

Sitecore InCopy Connector 1.3 User Manual

Editing InDesign Documents with Sitecore CMS

Table of Contents

Chapter 1	Introduction	5
Chapter 2	Starting Up	6
	2.1 Starting the InCopy Connector Plug-in	7
	2.2 Buttons in Sitecore Panels	8
	2.3 The Panel Menu	8
	2.4 Project Structure	9
	2.5 Logging in to Sitecore	10
	2.6 Logging Off	11
Chapter 3	Editing Pages	12
	3.1 Opening Projects from the Libraries Panel	13
	3.2 Opening Projects from the Workbox	14
	3.3 Editing Pages	15
	3.4 Assigning Content Items	17
Chapter 4	Menu Settings	18
	4.1 Selecting a Language	19
	4.2 Using Low Resolution or High Resolution Images	20
	4.3 Clearing the Cache	21
Chapter 5	Using the Workbox	22
	5.1 Introduction	23
	5.2 Opening Project Items From the Workbox	24
	5.3 Using Content Items and Media Items from the Workbox	25
	5.4 Moving Items to the Next Stage	26

Chapter 1

Introduction

This document describes how to use the Sitecore InCopy Connector that can be used to edit InDesign documents created with the Sitecore InDesign Connector. It assumes that you have good knowledge of Sitecore and InCopy.

- **Chapter 1 - Introduction**
- **Chapter 2 - Starting Up**
This chapter briefly describes how you start the Sitecore InCopy Connector plug-in.
- **Chapter 3 - Editing Pages**
This chapter describes the steps involved in opening and editing an InDesign project with the InCopy Connector.
- **Chapter 4 - Menu Settings**
This chapter describes how you control certain setting from the Panel Menu.
- **Chapter 5 - Using the Workbox**
This chapter describes how to work with the workbox.

Chapter 2

Starting Up

This chapter briefly describes how you start the Sitecore InCopy Connector plug-in.

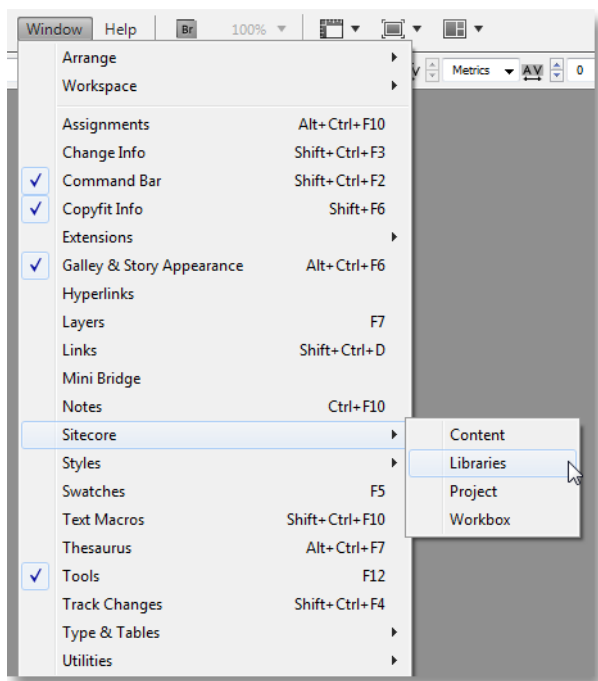
This chapter contains:

- Starting the InCopy Connector Plug-in
- Buttons in Sitecore Panels
- The Panel Menu
- Project Structure
- Logging in to Sitecore
- Logging Off

2.1 Starting the InCopy Connector Plug-in

To start the plug-in:

1. In InCopy go to **Window, Sitecore** and select the panel you want to work with:










There are four panels:

- **Project** panel — this panel is used for working on the InDesign projects.
- **Content** panel — this panel gives access to the contents repository.
- **Libraries** panel — this panel gives access to all InDesign library items.
- **Workbox** panel — this panel shows the workflow stages and items in the workflow.

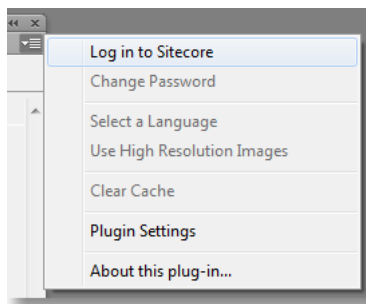
2.2 Buttons in Sitecore Panels

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

Button	Description	Panels			
		Project	Content	Libraries	Workbox
	Publish selected item	X			
	Save selected item	X			
	Refresh	X	X	X	X
	Open item				X
	Check out	X			
	Check in	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.

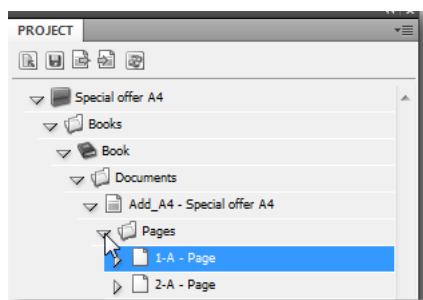
2.4 Project Structure

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 contain page items, for example text frames, images, rectangles, and so on, which correspond to InDesign objects.

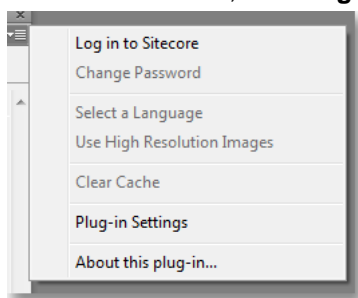
Open the project tree by clicking the nodes on each level.



2.5 Logging in to Sitecore

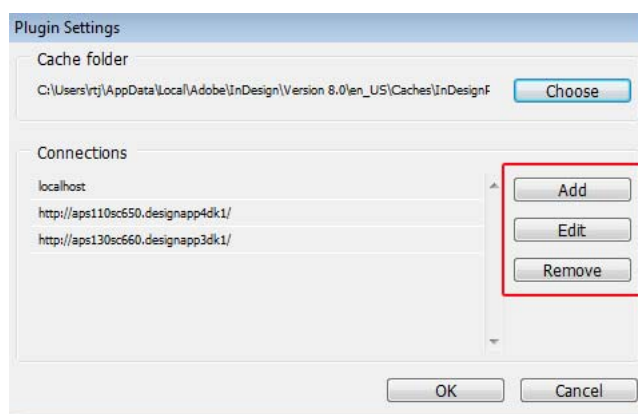
To log in to Sitecore:

1. In the **Panel** menu, click **Log in to Sitecore**:



2. Enter a valid username and password using a Sitecore extranet domain user account.
3. Select the URL for the web server and click **OK**.

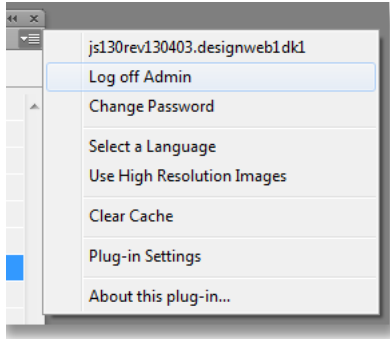
If the web server that you need is not available from the drop-down list, you can add it by clicking **Plugin Settings** from the panel menu. You can add, edit, and remove your web server presets here.



2.6 Logging Off

To log off:

1. In the Panel menu, click **Log off**.



Chapter 3

Editing Pages

This chapter describes the steps involved in opening and editing an InDesign project with the InCopy Connector.

This chapter covers:

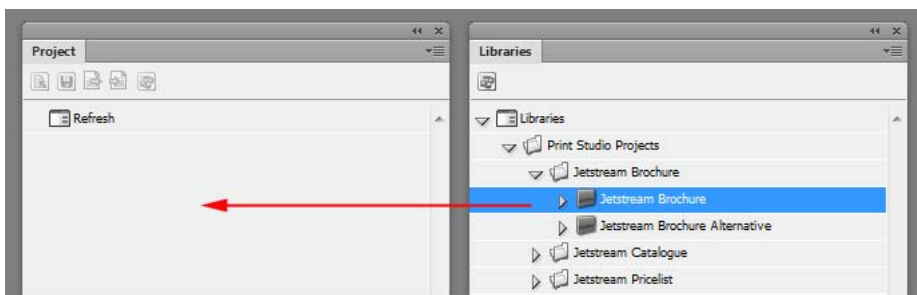
- Opening Projects from the Libraries Panel
- Opening Projects from the Workbox
- Editing Pages
- Assigning Content Items

3.1 Opening Projects from the Libraries Panel

To start working on an InDesign project, an existing project needs to be opened in the project panel. A project can be opened from the Libraries panel, or it can be opened through the workbox when an item is passed in a workflow.

To open a project from the Libraries panel:

1. In the Libraries panel, open the **Print Studio Projects** folder.
2. Locate the project you want to open and drag it to the Project panel.



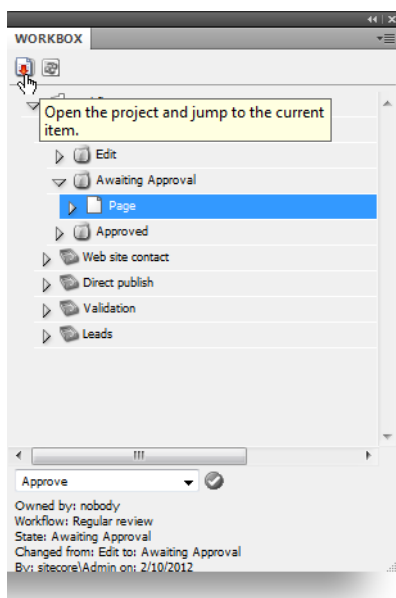
The project is loaded in the project panel and you can start working with it.

3.2 Opening Projects from the Workbox

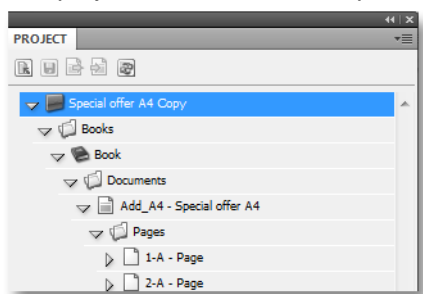
When InDesign project items (for example a document or page) are passed through a workflow scenario to the InCopy user, the item will be displayed in the workbox. You can then open the project from the workbox.

To open a project from the workbox:

1. On the Workbox panel, select the item you want to edit.
2. With the item selected, click **Open project**.



3. The project, which the item is part of, is now opened and loaded in the project panel:



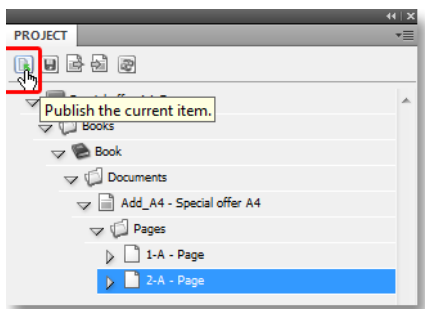
4. You can now start editing the page items in the project.

3.3 Editing Pages

Once the project is loaded, you can start editing pages.

To start editing a page:

1. Select the page item you want to edit in the tree.
2. Click **Publish** to publish the page:

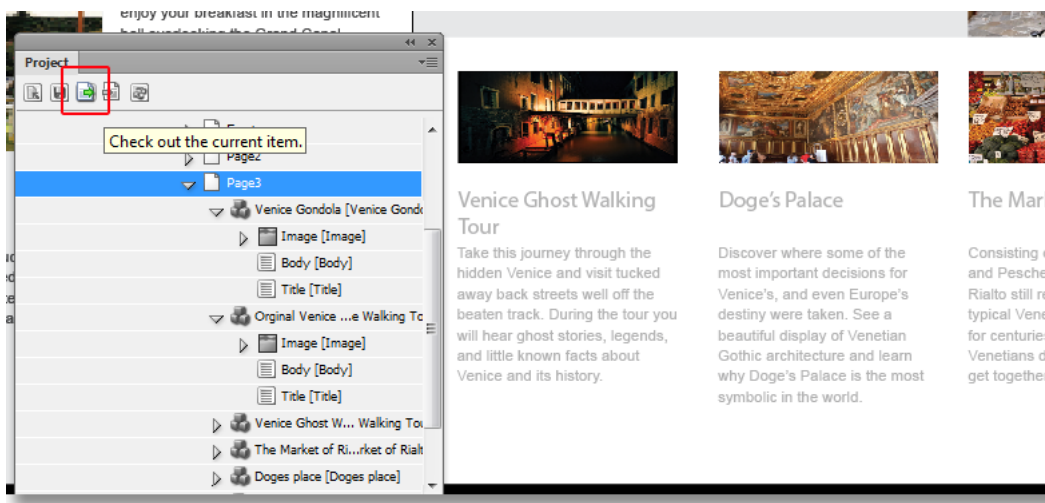


3. The page is published and displayed in InCopy. All page items are locked and cannot be changed until you have checked out the page.

Tip

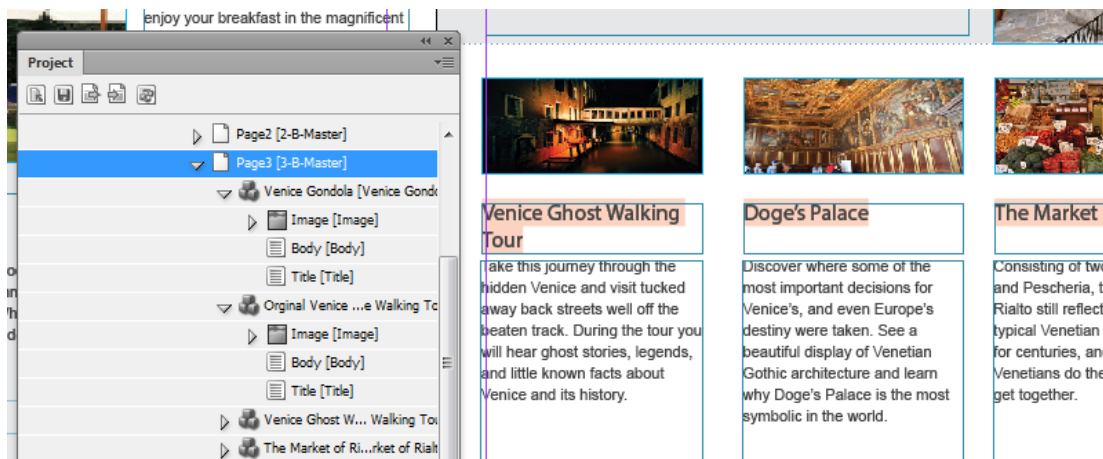
You can double-click a page item in the tree to jump to the corresponding page in InCopy.

4. To check out the page item, click **Check out**.



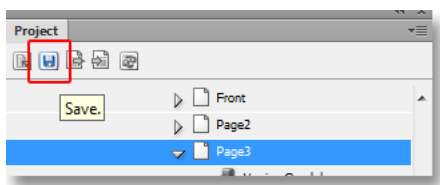
All page items and the related content items (assigned to the page snippets) are locked and can be changed only by the owner until they are checked in again.

- The page is now unlocked and can be edited.



Note
 You can only edit content in InCopy using the InCopy connector. You cannot edit notes and/or change images.

- To save your changes select the page item in the tree and click **Save**.

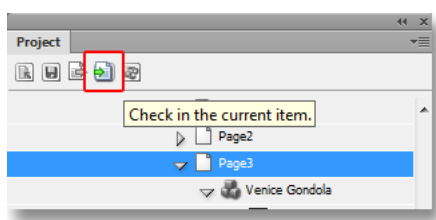


- The save item dialog box displays. Click **OK** to save the changes.

When you finish editing the page, you need to check in the page. This unlocks the page and related content items.

To check in the page:

- Select the page item in the tree and click **Check in the current item**.

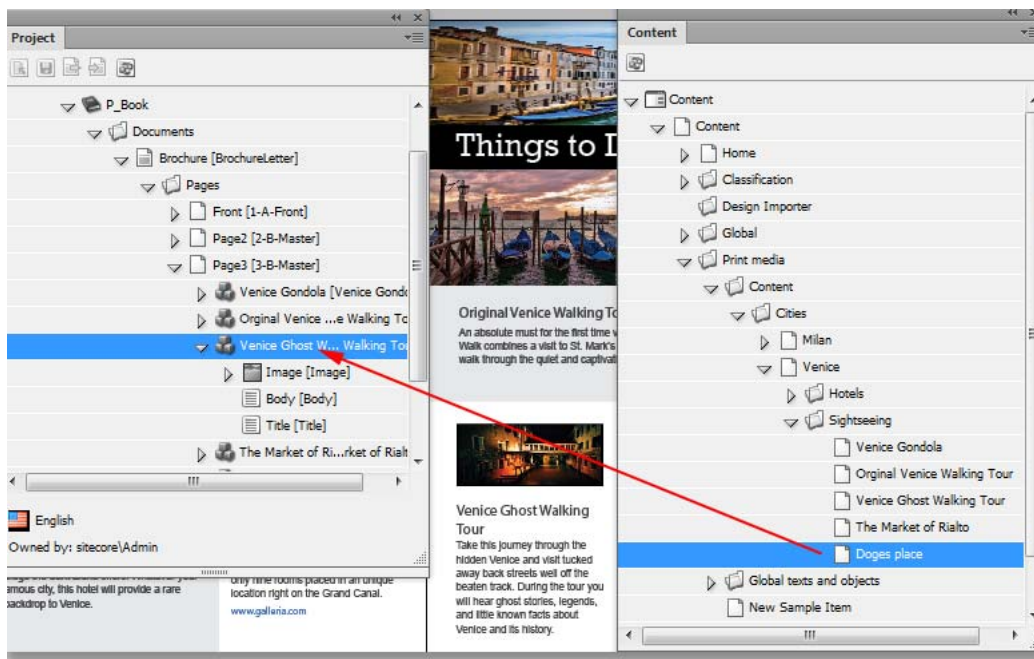


3.4 Assigning Content Items

You can also assign content items to a snippet. This allows to assign a different content item to a snippet and to work with that content instead.

To assign a content item to a snippet:

1. Open the **Content** panel and click the content item.
2. Drag the content item to the project panel and drop it on the snippet item.



You can also drop it on the page item. The content item is then assigned to all snippet items on the page.

3. The content item is now assigned to the snippet.
4. Publish the page to show the results.

Chapter 4

Menu Settings

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

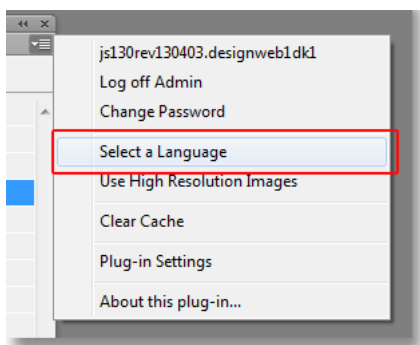
This chapter contains:

- Selecting a Language
- Using Low Resolution or High Resolution Images
- Clearing the Cache

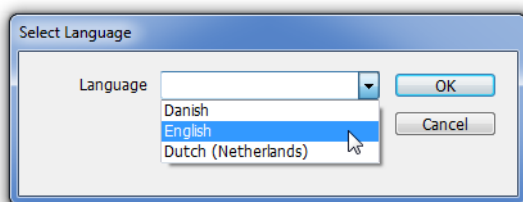
4.1 Selecting a Language

To choose the language:

1. Open the Panel menu and click **Select a Language**.



The **Select language** dialog box is displayed. The languages correspond with the content languages available 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.

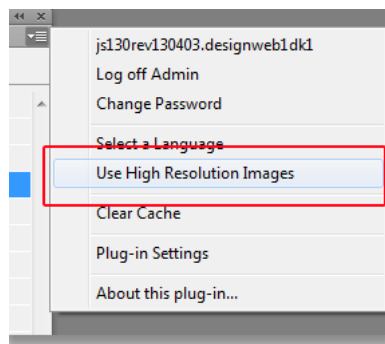
Note

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.

4.2 Using Low Resolution or High Resolution Images

When working online, you can only use low resolution images that 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.



Note

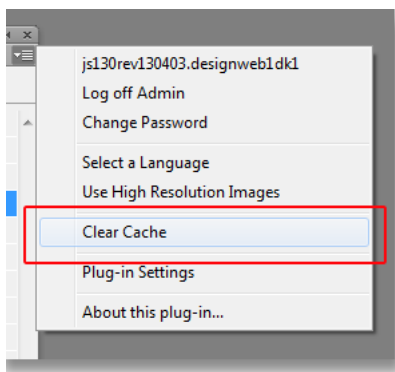
For images without a high or low resolution reference - for example because they are uploaded from the standard Sitecore media library - the cache file is used for both the high and the low resolution image.

4.3 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:

1. Select **Clear cache** from the panel menu.



Chapter 5

Using the Workbox

This chapter describes how to work with the Workbox.

This chapter contains:

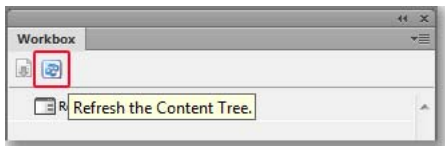
- Introduction
- Opening Project Items From the Workbox
- Using Content Items and Media Items from the Workbox
- Moving Items to the Next Stage

5.1 Introduction

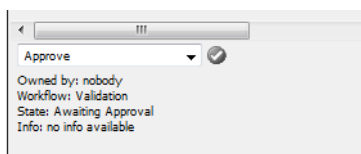
Similar to the Sitecore workbox, the InCopy connector also offers a workbox. It shows the project items that are in a workflow stage and need the attention of the user.

To load the workflow items:

1. Click **Refresh the Content tree** in the workbox panel.

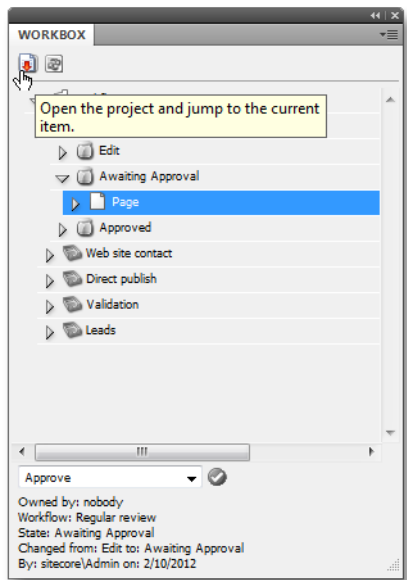


2. Select an item in a workflow stage. The workflow info is displayed at the bottom of the panel



5.2 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.



5.3 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. For example, you can drag and drop a content item to a snippet item to assign the content item to the snippet.

5.4 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:

