

Sitecore InDesign Connector 1.3 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. It explains how to create InDesign output based on content stored in Sitecore CMS. It assumes that you have good knowledge of both Sitecore and InDesign.

- **Chapter 1 - Introduction**
- **Chapter 2 - Starting Up**
This chapter briefly describes how to start the Sitecore InDesign Connector plugin.
- **Chapter 3 - The Libraries Panel**
This chapter introduces the Libraries panel and explains how to use libraries for InDesign projects.
- **Chapter 4 - The Project Panel**
This chapter introduces the Project panel and explains how to work with the Print Studio projects.
- **Chapter 5 - Creating Snippets**
This chapter describes the concept of snippets and explains how to create snippets.
- **Chapter 6 - The Content Panel**
This chapter describes the Content panel and its content items and fields.
- **Chapter 7 - The Media Panel**
This chapter describes how to work with the Sitecore media library.
- **Chapter 8 - The Workbox**
This chapter describes how to work with InDesign project items that are in a workflow stage.

Chapter 2

Starting Up

This chapter describes how to start the Sitecore InDesign Connector plugin.

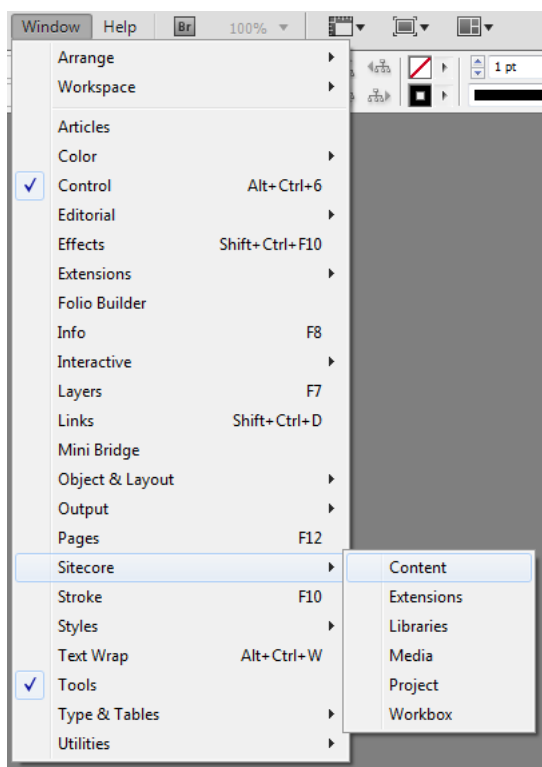
This chapter contains the following sections:

- Starting the Plugin
- The Panel Menu
- Buttons in the Sitecore Panels

2.1 Starting the Plugin

To start the InDesign Connector:

1. Open InDesign.
2. In the **Window** menu, click **Sitecore** and then select the panels you want to work with.

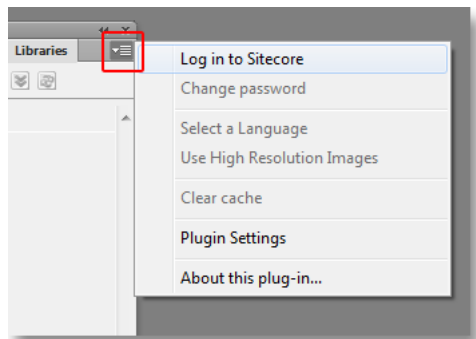


There are six panels available from the **Sitecore** menu:

- The **Content** panel gives access to the content repository.
- The **Extensions** panel gives access to the available extensions. This panel is kept for backward compatibility.
- The **Libraries** panel gives access to all InDesign library items.
- The **Media** panel gives access to image media items.
- The **Project** panel lets you work on the InDesign project.
- The **Workbox** shows the workflow stages and items in the workflow.

2.2 The Panel Menu

The panels provide quick access to commonly used tools and features. The panel menu contains different functions that are common to all panels. Click the upper-right corner of the panel to open the panel menu.

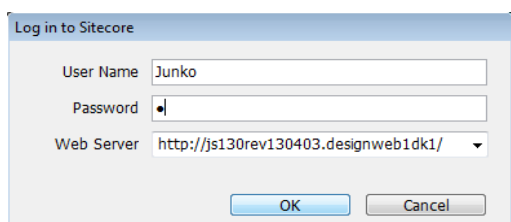


2.2.1 Logging in to Sitecore

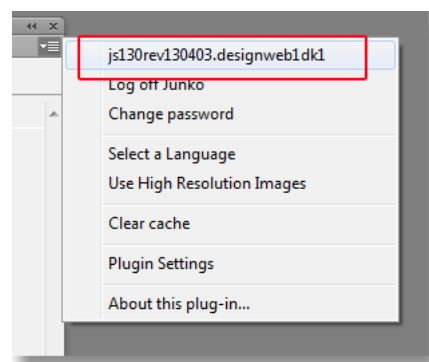
When you log in to Sitecore for the first time, you need to set up the web server connections. Go to *Adding, Editing, and Removing Web servers* to learn more about setting up web server connections.

To log in to Sitecore:

1. Open to the panel menu and click **Log in to Sitecore**.
2. Enter your username and password and select the web server that you want to use.



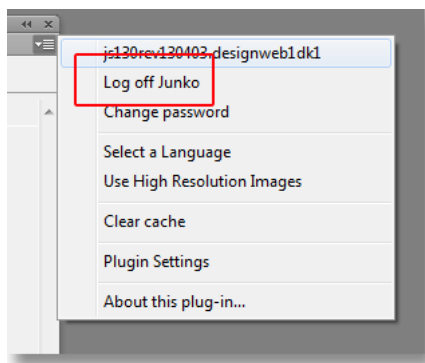
When you are logged in, the panel menu looks like this:



First on the panel menu, is the web server you are connected to.

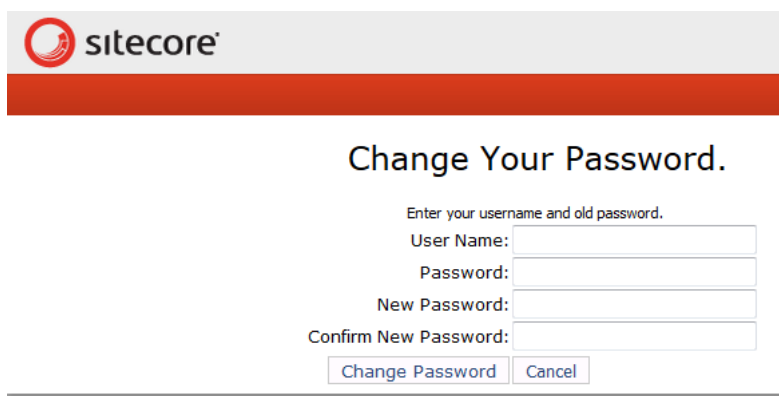
2.2.2 Logging off

The Log off command shows you the username you logged in with. To log off from Sitecore, click **Log off** and then click **Yes** to confirm.



2.2.3 Changing your password

If you want to change your password, in the Panel menu, click **Change Password** from the panel menu to change your password with a new one.

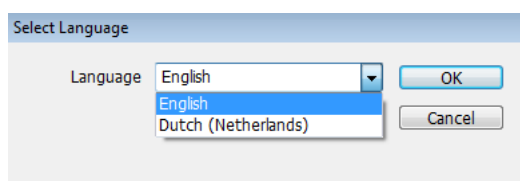
A screenshot of the 'Change Your Password' dialog box. The dialog has a white background with a red header bar containing the Sitecore logo and the text 'sitecore®'. Below the header, the title 'Change Your Password.' is centered. Underneath, there is a prompt 'Enter your username and old password.' followed by four input fields: 'User Name:', 'Password:', 'New Password:', and 'Confirm New Password:'. At the bottom of the dialog, there are two buttons: 'Change Password' and 'Cancel'.

2.2.4 Selecting a Language

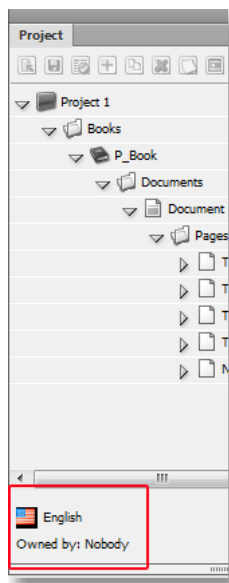
In the InDesign Connector, the current language is indicated by the flag in the **Project** panel. To see a list of all the available languages, go to the panel menu and click **Select a Language**. The available languages correspond with the content languages available in Sitecore CMS.

To choose the language:

1. Open the panel menu and click **Select a Language**.
2. In the **Select Language** dialog box, choose from a list of available Sitecore language versions and click **OK**.



You can see your selected language in the **Project** panel.



2.2.5 Using High or Low Resolution Images

If you work online, you can only use low resolution images that are extracted from the Sitecore media library. However, if you work 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.

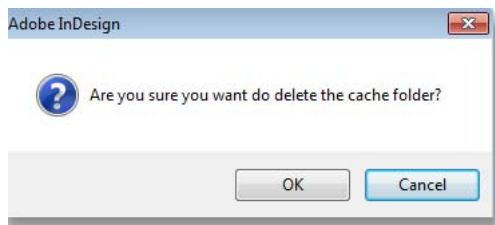
To switch to high resolution images on desktop, on the panel menu, click **Use High Resolution Images**. To switch back to low resolution images, select **Use Low Resolution Images**.

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.

2.2.6 Clearing the Cache

To speed up the process of downloading information from the Sitecore server to the InDesign desktop client, Sitecore is set up to automatically cache data. That is similar to caching with your web browser. To clear the cache, on the panel menu, click **Clear cache** and then click **OK**.

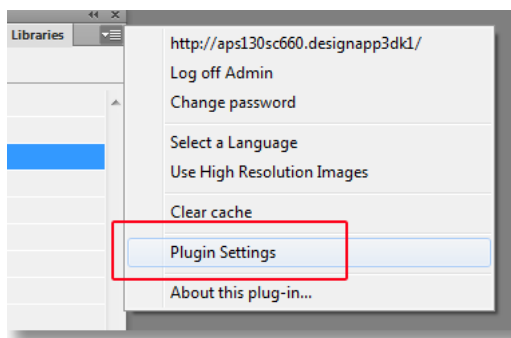


2.2.7 Changing the Cache Location

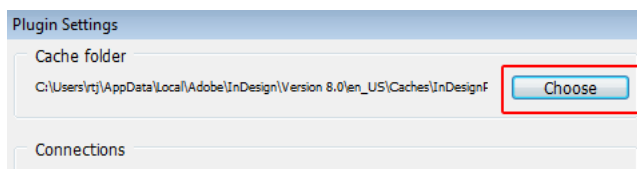
You are able to move the cache to a specific location.

To change the location of the cache folder:

1. On the panel menu, click **Plugin Settings**.

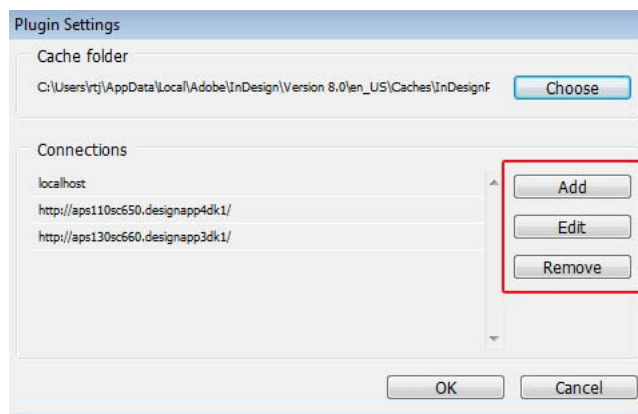


2. In the **Plugin Settings** dialog box, click **Choose**.



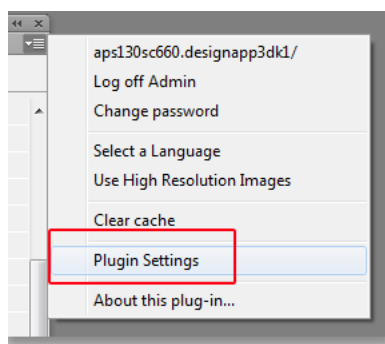
2.2.8 Adding, Editing, and Removing Web servers

You can save and control your plugin presets by clicking **Plugin Settings** from the panel menu. You can add, edit, and remove your web server presets here. The dialog box also allows you to set the cache folder.

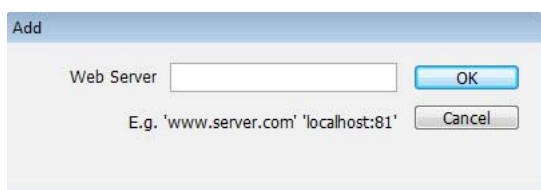


To add a new web server:

1. On the panel menu, click **Plugin Settings**.



2. Click **Add**.
3. Enter the URL and click **OK**.



Tip

If you are not able to save new URLs, this might be because you have insufficient access rights to that specific folder. In that case consult your administrator.

2.2.9 Checking the Version Number






















Sometimes you need to know the version number of the InDesign Connector plugin.

To check the version number of the plugin:

1. On the panel menu, click **About this Plugin**.

2.3 Buttons in the Sitecore Panels

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

Button	Description	Panels					
		Project	Content	Libraries	Media	Workbox	Extensions
	Publish the current item	X					X
	Save	X		X			X
	Save the current item	X					
	Add an item to the current item	X		X			X
	Add a folder			X			X
	Duplicate	X					
	Delete the current item	X		X			X
	Cut item			X			X
	Copy item			X			X
	Paste item			X			X
	Add note	X					
	Find the assigned item	X					
	Insert field as variable		X				X
	Refresh	X	X	X	X	X	X
	Select the corresponding tree item	X					
	Move selected item to first position	X		X			X
	Move selected item one position up	X		X			X
	Move selected item one position down	X		X			X
	Move selected item to last position	X		X			X
	Find image				X		
	Open item					X	
	Accept item					X	

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, and Snapshots.

This chapter contains the following sections:

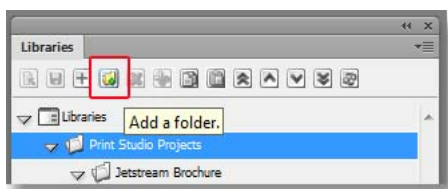
- Adding Folders
- Creating New Projects
- Creating New Master Documents
- Modifying Master Documents
- Creating Snapshots

3.1 Adding Folders

The Libraries panel shows all available libraries that you can use to create an InDesign project. You can add new projects directly to the Print Studio Projects folder or you can create a new folder to contain your new project.

To add a folder:

1. In the **Libraries** panel, click the folder you want to add your new folder to.
2. Click **Add a folder**.



3. Name the folder and click **OK**.
4. Click **Refresh** to see the new folder.

Note

You can right-click the item in the tree to rename both the item name and the display name.

Sitecore distinguishes between **item names** and **display names**. Display names provide an alternate descriptive name for content items. If provided, the display name overrides the default display of the item's name.

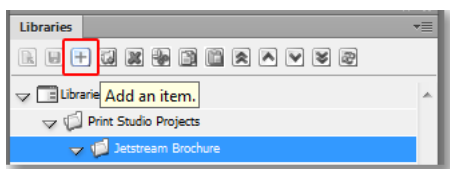
Display names are useful if you work with different languages. The display name allows you to work with language-specific display names.

Special characters such as ; | * are not supported.

3.2 Creating New Projects

To create a new project:

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



In the **Add new project** dialog box, enter the name of the new project. In the **Branch** field, select one of the available project branches from the drop-down list.

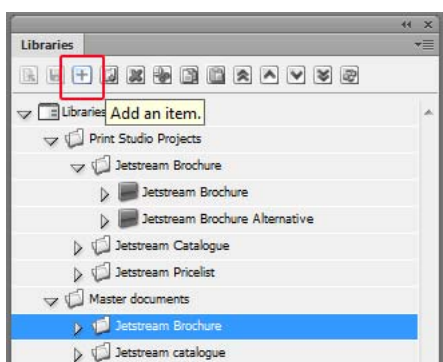
3. The project branches are stored and created in the Sitecore CMS. You can change or create additional branches if you have administrator or sufficient user access rights.
4. Click **OK** to create a new project with a structure based on the selected branch.
5. To open this project, drag it to the **Project** panel (see *Opening Projects*).

3.3 Creating New Master Documents

The master document contains all style settings like paragraph styles, character styles, page sizes, color definitions, margins, and so on. Every document item in your project needs to have a master document assigned. By default, a default master document is assigned to every new document.

To create a new master document in InDesign:

1. In the **Libraries** panel, in the *Master documents* section, click the folder in which you want to create the new master document.
2. Create a new InDesign document or open an existing document.
3. Click **Add an item**.



4. In the new master dialog box, enter the name of the new master and click **OK**.
5. The InDesign document is now uploaded to the server and stored as a new master document in the libraries. Click **Refresh** to refresh the tree.

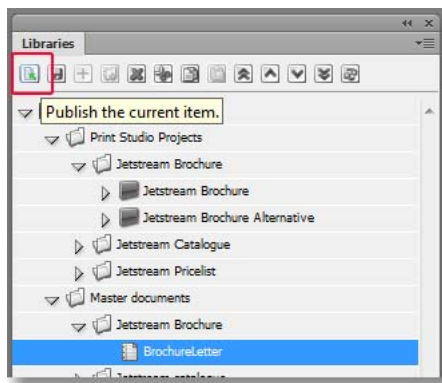
Warning

Avoid working with different InDesign versions. For example, once you save a master in CS6, you cannot open it in CS5.5.

3.4 Modifying Master Documents

To modify a master document:

1. In the **Libraries** panel, click the Master document that you want to modify.
2. Click **Publish the current item**.

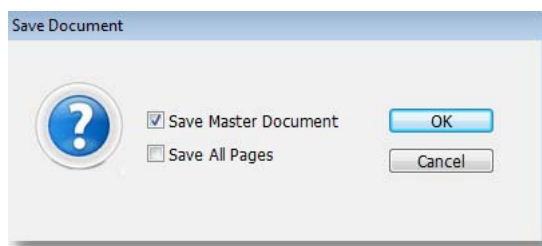


3. Make the changes to the document (for example, change paragraph style settings).
4. With the **Master document** item selected in the tree *and* the document open in InDesign, click **Save**.

You can also change a master document in the **Project** panel.

To modify a master document from the **Project** panel:

1. In the **Project** panel, publish the document.
2. Make the changes to the master document (for example, change paragraph style settings)
3. With the document selected in the project panel, click **Save**.
4. In the **Save Document** dialog box, select **Save Master Document** and click **OK**.

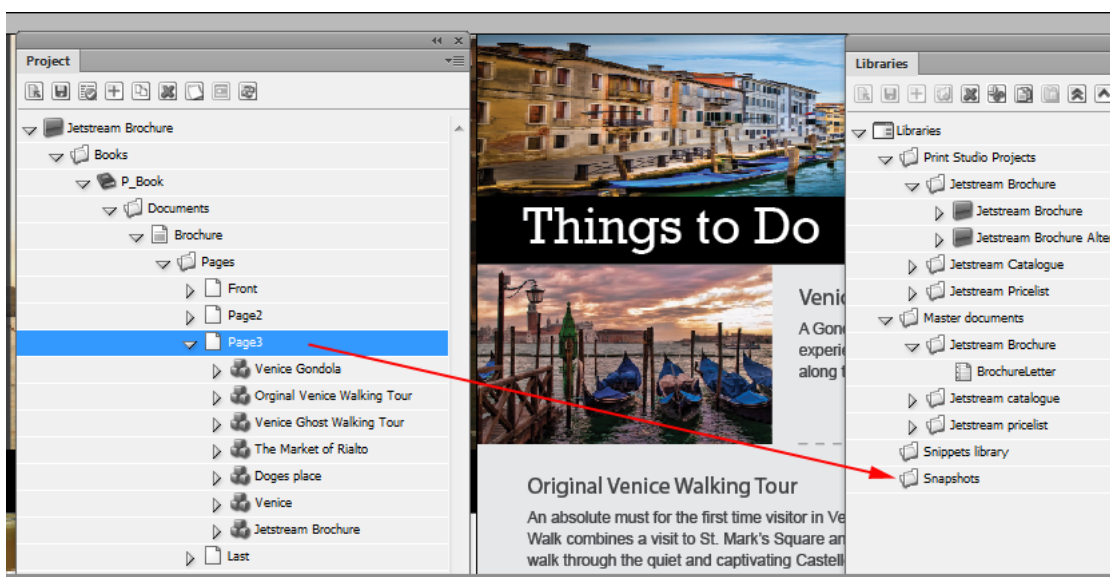


3.5 Creating Snapshots

You can create a snapshot to show a thumbnail image of a snippet. You can create snapshots of documents, pages, and snippets. The snapshots are stored as JPEG images in the Sitecore media library.

To create a snapshot:

1. In the **Project** panel, select the item you want to create the snapshot for.
2. **Publish** the page.
3. Click the item in the **Project** panel, and drag it 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.

Chapter 4

The Project Panel

This chapter describes how to work with the Print Studio projects. This chapter contains the following sections:

- Project Structure
- Opening Projects
- Adding Documents
- Adding Pages
- Renumbering Pages in Documents
- Using Items from Existing Projects
- Working with Master Documents
- Publishing Documents and Pages
- Saving Documents and Pages
- Finding and Selecting Items
- Renaming and Scaling Items
- Duplicating Items
- Deleting Items
- Adding Notes
- Threading Text Frames
- Locating Assigned Items

4.1 Project Structure

A project consists of a number of elements with a structure that corresponds to the InDesign model of a document. The project structure of each InDesign project contains several elements and folders.

It is important to remember that:

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

To open the **Project** panel, click **Window, Sitecore, Project**.

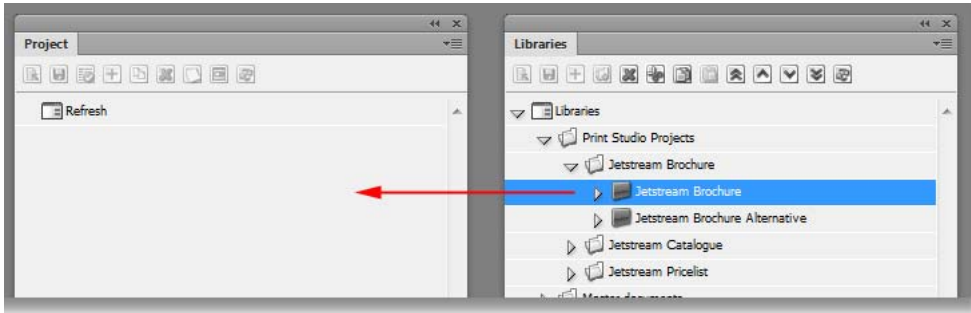
Tip

Your settings 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.

4.2 Opening Projects

To open a project:

1. Open both the **Libraries** and the **Project** panel.
2. In the **Libraries** panel, open the *Print Studio Projects* folder.
3. Click the project you need and drag and drop it to the **Project** panel.



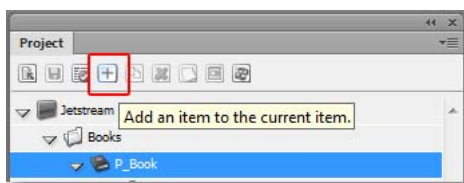
For information on creating new projects, see the section *Creating New Projects*.

4.3 Adding Documents

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

To add a **Document** folder to the **Book** item:

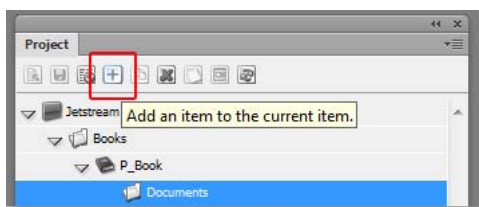
1. In the **Project** panel, click the **Book** item, and click **Add**.



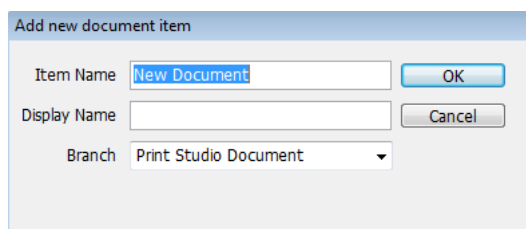
2. Click **Refresh** to refresh the tree structure and display the new documents folder in the book item.

To add a document:

1. In the **Project** panel, click the **Documents** folder, and click **Add**.



2. In the **Add new document item** dialog box, enter the name of the new document item and select a branch.
3. The document branches are stored and created in Sitecore. If you have sufficient access rights, you can change the branches or create additional branches. Ask your administrator for more information.



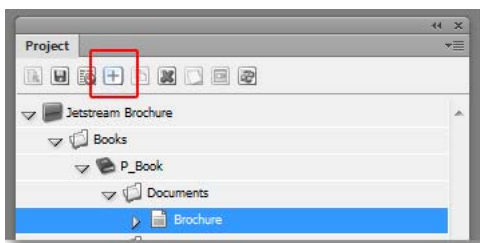
4. Click **OK**.
5. Click **Refresh** to refresh the tree structure.

4.4 Adding Pages

You can add pages and pages folders to documents.

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

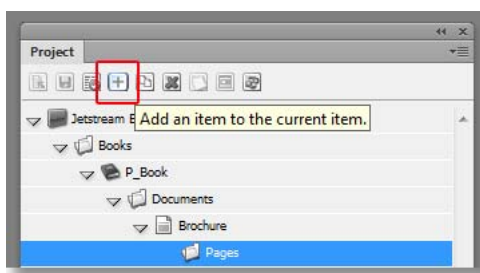
1. In the **Project** panel, select the document item you want to add the folder to.
2. Click **Add**.



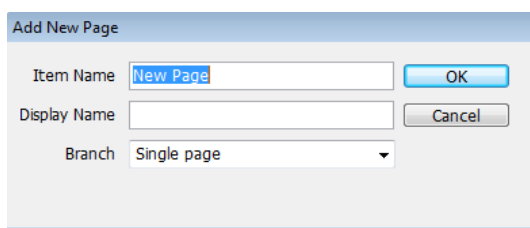
3. Click **Yes**. A new *Pages* folder is added to the selected document.
4. Click **Refresh** to refresh the tree structure.

To add a page:

1. Select the *Pages* folder you want to add a page to and click **Add**.



2. In the **Add New Page** dialog box, 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 only change the page branches or create additional page branches if you have sufficient rights. Ask your administrator for more information.



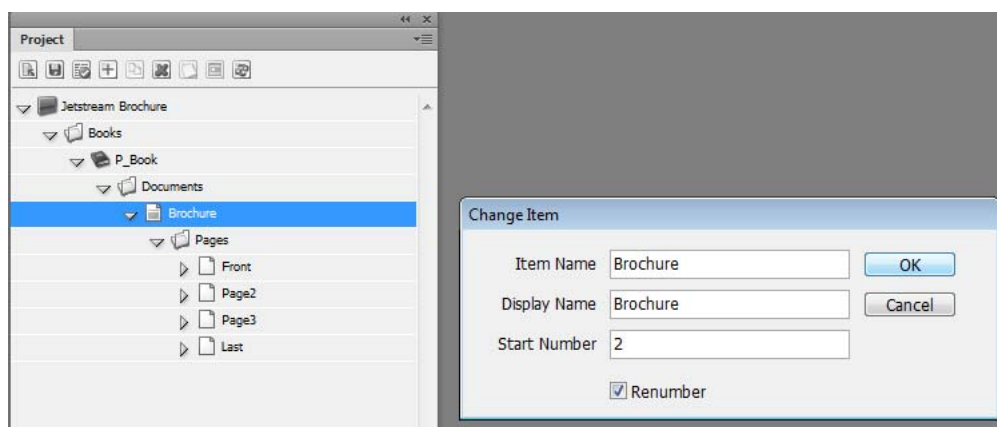
3. Click **OK** to add one or more new pages (depending on the branch you select).
4. Click **Refresh** to refresh the tree structure.

4.5 Renumbering Pages in Documents

You could need to renumber your pages. For example, because you initially numbered the document as page 1 but want to renumber page 2 and have the rest of the pages sequentially renumbered to the end. In the **Project** panel, you can renumber a set of pages for folders or for an entire document.

To renumber a set of pages for an entire document:

1. In the **Project** panel, right-click the document or page item.
2. In the **Change Item** dialog box, enter the new start number.



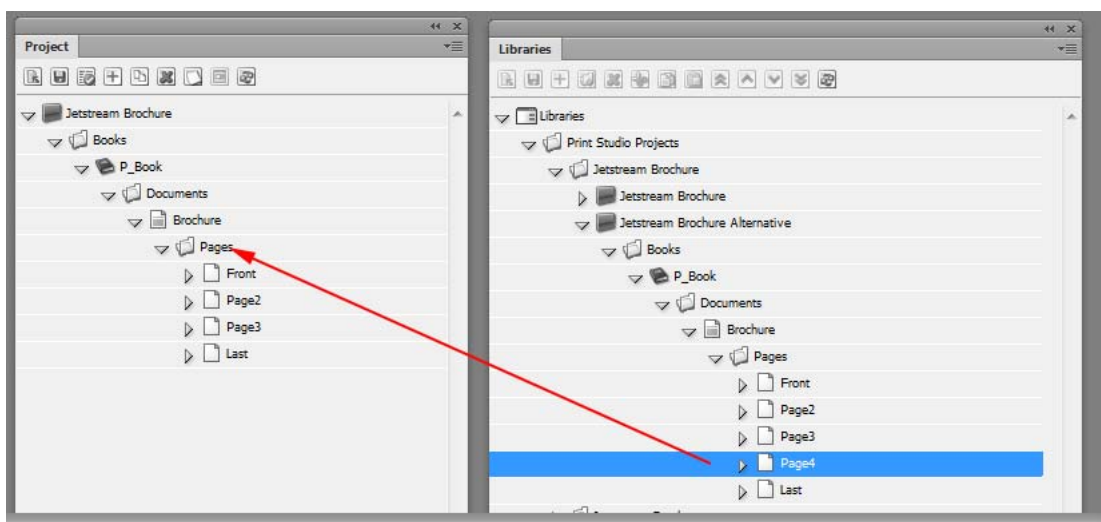
3. Select the **Renumber** check box and click **OK**.
4. All pages in the document are renumbered starting with the number provided in the **Start Number** field.

4.6 Using Items from Existing Projects

To reuse items (for example, a document, page folder, page, snippet) from an existing project in a new project, drag the item that you want to use from the project in the **Libraries** panel and drop them on the opened project in the **Project** panel.

To drag and drop items on a page item:

1. In the **Libraries** panel, select the page item that you want to reuse.
2. Drag and drop this item to the *Pages* item in your new project in the **Project** panel:



The selected page and all items on that page are added to the *Pages* folder.

4.7 Working with Master Documents

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

By default, the default master document is assigned to new document. You can change the master document by assigning a new master from the **Libraries** panel. If the master document that you need is not available in the **Libraries** panel, you can add a new master document. For more information about adding master documents, see the section *Creating New Master Documents*.

Note

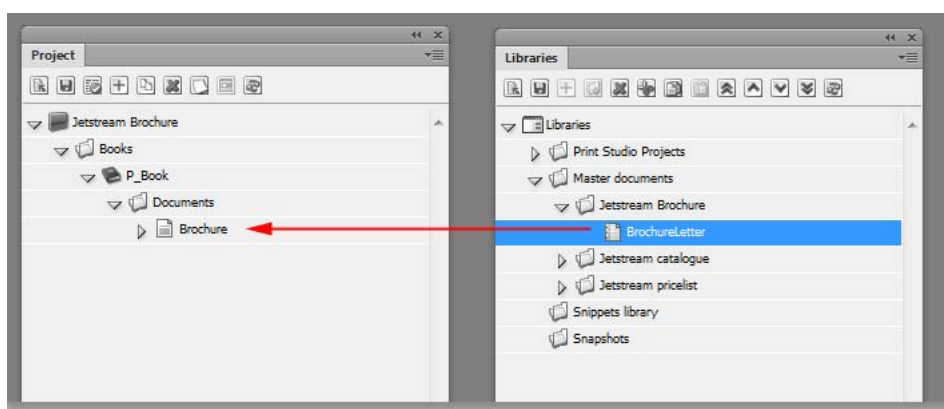
New documents are assigned the default master document. You can change the master document by assigning a new master from the **Libraries** panel.

Ask your administrator to change the master document that is assigned by default.

4.7.1 Assigning a Master Document to a Document Item

To assign a master document to a document item:

1. In the **Libraries** panel, in the *Master documents* section, select the master document.
2. Drag the master document to the **Project** panel and drop it on the document item that you want to assign it to.



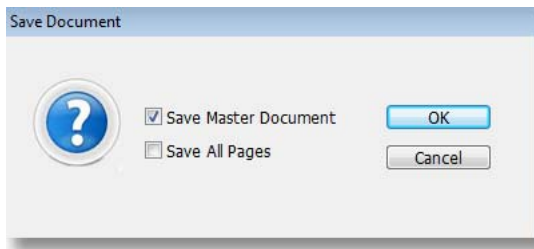
The master document is assigned to the document.

4.7.2 Saving Master Document Changes

If you have changed the style settings, you need to save the master document. You can just publish your document, make the changes and then save the document.

To save a document:

1. In the **Project** panel, select the **Document** item and click **Save**.
2. In the **Save Document** dialog box, select the **Save Master Document** check box and click **OK**.



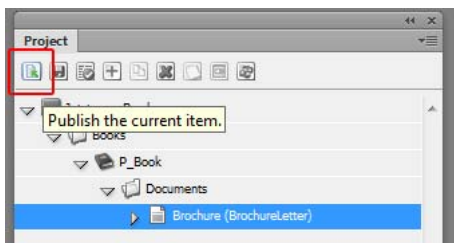
For more information about changing master documents, see the section *Modifying Master Documents*.

4.8 Publishing Documents and Pages

To start working on the design of the project that you are working on in the **Project** panel, you need to publish it first.

To publish a document item:

1. In the **Project** panel, select the document or page item you want to publish.
2. Click **Publish the current item**.



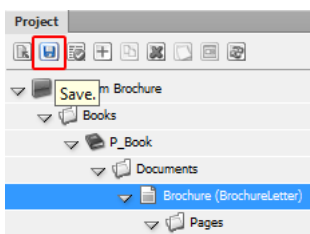
Note

If you publish documents or pages folders, they will appear in the project order. However, if you decide to publish pages separately (for example when you work with large documents), the order could no longer be chronological. For example, if you first publish page 2 and then publish page 1; page 1 will be positioned after page 2. This has no influence on the end result.

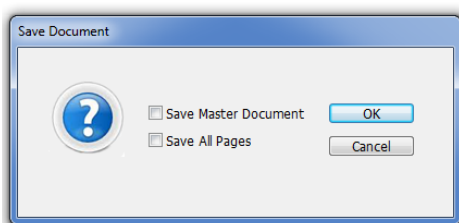
4.9 Saving Documents and Pages

To save your document:

1. Publish the document and make the adjustments.
2. In the **Project** panel, select the **Document** item, and click **Save**.



3. In the **Save Document** dialog box, select the **Save All Pages** check box if you want to save the layout of all pages. Select the **Save Master Document** check box if you also want to save the changes made to the master document.



Note

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

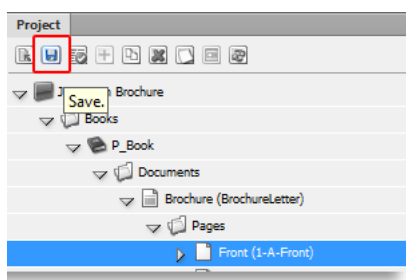
4. Click **OK** to save.

Tip

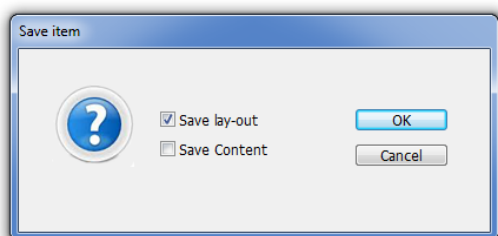
If you save a large number of pages, it might take some time to process. To avoid this, you can use the **Save Page** method instead.

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

1. In the **Project** panel, select the *Page* item you want to save and click **Save**.



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



Note

If you want to use images on a master document, you must add them as embedded images or make sure the used images can be accessed by other users when the document is loaded.

4.9.1 Saving Static Page Items

If you want to add 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. You can also add static text (*soft texts*) to a snippet. For more information, about adding static text, see section *Adding Static Content*.

Note

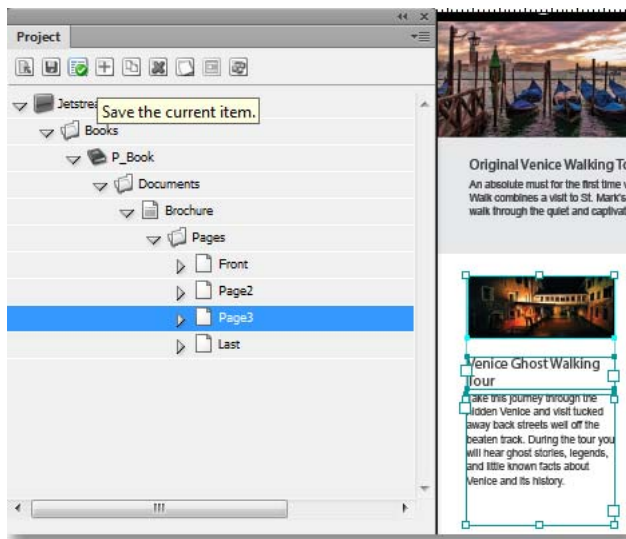
If you add images as static items to a page, make sure the images are accessible for other users as well.

In order to add page-specific items (for example rectangles, text frames (with content), image frames), simply add the 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.

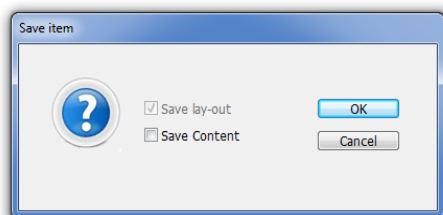
4.9.2 Saving Selected Page Items

To save one or more selected page items.

1. On the page layout, select the page item(s), and click **Save the current item**.



2. In the **Save Item** dialog box, select the **Save Content** check box to save the content of any selected text frame to the assigned content item.



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 content 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.

Important

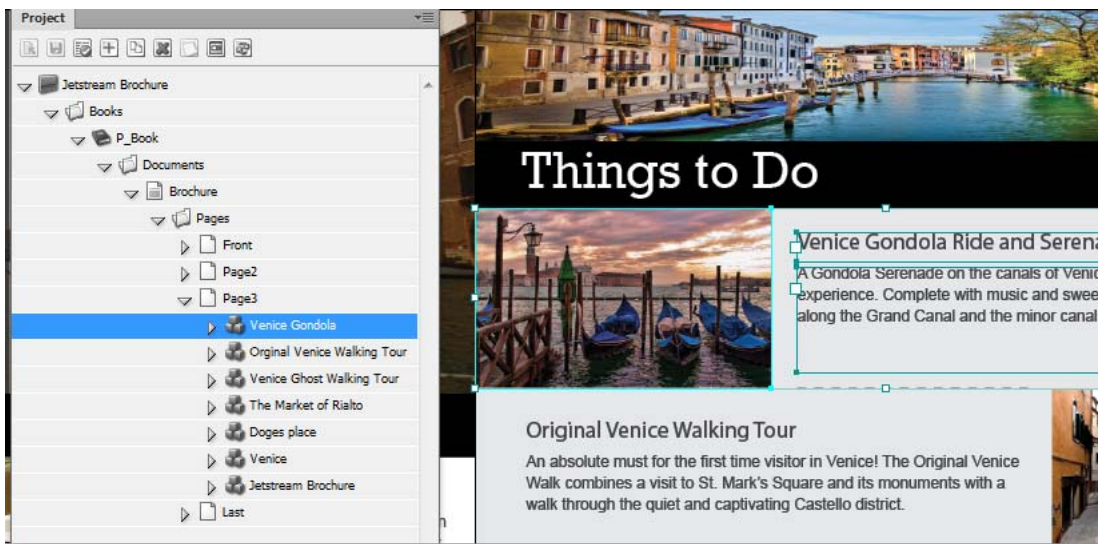
Be aware that when you save the content, you are saving in the selected language. The language is indicated by the flag and language name in the **Project** panel.



4.10 Finding and Selecting Items

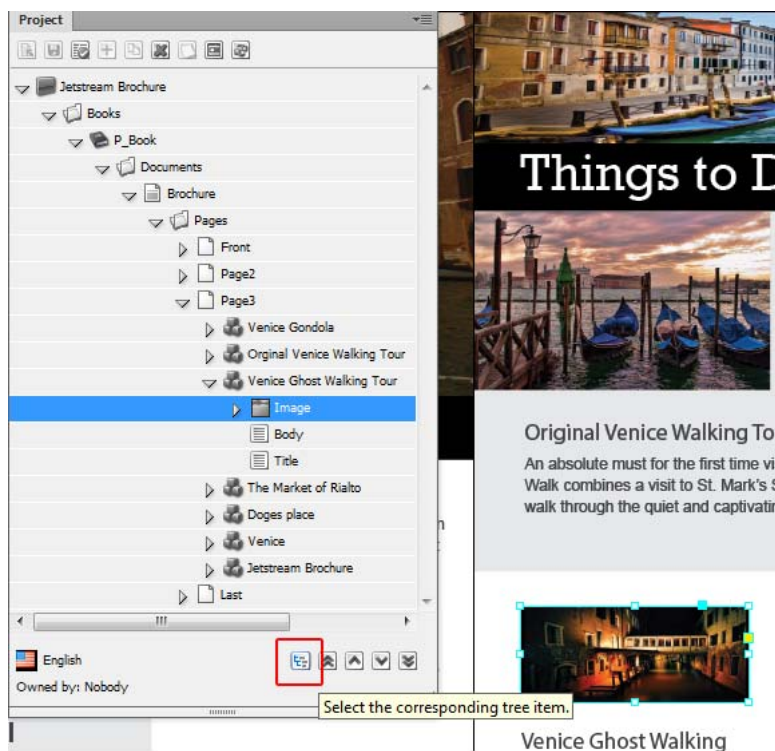
To select a specific snippet or a child item of a snippet from the tree on the page:

- In the **Project** panel, double-click the item in the tree. In the following example the related InDesign objects of the *Venice Gondola* snippet are selected on the page.



To find an InDesign object in the project tree:

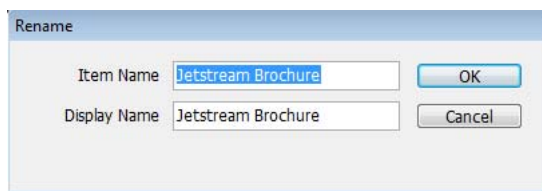
- Select the InDesign object you want to find and click **Select the corresponding tree item**. In the following example the image belonging to the *Venice Ghost Walking Tour* is located in the tree.



4.11 Renaming and Scaling Items

To rename an item in the tree:

1. In the **Project** panel, select the item in the tree, and right-click.
2. In the **Rename** dialog box, enter the new item name and/or display name and click **OK**.



3. Click **Refresh** to refresh the tree.

Note

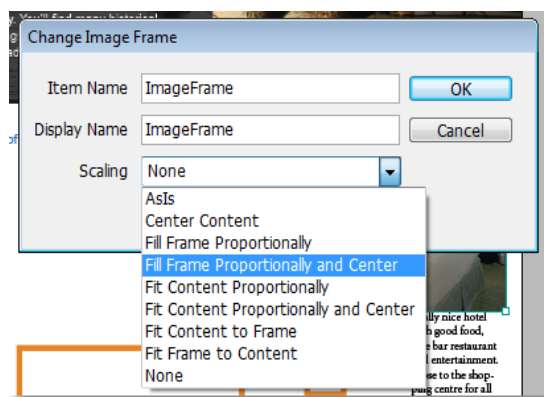
You can right-click the item in the tree to rename both the item name and the display name.

Sitecore distinguishes between **item names** and **display names**. Display names provide an alternate descriptive name for content items. If provided, the display name overrides the default display of the item's name.

Display names are useful when working with different languages the display name allows you to work with language specific display names.

Special characters such as ; | * are not supported.

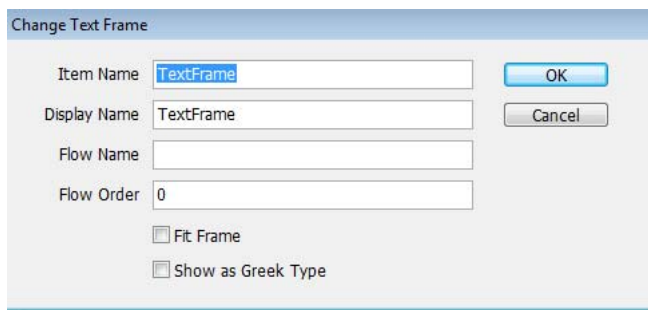
If you rename an **Image** frame item, you can also select how you want the image to be automatically scaled.



The scaling methods correspond to the scaling (or fitting) options available in InDesign. Scaling options are only visible when (re)publishing the corresponding item. Please note that **Fit Content Proportionally and Center** is a combination of **Fit Content Proportionally** and **Center Content**. This combination is not a standard option in InDesign.

To rename a text frame item:

1. In the **Change Textframe** dialog box, you can set the **Item Name**, **Display Name**, **Flow Name**, and **Flow Order**. Set the **Flow Name** and **Flow Order** to create a set of connected text frames. For more information about connecting text frames, see *Threading Text Frames*.



2. Select **Fit Frame** if you want the text frame to automatically fit to the frame content when it is published.
3. Select **Shows as Greek Type** if the frame needs to be displayed as *Greek* type in the Print Studio Editor. This is necessary when you publish 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.

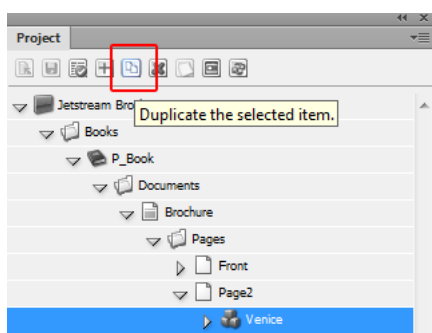
4.12 Duplicating Items

If you want to reuse a selection of items, you can copy and paste the selection on the page and save it to a page or snippet by dragging it to the **Project** panel (see section *Adding Dynamic Content*).

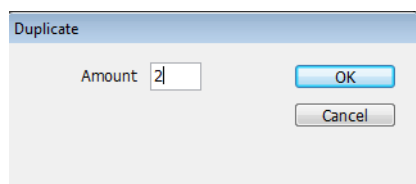
If you have several items you want to duplicate, you can save time by using the duplicate functionality in the **Project** panel or to create a master snippet (for more information about master snippets, see section *Creating Snapshots*). The following section describes the procedure of duplicating from the **Project** panel.

To duplicate an item:

1. In the **Project** panel, navigate to the page or snippet that you want to duplicate.
2. Click **Duplicate the selected item**.



3. In the dialog box that appears, choose whether you want to include child items or not. Click **Yes** to include the child items. Click **No** to just duplicate the selected item without its child items.
4. In the **Duplicate** dialog box, enter the number of duplications that you need.

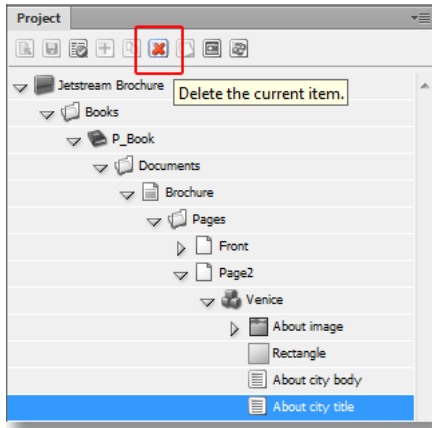


5. Click **OK** to duplicate the item. In this example, the snippet is duplicated twice in the tree. Now you can rename the snippets and assign a different content item.
6. Publish the page or document to rearrange the duplicated snippets.

4.13 Deleting Items

To delete an item:

1. In the **Project** panel, select the item in the tree structure.
2. Click **Delete the current item**.

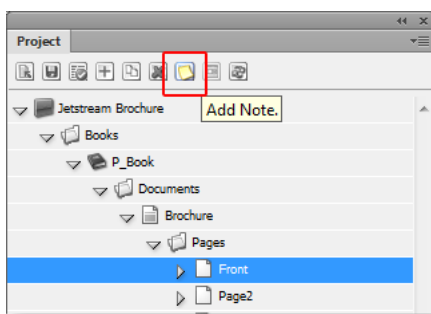


4.14 Adding Notes

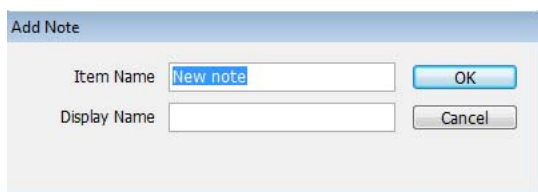
A note is basically a text frame with default settings. If a new note is created, it uses the background color Yellow, and the object style Note. These settings are controlled in the Sitecore item template that defines the note item. The text is formatted with the default paragraph style Text and Sticky for the note text. You can change the settings of styles in the InDesign master document.

To add a note to a page:

1. In the **Project** panel, select the page item where you want to add the note, and publish the page.
2. Click **Add Note**.

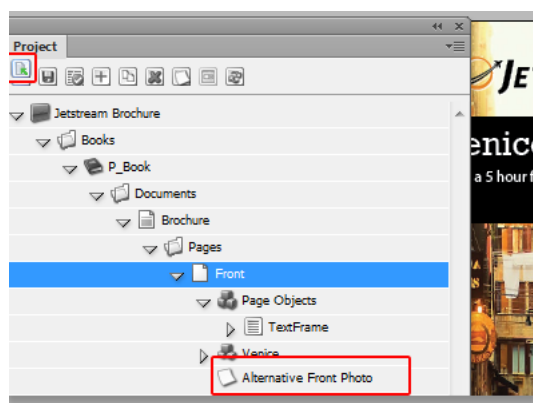


3. In the **Add Note** dialog box, enter a name, and click **OK**.

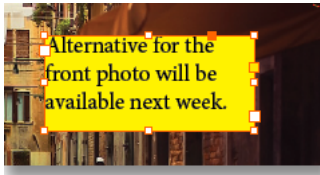


A note item is created.

4. Click **Publish the selected item** to re-publish the page.



5. The new note is published on the page. Now you can move and resize the note frame and change its content.



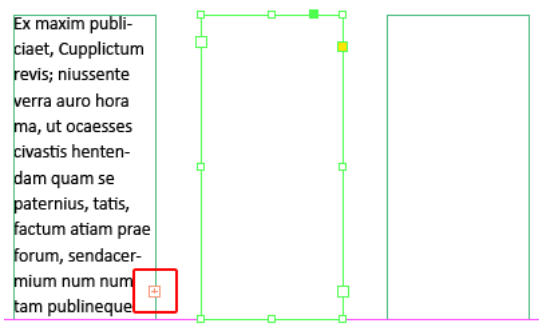
6. Save the page.

4.15 Threading Text Frames

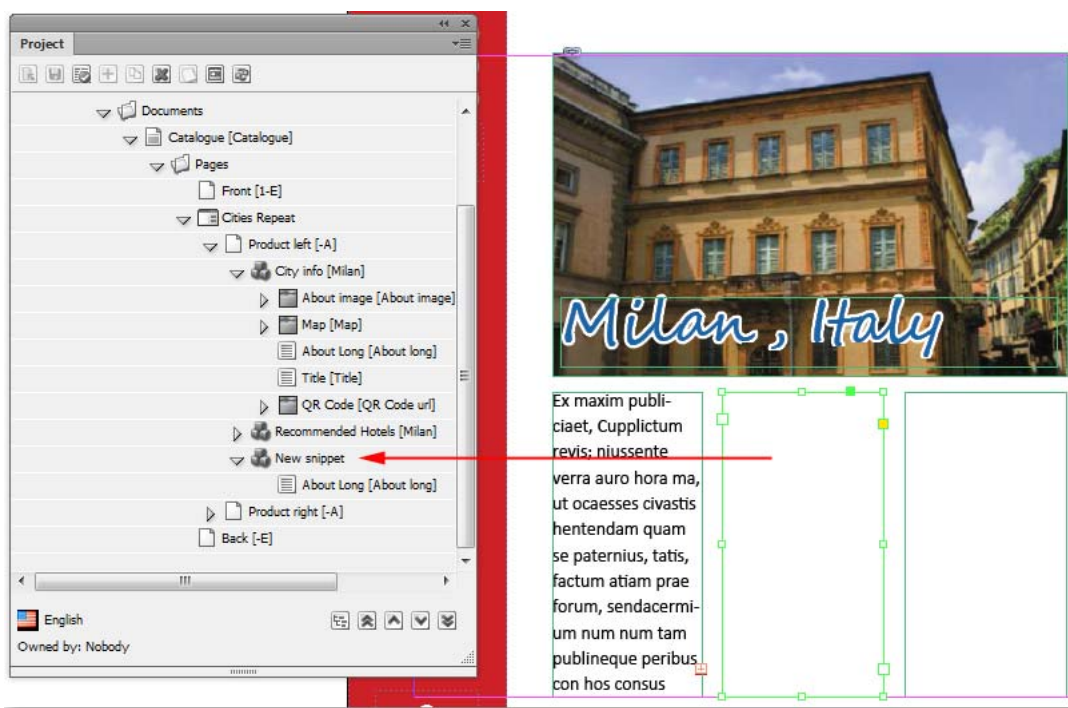
To allow text to flow between connected frames, you must first link (or *thread*) the frames.

To create a set of linked frames:

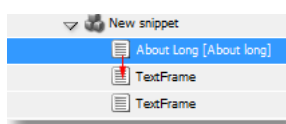
1. If you have a text frame with more text than can fit in the frame, a red overflow symbol appears. To flow text between connected frames, first create additional text frames on the page.



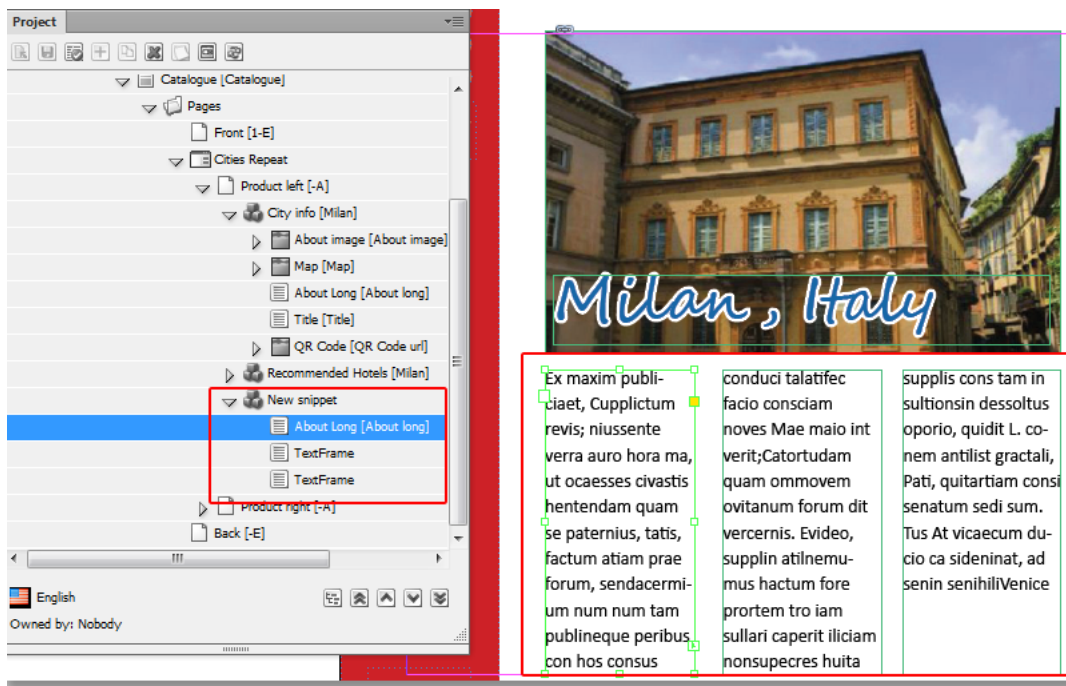
2. Drag the text frames to a snippet in the project tree.



3. You added new text frames to the snippet. Navigate to the text frame item that you want to link to your new text frame. Click and hold to drag the item to the new text frame items.



The frames are now linked.



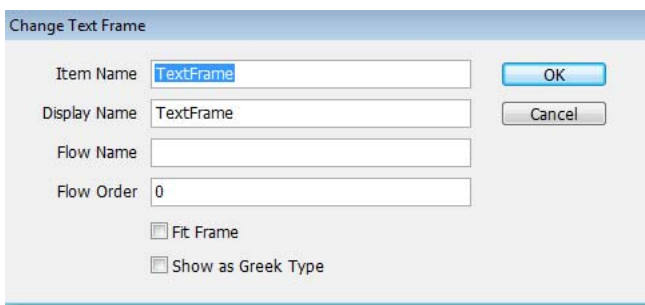
Note

You can only link to an empty text frame.

The text flow (how the frames are connected and in which order) is controlled by the values of the **Flow Name** and **Flow Order**.

To access the values of the **Flow Order** and **Flow Name**:

1. Select the text frame item in the tree structure and right-click.
2. In the **Change Text Frame** dialog box you can see the Flow Name and Flow Order of the text frame.

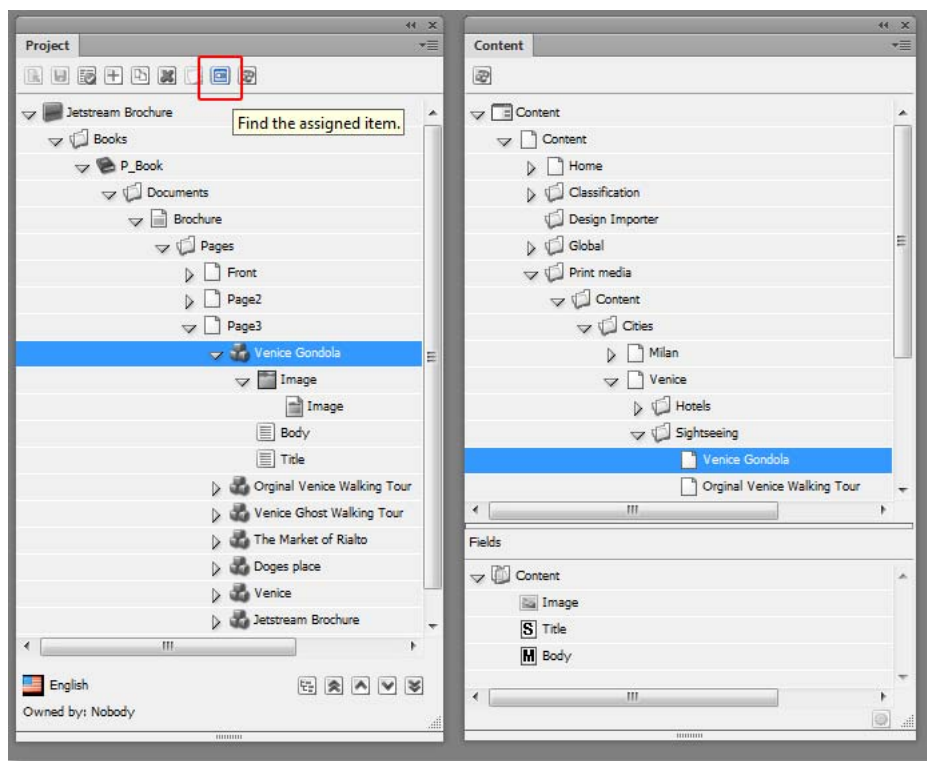


The value of the **Flow Name** field defines which frames will be connected when publishing. All frames with identical flow name value will be connected. The **Flow Order** value defines the order of those text frames. When you use the drag and drop method as described earlier, a unique ID is used to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

4.16 Locating Assigned Items

To locate the content item assigned to a snippet:

1. In the **Project** panel, select the snippet item.
2. Click **Find the assigned item**. If the item is available and accessible, the item is located and selected in the **Content** panel.



Chapter 5

Creating Snippets

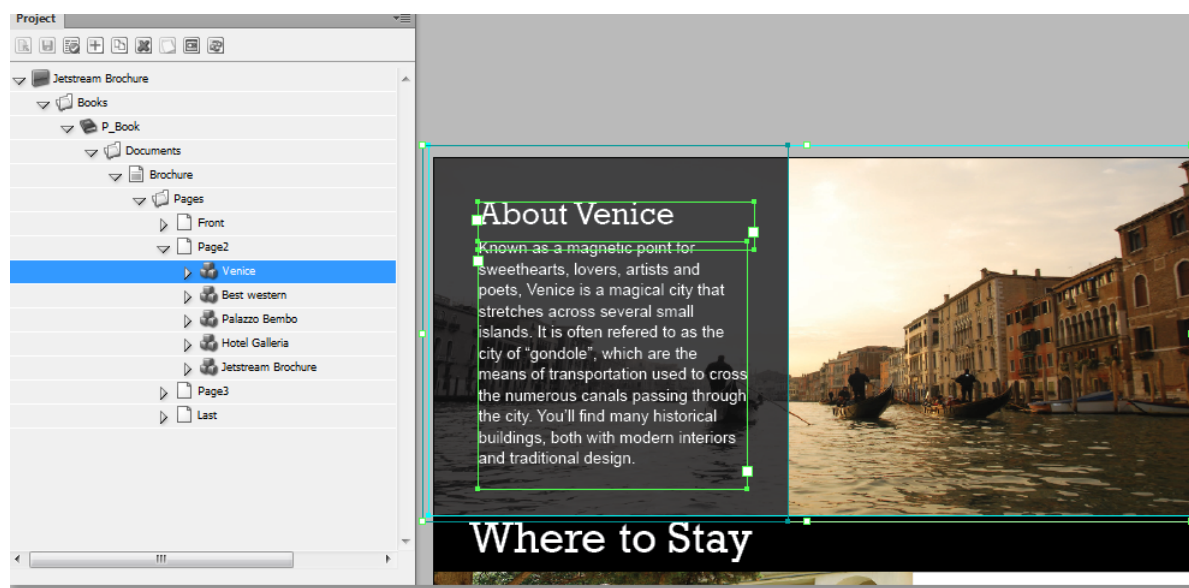
A snippet is a collection of page items (text frames, images, and so on) that you can use again and again. This chapter explains the concept of snippets and describes how to create snippets.

This chapter contains the following sections:

- Creating Snippets
- Adding Dynamic Content
- Adding Static Content
- Adding a QR Code Image
- Finding Assigned Items
- Saving Snippets as Master Snippets
- Using Master Snippets to Create Page Snippets

5.1 Creating Snippets

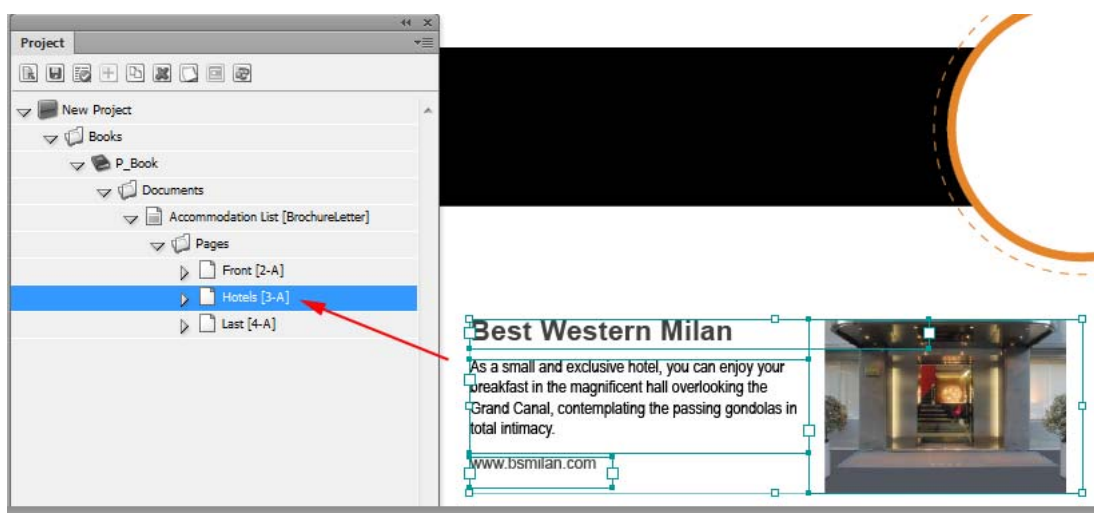
In the following example, we have used a snippet with some text frames and image frames to present the Venice product. The content for these frames is fetched from the CMS.



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 faster.

A snippet is a collection of page items (text frames, images, and so on) that you can use again and again. You can add snippets to your page structure by simply dragging items from your InDesign page to the **Project** panel. This can be static or dynamic data:

- Dynamic - add a dynamic item (text frame or image) based on a content field from the Content panel. See *Adding Dynamic Content*.
- Static - add a static item in InDesign and add it to the snippet. See *Adding Static Content*.

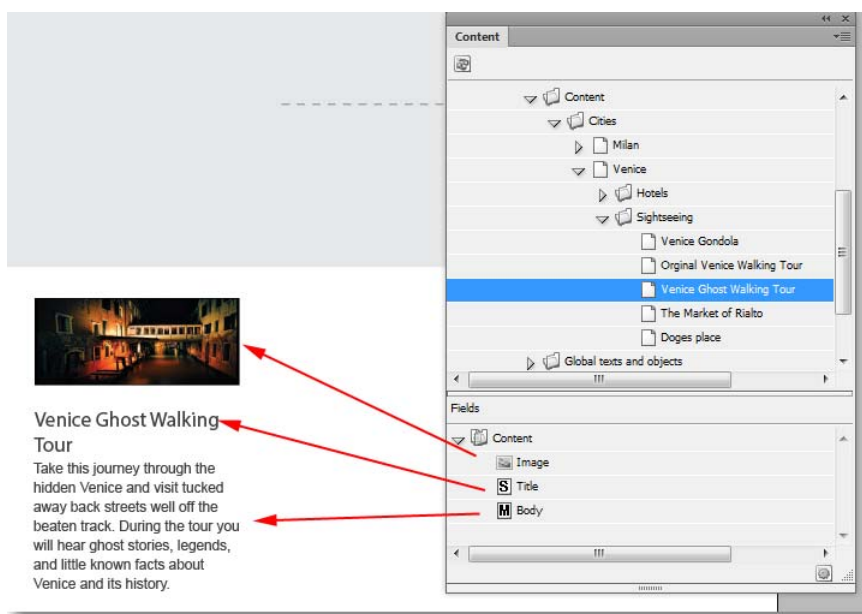


5.2 Adding Dynamic Content

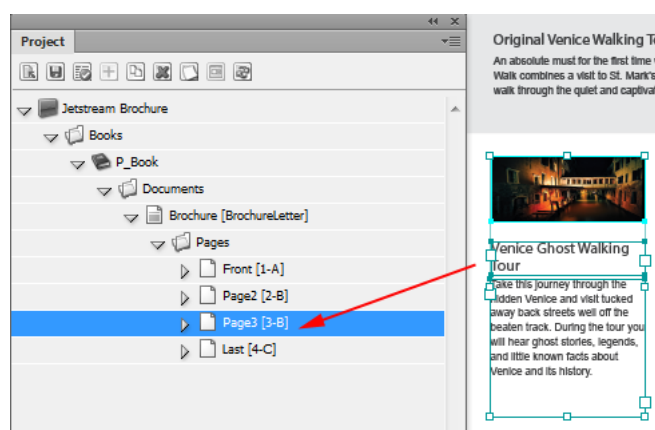
To use product imagery or product details stored within Sitecore, you can add dynamic items to your InDesign project. These dynamic items are based on a content field from the **Content** panel. The **Content** panel shows the content structure and items as they are available in Sitecore CMS.

To add dynamic content:

1. From the **Content** panel, select the content item.
2. Drag the fields you need to your InDesign page and make the design.



3. Select the items on the page and drag them to the page in the **Project** panel.



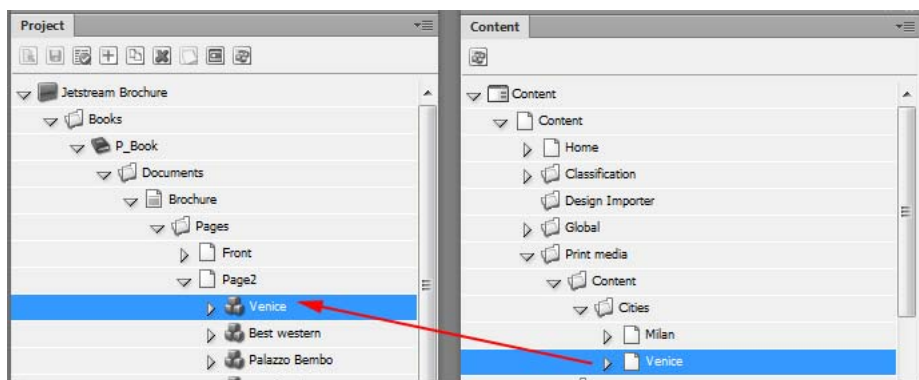
Important

To create a snippet from grouped frames, you must first ungroup the frames.

4. Find the snippet in the project tree. Right-click the snippet to rename it. Click **OK**. A dialog box is displayed to confirm the creation of the new snippet.
5. Click **Refresh** to refresh the tree structure.
6. Assign a content item.

To assign a content item to the snippet:

1. In the **Content** panel, select the content item.
2. Drag and drop the content item to the snippet item in the **Project** panel.



The content item is assigned to the snippet item.

3. Publish the page to see the assigned content loaded on the page.
4. Save the page or document.

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.

5.3 Adding Static Content

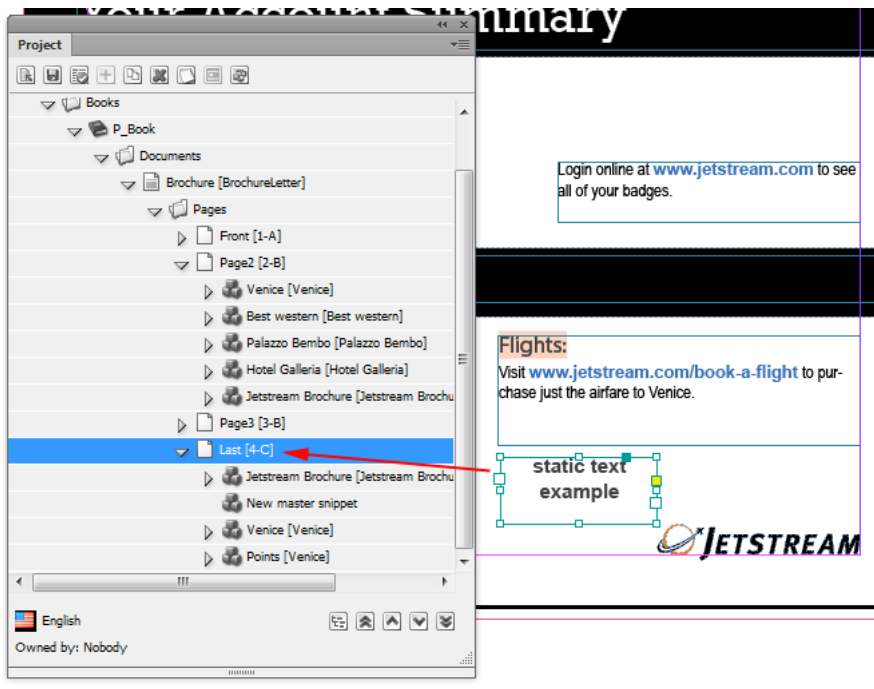
If you want to save content that is not available in the CMS, you can add static data to your project.

To add a static text frame:

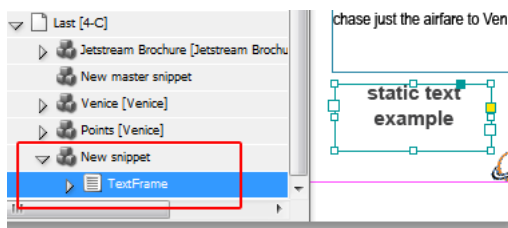
1. On the InDesign page, create the item you want to add.



2. Select the new item on your InDesign page and drag it to the page in the **Project** panel.



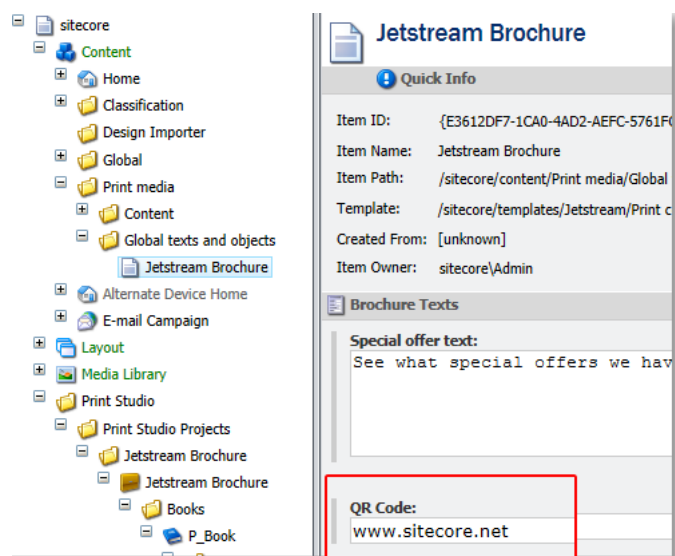
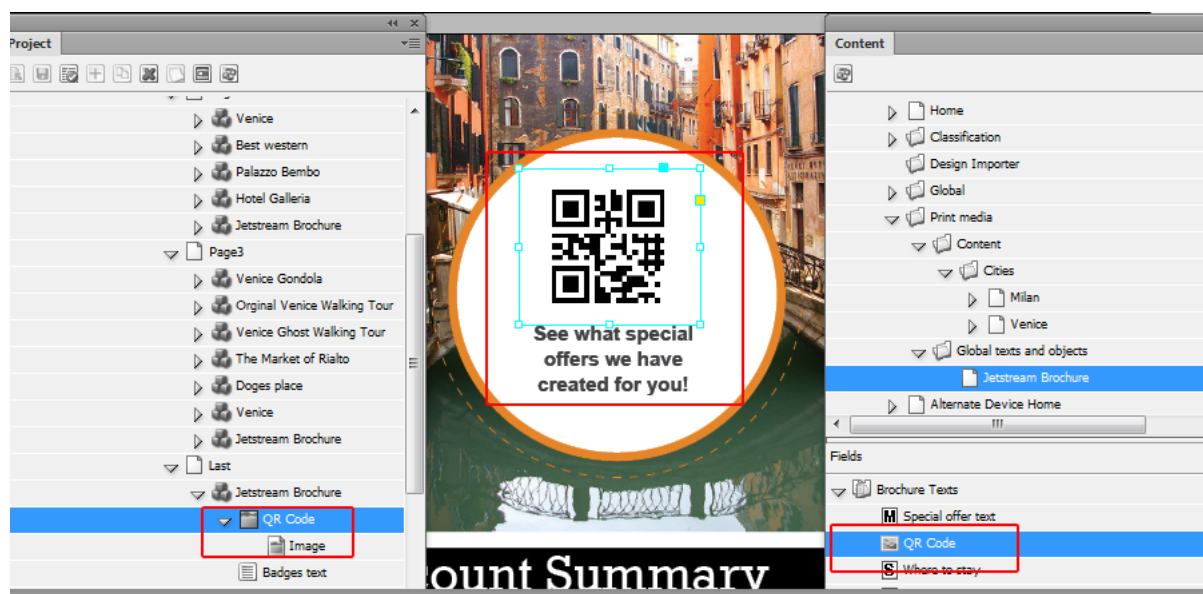
3. If you drop the new item on page level, it will be placed in a new snippet (see the following screenshot). You can also drop the new item on an existing snippet.



4. Click **Save**.

5.4 Adding 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. Ask your administrator for additional information. In the following example, the QR code image is rendered based on the value `http://www.sitecore.net`. If the QR code is scanned, the URL `http://www.sitecore.net` is loaded.



To add a QR code image:

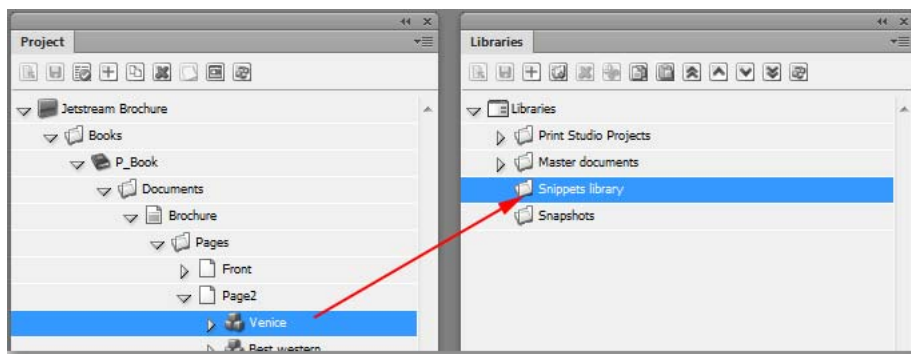
1. In the **Content** panel, select the QR field you want to use.
2. Drag and drop the field to the page.
3. Make the design and drag the item to the snippet in the **Project** panel. The field is added to the snippet.
4. Save the page.

5.5 Saving Snippets as Master Snippets

If you want to reuse a specific snippet or page, it can be convenient to make it a master snippet. Master snippets act as templates for the page snippets.

To save page snippets as master snippets:

1. In the **Project** panel, select the snippet item.
2. Drag and drop the item to the appropriate folder in the master snippets section of the **Libraries** panel.

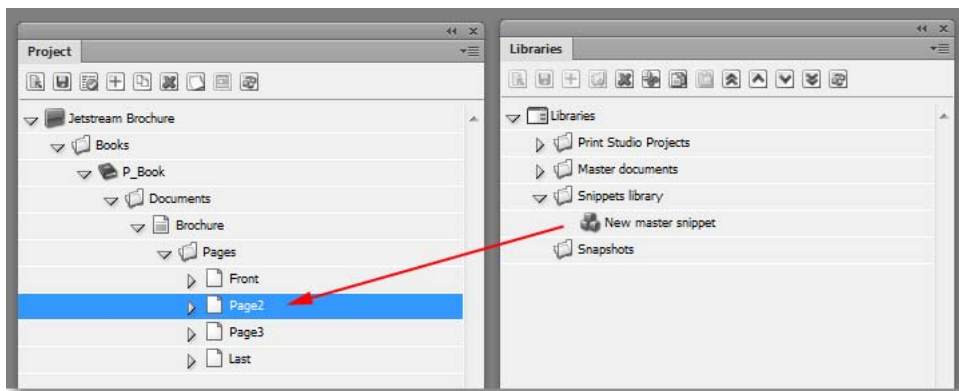


The page snippet is saved to the selected folder as a new master snippet where it is available for later usage.

5.6 Using Master Snippets to Create Page Snippets

To add a page snippet based on a master snippet:

1. In the **Libraries** panel, select the master snippet.
2. Drag and drop it to the page item in the **Project** panel.



3. The snippet is added to the page item and can be published. You can adjust the snippet without changing the master snippet that was used to create the new snippet.

Chapter 6

The Content Panel

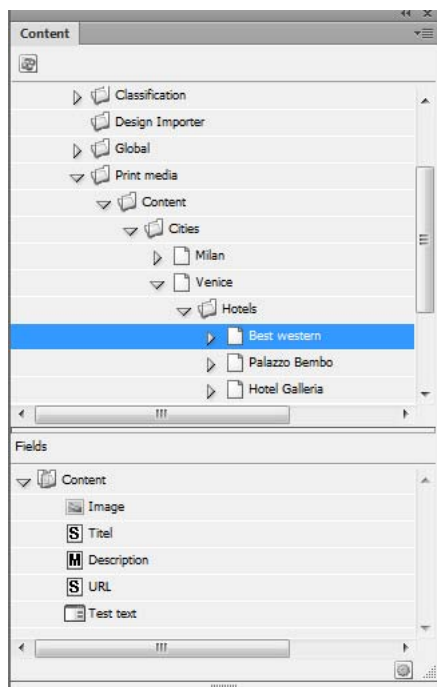
The **Content** panel shows the content structure and items as they are available in Sitecore CMS. You can use the content items to assign items to snippets as described earlier in this document.

This chapter contains the following sections:

- Using Sitecore CMS Items
- Assigning Content
- Finding Assigned Items
- Changing Assigned Fields or Content Items

6.1 Using Sitecore CMS Items

The **Content** panel shows the content structure and items as they are available in Sitecore CMS. The templates attached to the content items are displayed in the bottom half of the **Content** panel. Click a content item to see the template fields that are available.



You can add the fields by simply dragging them to your InDesign page.

To add fields:

1. In the **Content** panel, click the content item to load the fields.
2. Drag the field to your InDesign page.

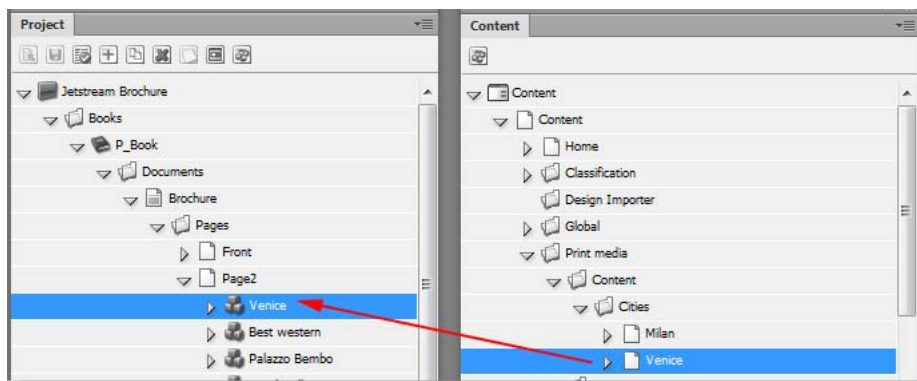
For more information on working with fields to create snippets, see *Adding Dynamic Content*.

6.2 Assigning Content

You can use the content items to assign content to snippets.

To assign a content item to the snippet:

1. Select the content item in the **Content** panel.
2. Drag and drop the content item to the snippet item in the **Project** panel.



The content item is assigned to the snippet item (click **Refresh** if necessary). Now you can publish the page. Then save the page or document.

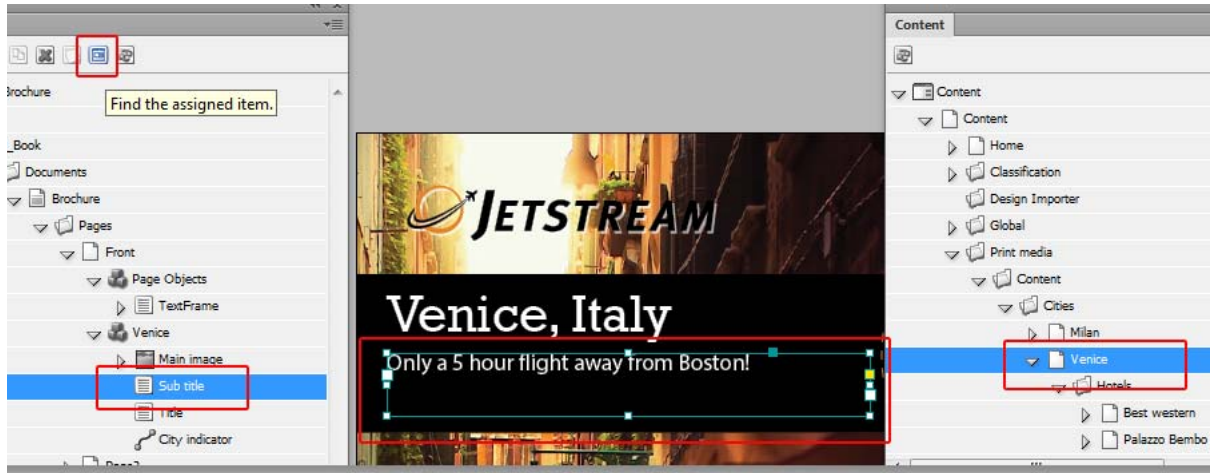
Note

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.

6.3 Finding Assigned Items

To locate the assigned content item:

1. Open the **Project** and the **Content** panel.
2. Select the snippet or item.
3. Click **Find the assigned item**. If the template is available and accessible, the assigned template is selected in the **Content** panel.

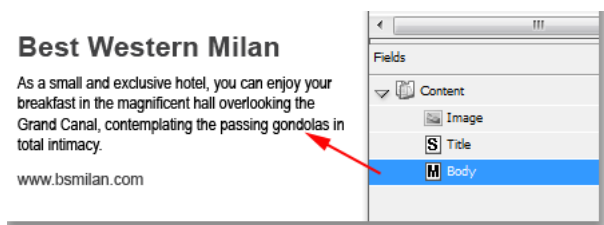


6.4 Changing Assigned Fields or Content Items

To change an assigned field for a text or image frame, simply drag and drop the new field to the frame on the page.

To change the assigned field of a text or image frame:

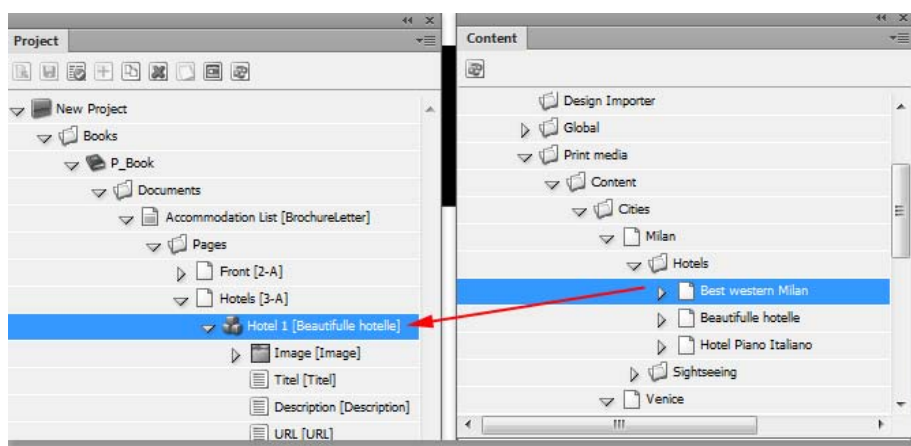
1. In the **Content** panel, select the field.
2. Drag the field to the item.



3. The new field is loaded on the page. Click **Save**.

To change the assigned content item of a snippet or page:

1. From the **Content** panel, drag a new content item to the snippet or page.



2. The new content item is assigned, and its data is loaded on the page. Click **Save**.

Chapter 7

The Media Panel

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

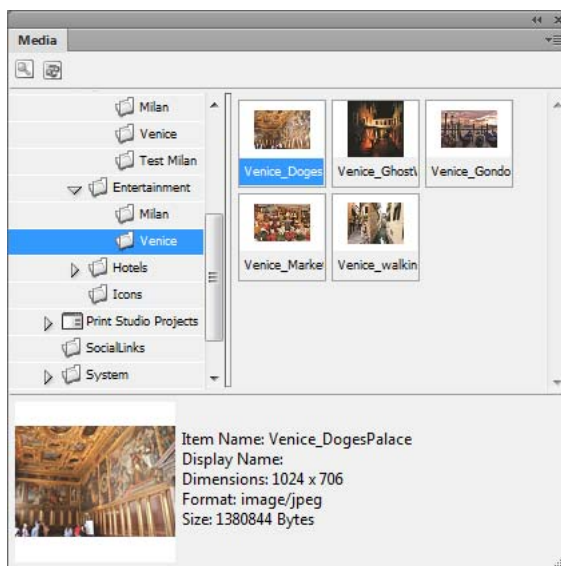
This chapter contains the following sections:

- Browsing the Media Library
- Image Caching
- Placing Images from the Media Library
- Re-assigning Image Items
- Searching for Images

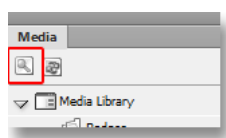
7.1 Browsing the Media Panel

You can use the **Media** panel to browse through the various folders and look for media items. To show the items inside a folder, simply click the folder.

The folder structure is displayed on the left, the media items are displayed as thumbnails on the right, and the details of the selected media item are displayed at the bottom.



The **Media** panel has a search button to help you find the item you are looking for.



7.2 Image Caching

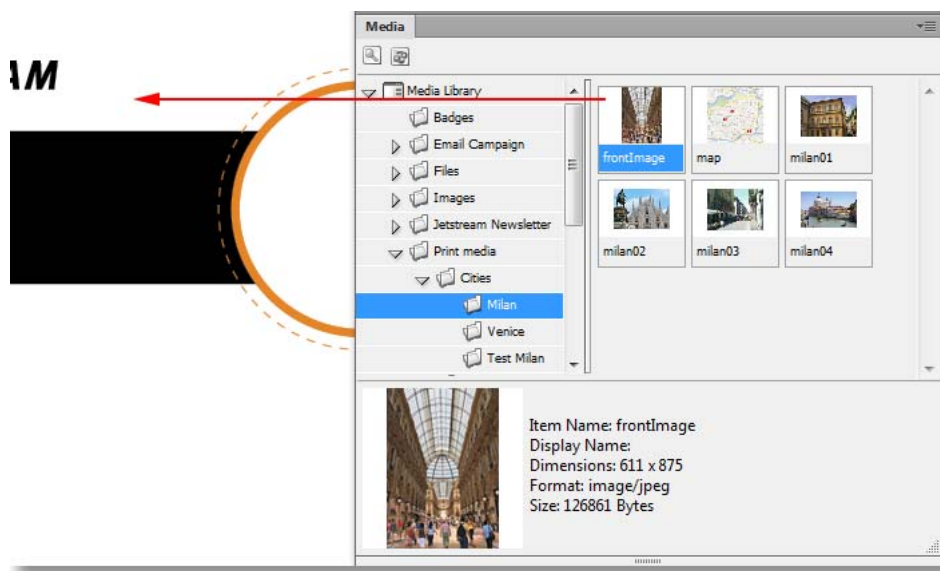
The images you use for your projects are cached on a local hard drive in the image viewer subfolder. This speeds up the loading of the images significantly. To empty the cache of a selected media folder, click **Refresh tree** on the thumbnails list window.

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

7.3 Adding Images from the Media Library

To add an image from the Media Library:

1. Open the **Media** panel and select the image you need.
2. Drag and drop your item on the page.



3. Design the layout.
4. Select the image and drag it to the snippet or the page in the **Project** panel.
5. Click **Refresh** to show the new structure. A new image frame item is added to the snippet with a reference to the selected media item.

Note

You can also save the image by simply creating it on the page and saving the page. Your new image will be saved in a new snippet.

7.4 Re-assigning Image Items

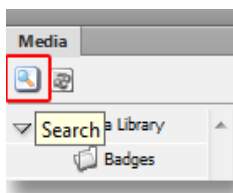
To re-assign an image item to an existing image frame:

1. In the **Media** panel, select the image item you need.
2. Drag and drop the item to the image frame item on the page.
3. Save the page.
4. In the **Project** panel, click **Refresh** to refresh the tree structure.

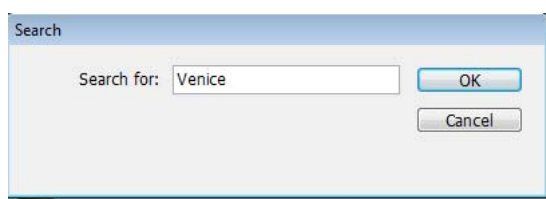
7.5 Searching for Images

To search for a specific image:

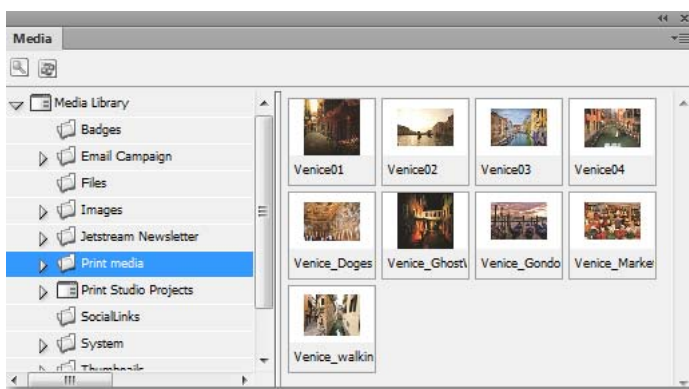
1. In the **Media** panel, select the folder you want to search in.
2. Click **Search**.



3. In the **Search** dialog box, enter a description or part of a description of the image that you want to search for.



4. Click **OK** to start the search.
5. The images that match the search criteria are displayed in the thumbnails browser on the right.



Chapter 8

The Workbox

This chapter describes the workbox of the InDesign Connector. The workbox shows the InDesign project items that are in a workflow stage and need the attention of the user.

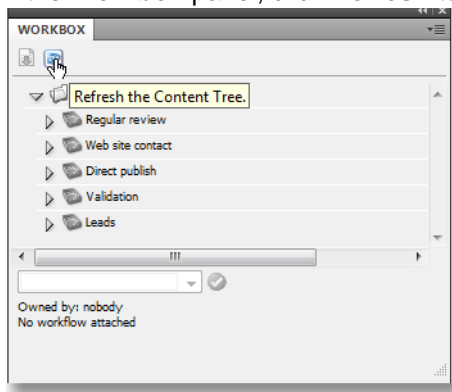
This chapter contains the following sections:

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

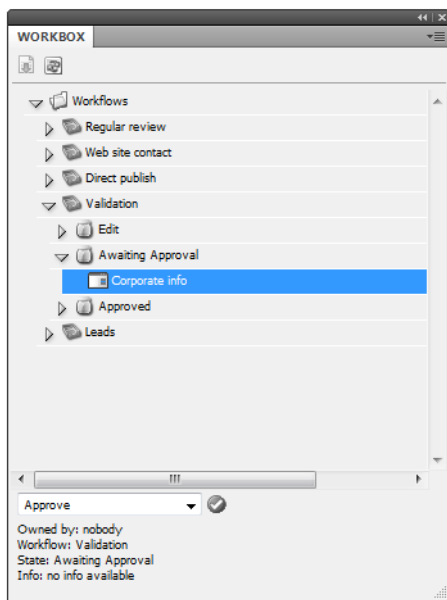
8.1 Introduction

The workbox in InDesign Connector is similar to the workbox in Sitecore. It shows the InDesign project items that are in a workflow stage and need attention.

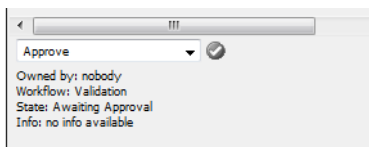
1. In the **Workbox** panel, click **Refresh** to load the workflow items:



2. Select an item in a workflow stage:

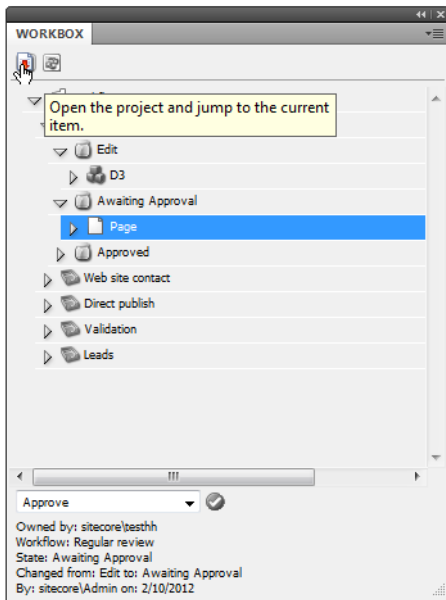


The workflow info is displayed at the bottom of the panel.



8.2 Opening Project Items From the Workbox

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



8.3 Using Content Items and Media Items from the Workbox

Content items that appear in the **Workbox** 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.

8.4 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 click **Submit**.

