

# Sitecore InDesign Connector 1.0 User Manual

*Creating InDesign Documents with Sitecore CMS*

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# Chapter 1

## Introduction

This document describes how to use the Sitecore InDesign connector that can be used to create InDesign output based on content stored in the Sitecore CMS. It assumes that you have good knowledge of both Sitecore and InDesign.

- **Chapter 1 - Introduction**
- **Chapter 2 - Starting Up**
- **Chapter 3 - The Libraries Panel**
- **Chapter 4 - The Project Panel**
- **Chapter 5 - Creating Snippets**
- **Chapter 6 - The Templates Panel**
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- **Chapter 8 - Using the Media Panel**
- **Chapter 9 - The Extensions Panel**
- **Chapter 10 - Menu Settings**
- **Chapter 11 - Creating Snapshots**
- **Chapter 12 - Using the Workbox**

## Chapter 2

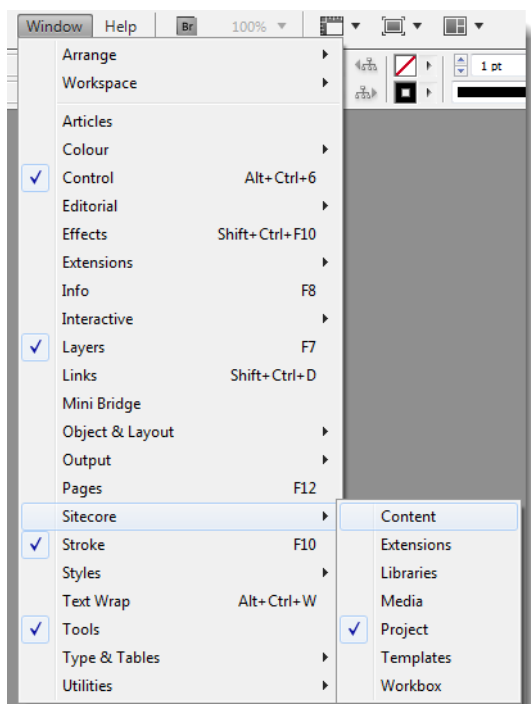
### Starting Up

This chapter briefly describes how to start the Sitecore InDesign connector plugin.  
This chapter contains:

- Starting the Plugin in InDesign
- Buttons in Sitecore Panels
- The Panel Menu
- Project Structure
- Log in to Sitecore
- Logging off

## 2.1 Starting the Plugin in InDesign

1. Open InDesign.
2. Select the **Window** menu.
3. Select Sitecore.
4. Select the panel you wish to work with:



In total, there are seven panels:









- The **Content** panel gives access to the contents repository.
- The **Extensions** panel gives access to the available extensions.
- The **Libraries** panel gives access to all InDesign library items.
- The **Media** panel gives access to image media items.
- The **Project** panel is used for working on the InDesign projects.
- The **Templates** panel gives access to the data templates.
- The **Workbox** shows the workflow stages and items in the workflow.

## 2.2 Buttons in Sitecore Panels

This table displays an overview of the buttons in the different Sitecore InDesign Connector panels.

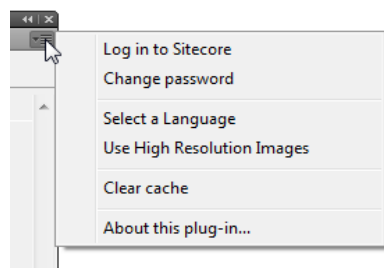
| Button  | Description                          | Panels  |         |           |       |           |         |            |
|---|--------------------------------------|---------|---------|-----------|-------|-----------|---------|------------|
|   |                                      | Project | Content | Libraries | Media | Templates | Workbox | Extensions |
|    | Publish the current item             | X       |         | X         |       |           |         | X          |
|    | Save the current item                | X       |         | X         |       |           |         | X          |
|    | Save page item                       | X       |         |           |       |           |         |            |
|    | Add                                  | X       | X       | X         |       | X         |         | X          |
|    | Add a folder                         |         |         | X         |       | X         |         | X          |
|    | Duplicate                            | X       |         |           |       |           |         |            |
|    | Delete selected item                 | X       | X       | X         |       | X         |         | X          |
|    | Cut item                             |         | X       | X         |       | X         |         | X          |
|  | Copy item                            |         | X       | X         |       | X         |         | X          |
|  | Paste item                           |         | X       | X         |       | X         |         | X          |
|  | Add note                             | X       |         |           |       |           |         |            |
|  | Find assigned item                   | X       | X       |           |       |           |         |            |
|  | Insert field as variable             |         |         |           |       | X         |         | X          |
|  | Refresh                              | X       | X       | X         | X     | X         | X       | X          |
|  | Find frame in tree                   | X       |         |           |       |           |         |            |
|  | Move selected item to first position | X       | X       | X         |       | X         |         | X          |
|  | Move selected item one position up   | X       | X       | X         |       | X         |         | X          |
|  | Move selected item one position down | X       | X       | X         |       | X         |         | X          |
|  | Move selected item to last position  | X       | X       | X         |       | X         |         | X          |
|  | Update language                      | X       |         |           |       |           |         |            |



| Button   | Description           | Panels  |         |           |       |           |         |            |
|--|-----------------------|---------|---------|-----------|-------|-----------|---------|------------|
|  |                       | Project | Content | Libraries | Media | Templates | Workbox | Extensions |
|   | Create new version    | X       |         |           |       |           |         |            |
|   | Load selected version | X       |         |           |       |           |         |            |
|   | Place selected image  |         |         |           | X     |           |         |            |
|   | Previous panel        |         |         |           | X     |           |         |            |
|   | Next panel            |         |         |           | X     |           |         |            |
|   | Find image            |         |         |           | X     |           |         |            |
|   | Open item             |         |         |           |       |           | X       |            |
|  | Accept item           |         |         |           |       |           | X       |            |

## 2.3 The Panel Menu

With the Panel menu you can choose different functions that are common to all panels.



**Note**

The panel menu is available and identical for all panels.

## 2.4 Project Structure

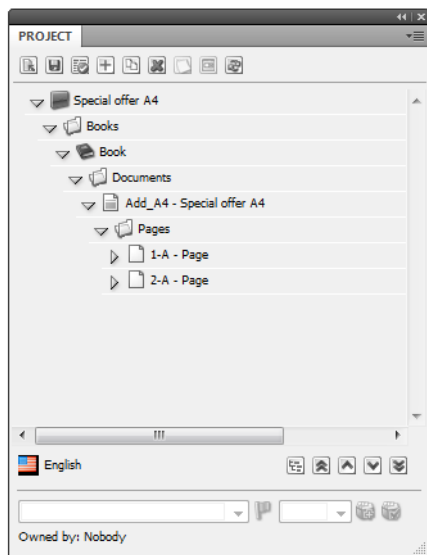
The project structure of each InDesign project contains several elements and folders.

A project consists of a number of elements with a structure corresponding to the InDesign model of a document.

- A *project* consists of an InDesign book (corresponds to the InDesign book (.indb)).
- A *book* can have one or more document items (correspond to InDesign documents (.indd)).
- A *document* can have one or more page items (correspond to InDesign pages).

- A *page* can have one or more snippets that hold page items, for example text frames, images, rectangles, and so on, which correspond to InDesign objects.

Open the project tree by clicking the nodes on each level.



Depending on the node selected in the tree, buttons are enabled/disabled or may have different functions.

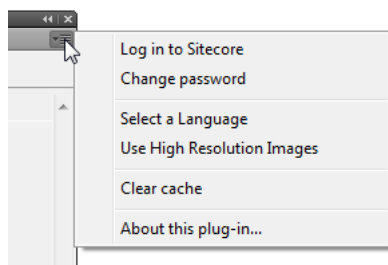
- For example, clicking the **Save** button with the document node selected means “save the document”.
- Clicking the **Save** button the page node selected means “save the page”.

#### Note

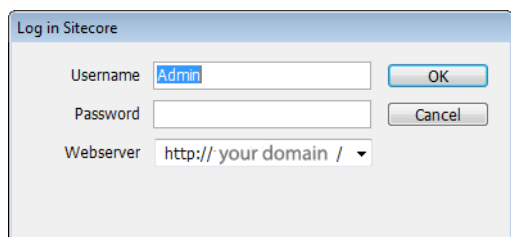
All your settings, lay-out and so on are saved in the Sitecore content management system (CMS) when you save your document and pages. Therefore, there is no need to save the document as a physical file unless you want to.

## 2.5 Log in to Sitecore

To log in, in the **Panel** menu click **Log in to Sitecore**:



The **Log in Sitecore** dialog box is displayed.



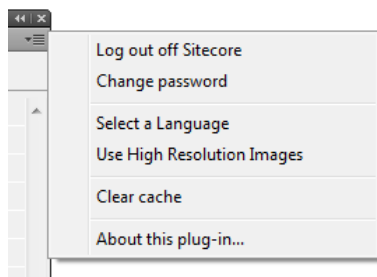
Enter a valid username and password using a Sitecore user account. Select the URL for the web server or select **New value** in the drop down list and then type the URL. This will save the new URL so that it will appear in the drop-down list the next time you start InDesign.

#### Note

The URLs are saved in the ini file located in the same folder as the plugin (for example C:\Program Files (x86)\Adobe\Adobe InDesign CS5.5\Plug-Ins\Sitecore). When you are not able to save new URLs, this might be caused by insufficient access rights to that specific folder. In that case consult your system administrator.

## 2.6 Logging off

To log off, select **Log out off Sitecore** in the panel menu:



## Chapter 3

### The Libraries Panel

The **Libraries** panel shows all available libraries that can be used to create an InDesign project. The libraries contain:

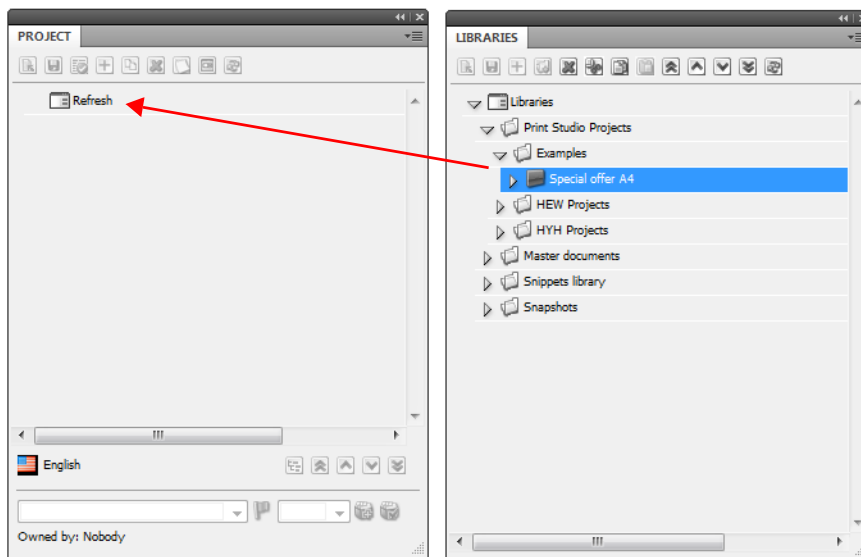
- InDesign projects (Print Studio Projects)
- Master documents
- Lay-out snippets
- Snapshots

This chapter covers:

- Opening Projects
- Adding Folders
- Creating New Projects
- Creating New Master Documents
- Modify Master Documents
- Creating Master Snippets
- Adjusting Master Snippets
- Creating Snapshots

### 3.1 Opening Projects

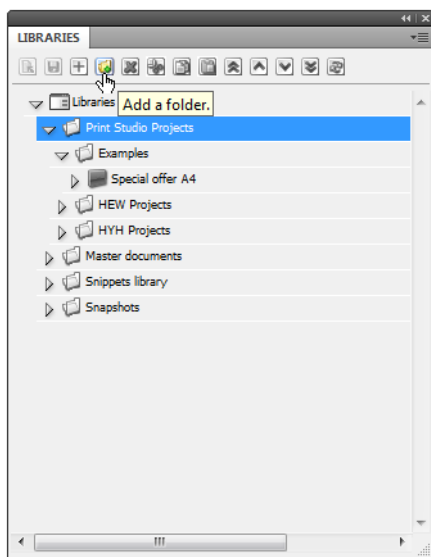
1. To open a project, open the **Print Studio Projects** folder.
2. Then locate the project you want to open and drag it to the root node in the **Project** panel.



The project is loaded in the project panel and you can start working with it.

### 3.2 Adding Folders

1. Select the folder where you want to create the new folder.
2. Click the **Add a folder** button:



3. In the **Item name** dialog window write the name for the new folder and click OK.
4. The new folder item is created.

5. Click the **Refresh** button.

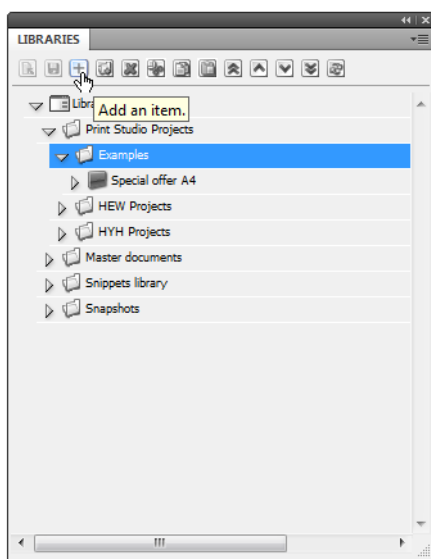


#### Note

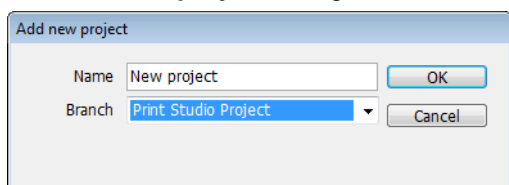
You can right-click to rename any item in the tree.

### 3.3 Creating New Projects

1. In the **Print Studio Projects** section in the **Libraries** panel, select the folder in which you want to create the new project.
2. Click the **Add an item** button:



The **Add new project** dialog window is displayed:

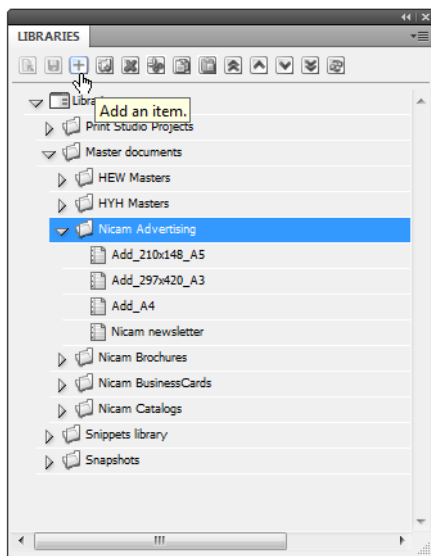


3. Enter the name of the new project and click one of the available project branches from the **Branch** drop-down list. The project branches are stored and created in the Sitecore CMS, and you can change those or create additional ones if required. This is only possible when you have administrator or sufficient user access rights.
4. Click **OK** to create a new project with basic structure based on the selected branch.
5. To open this project, drag it to the top node in the project panel as described earlier.

### 3.4 Creating New Master Documents

1. Create a new document in InDesign (or open an existing document).
2. Open the **Libraries** browser.

3. Click the **Add** button:

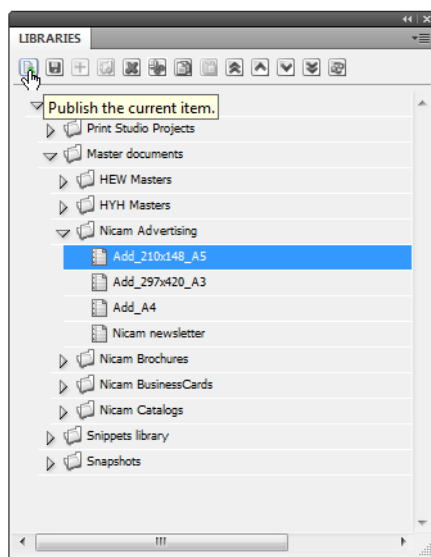


4. The New master dialog is displayed.
5. Enter the name of the new master and click **OK**.
6. A new master document is created in the selected folder.
7. Click refresh to refresh the tree.

### 3.5 Modify Master Documents

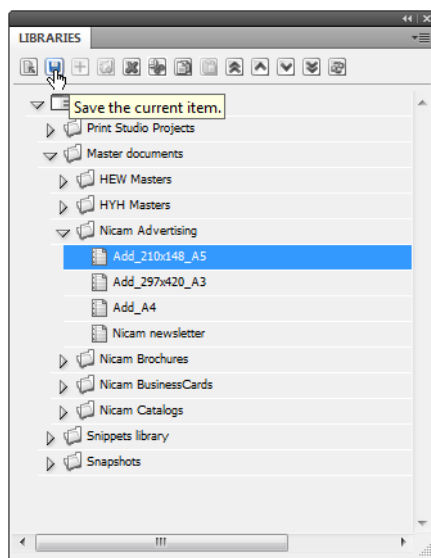
To modify a master document, first load the document from the library.

1. Click the **Master document** that you want to modify.
2. Click the **Publish the current item** button.



The master document is opened.

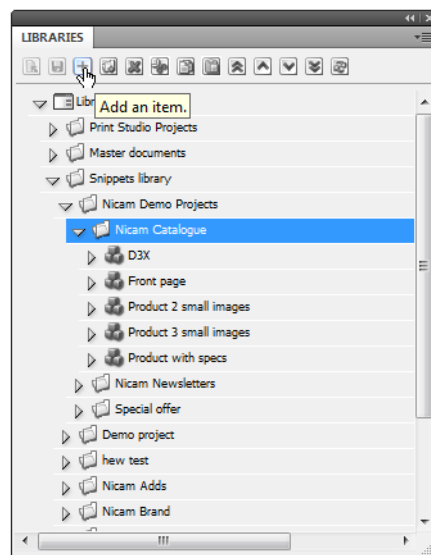
3. Then make the required changes to the document (for example change paragraph style settings).
4. When you have made the settings, with the **Master document** item selected in the tree *and* the document open in InDesign, click the **Save the current item** button.



### 3.6 Creating Master Snippets

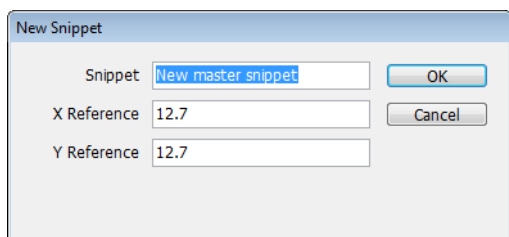
Create a folder for your master snippets

1. Click the **Add a folder** button to create a new folder or select an existing folder in the Snippets library section.
2. Click the **Add an item** button.





- The **New Snippet** dialog box is displayed. Enter a valid name and click OK.



To add items to the master snippet, see Chapter 5 - Creating Snippets on page 39.

#### Note

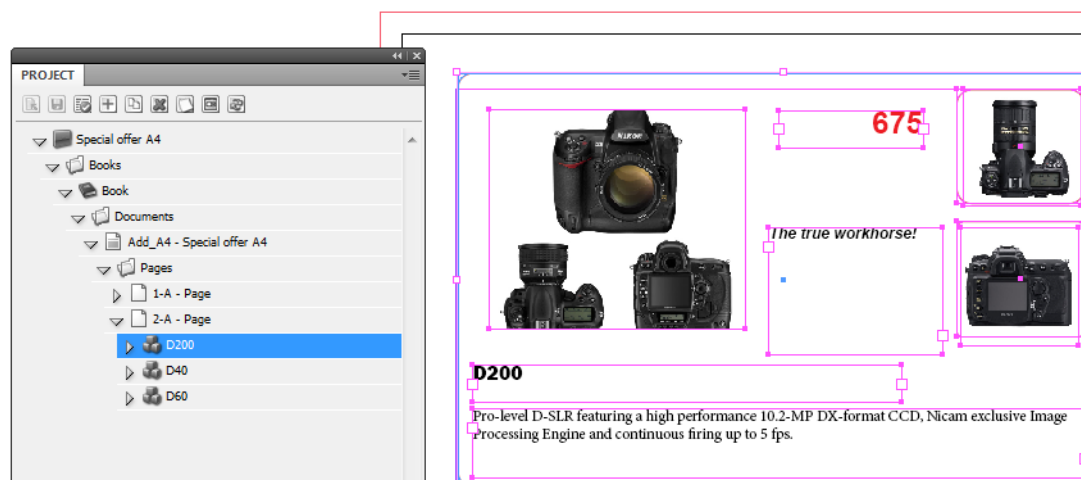
The **X Reference** and **Y Reference** fields ensure backwards compatibility and they are redundant for this version. When creating a new master snippet, simply maintain the default values.

#### Note

You can also create a new master snippet from a page snippet. This process is described in Creating Snippets on page 39.

## 3.7 Adjusting Master Snippets

- To adjust an existing master snippet, first publish the master snippet.
- With an open master document, click **Master snippet** in the tree.
- Click the **Publish the current item** button.

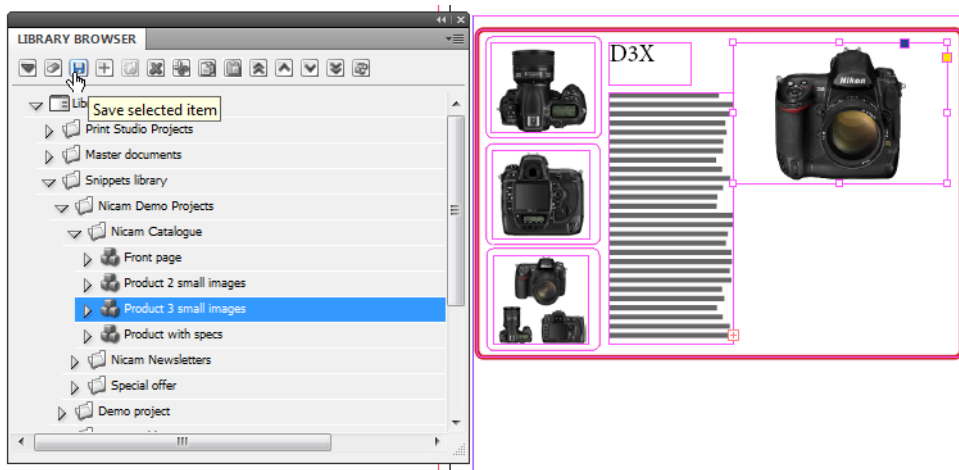


- The snippet is published on the active page. You can then adjust the page items.
- To save your changes, click the snippet item in the tree.

#### Note

Although not a requirement, it is easier if you publish the master snippet with the correct master document opened since that document contains the correct style settings.

- Click the **Save selected item** button



### 3.8 Creating Snapshots

You can create a snapshot to show a thumbnail images of snippets. The snapshots are JPEG images stored in the Sitecore media library. To create a snapshot of a master snippet, see Chapter 11 - Creating Snapshots on page 77.

## Chapter 4

# The Project Panel

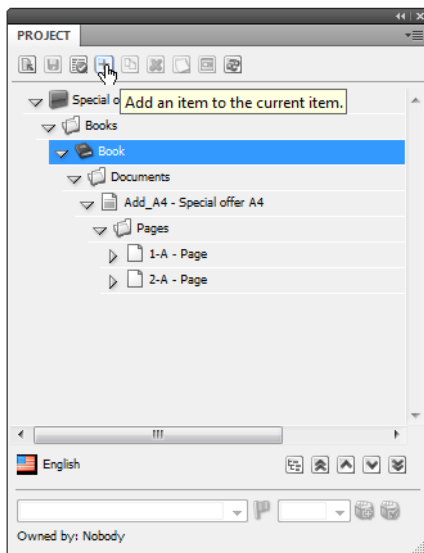
This chapter describes how you use the project panel to work with the Print Studio projects. This chapter contains:

- Adding Document Folders
- Adding New Documents
- Adding Pages Folder to a Document
- Adding New Pages
- Renumbering Pages in Documents
- Renumbering Pages in Pages Folder
- Using Items from Existing Projects in a New Project
- Assigning Master Documents
- Saving Master Document Changes
- Publishing documents and pages
- Saving Documents
- Saving Pages
- Saving static page items
- Selecting Items
- Selecting Items
- Renaming Items
- Renaming and Scaling Image frame Items
- Duplicating Items
- Deleting Items
- Adding Notes
- Creating Text Flows
- Locating Assigned Items and Templates

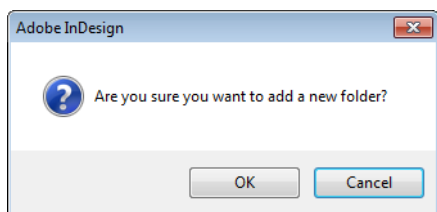
## 4.1 Adding Document Folders

After you have opened the project in the **Project** panel, you can add items to the project.

1. To add a **Document** folder to the **Book** item, click the **Book** item:



2. Click the **Add** button:



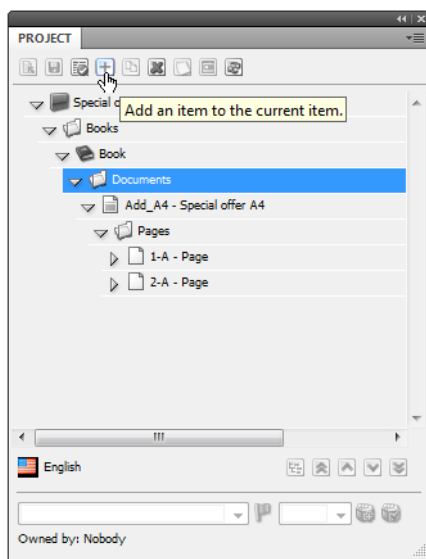
3. Click **OK**.  
A new documents folder is added to the selected book.
4. Click the **Refresh** button to refresh the tree structure.

## 4.2 Adding New Documents

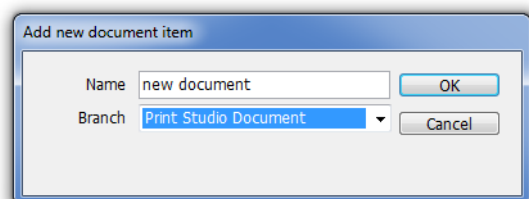
To add a document:

1. Click the **Documents** folder you want to add the new document to.

2. Click the **Add** button:



The **Add new document item** dialog window opens:



3. Enter the name of the new document item.
4. Click one of the document branches from the **Branch** drop-down list.
5. Click **OK** and a new document is added.
6. Click the **Refresh** button to refresh the tree structure.

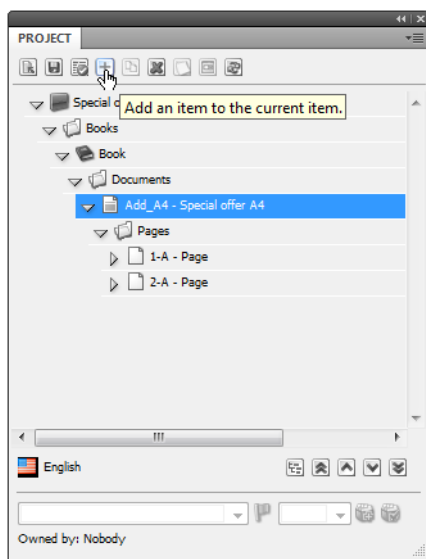
The document branches are stored and created in Sitecore. With sufficient access rights you can change the branches or create additional branches if required. Ask your administrator for more information on this subject.

## 4.3 Adding Pages Folder to a Document

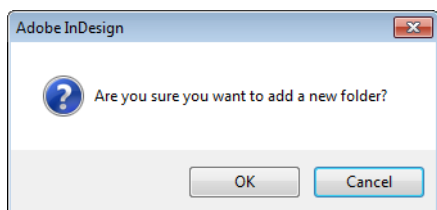
To add a **Pages** folder to a document item:

1. Click the document item you want to add the folder to.

2. Click the **Add** button:



This dialog box is displayed:



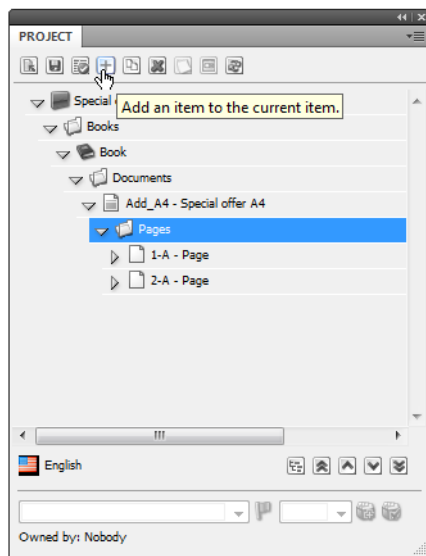
3. Click **Yes**. A new **Pages** folder is added to the selected document.
4. Click the **Refresh** button to refresh the tree structure.

## 4.4 Adding New Pages

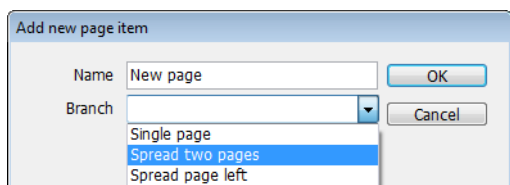
To add a page:

1. Click the **Pages folder** you want to add a page to.

2. Click the **Add** button:



The **Add new page item** dialog box is displayed:



3. Enter the name of the new page item and select one of the page branches from the **Branch** drop-down list. The page branches are created and stored in Sitecore. You can change the page branches or create additional page branches. Ask your administrator for more information about this subject.
4. Click **OK** and one or more new pages are added, depending on the branch you have selected.
5. Click the **Refresh** button to refresh the tree structure.

#### Note

When you add a page, you must select a branch. The value of the **Name** field is only applied if the branch item name has the parameter value \$name as it is set when you create a new branch. When you change the item name into a static name (for example "New page"), the added pages will always get that name and not the name you have entered in the **Name** field.

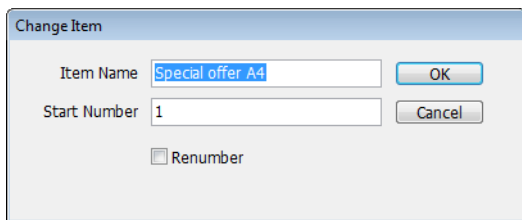
Only administrators and users with sufficient access rights can change this.

## 4.5 Renumbering Pages in Documents

To renumber a set of pages for an entire document:

1. Right-click the document item.

The following dialog box is displayed:

A screenshot of a 'Change Item' dialog box. It has a title bar 'Change Item'. Inside, there are two text input fields: 'Item Name' with the text 'Special offer A4' and 'Start Number' with the text '1'. To the right of the 'Item Name' field is an 'OK' button, and to the right of the 'Start Number' field is a 'Cancel' button. Below these fields is a checkbox labeled 'Renumber' which is currently unchecked.

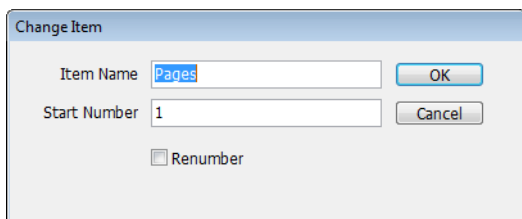
2. Enter the new start number.
3. Select the **Renumber** check box.
4. Click **OK**. All pages in the document are renumbered starting with the number provided in the **Start number** field.

## 4.6 Renumbering Pages in Pages Folder

To renumber a set of pages for a **Pages** folder:

1. Select the **Pages** folder of choice and right-click.

This dialog box is displayed:

A screenshot of a 'Change Item' dialog box. It has a title bar 'Change Item'. Inside, there are two text input fields: 'Item Name' with the text 'Pages' and 'Start Number' with the text '1'. To the right of the 'Item Name' field is an 'OK' button, and to the right of the 'Start Number' field is a 'Cancel' button. Below these fields is a checkbox labeled 'Renumber' which is currently unchecked.

2. Enter the new start number, select the **Renumber** check box.
3. Click **OK**.

All pages in the selected pages folder are then renumbered starting with the number given in **Start number**.

## 4.7 Using Items from Existing Projects in a New Project

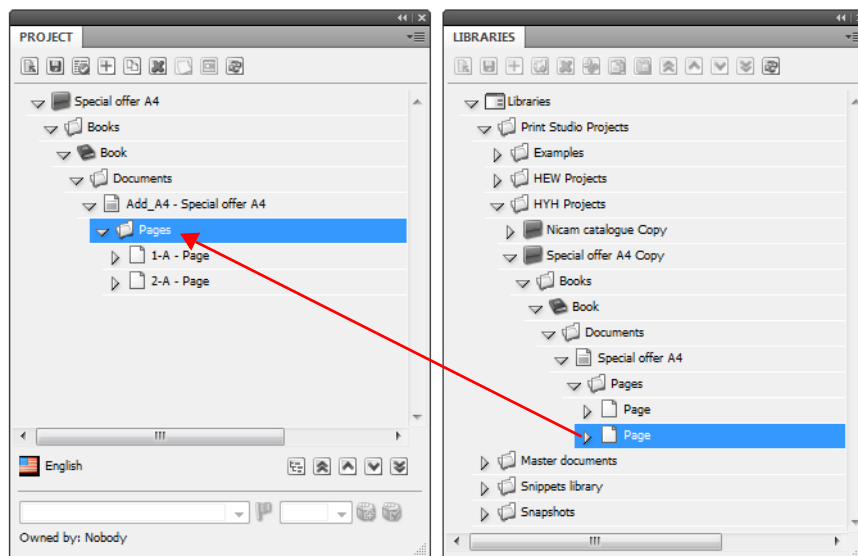
To re-use items (for example an existing page) from an existing project in a new project, drag and drop the items you want to use from the project in the **Libraries** panel to the opened project in the **Project** panel.

To drag and drop for example a page item:

1. Select the page item that you want to reuse.



2. Drag and drop this item to **Pages** in the open project in the **Project** panel:



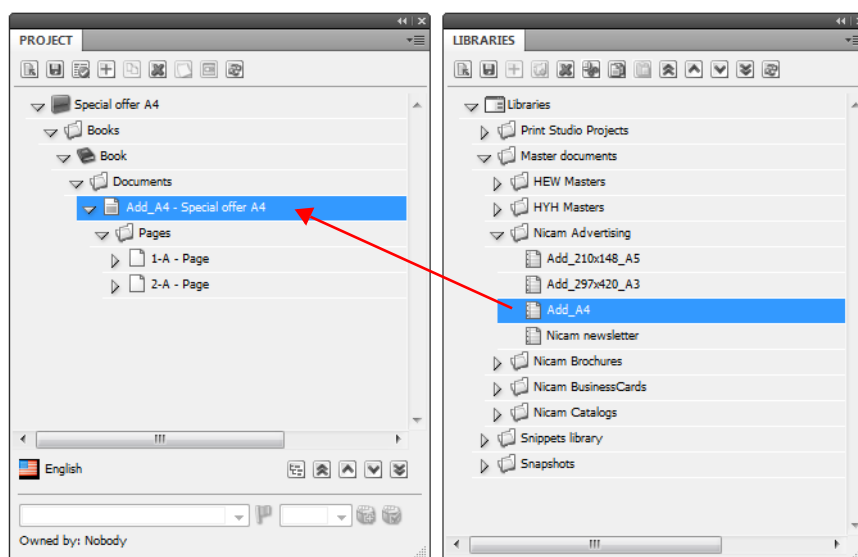
3. The selected page and all items on that page are added to the pages folder in the open project.

## 4.8 Assigning Master Documents

Every document *needs* to have a master document assigned. The master document holds all style settings like paragraph styles, character styles, page sizes, color definitions, margins and so on.

To assign a master document to a document item:

1. Select the required master document in the **Master documents** section (Libraries panel).
2. Drag it to the **Project** panel.
3. Drop the master document on the document item where you want to assign the master to.

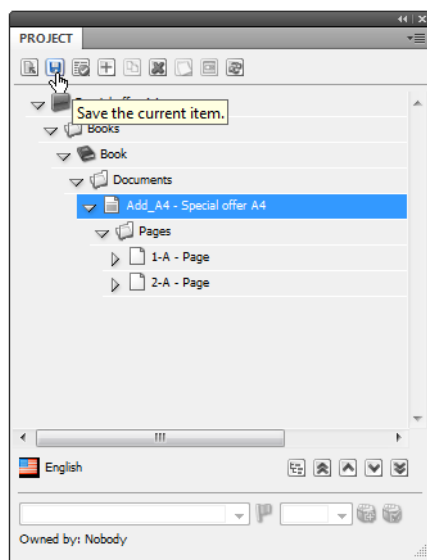


The master document is assigned to the document and a confirmation dialog box is displayed.

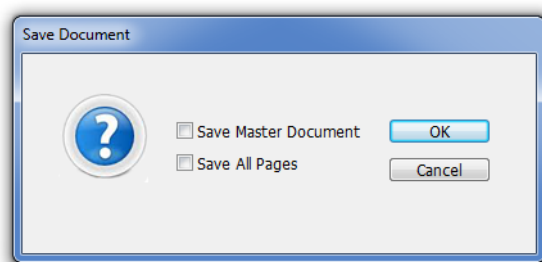
## 4.9 Saving Master Document Changes

When you have changed the style settings, you need to save the master document. You can just publish your document, make the needed changes and then save the document. To save a document:

1. Select the **Documents** node in the **Project** tree.
2. Click the **Save the current item** button:



The **Save Document** dialog box is displayed:



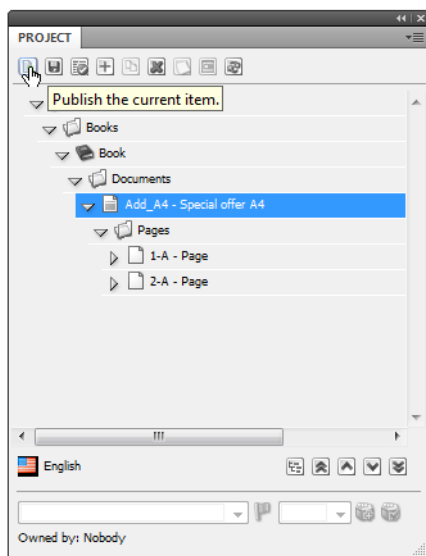
3. Here you have the choice to save your lay-out changes and also the master document changes. To save the master document changes, select the **Save Master Document** check box.
4. Click **OK**. The changes are saved.

## 4.10 Publishing documents and pages

To publish a document item:

1. Select the document you want to publish.

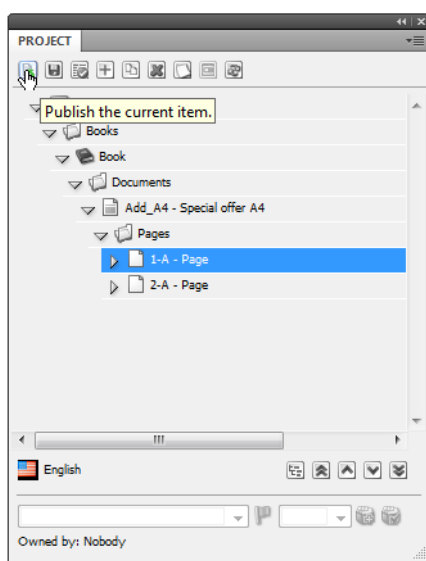
2. With the document item selected, click the **Publish the current item** button:



The selected document is published.

### To publish a page

1. Select the page item you want to publish.
2. Click the **Publish the current item** button:



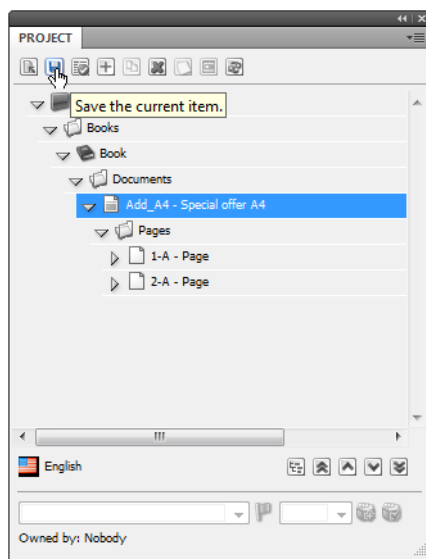
The page is published.

## 4.11 Saving Documents

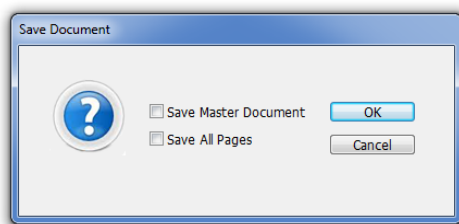
To save your document:

1. Publish the document (or part of it).
2. Make the required adjustments.

3. Select the **Document** item in the **Project** panel.
4. Click the **Save the current item** button:



This **Save Document** dialog window is displayed.



- Select the **Save All Pages** check box if you want to save the lay-out of all pages.
  - Select **Save Master Document** check box if you want to save the changes made to the master document as well.
5. Click **OK** to save.

#### Note

When **Save All Pages** is selected, only the published pages (and items on that page) are saved. Items that have not published are not saved. If you have published one single page, only that single page and the items on that page are saved.

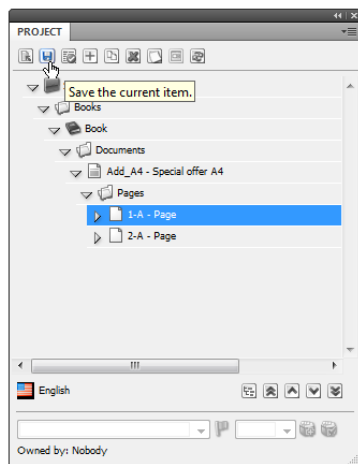
#### Note

Please be aware that if you are saving a large number of pages, it might take some time to process. If you want to avoid that, you can also use the Save Page method instead.

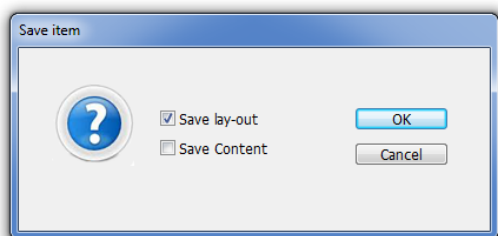
## 4.12 Saving Pages

To save a page and all the page items on the page:

1. Select **Page** item you want to save in the tree:



2. Click the **Save** button:



3. Select the **Save content** check box if you want to save the contents of the text frames on the selected page as well. That will only be possible for items with sufficient access rights.
4. Click **OK**.

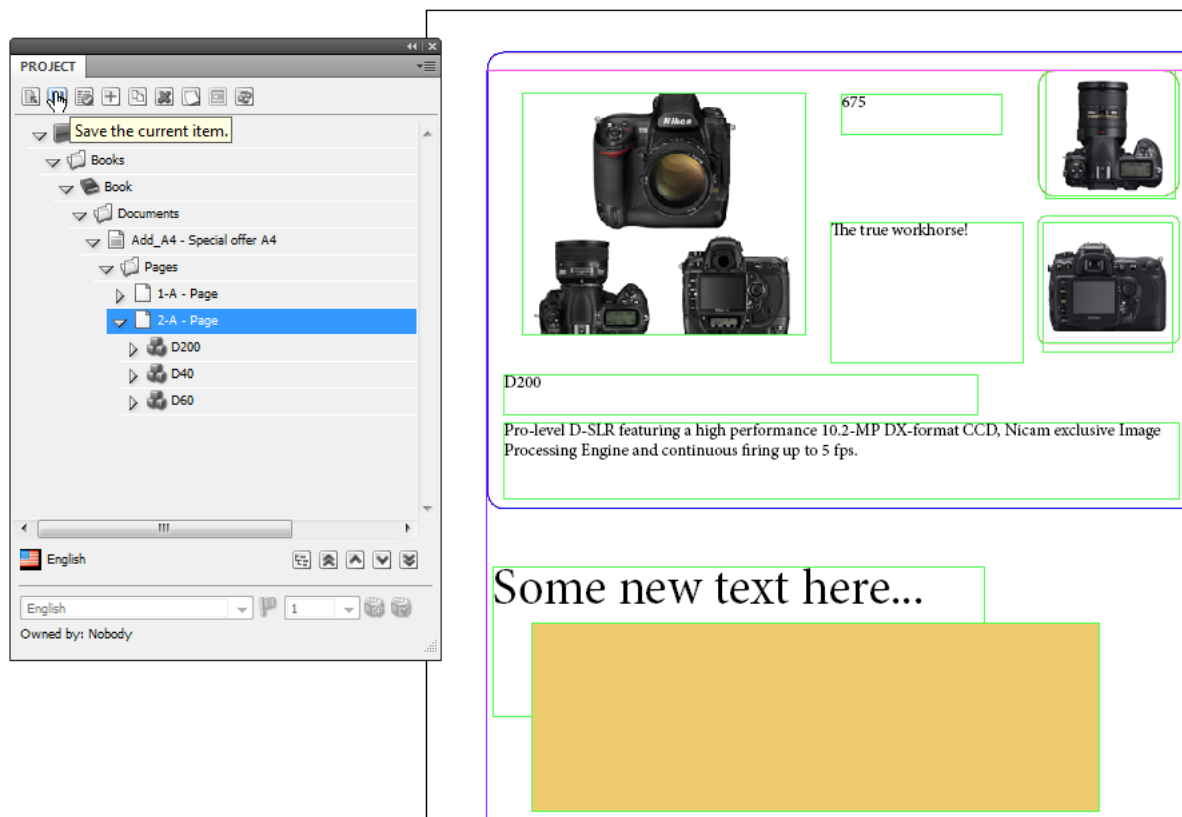
#### Note

You can create and use a master page in the same way as any master page in InDesign. If you want to use images on a master page, you must add them as embedded images or make sure the used images can be accessed by other users when the document is loaded.

## 4.13 Saving static page items

When you want to add some content or page items to the page that are not stored in the CMS, you can either add it as page specific items or as “static items” to a snippet item. You can also add so called “soft texts” to a snippet, see 4.21 Creating Soft Texts on page 35.

In order to add page specific items (for example rectangles, text frames (with content), image frames, etc.), simply add the needed items and save the page. The items are recognized as “static” (not data driven from the CMS) and are saved as part of the page item.



#### Note

If you add images as static items to a page, make sure the images are accessible for other users as well.

#### Note

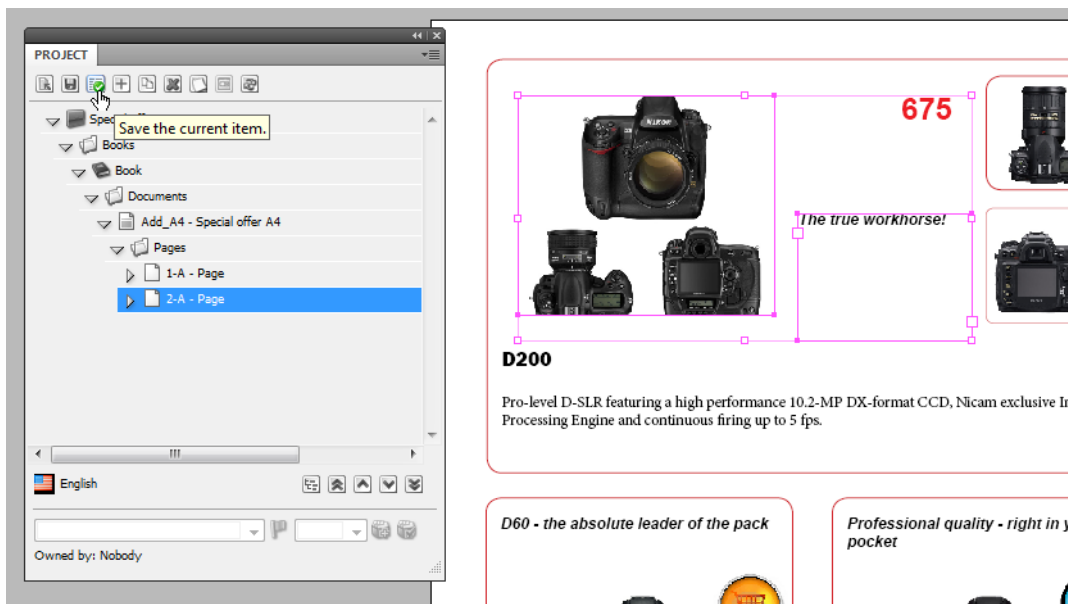
Page specific content is not displayed in the Print Studio Editor. If that is a requirement, please add static items to a snippet instead.

## 4.14 Saving selected page items

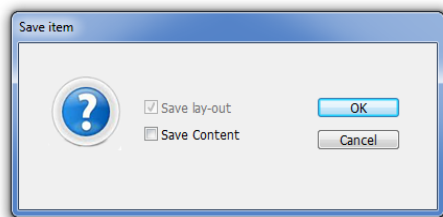
To save one or more selected page items.

1. On the page lay-out, select the page item(s) that you want to save.

2. With the items selected, click the **Save the current item** button:



The **Save item** dialog window is displayed:



3. Select the **Save Content** check box to save the contents of any selected text frame to the assigned content item/field as well.

**Note**  
You can only save content changes if you have sufficient access rights (and if the item is not locked by a different user).

**Note**  
You can change the contents of single line text, multi line text, rich text field and Print Text fields. If the corresponding field is of the Rich Text type or Print Text type, you can also change the formatting by using manual overrides (Font, Font size, Font style, Underlined, Strike Through, Small Caps, All Caps, Leading, Horizontal scale, Vertical scale, Skew, Leading, Superscript, Subscript, Baseline shift) or by using character styles and paragraph styles.

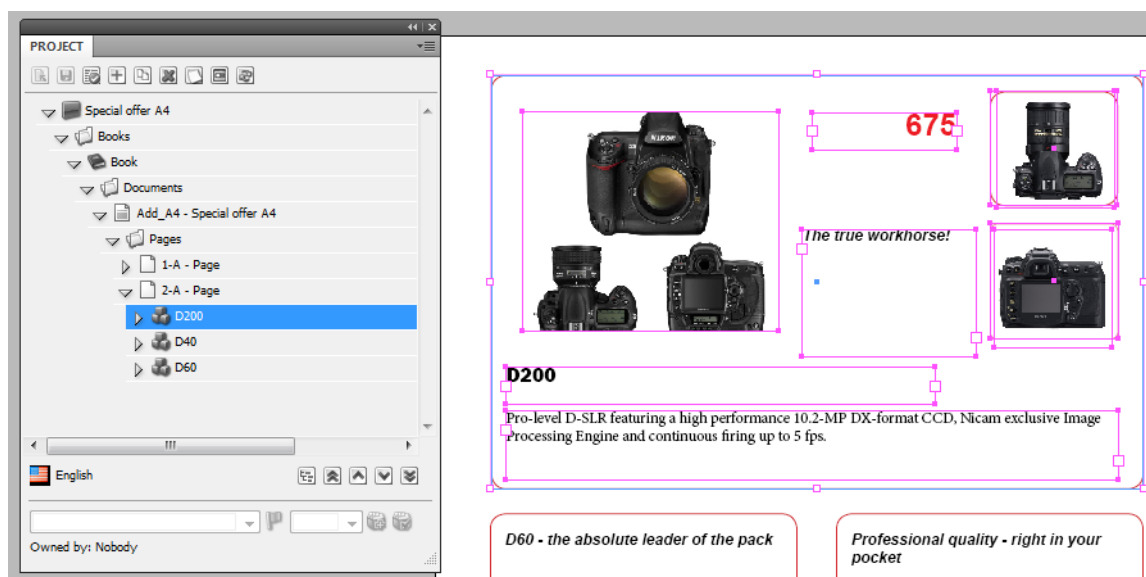
**Note**  
Be aware that you are saving the contents in the selected language as indicated by the flag and language name:



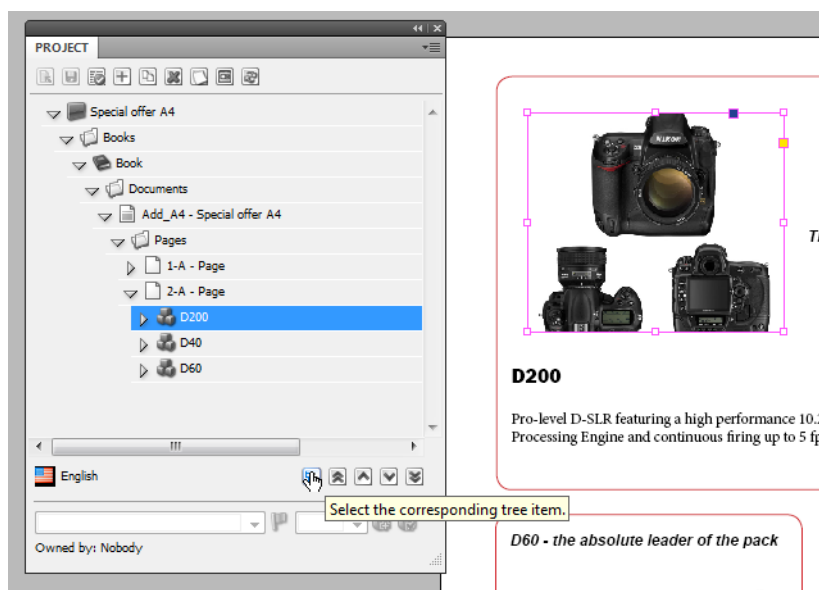
## 4.15 Selecting Items

To select a specific snippet or a child item of a snippet from the tree on the page, select the item in the **Project** tree and double-click. The related InDesign object is selected on the page.

To select all items of a snippet, double-click the snippet item:



The other way around, select the InDesign object you want to find and click the **Select the corresponding tree item** button:



The related item is selected in the project tree.

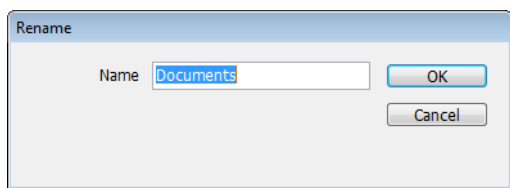
## 4.16 Renaming Items

To rename an item in the tree:

1. Select the item in the tree and right-click.



The **Rename** dialog box is displayed:

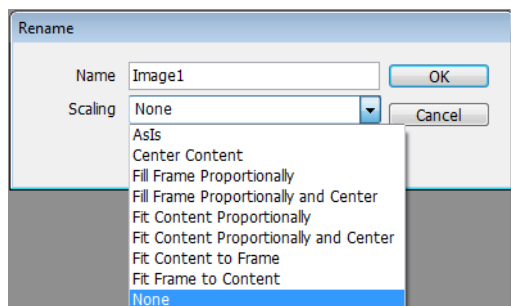


2. Enter the new item name.
3. Click **OK**.
4. Click the **Refresh** button to refresh the tree.

Depending on the type of item, more or less fields will be shown.

## 4.17 Renaming and Scaling Image frame Items

When renaming an **Image** frame item, you can also select the method of automatic *scaling* for the image:

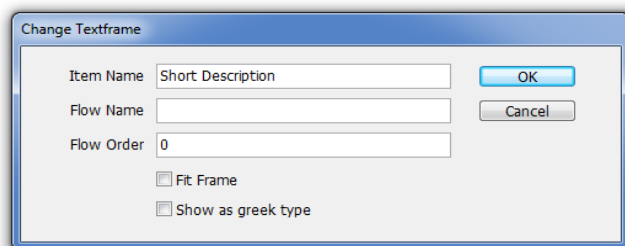


The scaling methods correspond to the scaling (or fitting) options available in InDesign, and is only visible when (re)publishing the corresponding item.

- Except **Fit Content Proportionally and Center** which is a combination of **Fit Content Proportionally** and **Center Content** and not present in InDesign.
- Select **None** if you do not want to use automatic scaling but manual positioning of the image item.

## 4.18 Renaming Text Frame Items

When renaming a **Text** frame item, you can also set some other settings, such as:

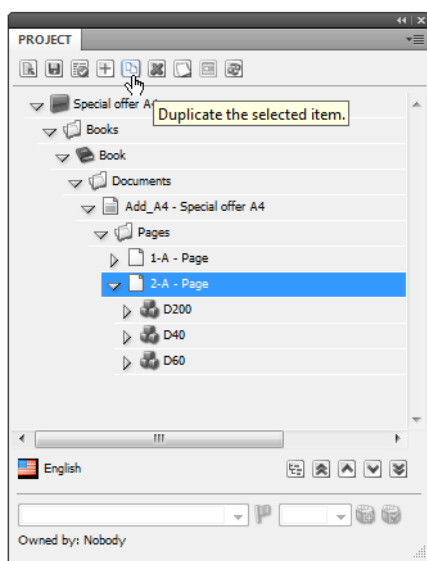


You can use the “Flow Name” and “Flow Order” field to create a set of connected text frames. For more information, see *Creating Text Flows* on page 37. Select “Fit Frame” if you want the text frame to automatically fit to the frame contents when it is published. Select “Shows as greek type” when the frame needs to be displayed as “Greek” type in the Print Studio Editor. This is needed when you are publishing content that has formatting that is not supported in that editor or when you simply do not want to show the content in the editor.

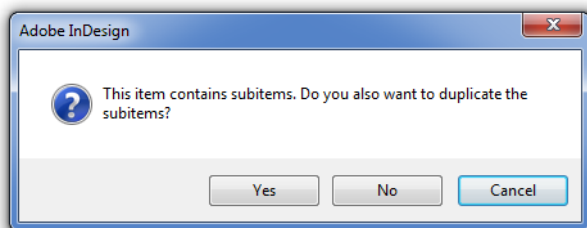
## 4.19 Duplicating Items

To duplicate an item:

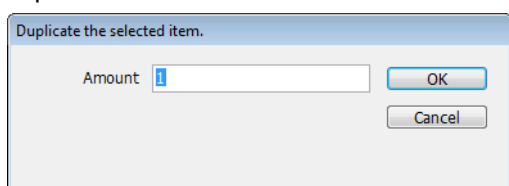
1. Select the item in the tree.
2. Click the **Duplicate the selected item** button:



A dialog box is displayed asking if you want to include the child items of the selected item:



3. Click **Yes** to include the child items.
4. Click **No** to just duplicate the selected item without its child items.
5. A dialog box is displayed, in which you can enter the amount of times you want the item to be duplicated.

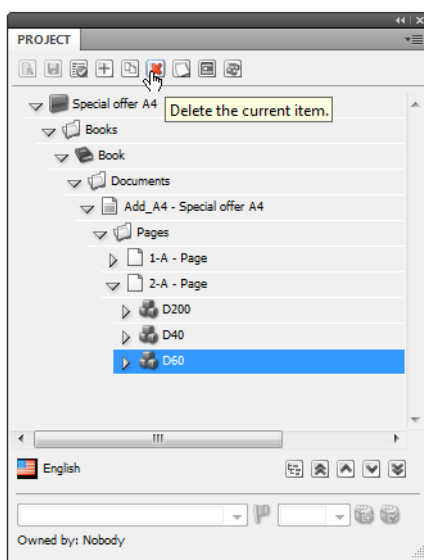


6. Click **OK** to duplicate the item.

## 4.20 Deleting Items

To delete an item:

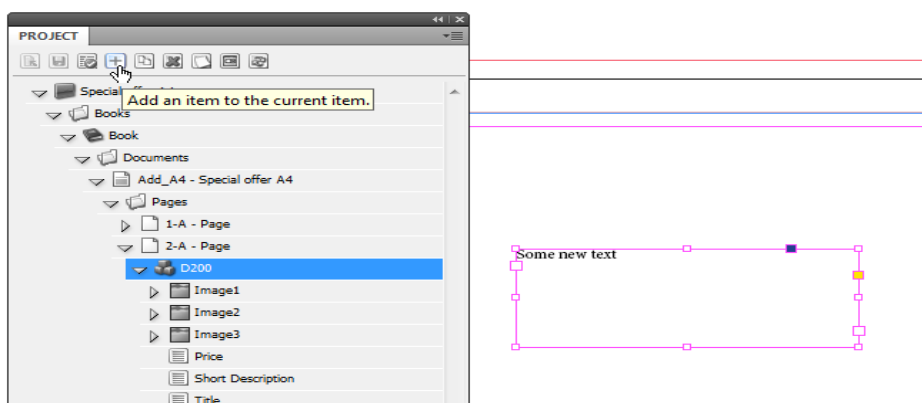
1. Select the item in the tree structure.
2. Click the **Delete selected item** button:



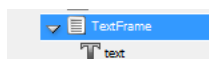
## 4.21 Creating Soft Texts

When you want to save content that is not available in the CMS yet, you have several options. You can create a new content item where you want to store the additional text items and use that item as with any other content item. You can also add a so-called soft text item. To create a soft text item:

1. Create a text frame with the content you want to use.
2. Select the snippet item you want to add the text frame to.
3. With the snippet item and the text frame selected, click the **Add** button:



A new text frame item with a text item as child is added to the snippet.

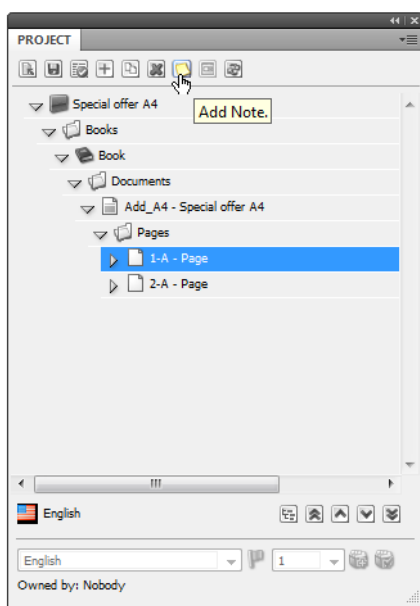


The text item contains the text as created in InDesign and can be changed in InDesign as well.

## 4.22 Adding Notes

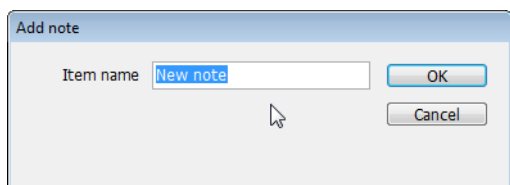
To add a note to a page:

1. Select the page item in the tree structure where you want to add the note.
2. Click the **Add Note** button:



The **Add Note** dialog box is displayed.

3. Enter a name and click **OK**:



A note item is created.

4. Click the **Publish the selected item** button to re-publish the page. A new note is published on the page.
5. Move and resize the note frame and change the note content.

6. Save the page lay-out changes.

**Note**

A note is basically a text frame with some default settings. When a new note is created, it uses a background color called Yellow, and it has an object style called Note. These settings are controlled in the Sitecore item template defining the note item. The text is formatted with some default paragraph styles called Text (for the top line containing the date and username) and Sticky for the note text. You can change the settings of the different styles in the InDesign master document to have a different look of the notes.

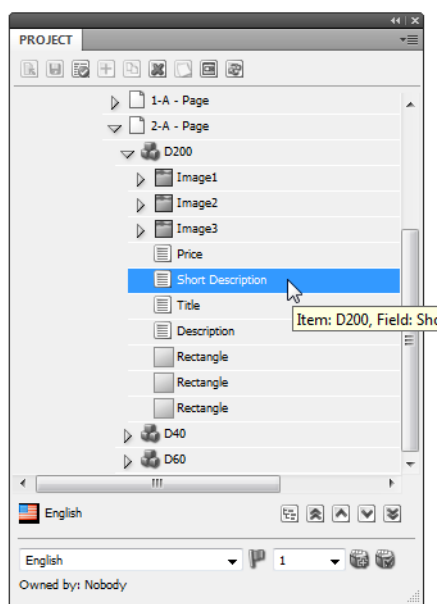
## 4.23 Creating Text Flows

To connect two or more text frames in order to create a text flow:

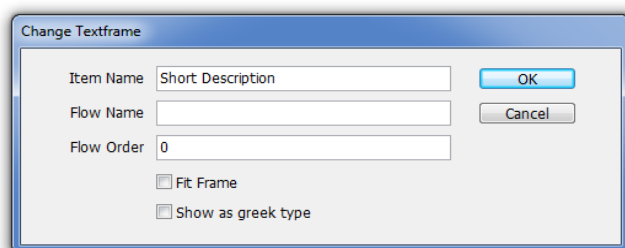
1. Select the text frame item in the tree structure you want to connect from.
2. Drag the item to the text frame item in the tree structure you want to connect to.

The two text frames will then be connected and the contents of the both frames will be flowing from the first frame into the connected frame.

To connect more text frames, you can simply connect the second frame to the third frame:



The text flow (which frames are connected and in which order) is controlled by the values of the **Flow Name** and **Flow Order**. You can access those fields also by selecting the text frame item in the tree structure and right-click. The **Change text frame** dialog box is displayed:

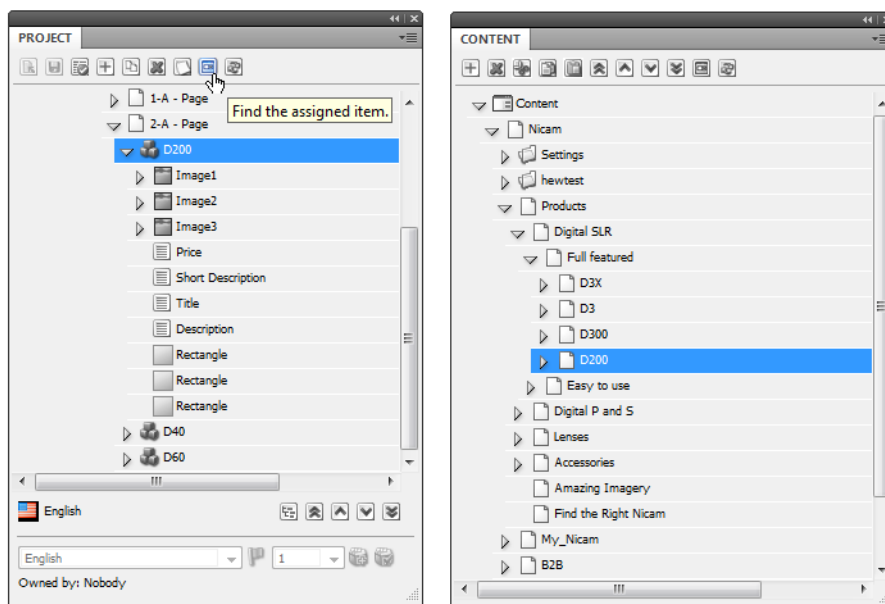


The value of the **Flow name** field defines which frames will be connected when publishing. All frames with identical flow name value will be connected. The **Flow order** value defines the order of those text frames. When using the drag and drop method as described earlier, a unique ID is used to identify the flow name.

## 4.24 Locating Assigned Items and Templates

To locate the assigned content item for a snippet:

1. Open the **Content browser** panel.
2. Select the snippet item you want to use.
3. Click the **Find assigned item** button:



If the item is available/accessible, the item is located and selected in the content browser panel.

### Note

You can locate the used template as well. To do so, open the **Template browser** and repeat the procedure. If both the **Content browser** and the **Template browser** panels are open, it will try to find and select both the used item and its template.

## Chapter 5

# Creating Snippets

A snippet is a collection of page items (text frames, images, and so on) that publish the contents of a content item. So in general, a snippet item is a presentation of a content item on the page.

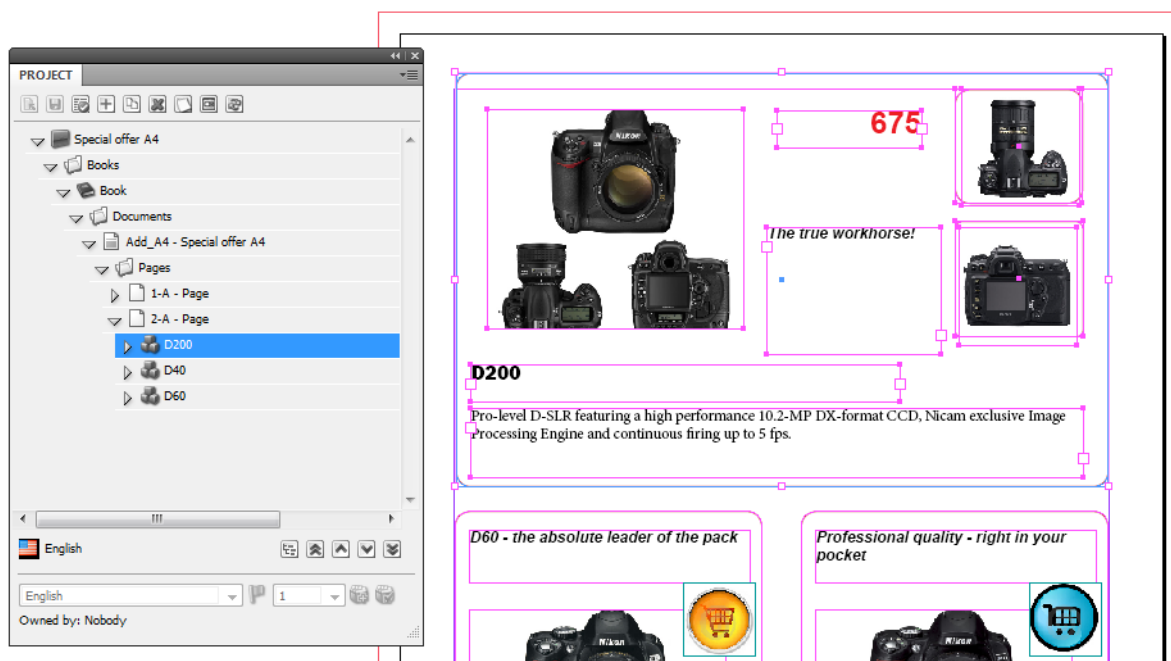
This chapter explains the concept of snippets and describes how you create snippets.

This chapter contains:

- Introduction
- Saving Page Snippets as Master Snippets
- Changing Assigned Fields
- Saving Page Snippets as Master Snippets
- The Templates Panel

## 5.1 Introduction

In this sample, we have used a snippet with some text frames and image frames to present the D200 product where the content for these frames is fetched from the CMS.



You can create page snippets and master snippets. Master snippets act as templates for the page snippets. In other words, you can use a master snippet as a template to create page snippets in a faster way.

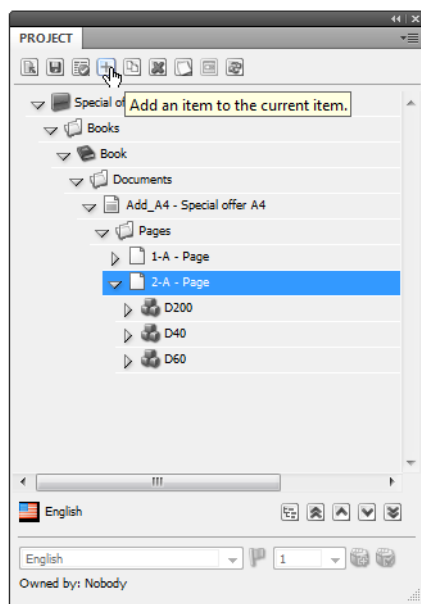
## 5.2 Creating new page snippets

To create a new page snippet:

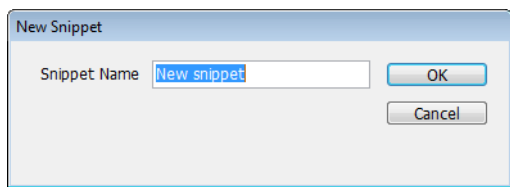
1. Select the page item to which you want to add the snippet item.



2. Click the **Add** button:



- The **New snippet** dialog box is displayed:



3. Enter the name of the new snippet.
4. Click **OK**.  
A dialog box is displayed to confirm the creation of the new snippet.
5. Click the **Refresh** button to refresh the tree structure.

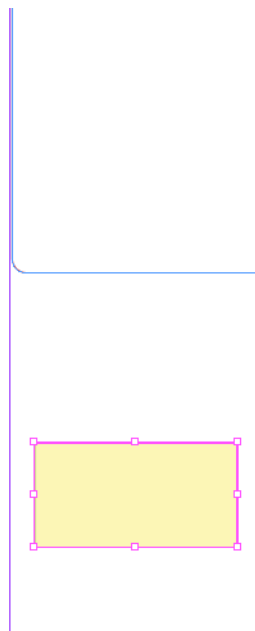
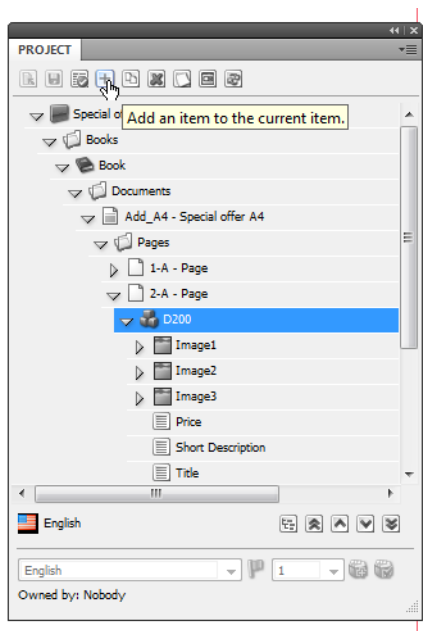
Then you can assign items (for example a text frame) to the new snippet item. To add items to a snippet, you can use two methods:

- Add a static item in InDesign and add it to the snippet.
- Add a dynamic item (text frame or image) based on a content field.

### 5.2.1 Add a static item

1. Create the item you want to add, for example a text frame or a rectangle.
2. Select this new item (or items) on the page and the snippet item selected in the tree.

3. Click the **Add** button



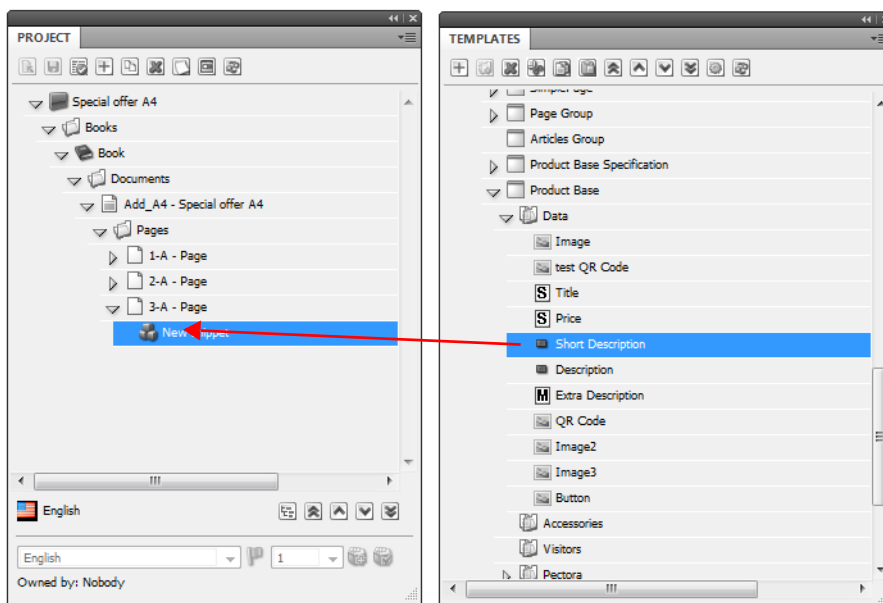
4. The new item is added to the snippet.
5. Click refresh to refresh the tree.

To add an image from the media library, see Chapter 8 - Using the Media Panel on page 55.

### 5.2.2 Add a dynamic item (text frame or image)

Locate the data template you want to use in the **Templates** panel.

1. Select the template field you want to use.
2. Drag and drop it to the snippet item in.

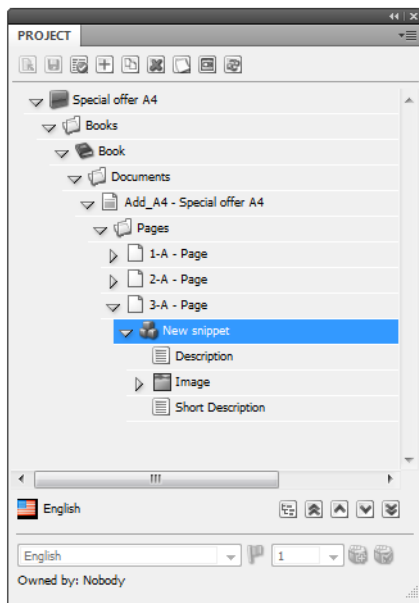


A new item is added to the snippet. In this case, because a text field was selected, a text frame item is added. To add an image (or QR code), select a field that contains an image and use the same procedure to add it to the snippet.

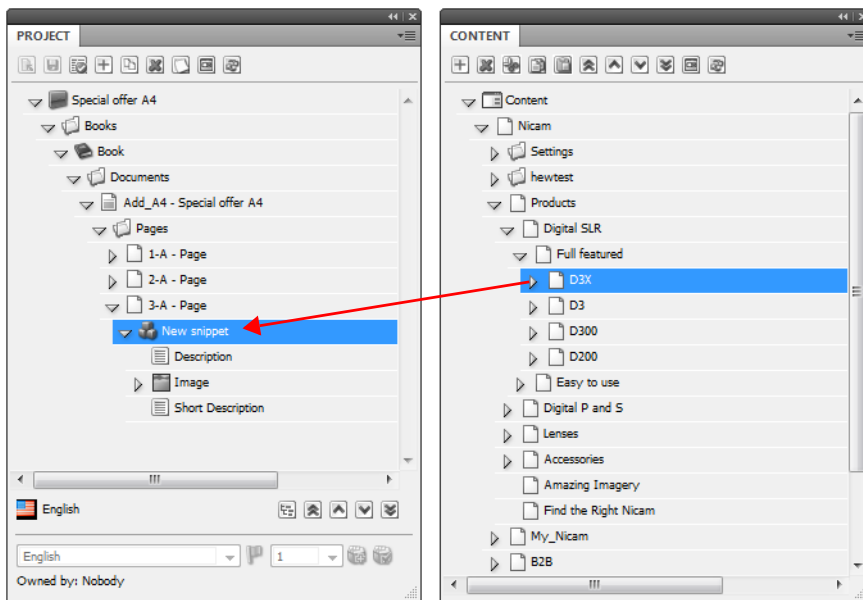
**Note**

You can also drag and drop a template section to the snippet item. That will create items for all the fields in the template section.

- After adding some text fields and an image field, the snippet could look like this:



1. To assign a content item to the snippet, select the content item in the **Content browser** panel.
2. Drag and drop the content item to the snippet item in the **Libraries browser**.



The content item is assigned to the snippet item (click refresh if needed). Now you can publish the page and adjust the page lay-out.

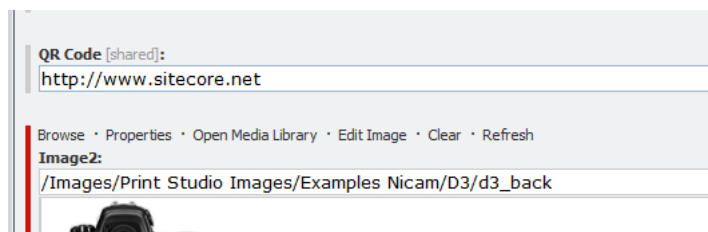
- When publishing a new snippet, initially the frames are published with the default settings as defined in the Sitecore templates used to create the page items.
  - Format all items as required (positioning, size, apply styles, and so on).
3. Then save the page or document.
  4. To add more items (static or dynamic) to the snippet, simply repeat the described procedures.

**Note**

You can also drag and drop a content item to a page item and assign the content item to all the snippets on that page.

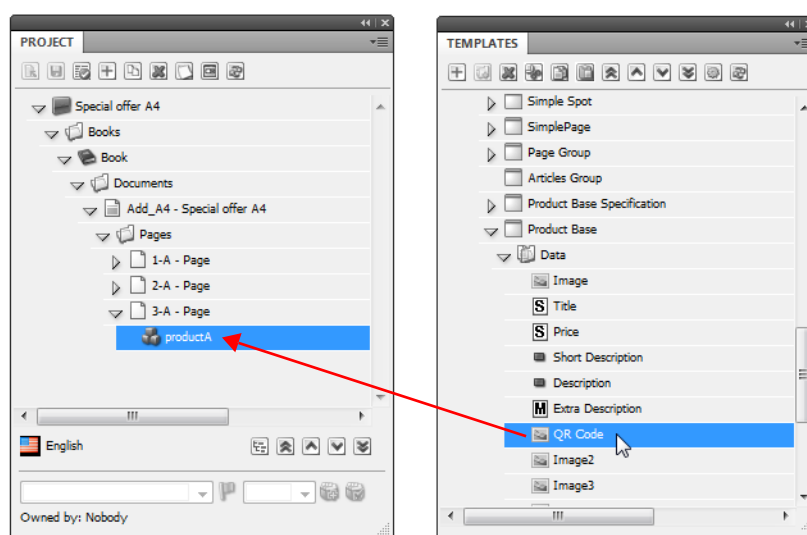
### 5.2.3 Add a QR code image

You can add QR code images to a snippet. The QR code image is rendered dynamically based on the value entered in Sitecore CMS. To add a QR code image, a special field type called “QR Code Image” can be used. As your administrator for additional information if needed. In the sample below, the QR code image is rendered based on the value “http://www.sitecore.net”. When the QR code is scanned, the URL “http://www.sitecore.net” is loaded.



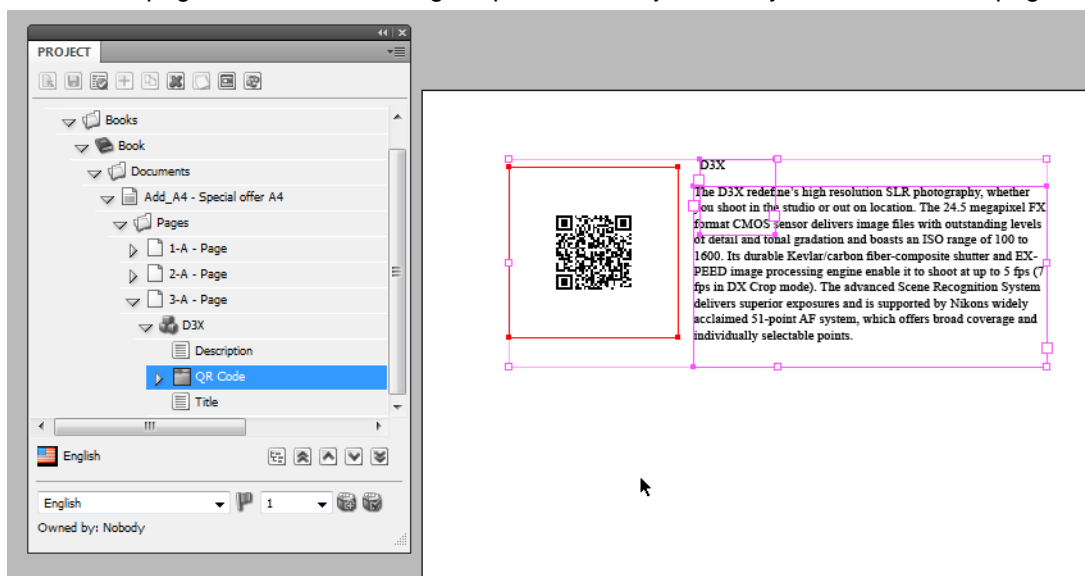
To add a QR code image to a snippet:

1. Select the QR field you want to use (**Templates** panel).
2. Drag and drop the field to the snippet (**Projects** panel).



3. The field is added to the snippet.

4. Publish the page. The QR code image is published. Adjust the lay-out and save the page.



### 5.3 Changing Assigned Fields

To change an assigned field for a certain item (text frame or image frame), drag and drop the field of choice to the item of choice.

#### Change the assigned field of a created text frame

1. Select the field of choice in the **Template** panel.
2. Drag the field to the text frame item.

#### Change the assigned field of a created image frame

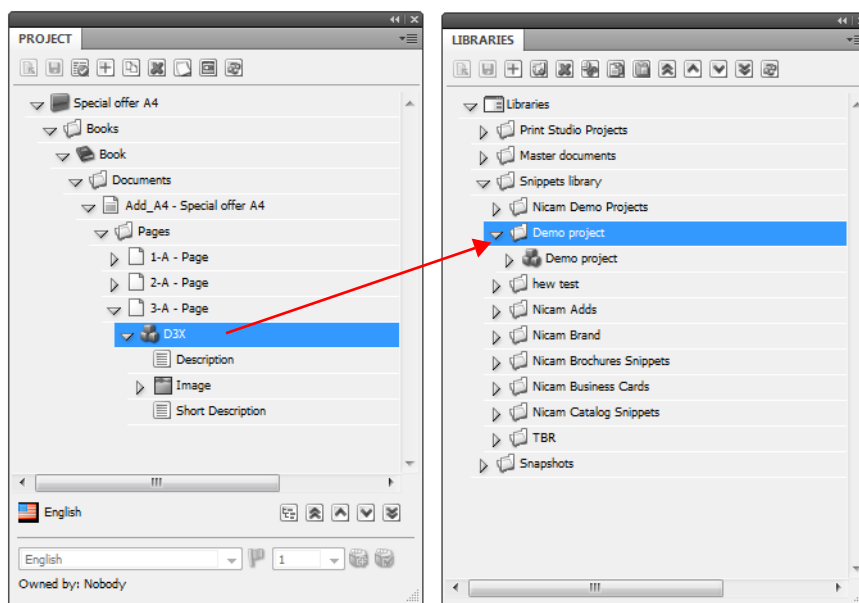
1. Select the image field of choice in the **Template** panel.
2. Drag the field to the image frame item.

### 5.4 Saving Page Snippets as Master Snippets

It is possible to save a page snippet as a new master snippet in the library. The procedure is as follows:

1. Select the snippet item in the **Project** tree.

2. Drag and drop the item to the folder of choice in the master snippets section of the **Libraries** panel.



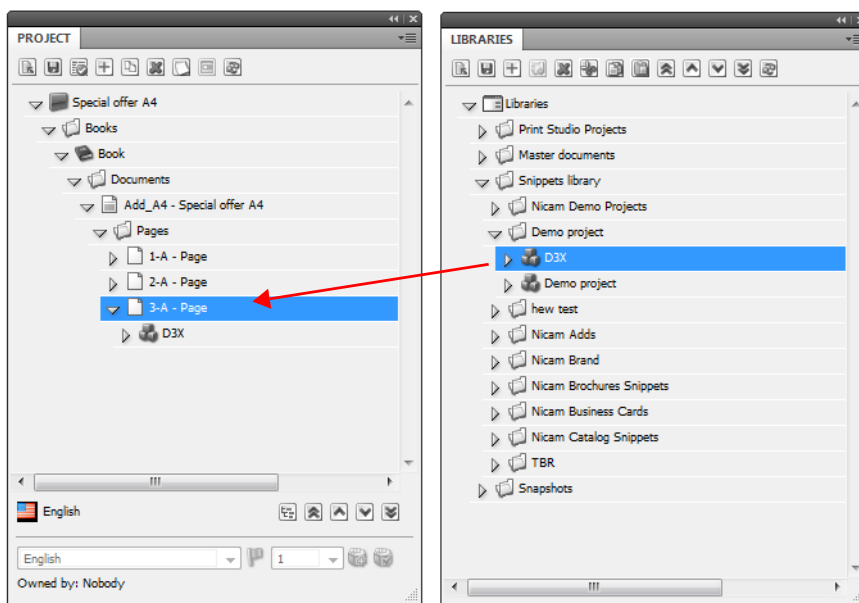
The page snippet is then saved to the selected folder as a new master snippet where it is available for later usage.

## 5.5 Using Master Snippets to Create Page Snippets

To add a page snippet based on a master snippet

1. Select the master snippet of choice.
2. Drag and drop it to the page item of choice.

The snippet is added to the page item and you can then publish it. You can adjust the snippet without changing the master snippet that was used to create the new snippet.



## Chapter 6

# The Templates Panel

The **Template** panel shows templates as they are available in Sitecore CMS. You can use the templates and in particular the template field items to create snippets, as described in previous sections of this document. The **Template** panel allows you to create new templates and you can use a template to create new content items.

This chapter describes how you create new folders and templates.

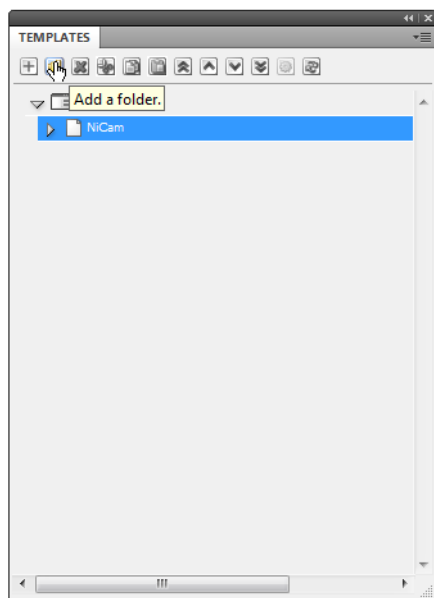
This chapter contains:

- Creating New Folders
- Creating New Templates and fields

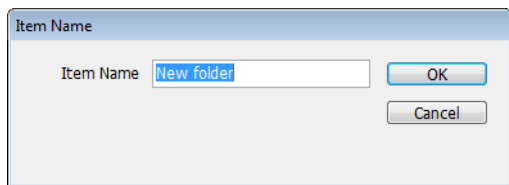
## 6.1 Creating New Folders

To create a new folder in the template section:

1. Open the **Template** browser.
2. Select the folder to which you want to add the folder.
3. Click the **Add a folder** button:



The **Item name** dialog box is displayed:



4. Enter the name of the new folder.
5. Click **OK**.  
The new folder is created.
6. Click the **Refresh** button to refresh the tree.

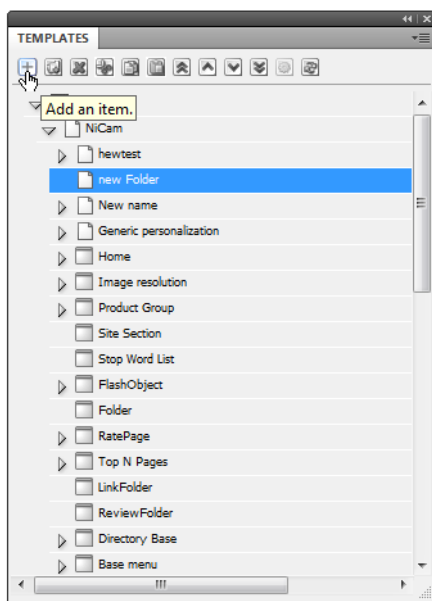
## 6.2 Creating New Templates and fields

**To create a new template**

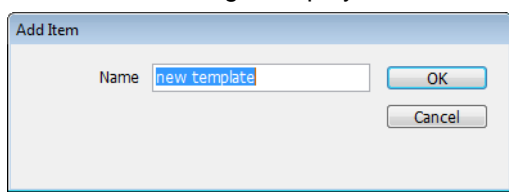
1. Select the folder where you want to create the template.



2. Click the **Add Item** button:

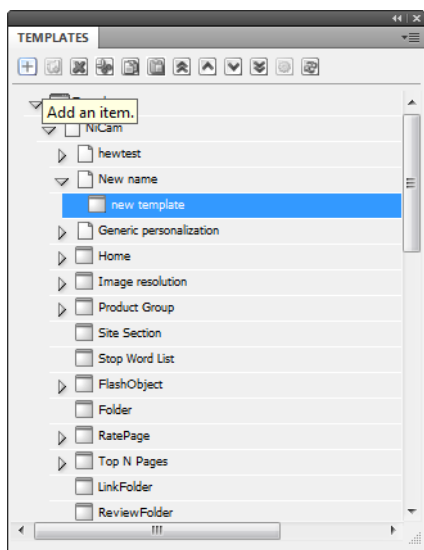


The add item dialog is displayed:



3. Enter the name of the new template item.
4. Click **OK**.
- The new template item is created.
5. Click the **Refresh** button to refresh the tree.
6. Select the new template.

7. Click the **Add item** button to add a template section:

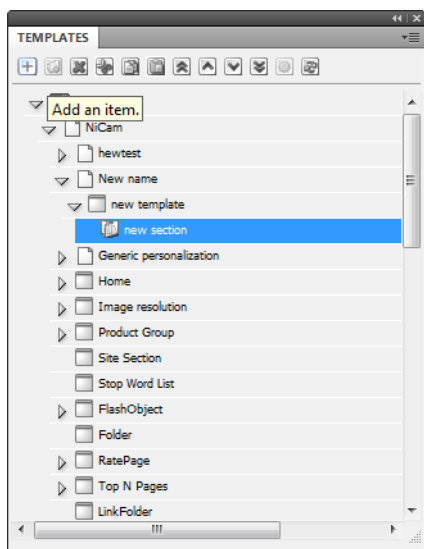


The **Add item** dialog box is displayed.

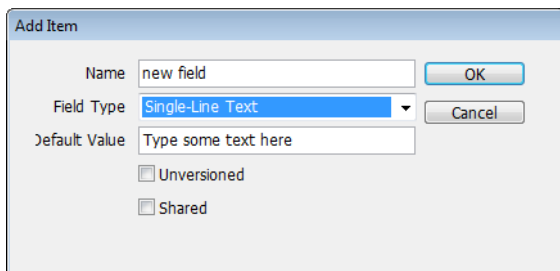
8. Enter the name of the new template section item.
9. Click **OK**.

The new template section is created.

10. Click the **Refresh** button to refresh the tree.
11. Select the new template section.
12. Click the **Add item** button to add a template field to the selected section:



The **Add item** dialog box is displayed:



13. Enter the name of the new field item.
14. Select the field type (for example Single-Line text) and enter some default text in the default value text box. If required, select the **Unversioned** and **Shared** check boxes.
15. Click **OK** to create the field.
16. Click the **Refresh** button to refresh the tree.

**Note**

You can set a default image for an image field by dragging an image item from the **Media library** tree to the image field.

**Note**

**Unversioned** means that the value of the field is shared across all versions. **Shared** means that the value of the field is shared across all language versions.

**Note**

The field types displayed depend on the Sitecore CMS settings. Ask your administrator if other field types are required.

## Chapter 7

### The Content Panel

The **Content** panel shows the content structure and items as they are available in Sitecore CMS. You can use the content items to assign items to snippets as described earlier in this document. The Content panel also allows you to create new items.

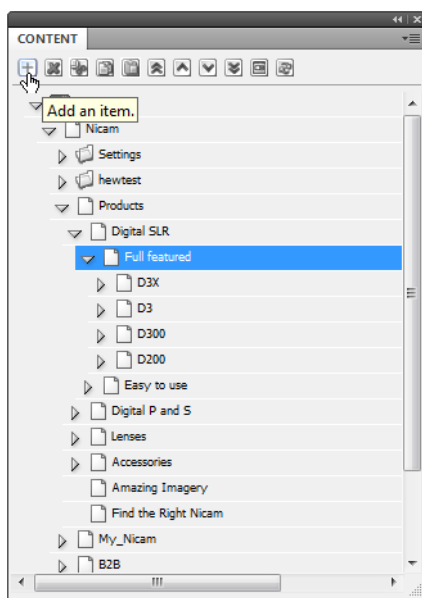
This chapter contains:

- Creating New Content Items Using Insert Options.
- Creating New Content Items Using the Template Browser.
- Locating Templates for Content Items.

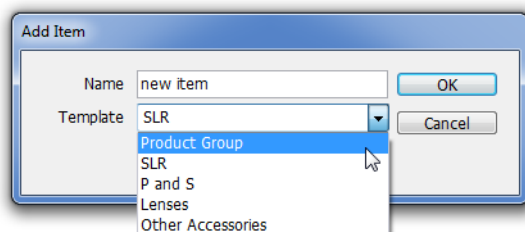
## 7.1 Creating New Content Items Using Insert Options

To create a new content item using the insert options as defined in the Sitecore CMS:

1. Open the **Content** browser.
2. Select the item to which you want to add the new item.
3. Click the **Add item** button:



The **Add item** dialog box is displayed:



4. Enter the name of the new item.
5. Select the template type from the **Template** drop down list.
6. Click **OK** to create the item.
7. Click the **Refresh** button to refresh the tree.

### Note

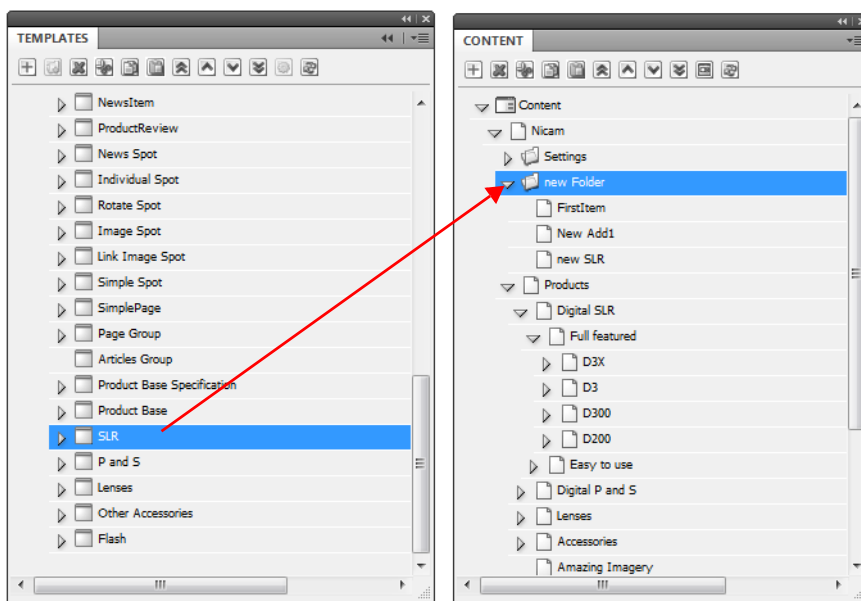
The template types correspond to the list of “insert options” as set in the default values of the corresponding data template in the Sitecore CMS. Ask your administrator for more information.

## 7.2 Creating New Content Items Using the Template Browser

To create a new content item using the templates from the **Template browser**:

1. In the **Template browser**, select the item you want to use.

2. Drag the template to the item to which you want to add the new item.

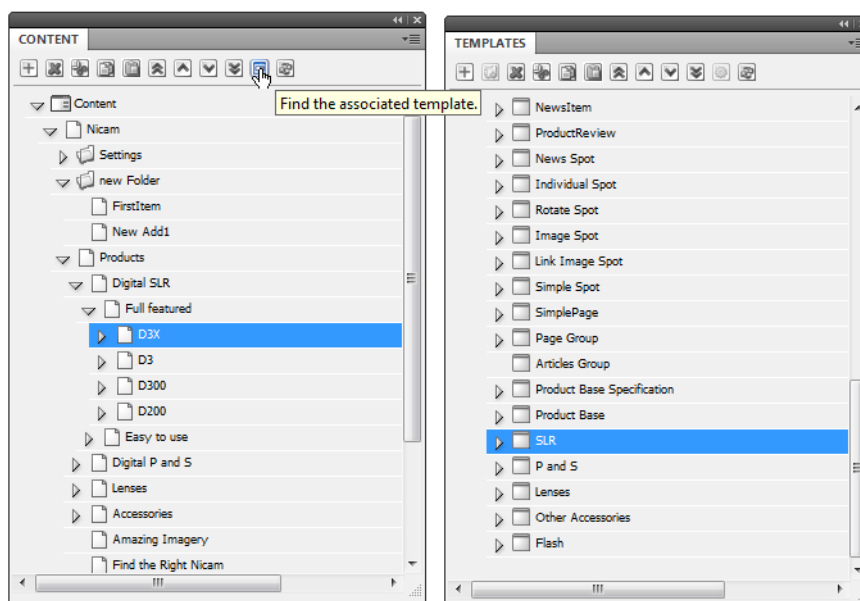


The new item is created using the selected template. You can then use it to assign to a snippet and work with the contents.

## 7.3 Locating Templates for Content Items

To locate the used template for a content item:

1. Open both the **Content browser** and **Template browser** panels.
2. Select the content item you want to use.
3. Click the **Find template** button:



If the template is available and accessible, the template is located and selected in the template browser.

## Chapter 8

# Using the Media Panel

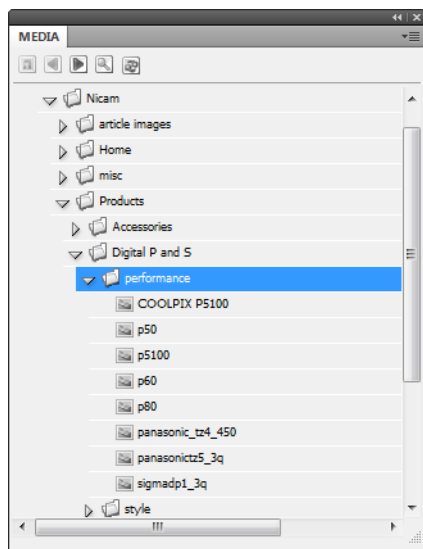
The **Media** panel shows the Sitecore media library and image items as they are available in the media library.

This chapter contains:

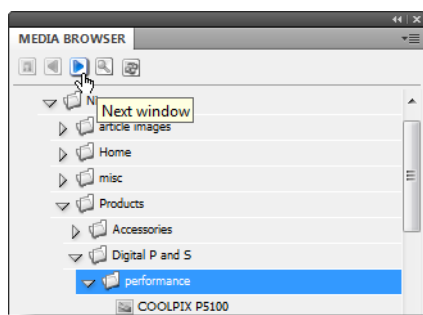
- Browsing the Media Library
- Image Caching
- Placing Images from the Media Library
- Adding Image Items to Snippets by drag and drop
- Re-assigning Image Items
- Searching for Images

## 8.1 Browsing the Media Library

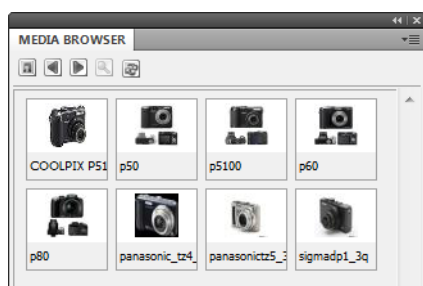
The **Media** panel shows the media library. You can browse through the various folders and the contents (media items) of the various folders. To show the items inside a folder, simply open the folder. As you can see in the following example, the media items will be shown in the structure as items:



To show the contents of the folder with thumbnails, click the **Next window** button:

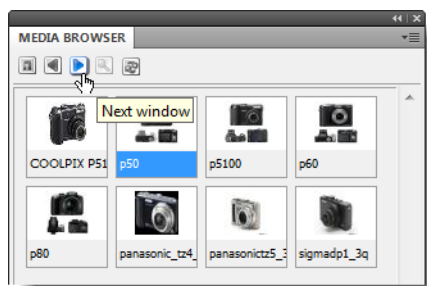


The media items are shown in a list of thumbnails:

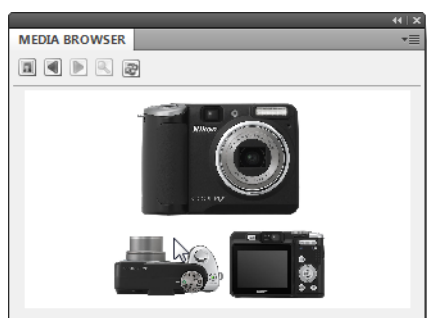




To show a larger preview, select the thumbnail of choice and click the **Next window** button again:

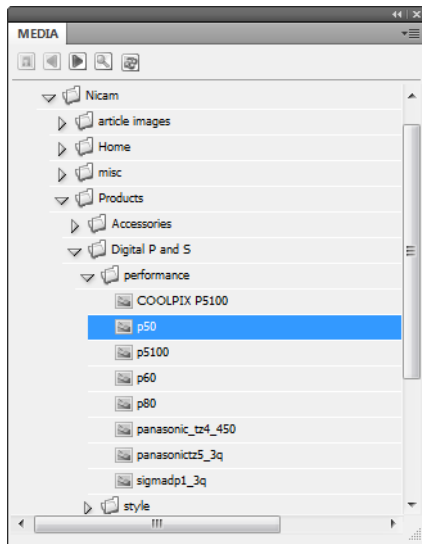


The selected image is shown:



You can also select the media item in the tree and show the preview from that item.

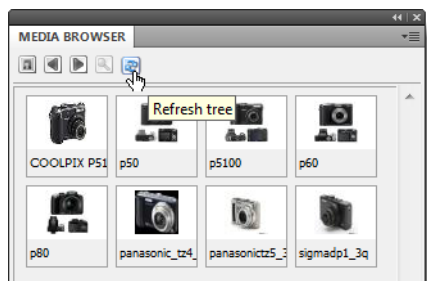
1. Select the item in the tree.



2. Click the **Next window** button to show the preview of the selected item.

## 8.2 Image Caching

The used images are cached on a local hard drive in the image viewer sub folder. This speeds up the loading of the images significantly. To empty the cache for a selected media folder, click the **Refresh** button on the thumbnails list window.

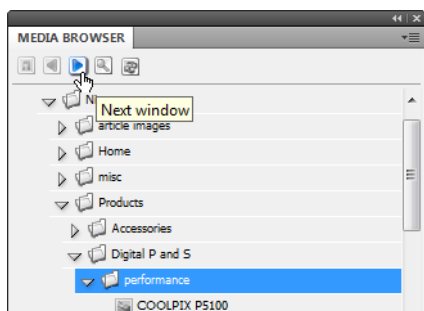


All cached files from the selected media folder are then deleted. Please note that it may take a bit longer to reload the files again because the cache needs to be re-created.

With the large preview window selected, you can also clear the cache of that specific image.

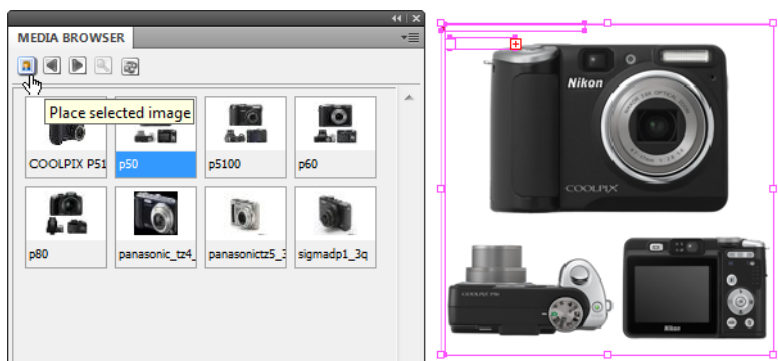
## 8.3 Placing Images from the Media Library

1. Select the folder containing the image item that you want to use.
2. Click the **Next window** button:



The selected folder is opened and the available images are displayed.

3. Select the image of your choice in the list of thumbnails.
4. Click the **Place selected image** button:

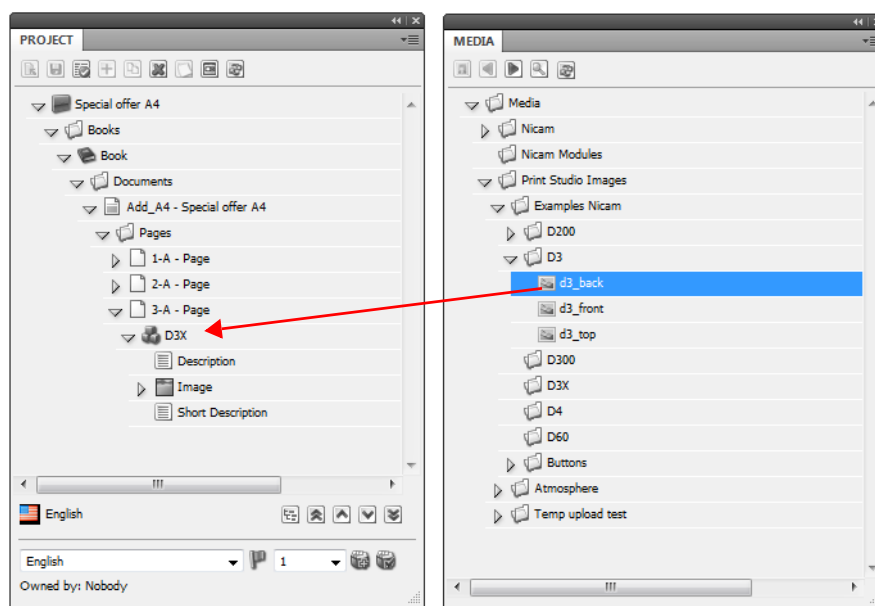


5. Open the **Libraries browser**.
6. Select the snippet item *and* the image frame.
7. Click the **Add** button.

## 8.4 Adding Image Items to Snippets by drag and drop

To assign an image from the **Media** panel to a snippet:

1. Select the item of choice in the **Media** panel tree structure.
2. Drag and drop the image item to the snippet item of choice:



A new image frame item is added to the snippet with a reference to the selected media item.

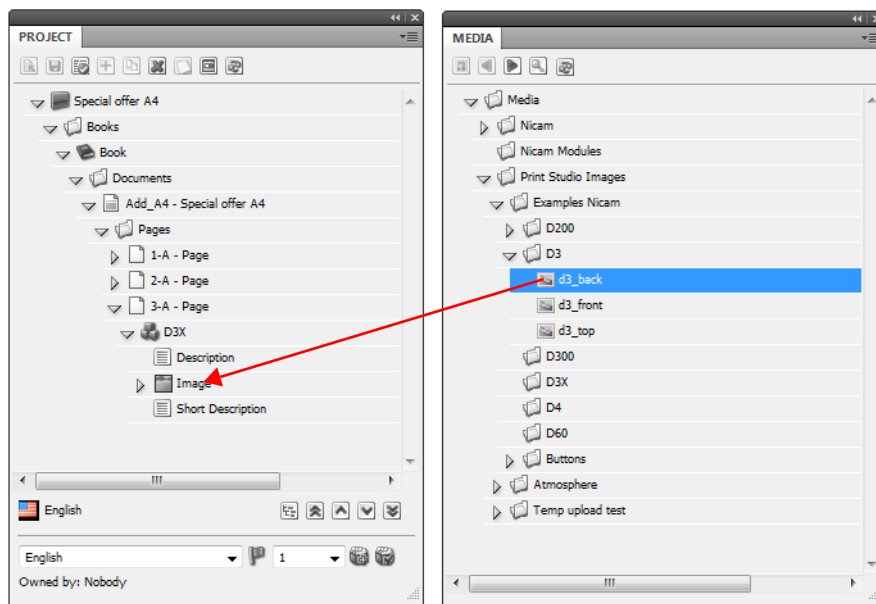
3. Click the **Refresh** button (project panel) to show the structure.

## 8.5 Re-assigning Image Items

To (re-)assign an image item to an existing image frame:

1. Select the item of choice in the **Media** panel tree structure.

2. Drag and drop the item to the image frame item in the **Project** browser:



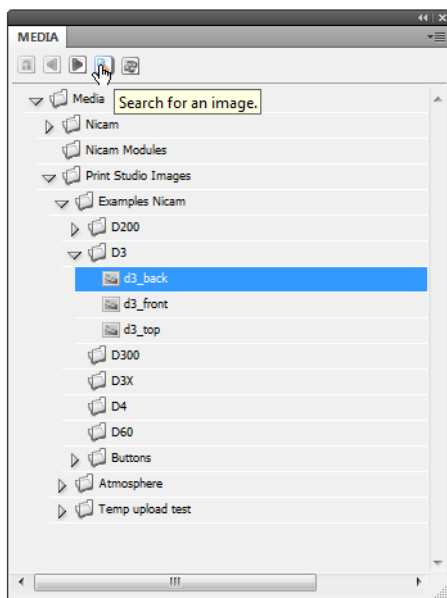
The selected image item is then assigned to the image frame.

3. Click the **Refresh** button (**Project** panel) to refresh the tree structure.

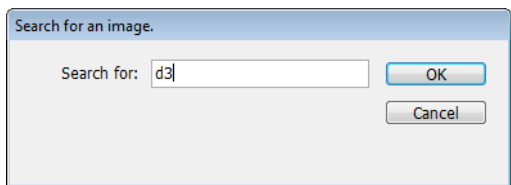
## 8.6 Searching for Images

To search for a specific image:

1. Select the folder from which you want to start the search.
2. Click the **Search image** button:



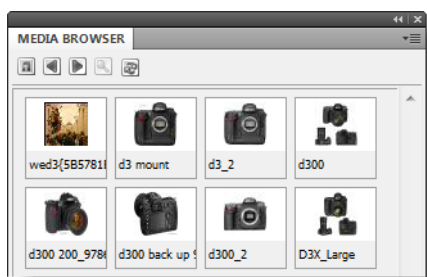
A dialog window is displayed, asking you to enter a description or part of a description of the image you want to search for (for example “d3”).



- 3. Click **OK** to start the search through the selected folder and its child folders.

**Note**  
Depending on the number of times the image is found this search can take some time.

The images that match the search criteria are displayed in the thumbnails browser:



## Chapter 9

# The Extensions Panel

To automate certain parts of the InDesign production, you can use a so-called “script object”. A script object is created by using the C# development language. Consult your administrator on how to create script objects.

Content merge items can be used to create the contents of a text frame with contents from different fields. A content merge can be created in InDesign.

You can use so called “tasks” to extend the functionality of the InDesign connector. It allows you to automate a certain tasks, for example creating a new project and adding some pages or assign a content to all snippets in a document. A task is created in a similar way as a script.

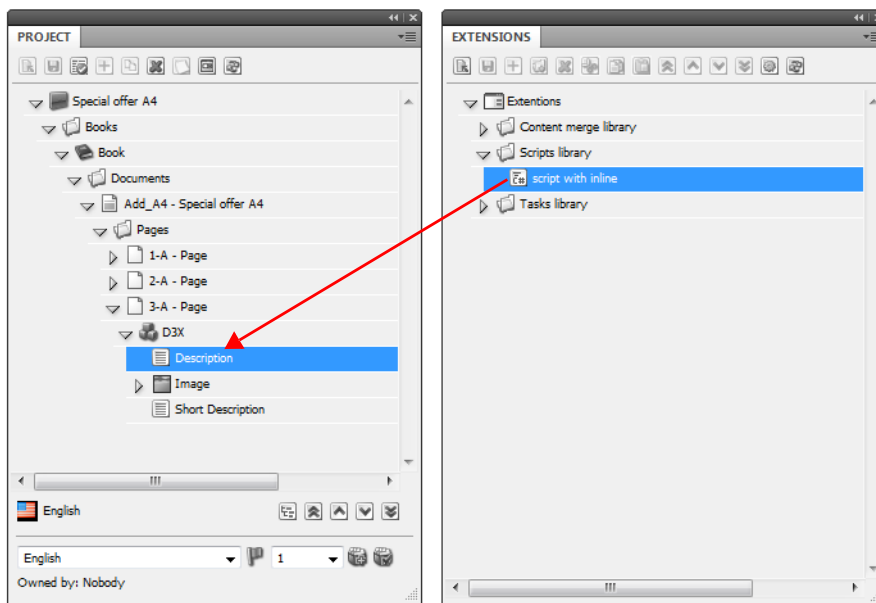
This chapter contains:

- Assigning Scripts
- Assigning Content Merge Items
- Executing Tasks
- Creating Content Merge Items
- Nesting Content Merge Items
- Inserting Inline Images

## 9.1 Assigning Scripts

You can assign a script item to a document, pages folder, page, snippet, text frame or image frame item. To assign a script to a selected item (for example a text frame):

1. Select the script item from the **Extensions** panel.
2. Drag and drop it to the item of choice in the **Project** tree:



### Note

You can assign one or more scripts to a text frame.

## 9.2 Assigning Content Merge Items

You can assign a content merge item to a text frame only.

1. Select the content merge item from the **Extensions** browser.
2. Drag and drop it to the text frame item of choice in the **Project** tree:

### Note

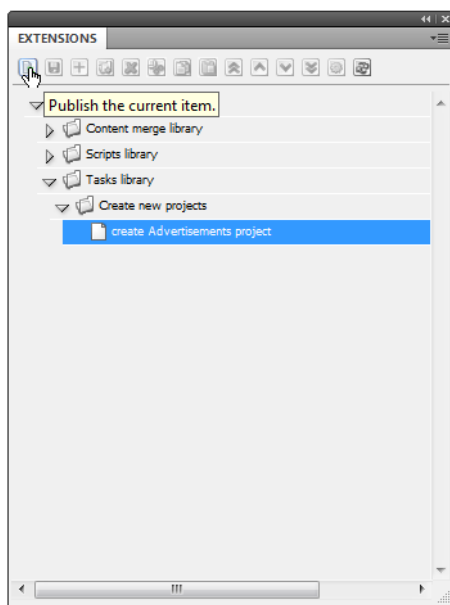
You can assign one or more content merge items to a text frame.

## 9.3 Executing Tasks

To execute a certain task:

1. Select the task item you want to execute.

2. Click the **Execute task** button:

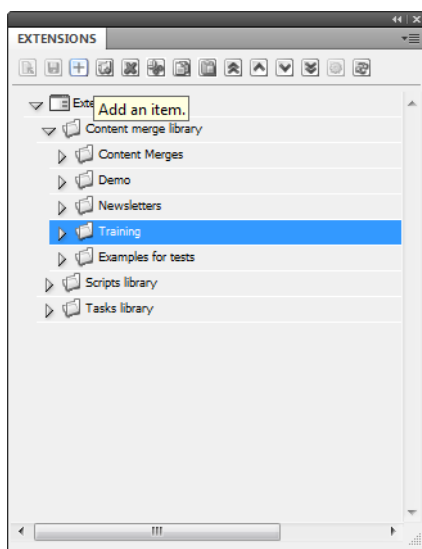
**Note**

Depending on the functionality of the task, you may see different user notifications. It may also be required to select an item in one of the other panels as well.

## 9.4 Creating Content Merge Items

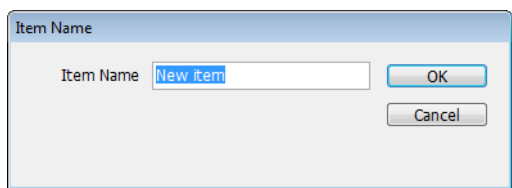
Content merge items allow you to fetch contents from several items and fields and merge those contents into one single text frame in an InDesign production. To create a new content merge item:

1. Open the **Extensions** browser.
2. Select the folder where you want to create the new content merge item.
3. Click the **Add item** button:

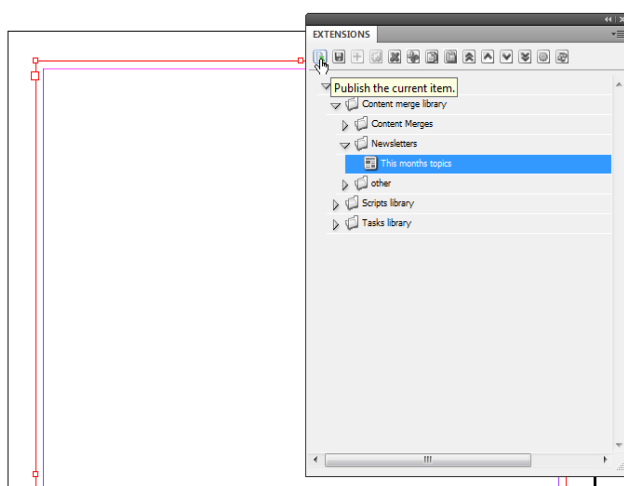




The **Item name** dialog box is shown:



4. Enter the name of the new item.
5. Click **OK**.  
A new content merge item is added to the selected folder.
6. Click the **Refresh** button to refresh the tree structure.
7. Select the new item.
8. Click the **Publish selected item** button:

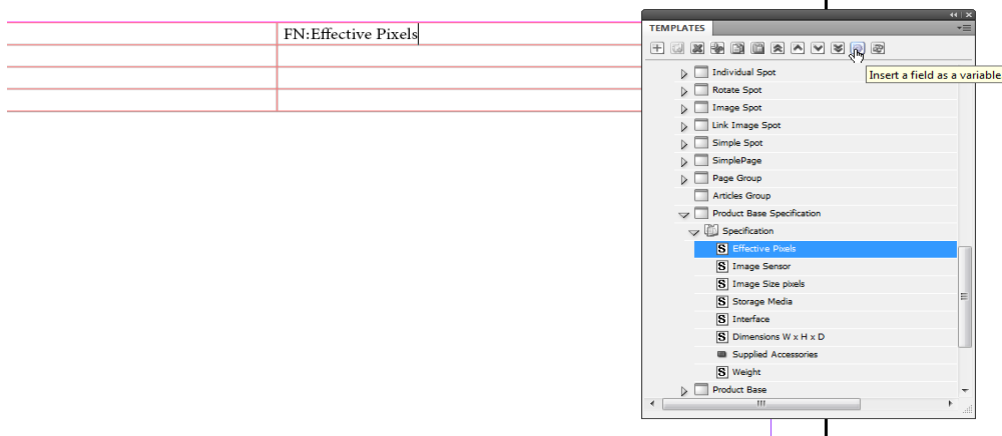


A text frame is created on the page. You can then add the content to the frame that will act as a template for the content merge.

To add variables to the lay-out:

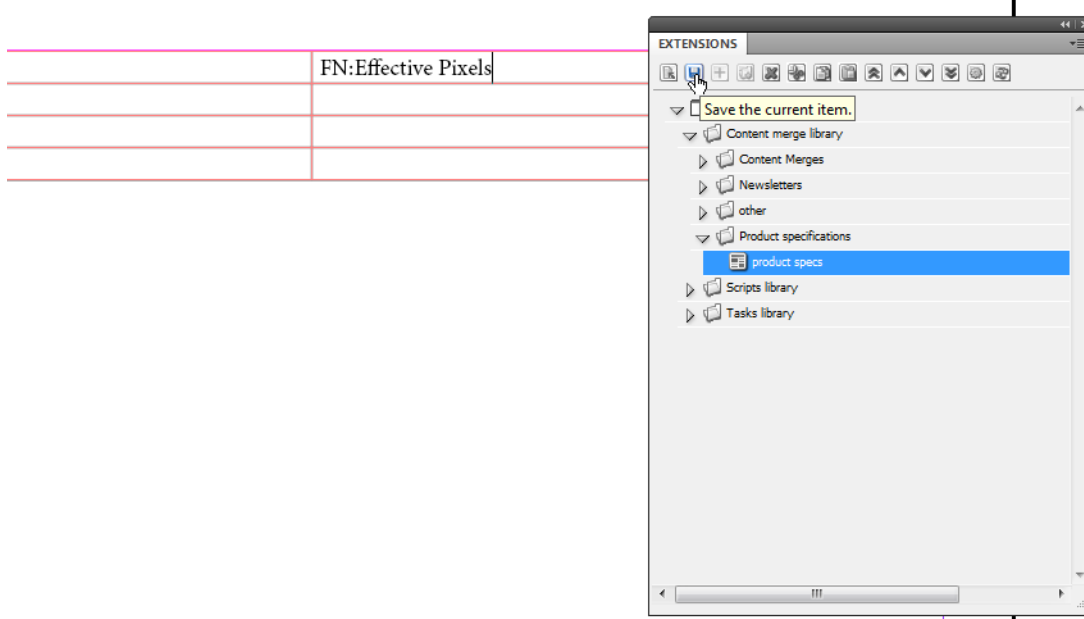
1. Place the cursor at the place where you want to insert the variable place holder.
2. Select the field you want to insert in the **Templates** panel.

3. Click the **Insert variable** button:



A text variable is added to the content indicated by “**FN:Effective Pixels**”.

4. Add as many variables as you need and apply the needed styles until you are satisfied with the way it looks.
5. Switch back to the **Extensions browser** panel
6. Select the content merge item.
7. With the item selected in the tree, click the **Save selected item** button:

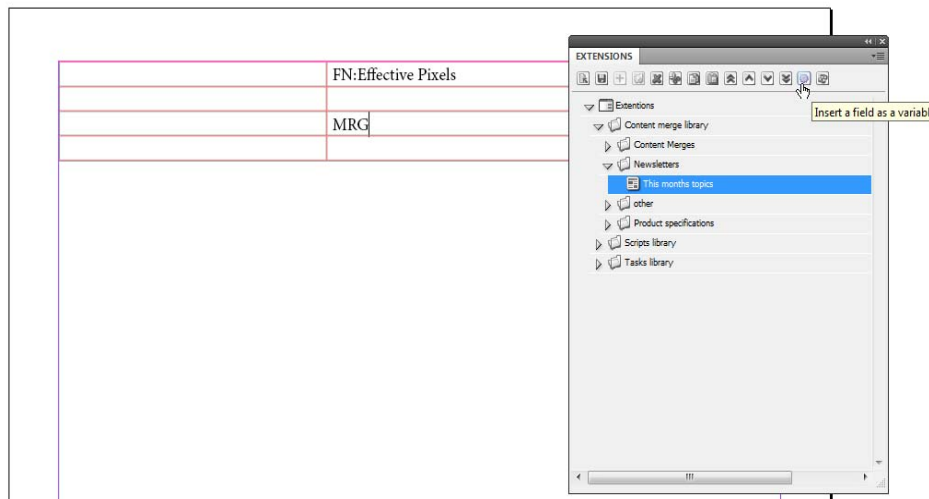


The content merge is saved.

## 9.5 Nesting Content Merge Items

You can also nest content merge items inside a content merge item. This allows you to create subparts and assemble them in an overall merge. For example the contents of a table cell could be created from a separate content merge.

1. To insert a merge item, place the cursor at the position where you want to insert it.
2. Select the merge item in the **Extensions** panel.
3. Click the **Insert variable** button:



A new text variable is inserted indicated by "MRG". When published, the contents of the cell is created from the inserted content merge item.

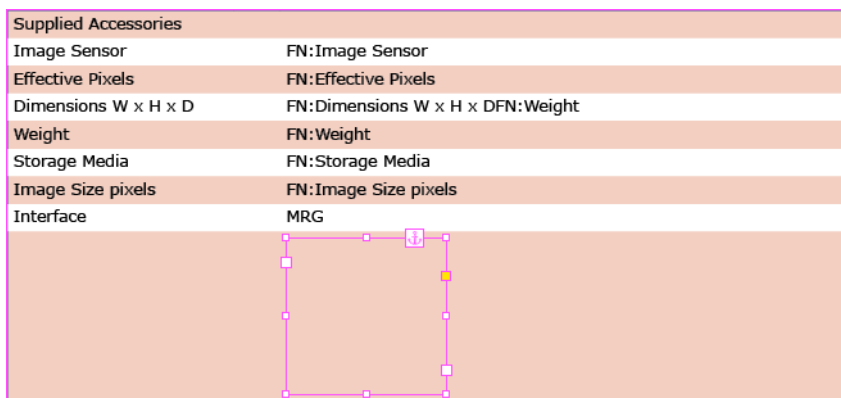
**Note**

You can also insert script item as a nested object in a content merge. Select the script item in the tree and click the **Insert variable** button.

## 9.6 Inserting Inline Images

To insert an inline image as part of a content merge:

1. Create an anchored frame of "text" type at the desired place, for example:



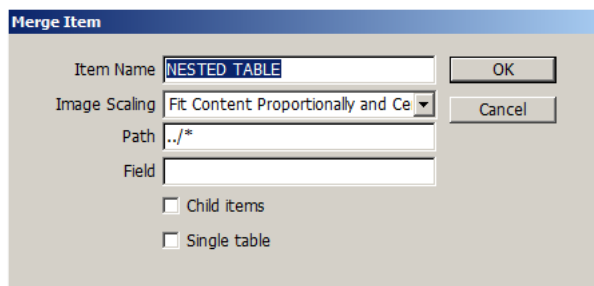
2. Then place the cursor inside the anchored frame.

You can insert text fields to publish the contents of a text field inside the anchored frame. You can also insert an image field inside the anchored frame to publish the selected image.

## 9.7 Specific Settings

In principle, a content merge is always executed against the content item assigned to the snippet which the text frame is part of. However, the merge item allows you to assign a content item in different ways.

To adjust the settings of a content merge item, select the item and right-click. The following dialog box is displayed:

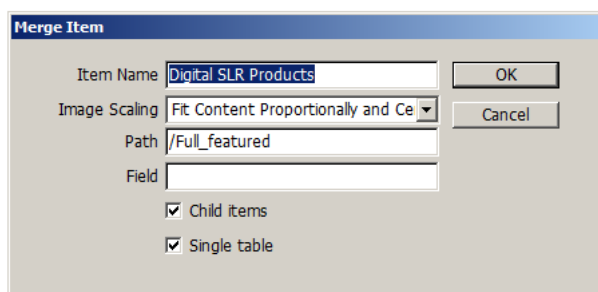


The **Merge Item** dialog box contains the following fields:

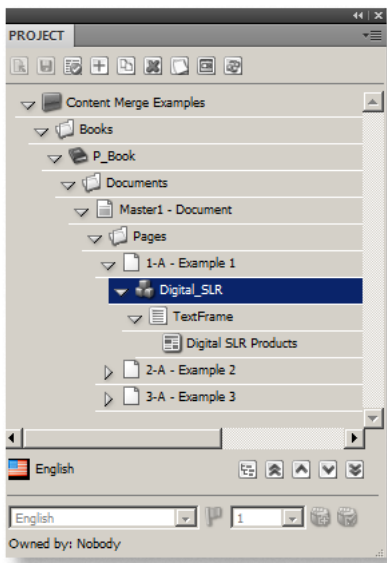
- **Item Name** - the name of the content merge item.
- **Image scaling** - in this field, you can select the scaling method that will be used for the images inside the content merge.
- **Path** - you can define a path to an item part of the substructure of the current item.
- **Field** - in this field you can fetch the value of a certain field (for example a tree list) and use the related items in that field to publish a structure. You can also drag and drop field items from the Template browser to the content merge item to set the field.
- **Child items** - this check box determines whether the child items will be published. When selected, all items are published.
- **Single table** - this check box determines whether the items will be published in a single table (selected) or in separate tables for each item (cleared).

### Example 1

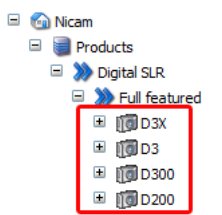
1. Right-click the item to adjust the settings. The following dialog box is displayed.



2. The current item is the “Digital\_SLR” product item (the item assigned to the snippet).



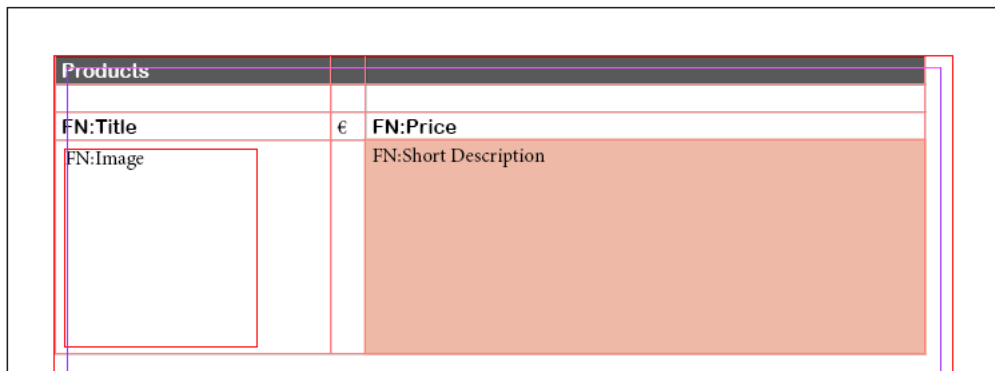
3. All the product items of the Full featured item need to be published (as below).







4. In this case, the path must be: “/Full\_featured” (item name in the content).

**Note**  
 Make sure to select the item name. When you use the display name, no result is published. The path can also have the value of the GUID item (ItemID). In that case, the GUID is used as the current item.

5. The following content merge is used in this example:



- As you can see in the following screenshot, all product items of the Full featured item are published into one table.

| Products |   |
|----------|---|
| D3X      | € 7995<br> Flagship 24.5-megapixel FX-format D-SLR—meticulously engineered for professionals whose work demands extreme resolution, file size and image fidelity |
| D3       | € 4500<br> The professional choice - for the demanding photographer.   |
| D300     | € 995<br> Professional class features, Prosumer class price  |
| D200     | € 675<br> The true workhorse!   |

### Example 2

Imagine that you want to publish all accessories of a product. Right-click the item. The following dialog box is displayed.

**Merge Item**

Item Name:  OK

Image Scaling:  Cancel

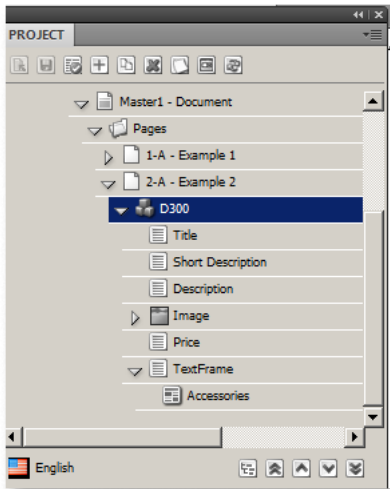
Path:

Field:

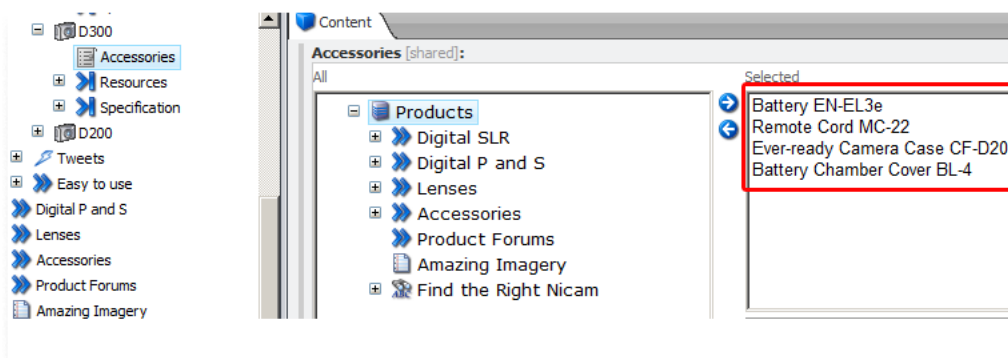
Child items

Single table

1. The current item is the “D300” product item (the item assigned to the snippet).



2. All the accessories items child of the product item need to be published.




3. In this case, the path must be: “/Accessories” (item name in the content). The following content merge is used in this example:

| Accessories |          |   |          |
|-------------|----------|---|----------|
| FN:Image    | FN:Title | € | FN:Price |

- The result is shown in the following image. The product item D300 accessories are published in one table.





D300

Professional class features, Prosumer class price



The D300 defines a new class of compact professional SLR, incorporating groundbreaking technologies and performance of the D3 into a compact DX format body. The 12.3 megapixel CMOS sensor features a self-cleaning dust removal unit and delivers resolution suitable for commercial and stock photography. The EXPEED image processing engine supports a class-leading 6fps at up to 3200 ISO, and delivers superb tonal gradation. Its advanced Scene Recognition System produces superior exposures and is complimented by Nikon's next-generation 51-point AF system, which offers broad coverage and high sensitivity in low light. Selectable Picture Controls streamline in-camera image processing, saving time in post-production, and the high definition 3-inch LCD screen supports two Live View modes plus a HDMI video output. Responsive, rugged and light, the D300 offers new levels of performance for pros on a budget.

995

| Accessories   |                                |      |
|---|--------------------------------|------|
|    | EN-EL3e                        | € 23 |
|    | Remote Cord MC-22              | € 14 |
|   | Ever-ready Camera Case CF-D200 | € 39 |
|  | BL-4                           | € 8  |

**Note**

Do NOT nest the same merge items in each other! That will create an endless loop of nested structures.



## Chapter 10

### Menu Settings

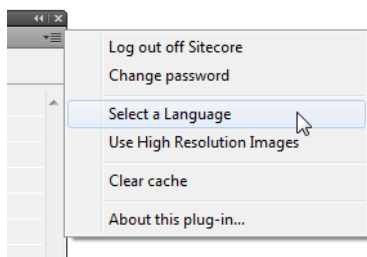
This chapter describes how you control certain settings from the Panel Menu.

This chapter contains:

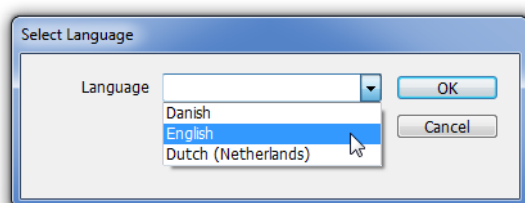
- Choosing Language.
- Loading Text Frames With Different Languages and/or Versions.
- Using Low Resolution or High Resolution Images.
- Clearing the Cache.

## 10.1 Choosing Language

1. To choose the language select the **Language** item from the panel menu:



The **Select language** dialog box is displayed. The languages correspond with the languages in the Sitecore CMS:



2. Select the language of your choice and click **OK**.

The selected language is loaded, meaning that when publish or create new items, the selected language is used. The selected language is indicated in the interface by a flag and the name of the language, placed at the bottom left of the project panel.

### Note

If the fields, for example the width of a text frame are shared, the width is the same for each language. If the width field is set to non-shared, the width can be set for each language.

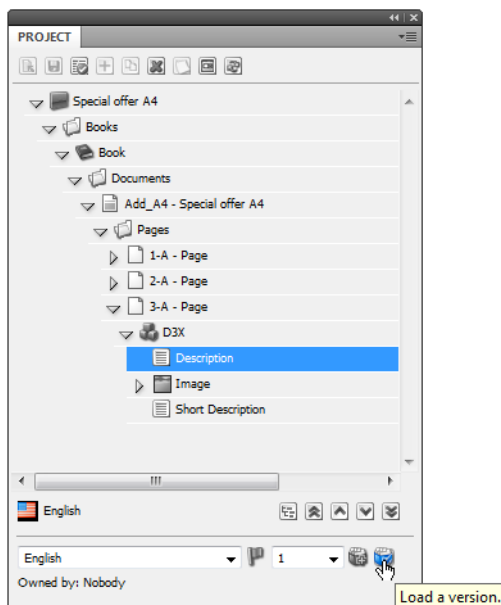
## 10.2 Loading Text Frames With Different Languages and/or Versions

An item (text frame, image frame, and so on) can be created with different languages and versions. This allows you, for example, to create a text frame with different positions and/or sizes or any of the other attributes that are set to non-shared/versioned in Sitecore.

You can load a certain version of an item in a certain language in this way:

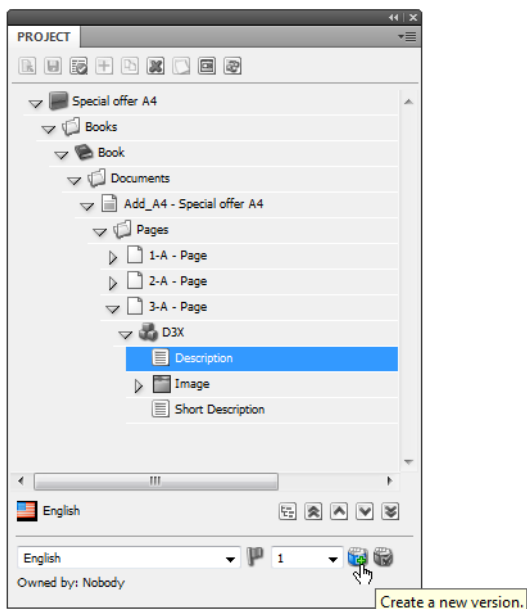
1. Select the item that you want to load in the tree view.
2. Select the language that you want to load from the **Languages** drop-down list.
3. Select the version that you want to load from the **Versions** drop-down list.

4. Click the **Load selected version** button. The content is loaded in the selected language in the text frame of the selected version:



**To create a new version of the selected item**

1. Select the item for which you want to create a new version in the tree.
2. Select the language you want to use from the **Languages** drop-down list.
3. Click the **Create new Version** button:

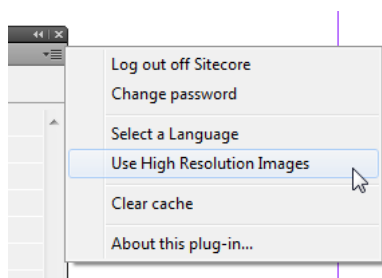


### 10.3 Using Low Resolution or High Resolution Images

When working online, you can only use low resolution images which are extracted from the Sitecore media library and then downloaded to InDesign. However, when working on a local area network (LAN)

with access to high resolution images (stored on a file server) you can also use the high resolution images without the need to run a server based production setup. Consult your supplier on how to set up such a production environment.

To switch to high resolution images on the desktop, select **Use High Resolution Images** from the panel menu. To switch back to low resolution images, select **Use Low Resolution Images** from the panel menu.



## 10.4 Clearing the Cache

To speed up the process of downloading information from the Sitecore server to the InDesign desktop client, data is cached. That is similar to caching with your web browser. To clear the cache, select **Clear cache** from the panel menu.

## Chapter 11

### Creating Snapshots

To create a preview image of a snippet or page, you can use the special Create snapshot function in the InDesign connector. A preview image is created and this preview can be used in front end applications such as the Print Studio Editor to show a preview of a snippet.

This chapter contains:

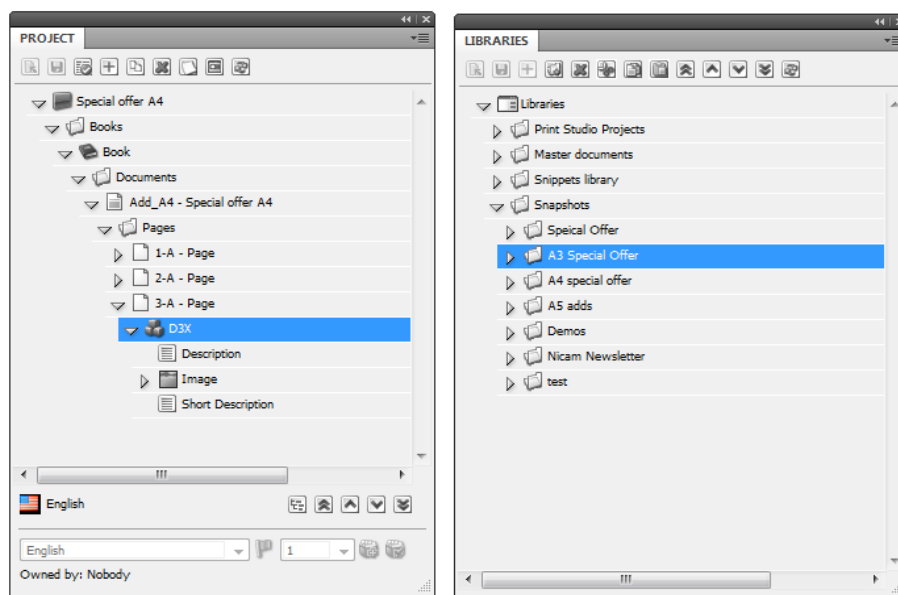
- Creating Snapshots.

## 11.1 Creating Snapshots

To create a snapshot:

1. Publish the items you want to use for the snapshot.
2. Select the item you want to create the snapshot for.
3. Drag and drop the item to a snapshots folder in the **Snapshots** library section.

A new snapshot item is created from the page as published, and this item is referenced to the selected snippet item.



You can create snapshots from document, page and snippet items.

To create a snapshot of a master grid or master snippet item:

1. Publish the item (master snippet or master grid).
2. With the master snippet or master grid item selected in the tree (Libraries panel), click the **Copy** button.



3. Select the snapshots folder of choice (Libraries panel) and click the **Paste** button



### Note

You can create any page layout as a snapshot. Basically, a snapshot is created of the page as it is and an image is created from that.

## Chapter 12

# Using the Workbox

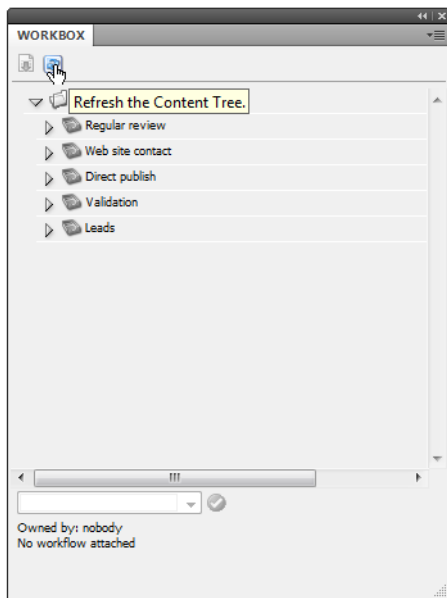
This chapter contains:

- Introduction.
- Opening Project Items From the Workbox.
- Using Content Items and Media Items from the Workbox.
- Moving Items to the Next Stage.

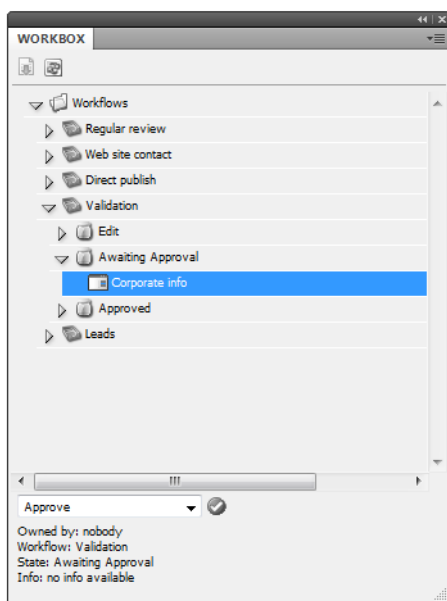
## 12.1 Introduction

Similar to the Sitecore workbox, the InDesign connector also offers a workbox. It shows the InDesign project items that are in a workflow stage and need the attention of the user.

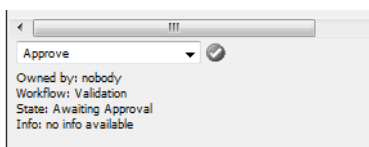
1. To load the workflow items, click the **Refresh** button in the workbox panel:



2. Select an item in a workflow stage:



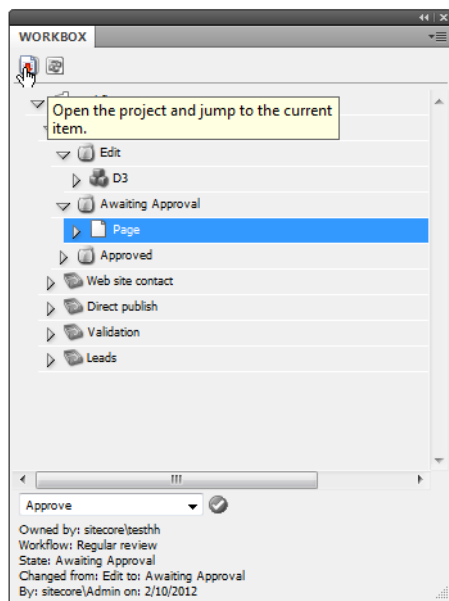
The workflow info is displayed at the bottom of the panel





## 12.2 Opening Project Items From the Workbox

To work on an InDesign item in a workflow stage, just select that particular item and click the **Open project and jump to selected item** button. The project which the item is a part of is opened in the project panel and the item is selected in the tree.



## 12.3 Using Content Items and Media Items from the Workbox

Content items that appear in the **Workbox** at some state can be used in drag and drop operations, in the same way as described earlier in this manual. That is also the case for media items. For example:

- You can drag and drop a content item to a snippet item to assign the content item to the snippet
- You can drag and drop a media item to an image frame item to assign the image to the image frame.

## 12.4 Moving Items to the Next Stage

To move an item to the next stage in the workflow, select the command from the drop-down list and then click the **Submit** button:

