STIBO SYSTEMS
MASTER DATA MANAGEMENT

USER GUIDE

Publisher

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Publisher (Adobe InDesign Integration)

This documentation section details the Publisher component (also referred to as STEP'n'design) and the associated Proof View, AutoPage, and Flatplanner print publishing components.

Note: Supported versions of Adobe InDesign are CC 2022 (CC17), CC 2021 (CC16), CC 2020 (CC15), and CC 2019 (CC14).

Topics in this Guide

The topics covered in this documentation section are:

- Publication Hierarchy
- Publisher (STEP'n'design)
- Proof View
- AutoPage
- Flatplanner

Prerequisites

This documentation section assumes that users have a basic understanding of the MDM platform (STEP) and a working knowledge of InDesign. Instructions on how to use InDesign itself are outside the scope of this documentation, except where required to explain how InDesign's standard functionality interacts with the STEP'n'design plugin. This documentation also assumes an understanding of Asset Pushes. For more information, see the **Asset Push** topic in the **Digital Assets** documentation.

Licenses

To access Publisher functionality, the following **licenses** must be installed on your system. Contact your account manager or partner manager to begin the process of enabling a license or licenses for your system.

- STEPPublish
- STEPPublish.InDesign

To use InDesign **server** plugins, which are needed to access Proof View functionality and the AutoPage and Flatplanner components, an InDesign server must also be connected to your STEP system and the following licenses installed. For more information on the deployment of an InDesign server, contact your Stibo Systems account manager.

- STEPPublish.ServerSide
- STEPPublish.ServerSide.InDesign

Publication Hierarchy

This section covers information specific to the green publication hierarchy in STEP and the publication objects that it contains. This hierarchy is used when working with publications. For general object maintenance information (applicable to all object types rather than specific to publication objects), see the **All Objects** topic in the 'Object Maintenance' section of the **Getting Started** / **User Guide** documentation.

Before generating InDesign pages from STEP through any of the **STEP Publisher** components—STEP Publisher (standard 'drag and drop', also known as STEP'n'design), Flatplanner, AutoPage, or in a publishing Web UI—it is necessary to build a publication hierarchy (green hierarchy) in the STEP Workbench.

The topics in this section describe how to manually create the necessary objects in the **Tree** that compose a standard publication hierarchy. Instructions are also included for duplicating a publication and linking products, assets, and classifications to nodes (publications and sections) in the publication hierarchy.

Before creating any of the objects detailed in this section, you must first ensure that all relevant object *types* for the publication hierarchy have been created in System Setup. Instructions on how to create and configure these object types are detailed in the **Creating a Standard Publication Object Type Hierarchy** section of the **System Setup** / **Super User Guide** documentation.

A publication hierarchy can also be built by importing a STEPXML or Publication Excel file. Details on these more automated methods of creating a publication hierarchy are not included in this section. For more information, see the following sections of the **STEP Publisher** documentation:

- Exporting and Importing Publications in STEPXML
- Importing Publications in Excel

Publication Hierarchy Elements

The following is a list of the publication hierarchy elements in STEP.

Element	Icon	Description
Publication group		A publication group is a container for publications and templates (product, publication, and page).
Publication		A publication is a collection of the different versions and sections of a publication.
Commercial data		The commercial data folder stores commercial data lists and is automatically generated when a publication is created. For more information, see the **Commercial Data** section of the **STEP Publisher (InDesign)** documentation.
Commercial list		Commercial data lists. The currency icon (top icon on the left) is typically used for price lists, while the generic list icon (bottom icon on the left) can be used for any type of commercial data values. For more information, see the **Commercial Data** section of the **STEP Publisher (InDesign)** documentation.
Version		Publication versions hold different variants of the same publication. Each publication can have one or more versions that specify a specific context, workspace, and one or more commercial lists, if applicable.
Section and subsection		A section is a container for subsections and DTP (InDesign) documents. Additionally, products, assets, and/or classifications are linked into sections from the Tree to organize content for the publication.
DTP documents		DTP documents are InDesign pages that have been finalized and saved back to STEP.
DTP page		A page within the DTP (InDesign) document.
Publication Template		InDesign documents that serve as the foundation of publications created with STEP. They define the document size, margins, paragraph styles, character styles, table rules, swatches, page numbers, and so forth that are used throughout a publication.
Product Template		InDesign documents that are used with publication templates to roughly plan the layout of finalized pages and organize the STEP attributes, assets, tables, and additional

Element	Icon	Description
		stylistic elements that comprise product presentations.
Page Template		Templates created in STEP that determine the frame layout of Flatplans. *(Flatplanner only)*
Planned page (spread)		Page designer tool used in Flatplanner, where page template frames are applied. Can be single pages or double pages. When using double pages, the planned page is referred to as a **spread**. *(Flatplanner only)*

Creating a Publication Group

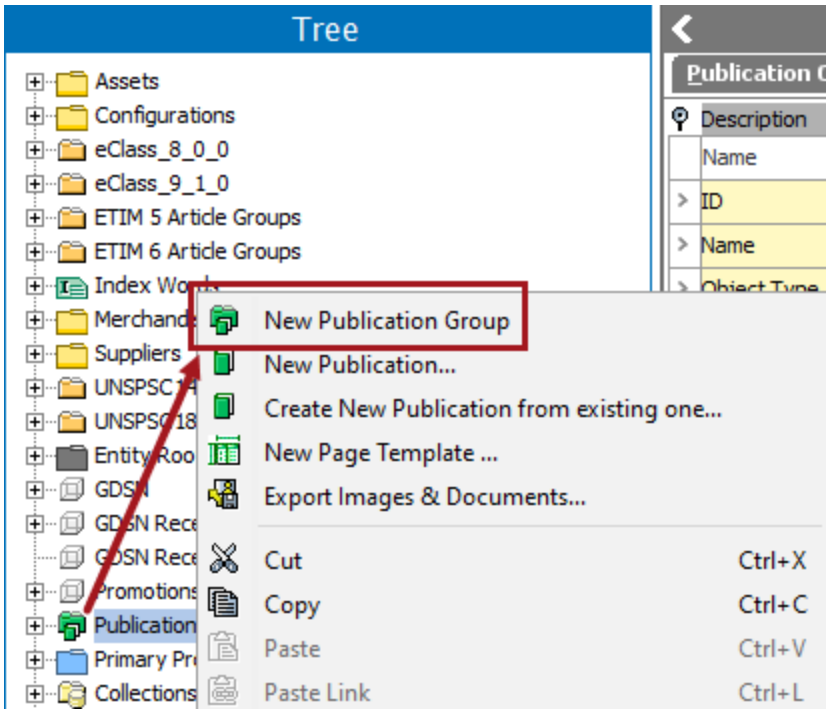
Creating a publication group in the STEP Workbench is the first step in creating a publication after all necessary publication-related object types have been configured in System Setup. Publication groups not only serve as the parent nodes of publications, but at least one publication group must exist before publication templates and product templates can be saved back to STEP.

Note: Unless created by Excel or STEPXML import, publications cannot be created in STEP until at least one publication template and one product template has been saved back to the workbench. For instructions on how to configure and save these templates into STEP, see the **Templates in STEP Publisher** topic in the STEP Publisher documentation.

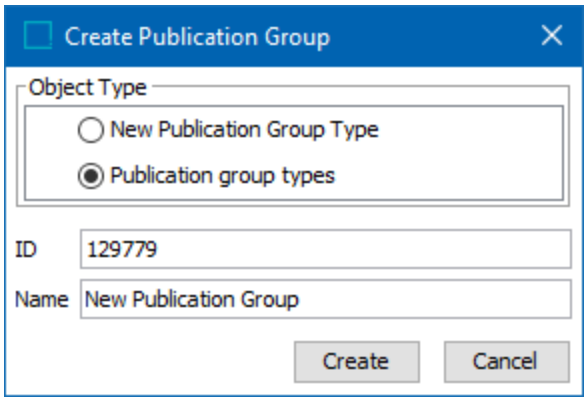
Steps to Create a Publication Group

1. In the **Tree**, click on the top level of the publication hierarchy (green tree node). The standard ID of this root node is **Publication hierarchy root**. If this root node does not exist on your system, contact Stibo Systems for assistance.

2. Right-click and select **New Publication Group**.

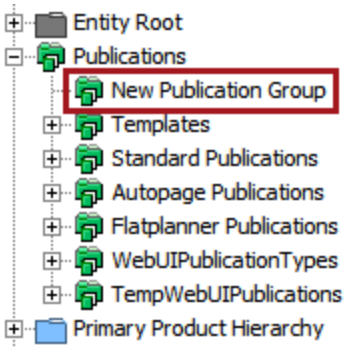


3. In the **Create Publication Group** dialog box that displays, click the relevant **Object Type**, if applicable.



Note: In order to choose an object type for your publication group, these object types must first be defined in System Setup. For more information, see **Creating a Publication Group Object Type** in the **System Setup / Super User Guide** documentation.

4. Type an ID in the **ID** field if the STEP ID for your publication group object type has not been set to autogenerate with an ID Pattern in System Setup. (The preceding screenshot shows an ID that has been created automatically.)
5. In the **Name** field, type a name for the publication group.
6. Click **Create**. The publication group is created.



A Note on Revisability

Publication groups objects are globally revisable, meaning that they are the same in both the Main and Approved workspaces. Each time a change is made by a different user, a numbered revision is created and logged.

Creating a Publication

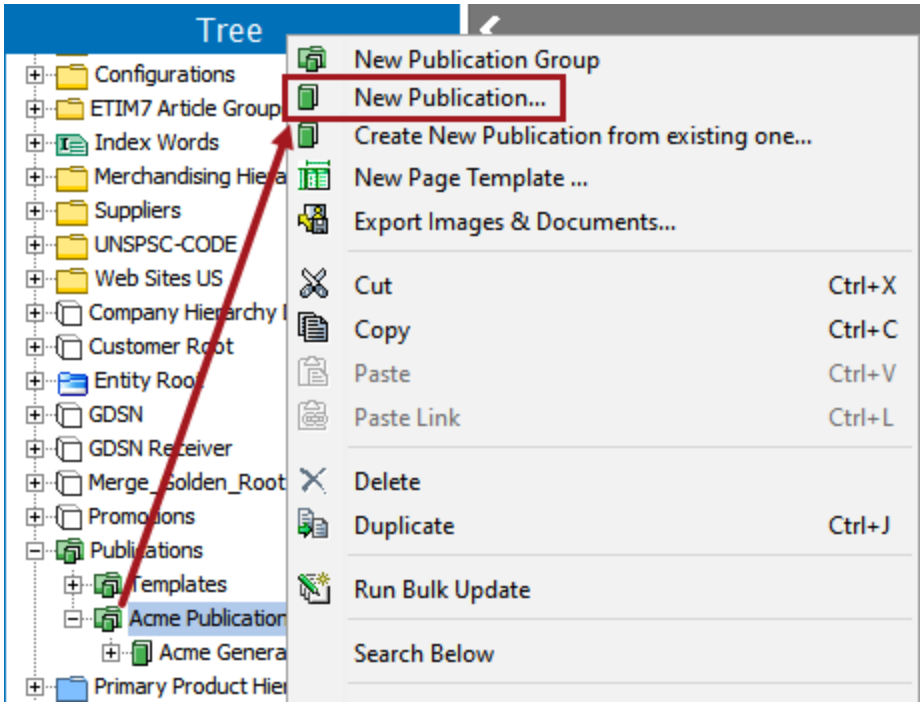
Publications are created in the green publication hierarchy in the Tree by the same basic process whether the publication will be used for standard STEP Publisher publishing ('drag and drop'), AutoPage, or Flatplanner.

Unlike the more straightforward method of creating objects in the Product or Classification hierarchies, all publications require the linkage of two types of STEP Publisher templates: **publication templates** and **product templates**. Flatplanner publications require three template types: publication templates, product templates, and **page templates**. These templates must already be saved in STEP before a publication can be created.

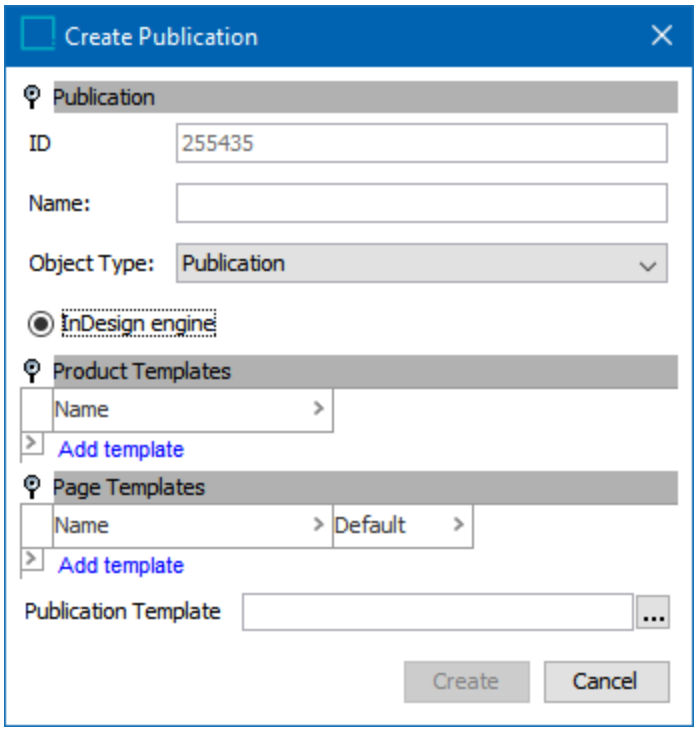
Though publications can be imported in STEPXML or Publication Excel formats, it is recommended to create your first publication in STEP manually. Once created, this publication can be exported to produce a 'template' spreadsheet that can be used for later publication imports.

Steps to Create a Publication Manually in the Workbench

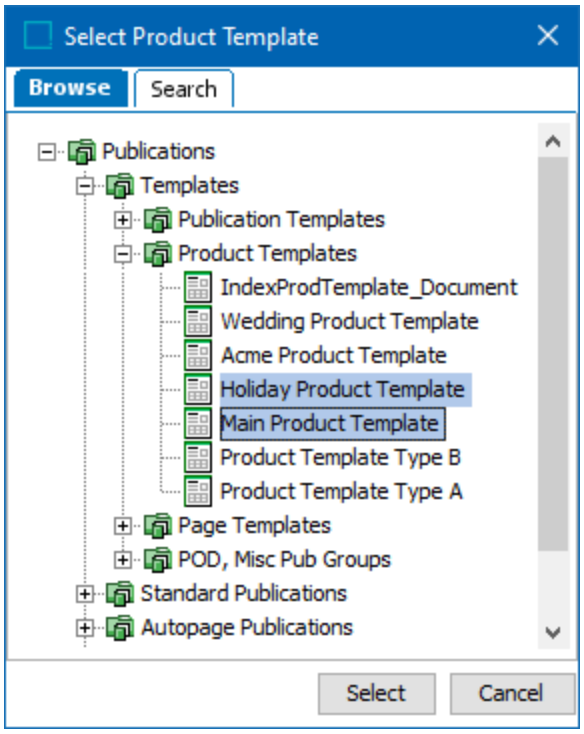
1. In the **Tree**, open the top-level node of the publication hierarchy, then navigate to the publication group object in which you would like to create your publication.
2. Right-click this publication group object and select **New Publication**.



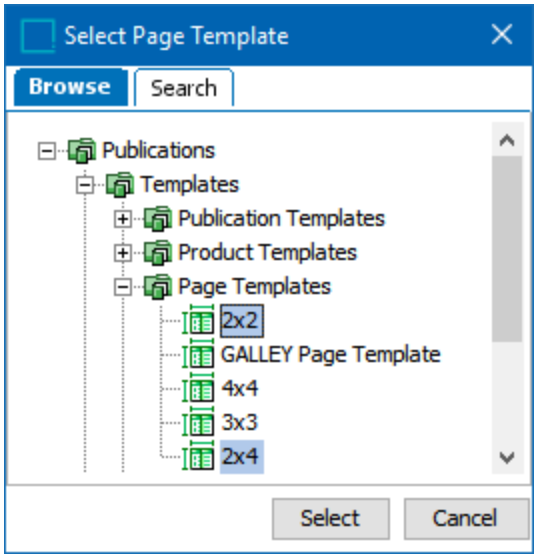
3. A **Create Publication** dialog box displays.



4. If the STEP ID for your publication object type has not been set to autogenerate with an ID Pattern in System Setup, type an ID in the **ID** field. (The preceding screenshot shows an ID that has been created automatically.)
5. In the **Name** field, type a name for the publication (a name is required for publications).
6. In the **Object Type** list, select a publication object type (only applicable if more than one publication object type has been created in System Setup).
7. Only one choice of engine is available—**InDesign engine**.
8. Under the **Product Templates** flipper, click **Add template**.
9. In the **Select Product Template** dialog that displays, either search for or browse to the product template(s) that you would like to use in your publication. To select more than one template, hold the Ctrl or Shift key while making selections. Click **Select** when finished.

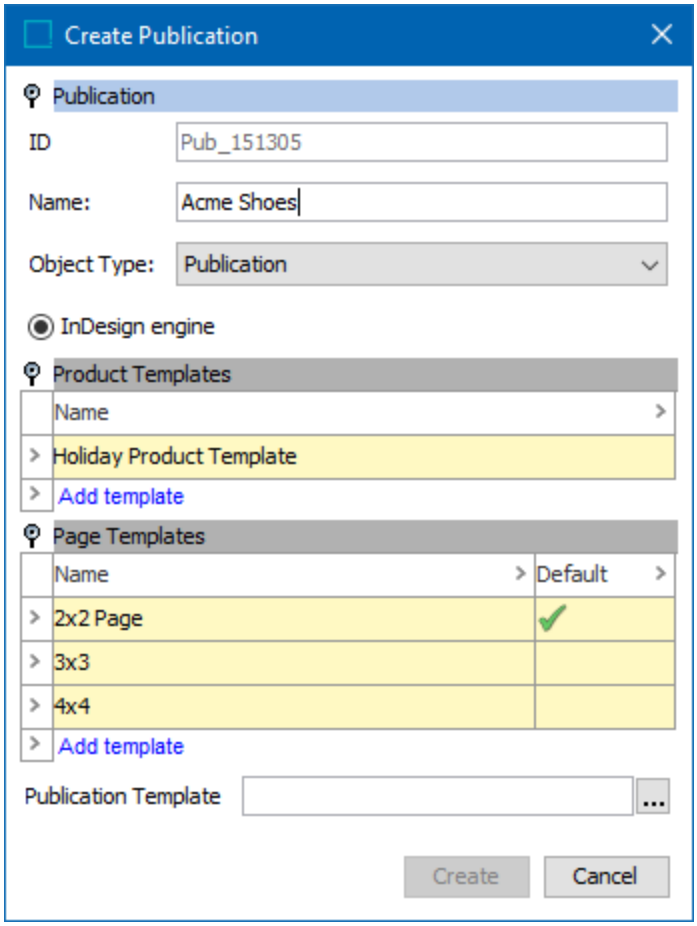


10. *(For Flatplanner publications only)* Under the **Page Templates** flipper, click **Add template**. A **Select Page Template** dialog displays. Either search for or browse to the page template(s) that you would like to use in your publication. To select more than one template, hold the Ctrl or Shift key while making selections. Click **Select** when finished. (You can add page templates after creating the publication if the page templates are not already in STEP.)



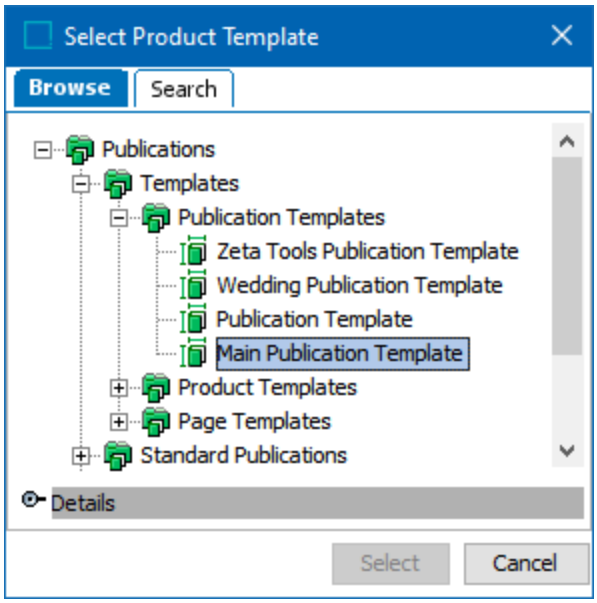
- A green check mark will appear next to the first page template to indicate that it is the default page template for the publication. To change the default template, click in the empty **Default** cell next to the page template

that you would like to make default.

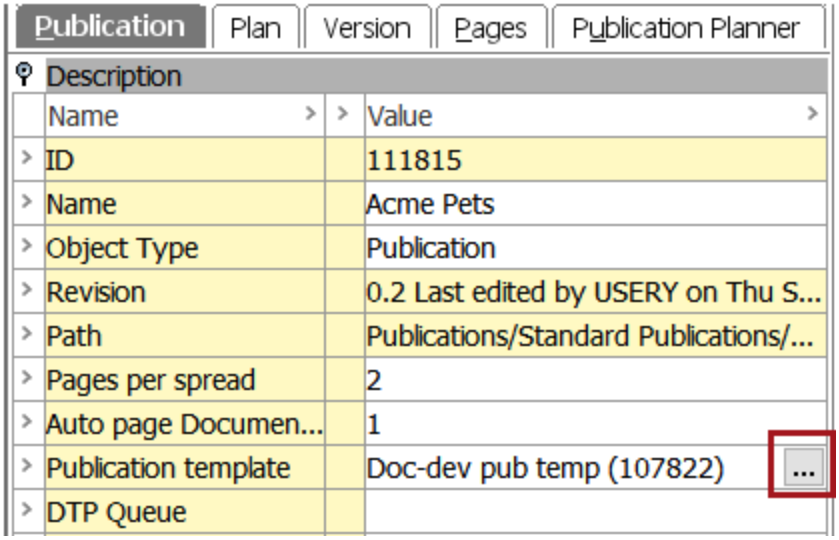


11. In the **Publication Template** field, click the ellipsis button (...). A **Select Publication Template** dialog appears. Either search or browse for the publication template that you would like to use in your publication. Click **Select** when finished.

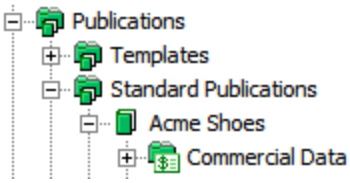
> **Note:** Only one publication template is allowed per publication, as it is the master reference for all page sizes, paragraph styles, object styles, character styles, colors, and table rule settings in your publication.



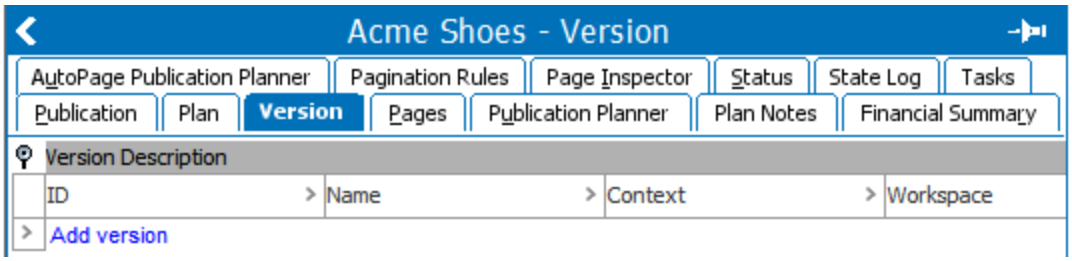
- If you need to change the publication template after you create the publication, you can do so by selecting your publication in the tree, and then click the ellipsis button (...) in the Publication template field on the Publication tab.



12. Click **Create**. The publication will now be created together with a **Commercial Data** folder. The Commercial Data folder is created by default with every publication object. Though it cannot be deleted, it will not negatively impact the publication if it remains empty. For information on Commercial Data, see the **Commercial Data** section of the **STEP Publisher** documentation.



13. Once the publication is created, the system will automatically route to the **Version** tab.



14. Before proceeding further with publication creation, you must create at least one publication **version**. For instructions on creating a version, see the **Publication Versions** topic.

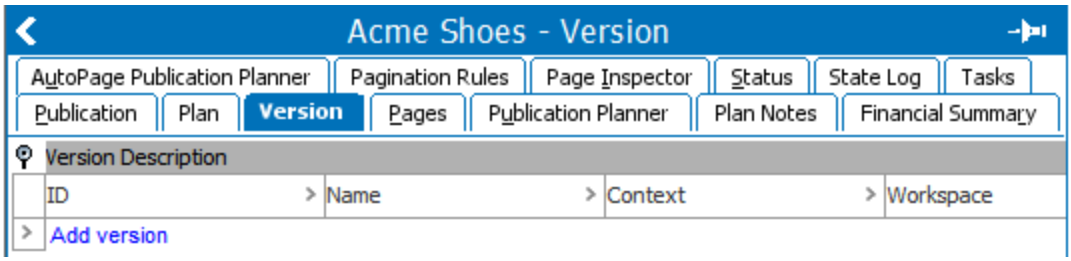
Publication Versions

Once a publication object has been created, the next step in completing a publication is to create at least one **version**. Publications need at least one version to define the context(s) and workspace(s) that will be used within the publication. One reason to create multiple versions is when there are multiple languages being used within the same publication. For example, if the publication will be published in five languages, then five versions will be created. Versions may also be created for different currency zones, vertical markets, or types of catalog.

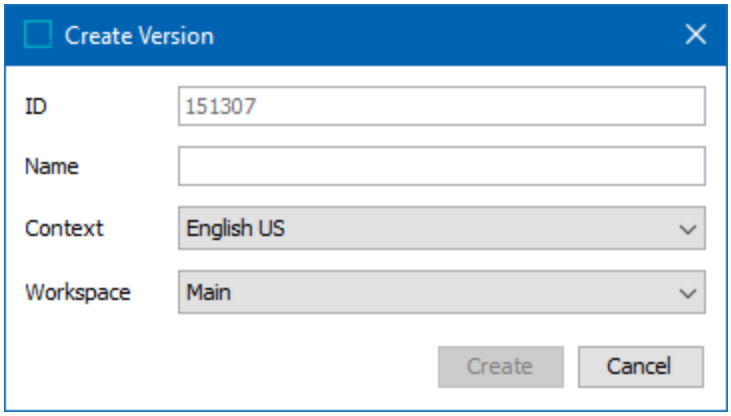
Note: Publication sections cannot be created until at least one version has been defined.

Creating a Version

1. In the **Tree**, open the top-level node of the publication hierarchy, then navigate to the publication in which you would like to create your version.
2. Select the **Version** tab. The **Version Description** flipper displays.



3. Click **Add version**. A **Create Version** dialog box displays.

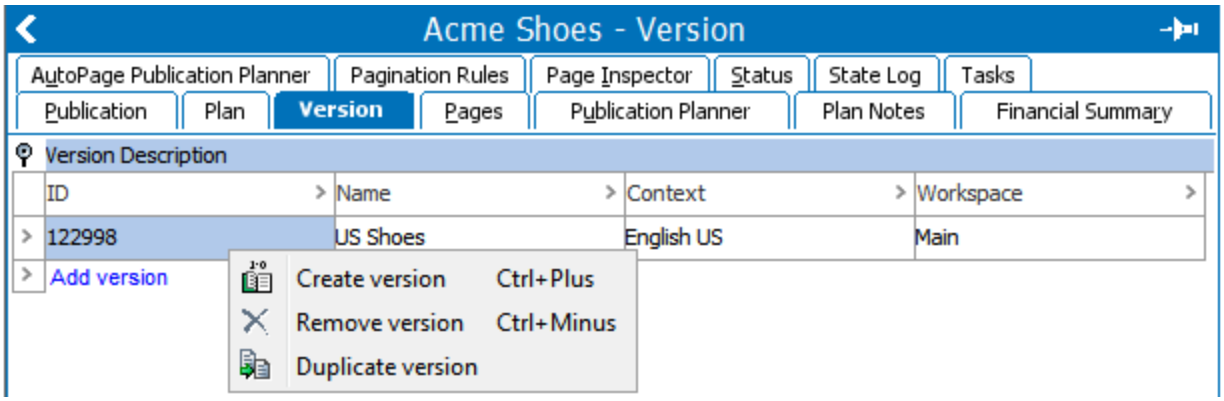


4. If the STEP ID for the 'Publication Version' object type has not been set to autogenerate with an ID Pattern, type an ID in the **ID** field.
5. In the **Name** field, type a name for the version.

6. From the **Context** dropdown list, select the context from which the product data should be published.
7. From the **Workspace** dropdown list, select the workspace from which the product data should be published.
8. Click **Create** to create the version.
9. Create the number of versions needed by repeating steps 1 - 9 or by duplicating the version you just created. Note that the name, context, and workspace can be changed after creating a version.

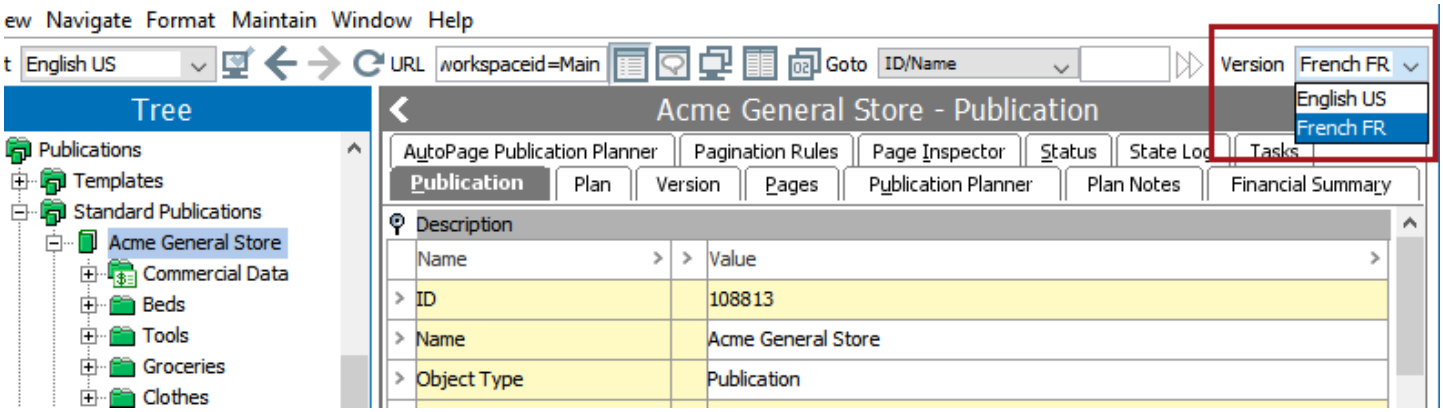
Removing or Duplicating a Version

1. To remove a version, right-click on the version that you want to remove from the publication, then select **Remove version**. The version will be removed.
2. To duplicate your version, right-click on the version that you want to duplicate, then select **Duplicate version**. The version will be duplicated.

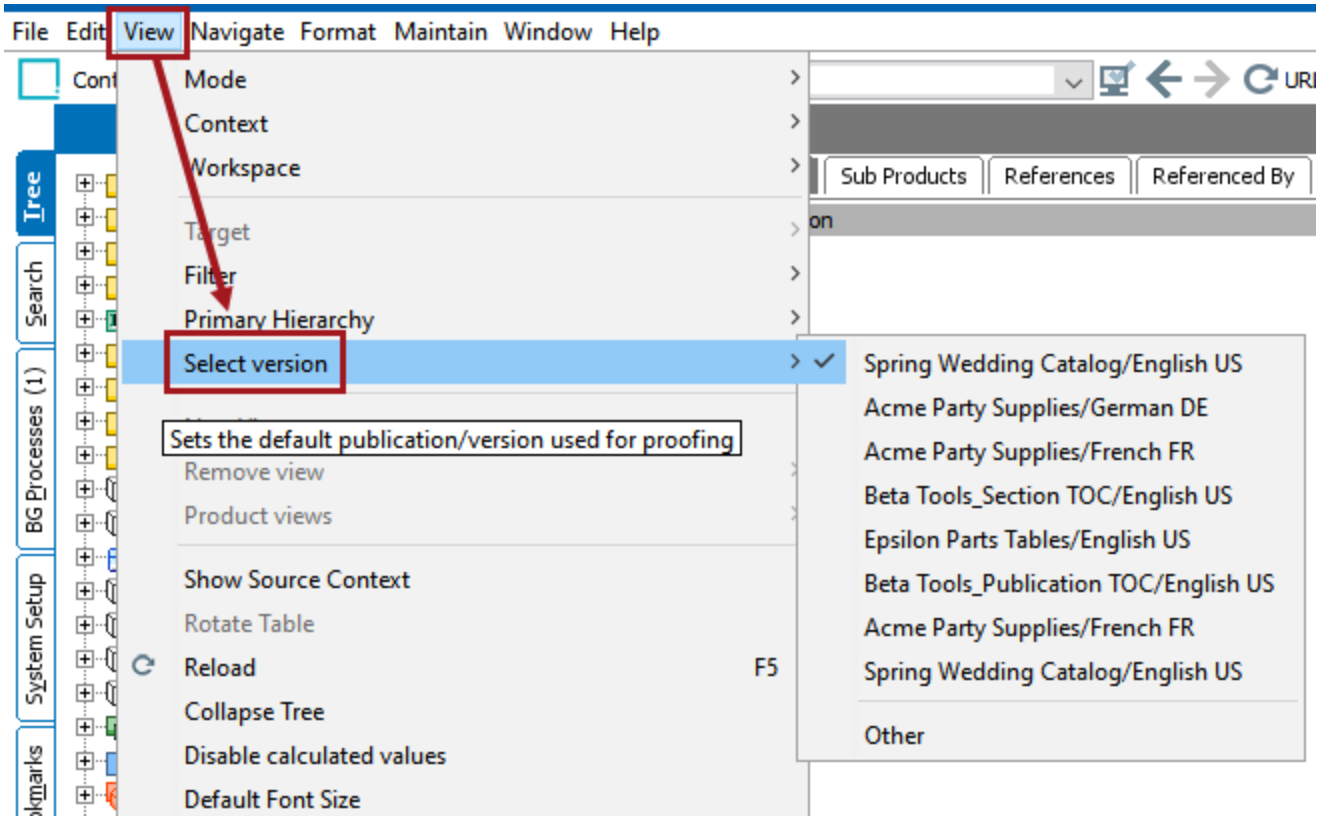


Viewing Versions

All versions that have been created for the publication can be viewed in the Version dropdown list in the top right corner of the workbench. This is used for reviewing the different contexts in the Flatplanner, for example.



The current version can also be changed by navigating to View > **Select version** in the menu bar.

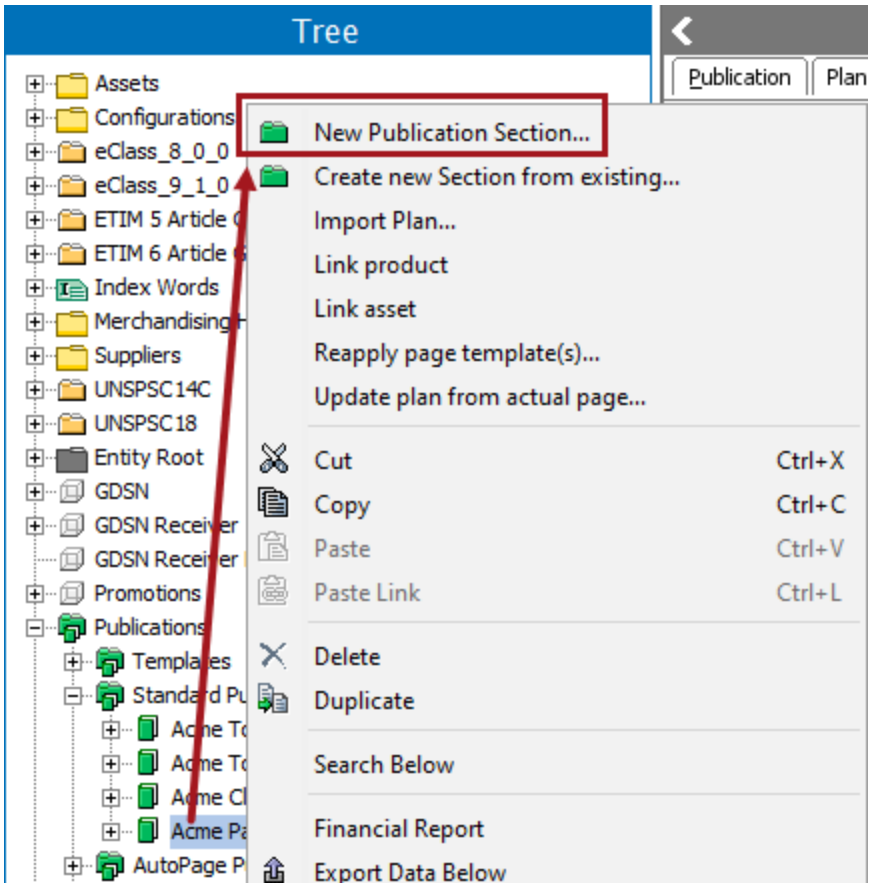

File Edit View Navigate Format Maintain Window Help
Mode
Context
Workspace
Target
Filter
Primary Hierarchy
Select version
Sets the default publication/version used for proofing
Remove view
Product views
Show Source Context
Rotate Table
Reload F5
Collapse Tree
Disable calculated values
Default Font Size
Spring Wedding Catalog/English US
Acme Party Supplies/German DE
Acme Party Supplies/French FR
Beta Tools_Section TOC/English US
Epsilon Parts Tables/English US
Beta Tools_Publication TOC/English US
Acme Party Supplies/French FR
Spring Wedding Catalog/English US
Other
Sub Products
References
Referenced By
Tree
Search
BG Processes (1)
System Setup

Creating a Section

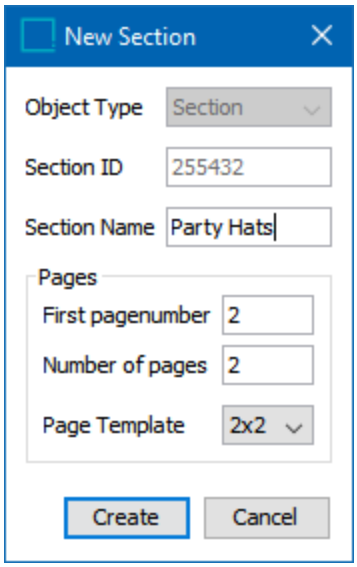
After creating a publication object with at least one version, the next step in completing your publication is to create at least one **section**. Sections are required for storing mounted (actual) InDesign pages in STEP as well as creating Flatplanner planned pages (spreads).

Steps to Create a Section

1. In the **Tree**, open the top-level node of the publication hierarchy, then navigate to the publication object in which you would like to create your section.
2. Right-click this publication object and select **New Publication Section**.

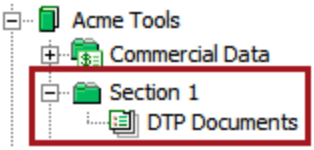


3. In the **New Section** dialog that displays, select the relevant section **Object Type** (only applicable if more than one section object type has been created in System Setup).



4. In the **ID** field, type the ID of the section (if not generated automatically).
5. In the **Section Name** field, type a name for your section. If no name is provided, STEP will automatically name the section with the STEP ID of the section surrounded by parentheses, e.g., (123005).
6. If your system does not contain the **Flatplanner** publishing component, no additional configuration steps are required. Click **Create** to create the section.

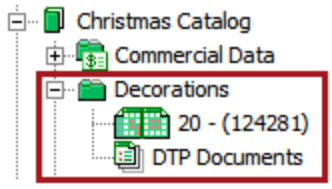
   The **DTP Documents** node is automatically created along with sections. The DTP Documents node is used to store mounted (actual) InDesign pages in STEP.



Additional Steps for Flatplanner Publications

For systems that contain the Flatplanner publishing component, the fields within the **Pages** section of the **New Section** dialog must be populated before the section can be created.

1. In the **First pagenumber** field, type the page number at which the planned pages in the section should begin. (For new sections, the default page number is 1. For subsequent sections in the same publication, the page number will pick up after the last page number in the previous section.)
2. In the **Number of pages** field, type desired number of planned pages that should be created along with the section.
3. In the **Page Template** dropdown, choose the page template that should be used for the planned pages in the section. To create a section without any planned pages, enter '0' for **Number of pages**. (Note that planned pages cannot be named at the time sections are created. If names are required, they must be added after the planned pages have been created.)



Note: It is also possible to add sections to a Flatplanner publication using the **Publication Planner**. For more information about the Publication Planner, see **Inserting Sections in the Publication Planner** in the **Flatplanner** documentation.

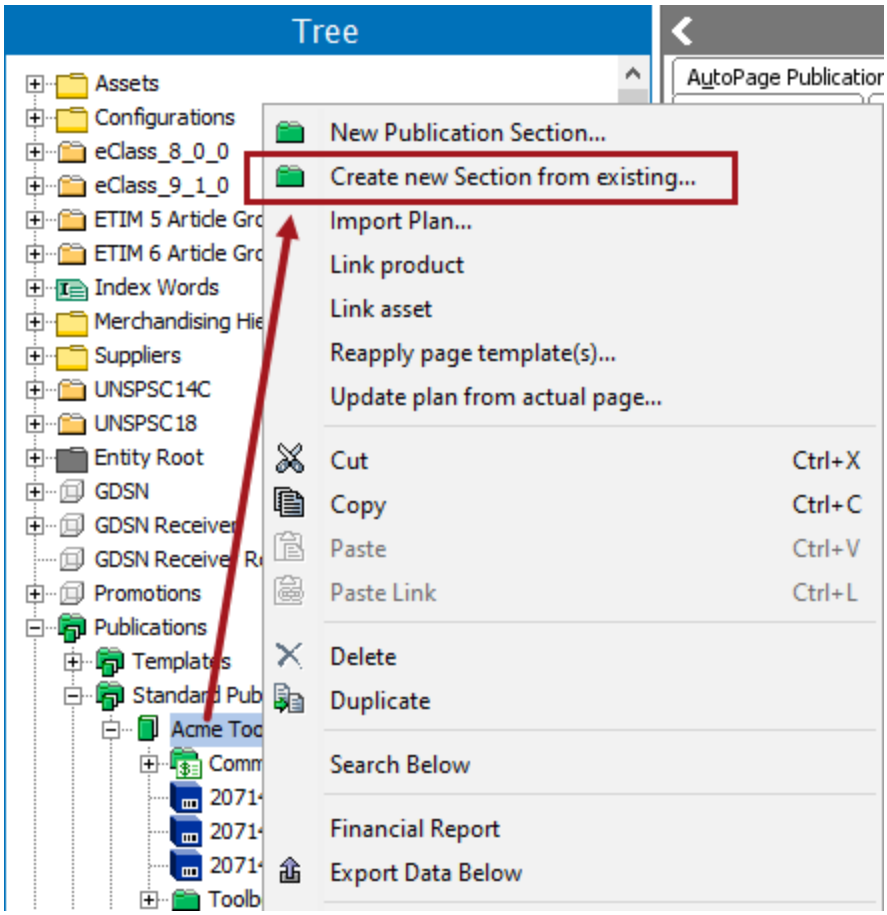
Create a New Section From Existing

Creating a new section from an existing section is a useful feature that can help reduce time spent on manual tasks such as:

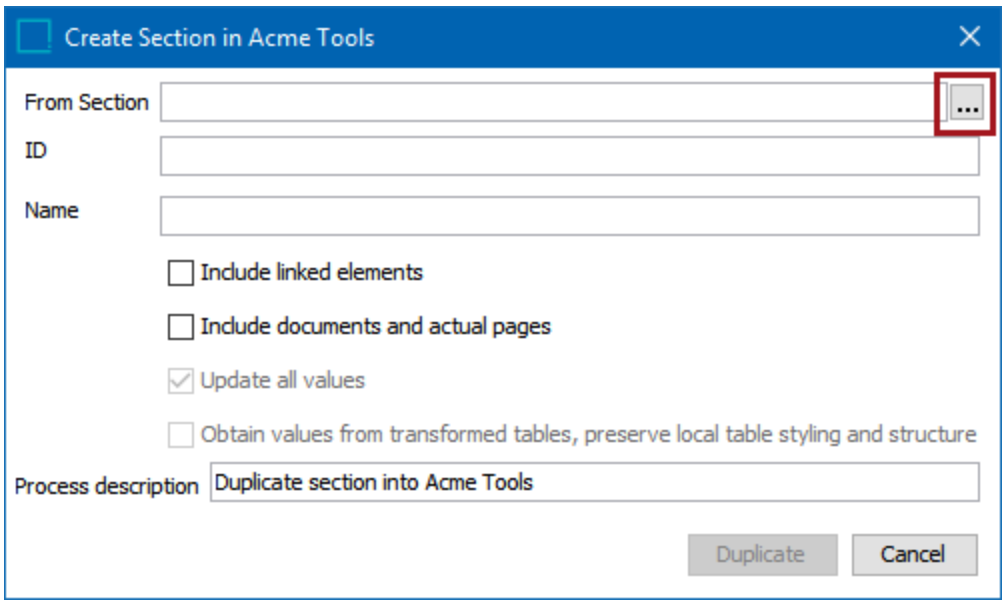
- Reassigning of product templates on Flatplanner pages
- Remounting of attribute values on pages
- Re-saving of InDesign pages into STEP

Steps to Create a New Section From Existing

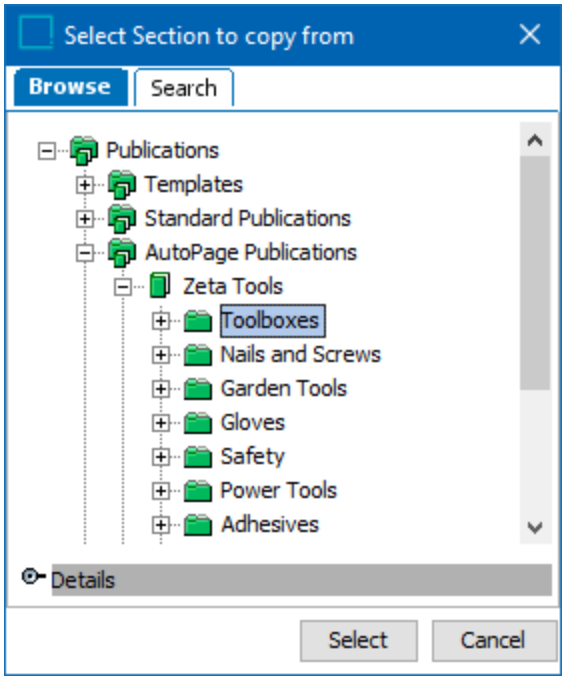
1. In the **Tree**, navigate to the publication or section where you would like to create the new section.
2. Right-click and select **Create new Section from existing…**.



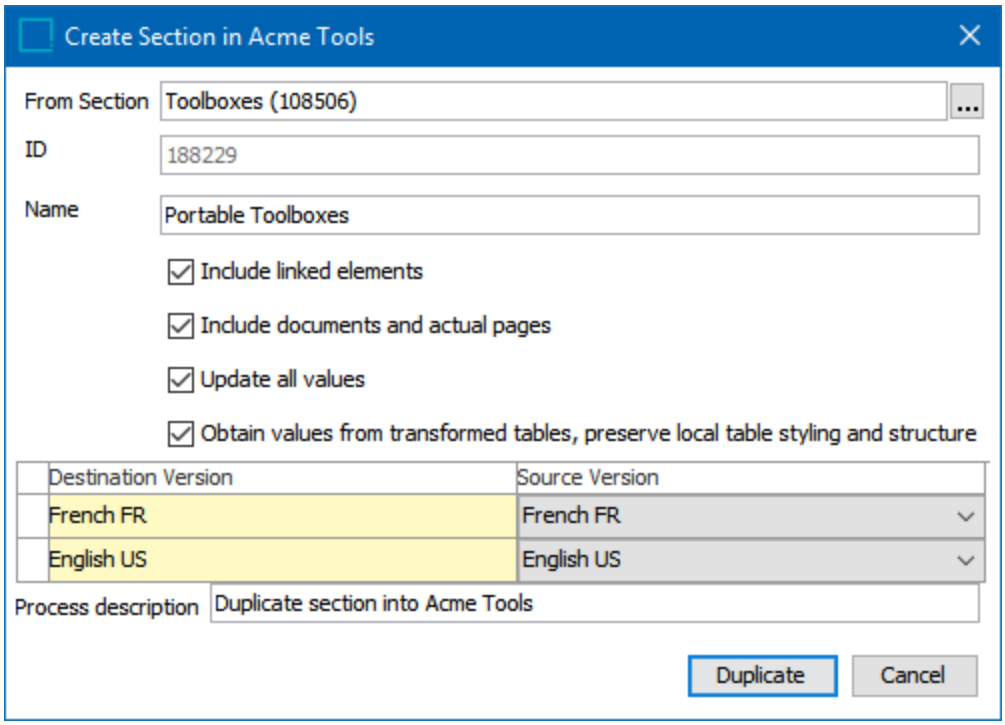
3. In the **Create Section** dialog that displays, click the ellipsis button (...) by the **From Section** field, or, type the name or ID of the section into this field.



4. In the **Select Section to copy from** dialog, browse to or search for the relevant section, then click **Select**.



5. Type an ID in the **ID** field if the STEP ID for your section object type has not been set to autogenerate with an ID Pattern in System Setup. (The following screenshot shows an ID that has been created automatically.)
6. Type a name for the section in the **Name** field.
7. Select **Include linked elements** to carry over the product and asset objects that are linked to the source section.
8. To keep all mounted (actual) pages from the original section, select **Include documents and actual pages**. (For Flatplanner publications, a duplicated section will still contain all *planned* pages even if this checkbox is not selected.)
9. If **Include documents and actual pages** is selected, the **Update all values** checkbox is activated and the **Destination Version** and **Source Version** options display.
10. Under **Source Version**, choose the relevant publication version (from the source section) from the dropdown list(s). This will essentially 'map' the actual pages from the source section into the relevant destination version in the destination section.



11. Check **Update all values** if you would like the actual (mounted) pages in the new section to be updated with all changes made to attribute values in STEP since the time that the original pages were mounted.

> **Note:** 'Update all values' will update *all* attributes from the original section. There is no way to choose a subset of attribute values to update when duplicating a section.

12. The checkbox for **Obtain values from transformed tables, preserve local table styling and structure** is activated if **Update all values** is selected. Select **Obtain values from transformed tables, preserve local table styling and structure** if the following statements apply:

    - Mounted tables exist on the actual pages of the original section
    - Attribute values within these tables have changed in STEP since the original section was created
    - You would like to update the values contained in the table cells but do *not* want to completely remount the tables

    Updated table cell values will be populated as they exist in the resolved table in STEP, i.e., the way the table appears in STEP after all transformations have been applied.

> **Note:** Any *new* transformations applied to tables since the original section was created will not be applied to the updated tables in the new publication.

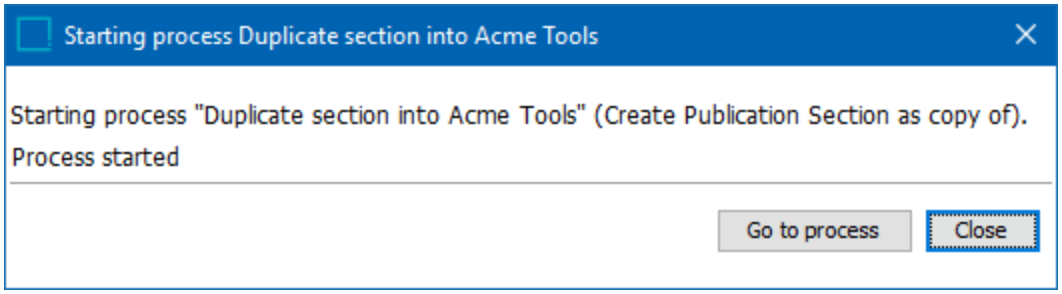
If **Obtain values from transformed tables, preserve local table styling and structure** is *not* selected, all tables will be remounted in the new section. Remounting a table will update the tables with any changes made in STEP but will also cause the loss of any manual table formatting that was applied to the tables in the

original section. Manual formatting includes changes such as the adjustment of column widths or addition of background shading to cells.

If the actual structure of a table itself has changed in STEP since the table was mounted in the original section, the table will be remounted in the new section regardless of whether **Obtain values from transformed tables, preserve local table styling and structure** is checked or not. A basic example of a structural change to a table is the addition or removal of a row or column.

> **Note:** A configuration property can be set to allow values to update in tables—without remounting—even if structural changes are present. For more information, see the **Preventing the Remount of Structurally Different Tables in Duplicated Publications** section of the **Duplicating a Publication** topic.

13. In the **Process description** field, you may enter a name for the background process that will run when starting the duplication, though a name is not required.
14. Click **Duplicate**. A 'Create Publication Section as copy of' background process starts and a **Starting process** dialog box appears.

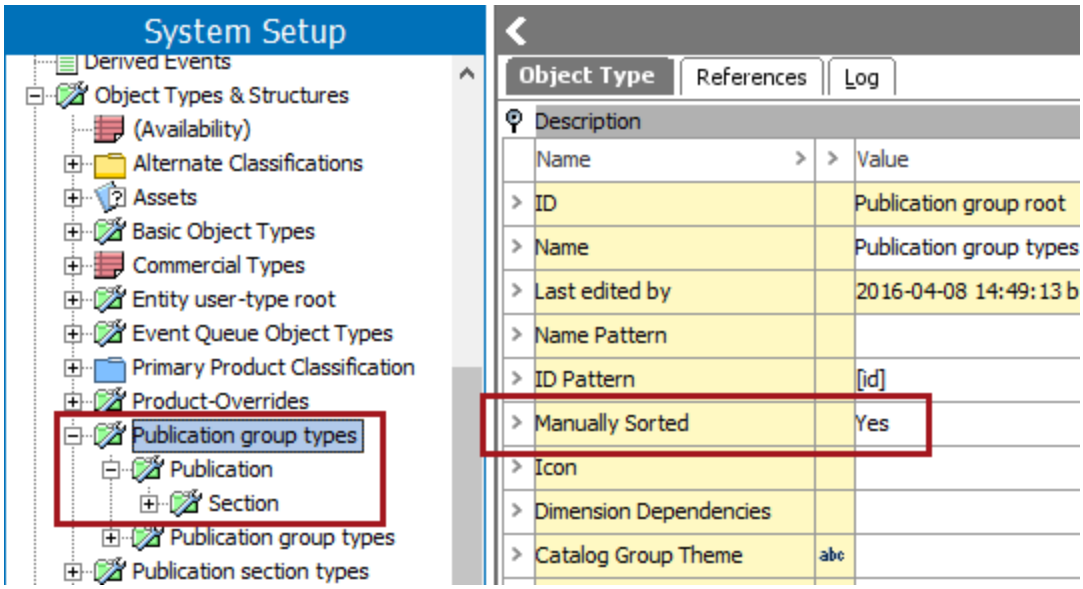


15. Click **Go to process** to monitor the background process or click **Close** to exit the dialog (the background process will still run).
16. Once the background process has finished, the new section can be found as a child object inside the publication or section from which the duplication process was started.

Organizing Publication Sections in the Workbench

Sections and subsections in publications can be manually organized in the Tree through simple drag-and-drop operations as long as the following object types are set to **Manually Sorted** = Yes:

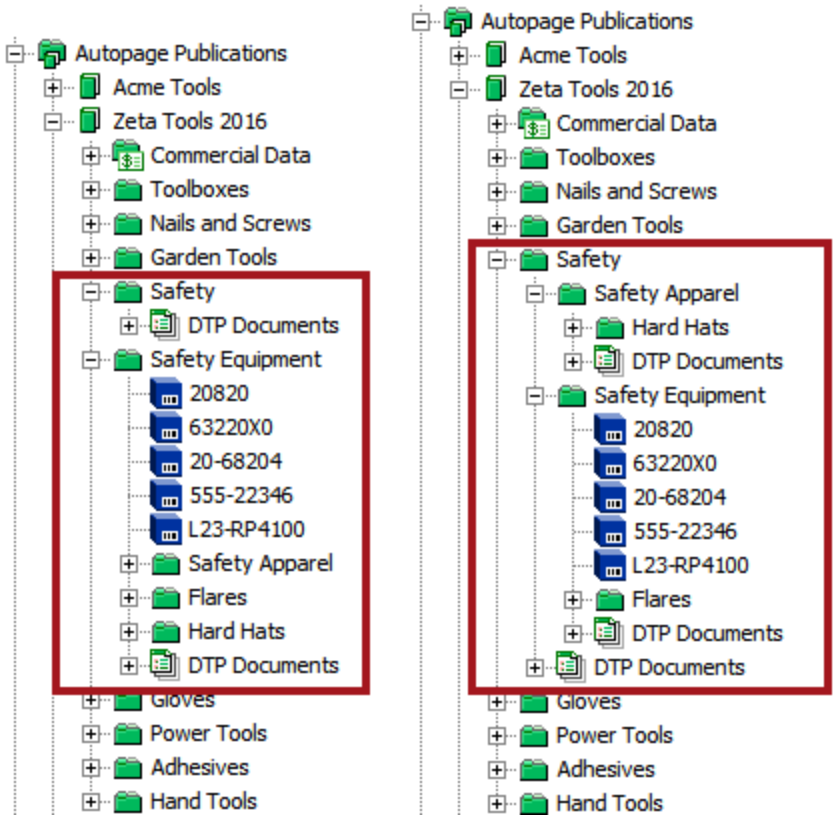
- Publication Group (typically, the object type with the STEP ID 'Publication group root')
- Publication (typically, the object type with the STEP ID 'Default publication type')
- Section (typically, the object type with the STEP ID 'Section')



Subsections may be dragged and dropped out of their parent sections and promoted to higher-level subsections or top-level sections. Likewise, sections may be dragged and dropped into other sections, enabling the 'demotion' of sections to subsections.

This functionality simplifies the maintenance of more complex publications where multiple levels of organization are needed.

The following screenshots shows a 'before' and 'after' example of sections and subsections rearranged in the Tree through drag and drop. The 'before' image (left screenshot below) shows two top-level sections ('Safety' and 'Safety Equipment') with three subsections below the 'Safety Equipment' section. The 'after' image (right screenshot below) shows an updated order, with 'Safety' as the parent section and multiple levels of subsections beneath.



Note: Sections may still be rearranged by drag and drop in the Tree if **Manually Sorted** is set to **No** on publication group, publication, and section objects, but the sections will automatically arrange themselves in alphabetical order.

Templates (publication, product, and page) may also be manually sorted in the Tree if **Manually Sorted** is set to **Yes** on the publication group object type. See the **Sorting Templates in STEP** section of the **STEP Publisher** documentation for more information.

For more information about object type sorting in STEP, see the **Manually Sorted** section of the **System Setup / Super User Guide** documentation.

Duplicating a Publication

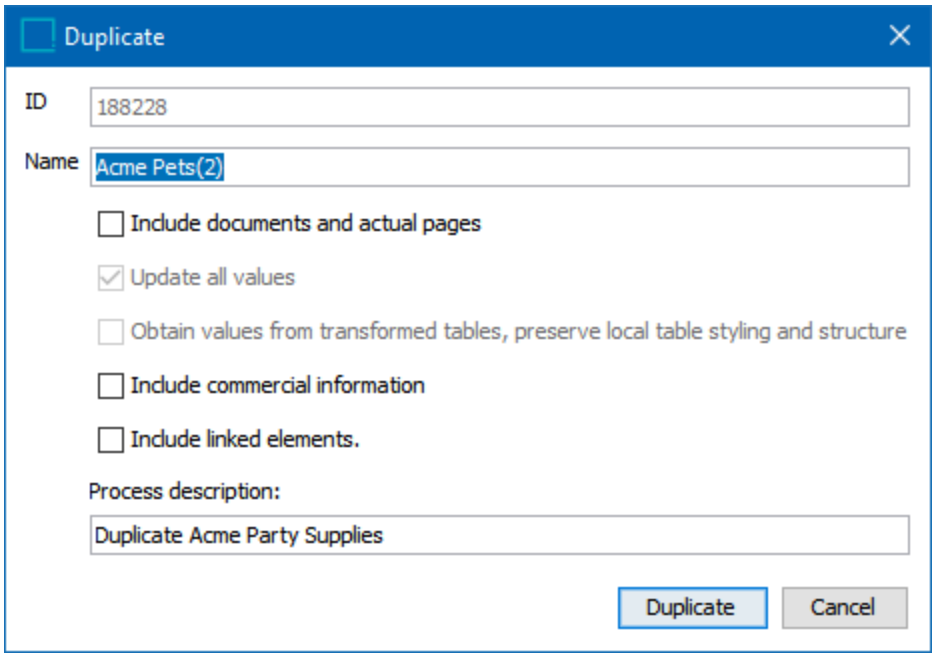
To simplify the creation of new publications that are similar to existing ones, duplicating a publication is a useful feature that can help reduce time spent on manual tasks such as:

- Remapping of import configurations for commercial data
- Reconfiguration of layer mappings
- Resaving of mounted (actual) pages into STEP

A common use case for needing to duplicate a publication is when a catalog is very similar from year to year. When it is time to produce the latest catalog, the publication from the previous year can be duplicated.

Steps to Duplicate a Publication

1. In the Tree, open the top-level node of the publication hierarchy, then navigate to the publication that you would like to duplicate.
2. Right-click and select **Duplicate**. A 'Duplicate' dialog box appears.



3. In the **ID** field, type the ID of the publication (if not generated automatically).
4. In the **Name** field, type a name for the publication.
5. To keep all mounted (actual) pages from the original publication, select **Include documents and actual pages**. (For Flatplanner publications, a duplicated publication will still contain all *planned* pages even if this checkbox is not selected.)

Note: An InDesign server must be connected to your STEP system in order to duplicate actual pages into a new publication. If you select **Include documents and actual pages** and your system is *not* connected to an InDesign server, the publication duplication process will fail. For more information on the deployment of an InDesign server, contact Stibo Systems.

6. The checkbox for **Update all values** is activated if **Include documents and actual pages** is selected. Select **Update all values** if you would like the actual (mounted) pages in the new publication to be updated with all changes made to attribute values in STEP since the time that the original pages were mounted.

   Note: 'Update all values' will update *all* attributes from the original publication. There is no way to choose a subset of attribute values to update when duplicating a publication.

7. The checkbox for **Obtain values from transformed tables, preserve local table styling and structure** is activated if **Update all values** is selected. Select **Obtain values from transformed tables, preserve local table styling and structure** if the following statements apply:

   - Mounted tables exist on the actual pages of the original publication
   - Attribute values within these tables have changed in STEP since the original publication was created
   - You would like to update the values contained in the table cells but do *not* want to completely remount the tables

   Updated table cell values will be populated as they exist in the resolved table in STEP, i.e., the way the table appears in STEP after all transformations have been applied.

   Note: Any *new* transformations applied to tables since the original publication was created will not be applied to the updated tables in the new publication.

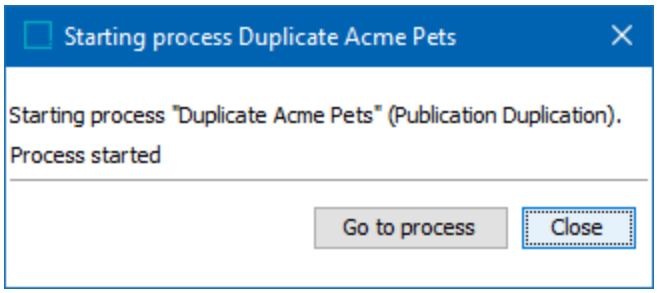
   If **Obtain values from transformed tables, preserve local table styling and structure** is *not* selected, all tables will be remounted in the new publication. Remounting a table will update the tables with any changes made in STEP but will also cause the loss of any manual table formatting that was applied to the tables in the original publication. Manual formatting includes changes such as the adjustment of column widths or addition of background shading to cells.

   If the actual structure of a table itself has changed in STEP since the table was mounted in the original publication, the table will be remounted in the new publication regardless of whether **Obtain values from transformed tables, preserve local table styling and structure** is checked or not. A basic example of a structural change to a table is the addition or removal of a row or column.

   Note: A configuration property can be set to allow values to update in tables—without remounting—even if structural changes are present. See the **Preventing the Remount of Structurally Different Tables in Duplicated Publications** section later in this topic for more information.

8. Select **Include commercial information** to duplicate the commercial lists and commercial data import configuration(s) into the new publication.

9. Select **Include linked elements** to carry over the product and asset objects that are linked to the sections in the original publication.
10. In the **Process description** field, you may enter a name for the background process that will run when starting the duplication, though a name is not required.
11. Click **Duplicate**. A Publication Duplication background process starts and a **Starting process** dialog box appears.

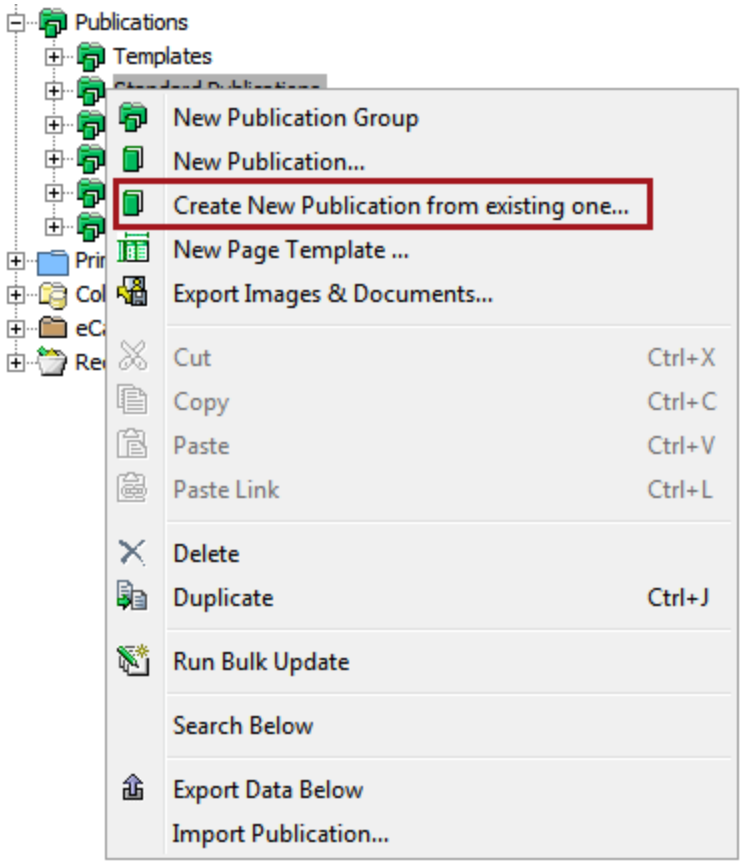


12. Click **Go to process** to monitor the background process or click **Close** to exit the dialog (the background process will still run).
13. Once the background process has finished the new publication can be found in the Tree.

Create a New Publication from Existing

Another method of duplicating a publication in STEP is to create a new publication from an existing publication. This method is ideal if you do not want to locate the existing publication, duplicate it, then cut and paste or drag and drop the duplicated publication from the 'old' location to the 'new' location.

1. Locate the publication group where you would like to create the new publication.
2. Right-click and select **Create New Publication from existing one...**.



3. Browse to or search for the publication that you would like to duplicate. Click **Select**.
4. The same **Duplicate** dialog box as described in step 2 of the 'Steps to Duplicate a Publication' section of this topic (above) displays.
5. Follow steps 3 - 11 as outlined in that section to create your new publication.

Preventing the Remount of Structurally Different Tables in Duplicated Publications

To prevent tables with structural differences from remounting in a duplicated publication, a config property may be added to the sharedconfig.properties file on the STEP application server. This property is **InDesign.TableMissMatch**.

```
#Other
InDesign.TableMissMatch = 1
```

- If **Obtain values from transformed tables, preserve local table styling and structure** is selected during the publication duplication process and **InDesign.TableMissMatch** is set to = 1, then tables with structural differences will *not* remount in the duplicated publication. Attribute values in the table will update but the table structure will not change. Manual formatting from the original publication will also remain.

- If **Obtain values from transformed tables, preserve local table styling and structure** is selected and **InDesign.TableMissMatch** is set to = 2, tables with structural differences will remount and manual formatting will be lost.
- If **Obtain values from transformed tables, preserve local table styling and structure** is selected and **InDesign.TableMissMatch** is set to = 3 (or any other value), tables with structural differences will be skipped. Values will not be updated, nor will tables be remounted.

Considerations and Limitations

If the possibility exists that a large number of attribute values have been changed in STEP since the time that the original publication was completed, it is not recommended to update all values during publication duplication by selecting the **Update all values** checkbox. It is recommended instead to duplicate the publication with the original values intact, then update the values on the duplicated pages afterward from within InDesign.

The reasons for this recommendation are:

- Updating attribute values by clicking **Update all values** is an 'all or nothing' scenario. The data update options under the STEP menu in InDesign—including **Update Document Data** and **Check DB Update**—allow greater flexibility in what should be updated, including the ability to update values from specific attribute groups only.
- Updating data in InDesign also allows for values to be updated in text but not in tables. Updating values in tables all at once during publication duplication can provide unpredictable results if there have been structural changes made to the tables since the creation of the original publication.

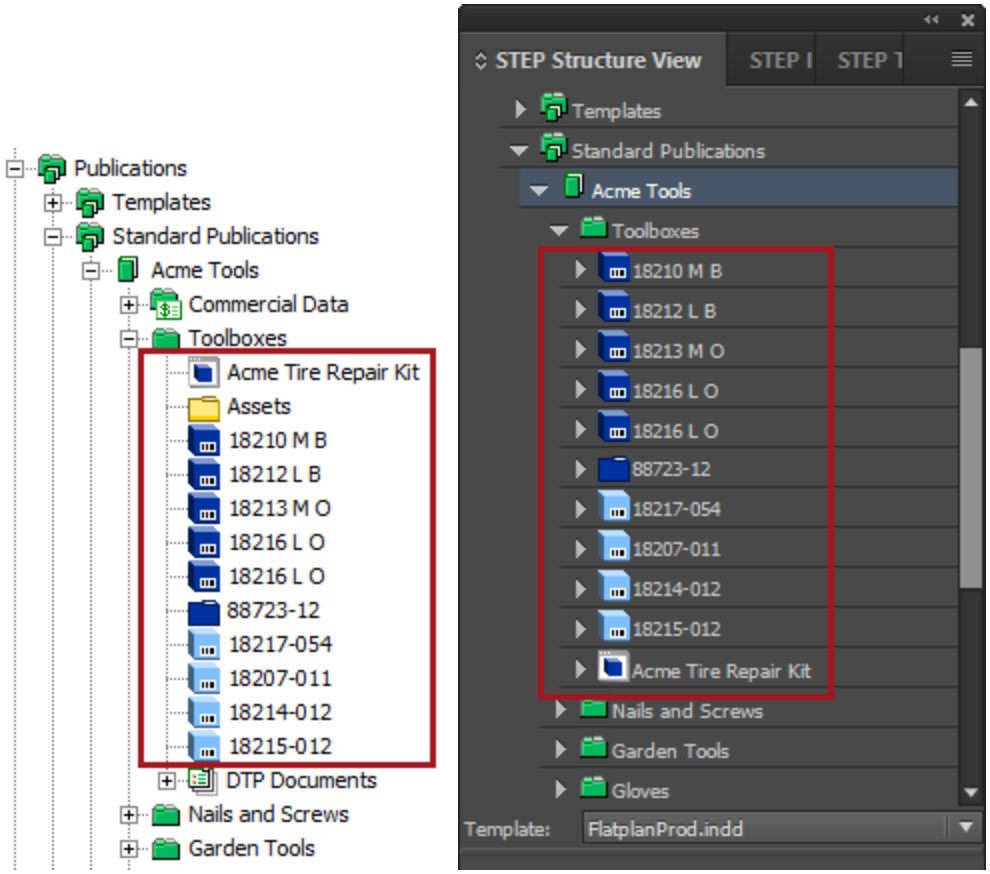
Linking Objects in the Publication Hierarchy

Product, asset, entity, and classification objects may be linked to publication **sections** in the publication hierarchy. Product and asset objects (but not entities or classifications) may also be linked to **publications**.

Linking products and assets to a publication at the top level can be a useful way to make a 'collection' of objects available for the entire publication. Linking products, assets, entities, and classifications to publication *sections* is a useful way to further organize these objects for DTP operators. This organization helps to reduce guesswork for DTP operators as they choose objects from the STEP Structure View panel to mount ('drag and drop') onto InDesign pages.

Linking these objects directly to publications and sections also eliminates the need to organize them in an alternate classification hierarchy.

Linked objects can be viewed directly beneath the applicable publication nodes in the **Tree** (left screenshot below) as well as from the **STEP Structure View** panel in InDesign (right screenshot below).



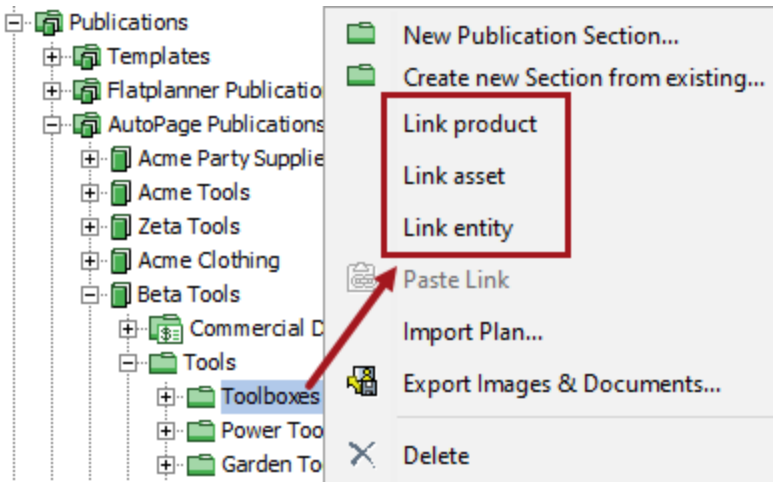
Note: Reference types are not used to link objects into the publication hierarchy. Due to this, any valid object (product, asset, entity, or classification) may be linked into any publication or section. In addition, metadata cannot be placed on links between publications / sections and linked objects.

This topic outlines the manual steps involved in linking and unlinking objects to and from nodes in the publication hierarchy. For information on more automated linking methods, refer to the **Exporting and Importing Publications** section of the **STEP Publisher** documentation.

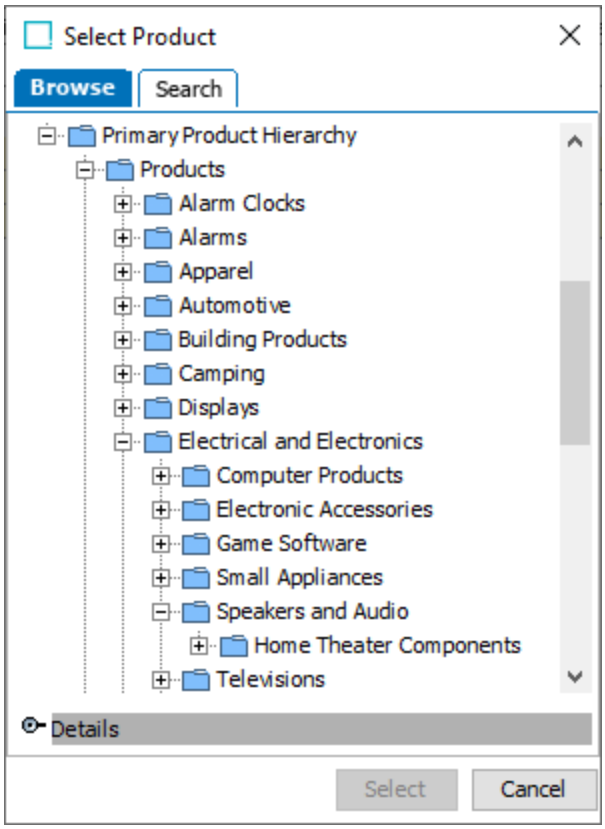
Note: Linking objects to publication sections is mandatory for AutoPage publications, which can also use the AutoPage Publication Planner to link objects. For more information, see the **AutoPage Publication Planner** topic in the **AutoPage** documentation.

Steps to Link a Product, Entity, or Asset to a Publication or Section

1. In the **Tree**, navigate to the publication or section object to which you would like to link your product, entity, or asset objects.
2. Click on the desired publication or section, then right-click and select the relevant option (**Link product, Link asset**, or **Link entity**).



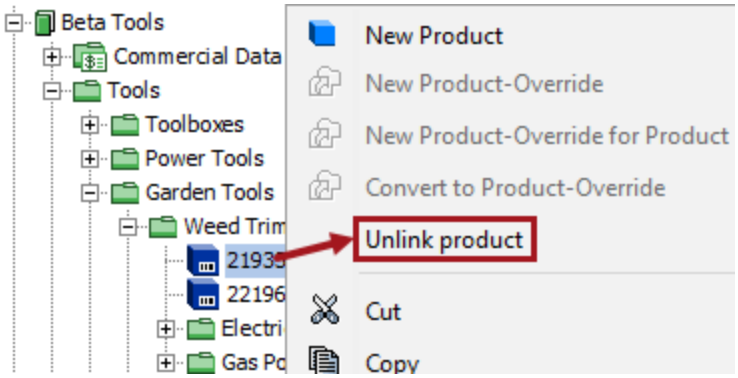
3. In the 'Select' dialog that displays, browse to or search for the product, asset, or entity object(s) that you would like to link to the publication or section. Multiple objects may be selected by holding the CTRL or Shift key while making selections. The below screenshot shows the **Select Product** dialog.



4. Click **Select** to link the selected object(s) to the publication or section.

Unlink a Product, Entity, or Asset from a Publication or Section

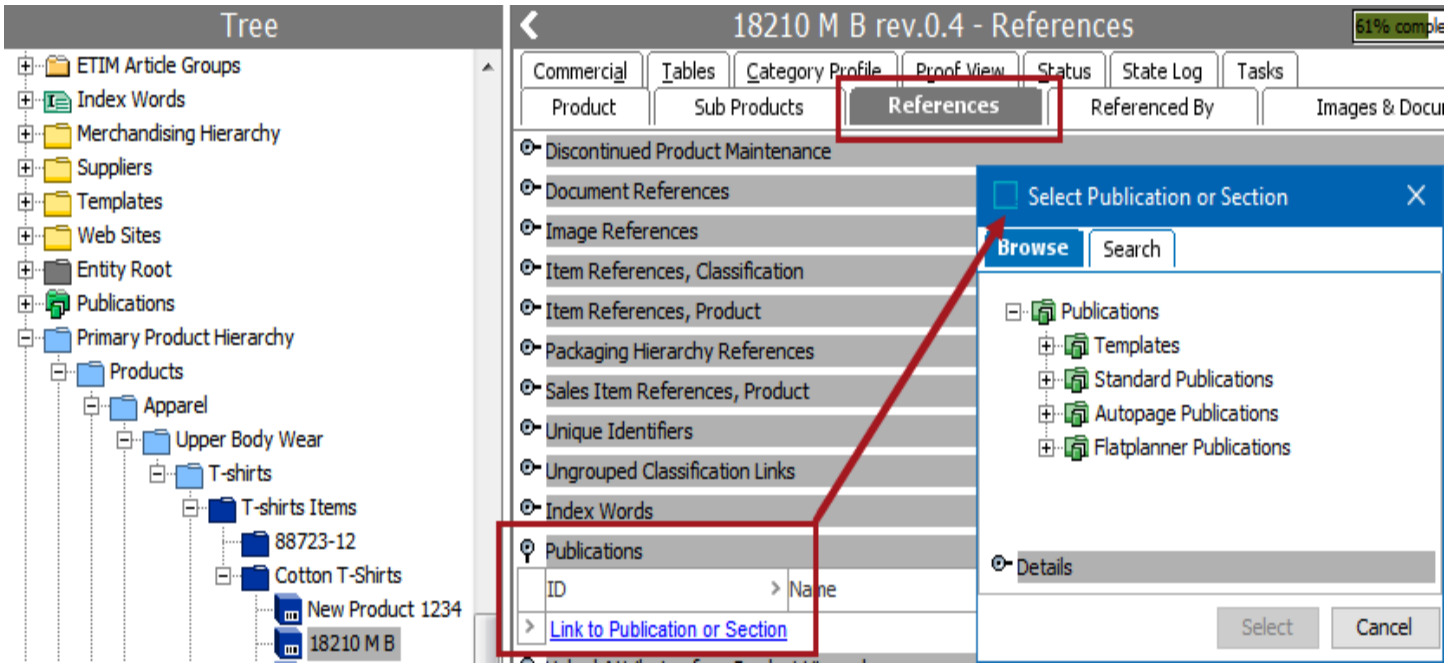
1. In the publication hierarchy, navigate to the product, entity, or asset that you would like to unlink from the publication or section.
2. Right-click the desired object and select the relevant **Unlink** option. The below screenshot shows a product selected, with the **Unlink product** option.



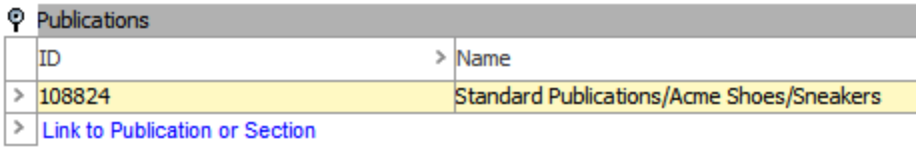
Link a Product or Entity to a Publication or Section from the References Tab

Products and entities may also be linked to publications and sections from the **References** tab. (This option is not available for assets or classifications.) Products can be linked to both publications and sections. Entities can only be linked to sections.

1. Navigate to the product or entity that you would like to link to the publication or section and click the **References** tab.
2. Expand the **Publications** flipper. For products, click **Link to Publication or Section** (shown below). For entities, click **Link to Section**.

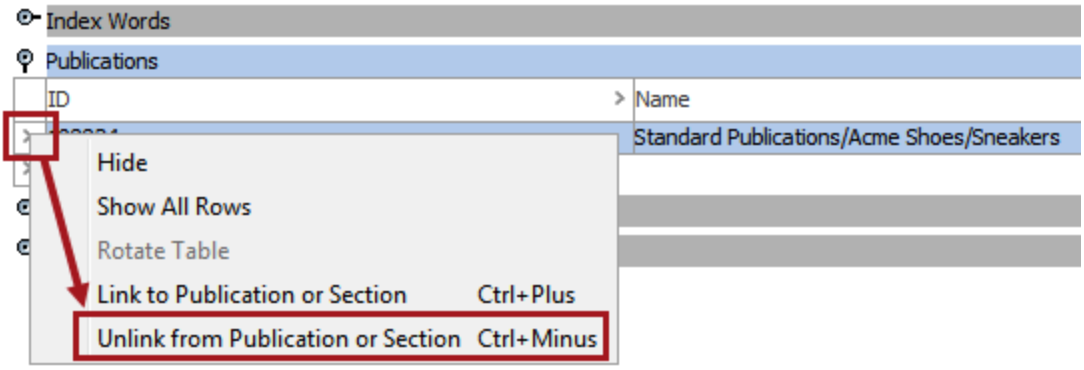


3. For products, the **Select Publication or Section** dialog displays. For entities, the **Select Section** dialog displays. Browse to or search for the publication or section into which you would like to link your object, then click **Select**.
4. The product / entity is now linked to the selected publication / section.



Unlink a Product or Entity from a Publication or Section from the References Tab

1. Navigate to the **References** tab of the product or entity that you would like to unlink from the publication or section.
2. Expand the **Publications** flipper and click the arrow to the left of the row that contains the publication / section from which you would like to unlink.
3. Select **Unlink from Publication or Section**. For entities, click **Unlink from Section**.



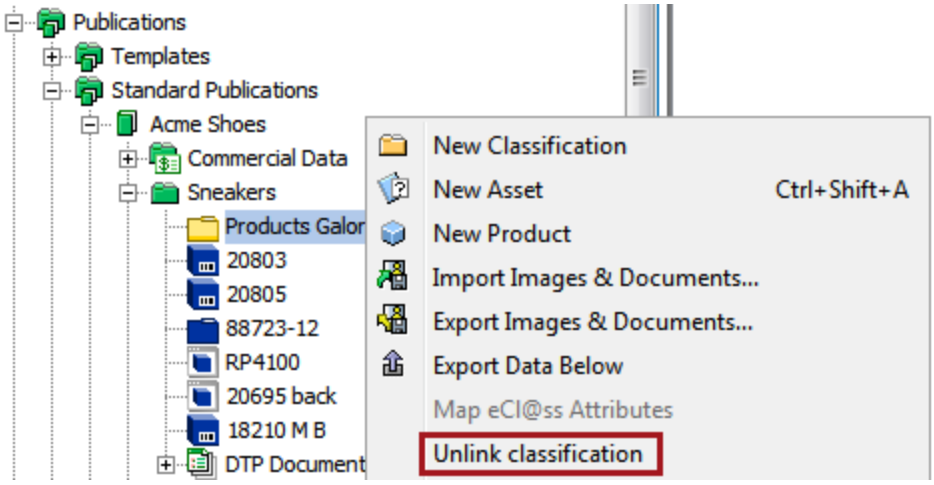
Link a Classification to a Publication Section

To link a **classification** folder to a publication section, drag and drop the classification folder from its location in the Tree into the relevant section folder.

Note: There is no right-click option available on sections for linking classifications. Also note that classifications cannot be linked to publications at the publication level.

Unlink a Classification from a Publication Section

1. In the publication hierarchy, navigate to the section that contains the classification you would like to unlink.
2. Click the relevant classification, then right-click and select **Unlink classification**.



Publisher

This documentation section / user guide provides general information about the Publisher component (also referred to as STEP'n'design) and how it is used in connection with Adobe InDesign, the STEP Workbench, Flatplanner, and AutoPage.

Note: Supported versions of Adobe InDesign are CC 2022 (CC17), CC 2021 (CC16), CC 2020 (CC15), and CC 2019 (CC14).

Businesses producing printed collateral—including catalogs, brochures, and sales flyers—face a rapidly changing set of challenges in producing frequent publications, often for multiple brands. In addition, complexity has increased with the requirement for marketing in multiple languages, price versions, and to specific customer segments. The final challenge—creativity in page design, even for the most unadventurous product ranges—is a must if a promotion is to catch the attention of the customer.

Using STEP Publisher allows you to connect to the STEP database and work with InDesign documents as dynamic documents, greatly simplifying (and even fully or partially automating) the production of printed collateral. The benefits of using STEP Publisher include:

- Use of pre-built InDesign page layout templates that can be used repeatedly ('create once, use many')
- Instant availability (via STEP) of text, tables, and images for placement ('mounting') on pages
- Ability for creative users to access content in STEP without having to log in to the workbench (all tasks can be performed from within InDesign, including picking up pages as workflow tasks)
- One-click capabilities to update previously mounted pages with the latest content updates from STEP (for example, updates to prices, product availability, and marketing text)
- Ability to write data from mounted pages back to STEP
- Ability to save InDesign documents to STEP, not only making the documents available to users in multiple geographical locations, but bringing information about product placement and space usage into STEP that can later be used for data export and reporting purposes
- Ability to dynamically create indexes and tables of contents
- Integration with publishing workflows, easing communication between departments in production environments (*only available with the Flatplanner and Workflow component*s)

Prerequisites

This documentation assumes that users have a basic understanding of STEP and a working knowledge of InDesign. Instructions on how to use InDesign itself are outside the scope of this documentation, except where required to explain how InDesign's standard functionality interacts with the STEP'n'design plugin.

Topics covered in this documentation include:

- Publisher template creation
- Mounting (paginating) pages

- Saving documents to STEP
- Proof View
- Index generation

Though the **Flatplanner** and **AutoPage** publishing components are mentioned in various places throughout this documentation / user guide, full details of these components are covered in their own sections:

- **Flatplanner** user guide
- **AutoPage** user guide

Mounting (Paginating)

STEP Publisher provides creative users with a view of text, tables, and images within STEP. Mounting of product data can be done by dragging and dropping objects from the STEP Structure View panel onto the InDesign page. More information on this panel is available in the **STEP Structure View** topic.

Templates

To reduce the time needed to build pages, ensure style consistency, and improve accuracy, STEP Publisher enables you to create templates to roughly plan the page layout before mounting.

For more information, see the **Templates in STEP Publisher** topic.

Saving Documents to STEP

Another feature in STEP Publisher is the ability to save InDesign documents back to STEP. Both templates and finalized documents can be saved to STEP. The advantages of saving documents back to STEP include:

- They become visible in STEP
- It is possible to see which pages a product is used on and how much space it uses on the mounted page
- It is possible to reuse product layouts
- It is possible to create indexes

For more information, see the following topics:

- Storing and Editing Product Templates
- Storing and Editing Publication Templates
- Saving Finalized InDesign Documents to STEP

Updating Documents and Writing Back Data to STEP

A key feature in STEP Publisher is the ability to update previously created page(s) with the latest content changes from STEP. This functionality allows the page-building process to begin even when product data is not yet complete or approved. The update features within STEP Publisher ensure that the contents of your pages always match the corresponding content in STEP.

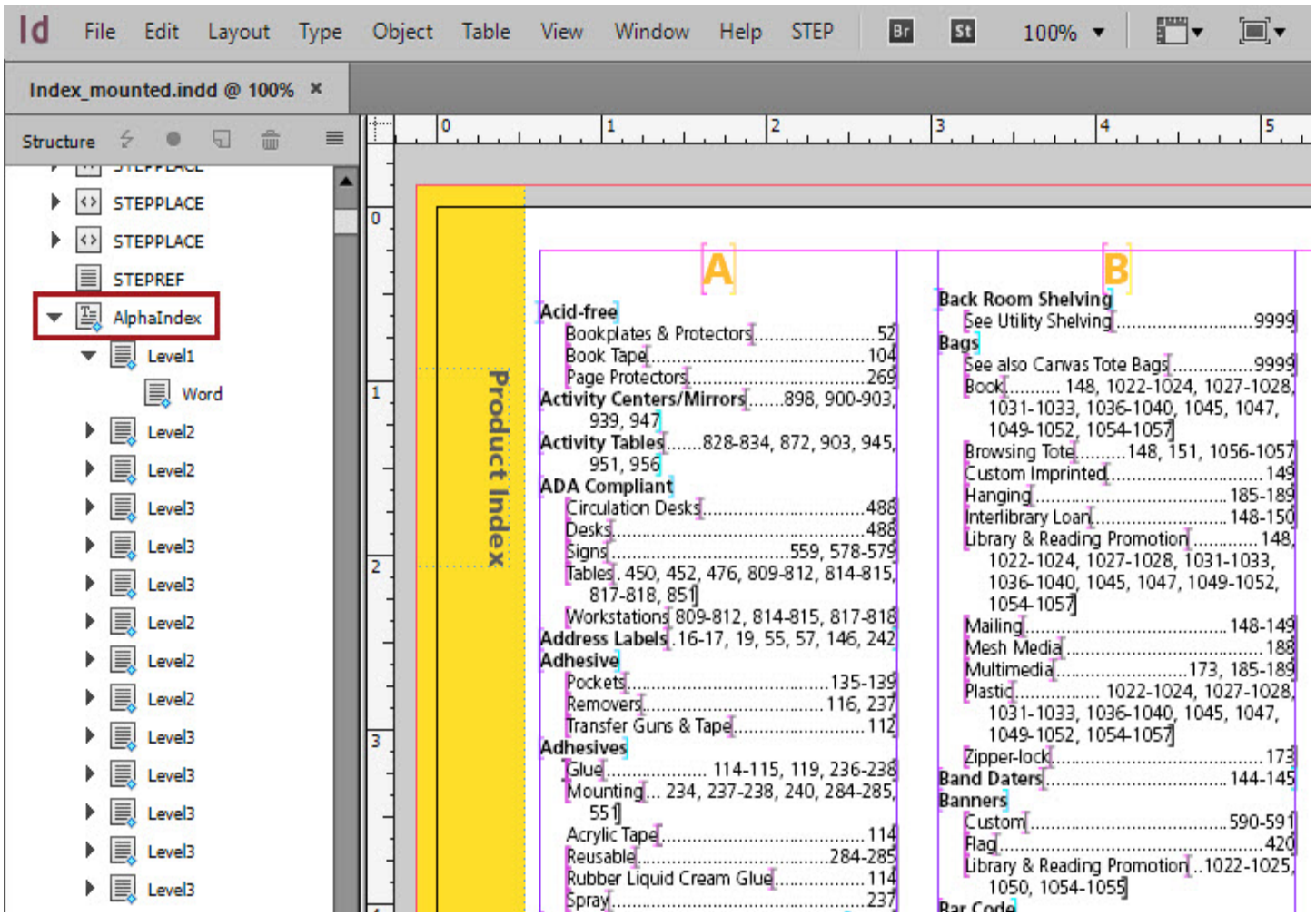
You can also work the other way around and update the STEP database with the latest changes from content on your mounted pages.

For more information about updating documents and writing information back to STEP, see the following topics:

- Updating Documents From InDesign
- Updating Documents From the Workbench
- Writing Data Back to STEP

Creating Indexes

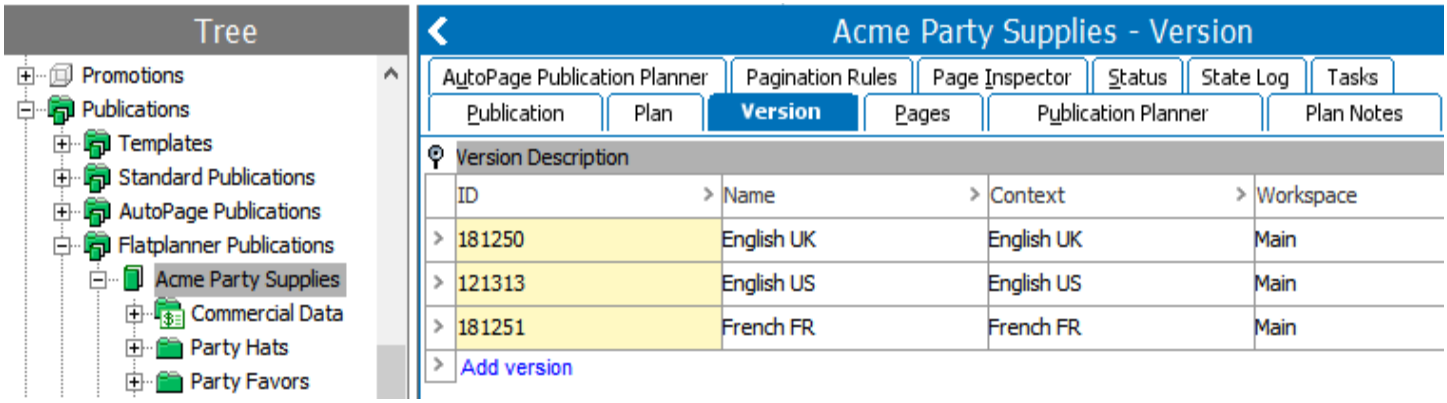
Because STEP'n'design enables documents to be saved back to STEP with page numbers, publication indexes can be created by using the STEP Export Manager to export the index words in an XML file. The file can then be imported into InDesign to create an index, as pictured in the below screenshot. For more information, see the **Creating Document Indexes** topic.



Publications and Versions

Because STEP can store multiple 'views' of the same data in different contexts and workspaces, STEP Publisher allows for these different contexts to be represented in publications by **versions**. Versions are modeled around specific language and country views of data. Versions can also be created to support currency

zones, vertical markets, or types of catalog. Individual publication versions are typically mounted on separate layers within the STEP Publisher document (publication template, or mounting page).



The advantages of using different versions and layers include:

- Viewing proof views of individual layers
- Saving money on printing costs by using 'fifth black' plate change (placing all black textual content on different layers with all images on a single layer)

For more information about creating versions, see the **Publication Versions** topic in the **Publication Hierarchy** section of the **STEP Publisher (Adobe InDesign Integration)** documentation. For more information about working with versions, see the **Working With Version Layers** section of the STEP Publisher documentation.

Publishing (Flatplanner) Workflows

Publishing workflows—known as **Flatplanner workflows**—can be implemented on systems that utilize both the Flatplanner and STEP Workflow components. Flatplanner workflows enable creative staff to pick up workflow tasks—in the form of Flatplanner planned pages—from within InDesign. Flatplanner workflows link together all of the tasks involved in the process of planning and approving the pages that comprise Flatplanner publications. In addition, these workflows greatly ease and streamline communication between different departments in production environments.

For more information about Flatplanner workflows, see the **Flatplanner Workflows** section of the **Flatplanner** documentation.

Installing Publisher

This section contains information about installing the Publisher / STEP'n'design plugin on your local computer and logging on to STEP from within InDesign. This topic assumes the following:

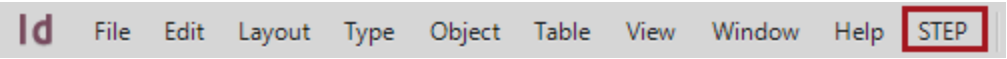
- You have Adobe InDesign installed on your computer
- You have been assigned a STEP user name and password
- A publication containing at least one publication version has already been created in your STEP system. A publication version is required to define the workspace and context in which you will be working. For more information about creating a publication version, see the **Publication Versions** topic in the **Publication Hierarchy** section of this guide.

Installing the STEP'n'design Plugin

To log onto STEP from within InDesign, you must first install the STEP'n'design plugin that is associated with the STEP system that you are trying to access.

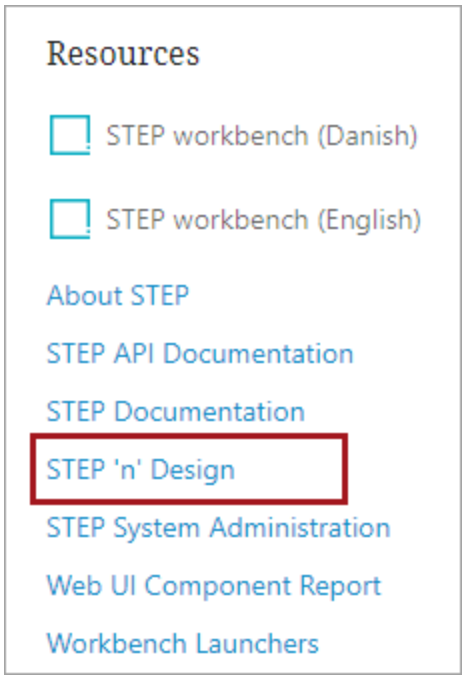
Note: It is strongly recommended that InDesign is closed while you install the plugin. If InDesign is open when you install the plugin, you will need to close and reopen InDesign before the plugin can be registered.

Once the STEP'n'design plugin is successfully installed, you will see a STEP menu option across the top of the InDesign interface. If you do not see this option, then the plugin installation was unsuccessful.

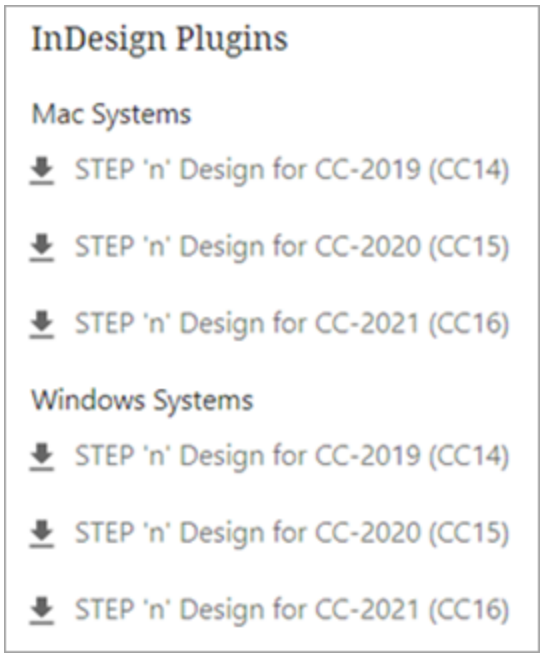


The following instructions are written for the Windows platform, but the overall process of downloading and installing the plugin is equivalent for Mac users.

1. In your browser, navigate to the Start Page for your STEP system and locate the STEP 'n' Design link under Resources.



2. Click on the link to display the supported plugins for your STEP system. The selection of plugins may be different depending on the release version and/or patch level of your system.



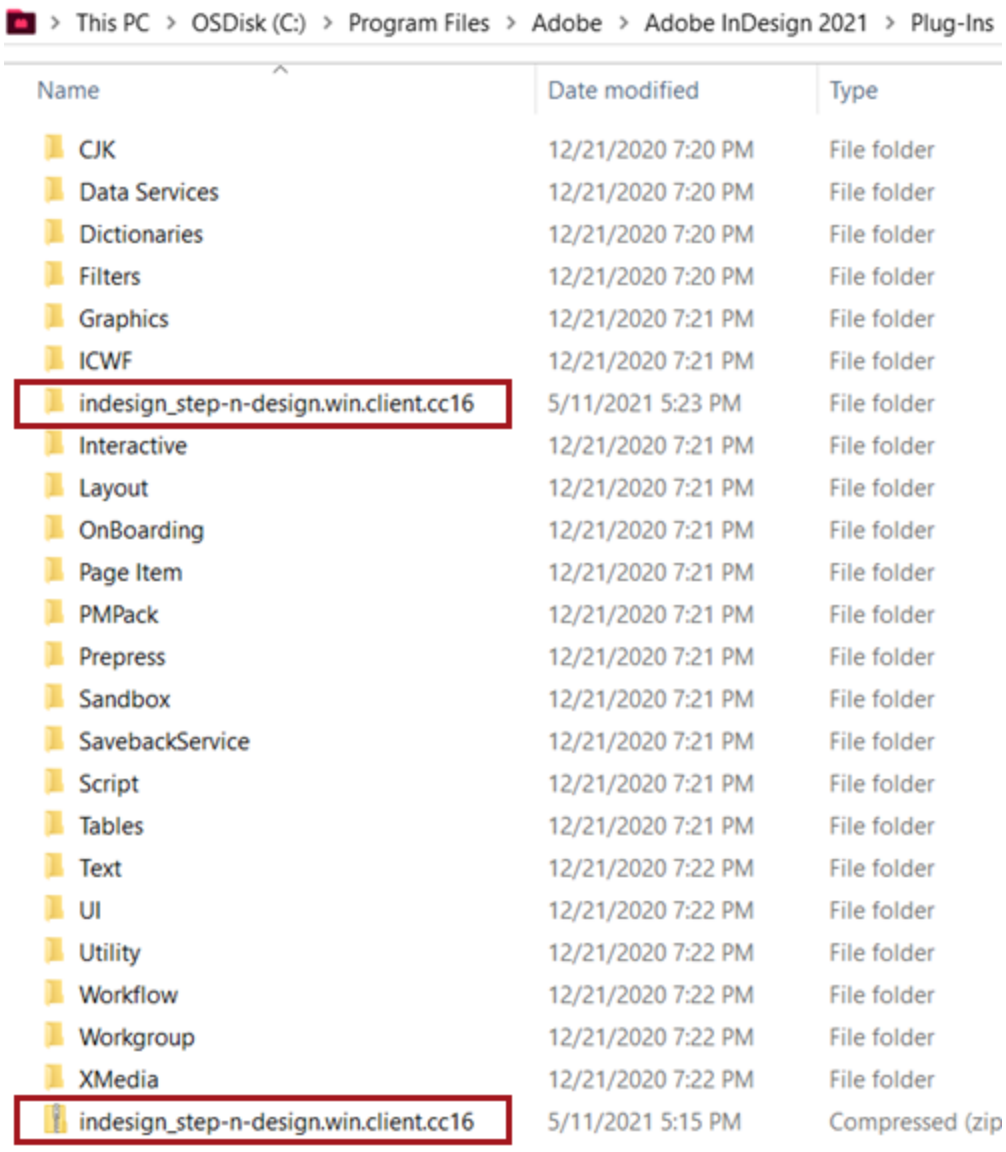
3. Select the plugin that matches the version and platform of InDesign that you are running. For Windows users, the plugin is contained within a .ZIP file. For Mac users, the plugin is contained within a .dmg file. The file should download automatically, though the file may download differently depending on your browser settings.

The following screenshot shows how the downloaded .ZIP file appears at the bottom of a browser window in Chrome.

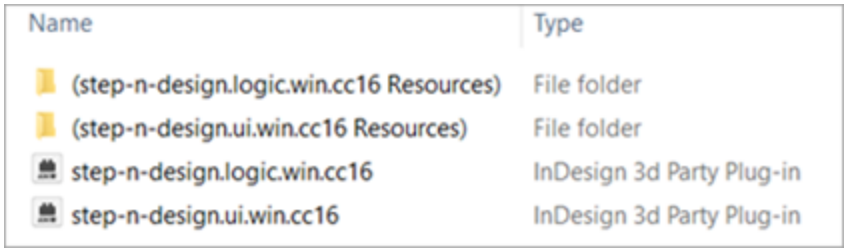
4. Locate the .ZIP file in its download location (such as your Downloads folder or other default download location), then move it into your Adobe InDesign **Plug-Ins** folder. For Windows platforms, the file path format is as follows. ('Adobe InDesign CC 2021' will be replaced with the specific version of InDesign that you are using.)

   C:\Program Files\Adobe\Adobe InDesign CC 2021**Plug-Ins**

5. Unzip the file directly into the Plug-Ins folder. Optionally, you can create your own folder within the Plug-Ins folder to store the STEP'n'design plugin (for example, 'STEPplugins'), but this is not required.
6. Once unzipped, your Plug-Ins folder should resemble the following. The ZIP file may be deleted at this point, though it is not required to do so.



7. The contents of the unzipped file will look as follows. Nothing should be deleted from this folder once unzipped.



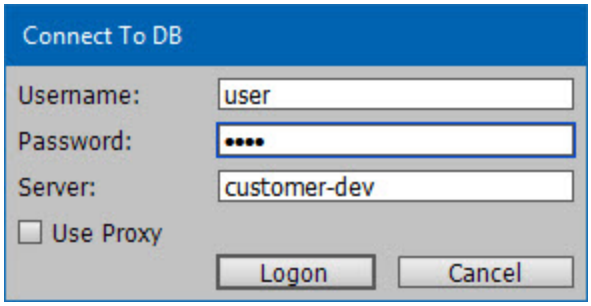
For Mac systems, only the two plugin files will be available; the resources folders will not be present.

8. After installing the plugin in the Plug-Ins folder, open your InDesign client to complete the installation process and log onto STEP.

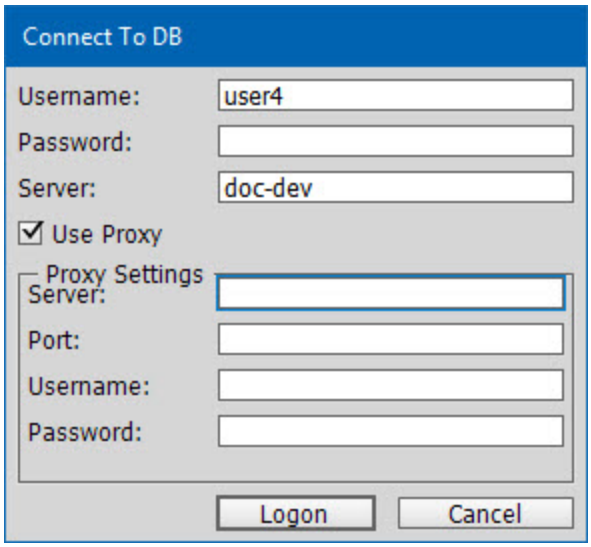
Logging on to STEP from InDesign

After installing the STEP'n'design plugin and opening InDesign, you will have the ability to connect to STEP from InDesign.

1. When InDesign opens, a **Connect to DB** dialog box displays.



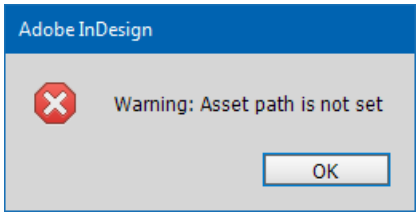
2. In the **Username** field, type your user name.
3. In the **Password** field, type your password.
4. In the **Server** field, type the name of the server (STEP database) you want to connect to.
5. If you need to connect to STEP through a proxy server, check **Use Proxy**. Once the Use Proxy box is checked, the fields that are required to connect to the proxy server are displayed (Server, Port, Username, and Password).



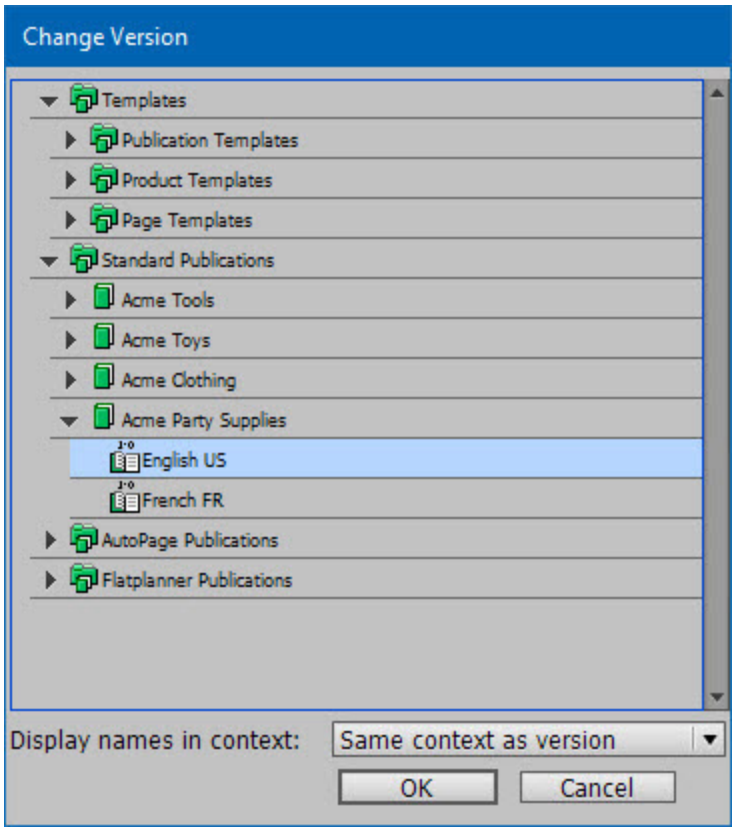
Note: If using http://, by default the system will connect using a port number. If SSL is enabled and you are using https://, then the system will connect using a different port number for the same server. For more information, contact Stibo Systems support staff.

6. Click **Logon**.
7. For first-time logins, a warning dialog displays that says **Warning: Asset path is not set**. The error message will display every time you log in until an asset path is specified in the STEP > **Preferences** menu. Click **OK** to continue.

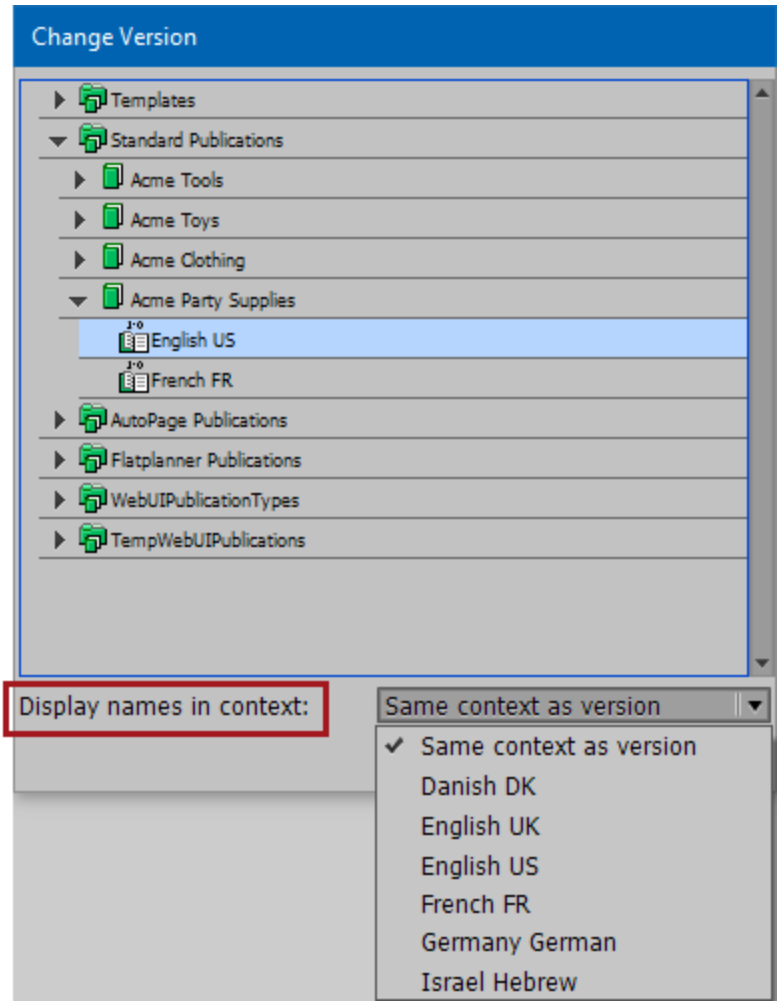
   For information on setting an asset path and disabling this warning, see the **Linking to an Asset Location** topic.



8. After clicking **OK**, the **Change Version** dialog displays. A version must be selected in order to define the workspace and context to be used.



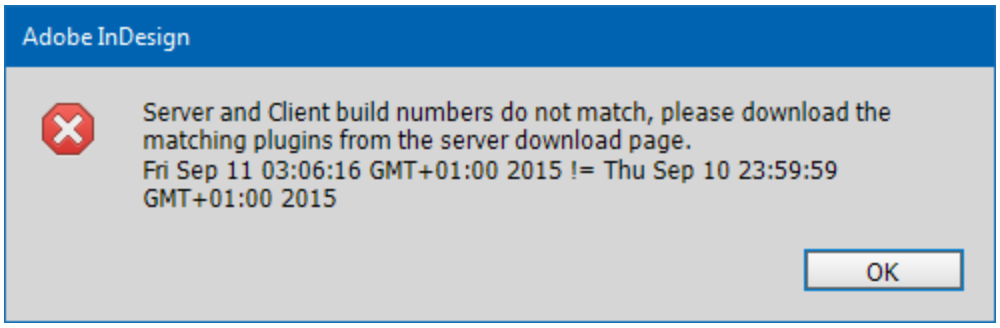
9. Navigate to the relevant publication, then click the black arrow to the left of the publication icon to display the available versions for the publication.
10. Select a version, then click **OK**.
11. To use a different display language than that of your publication version for object names and attribute names in the STEP panels, choose a context from the **Display names in context** option before clicking OK. This option allows you to choose a different display context so you can, for example, view all product and attribute names in English if you are working with a French publication. For more information on this option, see the **Description of the InDesign Interface** topic.



Reinstalling the STEP'n'design Plugin After System Patches and Upgrades

The STEP'n'design plugin must be reinstalled every time your STEP system is upgraded and/or every time a patch is applied to your system that impacts the STEP'n'design component. In these instances, the STEP'n'design plugin in your Plug-Ins folder must be deleted and a brand-new plugin must be downloaded again and installed from the Start Page of your STEP system.

If the build level of your STEP'n'design plugin does not match the build level of your STEP system, you will receive a warning such as the below after you connect to your STEP server from InDesign:



Though you will still be connected to STEP after clicking 'OK,' it is not recommended to work with a mismatched plugin. For example, there might have been bugs in the system that were fixed with a patch. If your InDesign client is running an older build of the plugin that was released before the patch, your system may not function properly.

Alternate Plugin Locations

In some instances, IT standards and procedures for data safety may prohibit users from accessing the 'Program Files' folder which contains the 'Plug-Ins' folder. Due to this, users cannot reinstall the InDesign plugins with each subsequent update of STEP Publisher. To alleviate that issue, a workaround exists in InDesign to allow users to designate an accessible folder location for the plugins. This workaround includes the following:

- Creation of an alternate plugins folder accessible by users
- Creation of a text file containing the file location of this alternate plugins folder, which tells InDesign where to look for the new plugins folder
- Storage of InDesign plugins in this alternate plugins folder

Alternate Plugins Folder Text File

After creating the alternate plugins folder, create a text file named 'PlugInConfig.txt' which contains the file path to the new plugin location. Inside the file, the following information will be included. (The file paths below are example paths.)

Windows-based systems

```
=Path
"C:\InDesign\Plugins"
=MorePluginConfiguration
=Exclude
```

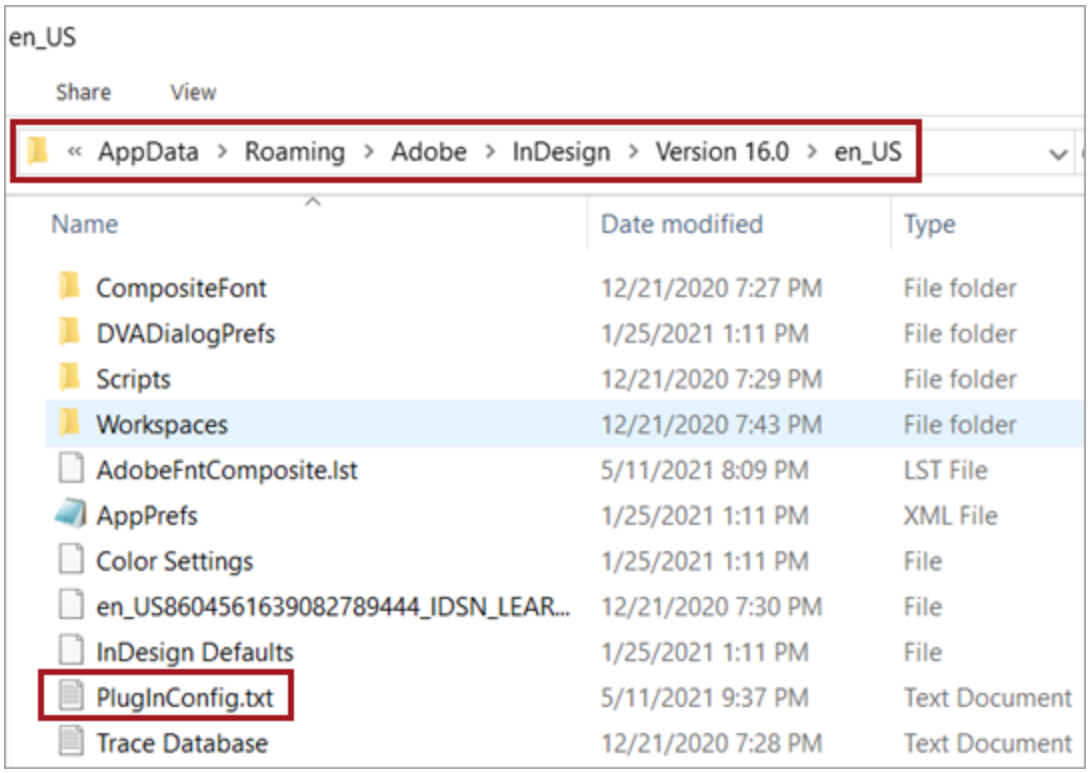
OSX-based systems

```
=Path
"Disk:directory:InDesign\Plugins"
=MorePluginConfiguration
=Exclude
```

Next, based on the related InDesign version, the PlugInConfig.txt will need to be located in one of the following locations.

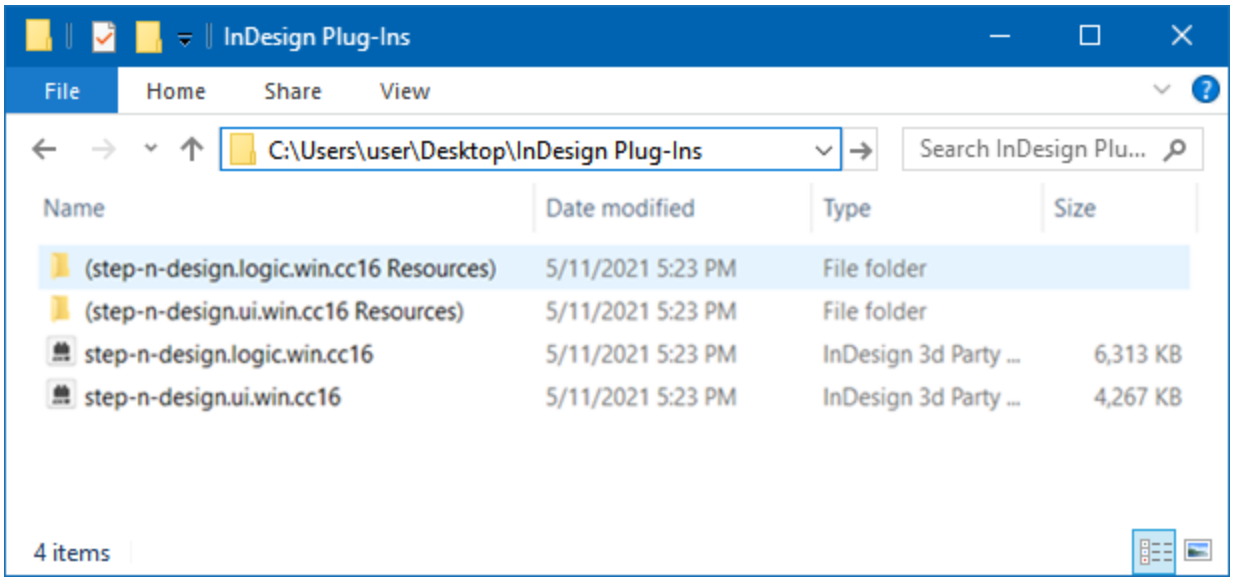
InDesign Version	Windows File Location	OSX File Location
CC 2021	C:\Users\'user'\AppData\Roaming\Adobe\InDesign\Version 16.0\en_US	~/Library/Preferences/Adobe InDesign/16.0/en_US
CC 2020	C:\Users\'user'\AppData\Roaming\Adobe\InDesign\Version 15.0\en_US	~/Library/Preferences/Adobe InDesign/15.0/en_US
CC 2019	C:\Users\'user'\AppData\Roaming\Adobe\InDesign\Version 14.0\en_US	~/Library/Preferences/Adobe InDesign/14.0/en_US

On a Windows machine running CC-2021, the correct location for the PlugInConfig.txt text file is pictured below:



Relocation of Plugins

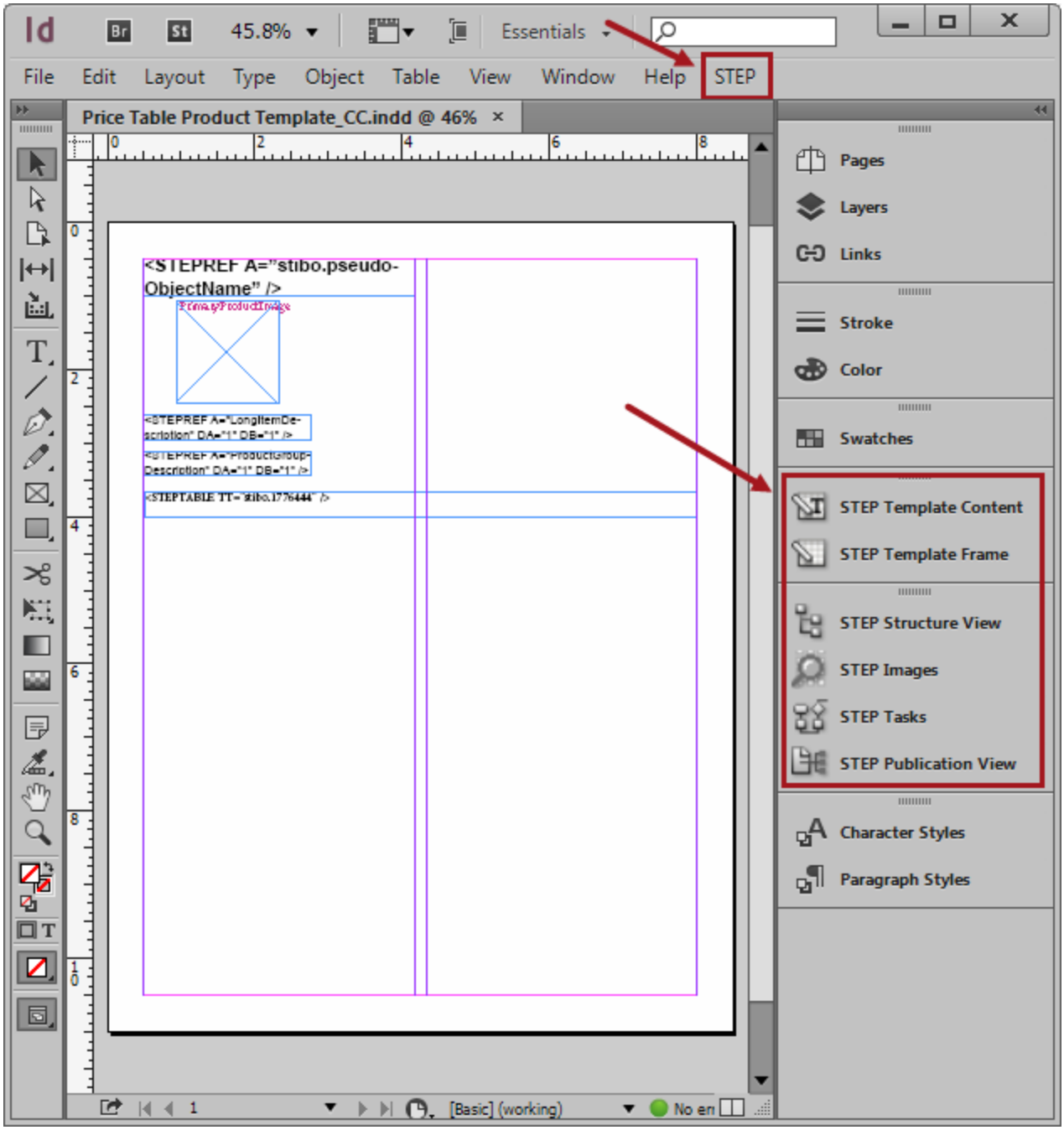
To proceed with this method, relocate the two resource folders and the two plugin files from the 'usual' Plug-Ins folder into the alternate Plug-Ins folder. The below example shows the plugins as stored in a folder named 'InDesign Plug-Ins' on a Windows desktop:



InDesign will load and read the additional plugin location, and no additional configurations are needed. When STEP Publisher is upgraded, users can download and unzip the plugins into this alternate folder and completely bypass the Plug-Ins folder located inside Program Files.

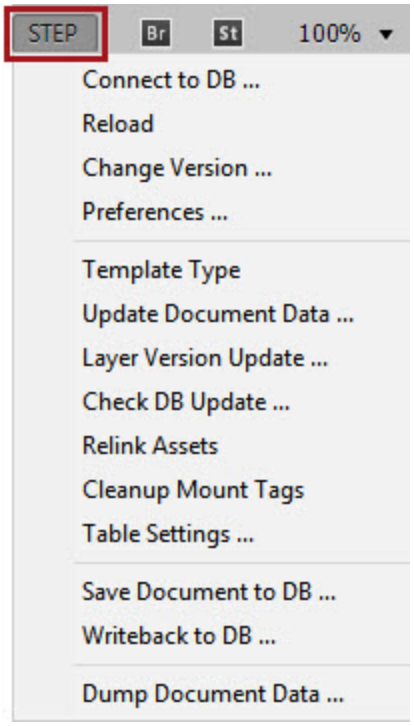
Description of the InDesign Interface

This section contains a description of the InDesign interface, with a focus on the STEP menus and panels that are specific to STEP Publisher. These options are available after you have installed the STEP Publisher / STEP'n'design plugin. (For more information on the plugin, see **Installing STEP Publisher**.)



STEP Menu

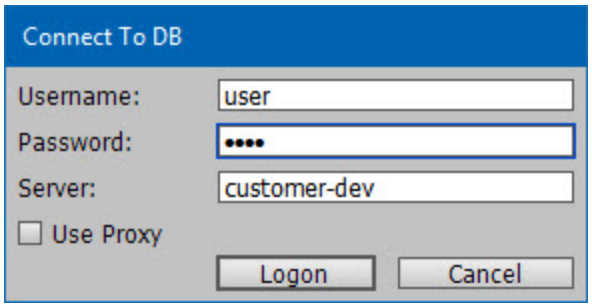
The STEP menu is located in the application bar across the top of the InDesign interface. A number of STEP'n'design functions are available from the STEP menu that allow you to perform a range of operations on the active InDesign page.



Below you will find a brief description of the commands available from the **STEP** menu.

Connect to DB

Use this command to connect your InDesign client to the STEP database. For more information about connecting to STEP, see the **Installing Publisher** topic.

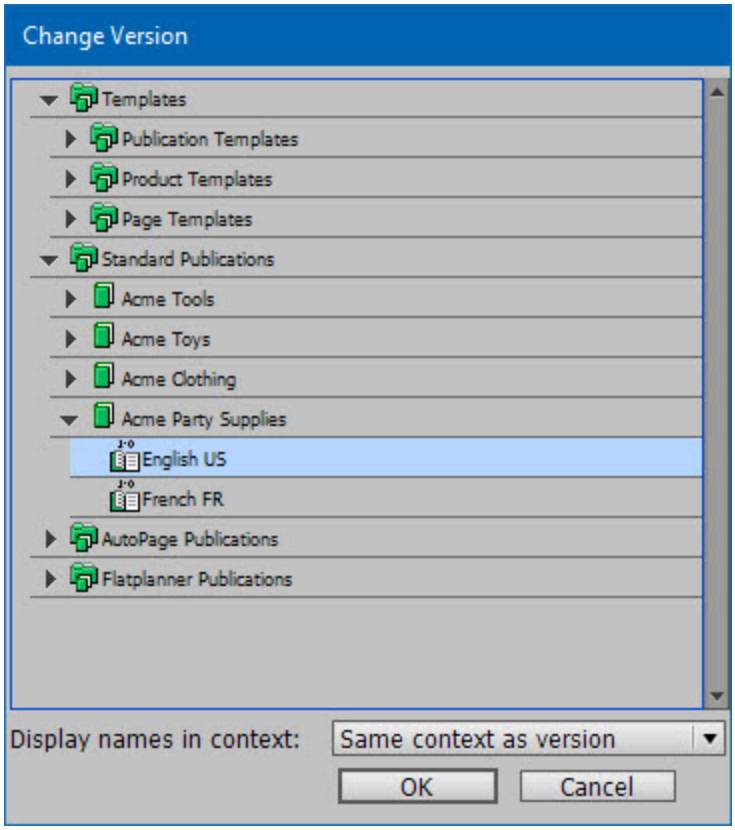


Reload

Use this command to reload STEP data to ensure that the current view in InDesign is up to date.

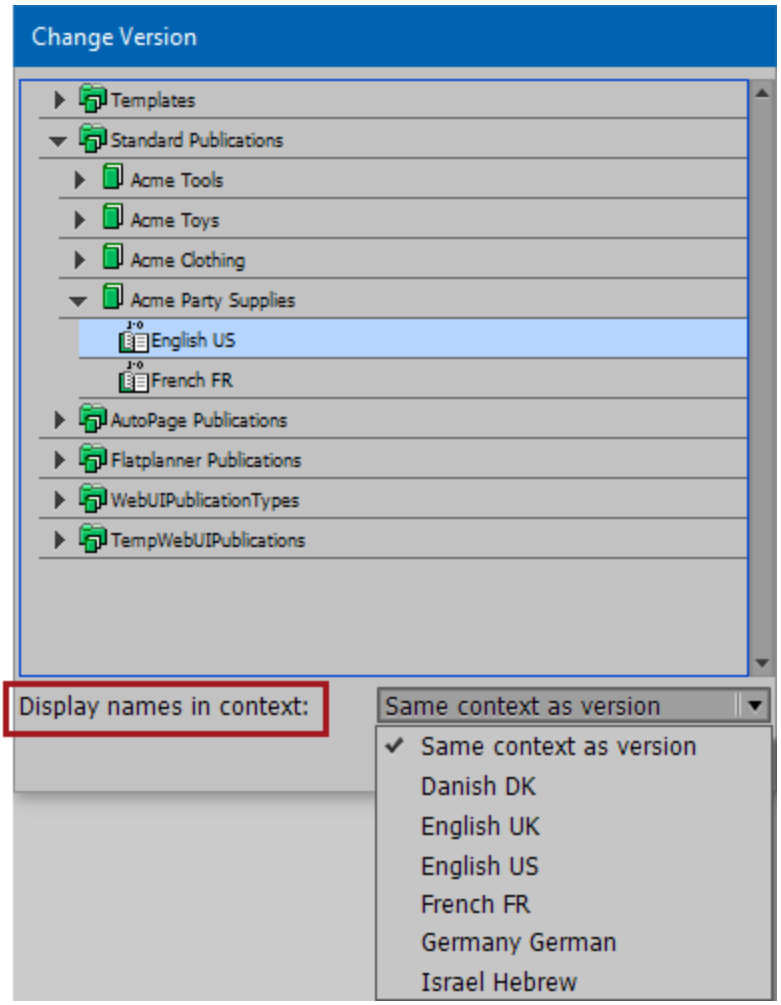
Change Version

Use this command to change the publication version that you are working in and/or the context in which object names are displayed in the STEP panels. A publication version defines the workspace and context from which mounted data is being pulled from STEP. For more information about creating a publication version, see the **Publication Versions** topic in the **Publication Maintenance** documentation.



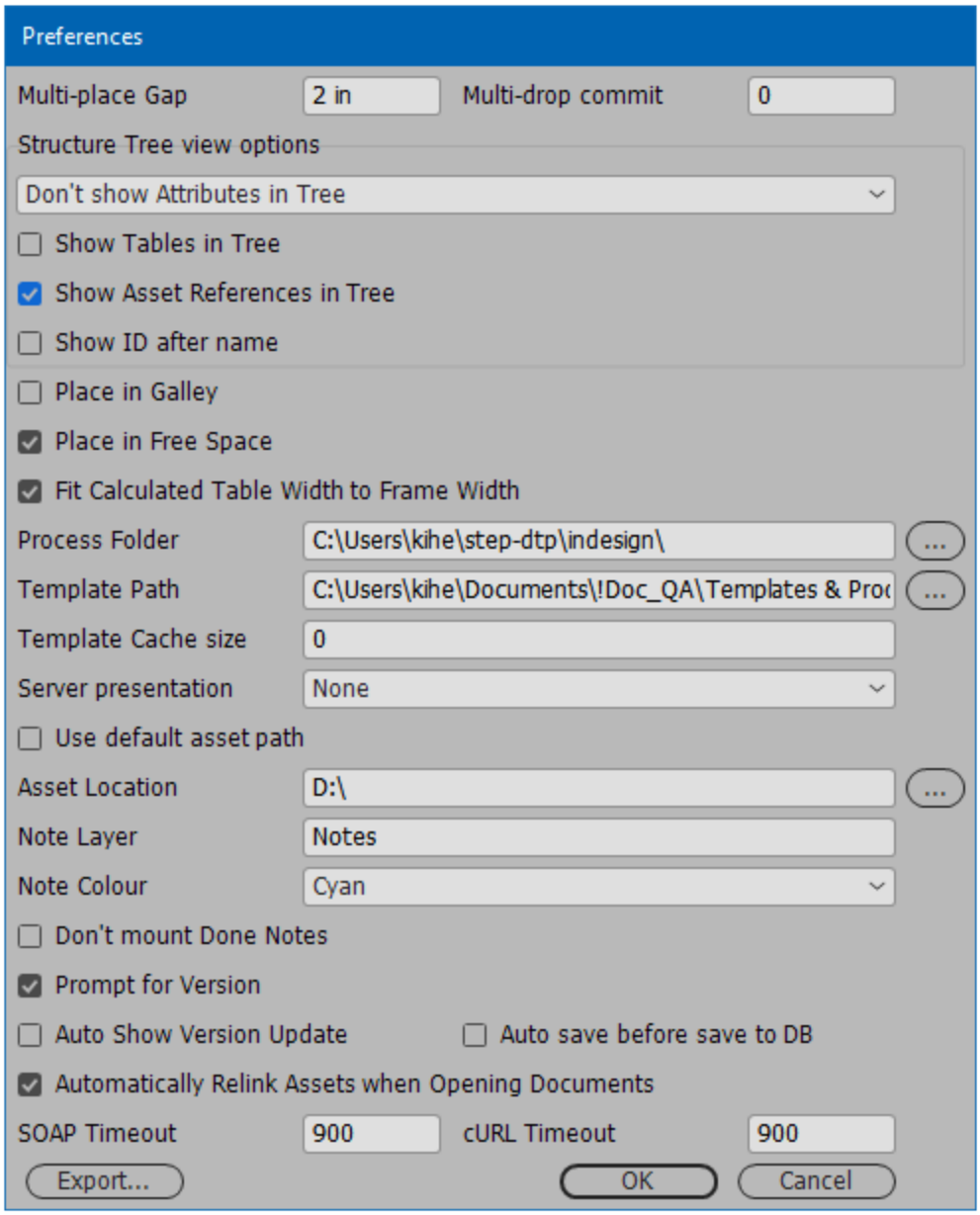
Display names in context

At the bottom of the Change Version dialog is the 'Display names in context:' dropdown menu, which allows you to choose the display language for object names and attribute names in the following STEP panels: STEP Structure View, STEP Template Content, STEP Images, and STEP Publication View. See the **STEP Publisher Multi-Language Support** topic for more information.



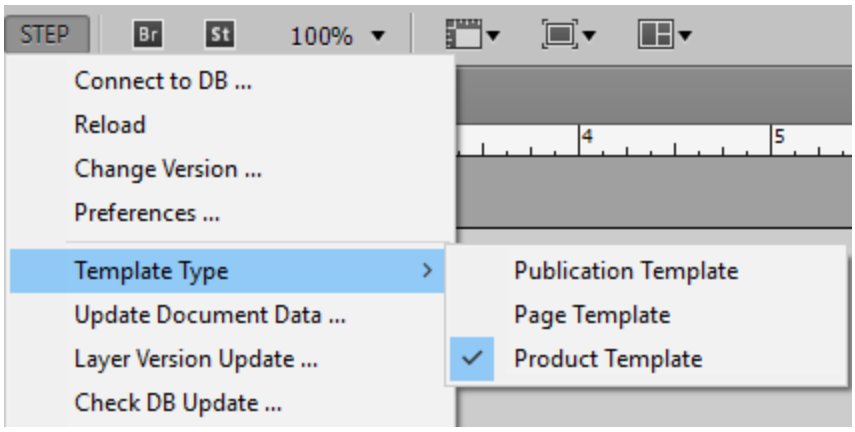
Preferences

Launches the STEP Preferences menu. See **Configuring the STEP Preferences Menu** in the **STEP Publisher** documentation for full details on this menu.



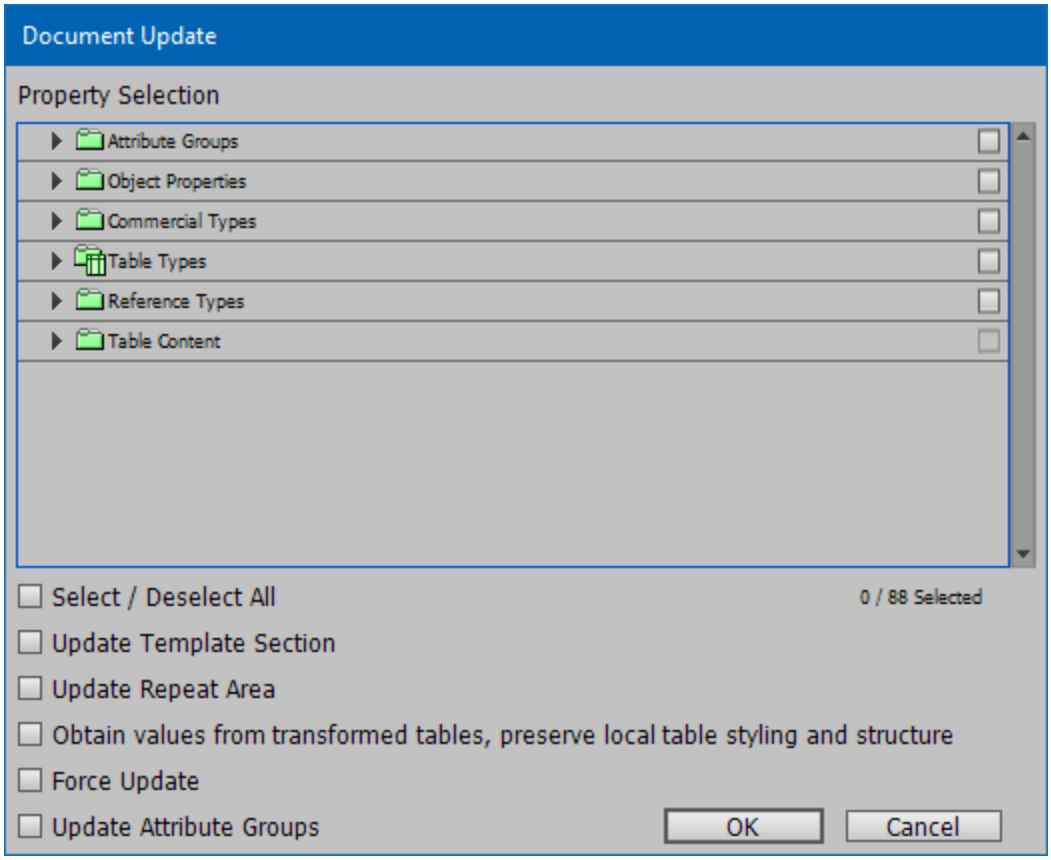
Template Type

Click to select the type of template that you would like to create. See the **Templates in STEP Publisher** topic for more information.



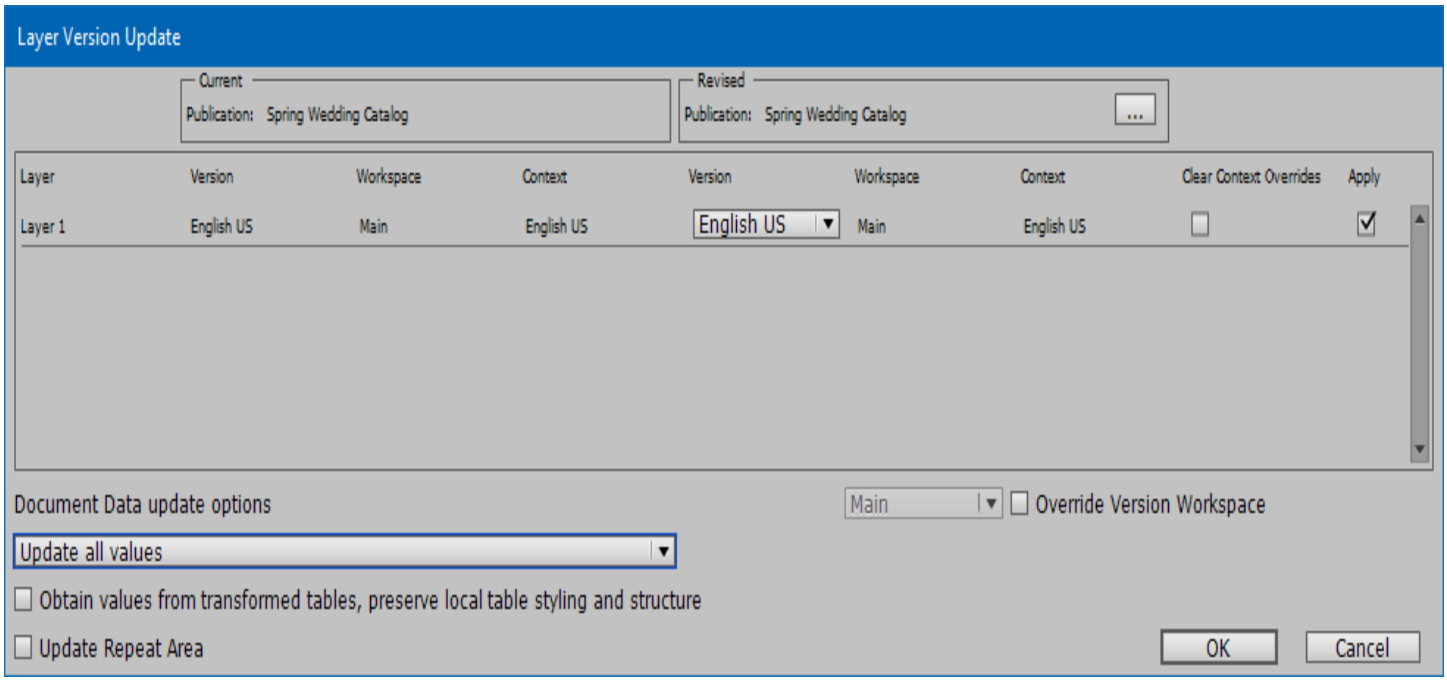
Update Document Data

Launches the **Document Update** dialog. See the **Updating Documents From InDesign** topic for information on this functionality.



Layer Version Update

Use this command to switch context / workspace for an InDesign version layer of your own choice. See the **Working With Version Layers** topic for more information.



Check DB Update

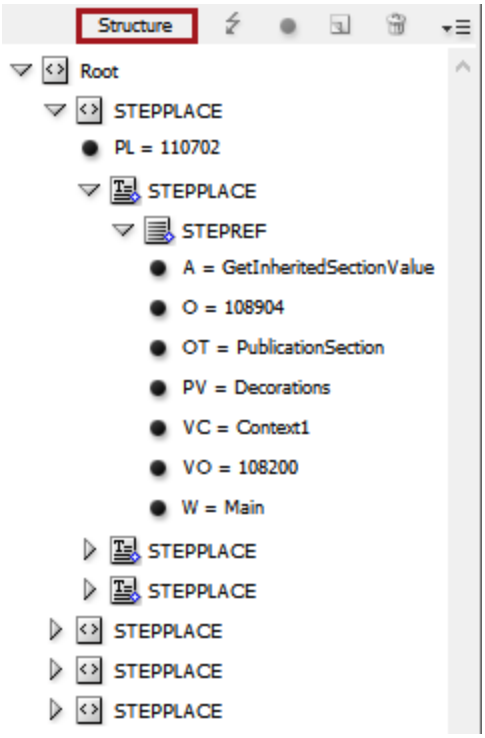
Use this command to check the page against the STEP database and list all the cases where a newer version of the data exists in STEP. For more information, see the **Updating Documents From InDesign** topic.

Relink Assets

See the **Relinking Assets in STEP Publisher** topic for information on this functionality.

Cleanup Mount Tags

Use this command to remove STEPXML tags from the XML structure after deleting a mounted object from the page. Not required if you use the **Unplace selected object** option in the STEP Structure View panel.



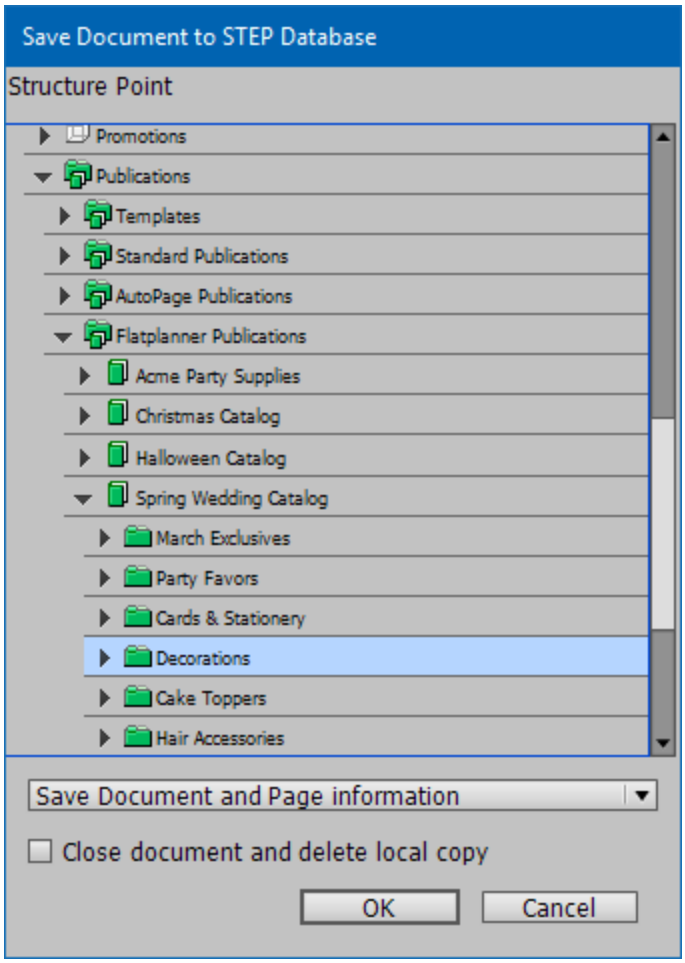
For more information, see the **Mounting Products** topic.

Table Settings

Launches the Table Settings dialog. See the **Configuring Table Styles in Publication Templates** topic in the **Tables** documentation for more information.

Save Document to DB

Launches the **Save Document to STEP Database** dialog. Use this command to save your InDesign templates and page(s) back to the STEP database instead of (or in addition to) storing them only on your local hard drive. See the **Saving Finalized InDesign Documents to STEP** topic for more information.



Writeback to DB

Launches the **Writeback to DB** dialog. Use this command to write back mounted attribute content from InDesign to STEP. This feature allows you to make changes to data on your mounted InDesign page, then make the same change to the data in STEP without having to open the workbench.

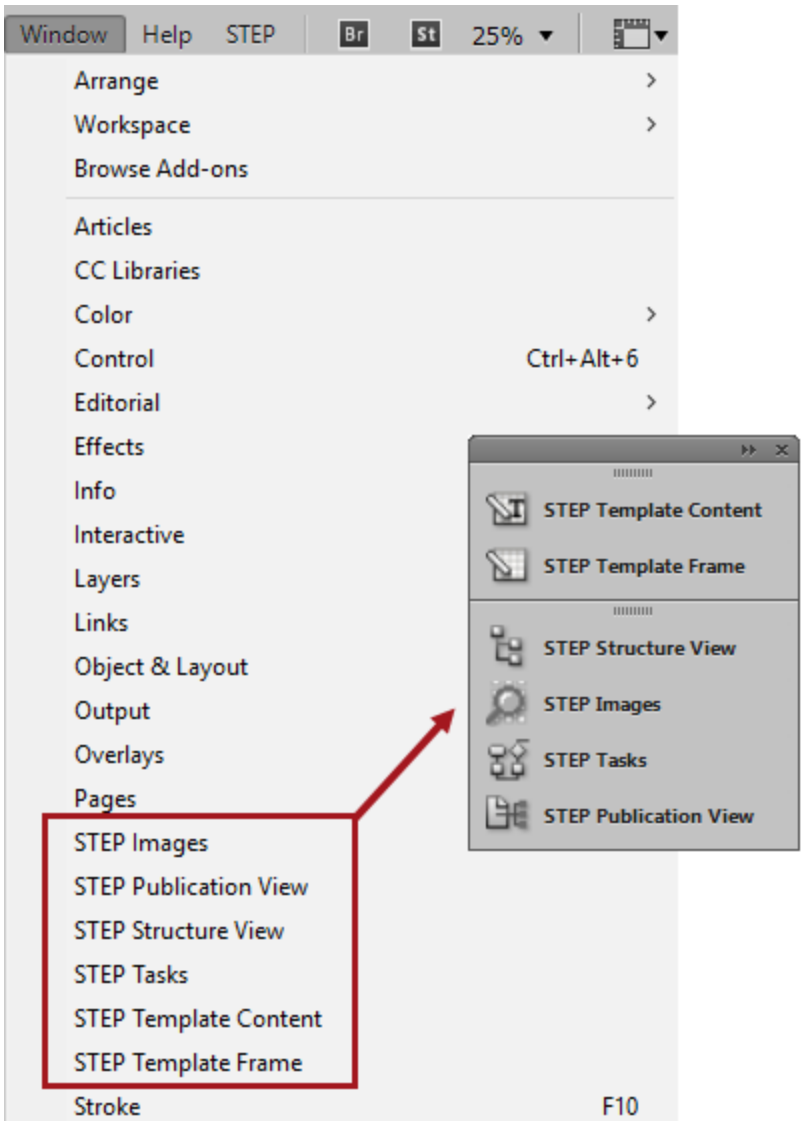
For more information, see the **Writing Data Back to STEP** topic.

Dump Document Data

Use this command to save an XML file containing information about the document, such as context, workspace, mounted objects, layers, and page information. This file is used for troubleshooting.

STEP Panels

The STEP panels (also referred to as *panels* in various locations throughout this guide) are accessed from the **Window** menu on the application bar across the top of the InDesign interface. For more information, see **STEP Panels in InDesign**.


Window
Help
STEP
25%
Arrange
Workspace
Browse Add-ons
Articles
CC Libraries
Color
Control
Ctrl+Alt+6
Editorial
Effects
Info
Interactive
Layers
Links
Object & Layout
Output
Overlays
Pages
STEP Images
STEP Publication View
STEP Structure View
STEP Tasks
STEP Template Content
STEP Template Frame
Stroke
F10
STEP Template Content
STEP Template Frame
STEP Structure View
STEP Images
STEP Tasks
STEP Publication View

STEP Publisher Multi-Language Support

Adobe InDesign CS6 and CC clients natively support the display of different languages in all menus, dialog prompts, and panels. The STEP menu and all STEP Publisher panels also conform to these language changes.

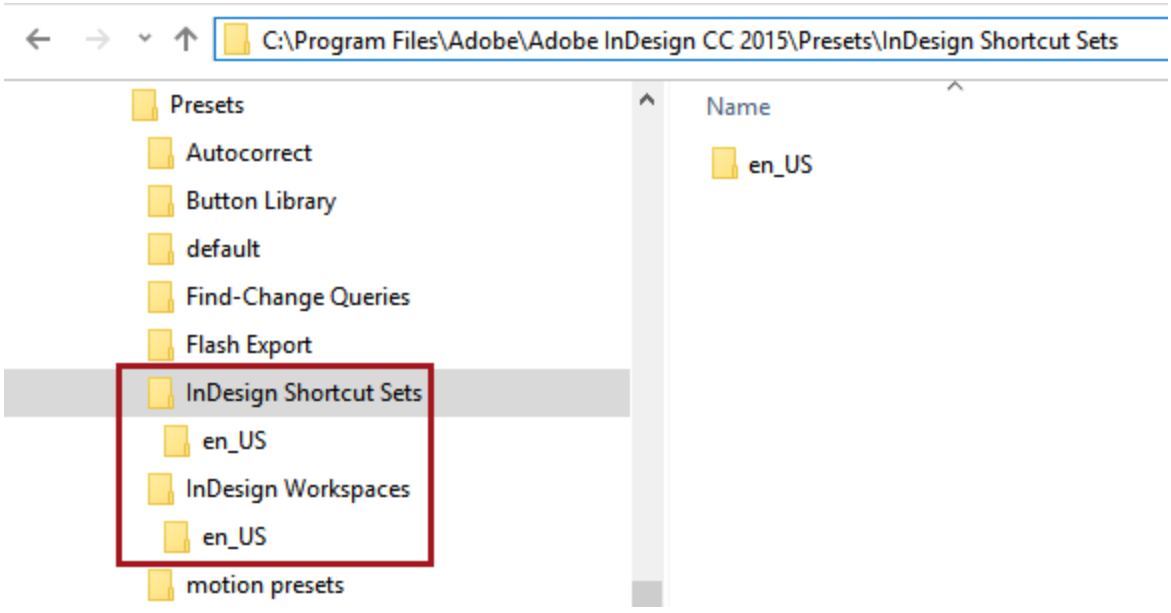
The following languages are supported:

- Chinese (zh_CN)
- Danish (da_DK)
- English (en_US)
- Finnish (fi_FI)
- French (fr_FR)
- German (de_DE)
- Norwegian (nb_NO)
- Portuguese (pt_BR)
- Spanish (es_ES)
- Swedish (sv_SE)

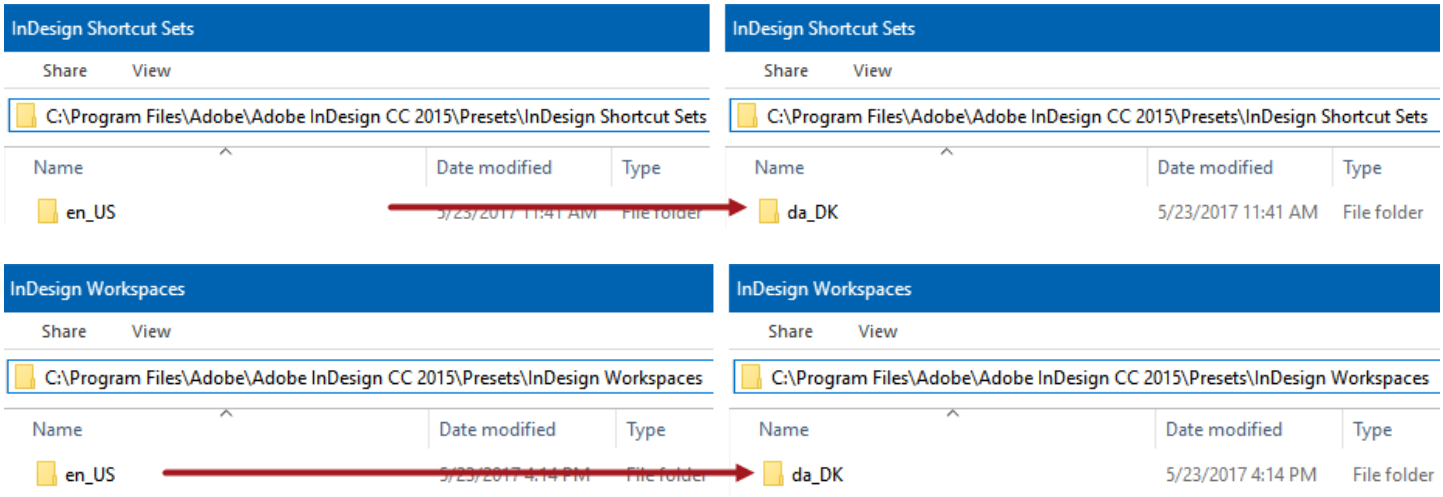
To change the language display within InDesign, two folders that appear within the Presets folder must be renamed. The typical locations of these folders on a Windows platform within the US are, for example:

- C:\Program Files\Adobe\Adobe InDesign CC 2015\Presets\InDesign Shortcut Sets**us_EN**
- C:\Program Files\Adobe\Adobe InDesign CC 2015\Presets\InDesign Workspaces**us_EN**

Note: Changing the names of these folders on your computer may require administrator permissions.

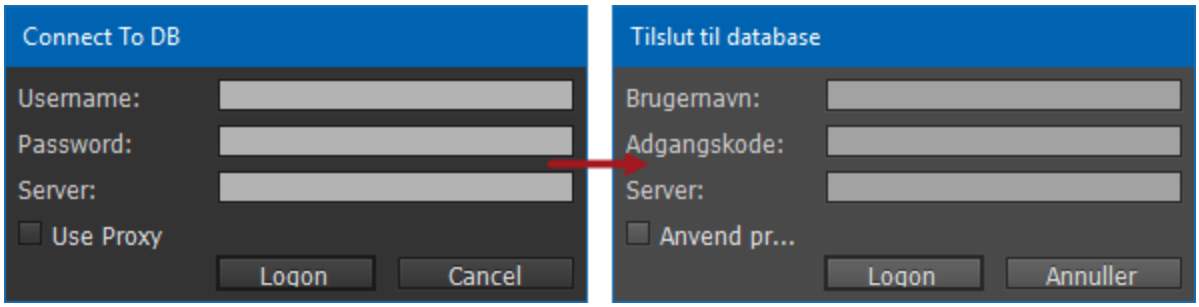


In both folders, there should only be a single folder with the language currently being used by InDesign. Rename this folder to the desired language using the Alpha 2 ISO standard shown in the bullet list above. For example, to view the menu items in Danish instead of English, change the folder names from en_US to da_DK as illustrated below.

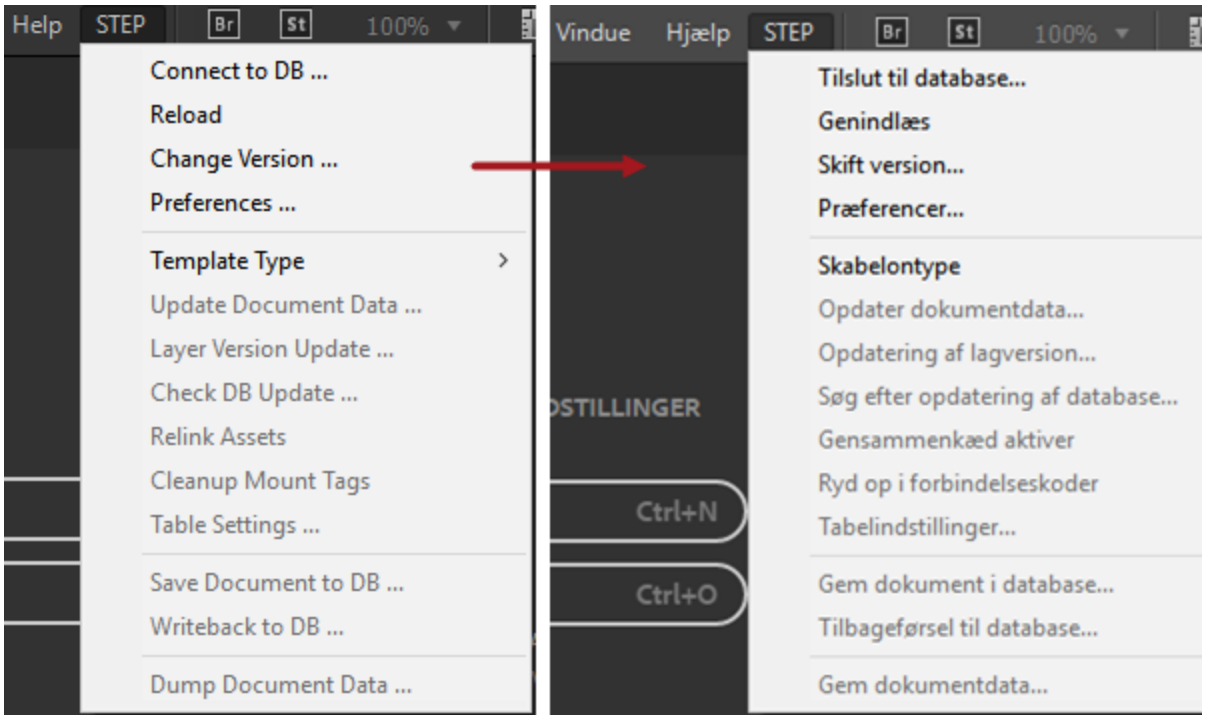


Restart InDesign and the new language will appear throughout the program and on the STEP menus. The following screenshots show examples of STEP Publisher menus and panels, in English on the left and Danish on the right.

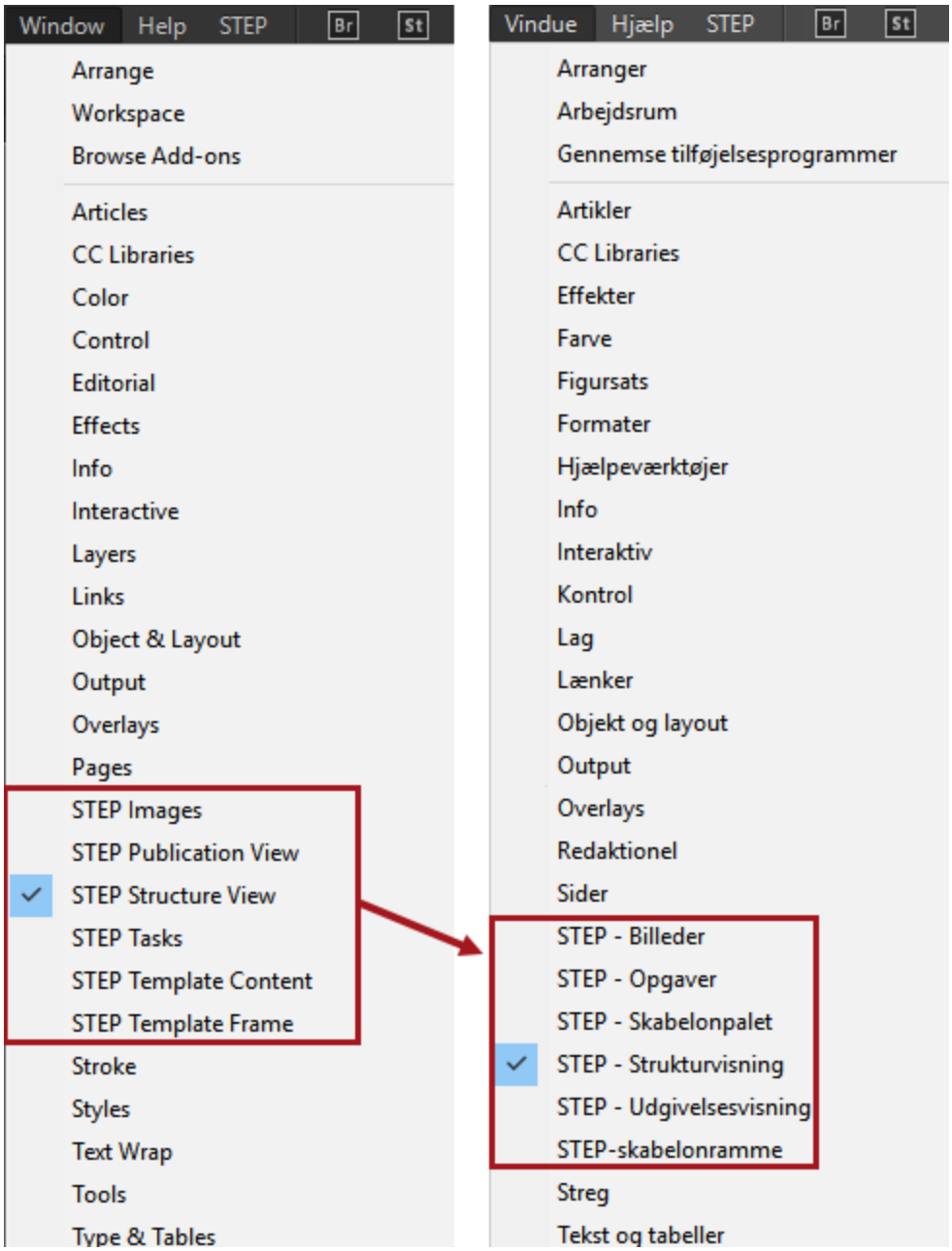
- Connect To DB dialog:



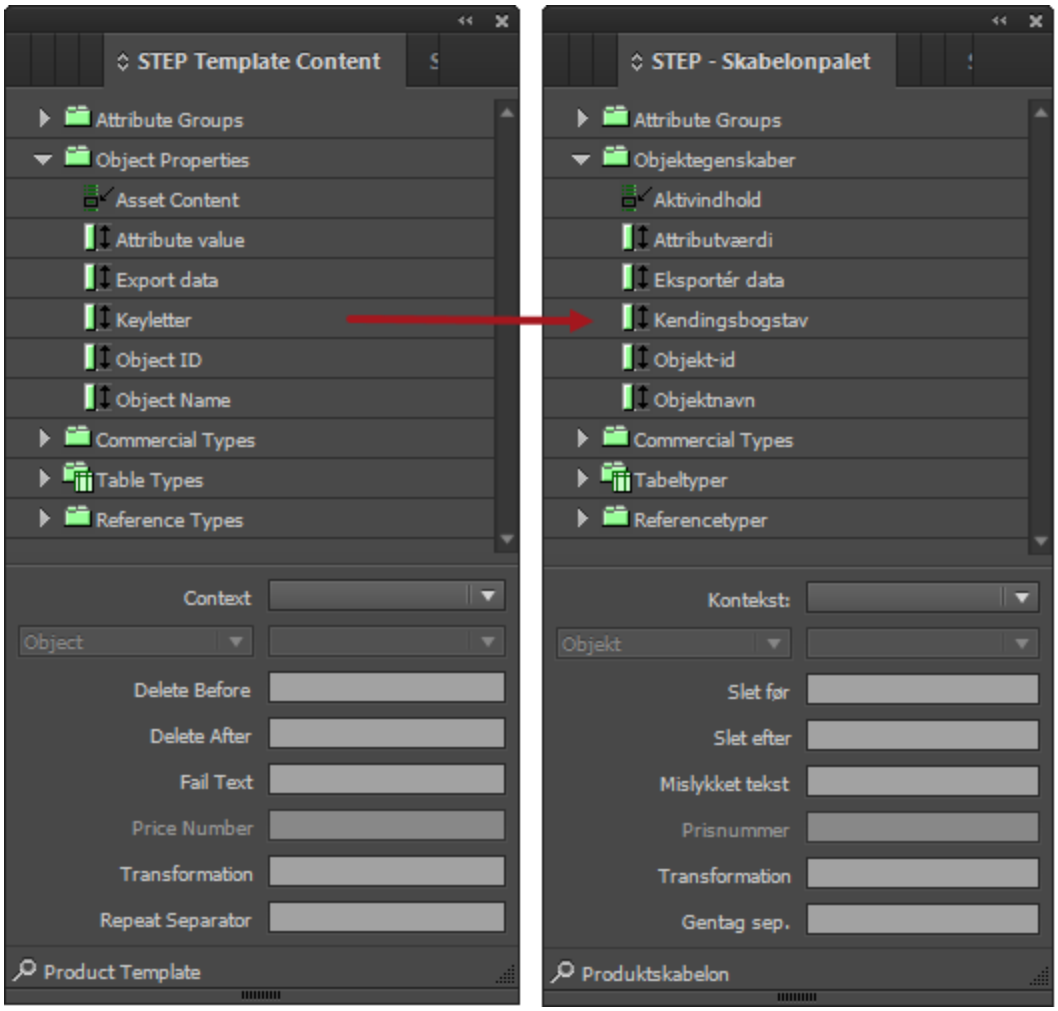
- STEP menu:



- Window menu, with STEP panels:



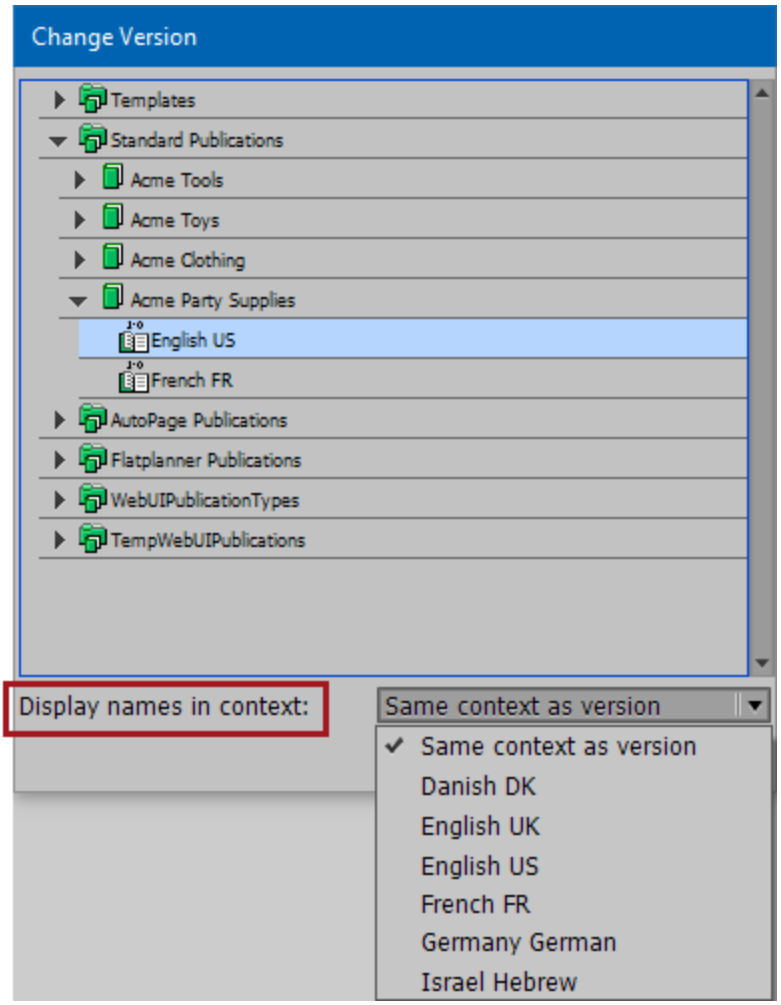
- STEP Template Content panel:



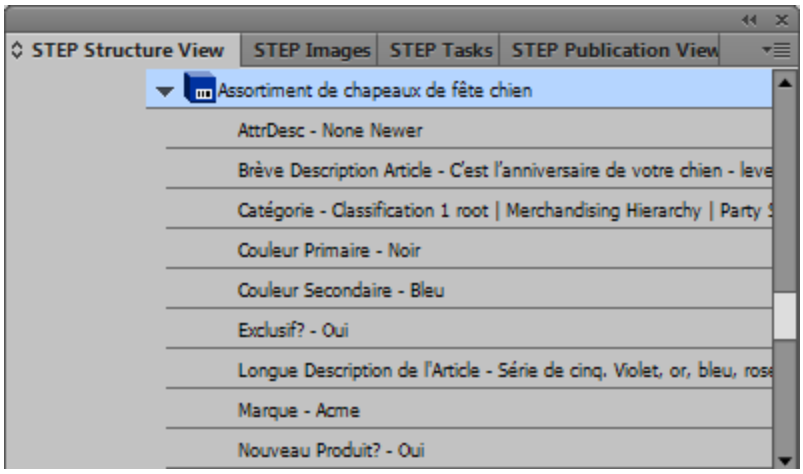
Changing the Display Language of STEP Objects in InDesign

To display the names of STEP *objects* in a different language within the STEP panels (i.e., folders in the product hierarchy in the STEP Structure View and attributes / attribute groups in the STEP Template Content panel), a display language must be chosen from the 'Display names in context' dropdown on the 'Change Version' dialog within InDesign (accessed via STEP > Change Version ...).

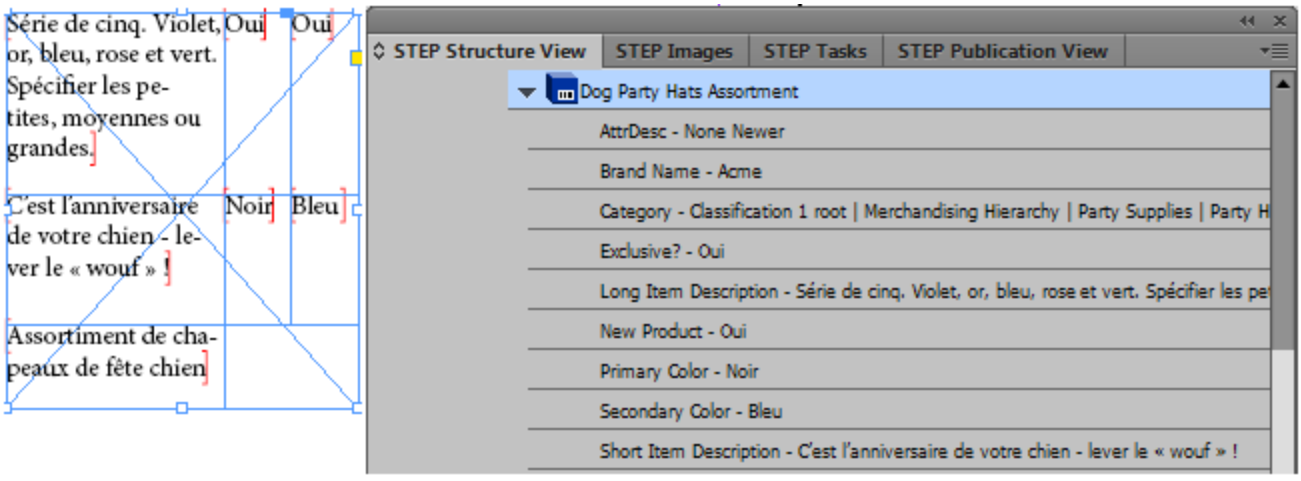
The 'Display names in context' dropdown menu allows you to choose the display language for object names and attribute names in the following STEP panels: STEP Structure View, STEP Template Content, STEP Images, and STEP Publication View.



This feature is intended for users who need to view the names of names of attributes, attribute groups, products, classifications, entities, and publication hierarchy objects in a different language than that of the publication version they are currently working with. For example, DTP operators in the US who only speak English may have no understanding of what objects they are mounting if working in a French publication version and all object and attribute names are displaying in French in the STEP Structure View panel, as pictured in the following screenshot.



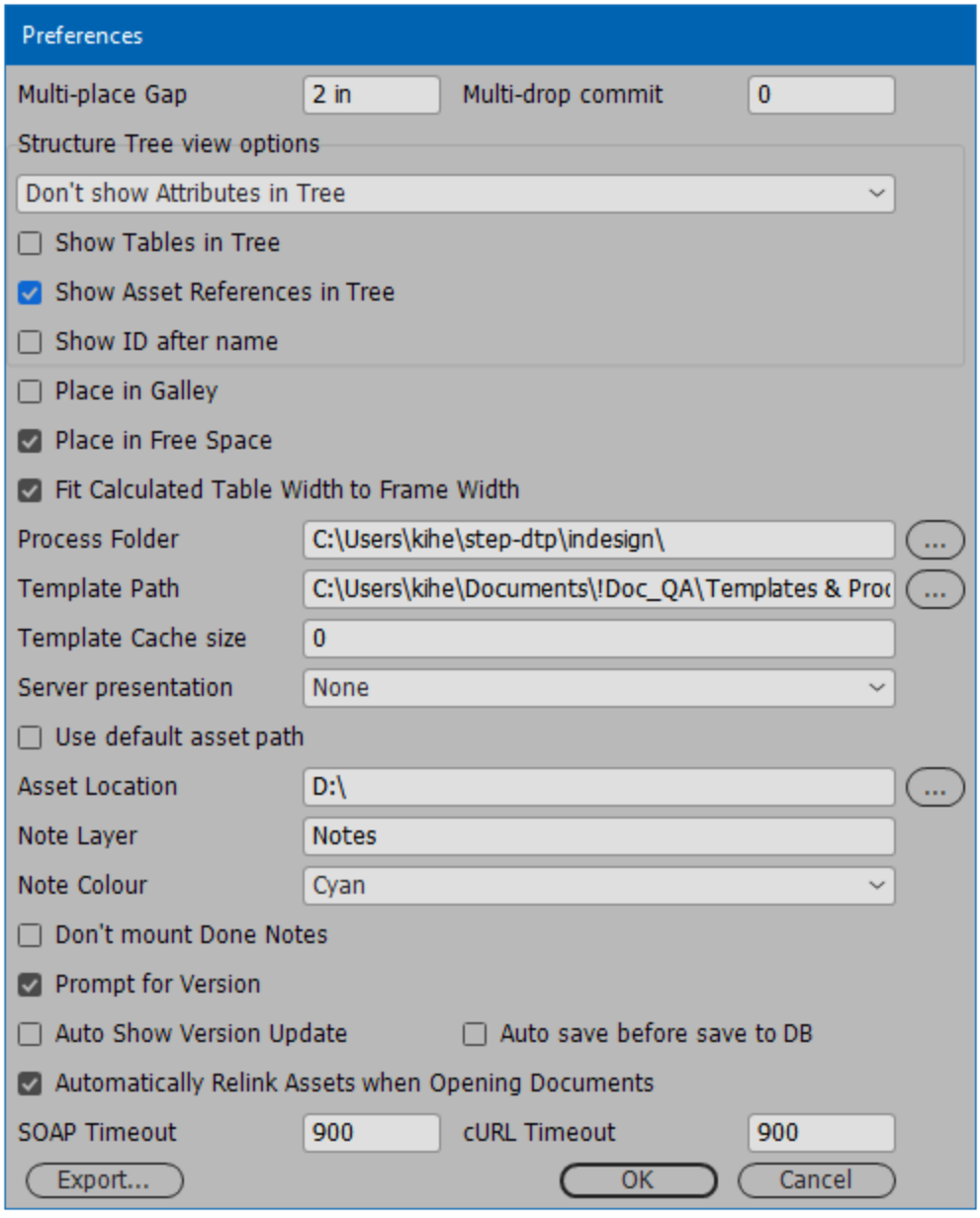
To remedy this situation, the English speakers would select 'English US' from the 'Display names in context' dropdown menu. The following screenshot shows the same object in the STEP Structure View panel while working with a French publication version but with English chosen as the display language. The object and attribute *names* display in English but the attribute *values* display in French and the content mounted on the page is in French.



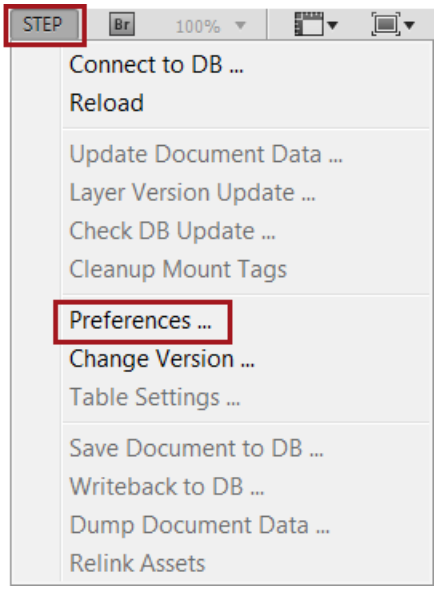
For more information about creating a publication version, see the **Publication Versions** topic in the **Publication Maintenance** documentation.

Configuring the STEP Preferences Menu

The STEP **Preferences** menu in STEP Publisher contains settings that control much of the behavior of the STEP panels within InDesign as well as how tables are mounted, where hi-res images are mounted from, the location of product templates when mounting pages through 'drag and drop' operations, and more.



The Preferences menu is accessed by navigating to STEP > **Preferences ...** from the InDesign application bar across the top of the InDesign interface.

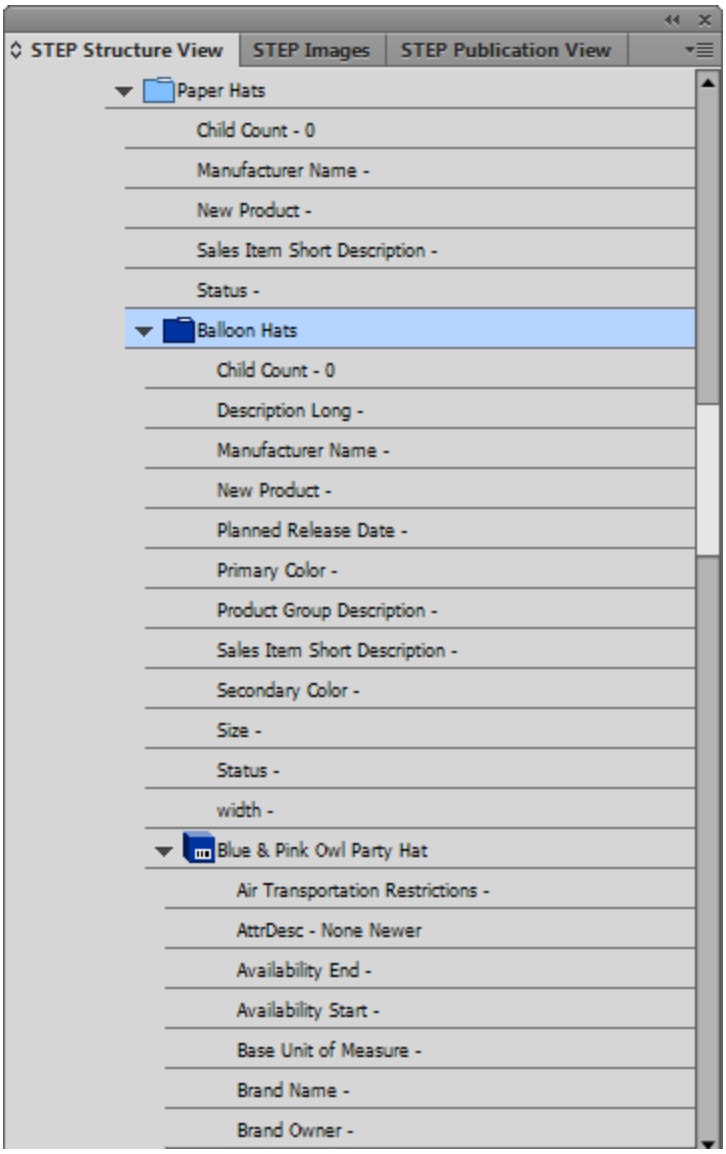


The following list describes the settings contained within the Preferences menu:

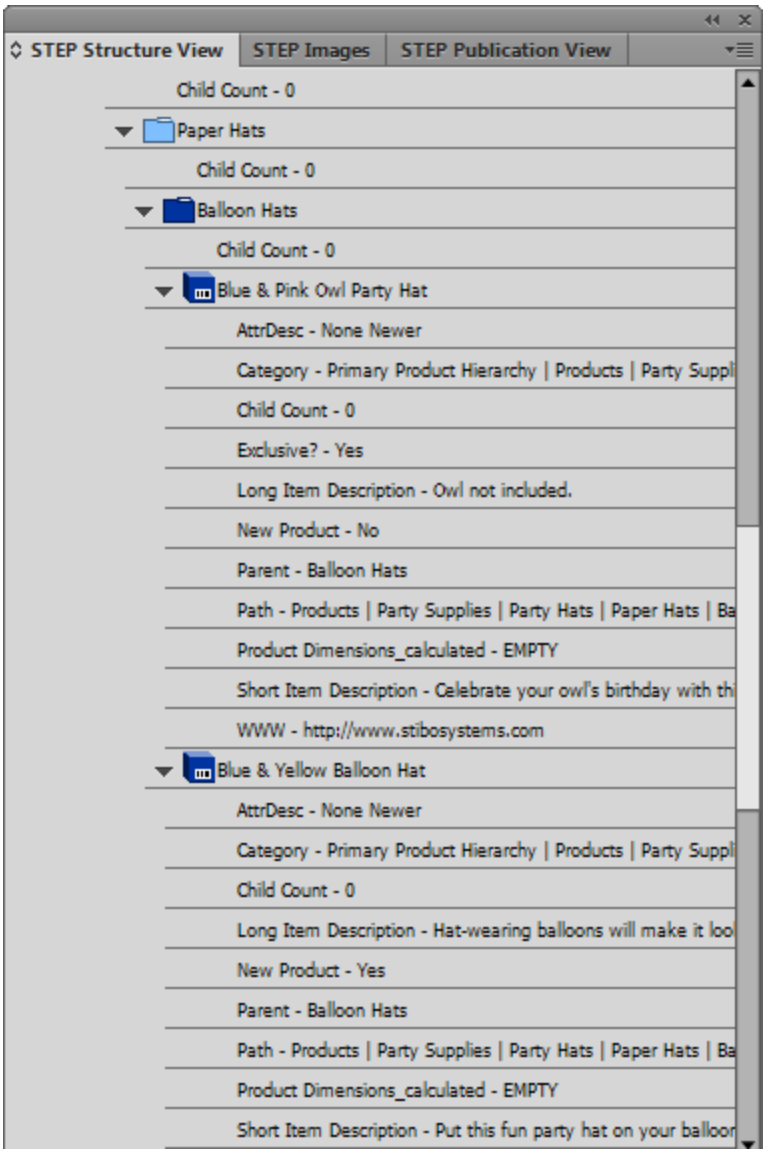
- **Multi-place Gap:** The distance added is the distance that STEP'n'design will add between objects when mounting multiple objects in the same drag and drop operation.
- **Multi drop commit:** The number added is the frequency of mount that should take place before a commit is made, when mounting multiple objects in the same drag and drop operation.

  This option is only intended for use with an InDesign script that enables the mounting of many products at one time. It otherwise serves no purpose to standard users and should always be left as zero (0).

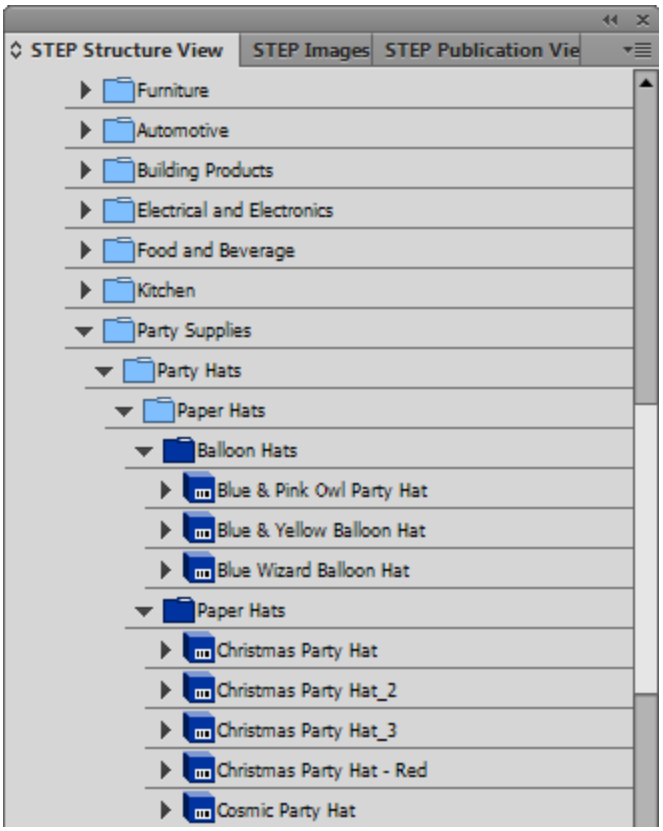
- **Structure Tree view options:** Controls the visibility of attributes when viewing objects in the **STEP Structure View** panel. Options are **Show all Attributes in Tree**, **Show Attributes with Values in Tree**, and **Don't show Attributes in Tree**. Showing attributes makes them available for page mounting and for converting sample documents into product templates.
  - The following screenshot shows a sample STEP Structure View with **Show all Attributes in Tree** selected:



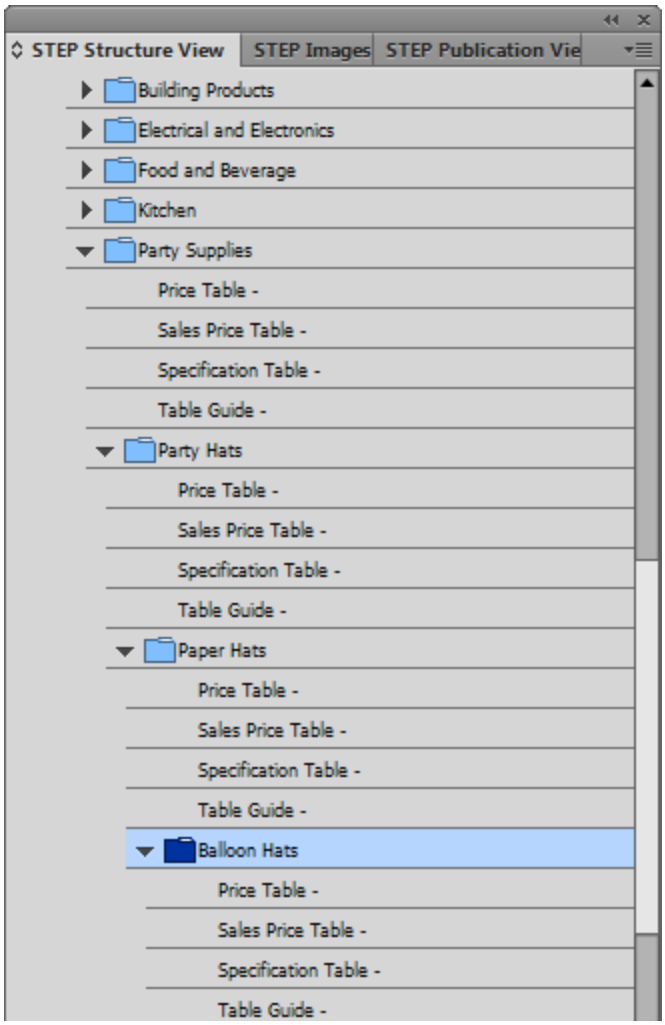
- This screenshot shows a sample STEP Structure View with **Show Attributes with Values in Tree** selected. This option reduces the number of attributes displayed in the tree, making it easier to locate the relevant attributes for mounting.



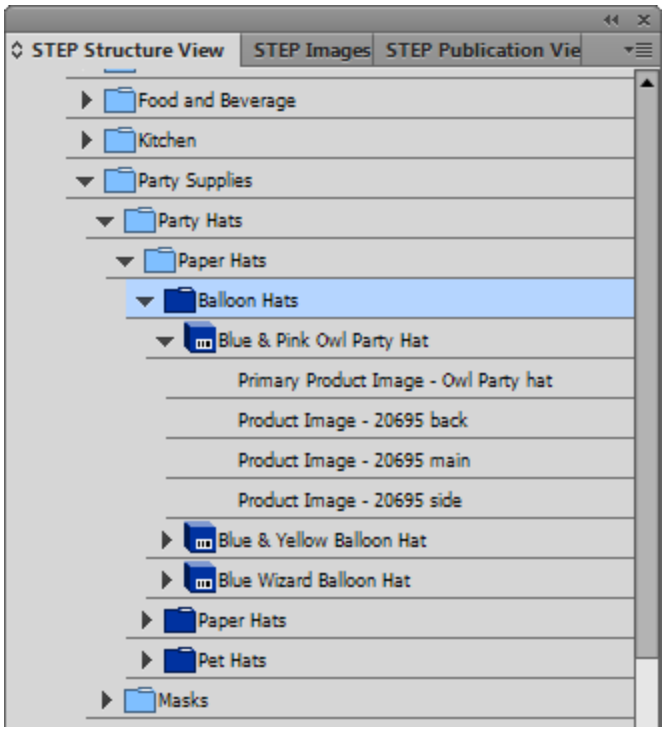
- This screenshot shows a sample STEP Structure View with **Don't show Attributes in Tree** selected.



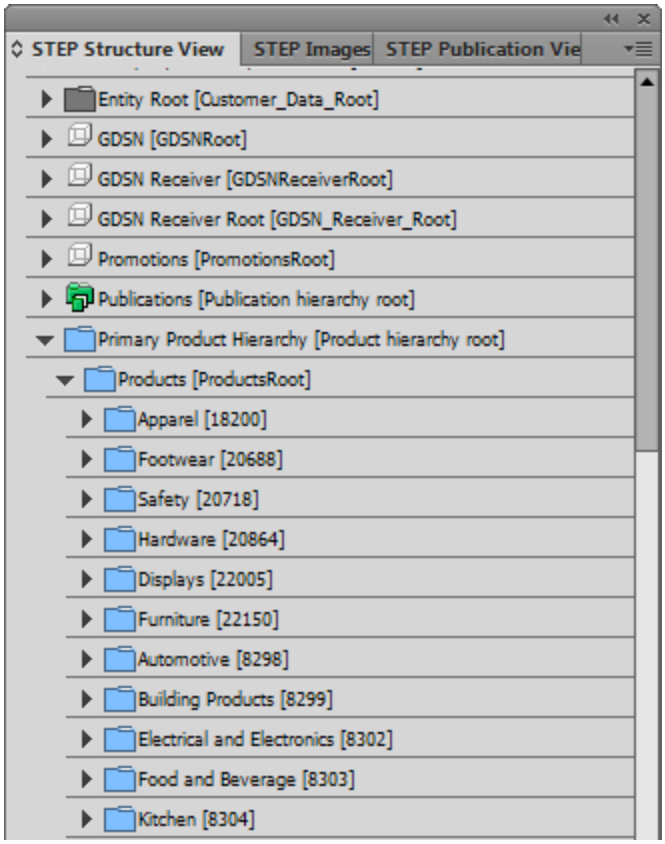
- **Show Tables in Tree:** Check this box to display the tables that are linked to products and classifications in the STEP Structure View panel, thus making them available for page mounting and for converting sample documents into product templates.



- **Show Asset References in Tree:** Check this box to display the STEP asset references linked to Products and Classifications in the STEP Structure View panel, thus making them available for page mounting and converting sample documents into product templates.



- **Show ID after name:** Check this box to display both object IDs and Names in the different STEP panels. The following screenshot shows an example using the STEP Structure View panel.



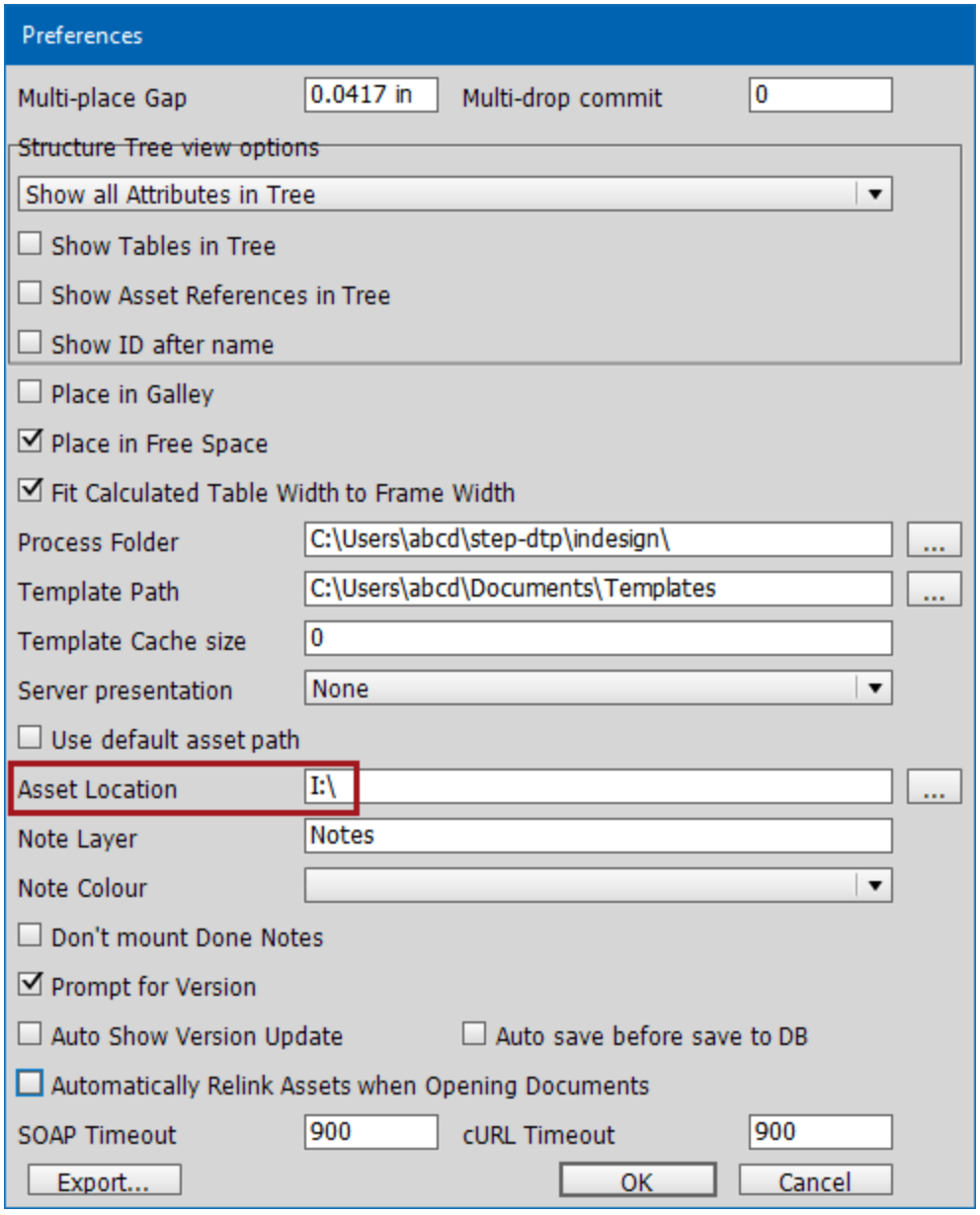
- **Place in Galley:** Selecting this checkbox allows you to mount the contents of a Galley product template into the text frame of a Galley page template by using drag and drop. This option does not allow the mounting of an entire galley *page* (including images), which can only be done using Flatplanner. For more information, see the **Galley Product Templates** section of the **Flatplanner** documentation.
- **Place in Free Space:** Check this box to make STEP'n'design place your element in the first available free space on the page when you drag and drop it onto the publication template or mounting page. If not selected, the object will be placed in the specific location where you drop it.
- **Fit Calculated Table Width to Frame Width:** Check this box to adjust the width of calculated table columns (starting with the widest column) until the width is identical to the width of the frame if a table width is not defined in STEP.
- **Process Folder:** This is the path in the directory structure in which STEP Publisher stores information. This folder may contain a number of items: inSTEPLogOptions.xml to control logging and sub-folders for logs (default destination for logging), tmp (where any temporary files are stored), comms (where communications trace information is stored for diagnostic), and scripts (JavaScript event handler[s], when applicable). The system will use the default path (C:\Users\[User_Name]\step-dtp\indesign\) if not set by the user.
- **Template Path:** This is the path to the folder / directory where your product templates are stored.
- **Template Cache size:** Increases performance when working with templates saved in STEP. Size is defined in MB and a setting of 2 to 5 MB is normally suitable for most users.
- **Server Presentation:** Defines which product template should be used for mounting objects.
    - Choose **None** to use the locally stored product template specified in the **STEP Structure View** panel.
    - Choose **Product default** to use the default product template assigned to the object in STEP. For more information on default product templates, see the **Default InDesign Product Templates** topic.
    - Choose **Publication rules** to use the product template(s) and/or to reuse a preexisting layout specified by the Object Layout pagination rules specified in STEP. For more information, see the **Mounting Objects Using Pagination Rules** topic.
- **Use Default Asset Path:** If checked, a default asset push path will be used to mount images. A default asset path is typically configured by Stibo Systems. Do not check if an Asset Location is specified in the Asset Location field.
- **Asset Location:** If a system has been set up to use asset push, then a path to the location of the images is specified. This field should be left empty if your system has not been set up to use asset push. If the Asset Location is left empty, the original image will be downloaded from STEP. The asset path will not work for images stored locally other than the asset push location. See the **Linking to an Asset Location** topic for more information.
- **Note Layer:** *(Only relevant for Flatplanner)* Type the name of the layer in which the Notes from the Flatplanner should be shown.
- **Note Colour:** *(Only relevant for Flatplanner)* Select a background shading color for Flatplanner Notes when mounted on the InDesign page.
- **Don't mount Done Notes:** *(Only relevant for Flatplanner)* Check this box to prevent any Flatplanner Notes marked 'Done' from mounting on the InDesign page.

For more information on the Flatplanner Note settings, see the **Adding Notes and Free Text** topic in the **Flatplanner** documentation.

- **Prompt for Version:** Check this box to have STEP Publisher prompt you to select a publication version every time you mount an object onto a page.
- **Auto Show Version Update:** Check this box to automatically show the **Change Version** dialog box whenever your version has been redefined in STEP (e.g., if the workspace on a version has been changed from Main to Approved).
- **Auto Save before save to DB:** Check this box to automatically save your documents (templates and actual pages) locally before saving them to STEP. Since documents must be saved locally anyway before they can be saved to STEP, checking this box will eliminate the clicks needed to save the documents manually.
- **Automatically Relink Assets when Opening Documents:** Check this box to enable automatic relinking of assets when documents are opened that contain broken asset links. Image links become broken when a document contains images that are no longer linked to the original location of the actual image files, and can also occur in environments that use a mixture of PC and Mac platforms to mount InDesign pages. See the **Relinking Assets in STEP Publisher** topic for more information.
- **SOAP Timeout:** Enter a configurable timeout for SOAP (Simple Object Access Protocol) operations in order to improve performance on slow systems. Default is 900 seconds (15 minutes).
- **cURL Timeout:** Enter a configurable timeout for cURL operations in order to improve performance on slow systems. Default is 900 seconds (15 minutes).
- **Export:** Click this button to save your STEP Publisher preferences into a text file. This file can be used by Stibo Systems support personnel to help troubleshoot issues.

Linking to an Asset Location

This topic describes a common setup for users of STEP Publisher when connecting to an **Asset Location** from within the InDesign client. The asset location is specified in the STEP **Preferences** menu in InDesign. Typically, the asset location contains the path to high-resolution images that have been pushed from STEP onto the DTP (InDesign) server through an asset push event queue.



In many scenarios, the images on the InDesign server are pushed again from the InDesign server to a local file location using a third-party file synchronization application such as rsync. But, even when using such an application, the file path placed into the Asset Location field in STEP Preferences must be an exact match to the

file path of the image location on the InDesign server. This ensures that the image links remain unbroken between the mounted pages, the InDesign server, and STEP. (If these links become broken, they can be fixed using the asset relink features of STEP Publisher. See the next topic in this documentation, **Relinking Assets in STEP Publisher**, for information on how to repair broken image links.)

Assumptions

This topic does not cover the following and assumes that the applicable steps have been taken prior to users connecting to an asset location in InDesign:

- How to configure Asset Push event queues. For more information, see the **Creating and Maintaining Asset Push Configurations** topic in the **Digital Assets** documentation.
- How to set up an InDesign server. For more information, contact Stibo Systems.
- How to remotely connect to an InDesign server. The method of connection will vary depending on your operating system and server setup. For more information, contact Stibo Systems.
- Alternate ('non-standard') setups for connecting to an asset location, such as connecting to an external image storage platform such as Scene7. For information on non-standard setups, contact Stibo Systems.
- How to share folders and map network drives. As these processes are standard Windows and Mac functionality, they are outside the scope of this documentation.

About the InDesign Server

An InDesign server is used in conjunction with STEP for the following Publisher-related capabilities:

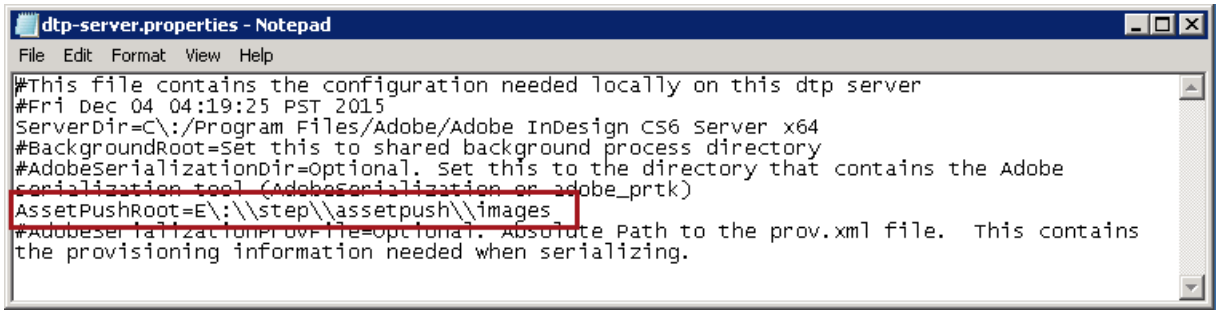
- Proof View
- Creating documents via AutoPage
- Flatplanner planned page previews
- Creating documents from a Flatplan via a Flatplanner workflow
- Generating PDFs from documents in STEP
- Including actual pages when duplicating publications
- Import of Publication Transfer Packages
- Document-Asset Re-link

An InDesign server is not required for 'standard' STEP Publisher functionality ('drag-and-drop'), as users can manually create publications by dragging and dropping objects onto pages, then manually saving the pages back to STEP. However, an InDesign server is required to autogenerate pages, and it unlocks much of the functionality of STEP Publisher and its associated components, as listed above.

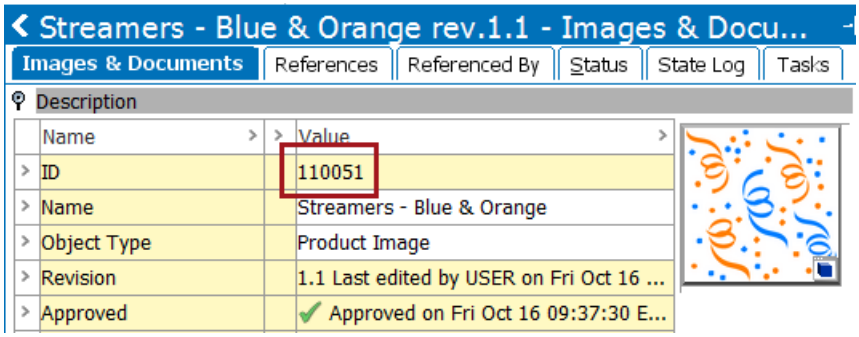
How the InDesign Server Locates an Image

In a 'standard' setup, asset push will push high-resolution images out to a folder on the InDesign server (though images can be pushed to any server within the STEP landscape, based on user needs). When the InDesign server application automatically mounts pages based on requests from STEP, it is 'told' where to locate high-resolution images by piecing together information that exists in the following locations. For information regarding the Asset Push locations, see the **Asset Push** topic in the **Digital Assets** documentation.

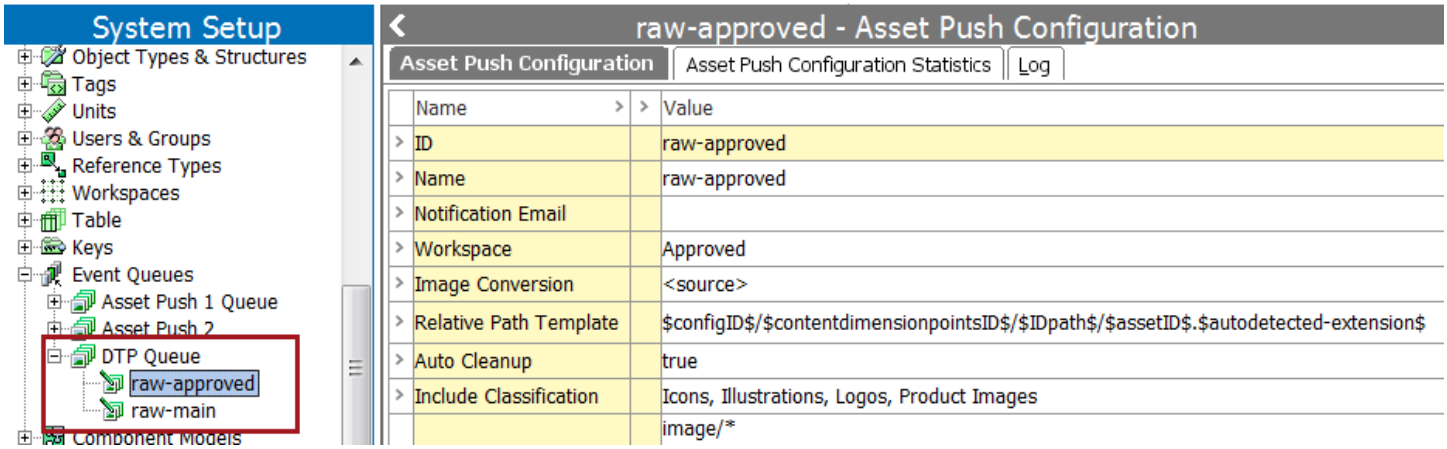
1. **dtp-server.properties**: This file is located on the InDesign server and contains the 'stem' file path of the image location, for example, E\:\\step\\assetpush\\images



2. **Asset ID:** The ID of the image



3. **sharedconfig.properties**: This file is located on the STEP application server and contains configuration entries that tell the InDesign server the ID of the Asset Push Configuration (created in the workbench in System Setup) to use based on the workspace that is currently in use. For this example, the 'DTP Queue' event queue contains two asset push configurations, 'raw-approved' and 'raw-main.'

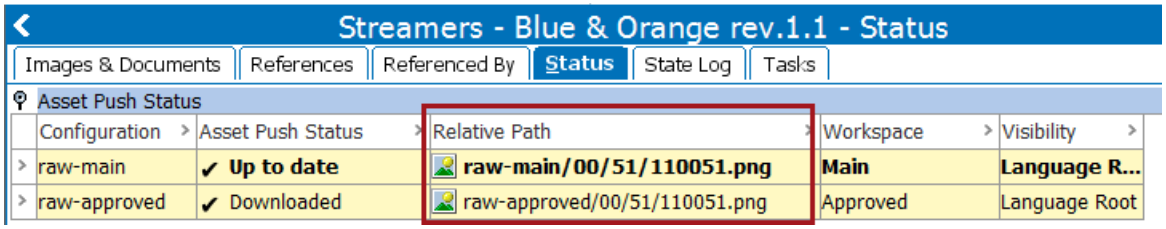


Configuration entries in the sharedconfig.properties file point the InDesign server to the appropriate queue. AssetPush.DTPConfiguration is the default queue to use when the workspace is Main, and AssetPush.DTPConfiguration.Approved is the default queue to use when the workspace is Approved.

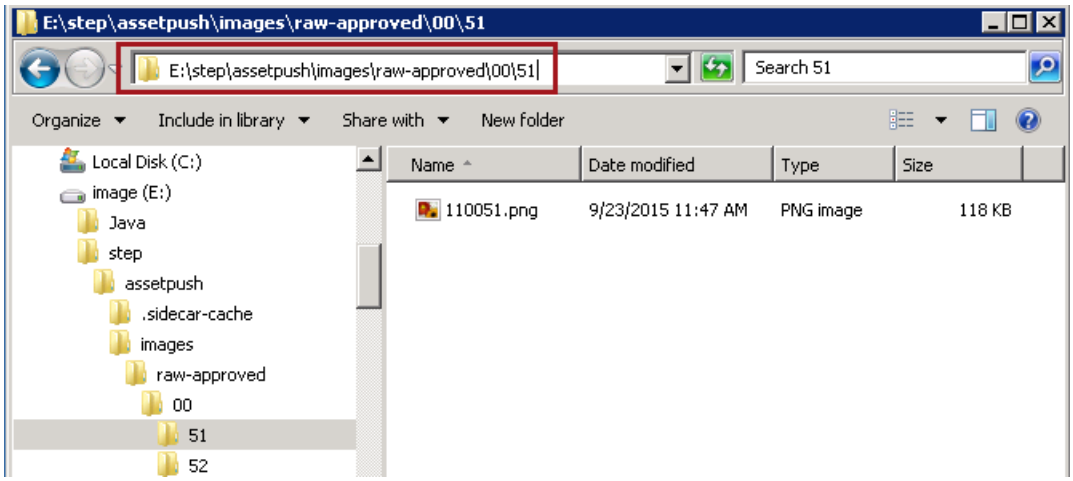
Note: It is possible to configure these entries to pull images from a different workspace than the publication version that you are working in. For example, if you need to pull textual content from the Approved workspace but images from the Main workspace, then raw-main would be mapped to AssetPush.DTPConfiguration.Approved in the below screenshot, overriding the publication's workspace for images.

```
#================================================================#
# AssetPush event queue configuration. Must always be configured!
#================================================================#
EnableAssetPushQueue = yes
AssetPush.UseSystem = new
AssetPush.DTPConfiguration = raw-main
AssetPush.DTPConfiguration.Approved = raw-approved
#AssetPush.LegalChars = -$0-9$$a-z$$A-Z$
```

The combination of numbers 2 and 3 above (Asset ID plus Configuration ID) enable the InDesign server to obtain the 'STEP path' of the image. For example, raw-main/00/51/110051.png. The path is the result of the setup of the Relative Path Template. (For information on the Relative Path Template, see the **Relative Path Template** section of the **Asset Push** documentation.)

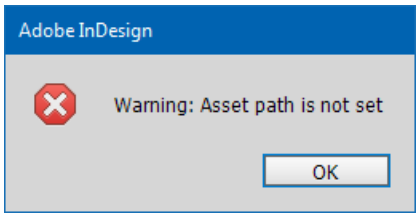


When this 'STEP Path' is combined with number 1 above, the 'stem' path, the InDesign server can now locate the external image by its complete path and file name. For example, E:\step\assetpush\images\raw-approved\00\51.



Setting an Asset Location in InDesign

When mounting documents from InDesign, the **Asset Location** designated in the STEP > **Preferences** menu should be the same image location accessed by the InDesign server. By default, the Asset Location field is blank. When logging into STEP from within InDesign, the error message 'Warning: Asset path is not set' displays every time you log in until an asset path is specified.



To keep this error from appearing, a path to the high-resolution images must be specified in the Asset Location field.

Important: Though acceptable for testing purposes, the Asset Location field should never be left blank in an actual production environment.

Determining the Asset Location

In order to connect to an asset location, you must first know what file path to enter. The following section describes a typical scenario in which images are located on a Windows InDesign server and the high-resolution assets have been pushed from STEP into a file location on this server by use of an asset push event queue.

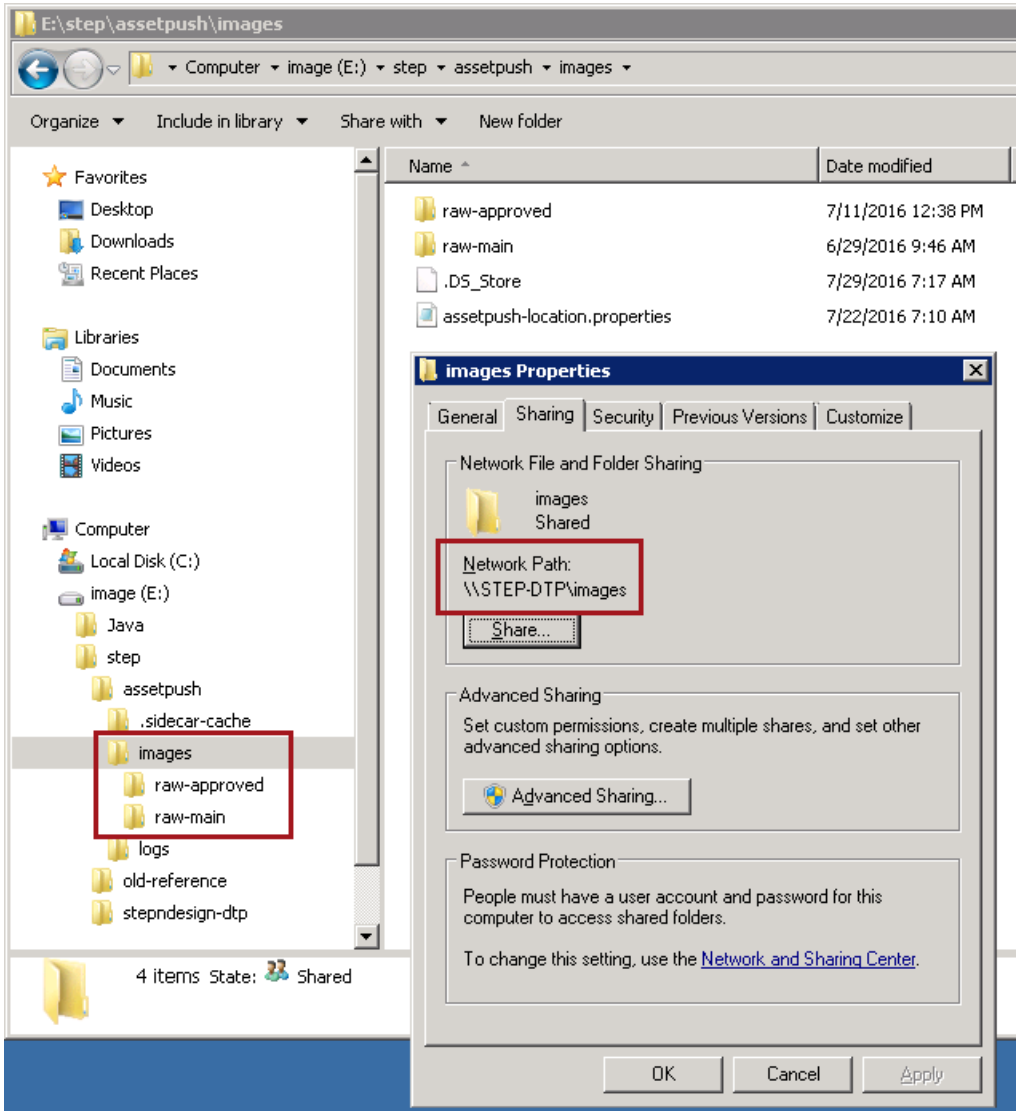
Instructions for Mac users are nearly identical to those for Windows except for Mac file path formats and specifics of how to share folders on a Mac operating system.

Shared File Location

On any file location where images are stored, the folder containing the images must first be shared with users before they can connect. This section assumes that your image folder has already been shared. As the steps to share a folder are standard Windows functionality, they are not outlined in this topic.

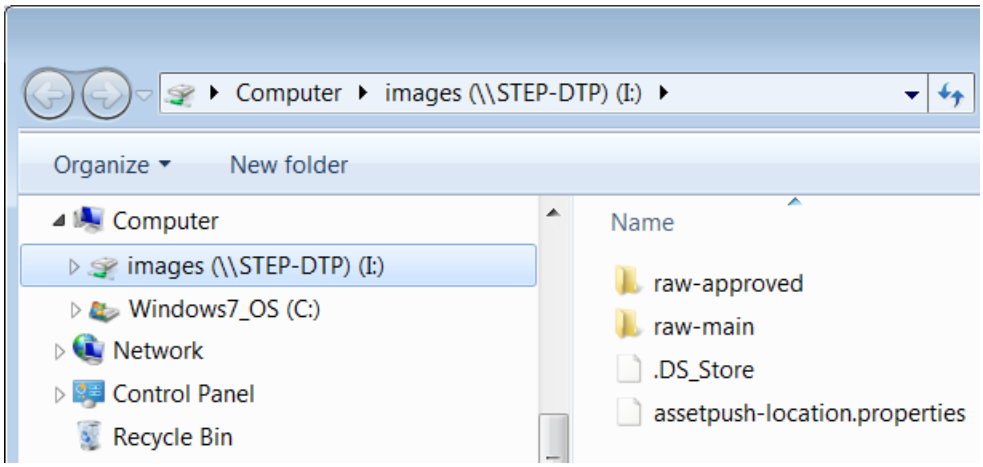
The following screenshot shows a sample 'images' folder hierarchy containing images that have been pushed from the main and approved workspaces in STEP (raw-main and raw-approved, respectively). To determine the correct path to enter into the **Asset Location** field in the STEP Preferences menu:

1. On the InDesign server, navigate to the shared 'images' folder that contains the high-resolution assets pushed from STEP by asset push.
2. Right-click on the 'images' folder and select **Properties** from the menu.
3. In the 'images Properties' dialog, click on the **Sharing** tab. The **Network Path:** that is displayed in the 'Network File and Folder sharing' area is the location that should be specified in the Asset Location field.



4. Instead of directly typing this location into the Asset Location field, however, you must first connect to this location by mapping a network drive to the network path. In the above screenshot, the path is \\STEP-DTP\images.

   (Instructions on how to map to a network drive are not included in this topic, as it is standard Windows functionality.)



5. Once the network drive is mapped, go to STEP > **Preferences...** in InDesign.
6. Click the ellipsis button (...) next to the **Asset Location** field.
7. In the 'Select a Folder' dialog, navigate to the 'images' network drive that you just mapped in step 4.
8. The path to the high-resolution images on the InDesign server is now present in the Asset Location field. In this example, since the path is a mapped network drive, only the letter of the drive name displays.

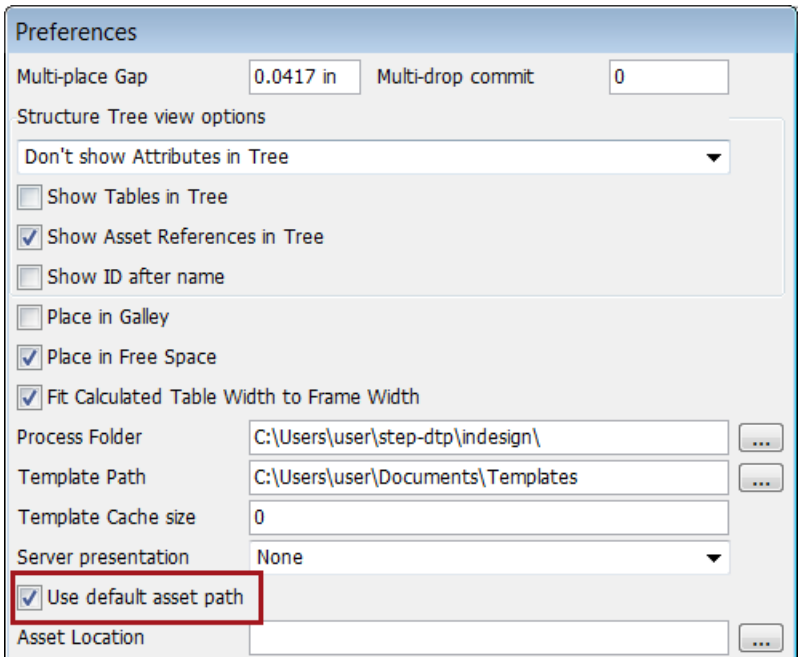
Default Asset Path

A **default asset path** can be set in InDesign that allows users to connect to a client-specific asset location that overrides the default asset push location defined in the sharedconfig.properties file (the queues pointed to by AssetPush.DTPConfiguration and AssetPush.DTPConfiguration.Approved).

To set a default asset path, the **AssetPush.DefaultDTPClientAssetLocation** property must be inserted into the sharedconfig.properties file, followed by the asset location, as such:

AssetPush.DefaultDTPClientAssetLocation = \\\\server/images/AssetPush_highres

If a default asset path has been set in the sharedconfig.properties file, then users should leave the Asset Location field blank in the STEP Preferences menu and instead check the **Use default asset path** box. (If no default asset path has been set up in sharedconfig.properties file, even if this box is checked, it will be exactly as if no image path at all is set up.)

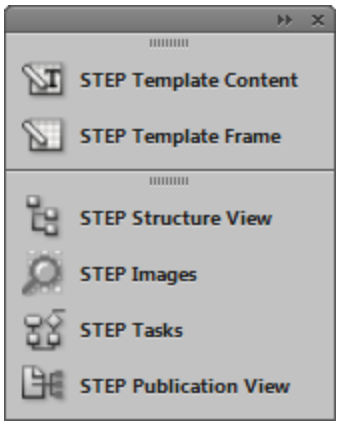


Note: Default asset path cannot be used for production environments that use a mix of PC and Mac clients. The environment must be either all PC or all Mac.

STEP Panels in InDesign

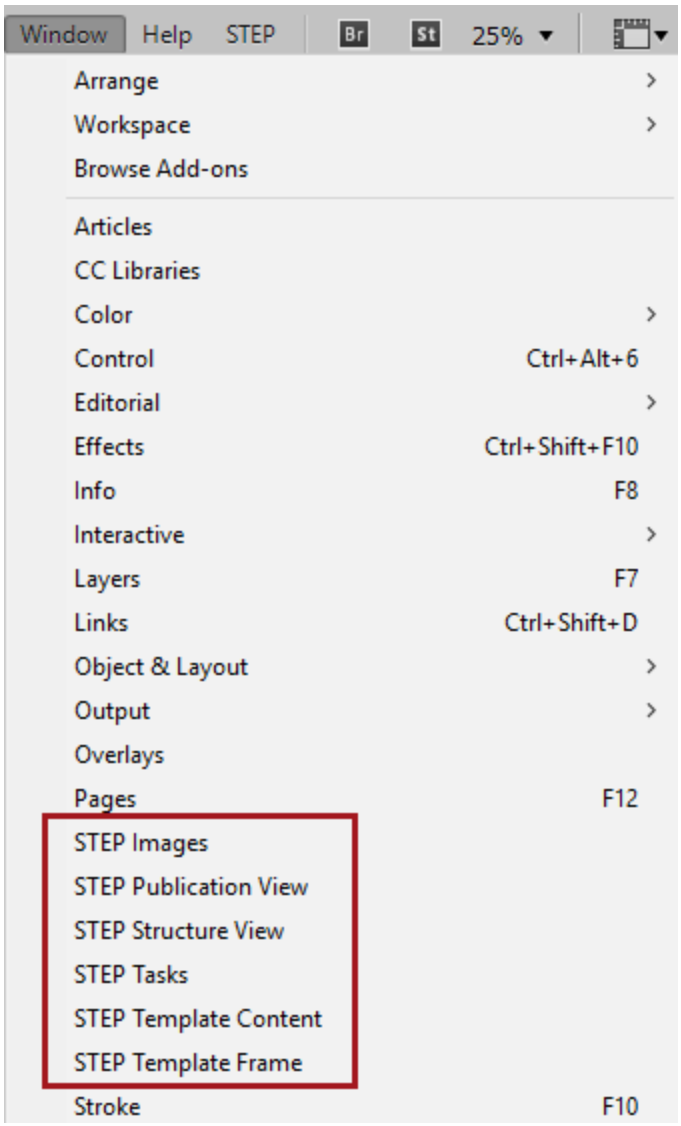
The **STEP Panels** are used for actual mounting of STEP data, including template composition and image mounting. Six InDesign panels (also referred to as **panels** in various locations throughout this guide) are used with STEP Publisher:

- STEP Structure View
- STEP Template Frame
- STEP Template Content
- STEP Images
- STEP Tasks *(Flatplanner only)*
- STEP Publication View (*Flatplanner only)*



The STEP panels are accessed from the **Window** menu in InDesign (accessed from the InDesign application bar across the top of the InDesign interface) and function like any other panels in the InDesign interface. For example, they can be docked, stacked, resized, and collapsed.

Details on each STEP'n'design panel are addressed in the following sections of this documentation.

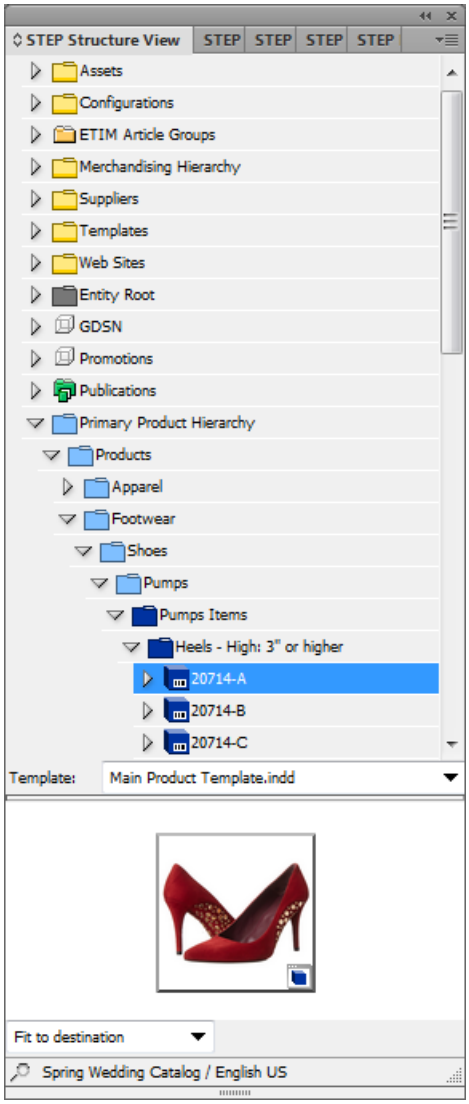

Window
Help
STEP
Br
St
25%
Arrange
Workspace
Browse Add-ons
Articles
CC Libraries
Color
Control Ctrl+Alt+6
Editorial
Effects Ctrl+Shift+F10
Info F8
Interactive
Layers F7
Links Ctrl+Shift+D
Object & Layout
Output
Overlays
Pages F12
STEP Images
STEP Publication View
STEP Structure View
STEP Tasks
STEP Template Content
STEP Template Frame
Stroke F10

STEP Structure View

The **STEP Structure View** InDesign panel (or **panel**, in InDesign terminology) is used primarily to mount product and classification objects to InDesign pages, though asset references and attributes may also be mounted. Other STEP hierarchies may also be accessed if needed (for example, entities).

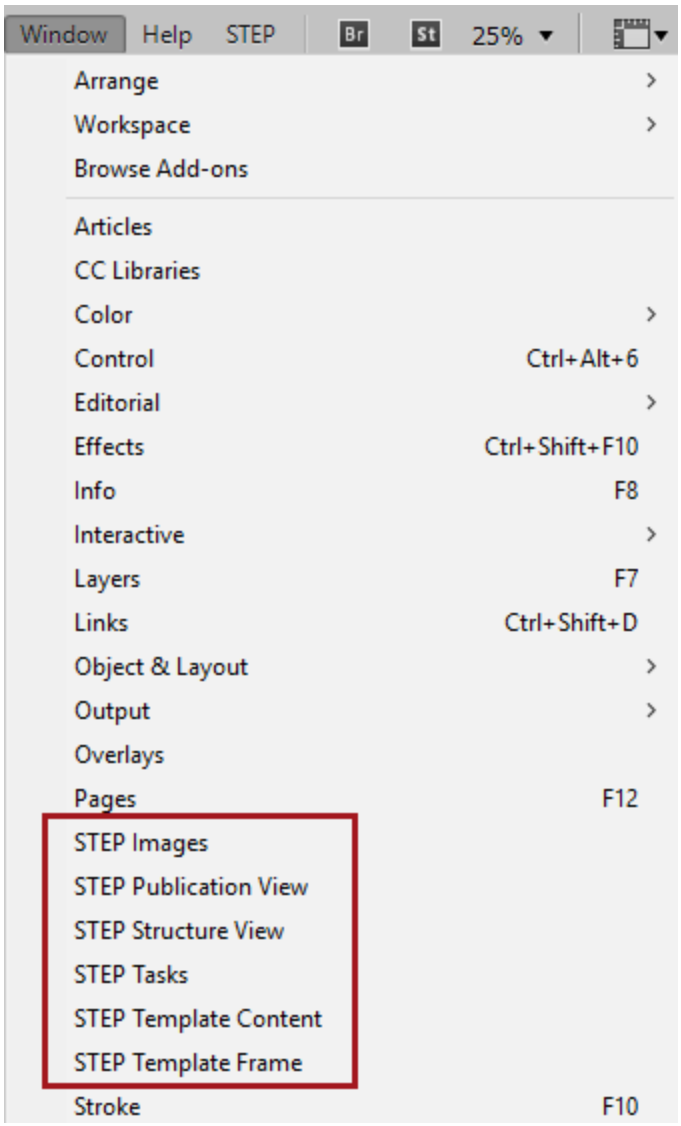
The STEP Structure View is essentially a mirror of the Tree in the workbench. It allows InDesign (DTP) users to access contents of the workbench from within InDesign without having to log in to the workbench.

Most of the work in STEP'n'design is carried out from the STEP Structure View, as products and other objects are dragged from the Structure View tree onto InDesign pages.



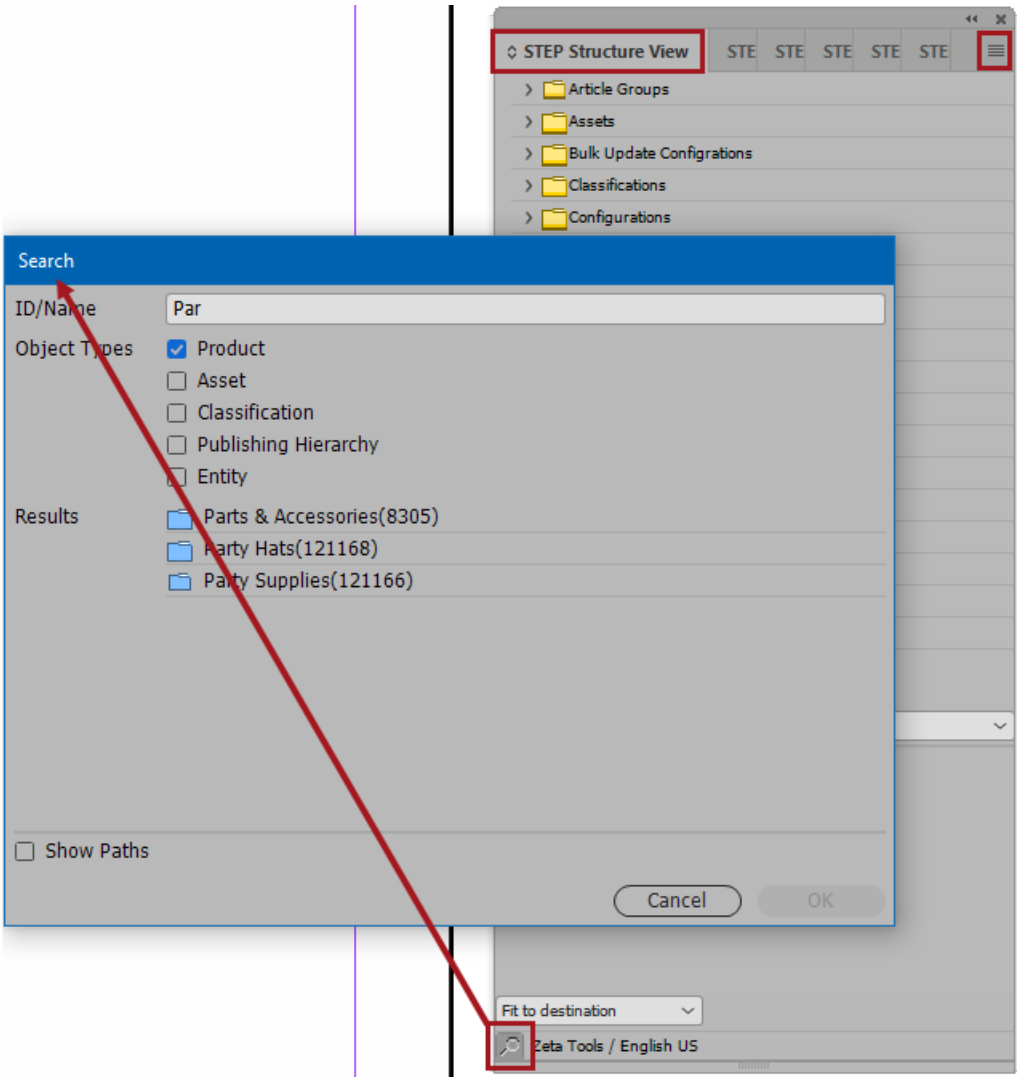
Accessing the STEP Structure View

The STEP Structure View is accessed by navigating to Window > **STEP Structure View** from the InDesign application bar across the top of the InDesign interface.



Navigation and Search in the STEP Structure View

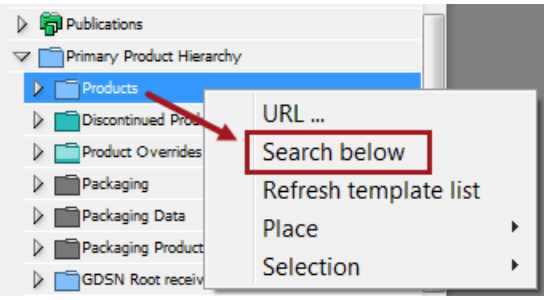
The STEP Structure View can be navigated by browsing or searching. To **browse**, hierarchies may be expanded and collapsed by clicking on the arrow signs to the left of the hierarchy levels. To **search**, click on the magnifying glass search icon in the lower left corner of the panel to display the **Search** dialog. The Search dialog can also be accessed by clicking the **Options** dropdown list in the upper right corner of the panel.



The **Search** dialog enables typeahead and filtered searches in the STEP Structure View. Searches are performed by **Name** or **ID**. Searches may be filtered by one or more of the following object types: Product, Asset, Classification, Publishing hierarchy, and Entity. Search is not enabled unless at least one **Object Types** checkbox is selected in the Search dialog.

Note: A maximum of 20 results can be shown in the Search panel. It is recommended to enter more specific search criteria if looking for an object whose Name or ID begins with commonly used characters.

Searches in the STEP Structure View may also be limited to a specific level (node) of a hierarchy by using the **Search below** option. **Search below** is accessed through a right-click action on the chosen node.

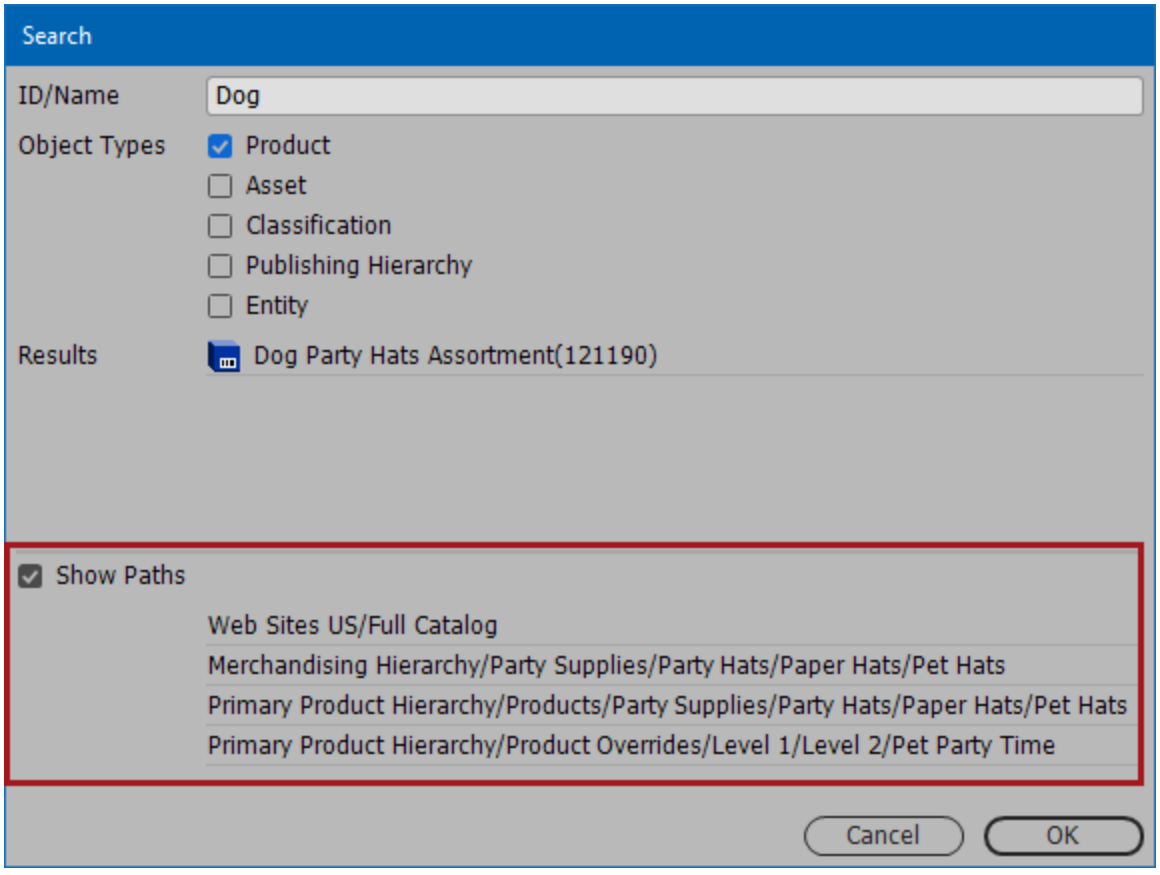


Show Paths

The STEP Structure View panel also supports the listing of full object paths in search results. Full object paths are helpful for locating products in classification structures or when the products are children of product-overrides.

This search is accomplished in two steps, so as not to impact performance. Once the initial search has been conducted, select the object for which you would like to see the path(s). Then, check the **Show Paths** box to conduct a second search, which returns all file paths where the object appears in STEP. Select an object path, then click **OK** to close the Search dialog and be taken directly to the location of the object in the product or classification hierarchy. The 'Show Paths' section of the dialog can be collapsed or expanded as needed.

Note: This functionality is only supported in Adobe InDesign versions CC12 and above.



Configuring Character Minimums for Search

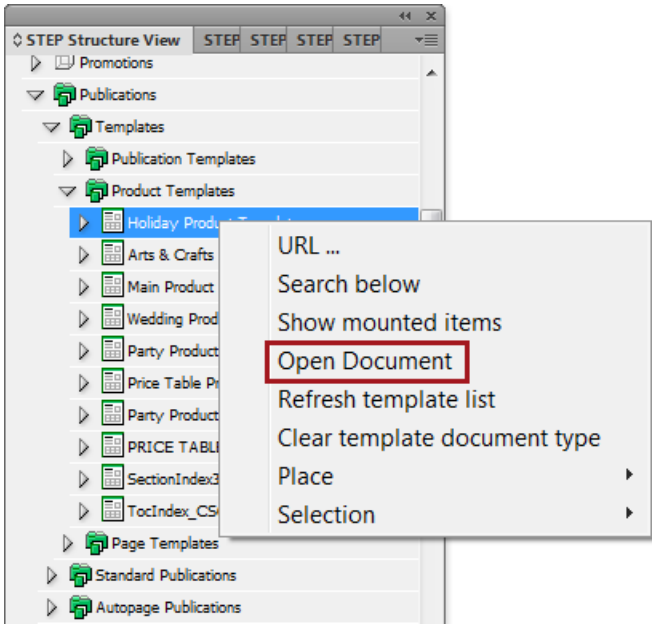
By default, typeahead searches begin when the first character is typed into the search field, and searches using **Search below** have a three-character limit before typeahead search results will populate. To change these settings, the following two configurations can be added to the inSTEPLogOptions.xml file:

```
<dtpDynamicConfig name="typeaheadSearchLimit" value="2" />
<dtpDynamicConfig name="typeaheadSearchBelowLimit" value="2" />
```

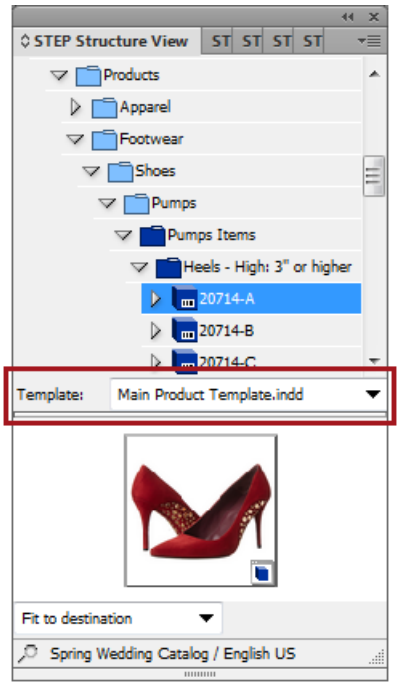
The first configuration sets the number of characters that must be entered before overall search results display. The second configuration serves the same purpose for 'search below' results. For more information on the inSTEPLogOptions.xml file, see the **IDS Logging** topic in the **Administration Portal** documentation.

Additional Features of the STEP Structure View Panel

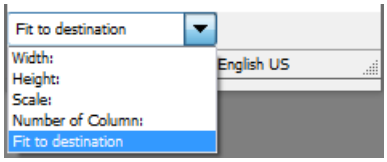
- **Publication Hierarchy**: Templates and actual pages that have been saved back to STEP can be opened for editing from the Publication hierarchy. To open a template or actual page, right-click on the document and select **Open Document** from the menu.



- **Template dropdown list:** When working with local product templates (as opposed to using the Default Template functionality), product templates are selected from this list. This list is populated by the product templates that are saved into the folder specified in the **Template Path** in the STEP **Preferences** menu. See the **Configuring the STEP Preferences Menu** section of the **STEP Publisher** documentation for more information.



- **Image display area:** Appears directly below the Template dropdown list. If the selected object is referenced to a Primary Image, a thumbnail of the image will be displayed in this area. (When an attribute is selected in the Structure View, its value appears.)
- **Scaling dropdown list:** Appears in the lower left corner of the panel. Options in this list define the following settings for the scaling of your element when mounting attributes or asset references:

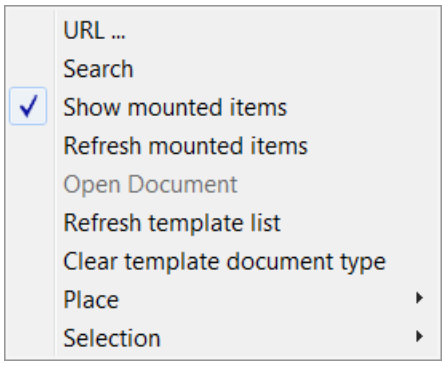


  - **Width:** Sets the width of the text or image frame when dragging an attribute or asset reference directly onto a page (not into an existing frame)
  - **Height:** Sets the height of the text or image frame when dragging an attribute or asset reference directly onto a page (not into an existing frame)
  - **Scale:** Applies to images only, both when creating a frame (dragging directly onto the page) or dragging into an existing frame. Enables you to apply a scaling factor (such as 90%) for an image. The scaling factor will be applied to the image's original (actual) size.
  - **Number of columns:** Makes the text or image frame conform to the width of one or more columns within your active document when dragging an attribute or asset reference directly onto a page (not into an existing frame)
  - **Fit to destination:** Causes an image reference to scale (up or down) to fit the existing frame that it is dragged into

- **Status bar:** Displays the name and version of the publication you are currently working with. For example, 'Spring Wedding Catalog / English US'

Options Menu

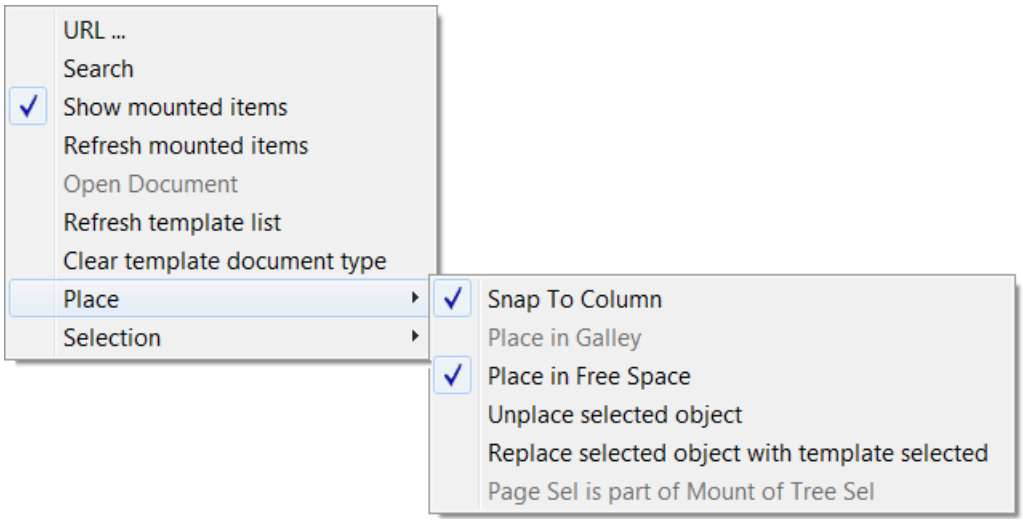
The **Options** menu in the STEP Structure View is accessed by clicking in the dropdown arrow in the upper right corner of the panel. It contains the following commands:



- **URL:** Use this option to enter a STEP URL pointing to a node in STEP. This way you can easily navigate to a specific node without browsing through the Structure View.
- **Search:** Click to access the Search dialog
- **Show mounted items:** Use this option to highlight mounted items in the STEP Structure View tree
- **Refresh mounted items:** Use this option if you have mounted more items (after using the Show mounted items option) and want them to be highlighted as well.
- **Open document:** Use this option to open an InDesign document saved in STEP (you must select the relevant document in the STEP Structure View first).
- **Refresh template list:** Use this option to update the product template list in the STEP Structure View.
- **Clear template document type:** Select this to change a template document to a standard InDesign document. A **Save As** dialog will appear, prompting you to save the document as a new document. The original template document will not be affected unless you save the new document over it with the same name.

Place Options

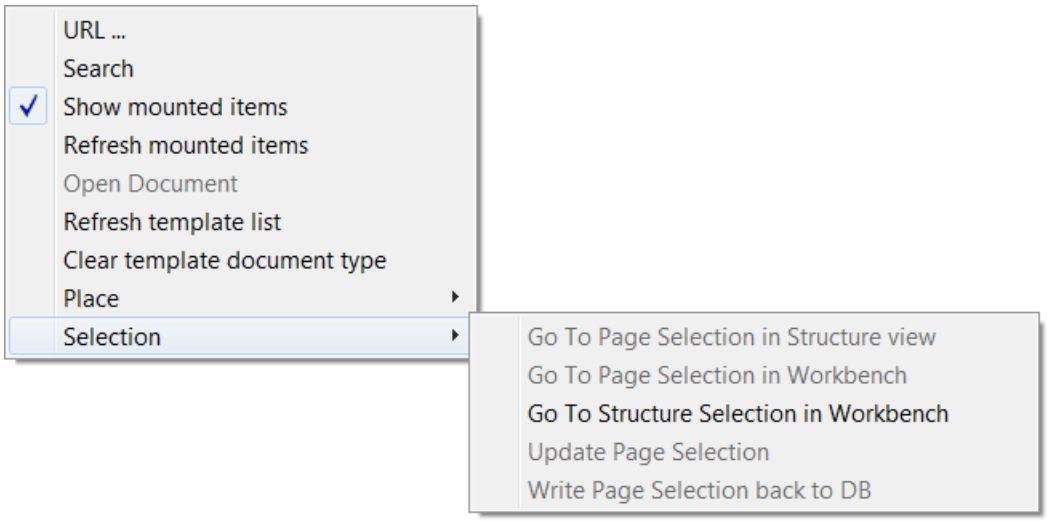
The options available in the **Place** sub-menu enable you to set a range of parameters for the mounting process, as follows. These options are also available in a menu that appears when right-clicking on a selected object in the STEP Structure View panel tree.



- **Snap to Column:** When selected, an item dropped on an InDesign page will align itself with the nearest inside column edge to the left of the object.
- **Place in Galley:** When selected, STEP'n'design will place your galley text in the same frame when mounting products (without using Flatplanner). Option is disabled if **Place in Free Space** is selected.
- **Place in Free Space:** When selected, STEP'n'design will place your object in the first available free space on the page, rather than placing it in the specific location where it is dropped. Option is disabled if **Place in Galley** is selected.
- **Unplace selected object:** Use this option to unmount the object selected in the STEP Structure View tree.
- **Replace selected object with template selected:** Use this option to recompose / reset the mounted object according to the selected product template. Use this option if, for example, you have manually changed the appearance of a mounted object on the page, but then decide to return to the original layout.
- **Page Sel is part of Mount of Tree Sel:** *(Only relevant for Flatplanner)* Use this option if you have items on the page that are not part of the product template (e.g., standalone graphics that do not exist in STEP), but you want them to be included when using a Pickup Page Layout operation in Flatplanner.

Selection Options

The options available in the **Selection** sub-menu enable you to perform a range of operations on the element that you have selected on your InDesign page. These options are also available by right-clicking on a selected image frame or right-clicking within the text frame of a mounted object.



- **Go To Page Selection in Structure view:** When selected, the element you have selected on the page will be shown in the STEP Structure View tree.
- **Go To Page Selection in Workbench:** When selected, the element you have selected on the page will be shown in STEP Workbench (this requires that STEP Workbench is already running on your computer).
- **Go To Structure Selection in Workbench:** When selected, the element you have selected in the STEP Structure View will be shown in STEP Workbench (this requires that STEP Workbench is already running on your computer).
- **Update Page Selection:** When selected, the element you have selected on the page will be updated with the latest value from STEP.
- **Write Page Selection back to DB:** When selected, the value you have selected on your page will be written back to the attribute in STEP (privilege restrictions apply).

STEP Template Panels

The two STEP template panels—**STEP Template Content** and **STEP Template Frame**—are used primarily to create **product templates** in InDesign. These panels (also referred to as *panels* in various locations throughout this guide) are where elements from STEP—including attributes, asset references, and tables—are linked to InDesign pages to build mounted pages in conjunction with **publication templates**. The STEP template panels can also be used to link these same elements to page templates and publication templates, though this is less common.

The two template panels are detailed in the following sections of this documentation—**STEP Template Content** and **STEP Template Frame**.

STEP Template Content

The **STEP Template Content** panel is used primarily when creating **product templates** in InDesign. The STEP Template Content panel is where elements from STEP—including attributes, asset references, and tables—are linked to frames on InDesign pages in order to build mounted pages in conjunction with **publication templates**. The STEP Template Content panel can also be used to link these same elements to page templates and publication templates, though this is less common.

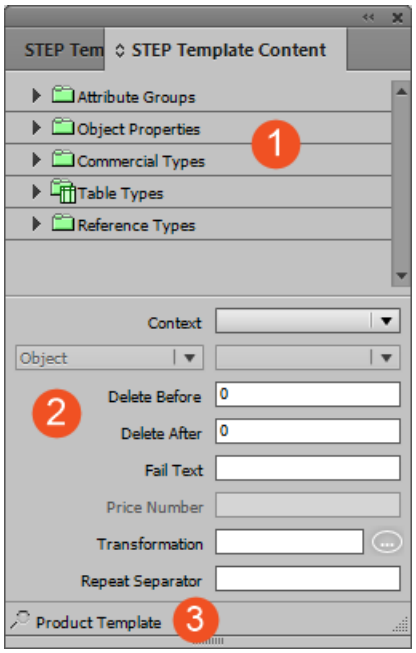
The options on the STEP Template Content panel are used to assign the contents that go *inside* of frames on InDesign templates, as opposed to the **STEP Template Frame** panel, which contains the options that control the behavior of the frames themselves.

The STEP Template Content panel can also be used to apply asset references to entire image frames, though the majority of the settings that control the behavior of the images are applied on the STEP Template Frame panel.

Sections of the STEP Template Content Panel

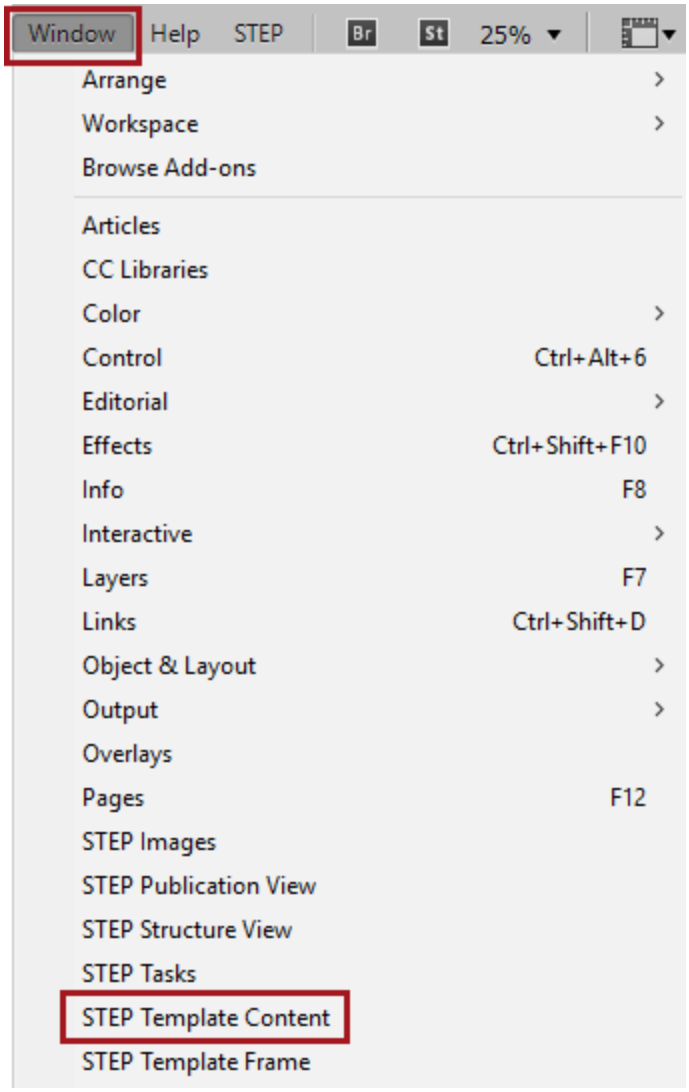
The STEP Template Content panel is composed of three panel divisions.

1. The top panel contains an attribute tree that mirrors many of the contents of the **System Setup** tab in the workbench. It allows desktop publishing (DTP) users to access contents of the workbench from within InDesign without having to log in to the workbench. The available options vary by template type. The below screenshot shows all available folders for product templates. When working with publication templates, only the Attribute Groups and Object Properties folders are available. For page templates, the Attribute Groups, Object Properties, and Reference Types sections are available. (See the 'STEP Template Content Tree' section of this topic below for more information on these folders.)
2. The bottom panel contains the parameters that can be applied to content within the frames on the page. These options are the same regardless of what template type is being worked with.
3. The bottom bar contains the search icon and an indicator to explain what template type is currently being worked with.



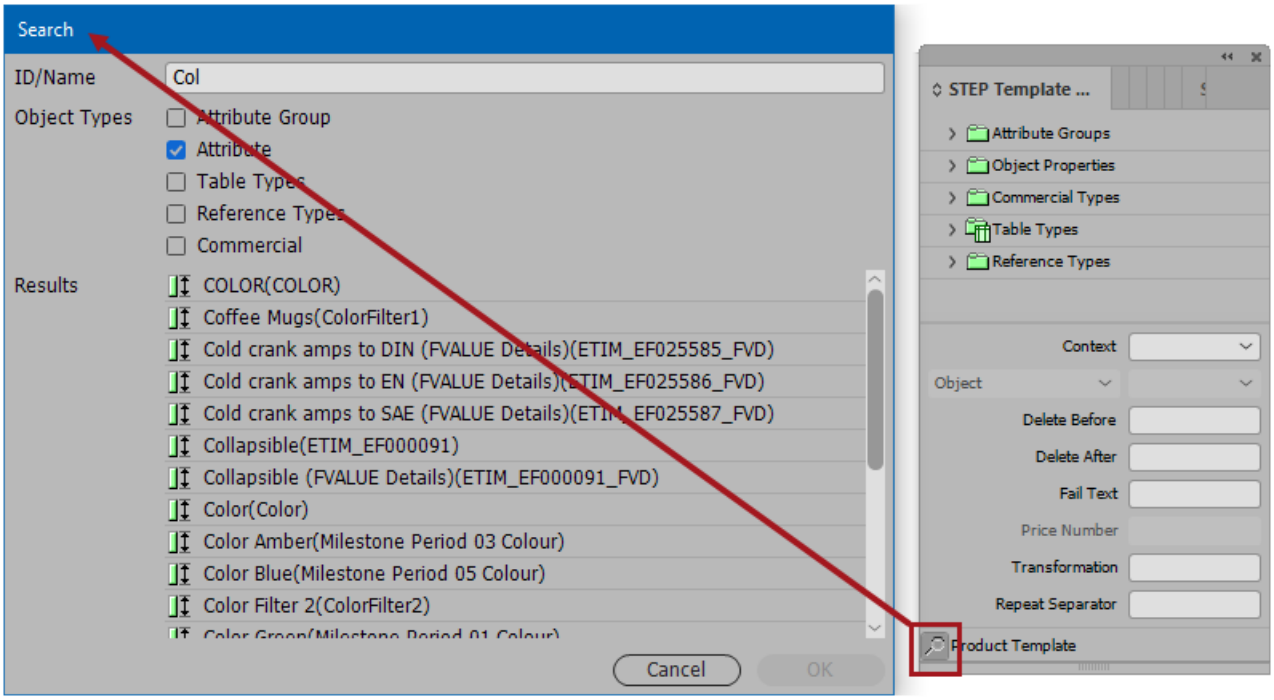
Accessing the STEP Template Content Panel

The STEP Template Content Panel is accessed by navigating to Window > **STEP Template Content**.



Navigation and Search in the STEP Template Content Panel

The STEP Template Content panel can be navigated by browsing or searching. To **browse**, hierarchies may be expanded and collapsed by clicking on the arrow signs to the left of the hierarchy levels. To **search**, click on the magnifying glass search icon in the lower left corner of the panel to display the **Search** dialog.



The **Search** dialog enables typeahead and filtered searches. Searches are performed by **Name** or **ID**. Searches may be filtered by one or more of the following object types: Attribute Group, Attribute, Table Types, Reference Types, and Commercial data lists. Search is not enabled unless at least one **Object Types** checkbox is selected in the Search dialog.

Note: A maximum of 20 results can be shown in the Search panel. It is recommended to enter more specific search criteria if looking for an object whose Name or ID begins with commonly used characters.

Configuring Character Minimums for Search

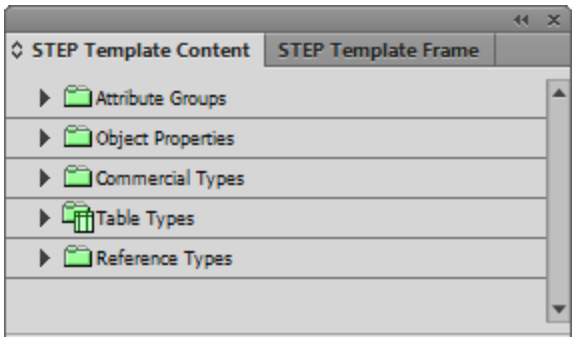
By default, typeahead searches begin when the first character is typed into the search field. To change this setting, the following configuration can be added to the inSTEPLogOptions.xml file:

```
<dtpDynamicConfig name="typeaheadSearchLimit" value="2" />
```

This configuration sets the number of characters that must be entered before search results display. For more information on the inSTEPLogOptions.xml file, see the **IDS Logging** topic in the **Administration Portal** documentation.

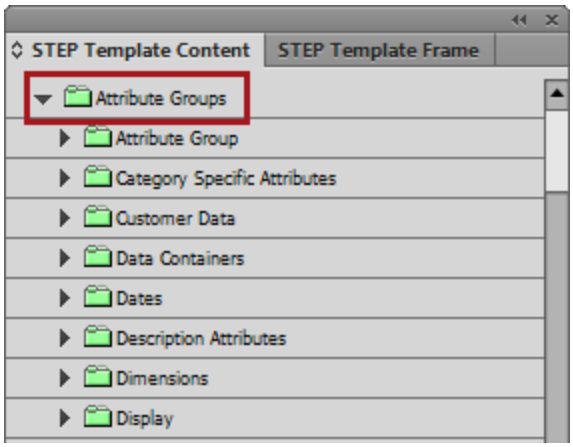
STEP Template Content Panel Tree

The tree in the top panel of the STEP Template Content panel mirrors many of the contents of the **System Setup** tab in the workbench, but also has additional entries that are specifically for template creation.

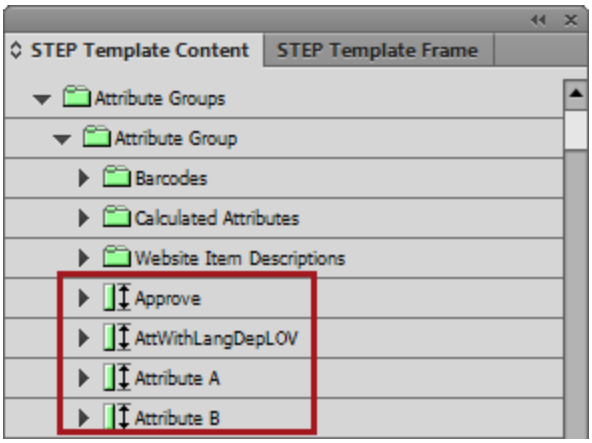


Descriptions of each folder and its contents are as follows:

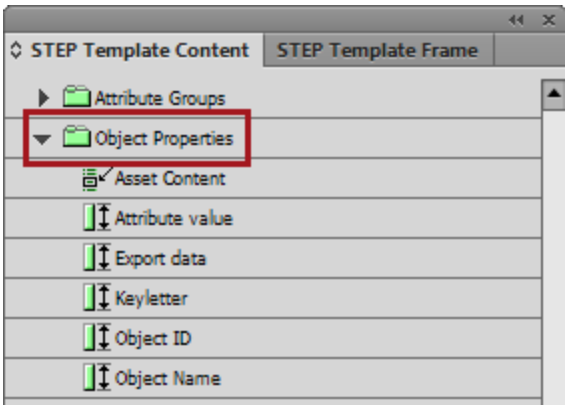
1. **Attribute Groups:** Expand the top-level Attribute Groups folder to see all attribute groups in STEP.



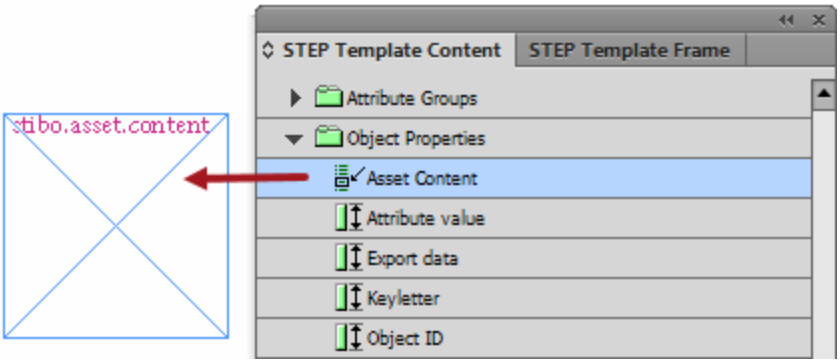
   - Expand the attribute folders to access individual attributes.



2. **Object Properties:** This folder contains non-attribute elements that can be mounted on InDesign pages. Each option is described in the bullet list below.

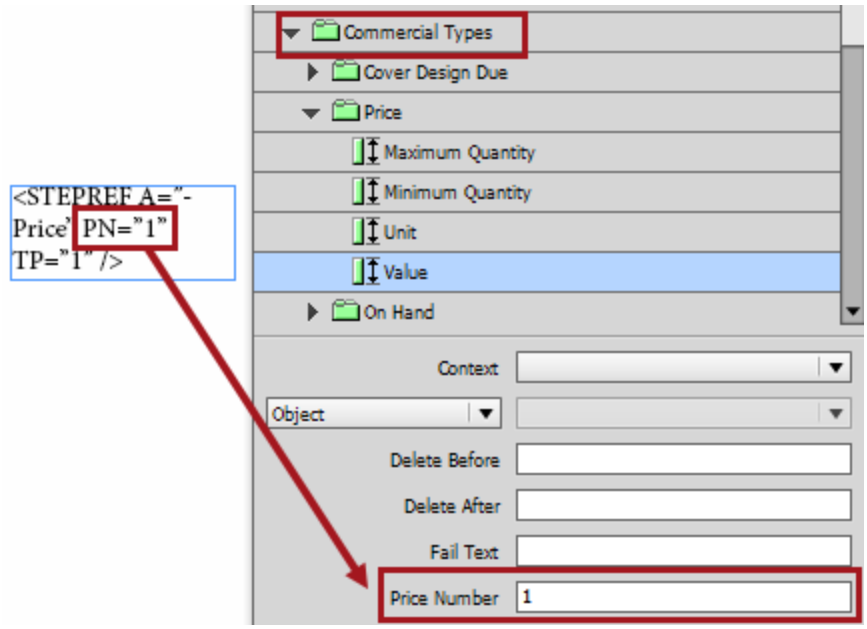


- **Asset Content:** Typically used in conjunction with the 'Data Source' setting (on the STEP Template Frame panel) to mount referenced image assets. Some examples of when this tag (stibo.asset.content) is used include: an image frame that will display multiple images from a multi-valued asset reference; an image frame that is intended to tile across the page when displaying multiple images; or for image frames that are grouped with text frames to mount image metadata captions. For more information, see the **Sequencing Images in InDesign** topic.

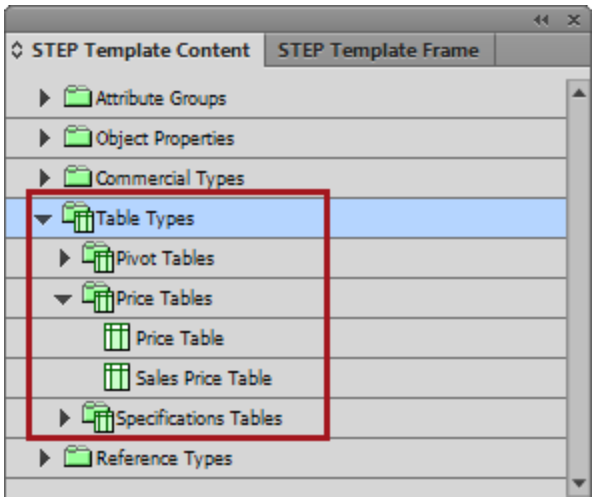


- **Attribute value:** Used when mounting attribute groups. See the **Mounting Multi-Valued Attributes and Attribute Groups** topic for more information.
- **Export data:** Used on product templates in AutoPage publications to include index mounting as part of the autopagination process.
- **Keyletter:** Used to create Galley page templates. See the **Galley Templates** section of the **Flatplanner** documentation for more information.
- **Object ID:** Used to display the STEP ID of the object being mounted.
- **Object Name:** Used to display the STEP Name of the object being mounted.

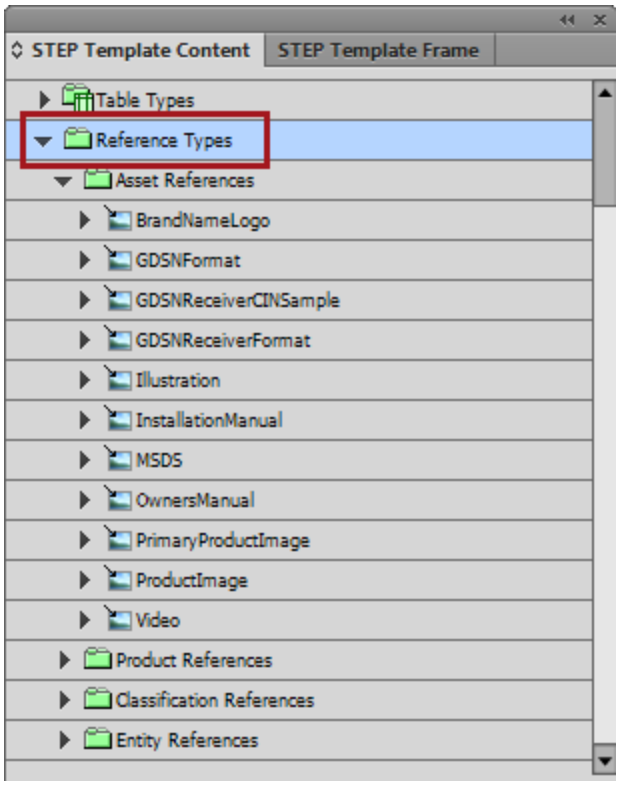
3. **Commercial Types:** Used to mount the following information from a selected commercial terms list: Maximum Quantity, Minimum Quantity, Unit, and Value. Note that a Price Number must also be designated in the tag when mounting commercial data. For more information, see the **Mounting Commercial Data** topic.



4. **Table Types:** Used to add tags to text frames on product templates that will mount tables of the selected table type.



5. **Reference Types:** Most commonly used with image frames to mount asset references, though tags for other reference types can also be placed onto templates from product references, classification references, and entity references.



STEP Template Content Panel Parameters

The parameters available on the lower half of the STEP Template Content panel are as follows:

- **Context:** Use this option to mount textual content from a specific context in STEP. If left empty (which is the default, and most common setting), the system will mount data from the selected publication version onto the page instead. One example for the use of this setting would be if your publication version is English but there are one-off instances in your document where you need to mount the same attribute twice on the page but in a different language, e.g., a product name should appear on the same page in both English and French, even though the version for the entire publication pulls from an English context.
- **Object:** This dropdown contains three options—'Asset Reference,' 'Product Reference,' and 'Template section object'. The default selection is Object. When Asset Reference or Product Reference is selected, the dropdown field to the right is activated, enabling you to select the relevant asset reference or product reference from the list.
- **Delete Before + Delete After:** If a mounted attribute is empty, STEP'n'design can be configured to remove a number of characters either before or after the location where the attribute should have been placed. This is especially useful if there are characters that should not be on the page when the mounted attribute is empty. For example: You want your page to display 'Special Offer: [PromoPrice] this week only'. If your database does not contain a value in the 'PromoPrice' attribute for the product you are mounting, you do not want these text strings before or after the attribute.

  By using the **Delete Before** and **Delete After** functions, you can eradicate them.

For this example, setting a **Delete Before** value of 14 will delete the 14 characters of the 'Special Offer:' string. Setting a **Delete After** value of 15 will delete the 15 characters of the 'this week only' string.

> **Note:** In most cases you do not need to count the exact number of characters to delete, as delete before / after will not delete another attribute reference. In addition, these delete options only take effect if there is no value for the attribute.

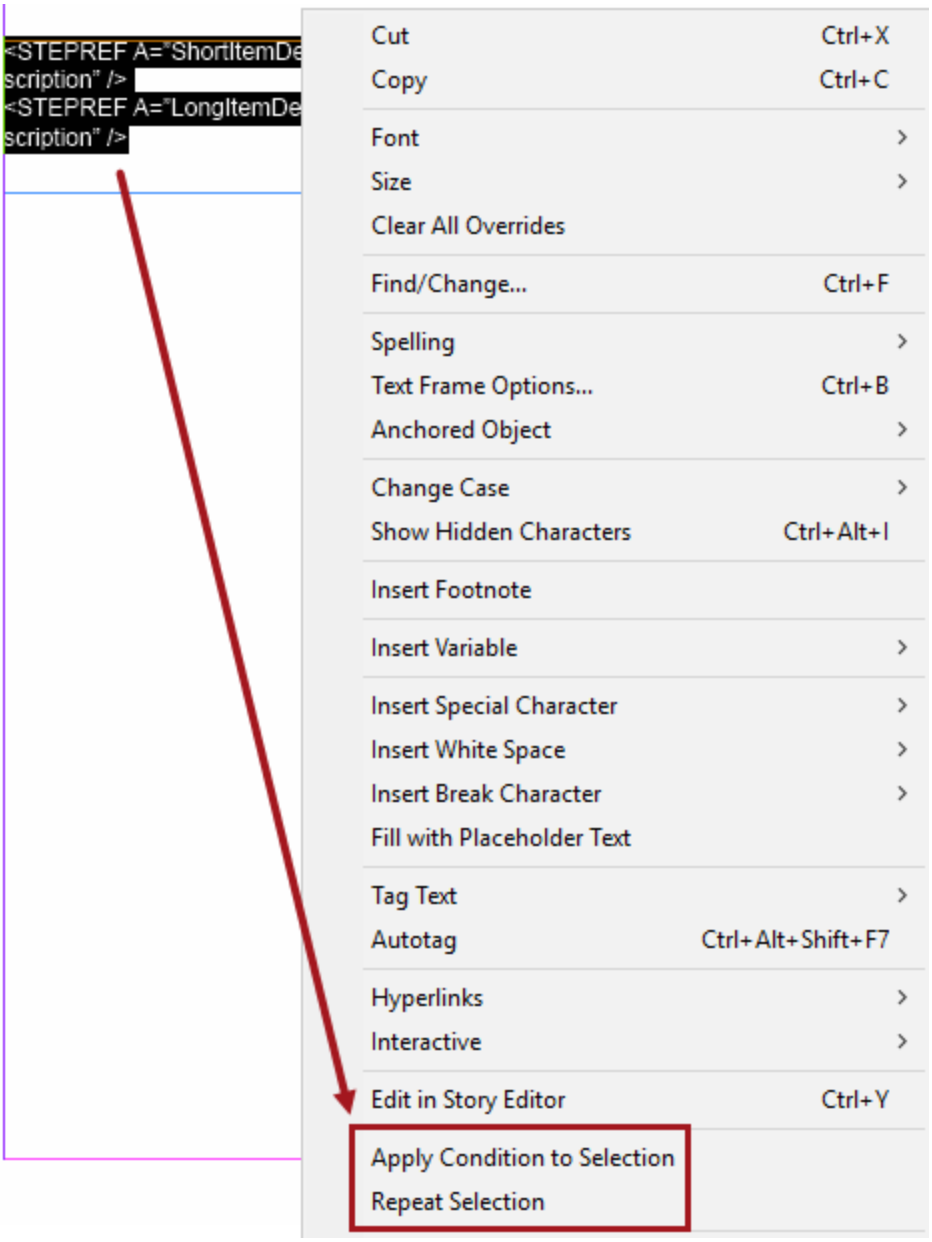
These options should also be used even if there is no free text before or after a value but you need the frame to disappear if there is no content. Using a value of DB = 1 or DA = 1 will remove any 'stray' XML tagging that appears on the page if there is no content in STEP and ensures that the text frame itself will disappear when Delete No Content is applied to the entire frame.

- **Fail Text:** If an attribute does not contain a value for the product you are mounting, you can use this field to insert text that should appear on the page instead of a blank space or frame. This field is typically used for text replacement strings such as 'Not Applicable', 'N/A', 'Call for details', 'None', etc. A Fail Text value can also be a blank space or an invisible character. If an attribute is empty and does not have a Fail Text configured, the attribute will appear on the page as a STEPXML tag (unless DB or DA values also have been configured; see above for more information).
- **Price Number**: Used to designate which price break (price number) should be mounted from the values of a commercial terms list.
- **Transformation:** Used to apply an attribute transformation to an attribute when being mounted onto the InDesign page. The STEP **Name** (not ID) of the transformation must be typed into this field for it to take effect. The name of the transformation is case sensitive. The most common types of attribute transformations used are those that transform text values into images (for example, multiple image tags can be embedded in a text-based attribute and rendered in InDesign; see an example in the **Attribute Transformations in STEP Publisher** documentation).
- **Repeat Separator:**This option is used in conjunction with the repeat area (STEPREPEAT) function as well as multi-value attributes. If not set for a multi-value, then the **multisep** tag (Character Tags under System Setup > Tags) from the database is used.
  The Repeat Separator value is a string, which is set in by STEP'n'design every time a 'Repeat Selection' operation is performed. Often, the repeat separator is used to put in a new line character between the individual attribute rows. In that case, the Repeat Separator is the InDesign character for new line \n.

Available Right-Click Options Inside Text Frames

Two right-click options are available for highlighted text inside of a text frame—**Apply Condition to Selection** and **Repeat Selection**.

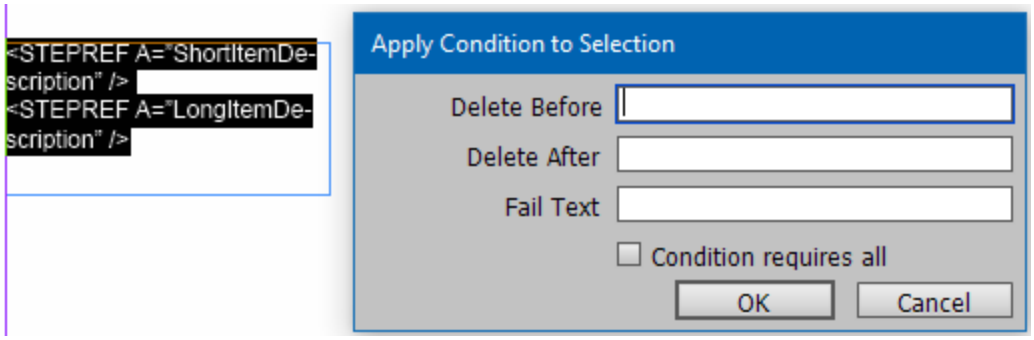
Though the STEP Template Content is not used to access these options, they are detailed in this topic because they involve the setting of parameters on content inside of frames.



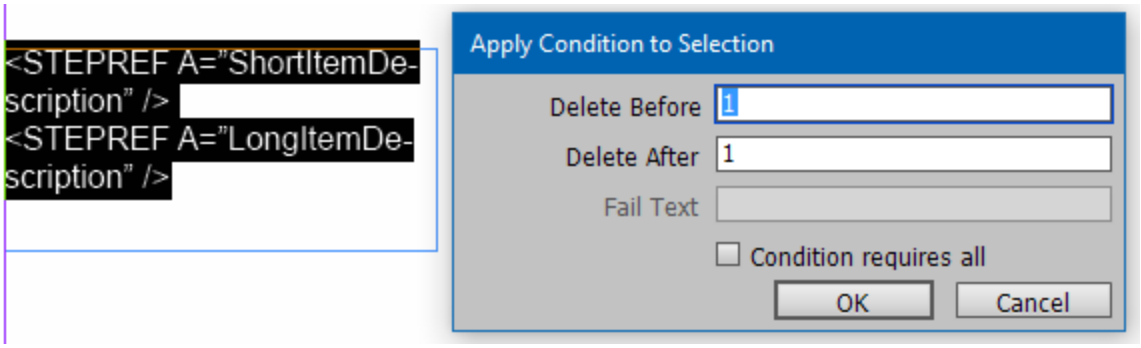
Apply Condition to Selection

This option becomes available when at least one STEPXML tag is highlighted inside a text frame by using the InDesign **Text** tool. Once highlighted, you can apply parameters such as **Delete Before / Delete After** and **Fail Text** to the group of attributes at one time. Once the attribute tags are selected and the parameters chosen, click **Apply Condition to Selection** to apply the selections to all the attributes at once.

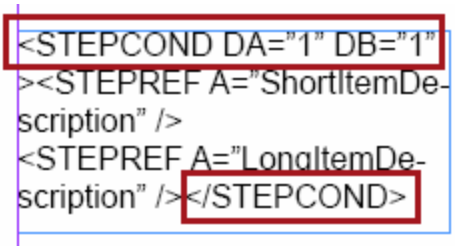
When the tags are selected, right-click to display the **Apply Condition to Selection** dialog.



In the following screenshot, several tags have been selected and '1' has been entered for Delete Before and Delete After. If a value is entered for Delete Before or Delete After, the Fail Text field will be deactivated, as the two options are mutually exclusive. Likewise, if content is provided for the Fail Text field, then Delete Before and Delete After will be deactivated. If fail text appears when an attribute value is empty, there is nothing to delete.



Click OK to see that as STEPCOND tag is now added to surround the grouping of attributes to which a DA and DB setting of 1 should be applied:



Delete Before, Delete After, and Fail Text

Configuring these options is identical to configuring them on the STEP Template Content panel for text. See the STEP Template Content Panel Parameters section of this topic above for more information.

Condition requires all

Check this box if you need everything in the frame to mount. This essentially means that the mounting of content inside the frame is 'all or nothing.' If the value of one of the attributes is empty, then nothing will mount, and the entire frame will be removed. Ticking this box will add the 'RA' (Requires All) abbreviation inside the STEPCOND tag.

```
<STEPCOND DA="1" DB="1"
RA="1" ><STEPCOND
DA="1" DB="1" ><STEPREF
A="ShortItemDescription" />
<STEPREF A="LongItemDe-
scription" /></STEPCOND></
STEPCOND>
```

Repeat Selection

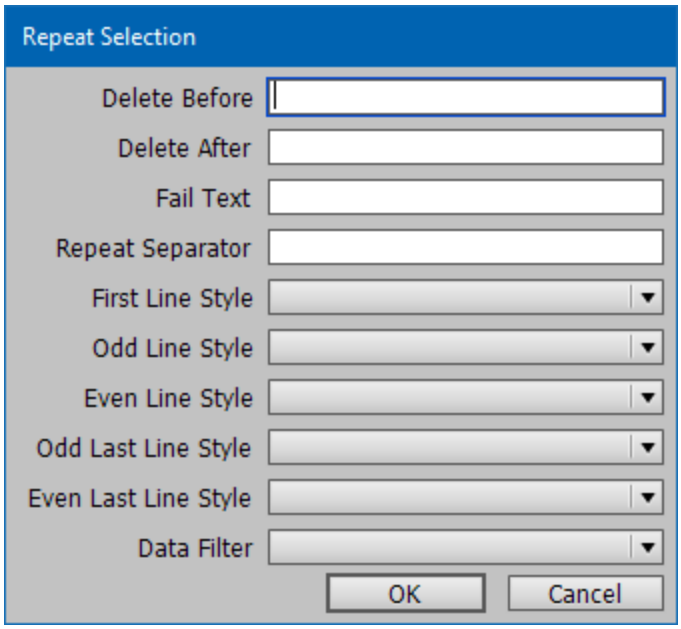
If attributes, asset references, tables, or any other values from child objects of a parent must be mounted, the repeat function **STEPREPEAT** is used.

When a product is mounted in STEP Publisher, only attributes from the mounted object itself appear on the page. In instances of product families, for example, STEPREPEAT is used to call out information that lives on child products of the family.

The repeat function takes effect in the cases where you are mounting a product family with one or more child products. Using the repeat function, you can make STEP Publisher place specific attributes of the child products into the page in repeat mode, which means that if you have children within the product family, you can have the values for all children mounted as you mount the product family level. Effectively, this function can enable you to display data for multiple products in a tabular way, without having to create a table in STEP.

As an alternative to creating a table in STEP, you can make a range of attributes repeat for any sub-products to the product being mounted. This will enable you to create a simple, table-like structure on your InDesign page where every sub-product has its own row.

Note: A more complex presentation is to build a STEP table, as this provides more complex formatting options.

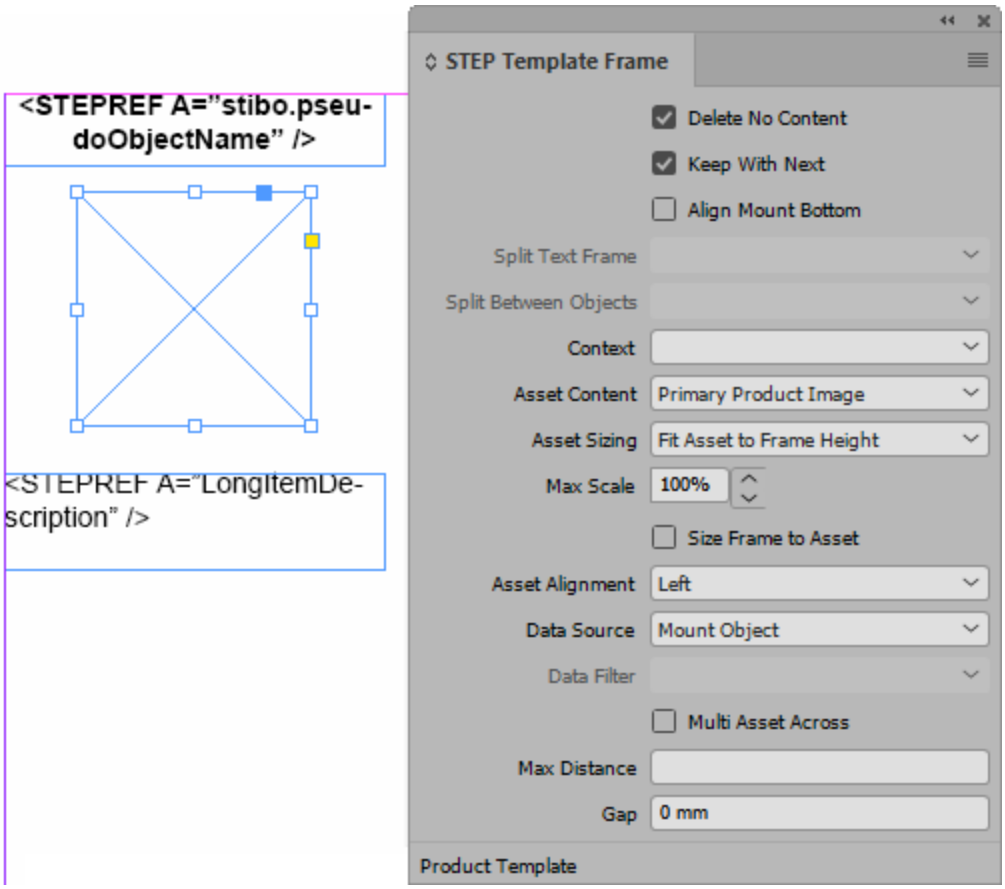


For more information about the repeat selection option, see the **Using the Repeat Function for Subproducts** topic.

STEP Template Frame

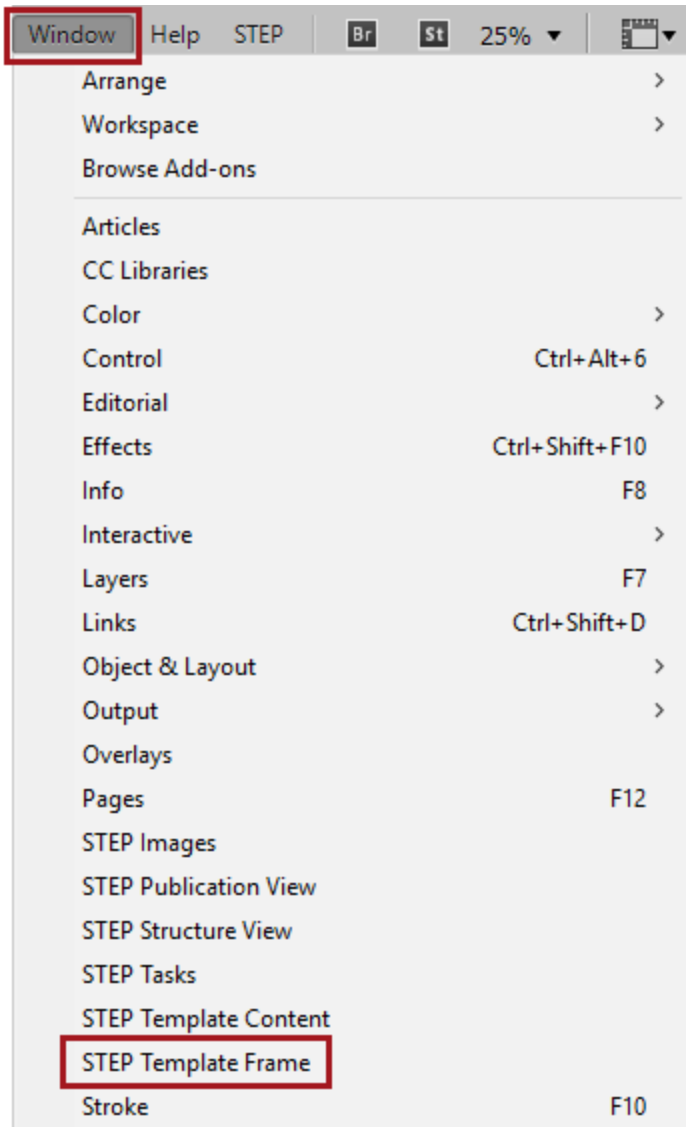
The **STEP Template Frame** panel is primarily used when creating **product templates** in InDesign. This panel is where settings that apply to entire frames on templates are configured, such as settings to adjust image scaling and text frame height. The STEP Template Frame panel also has limited applications for publication templates and InDesign-created page templates, though these uses are less common.

The STEP Template Frame panel is blank until a frame is selected on a template. The options change depending on what template type is selected under the STEP > **Template Type** menu and what type of frame is selected—text, asset, or grouped.



Accessing the STEP Template Frame Panel

The STEP Template Frame panel is accessed by navigating to Window > **STEP Template Frame** from the InDesign application bar across the top of the InDesign interface.



STEP Template Frame Panel Parameters

The parameters available for options change depending on what template type is selected under the STEP > **Template Type** menu and what type of frame is selected—text, asset, or grouped.

A range of parameters are set on frames on product templates, page templates, and publication templates from the lower half of the **STEP Template Frame** panel. These parameters control the behavior of elements on the page when pages are mounted, such as the scaling of text or images to match the size of their frames; allowing a text box or table to split if it reaches the bottom of a column or a page; whether to delete a frame if there is no content in STEP to populate it; and many more.

STEP Template Frame panel parameters differ depending on the type of *template* being configured and the type of *frame* being configured. The following sections of this topic list these parameters and describe their functions.

Parameters Available for Product Templates

Parameters for product templates in the STEP Template Frame panel are different depending on what type of frame is being configured on the page: text frame, image frame, or grouped frame. As the list of parameters available for each is extensive, they are covered separately in the following **STEP Publisher** topics:

- Text Frame Parameters
- Image Frame Parameters
- Grouped Frame Parameters

Parameters Available for Page Templates

Only relevant when using the Flatplanner component, and primarily used for Galley templates. For more information, see the STEP Template Frame panel topics mentioned above in the 'Parameters Available for Product Templates' section and the **Galley Templates** section of the **Flatplanner** documentation.

Parameters Available for Publication Templates

Attributes and other frames may be added to publication templates that are intended for use with the **Flatplanner** or **AutoPage** publishing components.

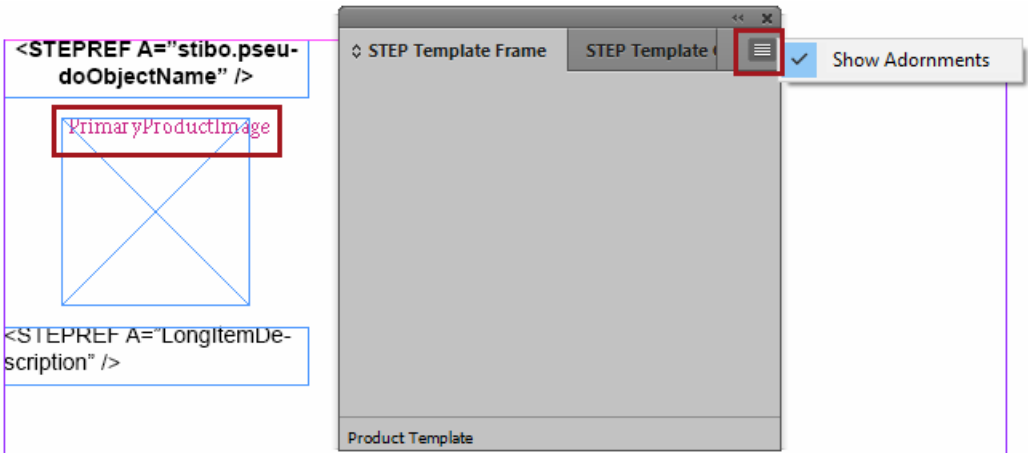
Elements added to publication templates from the STEP Template Frame panel are typically text frames that either display description attribute values (such as page headers) or **Product Continuation Notes** for **AutoPage** publications. Image frames may also be added to display logos or background images, though this is less common.

Attribute text frames and image reference frames are configured on publication templates the same way that they are configured for product templates.

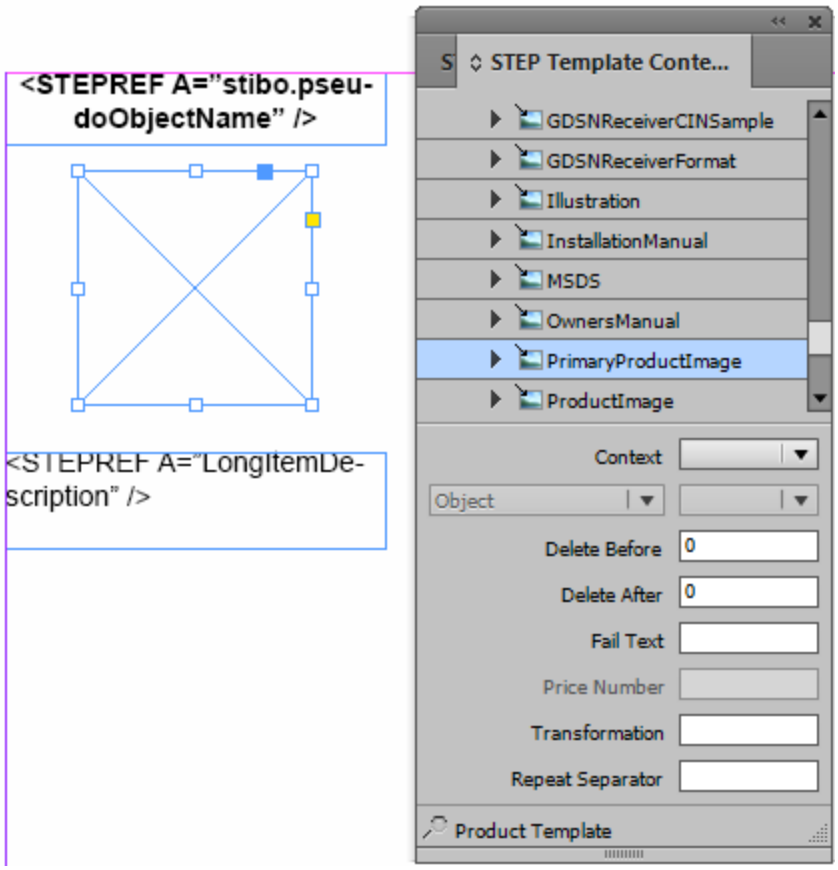
For more information about Product Continuation Notes on publication templates for AutoPage publications, see the **AutoPage Pagination Rule Actions** topic in the **AutoPage** documentation.

Options Menu

The **Options** menu in the STEP Template Frame panel (arrow in upper right corner) contains one option, **Show Adornments**. Use this option to display the STEP ID of the asset reference type assigned to each image frame on the product template.

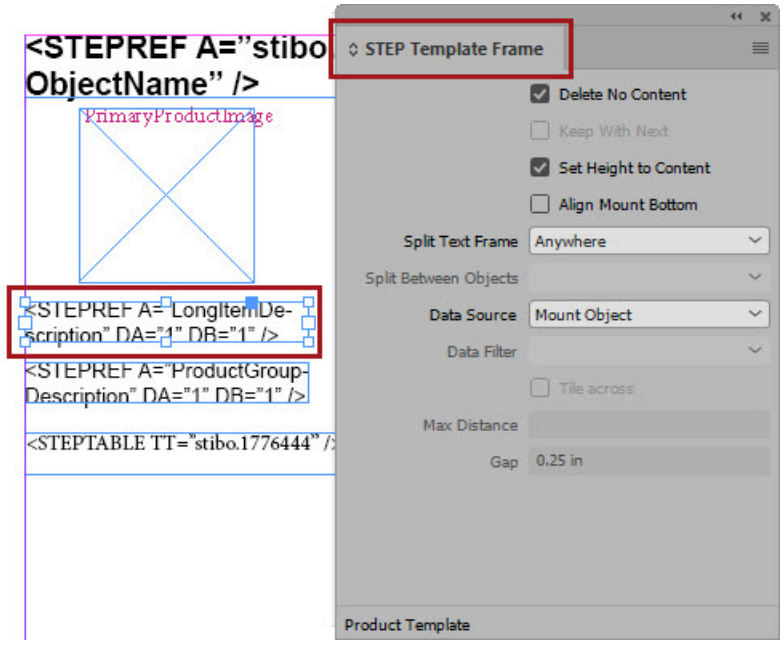


When adornments are not displayed, the asset reference type assigned to a frame can be determined by opening the **STEP Template Content** panel and selecting the frame. The attribute tree will 'jump' to the assigned asset reference type. For more information on the STEP Template Content panel, see the **STEP Template Content** section of this documentation.



Text Frame Parameters

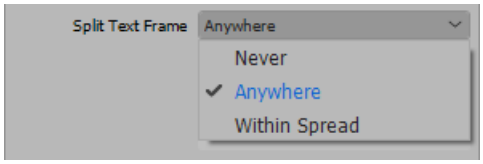
This topic explains the individual parameters available when configuring text frames using the **STEP Template Frame** panel in InDesign.



- **Delete No Content:** This option can be best understood as 'Delete IF No Content.' Check this box to ensure that empty frames do not mount on pages if there is no content in STEP available to populate the text of the attribute(s) linked to the text frames. This setting ignores static text within the frame. If this box is left unchecked, the frame will be mounted, either as empty or with the XML references appearing, depending on the settings placed in 'Delete Before' and 'Delete After' (details on these settings are explained further down in this list).
- **Keep With Next:** When this option is selected, the selected frame will always remain with the frame directly below it. This setting prevents situations where, for example, the name of a product would be separated from its image if the product mounts at the bottom of the page, and there is only enough room to mount the frame containing the product name. With this box checked, both frames will mount on the following page in order to keep the two frames together. A frame with **Keep With Next** set cannot have a **Split** setting of **Anywhere** or **Within Spread** and vice versa.
- **Set Height to Content:** Check this box if you want STEP'n'design to automatically adjust the height of your text frame if the text or table content is too lengthy to fit in the frame at its original size.
- **Align mount bottom:** Select this to ensure that a text frame will always mount at the bottom of the page. In Flatplanner, the frame will align to the bottom of the Flatplan frame. If more than one frame is designated to align mount bottom, the lowermost frame will align to the bottom and the other frame(s) will mount above it, separated by the same gap amount as on the product template.

- **Split Text Frame:** This option applies to both individual and repeating (tiling) text frames. Three split options are available: **Never**, **Anywhere**, and **Within Spread**.

  Note: The Split Text frame parameter is not available for grouped frames.

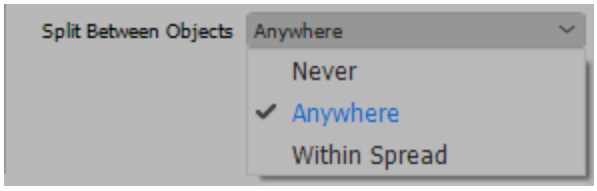
  For **individual** text frames, these settings control the behavior of frames that are too lengthy to fit entirely in a column or on a page. This is typically caused by frames that contain lengthy tables, though very large blocks of text can also cause tall frames. The options behave as follows:

  - Select **Never** to prevent the text box from ever splitting across a column or a page.
  - Select **Anywhere** to allow the text box to split across columns and pages even if the split results in the creation of a new spread. I.e., the text box will be permitted to split from a right-hand page onto a left-hand page.
  - Select **Within Spread** to limit the split to within a spread only, i.e., only permit the text frame to split from a left-hand page to a right-hand page, disabling the ability to create a new spread.

  Note: A text frame with a Split Text Frame setting of **Anywhere** or **Within Spread** cannot have **Keep With Next** set on the frame, and vice versa.

- **Split Between Objects:** This parameter applies to **repeating** frames and is activated when a Data Source other than 'Current Object' is selected; e.g., either Mount Children or a reference type (asset, product, classification, or entity). The split options are the same as those for Split Text Frame: **Never**, **Anywhere**, and **Within Spread**.

  Note: Unlike the Split Text frame parameter, the Split Between Objects parameter **is** available for grouped frames.

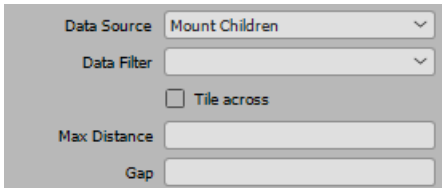
  These settings control the behavior of frames that have tiled to a point where they no longer can fit entirely in a column or on a page. This would be caused in instances where, for example, textual information from numerous child objects are mounted in repeated frames, and there are too many to fit in a column or page. The options behave as follows:

- Select **Never** to prevent the series of repeating frames from splitting across a column or page if there are too many frames to fit in one column or on one page.
- Select **Anywhere** to allow the series of repeated frames to split across a column or onto another page, even if the split continues from a right-hand page to a left-hand page, creating a new spread.
- Checking **Within Spread** to limit the repeated frames to continue from a left-hand page to a right-hand page only, disabling the ability to create a new spread.

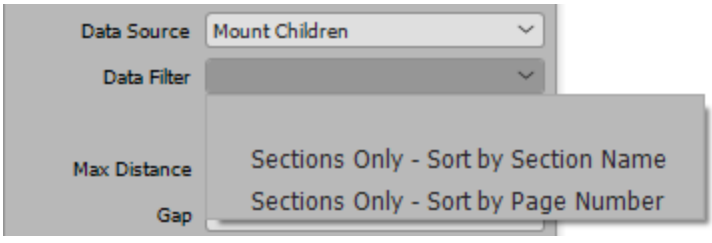
Because the **Split Text Frame** and **Split Between Objects** settings work in tandem with each other, certain combinations of split settings are disabled. For example, you cannot have 'Split Text Frame' set to 'Anywhere' and 'Split Between Objects' set to 'Never.' To further ensure that the settings work together, choosing a selection on one split option may automatically update the other. For example:

- If you set 'Split Text Frame' to 'Within Spread' and the current 'Split Between Objects' setting is 'Never,' the setting for 'Split Between Objects' will be automatically changed to 'Within Spread.'
- If you set 'Split Text Frame' to 'Anywhere' and the current 'Split Between Objects' setting is 'Never' or 'Within Spread,' the setting for 'Split Between Objects' will be automatically changed to 'Anywhere.'

- **Data source:** This controls whether the frame should mount content from the object that is being mounted (**Mount Object**; most common), from children of the mounted object (**Mount Children**), or from an asset or product linked to the mounted object by a reference type. By default, the data source is **Mount Object**, which extracts values from the mounted object only.
  Select **Mount Children** or an **asset / product reference type** when the text frame is intended to repeat on the page. The text frame repeats in instances where information is available from multiple child objects or from multiple referenced products or assets. When Mount Children or an asset / product reference type is selected, the following options are activated in the STEP Template Frame panel: **Tile across**, **Max Distance**, and **Gap**. If Mount Children is selected, the **Data Filter** option is also activated.



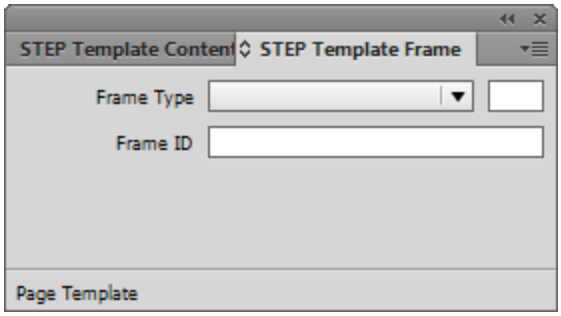
- **Data Filter:** Only activated when Data Source is 'Mount Children.' Used when mounting publication or section objects to pull information (such as metadata attribute values or section names) from child sections / subsections. Available options are **Sections Only - Sort by Section Name** and **Sections Only - Sort by Page Number**. This functionality is typically used in AutoPage publications to create tables of contents / section indexes. See the **Creating a Table of Contents Product Template** topic for more information.



- **Tile across:** Check this box if repeated frames should be tiled horizontally across the page instead of stacking vertically beneath one another.
- **Max Distance:** The maximum distance that horizontally tiled frames should repeat across the page (L-R) before stopping and wrapping back around to begin a new row of repeated frames underneath.
- **Gap:** The amount of space to place between repeated frames when tiled.

Text Frame Parameters for InDesign-created Page Templates

The below screenshot shows the available text frame parameters for InDesign-created page templates, which are only applicable for Flatplanner publications and typically are **Galley** templates. The options are **Frame Type** and **Frame ID**.



For information on how to use these options, see the **Galley Templates** section of the **Flatplanner** documentation.

Text Frame Parameters for Publication Templates

A 'Frame Type' dropdown list is available for text frames when working with publication templates. These two options (Product Continuation Note Before Split and Product Continuation Note After Split) only apply to publication templates that will be used in AutoPage publications. See **AutoPage Pagination Rule Actions** in the **AutoPage** documentation for more information.

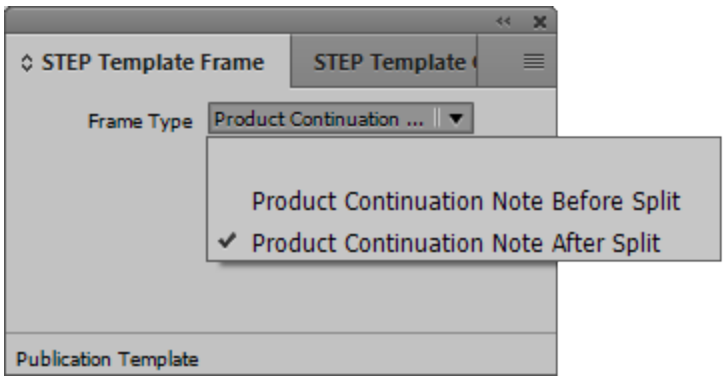
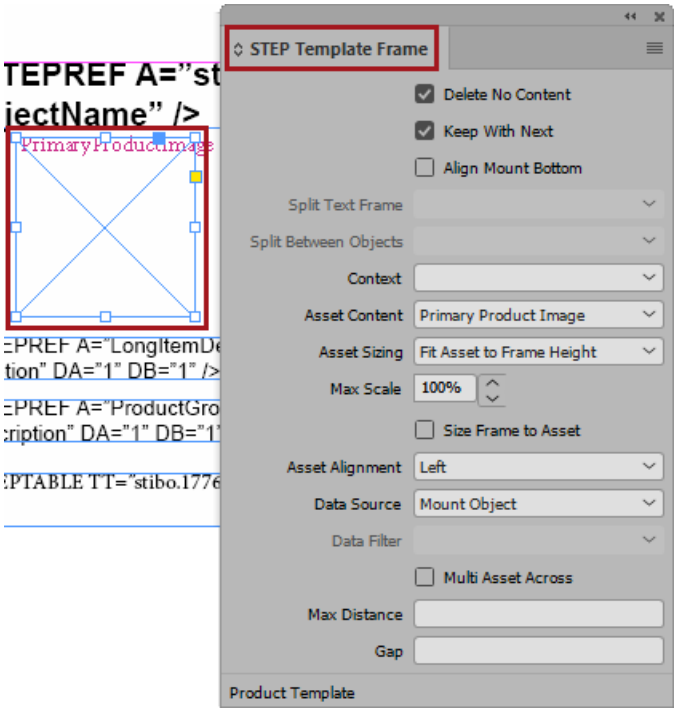


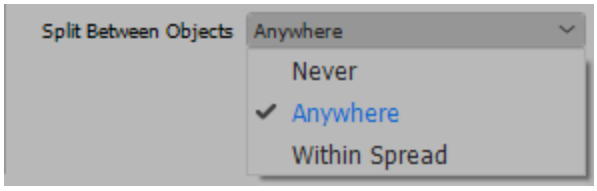
Image Frame Parameters

Below is a description of the individual parameters available when configuring image frames on product templates using the **STEP Template Frame** panel in InDesign. For information on the parameters available for page templates and publication templates, see the bottom sections of this topic ('Image Frame Parameters for InDesign-created Page Templates' and 'Image Frame Parameters for Publication Templates').



- **Delete No Content:** This option can be best understood as 'Delete IF No Content.' Check this box to ensure that empty image frames do not mount on pages if there is no image of the asset reference type linked to the mounted product.
- **Keep With Next:** Check this box to ensure that the selected frame remains with the frame that follows it (resides directly below) on the page. This setting prevents situations where, for example, the name of a product would be separated from its image if the product were mounted at the bottom of the page, and there is only enough room to mount the image frame. With this box checked, both the image and the text box below it containing the product name will mount on the following page in order to keep the elements together. A frame with **Keep With Next** set cannot have a **Split** setting of **Anywhere** or **Within Spread** and vice versa.
- **Align mount bottom:** Select this to ensure that an image frame will always mount at the bottom of the page. In Flatplanner, the frame will align to the bottom of the Flatplan frame. If more than one frame is designated to align mount bottom, the lowermost frame will align to the bottom and the other frame(s) will mount above it, separated by the same gap amount as on the product template.
- **Split Text Frame:** N/A; disabled for image frames.

- **Split Between Objects:** This option applies to repeating frames and is activated when a data source other than 'Mount Object' is selected, e.g., Mount Children. The three split options are **Never**, **Anywhere**, and **Within Spread**.

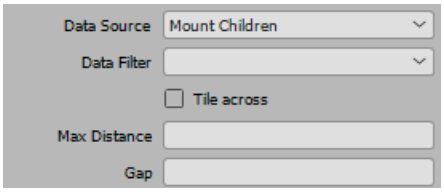


  - Select **Never** to prevent a series of repeating image frames from splitting across a column or page if there are too many frames to fit in one column or on one page.
  - Select **Anywhere** to allow the series of repeated frames to split across a column or onto another page, even if the split continues from a right-hand page to a left-hand page, creating a new spread.
  - Select **Within Spread** to only permit the repeated frames to continue from a left-hand page to a right-hand page, disabling the ability to create a new spread.
- **Context:** The Context option allows for the selection of a STEP context from which to select the image. If left empty, the system will mount the image from your version into the page instead. Normally, you will only choose a specific context if you are building a multi-versioned document and need to determine exactly which context goes into a certain layer version. The quickest and most flexible solution is to leave the context selection empty.
- **Asset Content:** Used to assign an asset reference type to the frame.
- **Asset Sizing:** Dropdown list containing the following options:
  - **Import Asset at Scale:** Image will be scaled according to the **Scale** value entered in the STEP Template Frame panel. By default, the Scale field is blank, meaning that the image will be mounted at actual size unless a percentage below or above 100% is entered.
  - **Scale Asset to Frame:** Image will be scaled proportionally until either width or height fit into the box, unless a **Max Scale** limit is set (see below)
  - **Fit Asset to Frame Width:** Image will be scaled proportionally until the width is identical to the width of the frame, unless a **Max Scale** limit is set (see below)
  - **Fit Asset to Frame Height:** Image will be scaled proportionally until the height is identical to height of the frame, unless a **Max Scale** limit is set (see below)
- **Scale:** Only active when **Import Asset at Scale** is selected. Using this option, images can be scaled with a certain percentage, calculated on the basis of their original scanned size.
- **Max Scale:** Only active when **Scale Asset to Frame**, **Fit Asset to Frame Width**, or **Fit Asset to Frame Height** are selected. Max Scale can be set from 5% to 500%.

  The ability to constrain the image scale for the frame-fitting options using **Max Scale** prevents issues where scaling too high results in a poor image that is not acceptable when printed. For example, if the actual size of the image in STEP is much smaller than the frame to which it is being mounted, the Max Scale option will prevent this small image from scaling up to such a large size that its resolution is too low for print.

Note that if the actual size of the image is larger than the frame, it will still scale down to fit the frame, regardless of whether the Max Scale value is set above 100%. If Max Scale is left blank, images will scale up or down to fit the frame, frame width, or frame height.

- **Size Frame to Asset:** Automatically sizes the image frame to match the size of the image(s) linked inside. I.e., if the image mounts smaller than the image frame on the product template, the frame will shrink to fit the size of the image, and vice versa for images that mount at a larger size than the original image frame.
- **Asset Alignment:** Defines whether the images should be aligned left, center, or right within the image frame.
- **Data Source:** This controls whether the frame should mount content from the object that is being mounted (**Mount Object**; most common), from children of the mounted object (**Mount Children**), or from an asset or product reference type. By default, the data source is **Mount Object**, which mounts the object only. Select **Mount Children** or a product / asset reference type when the image frame is intended to repeat on the page. The image frame repeats in instances where information is available from multiple child objects or from multiple referenced assets. When selected, the following options are activated in the STEP Template Frame panel: **Data Filter**, **Multi Asset Across**, **Max Distance**, **Gap**, and **Split**. (If anything other than 'Mount Object' is selected for Data Source, the checkbox is labeled **Tile Across** instead of Multi Asset Across.)



- **Data Filter:** Only activated when Data Source is 'Mount Children.' Used when mounting publication or sections objects to pull information from child sections / subsections. Available options are **Sections Only - Sort by Section Name** and **Sections Only - Sort by Page Number**. This functionality does not exist for images, but the dropdown exists for image frames in the instance that a future customer need may arise.

  This functionality is typically used in AutoPage publications to create tables of contents / section indexes. See the **Creating Tables of Contents in AutoPage** section of the **AutoPage** documentation for more information.
- **Multi Asset Across:** Is activated when Data Source is 'Mount Object.' When there are multiple images linked to a single product using the same asset reference type. this setting allows multiple images to be placed inside a single frame and tiled horizontally. If not selected, the images will be mounted vertically.
- **Tile across:** Check this box if repeated frames should be tiled horizontally across the page instead of stacking vertically beneath one another. Activated if anything other than 'Mount Object' is selected for Data Source.
- **Max Distance:** The maximum distance that horizontally tiled frames should repeated across the page (L-R) before stopping and wrapping back around to begin a new row of repeated frames underneath
- **Gap:** The amount of space to place between repeated frames when tiled horizontally

Image Frame Parameters for InDesign-created Page Templates

The below screenshot shows the available image parameters for InDesign-created page templates, which are only applicable for Flatplanner publications and typically are **Galley** templates. The options exclusive to page templates are **Frame Type** and **Frame ID**. The remainder of the options (Context, Asset Content, Asset Sizing, Max Scale, Size Frame to Asset, and Asset Alignment) are identical to those available for product templates.

For information on how to use these options, see the **Galley Templates** section of the **Flatplanner** documentation.

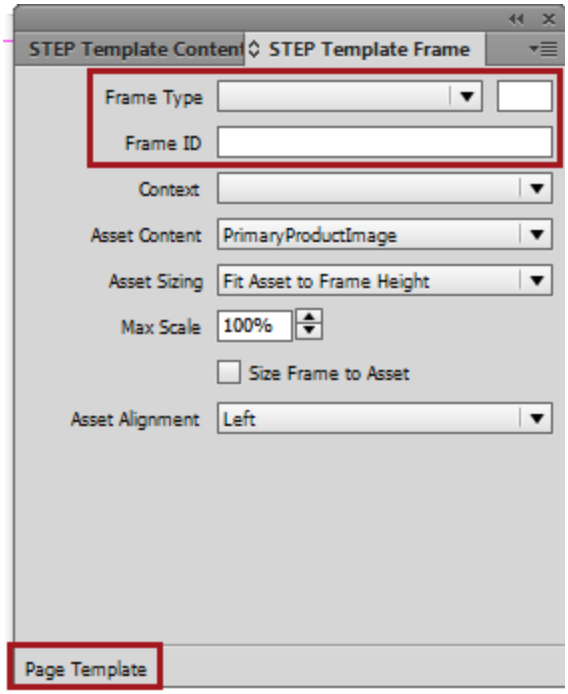
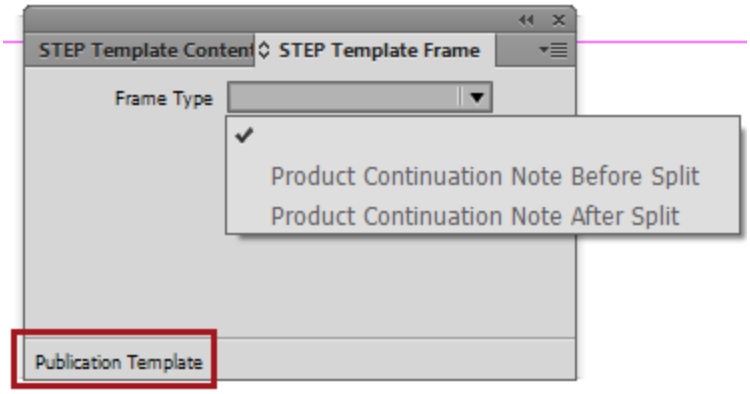


Image Frame Parameters for Publication Templates

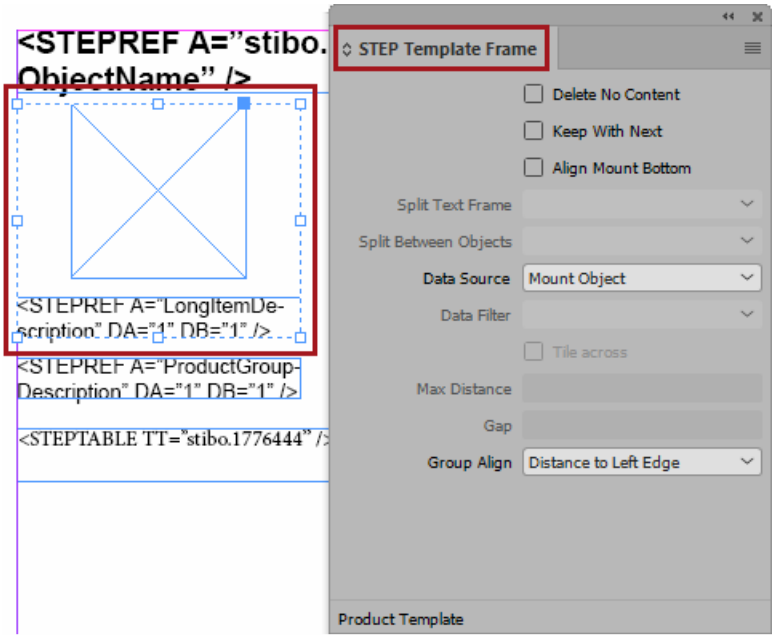
Though a 'Frame Type' dropdown list is available for image frames when working with publication templates, the options are grayed out, as they are not applicable to image frames. The dropdown exists, however, in the instance that it might have a future use if a customer need arises.

These two options (Product Continuation Note Before Split and Product Continuation Note After Split) only apply to text frames on publication templates that will be used in AutoPage publications. See **AutoPage Pagination Rule Actions** in the **AutoPage** documentation for more information.

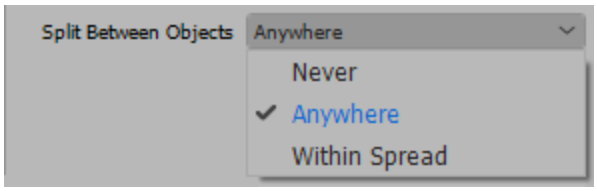

STEP Template Content
STEP Template Frame
Frame Type
Product Continuation Note Before Split
Product Continuation Note After Split
Publication Template

Grouped Frame Parameters

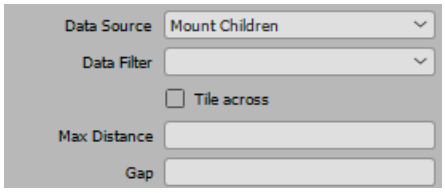
Below is a description of the individual parameters available when configuring grouped frames using the STEP Template Frame panel in InDesign. One common use for grouped frames is to group an image frame together with a text frame in order to mount a linked asset and a metadata attribute connected to the asset (for example, an image caption).



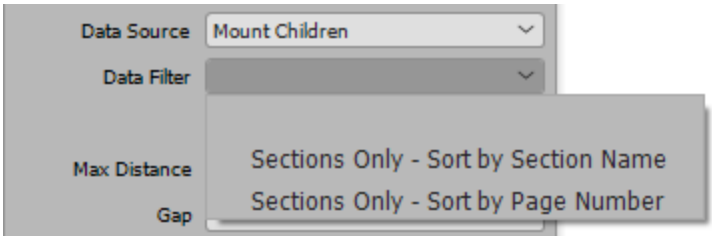
- **Delete No Content:** This option can be best understood as 'Delete IF No Content.' Check this box to ensure that the group of frames does not mount on pages if no content exists in STEP for *all* of the individual frames included in the group.
- **Keep With Next:** Check this box to ensure that the grouped frame remains with the frame that follows it (resides directly below) on the page. A frame with **Keep With Next** set cannot have a **Split** setting of **Anywhere** or **Within Spread**, and vice versa.
- **Align mount bottom:** Select this to ensure that a grouped frame will always mount at the bottom of the page. In Flatplanner, the frame will align to the bottom of the Flatplan frame. If more than one frame is designated to align mount bottom, the lowermost frame will align to the bottom and the other frame(s) will mount above it, separated by the same gap amount as on the product template.
- **Split Text Frame:** N/A; disabled for grouped frames.
- **Split Between Objects:** This option applies to repeating frames and is activated when a data source other than 'Mount Object' is selected, e.g., Mount Children. The three split options are **Never**, **Anywhere**, and **Within Spread**.



  - Select **Never** to prevent a series of repeating grouped frames from splitting across a column or page if there are too many frames to fit in one column or on one page.
  - Select **Anywhere** to allow the series of repeated grouped frames to split across a column or onto another page, even if the split continues from a right-hand page to a left-hand page, creating a new spread.
  - Select **Within Spread** to only permit the repeated grouped frames to continue from a left-hand page to a right-hand page, disabling the ability to create a new spread.
- **Data Source:** This controls whether the grouped frames should mount content from the object that is being mounted (**Mount Object**; most common), from children of the mounted object (**Mount Children**), or from an asset or product linked to the mounted object by a reference type. By default, the data source is **Mount Object**, which extracts values from the mounted object only.
  Select **Mount Children** or a product / asset reference type when the grouped frame is intended to repeat on the page. The frame repeats in instances where information is available from multiple child objects or from multiple referenced products or assets. When selected, the following options are activated in the STEP Template Frame panel: **Data Filter**, **Tile across**, **Max Distance**, and **Gap**.

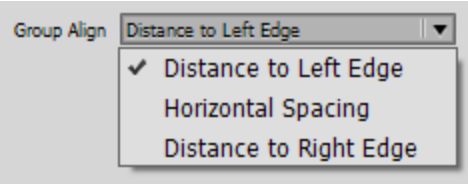


- **Data Filter:** Only activated when Data Source is 'Mount Children.' Used when mounting publication or section objects to pull information (such as metadata attribute values or section names) from child sections / subsections. Available options are **Sections Only - Sort by Section Name** and **Sections Only - Sort by Page Number**. This functionality is typically used in AutoPage publications to create tables of contents / section indexes. See the **Creating a Table of Contents Product Template** topic for more information.



- **Tile across:** Check this box if repeated frames should be tiled horizontally across the page instead of stacking vertically beneath one another

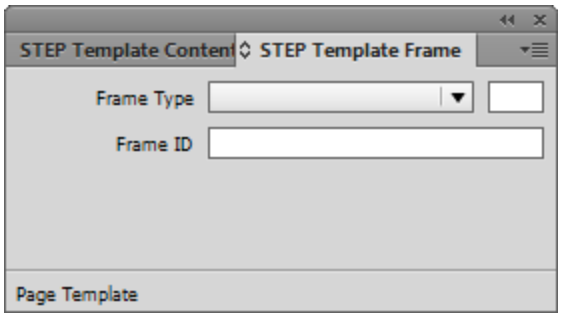
- **Max Distance:** The maximum distance that horizontally tiled frames should repeat across the page (L-R) before stopping and wrapping back around to begin a new row of repeated frames underneath
- **Gap:** The amount of space to place between repeated frames when tiled horizontally
- **Group Align:** Three options are available in the Group Align dropdown menu that enable you to set additional parameters for grouped frames.



  - **Distance to Left Edge:** Same distance as if items were not grouped.
  - **Horizontal Spacing:** If there is text is to the right of the image with a 5 mm gap and the image changes size, the text still ends up 5 mm from the image.
  - **Distance to Right Edge:** If the group grows or shrinks due to image size, the boxes maintain their distance to the right edge.

Grouped Frame Parameters for InDesign-created Page Templates

The below screenshot shows the available grouped frame parameters for InDesign-created page templates, which are only applicable for Flatplanner publications and typically are **Galley** templates. The options are **Frame Type** and **Frame ID**.

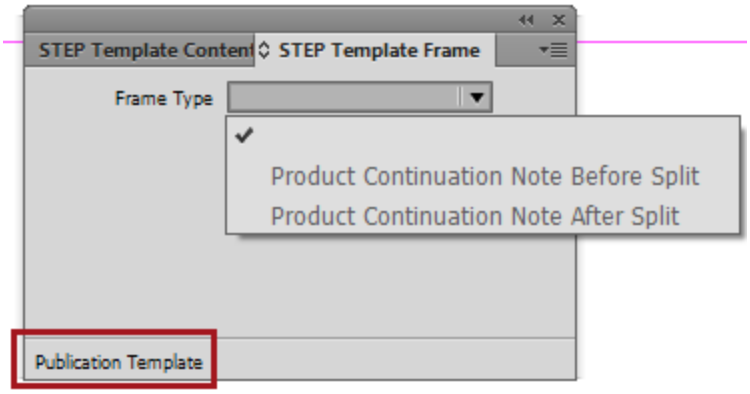


For information on how to use these options, see the **Galley Templates** section of the **Flatplanner** documentation.

Grouped Frame Parameters for Publication Templates

Though a 'Frame Type' dropdown list is available for grouped frames when working with publication templates, the options are grayed out, as they are not applicable to grouped frames. The dropdown exists, however, in the instance that it might have a future use if a customer need arises.

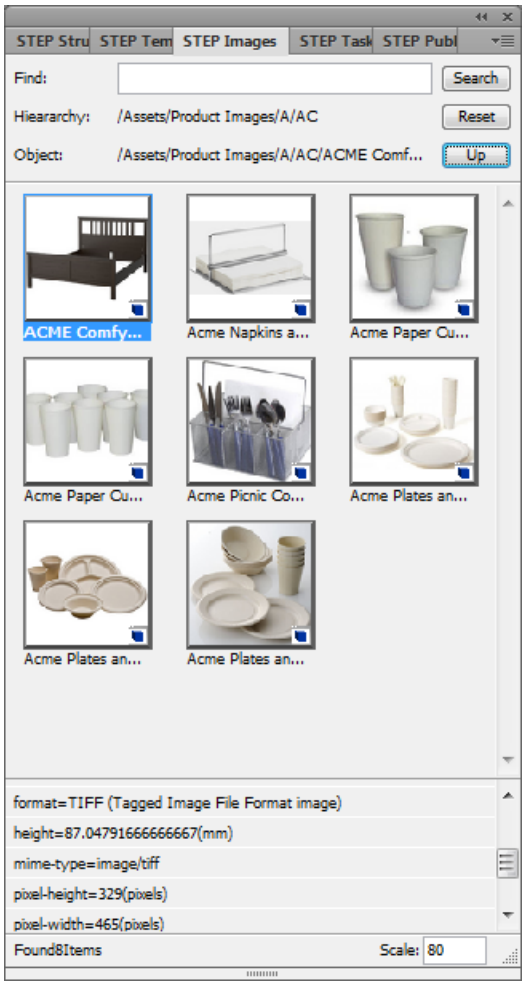
These two options (Product Continuation Note Before Split and Product Continuation Note After Split) only apply to text frames on publication templates that will be used in AutoPage publications. See **AutoPage Pagination Rule Actions** in the **AutoPage** documentation for more information.


STEP Template Content
STEP Template Frame
Frame Type
Product Continuation Note Before Split
Product Continuation Note After Split
Publication Template

STEP Images

The **STEP Images** panel is used to find images and mount them on the InDesign page. STEP Images enables you to search for images across the whole STEP database. You can use wild cards * (wild card string) and ? (wild card character) in your search. Searching is performed under the selected hierarchy (if a hierarchy is selected). The maximum number of images returned in a search is 150.

Note: Searches in the STEP Images panel do not function the same way as searches in the STEP Structure View and STEP Template Content panels, i.e., searches are not typeahead and cannot be filtered by object type.



The lower part of STEP Images displays the details of the current selected image if the **Show Details** option is selected (see the next section of this topic, **Options Menu**).

Clicking the **Reset** button after a search will return the view to the top level.

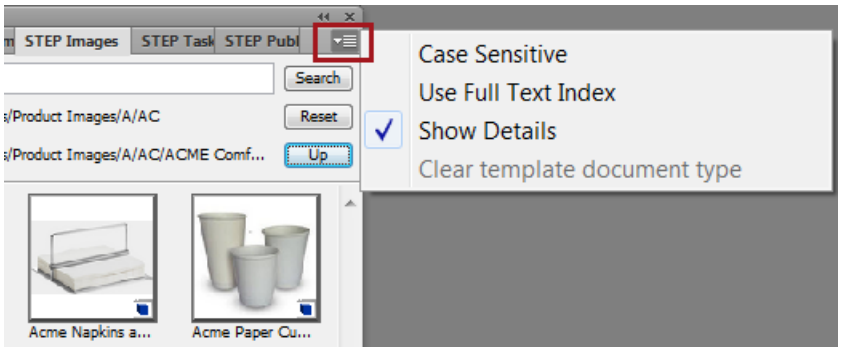
Clicking the **Up** button will bring the view one level back.

Use the **Scale** field to scale selected items in the STEP Images panel.

Options Menu

The **Options** menu in the upper-left corner of the STEP Images panel contains the following commands:

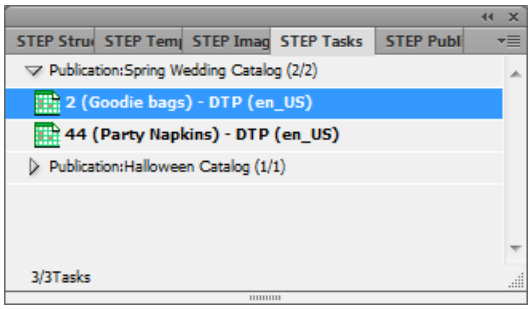
- **Case Sensitive:** Use this option to determine if you want to search in case sensitive mode or not.
- **Use Full Text Index:** Use this option to search for attribute values that are defined as full text indexable in the attribute editor in STEP. (It may take a little while to show the results).
- **Show Details:** Use this option to get details about a selected image. The details are shown in the lower part of the window.



STEP Tasks

The STEP Tasks panel is used in conjunction with Flatplanner workflows and enables creative staff (DTP operators) to pick up workflow tasks from within InDesign. The panel displays a tree view of tasks similar to what is displayed in the STEP Workflow **Tasks** tab in the workbench, except the tasks picked up from within InDesign are Flatplanner planned pages. The tasks are grouped by publication.

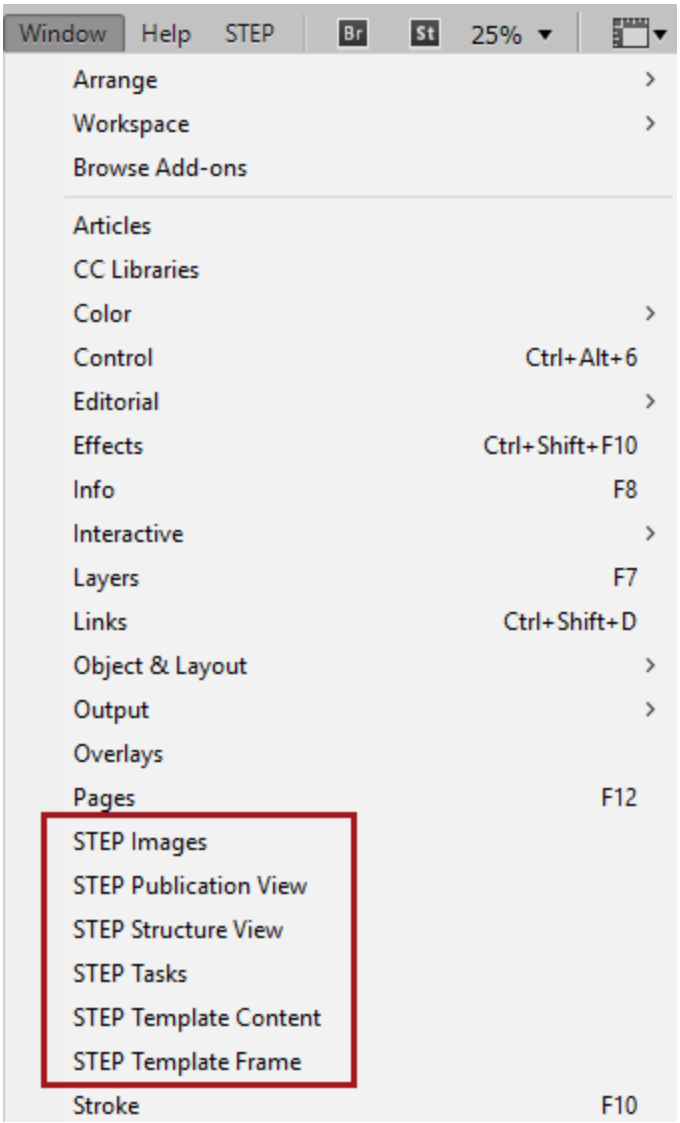
From the STEP Tasks panel, DTP operators can accept tasks, submit tasks, reject tasks, and more. Tasks typically arrive in the STEP Tasks panel after the page has already been planned in STEP by a merchandiser user, and then released to the DTP operator for further work.



This topic provides a broad overview of the options available on the STEP Tasks panel but does not go into detail on how to use this panel with Flatplanner. See **Configuring DTP Task Views for InDesign** in the **Flatplanner** documentation for more information.

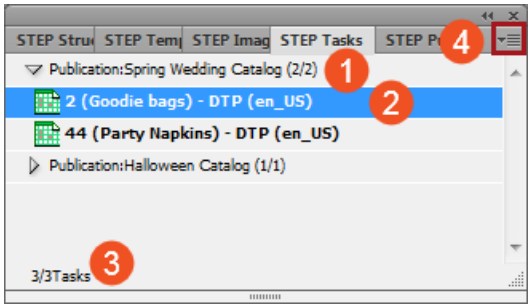
Accessing the STEP Tasks Panel

The STEP Tasks panel is accessed by navigating to Window > STEP Structure View from the InDesign application bar across the top of the InDesign interface.



Description of the STEP Tasks Panel

The following screenshot shows the basic objects that display on the STEP Tasks panel. The numbers in the image correspond to the numbered list below it.

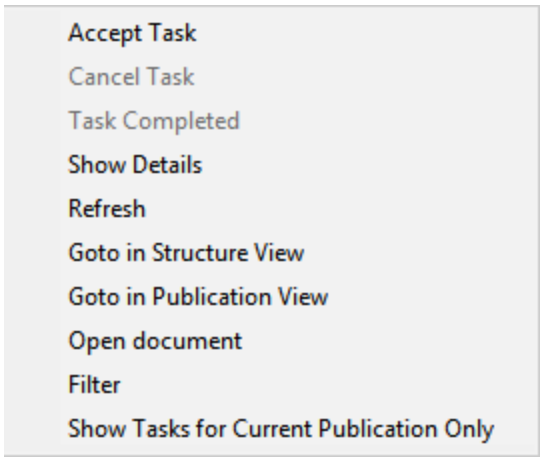


1. **Publication:** Each task (Flatplanner planned page) is organized by publication in the STEP Tasks panel. The numbers in parentheses after the publication name represent the number of unaccepted tasks for the publication / number of available tasks for the entire publication.
2. **Task:** The Flatplanner planned page that is ready to be actioned by the InDesign user, designated by the page number and the page name. If the task is in bold text, the task is new and it has not yet been accepted. If it is in regular text, the task has been accepted. Displayed after the page number and the page name is the name of the current workflow state and the ID of the locale used in the context of your publication version. For example, in the above screenshot, DTP is the workflow state and en_US is the locale ID of an English US dimension point.
3. **Status:** Displays the number of unaccepted tasks for all displayed publications / number of available tasks for all displayed publications.
4. **Options menu:** Sub-menu to display additional functions; described in the next section of this topic.

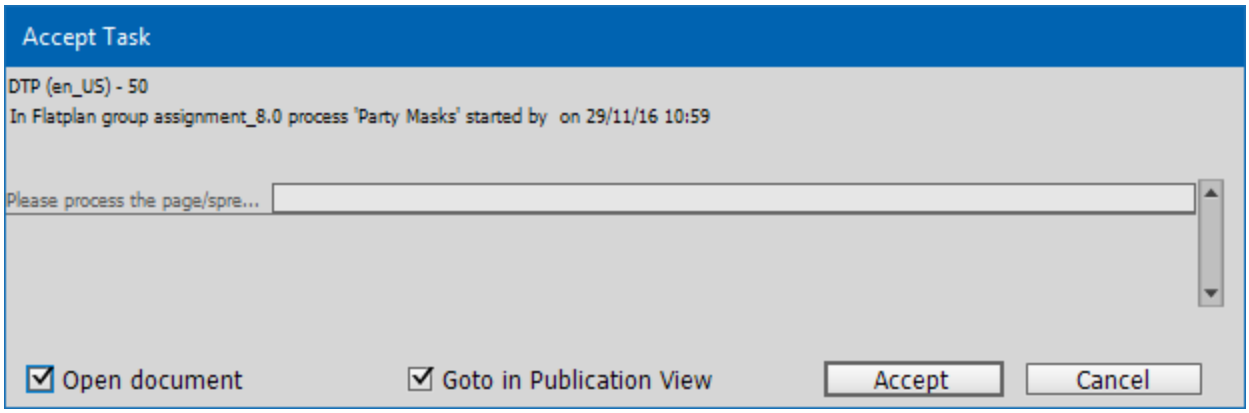
Options Menu

The **Options** menu of the STEP Tasks panel contains the following commands.

Note: With the exception of 'Refresh', 'Filter', and 'Show Tasks for Current Publication Only', a task must be selected in order to activate the menu options. (These commands are also available by selecting a task and right-clicking.)



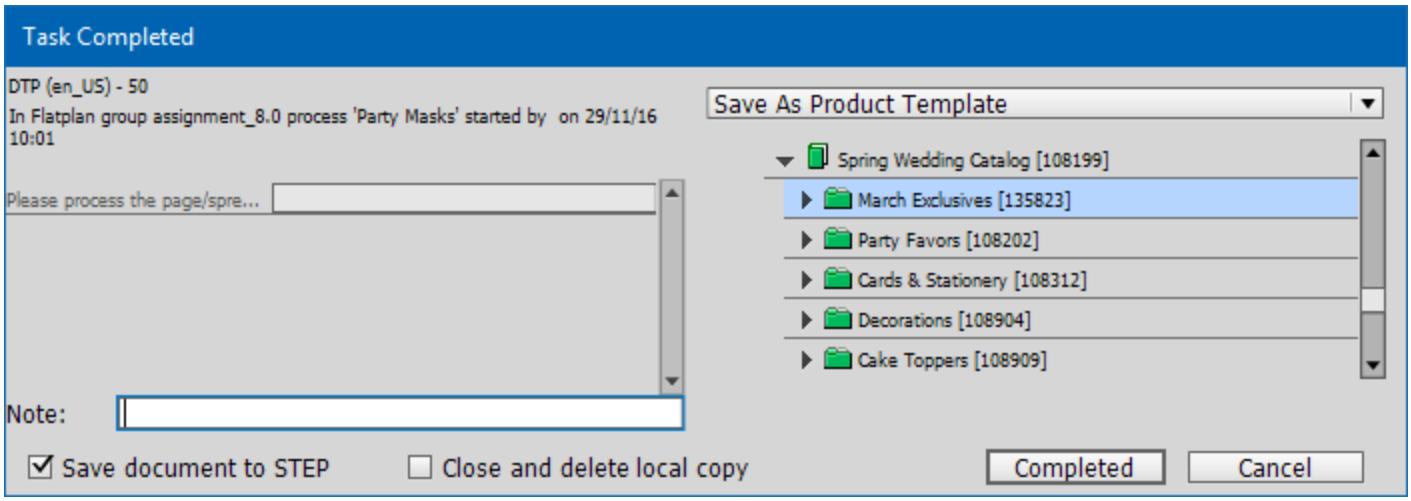
- **Accept Task:** Launches the 'Accept' Task dialog. To accept the task, click 'Accept'. To cancel and leave the task unaccepted, click 'Cancel'. To open the document in InDesign once the task is accepted, check 'Open document' before clicking 'Accept'. To automatically jump to the planned page in the STEP Publication View panel, check 'Goto in Publication View' before clicking 'Accept'. After accepting a task, the name of the task appears in regular (non-bold) text, and the list of tasks is refreshed.



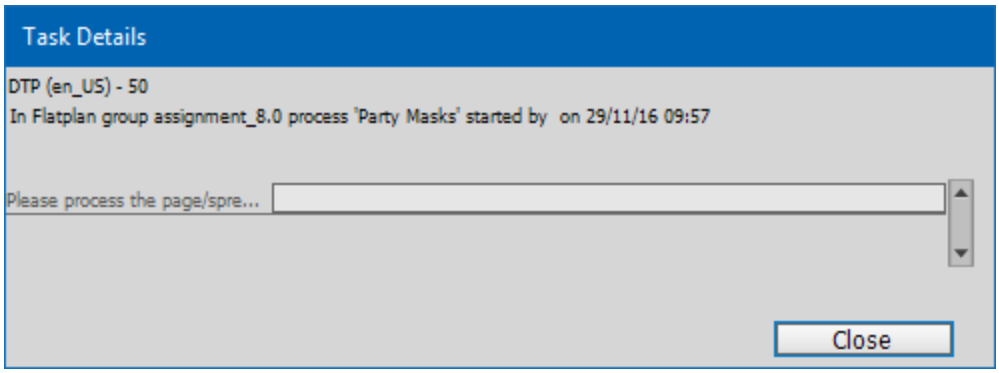
- **Cancel Task:** Launches the 'Cancel Task' dialog. This option is only activated when an accepted task is selected. Click 'Cancel Task' to return the accepted task to the list of incomplete tasks. After canceling a task, the name of the task becomes bold again and the list of tasks is refreshed. (Note that the open document is not closed when the task is canceled.)
- **Task Completed:** Launches the 'Task Completed' dialog. (This option is only activated when an accepted task is selected.) Click 'Completed' to complete a task and send a message to the next person in the workflow. After completing a task, the list in the STEP Tasks tab is refreshed, and the task is removed from the list.

  To save the finished document back to STEP, check the 'Save document to STEP' box before clicking 'Completed'. (The Section folder where the actual pages should be saved in STEP is highlighted automatically.) To leave a note for the next user in the workflow, leave a comment in the 'Note' field.

  To save your document in STEP only, and not save it locally on your computer, check 'Close and delete local copy' before clicking 'Completed'. (Note that the document must first be saved locally before it can be saved to STEP.)



- **Show Details:** Use this option to display the 'Task Details' dialog, which shows more details about a selected task.

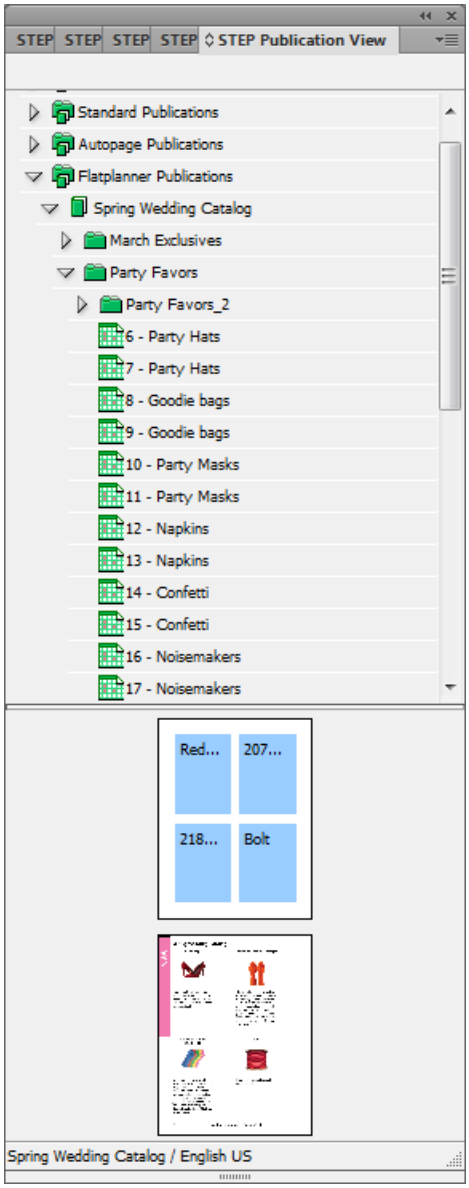


- **Refresh:** Click to refresh the list of tasks.
- **Goto in Structure View:** Click to jump to the planned page in the STEP Structure View panel.
- **Goto in Publication View:** Click to jump to the planned page in the STEP Publication View panel.
- **Open document:** Click to open the InDesign document that is associated with the selected planned page.
- **Filter:** Click to filter your task types by workflow state. A 'Choose Item' dialog box appears where you can select the tasks you would like to see.
- **Show Tasks for Current Publication Only:** Click to hide all tasks that are from publications other than the one that you are currently working with, which is determined by the version that you have selected under STEP > **Change Version**.

STEP Publication View

The STEP Publication View panel is used in conjunction with the Flatplanner publishing component. It is used to view the publication hierarchy in STEP and is where Flatplanner pages are mounted from.

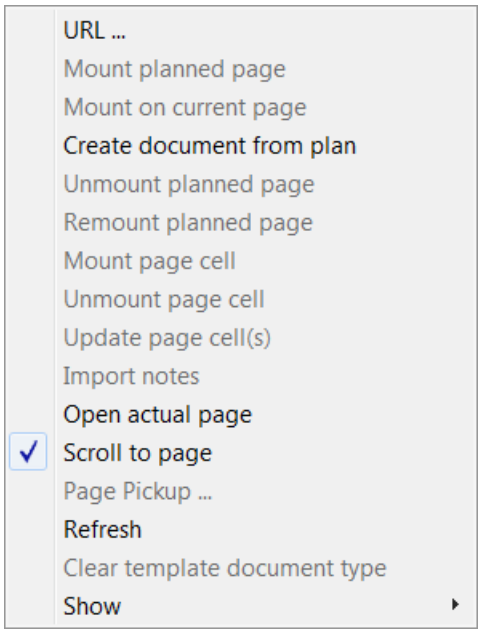
Note: Search functionality is not available within the STEP Publication View panel.



It is also possible to mount or unmount page cells from the Preview area (lower part of the STEP Publication View); see the next section of this topic, **Options Menu**, for more information.

Options Menu

The **Options** menu in the STEP Publication View (arrow in upper right corner) contains the following commands.

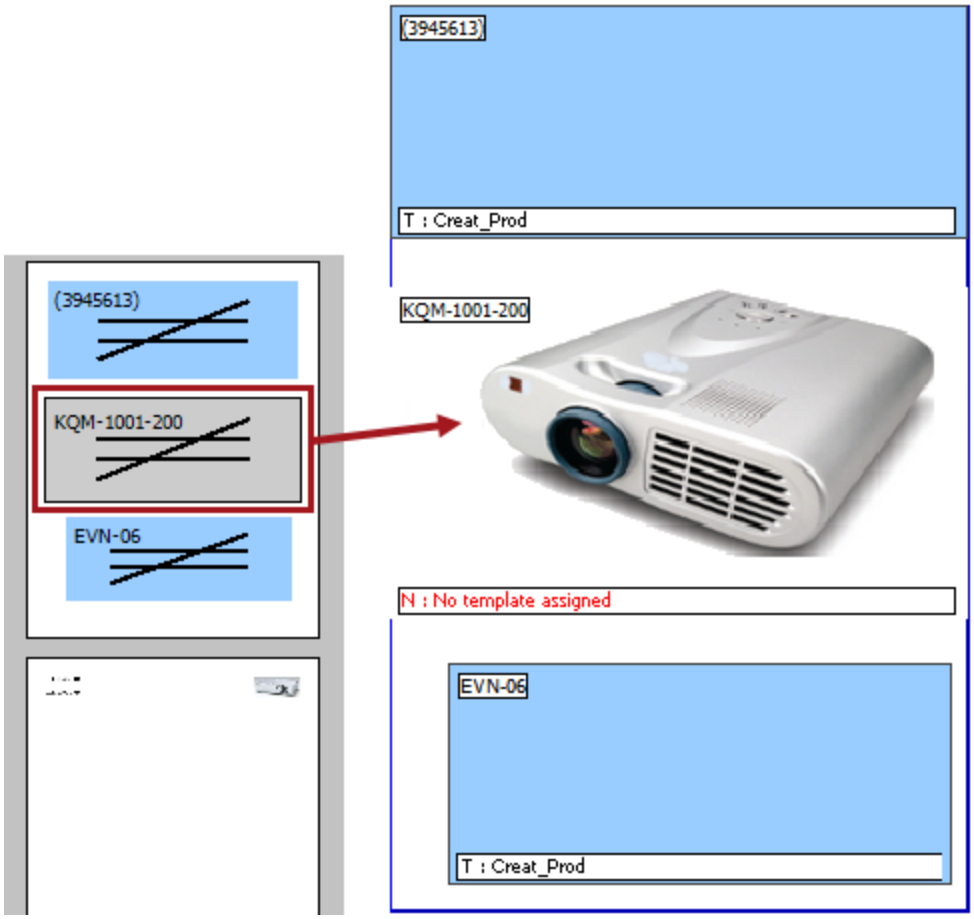


- **URL:** Selecting this option allows you to copy the STEP URL of a selected object in the publication hierarchy so it can be easily located in the STEP Workbench.
- **Mount planned page:** Use this option to mount a planned page on an InDesign document.
- **Mount on current page:** Use this option to mount a planned page on a specific page, e.g., page 3 in your InDesign document.

> **Note:** The options 'Mount planned page' and 'Mount on current page' are only enabled when there is a mounting page or a publication template already opened in InDesign.

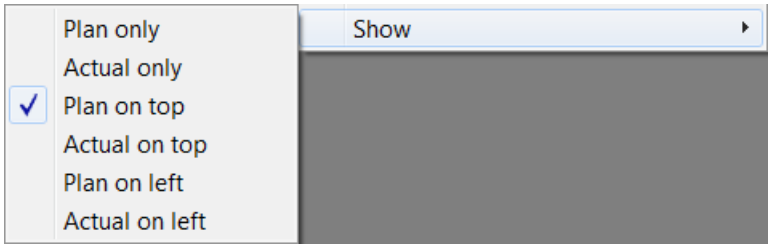
- **Create document from plan:** Use this option to mount the plan using the publication template saved in STEP. This option does not require an InDesign document to already be opened in InDesign to mount your pages.
- **Unmount planned page:** Use this option to remove a mounted plan from a page.
- **Remount planned page:** Use this option to remount planned pages if content in STEP has been updated since the page was originally mounted.
- **Mount page cell:** After mounting the planned page in InDesign, if you are adding any new products to a page, then use this option to mount those new products that are added onto the plan. This will mount only the newly added product onto the page. The cell must be selected in the Preview area (lower area of the STEP Publication View).

Note: If there are images directly added onto the planned page in a frame, you cannot mount these images using the 'Mount page cell' option. A frame that contains images is identified by a gray-shaded background, as pictured below.



- **Unmount page cell:** Use this option to unmount a page cell if you have mounted a Flatplan and selected a cell in the Preview area (lower area of the STEP Publication View).
- **Update page cell(s):** Use this option to update the mounted product to align with changes made in the database. This option will be enabled on a mounted Flatplan if you have selected a cell in the Preview area (lower area of the STEP Publication View). If you need to update page cells, a 'not equal' symbol ≠ is shown in the STEP Publication View.
- **Import notes:** Use this option to import Notes placed on the Flatplan in STEP
- **Open actual page:** Use this option to open a DTP document (InDesign page) from a section in your publication.
- **Scroll to page:** Use this option to auto-scroll the page in the document that corresponds to the selected Flatplan in the STEP Publication View.
- **Page Pickup:** n/a - Not available.
- **Refresh:** Use this option to update the STEP Publication View.

- **Show:** Use this option to choose between different views of the pages (actual / planned) in the lower part of the STEP Publication View.
  Available **Show** options are Plan only, Actual only, Plan on top, Actual on top, Plan on left, and Actual on left.



Templates in STEP Publisher

To reduce the time needed to build pages, ensure style consistency, and improve accuracy, STEP Publisher allows you to create templates to roughly plan the page layout before mounting. Templates can easily be created, maintained, and reused by designers using InDesign.

The STEP Publisher / STEP'n'design plugin enables creation of the following template documents:

- Publication templates
- Product templates
- Page templates

Publication templates are also sometimes referred to as 'master pages' or 'mounting pages.' They define the document size, margins, paragraph styles, character styles, table rules, swatches, and so forth that are used throughout a publication. See the **Publication Templates** topic for more information.

Product templates predefine selections of STEP database content with powerful formatting rules that will automatically style content when dragged and dropped onto the page. These templates reduce the time needed to build pages, ensure style consistency, and improve accuracy. See the **Product Templates** topic for more information.

Page templates, which are only used with the Flatplanner component, are used to roughly plan the location of product, asset, and/or classification objects on Flatplanner planned pages in a gridded format.

Note: Since page templates are only used with Flatplanner, they are not covered in the STEP Publisher portion of the STEP Online Help documentation. See the **Creating Page Templates** and **Creating Page Templates in InDesign** topics in the **Flatplanner** documentation for more information.

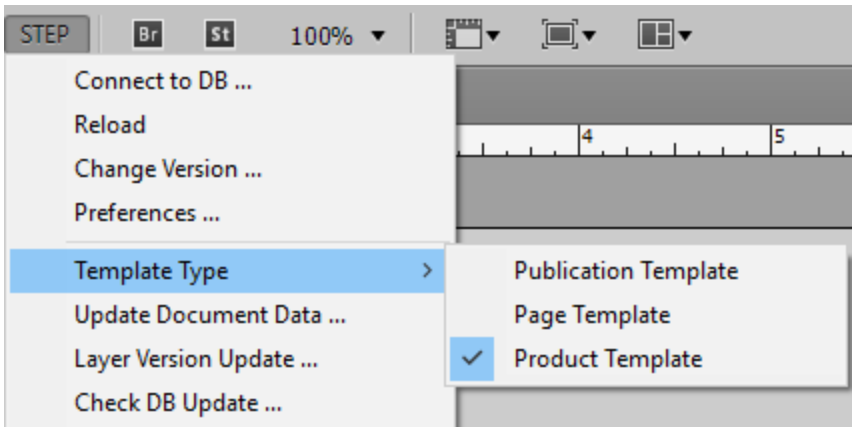
Which templates to use depends on the STEP Publisher components that your system contains (see table below).

	STEP Publisher	Flatplanner	AutoPage
Product Template	X*	X	X
Page Template		X	
Publication Template	X	X	X
* The use of product templates is optional when building publications strictly through drag and drop, but strongly recommended.			

	STEP Publisher	Flatplanner	AutoPage

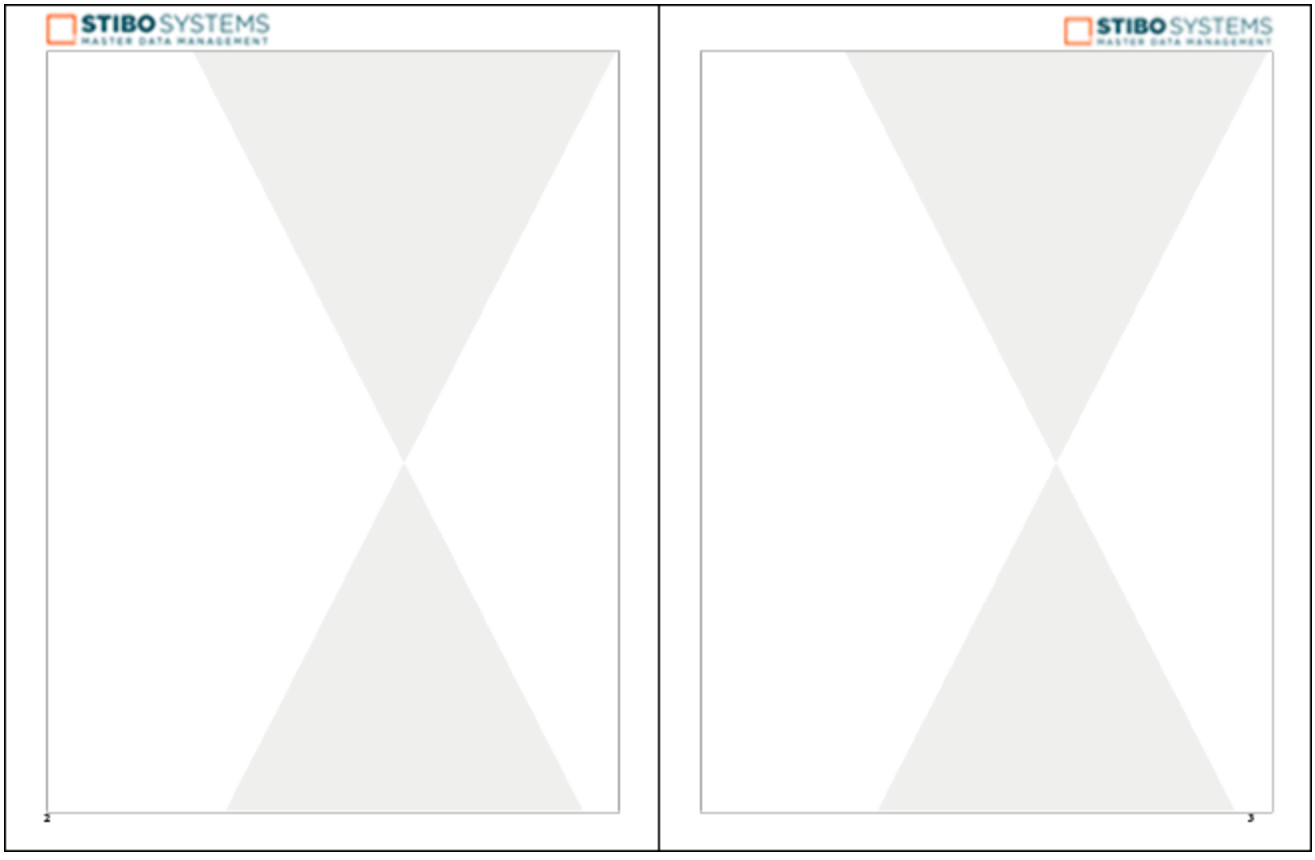
Note: The product templates used when working with or without Flatplanner or AutoPage are exactly the same.

Standard InDesign documents with a file extension of .indd are used to create STEP Publisher templates. To designate an InDesign document as a STEP Publisher template, navigate to STEP > **Template Type**, then select the desired template type from the popup menu.



Publication Templates

When creating InDesign pages using STEP Publisher, **publication templates** are used. Publication templates, like product templates, are normal InDesign documents (.indd) and are used with all STEP Publisher components—STEP Publisher ('drag and drop'), Flatplanner, and AutoPage. They serve as the foundation of publications created with STEP and define the document size, margins, paragraph styles, character styles, table rules, swatches, page numbers, and so forth that are used throughout a publication. Whereas **product templates** serve to define the **layout** of product presentations on InDesign pages, **publication templates** are the **empty pages** onto which objects (typically product objects) are placed. Since the process of placing items onto publication templates from STEP is referred to as 'mounting,' publication templates can also be referred to as 'mounting pages.'



Topics Covered in this Documentation Section

This documentation section addresses the following publication template topics:

- Creating a publication template
- Publication template layout, formatting, and styles
- Storing and editing publication templates

The following topic also involves publication templates but is not covered in this documentation section:

- **Creating Layers in Publication Templates:** See the **Working With Version Layers** topic for more information.

Note: Though objects other than products can be mounted onto InDesign pages from STEP (including classification folders, entities, and green publication hierarchy objects themselves), the subtopics in this documentation will refer to InDesign page layouts as 'product presentations.' This is to streamline the language used in presenting this information.

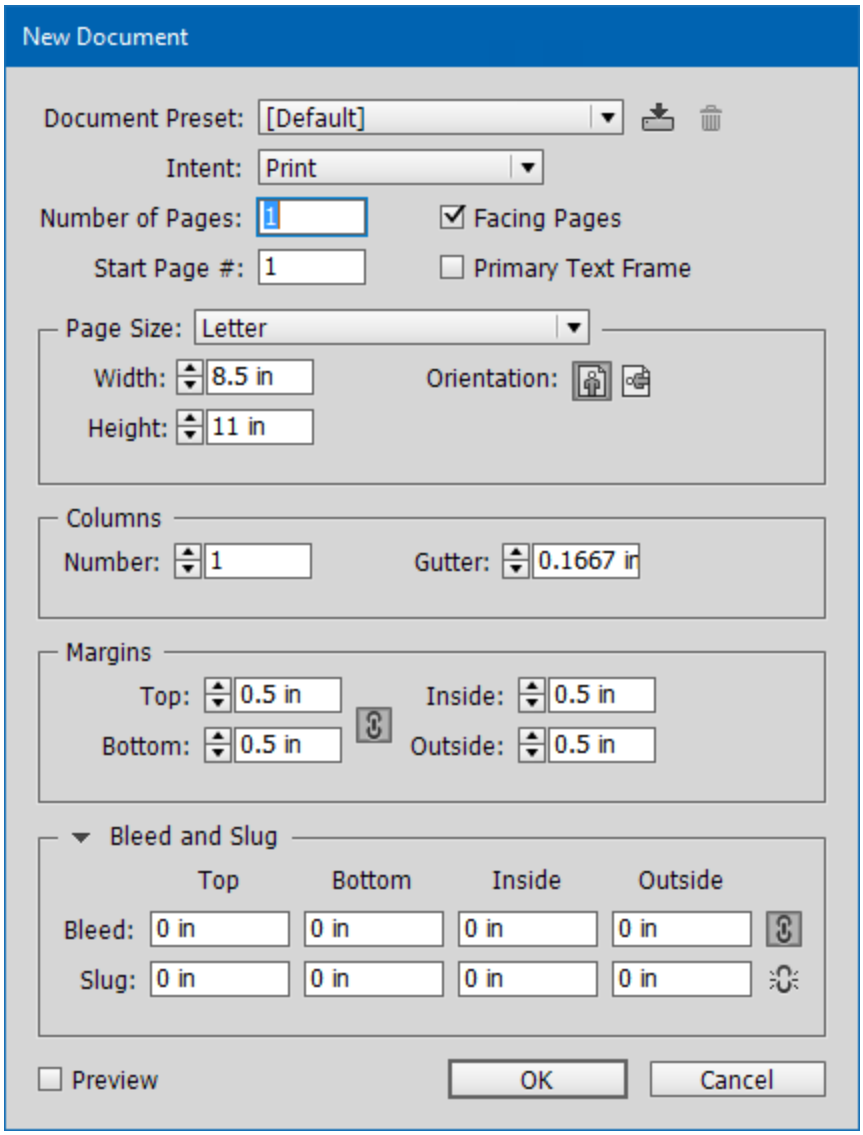
Creating a Publication Template

STEP Publisher publication templates start out just like any other InDesign document—a blank .indd file. They become publication templates after being designated as such in STEP Publisher. In addition to background graphics such as logos, publication templates also typically contain footers, sidebars (such as section names), page numbers, and so forth.

This topic explains how to create and configure a publication template from a blank InDesign file, as well as create a publication template from a previously existing master document. It does not describe how to use standard InDesign functionality such as adding page numbers to master pages, since this documentation assumes the reader already has a working knowledge of InDesign.

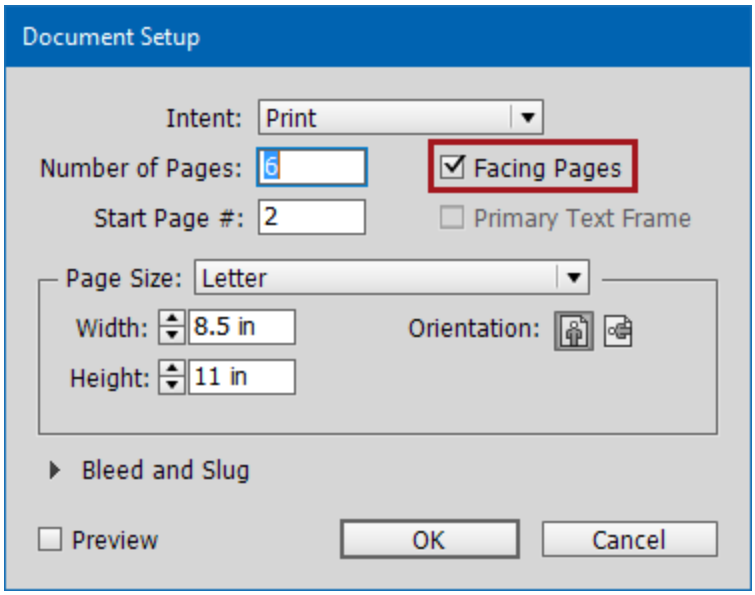
Creating a Publication Template as a New Document

1. After opening InDesign, begin the process of creating a new InDesign document by navigating to File > New > **Document** or typing Ctrl+N.
2. In the **New Document** dialog that displays, define the settings for your template, including page size, margins, and bleed / slug. Publication templates can also be created with multiple columns. In most instances, these settings will apply to the entire publication, though it is possible to create additional master pages in your publication template that have different page sizes, margins, and so forth. See the 'Master Pages of Different Sizes' subsection of this topic below for more information.



3. Check the **Facing Pages** check box to create a spread for the master page. When using Flatplanner and AutoPage, the publication template must be created as a spread, by creating two pages based off of the master page.

Note: If you are working with a previously created master document that does not already have Facing Pages checked, you can correct this by navigating to File > **Document Setup** in InDesign and checking the **Facing Pages** box on the Document Setup dialog.

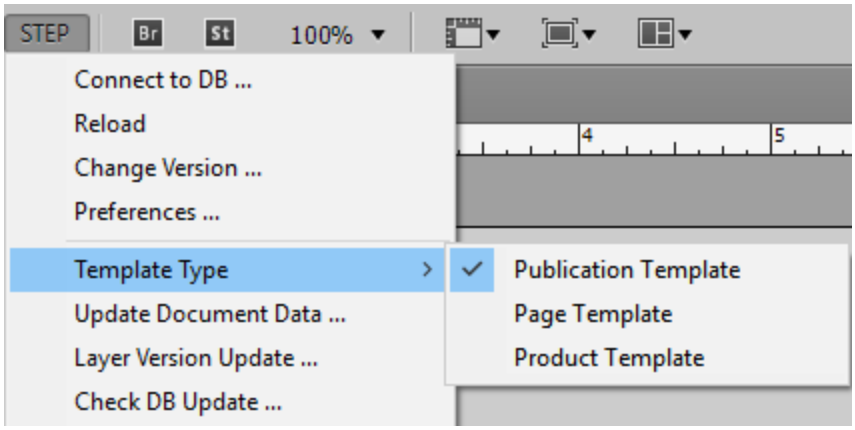


4. Click **OK** to finish creating the empty document.

Designating the Template Type

Next, designate your blank InDesign document as a publication template.

1. With your blank InDesign document open, Navigate to STEP > **Template Type**.
2. Select **Publication Template** from the STEP menu.

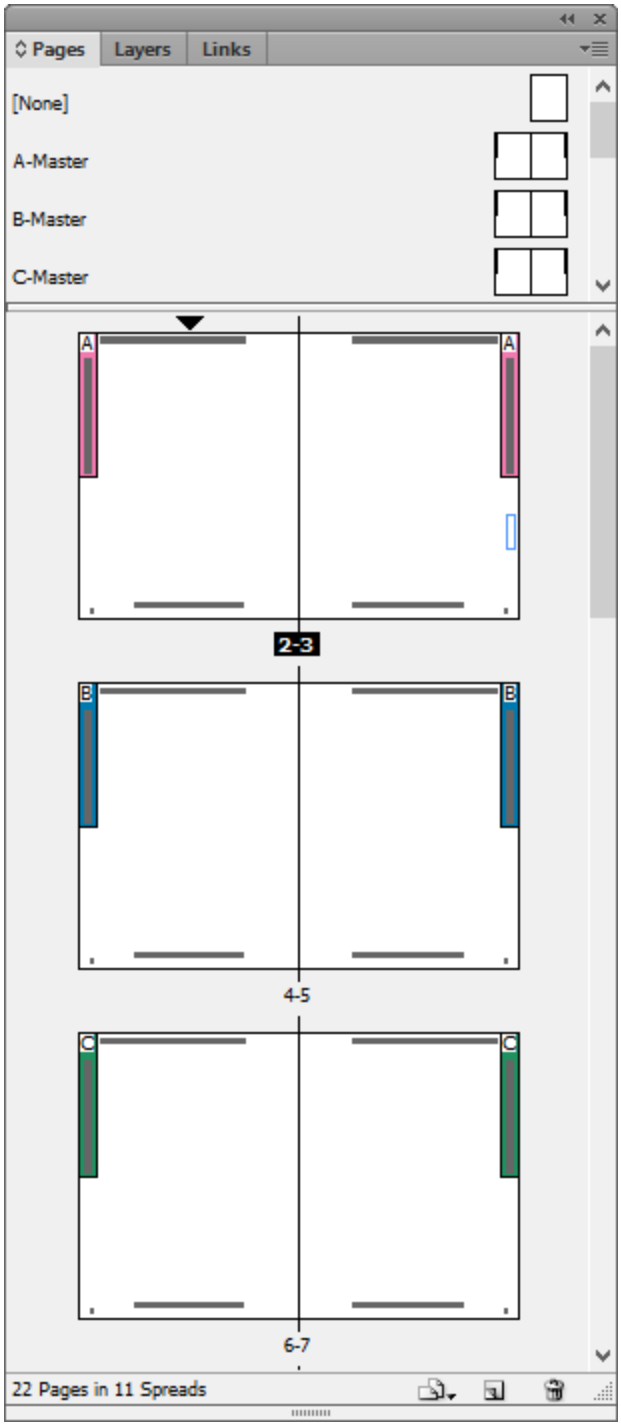


Master Pages and Spreads

A publication template can consist of one or many master pages and spreads. Many publications, especially large catalogs, need more than one master spread because each section may have, for example, different colored thumb tabs for each chapter. The following screenshot shows a publication template as viewed in the

InDesign **Pages** panel. It contains three **master pages** (A-Master, B-Master, and C-Master) and three **spreads** based off of these master pages—pages 2-3 are created from A-Master, pages 4-5 are created from B-Master, and pages 6-7 are created from C-Master.

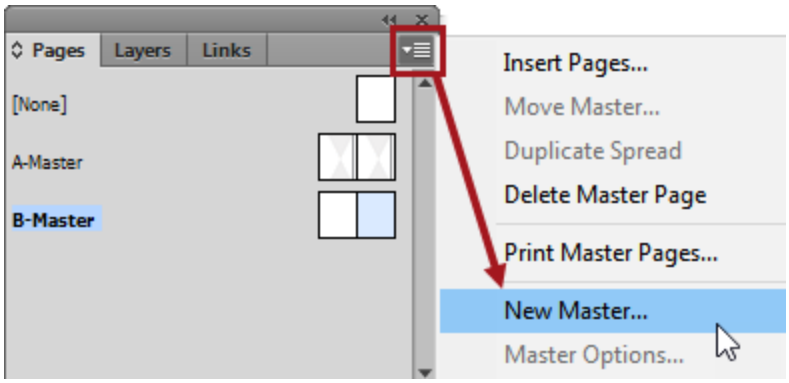
Note: Each page spread must only contain two pages.



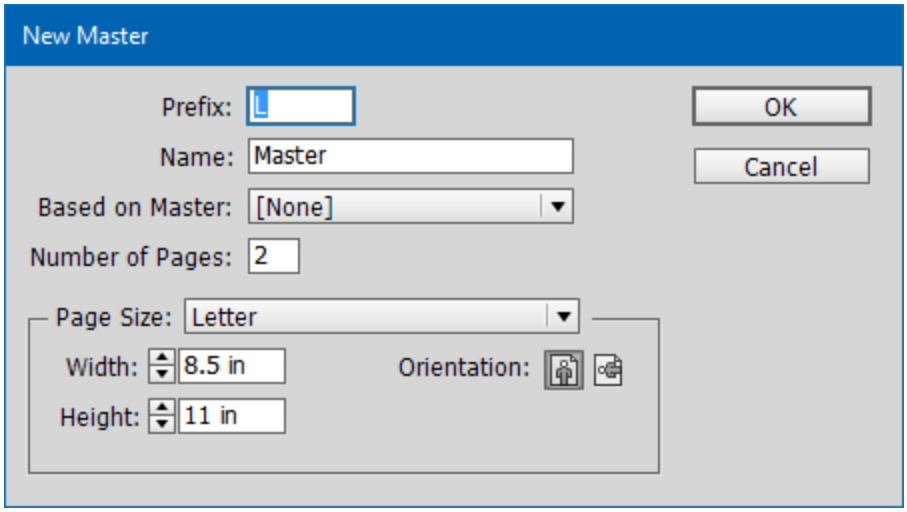
Page spreads must be created from the master pages because products can only be mounted on **pages**, not on master pages. For standard drag-and-drop mounting operations, users will drag products onto one of the page spreads and not a master page. For the AutoPage and Flatplanner components, these page spreads must be mapped to publication sections using pagination rules. For more information, see **AutoPage Pagination Rules** in the **AutoPage** documentation and **Flatplanner Pagination Rules** in the **Flatplanner** documentation.

To create a new master page in InDesign:

1. Open the **Pages** panel (navigate to Window > Pages or press F12).
2. Click the **Options** menu in the upper right corner of the panel and select **New Master**.



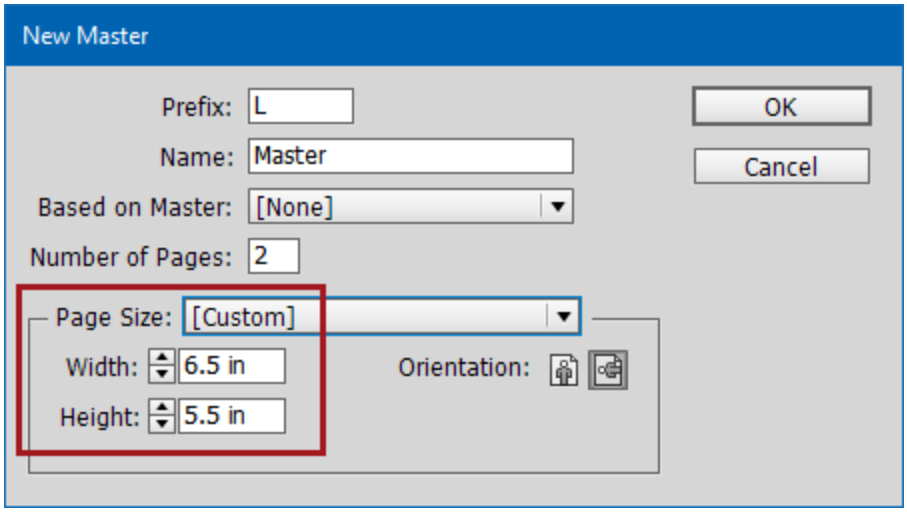
3. Configure your new master page on the **New Master** dialog, then click OK to complete.



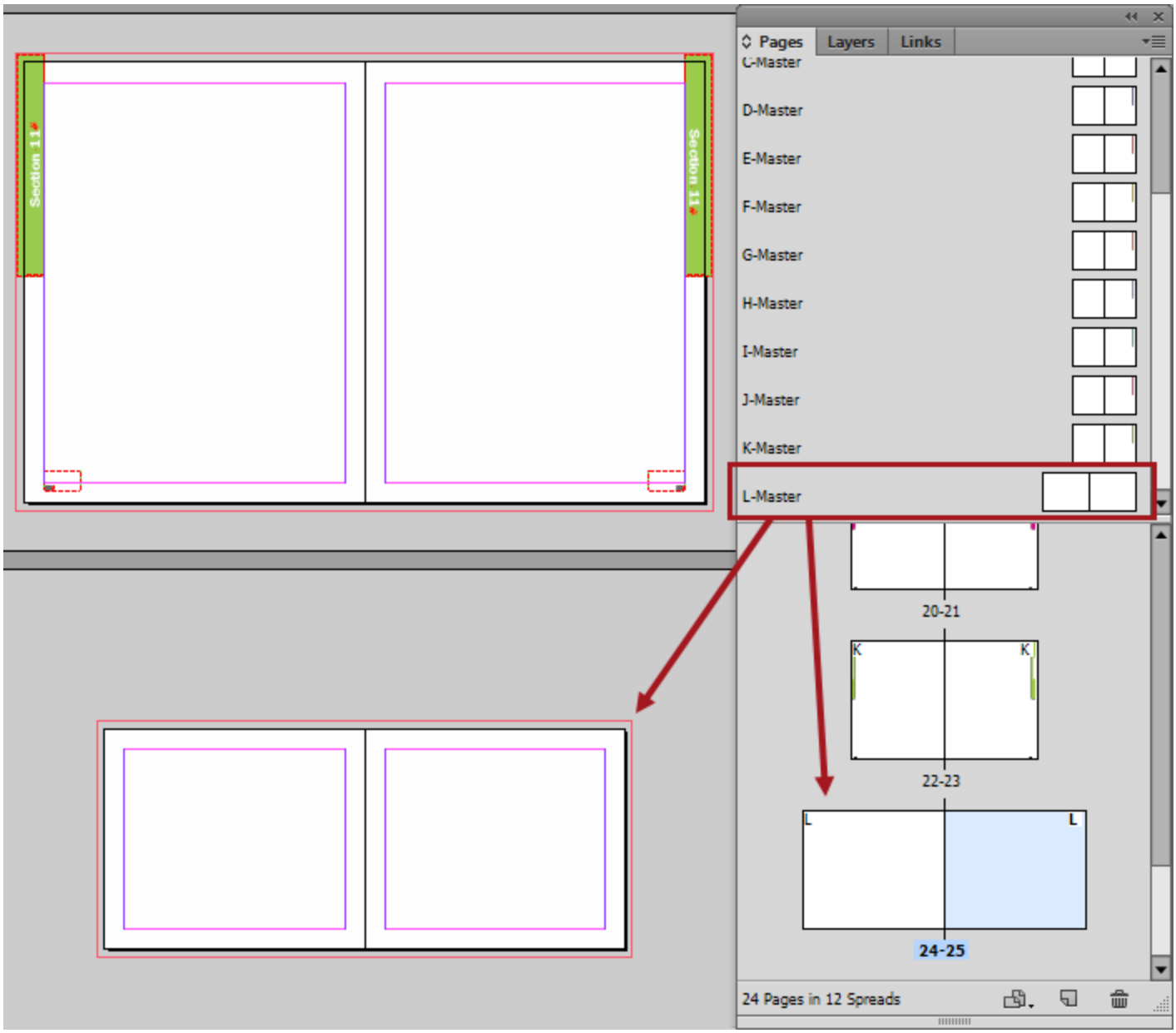
Master Pages of Different Sizes

Sometimes a publication may need one or more master pages that are a different page size than the rest of the catalog. For example, you may need a smaller page size to create an order form or advertising insert. Since more than one publication template cannot be used for an entire publication, this different page size is handled by creating a new master page within the publication template.

A master page of a different size is created the same way as any other master page, except it is given a different page size on the New Master dialog.



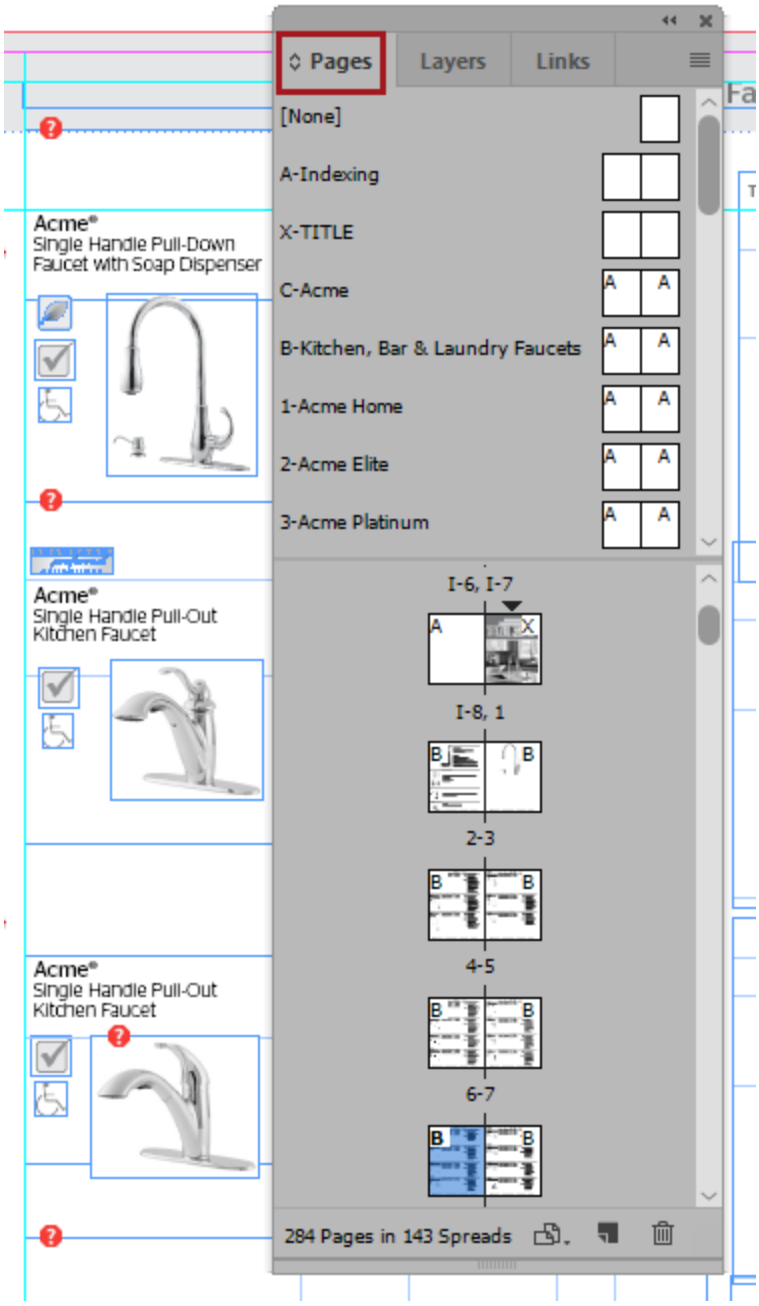
The following screenshot shows how a page created from a master page of a different page size looks alongside the other pages in the template. The InDesign **Pages** panel is on the right and the page spreads (viewed at a zoom level of 25%) are on the left.



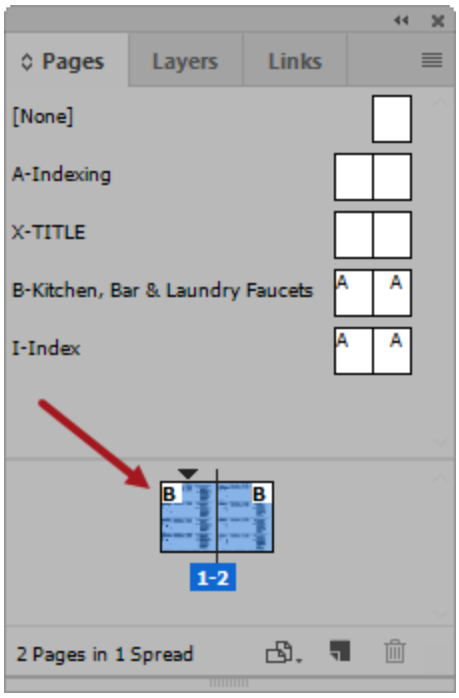
Creating a Publication Template From an Existing Document

In many instances, a sample InDesign document will be provided (typically by a customer) before the template-building process begins. Creating a publication template from a finished sample document is a relatively straightforward process. Re-using a sample document in this manner removes much of the guesswork in setting up the size of the pages and margins, the required paragraph and character styles, color swatches, and so forth. Creating a template from a preexisting sample ensures that a publication created in STEP will look exactly like the publication as it was created previously, outside of STEP. For this method, follow these steps:

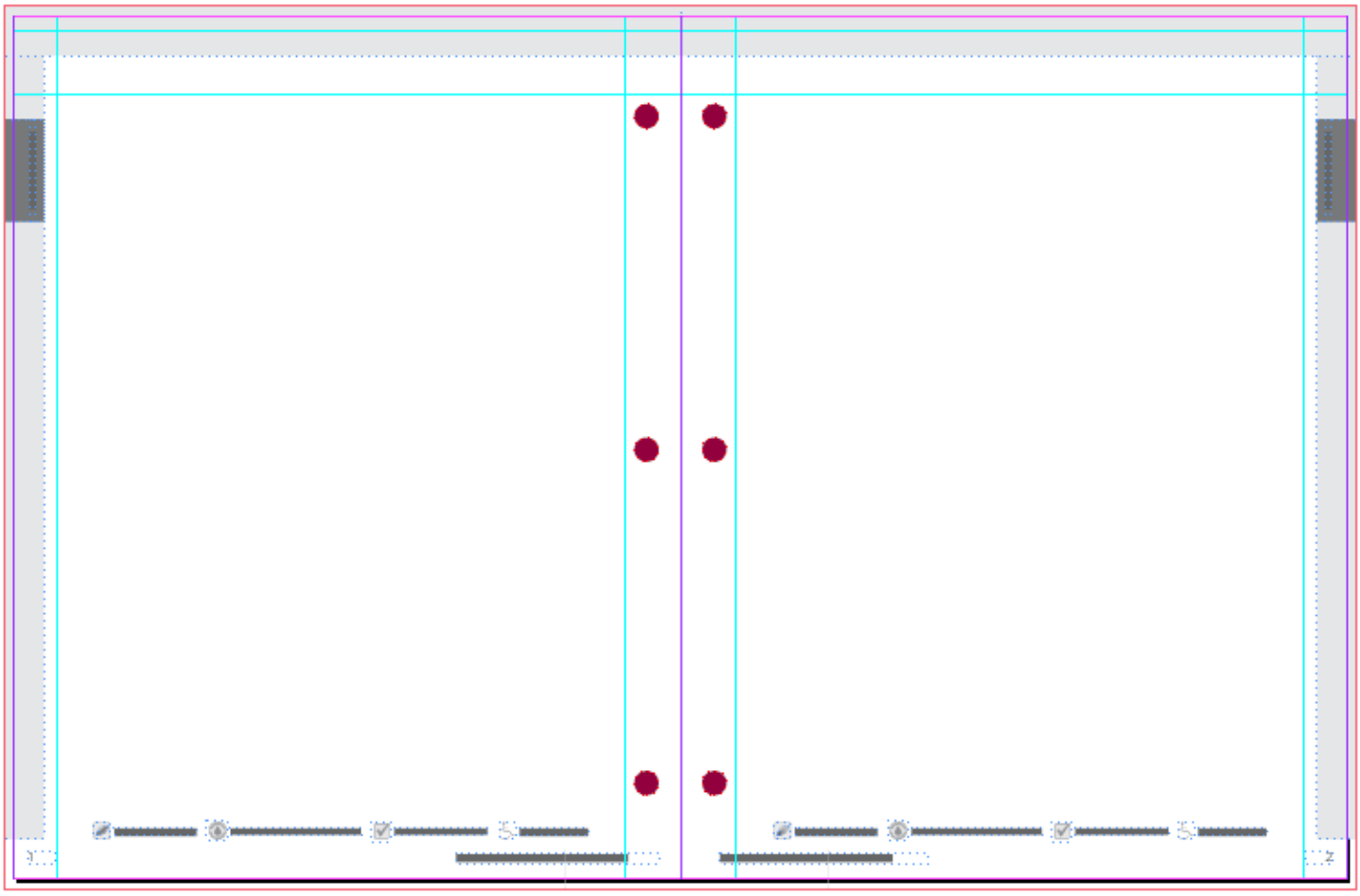
1. Open the sample InDesign document.
2. Open the **Pages** panel by navigating to Window > Pages (or pressing F12).



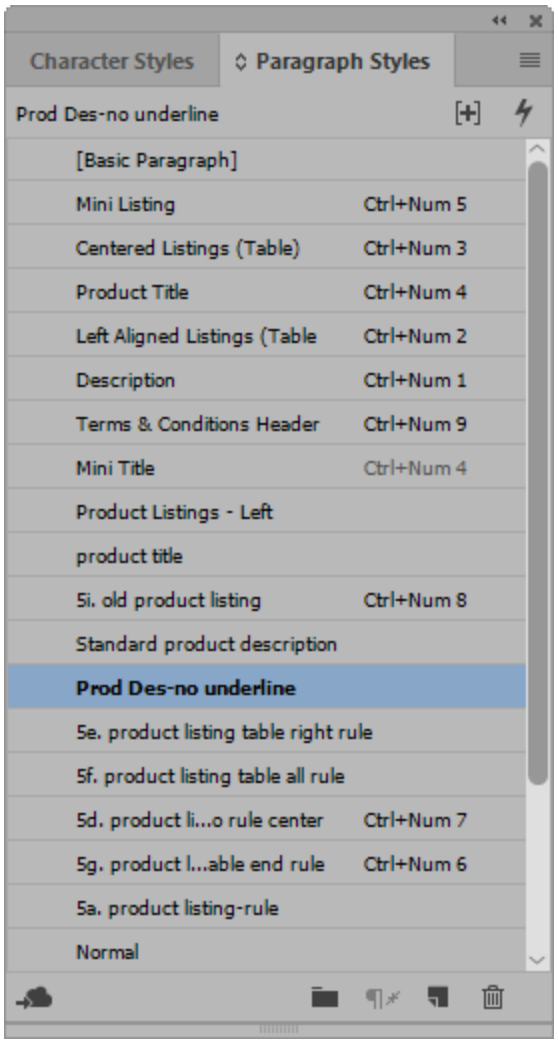
3. In the **Pages** panel, delete all pages and master pages that are not needed. If the publication template will only be used for simple proof views in STEP, then only one master page and one page spread needs to remain. If you are using the AutoPage or Flatplanner component and need to map publication sections to master spreads through pagination rules, then you may need to retain most or all of the master pages in the document. For more information, see the 'Set publication template spread index' section of the **AutoPage Pagination Rule Actions** topic in the **AutoPage** documentation and the **Flatplanner Pagination Rule Actions** topic in the **Flatplanner** documentation. For information on proof views, see the **Proof View** section of this guide.
4. Next, select the page(s) at the bottom of the Pages panel.



5. Using the InDesign selection tool, click anywhere on the InDesign page and press Ctrl+A to select all elements on the page(s), or, go to Edit > **Select all** in the InDesign menu. Then, press the Delete key to remove all elements.
6. The resulting blank document will still contain all elements from the master page such as page numbers, side tabs, and other background graphics.



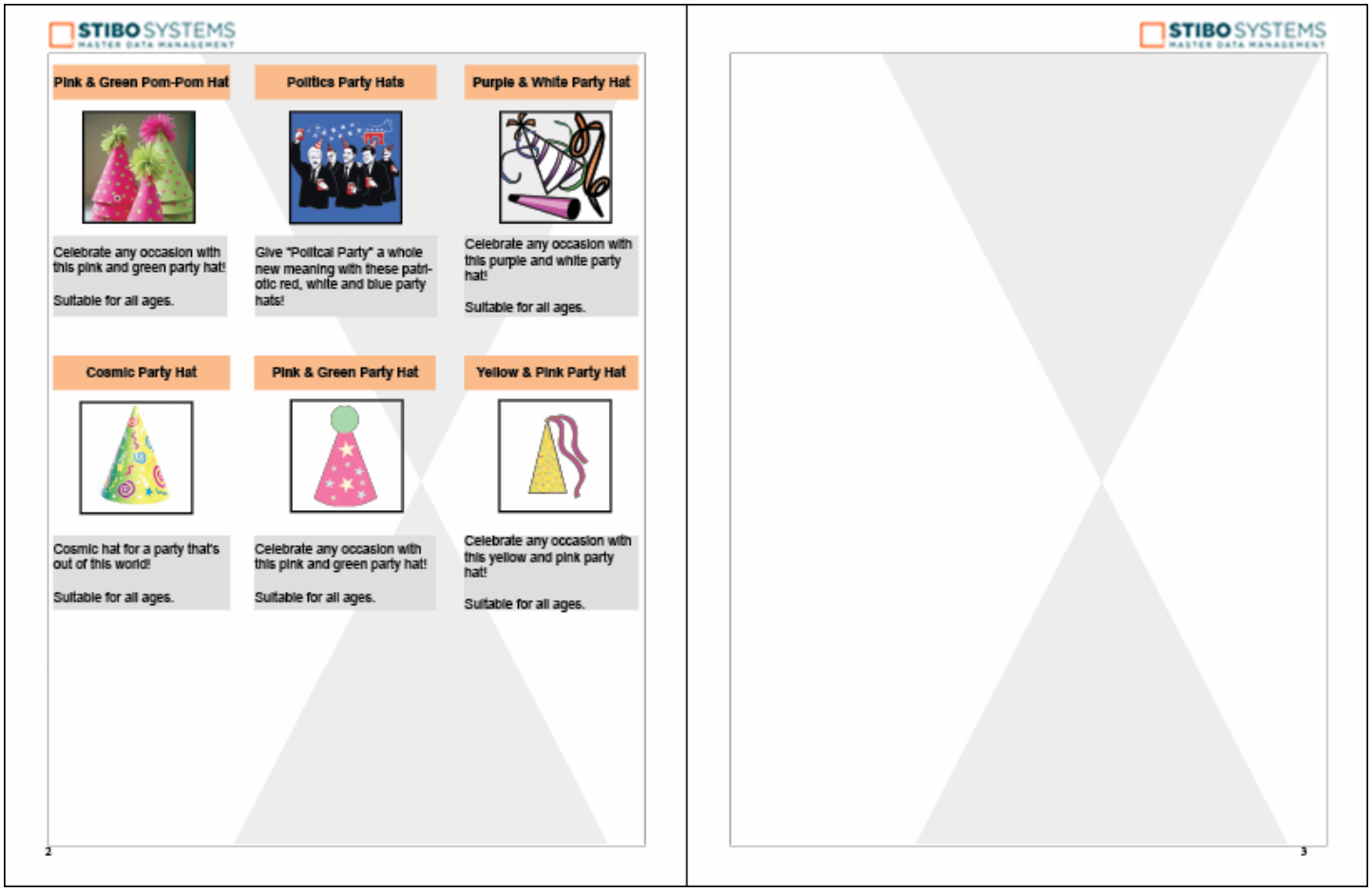
In addition, all paragraph and character styles will remain.


Character Styles
Paragraph Styles
Prod Des-no underline
[Basic Paragraph]
Mini Listing Ctrl+Num 5
Centered Listings (Table) Ctrl+Num 3
Product Title Ctrl+Num 4
Left Aligned Listings (Table Ctrl+Num 2
Description Ctrl+Num 1
Terms & Conditions Header Ctrl+Num 9
Mini Title Ctrl+Num 4
Product Listings - Left
product title
5i. old product listing Ctrl+Num 8
Standard product description
Prod Des-no underline
5e. product listing table right rule
5f. product listing table all rule
5d. product li...o rule center Ctrl+Num 7
5g. product l...able end rule Ctrl+Num 6
5a. product listing-rule
Normal

Publication Template Layout, Formatting, and Styles

Publication templates contain the 'background' graphics of the pages that are used in a publication. The below screenshot shows an example of a publication template page spread with products mounted onto the left page and no products on the right page. The background graphics, headers, page numbers, and so forth are driven by the publication template. The object layouts are driven by the product template.

As with product templates, the graphical formatting of a publication template is completely up to the user—background graphics, colors, fonts, and other design elements are not functions of STEP Publisher. However, certain considerations need to be made with regard to how publication templates work together with STEP Publisher product templates and how graphical elements (such as textual styling that is driven by InDesign paragraph and character styles) work along with corresponding configurations in STEP.



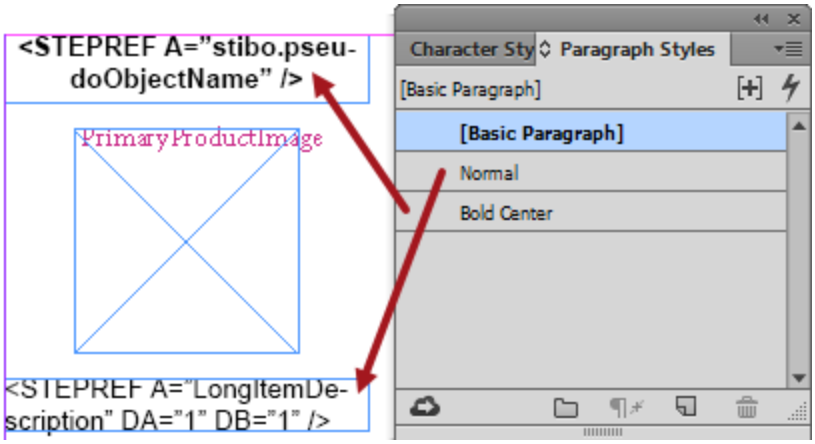
This topic focuses on the following subjects specific to configuring a publication template for use with STEP Publisher:

- Defining and configuring InDesign **paragraph styles**
- Defining and configuring InDesign **character styles**
- Loading styles from other templates (such as product templates or other publication templates)
- Defining and configuring InDesign **swatches**

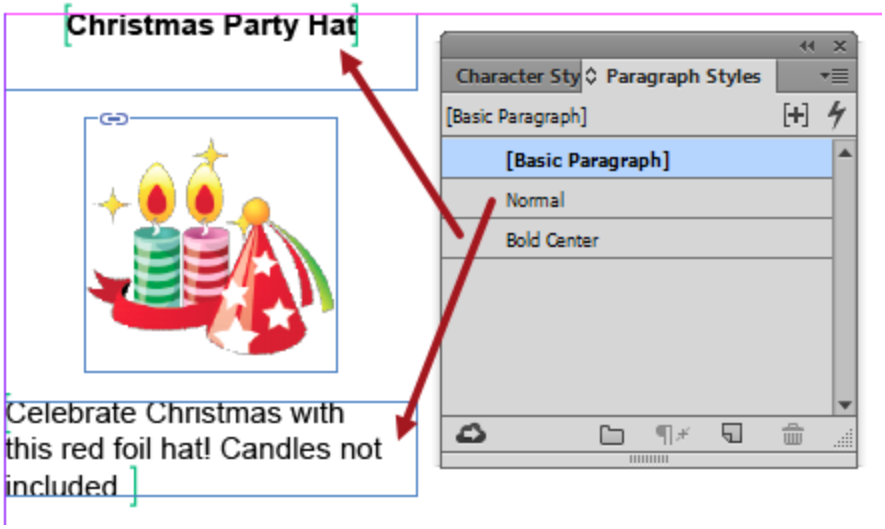
Paragraph Styles in Publication Templates

Paragraph styles are used in publication templates in order to keep text styles consistent throughout a publication. They are also required to apply text styles to mounted **STEP tables**, but instructions on how to configure paragraph styles for STEP tables are not covered in this topic. For more information, see **Configuring Table Styles in Publication Templates** in the **Tables** documentation.

The following screenshots show the application of standard InDesign paragraph styles to text on a **product template**. These identical styles should be contained within the **publication template** in order to globally manage styles throughout the publication.

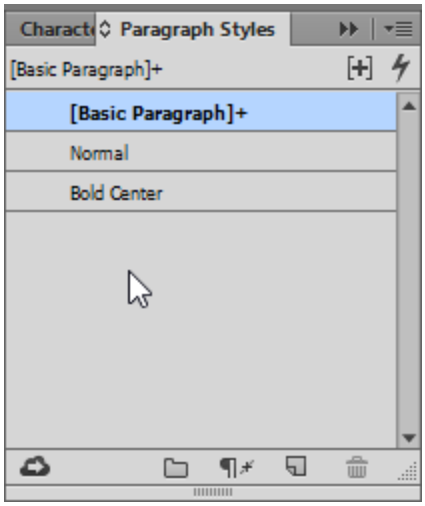


The following screenshot shows how a product mounted using this product template looks on a **publication** template containing the same styles.



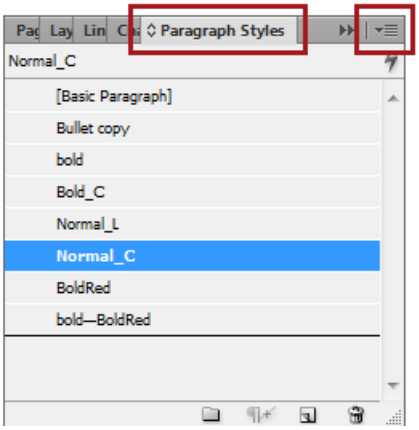
Note: Recommended practice is for publication templates to contain the identical paragraph styles that are used in the product templates associated with the publication. It is possible to mount styled pages without using paragraph styles, but this is not recommended because you will not be able to globally manage the styles throughout the publication.

If your styles are only defined in the product template but not the publication template, the styles will not be imported into the publication template; instead, they will be defined as **[Basic Paragraph]+**.

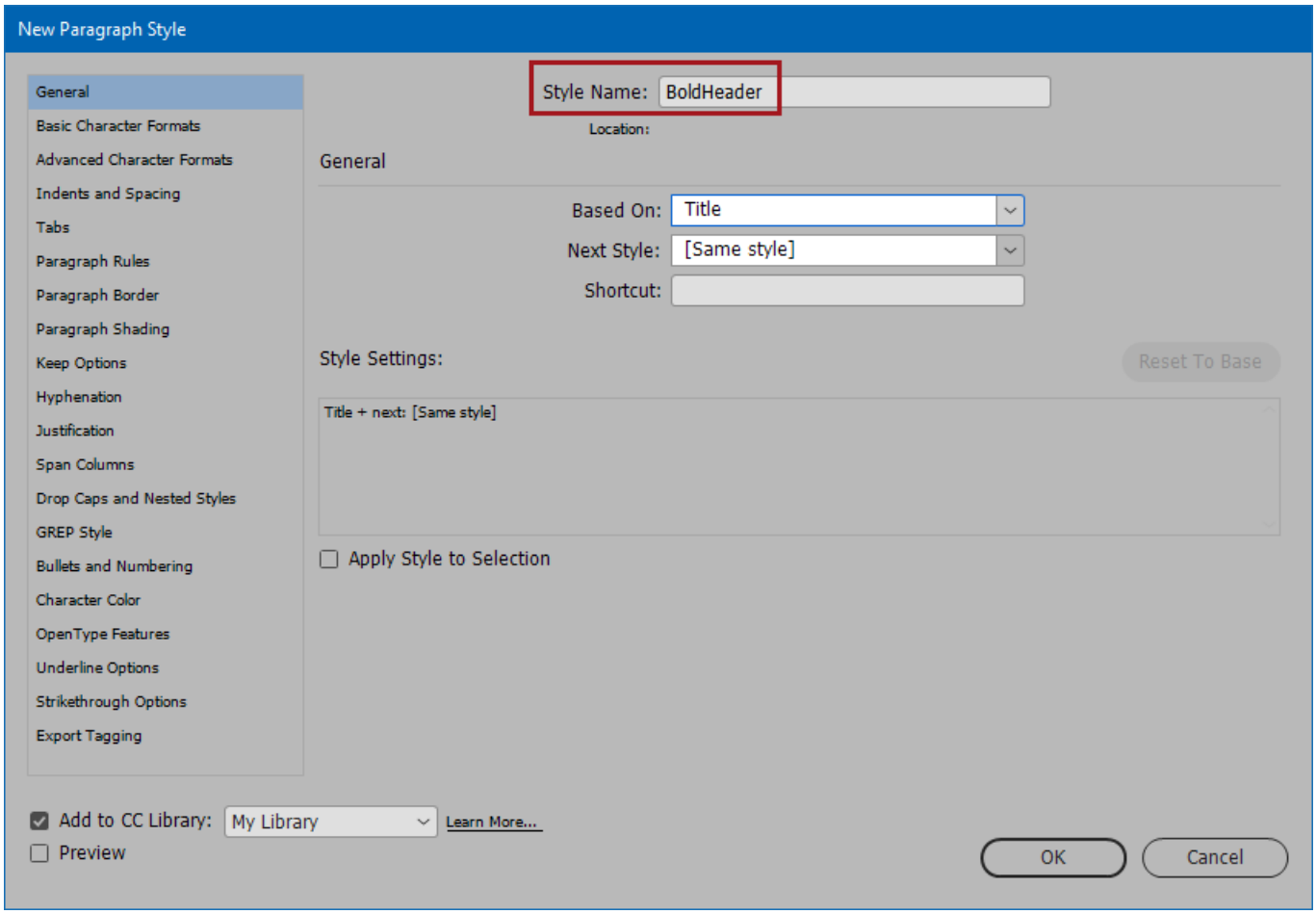


Creating a Paragraph Style in InDesign

1. In InDesign, navigate to Window > Styles > **Paragraph Styles** (or press F11). The **Paragraph Styles** panel displays.



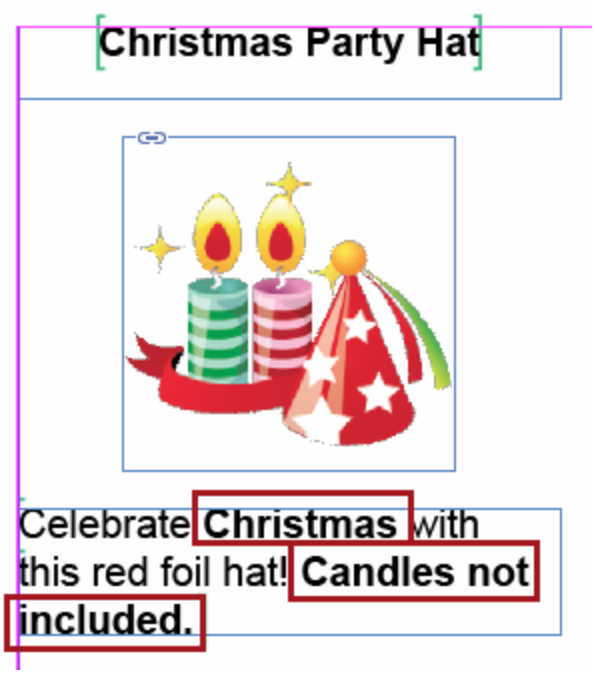
2. Click the **Options** menu in the upper right corner of the Paragraph Styles panel, then click **New Paragraph Style**.
3. On the **New Paragraph Style** dialog, enter a style name, then click **OK** to create the style.



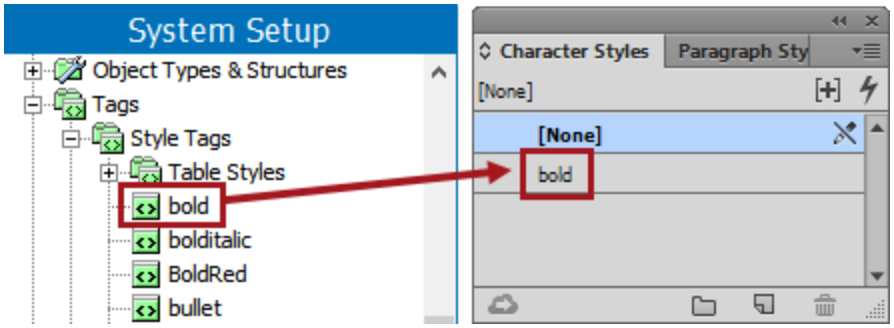
Character Styles in Publication Templates

InDesign **character styles** are used in conjunction with STEP **style tags** to apply formatting to characters embedded *within* paragraph styles. For example, a STEP style tag can be used with a corresponding InDesign character style to bold a single word inside of a non-bold sentence.

The following screenshot shows the **bold** character style applied to certain words embedded within a paragraph style.



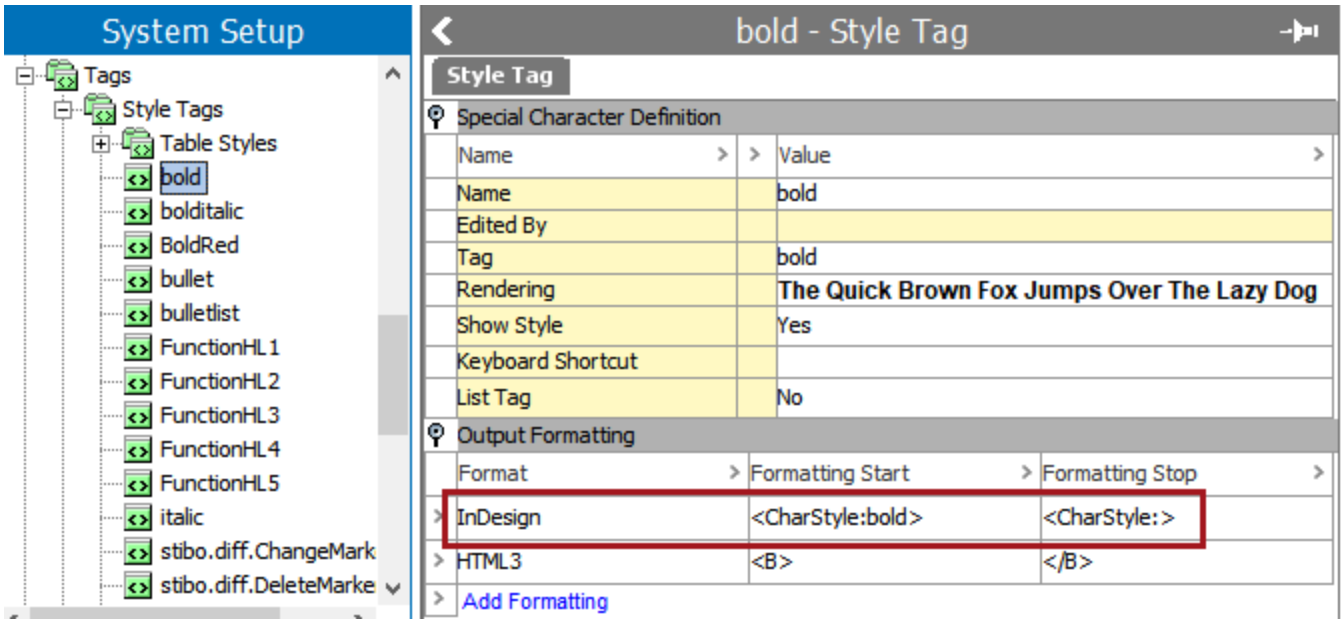
This is picked up from the bold **style tag** created in STEP (left) and applied with the bold **character style** in InDesign (right)



Note: STEP style tags are case-sensitive; therefore, the name of the style tag in STEP and the character style in InDesign must match exactly.

InDesign Output Formatting in STEP Style Tags

A STEP style tag that is intended for InDesign output must contain a valid InDesign tag code in the **output formatting** field of the tag. The following screenshot shows the InDesign tag <CharStyle> applied to the tag. The word 'bold' contained within the <CharStyle:bold> tag corresponds to the 'bold' character style in InDesign.



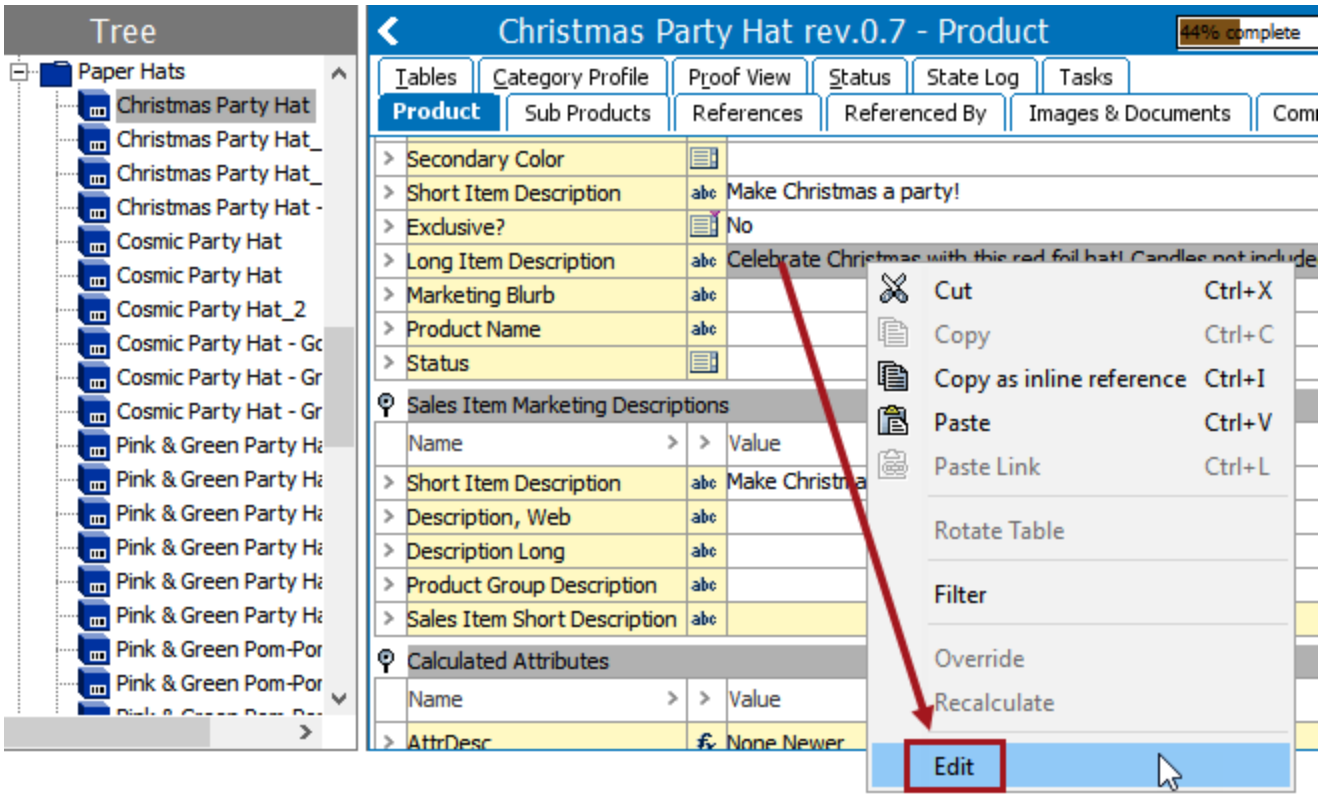
For instructions on how to create and configure style tags in the STEP Workbench, see **Creating Tags** in the **System Setup / Super User Guide** documentation.

More information about Adobe InDesign tagged text, including the tags that are used for output formatting, can be found on the web.

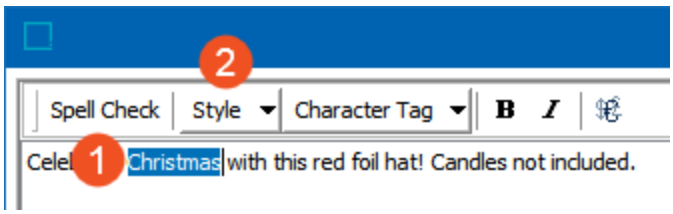
Applying the Character Style in STEP

To apply this style in STEP, follow these steps, which use a product object for the example.

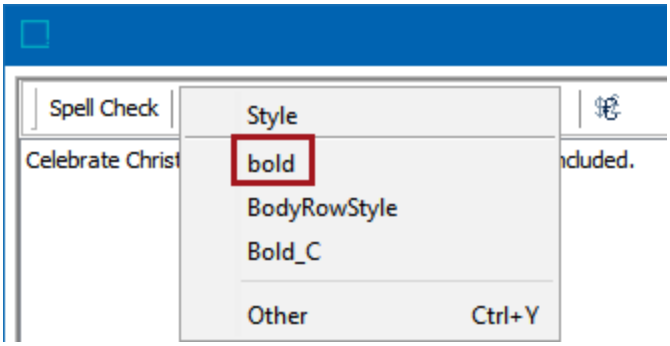
1. On the **Product** tab, navigate to the attribute value that you want to edit and select the attribute value field.
2. Right-click and select **Edit** to open the large value editor for the cell.



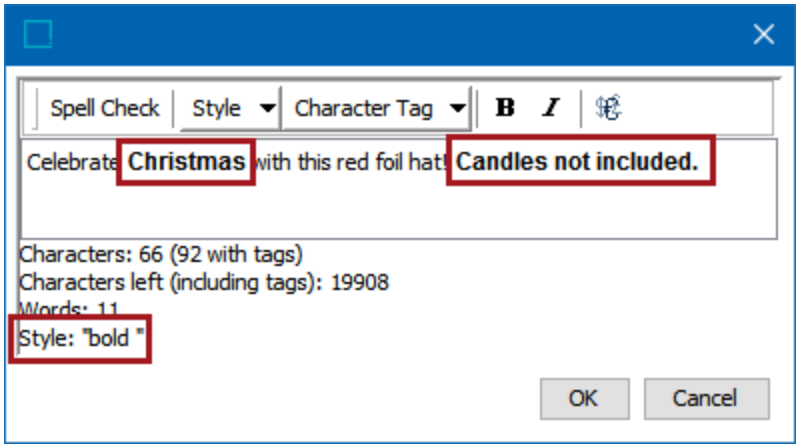
3. In the value editor, highlight the word(s) to which you would like to apply a style, then click the **Style** button.



4. In the **Style** dropdown menu, choose the style that you would like to apply. For this example, the **bold** style is used.



5. The style is applied to the word(s).



6. The product will mount as pictured in the first screenshot in this section.

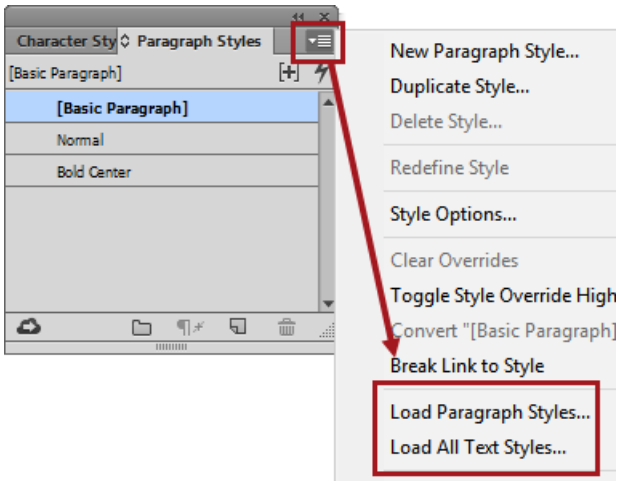
Note: Style tags are not created in STEP for InDesign *paragraph* styles used in standard text frames. STEP style tags are only used with InDesign *character styles* and for text that appears within STEP tables. See the **Configuring Table Styles in Publication Templates** topic for more information.

Loading Text Styles From Another Template

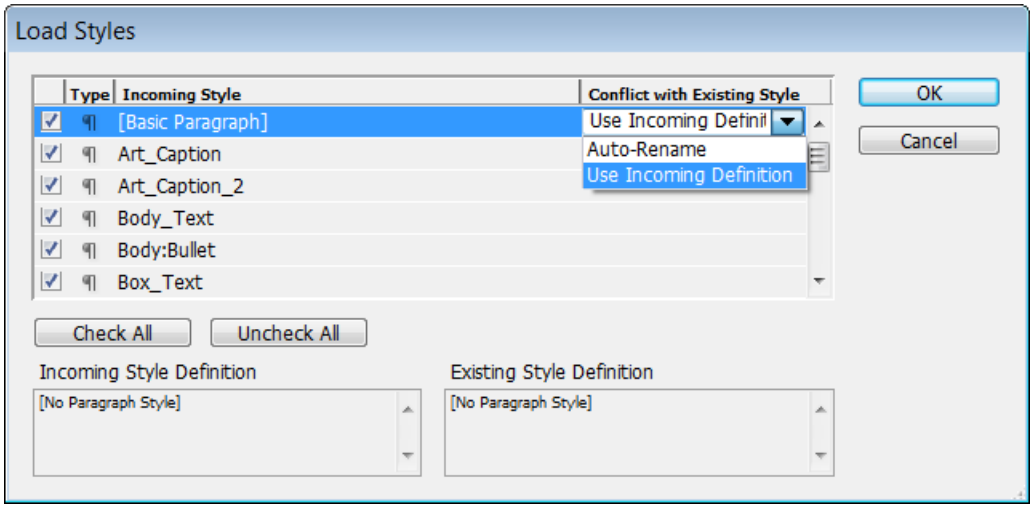
If paragraph styles have already been defined in another InDesign document, these styles may be imported from the other document in order to save time when setting up your publication template. The other InDesign document does not need to be a publication template that was created using STEP Publisher; it can be any InDesign document.

To load text styles from another InDesign document:

1. In InDesign, navigate to Window > Styles > **Paragraph Styles** (or press F11) to open the **Paragraph Styles** panel.
2. Click the **Options** menu in the upper right corner of the **Paragraph Styles** panel, then click **Load Paragraph Styles**. If you would like to load both Paragraph and Character styles from the other InDesign document, select **Load All Text Styles**.



3. In the **Open a File** dialog that displays, navigate to the InDesign document that contains the styles that you would like to import, then click **Open**.
4. In the **Load Styles** dialog, select the styles that you want to load. By default, all styles are selected. Use the **Check All** / **Uncheck All** buttons depending on your needs.



5. If an incoming style conflicts with an existing style (meaning that an incoming and an existing style both have the same name), text will appear in the **Conflict with Existing Style** column.

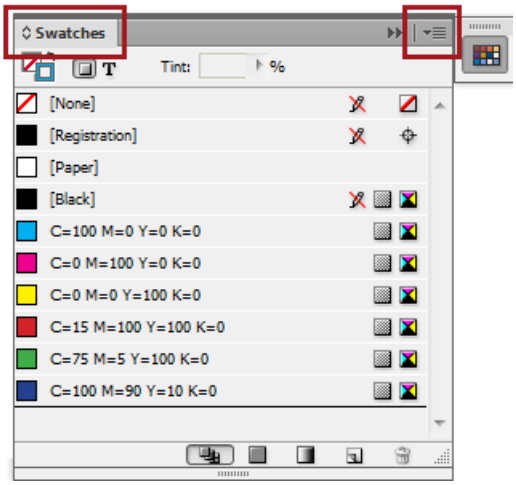
   Choose **Auto-Rename** from the dropdown if you do not want to overwrite the existing style. Choose **Use Incoming Definition** if you want to overwrite the existing style and use the imported style.

6. Click **OK**.
7. Repeat these steps to load styles from other documents to the publication template.

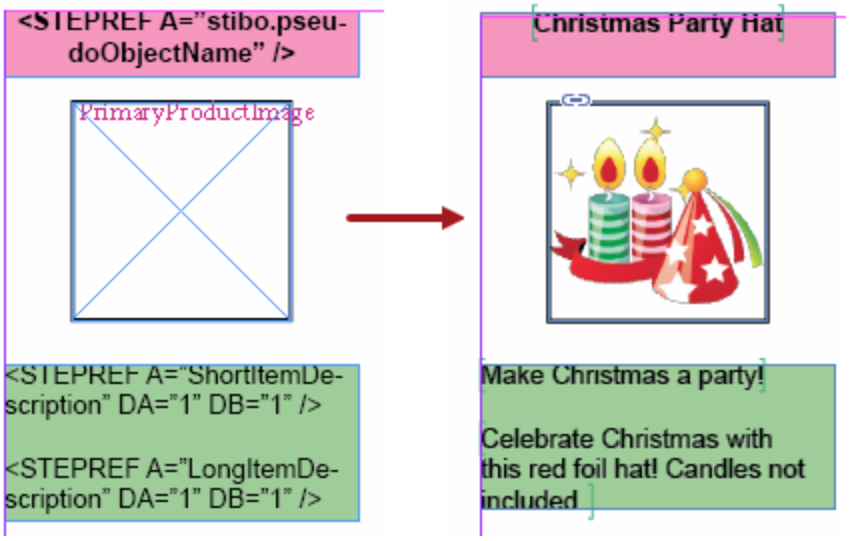
Swatches in Publication Templates

Swatches are used in both publication templates and product templates to add color shading to frames and frame borders, but their primary use is for applying colors to mounted **STEP tables**. It is recommended practice to have the same swatches in both your publication template and product templates.

Note: Swatches are mandatory in the publication template if mounting STEP tables. See the **Configuring Table Styles in Publication Templates** topic for more information.



The following screenshot shows a 'before and after' of a product mounted using a product template that employs swatches to add color fill to the text frames and a border to the image frame.



Swatches are optional in publication templates *unless tables are being mounted*. If you mount a product using a product template that has swatches but a publication template that does *not* have swatches, the swatches will be added to the publication template when the product is mounted.

Storing and Editing Publication Templates

After creating your publication templates, you need to save them in the STEP Workbench and, in order to use them to build pages from within your InDesign client, on your local computer.

Storing Publication Templates Locally

Publication templates must be saved locally (on your own hard drive or other locally accessible file location) before they can be used to mount products from within InDesign using standard 'drag and drop' functionality. Save the templates as standard InDesign (.indd) files to a directory or folder on your machine.

Storing Publication Templates in STEP

Publication templates must be saved to STEP for the following reasons:

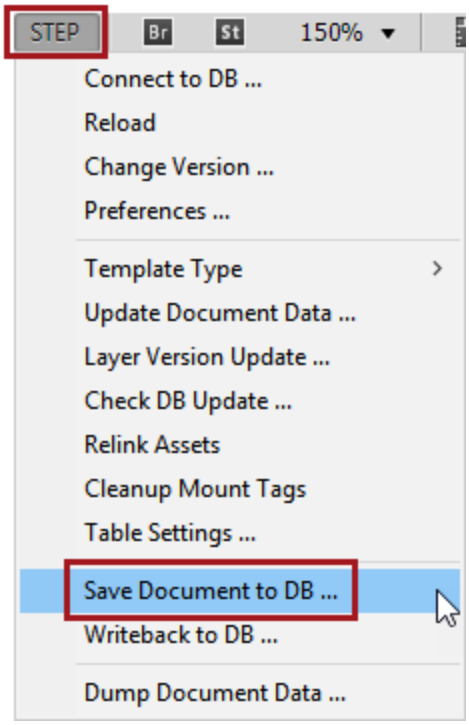
- At least one publication template must exist in STEP in order to create a publication. (The exception to this is if you create a publication by using a Publication Excel import. However, the publication cannot be used until a publication template is linked to it, as the Publication Excel import merely creates the publication *structure*. See **Importing Publications in Excel** for more information.)
- Templates stored in STEP can be opened and edited by any user who has access to the same STEP environment, in essence treating STEP as a 'cloud' storage solution.
- Publication templates must be stored in STEP in order to utilize Proof View functionality. See the **Proof View** section of this guide for more information.
- Publication templates must be stored in STEP in order to use the Flatplanner and AutoPage components.
- Publication templates must be stored in STEP in order to create Flatplanner **page templates** in the workbench.

To store a publication template in STEP:

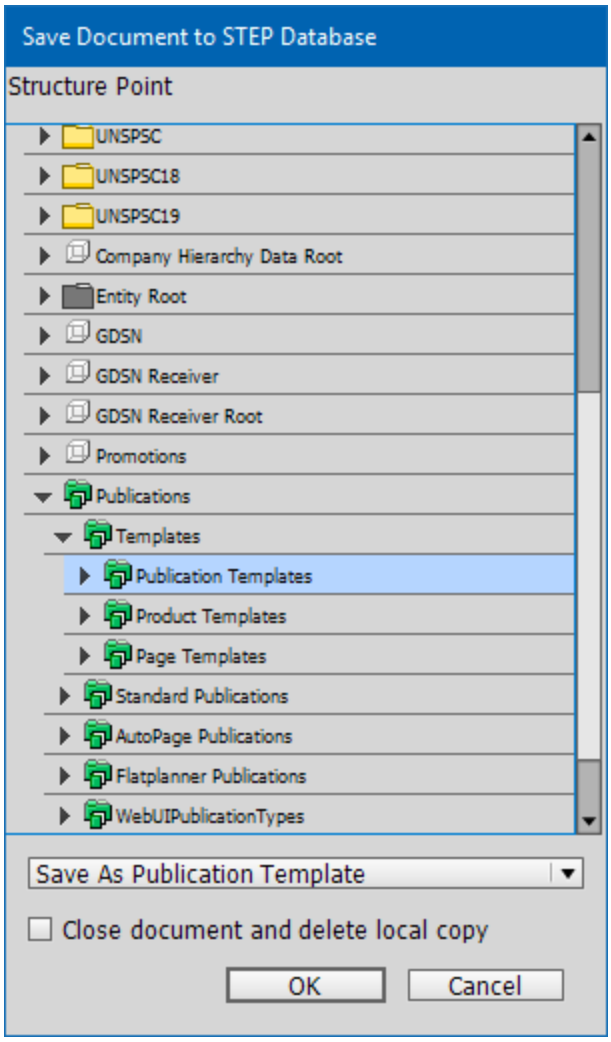
1. Save the publication template on your local hard drive as a standard InDesign file.

   Note: STEP will not let you save a template to the workbench unless it is first saved locally. However, once the template is saved in STEP, you may delete the local file if you do not plan on using it later for drag-and-drop page mounting.

2. Click on STEP > **Save Document to DB ...**.



3. The **Save Document to STEP Database** dialog displays.



4. Select the publication group where you would like to save the template.

   Note: Templates can only be saved to publication group folders; they cannot be saved into publications or section folders.

   Determining which publication group to save your publication templates into is a matter of user preference. Common choices are to save all publication templates in a publication group that is devoted solely to publication templates, or to save publication templates in a publication group along with their associated publication(s).

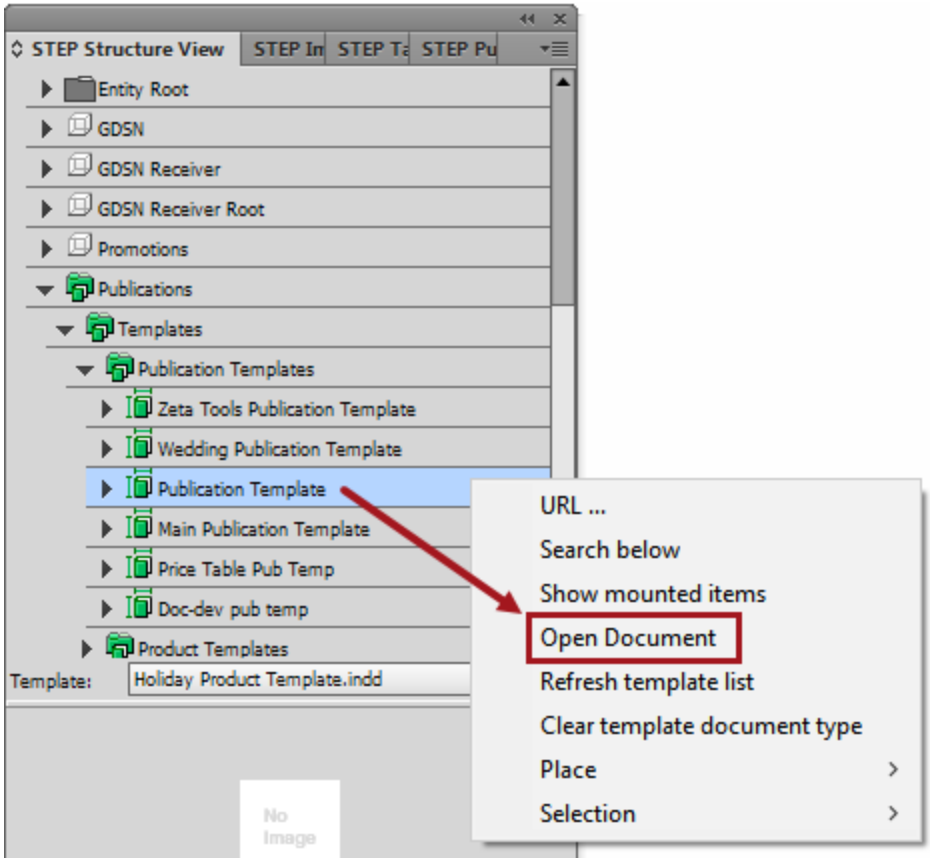
5. Choose **Save as Publication Template** from the dropdown list near the bottom of the dialog.
6. Check the **Close document and delete local copy** box to delete the local copy of your template once you save it to STEP.
7. Click **OK**. The publication template is saved in STEP.

Opening and Editing Publication Templates

If a publication template needs to be altered after it is saved to STEP, it must be opened from the **STEP Structure View** panel within InDesign. This is to ensure that your system recognizes the template as the original file, as publication templates previously saved to STEP contain an embedded, 'hidden' STEP ID. If the template is opened from a location on a local drive and saved again to STEP, the original file will not be overwritten—STEP will recognize this template as a new file.

To open and edit a publication template:

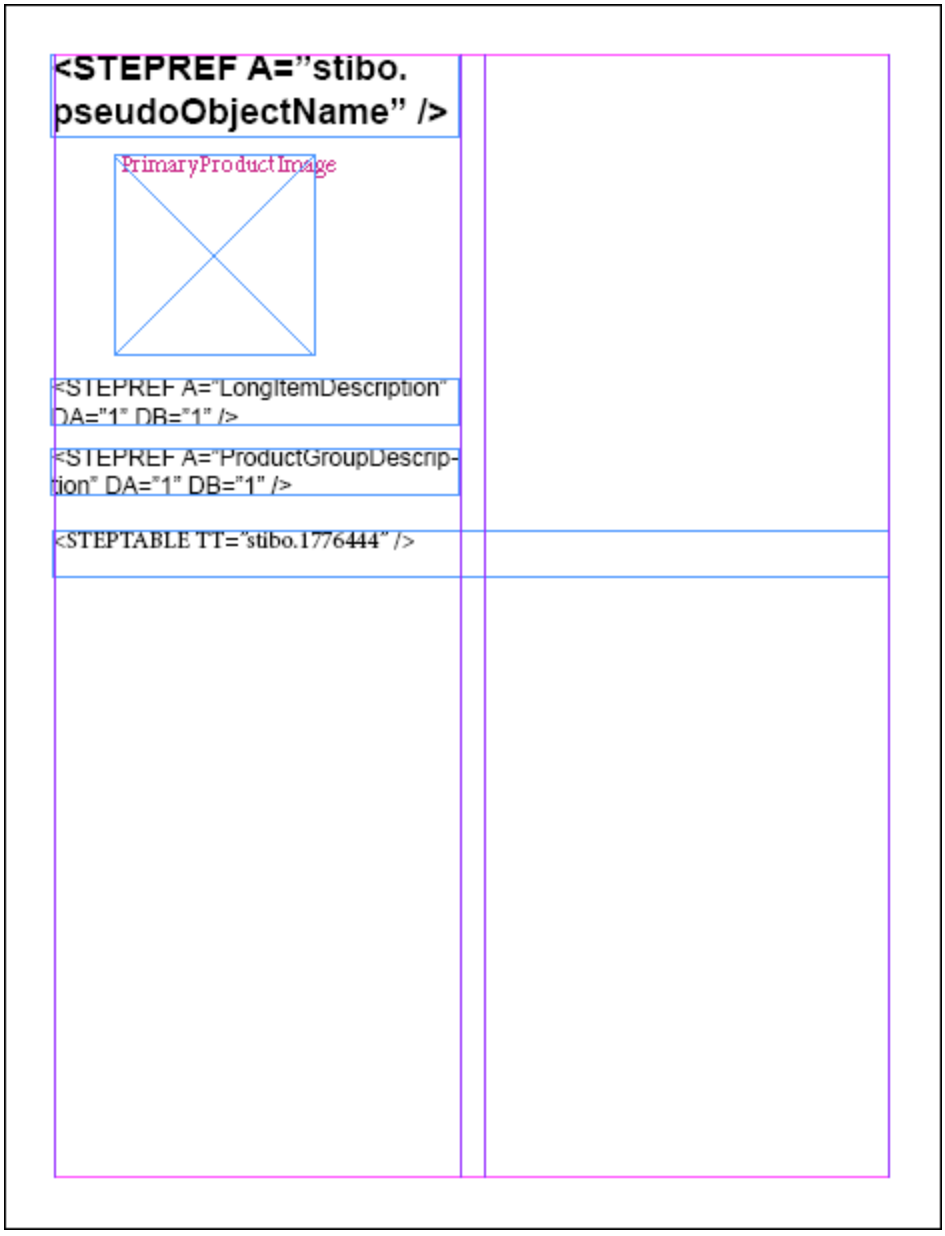
1. Open the **STEP Structure View** panel in InDesign.
2. Browse to or search for the publication template to edit.
3. Right-click on the template and select **Open Document** from the menu.



4. Make the necessary edits to the template, then save it on your local drive. (All templates must first be saved locally before they can be loaded to STEP.)
5. Follow the steps outlined in the previous section of this topic ('Storing Publication Templates in STEP') to save the template back to STEP. Make sure that you save the template back to the same location from which it was opened.
6. The updated template will overwrite the previous document on STEP and will not need to be relinked to any publications or products.

Product Templates

STEP'n'design enables users to mount predetermined product presentations directly to InDesign pages using **product templates**. Product templates are normal InDesign documents (.indd) that are used along with STEP Publisher (and the associated STEP Publisher components Flatplanner and AutoPage) to roughly plan the layout of finalized InDesign pages and organize the STEP attributes, assets, tables, and additional stylistic elements that comprise these product presentations.



Advantages of Using Product Templates

Product templates are used with all STEP Publisher components —STEP Publisher ('drag and drop'), Flatplanner, and AutoPage. The advantages of using product templates to build pages in InDesign include:

- Control over the positioning of individual elements on pages—such as text frames, image frames, and tables—which reduces the time needed to build pages while simultaneously ensuring accuracy and style consistency
- The ability to place ('mount,' in STEP Publisher terminology) one or several objects directly onto the page in one operation
- Predetermination of which attributes, attribute groups, and asset references (typically images) are part of the product presentation
- Predefined product presentations in terms of fonts, styles, colors, table rule lines, and so forth through the application of InDesign paragraph styles, character styles, swatches, and STEP table settings to frames and frame contents
- 'Create once, use many'—product templates can be created once but used over and over, which greatly streamlines production when a publication contains hundreds of pages with identical layouts
- Templates can be easily created, maintained, and reused by designers

Note: Pages can be built in STEP Publisher without product templates, but this is uncommon. Without a product template, data can only be mounted onto pages one attribute / asset reference at a time, and the page layout is not predetermined. Due to these limitations, it is strongly recommended to use product templates. Use cases do exist, however, for 'one-off' mounting of attributes and/or assets to InDesign pages. See the **Mounting Products** topic for more information.

Topics Covered in this Documentation Section

This documentation section addresses the following product template topics:

- Creating a product template
- Configuring text, image, and grouped elements on templates with STEPXML tagging
- Product template layout, formatting, and styles
- Storing and editing product templates
- Creating a 'table of contents' product template
- Converting a preexisting sample document into a product template

The following topics also involve product templates but are not covered in this documentation section:

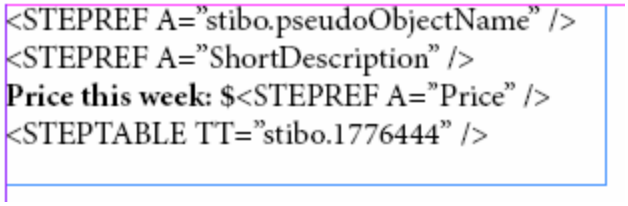
- **Creating Layers in Product Templates:** See the **Working With Version Layers** topic for more information.
- **Galley product templates:** See the **Galley Product Templates** section of the **Flatplanner** documentation for more information.

Note: Though objects other than product objects can be mounted onto InDesign pages from STEP (including classification folders, entities, and green publication hierarchy objects themselves), the subtopics in this documentation will refer to InDesign page layouts as 'product presentations' and objects to be mounted as 'products'. This is to streamline the language used in presenting this information.

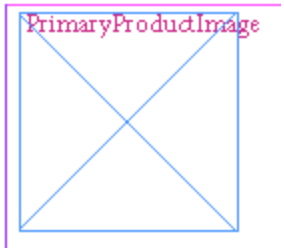
Creating a Product Template

STEP Publisher product templates start out just like any other InDesign document—a blank .indd file. They become product templates after **frames** (text, image, and sometimes grouped frames) are added to the page, and these frames are configured using the STEP-specific features made available in InDesign through the STEP'n'design plugin.

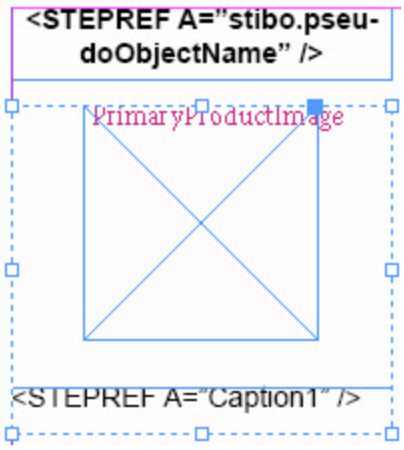
Product template **text** frames contain STEPXML tags that can mount information from attributes, 'object properties' such as STEP ID or name, commercial terms list values, and tables.



Product template **image** frames are also tagged with STEPXML and will mount referenced assets (typically images, though sometimes PDFs) from products.



Product template **grouped** frames typically contain a mixture of text and image frames. One use for grouped frames is to mount metadata attributes that appear on reference links, such as image captions that should always be presented with the image frame.



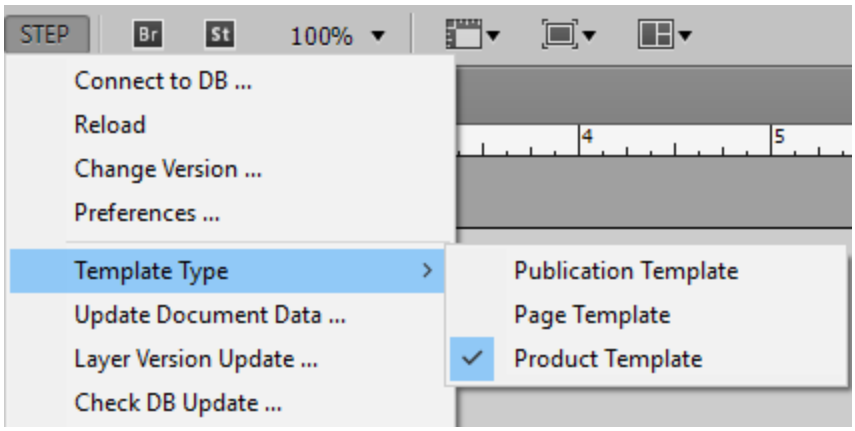
The general method for creating a new product template is as follows:

1. Create a new InDesign document
2. Place text frames and/or image frames onto the document
3. Determine which STEP elements (such as attributes or images) should be in the template and reference their associated STEPXML tags to the frames by using the STEP template panels (STEP Template Content and STEP Template Frame)
4. Apply styles to the frames such as paragraph / character styles, frame borders, color swatches, and so forth
5. Apply additional parameters to the frames and their contents from the STEP template panels, such as image scaling, automatic frame resizing, and automatic text deletion for empty attributes

The following subtopics in this documentation section describe how to create a product template from scratch. For information on how to convert a preexisting sample document into a product template, see **Converting a Sample Document into a Product Template**.

Create the Document and Designate the Template Type

1. Create a new document in InDesign by navigating to File > New > **Document** or typing Ctrl+N.
2. Next, designate your blank InDesign document as a product template. With your blank InDesign document open, Navigate to STEP > **Template Type**.
3. Select **Product Template** from the STEP menu.

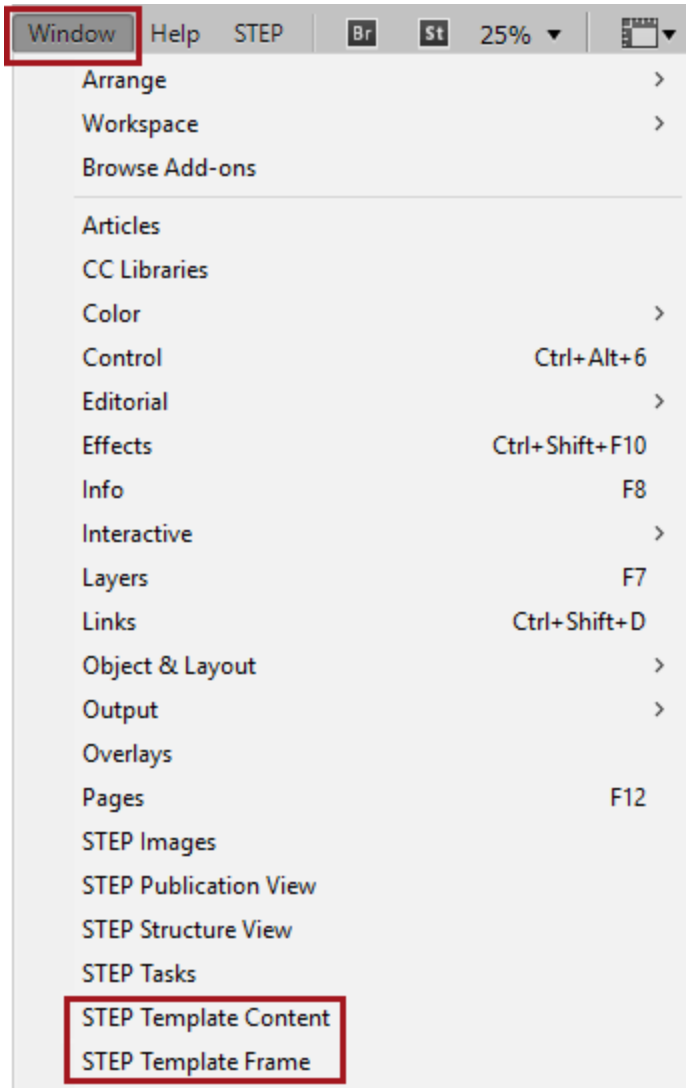


Open the STEP Template Panels

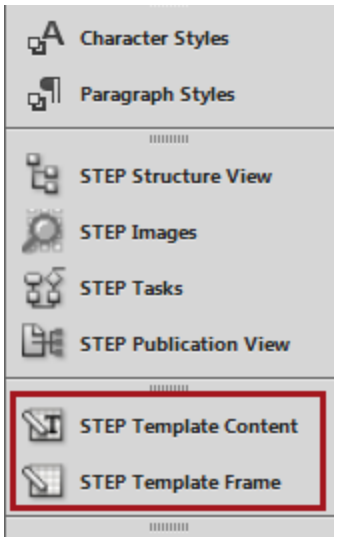
Two STEP panels (also referred to as *panels* in various locations throughout this guide) are used to create product templates from your blank document: **STEP Template Content** and **STEP Template Frame**.

To open these panels (it does not matter in which order the panels are opened):

1. Navigate to the **Window** menu in InDesign
2. Choose **STEP Template Content**.
3. Return to the Window menu, then choose **STEP Template Frame**.



4. The panels should now display in the section of your InDesign interface where you keep your panels docked.


Character Styles
Paragraph Styles
STEP Structure View
STEP Images
STEP Tasks
STEP Publication View
STEP Template Content
STEP Template Frame

Text Frames in Product Templates

This topic explains the initial creation and configuration of text frames in product templates. There are two methods of creating text frames containing STEPXML textual elements (for example, attribute tags) on a product template. In the first, the element is dragged directly onto the page from the **STEP Template Content** panel, which automatically creates the frame that contains the tag. In the second, the text frame is drawn on the page first, then the tag(s) are added next. Which method to use is a matter of personal preference.

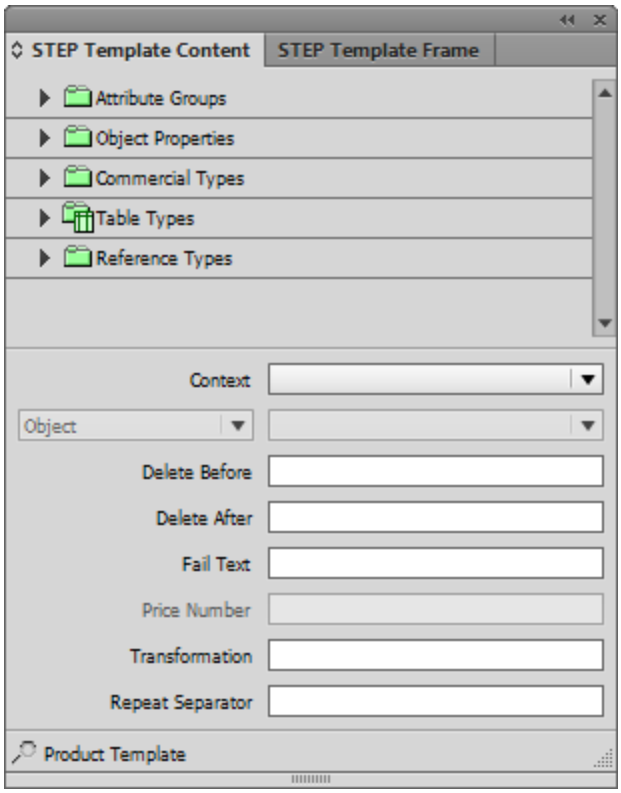
Once the frame has been placed, its size can be edited and additional tags and content can be added to it. Standard practice is to create the frame with the correct width and height for your future output. However, additional configurations can be applied to these frames from the STEP Template Frame panel that will enable them to automatically size to fit the content or allow them to split across column or pages (which is frequently needed for tables and attributes that contain large blocks of text). See the **STEP Template Frame** topic for more information on the frame resizing settings that can be applied to frames.

This topic assumes that you have basic familiarity with the STEP Template Content panel, including how to browse for and navigate to elements contained within its attribute tree. For full details on the options available within this panel, see the **STEP Template Content** topic.

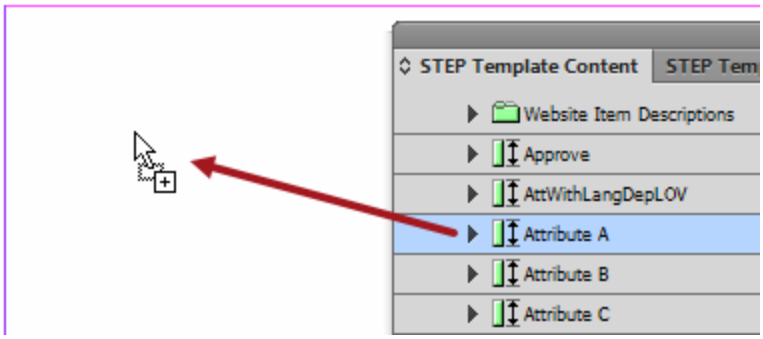
Dragging Elements Directly From the STEP Template Content Panel

Dragging elements from the STEP Template Content panel directly onto the page enables you to simultaneously create the text frame and place the attribute tag (or tag from another element, such as an object property or table type) within the frame at the same time.

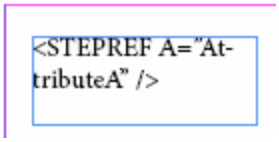
1. Open your product template, then open the **STEP Template Content** panel.



2. Search for or browse to the relevant attribute, attribute group, object property, commercial terms value, or table type in the attribute tree panel of the panel. (Reference type tags are not applied to the inside of text frames, but rather to entire frames. See the next section of this topic, **Image Frames in Product Templates**, for more information.)
3. Using an attribute as an example, select an attribute in the panel tree, and, while holding down the left button on your mouse, drag the attribute onto the product template. Release the mouse button where you would like to drop the frame.



4. A frame is created that contains the STEPXML tag of the selected attribute.

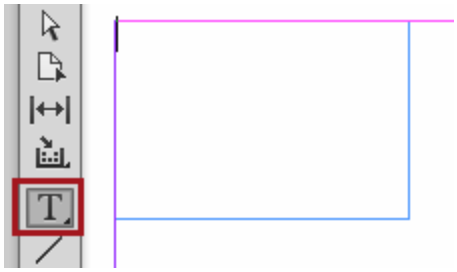


5. Resize and reposition the frame as needed.

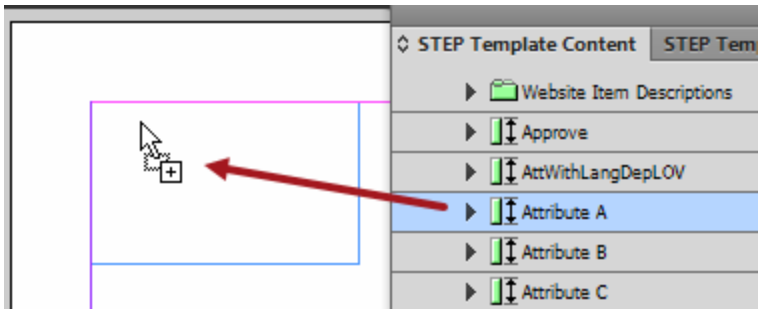
Using the Text Tool to Draw the Frame

This method is similar to the above instructions except the text frame is drawn first.

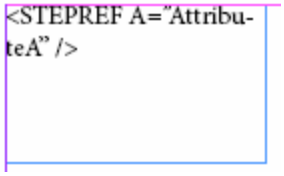
1. Draw a text frame using the Type tool (T).



2. Search for or browse to the relevant attribute, attribute group, object property, commercial terms value, or table type in the attribute tree panel of the panel.
3. Using an attribute as an example, select an attribute in the panel tree, and while holding down the left button on your mouse, drag the attribute into the frame. Release the mouse button when your cursor is inside the boundaries of the frame.



4. The STEPXML tag of the selected attribute appears in the frame.

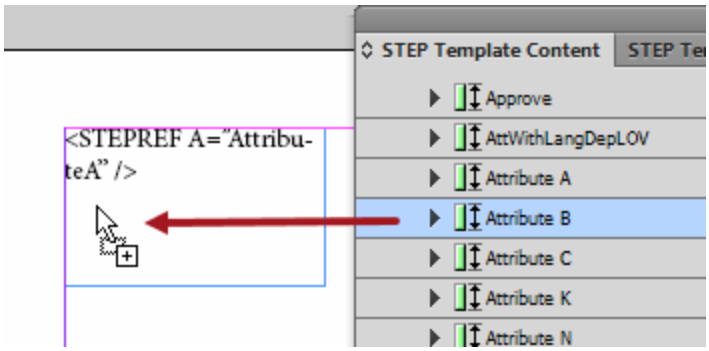


Insert Additional Attributes into Existing Text Frames

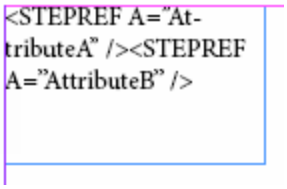
It is common for more than one STEP tag to appear in a frame, and there is no limit on how many tags can be placed into a single frame, since overset text is allowed in the text frame. Auto-sizing features for frames, applied on the STEP Template Frame panel, will ensure that the frame sizes to fit the placed content when your product presentation is mounted.

To add additional STEP tags to your frame:

1. With your template open, search for or browse to the relevant attribute, attribute group, object property, commercial terms value, or table type in the 'attribute' tree panel of the panel.
2. Using an attribute as an example, select an attribute in the panel tree, and, while holding down the left button on your mouse, drag the attribute into the frame. Release the mouse button when your cursor is directly beneath the preceding attribute(s) inside the frame.



3. The second attribute now displays in the frame.



Note: Be careful to not drop a STEPXML tag inside of another one. In a STEP Publisher text frame, a STEP element can exist before or after other elements but not within or overlapping one another. Also, deselect the tag in the text frame, or the tag will be replaced with that of the next element that you select in the attribute tree.

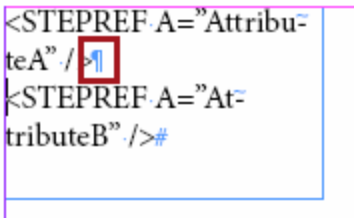
Edit STEP Tags Within a Text Frame

After STEP tags are placed inside frames, it is possible to perform a wide range of modifications and operations to the text frame and the STEPXML tags themselves. These include adding plain text and characters in between the tags and editing the XML tags freehand.

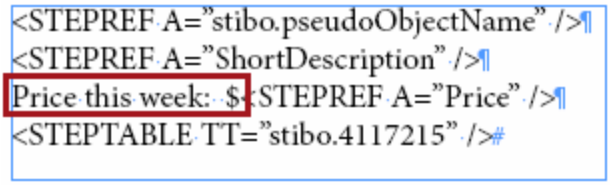
Add Plain Text and Characters Between STEPXML Tags

In the example from the previous section, two STEPXML tags appear directly adjacent to each another with nothing to separate them. To avoid this, you can use the normal editing features of InDesign to add new lines, tabs, or empty lines, as well as plain text such as commas between tags.

The following screenshot shows a hard return placed between the tags so the values will mount on separate lines.



The next example shows not only hard returns placed after each tag, but it also shows plain text (outlined in red) inserted directly into the product template before the Price attribute, including the currency symbol ($). This example shows STEPXML tags that have been created by dragging and dropping definitions for product name, the attribute Short Description, the attribute Price, and a table type.



There are no limitations on the type of plain text that can be added to STEP Publisher text frames, as long as the characters do not appear inside of the STEPXML tag brackets (< >). Also note that any manually added characters will be used every time you use the template to mount products on a page.

Edit XML Tags Freehand

It is uncommon to edit XML tags freehand, since the normal method of maintaining the STEPXML tags in the text frame is by dragging the element across from the **STEP Template Content** panel. However, it is possible to change or add tags manually. However, be aware that the system will not perform any data validation on the tags, so if you create a new tag such as <STEPREF A="MarketingText" />, it is the user's responsibility to make sure that the ID of the attribute and the XML syntax are both correct.

Additional Configurations for Product Template Text Frames

Once all STEP tags have been placed into the frame(s), in almost all circumstances, there must be additional configurations made not only to the tags but to the frame itself. These configurations are performed using the options available in the bottom panel of the **STEP Template Content** panel and the options available to text frames in the **STEP Template Frame** panel.

For information on configuration options available for STEP tags *inside* text frames, see the **STEP Template Content** topic. For information on all available options for product template text frames themselves, see the **Text Frame Parameters** topic.

Styling—such as fonts, bolding, color swatches, and so forth— is almost always applied to product template text frames as well. See the **Product Template Layout, Formatting, and Styles** topic for more information.

Image Frames in Product Templates

This topic explains the initial creation and configuration of image frames in product templates. Image frames are added to product templates in much the same way as text elements are, except there is some overlap between how adding images works between the STEP Template Content panel and the STEP Template Frame panel. Just as with text frames, there is more than one method of adding image frames to product templates.

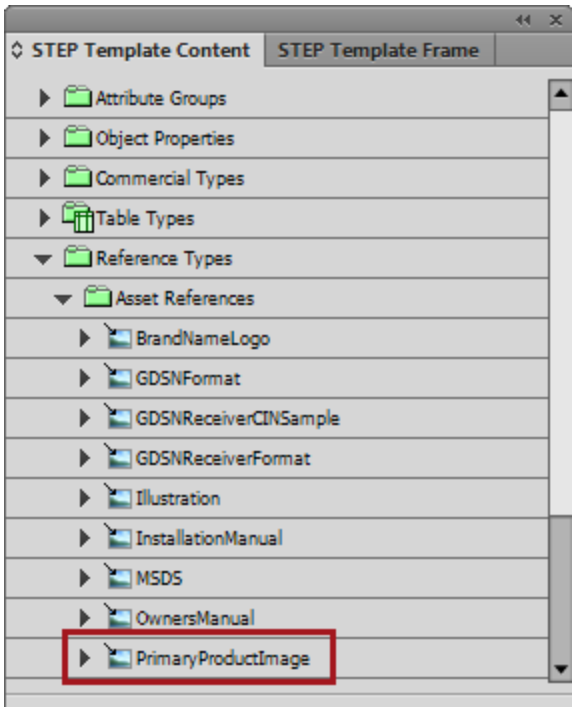
This topic assumes that you have basic familiarity with the STEP Template Content Template and STEP Template Frame panels, including how to browse for and navigate to elements contained within the STEP Template Content attribute tree. For full details on these panels, see the **STEP Template Content** topic and the **STEP Template Frame** topic.

Note: Even though this topic concerns image frames, other assets also can be mounted into image frames, such as PDFs.

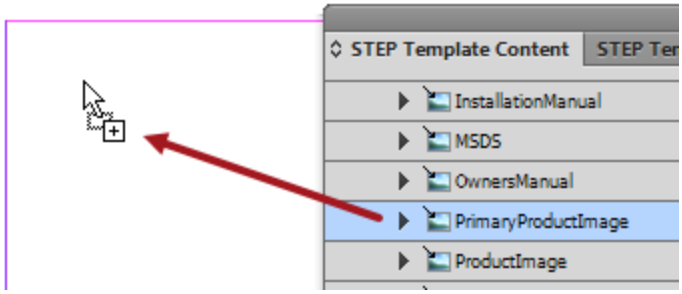
Dragging Asset References Directly From the STEP Template Content Panel

Dragging elements from the STEP Template Content panel directly onto the page enables you to simultaneously create the image frame and place the asset reference on the frame at the same time.

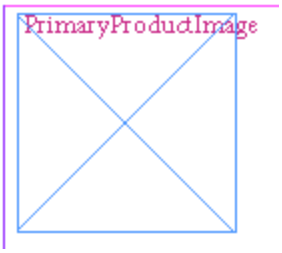
1. Open your product template, then open the **STEP Template Content** panel.
2. Search for or browse to the relevant reference type in the attribute tree of the panel. For this example, the PrimaryProductImage asset reference type will be used.



3. Using the PrimaryProductImage reference type as an example, select the reference type in the panel tree and, while holding down the left button on your mouse, drag the reference onto the product template. Release the mouse button where you would like to drop the frame.



4. A frame is created that contains the STEPXML tag of the selected asset reference type. Note that in this example, the reference type is displayed on the frame because **adornments** have been turned on. See the **STEP Template Frame** topic for more information on this feature.



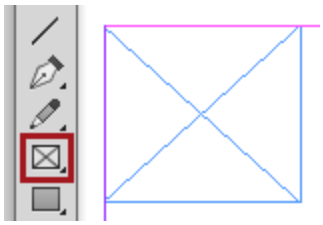
5. Resize and reposition the frame as needed.

> **Note:** Unlike text frames on product templates, only one asset reference type can be applied to an image frame at a time. However, if the asset reference allows for multiple references, all referenced images can be pulled onto the frame, or, the frame can be configured to 'tile across' the page and place each referenced asset in its own frame. See the **Sequencing Images in InDesign** topic for more information.

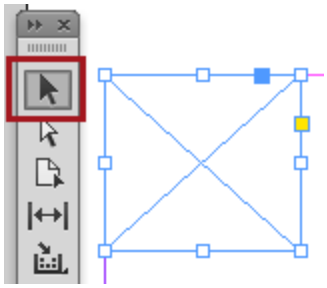
Using the Rectangle Tool to Draw the Frame

This method differs from the above instructions in that the image frame is drawn first, and the reference type does not need to be dragged onto the page.

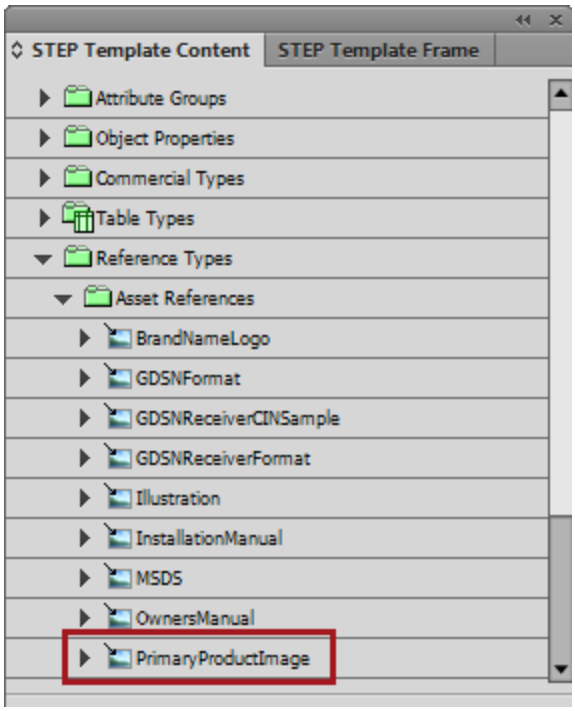
1. Draw an image frame on the product template with the InDesign rectangle frame tool.



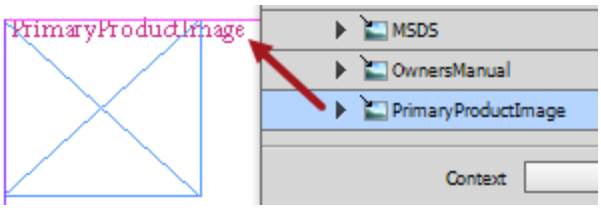
2. Select the image frame with the InDesign selection tool.



3. With your image frame selected, locate and click on the desired asset reference in the STEP Template Content attribute tree. (For this example, PrimaryProductImage is used.)



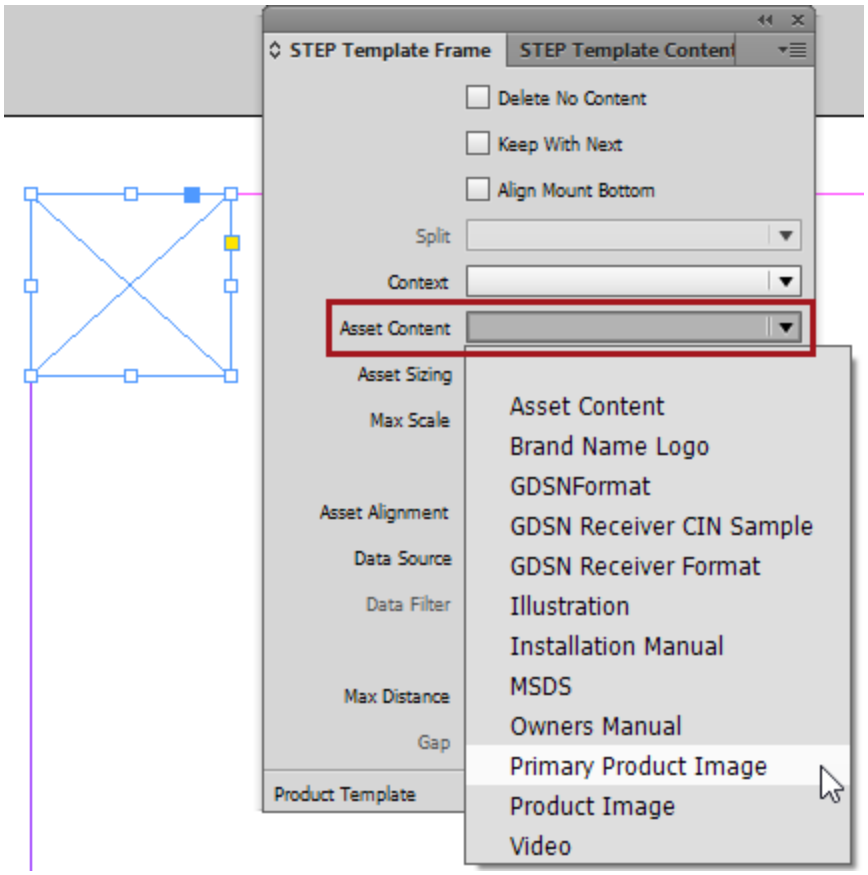
4. Once the asset reference type is selected, the STEPXML tagging is applied to the frame.



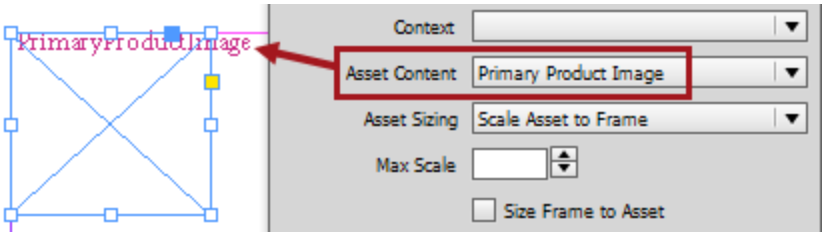
Using the STEP Template Frame Panel to Create the Image Frame

Because asset references are attached to entire frames, and no tagging goes 'inside' the frames, there is overlap in how to create image frames between the two STEP template panels. The following instructions describe how to place a tagged image frame on the page using the **STEP Template Frame** panel.

1. Open your product template, then open the **STEP Template Frame** panel.
2. Draw an image frame on your page with the rectangle tool, then select the frame with the selector tool.
3. With your image frame selected, select the relevant asset reference type from the **Asset Content** dropdown.



4. Once the asset reference type is selected, the STEPXML tagging is applied to the frame.



Additional Configurations for Product Template Image Frames

Once your image frame is in place and tagged with the STEP asset reference type, in almost all circumstances there must be additional parameters set on the frame using the STEP Template Frame panel. These parameters control how images appear on the page when a product presentation is mounted using the product template. These parameters include settings such as image scaling, image tiling, frame size adjustment, and the ability to delete the image frame from the page altogether if there is no asset referenced to the mounted product. For more information, see the **STEP Template Frame** topic.

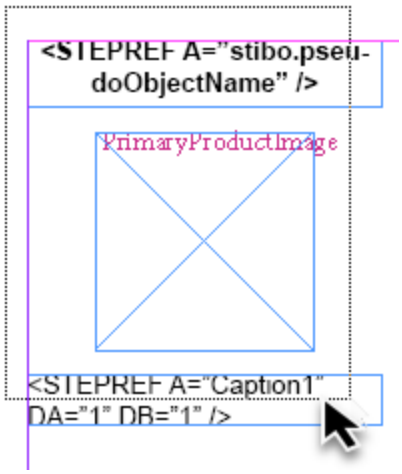
Grouped Frames in Product Templates

After text and image frames have been added to the product template, it is sometimes necessary to group frames together. Reasons to group frames include the following:

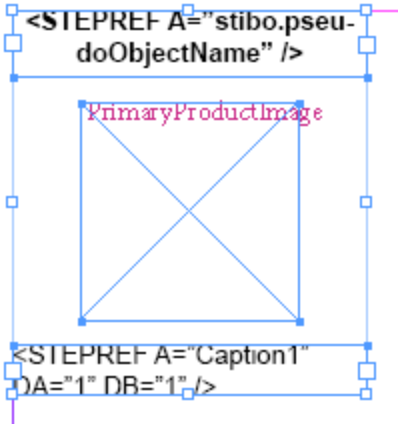
- To mount a linked asset and a metadata attribute connected to the asset (for example, an image caption) by grouping an image frame together with a text frame
- To tie together a product presentation with information from a referenced product, such as bringing in an image from a secondary product that is linked to the mounted object
- To ensure that the grouped elements always remain together when they are mounted

Frames are grouped using standard InDesign functionality.

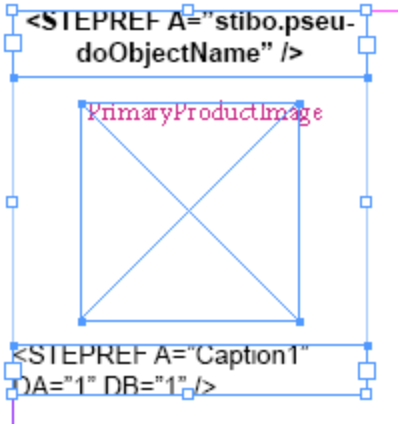
1. Choose the InDesign **selection tool,** then hold down the left button on your mouse while drawing a 'selection' frame around the objects to group.



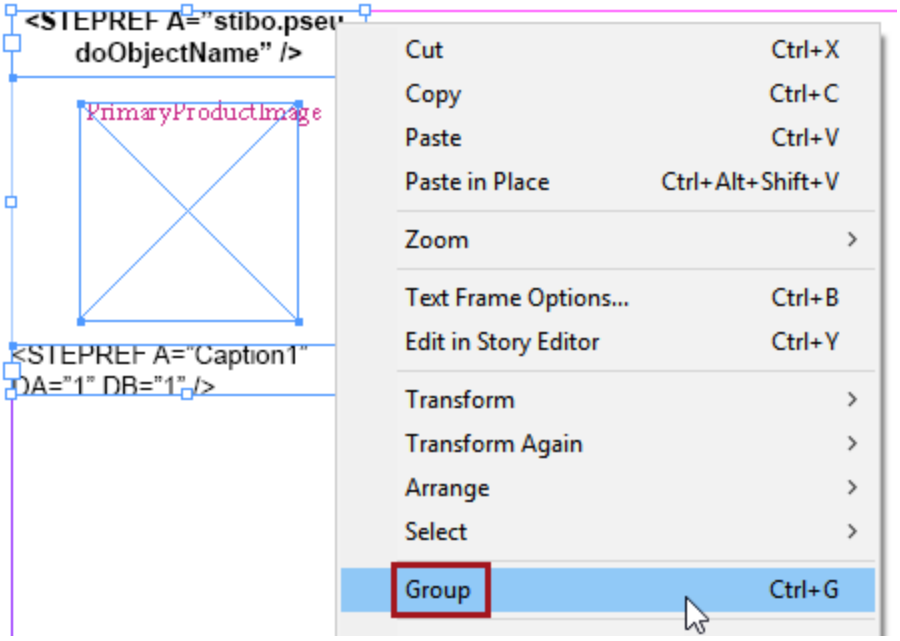
2. Release the mouse button to select all the frames.



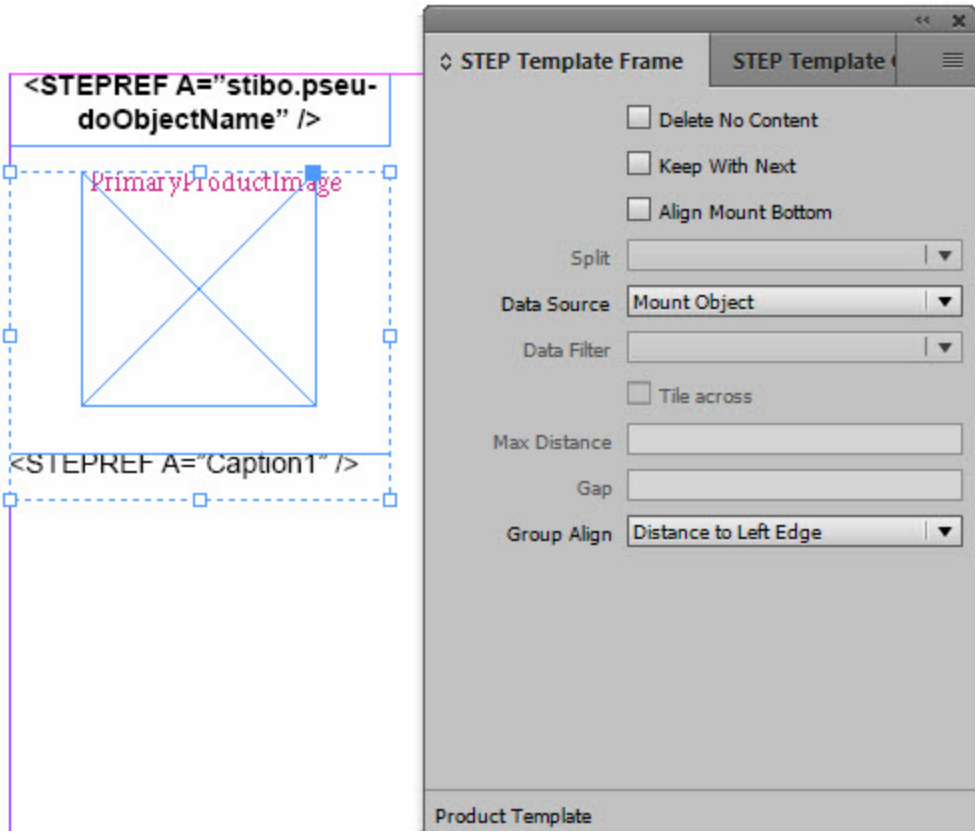
3. Right-click anywhere within the selected frames, then click **Group** from the popup menu. You may also right-click anywhere within the selected frames and press **Ctrl+G**.



4. The frames are now grouped.



Once the frames are grouped, in almost all circumstances, additional configurations will need to be applied to the frames using the **STEP Template Frame** panel.



For more information about the individual parameters available for grouped frames, see the **Grouped Frame Parameters** topic.

Product Template Layout, Formatting, and Styles

After creating a product template and defining which elements (attributes, images, and other elements) should be part of your product presentation, it is necessary to define how the data should be formatted once it comes across to the InDesign page. This involves arranging the text and image frames to match the layout that you are trying to accomplish as well as applying styling such as InDesign paragraph styles to text and swatches (colors) to frames and frame borders.

Note: This topic does not describe how to create paragraph styles, character styles, or swatches in InDesign. Explaining how to use InDesign itself is outside the scope of the STEP Publisher documentation.

Positioning Text and Image Frames

Since STEP'n'design product templates are standard InDesign documents, it is entirely up to users to design the layout of the finalized product presentation. STEP does not place limitations on how templates can be laid out or styled; the STEP portion of product template creation lies only in the application of STEPXML tagging and other parameters to frames and their content using the STEP panels.

Product templates are intended to create 'rough' layouts, with the expectation that DTP operators will still make manual adjustments to the page elements once the pages are mounted. However, in some cases, product templates can be designed in such a way that a product can be mounted onto the page with a perfect or near-perfect layout. Since STEP does not place limitations on how many product templates can be used within a single publication, it is standard practice to create multiple product templates for a publication to handle the varying product layouts that appear within.

Positioning Frames

Once you have built a product template with some image and text frames, you can determine their position relationship—the distance between the individual frames—by moving or sizing the frames.

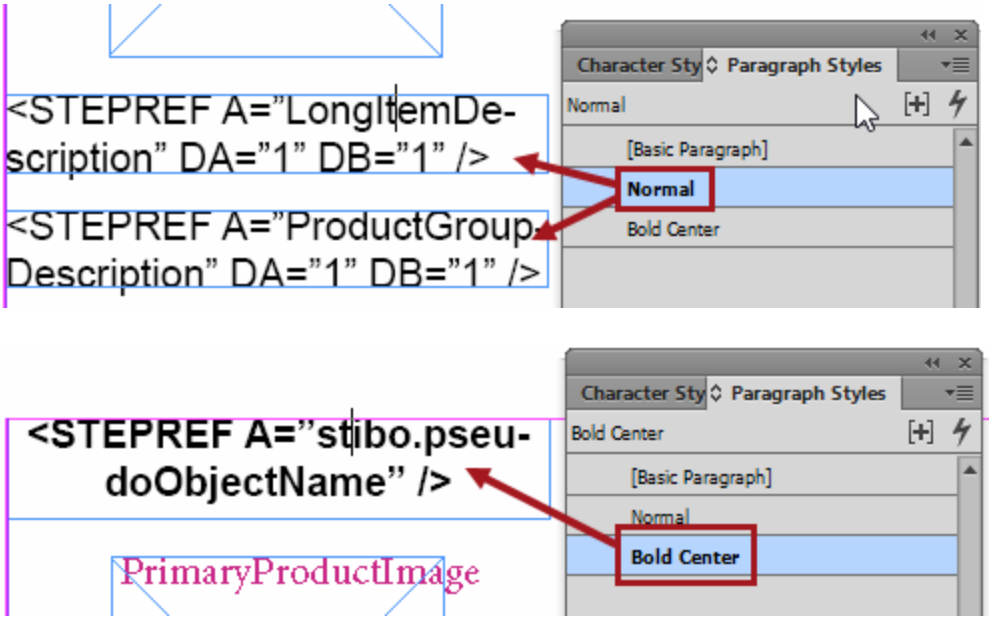
The distance between the elements in the product template will be kept when a product is mounted to the page using that template. When organizing and positioning your frames, you can use standard InDesign functions such as aligning, grouping, and rotation.

Applying Styles to Frames and Frame Contents

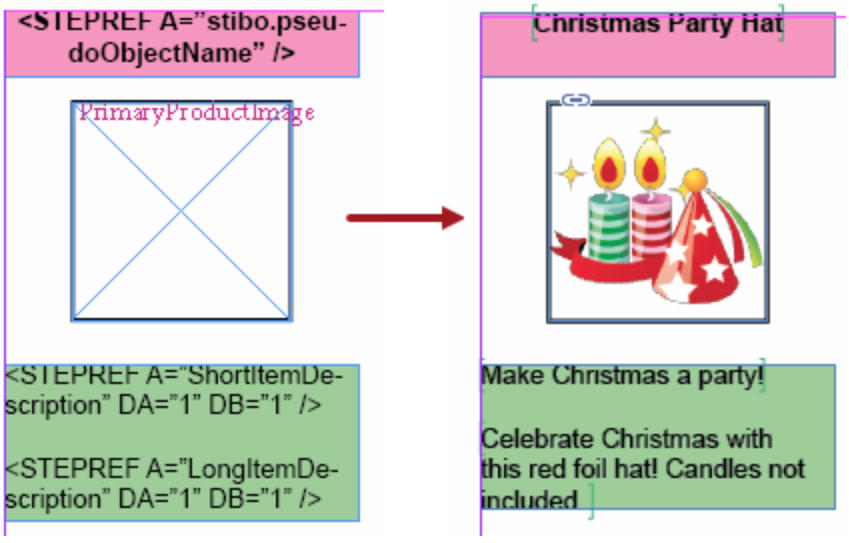
Even though STEP Publisher publication templates (also referred to as 'master pages' or 'mounting pages') are the documents that define the document size, margins, paragraph styles, character styles, table rules, swatches, and so forth that are used throughout a publication, it is strongly recommended that your product templates contain all of the same styles and swatches that are used in the publication template. If your product templates do not contain the same styles, however, all paragraph styles and other stylistic elements will still come across to the mounted InDesign page. It is a recommended practice for the styles to match.

You can define all styles in the product template and then load them to the publication template, or vice versa. Defining styles in a product template is identical to the procedure of defining styles in a publication template. For more information, see the **Publication Templates** topic.

The following screenshots show the application of standard InDesign paragraph styles to product template text.



The following screenshot shows a 'before and after' of a product mounted using a product template that employs paragraph styles, frame shading, and frame borders.



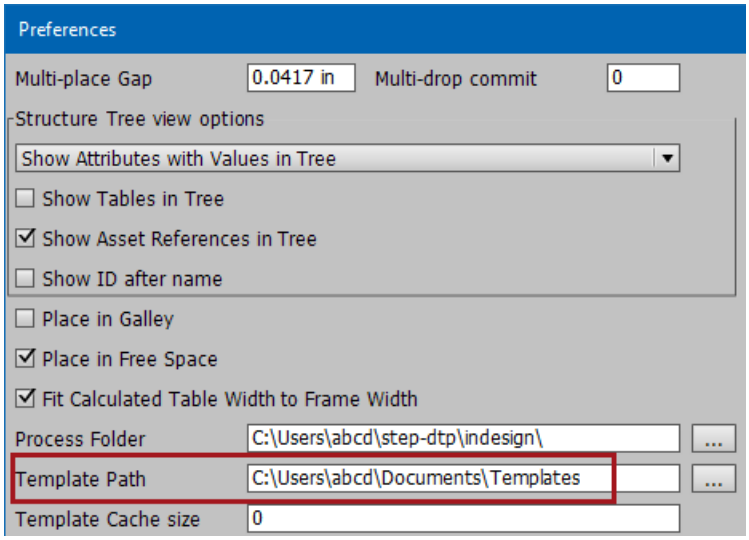
Note: Style tags do not need to be created in STEP for InDesign paragraph styles used in standard text frames. The only time STEP style tags are needed is for InDesign **character styles** and for text that appears within **tables**. See the **Publication Template Layout, Formatting, and Styles** topic for more information.

Storing and Editing Product Templates

After creating your product templates, you need to save them in the STEP Workbench and, in order to use them to build pages from within your InDesign client, on your local computer.

Storing Product Templates Locally

Product templates must be saved locally (on your own hard drive or other locally accessible file location) before they can be used to mount products from within InDesign using standard 'drag and drop' functionality. Save the templates as standard InDesign (.indd) files to a directory or folder on your machine, then provide the path where the templates are saved in the **Template Path** field of the STEP **Preferences** menu.



For information on the STEP Preferences menu, see the **Configuring the STEP Preferences Menu** topic.

Storing Product Templates in STEP

Product templates must be saved to STEP for the following reasons:

- At least one product template must exist in STEP in order to create a publication. (The exception to this is if you create a publication by using a Publication Excel import. However, the publication cannot be used until a product template is linked to it, as the Publication Excel import merely creates the publication *structure*. See **Importing Publications in Excel** for more information.)
- Templates stored in STEP can be opened and edited by any user who has access to the same STEP environment, in essence treating STEP as a 'cloud' storage solution
- Product templates must be stored in STEP in order to utilize Proof View functionality
- Product templates must be stored in STEP in order to use the Flatplanner and AutoPage components

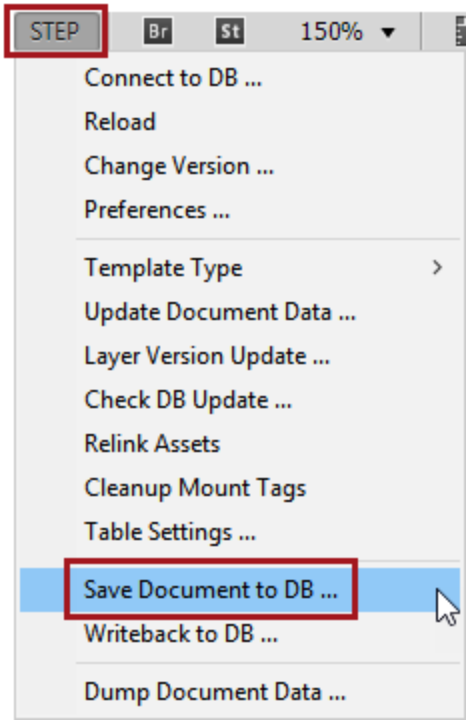
Note: For standard drag-and-drop functionality, *all* product templates do not have to be saved in STEP, but it is recommended to store them in STEP so other users can open and edit them if needed.

To store a product template in STEP:

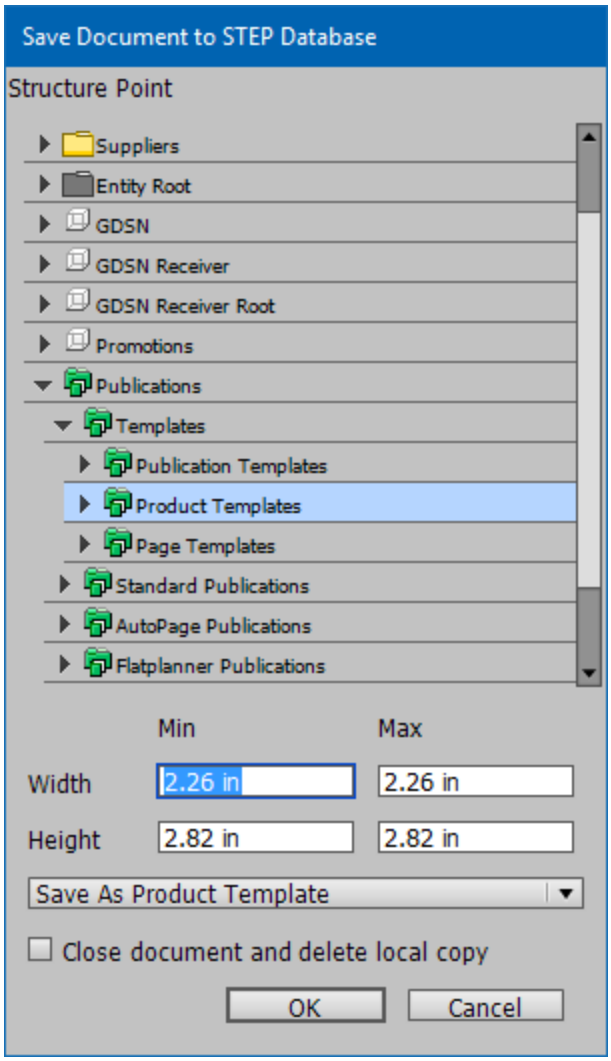
1. Save the InDesign document on your local hard drive as a standard InDesign file.

   Note: STEP will not let you save a template to the workbench unless it is first saved locally. However, once the template is saved in STEP, you may delete the local file if you do not plan on using it later for drag-and-drop page mounting.

2. Click on STEP > **Save Document to DB ...**.



3. The **Save Document to STEP Database** dialog displays.



4. Select the publication group where you would like to save the template.

   Note: Templates can only be saved to publication group folders; they cannot be saved into publications or section folders.

   Determining which publication group to save your product templates into is a matter of user preference. Common choices are to save all product templates in a publication group that is devoted solely to product templates, or to save product templates in a publication group along with their associated publication(s).

5. Choose **Save as Product Template** from the dropdown list near the bottom of the dialog.
6. Check the **Close document and delete local copy** box to delete the local copy of your template once you save it to STEP.
7. Optionally, you can specify a minimum and maximum value for the product template's dimensions by entering the values in the **Min** and **Max** value fields for the **Height** and **Width** dimensions. The Min and Max dimension values are used in Flatplanner pagination rules. The values are pre-populated based on the

dimensions of the total content of your product template but can be overridden by entering new values in the fields. For more information, see the **Flatplanner Pagination Rules** topic in the **Flatplanner** documentation.

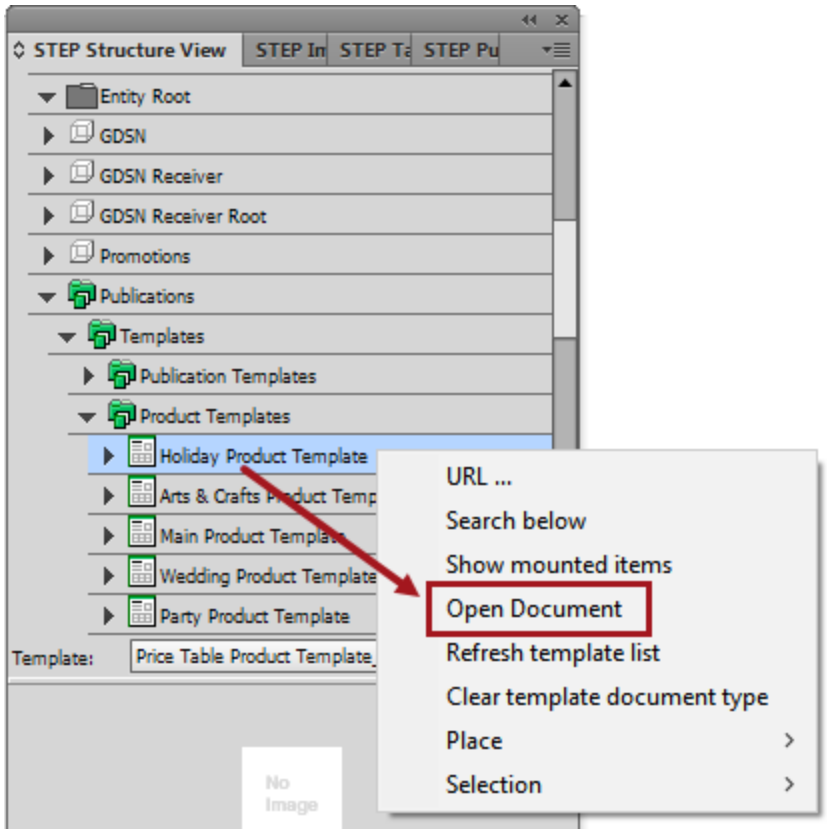
8. Click **OK**. The product template is saved in STEP.

Opening and Editing Product Templates

If a product template needs to be altered after it is saved to STEP, it must be opened from the **STEP Structure View** panel within InDesign. This is to ensure that your system recognizes the template as the original file, as product templates previously saved to STEP contain an embedded, 'hidden' STEP ID. If the template is opened from a location on a local drive and saved back to STEP, the original file will not be overwritten—STEP will recognize this template as a new file.

To open and edit a product template:

1. Open the **STEP Structure View** panel in InDesign.
2. Browse to or search for the product template to edit.
3. Right-click on the template and select **Open Document** from the menu.



4. Make the necessary edits to the template, then save it on your local drive. (All templates must first be saved locally before they can be loaded to STEP.)

5. Follow the steps outlined in the previous section of this topic ('Storing Product Templates in STEP') to save the template back to STEP. Make sure that you save the template back to the same location from which it was opened.
6. The updated template will overwrite the previous document on STEP and will not need to be relinked to any publications or products.

Creating a Table of Contents Product Template

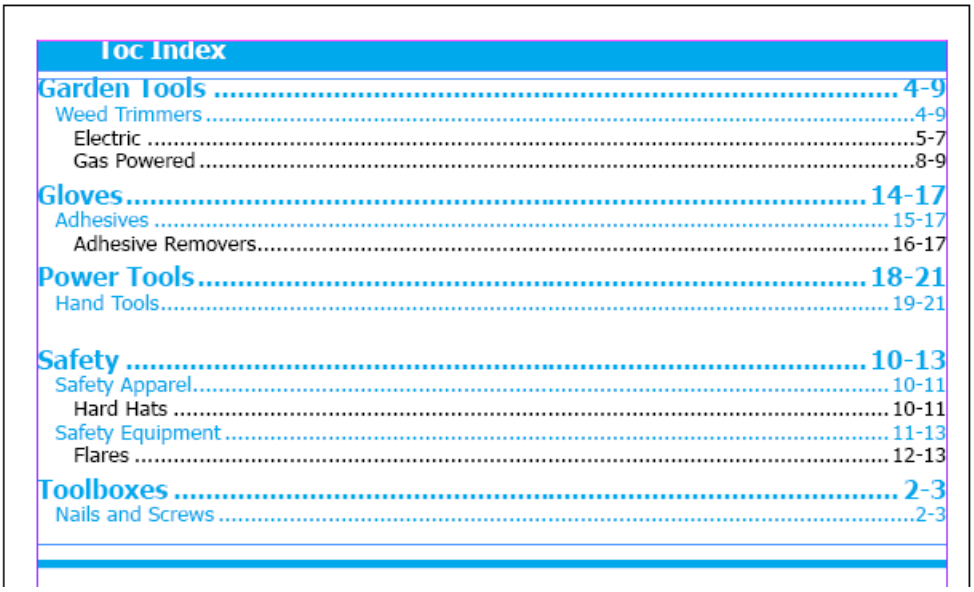
Product templates that mount tables of contents in publications can be created in STEP Publisher. Tables of contents typically appear at the beginnings of publications and/or sections and can be mounted manually using 'drag and drop' operations, as well as automatically using AutoPage. These tables of contents can be sorted either alphabetically by section name or by page number. When sorted alphabetically, they can be thought of as **section indexes**, as their intent is to alphabetically list the STEP names of all sections that appear within an entire publication and/or the names of all subsections that appear within a section. When sorted by page number, they can be thought of as true **tables of contents**, listing mounted objects in the actual order that they appear within the publication.

Product templates designed to create tables of contents / section indexes utilize tagging that mounts the following information:

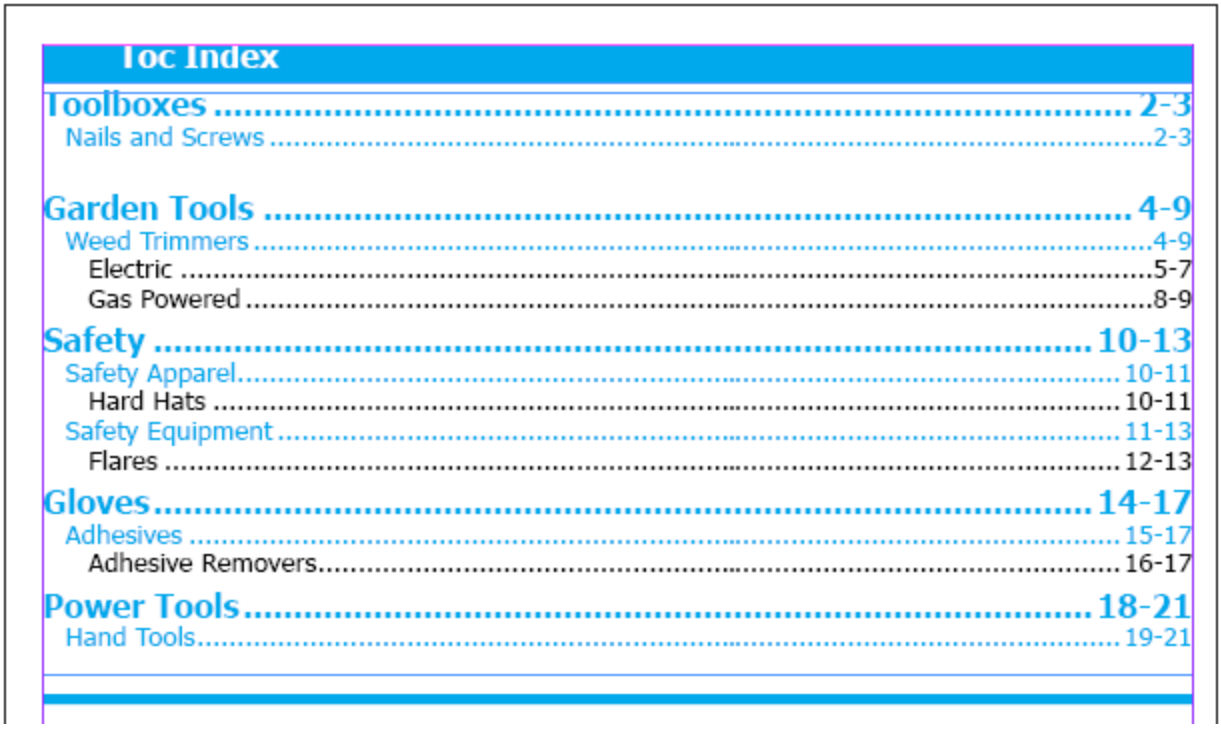
- STEP names of the child sections and subsections of the publication
- Values from calculated description attributes that pull in the first and last page numbers of mounted pages that are saved into the publication's sections and subsections

In addition, paragraph styles are set up to insert dot leaders between the section names and the page numbers.

The following screenshot shows an example of an **alphabetically sorted** table of contents mounted from a publication object:



This screenshot shows a table of contents sorted on **page number**:



This topic explains the steps involved in creating the page number calculated attributes, the required tagging for the product template, the InDesign paragraph styling needed to insert dot leaders, and instructions for mounting the table of contents once the product template is configured.

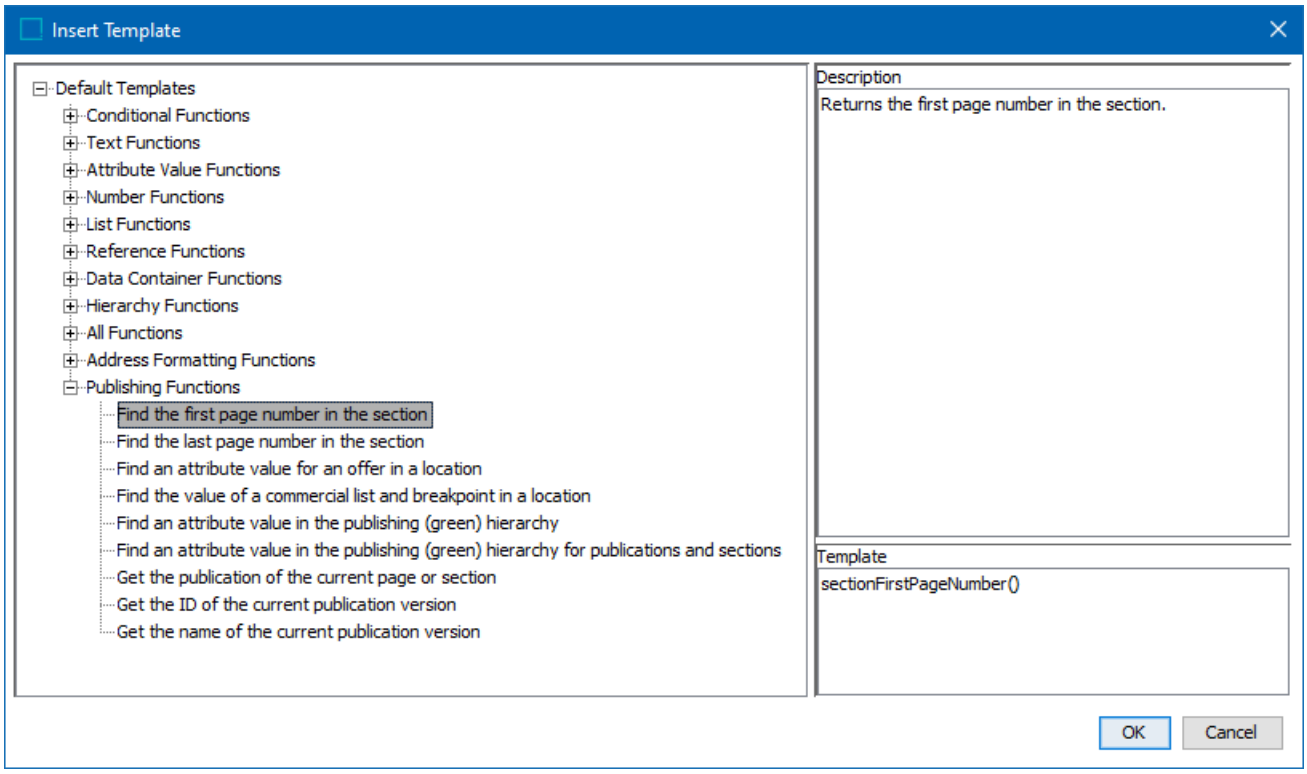
Additionally, this topic explains how to mount a table of contents using standard STEP Publisher 'drag and drop' functionality. For instructions on how to mount a table of contents using **AutoPage**, see the **Creating Tables of Contents in AutoPage** section of the **AutoPage** documentation.

Configuring Page Number Calculated Attributes

Two calculated **description** attributes must be created and made valid on the section object type(s) that you are using in your publication. One of these attributes should pull the first page number in the section and the second attribute should pull the last page number in the section.

To create these attributes, follow these steps:

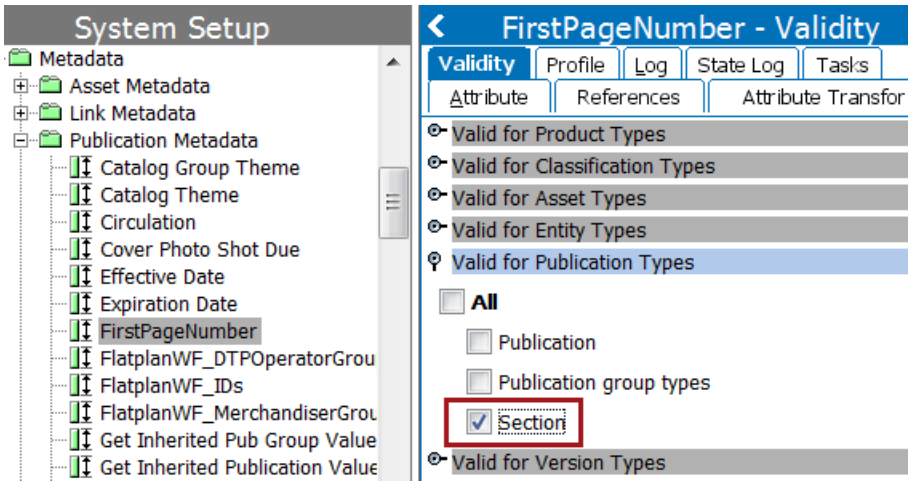
1. Create a Description attribute by the same method that you would create any other description attribute. (See the **Creating Attributes** section of the **System Setup** / **Super User Guide** documentation for more information.) Give it a name that indicates what it is used for, e.g., FirstPageNumber.
2. After creating the attribute, right-click in the **Value template** field on the **Attribute** tab and select **Edit Function**. The **Function Editor** displays.
3. Click **Insert Template**, then expand the **Publishing Functions** section of the **Default Templates**.
4. Select 'Find the first page number in the section' and click **OK**. The **Insert Template** window closes.



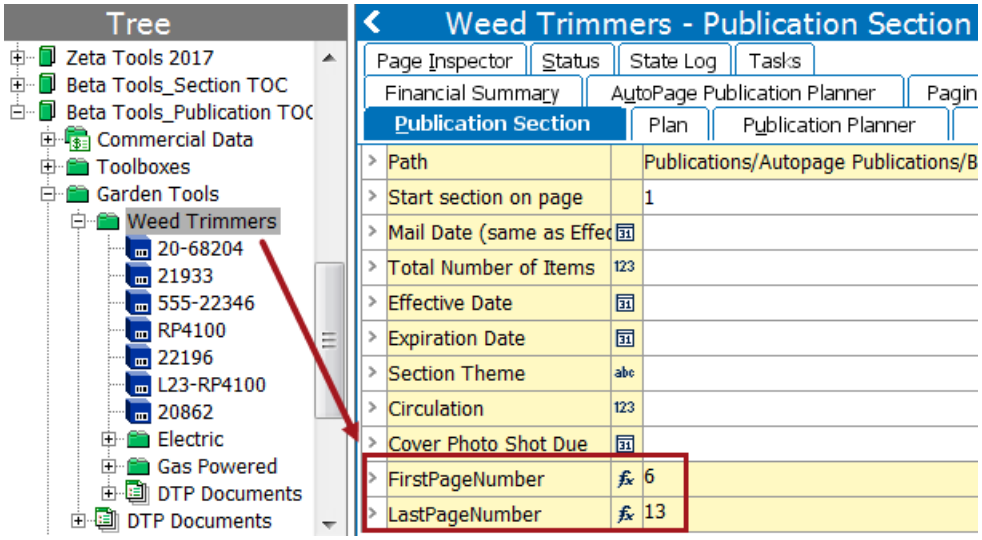
5. No additional action is needed in the **Function Editor**, so click **OK** to close it.
6. To create the second calculated attribute—which will pull the last page number in the section—the steps are identical to 1 - 5 above, except in step 4 you will select 'Find the last page number in the section.'

Note: Calculated attributes related to publishing functions cannot be tested in the Function Editor, as publication hierarchy [green] objects are not among the available options when selecting an object as the Evaluation Node.

7. On the **Validity** tab for each of your attributes, check the **Section** box to make them valid on the desired section object types.

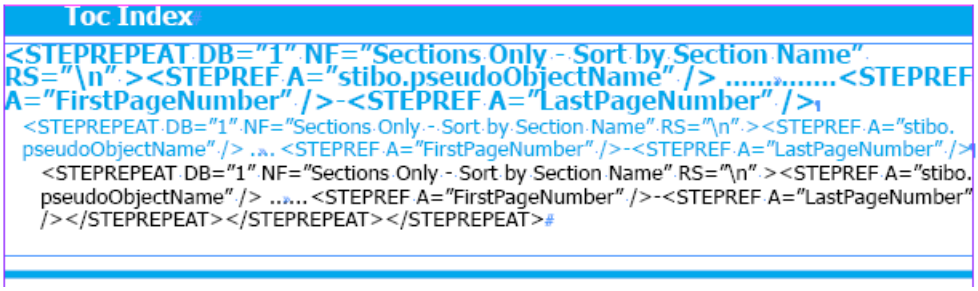


8. When actual pages have been saved to STEP into your section, the calculated attributes will display page numbers as such:



Configuring the Table of Contents Product Template

A product template intended to mount tables of contents will look similar to the following example. Note that text styles, colors, and so forth are completely configurable to individual user needs. This is only a sample for illustration purposes.



Note: This topic does not explain all aspects of product template creation; it merely focuses on how to create a product template to mount a table of contents. For more general information on creating product templates, see the **Product Templates** topic.

The sample pictured above is designed to mount three levels of subsections—in alphabetical order—by using the **Repeat Selection** options available in InDesign. For more information on these options, see the **Using the Repeat Function for Subproducts** topic in this guide.

The following text is the content that appears in the above screenshot:

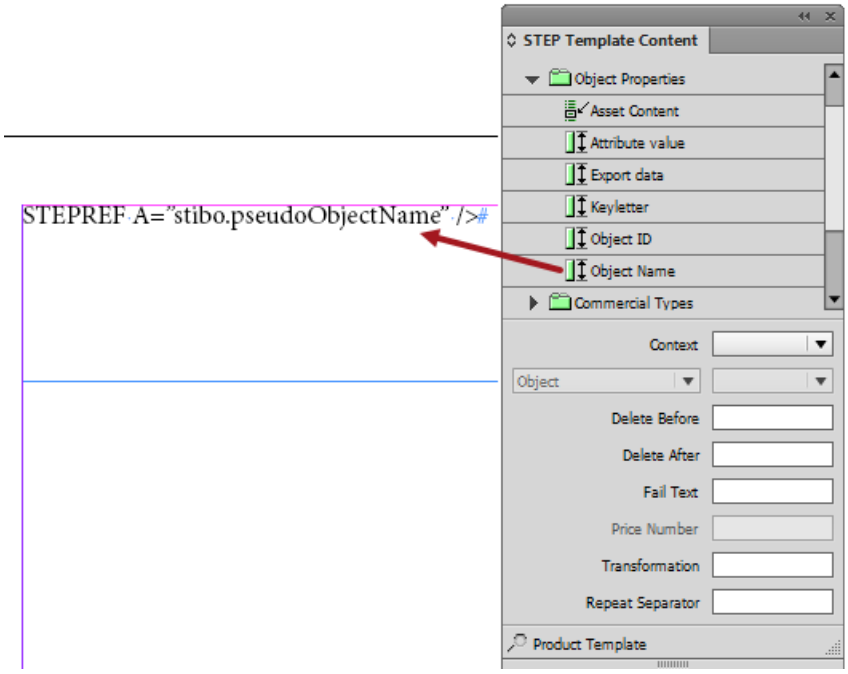
<STEPREPEAT NF="Sections Only - Sort by Section Name" RS="\n" ><STEPREF A="stibo.pseudoObjectName" /> <STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" />

<STEPREPEAT NF=”Sections Only - Sort by Section Name” RS=”\n” ><STEPREF A=”stibo.pseudoObjectName” /> <STEPREF A=”FirstPageNumber” />-<STEPREF A=”LastPageNumber” />

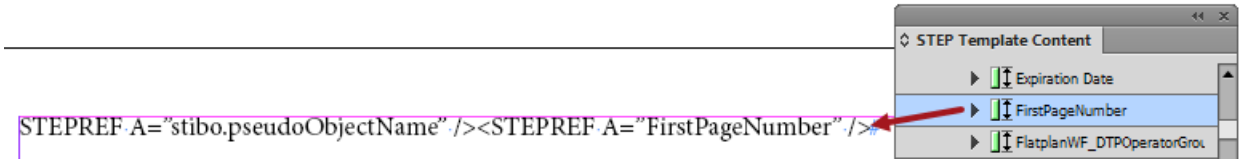
<STEPREPEAT NF=”Sections Only - Sort by Section Name” RS=”\n” ><STEPREF A=”stibo.pseudoObjectName” /> <STEPREF A=”FirstPageNumber” />-<STEPREF A=”LastPageNumber” /></STEPREPEAT></STEPREPEAT></STEPREPEAT>

To set up this tagging on a product template in InDesign, follow these steps:

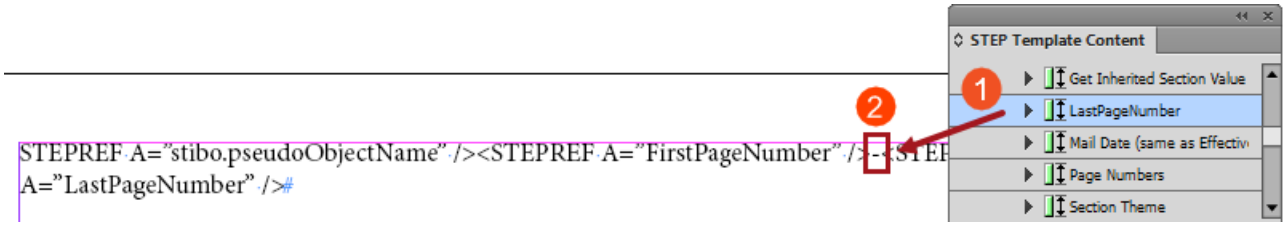
1. With your product template open, open the **STEP Template Content** panel by navigating to Window > STEP Template Content from the application bar across the top of the InDesign interface.
2. Using the InDesign **Text** tool, draw a text frame to the width that you would like your table of contents to appear.
3. Drag the **Object Name** 'pseudo attribute' into the text frame. Object Name is located in the **Object Properties** folder in the STEP Template Content panel. Object Name is used to mount the STEP names of the sections and subsections in the publication.



4. Drag the attribute that you are using for the first page number into the text frame directly after the Object Name tag.



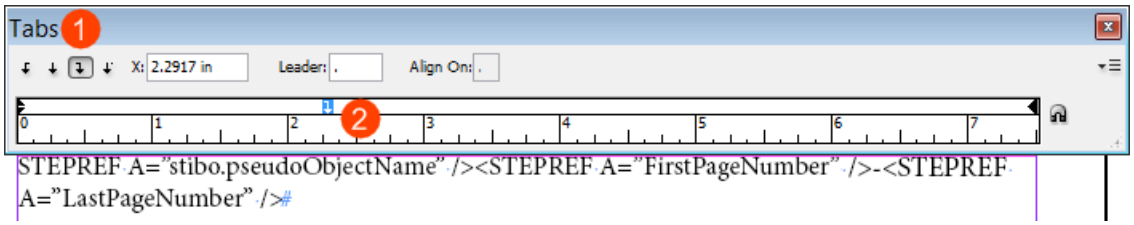
5. Drag the attribute that you are using for the **last** page number into the text frame, directly after the first page number tag, then place a hyphen between the two tags.



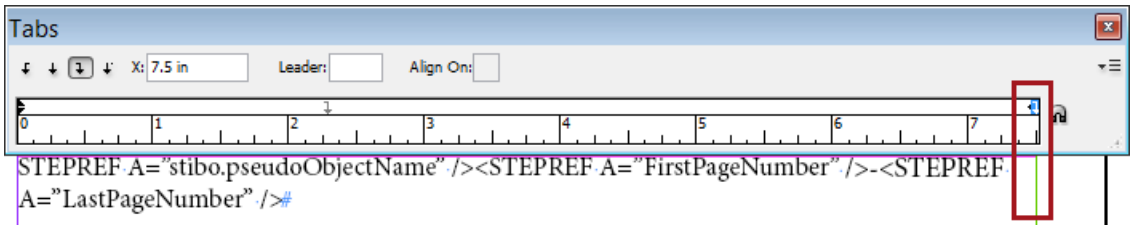
6. To set up the dots (dot leader) between the tags for the section name and the first page number, follow these steps.

> **Note:** This dot leader should be added to your paragraph style so you can reuse it later if needed.

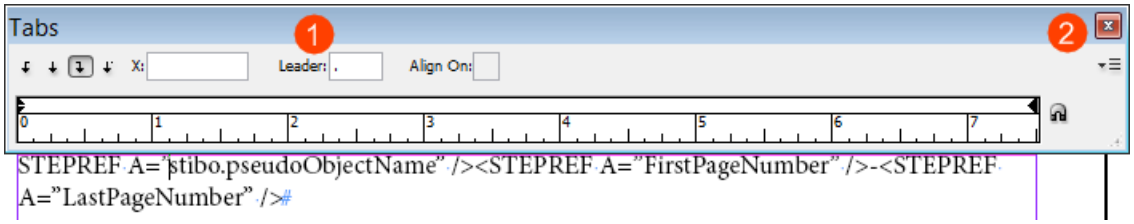
- With your text frame selected, navigate to Type > **Tabs** in the InDesign application bar. The **Tabs** dialog will display at the top of your text frame.
- Click the **right tab** icon, then click anywhere on the ruler to apply the right tab.



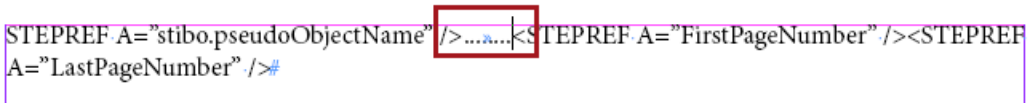
- Click the tab symbol that you just placed in the ruler, then hold down the left button on your mouse and drag the tab symbol to the far right of the ruler until it aligns with the right edge of the text frame. (The edge of the frame will turn green if you have Smart Guides turned on in InDesign.)



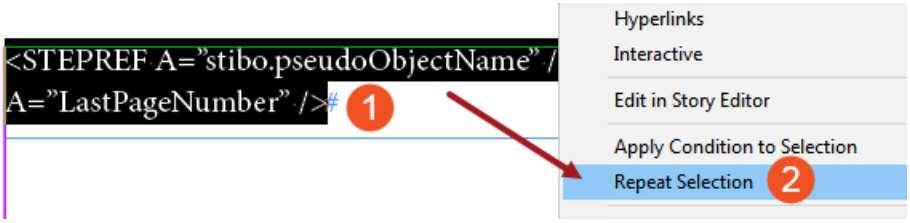
- Place a period in the **Leader** box, then click **X** to close the Tabs dialog.



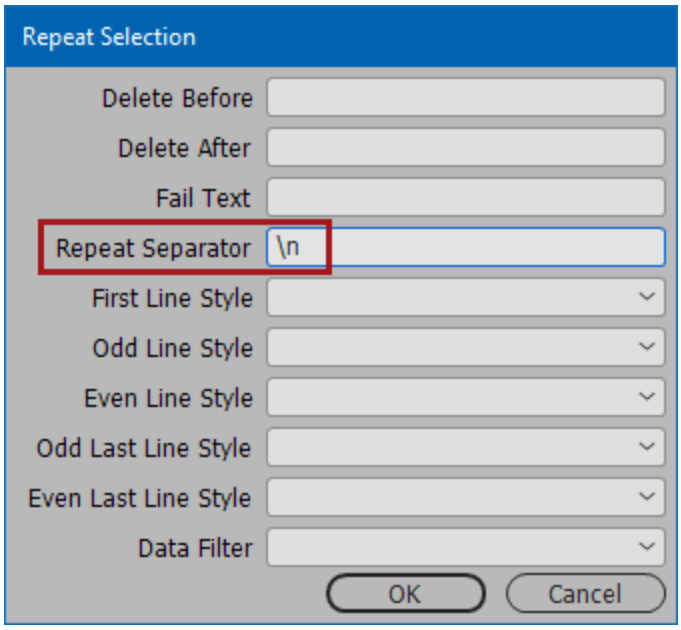
7. Using the **text** tool, place your cursor between the tags for the section name and the first page number, then press the Tab key. The dots will appear between the two tags.



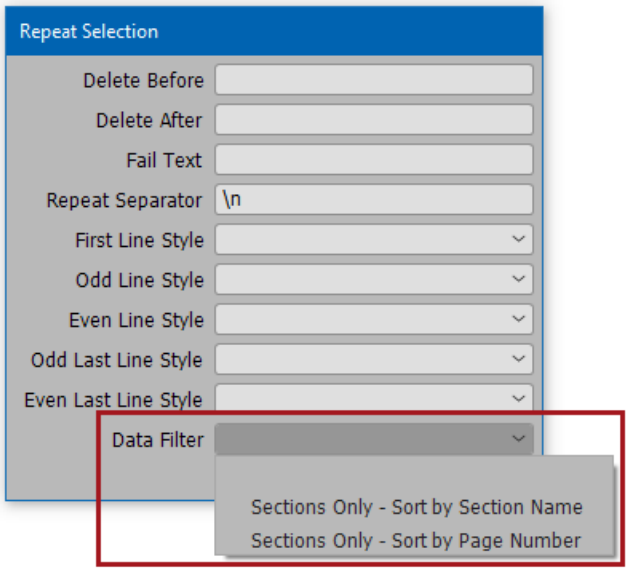
8. Next, using the text tool, highlight all content in the frame, then right-click and select **Repeat Selection**.



9. On the **Repeat Selection** dialog, type **\n** into the **Repeat Separator** field. The repeat separator is the string or character that will be placed between each repeated entry. **\n** is the symbol for hard return.



10. Next, make a selection from the **Data Filter** dropdown list. To sort the table of contents alphabetically by section name, choose **Sections Only - Sort by Section Name**. To sort the table of contents by page number, choose **Sections Only - Sort by Page Number**. Click **OK** to close the dialog.



11. Your tagging should now look like this (example shows the 'Sections Only - Sort by Section Name' selection):

```
<STEPREPEAT NF="Sections Only - Sort by Section Name" RS="\n" ><STEPREF A="stibo.pseudo-
ObjectName" />..<STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" /></
STEPREPEAT>¶
```

12. Copy and paste the tagging into the same frame two more times. This will enable the product template to pick up section names and page numbers from two additional levels of subsections. Your tagging should look like this:

```
<STEPREPEAT NF="Sections Only - Sort by Section Name" RS="\n" ><STEPREF A="stibo.pseudo-
ObjectName" />..<STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" /></
STEPREPEAT>¶
<STEPREPEAT NF="Sections Only - Sort by Section Name" RS="\n" ><STEPREF A="stibo.pseudo-
ObjectName" />..<STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" /></
STEPREPEAT>¶
<STEPREPEAT NF="Sections Only - Sort by Section Name" RS="\n" ><STEPREF A="stibo.pseudo-
ObjectName" />..<STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" /></
STEPREPEAT>¶
```

13. Cut the two </STEPREPEAT> end tags from the end of the first and second paragraphs, then paste them at the end of the last paragraph. There should now be three </STEPREPEAT> end tags at the end. Your tagging should look like this:

```
<STEPREPEAT NF="Sections Only - Sort by Section Name" RS="\n" ><STEPREF A="stibo.pseudo-
ObjectName" /> ... » ... <STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" />¶
<STEPREPEAT NF="Sections Only - Sort by Section Name" RS="\n" ><STEPREF A="stibo.pseudo-
ObjectName" /> ... » ... <STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" />¶
<STEPREPEAT NF="Sections Only - Sort by Section Name" RS="\n" ><STEPREF A="stibo.pseudo-
ObjectName" /> .. » .. <STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" /></
STEPREPEAT></STEPREPEAT></STEPREPEAT>¶
```

14. Apply styling (e.g., font size, text bolding, paragraph indents) as needed to differentiate the three levels of the TOC. For example:

```
<STEPREPEAT NF="Sections Only - Sort by Section Name" RS="\n" ><STEPREF A="stibo.
pseudoObjectName" /> ..... » ..... <STEPREF A="FirstPageNumber" />-<STEPREF
A="LastPageNumber" />¶
    <STEPREPEAT NF="Sections Only - Sort by Section Name" RS="\n" ><STEPREF A="stibo.pseudoObject-
    Name" /> ..... » ..... <STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" />¶
        <STEPREPEAT NF="Sections Only - Sort by Section Name" RS="\n" ><STEPREF A="stibo.pseudoObjectName" /><STEPREF
        A="FirstPageNumber" />-<STEPREF A="LastPageNumber" /></STEPREPEAT></STEPREPEAT></STEPREPEAT>¶
```

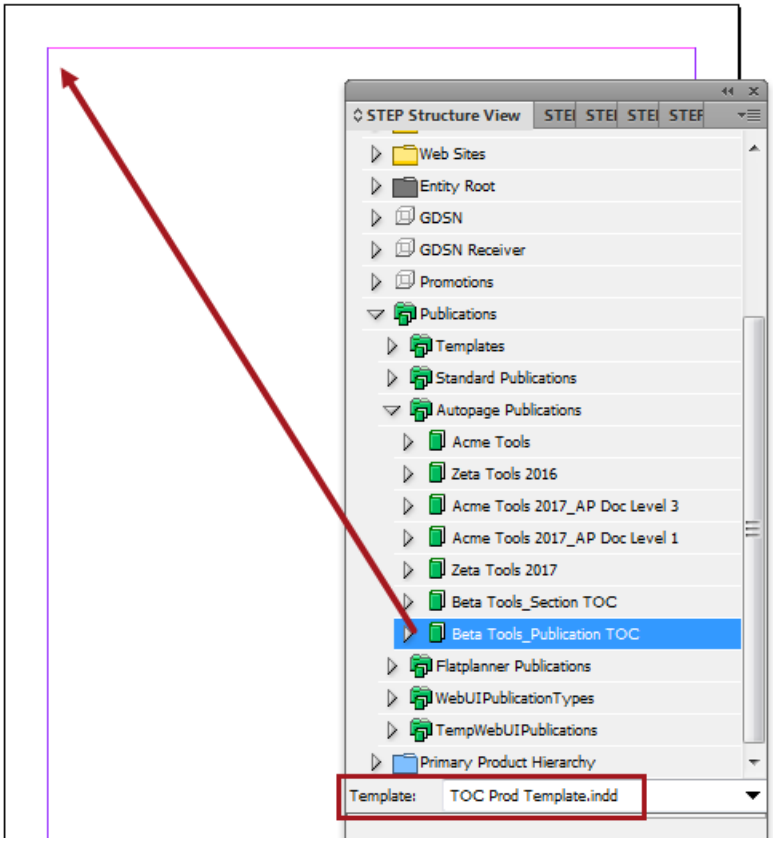
15. Next, test your product template to ensure that it has been set up correctly.

Mounting the Table of Contents Product Template

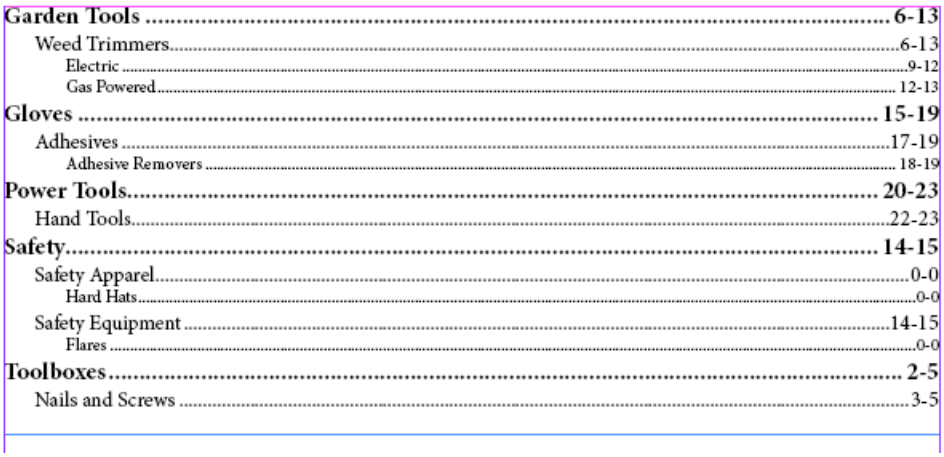
The TOC product template can be manually tested in InDesign by dragging the desired publication object from the **STEP Structure View** panel and dropping it onto a blank InDesign page (or a publication template).

To test the TOC product template, follow these steps:

1. With your blank document / publication template open in InDesign, locate the relevant publication in the **STEP Structure View** panel.
2. Make sure that your TOC product template is displayed in the **Template** dropdown at the bottom of the STEP Structure View panel.
3. Left-click the desired publication, then hold down the mouse button as you drag the publication onto the page. Release the mouse button in the upper left corner of the page.



4. The table of contents will mount and should look similar to the following:



Converting a Sample Document into a Product Template

A sample document created outside of STEP can be converted into a STEP Publisher product template in InDesign—either an entire page at once or one link at a time—by using the **Convert to STEP Product Template** and **Convert to STEP Tags** functions, respectively. These features are intended for use on existing pages on which all page elements are already arranged in the desired page layout, preventing the need to create the product template from scratch. Though documents created outside of STEP are commonly used as a starting point for product template creation, these features enable users to partially (or even fully) automate the process instead of having to manually remove all content from frames, identify what STEP content belongs in each frame, and manually apply STEP Publisher template tagging to each frame.

Though this feature cannot be used to automatically create publication templates or page templates from sample documents, you may manually convert the sample document into one of these two document types after first converting it into a product template.

This topic assumes that users are familiar with the overall functionality of product templates and STEP Publisher.

The following sections of this topic explain the different methods of converting a sample document to a product template.

Method 1: Entire Page at Once

A sample document can, in some instances, be fully converted to a product template in a matter of clicks using the **Convert to STEP Product Template** function.

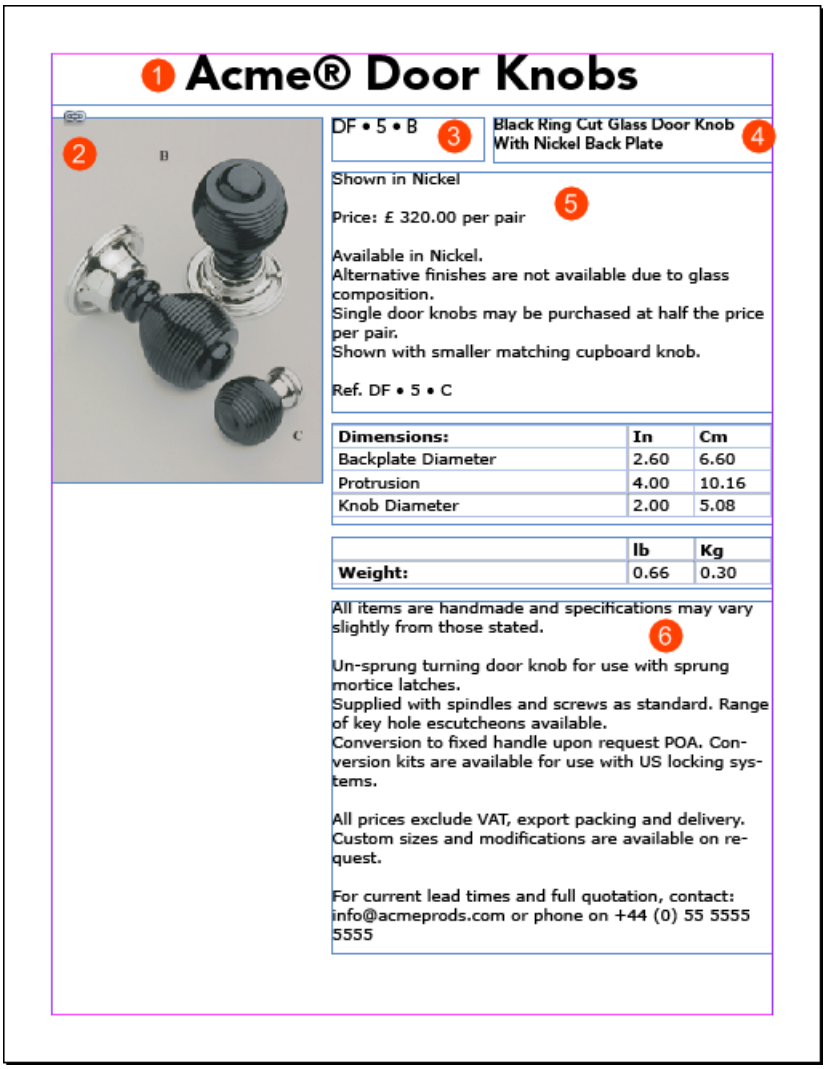
This method requires that a product already exists in STEP that contains matching content to the contents of the sample page. If such a product does not already exist, then a 'dummy' product should be created. When using this method, the system will scan the page to locate content matches on the selected product in STEP. For example, if there is an image named 'Image.jpg' embedded in the sample file, and there is an image named 'Image.jpg' in STEP that is linked to the product by a Primary Product Image reference type, then the image will be removed from the image frame on the sample page and replaced with the tagging for the Primary Product Image reference type.

The concept works the same way with text frames. If the text content in a frame—either the entire contents of the frame or part of the text within a frame—matches content in STEP, then the text will be removed from the page and replaced with the tag for the attribute in STEP that contains the matching content.

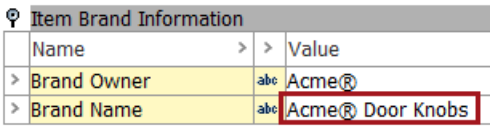
The following example shows a sample document as compared against a matching product in STEP. The numbering in the image corresponds with the numbered list below the image to explain what tags the frames will be linked to when the sample is converted.

Note that the tables on the page are not numbered, as Convert to STEP Product Template cannot automatically recognize tables. See the next section on converting tags / frames one at a time for more information on how to manually convert a table frame to a frame containing a STEP table tag.

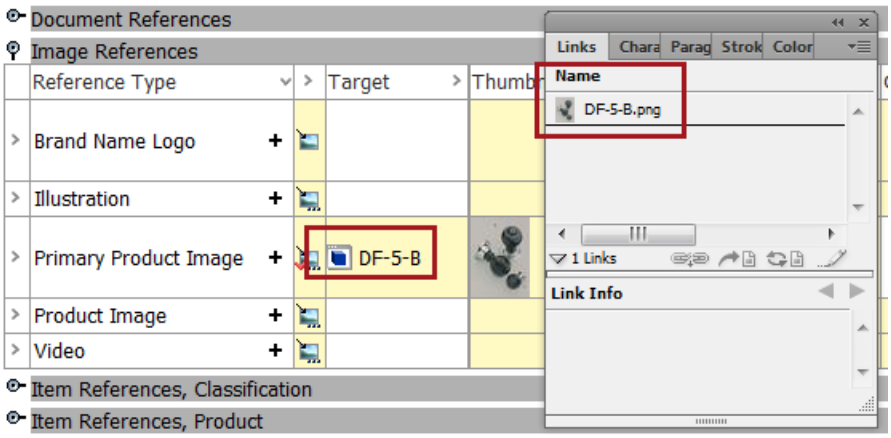
Sample Document Elements



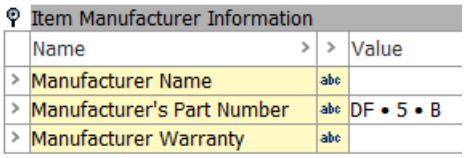
1. Brand Name:



2. Primary Product Image: The following screenshot shows the InDesign 'Links' panel superimposed over the Image References section of the product's References tab, displaying what needs to match before the system can apply the tag to the frame.

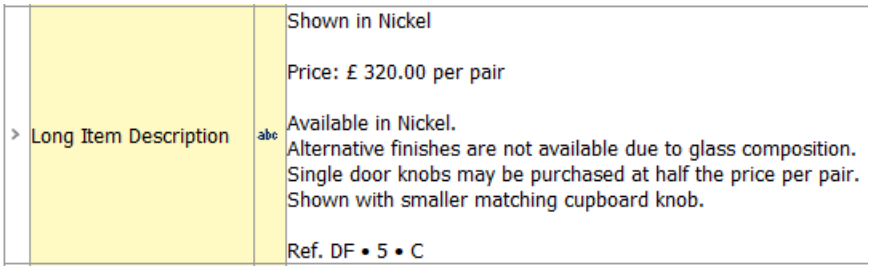


3. Manufacturer's Part Number:



4. Name:

5. Long Item Description:



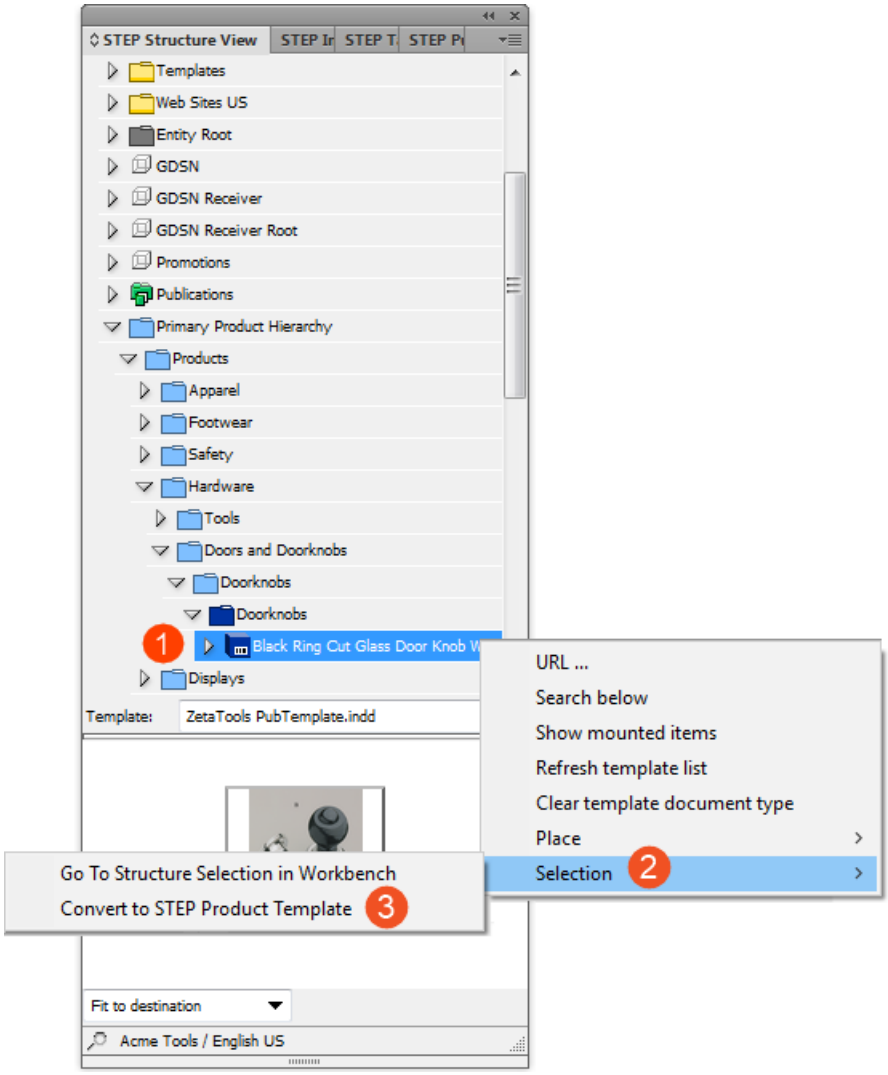
6. Product Group Description:

Sales Item Marketing Descriptions

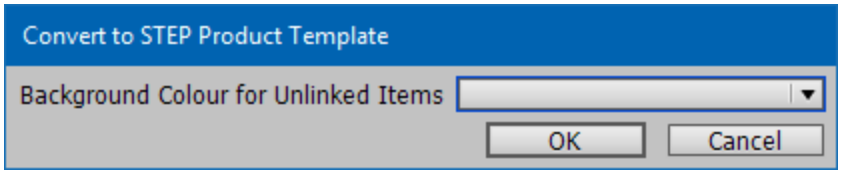
Name	Value
Product Group Description	All items are handmade and specifications may vary slightly from those stated. Un-sprung turning door knob for use with sprung mortice latches. Supplied with spindles and screws as standard. Range of key hole escutcheons available. Conversion to fixed handle upon request POA. Conversion kits are available for use with US locking systems. All prices exclude VAT, export packing and delivery. Custom sizes and modifications are available on request. For current lead times and full quotation, contact: info@acmeprods.com or phone on +44 (0) 55 5555 5555

Steps to Convert the Sample Document to a Product Template

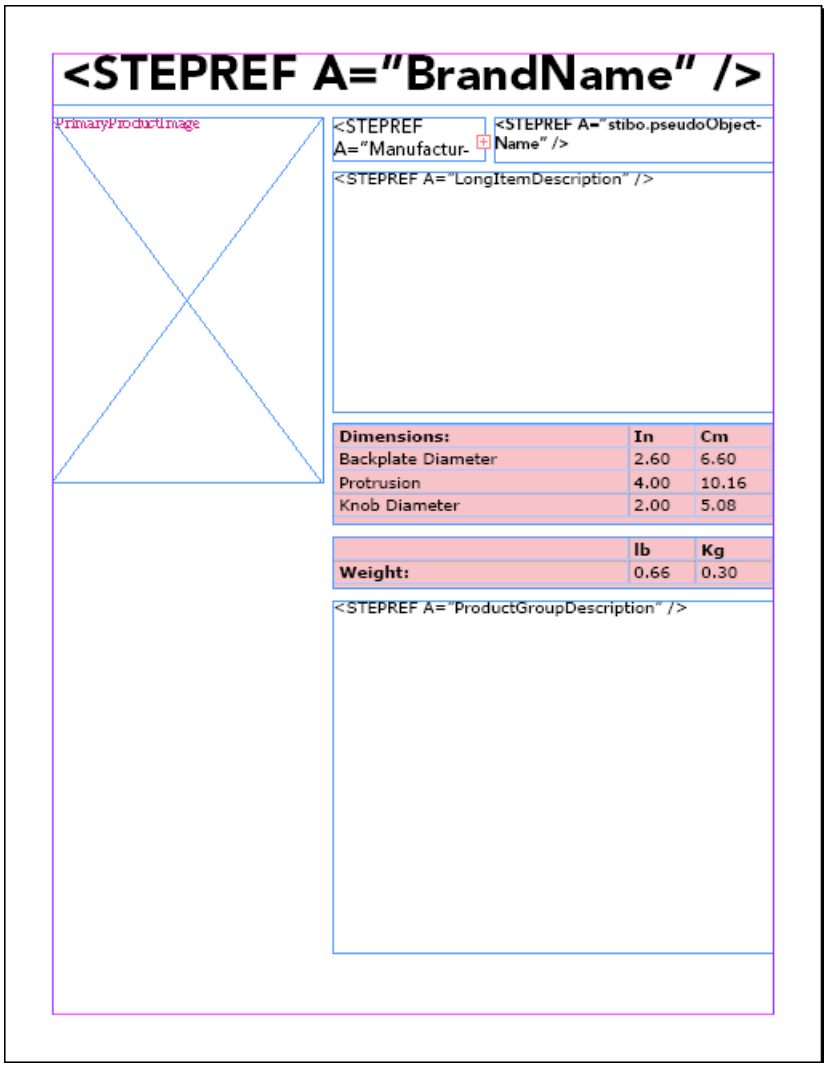
1. In InDesign, navigate to the relevant product object in the STEP Structure View.
2. Right-click the product object and choose Selection > **Convert to STEP Product Template**.



3. A 'Convert to STEP Product Template' dialog appears with an option to select a color from a dropdown list labeled **Background Colour for Unlinked Items**. If no color is desired, click OK. Otherwise, choose a color from the dropdown list. (See the 'When Page Content Cannot be Matched to STEP Content' section of this topic below for more information on how this color will be used.)



4. All content on the page that can be matched to content in STEP is converted to the corresponding asset reference and/or attribute tags.



Note: If there are multiple attributes on the product object in STEP that contain identical content to content on the sample page, STEP will randomly select an attribute to use.

When Page Content Cannot be Matched to STEP Content

For content that cannot be matched to content in STEP, the frames may optionally be shaded with a background color in order for users to recognize what still needs to be converted manually and/or removed from the page. The 'Convert to STEP Product Template' dialog that displays has a dropdown list labeled 'Background Colour for Unlinked Items.' this dropdown is populated by the colors that exist in the sample document's InDesign color swatches. As such, a custom color can be created (through the creation of a new swatch) solely for the purpose of shading the background for unlinked frames.

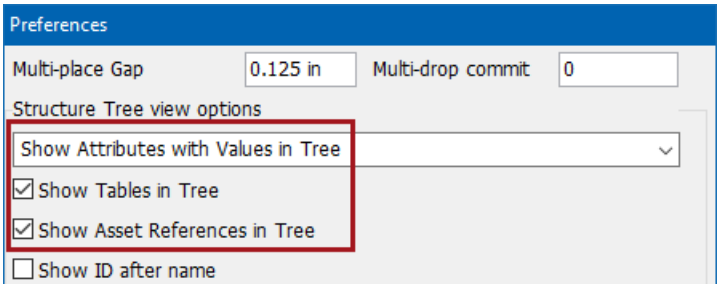
Note that, in the previous screenshot, the tables are shaded pink and have not been converted to STEP tags. Even if a STEP table exists on the product object and contains identical content to that of a table on the sample page, the table frames must be converted manually, as explained in the next section of this topic, 'Manually Converting Frames and Text to STEP Tags.'

Method 2: Manually Converting Frames and Text to STEP Tags

The **Convert to STEP Tags** feature is used to manually convert frames (and, in some instances, portions of text within text frames) on a sample page to frames that contain STEP tagging for reference types, attributes, and/or tables. To use this feature, the following elements (if applicable) must be made visible in the STEP Structure View:

- Attributes
- Tables
- Asset References

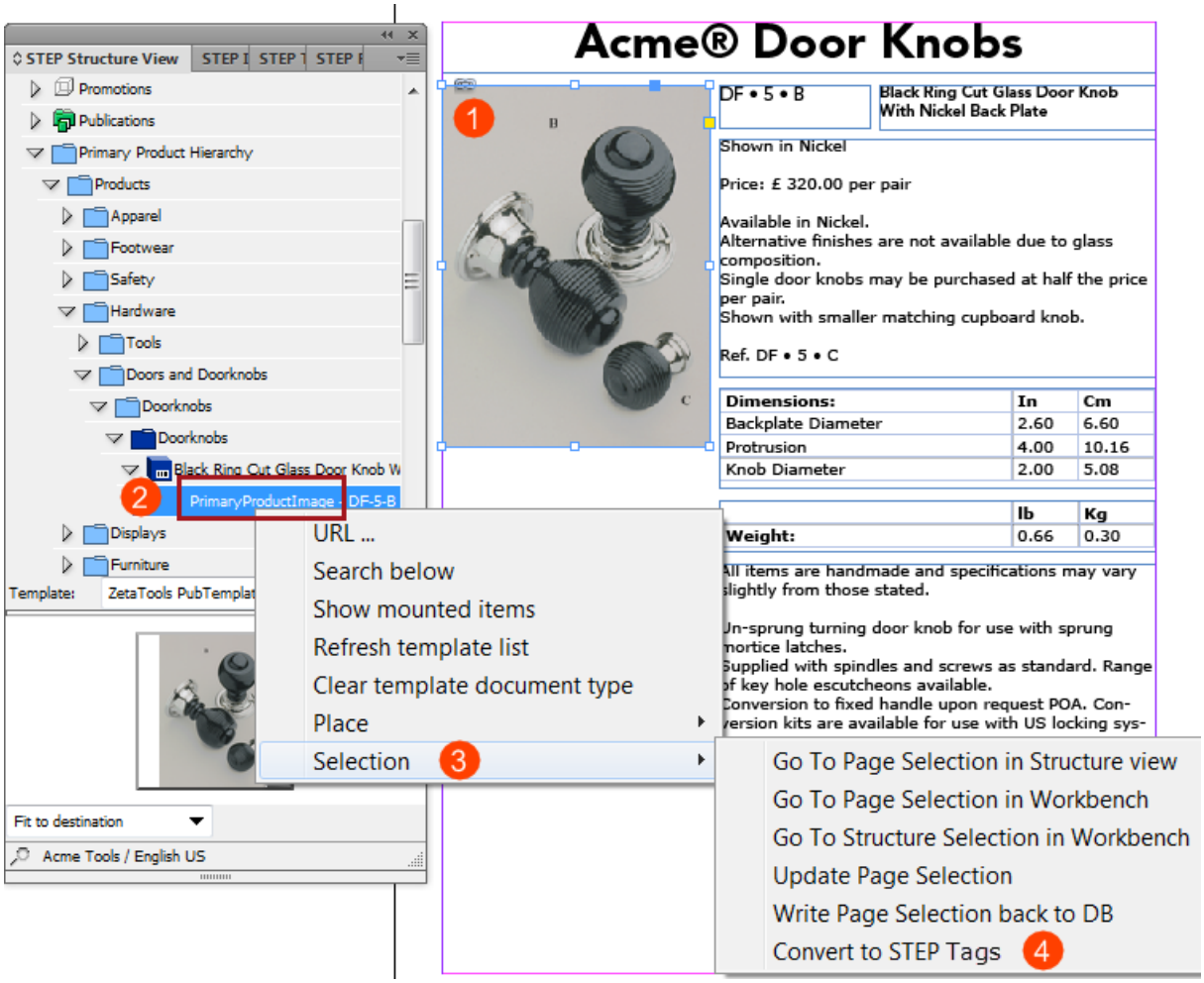
These options are selected in the 'Structure Tree view options' of the STEP **Preferences** menu. From the dropdown list, choose either 'Show all Attributes in Tree' or 'Show Attributes with Values in Tree.' Then, check the boxes for 'Show Tables in Tree' and 'Show Asset References in Tree.'



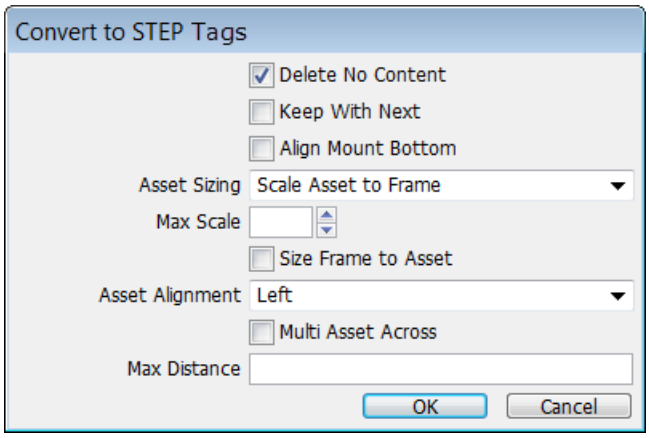
Converting Asset Frames

An asset frame on a sample document can be manually converted to a product template frame even if the image / asset on the sample page does not match any content in STEP. The process of tagging a frame with an asset reference is solely based on selecting the desired asset reference type in the STEP Structure View panel.

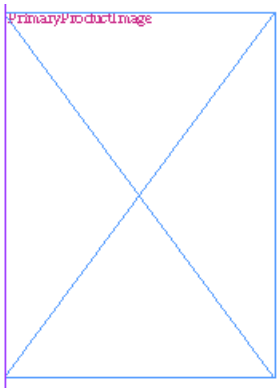
1. Select the relevant image frame on the sample document.
2. In the STEP Structure View, expand a product object (can be any product object) and select the desired asset reference type.
3. Right-click the reference type, then click Selection > **Convert to STEP Tags**.



4. A 'Convert to STEP Tags' dialog displays that contains additional options that can be applied to the asset frame, such as the settings for content deletion, sizing, scale, and alignment. You may make the relevant selections or you may set these options at a later time from the STEP Template Frame panel. Click **OK** when finished.



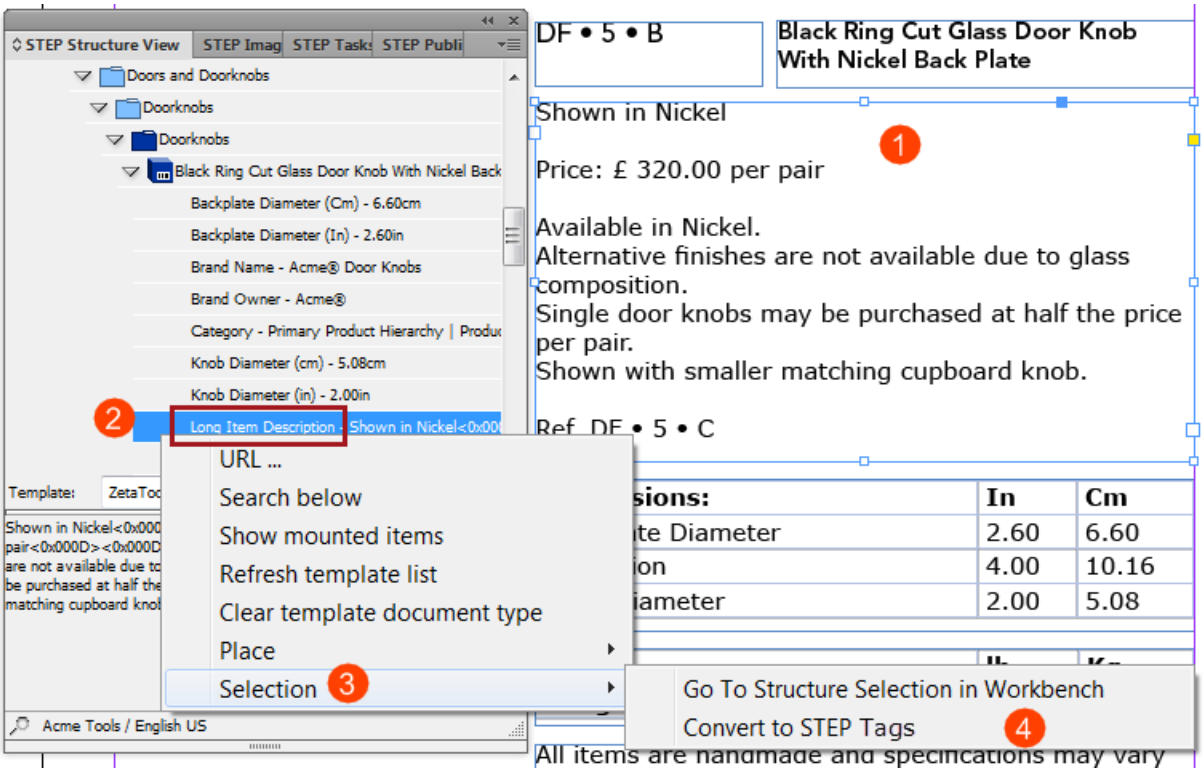
5. The asset is removed from the frame and replaced with the STEP tag for the asset reference.



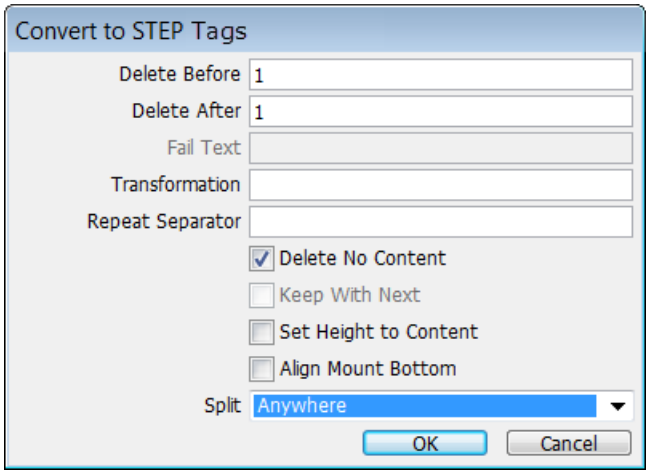
Converting Text Frames

As with converting an asset frame, a text frame on a sample document can be manually converted to a product template frame even if the text within the frame does not match any content in STEP. The process of tagging a frame with an attribute tag is solely based on selecting the desired attribute in the STEP Structure View panel.

1. Select the relevant text frame on the sample document.
2. In the STEP Structure View, expand a product object (can be any product object) and select the desired attribute.
3. Right-click the attribute and choose Selection > **Convert to STEP Tags**.



4. A 'Convert to STEP Tags' dialog displays that contain options that can be applied to both the entire frame or the attribute tag itself, such as Delete Before / Delete After and Transformation (which apply to the tag) and Delete No Content and Split (which apply to the frame). You may make the relevant selections, or, you may set these options at a later time from the STEP Template Frame and/or STEP Template Content panels. Click **OK**.



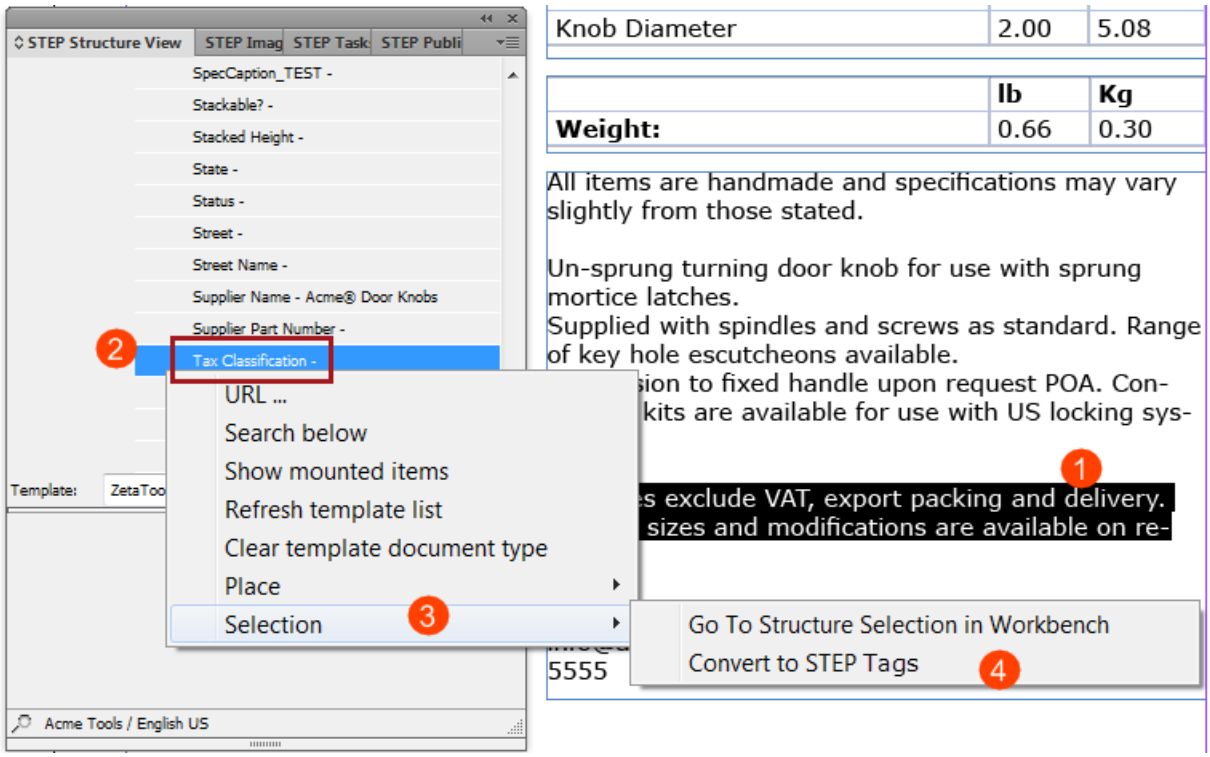
5. The original text is removed and replaced with the STEP tag for the attribute.

<STEPREF A="LongItemDescription" />

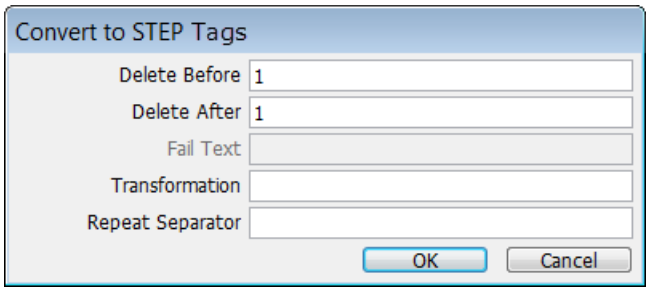
Converting Partial Text Within Frames

As with converting entire text frames, attributes must be visible in the STEP Structure View tree in order to convert partial text to STEP tags.

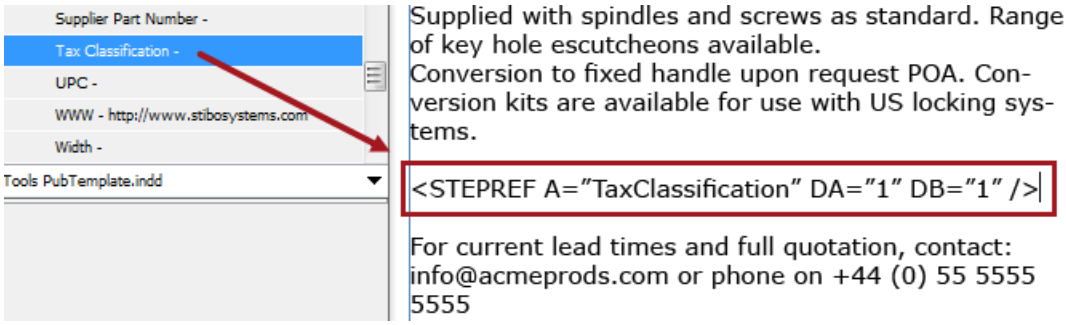
1. In a text frame, highlight the selection of text that you would like to convert to an attribute tag.
2. In the STEP Structure View, expand a product object (can be any product object) and select the relevant attribute.
3. Right-click the attribute and choose Selection > **Convert to STEP Tags**.



4. A 'Convert to STEP Tags' dialog displays containing options that can be applied to the attribute tag, such as Delete Before / Delete After, Fail Text, and Transformation. You may make the relevant selections or you may set these options at a later time from the STEP Template Content panel. Click **OK** when finished.



5. The original text is removed and replaced with the STEP attribute tag.



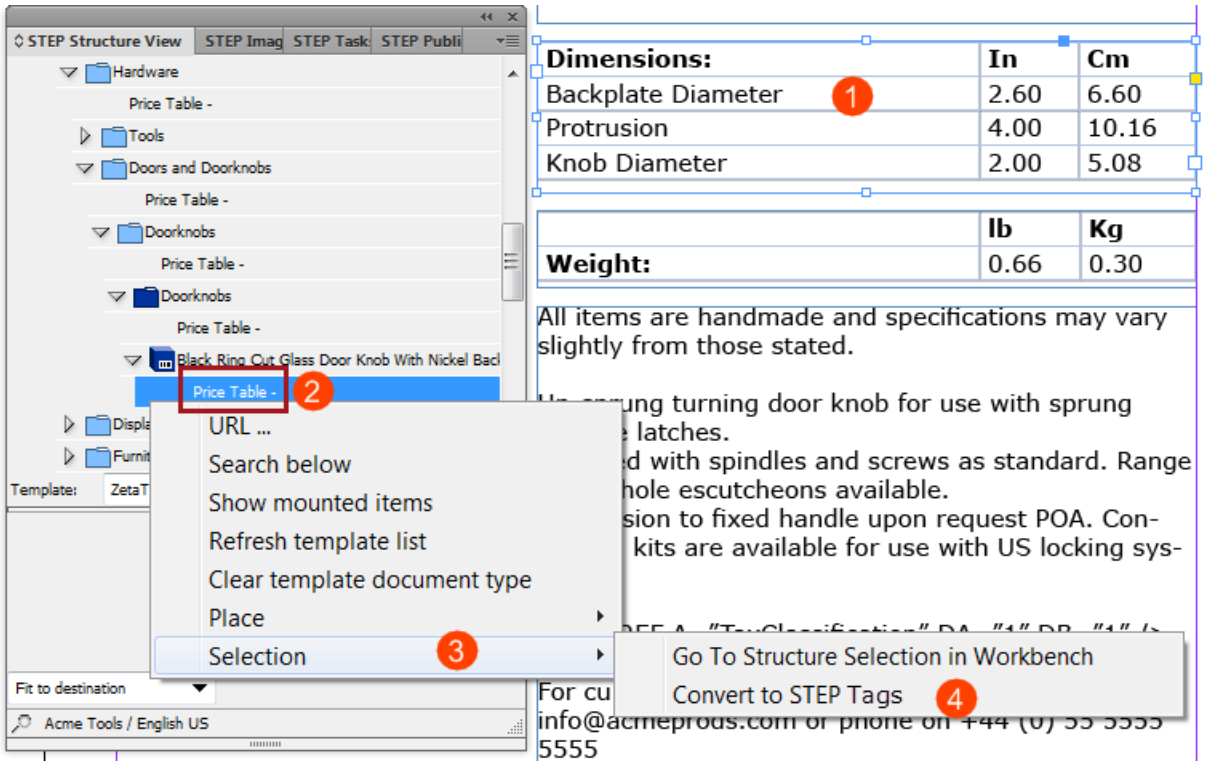
Converting Frames to STEP Table Tags

As with asset reference types and attributes, table tags must be visible in the STEP Structure View tree to use 'Convert to STEP Tags.'

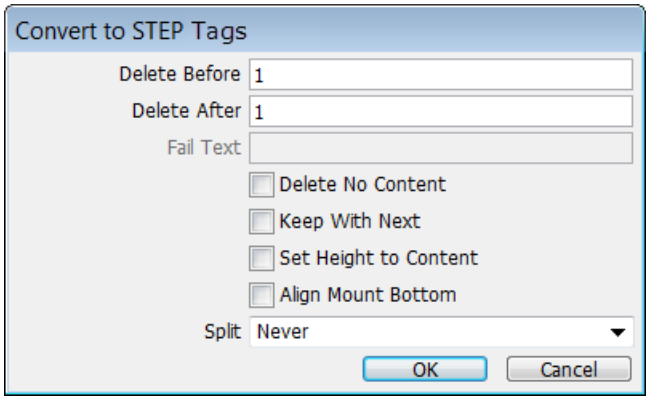
An entire text frame, or partial text within the frame, can be converted to a table tag. Note that a table tag can be placed in any text frame; the frame does not have to already contain a table.

The following steps outline how to convert an entire frame to a frame containing a table tag.

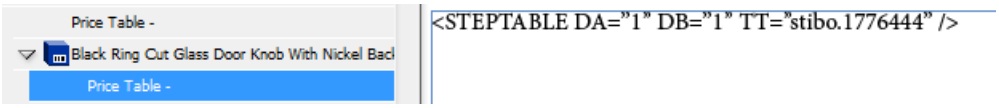
1. Select the relevant text frame or text on the sample document.
2. In the STEP Structure View, expand a product object (can be any product object) and select the desired table type.
3. Right-click the table tag and choose Selection > **Convert to STEP Tags**.



4. A 'Convert to STEP Tags' dialog displays containing options that can be applied to both the frame and the table tag, such as Delete No Content, Delete Before / Delete After, and Split. You may make the relevant selections or you may set these options at a later time from the STEP Template Frame and/or STEP Template Content panels. Click **OK**.

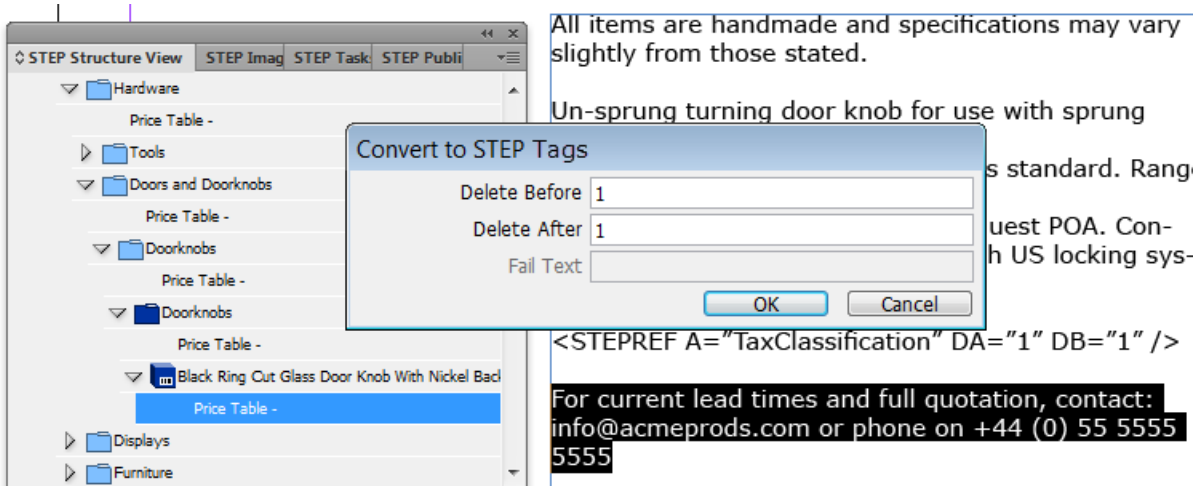


5. The original text is removed and replaced with the STEP table tag.

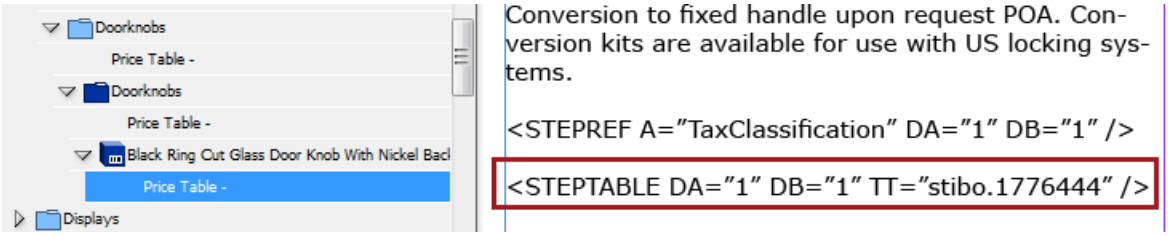


Converting Partial Text to a Table Tag

The same method used for converting partial text (explained in the previous 'Converting Partial Text Within Frames' section of this topic) can be used to convert text to a table tag, except a more limited 'Convert to STEP Tags' dialog appears after clicking Selection > **Convert to STEP Tags**.



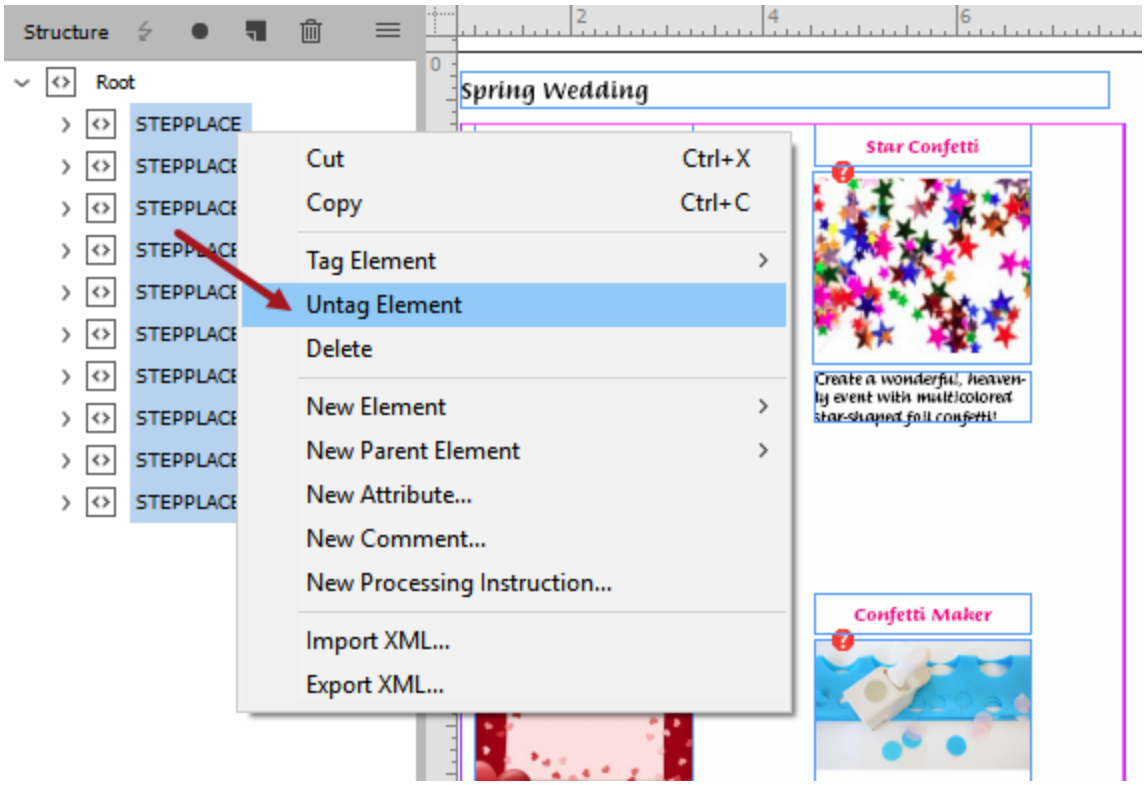
As with attributes, the selected text is removed and replaced with the table tag.



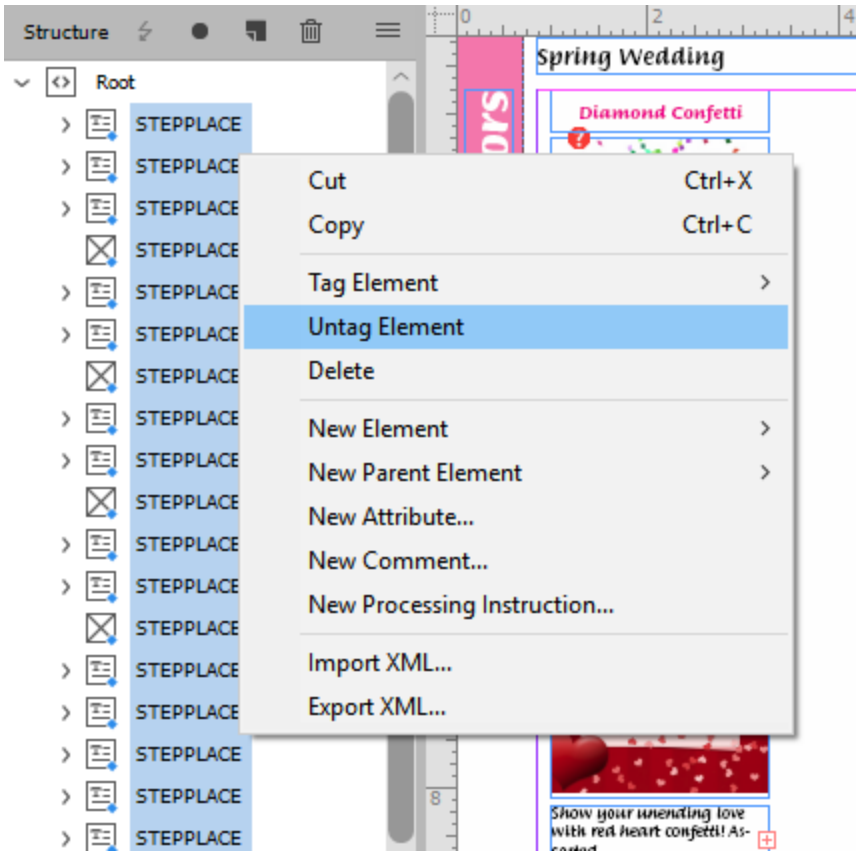
Alternate Method – Creating a Template From a Previously Mounted Page

The following steps describe a method of taking an existing *mounted* page, created from STEP, then converting it to a sample document that can in turn be converted to a product template using the steps outlined in this topic above. Using InDesign functionality, this method strips the STEP tags from the frames on a mounted page, leaving behind the content but with no connection to objects or attributes in STEP.

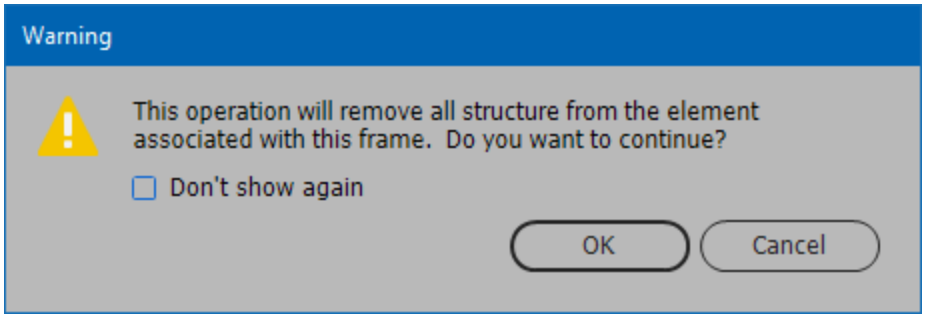
1. Open your mounted page in InDesign, then open the InDesign XML Structure (View > Structure > **Show Structure**).
2. Expand the Root tag to display all of the **STEPPLACE** tags below.
3. Select all STEPPLACE tags, then right-click and select **Untag Element**.



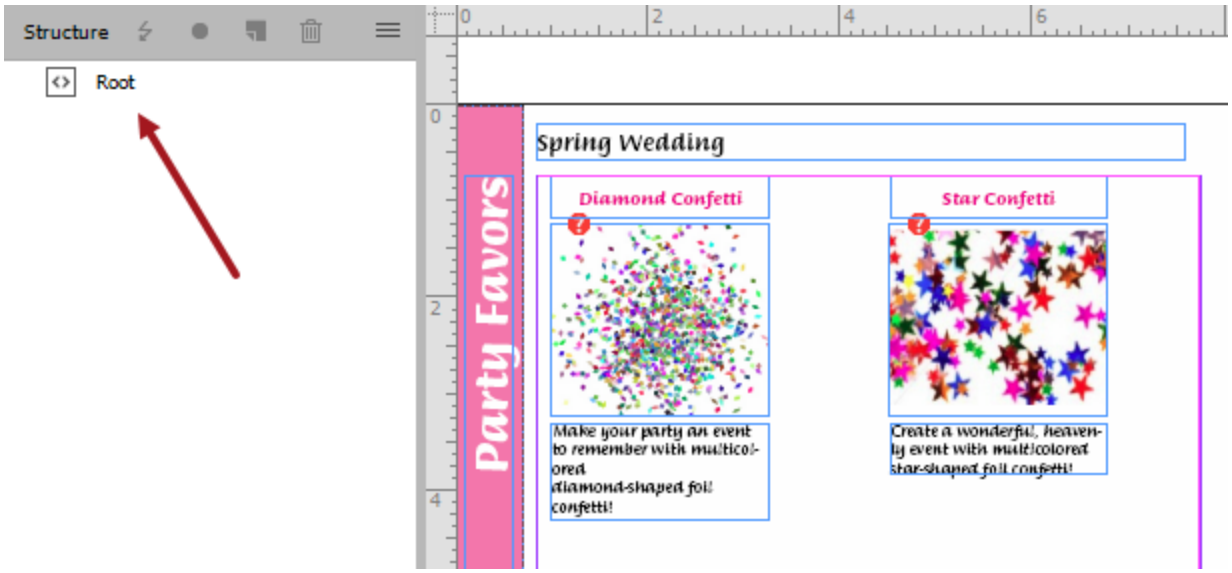
4. The parent STEPPLACE tags will expand to reveal the individual STEPPLACE mounted elements (text and images). Select all of these tags, then right-click and select **Untag Element** again.



5. In the Warning dialog that displays ('This operation will remove all structure from the element associated with this frame ...'), click **OK**.



6. The untagged page that remains has no more connection to content in STEP. This document can now be treated as any regular sample document and converted to a product template. Or, the elements (images and text) can be manually removed from inside the frames and STEP tags can be manually added using the STEP Template Content and/or STEP Template Frame tags.


Structure
Root
Party Favors
Spring Wedding
Diamond Confetti
Make your party an event to remember with multicol-ored diamond-shaped foil confetti!
Star Confetti
Create a wonderful, heaven-ly event with multicolored star-shaped foil confetti!

Default InDesign Product Templates

Default product templates can be assigned to **product**, **product-override, entity**, and **classification** objects in the workbench by setting the value of **InDesign Template Allowed** to 'Yes' on the corresponding object types in System Setup. Default templates are assigned to these objects so that:

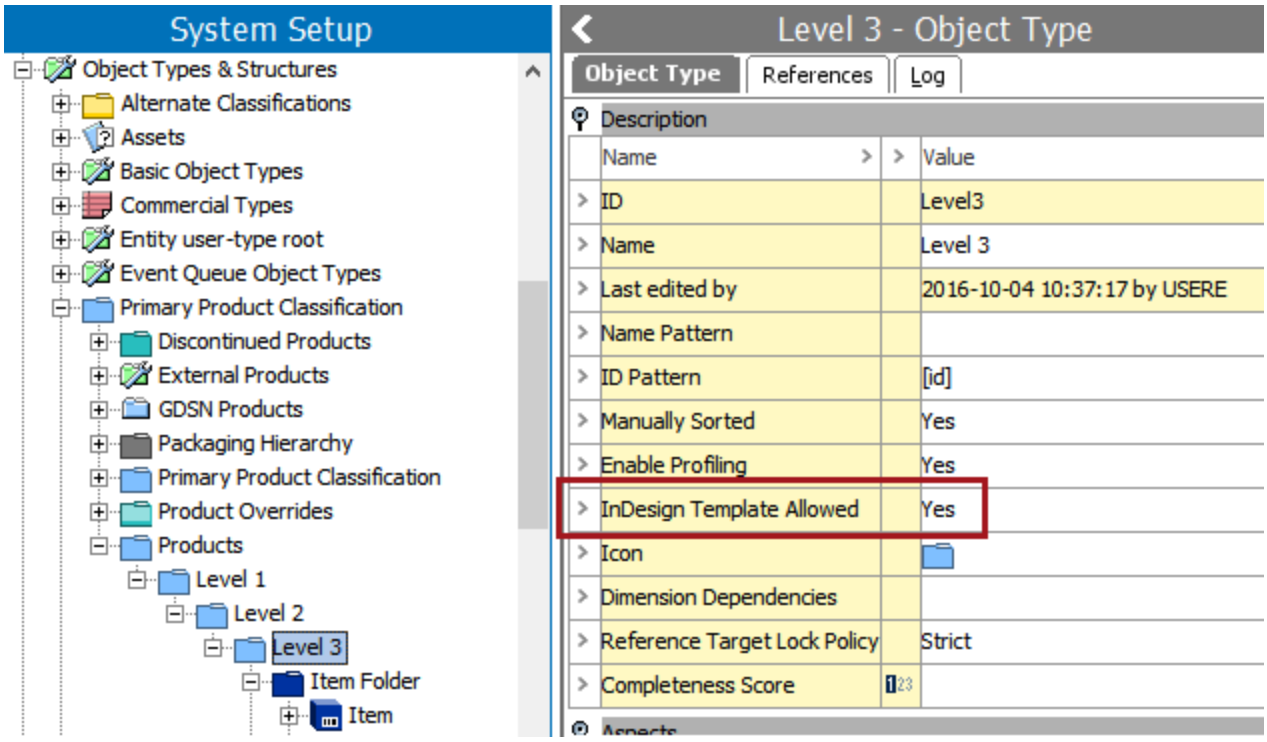
- A default product template can be set at a higher node in the product, classification, or entity hierarchy and inherited by lower nodes
- Templates do not have to be stored locally when mounting pages using 'drag-and-drop' operations in InDesign
- Publication rules can be configured to use the default templates that are assigned, eliminating the need to assign product templates to Flatplanner frames or create additional pagination rules to drive product layouts

Note: The 'InDesign Template Allowed' field is only visible in STEP systems with a STEP Publisher license.

Configuring Object Types to Allow Default Product Templates

Before an object can be assigned a default InDesign product template, it must first be configured to display the 'Default InDesign template' field under the **Description** flipper on the Product / Classification / entity object type name tab. To set this up:

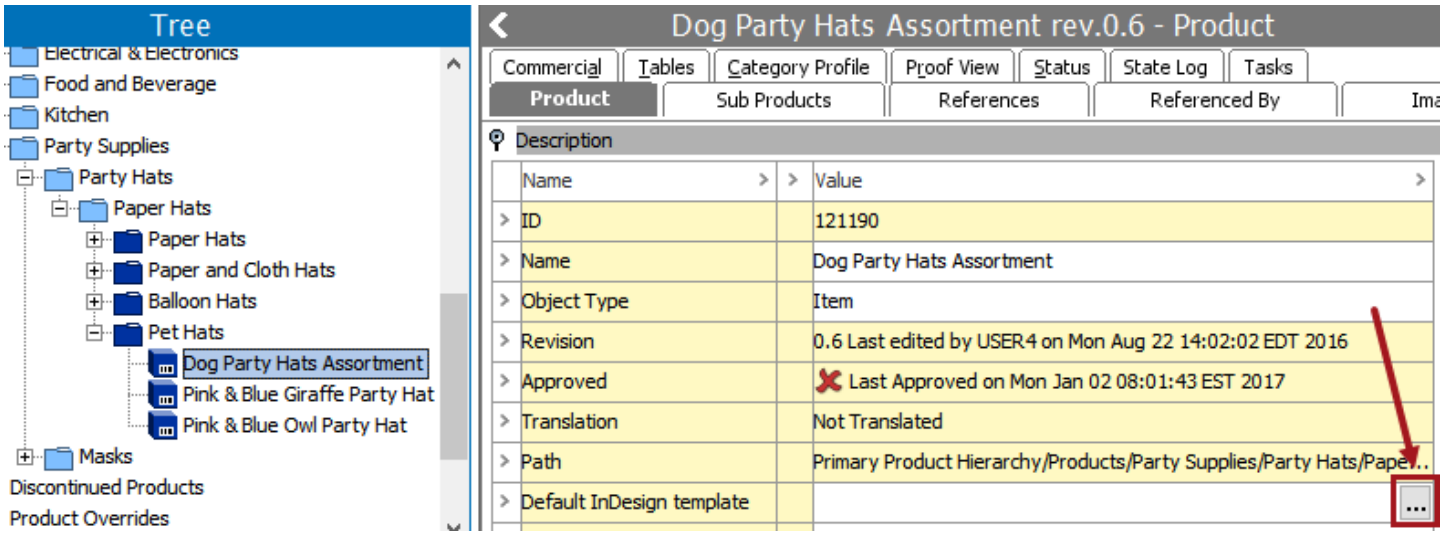
1. Locate the relevant object type in **System Setup**.
2. With your object type selected, go to the **Object Type** tab and expand the **Description** flipper.
3. In the **InDesign Template Allowed** field, select 'Yes' from the dropdown list.



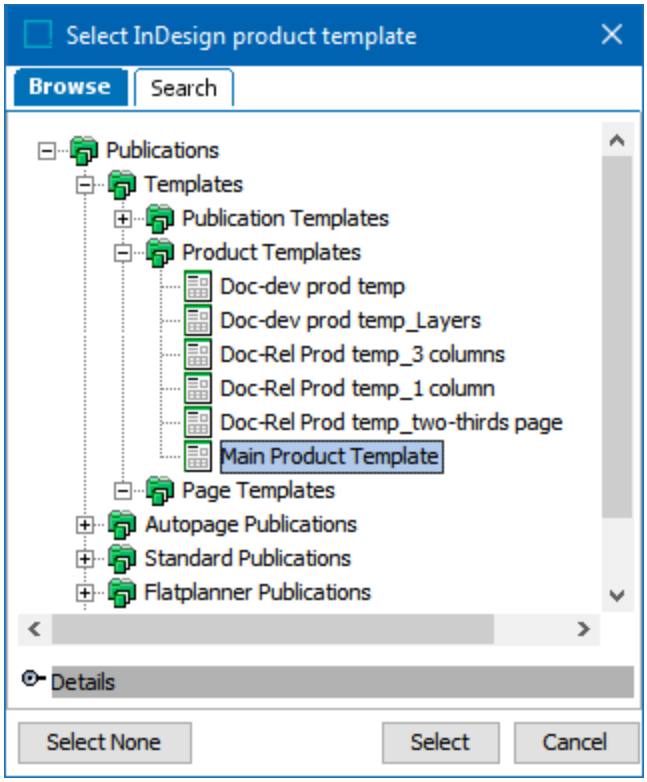
4. After enabling an object type to allow a default InDesign template, a default product template can be assigned to any object of the selected object type in the Tree.

Assigning a Default InDesign Product Template

1. In the workbench, navigate to your object in the Tree and go to the Product / Classification / entity object type name tab.
2. Under the Description flipper, go to **Default InDesign template** and click the ellipsis button (...).

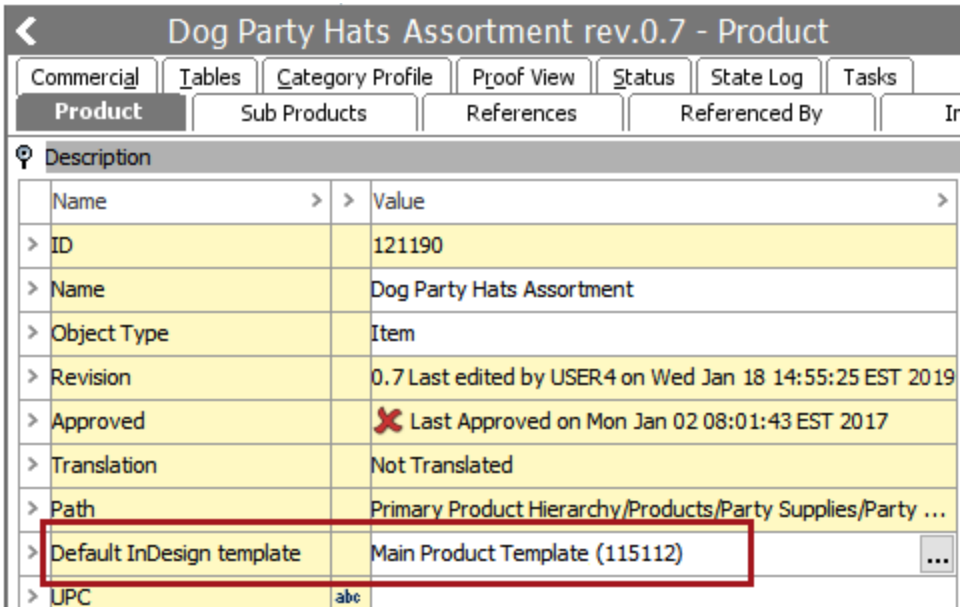


3. In the **Select InDesign product template** dialog, browse to or search for the template that you would like to set as the default, then click **Select**.



> **Note:** If you have already selected a default product template and want to remove it, click **Select None** from the dialog.

4. The product template is set as the default.



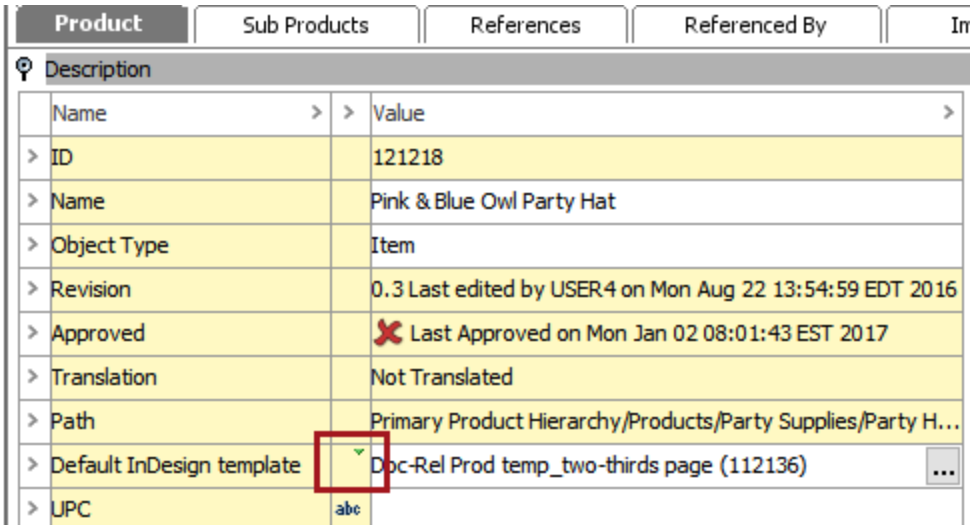
Note: Default InDesign templates can also be assigned to products using the Proof View component in **Web UI**. See the **Configuring the Web UI Proof View Component** topic in the **Proof View** section of this guide.

Default Product Template Inheritance

Default InDesign templates can also be inherited from higher nodes in the product, classification, and entity hierarchies, saving time and effort in assigning a default template to multiple objects.

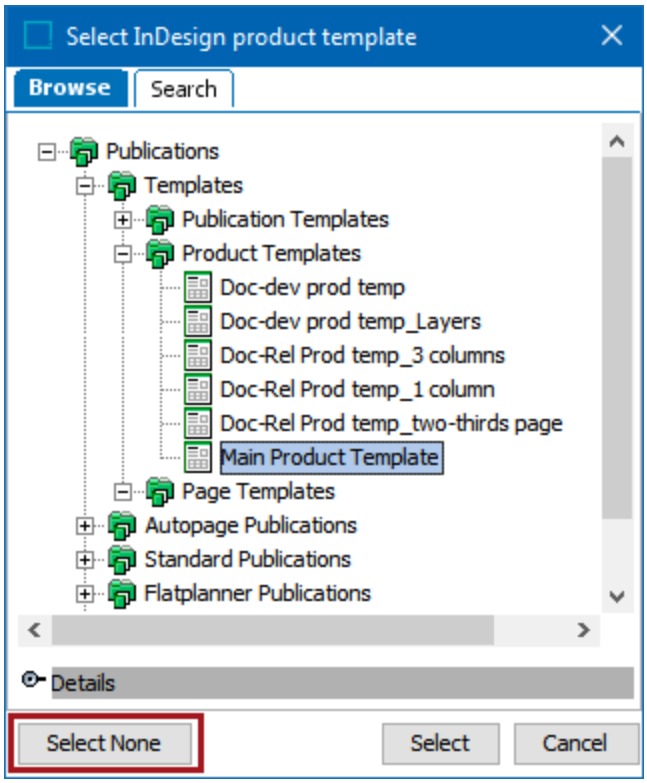
Note: Both parent and child objects must be configured to accept default InDesign templates before templates can be inherited.

A small green arrow to the left of the template field indicates that the template is inherited.



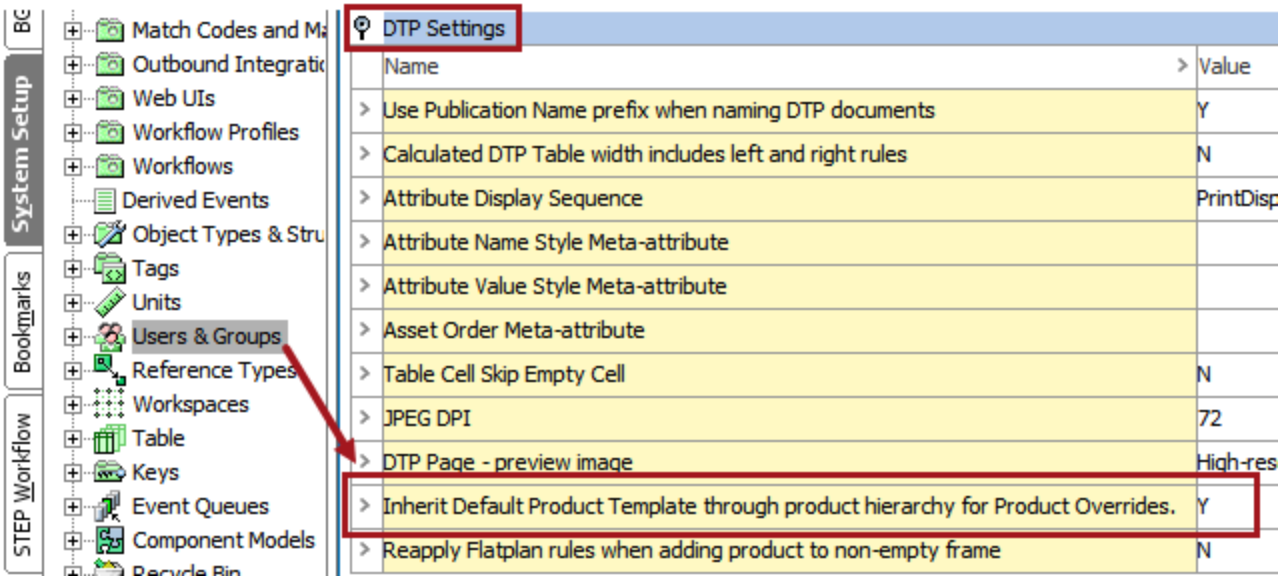
The inherited template can be overridden with another one by following the steps in the previous section of this topic, Assigning a Default InDesign Product Template.

To revert back to the inherited template, click the ellipsis button (...) in the Default InDesign template field, then click **Select None** in the 'Select InDesign product template' dialog.

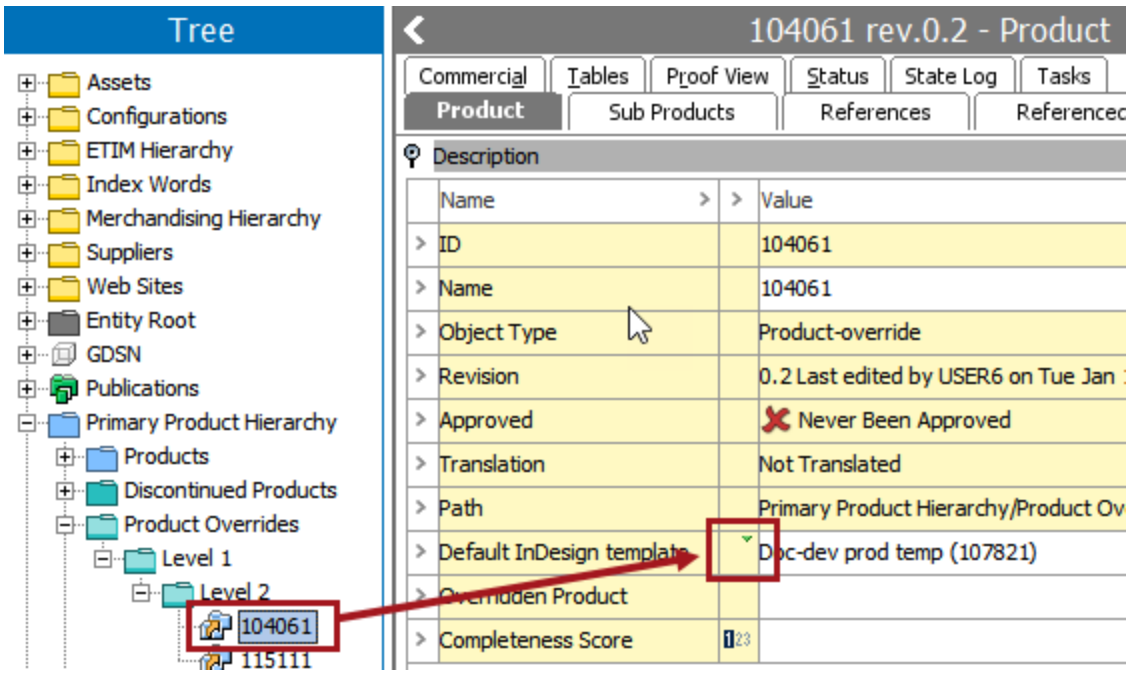


Default Product Template Inheritance for Product Overrides

By default, product overrides do not inherit default product templates from the product hierarchy. This behavior can be reversed by changing the **Inherit Default Product Template through product hierarchy for Product Overrides** setting to 'Y'. This setting is located under the **DTP Settings** flipper on the System Settings tab, located under System Setup > Users and Groups.



The following screenshot shows a product-override object with a product template inherited from its Level 2 parent object.



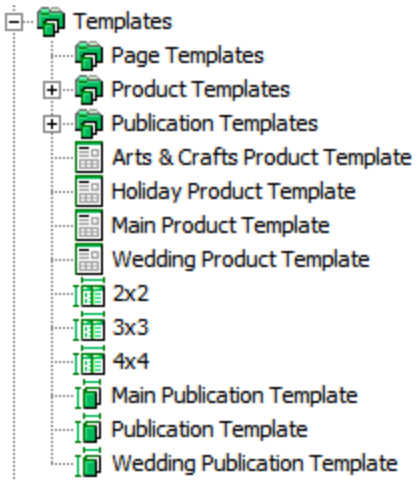
Sorting Templates in STEP

The sorting of publication templates, product templates, and page templates in the STEP Workbench Tree is determined by the **Manually Sorted** setting on the publication group object type in which templates are stored (which is typically 'Publication group root').

Automatic Sorting

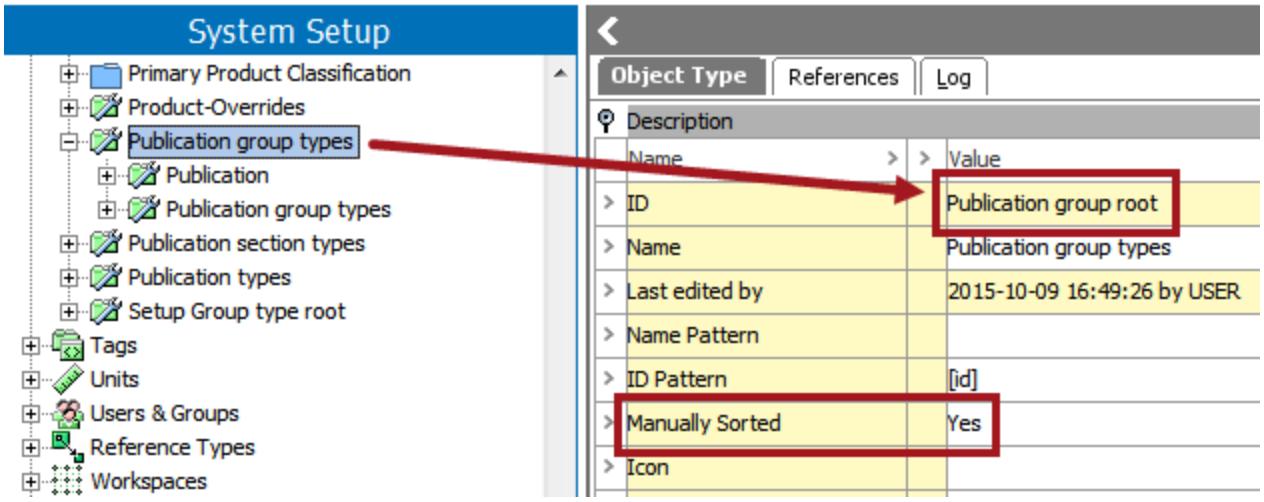
If **Manually Sorted** is set to **No** on the publication group object type, all template types shown in the STEP Workbench Tree are grouped by type, with alphabetical sorting applied within each group. The default sort order is as follows:

1. Product templates (in alphabetical order)
2. Page templates (in alphabetical order)
3. Master (publication) templates (in alphabetical order)

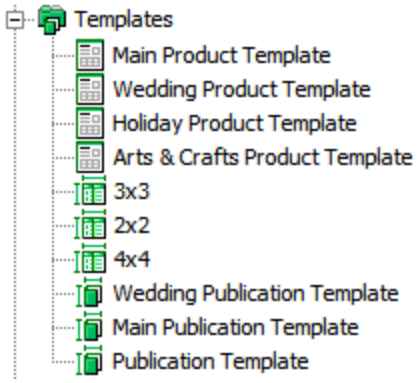


Manual Sorting

If **Manually Sorted** is set to **Yes** on the publication group object type, templates may be sorted in a non-alphabetical order. No additional configurations are required, as publication templates, product templates, and page templates are not included as object types in System Setup.



Note: Manually sorted templates still remain grouped by type (product, page, and publication) within the publication group folder that contains them.



For more information about object type sorting in STEP, see the **Manually Sorted** section of the **System Setup / Super User Guide** documentation.

Mounting Pages in STEP Publisher

This documentation section describes the basic functionality of mounting one or more objects onto a publication template / mounting page by the 'drag-and-drop' method using a STEP Publisher product template. When using a product template, you can mount one or several objects onto the page in one operation.

This section does not explain:

- How to mount objects using version layers. See the **Mounting Products to Version Layers** topic for more information.
- How to create and configure publication templates or product templates. See the **Publication Templates** topic and the **Product Templates** topic for more information.
- How to mount objects using **Flatplanner** and **AutoPage**. See the respective user guides for these components for more information.
  - **Flatplanner** user guide
  - **AutoPage** user guide

Note: Though objects other than products can be mounted onto InDesign pages from STEP (including classification folders, entities, and green publication hierarchy objects themselves), the subtopics in this documentation will frequently refer to InDesign page layouts as 'product presentations' and objects to be mounted as 'products.' This is to streamline and genericize the language used in presenting this information.

This topic assumes that:

- You have already installed your STEP'n'design plugins and have connected to the relevant STEP environment from within InDesign.
- You have already created and configured a product template and publication template.
- You have already created a publication along with its relevant versions in the STEP Workbench.
- You have a working knowledge of the STEP Structure View panel. For more information on this panel, see the **STEP Structure View** topic.

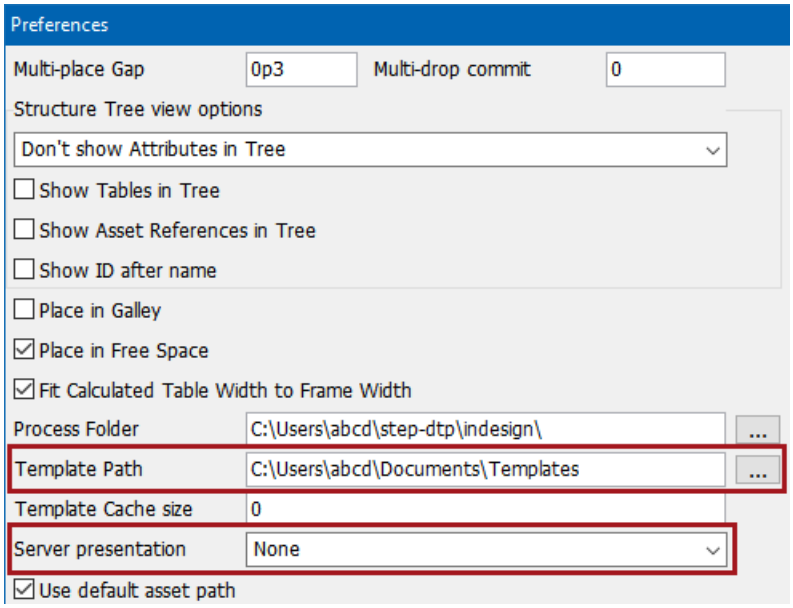
Setting Template Preferences and Selecting a Version

This topic explains how to set your product template preferences in the STEP Preferences menu in InDesign and how to select a publication version to use when mounting your pages. Both of these steps are prerequisites to being able to mount objects onto pages.

Setting Product Template Preferences in the STEP Preferences Menu

Before mounting products, you must determine what product template to use. The initial steps of the selection process are configured in the STEP **Preferences** menu. The settings chosen vary on whether you will be using product templates stored locally on your computer or product templates stored in STEP.

The relevant settings that determine which product templates are used in mounting are **Template Path** and **Server presentation**.

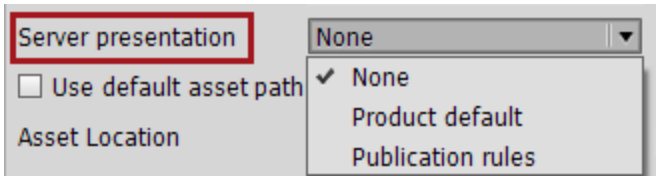


To set these preferences, follow these steps:

1. In InDesign, navigate to STEP > Preferences to open the **Preferences** menu.
2. If you will be mounting products using locally stored product templates, enter the path to the folder / directory where your product templates are stored in the **Template Path** field. If you want to always mount products using locally stored templates, then select **None** from the **Server Presentation** list.

Note: Choosing **None** ensures that your product will always mount with the local template chosen from the 'Template' dropdown in the STEP Structure View panel and override the default product template applied to the product in STEP, if any.

3. To use product templates stored in STEP, select one of the following from the **Server Presentation** list:



- **Product Default**: Choose this to mount your product to the page using the default product template assigned to it in STEP, regardless of what template is chosen locally from the **Template** dropdown list in the STEP Structure View panel. If the product you are mounting does *not* have an assigned default template, then the product will mount using the locally selected product template.

  For information on how to assign a default product template, see the **Default InDesign Templates** topic.

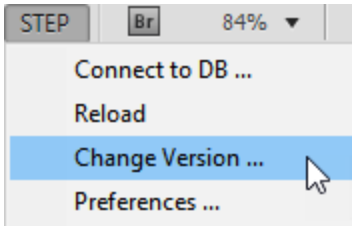
- **Publication rules**: Choose this to mount products using the product template specified by the Object Layout pagination rules in STEP. When you choose a publication version to mount, the publication rules exist on the publication or publication section of the corresponding publication.

Selecting a Version

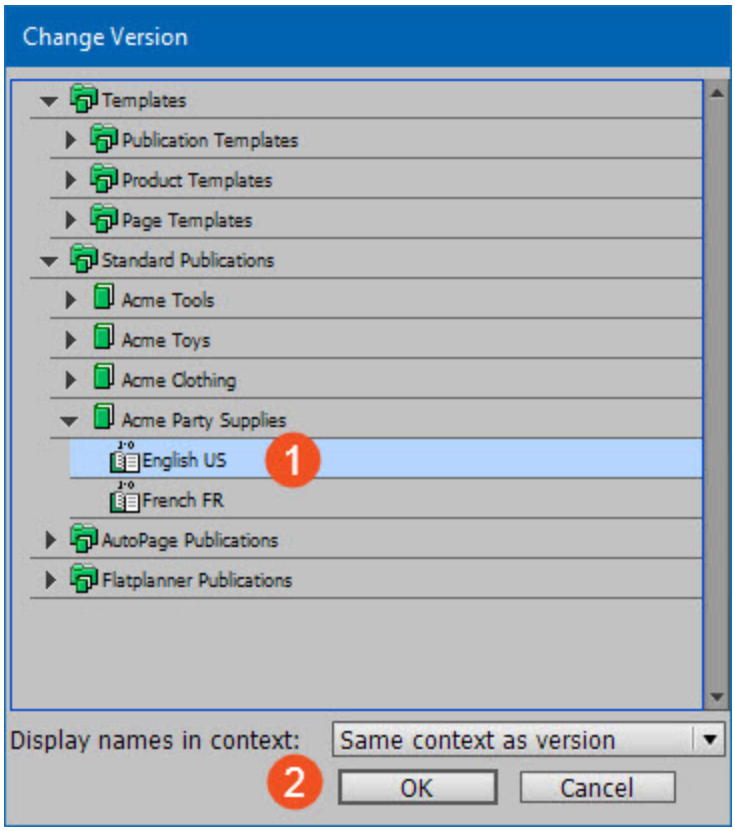
Before mounting a product, you must always designate from what publication **version** you will be mounting data. This is important because the system needs to know not only what publication you are building but from what context and workspace the product data should be pulled. You can either make a one-time selection of a publication version, if you are certain that this is the version that you will be working with for an extended time, or you may configure STEP Publisher to prompt you to choose a version every time you mount a product. Having the system prompt you for a version may be helpful if you plan to work with multiple versions or multiple publications in one sitting.

To choose a publication version, and/or change the publication version in which you are currently working, follow these steps:

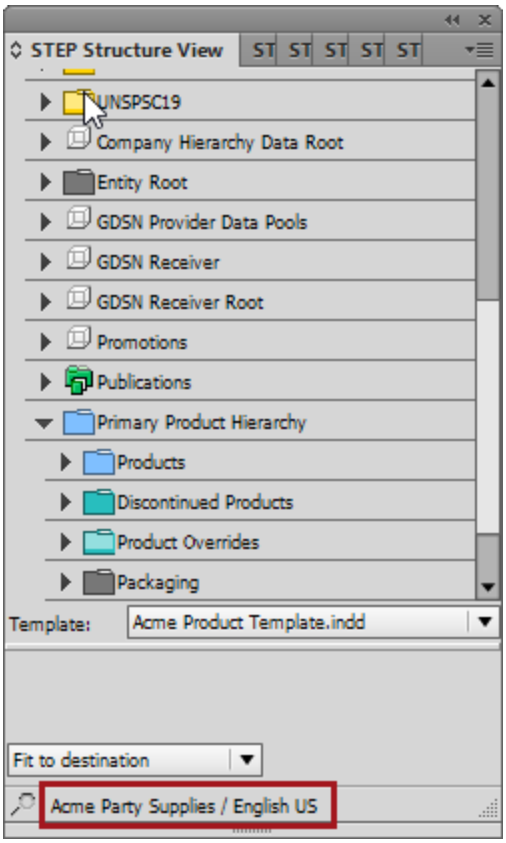
1. In InDesign, Navigate to STEP > **Change Version ...**.



2. On the **Change Version** dialog that displays, navigate to the publication version that you would like to use, then click **OK**.



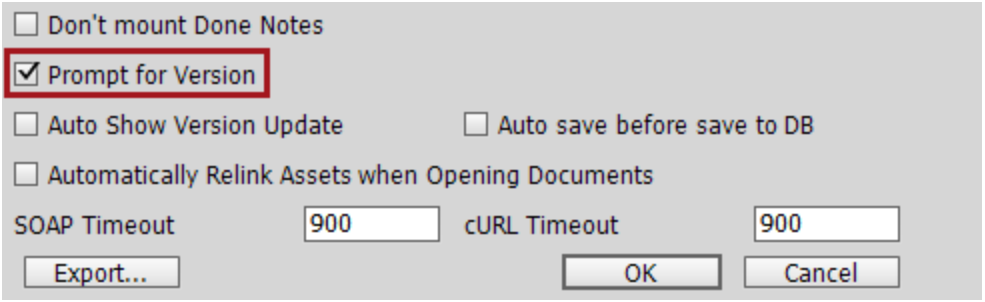
3. The selected version displays at the bottom of the STEP Structure View.



Prompt for Version

To have STEP Publisher prompt for a version every time you mount a product:

1. In InDesign, navigate to STEP > Preferences to open the **Preferences** menu.
2. Check the **Prompt for Version** box, then click **OK** to close the Preferences menu.



Mounting Objects to Pages

This topic provides a general overview of how to mount objects onto InDesign pages using the STEP Publisher 'drag-and-drop' method. The provided examples use **product** and **entity** objects.

Though objects other than products and entities can be dragged and dropped onto InDesign pages from STEP (including standalone assets, classification folders, and green publication hierarchy objects), they are not covered in this topic since the drag-and-drop method is the same, and their use is less common.

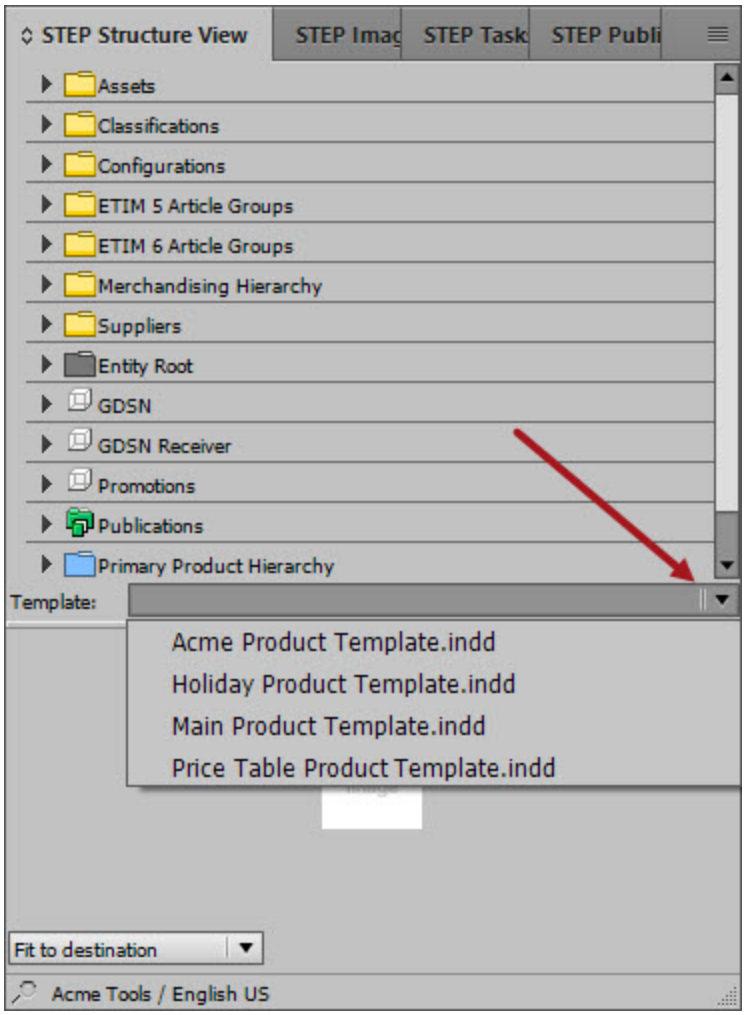
This topic assumes that you have already set your template preferences in the STEP Preferences menu and have selected a publication version to use for mounting. For more information on these preliminary steps, see the preceding topic in this guide, **Setting Template Preferences and Selecting a Version**.

Mounting a Product

To mount a product onto an InDesign page, follow these steps.

1. Open the STEP Structure View panel by navigating to Window > **STEP Structure View**.
2. If using locally stored product templates, select the product template that you would like to use from the **Template** list at the bottom of the panel.

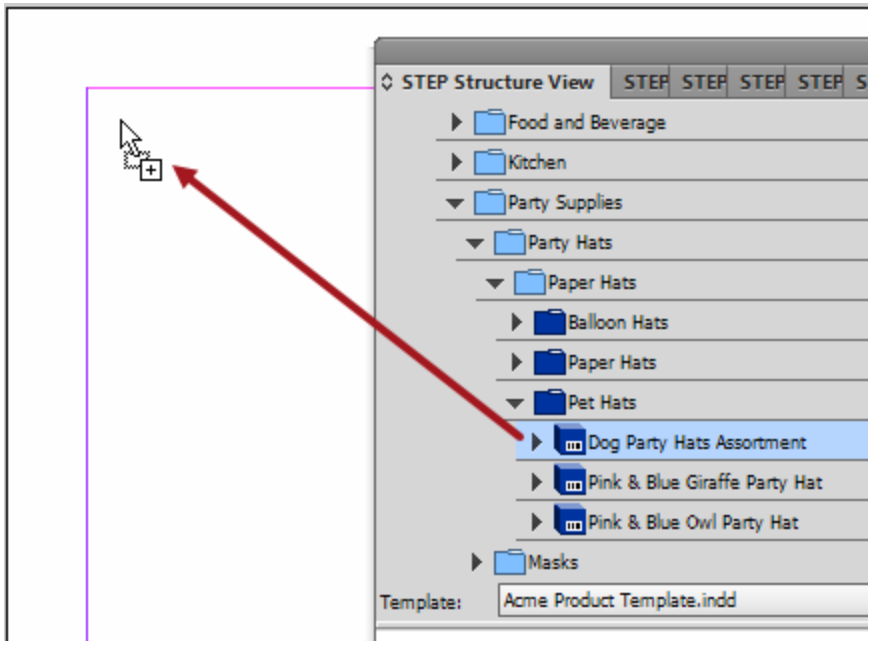
> **Note:** The product templates in the dropdown list are the templates stored in the **Template Path** folder designated in the STEP Preferences menu.



3. In the STEP Structure View tree, locate the object that you would like to mount.

   To locate an object in the STEP Structure View, either browse through the tree or click on the magnifying glass icon in the lower left corner of the panel to display the **Search** dialog. The Search dialog can also be accessed by clicking the **Options** dropdown arrow in the upper right corner of the panel.

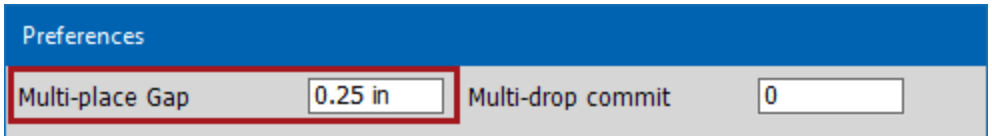
4. Select the object, then hold down the left button of your mouse while you drag it to the desired location on the page.



5. To mount several products in one operation, hold down Ctrl or Shift while making your selections in the STEP Structure View tree. Products will be mounted sequentially.

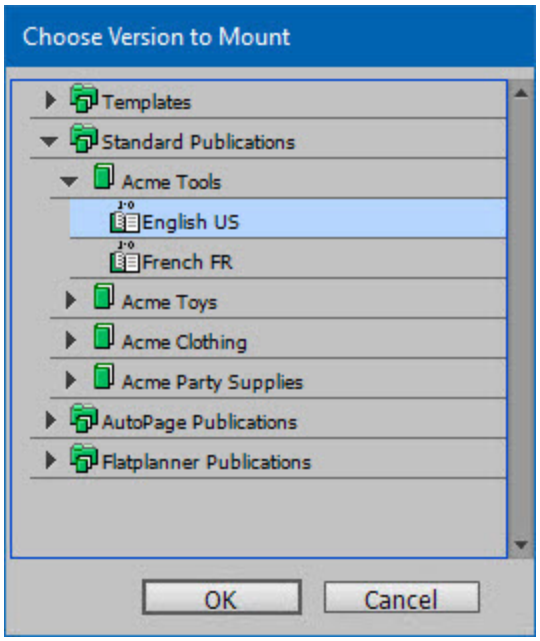
   Note: Your multi-selection must be within the same classification or product family. Additionally, if not using pagination rules, all products will use the same product template. For information on how to mount objects using pagination rules, see the **Mounting Objects Using Pagination Rules** topic.

   A gap will be placed between the products based on what was entered in the **Multi-place Gap** field in the STEP Preferences menu.

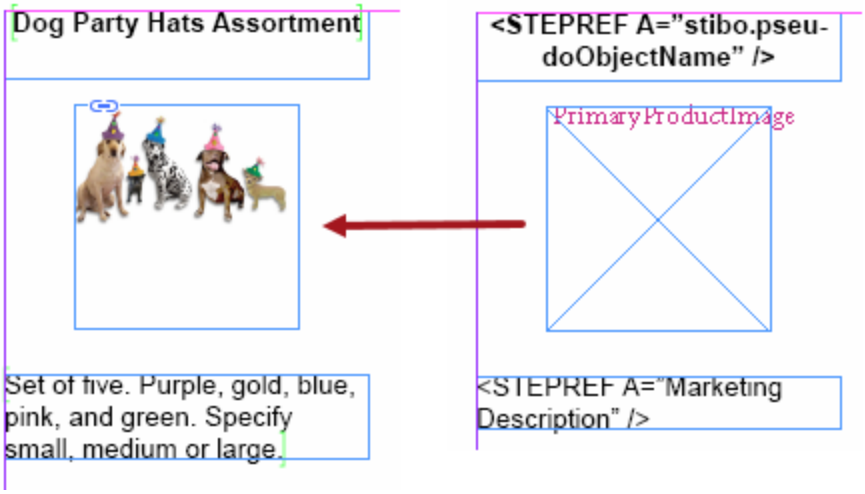


   If the product data exceeds the available space on the column or page or column, STEP Publisher can be configured to flow the data into next column or page by splitting a frame, or group of frames, across the column or page. These split settings are applied to product template frames on the STEP Template Frame panel. See the **STEP Template Frame** panel topic for more information.

6. Release the mouse button where you would like to drop the product onto the page.
7. If you selected 'Prompt for Version' in the STEP Preferences menu, the **Choose Version to Mount** dialog will display when you release the left button of your mouse. Select the desired version, then click **OK** to close the dialog and mount the product.



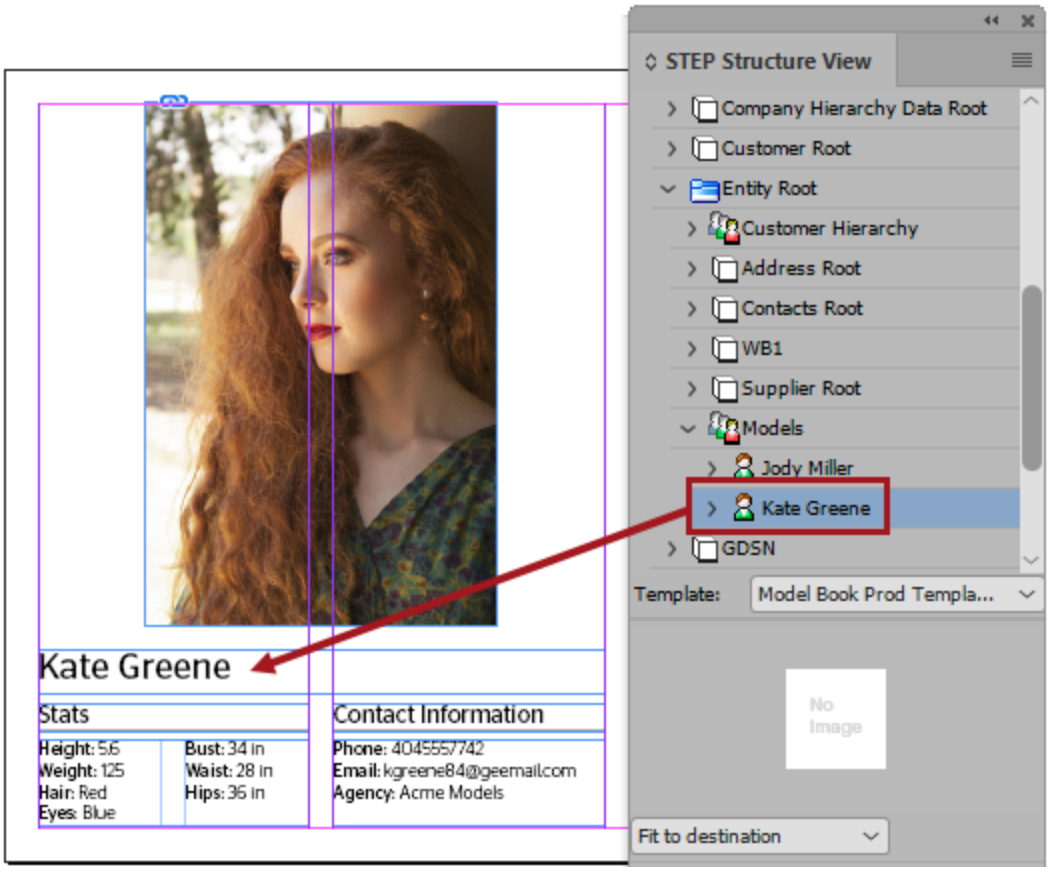
8. Once dropped, the product is mounted to the page, using the layout and formatting from the product template.



Mounting an Entity

Entities are used in STEP Publisher to publish non-product data such as people information (e.g., customer data), businesses (e.g., retail store locations, floor plans, opening hours), and 'technology / feature' objects linked to products in catalogs (e.g., quality standards, care instructions, materials). The 'drag-and-drop' steps for mounting an entity to an InDesign page are the same as those for mounting a product.

The below example shows an entity directly mounted to an InDesign page and contains information related to a fashion model (including height, weight, and hair color). It is also referenced to an image asset (a modeling headshot).

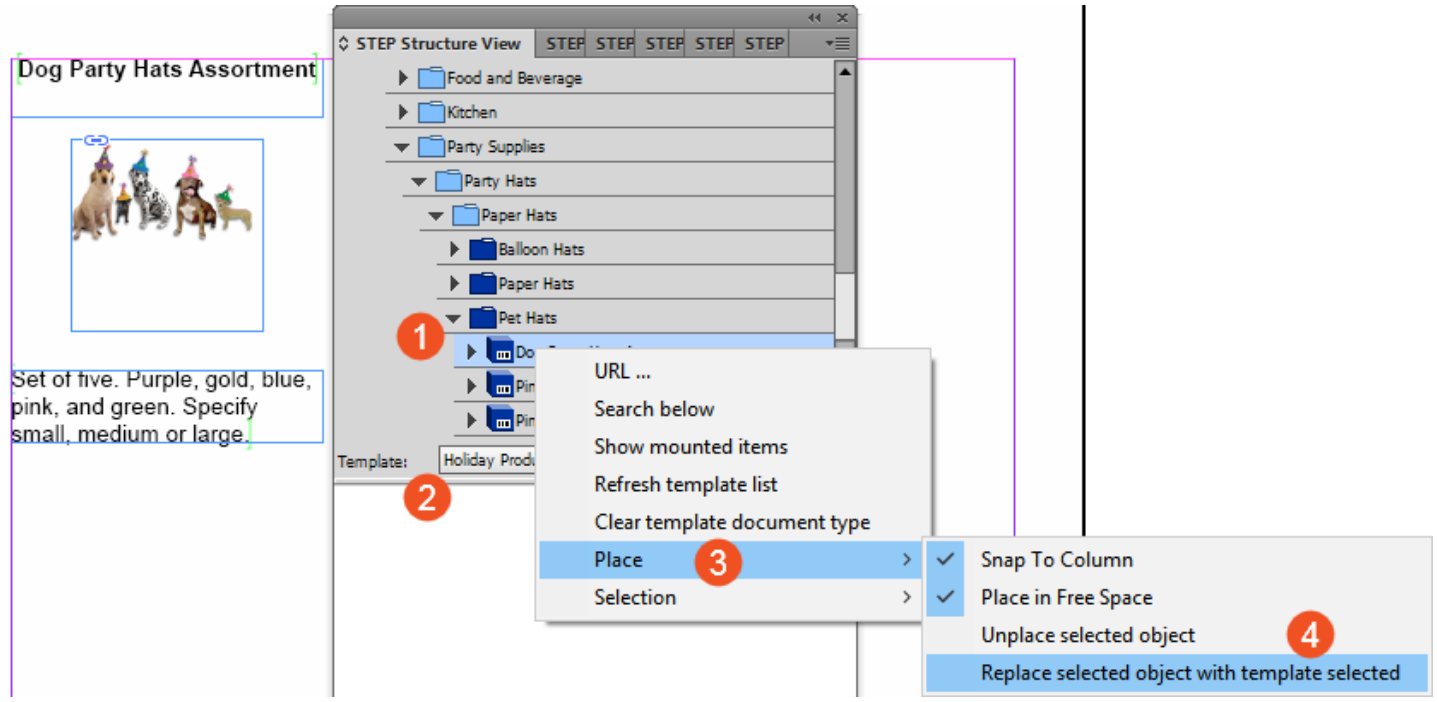


Remounting Objects

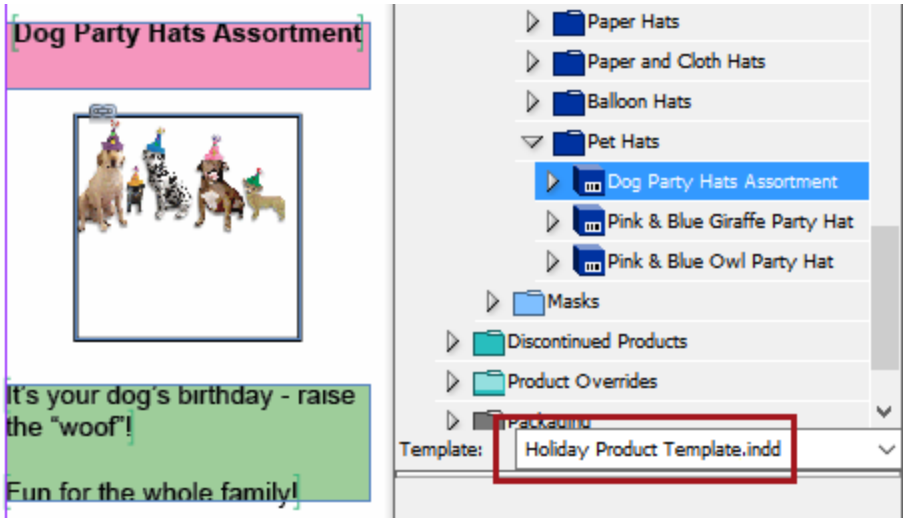
After mounting an object onto a page, you can remount it using a different product template by using the **Replace selected object with template selected** command. This command enables you to keep the mounted object on the page and change its layout without having to delete it from the page and remount it anew.

To use this command, follow these steps:

1. In the **STEP Structure View** panel, navigate to the object that you would like to remount.
2. Select the new template from the **Template** dropdown list.
3. Select **Place**, then **Replace selected object with template selected**.



4. The object is remounted using the selected template.



Unmounting Objects

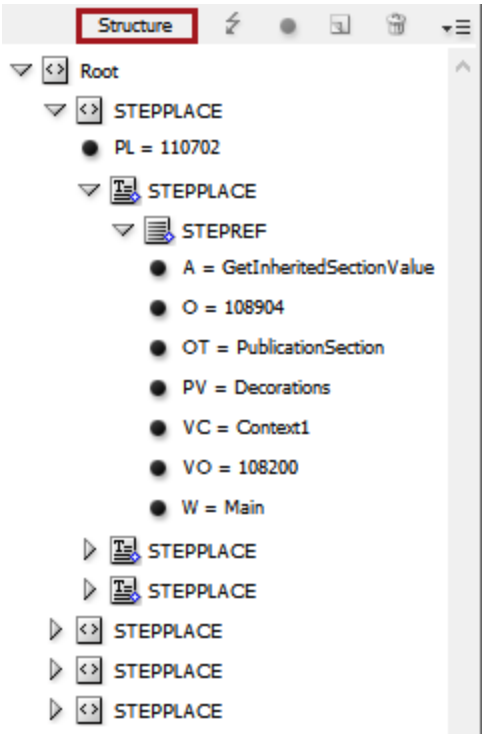
Sometimes, after mounting an object onto the page, it must be unmounted. Objects are frequently removed from pages when testing product templates, but they can be removed at any point in the production process.

Once an object is mounted onto a page from STEP, information about the mounted object is embedded into the **XML Structure** in InDesign. However, unmounting an object involves more steps than deleting it from the page.

When a mounted object is deleted, STEPXML tags still remain in the InDesign XML Structure, even though the visible data is gone from the page. Leftover STEPXML tags mean that historical data is still embedded on pages, and these leftover tags can cause issues such as:

- Attribute transformations not working correctly when a new object is mounted
- Problems with updating product data on the page, since the system will 'see' data on the page that is not actually there
- Miscalculations of space usage for objects on pages
- A mixture of publication versions on the same page, since version information is embedded in the XML tags
- Unwanted products appearing in indexes
- Inflated file size from the amount of broken and unused mount tags building up in the background

Note: To view the XML Structure in STEP Publisher, press Ctrl+Alt+1 in Windows or go to View > Structure > **Show Structure**.

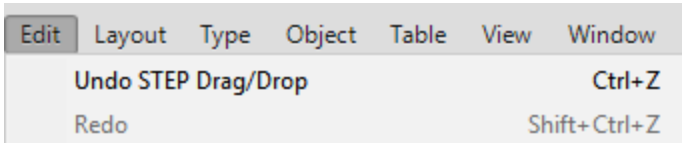


There are three ways to properly unmount an object and clear the InDesign XML structure.

Undo

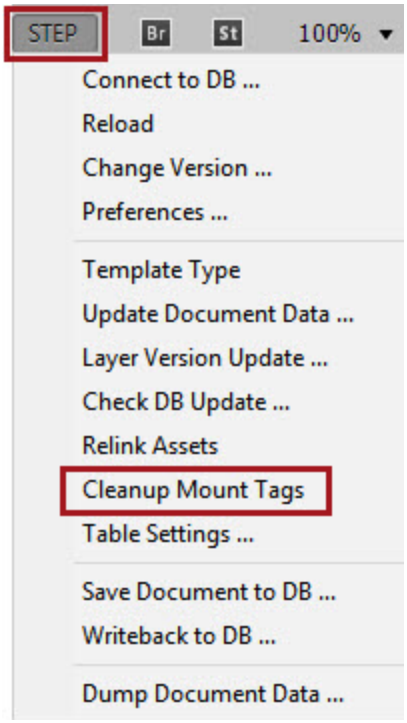
After mounting an object, if you decide that you are unhappy with the results and would like to mount it again, or, you are testing on a publication template and want to return to a clean slate after mounting, perform one of the following actions:

1. Press Ctrl+Z on Windows machines or Cmd+Z on Macs.
2. Go to Edit > **Undo STEP Drag/Drop**.



Delete Mounted Object and Cleanup Mount Tags

1. Delete the mounted object(s) from your page using standard delete functionality. If your object has mounted on multiple pages, you must delete the entire product presentation from all pages that it appears on, not just the portion that appears on the first page.
2. Go to STEP > **Cleanup Mount Tags**

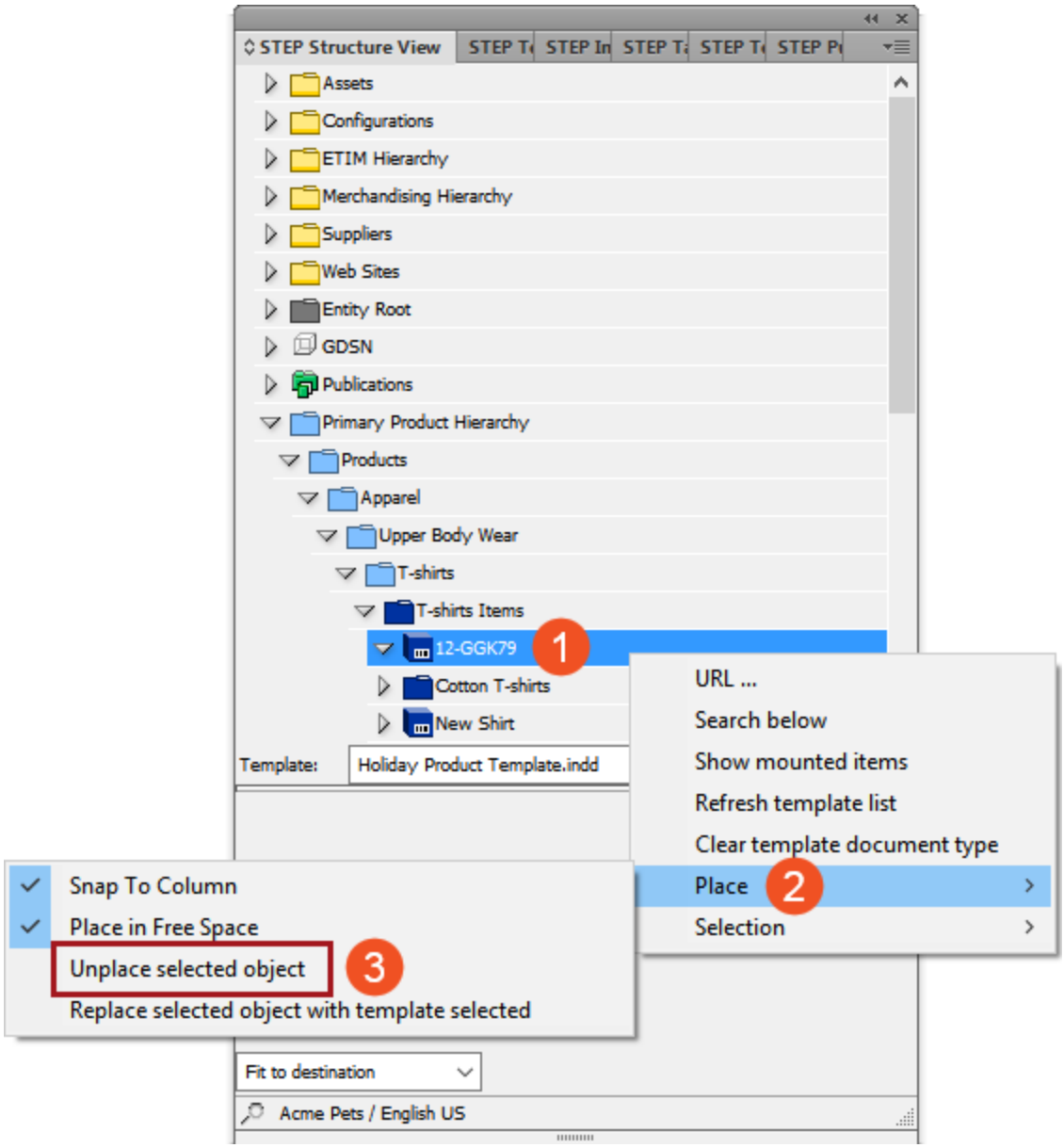


3. The XML Structure is now cleared.

Unplace selected object

Use the **Unplace selected object** option to delete an object from the page and remove the STEPXML tags from the structure in one action. This option only works on one object at a time.

1. Navigate to the mounted object in the STEP Structure View.
2. Right-click and select Place > **Unplace selected object**.



3. The mounted object is removed from the page and all associated STEPXML is removed from the InDesign XML Structure.

Mounting Objects Using Pagination Rules

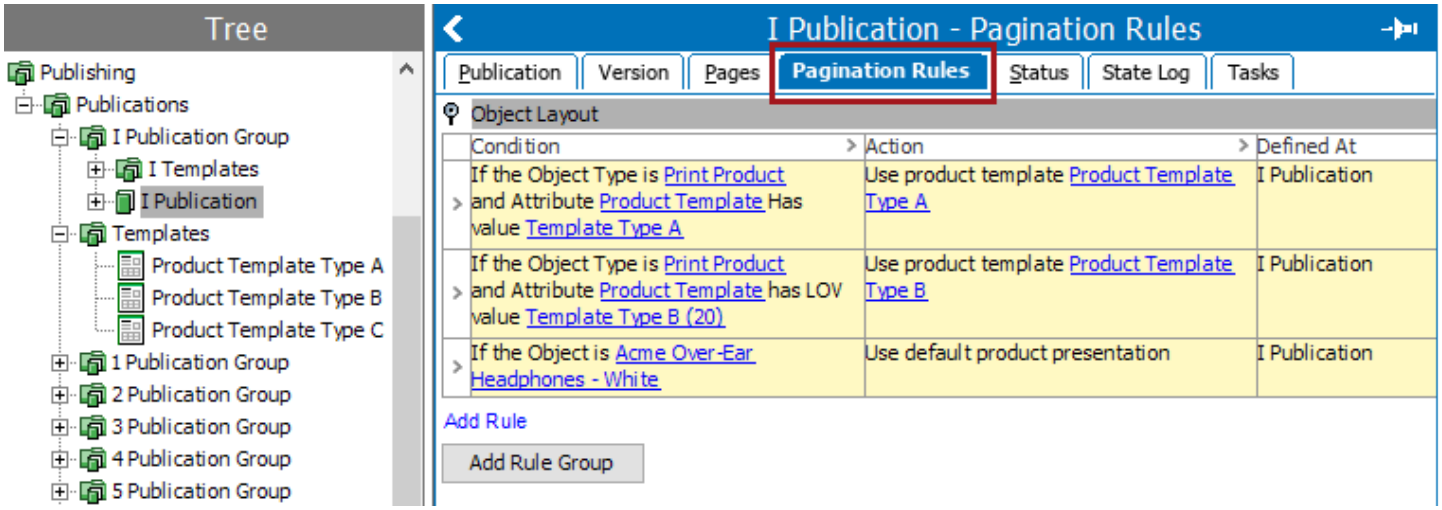
Pagination rules can be used in STEP Publisher to partially automate the mounting of products by pre-assigning a layout to objects before they are dragged and dropped onto InDesign pages. Typically, the applied layout will be a product template, but the layout can also be picked up from a previous publication.

Another benefit to using pagination rules is that this can circumvent the need to store product templates locally. Users in different physical locations can use the same set of templates without getting out of sync with other users, who may have different product templates stored locally. Pagination rules also allow for multiple objects to be mounted onto a page at once using different product templates.

Pagination Rules Tab

Pagination rules are created on the **Pagination Rules** tab. To view the Pagination Rules tab, select the relevant publication, section, or subsection object in the Tree, then click the **Pagination Rules** tab.

The Pagination Rules tab provides an overview of all conditions and actions applied to the publication and/or section. You can also see where in the publication structure the rules are defined ('Defined At').



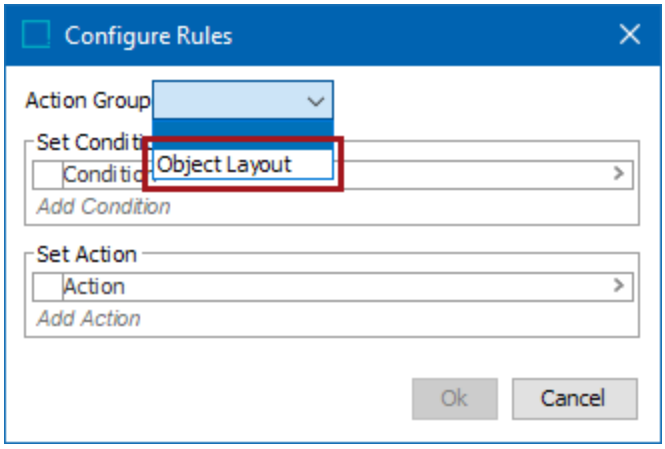
Adding Pagination Rules

For full details on how to add pagination rules, see the **Adding Pagination Rules** topic.

Pagination Rule Groups

Pagination rule groups are also known as **Action Groups**, since these groups contain selections of **actions** that should be taken on mounted objects. Each group also contains an assortment of **conditions** that are applied to determine exactly how these actions will be carried out.

The only Action Group available for basic STEP Publisher is **Object Layout**. For more information, see the **Object Layout Pagination Rule Group** topic.



Pagination Rule Inheritance

Pagination rules are inherited by child sections from parent publications, and by child subsections from parent sections.

For more information, see the **Pagination Rule Inheritance** topic.

Pagination Rule Evaluation

Pagination rules are evaluated one-by-one in the list from top to bottom. When the condition of a rule evaluates to `True`, the associated action is then evaluated.

For more information, see the **Pagination Rule Evaluation** topic.

Editing Pagination Rules

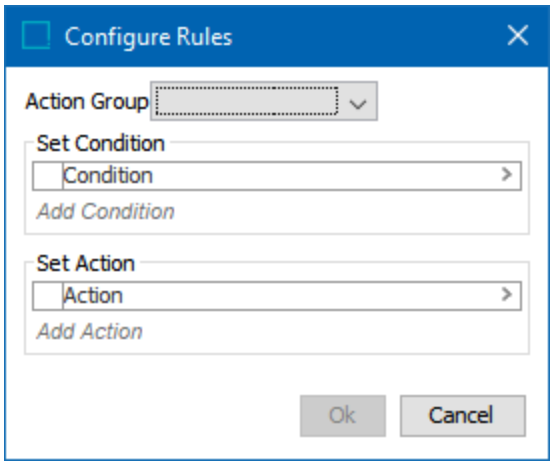
For full details on how to edit pagination rules, see the **Editing Pagination Rules** topic.

Adding Pagination Rules

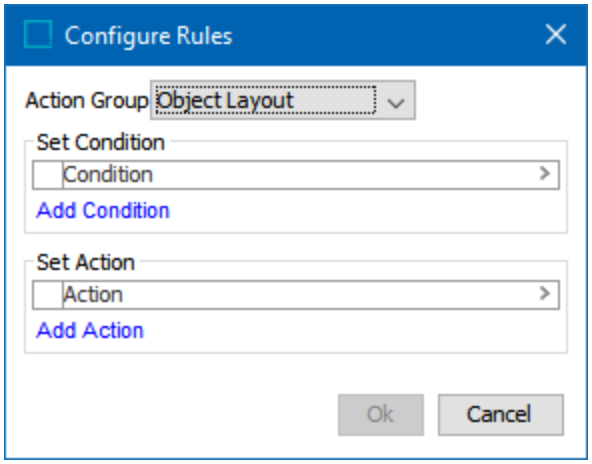
To add a pagination rule, use the following steps.

To Add a Pagination Rule

1. In the **Tree**, select the publication, section, or subsection where you want to add the pagination rule.
2. Go to the Pagination Rules tab and click **Add Rule Group**. The Rule Group determines which conditions and actions are available.
3. The **Configure Rules** dialog displays.

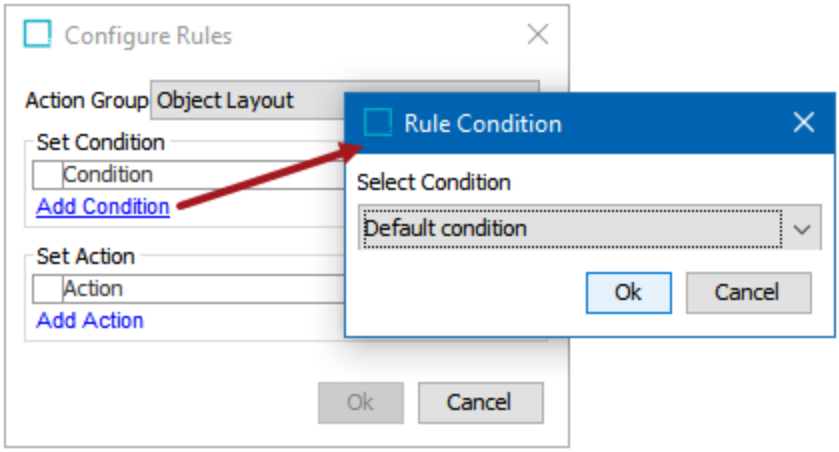


4. From the **Action Group** dropdown list, select the rule group that you want to apply (for example, 'Object Layout'). Once an action group is selected, the 'Add Condition' and 'Add Action' hyperlinks are activated.

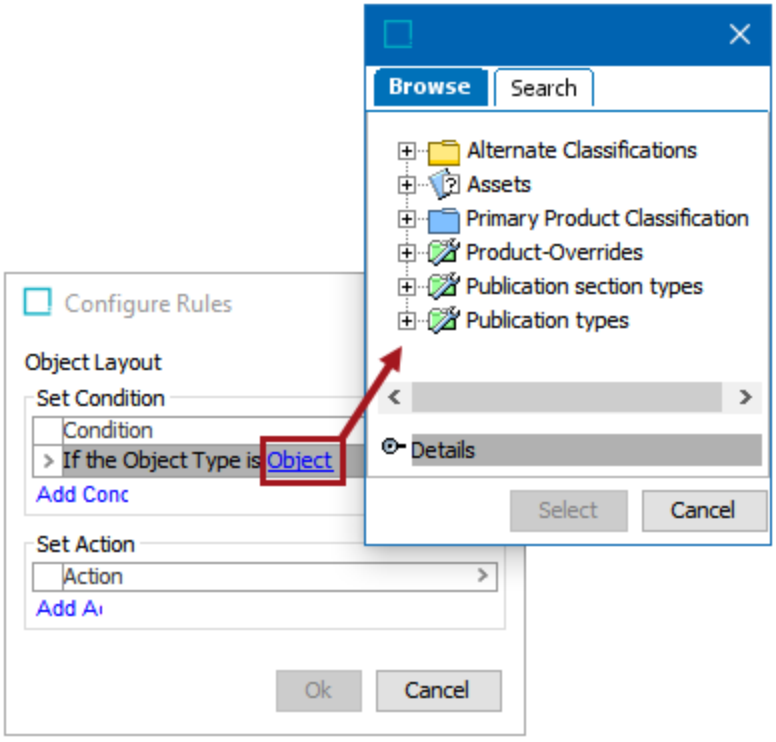


5. Under **Set Condition**, click Add Condition to display the 'Rule Condition' dialog. Choose the relevant condition(s) from the Select Condition dropdown list, then click OK.

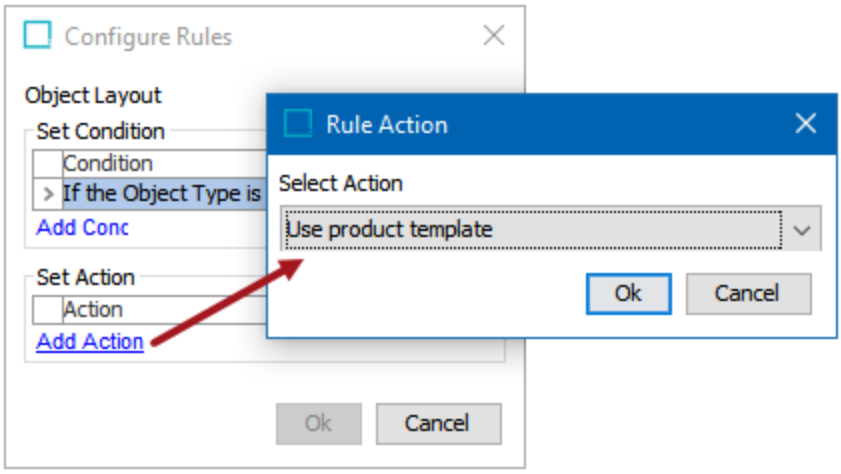
> **Note:** You can add as many conditions as needed but you can only add one action.



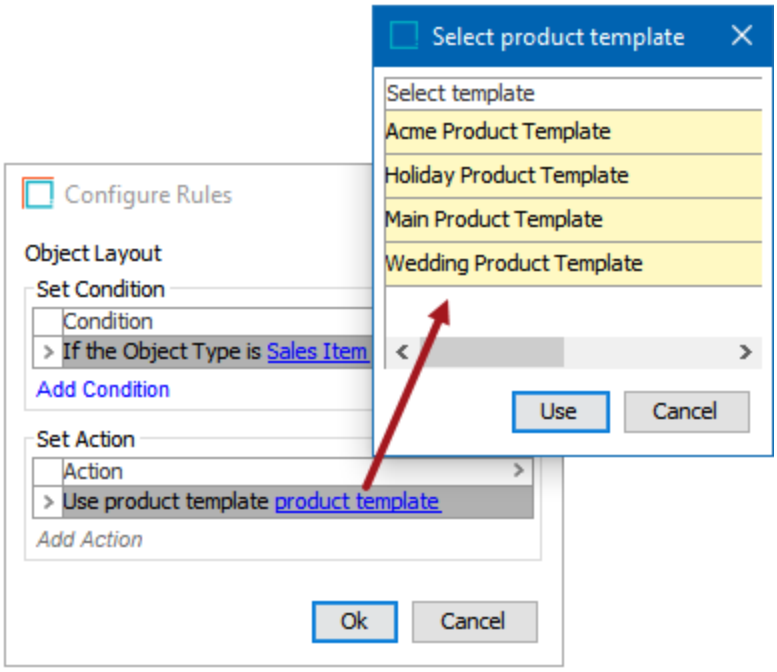
6. Some conditions can be limited further. Click the hyperlinked text within the condition (if applicable) to enter the additional criteria that determine when the condition should be applied.



7. Under **Set Action**, click 'Add Action' to display the 'Rule Action' dialog. Choose the relevant action from the Select Action dropdown list, then click OK.



8. Some actions can be limited further. Click the hyperlinked text within the action (if applicable) to enter the criteria that further define the action.



Important: To use a product template in a publication rule, it must first be linked to your publication. Otherwise, it will not display on the 'Select product template' list. For information on how to link product templates to publications, see the **Creating a Publication** topic in the **Publication Hierarchy** section of this guide.

9. Click **OK** to add the rule.

To Add Local Pagination Rules

It is possible to add local rules to a rule group at a lower level in the tree.

- if you add a rule to a group with inherited rules, a message is displayed asking if you want all rules in that group to become local. Click **Yes** to make all rules local.

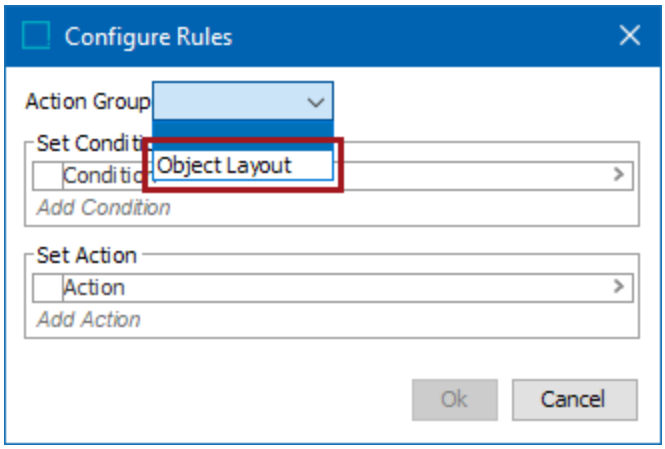
All rules in the rule group are then displayed in green in the list. As a result, the rules will no longer inherit changes made to the rules at a higher level.

To remove local rules, remove all the rules in a group one by one. The rule group reverts back to the inherited rules.

Object Layout Pagination Rule Group

Pagination rule groups are also known as **Action Groups**, since these groups contain selections of **actions** that should be taken on mounted objects. Each group also contains an assortment of **conditions** that are applied to determine exactly how these actions will be carried out.

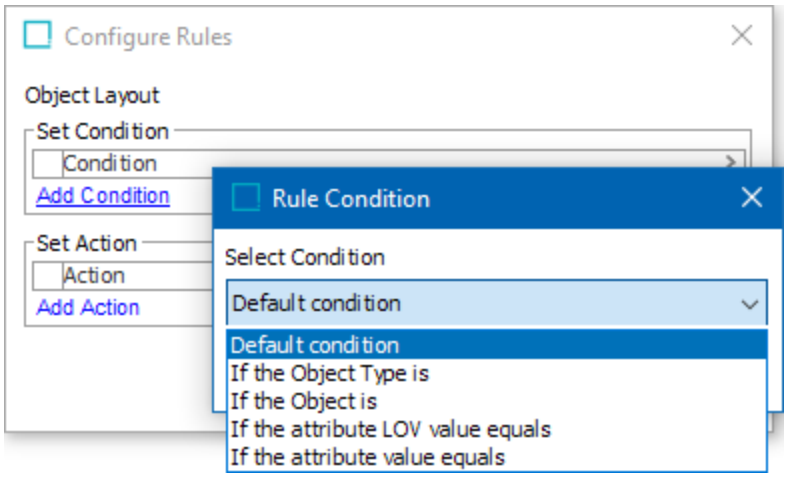
The only Action Group available for basic STEP Publisher is **Object Layout**.



Note: A much wider selection of pagination rules is available for the AutoPage and Flatplanner components. For more information on using pagination rules in AutoPage and Flatplanner, see the **AutoPage Pagination Rules** and **Flatplanner Pagination Rules** topics.

Object Layout Conditions

Conditions affect which actions are taken on objects as they are mounted onto pages. For STEP Publisher, these conditions will determine which layout is applied, as defined in the corresponding action.



The following table provides a list and description of the pagination rule conditions shown in the previous screenshot.

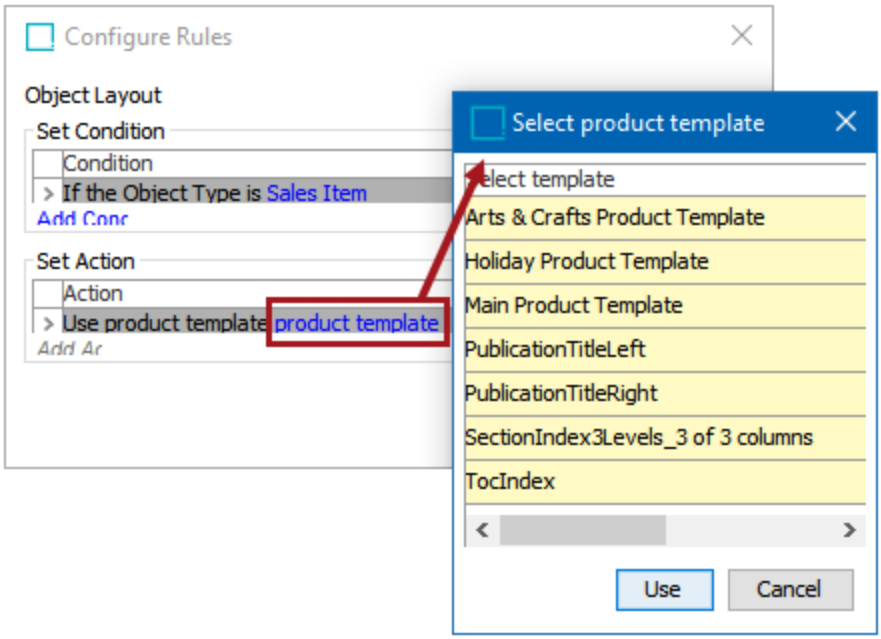
Condition	Description
Default condition	The rule is always applied. There are no specific conditions that must be met.
If the Object Type is	The rule is applied if the object is of the same object type as specified in the condition.
If the Object is	The rule is applied if the object is the same as the object specified in the condition.
If the attribute LOV value equals	The rule is applied if the LOV value ID or the LOV value of the attribute value is the same as the value specified in the condition. The rule matches first on ID and second on value, which allows for matching on values from LOVs that do not use value IDs. **Note** the following considerations for this condition: • It is only valid for LOV-based attributes • It does not apply to multi-valued attribute values. I.e., if the value specified in the condition is 'red' and a multi-valued attribute has two values, 'red' and 'blue,' the condition will not match. The value must be exactly as specified, and not a partial match.
If the attribute value equals	The rule is applied if the attribute value is the same as the value specified in the condition. **Note:** This condition does not apply to multi-valued attribute values. I.e., if the value specified in the condition is 'red' and a multi-valued attribute has two values, 'red' and 'blue,' the condition will not match. The value must be exactly as specified, and not a partial match.

Object Layout Actions

The object layout rules specify what product templates to apply to the objects being mounted.

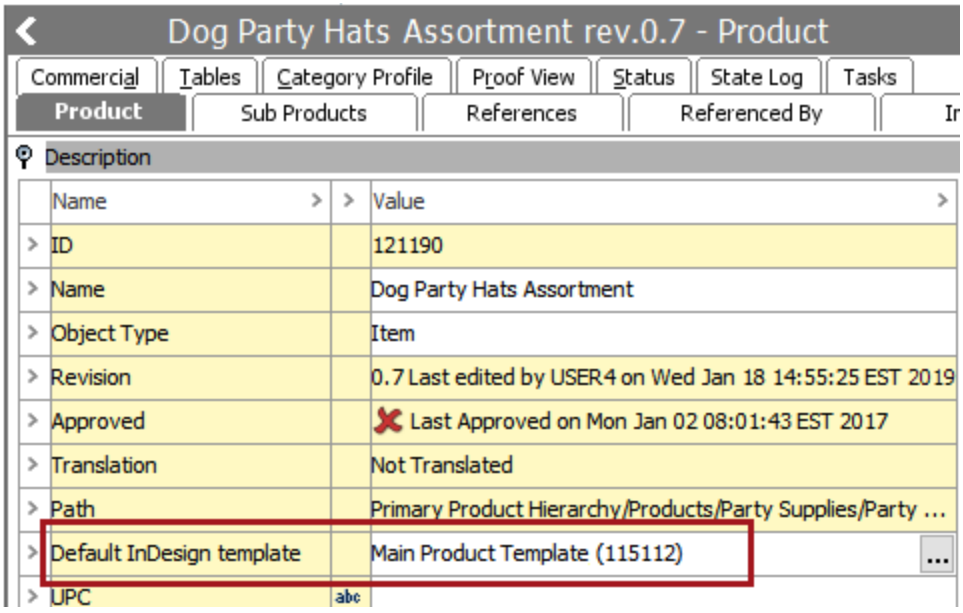
Use product template

Uses a product layout from a specified product template. The list of product templates that display when the 'product template' hyperlink is clicked under 'Set Action' are the product templates applied to the publication on the **Publication** tab.



Use default product presentation

Uses the default product template (Default InDesign template) that has been assigned to the object. For more information, see the **Default InDesign Product Templates** topic in the **STEP Publisher** documentation.

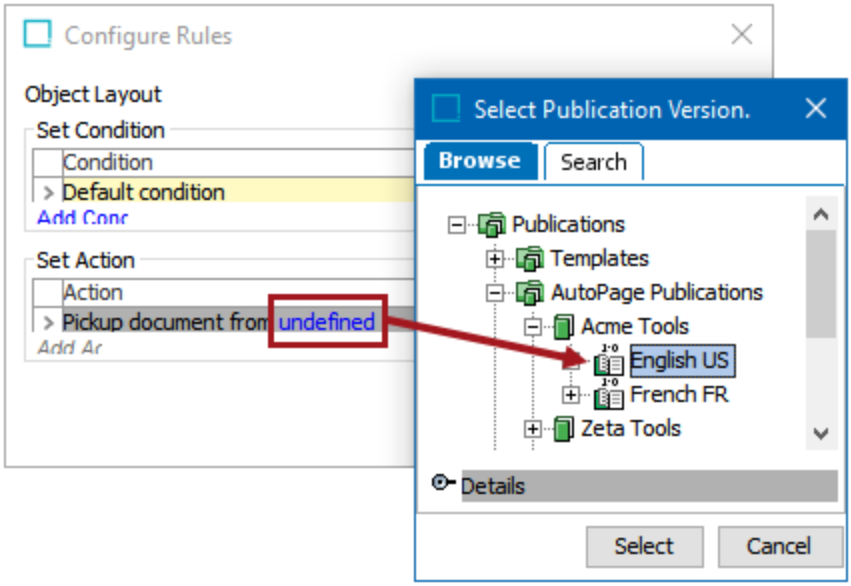


Pickup document

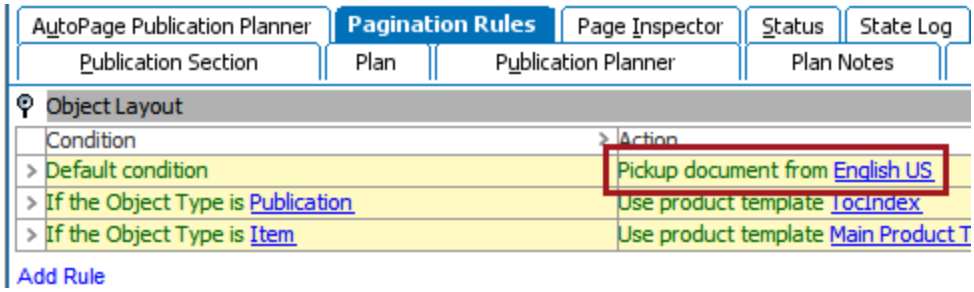
The pickup document option is used to reuse the layout(s) from a **version** of a specified preexisting publication when an object is mounted. When this rule is applied, the system will scan all actual pages within the chosen publication version, then use the layout that was applied to the object in that publication.

When adding the rule, the system prompts you to select the publication version from where it should take the layout, as shown in the below screenshot.

Note: A publication *version* must be chosen since an object's final layout on the InDesign page can vary between different versions within the same publication.



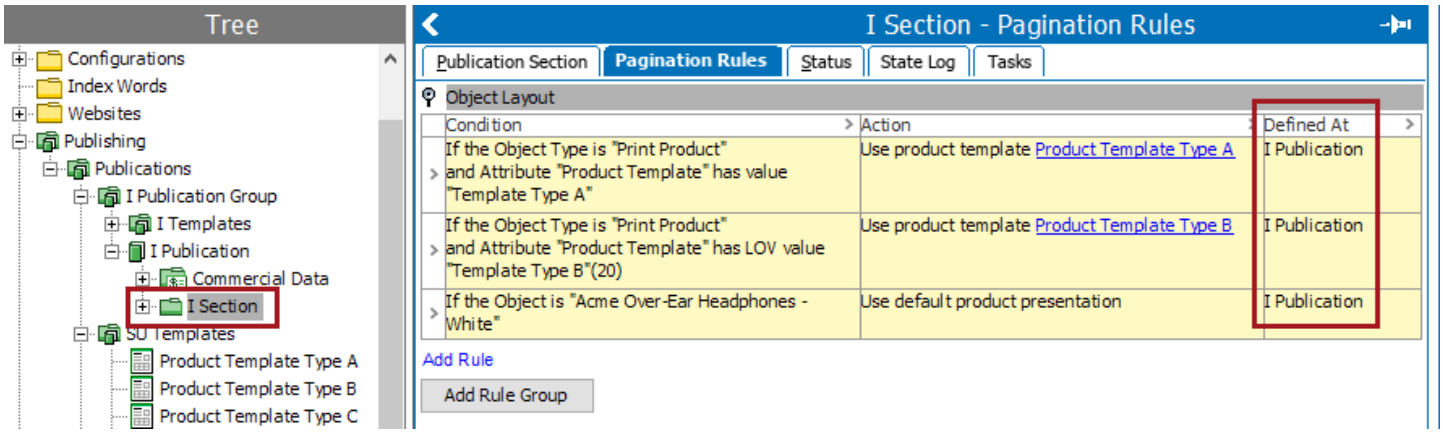
After the version is chosen, the rule will resemble the following:



Pagination Rule Inheritance

Pagination rules can be applied to entire publications as well as individual sections and subsections. Rules are inherited by child sections from parent publications and by subsections from parent sections. Inherited rules can also be overridden, or, rules can be created on sections only and not set at the publication level at all.

The **Defined At** column displays where the rules are inherited from. In the below example, the 'I Section' is selected in the Tree, and the Defined At column on the Pagination Rules tab shows that the rules are defined at the 'I Publication' level.



Rules that are applied at lower levels take precedence over rules applied at higher levels. So, if you have applied a rule at publication level, it is inherited to sections and subsections, but rules applied at section or subsection levels take precedence over the inherited rule.

It is possible to edit the action parameter of an inherited rule. A complete rule group can also be overridden manually in cases where you want to change the rule conditions or rules in general.

For information on how to edit and/or override inherited rules, see the **Editing Pagination Rules** topic.

Pagination Rule Evaluation

Pagination rules are evaluated one-by-one in the list from top to bottom. When the condition of a rule evaluates to `True`, the associated action is then evaluated. The layout of a page is decided by the sum of all conditions with actions that evaluate to true. The order of evaluation means that one action can override an action associated with a rule further down in the list. Therefore, you should always specify the rule with the more general rule first and the most specific rule last.

The order of the pagination rules can be changed by using drag and drop.

Examples

The following two examples use **object layout** rules to illustrate pagination rule evaluation.

Example 1

- Condition = always, Action = Use product template = template1
- Condition = objectType is OT1, Action = Use product template = template2

When an object is paginated with object Type OT2, then the first condition *Always* evaluates to **True** and the rule assigns the product template *template1* to the product. The condition of the second rule (*objectType is OT1*) evaluates to **False**, and the action of the second rule is therefore not used.

However, if you paginate an object with object Type OT1, the first condition is still **True** and the rule assigns the product template *template1* to the object. The second condition also evaluates to **True** and the action for the rule then assigns the product template *template2* to the object and then overwrites the assignment done by the first rule.

Example 2

- Rule 1: Always use the product template 'Acme Products'
- Rule 2: If the value of the 'Folder' attribute equals 'Folder Template,' then use the product template 'Folder Template.'
- Rule 3: If the product is of the object type 'Nice Family,' use the product template 'Nice Product Template.'

The rules are applied as follows:

- A product that is not of the object type 'Nice Family' and does not have the attribute 'Folder' with the value of 'Folder Template' will be paginated using the 'Acme Products' product template according to rule 1.
- A product that is not of the object type 'Nice Family' but the value of the attribute 'Folder' is 'Folder Template' will be paginated using the product template 'Folder Template' according to rule 2.
- A product of the object type 'Nice Family' will be paginated using the product template 'Nice Product Template' according to rule 3.

To Change the Evaluation Order of Pagination Rules

Click the rule you want to move, then drag and drop it to its new position in the list.

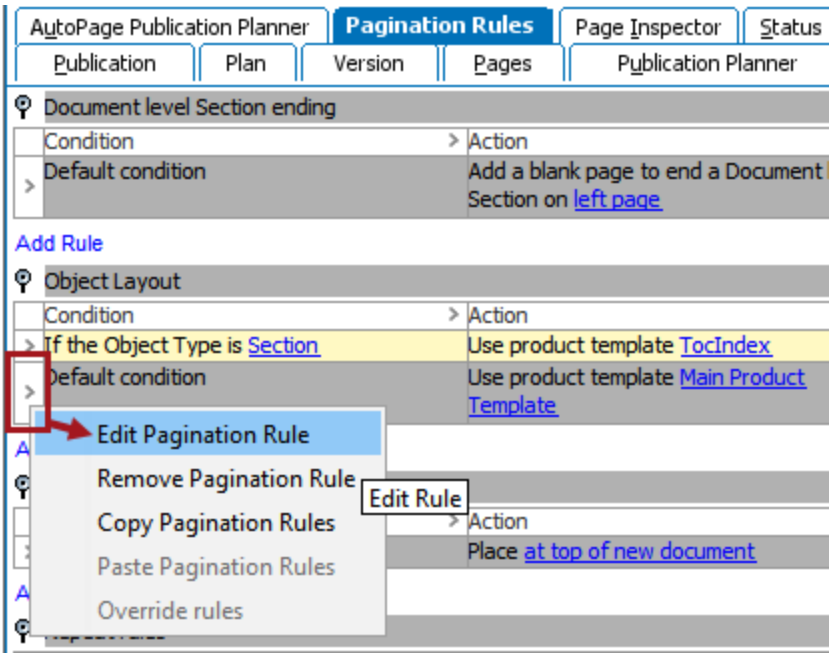
Editing Pagination Rules

Both local and inherited pagination rules can be edited. On local rules, you can change both conditions and actions. On inherited rules, you can only change the actions.

Note: Some of the examples shown in this topic may apply to AutoPage or Flatplanner only, as basic 'drag and drop' STEP Publisher only supports Object Layout rules. For full details on AutoPage and Flatplanner pagination rules, see the **AutoPage Pagination Rules** and **Flatplanner Pagination Rules** topics in this guide.

Edit Pagination Rules

1. In the Tree, locate the publication, section, or subsection that contains the rule(s) you want to edit.
2. On the **Pagination Rules** tab, right-click on the small arrow icon next to the rule you want to edit, then choose **Edit Pagination Rule**.

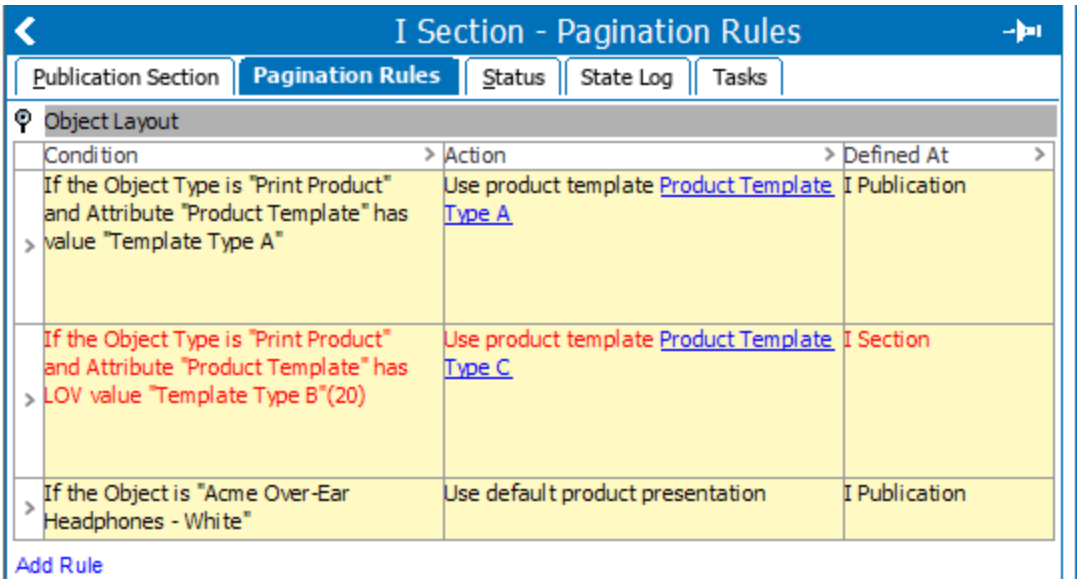


3. In the **Configure Rules** dialog, make the desired changes, then click **OK**.

Editing Inherited Actions

It is possible to edit the **action** parameter of an inherited rule. If you have edited the action of an inherited rule, the rule is then displayed in red on the level where the action has been edited. If there is only one rule in the inherited group, then the rule is displayed in green, since the entire group has been overridden.

Note: You cannot *add* or *remove* actions from inherited rules.



Editing Inherited Conditions

You cannot edit, add, or delete *conditions* on inherited rules. To 'edit' inherited rule conditions, the entire rule group must be overridden. See the next subsection of this topic, 'Override Inherited Rules,' for more information.

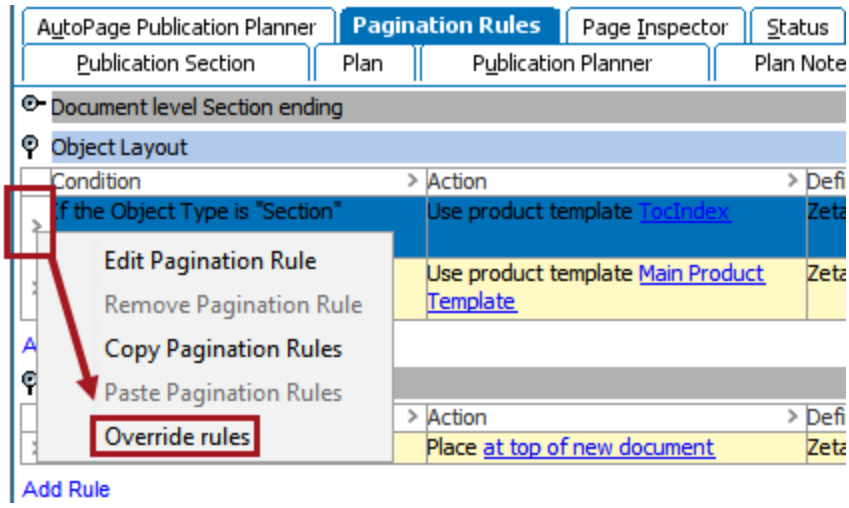
Override Inherited Rules

Since conditions cannot be edited, added, or deleted from an inherited pagination rule, the only way to alter the condition in an inherited pagination rule is to **override** the rule group. Overriding allows you to make changes to both the conditions and actions within the rule group. When a rule group is overridden, all rules are highlighted in green.

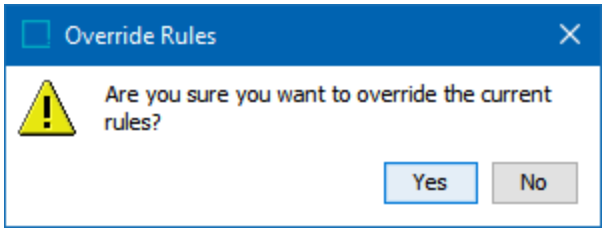
Overriding the rules in a rule group makes them local. When local inherited rules are overridden, changes made at higher levels are not inherited to the level where the rules have been overridden.

To override a rule group:

1. In the Tree, locate the publication, section, or subsection that contains the rule(s) you want to override.
2. On the Pagination Rules tab, left-click or right-click on the small arrow icon next to any rule in the group, then choose **Override Rules.**

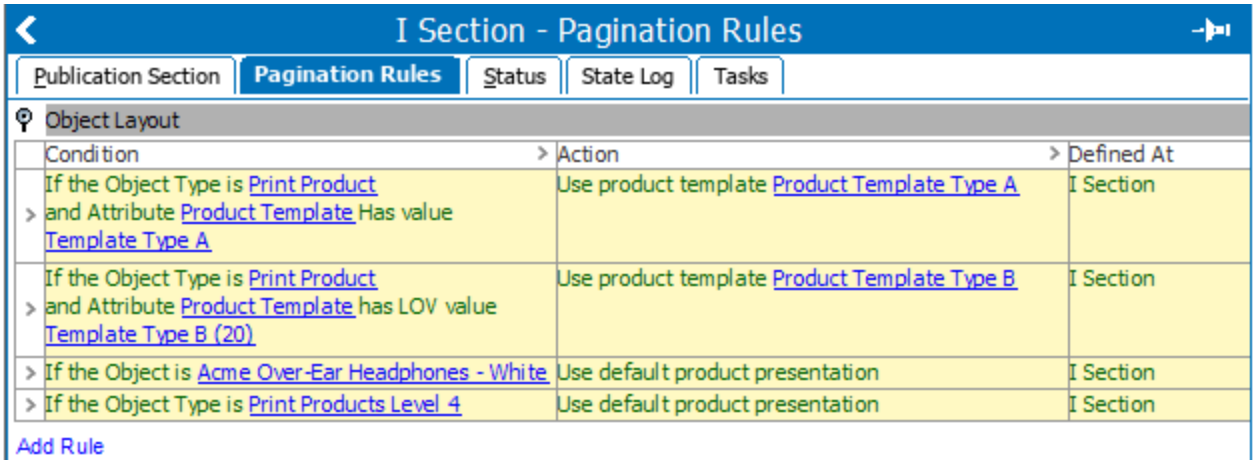


3. Click **Yes** on the Override Rules dialog.



4. The rules are overridden and displayed in green in the list. You can now edit the actions and conditions on the rules, as well as edit and remove rules from the rule group. To restore all original rules that were previously inherited from a higher level, all overridden rules must be deleted.

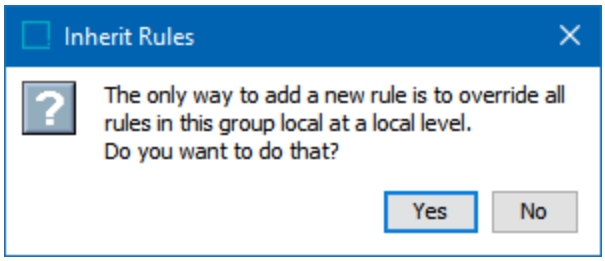
> **Note:** Rules can only be removed one-by-one; it is not possible to multi-select and remove all rules at once.



Add An Extra Rule to a Rule Group with Inherited Rules

When you add an extra rule to a rule group with inherited rules, you are prompted to accept that all rules in the affected rule group will become local.

1. In the Tree, locate the publication, section, or subsection that contains the rule group where the new rule should be added.
2. On the **Pagination Rules** tab, click 'Add rule' within the relevant rule group, then click 'Yes' on the **Inherit Rules** dialog.



3. Add the new rule(s) by following the instructions outlined in the **Adding Pagination Rules** topic.
4. The rules are made local and are displayed in green in the list.

Important: All rules within a pagination rule group are affected when you create a local rule. If you make changes to a rule at the topmost publication level after you have created the local rule, the changes are not inherited. However, if only the *actions* are changed on the inherited rules, then only the edited rule turns red and this will not break the inheritance of the entire group rule.

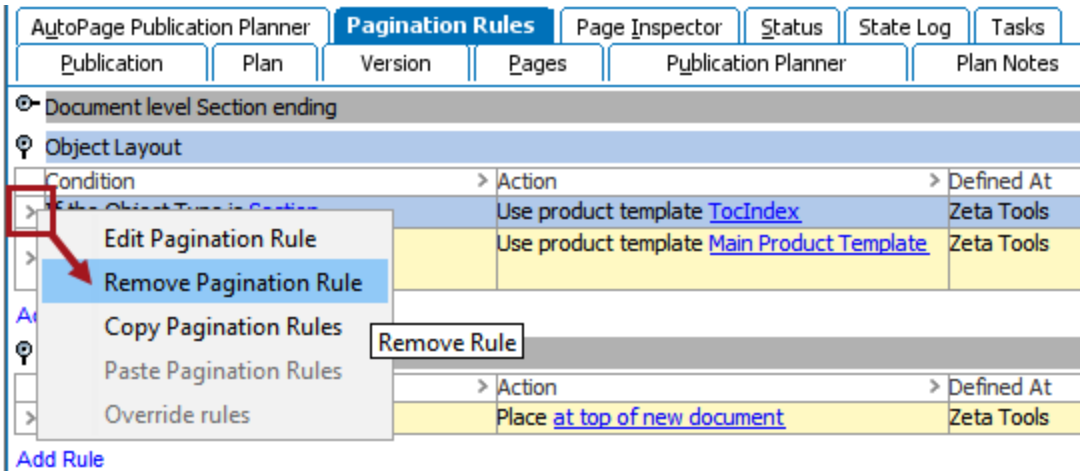
If you want to get rid of the local values, you can remove all the rules one-by-one. After all the local rules within a pagination rule group have been deleted, all rules will be inherited again. The following subsection explains how to remove pagination rules.

Remove a Pagination Rule

1. In the Tree, click the publication, section, or subsection that contains the rule(s) that you would like to delete.

   Note: Inherited rules cannot be removed; only overridden. Only local, edited, or overridden rules can be removed.

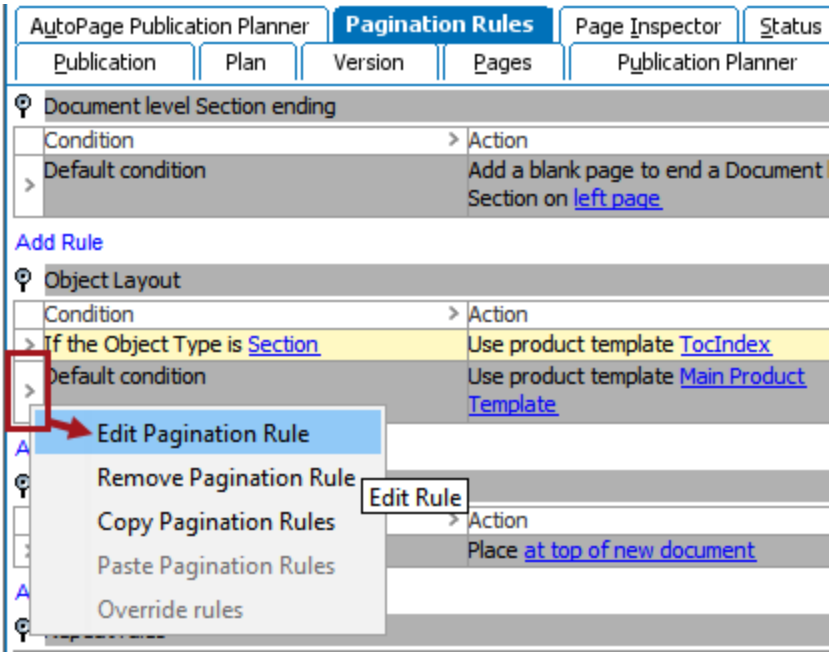
2. On the **Pagination Rules** tab, right-click on the small arrow icon next to the rule you want to remove, then choose **Remove Pagination Rule.**



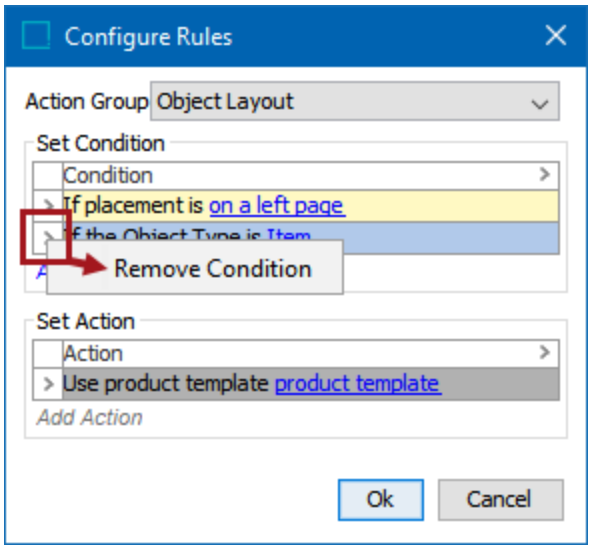
3. The rule is removed.

Delete a Condition or Action

1. To delete a condition or action from a pagination rule on the Pagination Rules tab, right-click on the small arrow in the row that contains the rule that the condition or action is applied to, then choose **Edit Pagination Rule**.



2. In the **Configure Rules** dialog, either left-click or right-click on the small arrow in the row that contains the condition or action to be removed, then click **Remove Condition** (or **Remove Action**, for actions).



Drag and Drop Rules

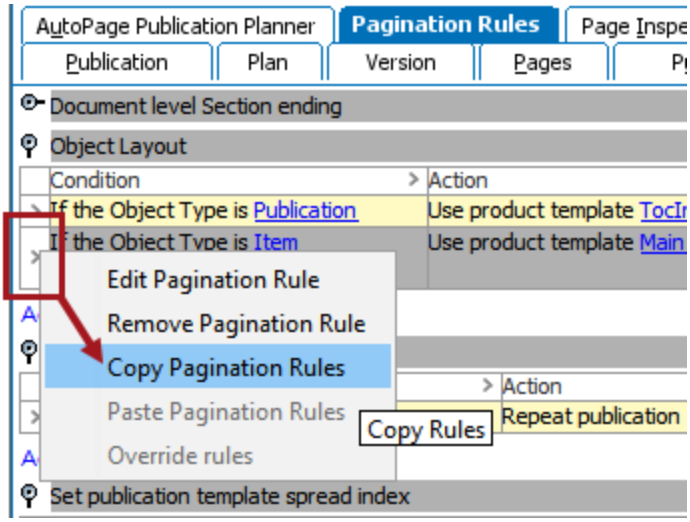
You can change the order of the rules within a group by using drag and drop. On the Pagination Rules tab, click on the rule that you want to move, then hold down your left mouse button and drag the rule to its new position.

Note: Rules can only be repositioned within a group; they cannot be moved from group to group.

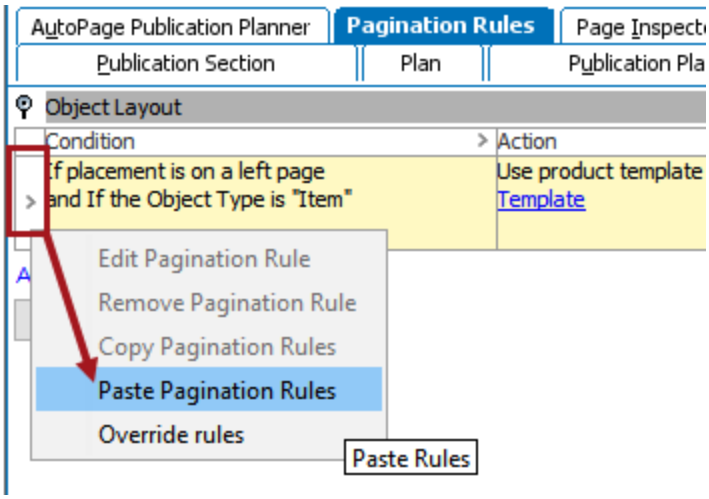
Copy and Paste Pagination Rules

You can copy rules to and from publications, sections, and subsections. The paste destination does not have to be of the same type as the source.

1. In the Tree, locate the publication, section, or subsection that contains the rule you want to copy.
2. On the Pagination Rules tab, click the arrow icon next to the rule you want to copy, right-click, and then select **Copy Pagination Rules**.



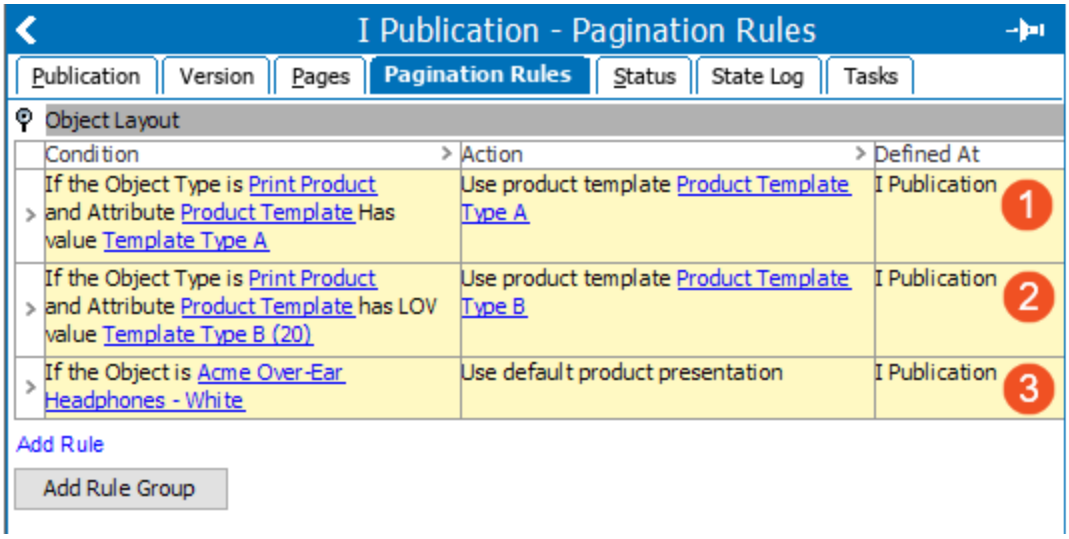
3. In the Tree, click the destination publication, section, or subsection and go to the **Pagination Rules** tab.
4. Click the **arrow** icon of an existing rule, right-click, and then select **Paste Pagination Rules**.



Note: If you paste a local rule into a group with inherited rules, all rules in the group are overridden and become local, causing them to display in green.

Mounting With Pagination Rules Example

In the following example, three **object layout** pagination rules have been configured on a publication. All three rules call for the assignment of a product template to mounted objects that meet specified criteria. The first two rules use attribute values to assign the product templates. The third rule assigns the default product template assigned to the mounted object.



Example Rules

Rule 1

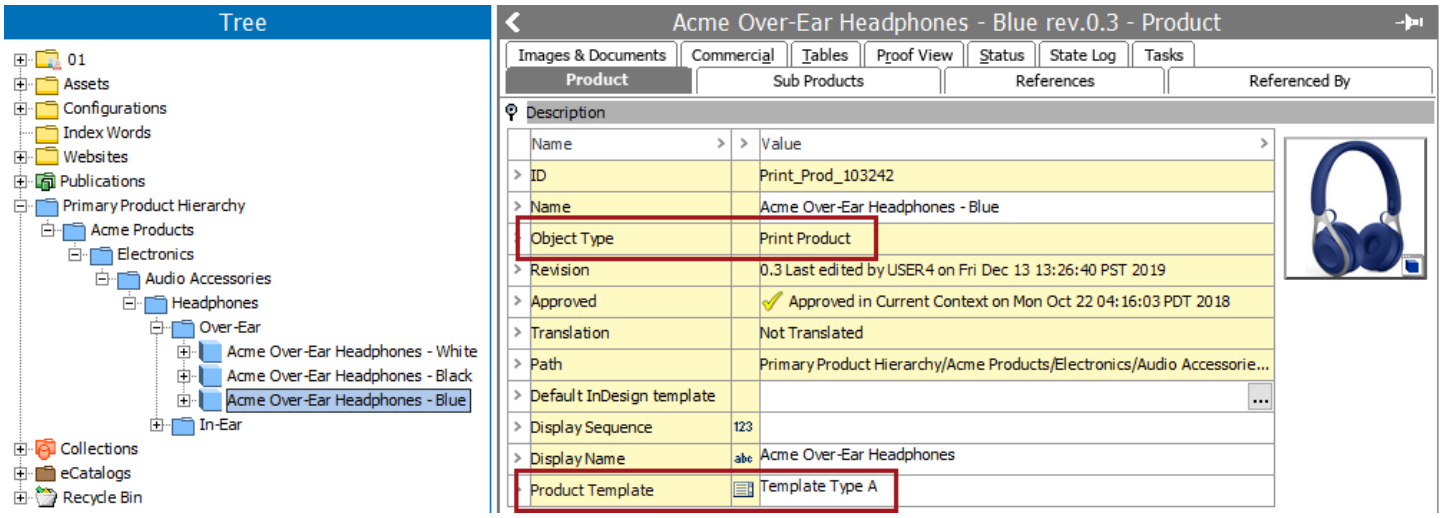
Condition: If the Object Type is 'Print Product' and Attribute Product Template has value Template Type A

Action: Use product template 'Product Template Type A'

Condition	Action	Defined At
If the Object Type is Print Product and Attribute Product Template Has value Template Type A	Use product template Product Template Type A	I Publication

This pagination rule applies to the product pictured in the below screenshot, Acme Over-Ear Headphones Blue, because the product meets the rule's conditions:

- The object type is Print Product
- The value of the 'Product Template' attribute is 'Template Type A'



Rule 2

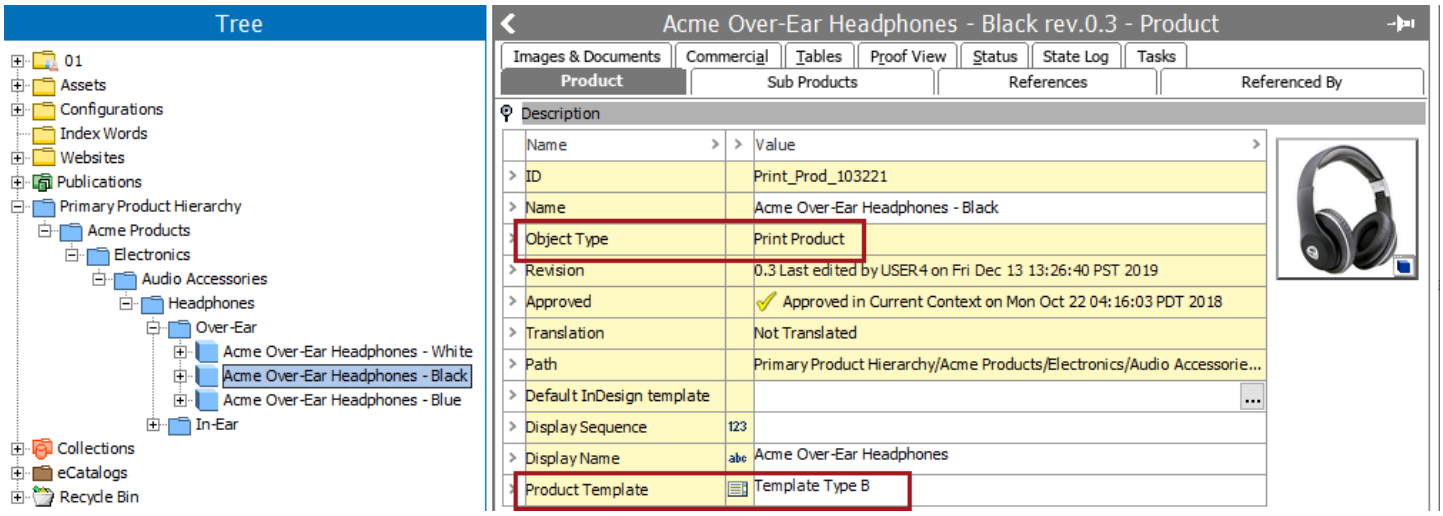
Condition: If the Object Type is 'Print Product' and Attribute 'Product Template' has LOV value 'Template Type B (20)'

Action: Use product template 'Product Template Type B'

If the Object Type is Print Product and Attribute Product Template has LOV value Template Type B (20)	Use product template Product Template Type B	I Publication

This pagination rule applies to the product pictured in the below screenshot, Acme Over-Ear Headphones Black, because the product meets the rule's conditions:

- The object type is Print Product
- The value of the 'Product Template' attribute is 'Template Type B'



Rule 3

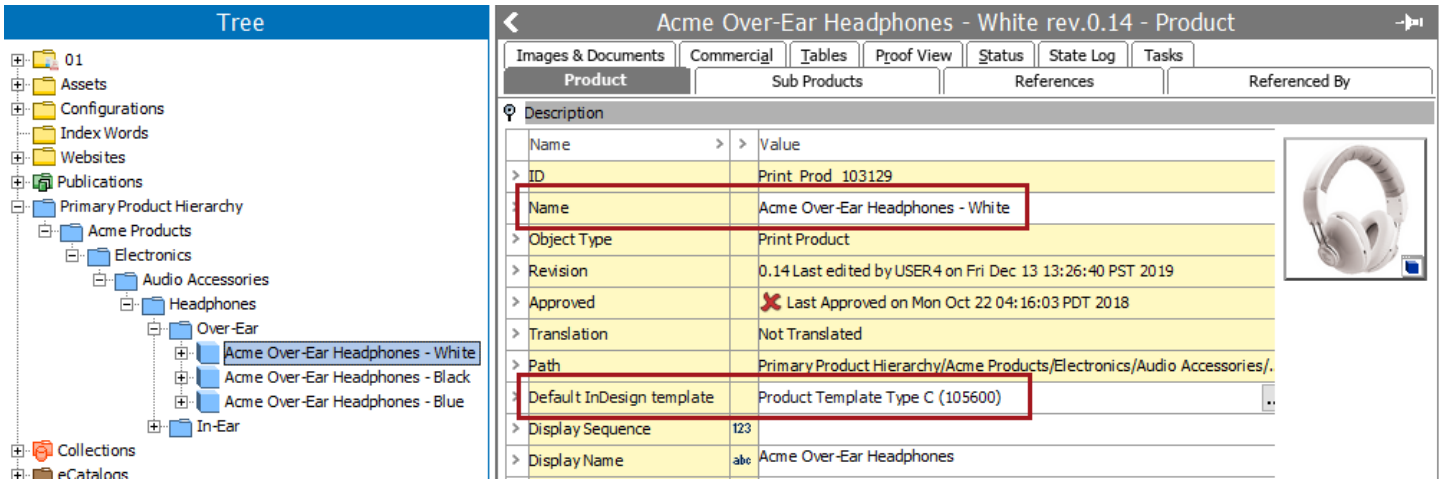
Condition: If the Object is 'Acme Over-Ear Headphones - White'

Action: Use default product presentation

>	If the Object is Acme Over-Ear Headphones - White	Use default product presentation	I Publication

This pagination rule applies to the product pictured in the below screenshot, Acme Over-Ear Headphones White, because the product meets the rule's conditions:

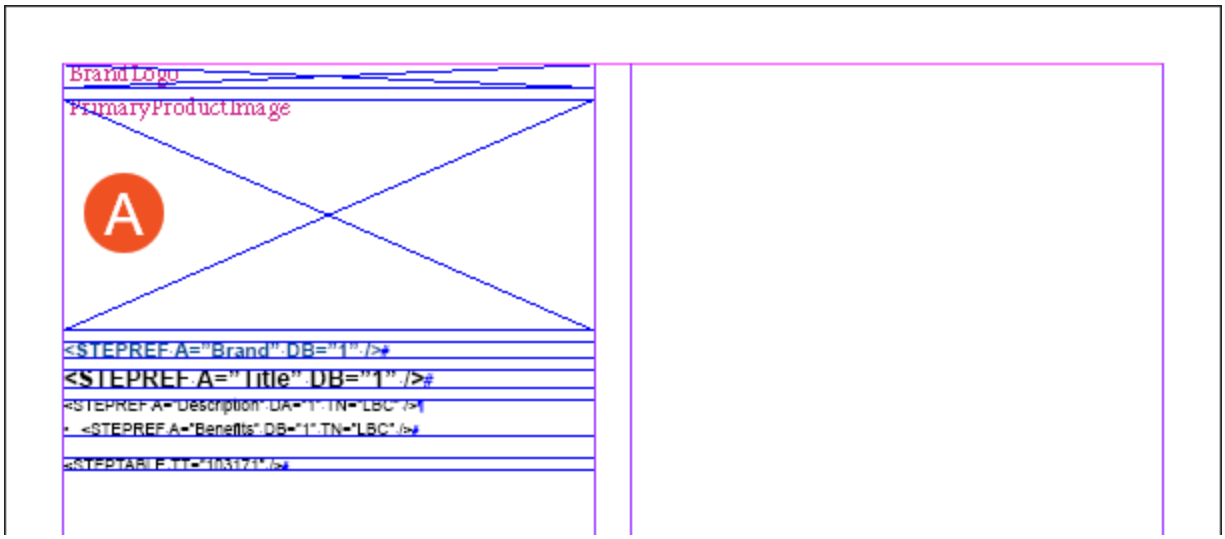
- The object is 'Acme Over-Ear Headphones - White'
- The object has a Default InDesign template assigned



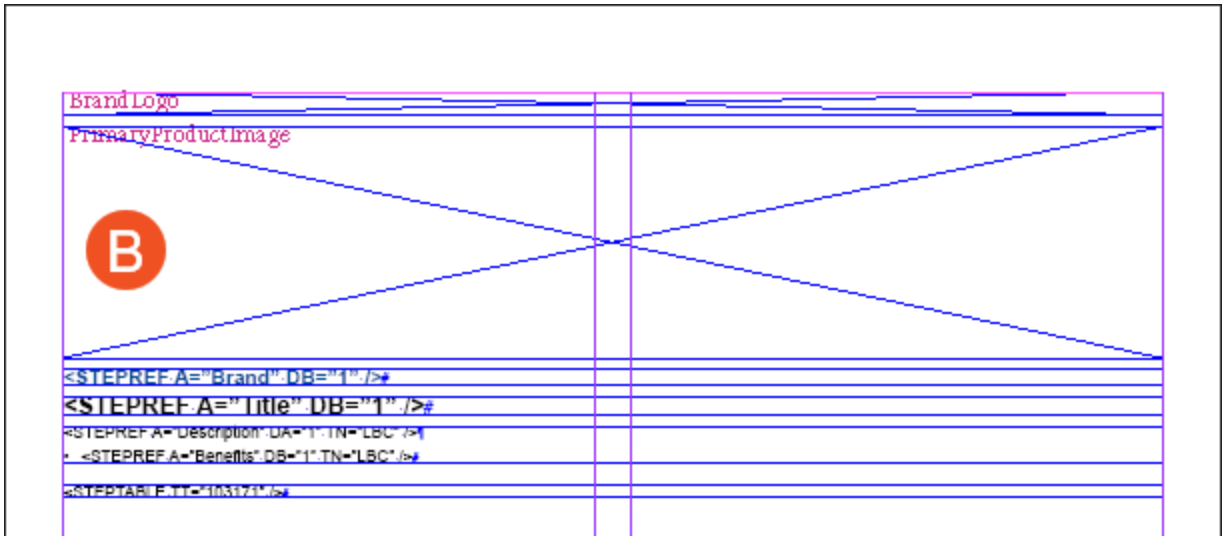
Example Templates from Pagination Rules

To illustrate which layouts will be applied to the mounted products using the pagination rules in this example, the product templates are pictured below.

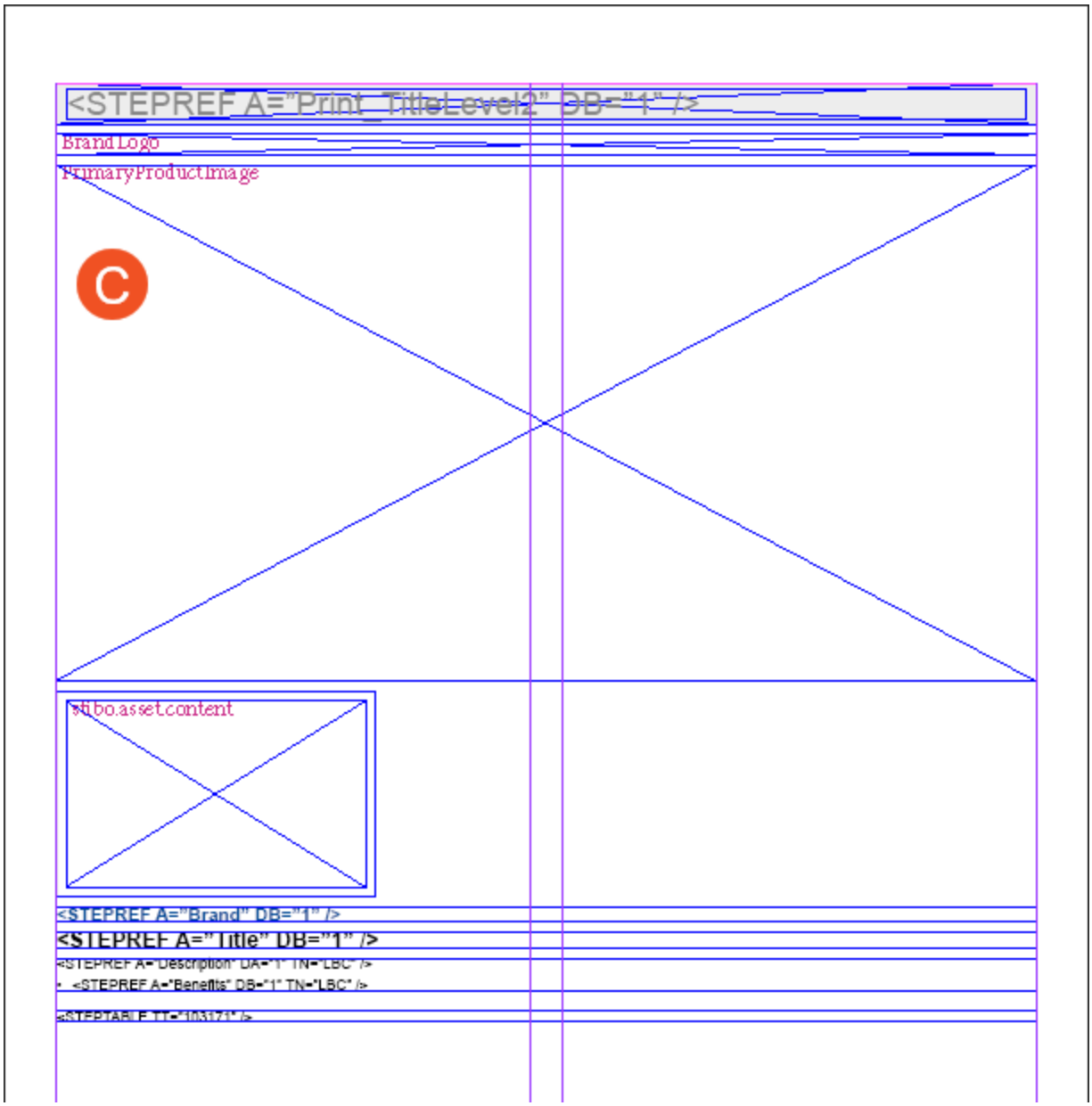
Product Template Type A



Product Template Type B



Product Template Type C

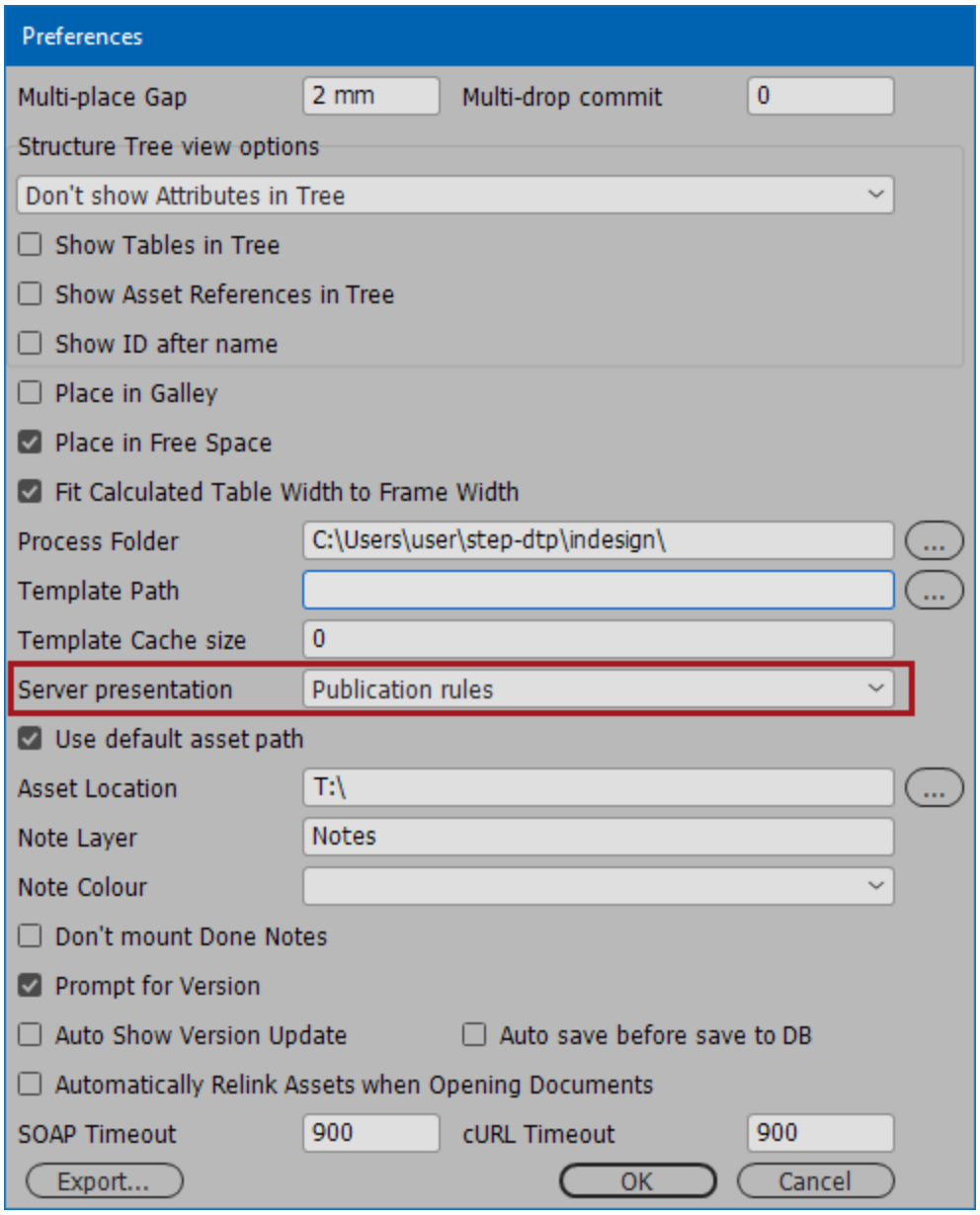


Mounting Multiple Products Using Pagination Rules

Once the pagination rules are set up, the process to mount the products is nearly identical to that for mounting products using locally stored templates.

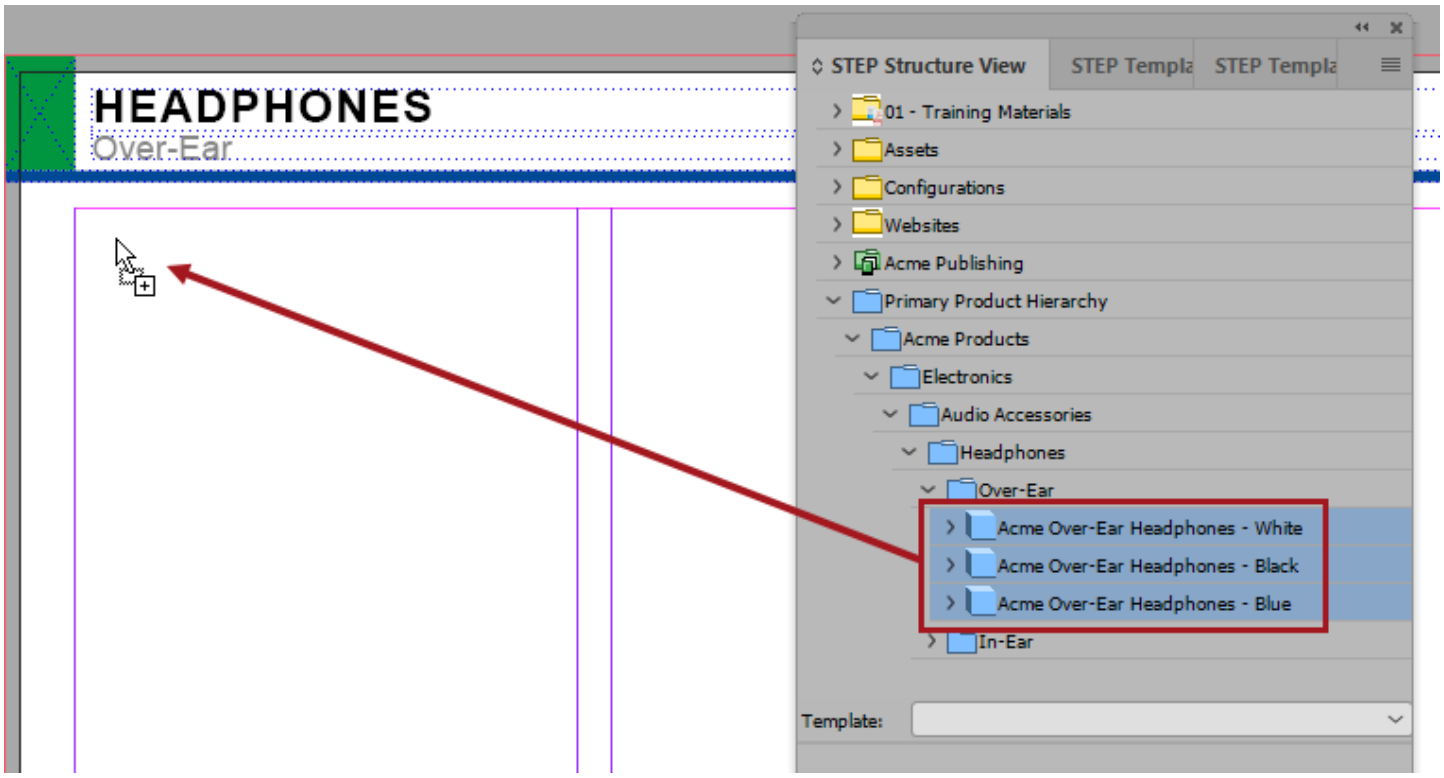
For general information on how to mount products, see the **Mounting Objects to Pages** topic.

1. Set 'Server presentation' to **Publication rules** in the Preferences menu. You do not need to have a Template Path specified, since no local templates will be used. For more information on the Preferences menu, see the **Configuring the STEP Preferences Menu** topic.

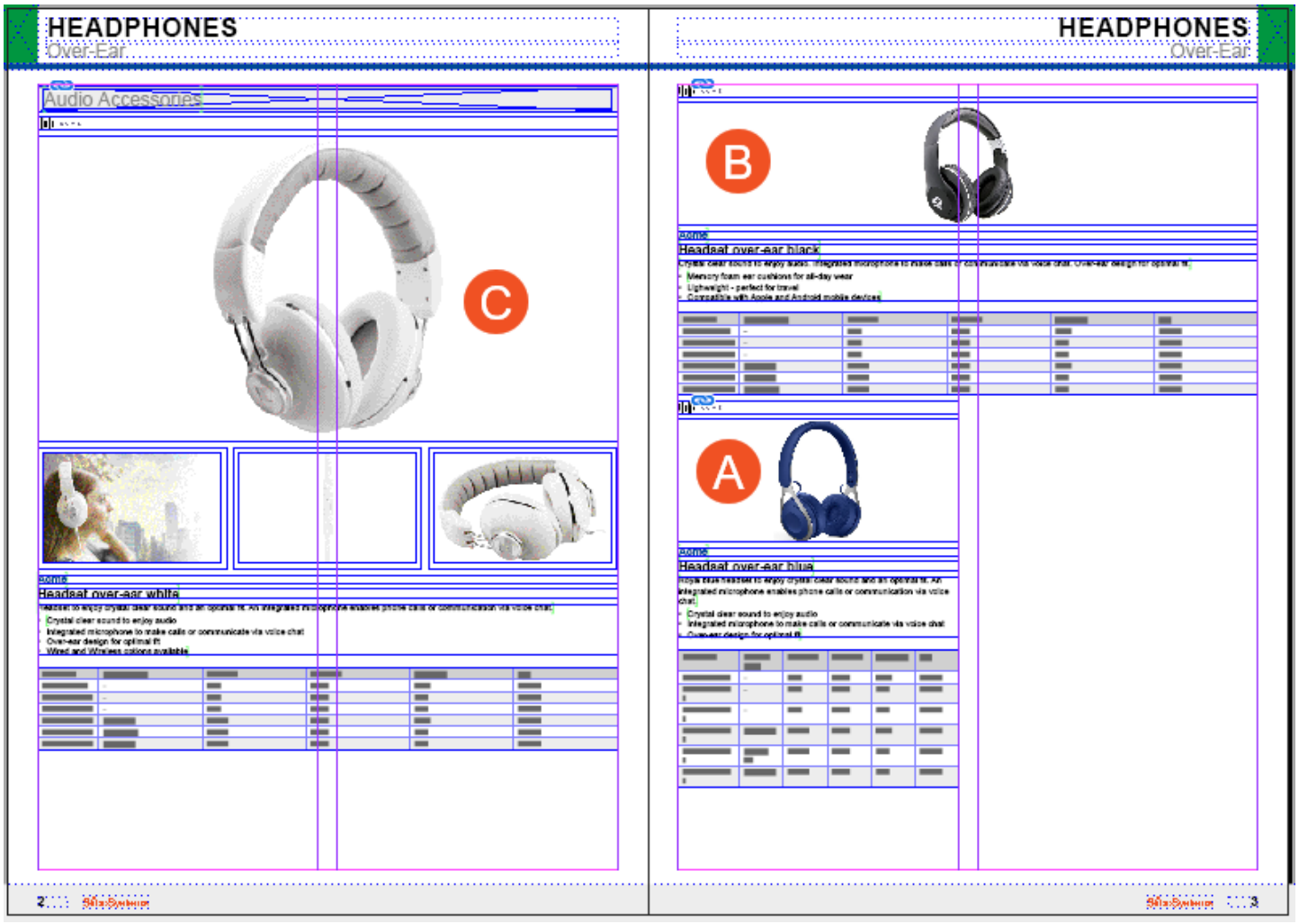


2. With the STEP Structure View open, select all products to mount, then drag and drop them onto the page at once. For the purposes of this example, only the products specified in the pagination rules are used.

> **Note:** Since the product templates are being pulled from STEP, no template needs to be selected in the Template dropdown at the bottom of the STEP Structure View panel.



3. When the products are mounted, the layouts from the product templates specified in the pagination rules are used. The letters in the below screenshot correspond to the product templates (Product Template Type A, Product Template Type B, and Product Template Type C).

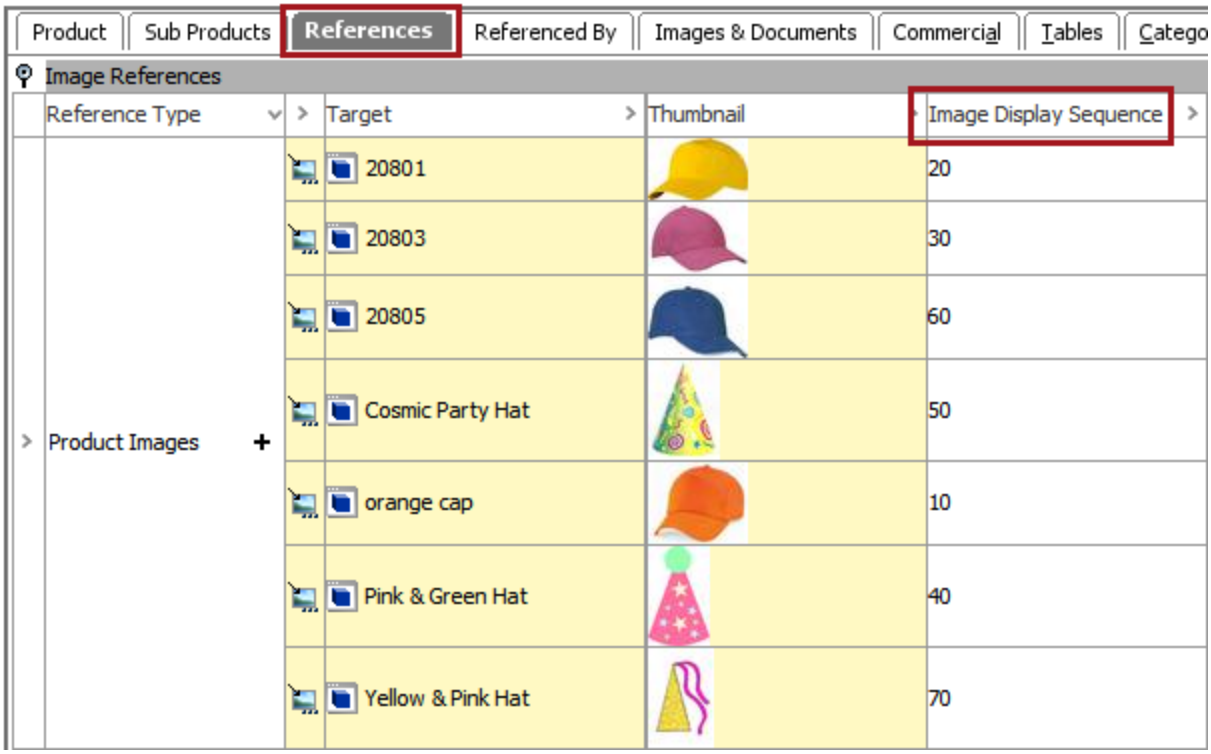

HEADPHONES
Over-Ear
Audio Accessories
C
Name
Headset over-ear white
Crystal clear sound to enjoy audio
Integrated microphone to make calls or communicate via voice chat
Over-ear design for optimal fit
Wired and Wireless colors available
2
HEADPHONES
Over-Ear
B
Name
Headset over-ear black
Memory foam ear cushions for all-day wear
Lightweight - perfect for travel
A
Name
Headset over-ear blue
Crystal clear sound to enjoy audio
Integrated microphone to make calls or communicate via voice chat
3

Sequencing Images in STEP Publisher

In STEP Publisher, assets can be mounted in a specified sequence on InDesign pages by using an **Asset Order Meta-attribute** that is valid on the link between products and image reference types. This attribute is used for asset reference types that allow for multiple references.

If there are multiple references from a product to various images using the same reference type (for example, 'Product Images'), and the product template calls out the Product Images, then all of the images will mount to the page. However, without configuring an asset order meta-attribute to control their sequence, they will mount in the alphabetically / numerically sorted order that they appear in the workbench.

This topic explains how to create and configure an asset order meta-attribute, how to configure image frames on product templates to mount multiple images at one time, how to tile these images, and how to sequence them.

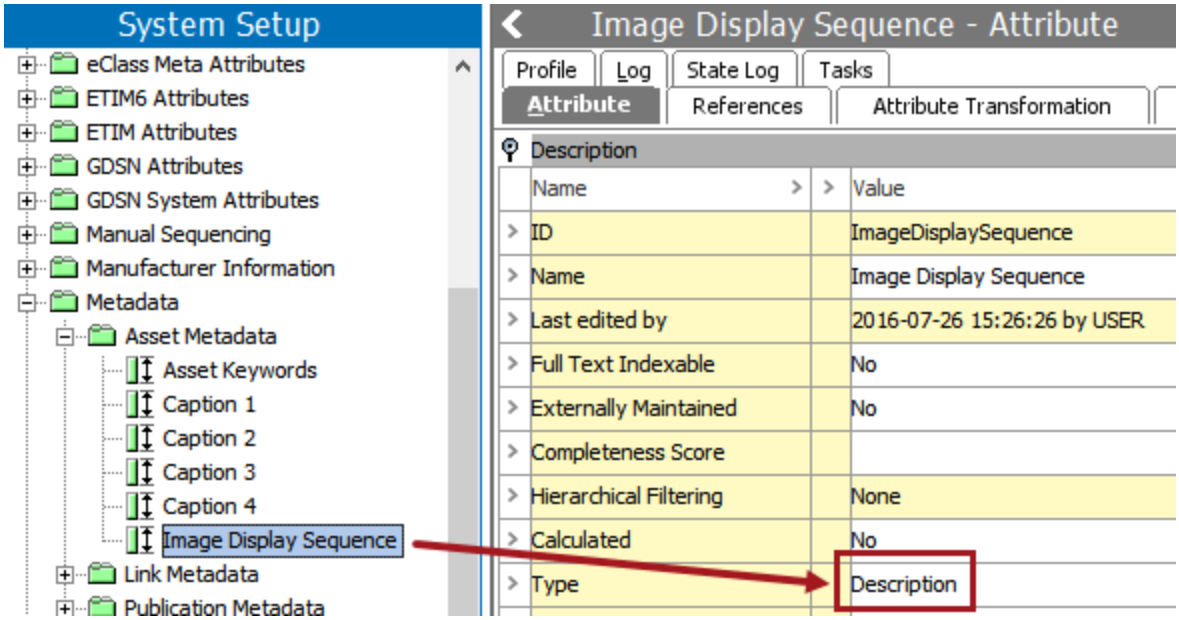


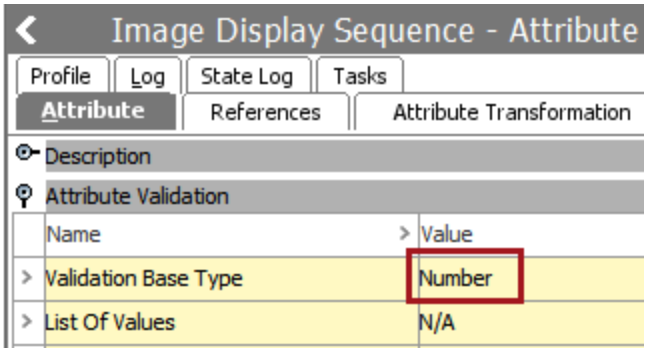
Creating and Configuring the Asset Order Meta-attribute

If your system does not already have an attribute that is dedicated for use as the asset order meta-attribute, you can create this attribute with the following steps.

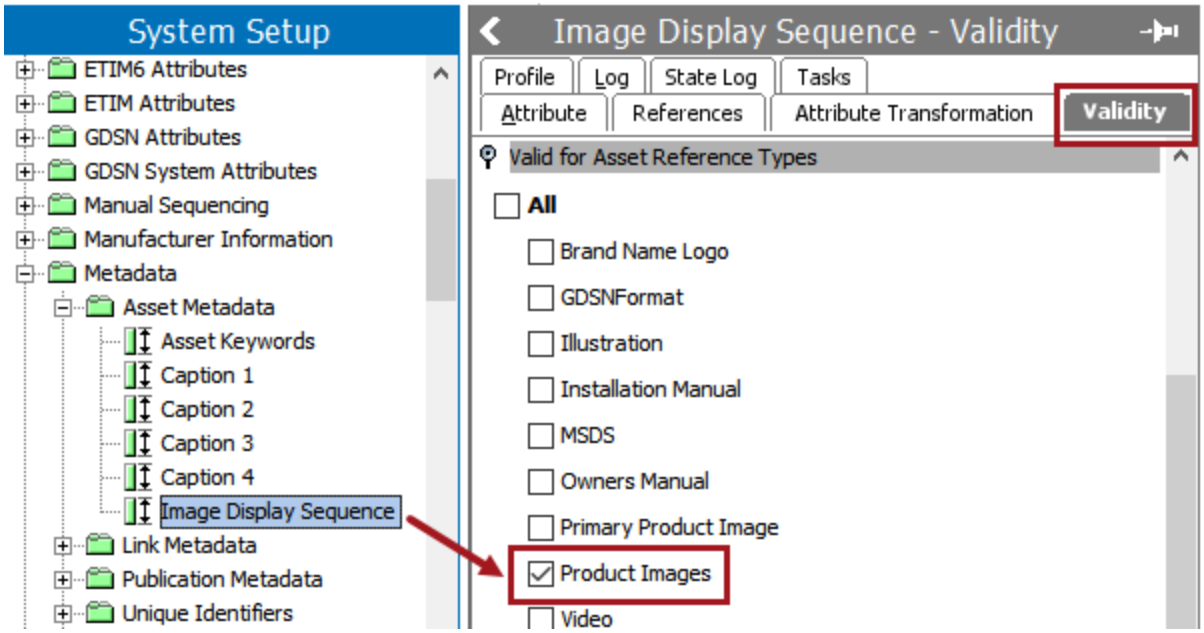
1. Create a description attribute following the steps outlined in the **Creating Attributes** topic in the **System Setup** / **Super User Guide** documentation. A suggested location for the attribute is within a 'Metadata' folder.

2. The following screenshot shows an attribute with a STEP ID of **ImageDisplaySequence** and a name of **Image Display Sequence**. It is recommended to give the attribute an easily identifiable ID and name so it will not be confused with other sequencing attributes, such as an attribute display sequence attribute. The same attribute cannot be used for both image display and attribute display.The attribute must have a Type of **Description** and a Validation Base Type of **Number**.

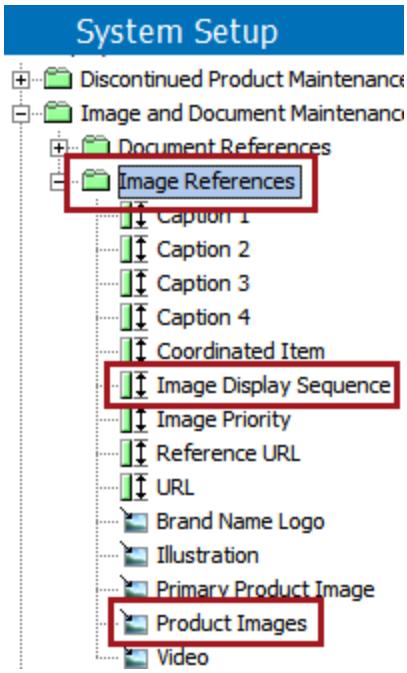




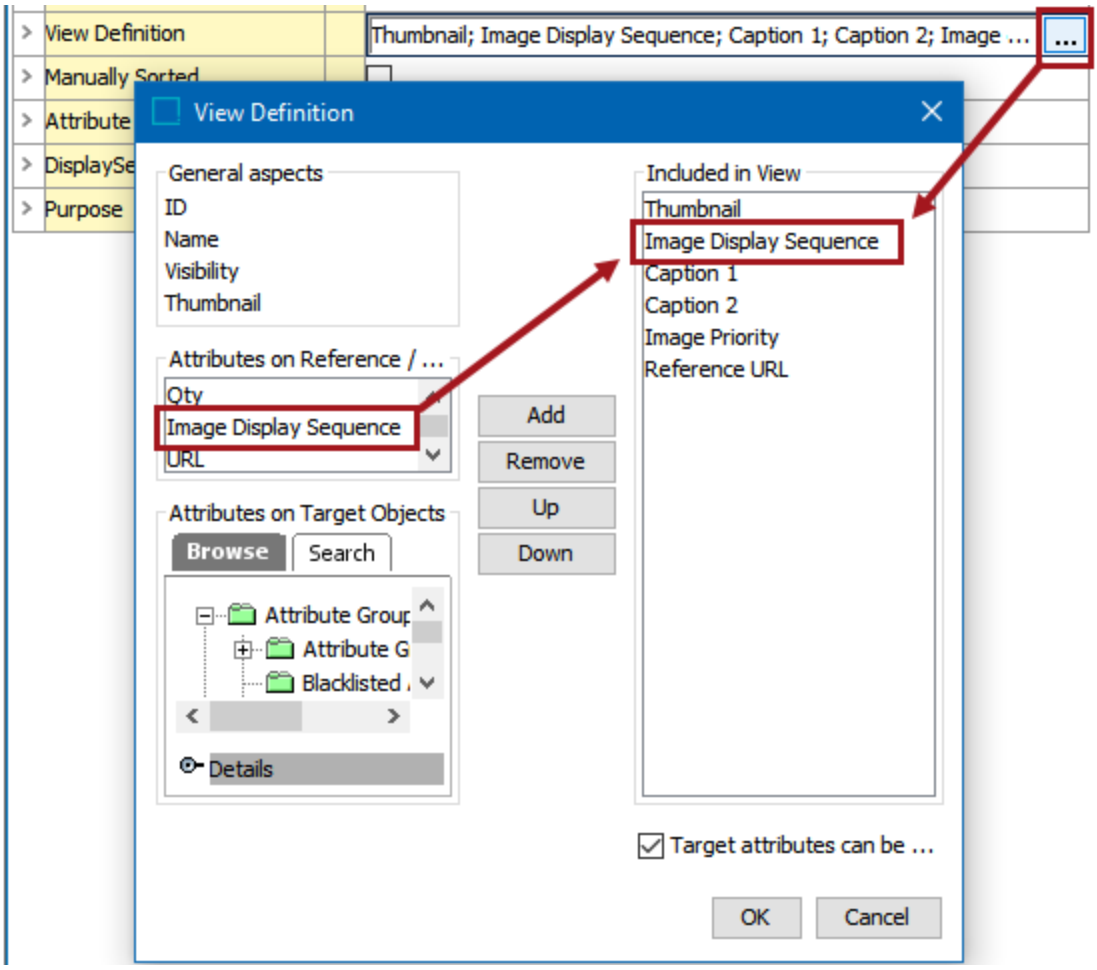
3. On the **Validity** tab for the attribute, make the attribute valid on the asset reference types that you will be using it for. In this example, the Image Display Attribute is valid on the Product Images reference type.



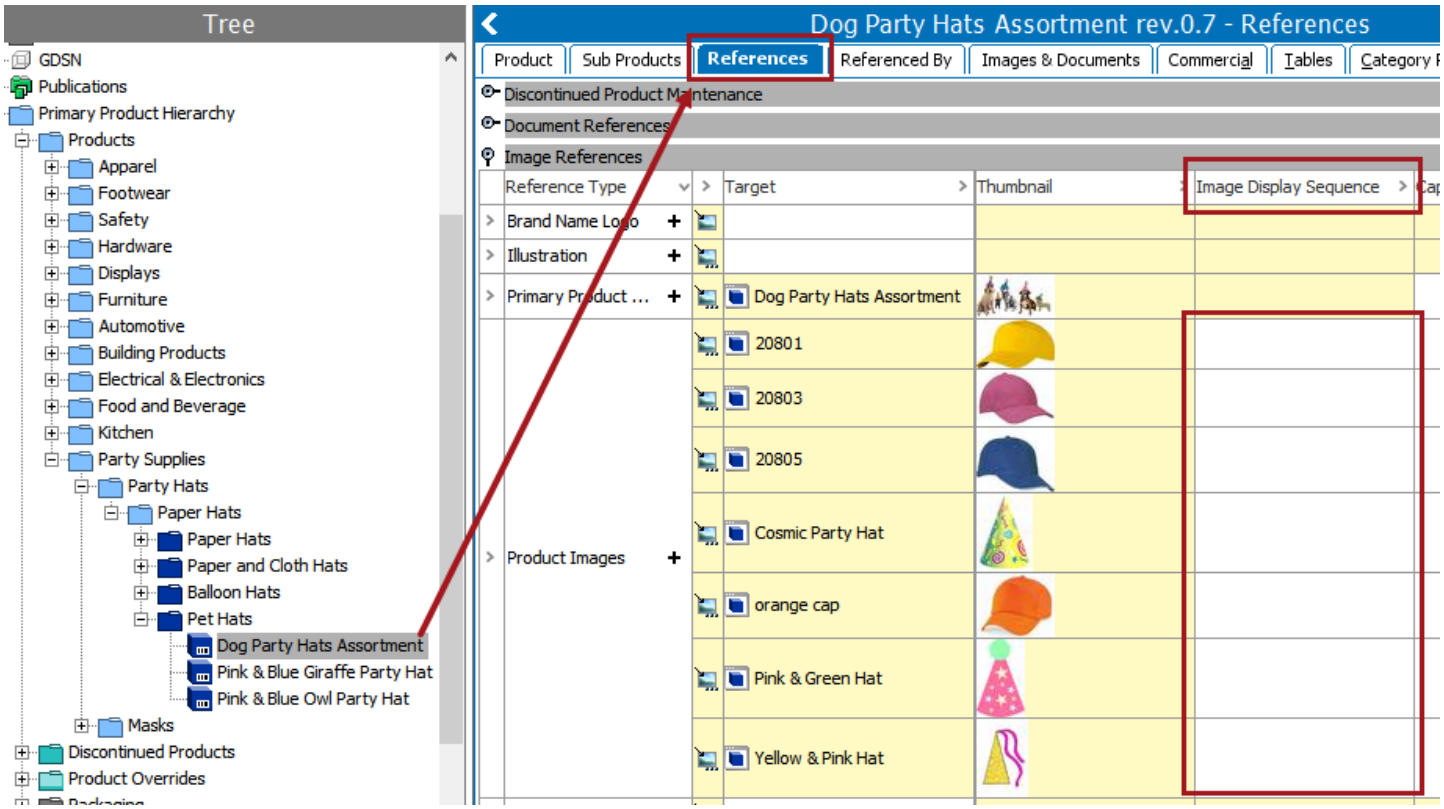
4. The attribute must also be placed into an attribute group that contains the relevant asset reference type(s) for which the attribute is valid.



5. The **View Definition** for the attribute group that contains the asset order meta-attribute and associated asset reference type must be configured to display the asset order meta-attribute on the links between the assets and the product on the **References** tab in the workbench. For details on how to configure a view definition for an attribute group, see the **Attribute Groups** topic in the **System Setup / Super User Guide** documentation.

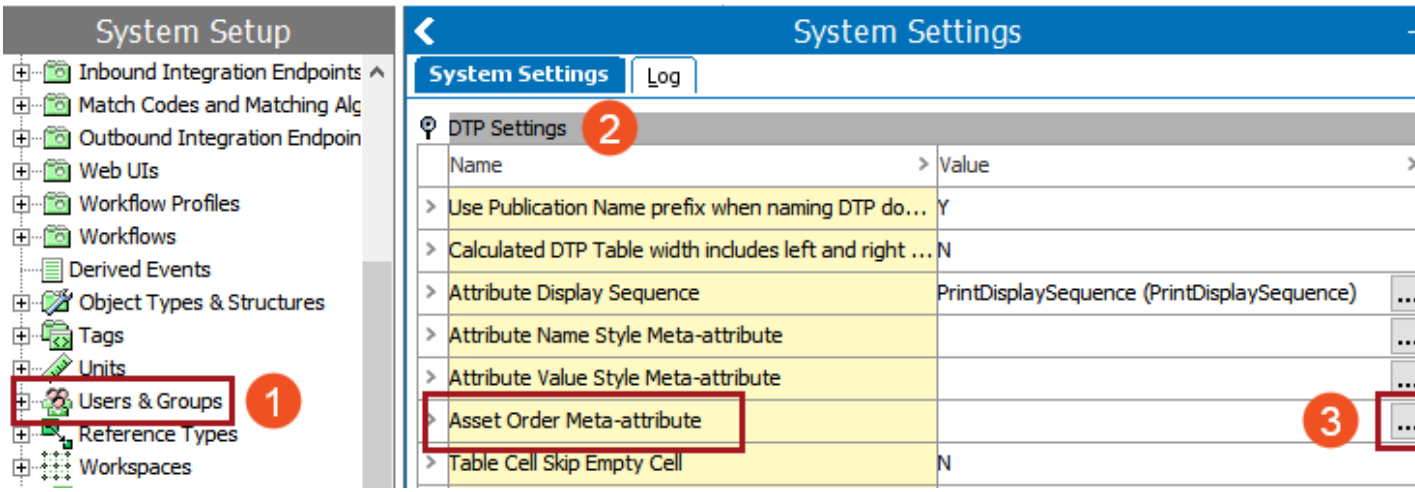


6. After the View Definition is configured, the Image Display Sequence attribute will be visible on the References tab of your product on the link between the product object and the assets. The below screenshot shows seven images linked to the product using the Product Images reference type and a column containing the Image Display Sequence attribute.

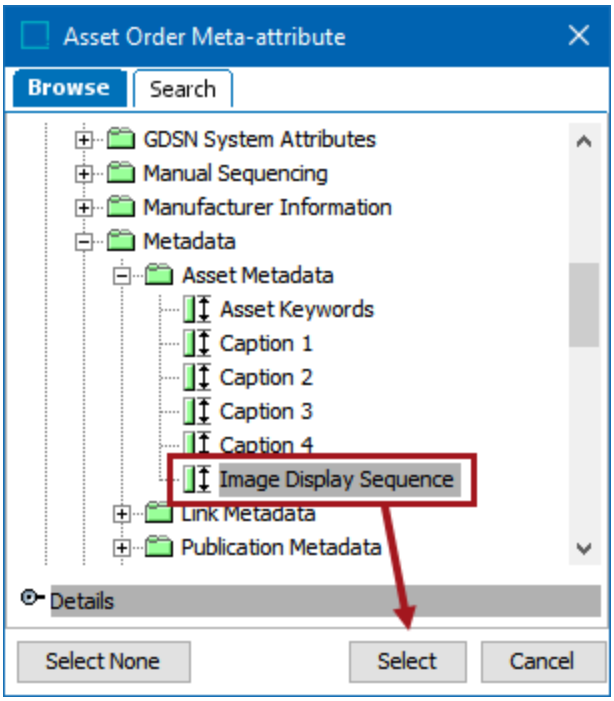


7. In order for the sequencing attribute to take effect on InDesign pages, the attribute must be designated as the **Asset Order Meta-attribute** in System Settings.

   - Navigate to System Setup > Users & Groups, System Settings, then expand the **DTP Settings** flipper.
   - Click the ellipsis button (...) in the **Asset Order Meta-attribute** field.



   - In the Asset Order Meta-attribute dialog that displays, browse to or search for the asset ordering attribute, then click **Select**.



- The attribute is now set as the system-wide asset order meta-attribute.

Setting the Sequence of Images in STEP

Once the Image Display Sequence attribute is available on the References tab and has been set as the asset order meta-attribute, the next step is to designate the order in which you would like the images to mount.

1. Navigate to your product object in the Tree, then click on the **References** tab.
2. Enter numbers in the asset order meta-attribute fields (in this example, Image Display Sequence) to designate the order in which you would like the images to mount.

In this example, seven product images are ordered in increments of 10. This method of numbering is recommended practice in case the images need to be rearranged later or if a new image needs to be added to the group. For example, if an image is added later but needs to mount in the third position, it can be numbered 21 and the numbering on the other images can be left as-is.

Thumbnail	Image Display Sequence
	20
	30
	60
	50
	10
	40
	70

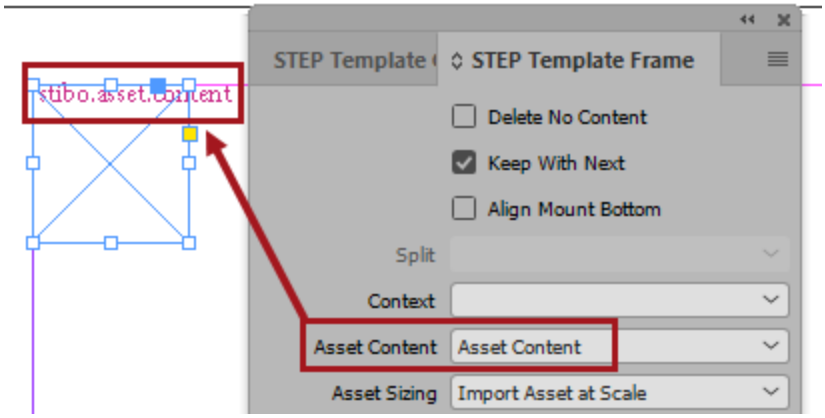
Tiling Images in Individual Frames on InDesign pages

Once the asset order meta-attribute has been created and configured, the next step is to configure the image frame on your product template to tile multiple assets across the page. These configurations are applied using the **STEP Template Frame** panel.

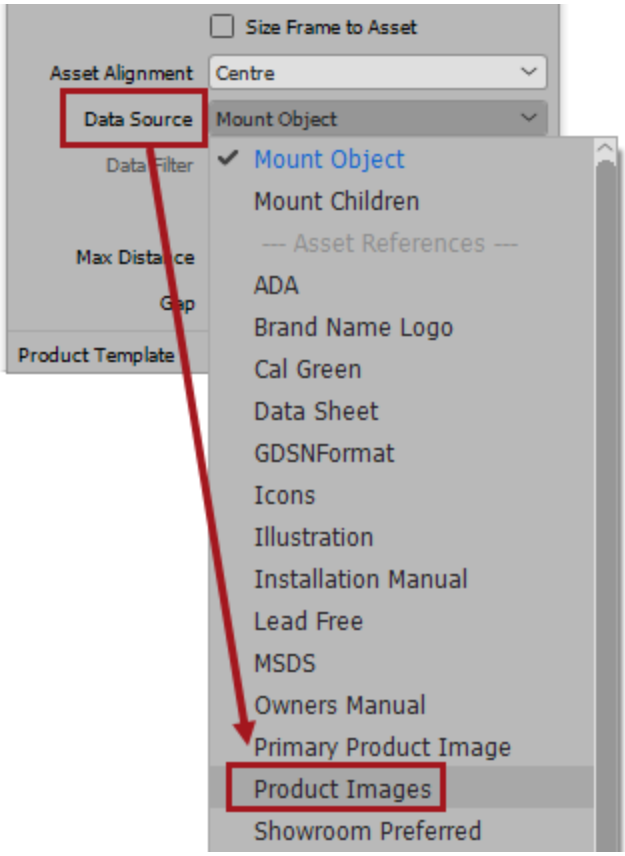
Configuring the Product Template to Tile Image Frames

The following steps assume that you have already created a product template with an image frame, the template is open in InDesign, and the **STEP Template Frame** panel is also open. For more detailed information on all available options on STEP Template Frame panel for image frames, see the **Image Frame Parameters** topic.

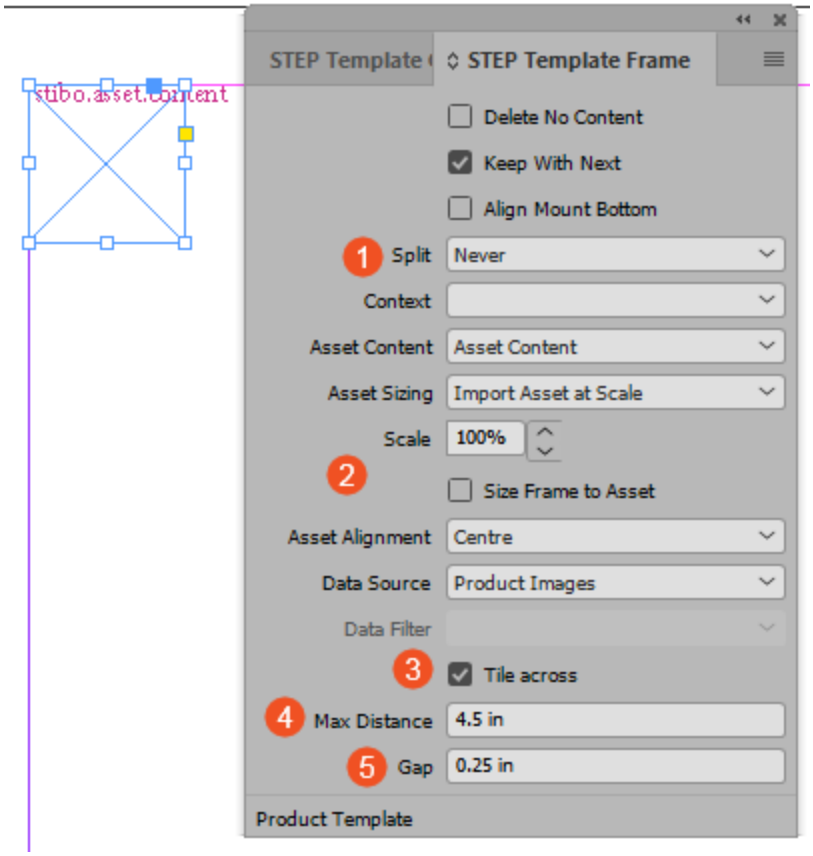
1. Select the image frame on your product template, then click on the **Asset Content** dropdown list and select 'Asset Content.' If adornments are visible on your template, the frame will display **stibo.asset.content**.



2. Next, click on the **Data Source** dropdown list and select the desired asset reference type, for example, Product Images.

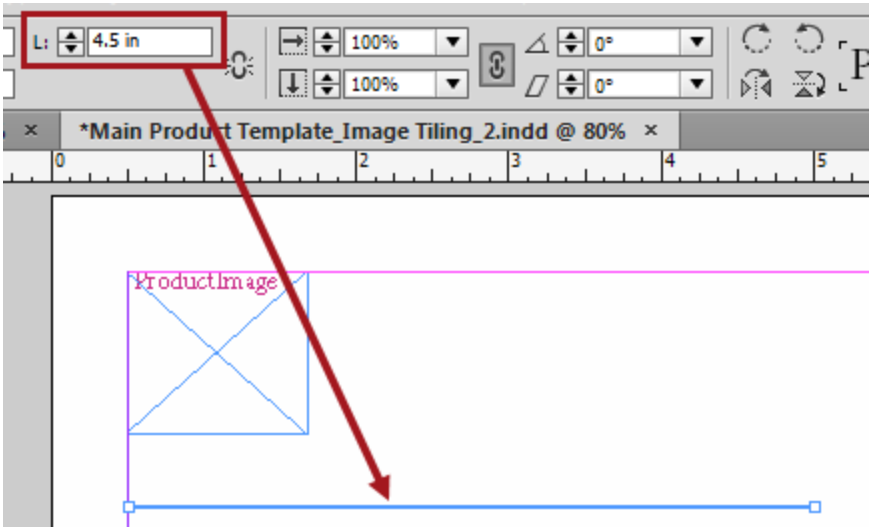


3. The following STEP Template Frame parameters must also be applied to the image frame. The numbers in the following screenshot correspond to the numbers in the list below the screenshot.



- (1) Select a **Split** setting to determine what should happen if there are so many images that they tile off of the page when mounted. In this example, the split setting of 'Anywhere' means that a new page will be created if the images cannot fit on one page.
- (2) The selections chosen for **Asset Sizing**, **Scale**, **Size Frame to Asset**, and **Asset Alignment** are up to the user. In this example, the settings ensure that the assets will be scaled to the size of their frames and centered within the frames.
- (3) The **Tile across** checkbox must be selected in order for the images to tile horizontally across the page. If left unchecked, the images will mount vertically.
- (4) A **Max Distance** must be entered to tell the system how far across the page the images should tile before wrapping around to a second row. If no distance is set, the images will tile off of the edge of the page if there are too many to fit in a single row. Max distance starts at the left edge of the image frame and ends at the point where you would like the tiling to start over on a second row.

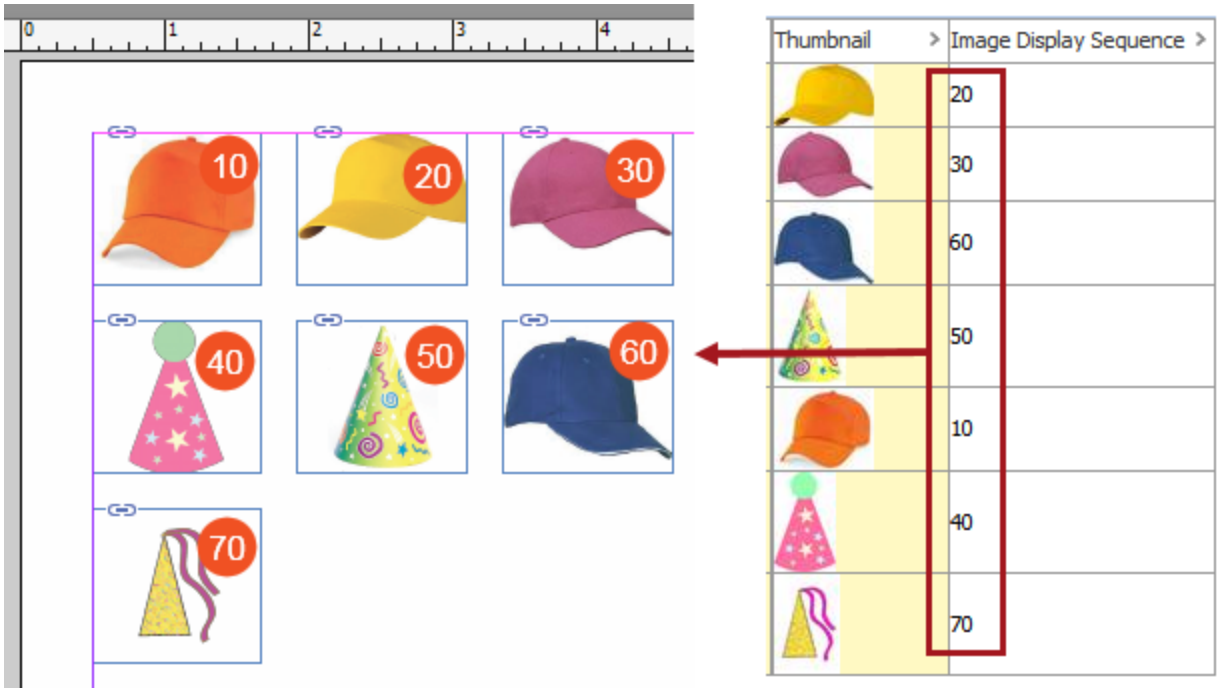
  One method of determining max distance is to draw a line on the product template that aligns with the left edge of the image, then enter the length of that line into the Max Distance field. Delete the line once you have determined its length.



- (5) A **Gap** distance must be set if you would like space to appear between the image frames when mounted.

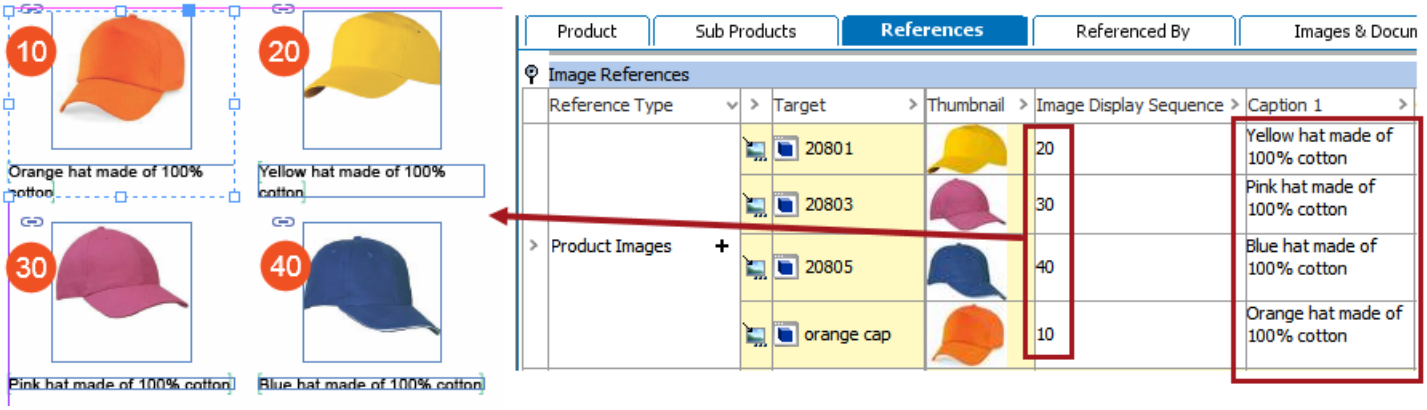
Note: The **Gap** distance should be factored in when setting **Max Distance**.

4. When the product is mounted, the images appear in the location on the page designated by the template and in the order specified in STEP. See the **Mounting Products** topic for more information on how to mount objects to InDesign pages.



Sequencing Grouped Image Frames

Image frames that are part of tiled grouped frames, which are commonly used to mount images with metadata captions, can also be sequenced using the steps outlined in this topic. For information on images in grouped frames, see the **Mounting Images With Metadata Captions** topic.

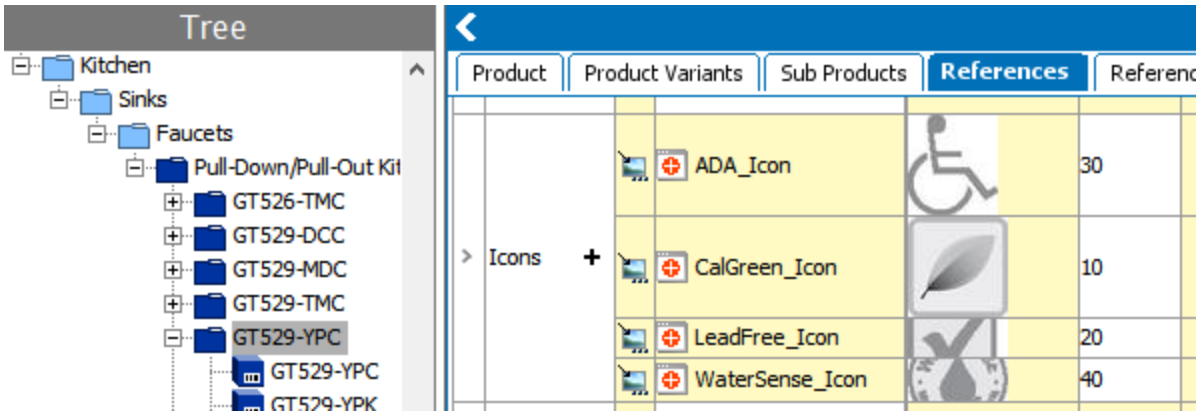


Tiling Multiple Images Within a Single Frame

Note: Image sequencing works the same whether images are tiled within a single frame or in individual frames.

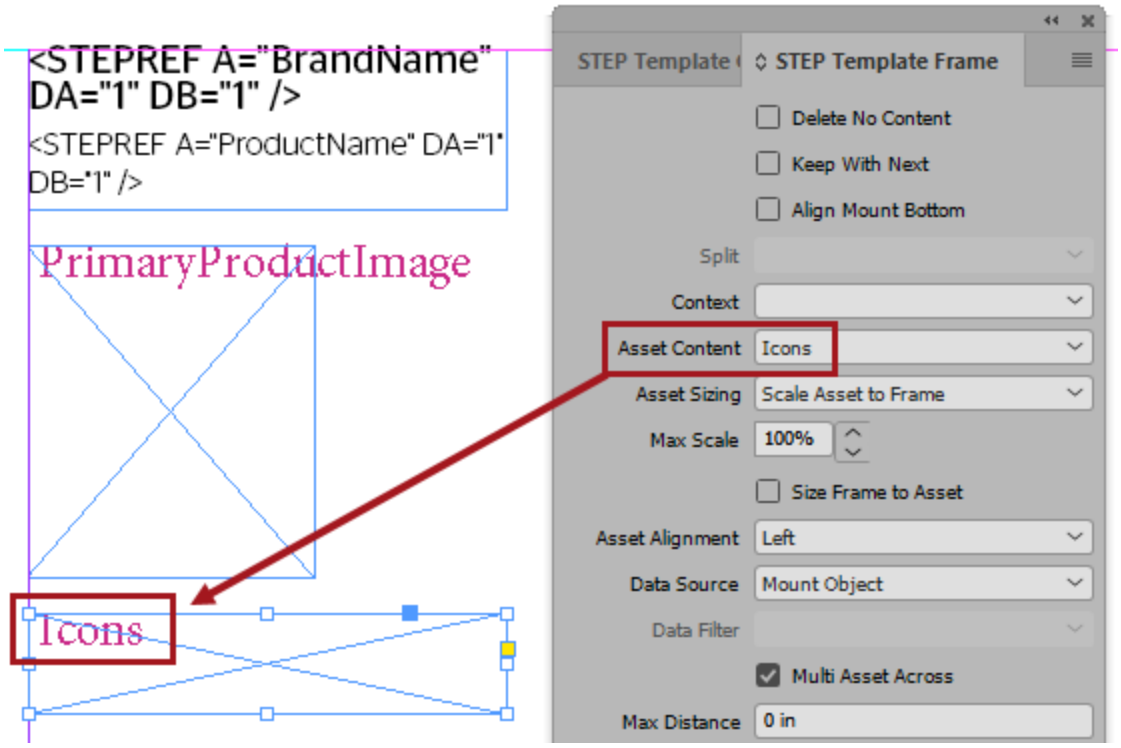
Multiple images can be tiled within a single frame using the **Multi Asset Across** function. In order for images to be tiled, all images must be of the same asset reference type and the asset reference type must allow multiple references.

Typically, image sequencing for multiple images in a single frame is used for small icons that need to be sequenced in a certain order. This example uses a kitchen sink product that appears on the page along with icons indicating that the faucet meets the following compliance standards: ADA, Cal Green, NSF Lead-Free, and EPA WaterSense. An asset reference type named **Icons** is used.

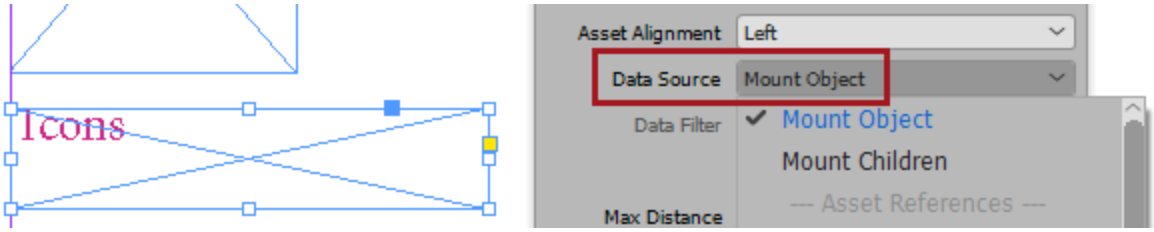


Configuring the Product Template Image Frame

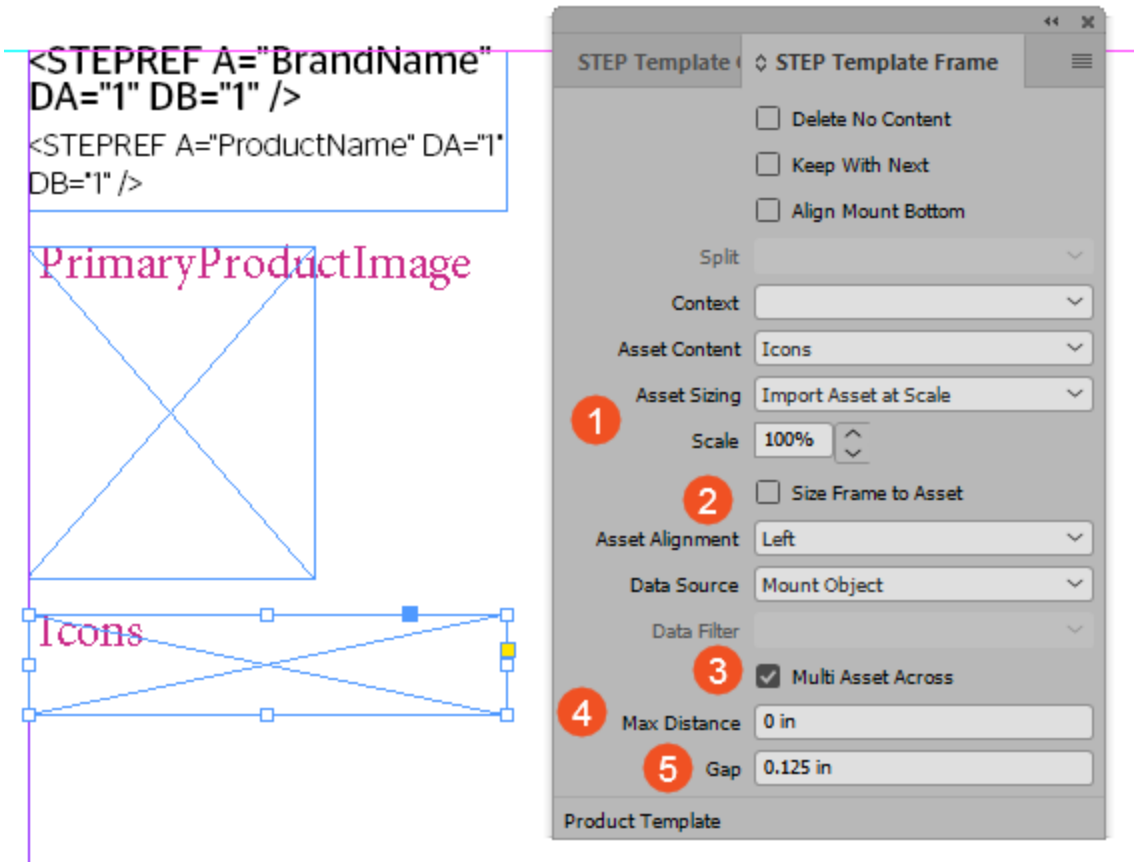
1. Select the image frame on your product template, then click on the **Asset Content** dropdown list and select the desired asset reference type, for example, Icons.



2. If not automatically selected when you chose the asset reference type, click on the **Data Source** dropdown list and choose **Mount Object**.

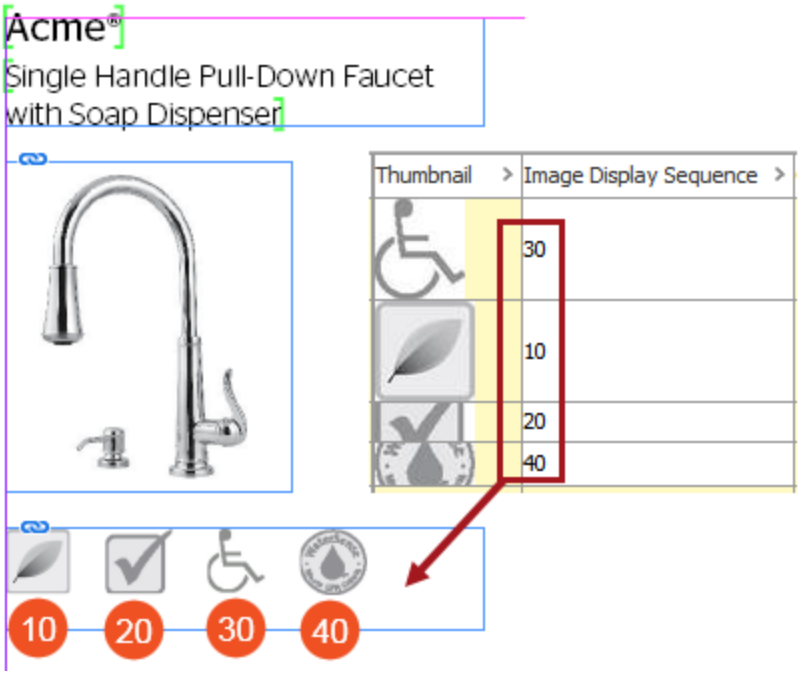


3. The following STEP Template Frame parameters must also be applied to the image frame. The numbers in the following screenshot correspond to the numbers in the list below the screenshot.



- (1) The selections chosen for **Asset Sizing** and **Max Scale** are up to the user. In this example, the settings ensure that the assets will be imported at actual size (100%). Recommended practice when using small images such as icons is to load them into STEP at the actual size they will appear on the page. However, if they are not actual size, they can be scaled to be either smaller or larger by changing the **Scale** value. (Note that this will apply equally to all images in the frame.) For more information on asset sizing parameters, see the **Image Frame Parameters** topic.
- (2) The selections chosen for **Size Frame to Asset** and **Asset Alignment** are also up to the user. In this example, the settings ensure that the frame remains its original size and that the icons are aligned to the left.
- (3) The **Multi Asset Across** checkbox must be selected in order for the images to tile horizontally across the frame. If left unchecked, the images will mount vertically.
- (4) A **Max Distance** can be entered to tell the system how far across the frame the images should tile before wrapping around to a second row. 0 is the default. If no distance is set, the images will tile to the edge of the frame, then wrap around to a second row automatically. Max distance starts at the left edge of the image frame and ends at the point where you would like the tiling to start over on a second row.
- (5) A **Gap** distance must be set if you would like space to appear between the tiled images.

4. When the product is mounted, the images appear in the frame in the order specified in STEP.


Acme®
Single Handle Pull-Down Faucet
with Soap Dispenser
Thumbnail
Image Display Sequence
30
10
20
40
10
20
30
40

Mounting Images With Metadata Captions

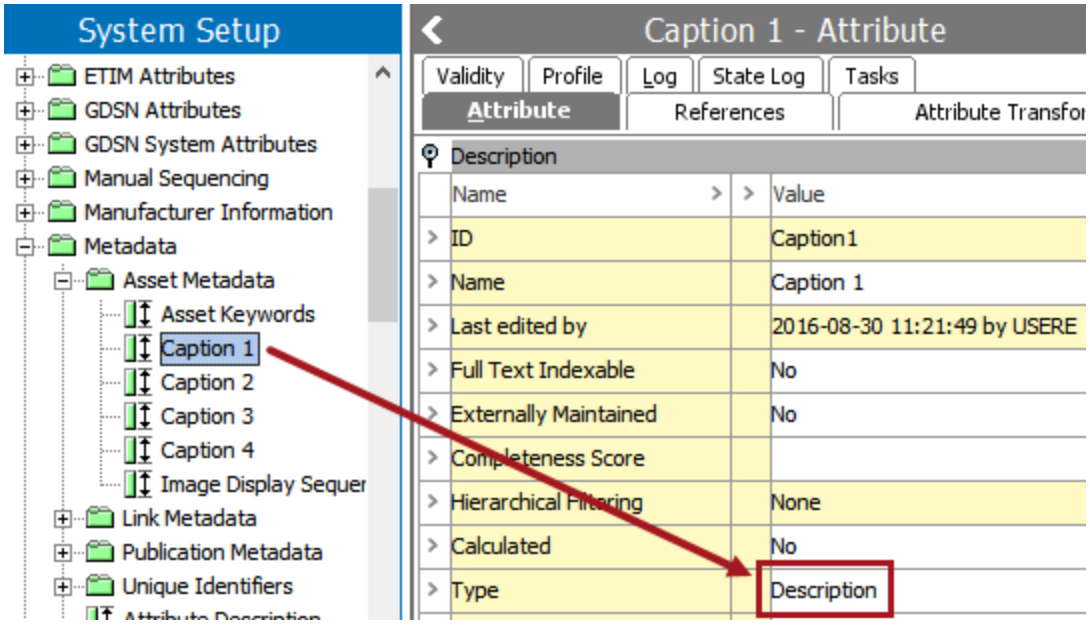
To keep the number of caption attributes at a minimum in STEP, image metadata captions are commonly used. Image metadata captions are description attributes that are made valid for Asset Reference types. As such, they exist on the link between products and assets. **Grouped frames** are used on product templates to mount these captions along with their corresponding images onto InDesign pages.

Using metadata captions for images keeps the number of caption attributes low because a single metadata attribute can be used, for example, on seven images that are linked to a single product, as opposed to needing seven different caption attributes. Another advantage to using caption attributes that are valid for an asset *reference* type, as opposed to using a description attribute that is valid on the asset type itself, is that the caption is not attached to the asset, and can change from product to product that the image is linked to.

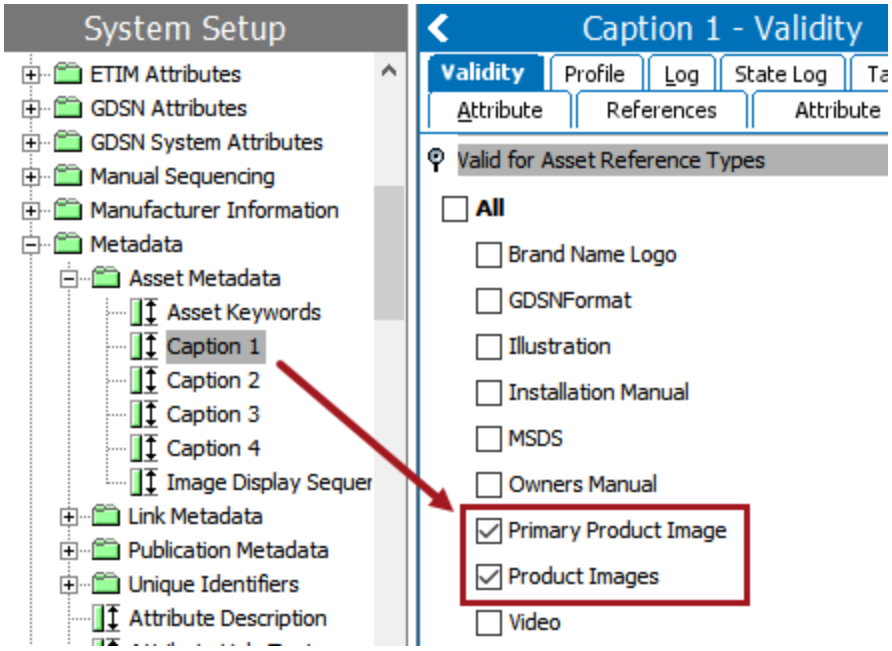
Configuring a Metadata Caption Attribute

Metadata image caption attributes are created and configured like any other description attribute that is made valid on an asset reference type. If your system does not already have attribute(s) that are being used for image captions, you can create them with the following steps.

1. Create a description attribute following the steps outlined in the **Creating Attributes** topic in the **System Setup** / **Super User Guide** documentation. A suggested location for the attribute is within a 'Metadata' or 'Asset Metadata' folder.
2. The following screenshot shows a sample attribute with a STEP ID of **Caption1** and a name of **Caption 1.** The attribute must have a Type of **Description**.

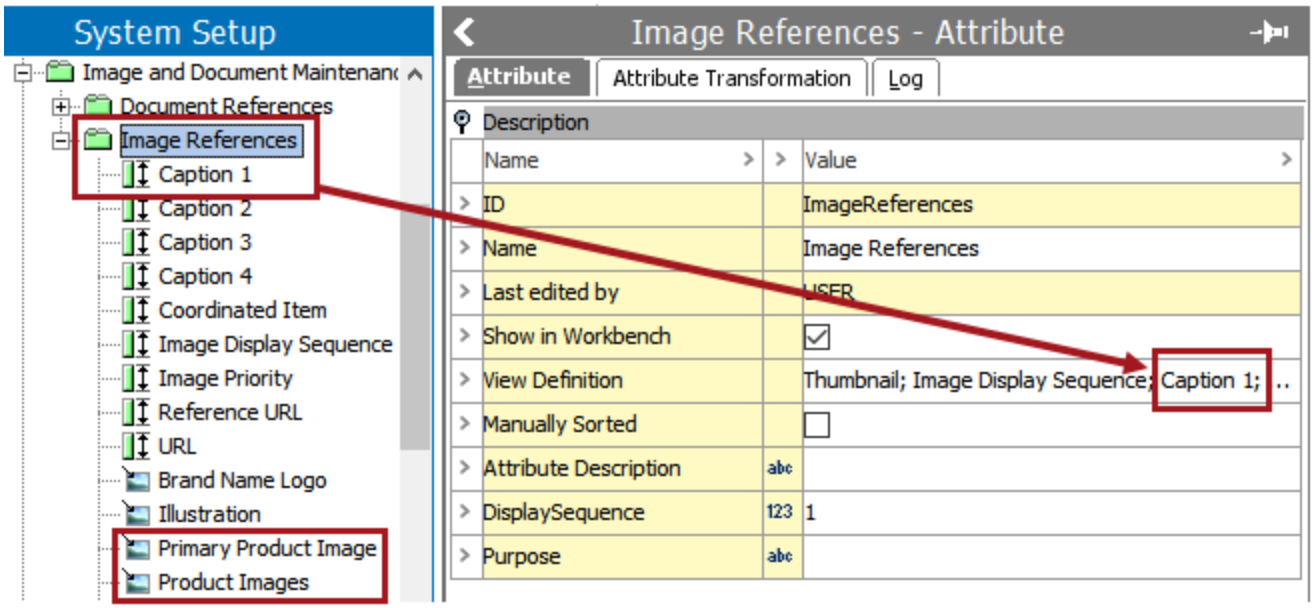


3. On the **Validity** tab for the attribute, make the attribute valid on the asset reference types that you will be using it for. In this example, the Caption 1 attribute is valid on the 'Primary Product Image' and 'Product Images' reference types.

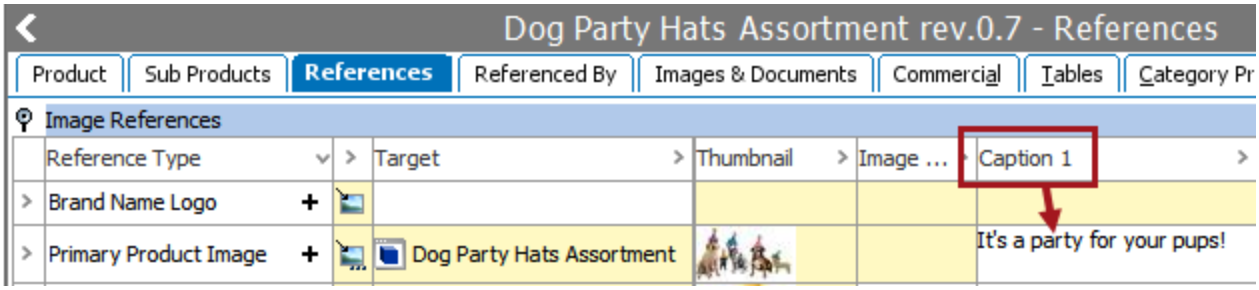


4. Lastly, the attribute must be placed into an attribute group that contains the relevant asset reference type(s) for which the attribute is valid. This attribute group must have its **View Definition** configured to display the caption attribute on the reference links between the assets and the product on the **References** tab in the workbench.

   For details on how to configure a view definition for an attribute group, see the **Attribute Groups** topic in the **System Setup** / **Super User Guide** documentation.



5. After the View Definition is configured, the caption attribute will be visible on the **References** tab of your product on the link between the product object and the asset(s). The below screenshot shows the Caption 1 attribute on the link between the product object and the asset linked with the Primary Product Image asset reference type.

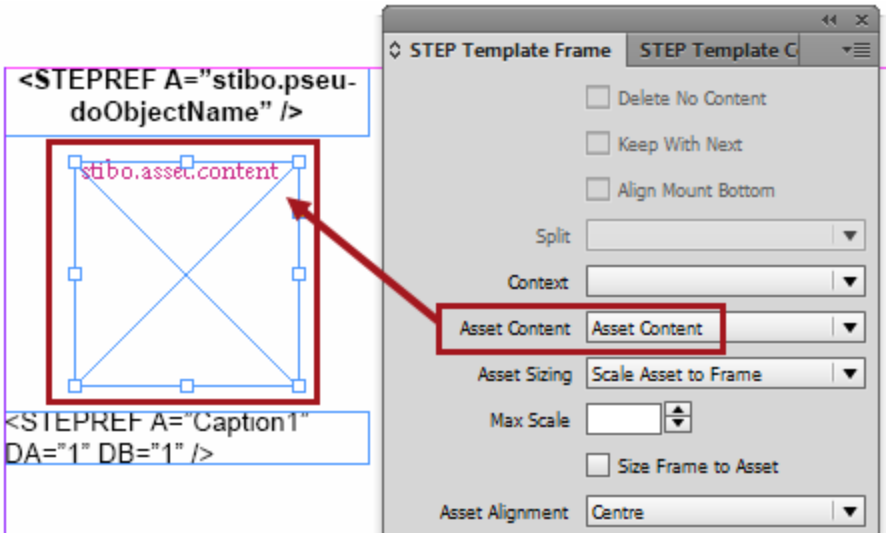


Configuring the Product Template to Mount a Metadata Image Caption

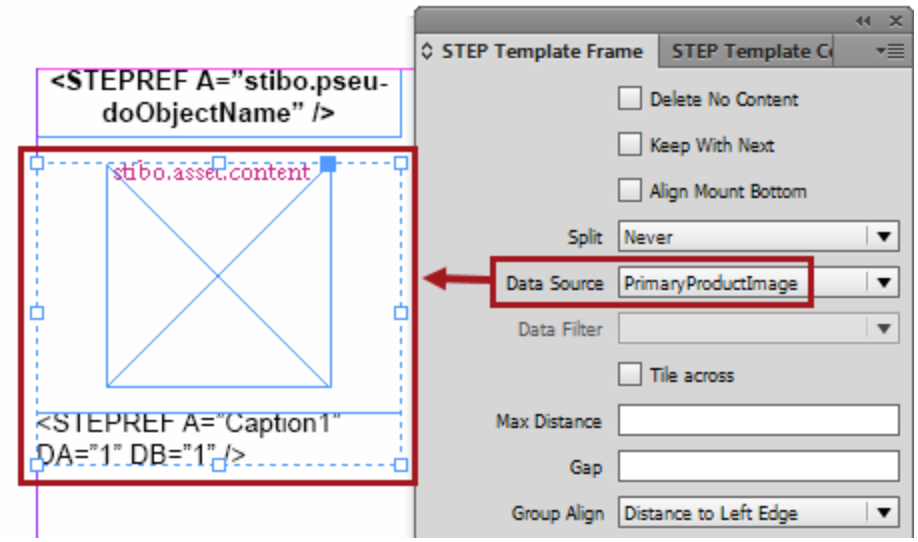
Once the image caption attribute has been created and configured, the next step is to configure a **grouped frame** on your product template that contains an image frame for the asset and a text frame for the caption. These configurations are applied using the **STEP Template Frame** panel.

The following steps assume that you have already created a product template with an image frame and a text frame (which contains the STEPXML tag for the caption attribute), the template is open in InDesign, and the **STEP Template Frame** panel is also open. For more detailed information on all available options on the STEP Template Frame panel for image frames, see the **Image Frame Parameters** topic. For more detailed information on all available options on the STEP Template Frame panel for grouped frames, see the **Grouped Frame Parameters** topic.

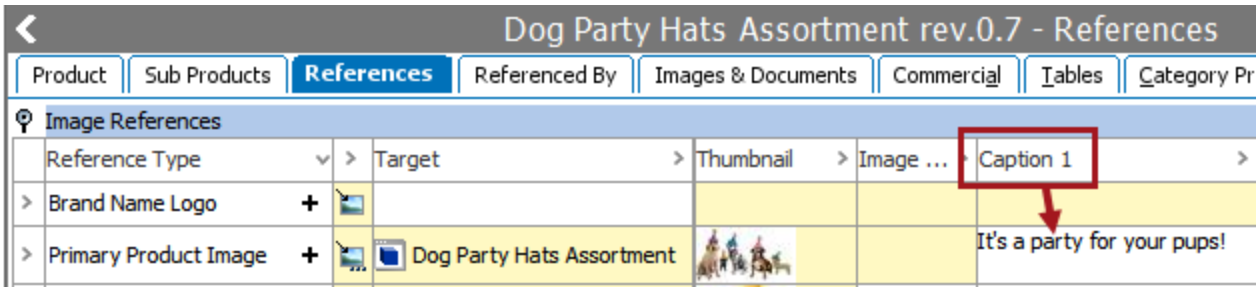
1. Select the image frame on your product template, then select **Asset Content** from the Asset Content dropdown list on the STEP Template Frame panel. This setting tells the system that the frame will contain asset *content*, but does not designate the asset reference type itself because it will be applied to the entire grouped frame in step 3 below.



2. Group the image and text frames together by following the instructions in the **Grouped Frames in Product Templates** topic.
3. Choose the relevant asset reference type from the **Data Source** dropdown list. In this example, the Primary Product Image reference type is used. Applying the reference type to the grouped frame instead of the image frame *inside* of the group tells the system that everything in the group will be pulled from this asset reference, including the caption attribute in the text frame.

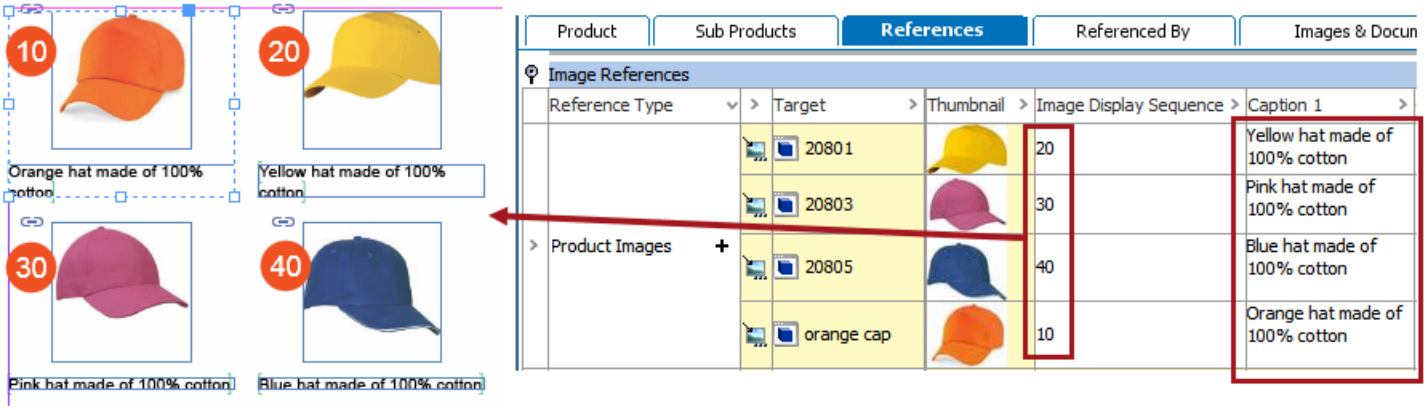


4. When the product is mounted, the image caption will appear beneath the image on the page. See the **Mounting Products** topic for more information on how to mount objects to InDesign pages.



Sequencing Grouped Image Frames

Image frames that are part of grouped frames can also be tiled and sequenced on the InDesign page when the product to which the images are linked is mounted. For information on sequencing images in InDesign, see the **Sequencing Images in InDesign** topic.

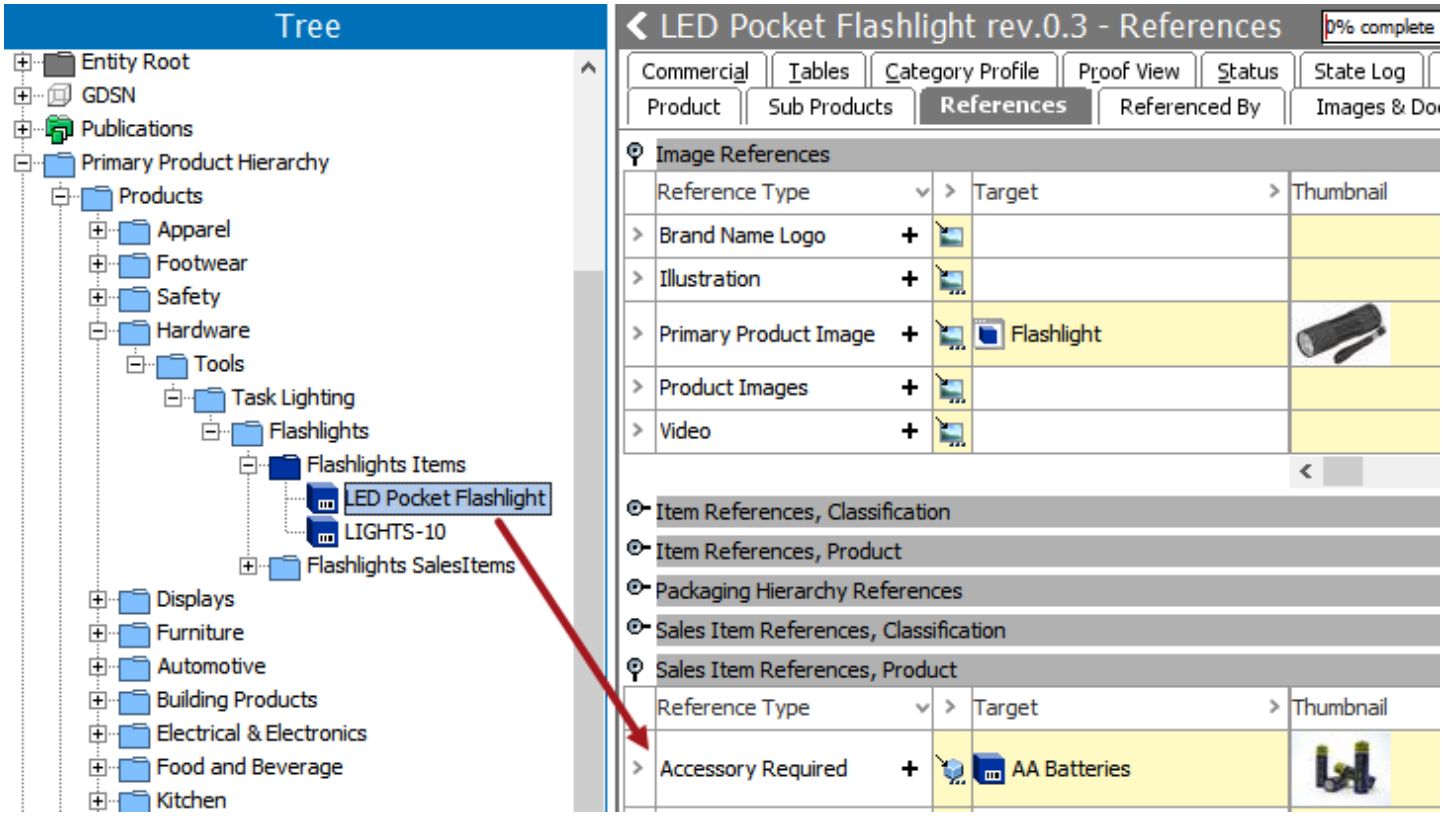


Mounting Referenced Objects

This topic explains how to mount content from referenced product, entity, and classification objects by outlining the methods for configuring the associated product template. Product templates used to mount data from referenced objects are similar to those used to mount images with metadata captions, as detailed in the **Mounting Images With Metadata Captions** topic.

Mounting Product References

The example shown in this topic mounts a product object (LED Pocket Flashlight) and an associated item (AA Batteries) using a product reference type of 'Accessory Required.'



Configuring the Product Template to Mount Data from a Referenced Product

To mount data from a product object that is referenced to the object that you are mounting, certain configurations must be applied to the frame(s) on your product template using the STEP Template Frame panel. For detailed information on this panel, see the **STEP Template Frame** topic.

The following steps assume:

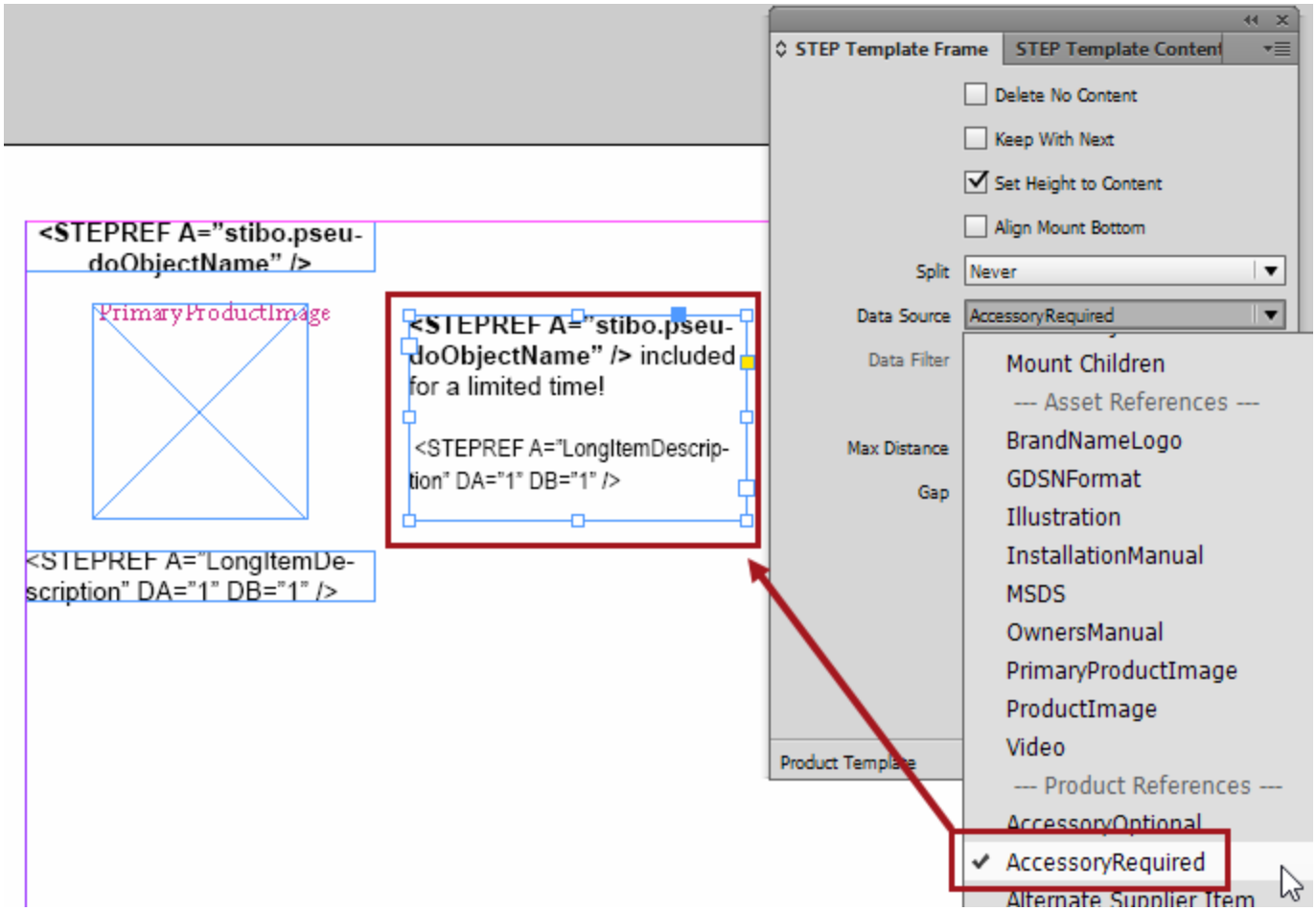
- You have already created a product template, and it is open in InDesign
- A text frame exists that contains STEPXML tags for the attribute(s) to display from the referenced product
- The STEP Template Frame panel is open
- You are familiar with the process for mounting objects to InDesign pages (see the **Mounting Products** topic for more information)

Mounting Textual Content From a Referenced Product

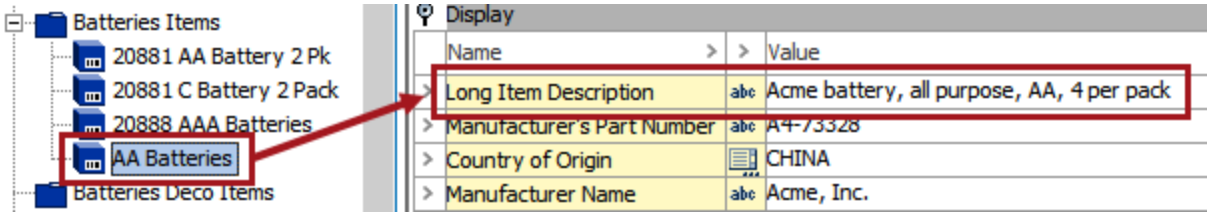
The product template used in this example is configured to pull in the STEP name, Primary Product Image, and Long Item Description attribute value from the product being mounted. A second frame, directly to the right, is configured to pull in the STEP name and Long Item Description attribute value from the referenced product.

To mount textual content from a referenced product:

1. Select the frame on your product template that contains the STEPXML attribute tags for the data to mount from the referenced product.
2. Select the relevant Product Reference from the **Data Source** dropdown list on the STEP Template Frame panel.



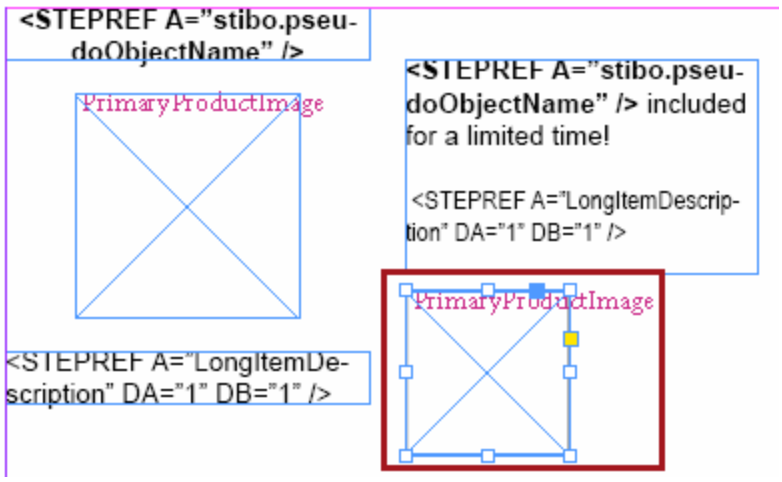
3. When the product is mounted, the data from the referenced product (AA Batteries) appears in the frame that was configured to bring in data from the Accessory Required product reference.



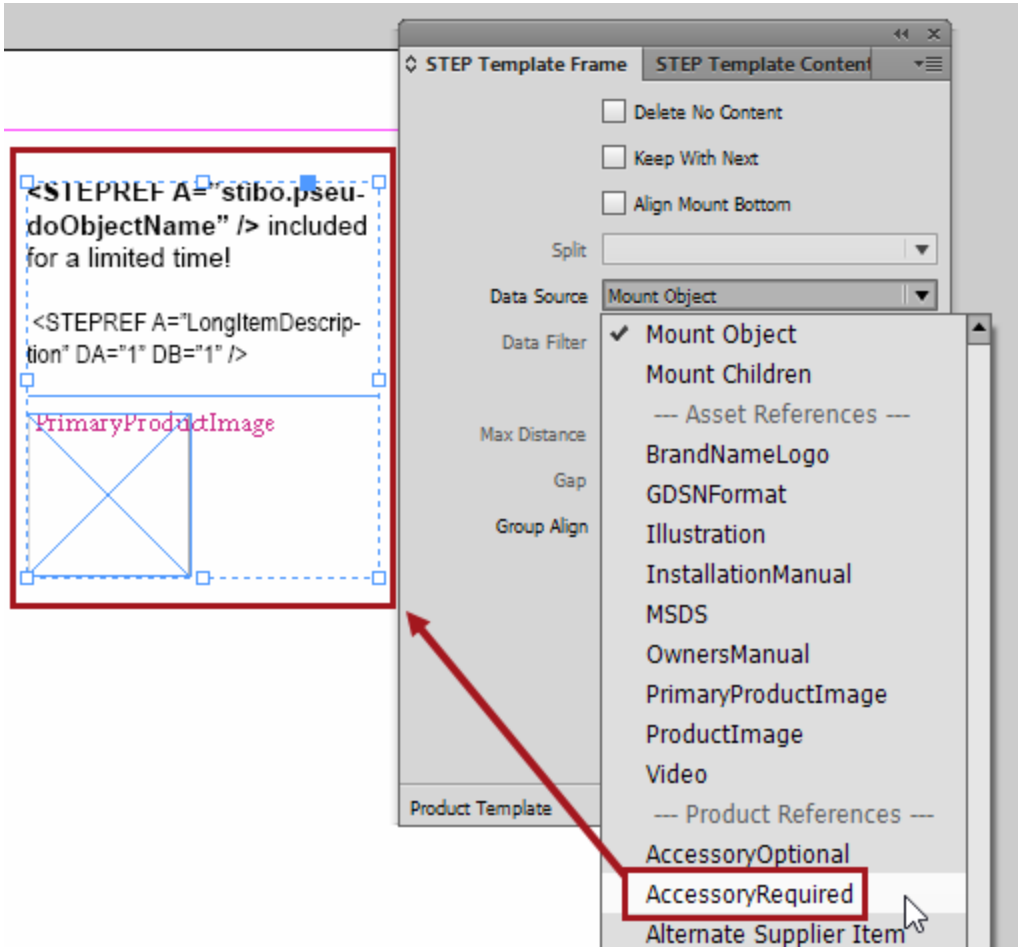
Mounting Textual and Asset Content From a Referenced Product

The following steps build on the procedure outlined in the previous section, except an asset frame will be added and grouped with the text frame to mount an asset that is linked to the referenced product.

1. Add an image frame to the product template and apply the relevant asset reference type to the frame, which is Primary Product Image in this example.



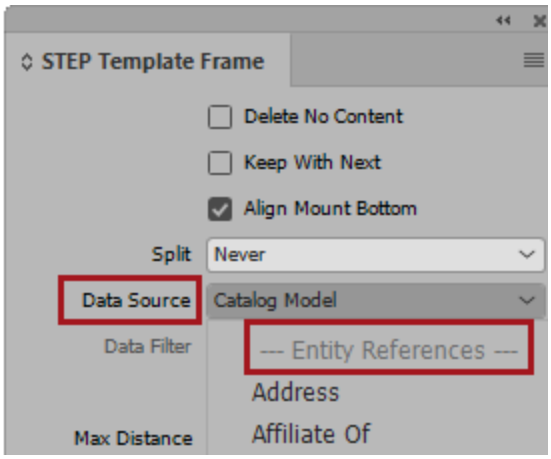
2. Group the image frame with the text frame following the instructions provided in the **Grouped Frames in Product Templates** topic.
3. Select the grouped frame, then select the relevant Product Reference from the **Data Source** dropdown list on the STEP Template Frame panel.



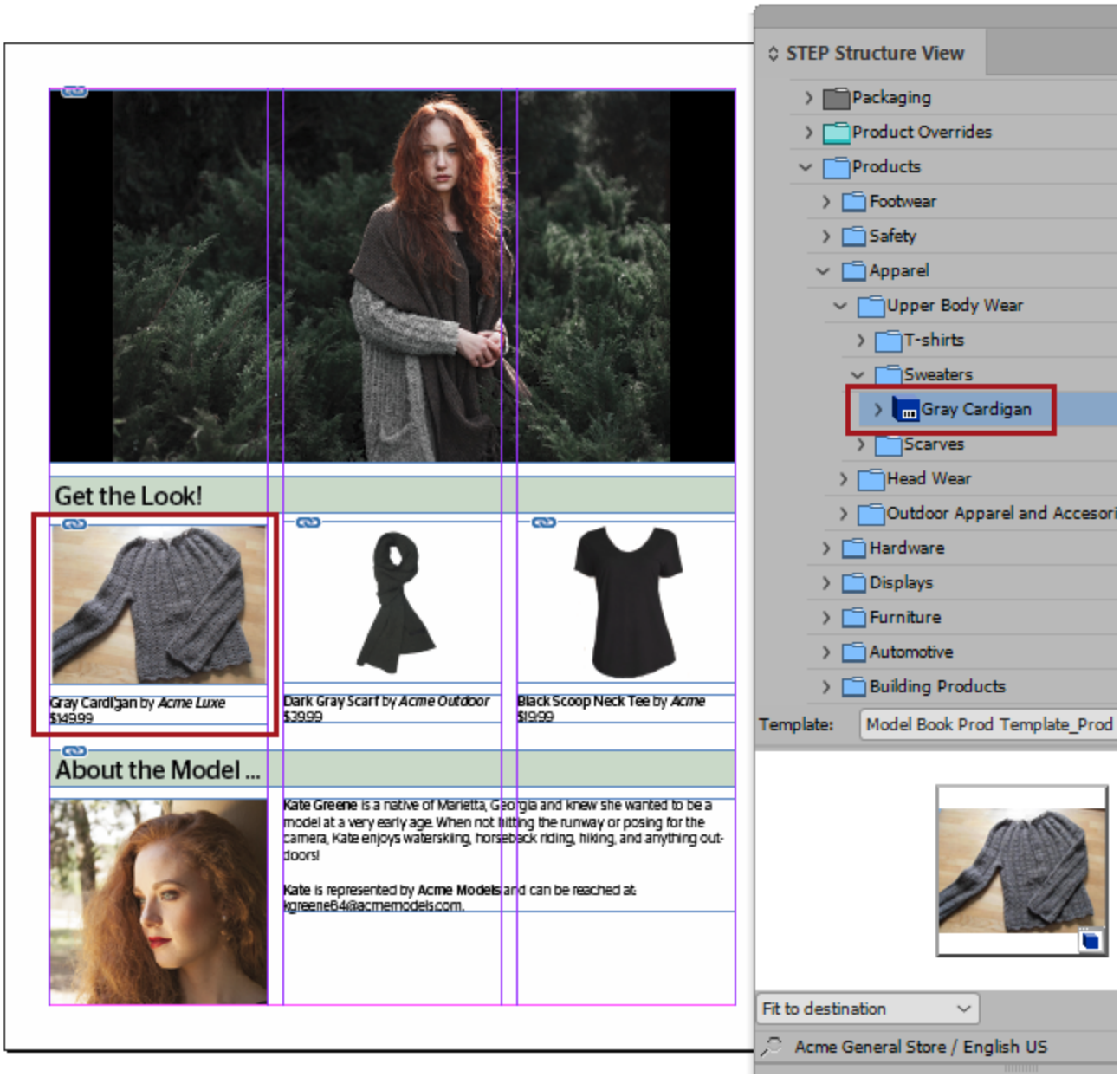
4. When the product is mounted, the textual and asset data from the referenced product (AA Batteries) appears on the page.

Mounting Entity References

The process for mounting content from referenced **entity** objects is basically identical to that of mounting information from a referenced product object, except that an entity reference is chosen from the Data Source dropdown on the STEP Template Frame panel.



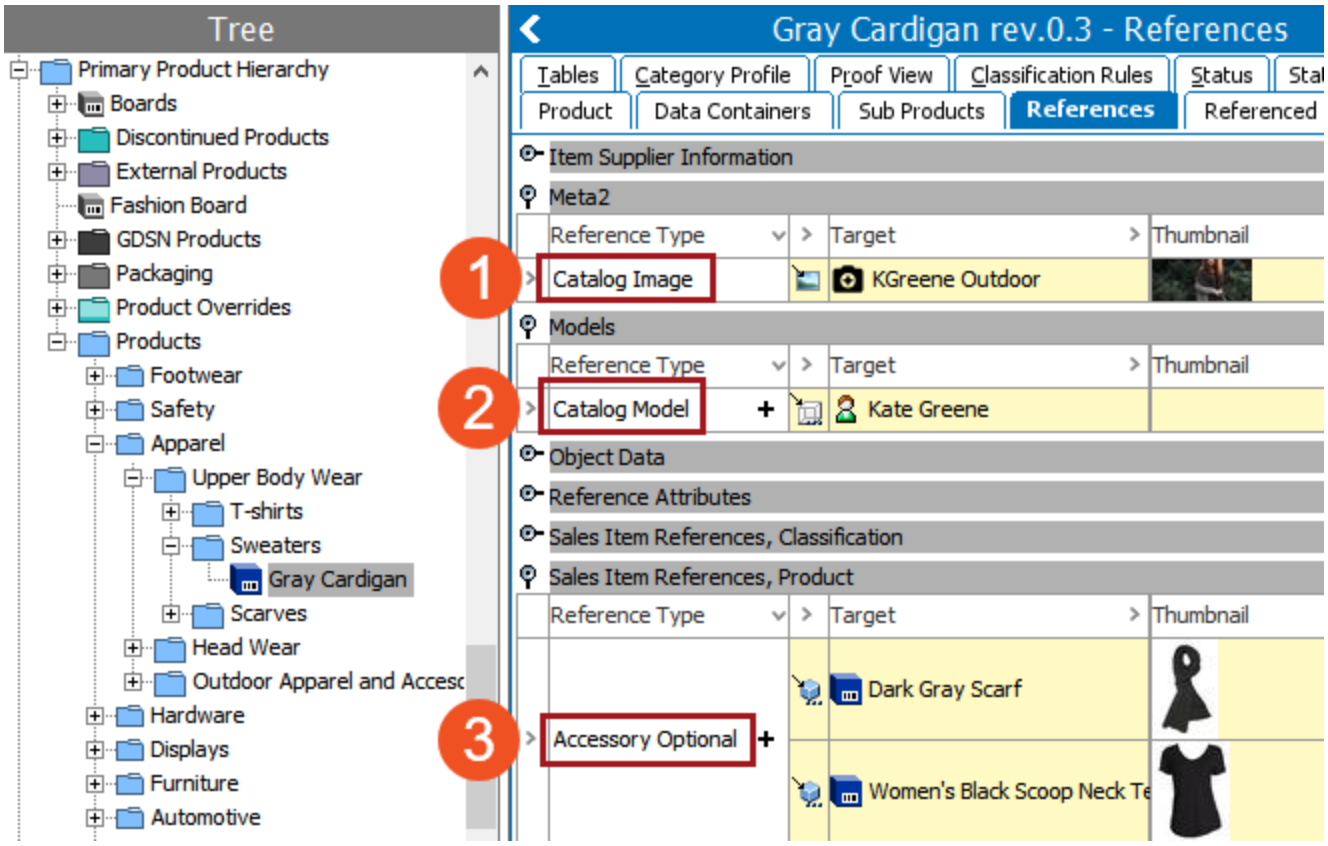
In the following example, a product has been mounted along with a referenced entity, two referenced accessory products, and a referenced asset (in addition to the primary image mounted directly with the product presentation, as highlighted in the red frame below). The mounted product is named 'Gray Cardigan.'

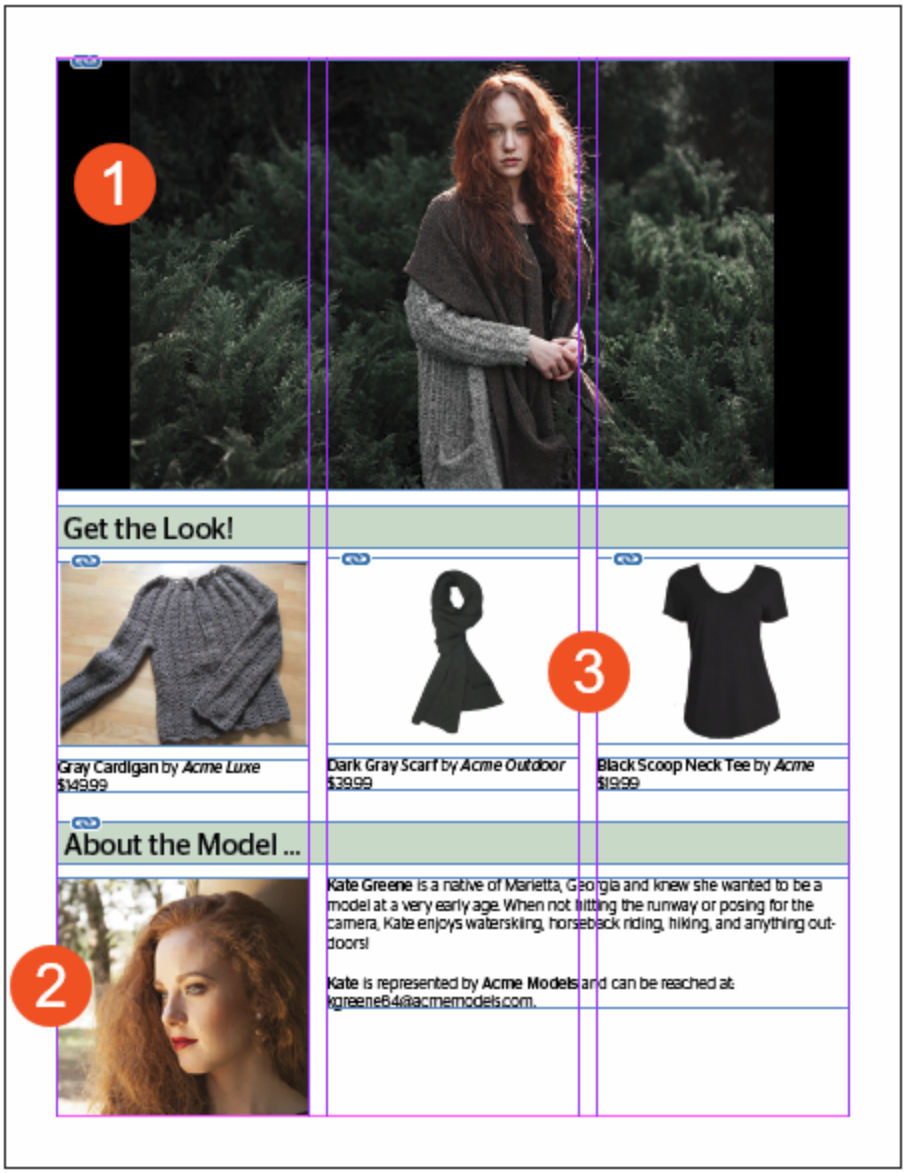


The mounted references are as follows:

1. **Asset reference:** Catalog Image
2. **Entity Reference:** Catalog Model
3. **Product References**: Accessory Optional

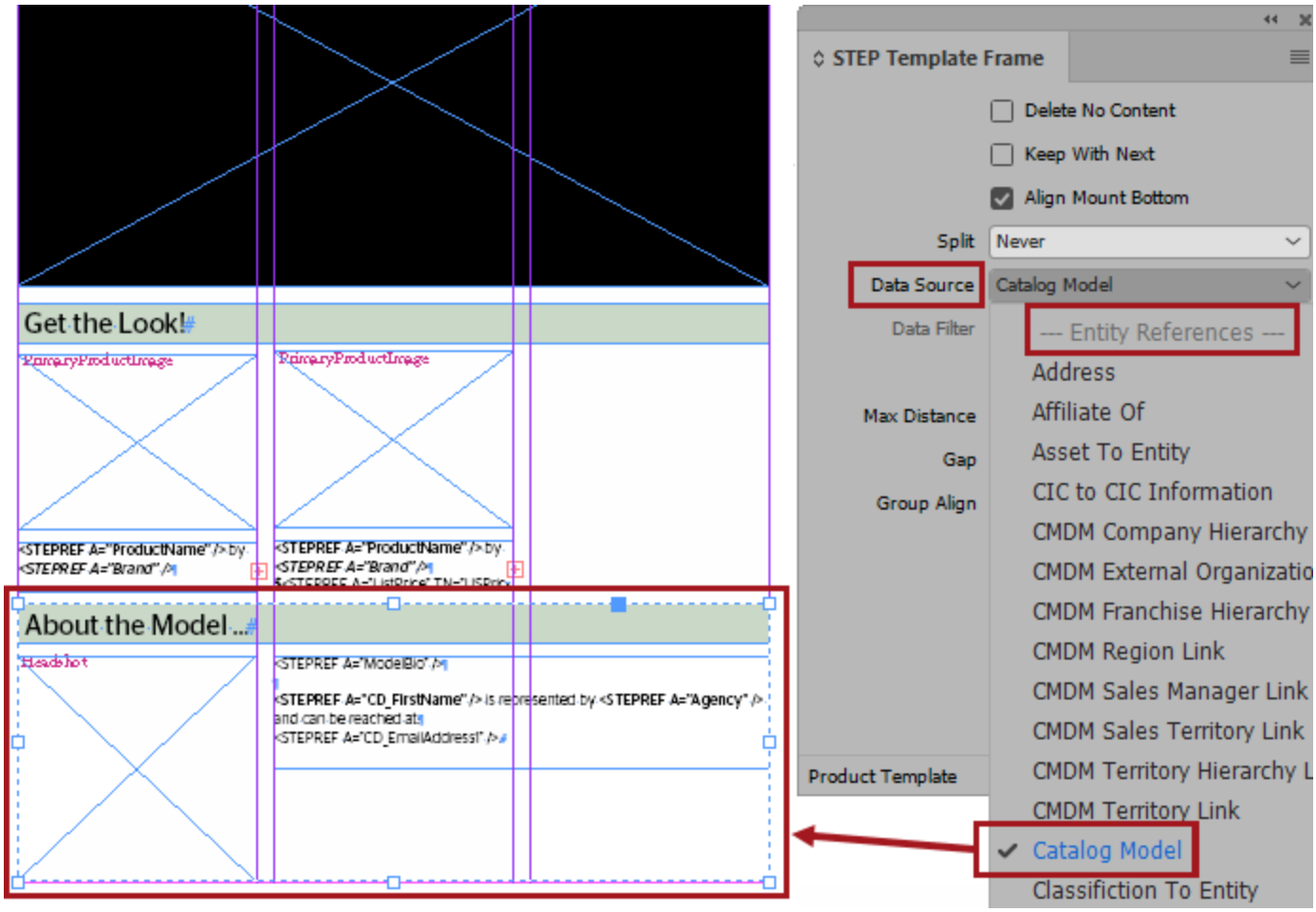
(The numbers in the list above correspond with the numbers in the screenshots below.)


Tree
Primary Product Hierarchy
Boards
Discontinued Products
External Products
Fashion Board
GDSN Products
Packaging
Product Overrides
Products
Footwear
Safety
Apparel
Upper Body Wear
T-shirts
Sweaters
Gray Cardigan
Scarves
Head Wear
Outdoor Apparel and Accesc
Hardware
Displays
Furniture
Automotive
Gray Cardigan rev.0.3 - References
Tables
Category Profile
Proof View
Classification Rules
Status
Product
Data Containers
Sub Products
References
Referenced
Item Supplier Information
Meta2
Reference Type
Target
Thumbnail
1
Catalog Image
KGreene Outdoor
Models
Reference Type
Target
Thumbnail
2
Catalog Model
Kate Greene
Object Data
Reference Attributes
Sales Item References, Classification
Sales Item References, Product
Reference Type
Target
Thumbnail
3
Accessory Optional
Dark Gray Scarf
Women's Black Scoop Neck Te

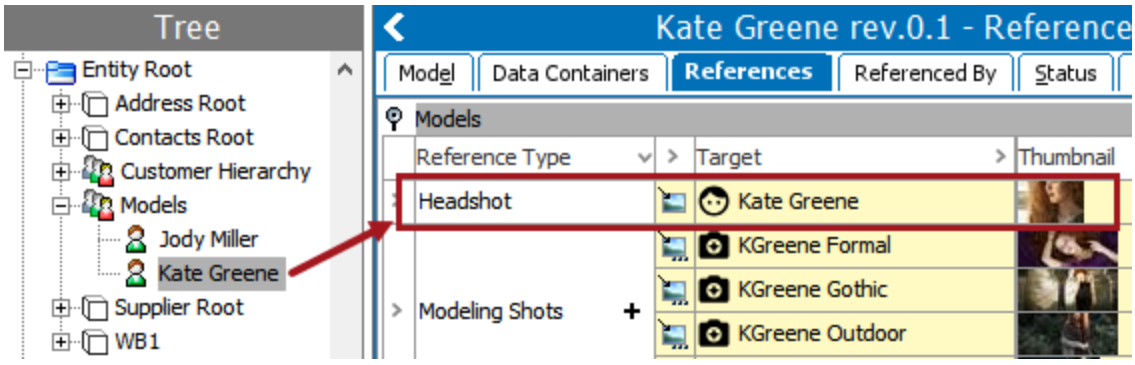


Product Template Configuration - Entity

In the following screenshot, the grouped frames at the bottom of the Product Template are configured to mount an entity using the 'Catalog Model' entity reference type.



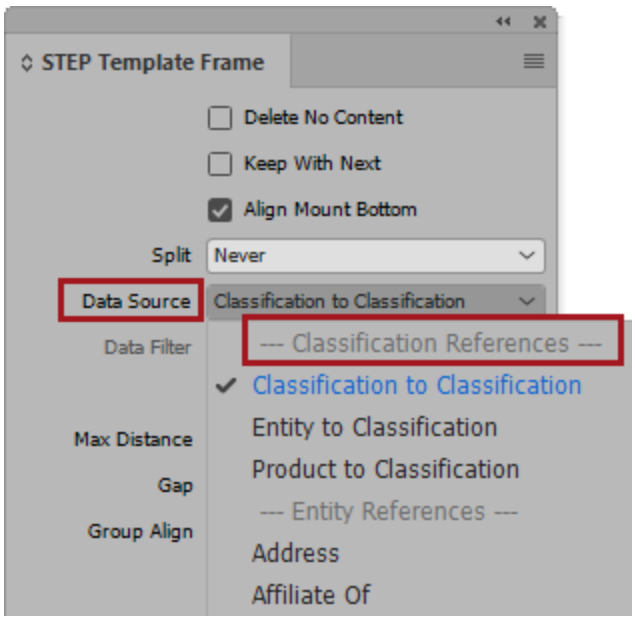
The **text** frame within the group is configured to pull in values from specified description attributes on the entity. The **asset** frame within the group is configured to pull in the 'Headshot' image referenced by the entity.



Mounting Classification References

The mounting of classification references is also supported in STEP Publisher. This includes support for Classification to Classification, Entity to Classification, and Product to Classification references. The product template setup required to mount classification references is identical to that of setting up a product template to

mount content from a referenced product, entity, or asset.



Attribute Transformations in STEP Publisher

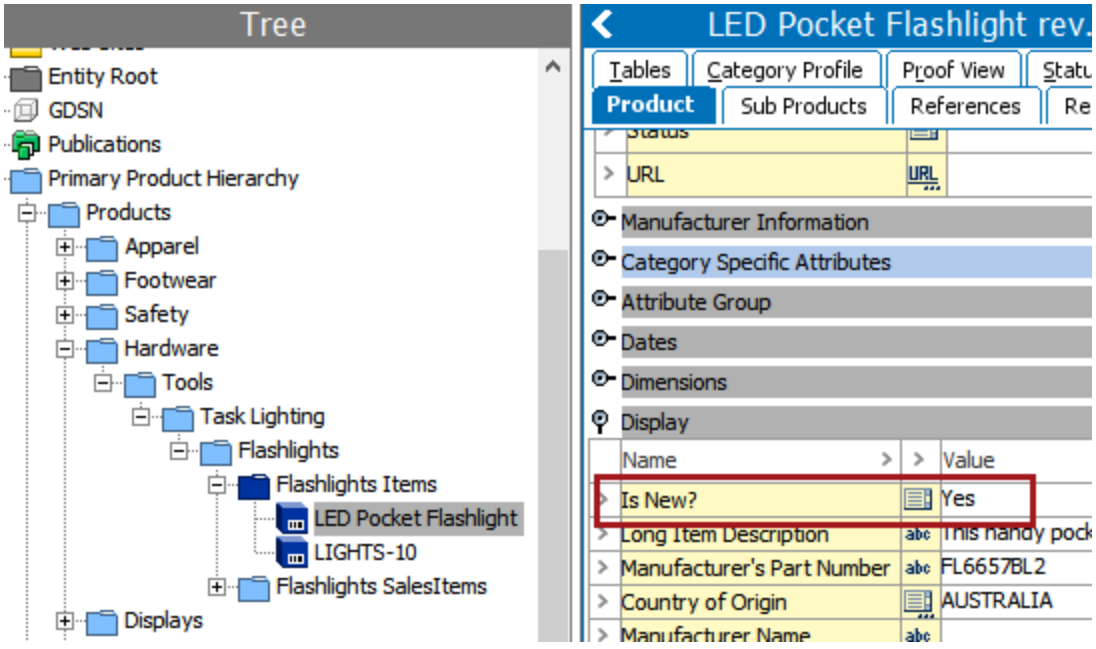
Attribute transformations are frequently used in STEP Publisher product templates to change the value of an attribute on a mounted InDesign page into another value, typically into another word or an image. Attribute transformations used with STEP Publisher are created in STEP in the same way as those used for other purposes. The difference for print is that these transformations must also be applied to attribute tags on the product template.

This topic does not describe, in depth, how to create attribute transformations in the STEP Workbench. It focuses on attribute transformations intended for InDesign pages. For more information on attribute transformations in general, see the **Attribute Transformations** topic in the **System Setup / Super User Guide** documentation.

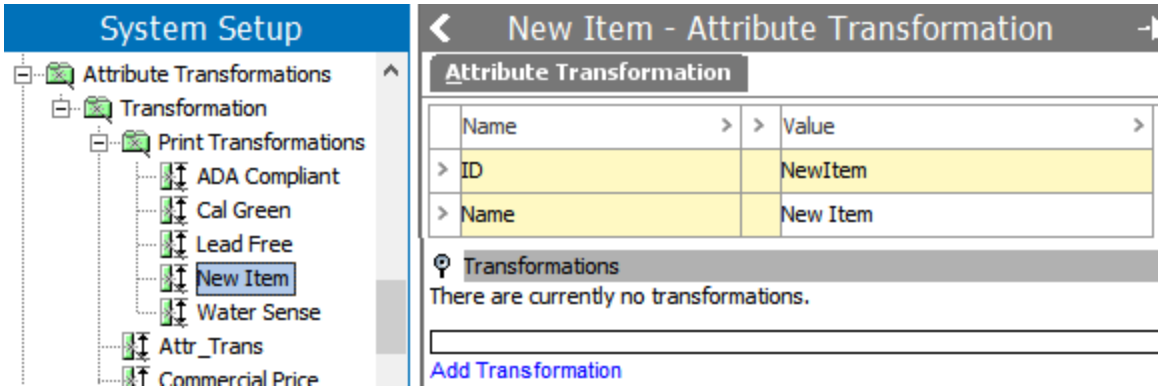
Using an Attribute Transformation to Transform Text in STEP Publisher

A common application for attribute transformations in InDesign is to transform a value of 'Yes' into another word. For example, an attribute could indicate whether a product is new or exclusive by having a value of either Yes or No. If the product is new, the value of 'Yes' is mounted on the page, then transformed into the word 'New!'.

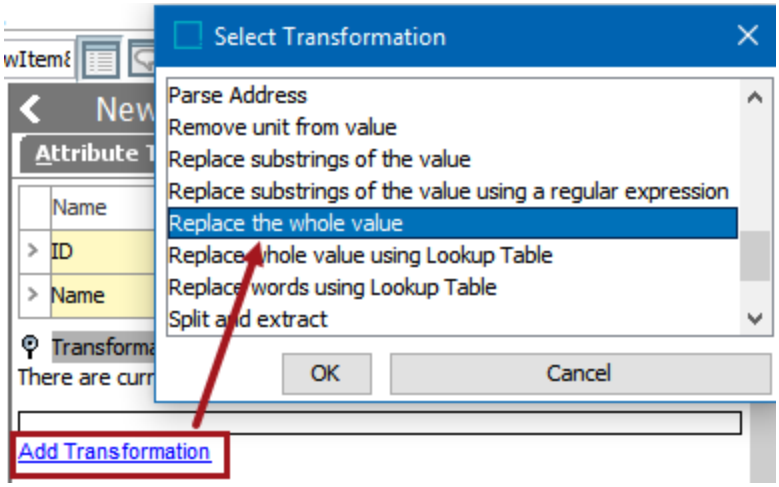
The following steps explain how to change an attribute value of 'Yes' into the word 'New!' on an InDesign page using an attribute transformation. The attribute used in this example is named 'Is New?'. This attribute has a validation base type of LOV and uses a Yes/No LOV. If the value is 'No,' then the value will be replaced with nothing, and the text frame will be automatically removed from the page. The removal will occur because the 'Delete no Content' parameter is applied to the text frame on the product template that contains the transformed attribute.



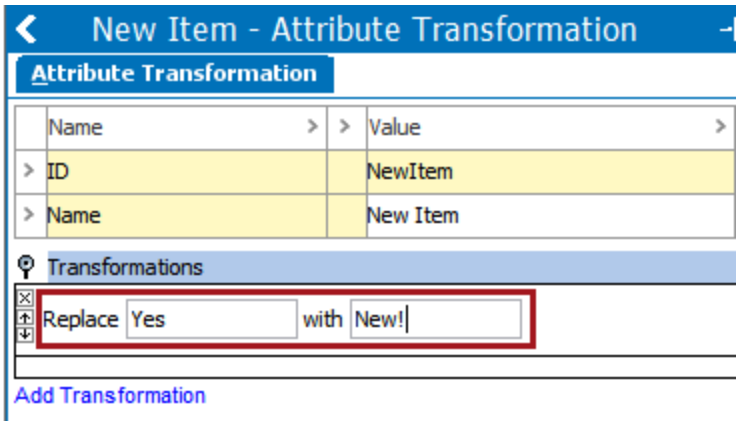
1. In System Setup, create an attribute transformation following the instructions outlined in the **Attribute Transformations** topic in the **System Setup** / **Super User Guide** documentation. In this example, the transformation has a STEP ID of 'NewItem' and a STEP name of 'New Item'.



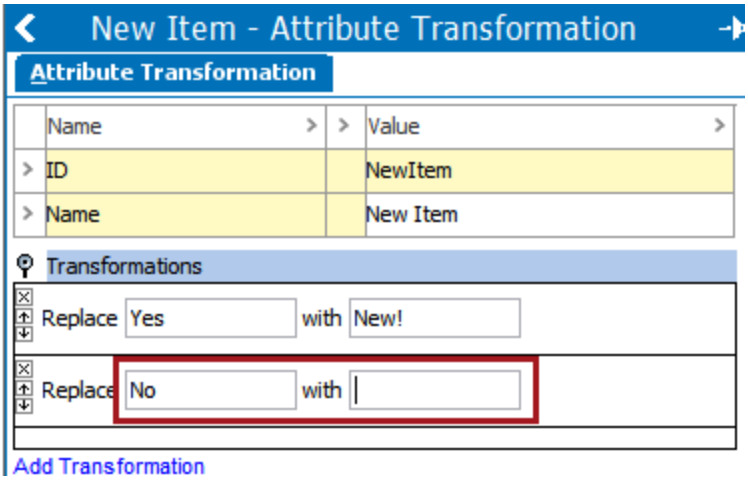
2. Click 'Add Transformation' to launch the **Select Transformation** dialog. In this example, the 'Replace the whole value' transformation is chosen. Click **OK**.



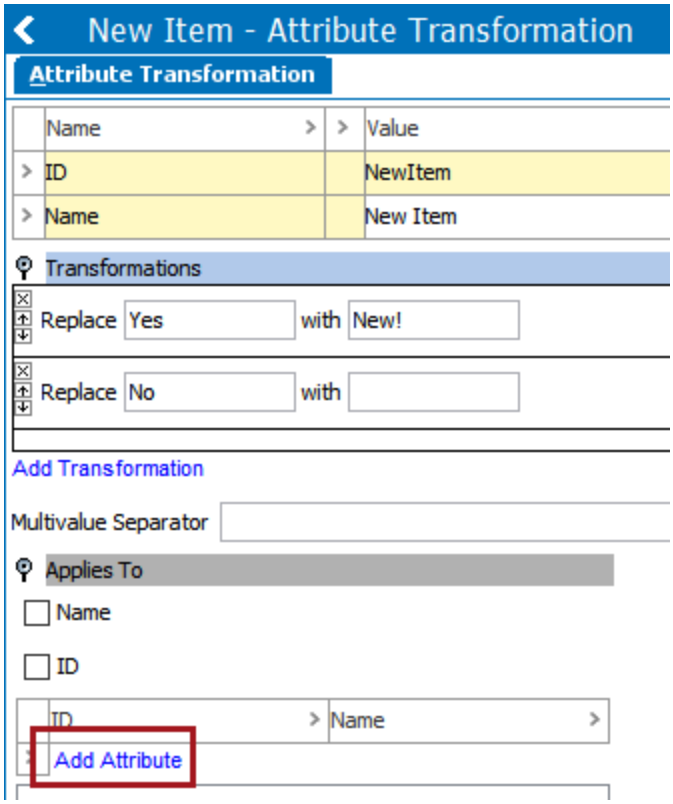
3. Type 'Yes' into the **Replace** field and 'New!' in the **with** field.



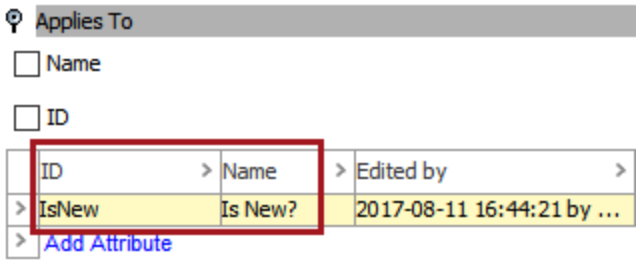
4. Click 'Add Transformation' again and choose 'Replace the whole value' again.
5. In the second transformation row that displays, type 'No' in the **Replace** field and delete the 'y' in the **with** field to leave the field blank.



6. Expand the 'Applies To' flipper and click **Add Attribute**.



7. Browse to or search for the relevant attribute in the 'Please Select Attribute' dialog, then click Select.
8. The transformation is now applied to the attribute.

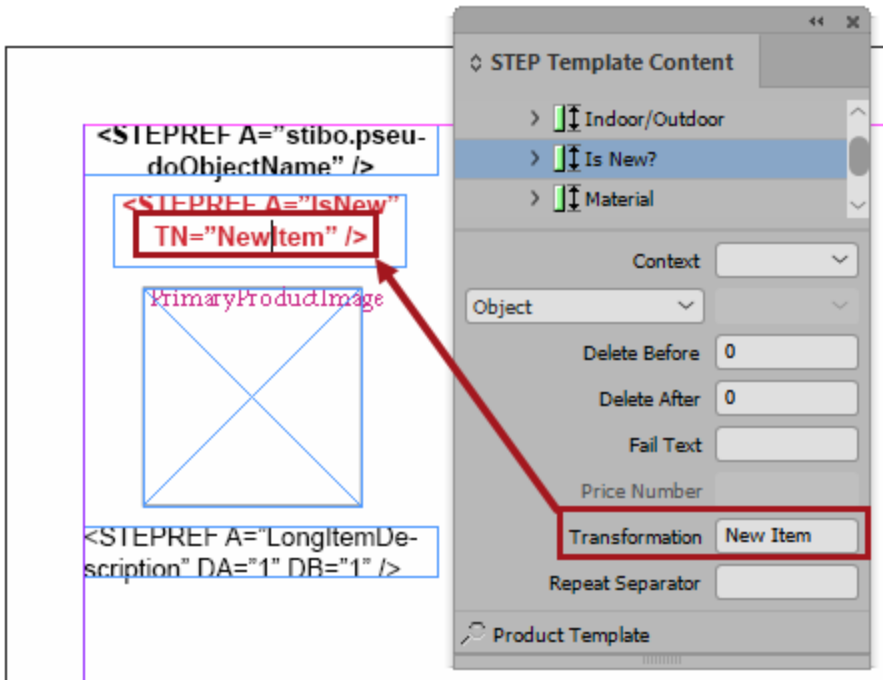


If you have an LOV with a large number of values that need to be transformed, recommended practice is to replace all the values using a **lookup table** instead of creating a separate transformation for each value. For more information, see the **Transformation Lookup Tables** topic in the **Resource Materials** online help.

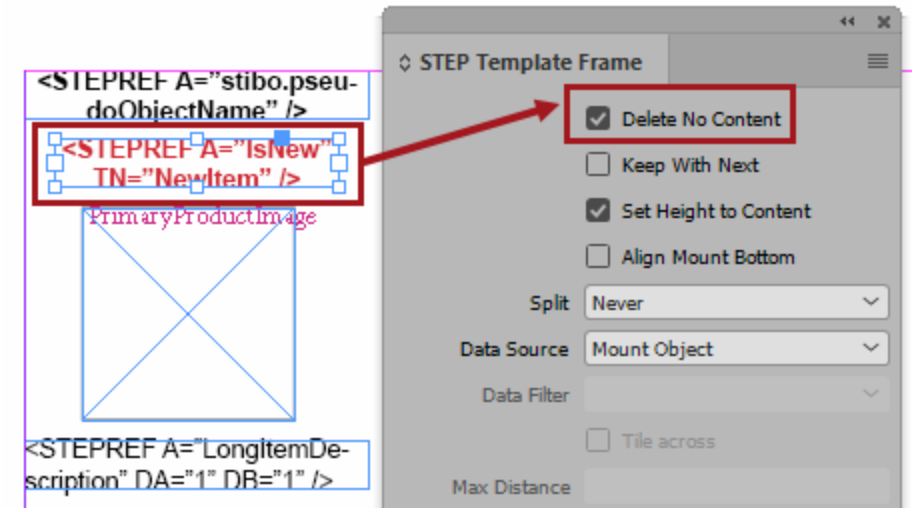
Applying the Transformation to the Product Template

The next step in getting the transformation to work on the mounted InDesign page is to apply the transformation to the relevant attribute tag on the product template. The following steps assume that you have already created a product template and that the STEP Template Content panel is open.

1. Create a frame on the product template containing the attribute that you applied your transformation to in the workbench. For this example, the attribute is 'Is New?' and the text has been styled bold red within the product template.
2. With your cursor inside the STEPREF tag, enter the **name** (*not* ID) of the relevant attribute transformation in the **Transformation** field on the STEP Template Content panel and then press Enter. The STEPREF tag on the product template will update with the **ID** (*not* name) of your attribute transformation, preceded by the letters TN=, as shown below:



3. To ensure that the text frame is removed from the page if the value is 'No,' apply the **Delete No Content** parameter to the frame using the STEP Template Frame panel. For more information on this parameter and panel, see the **STEP Template Frame** topic.



Testing the Transformation

To ensure that the transformation is working, mount a product using the product template to which you just applied the transformation. If the transformation has not been applied to the attribute correctly, either in STEP or on the product template, the untransformed value will display (in this example, either 'Yes' or 'No').

Testing the Yes Value

1. Locate a product object in STEP for which the 'Is New?' attribute is valid and make sure that the value of the attribute is 'Yes.'
2. Locate the object in the STEP Structure View in InDesign and drag it onto the publication template.
3. The word 'Yes' displays as 'New!'

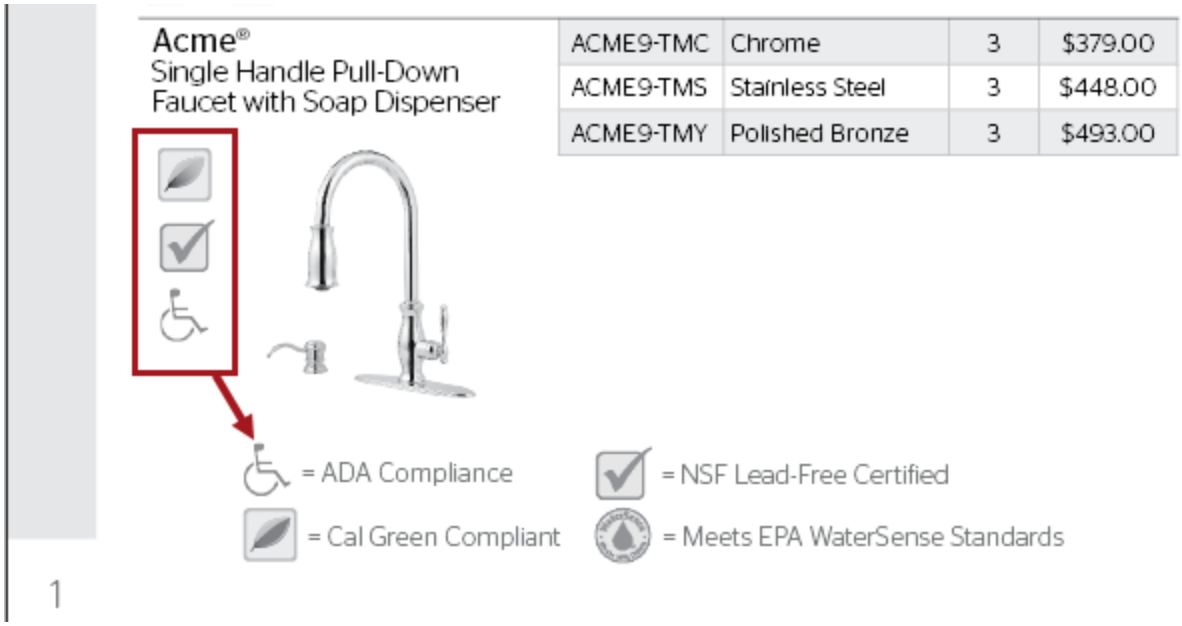
Testing the No Value

1. Locate a product object in STEP for which the 'Is New?' attribute is valid and make sure that the value of the attribute is 'No.'
2. Locate the object in the STEP Structure View in InDesign and drag it onto the publication template.
3. The frame containing the 'Is New?' attribute is removed from the page and no frame appears.

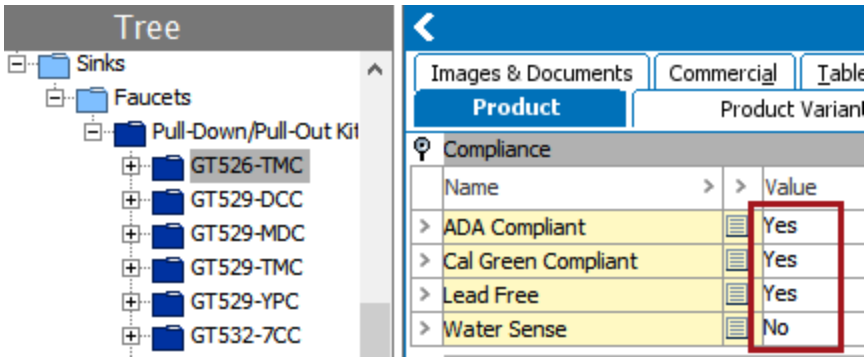
Using an Attribute Transformation to Transform Text Into an Image in InDesign

Another common application for attribute transformations in STEP Publisher is changing a value into an image. For example, an attribute with a Yes/No value could indicate whether a product meets certain criteria that would require an icon to display beside the product.

For this example, the fictional company Acme Faucets sells products that are expected to comply with certain industry and/or government certification standards. Icons appear on the page next to the products that meet these standards. Attributes with Yes/No values are used to control whether or not these icons display. The icons indicate whether the faucets meet the following compliance standards: ADA, Cal Green, NSF Lead-Free, and EPA WaterSense.

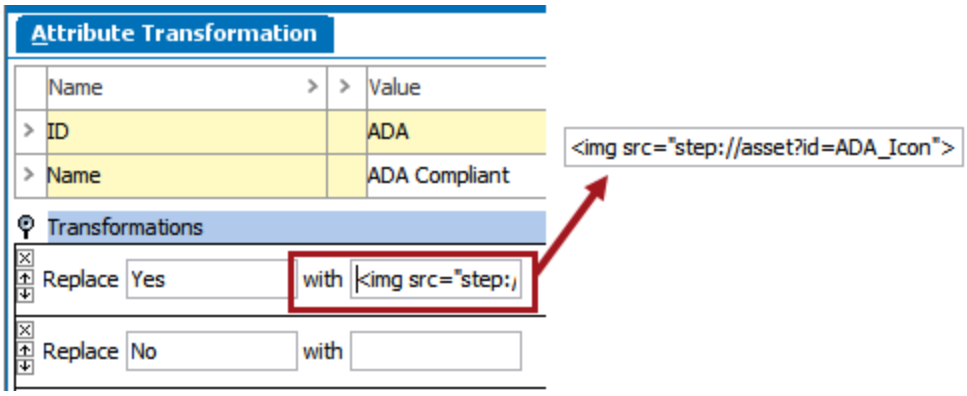


Instead of using image reference types to mount these icons onto the page, an attribute transformation changes the value of 'Yes' into the corresponding icon.

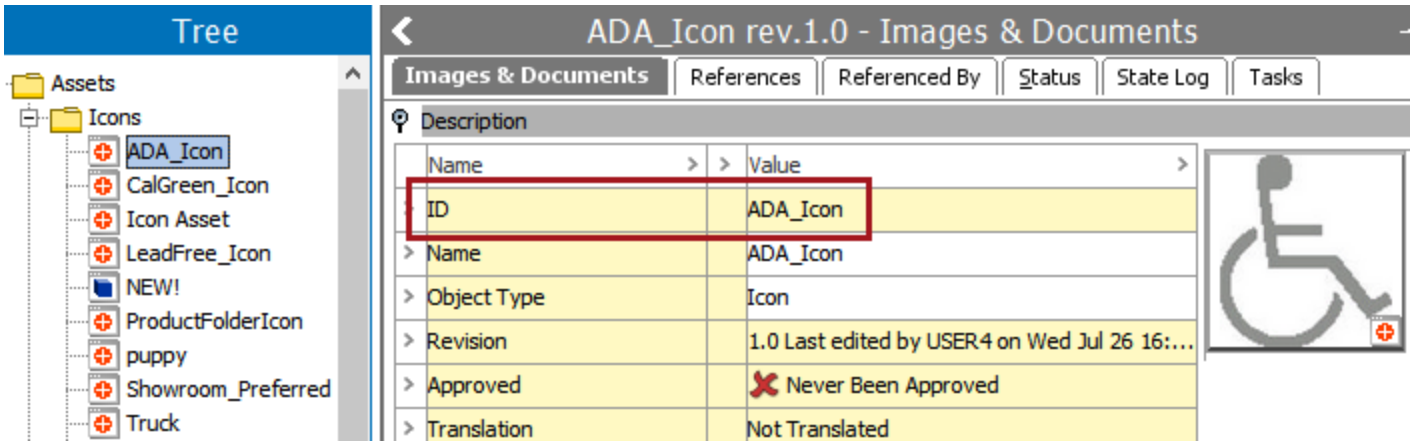


The method for transforming an attribute value of 'Yes' into an image on an InDesign page is nearly identical to that used to transform one value into another.

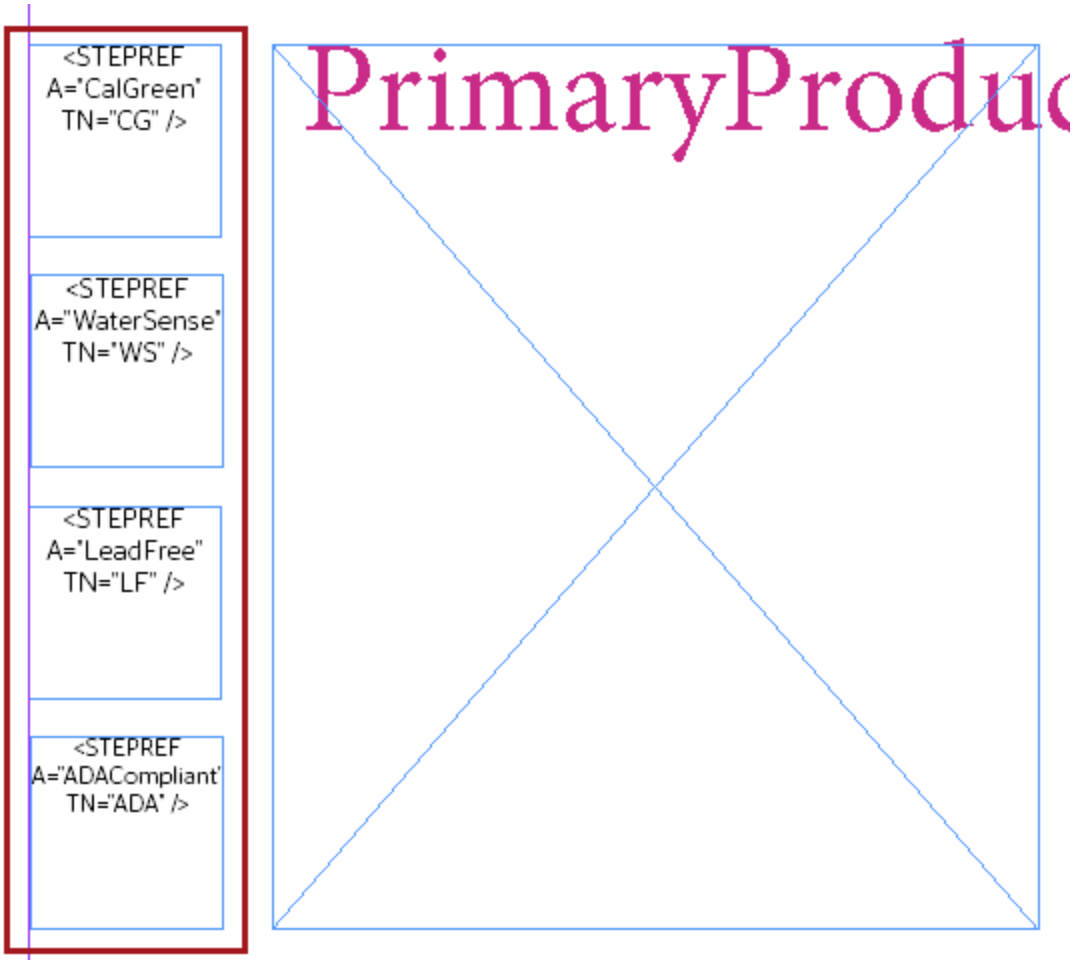
1. Follow steps 1 and 2 from the 'Using an Attribute Transformation to Transform Text in InDesign' section above to create the attribute transformation and apply the 'Replace the whole value' transformation. (Alternatively, you can also use the 'Replace Substrings of the Value' transformation, and using the substring transformation, you can have a mixture of text and one or more images in the same attribute as seen in the 'Example of multiple image tags in attributes' section below. See the **Replace Substrings of the Value Example** topic in the **Data Exchange** documentation.)
2. In the 'Yes' field of the transformation, enter a tag that references the ID of the image that should appear on the page. The following format is used: <img src="step://asset?id=**ADA_Icon**">.



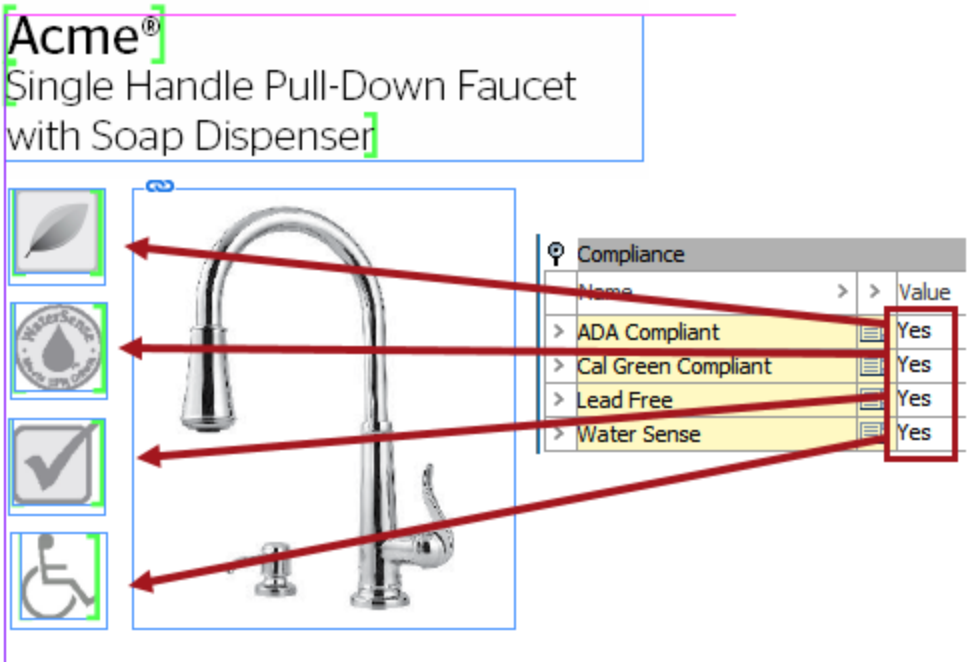
ADA_Icon is the ID of the image used in this example:



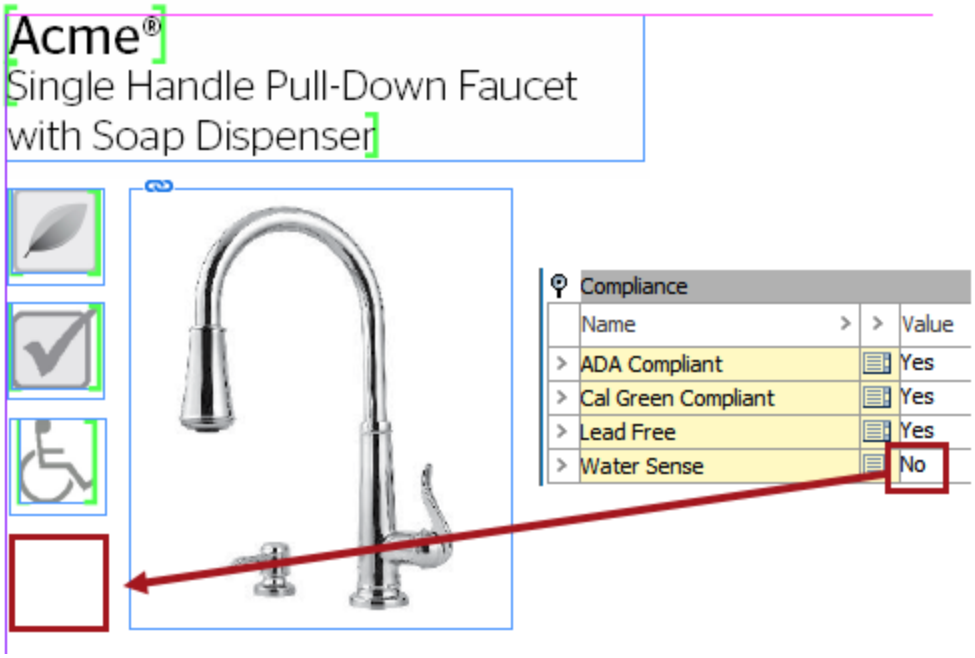
3. Apply the transformation(s) to the attribute(s) on the product template following the same method outlined in the 'Applying the Transformation to the Product Template' subsection above. For this example, the frames will look as follows. (All of the transformation tag text does not have to be visible in the frame; the font size has been reduced for this image to display the full text for illustration purposes.)



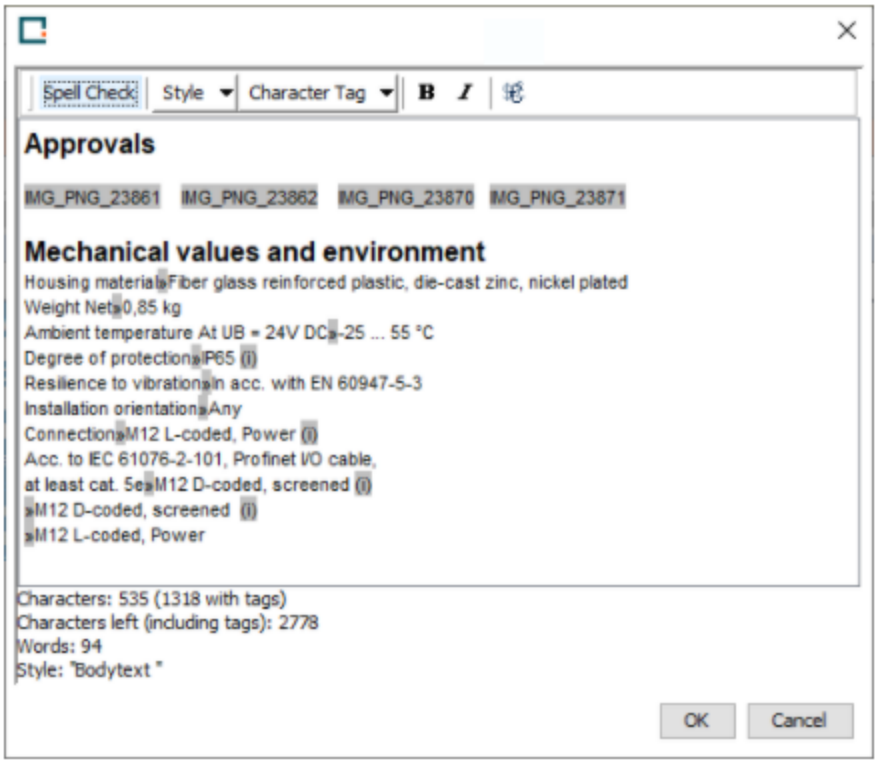
4. For the attributes whose values equal 'Yes,' the corresponding icon will mount in the frame. Since the text used in the attribute frames is centered and top-aligned, so are the icons.



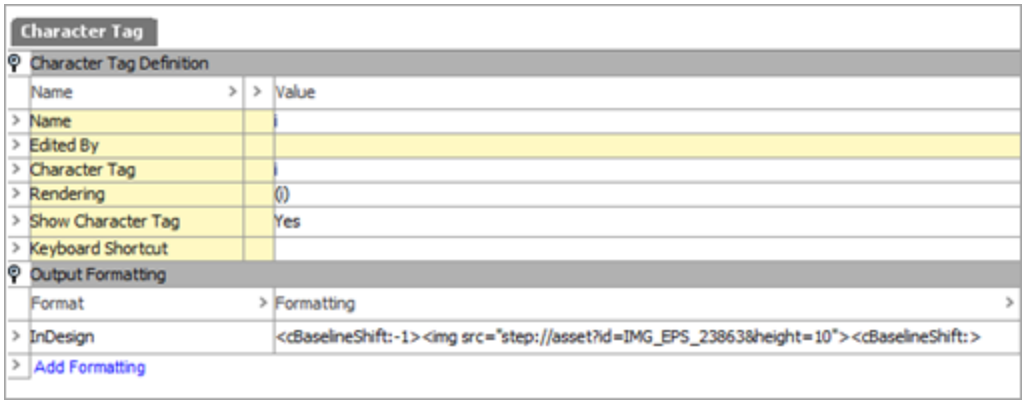
5. If the attribute value is 'No,' the icon will not mount and the frame will be removed from the page. This requires applying the 'Delete No Content' parameter to the text frame, as detailed in the 'Applying the Transformation to the Product Template' subsection above.



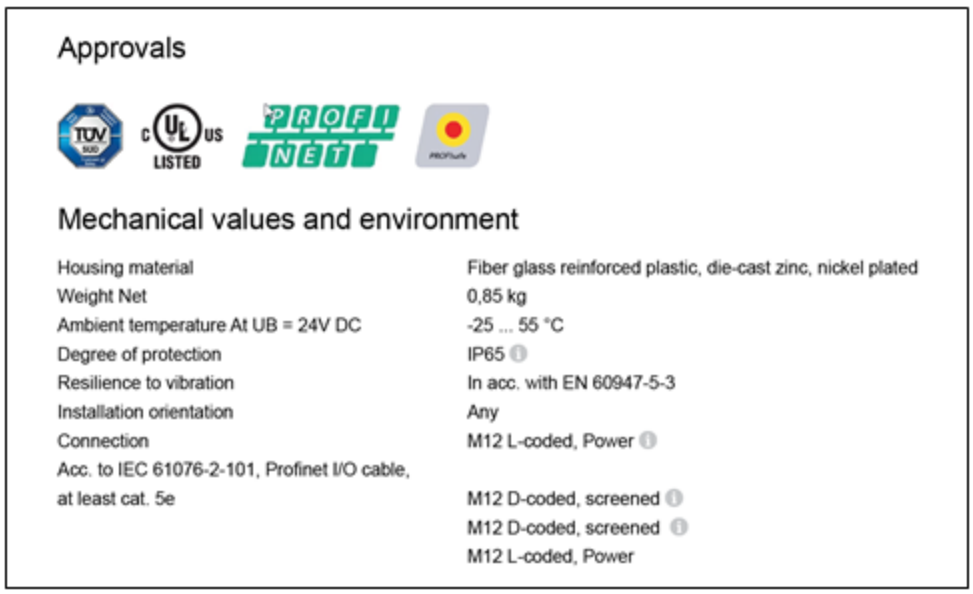
Example of multiple image tags in attributes



The images could either be maintained as an Inline Reference, resolving the ID of an asset defined as a character tag, resolving a certain image.



The images are resolved in InDesign via attribute transformations.



Approvals

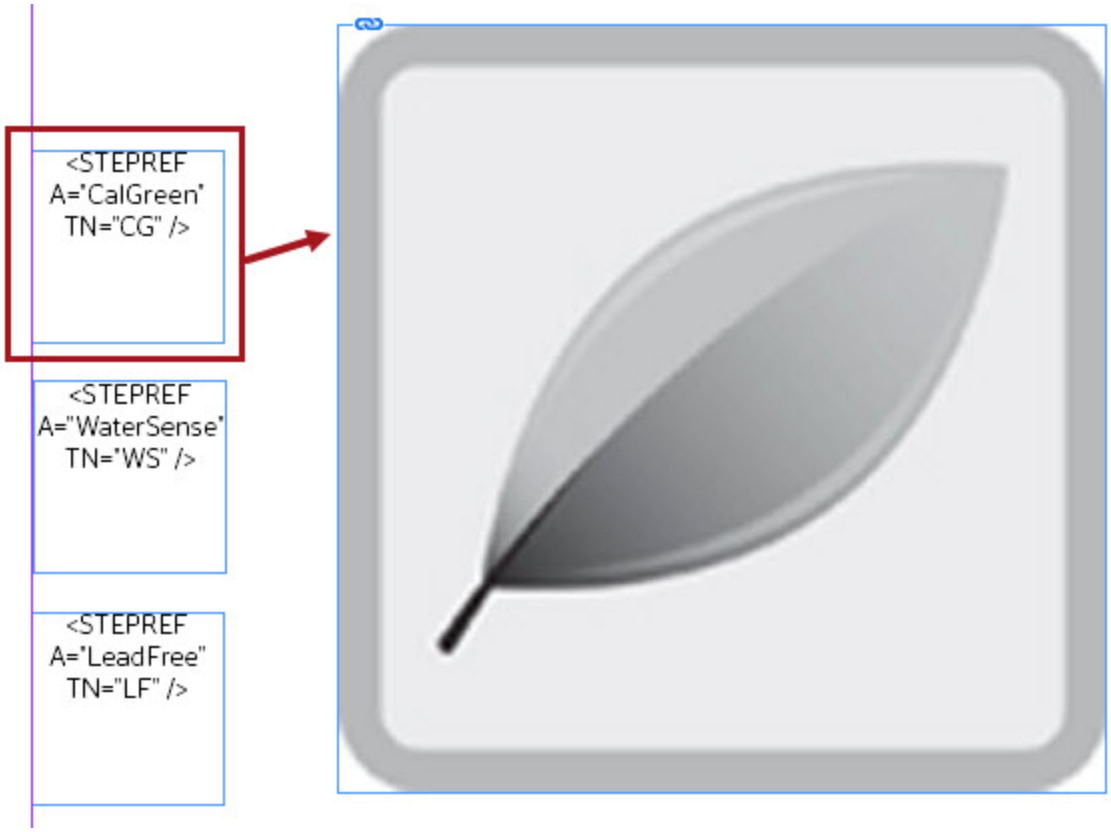
Mechanical values and environment

Housing material	Fiber glass reinforced plastic, die-cast zinc, nickel plated
Weight Net	0,85 kg
Ambient temperature At UB = 24V DC	-25 ... 55 °C
Degree of protection	IP65
Resilience to vibration	In acc. with EN 60947-5-3
Installation orientation	Any
Connection	M12 L-coded, Power
Acc. to IEC 61076-2-101, Profinet I/O cable, at least cat. 5e	M12 D-coded, screened
	M12 D-coded, screened
	M12 L-coded, Power

If you observe that any mounted attribute value using a 'text to image' attribute transformation shows as requiring update due. it may be due to different markings in the document (typical when upgrading from a lower version of STEP to 10.1 and above). Update the attribute via a Check DB Update or Update Document Data as a first step to resolving the issue.

Scaling images in transformations

Often, images used in a transformation may be larger than the frames into which the image will display. However, since these images appear in **text** frames instead of **image** frames, the scaling parameters available for image frames on the STEP Template Frame panel (e.g., 'Scale Asset to Frame') are unavailable.



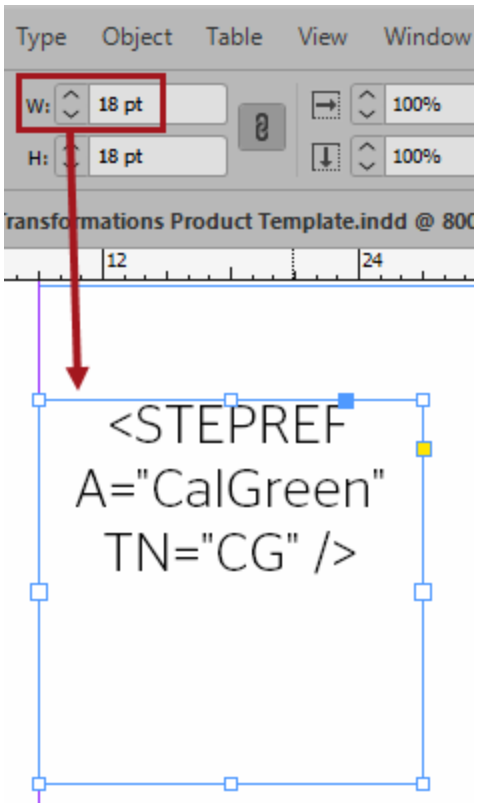
Though recommended practice is for the original image to be loaded into STEP at the actual size that is needed, actual-size images are not always available. If the image available in STEP is too large for the frame, the image can be resized within the transformation by adding a dimension value of either **width** or **height** to the end of the 'img src' transformation tag. The applied dimension is in **points**. For example:

<img src="step://asset?id=CalGreen_Icon_Large**&width=17**">

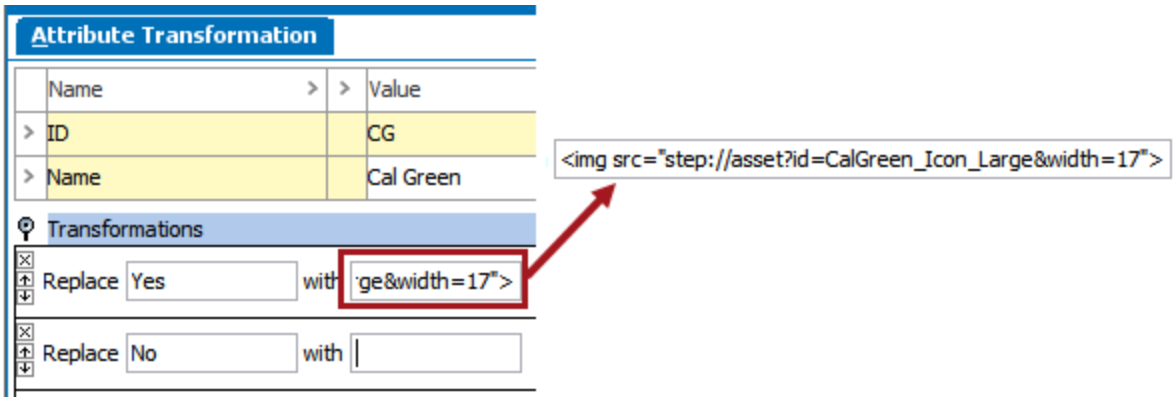
or <img src="step://asset?id=CalGreen_Icon_Large**&height=17**">

Note: The transformation tag will accept a value of width or height but not both. However, the image will be sized proportionately regardless of whether width or height is used.

Determine the width / height that you need by changing your measurements in InDesign to points, then selecting the frame.



In this example, the transformation makes the image 17 points wide to give it 1 point of padding inside the frame.



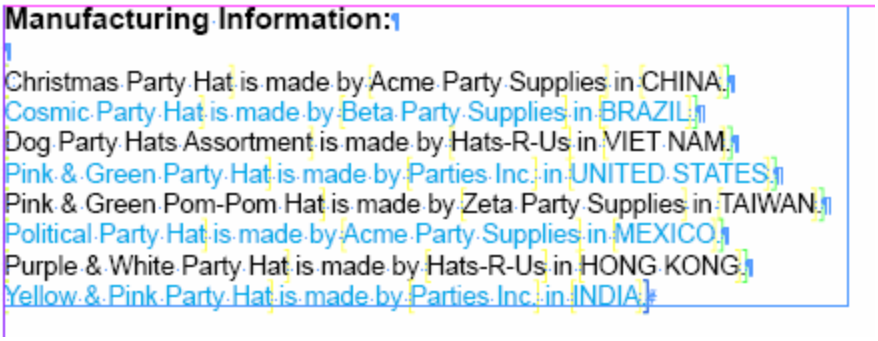
Once the attribute value is transformed, the image is 17 points wide and aligns with the frame identically to how the text was originally placed in the frame. I.e., if the text was centered and top-aligned, the image is as well.

Using Calculated Attributes to Transform Text Into an Image in InDesign

For scenarios on how to transform text into an image on an InDesign page using calculated attributes, see the **New Product Indicator Scenario** topic in the **Calculated Attribute Use Cases** documentation.

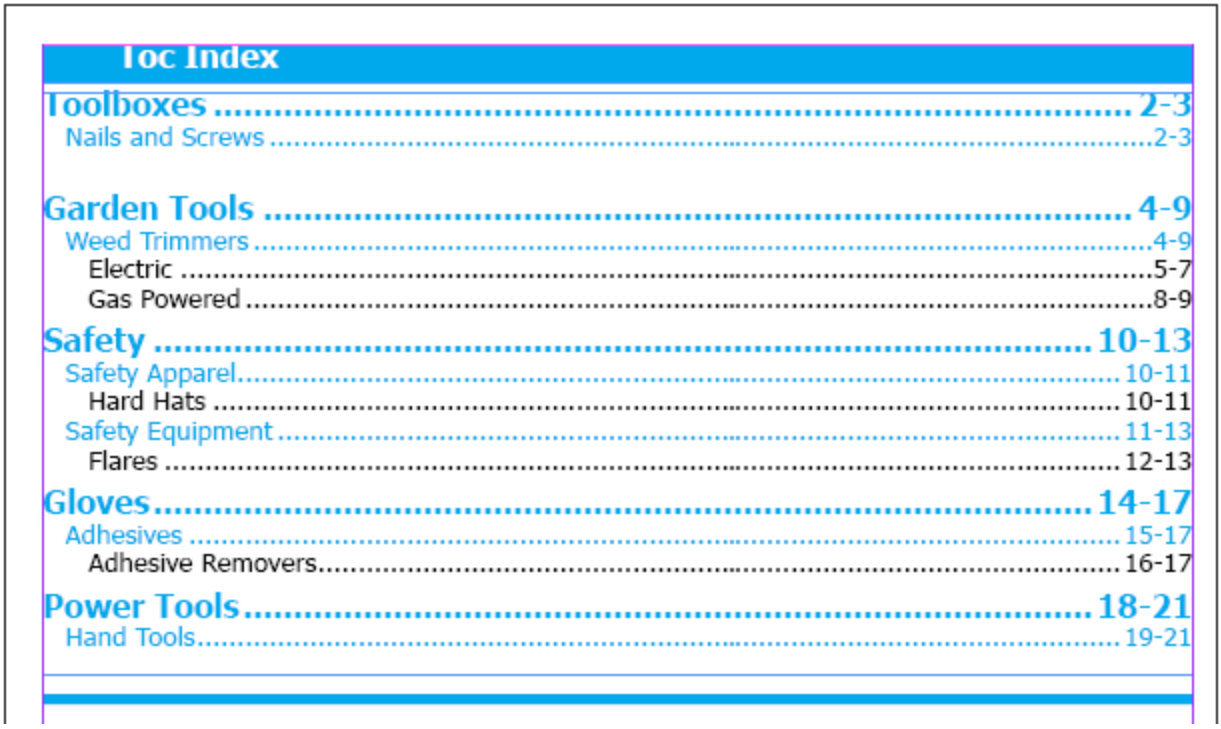
Using the Repeat Function for Subproducts

The STEP Publisher repeat function **STEPREPEAT** is used to mount attributes, asset references, tables, or any other values from child objects of a parent object by repeating the STEPXML tags for subproducts. For example, if mounting a product family, the repeat function STEPREPEAT is used to pull data that exists on the child products of the family. In addition to child product objects, this function can also be used to mount data from child objects within the classification structure or the publication structure.



As an alternative to creating a table in STEP, the STEPREPEAT function can repeat a range of attributes for the subproducts of the product being mounted. This can enable you to create a simple, table-like structure on your InDesign page where every subproduct has its own row. However, to make the data more closely resemble a table, additional formatting would need to be applied, and STEP tables provide more complex formatting options. For information on STEP tables, see the **Tables** documentation.

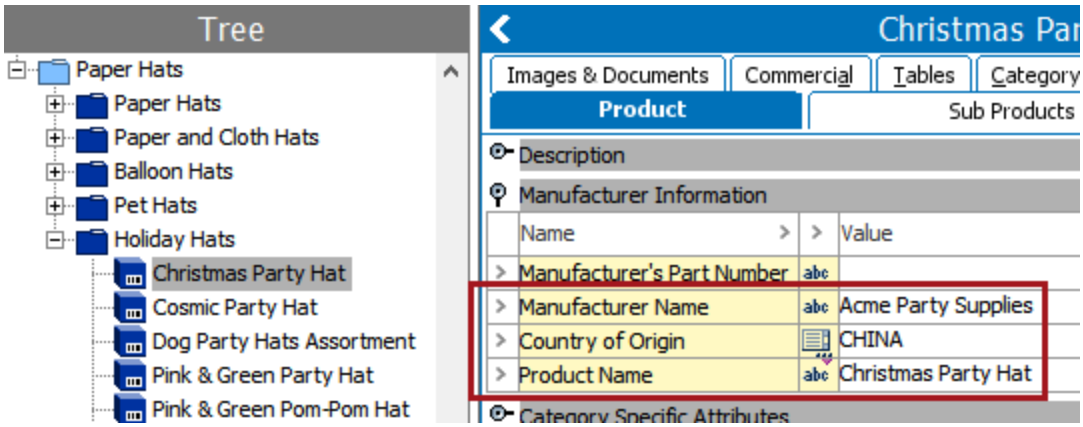
The STEPREPEAT function is also used to create tables of contents / section indexes, typically in AutoPage publications. For more information, see **Creating Tables of Contents in AutoPage** in the **AutoPage** documentation and **Creating a Table of Contents Product Template** in the **STEP Publisher** documentation.



Configuring the Product Template to use the Repeat Function

This topic assumes that a product template has already been created with a frame that contains the STEPXML tags for the attributes that should be mounted from the child objects. In this example, the original frame on the product template—before the repeat functionality is applied—looks like the following and contains free text values along with three attributes: 'ProductName,' 'ManufacturerName,' and 'CountryOfOrigin.'

The parent object that will be used in this example is 'Holiday Hats.' One of its child objects, 'Christmas Party Hat,' is pictured below in the STEP Workbench. The values for 'ProductName,' 'ManufacturerName,' and 'CountryOfOrigin' are outlined in red.



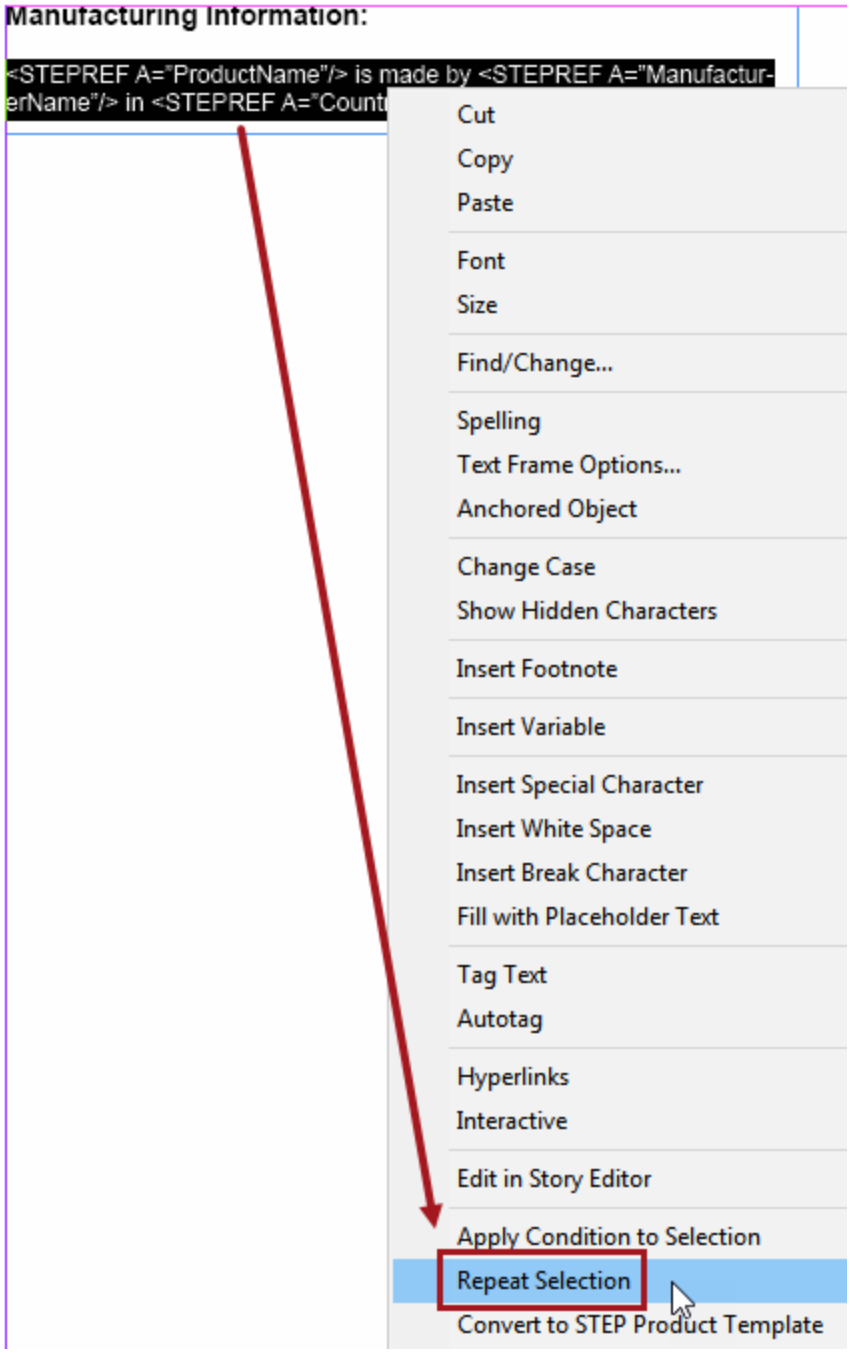
Before applying the repeat functionality to the template, and when only mounting a child product, the mounted page looks as follows. The goal of applying the STEPREPEAT functionality to the template will be to mount the same attribute data from the other child objects in the parent folder.

Manufacturing Information:

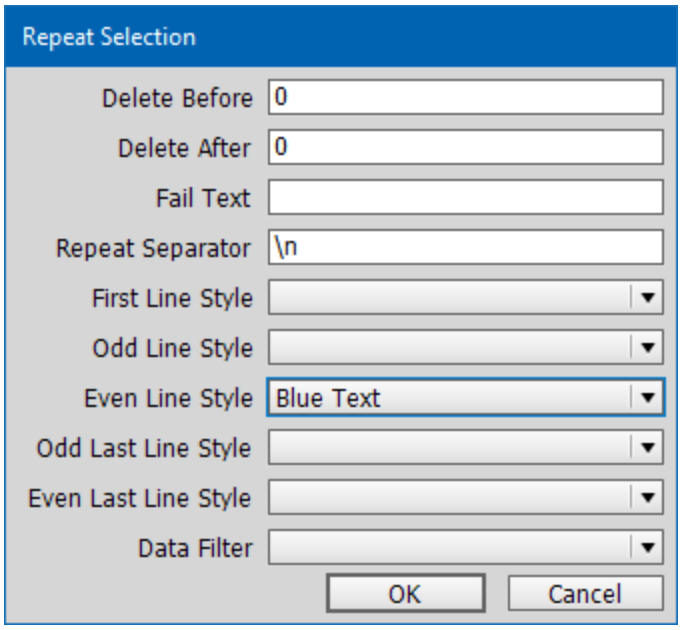
Christmas Party Hat is made by Acme Party Supplies in CHINA.

Applying the STEPREPEAT Function to Product Template Tags

1. On your product template, expand the InDesign text frame containing the STEP tag(s) that you would like to repeat.
2. Using the InDesign Text tool, select the XML tag(s) within the frame that you would like to repeat. One or more STEPXML tags can be selected.
3. With the tags selected, right-click and select **Repeat Selection**.

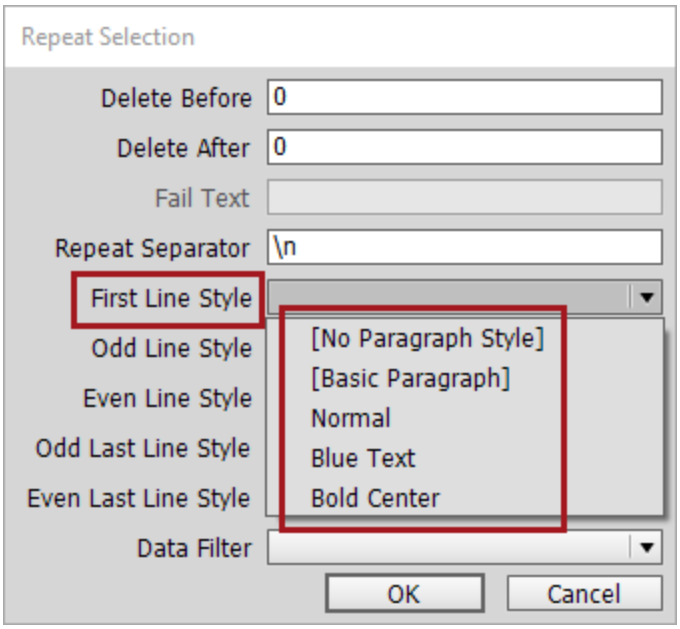


4. In the **Repeat Selection** dialog that displays, there are numerous options that can be configured to control how the repeated content appears on the page. Click **OK** when you have finished configuring your selections.

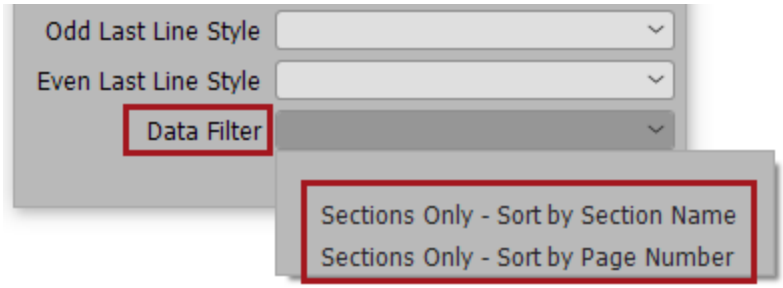


The options and their descriptions are as follows. For more information on the options that are identical to those present on the STEP Template Content panel, see the **STEP Template Content** topic.

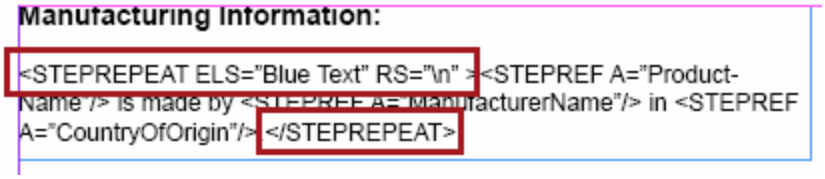
- **Delete Before + Delete After:** If a mounted attribute is empty, STEP'n'design can be configured to remove a number of characters either before or after the location where the attribute should have been placed. This setting is identical to the 'Delete Before' and 'Delete After' options that appear on the STEP Template Content panel.
- **Fail Text:** If an attribute does not contain a value for the product you are mounting, you can use this field to insert text that should appear on the page instead of a blank space or frame. This setting is identical to the Fail Text option that appears on the STEP Template Content panel.
- **Repeat Separator:** Enter the repeat separator string or character that will separate the repeated values ('rows') on the page. The most commonly used separators are **\n** (hard return), **\r** (soft return), and **\t** (tab), though the character can be as simple as a comma.
- **Line Styles:** Allows you to assign specific InDesign styles to the 'rows' in the 'table' created by the repeat function. Choose which InDesign **paragraph style** to apply to each 'line' of the repeated attribute values. These are not the same as *table* rule line settings. The styles in the line style dropdowns are populated by the InDesign paragraph styles present in the product template.



- **Data Filter:** Available options are **Sections Only - Sort by Section Name** and **Sections Only - Sort by Page Number**. Used when mounting publication or section objects to pull information (such as metadata attribute values or section names) from child sections / subsections. This functionality is used in publications (typically AutoPage) to create tables of contents / section indexes. See the **Creating a Table of Contents Product Template** topic for more information.



5. Once all options have been configured on the **Repeat Selection** dialog, the product template will resemble the following. The STEPREPEAT tag has been placed at the beginning and end of the selected tags. The paragraph style 'Blue Text' has been selected as the Even Line Style (ELS), and the hard return (\n) has been selected as the repeat separator (RS).

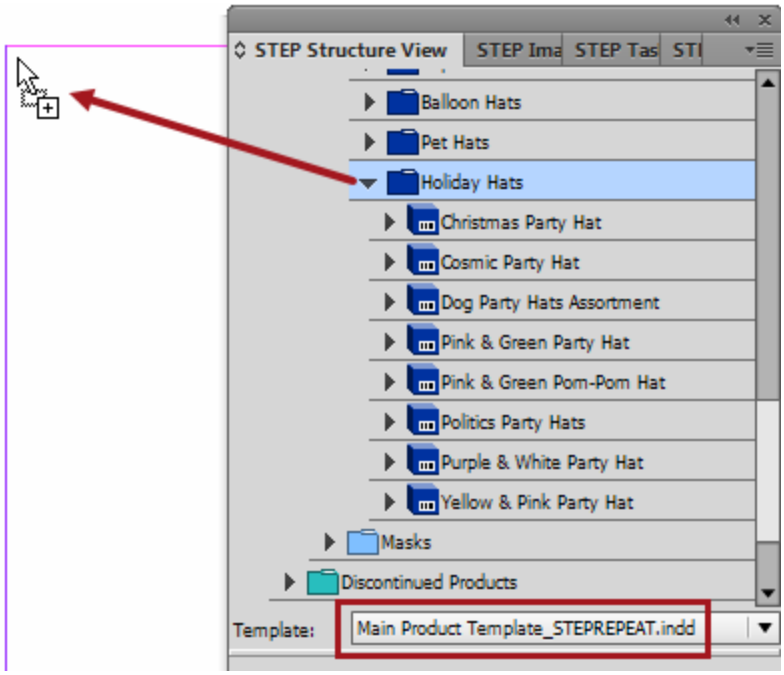


Mounting a Product Using the Repeat Function

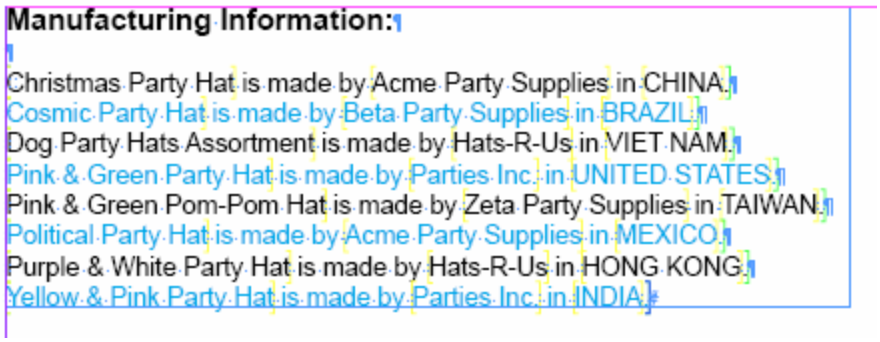
A *parent* product object will be mounted using the product template configured with the STEPREPEAT option.

The following steps assume that you have already selected the relevant product template from the **Template** dropdown menu in the **STEP Structure View** panel and that you have already located the product that you want to mount. Additionally, it assumes that you already have a publication template / mounting page created and configured.

1. Drag the parent product object onto the publication template / mounting page following the instructions outlined in the **Mounting Products** topic.



2. The attributes specified on the product template are mounted from each child product. In the below example, every other 'line' of text—the even lines—are mounted in blue text, and each line is separated by a hard return.

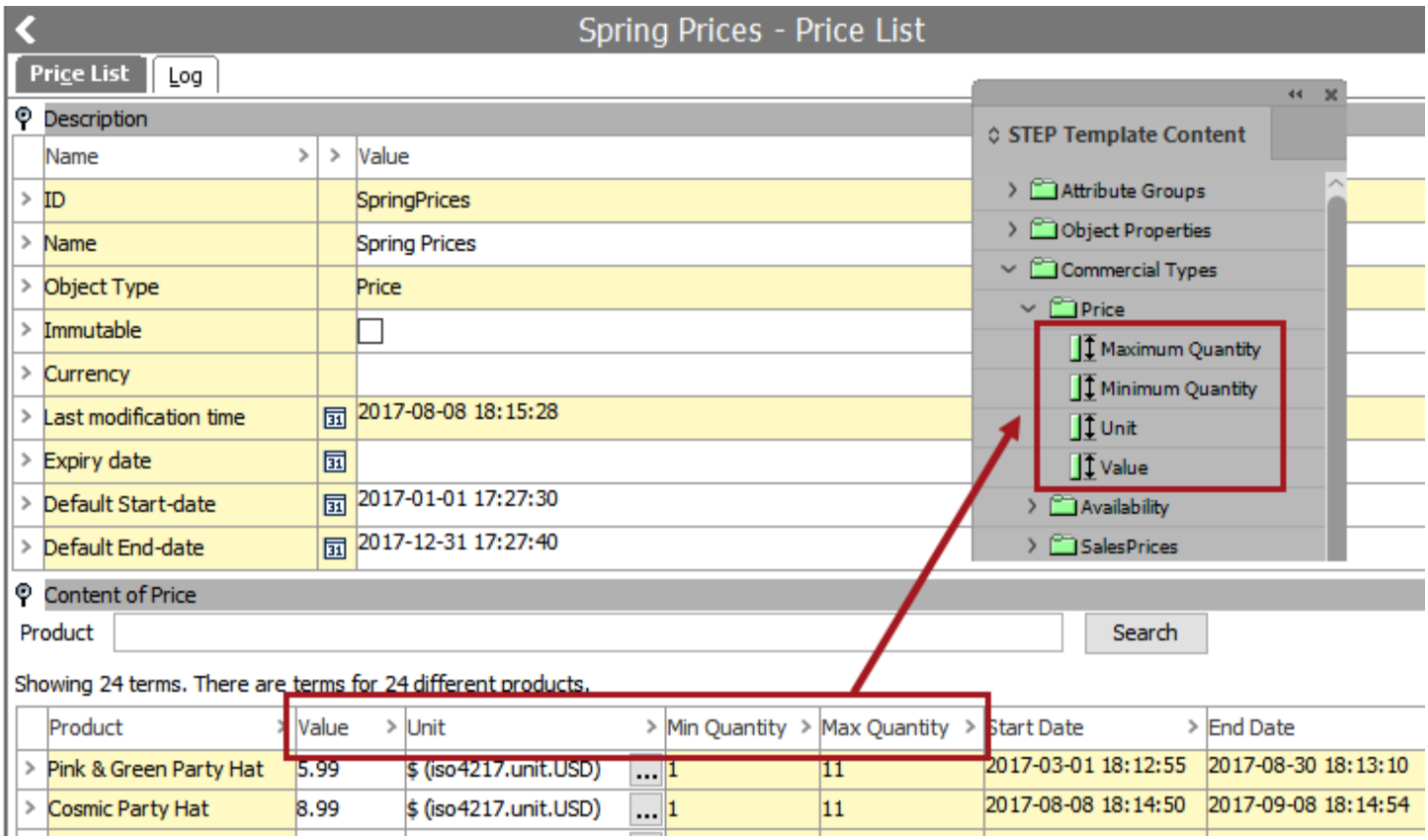


Mounting Commercial Data

This topic explains how to configure a product template to bring in commercial data values (terms) from STEP and mount these values onto InDesign pages.

There are two ways to mount commercial data onto an InDesign page—through a **product template** and through a **table**. This topic describes the product template method. For information on how to mount commercial data in tables, see the **Commercial Data Content Definitions** topic in the **Tables** documentation.

The following four aspects of a commercial data terms list can be mounted on an InDesign page: Maximum Quantity, Minimum Quantity, Unit, and Value.



Note: Though commercial terms lists also contain a Start Date and an End Date, these cannot be mounted using the aspects in the STEP Template Content panel. Additionally, the metadata 'Default Start-date' and 'Default End-date' attributes available on commercial lists also cannot be mounted. Dates must be mounted using another list that contains the date value within the **value** field.

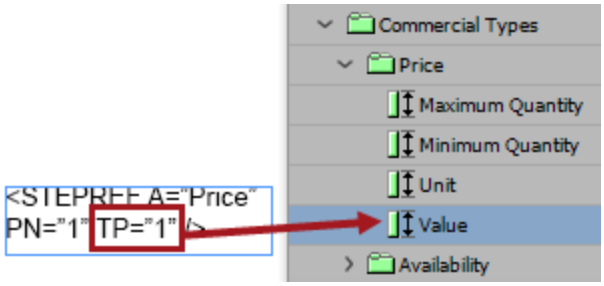
Incorporating Commercial Terms Into a Product Template

The method for placing commercial data aspect tags onto a product template from the STEP Template Content panel is identical to that of placing any other attribute tag onto a product template. See the **Text Frames in Product Templates** topic for more information on the steps for actually placing the information on the template.

The following screenshots explain how the different aspects of commercial data display on the product template. All commercial term tags are designated by **TP**, which means 'Commercial Term (Price) Property.'

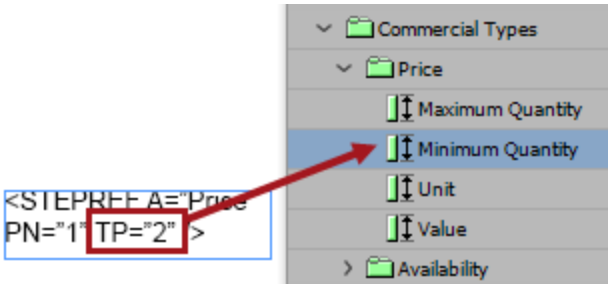
Value

The Value element appears on the product template as TP="1."



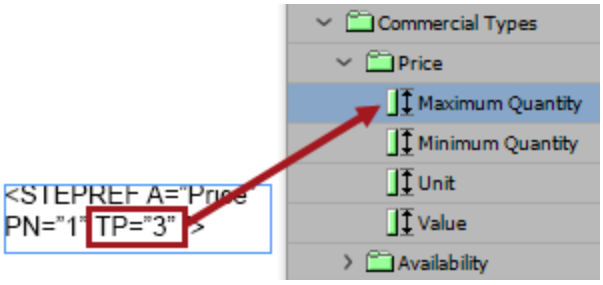
Minimum Quantity

The Minimum Quantity element appears on the product template as TP="2."



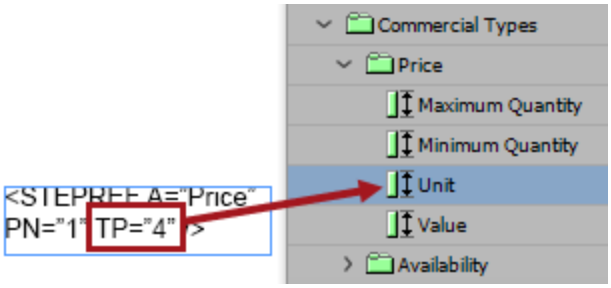
Maximum Quantity

The Maximum Quantity element appears on the product template as TP="3."



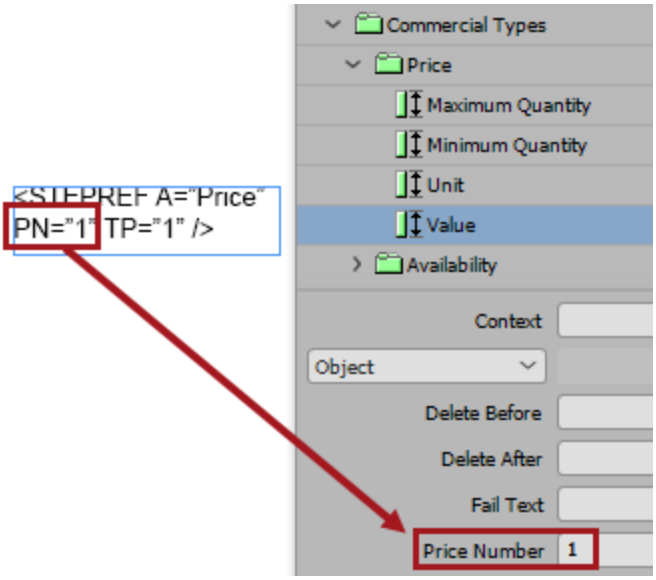
Unit

The Unit element appears on the product template as TP="4."

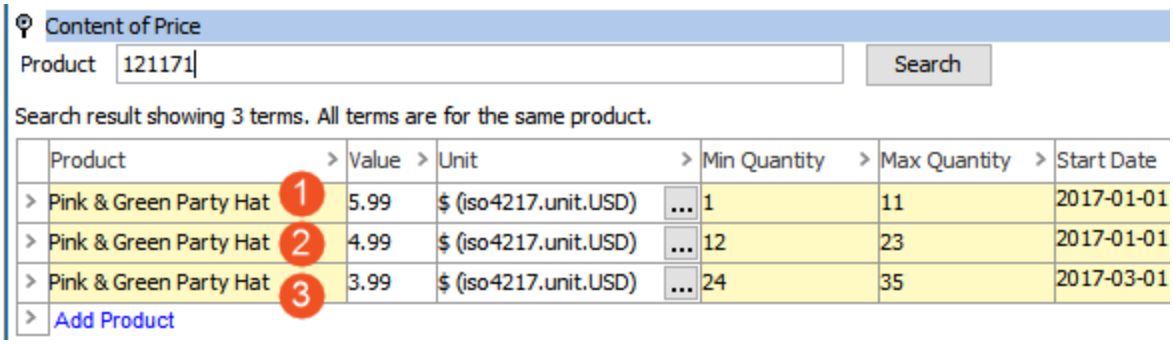


Price Number

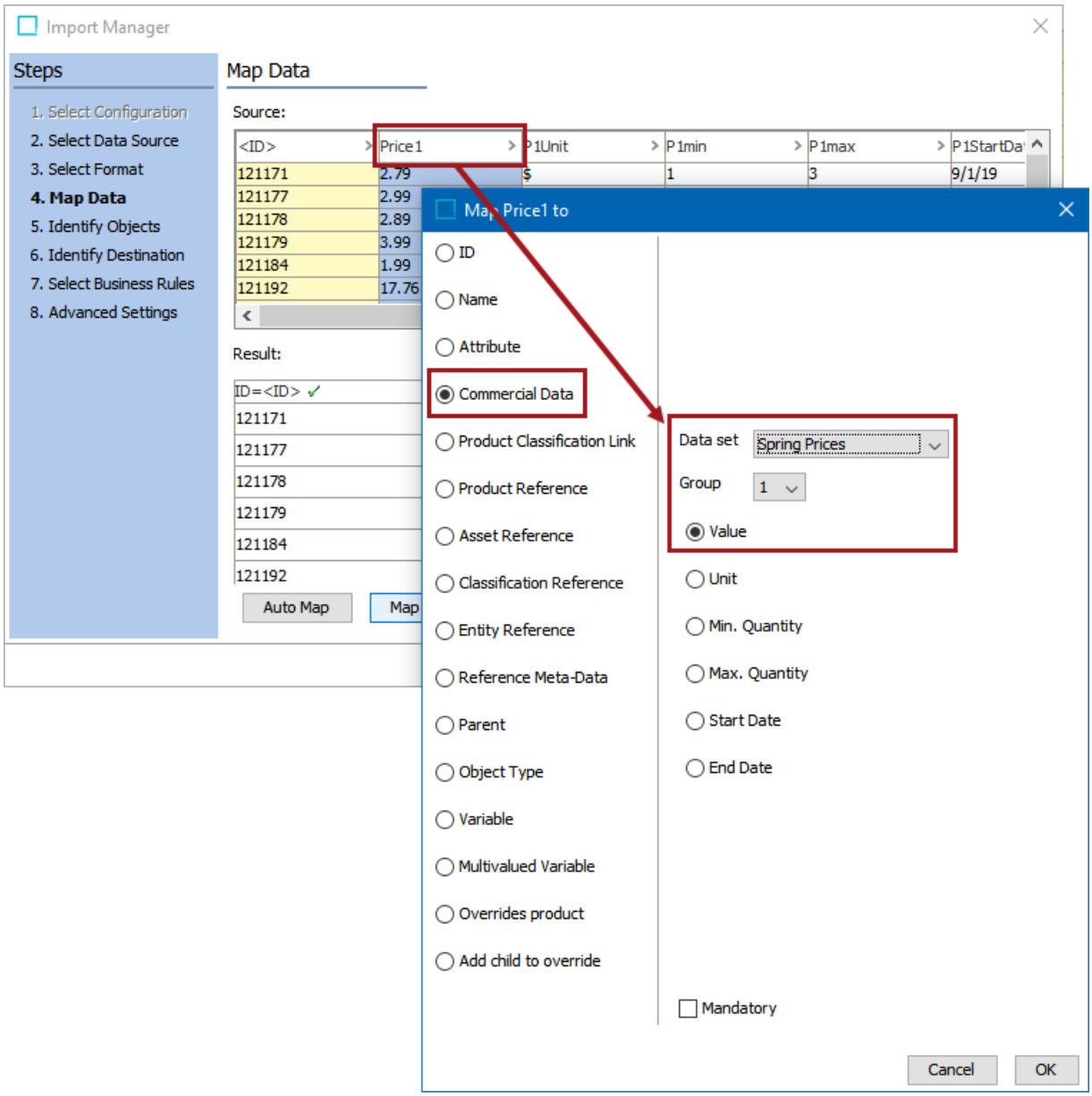
A Price Number (PN) must be designated for every commercial data tag.



The price number determines which price break is being referred to when there is more than one term for the same product on a single commercial terms list. Price number is the order in which the terms appear in the list. The below screenshot indicates Price Number 1, Price Number 2, and Price Number 3. Price numbers typically indicate price breaks; for example, price 1 will be the retail price, price 2 will be a discounted price for a larger quantity, price 3 will be an even lower price for an even larger quantity, and so forth.

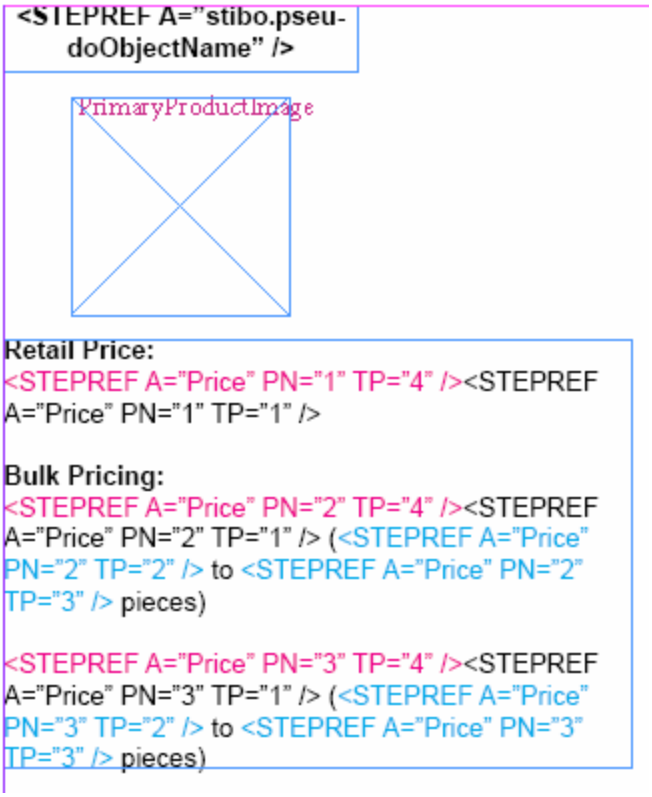


Price Number is also the same as the value chosen for **Group** when commercial data is imported. See the **Defining Import Settings for Commercial Data** topic in the **Commercial Data** documentation for more information.

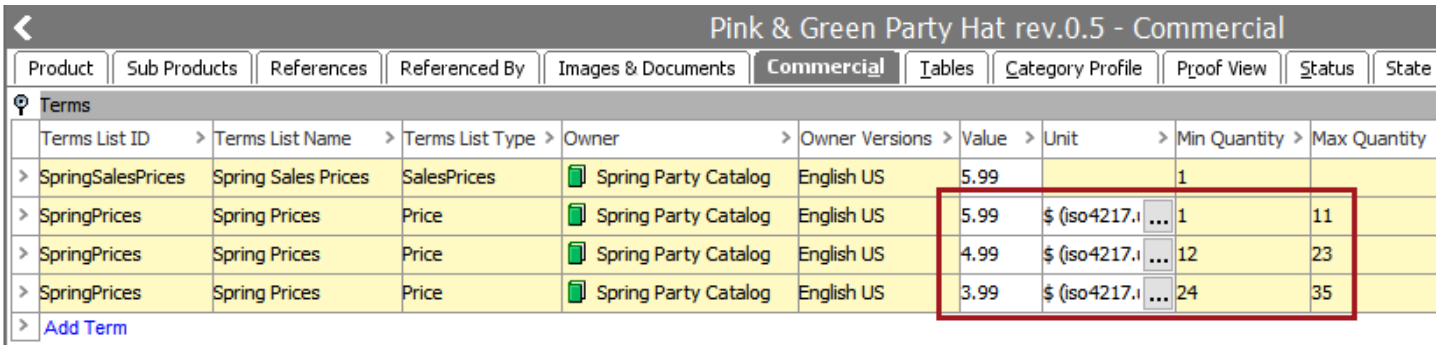


Mounting a Product With Commercial Terms

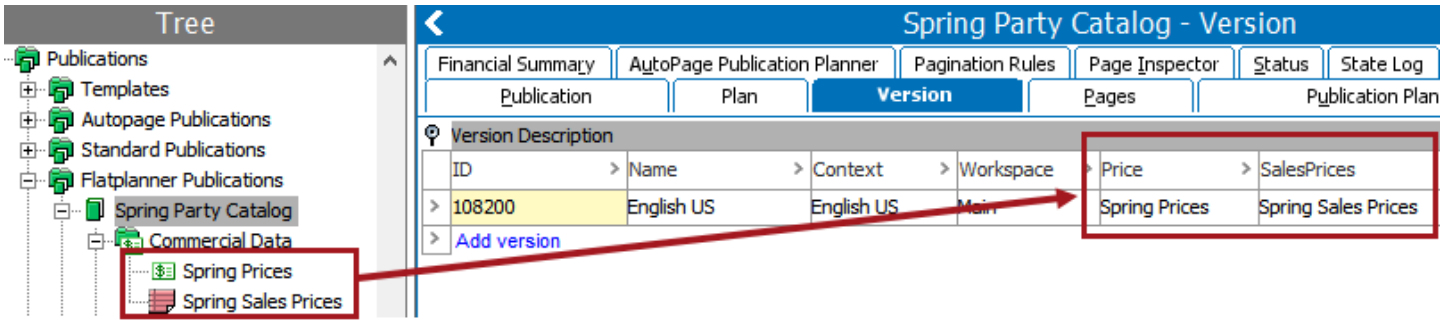
The following sample product template is configured to mount three terms for a single product. The tags for Value are in black text, the tags for Unit are in pink, and the tags for Minimum Quantity and Maximum Quantity are in blue.



The product, 'Pink & Green Party Hat,' has three terms in the 'Price' terms list type. Price 1 is $5.99; price 2 is $4.99, for a minimum of 12 and maximum of 23 pieces; and price 3 is $3.99, for a minimum of 24 pieces and maximum of 35 pieces. (Note that the product template has not been configured to pick up the minimum and maximum quantity values from price 1.)



Note: Before mounting the product, make sure that your commercial data lists are mapped to the publication version that you are using to build your page. For more information, see **Mapping Commercial Lists to Publication Versions** in the **Commercial Data** documentation.



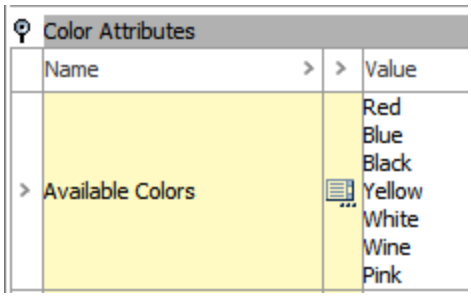
The mounted product appears as follows:

Mounting Multi-Valued Attributes and Attribute Groups

This topic describes how to configure a product template to mount multi-valued attributes and attribute groups. The setup for both is similar, as multiple values are placed onto the page at once, and repeat separators can be configured to separate the values. Additionally, when mounting attributes from an attribute group, a sequencing attribute can be configured to control the order that the values mount on the page.

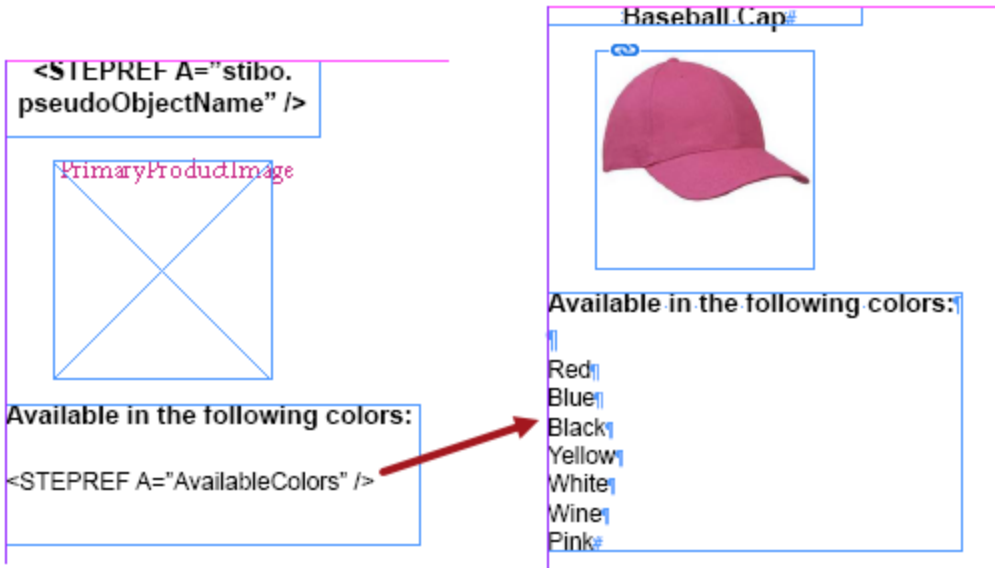
Mounting Multi-Valued Attributes

The following screenshot shows an example of a multi-valued attribute in STEP.

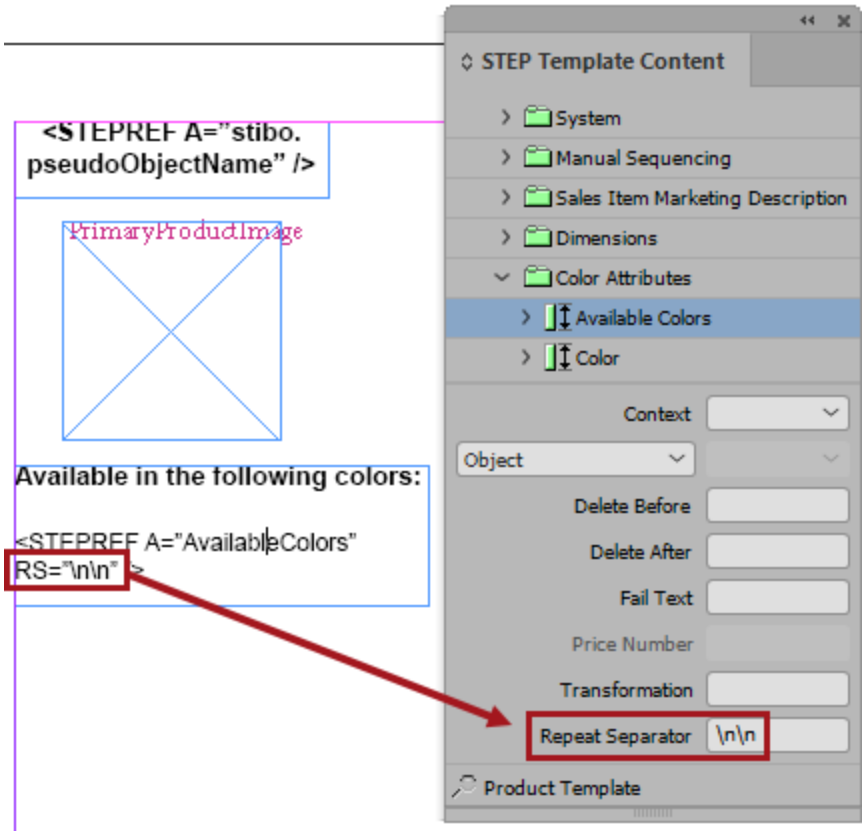


An attribute with multiple values is placed onto a product template by the same method used to place any other attribute onto the template. The difference in configuration between a single-valued and a multi-valued attribute is that a **repeat separator** can be applied to the attribute to control the separation of the values on the page.

By default, the values of multi-valued attributes appear on the mounted page separated by hard returns. Pictured below on the left is a sample product template with a tag for a multi-valued attribute without a repeat separator applied to the tag. On the right is a mounted product with the values of the attribute separated by hard returns.



If more space should be placed between the values, or if a different separator should be used, then a **repeat separator** must be set. Common repeat separators are \n (hard return), \r (soft return), or \t (tab), though a separator can be as simple as a comma. In the following example, two instances of the hard return (\n) have been added to insert another paragraph break between each value. The first screenshot shows the repeat separators added to the tag. The second screenshot shows the same product mounted, but with the additional hard returns between the values.



Adding a Repeat Separator

To add a repeat separator to the tag:

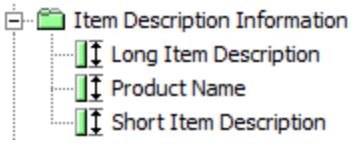
1. Using the InDesign text tool, place your cursor inside of the relevant tag on the product template.
2. On the STEP Template Content panel, enter a repeat separator character into the **Repeat Separator** field.
3. Press **Enter** to apply the separator to the tag.

If additional styling is desired, such as bullets, then these can be configured with an InDesign paragraph style.

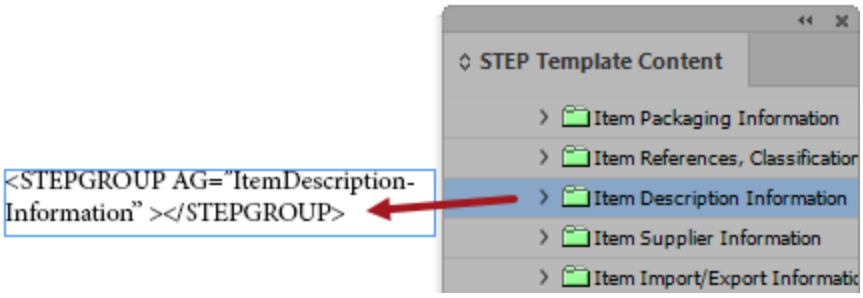
Mounting Attribute Groups

If multiple attributes are needed on a page, and all attributes are within the same group, then an easier and more dynamic setup for the product presentation is to mount the entire attribute **group**. This reduces the setup involved in adding separate tags for each attribute. Additionally, as attributes are added to or removed from the group in STEP, the mounted data can be updated to ensure that only values from the attributes within the group are displayed.

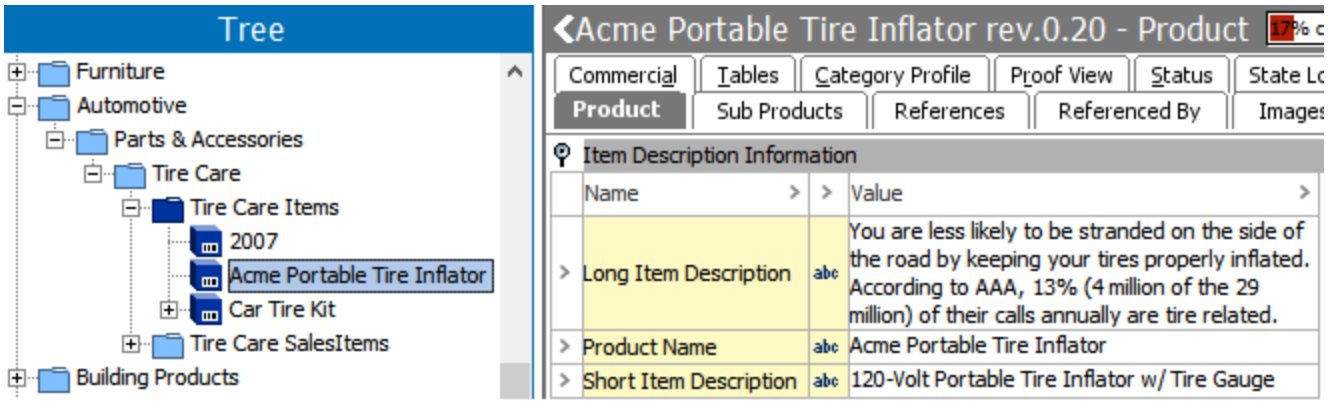
In this example, a small group with only three attributes is used.



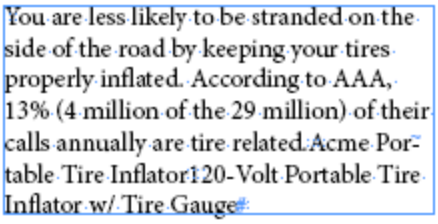
On product templates, a tag to mount values from an entire attribute group can be placed into a frame, as opposed to the more common practice of placing multiple attributes into the frame.



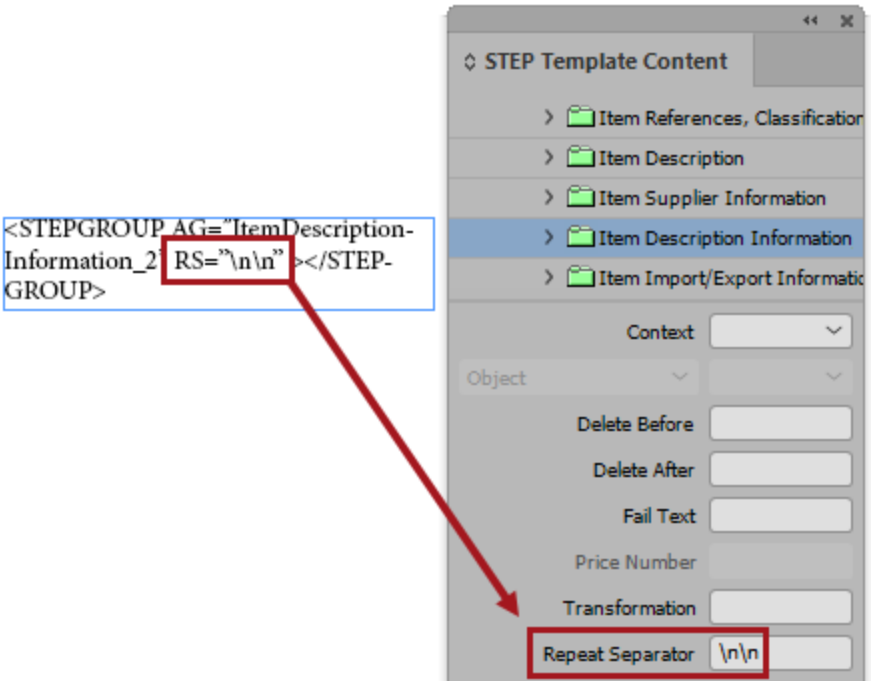
When an object is mounted onto an InDesign page using a product template containing this type of tag, the values from all attributes within the group are mounted.



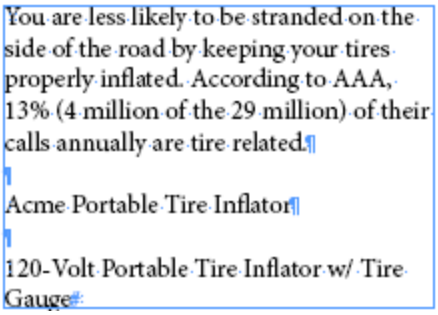
If a repeat separator is not set on the attribute group tag on the product template, the values will mount together without a separator at all.



To apply a repeat separator to the attribute tag, follow the same steps used to add a separator to the multi-valued attribute tag, outlined above in the 'Adding a Repeat Separator' section.



With a repeat separator added (in this example, \n\n), the values mount as pictured below:



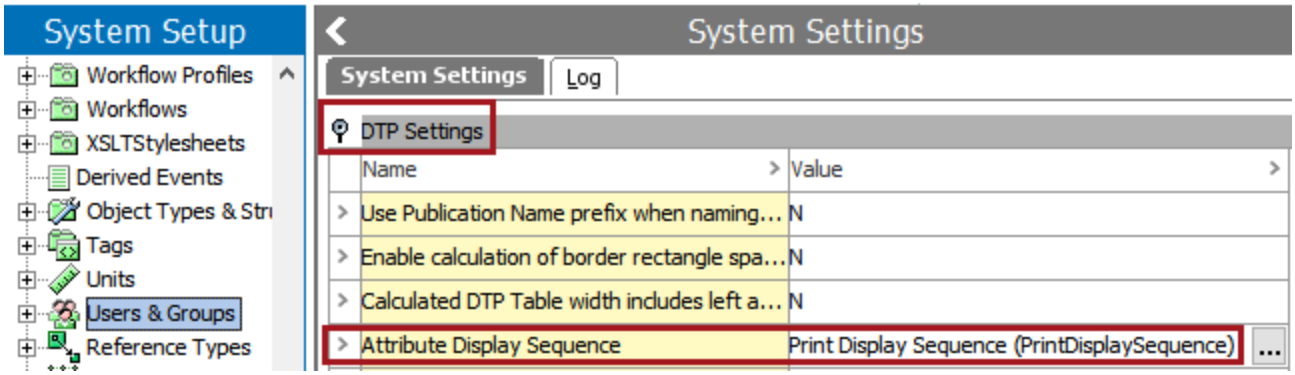
Attribute Display Sequence for Print Output

When mounting values from an attribute group, the values will be mounted in the order that the attributes appear within the attribute group. This is typically in alphabetical order, unless the attributes have been manually sorted previously. If you need the attributes to mount in a specific order on the page, an **Attribute Display Sequence** attribute is used. This is not configured on the product template; it is set up in the workbench.

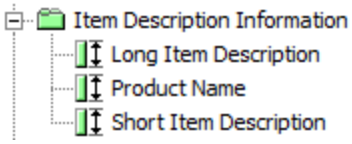
Note: The 'Attribute Display Sequence' setting under DTP Settings is **not** the same as the 'Default Attribute to use as Display Sequence Attribute' setting under 'Product Information Manager Default Settings.' The attribute chosen for 'Default Attribute to use as Display Sequence' is used to sort the order of attributes as they display in the STEP Workbench. The 'Attribute Display Sequence' setting is solely used to control the order of attribute group values on mounted InDesign pages. The values added for a print attribute display sequence attribute do NOT affect the order that the attributes display in the workbench product editors.

An attribute display sequence attribute is created and configured in a near-identical fashion to the display sequence attribute used to control the order of attributes in the STEP Workbench. This topic describes how to use an attribute display sequence attribute for print output but not how to create the attribute itself. For information on how to create an attribute sequencing attribute, see the **Attribute Display Sequence** section of the **Attributes** documentation.

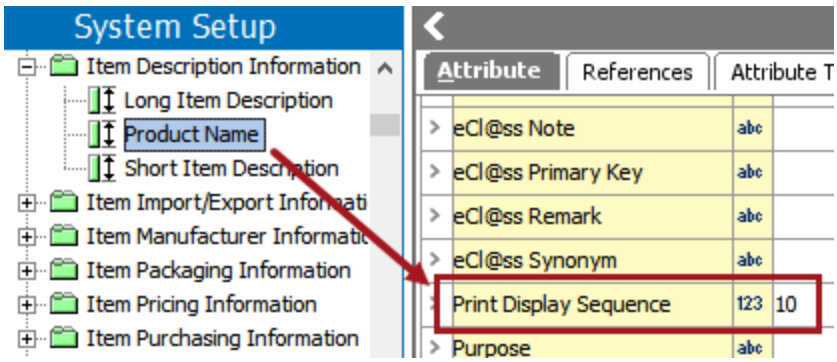
In this example, an attribute named 'Print Display Sequence' is used.



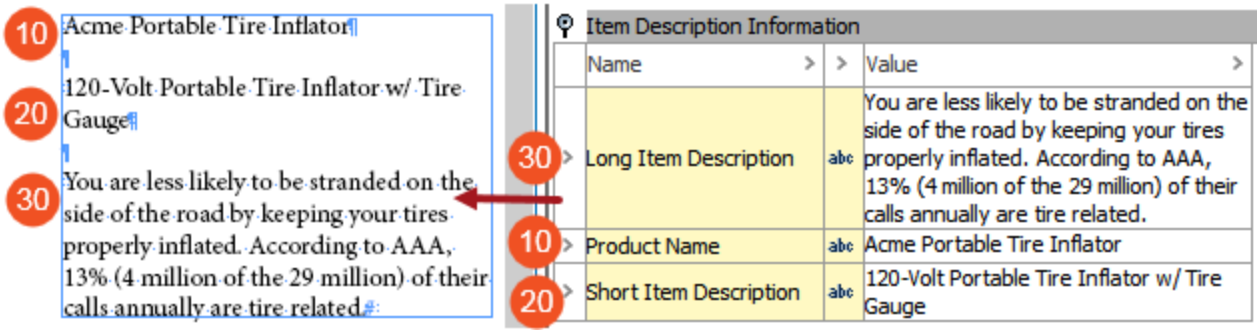
In the Item Description Information attribute group, the attributes are arranged alphabetically.



To set the mounting order on the attributes, locate the attributes in System setup and add the relevant numeric values. For this example, Product Name will mount first (value of 10, pictured below). Short Item Description will mount second (value of 20) and Long Item Description will mount third (value of 30).

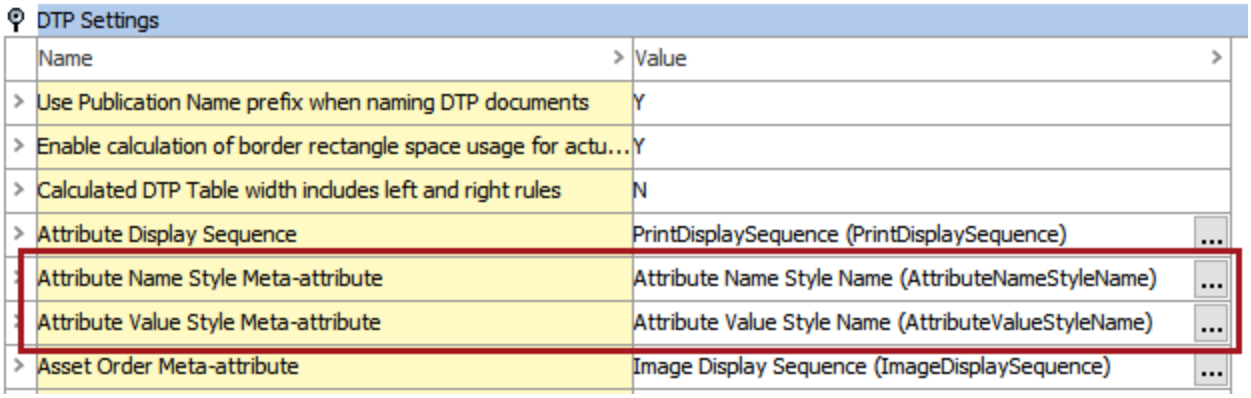


The mounted product now displays with the attributes in the order set by the Print Display Sequence attribute:



Applying Styles to Attributes From Mounted Attribute Groups

To apply styles to mounted attributes from mounted attributes, two metadata attributes are used and configured in System Settings under Users & Groups—**Attribute Name Style Meta-attribute** and **Attribute Value Style Meta-attribute**.

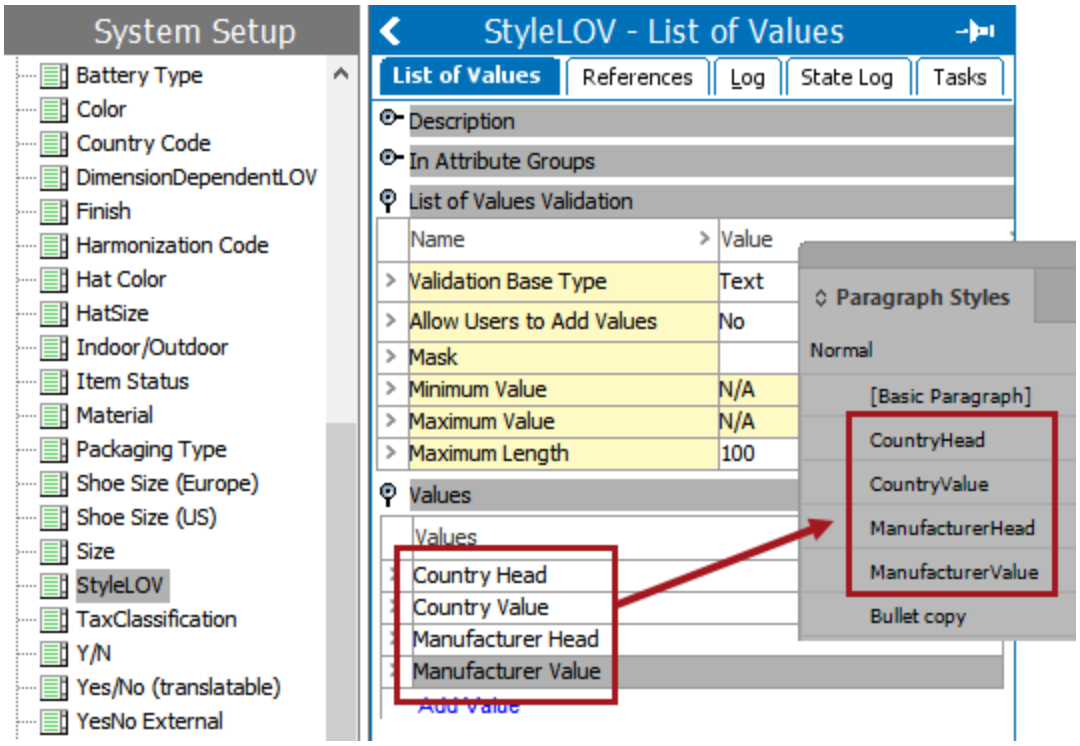


These attributes are required only when the style of the attributes' names and/or values differ from attribute to attribute within the attribute group. For instances where the styles of the attribute names and/or values do *not* change, the product template can normally be used to generate the desired effect.

The description attributes used for the 'Attribute Name Style Meta-attribute' and 'Attribute Value Style Meta-attribute' settings are used to call out paragraph styles (not character styles) in InDesign that are applied to the name of a mounted attribute and the value of a mounted attribute, respectively, when mounted as part of an attribute group. These attributes are made valid on the Attribute object type. The values of these attributes should be an exact match to corresponding paragraph styles in the publication template / mounting page.).

Style LOV

These attributes must use an LOV that holds all of the required style names used both for the attribute names and the attribute values. The values of this LOV must be exact matches to the names of the corresponding paragraph styles in InDesign.

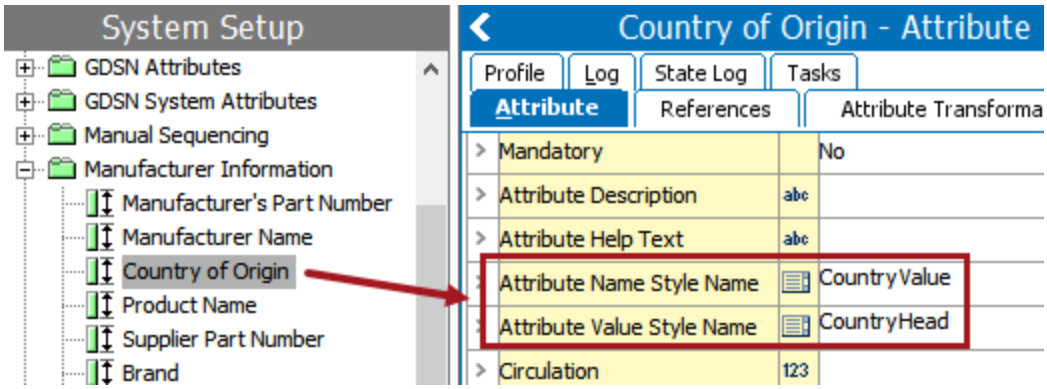


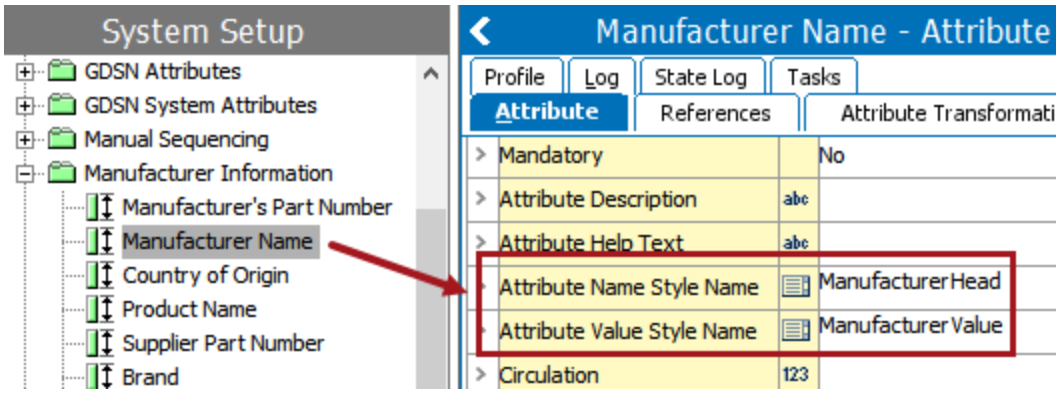
Adding the Style Attributes in System Settings

1. In System Setup, navigate to Users & Groups > **System Settings**.
2. Expand the DTP Settings flipper and click the ellipsis button (**...**) for **Attribute Name Style Meta-attribute**.
3. Browse to or search for the relevant attribute in the 'Attribute Name Style Meta-attribute' dialog, then click Select.
4. Follow the previous steps to select the attribute for **Attribute Value Style Meta-attribute**.

Assigning Styles to Attributes in the Workbench

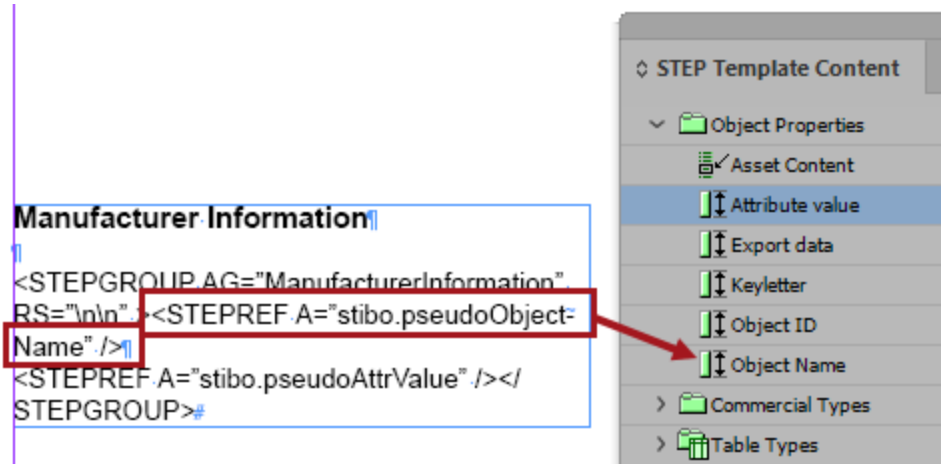
To assign the style attributes to the attributes that will be mounted, choose the relevant LOV values from the dropdown lists contained within the attribute name style and attribute value style attributes. The below screenshots show four different style selections: one for the Country of Origin attribute name, one for the Country of Origin attribute value, one for the Manufacturer Name attribute name, and one for the Manufacturer name attribute value.

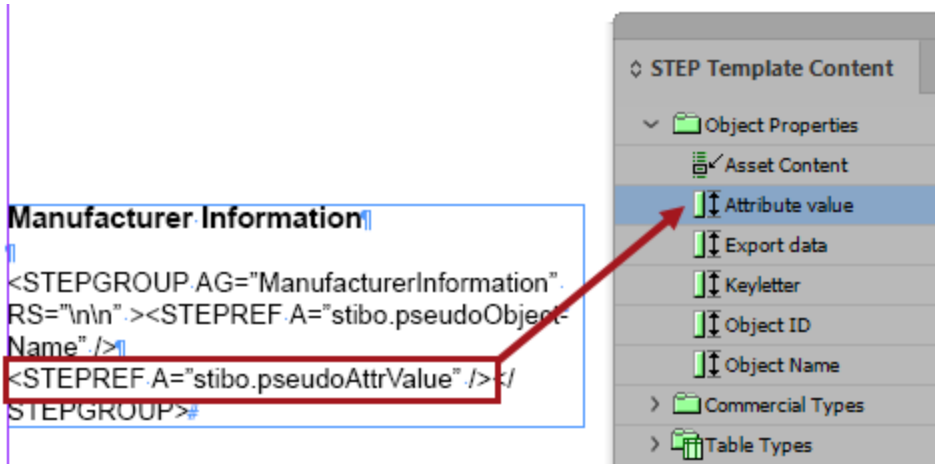




Configuring the Product Template

The following two tags under Object Properties on the STEP Template Content panel are used to pull in the attribute name and the attribute value, respectively: Object Name and Attribute value.





The <STEPGROUP> tag should appear at the beginning of the tag grouping and close with the </STEPGROUP> tag.

Note: The tags containing the attribute name and the attribute value must appear in separate paragraphs for the styles to be applied, since they are paragraph styles and not character styles.

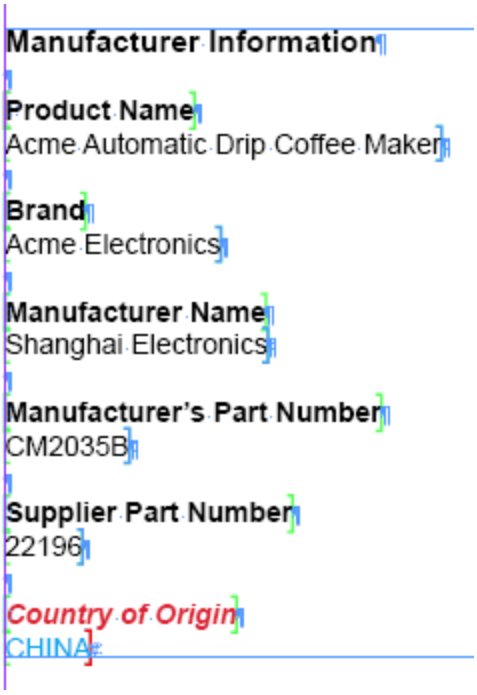
Mounted Product

The following attribute names and attribute values have been mounted on the page in this example.

Manufacturer Information

Name	Value
Manufacturer's Part Number	CM2035B
Manufacturer Name	Shanghai Electronics
Country of Origin	CHINA
Product Name	Acme Automatic Drip Coffee Maker
Brand	Acme Electronics
Supplier Part Number	22196

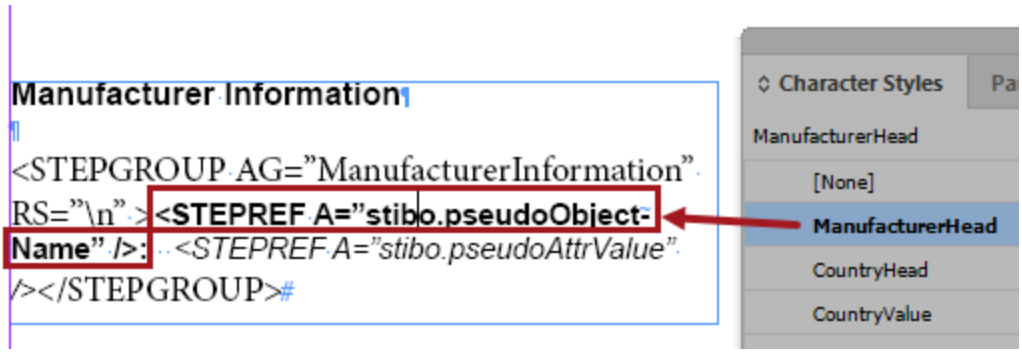
Note that the attributes have also been sequenced, using the method outlined in the 'Attribute Display Sequence for Print Output' section of this topic.

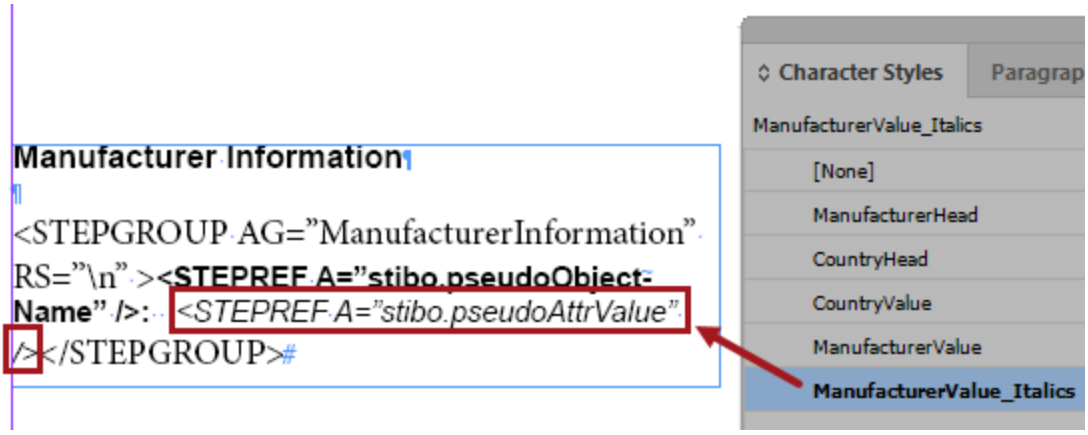


Configuring the Product Template Styles Without Using Workbench Metadata Attributes

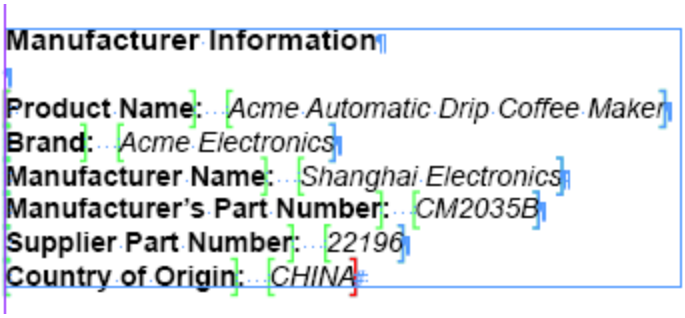
If the paragraph styles should be the same for all attributes in the group, the styling can be controlled in the product template. This eliminates the need to set up the metadata styling attributes in STEP.

By using the product template to control the styles, character styles can be used, so the attribute name and the attribute value do not have to appear in separate paragraphs. However, paragraph styles can still be used if desired.





In this example, the attribute names and style meta-attributes are not being used in the system. The effect on the mounted page is accomplished via the setup in the product template.



Mounting Attributes and Images Without a Product Template

Though uncommon, it is possible to mount attribute values and images onto pages without using a product template. This type of 'one-off' mounting is done in case you would like to add additional data to a page that is not included in a product template, allowing you to add elements from STEP that you can update later instead of adding free text or an image that has no connection to STEP.

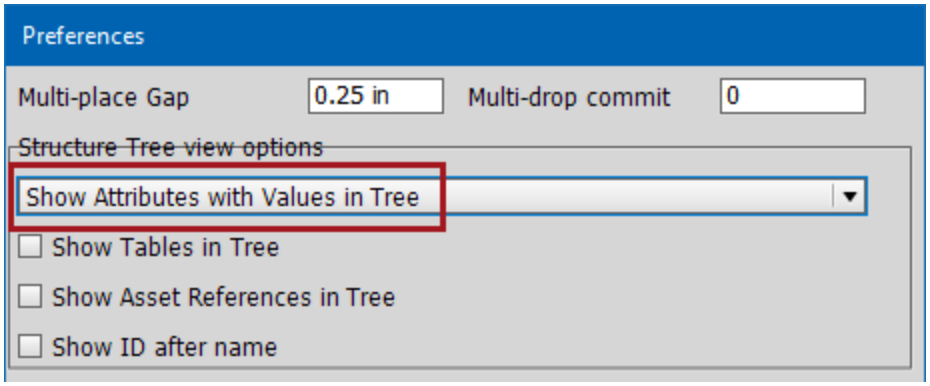
Attributes are mounted from the **STEP Structure View** panel, and images are mounted from the **STEP Images** panel.

This topic assumes that you have a basic familiarity with these panels and have already created the publication template / mounting page onto which you will be mounting data.

Mounting Attributes Without a Product Template

In order to mount attributes onto the page, they must first be visible within the STEP Structure View panel. The following steps explain how to display the attributes in the STEP Structure View tree, then how to drag them onto the InDesign page.

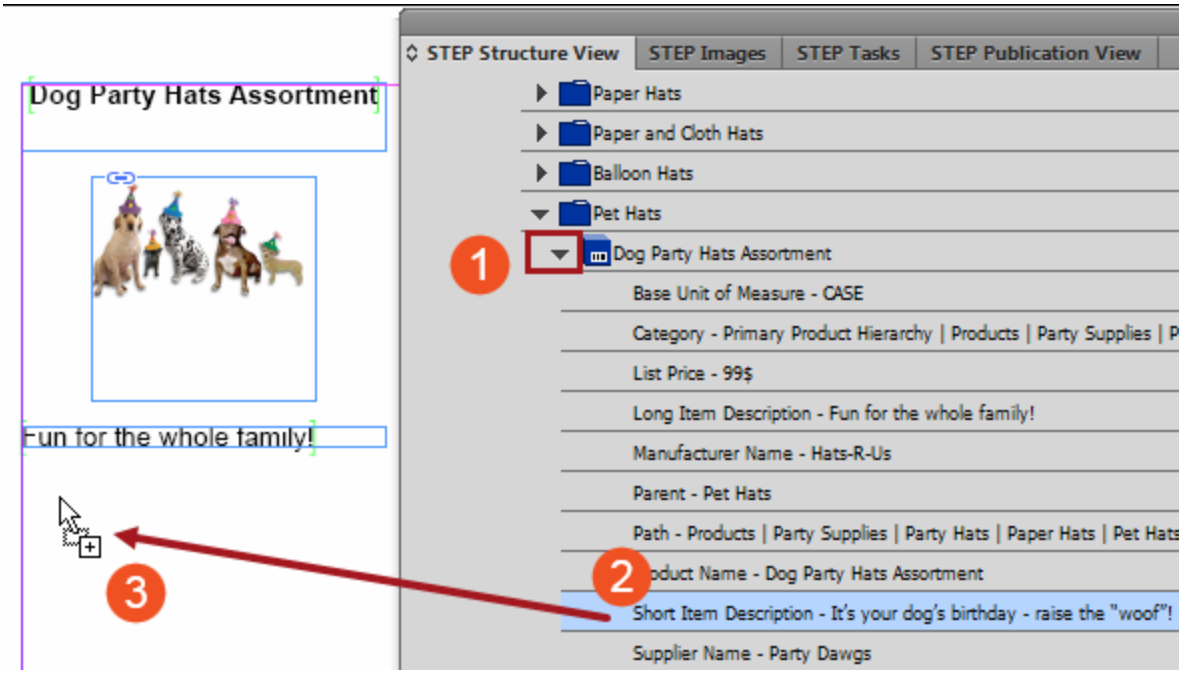
1. In InDesign, navigate to STEP > Preferences to open the **Preferences** menu.
2. Select **Show Attributes with Values in Tree** from the topmost dropdown list on the dialog, then click **OK**.



3. Open the STEP Structure View panel by navigating to Window > **STEP Structure View**.
4. In the STEP Structure View tree, locate the object that contains the attribute(s) with the values that you would like to mount onto the page. This can be any object type that has linked attributes and is not limited to product objects.

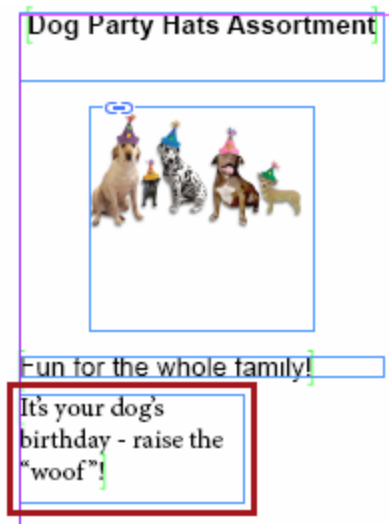
   To locate an object in the STEP Structure View, either browse through the tree or click on the magnifying glass icon in the lower left corner of the panel to display the **Search** dialog. The Search dialog can also be accessed by clicking the **Options** dropdown arrow in the upper right corner of the panel.

5. Click the black arrow next to the object to expand the list of linked attributes with values.
6. With your publication template or mounting page open, select the attribute whose value you would like to mount onto the page, then hold down the left mouse button as you drag it onto the InDesign page.



Note: Attributes can be multi-selected by holding the Ctrl or Shift key while making selections, but all attribute values will mount into a single text frame.

7. Release your mouse button where you would like to drop the content.
8. A frame is created on the page containing the attribute value.

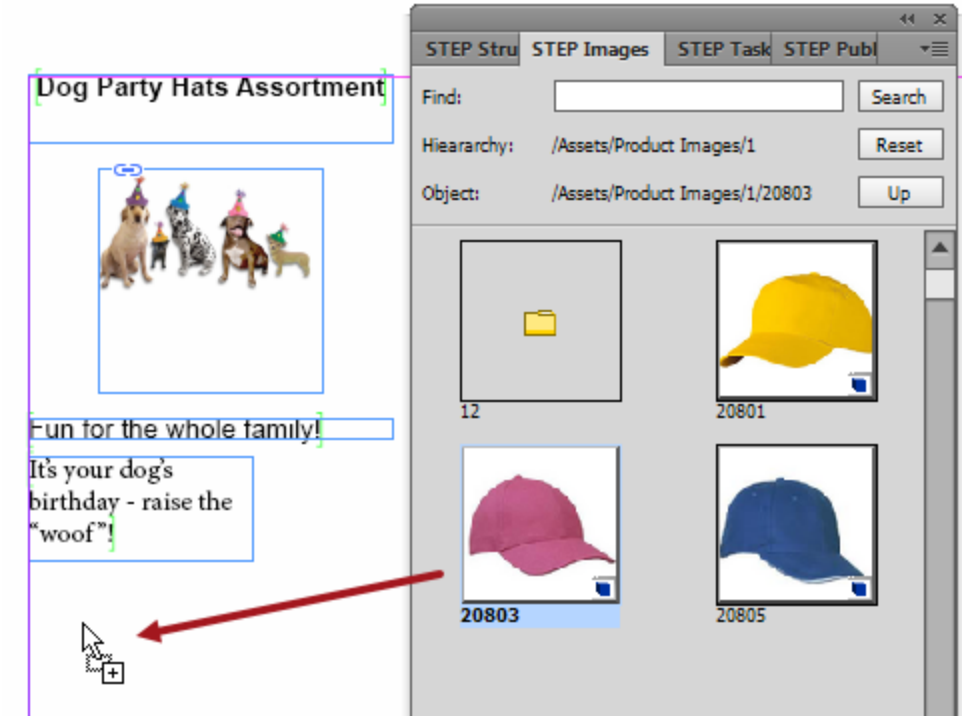


Alternatively, you may draw a text frame on the InDesign page using the Type tool (T) before dragging over the attribute value. The value is dragged and dropped onto the page in the same manner as described in the previous instructions, except the attribute is dropped into the preexisting frame instead of onto a blank area on the page.

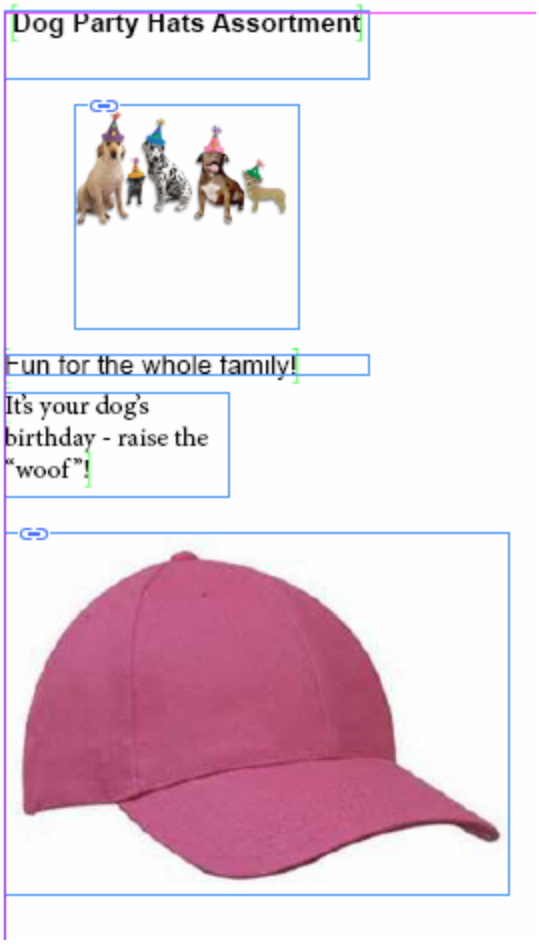
Mounting Images Without a Product Template

Images are mounted directly from the STEP Images panel for reasons such as full-page ads in catalogs that consist of a single image that do not need to be mounted with a product template.

1. Open the STEP Images panel by navigating to Window > **STEP Images**.
2. Locate the image that you would like to mount by searching or browsing in the panel. Only one image at a time can be mounted from the STEP Images panel.
3. Select the image, then hold down the left button of your mouse as you drag the image onto the page.



4. Let go of the mouse button where you would like to drop the image.
5. The image is placed on the page.



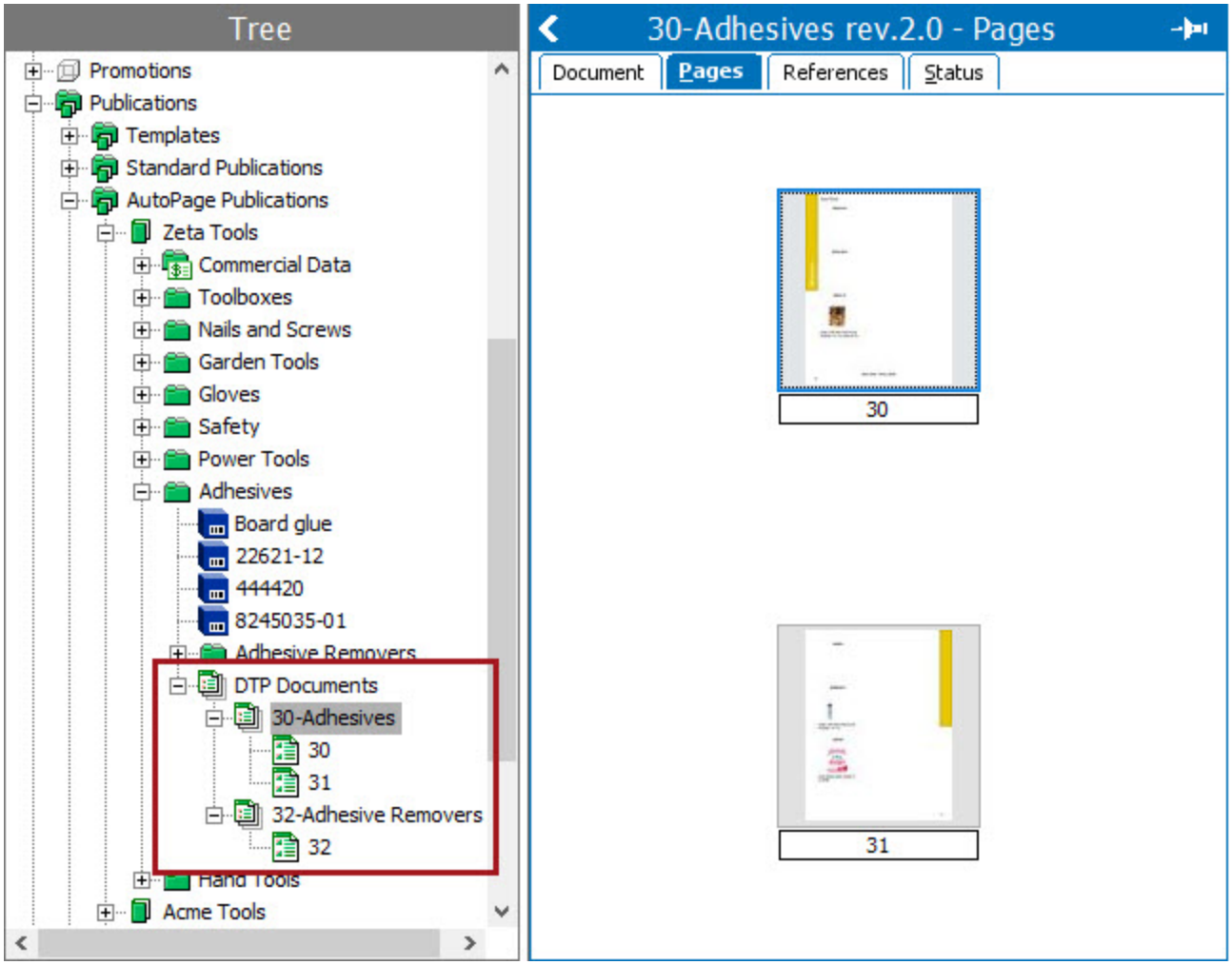
Note: Images dragged onto pages from the STEP Images panel are placed onto the page at the actual size that they exist in STEP.

Saving Finalized InDesign Documents to STEP

Another important feature of STEP Publisher is the ability to save finalized InDesign documents back to STEP. One of the primary reasons to save InDesign documents to STEP is to enable users across an organization or across geography to access these documents, in addition to the following advantages:

Document Visibility in STEP

The documents become visible in STEP, allowing users who do not use InDesign to view the pages in the workbench.

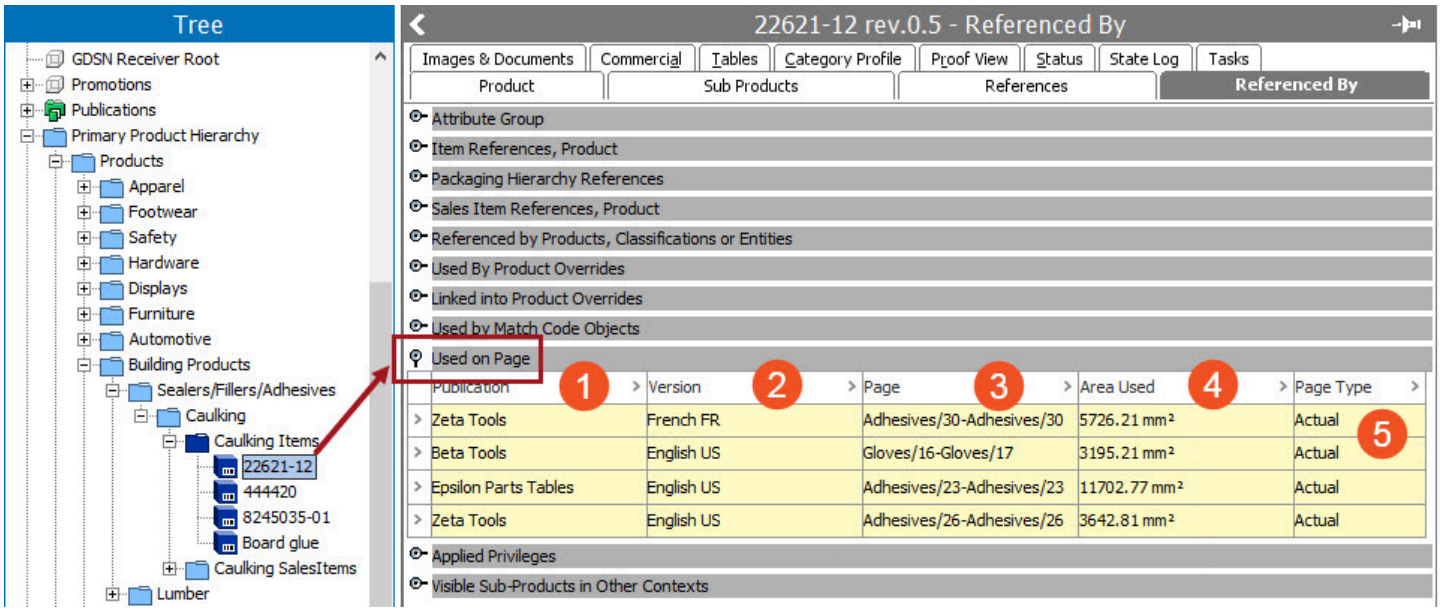


'Referenced By' Product and Entity Data for Publications

It is possible to view the following publication-related information on the **Referenced By** tab under the **Used on Page** flipper for both products and entities. The numbers in the below list correspond with the numbers in the

screenshot directly below the list.

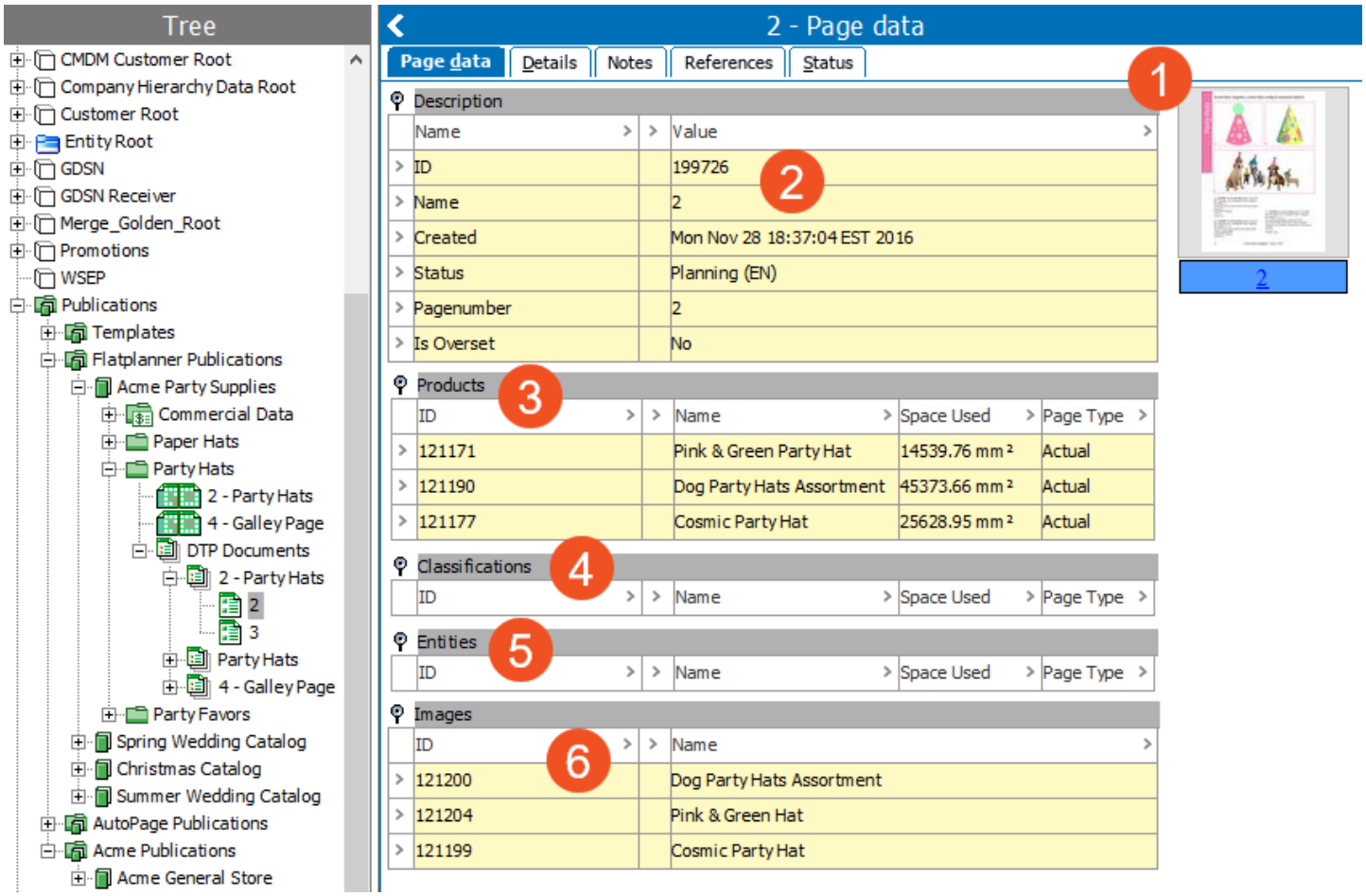
1. Which **publications** the product or entity appears in
2. Which **versions** of these publications the product or entity appears in
3. What **page(s)** the product or entity appears in within these publications
4. How much **space** the product or entity takes up on the page(s) on which it appears (Area Used)
5. Whether the page type is Actual (a mounted InDesign document) or Planned (a Flatplanner planned page).



Page Data

It is possible to look at a page in STEP and view the following information on the **Page Data** tab. The numbers in the below list correspond with the numbers in the screenshot directly below the list.

1. Thumbnail preview of the InDesign page
2. Page description:
   - STEP ID and Name
   - Date created (when the document was saved to STEP)
   - **Status:** If the page is in a Flatplanner workflow, the status shows the workflow state that the DTP page is in.
   - Page number
   - **Overset:** If the page contains text or frames with overset content, meaning there is content on the page that does not fit in one or more frames, then the value will be 'Yes.'
3. The list of **products** used on the page and the space used by each product
4. The list of **classifications** used on the page and the space used by each classification
5. The list of **entities** used on the page and the space used by each entity
6. The list of **images** used on the page



Other Advantages

- It is possible to reuse product layouts when working with Flatplanner. See **Reusing Saved Layouts** in the **Flatplanner** documentation for more information.
- It is possible to create **indexes** that list the page numbers of all mounted objects in the publication. See the **Creating Document Indexes** topic for more information.

Saving a Mounted Document to STEP

Once you have finalized your mounted page in InDesign, the typical next step is to save it back to STEP.

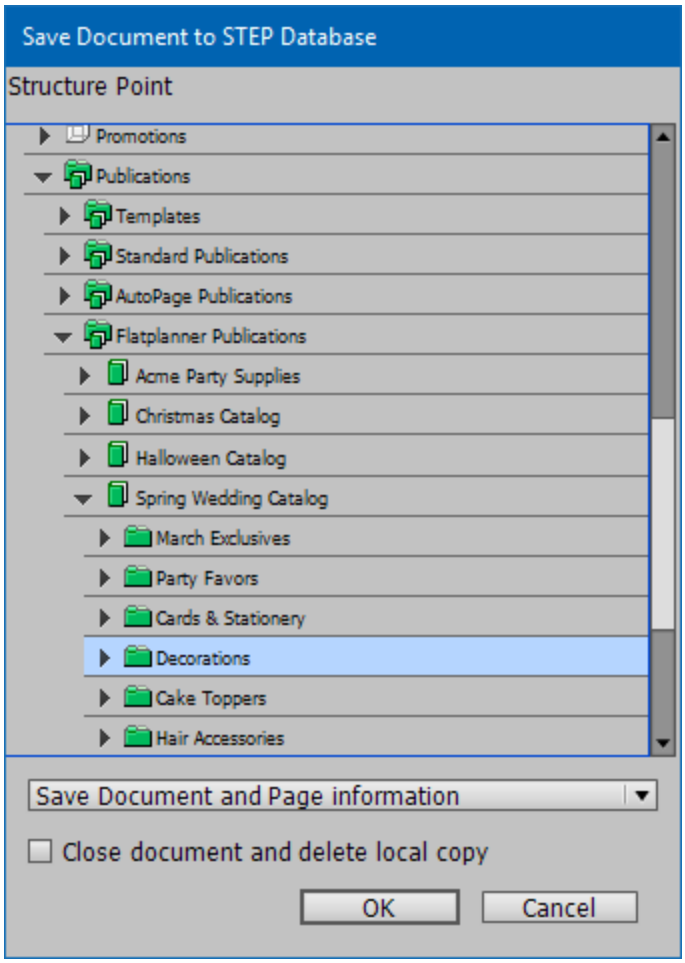
Though it is optional to save mounted InDesign documents back to STEP, these documents must exist in STEP in order to take full advantage of STEP's publishing capabilities, such as extraction of product indexes and calculation of space usage.

To save a mounted InDesign document back to STEP, follow these steps:

1. With your mounted document open in InDesign, first save it to your computer's hard drive.

> **Note:** InDesign documents must first be saved locally before they can be saved to STEP.

2. Next, navigate to STEP > **Save Document to DB** from the top of the InDesign interface.
3. In the **Save Document to STEP Database** dialog box that displays, the section folder from which you mounted your planned page should be automatically selected. If not, navigate to the correct section.



4. From the dropdown list, select **Save Document and Page Information** (default) or **Save Page Information**.

   Choose **Save Document and Page Information** to save page information, such as page numbers and space allocation, into STEP as well as the actual InDesign page itself. This option stores these documents in the database for you and other users to access later.

   Select **Save Page Information** if you would only like to save page information into STEP. This option will save a thumbnail of your page to STEP but not the actual InDesign page itself. Some users may prefer this option in order to save space on their STEP application server.

5. Check **Close document and delete local copy** if you would like to save the document to STEP, then have the local copy automatically deleted from your computer.
6. Click **OK**. The document is saved back to STEP within the correct publication.

Proof View

The Proof View component is used to generate visual proofs of product presentations within the workbench and Web UI, providing a quick view of how a product presentation will look on a printed page. The component is also used to generate PDFs of these product presentations.

Typically, Proof View is used to produce small documents such as single-product datasheets; nutritional information tables; and documents that relate to health, safety, and energy regulations such as MSDS (Material Safety Data Sheet) documents, EPREL (European Product Registry for Energy Labeling) datasheets, and CE certificates. These documents may be as short as one page, or multi-page depending on business requirements.

Product proof views are also useful to product managers who would like a visual representation of the current status of data for different layouts, giving them a better overview of the quality of the data before approval.

Prerequisites

Prior to using Proof View in the workbench or Web UI, the following prerequisites must be met:

- An **InDesign server** must be connected to your STEP system, since it is the InDesign server that generates proofs. For more information on the deployment of an InDesign server, contact your Stibo Systems account manager.
- The following **licenses** must be installed on your system. Contact your account manager or partner manager to begin the process of enabling a license or licenses for your system.
    - STEPPublish
    - STEPPublish.InDesign
    - STEPPublish.ServerSide
    - STEPPublish.ServerSide.InDesign
- At least one **publication** with at least one **version** must have already been created in the publication hierarchy in the workbench. For more information on creating publications, see the **Publication Hierarchy** section of the **STEP Publisher (Adobe InDesign Integration)** documentation.
- A **publication template** and at least one **product template** must have already been configured and attached to the relevant publication in the workbench. For more information on templates, see the **Templates in STEP Publisher** section of the **STEP Publisher** documentation.

Considerations

- Proof View supports both **products** and **entities** in the workbench. Entities are not supported in the Web UI Proof View component.
- Proof View can only be used for one product at a time, and only one product template can be used at a time. This requires that all data must be available either directly on the object being viewed or referenced from the object. Tables can also be used to display information from child and/or referenced products. For information on configuring product templates, see the **Product Templates** section of the **STEP Publisher** documentation. For information on configuring tables, see the **Tables** section of the online help.

- The proof view functionality for STEP Publisher should not be confused with the unrelated Web UI proof view functionality that uses **XSLT** to preview how a product will display on the web. The XSLT proof view feature uses a Web UI component called 'Proof View Action,' which uses XML-formatted values and optional XSLT stylesheet transformations. It has no relation to STEP Publisher or Adobe InDesign. For more information on using XSLT in STEP, see the **IIEP - Configure Transformation by XSLT PreProcessor** topic in the **Inbound Integration Endpoints** section of the **Data Exchange** documentation.
- The same fonts used in your publication and product templates must be installed on your InDesign server for the pages to render accurately. If the fonts are not available, then a generic font (such as Minion Pro) will be used for the rendering.

Topics in this Guide

This guide covers the following topics related to Proof View in the workbench and Web UI:

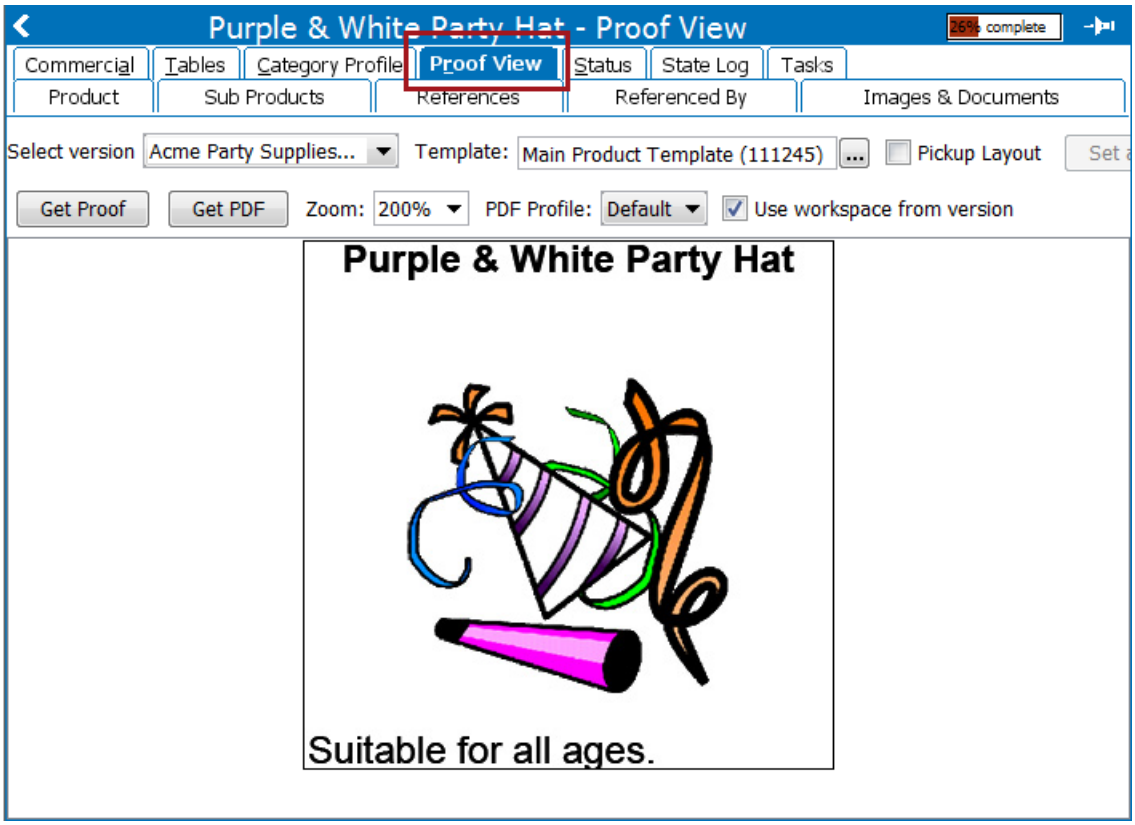
- Generating Proof Views and PDFs in Workbench
- Generating Proof Views and PDFs in Web UI
- Configuring the Web UI Proof View Component
- Proof View Troubleshooting

Generating Proof Views and PDFs in Workbench

Proof views can be generated for a single page or single spread in the workbench using the **Proof View** tab on **product** and **entity** objects. Proof views display a close representation of how a product or entity will look when mounted onto a page.

Note: An InDesign server must be connected to your STEP system to enable proof view functionality, as it is the InDesign server that generates proofs. For more information on the deployment of an InDesign server, contact your Stibo Systems account manager.

Proof views are also available for **products** (but not entities) in the Web UI, but this topic only explains how to access proof views in the workbench. See the **Generating Proof Views and PDFs in Web UI** topic in this guide for more information.



Choosing a Proof View Start Page

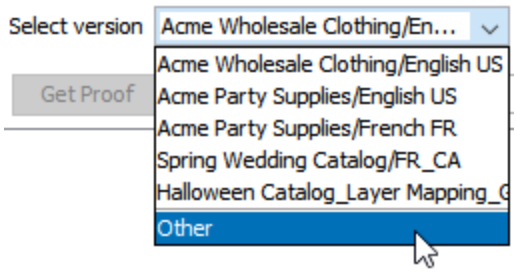
A proof view can either be started on page 1, for a right-hand page, or page 2, for a left-hand page. To choose the starting page number, the **Proof View Start Page Number** setting in System Settings (located under System Setup > Users and Groups > DTP Settings) must be set to either 1 or 2. By default, proof views begin on

page 2. However, a selection of '1' is useful, for example, when producing documents for PDF output, such as data sheets, which may not be produced in a 2-page spread format and should start page numbering at 1. For more information, see the **DTP Settings** topic in the **System Settings** documentation.

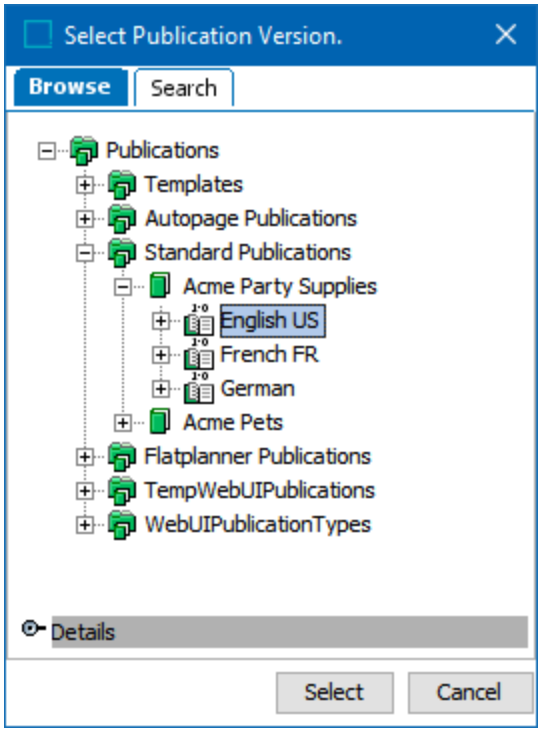
Generating a Proof View

To generate a proof view in the workbench:

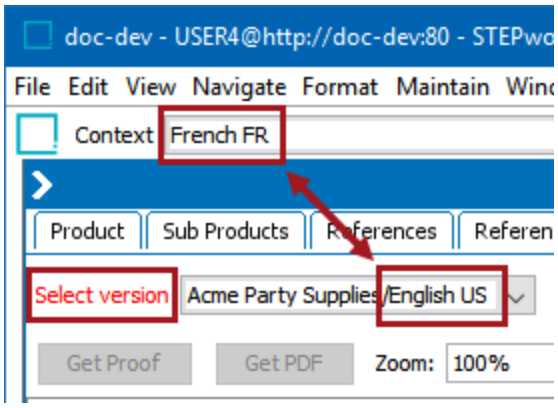
1. In the **Tree**, navigate to the product or entity object that you would like to preview, then click on the **Proof View** tab.
2. In the **Select version** dropdown, choose the publication version that you would like to use to preview the product or entity. By choosing the version, you are also selecting the publication and using its associated publication template as the backdrop of the proof view.
3. If the version you are looking for is not on the initial dropdown list, click **Other** to open the **Select Publication Version** dialog.



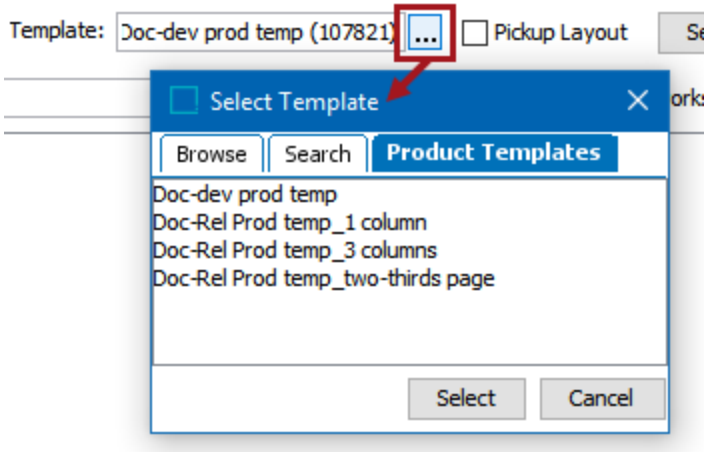
4. Browse to or search for the publication version that you would like to use, then click **Select**.



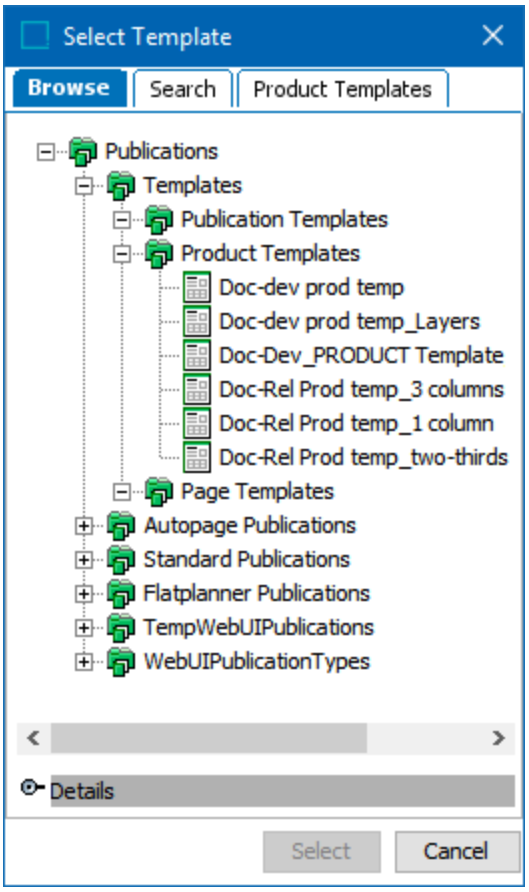
Note: If the context of the selected publication version does not match the context in which you are currently viewing the workbench, the words 'Select version' will appear in red to provide you with a visual indicator that the language displayed in the proof view will be different than that of the language displayed in the workbench.



5. To select the product template that you would like to use to view the product or entity, click the ellipsis button (...) to the right of the **Template** field. If a default product template has already been assigned to the product, it will display in this field.
6. In the **Select Template** dialog that displays, there are three tabs. By default, the dialog opens on the **Product Templates** tab.

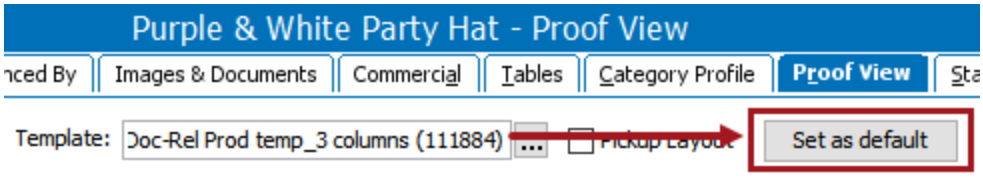


- **Product Templates:** The product templates linked to the publication you chose from the 'Select version' dialog. Only one can be chosen.
- **Browse:** Displays the publication hierarchy. Only product templates are available for selection.

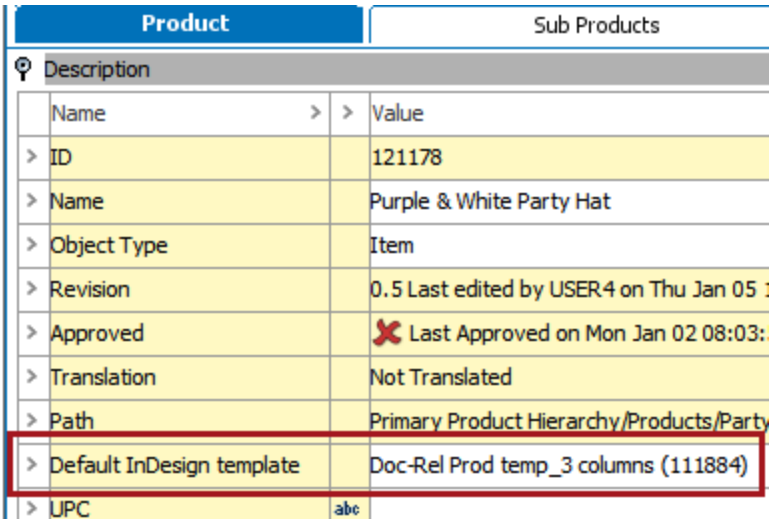


- **Search:** Displays a field where product templates can be located through typeahead search.

7. Once you have selected a product template, you can make it the default product template for your product or entity by clicking **Set as default**.



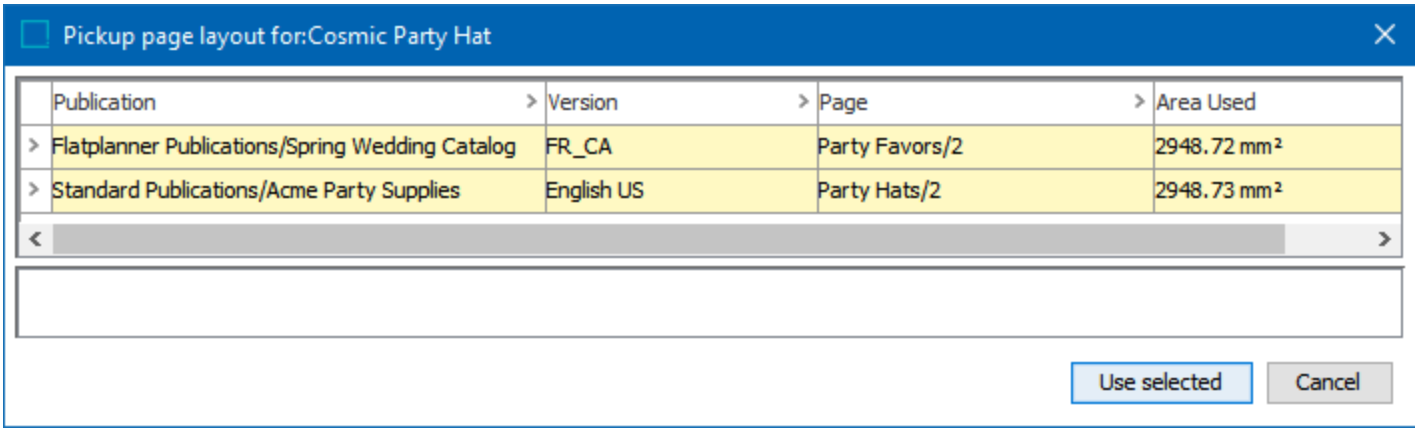
- To confirm that the default template selection is successful, click on the **Product** tab for products, or the **Entity** object name tab for entities, and check that the template displays in the **Default InDesign template** field.



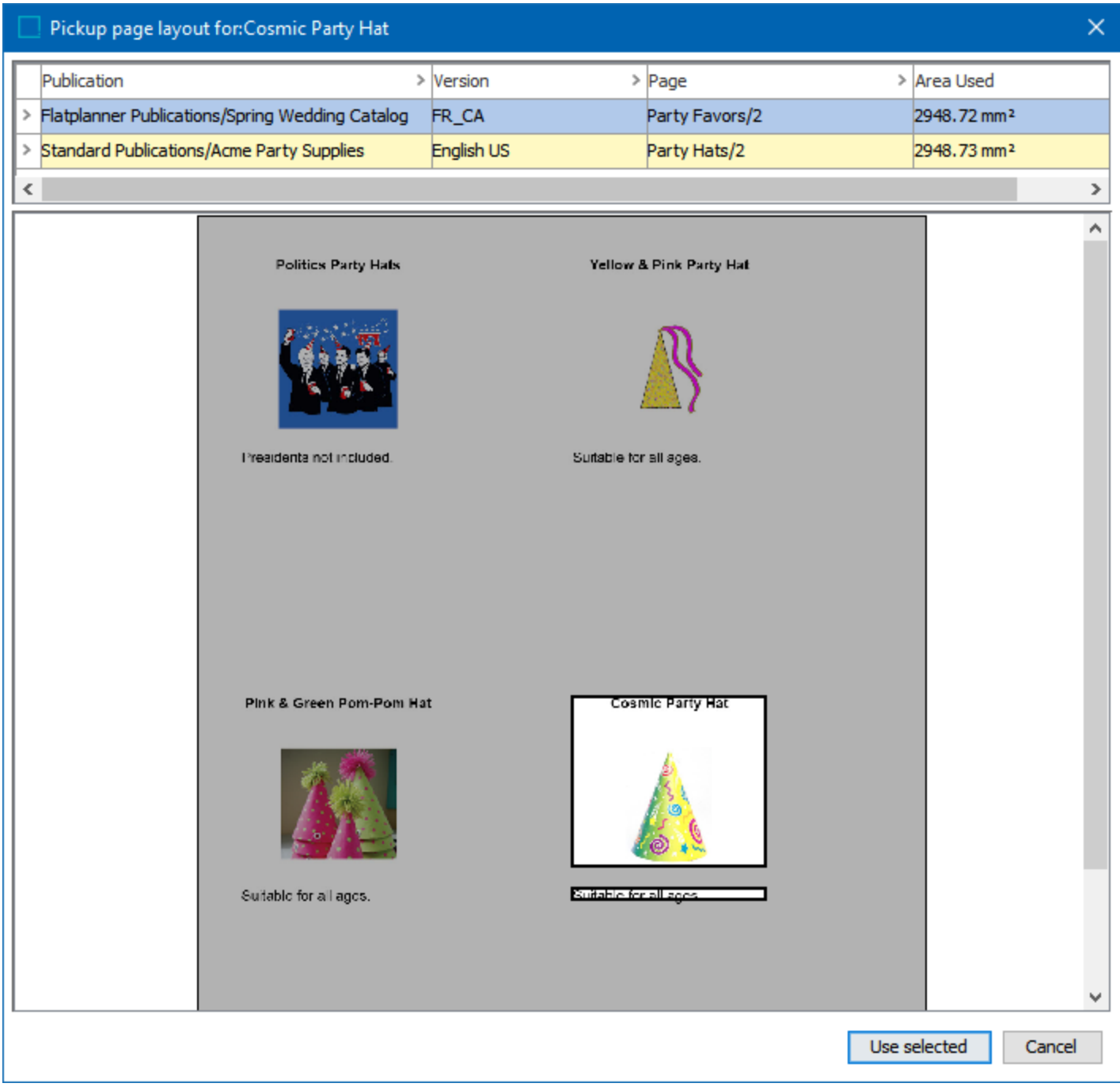
Note: If there is already a default product template assigned to the product or entity, clicking **Set as default** on the Proof View tab will overwrite the previously chosen template.

8. If you do not want to select a product template, and instead would like to pick up a layout from a publication in which the product or entity was previously mounted, check the **Pickup Layout** box.
   - When Pickup Layout is checked, the Template field is replaced with a **Pickup** field.

   - Click the ellipsis button (...) to the right of the Pickup field to launch the **Pickup page layout for** dialog.



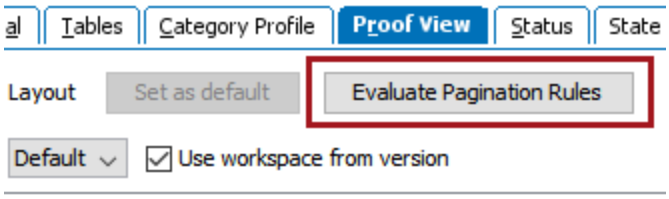
- Select the publication from which you would like to pick up the layout. The bottom of the dialog displays a preview of the actual page as it appears in the selected publication, with your product or entity's layout highlighted, and the rest of the page in gray.



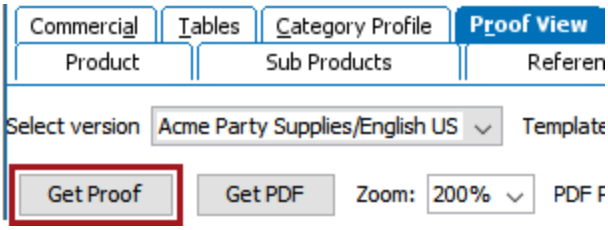
- Click **Use selected** to select the layout and close the dialog.

9. Click **Evaluate Pagination Rules** to evaluate pagination rules that will affect the layout. This feature is most commonly used for product objects linked to AutoPage publications. When a pagination rule exists in the

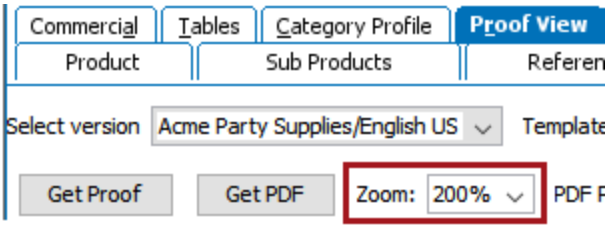
publication that you are using to view the proof, you can use this option to ensure that the pagination rule is displaying the product or entity correctly.



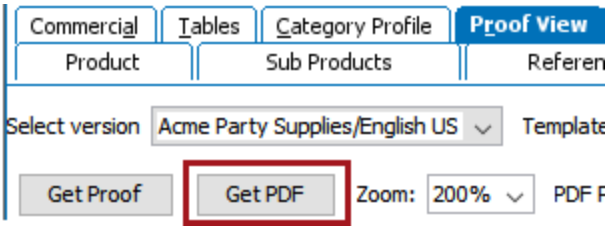
10. Click **Get Proof** to fetch the proof view from the InDesign server.



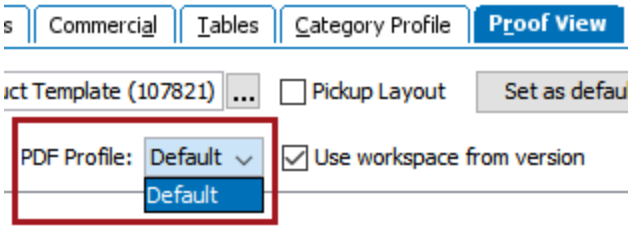
11. Click **Zoom** to zoom in or out of the proof. Zoom ranges from 25% to 400%. Alternatively, you can zoom in and out by using the scroll wheel on your mouse.



12. Click **Get PDF** to have STEP automatically generate a PDF of the proof view. This is considered a *foreground task* of the InDesign server, as a background process is not kicked off. The PDF will automatically display in the default PDF application once generated.



13. In the **PDF Profile** dropdown, the default selection is **Default**.



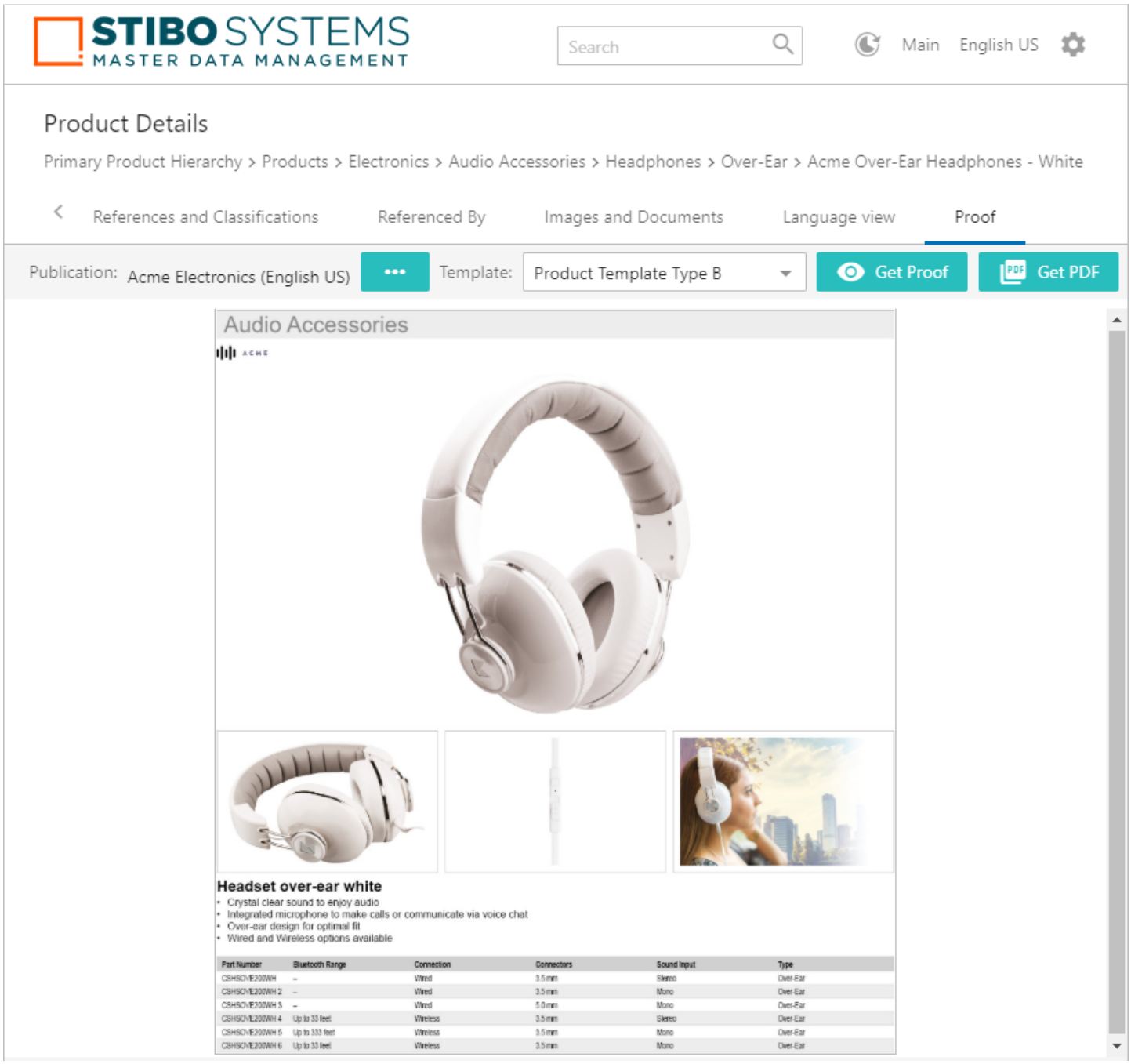
Note: PDF profiles are system dependent. Therefore, the PDF profile is set to Default if no special PDF profiles have been configured for the system. For more information on creating new PDF Profiles for your system, see the **Setting up PDF Profiles (Presets) for the InDesign Server** topic.

14. Check **Use workspace from version** to view the proof using the workspace from the publication version, which will be either Main or Approved. This option exists because proof views automatically display using the workspace that you are currently using in the workbench, *not* the workspace attached to the publication version.

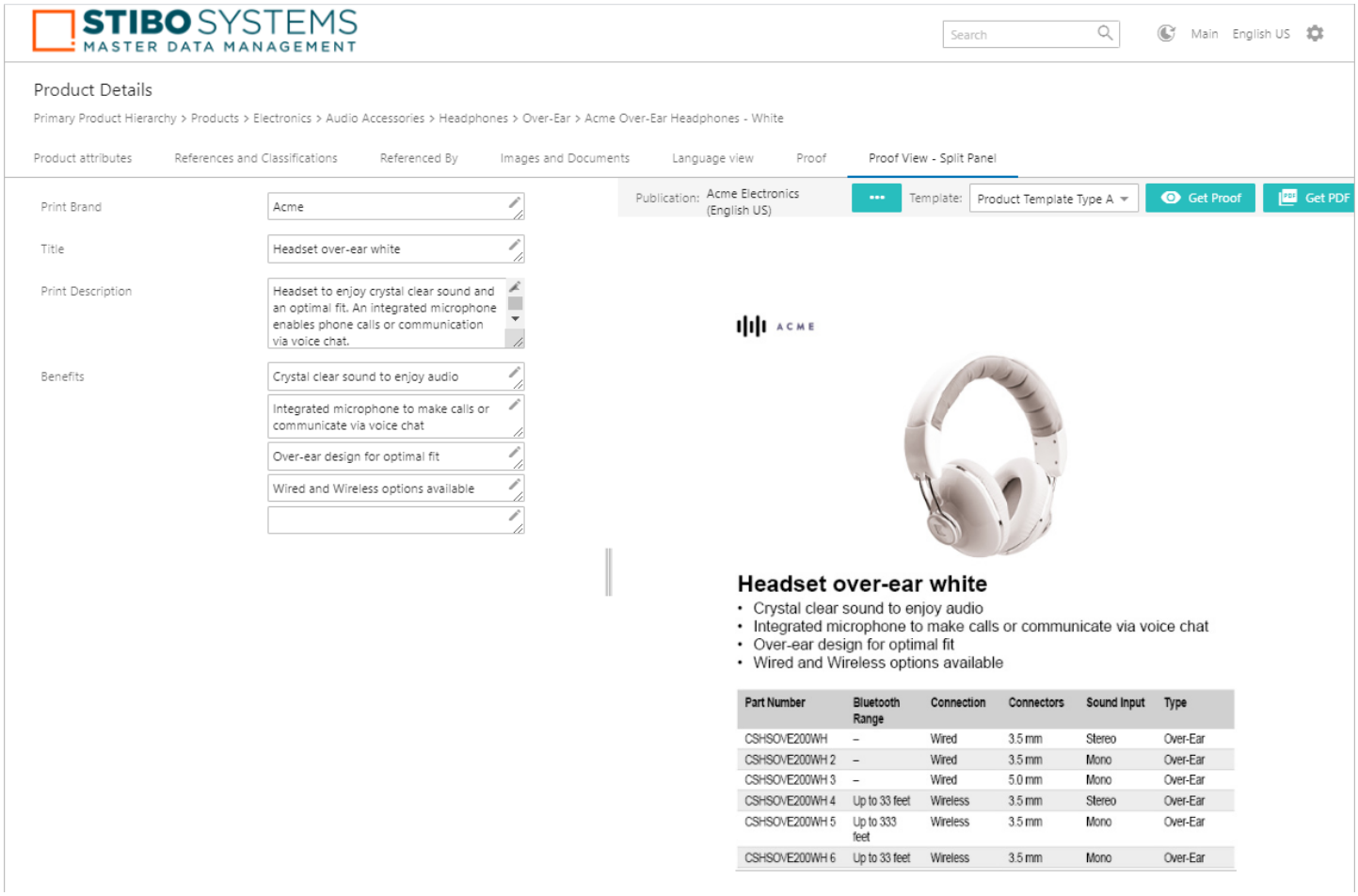
Configuring the Web UI Proof View Component

The Proof View Web UI component is used to display print layouts for product objects and is optimized for use on a Node Details page, either alone on a Sub Screen Tab Page or on a Tab Page with a child tab component of Border Panel or Draggable Split Panel. The non-draggable Split Panel can also be used, but the Draggable Split Panel is recommended to optimize viewing of proofs, which should be viewed with the largest amount of screen space available.

The following screenshot shows an example of a product proof view on a Tab Page child of a Node Details screen. The proof uses a full-page product template that includes a primary product image, three secondary product images, a table, and other elements such as a brand logo and feature bullets.

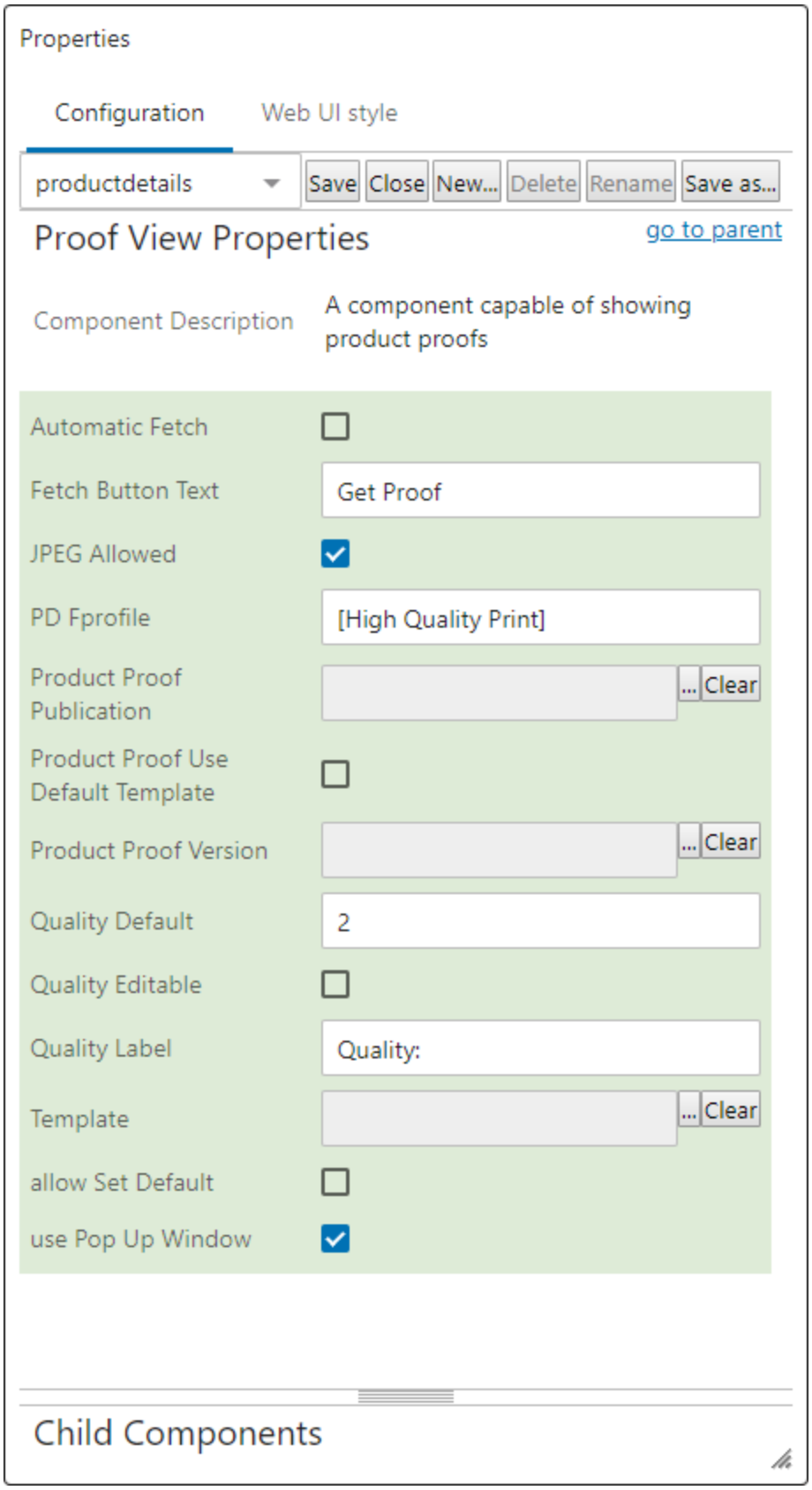


The next screenshot shows a product proof view configured on the right side of a Draggable Split Panel screen. An attribute group value component is configured on the left side, which displays the attributes used in the proof and allows users to edit them. A different product template is used in this example than in the previous example; only a single image is used, but other elements such as brand logo and feature bullets are still present. The layout is also different; it is configured for a single column instead of an entire page.



Proof View Component Configuration

A number of parameters must be configured in the Web UI designer to determine the behavior and appearance of the proof view. Each parameter is described in detail below the following screenshot.


Properties
Configuration
Web UI style
productdetails
Save
Close
New...
Delete
Rename
Save as...
Proof View Properties
go to parent
Component Description
A component capable of showing product proofs
Automatic Fetch
Fetch Button Text
Get Proof
JPEG Allowed
PD Fprofile
[High Quality Print]
Product Proof Publication
Clear
Product Proof Use Default Template
Product Proof Version
Clear
Quality Default
2
Quality Editable
Quality Label
Quality:
Template
Clear
allow Set Default
use Pop Up Window
Child Components

- **Automatic Fetch:** Select this parameter to have the proof view automatically 'fetch' from the InDesign server when the page is loaded. When proofs are automatically fetched, the 'Get Proof' button will not display. (If the 'JPEG Allowed' option is disabled, users will instead receive a PDF rendering of the proof, and the 'Get PDF' button will not display either. The JPEG Allowed option is detailed further below in this list.)

  At least one of the following parameters must be configured to enable automatic fetch:

  - Product Proof Publication
  - Product Proof Version
  - Template

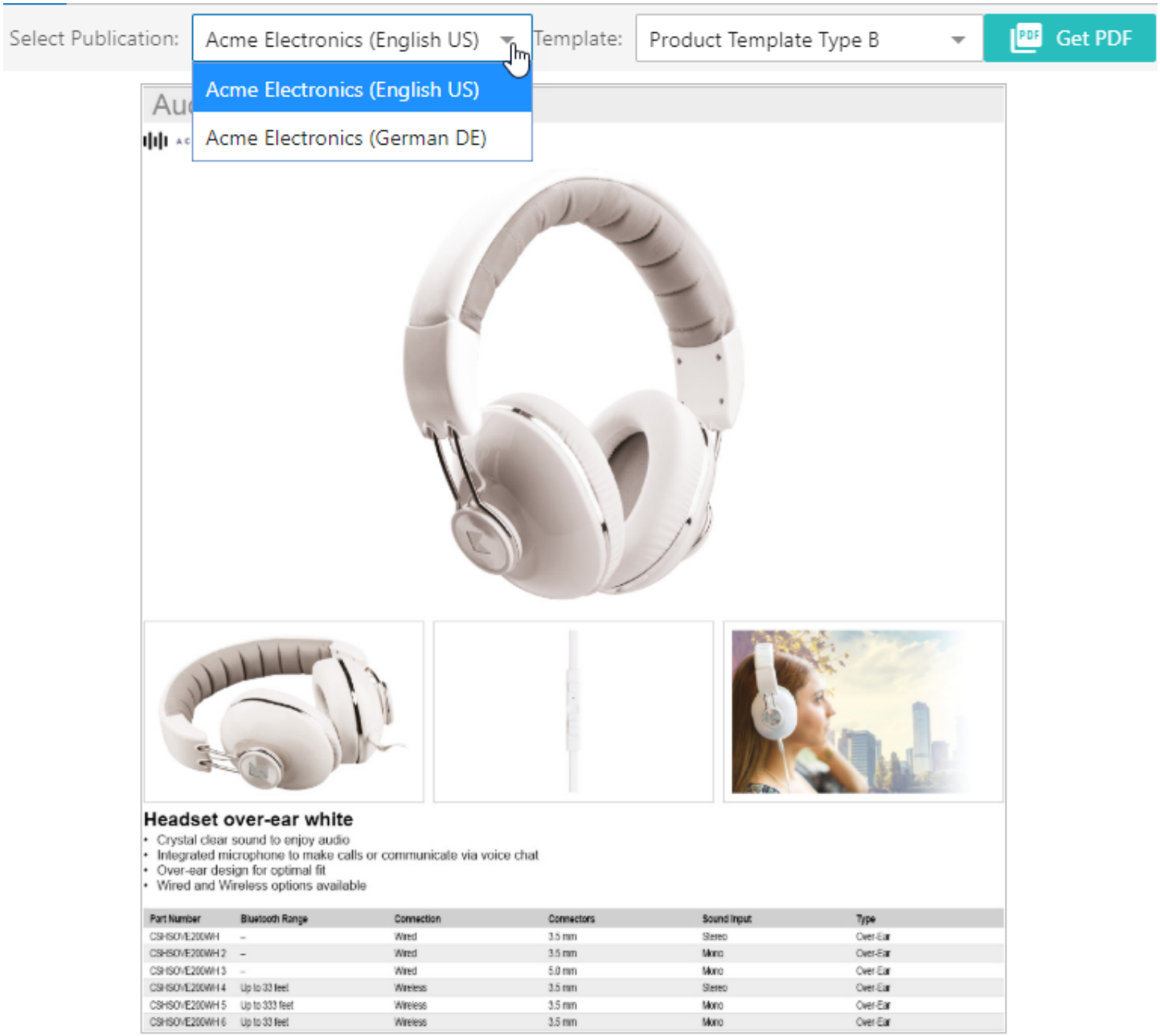
  If both **Product Proof Version** and **Template** are configured, users will not be able to choose which version or layout (product template) to use for the proof.

  > **Note:** When 'Product Proof Version' is chosen, **Product Proof Publication** can be left blank, since the publication is automatically included when one of its versions is selected.

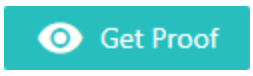
  If **Product Proof Publication** is selected but no version is selected for **Product Proof Version**, then the publication version that comes first alphabetically in the publication will be chosen for the proof when the page loads. For example, English will be chosen over German if these are the only two versions. If no product template is chosen for **Template**, the product template linked to the publication first alphabetically will be selected. For example, a product template named 'Arts and Crafts' will be selected over a template named 'Electronics.' If a default InDesign template has already been applied to the product, however, the default template will display first in the dropdown.

  Despite the automatic selection, users will still have the option to manually choose a version and/or template from dropdown menus. This allows users to toggle between different versions and/or layouts for the same publication without having to manually click the 'Get Proof' button.

  The following screenshot shows how the proof view component looks with only **Product Proof Publication** configured. Users do not have to manually choose a publication, but they have the option to choose a publication version and template.



- **Fetch Button Text:** Enter the text that you would like to be displayed on the 'fetch JPEG proof' button. The default value is 'Get Proof.'

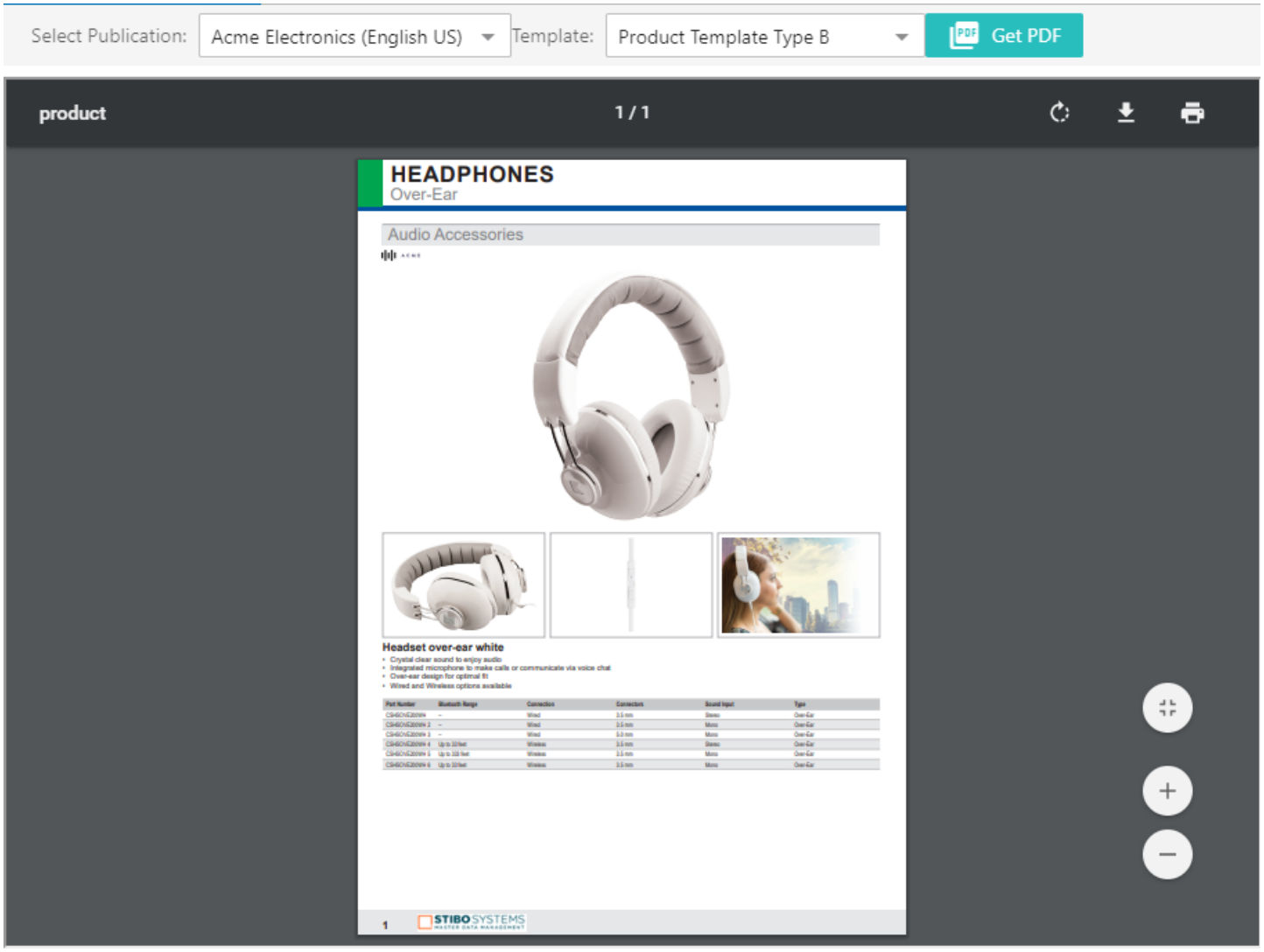


- **JPEG Allowed:** Check this box to allow users to request a JPEG proof, i.e., to display the 'Get Proof' button.

  A JPEG proof is what is fetched from the InDesign server for viewing basic proofs in the Web UI. JPEG renderings display the elements driven by the product template (e.g., layout, images, tables, etc.), but none of

the 'furniture' provided by the publication template (e.g., page numbers, headers, footers and other static design elements).

If JPEG Allowed is *unchecked*, a PDF profile must be specified. The InDesign server will then render full PDFs for viewing, as shown in the below screenshot. PDF renderings *do* show static elements from the publication template, which may be preferable to JPEG proofs for users who want a more accurate view of how the finalized page will look.



If JPEG Allowed is disabled *and* Automatic Fetch is enabled, a PDF will automatically display when the page is loaded. If Automatic Fetch is *not* enabled, users will need to click the 'Get PDF' button to view the PDF.

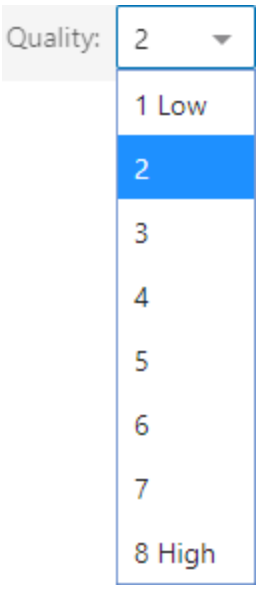
- **PDF Profile:** The PDF profile to use. If blank, then the PDF option is disabled. In InDesign, a PDF profile is referred to as a **PDF Preset**, which is a configuration file that contains a series of options that define how a PDF file should be created. If a PDF profile is not specified, then JPEG proofs must be allowed.

Note: PDF profiles are system dependent. For more information on PDF Profiles, see the **Setting up PDF Profiles (Presets) for the InDesign Server** topic in the **STEP Publisher** documentation. Additional information can be found on the web at https://helpx.adobe.com/indesign/using/pdf-options.html.

- **Product Proof Publication:** Click the ellipsis button (...) to select the publication to use for product proof views. Leave this option blank to allow users to choose the publication. This option can also be left blank if the **Product Proof Version** option is configured, since the publication is automatically included when one of its versions is selected.
- **Product Proof Use Default Template:** Select this parameter to have the proof view use the default product template applied to the product in STEP. For information on default product templates, see the **Default InDesign Product Templates** topic in the **STEP Publisher** documentation. Users can also apply a default product template to a product from the Web UI by using the 'Set as default' button on a proof view page, which becomes visible on a page when the 'Allow Set Default' option is checked in the designer for the Proof View component. This option is detailed later in this bullet list.
- **Product Proof Version:** Click the ellipsis button (...) to select the publication version to use for product proof views. Leave this option blank to allow users to choose the version.

Note: If this option is selected, the **Product Proof Publication** option should be left blank, since choosing a publication version automatically includes the related publication. Additionally, choosing a publication version from a publication different than the one chosen for Product Proof Publication will likely result in invalid or unviewable proof views.

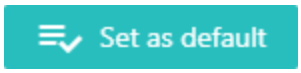
- **Quality Default:** The default quality factor for the JPEG proof, which is a number between 1 (lowest) and 8 (highest). Leave blank to use the system default of 2.
- **Quality Editable:** Selecting this option will display a 'Quality' dropdown list, allowing users to change the quality factor of the displayed JPEG proof.



- **Quality Label:** Label to display for the quality control dropdown. The default is **Quality:**.
- **Template:** Click the ellipsis button (...) to select the product template that will be used for the proof view. Leave this option blank to allow users to choose the template.

  Note: Even though this option will let you select any product template, the template should be linked to the publication that was selected for the 'Product Proof Publication' and/or 'Product Proof Version' parameters. Choosing a template that is not linked to your publication will likely result in invalid proof views.

- **Allow Set Default**: Selecting this option will cause the 'Set as default' button to display, which allows users to apply a default product template to the product being viewed in the proof view. The default template selection made from the Web UI also sets the default product template on the product in the workbench.

  Note: If there is already a default product template assigned to the product, clicking **Set as default** will overwrite the previously chosen template.

- **Use Pop-up Window:** Select this option to have the generated PDF display in a browser pop-up window instead of within a frame on the page. If your browser has been configured to block pop-up windows, the PDF will not display in a pop-up window, but will instead download automatically.

Choosing a Proof View Start Page

A proof view can either be started on page 1, for a right-hand page, or page 2, for a left-hand page. To choose the starting page number, the **Proof View Start Page Number** setting in System Settings (located under System Setup > Users and Groups > DTP Settings) must be set to either 1 or 2. By default, proof views begin on page 2. However, a selection of '1' is useful, for example, when producing documents for PDF output, such as data sheets, which may not be produced in a 2-page spread format and should start page numbering at 1. For more information, see the **DTP Settings** topic in the **System Settings** documentation.

Generating Proof Views and PDFs in Web UI

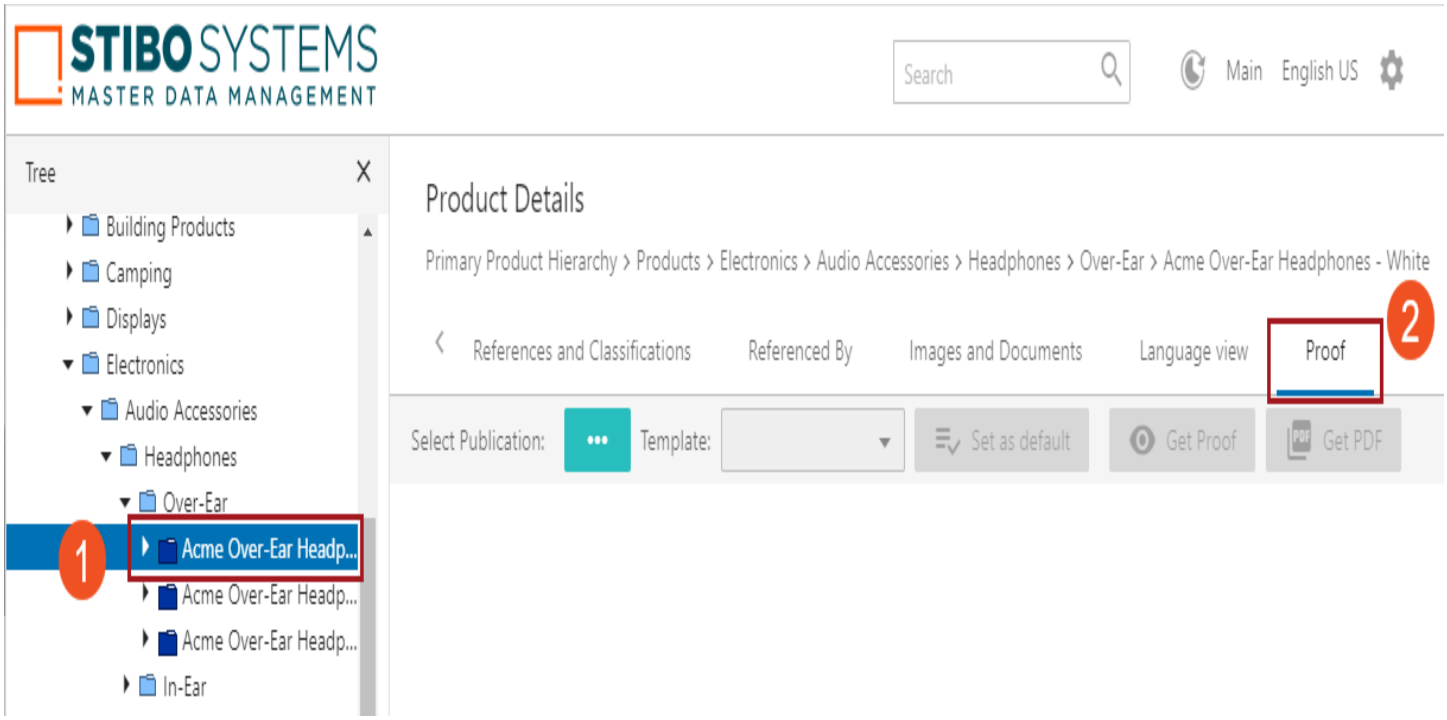
The exact steps for accessing Proof View functionality in the Web UI depend on where and how the Proof View component has been configured in the Web UI. The process described in this topic assumes that:

- The Proof View component has been configured as a Tab Page on a Node Details page.
- A publication, version, and template have *not* been selected in the Proof View Web UI designer. As such, the user is responsible for manually selecting the publication, version, and template to view a proof.
- Automatic Fetch has *not* been selected in the Proof View Web UI designer, meaning that the user must click Get Proof to view a proof.
- A PDF profile has been provided in the Proof View Web UI designer, allowing the 'Get PDF' button to display.

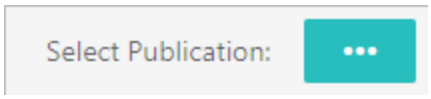
If different options have been selected in the designer, then some of the below steps will not apply. For example, if 'Automatic Fetch' has been enabled and a publication, version, and template have been selected, then the user will not need to make any manual selections or click 'Get Proof'; the proof will display when the page loads. If a PDF profile has not been provided, then the 'Get PDF' button will not be available. For details on other available configuration options, see the **Configuring the Web UI Proof View Component** topic.

Viewing a Product Proof

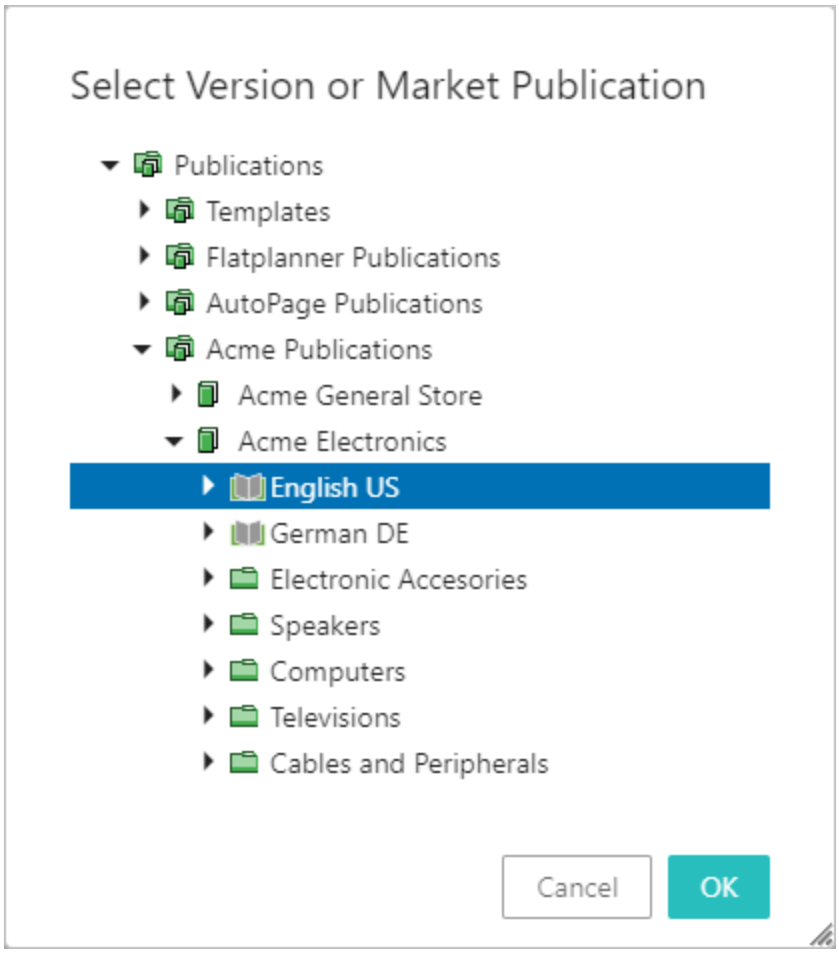
1. Select a product in the **Tree** navigator, then click on the **Proof** tab.



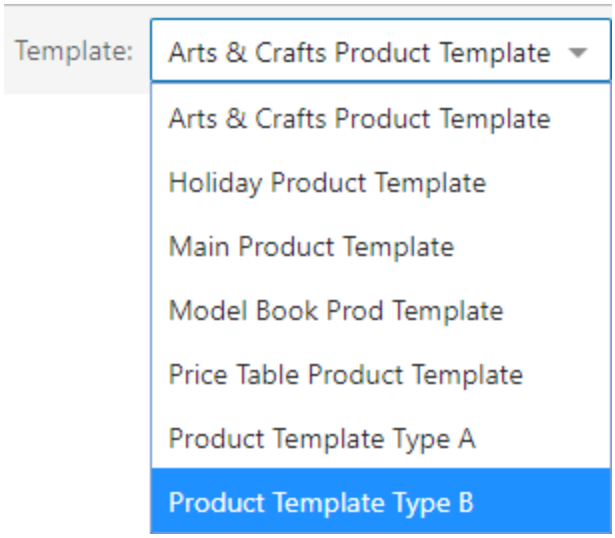
2. Click the ellipsis button next to **Select Publication**.



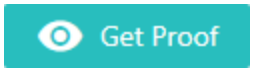
3. The **Select Version or Market Publication** dialog displays. Navigate to the relevant publication, then expand it and choose the relevant version, e.g., English US.



4. Click the **Template** dropdown list, then select a product template. Only product templates that have been linked to the selected publication will be available.



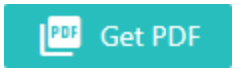
5. After selecting the template, click **Get Proof**.



The JPEG proof can be zoomed in or out by placing the cursor over the image and using the mouse scroll wheel.

Generating a PDF

1. Click **Get PDF** to download a PDF generated on-the-fly from the same publication version and template chosen for the proof view. Though only the first page of the JPEG proof view displays in the Web UI, a PDF with multiple pages can be generated.



Unlike the basic JPEG proof, all template 'furniture' from the publication template will be present in the generated PDF; for example, headers, footers, page numbers, and other static background elements. In the below image, these elements include the 'Headphones Over Ear' header, the gray 'Stibo Systems' footer, and the page number.

HEADPHONES
Over-Ear

Audio Accessories

ACME

Headset over-ear white

- Crystal clear sound to enjoy audio
- Integrated microphone to make calls or communicate via voice chat
- Over-ear design for optimal fit
- Wired and Wireless options available

Part Number	Bluetooth Range	Connection	Connectors	Sound Input	Type
CSHSOVE200WH	–	Wired	3.5 mm	Stereo	Over-Ear
CSHSOVE200WH 2	–	Wired	3.5 mm	Mono	Over-Ear
CSHSOVE200WH 3	–	Wired	5.0 mm	Mono	Over-Ear
CSHSOVE200WH 4	Up to 33 feet	Wireless	3.5 mm	Stereo	Over-Ear
CSHSOVE200WH 5	Up to 333 feet	Wireless	3.5 mm	Mono	Over-Ear
CSHSOVE200WH 6	Up to 33 feet	Wireless	3.5 mm	Mono	Over-Ear

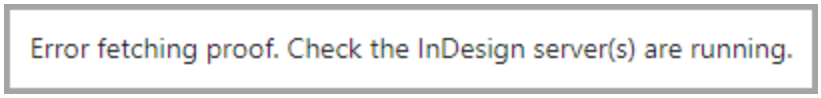
1 STIBO SYSTEMS

Proof View Troubleshooting

Some of the most common errors encountered when generating proof views and PDFs from the Proof View component are listed below.

Cannot Fetch Proof

If you cannot generate a proof view or PDF, you will typically receive an 'Error fetching proof' message like this one:



If you receive this error, one of more of the following issues may be the cause:

- Your STEP system is not connected to an InDesign server.
- Your InDesign server sidecar is offline, or one or more renderers on your InDesign server may be offline.
- There is a version mismatch between the InDesign client on which you created your templates and the InDesign server that is generating the proofs. If the client is at a higher level than the server, the proofs will not fetch. For example, if you are using templates that were created using a CC 2020 version of InDesign but your InDesign server is running on CC 2017, then proof views will not be fetched because the server cannot open the templates.

  See the **InDesign Queues** topic for more information on monitoring and troubleshooting the InDesign server.

- Missing or incorrectly configured Proof View system configuration properties. Typically, configuration properties are not required for proof views, but they may be needed in certain instances.

  One such scenario is if SSL is activated on your system. If so, then the following properties must be added to your sharedconfig.properties file. If you are not using SSL on your system, these properties are not needed. (Note that the values provided after the = sign below are sample values only.)

  ```
  Portal.Publishing.ProxyPort=443

  Portal.Publishing.ProxyHost=https://aws-poc3.scloud.stibo.com

  Portal.ProofView.ProxyPort=443

  Portal.ProofView.ProxyHost=https://aws-poc3.scloud.stibo.com
  ```

  Another instance in which proof view configuration properties may be needed is to control how PDFs display in Web UI proof views. See the below subsection 'PDF Does not Display or Download in Web UI' for more information.

Additional proof view configuration properties and their descriptions can be viewed on the Configuration tab of your Admin Portal. For more information, see the **Configuration** topic in the **Administration Portal** documentation.

Images not Visible in Proofs / PDFs

If you cannot see images in your proof views, one or more of the following issues may be the cause:

- The asset push sidecar is not running. For more information, see the **Asset Push Sidecar** topic in the **Asset Push** section of the **Digital Assets** / **Exporting Assets** documentation.
- Images have not yet been pushed to the asset location via asset push. For more information, see the **Starting the Asset Push Process** topic in the **Asset Push** section of the **Digital Assets** / **Exporting Assets** documentation.
- The Asset Push Configuration is incorrectly configured. For example, all image files will not be pushed with **image** MIME types. EPS files will not push unless the MIME type of **application**/postscript is added to the asset push configuration, and Adobe Illustrator files will not push unless the MIME type of **application**/illustrator is added. For more information on asset push, see the **Asset Push** section of the **Digital Assets** / **Exporting Assets** documentation.
- The link to the asset push location is incorrect in the dtp-server.properties file, or the AssetPush.DTPConfiguration properties are incorrect in the sharedconfig.properties file. See the **Linking to an Asset Location** topic in the **STEP Publisher** documentation for more information.
- Missing or incorrect image tags in product template.

PDF Does not Display or Download in Web UI

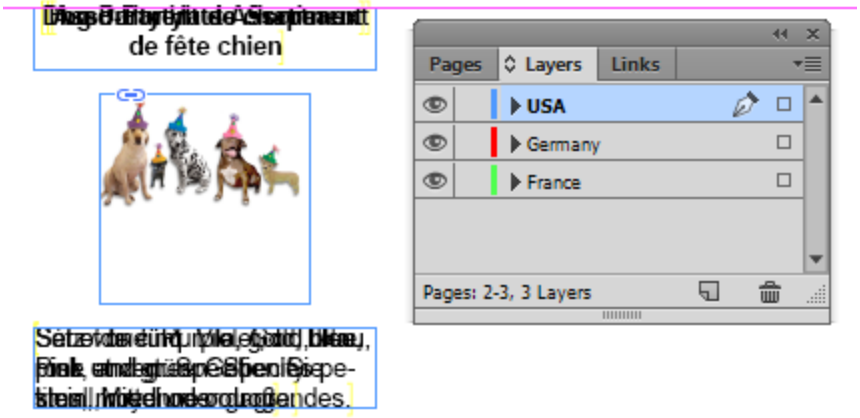
- If your browser has been configured to block pop-up windows, the PDF will not display in a pop-up window.
- If the PDF does not display or automatically download, check your browser settings and/or system configuration properties.

  If the configuration property `Portal.Security.ResponseHeader.XFrameOptions` is set to `DENY` (the default), then the PDF will always be displayed in a pop-up. To always display the PDF in a frame within the proof view, deselect the 'Use Pop-up Window' checkbox and set `XFrameOptions` to `SAMEORIGIN`. However, configuration properties are typically not needed to generate and display PDFs in proof views,

Working With Version Layers

This documentation section describes how to work with version layers when creating publications in STEP Publisher. Both the STEP database and STEP'n'design are capable of supporting multi-dimensional product data. In STEP publications, these multi-dimensional views are configured as publication **versions** and are typically modeled around specific language and country views of data. Versions may also be created to support currency zones, vertical markets, or different types of catalogs. Therefore, product data in STEP must be organized into different versions in a publication.

The following image shows an example of a product mounted in three languages simultaneously onto the same InDesign page. Each layer in the InDesign document corresponds to a publication version. Since all three layers are made visible with the eye icon on the left of the layer, they will appear overlapping. In use, only one language will show based on the current context.



This topic assumes the following:

- Basic understanding of standard InDesign layers functionality
- An understanding of publication versions (see the **Publication Versions** topic in the **Publication Maintenance** documentation for more information)

Note: Version layers do not apply to page templates.

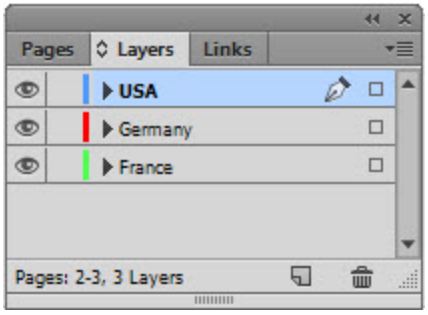
Using Version Layers

Layers are used typically for 'black plate' language and pricing content. For example, an English US layer will contain US English textual content; a French layer will contain French content, and so on. Layers are most commonly used with publications created in Flatplanner and AutoPage, although layers may also be used for standard STEP Publisher ('drag and drop') publications. Layers are useful for mounting all language versions at once, in order to save time on manual duplication of layers or creating multiple publications for different languages.

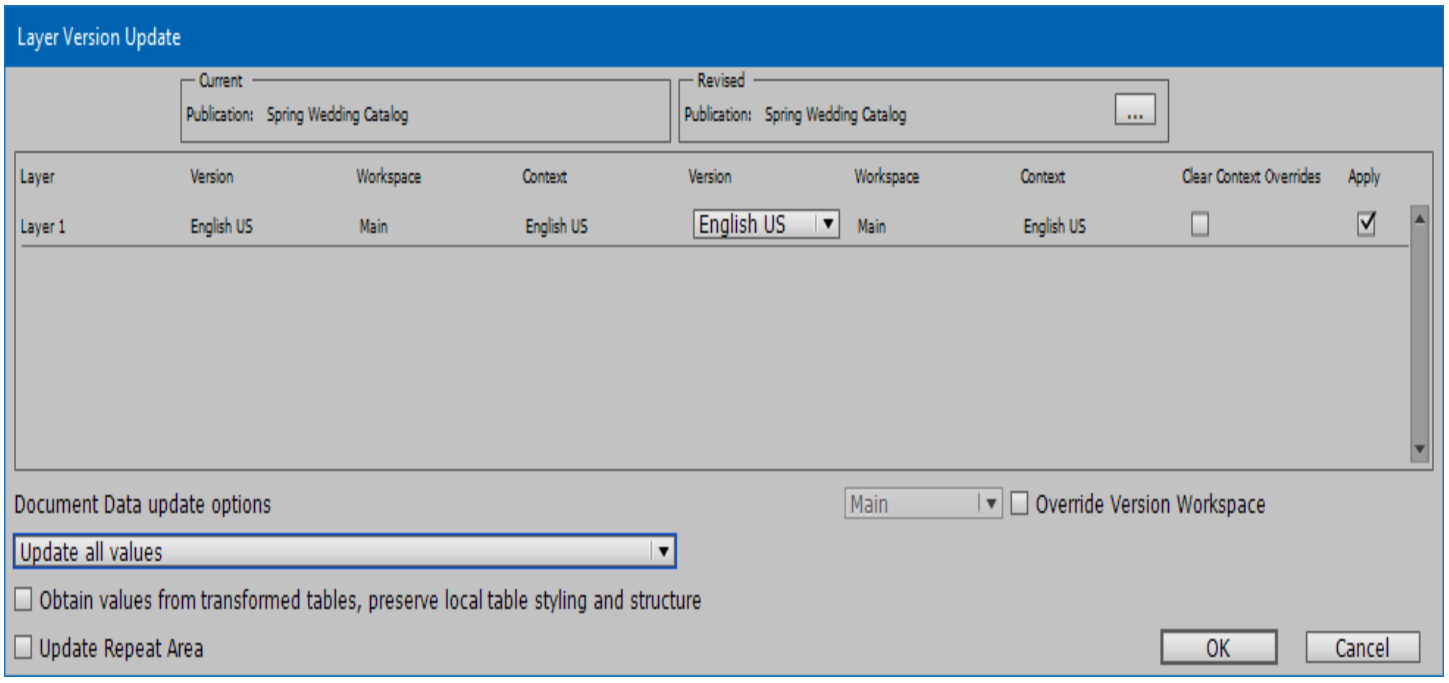
However, all layers do not need to be mounted at once. A single layer can be mapped first, e.g., US English. Then, as translated content becomes available, the layer can be duplicated, and the content on the duplicated layer can be updated using Layer Version Update in order to replace all the US English content with content from another language, e.g., French.

Viewing Version Layers

From within InDesign, you can inspect the different versions you will be mounting by clicking the **Layers** tab (Window menu/Layers or F7). Each version has its own layer (see example in illustration below). If multiple versions share a layer, you will still only see one layer, as this will match the name in the layer mapping.



Likewise, you can see how STEP'n'design knows which STEP context is mounted on a layer, by clicking **Layer Version Update** in the **STEP** menu.



Creating Layers in Templates

In order to work with multi-dimensional data in STEP Publisher, both **product templates** and **publication templates** must be configured with InDesign **layers**. Standard practice is for there to be a 1-to-1 relationship between publication versions and layers. Though less common in modern printing, a single layer may also be designated as the repository for product images, while the additional layers each correspond to publication version but contain black text only. This is to accommodate what is known in the printing industry as 'fifth-black' plate change.

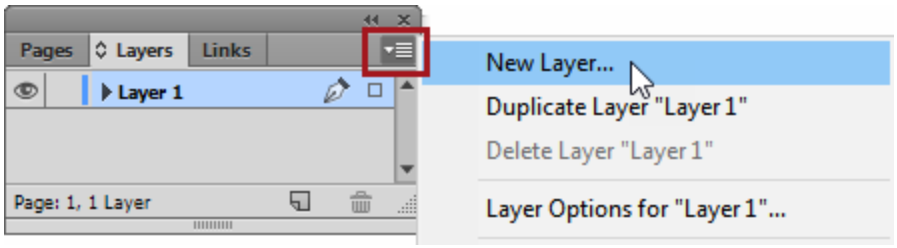
Note: Version layers do not apply to Flatplanner **page templates**.

Creating a New Layer

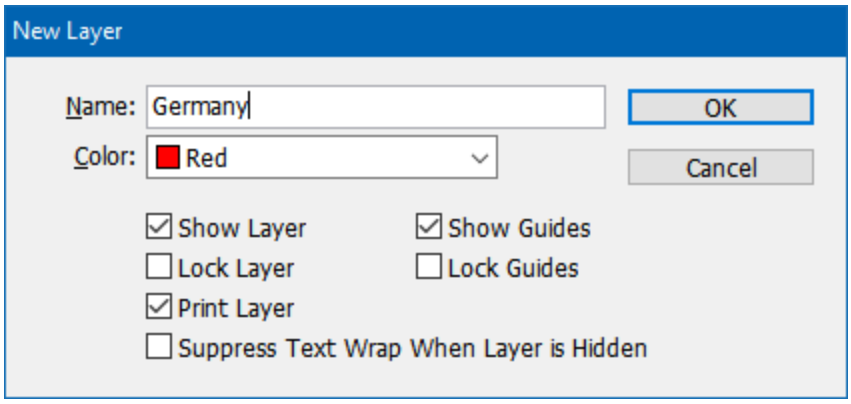
The process for creating a new layer is identical for both product templates and publication templates since both are standard InDesign documents. The following steps describe standard InDesign functionality.

By default, all new InDesign documents already have one layer defined called 'Layer 1'. In order to define additional layers, either new layers must be created, or the original layer can be duplicated.

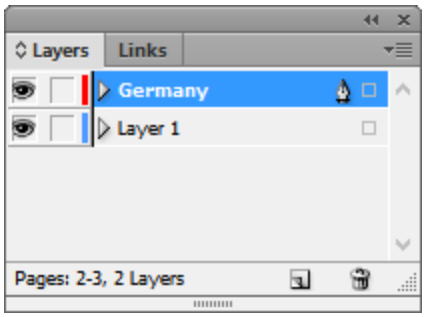
1. Open your product template in InDesign.
2. In InDesign, navigate to Window > **Layers** (or click F7) to open the InDesign **Layers** panel.
3. On the Layers panel, expand the Options menu and click **New Layer**. Or, right-click on the layer name and select **New Layer**.



4. In the **New Layer** dialog, type the name for the new layer In the **Name** field.



5. To change the color of the layer, select a color from the **Color** dropdown. The layer color determines what color the frames will appear on your layer. Recommended practice is to have a different color for each layer so they can be easily differentiated.
6. Click **OK** to close the New Layer dialog and finish creating the layer.

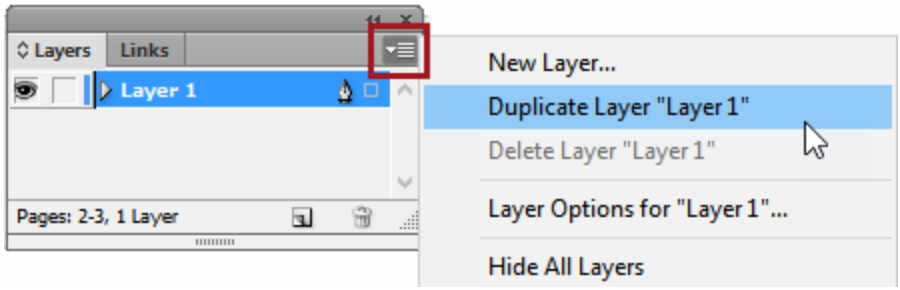


Duplicating a Layer

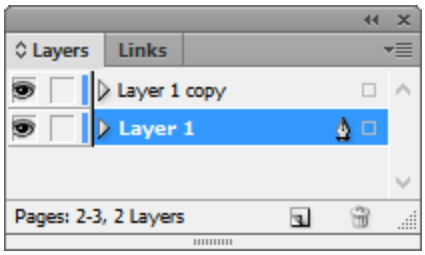
Duplicating a layer follows a similar process to creating a new layer. You may choose to duplicate a layer either as an alternative to creating a new layer or as a method to copy all contents of a layer that already contains mounted products. A layer with preexisting mounted content can be duplicated so that the duplicated pages can then be updated with content from a different publication version. For more information on this, see the **Changing a Version Layer** topic for more information.

To duplicate a layer:

1. Open your product template in InDesign.
2. In InDesign, navigate to Window > **Layers** (or click F7) to open the InDesign **Layers** panel.
3. On the Layers panel, expand the Options menu and click **Duplicate Layer**. Or, right-click on the layer name and select Duplicate Layer.



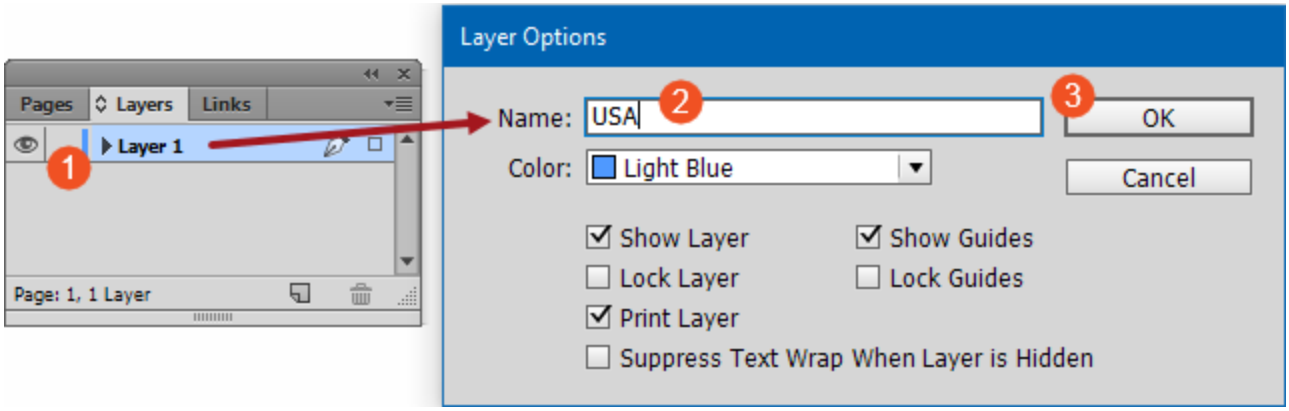
4. The layer is duplicated.



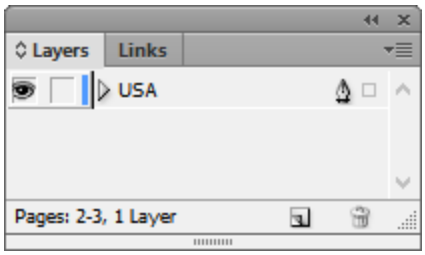
Changing the Name of a Layer

The process for renaming a new layer is also identical for both product templates and publication templates since both are standard InDesign documents. The following steps describe standard InDesign functionality.

1. Open your product template in InDesign.
2. In InDesign, navigate to Window > **Layers** (or click F7) to open the InDesign **Layers** panel.
3. Double click on the layer name (in this example, Layer 1) to open the **Layer Options** dialog.
4. Type the new name for your layer in the **Name** field, then click **OK**.



5. The layer is renamed.



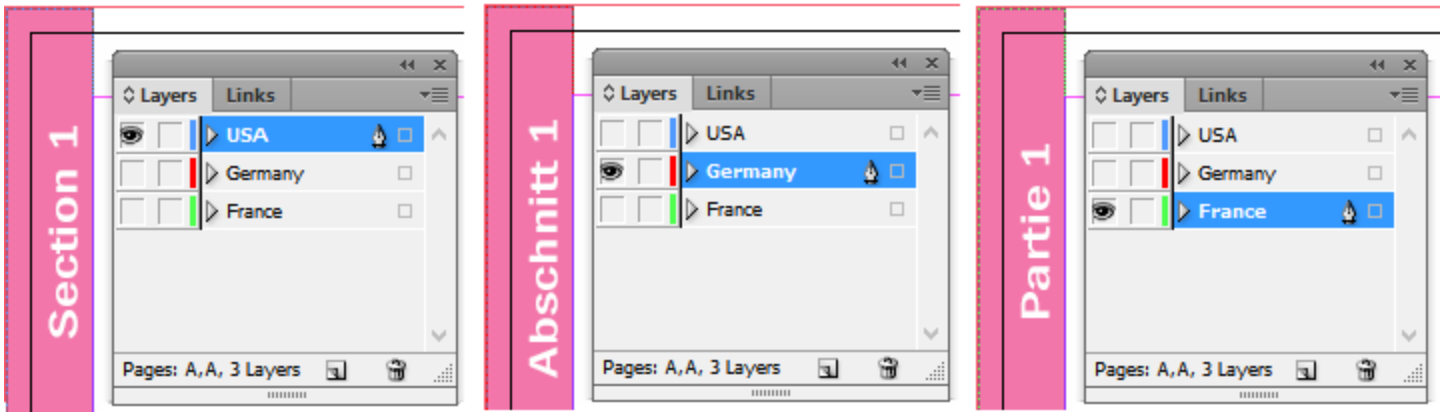
Layers in Publication Templates

When mounting multiple versions onto a publication template, it is not always required to have layers set up on the template beforehand. Layers from the **product template** will be copied across the publication template during product mounting.

However, if you need translated content in the 'furniture' of the publication template—meaning the background elements on the page that are not placed through the product template, such as text on side tabs—then the layers must already created in the publication template.

The below screenshot shows three views of the same side tab on a publication template as it appears on an English, a German, and a French layer. In this example, the content is not populated by STEP—it is already on the publication template.

To view an individual layer, click the box in the first column next to the layer to view. The eye icon will display to indicate that the layer is visible. To hide the layer, click the eye icon to make it disappear.



It is possible to populate publication template background elements with content from STEP by using STEP tags on the publication template, but this can only be done using Flatplanner or AutoPage. For more information, see **Using the 'getInheritedPublicationValue' Function in Flatplanner** in the **Flatplanner** documentation and **Using the 'getInheritedPublicationValue' Function in AutoPage** in the **AutoPage** documentation.

Considerations for Layers in Publication Templates

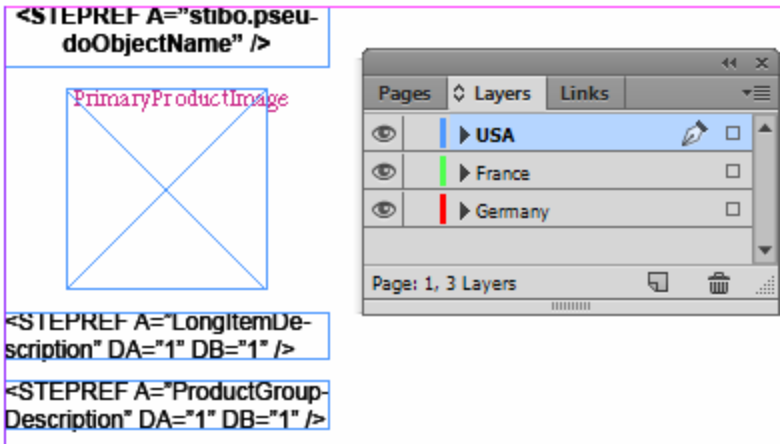
Even though it is not mandatory to create layers on publication templates, it is recommended to do so to avoid any future errors caused by keeping the 'Layer 1' (default layer). When mounting a Flatplanner page or a product

onto the publication template using a product template that contains layers, the system creates the same layers as those on the product template, but the mounted document will retain the default layer 'Layer 1,' as pictured below:

Layers in Product Templates

When mounting multiple publication versions at one time (typically in Flatplanner and AutoPage), it is mandatory that product templates contain layers. As stated in the previous section of this topic, layers in *publication* templates are not always required since the layers from the product template will be copied across to the page when mounting. In other words, when a document is mounted using a product template that contains layers, the same layers will be automatically created in the publication template.

Note that if you are using drag-and-drop to mount a product onto a page using a product template with layers—and the publication template does *not* have layers—all layers will be automatically be created on the publication template, but the content from the publication version that you are working with will be mounted on *all* of the layers. For example, if your product template has three layers (USA, France, and Germany), and you are working with the USA (English) context, the three layers from the product template will be created in the publication template, but the English content will go on all three.

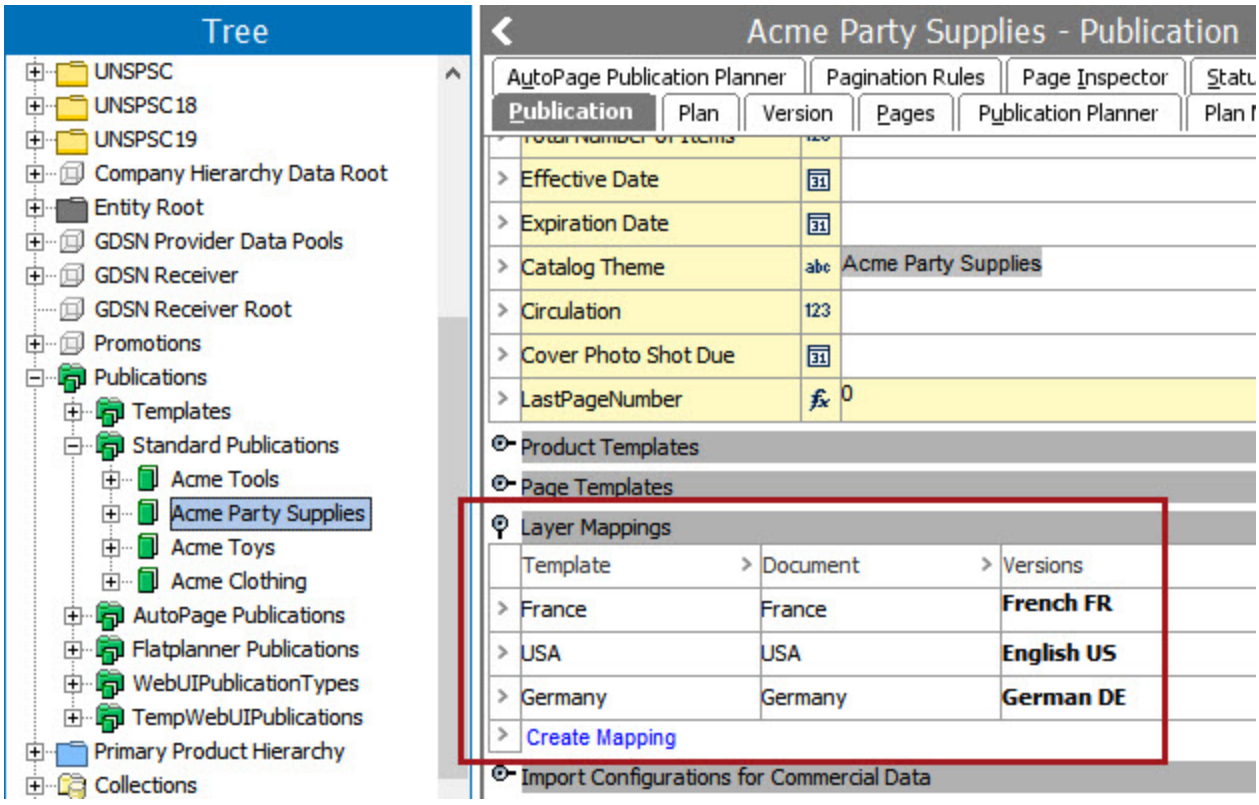


Mapping Versions to Layers

If you plan to set up a publication in which you would like all publication versions to mount onto the InDesign publication template / mounting page at the same time, you must define which layer each publication version will placed onto. This definition is accomplished through **Layer Mappings**. Layer mapping is required when the intent is to mount multiple versions onto multiple layers at one time and applies to multi-versioned publications created with any STEP Publisher component—STEP Publisher (drag and drop), Flatplanner, and AutoPage.

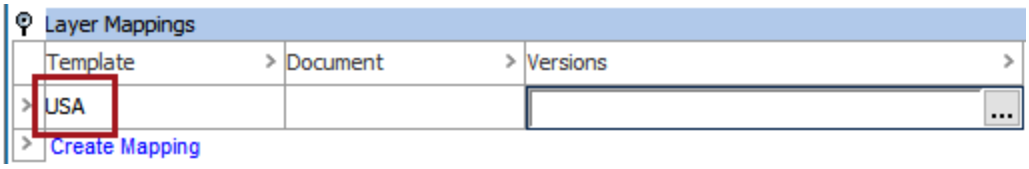
The following screenshot shows a publication with three mapped versions.

Note: If you have a single-version publication, you do not need to create layer mapping.

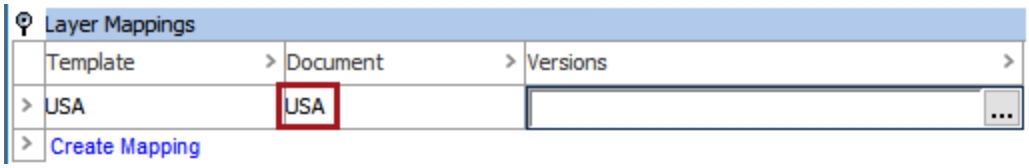


Steps to map publication versions to layers are as follows:

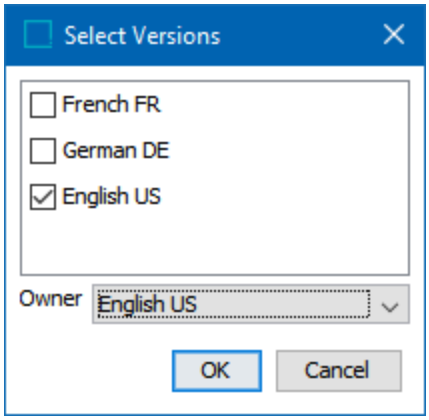
1. In the Tree, navigate to the relevant publication, then click the **Publication** tab.
2. Expand the **Layer Mappings** section, then click 'Create Mapping.'
3. In the blank row that is created after clicking 'Create Mapping,' enter the name of one of the layers from your **product template** in the **Template** column. This field is case sensitive.



4. In the **Document** column, enter the name of the corresponding layer in the publication template / mounting document. Recommended practice is for the names of the layers to match on both templates. If the publication template does not already have layers, the layers will be created from the product template when a product is mounted. The created layers will be given the names provided in the layer mapping.



5. In the **Versions** column, click the ellipsis button (...).
6. Select the relevant version(s) in the **Select Versions** dialog.



7. By default, the selected version will also be the *owner* of the layer. If you map more than one version to a layer, you must designate one of these versions as the owner from the **Owner** dropdown list. See the following section of this topic for more information on layer ownership.
8. Click **OK**.
9. To create more layer mappings, repeat steps 1-8.

Versions Owning Layers

In almost all cases, when mapping publication versions to InDesign page layers, there is a 1-to-1 relationship between publication versions and layers. The concept of a version 'owning' a layer is related to the idea of the 'fifth black plate' change print process that can be used to reduce print costs.

Note: The Owner is the version that will be used when mounting in InDesign. However, content on the layer is shared by the other versions that are mapped to it and will appear in the PDF output of the document.

In commercial printing, color printing presses produce pages using four plates, with each plate containing a different color of ink—Cyan, Magenta, Yellow, and Black (referred to as CMYK). Publishers use a 'fifth black' color when the text and/or prices are different for each publication version. It is more cost-effective for publishers to first print their books using the CMYK process but excluding the text. Then the publications are 'overprinted' with a fifth black plate that contains only the text portion, and a different fifth black plate is used for each text version.

Since most printing houses these days have the ability to separate these layers digitally from PDFs, it is not a requirement to map version layers in STEP to precisely match the way the printer will create the fifth black plates. Specifically, it is OK if color elements (such as images or background colors) are included in every layer of the InDesign document (and subsequently the PDF that is created from it), as long as these elements are placed in an identical location within each layer.

The following use cases describe more traditional layer mappings based on the idea of mapping text ('fifth black') to separate layers than images.

'Fifth Black' Use Cases

A basic use case for 'fifth black' layer mapping is as follows:

A catalog is being produced in both the U.S. and the U.K. The desired layers are:

- An **image** layer with the same color pictures in both countries
- A US **text** and **price** content layer
- A UK **text** and **price** content layer

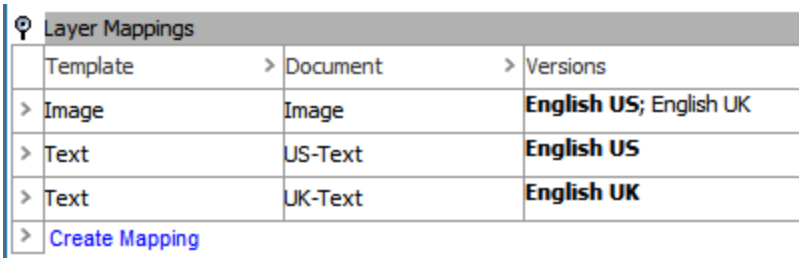
In this instance, the **product template** would have two layers:

- Image Layer
- Text Layer (which contains your region text as well as the price)

The layer mapping would be as follows. Note that a single layer from a product template—in this case, **Text**—can be mapped to mount onto more than one layer in the publication template.

Template	Document	Owner version	Other Version
Image	Image	US	UK
Text	US-Text	US	
Text	UK-Text	UK	

The layer mapping in this example will resemble the following. Versions that own the layers are in **bold** text.



Layer Mappings

Template	Document	Versions
Image	Image	**English US**; English UK
Text	US-Text	**English US**
Text	UK-Text	**English UK**
Create Mapping		

A more complex use case for 'fifth black' layer mapping is as follows:

A catalog is being produced in both France and Germany. The desired layers are:

- An **image** layer with the same color pictures in both countries
- A German **text** content layer
- A French **text** content layer
- A Euro **price** layer

In this instance, the **product template** would have three layers:

- Image Layer
- Text Layer
- Price Layer

The layer mapping would be as follows. Note that a single layer from a product template—in this case, **Text**—can be mapped to mount onto more than one layer in the publication template.

Template	Document	Owner version	Other Version
Image	Image	DE	FR
Text	DE-Text	DE	
Text	FR-Text	FR	
Price	Price	DE	FR

The layer mapping in this example will resemble the following.

Layer Mappings

Template	Document	Versions
Image	Image	**German DE**; French FR
Text	FR-Text	**French FR**
Price	Price	**German DE**; French FR
Text	DE-Text	**German DE**
Create Mapping		

Mounting Products to Version Layers

One advantage to using version layers in a publication is the ability to mount content from all publication versions in one operation. This is typically only used for Flatplanner and AutoPage publications, but multiple versions can also be mounted in one operation using the standard 'drag-and-drop' functionality of STEP Publisher.

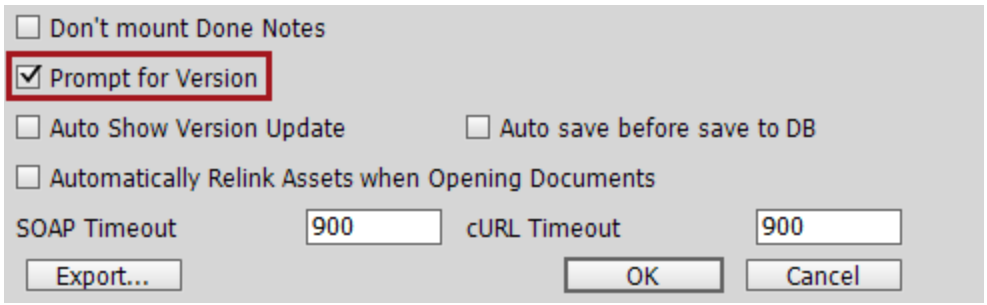
Layers are useful for mounting all language versions at once in order to save time on manual duplication of layers or creating multiple publications for different languages.

However, all layers do not need to be mounted at once. A single layer can be mapped first, e.g., US English. Then, as translated content becomes available, the layer can be duplicated, and the content on the duplicated layer can be updated using Layer Version Update in order to replace all the US English content with content from another language, e.g., French. All methods require layer mapping.

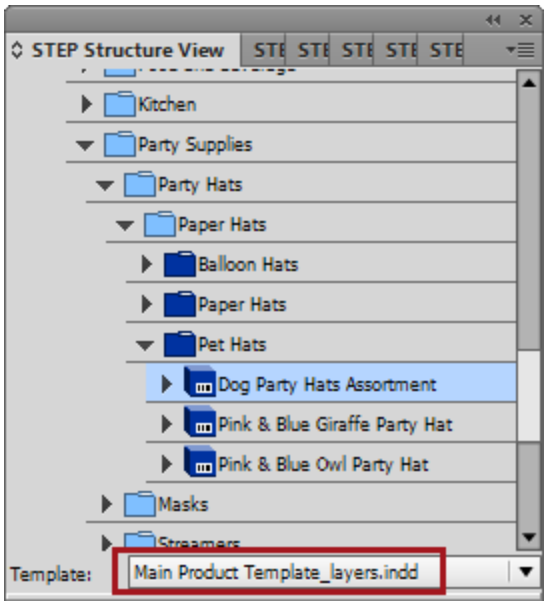
Mounting Multiple Versions in STEP Publisher

Multiple versions can be mounted to a page in a single drag and drop operation by multi-selecting the versions you would like to mount when prompted to choose a version.

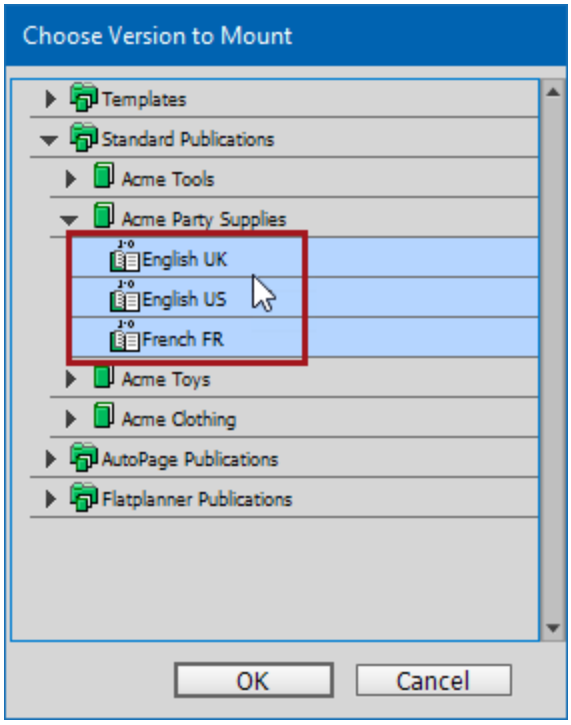
1. Open InDesign, then navigate to STEP > Preferences to open the **Preferences** menu.
2. Check the **Prompt for Version** box, then click **OK** to close the Preferences menu.



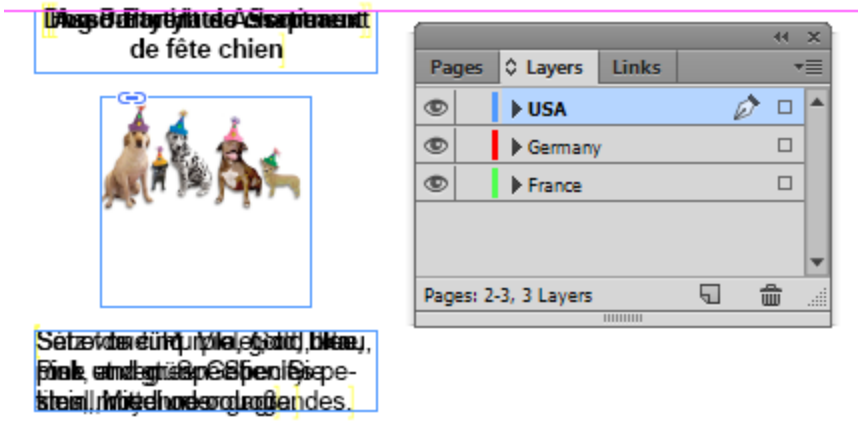
3. Open the STEP Structure View panel by navigating to Window > **STEP Structure View**.
4. Ensure that the correct layer-containing product template is selected in the **Template** dropdown in the panel.



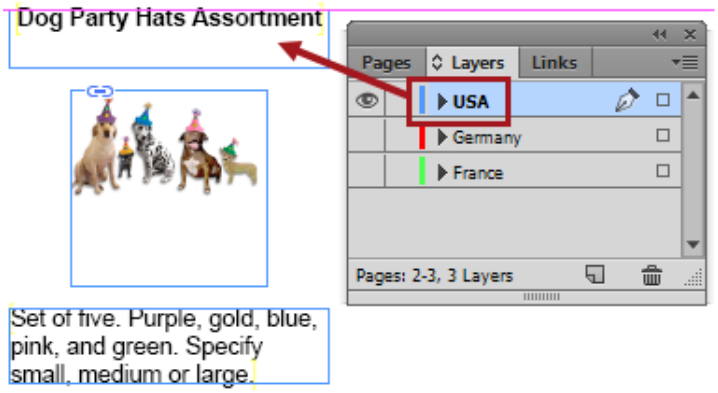
5. In the STEP Structure View tree, locate the product object that you would like to mount, then hold down your left mouse button as you drag it onto the publication template.
6. Release the mouse button where you would like to drop the product onto the page.
7. In the **Choose Version to Mount** dialog that displays, multi-select the versions that you would like to mount by holding Ctrl or Shift while making your selections, then click **OK**.

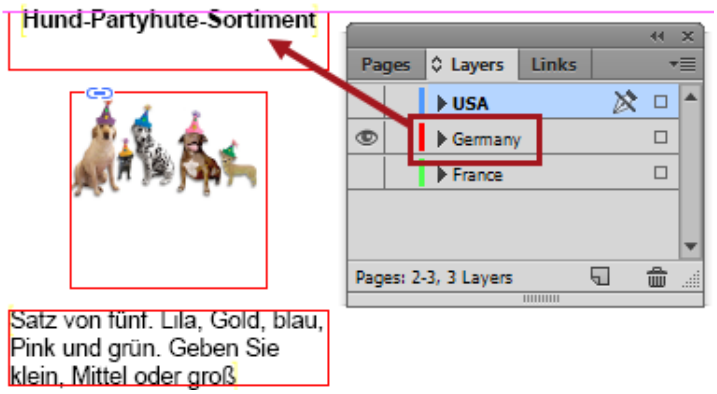


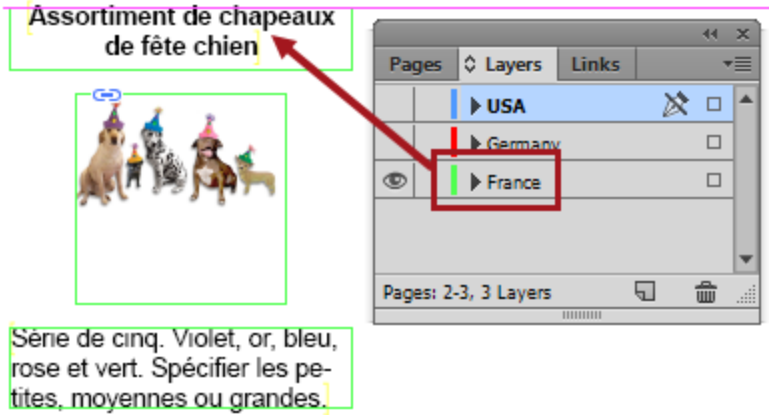
8. The product is mounted on the layers of the publication template.



The following screenshots show how the content looks on the page when viewed one layer at a time.



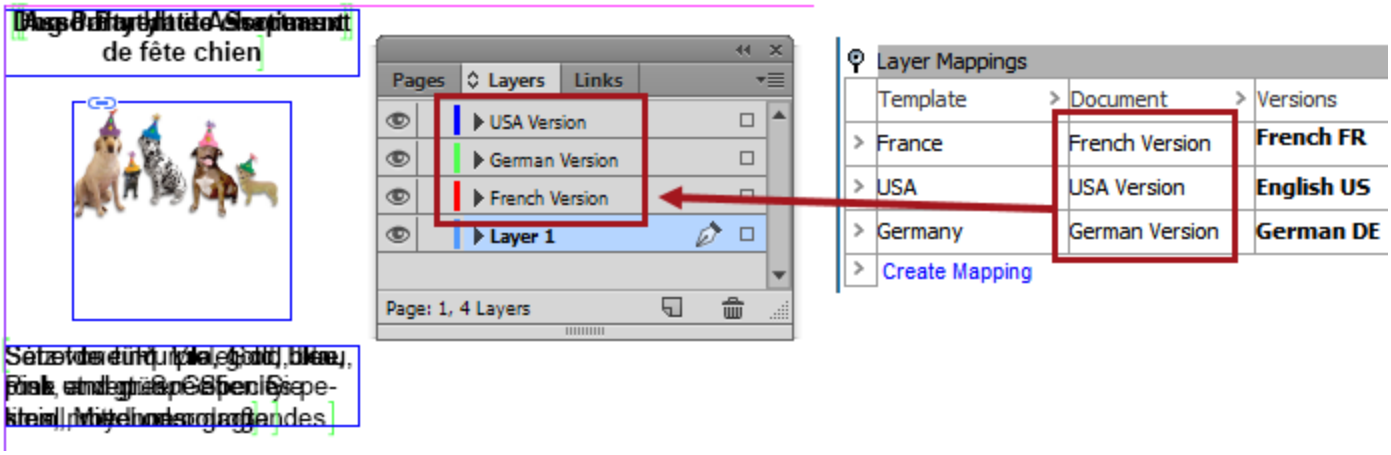




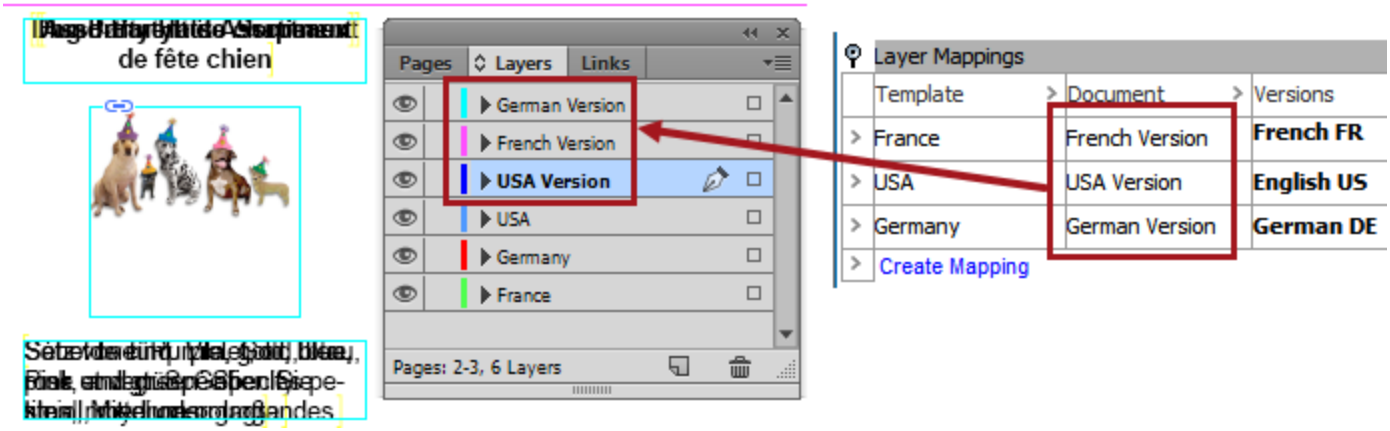
Working With Preexisting Layers and Newly Created Layers

If there are preexisting layers In your publication template and the layer names *exactly* match the name of the layers mapped in the **Document** column of the layer mappings in STEP, then the publication versions will mount on the preexisting mapped layers. If the names of the layers on the publication template do *not* match those in STEP—or if there are no layers to begin with in the publication template—then the layers will be created and given the names provided in the layer mappings.

The following image shows a product mounted on a publication template that did not already have layers other than Layer 1. The product was mounted from a product template containing layers named France, USA, and Germany. Because of the **Document** layer names provided in STEP, the layers were created in the publication template and named 'French Version', 'USA Version', and 'German Version'.



This image shows a similar scenario, except there were already layers on the publication template. However, the content was mounted on three newly created layers since the names of the preexisting layers did not match those in the **Document** column. No content was mounted on the existing layers.



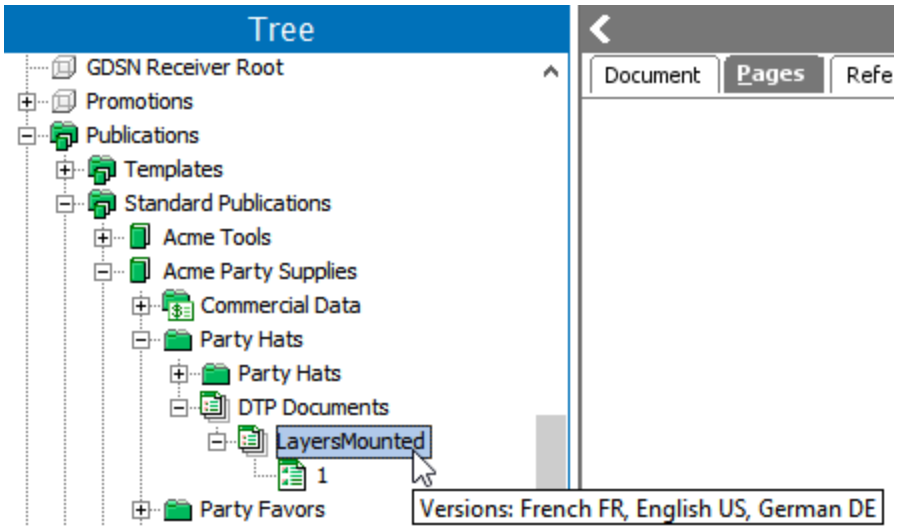
Mounting Multiple Versions in Flatplanner and AutoPage

A huge advantage of using Flatplanner and AutoPage is the ability to mount all publication versions in one operation for entire sections of a publication or even an entire publication at once. Layers and versions are mapped for Flatplanner and AutoPage publications in an identical fashion as that described in this topic.

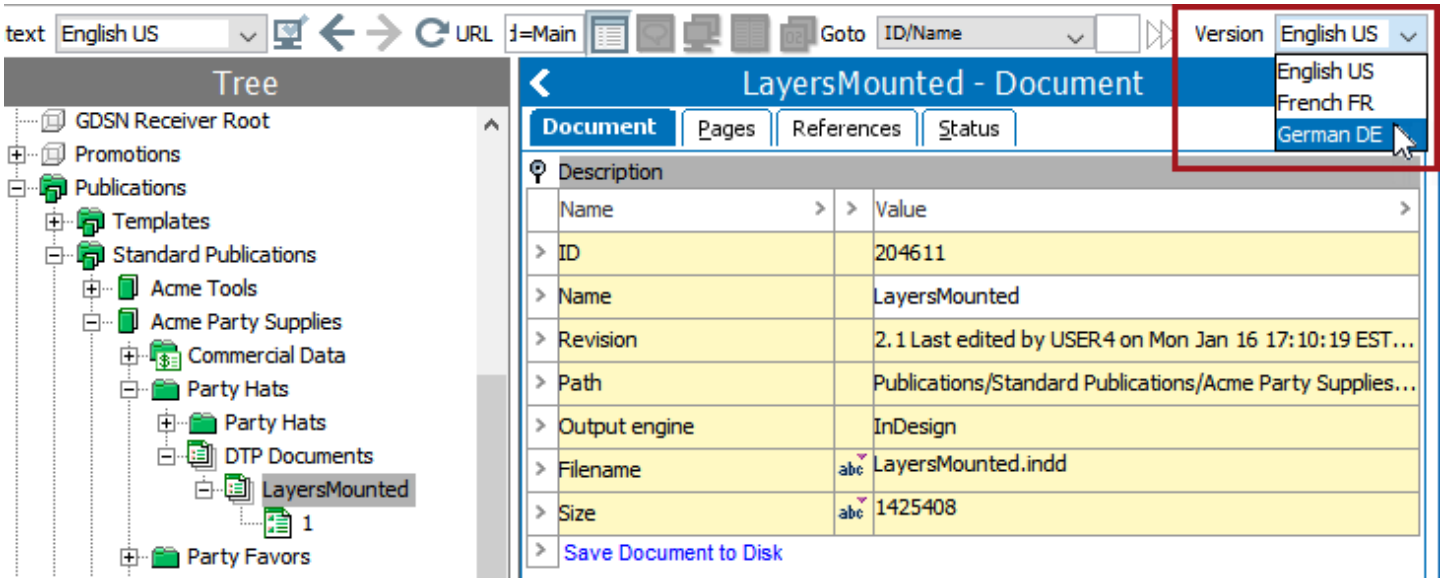
Viewing Version Layers in STEP

When layered InDesign documents are saved to STEP, the individual layers can also be viewed in the workbench based on their publication versions, allowing users to view the different versions without having to access the documents in InDesign.

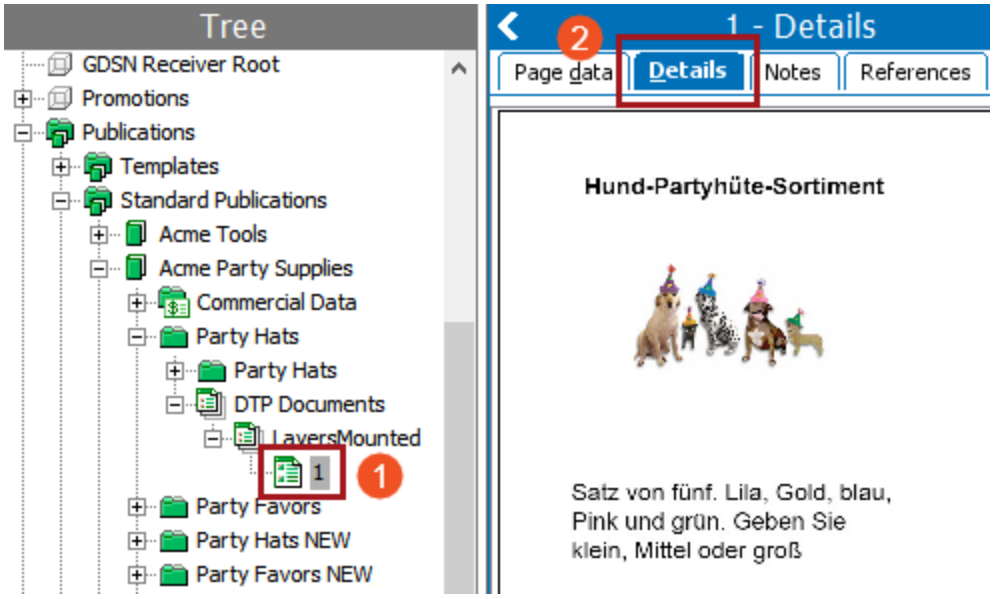
1. Save your finalized InDesign document to STEP by following the instructions outlined in the **Saving Finalized InDesign Documents to STEP** topic.
2. In the STEP Workbench, navigate to the DTP document in the Tree. As pictured below, if you hover over the document with your cursor, the versions mounted in the document appear in the hover text.



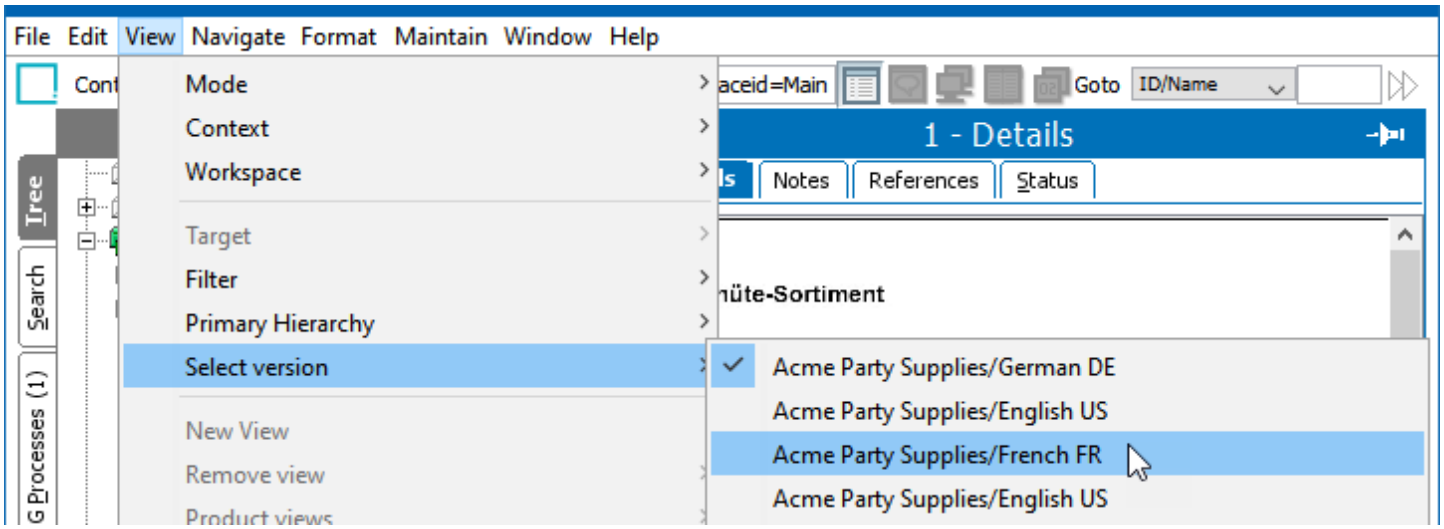
3. With the document selected, choose the version to view from the **Version** dropdown in the upper right corner of the workbench.



4. Select a page in the DTP document, then click on the **Details** tab to view the mounted page. The below screenshot shows the mounted product in the German DE publication version.



5. Alternatively, you can navigate to View > **Select version**, and choose the publication version that you would like to view from the menu.



6. After choosing a version from the **Select version** list, return to step 4 above—select a page in the DTP document, then click on the **Details** tab to view the mounted page.

Changing a Version Layer

Changing a version layer in InDesign will force InDesign to re-fetch the data contents for your version from STEP. Changing context / workspace for a certain version layer will potentially affect all data in the selected version layer in the active document.

The reasons for changing the content on a version layer include the following:

- You have finished creating the pages for the master language of your publication and are now ready to duplicate the layer and update the new layer with content from another version of your publication.
- You have finished creating the pages for your publication by using a publication version that is using content from the Main workspace. You now need to update the pages with content from the Approved workspace.
- You want to attach an existing document to another publication.
- You actually want to *avoid* working with layers in your InDesign documents.

Adopting Layout and Content From Another Version

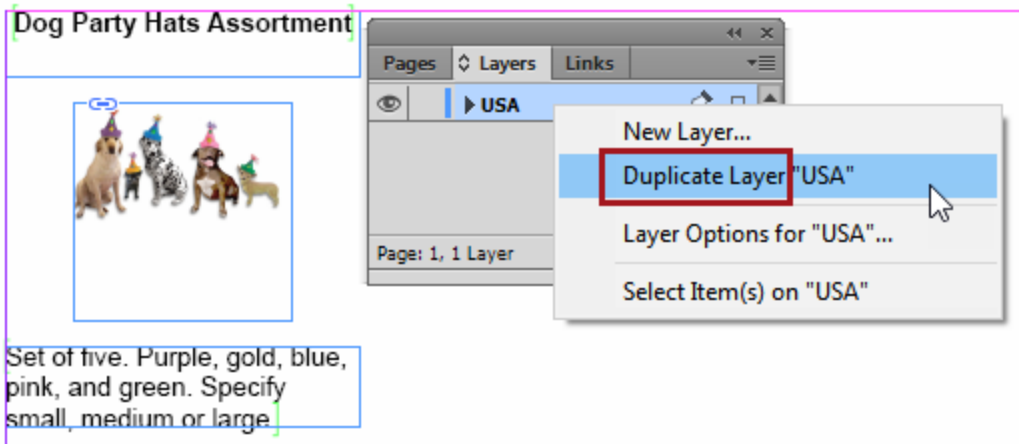
When creating new version layers it is possible to adopt the layout from another publication version—either within the same publication or a different one—then swap out the dimension-dependent content on the page using the **Layer Version Update** feature in STEP Publisher.

A typical workflow for working with version layers in STEP'n'design is that you first create your full master version layer. This means that you mount your products from your first version into your InDesign page or spread. Then you use the features of InDesign to edit the layout of the pages and the products on the pages. Only when you are happy with the way a version's pages look, you will start creating the other version layers. Following this procedure will make it easier for you to let the remaining version layers in a publication reuse the layout you have created on the original mounted pages.

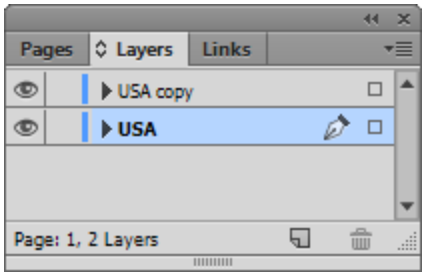
It is possible to duplicate a version layer from the **Layers** panel (opened by navigating to Window > Layers in InDesign, or pressing F7) and then change the version afterward. This way, you keep all your formatting and layout from one version to another within a publication, and you can mount several versions of a publication within the same document.

The following directions are for adding content from a different publication version when working within the *same* publication or from a *different* publication.

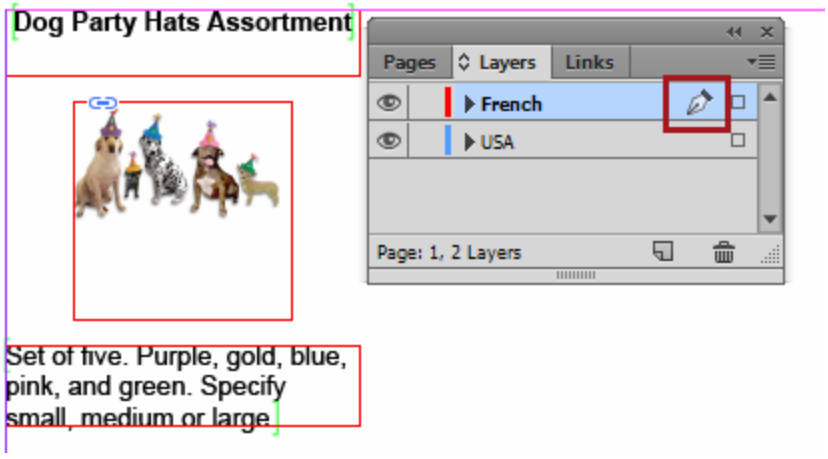
1. Select the relevant version layer in the **Layers** tab, then right-click and select **Duplicate Layer**.



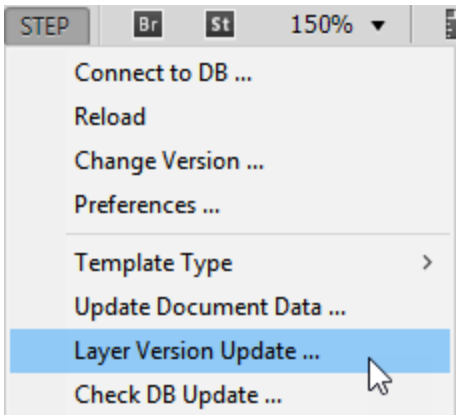
2. The layer is duplicated into a new layer with the name of the original layer followed by the word 'copy'.



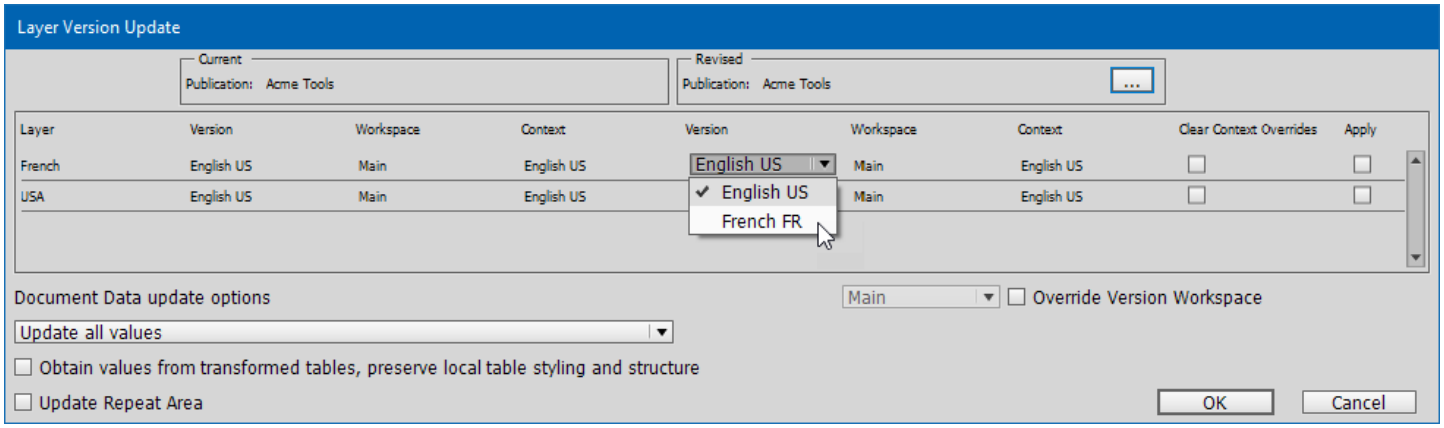
3. Rename the duplicated layer and change its color by following the instructions outlined in the **Creating Layers in Templates** topic.
4. Ensure that you are working on the duplicated layer by making sure that the **pen** icon is visible on the selected layer.



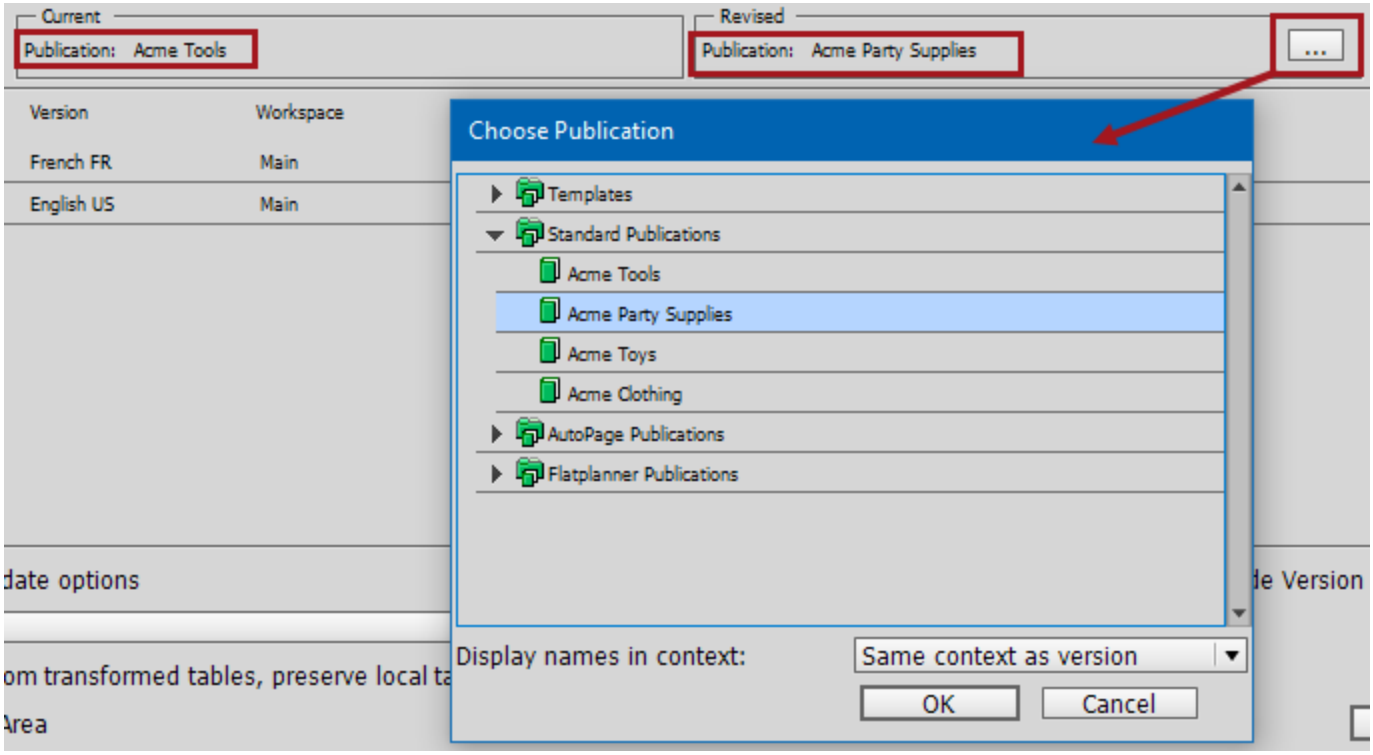
5. Navigate to STEP > **Layer Version Update**.



6. In the **Layer Version Update** dialog, select the version that you would like to update your layer *to* from the **Version** dropdown list.

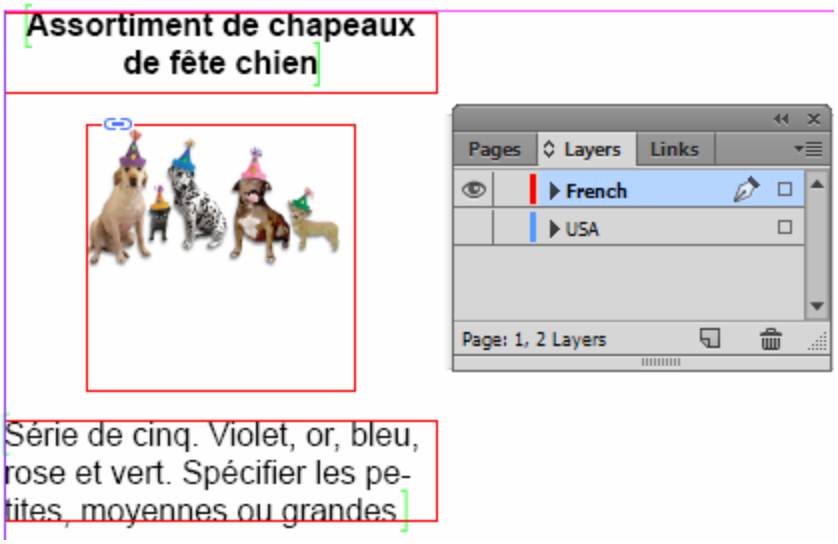


To use a version from a *different* publication, click the ellipsis button (...) in the 'Revised' field. Select the desired publication from the **Choose Publication** dialog, then click OK. Updating the content with a version from a different publication will allow you to save your mounted pages back to that publication in STEP.



7. Once the new version is selected, the **Apply** checkbox is automatically selected.

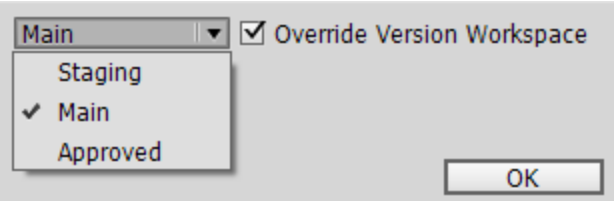
8. Click **OK** to update the layer content.



Additional Options on the Layer Version Update Dialog

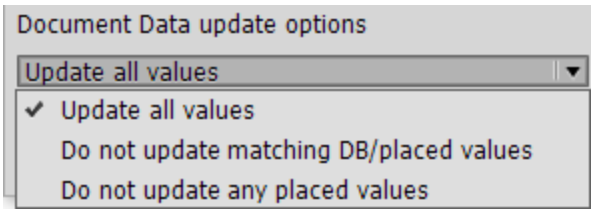
The following options available on the Layer Version Update dialog can be selected to further control how data on the duplicated layer is updated from STEP.

- **Clear Context Overrides:** This option sets the context applied to all items on the layer to that is assigned to the version. If a frame or attribute had a specific context applied through the product template settings on the STEP Template Content panel, these context overrides are removed.
- **Override Version Workspace:** This option swaps the workspace of mounted products. For example, if you built your publication using a publication version that was pulling content from the Main workspace, you can then swap the workspace to the Approved workspace to overwrite the values with those from the Approved workspace. To swap the workspace, check the 'Override Version Workspace' checkbox and select the workspace from which you would like to pull the content from when you update the content on your layer.



  For more information about workspaces, see the **Workspaces** topic in the **System Setup / Super User Guide** documentation**.**

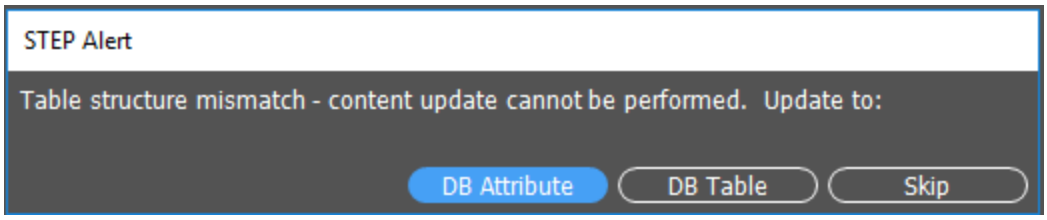
- Under the **Document Data update options** label is a dropdown list that contains the following options.



  - **Update all values:** Updates all values within the document, even if the values are identical to those in STEP.
  - **Do not update matching DB/placed values:** Only updates values that do not match placed values. 'Placed' values refer to the values that exist on the page, which may or may not be different than the values that exist in STEP at the time of the update. The placed values will be compared to the values in STEP and if these two values are identical, no change will occur. This option is a useful way to retain styling made to placed values that match the new values in STEP. This also allows for quicker processing time, since all values do not have to be updated—only the ones that do not match.
  - **Do not update any placed values:** Updates the publication and version references of the mounted elements but does not update the page data.
- **Obtain values from transformed tables, preserve local table styling and structure:** If there are mounted tables on the layer that you are updating, checking this box will retain the existing table structures and only update the values within the tables. For example, local styling might have been applied to the table on the InDesign page after its original mount, such as the alteration of row / column sizes or the addition of

color shading (either manually or through a previous table transformation). Checking this box ensures that the table structure and formatting remain as-is and only the values are updated. If the box is not checked, the entire table is re-sent from the database (force updated) and any local updates made to the table are lost.

If actual table structural changes *have* been made to the table in STEP, such as the addition or removal of rows or columns, then a **Table Structure Mismatch** alert dialog will display.



  - Choose **DB Attribute** to only update the content in the table. The structure of the table will not change; any inclusions or exclusions of rows / columns or any other changes made to the table structure will not be updated.
  - Choose **DB Table** to update the table with all the structural changes made in STEP. This is the recommended option when any structural changes have been made to the table since it was mounted.
  - Choose **Skip** to make no changes to the table at all.
- **Update Repeat Area:** Checking this box will compare the list of objects in STEP applicable to a repeat area to the objects mounted on the page (ignoring order). Additional objects are placed at the end of the list unless deleted items are also found, in which case added items replace the deleted items until there are no more deleted items and the remaining items are then placed at the end of the list.

  A repeat area is created in the product template using the 'Repeat Selection' feature (STEPREPEAT). This function is applied to a group of attributes in the product template and causes the values of the selected attributes to repeat for the child objects of the mounted product. After the product has been mounted onto the page, if there are any inclusions or deletions on the child objects, then choosing this option will allow the user to update the inclusions and/or exclusions. For more information on STEPREPEAT, see the **Using the Repeat Function for Subproduct**s topic.

Alternative to Working With Version Layers

InDesign documents created from a publication that has multiple versions are not required to use layers. A single 'master' publication can be created that contains multiple versions, but layers are not needed because all versions will not be mounted at once.

For example, your business may publish a near-identical catalog in 15 languages, but the 'master' language catalog (e.g., US English) needs to go to press before the translated versions are ready. When the translated content is available in STEP, the single-layer US English catalog can be opened in InDesign, then the layer can be updated with content from a different version within the publication by using the **Layer Version Update** feature. This updated document can then either be saved back to the publication in STEP (as separate files from the original language) or saved locally, outside of STEP.

Creating Document Indexes

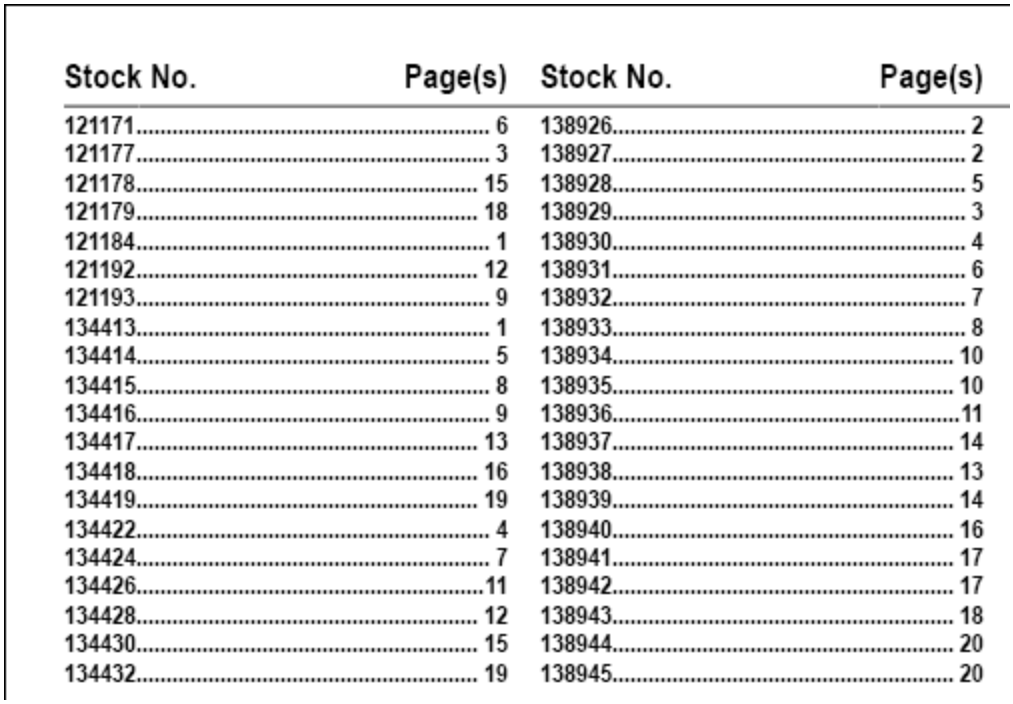
This documentation section provides information about creating document indexes from finalized InDesign pages that have been saved back to STEP.

The two most common types of indexes created from STEP are a basic 'stock number' index and a more advanced 'alphabetical index.' These are not official STEP terms, but they are used in this documentation as labels to describe the two most common types of indexes generated from finalized InDesign pages saved into STEP.

Though an index can be generated using standard InDesign features, this is not ideal for a typical STEP-produced product catalog, since, in most cases, using InDesign to generate the index requires a manual selection of index words on each individual page.

Stock Number Indexes

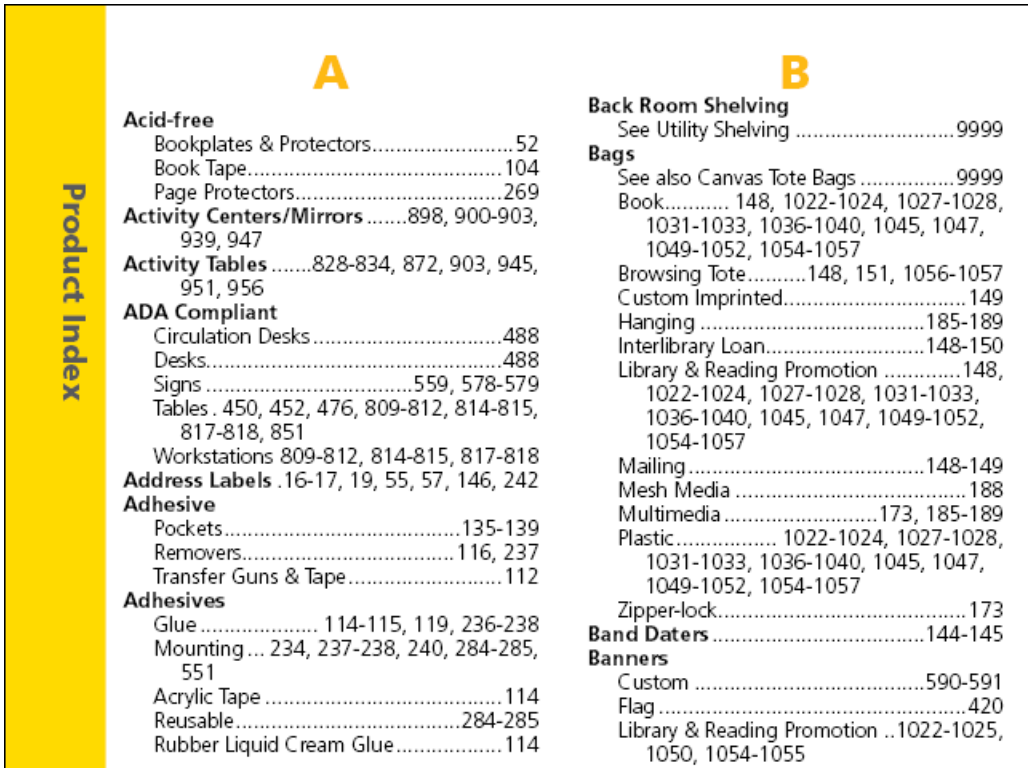
Stock number indexes do not use index words or an index words hierarchy. The following screenshot shows a sample stock number index mounted onto an InDesign page.



Stock No.	Page(s)	Stock No.	Page(s)
121171	6	138926	2
121177	3	138927	2
121178	15	138928	5
121179	18	138929	3
121184	1	138930	4
121192	12	138931	6
121193	9	138932	7
134413	1	138933	8
134414	5	138934	10
134415	8	138935	10
134416	9	138936	11
134417	13	138937	14
134418	16	138938	13
134419	19	138939	14
134422	4	138940	16
134424	7	138941	17
134426	11	138942	17
134428	12	138943	18
134430	15	138944	20
134432	19	138945	20

Alphabetical Indexes

Alphabetical indexes require the use of **index words** and an index words hierarchy. The following screenshot shows a sample alphabetical index mounted onto an InDesign page.


Product Index

A

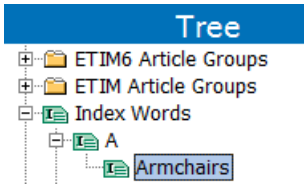
Acid-free
Bookplates & Protectors....52
Book Tape....104
Page Protectors....269
Activity Centers/Mirrors....898, 900-903, 939, 947
Activity Tables....828-834, 872, 903, 945, 951, 956
ADA Compliant
Circulation Desks....488
Desks....488
Signs....559, 578-579
Tables. 450, 452, 476, 809-812, 814-815, 817-818, 851
Workstations 809-812, 814-815, 817-818
Address Labels .16-17, 19, 55, 57, 146, 242
Adhesive
Pockets....135-139
Removers....116, 237
Transfer Guns & Tape....112
Adhesives
Glue....114-115, 119, 236-238
Mounting... 234, 237-238, 240, 284-285, 551
Acrylic Tape....114
Reusable....284-285
Rubber Liquid Cream Glue....114

B

Back Room Shelving
See Utility Shelving....9999
Bags
See also Canvas Tote Bags....9999
Book....148, 1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057
Browsing Tote....148, 151, 1056-1057
Custom Imprinted....149
Hanging....185-189
Interlibrary Loan....148-150
Library & Reading Promotion....148, 1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057
Mailing....148-149
Mesh Media....188
Multimedia....173, 185-189
Plastic....1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057
Zipper-lock....173
Band Daters....144-145
Banners
Custom....590-591
Flag....420
Library & Reading Promotion ..1022-1025, 1050, 1054-1055

Index Words

Index words are created in the workbench Tree under the **Index Words** node and can be linked to as many products as needed. For more information about creating Index words and linking them to products in STEP, see the **Creating an Index Words Structure** topic.



Tables of Contents

As opposed to indexes, which are located at the back of publications, tables of contents are found at the beginnings of publications or publication sections. It is typically recommended to use the standard table of contents functionality in InDesign to create traditional tables of contents.

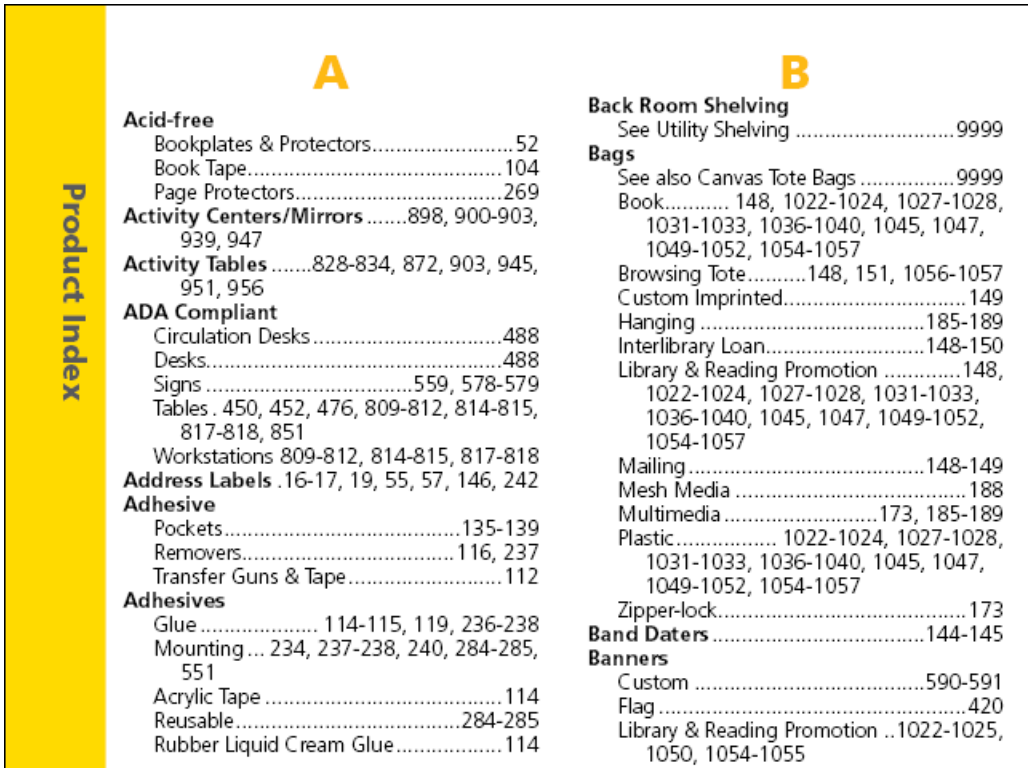
However, STEP Publisher can be used to create 'section indexes' from STEP, which are a type of table of contents. Since the creation of a section index follows a different process than the creation of a document index, it is not covered in this section. For information on how to create a product template designed to create a 'section index' table of contents, see the **Creating a Table of Contents Product Template** topic.

Creating an Index Words Structure

In order to generate and extract an alphabetical index from a publication in STEP, a hierarchy of **Index Words** must first be created. These words must then be linked to the products that should appear in the index. Index words are created in the Tree under the Index Words root node and can be linked to as many products as needed. For example, you may need to link a product family containing chair products to two different index words—'Chairs' and 'Furniture.' Child products within the family could further be linked to sub-levels of index words, for example, 'Swivel chairs' or 'Recliners.'

The index word hierarchy functions similarly to a classification hierarchy in STEP. Products are linked to index words from the product **References** tab, similar to how products are linked to classification folders. Index word links are also inherited from parent to child objects.

The following screenshot shows a partial sample of an index exported from a publication in STEP:



Product Index

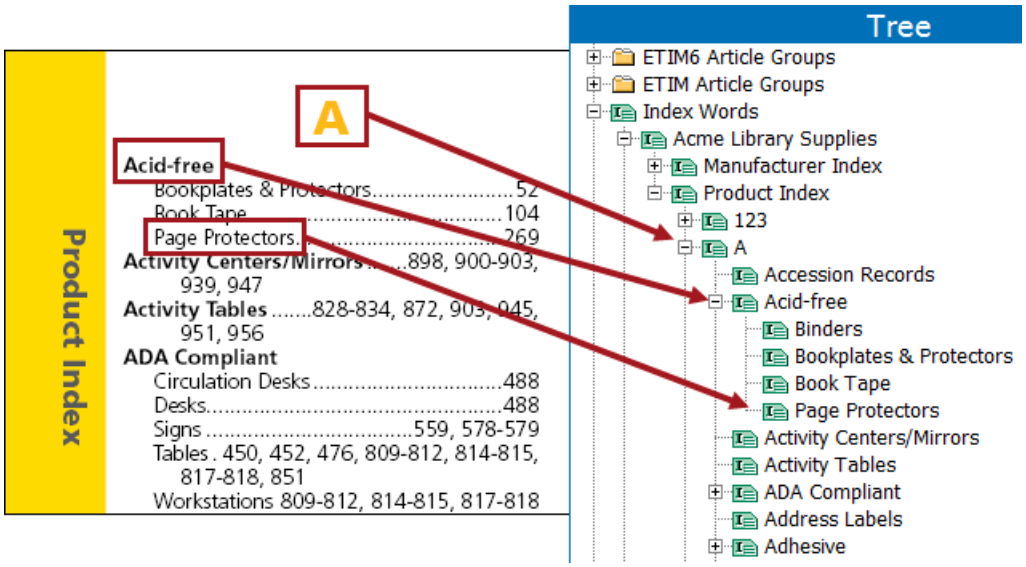
A

Acid-free
Bookplates & Protectors....52
Book Tape....104
Page Protectors....269
Activity Centers/Mirrors 898, 900-903, 939, 947
Activity Tables 828-834, 872, 903, 945, 951, 956
ADA Compliant
Circulation Desks....488
Desks....488
Signs....559, 578-579
Tables . 450, 452, 476, 809-812, 814-815, 817-818, 851
Workstations 809-812, 814-815, 817-818
Address Labels .16-17, 19, 55, 57, 146, 242
Adhesive
Pockets....135-139
Removers....116, 237
Transfer Guns & Tape....112
Adhesives
Glue 114-115, 119, 236-238
Mounting ... 234, 237-238, 240, 284-285, 551
Acrylic Tape....114
Reusable....284-285
Rubber Liquid Cream Glue....114

B

Back Room Shelving
See Utility Shelving 9999
Bags
See also Canvas Tote Bags 9999
Book.... 148, 1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057
Browsing Tote....148, 151, 1056-1057
Custom Imprinted....149
Hanging 185-189
Interlibrary Loan....148-150
Library & Reading Promotion 148, 1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057
Mailing....148-149
Mesh Media 188
Multimedia 173, 185-189
Plastic.... 1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057
Zipper-lock....173
Band Daters 144-145
Banners
Custom 590-591
Flag....420
Library & Reading Promotion ..1022-1025, 1050, 1054-1055

The next screenshot shows a section of the same index, superimposed with a portion of the index words hierarchy that was used to generate the index:

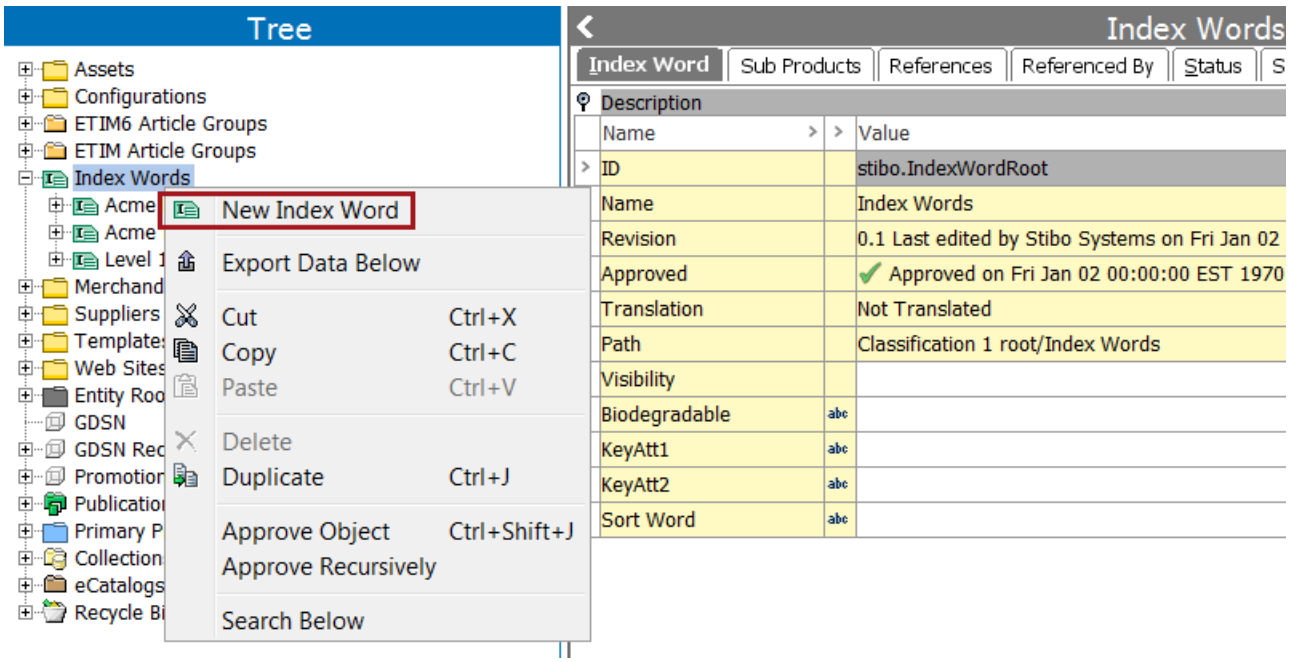


When generating an index, it is possible to use InDesign's standard features. However, for a typical STEP-produced publication, standard InDesign functionality is not ideal as it typically requires a manual selection of index words on each individual page. An index created in STEP, however, can generate an entire publication index with a single STEPXML export in the 'Alphabetical Index - XML' format.

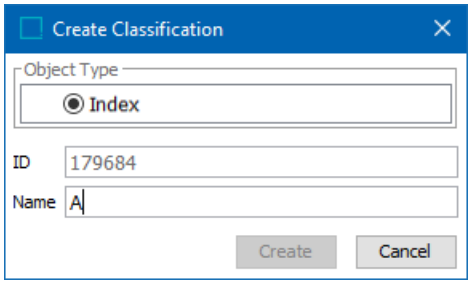
For detailed instructions on how to export an index from a publication in STEP, see the **Creating Document Indexes** section of the **STEP Publisher** documentation.

Creating Index Words

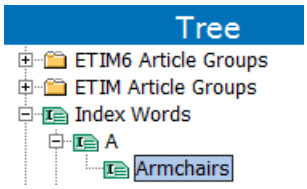
1. In the Tree, navigate to the Index Words root node, then right-click and select **New Index Word**.



2. In the **Create Classification** dialog that displays, enter a **Name** for your index word, then click **Create**. (By default, the 'Index' alternate classifications object type [ID = stibo.IndexWord] is configured to autogenerate an ID by using the ID Pattern of [id].)



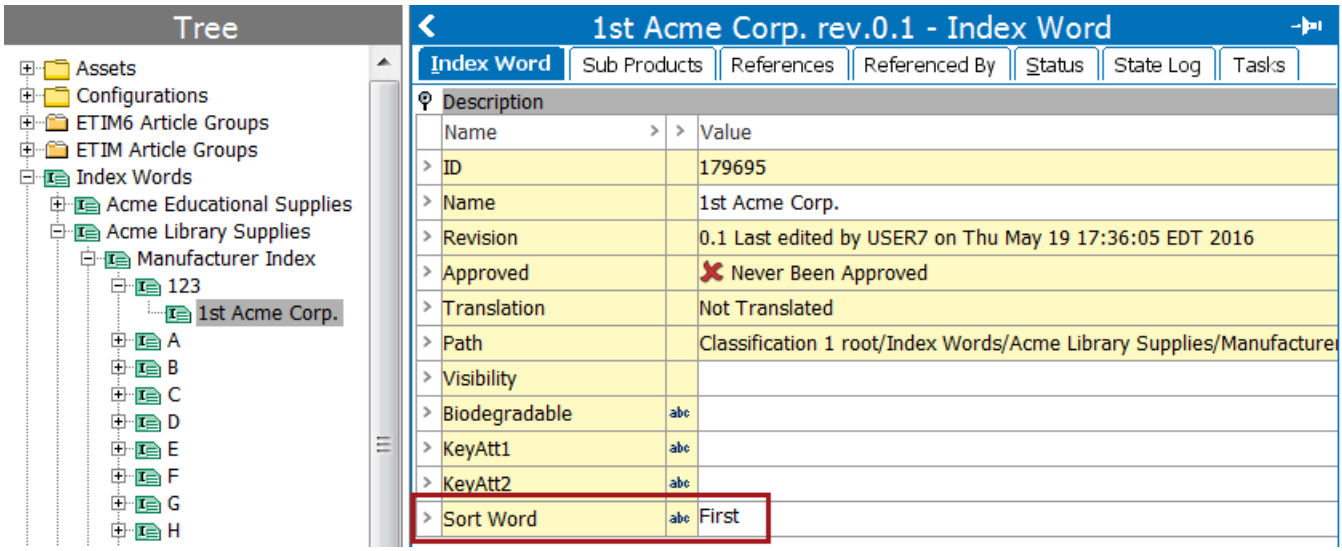
3. To create additional sub-levels of index words, right-click on the index word you just created (in this example, 'A'), select **New Index Word**, then repeat step 2. An unlimited number of sub-levels may be created.



Note: Typically, an index word hierarchy intended for use with a single language will have a 'parent' level of single index letters (for example, A, B, C). For dimension-dependent indexes, however, it is recommended to instead use a transformation on export that extracts the first letter of each word that begins a new letter in the index. For information on this method, see the **Exporting Index Data from STEP** topic.

Using a Sort Word

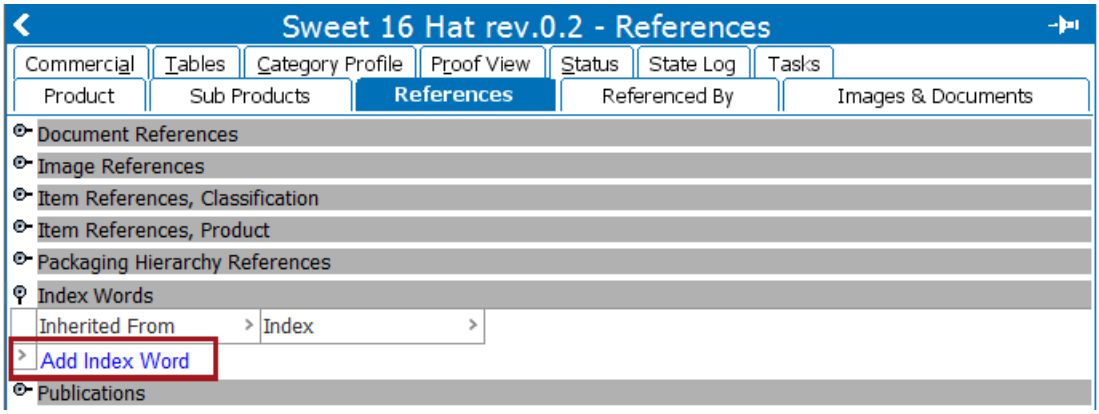
In the index word editor, enter a **Sort Word** if, on output, you would like your index word to be placed in a different area of the index than its alphabetical order. For example, if you are creating a supplier index and one of your company names begins with a numeral, such as '1st Acme Corp.', you may want this company to appear in the F section of the index output (listed with other companies whose names begin with the word 'First') instead of appearing before the letter A, where entries that begin with numbers would be placed in a standard alphabetical sort order.



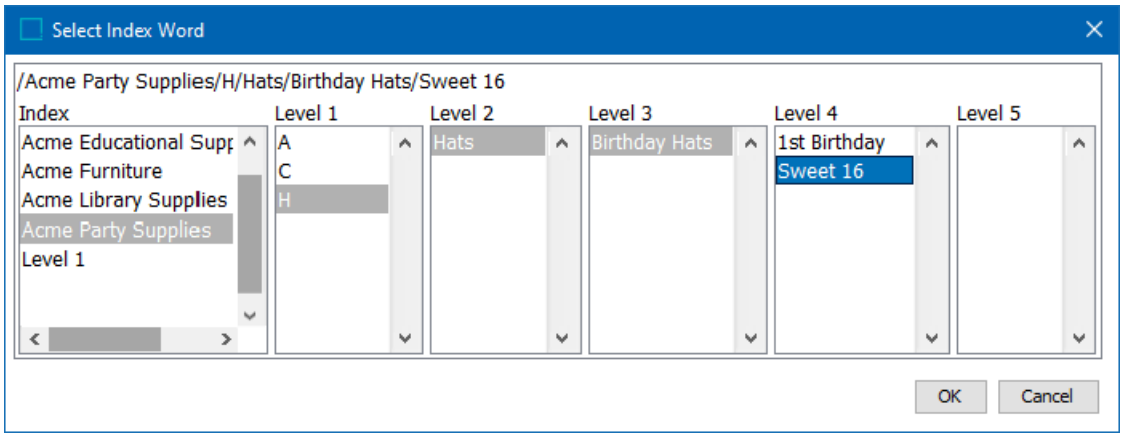
Linking Products to Index Words from the Product Hierarchy

Once your index words hierarchy is created, you may now link these words to products.

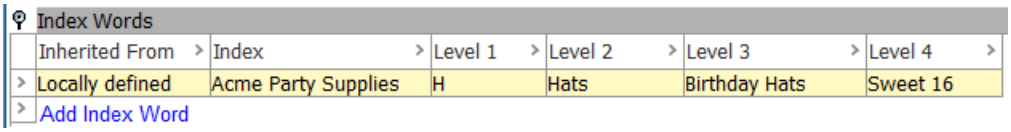
1. In the Tree, navigate to the product to which you would like to link your index word(s).
2. On the **References** tab, expand the flipper for Index Words and click **Add Index Word**.



3. Select the relevant index, then click through the additional levels until you have applied the desired index words. Click **OK**.



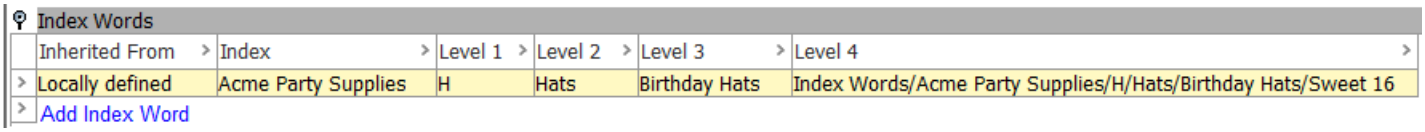
4. The product is now linked to the index word.



5. Repeat the above steps to link your product to additional index words. A single product can be linked to multiple index words, depending on all of the index locations where the product should appear.

Note on Index Word Pathnames

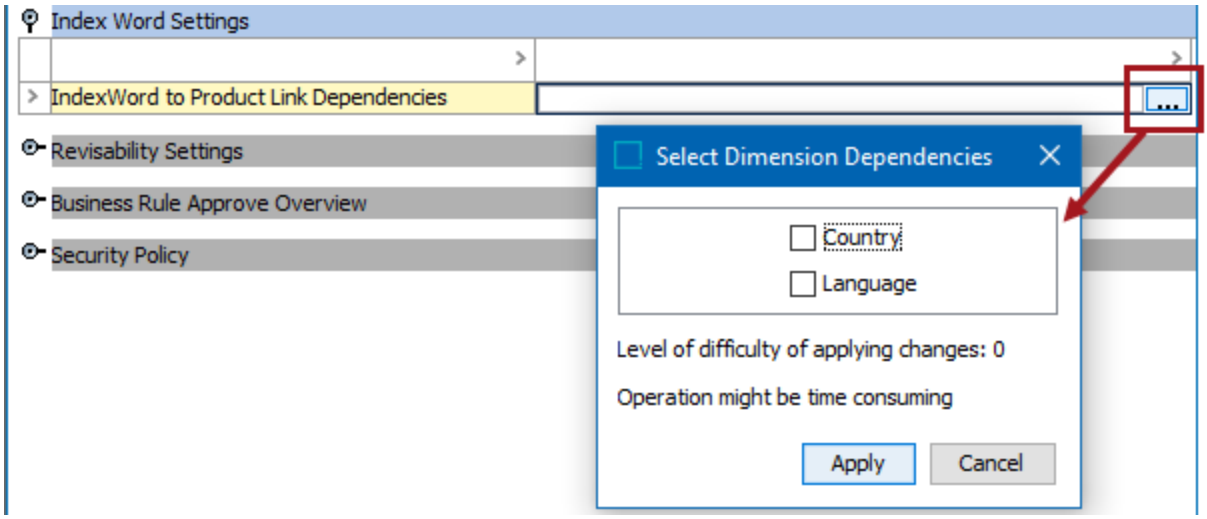
If the system setting **Use full pathname for classes on Product References Tab** is set to **Y**, the lowest level of each linked index word will appear as a path instead of an individual word. However, this will not impact the output of the index words in the 'Alphabetical Index - XML' file; linked index words will correctly appear as words, not paths.



For more information on this system setting, see the **Product Information Manager Default Settings** section of the **System Setup / Super User Guide** documentation.

Setting Dimension Dependency on Index Word Links

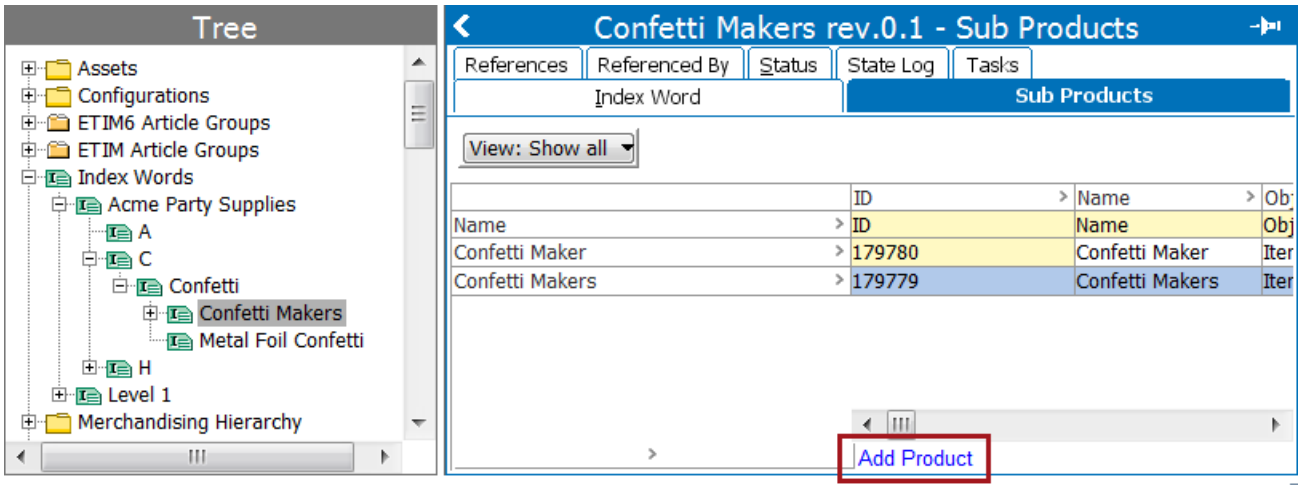
Making the links between products and index words dimension dependent can be useful for situations where not all products are sold in all countries. Because the Index Word product-to-classification link type (ID = stibo.IndexWord) is a hidden object in STEP (see the 'Note on the Index Word Product to Classification Link Type' subsection below for more information), dimension dependency cannot be set on index word link types by the same method used for other product-to-classifcation link types. Instead, the dimension dependency must be set in System Settings under the 'Index Word Settings' flipper. For more information, see the **Index Word Settings** section of the **System Settings** documentation.



Viewing and Linking Products from the Index Words Hierarchy

All products linked to a particular index word can be viewed from the **Sub Products** tab of the index word object. Additionally, products can be added to index words from this tab.

1. In the Tree, navigate to the index word to which you would like to link your product(s).
2. On the **Sub Products** tab, click 'Add Product.'

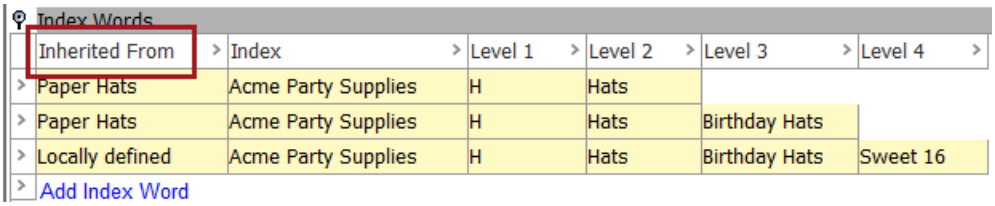


3. In the **Select Classification Product Link** dialog that displays, browse or search for the product(s) that you would like to link to the index word. Multiple products may be selected by holding Shift or Ctrl when making selections.
4. Click **Select** to close the Select Classification Product Link dialog. The products are now linked to the index word.

Inheritance of Index Words

Index words are inherited in a similar fashion to how standard product-to-classification references are inherited. By default, index words are inherited in an **Accumulative** fashion. Allow multiple links is by default set to Yes. This means that an index word that is linked to a parent product will be inherited by all of its child products, and additional index words can be linked to the children *in addition to* the inherited word(s). However, inherited words cannot be overwritten or removed from lower levels.

The **Inherited From** column displays the level at which the index word is linked in the hierarchy. In the following example, the words 'Hats' and 'Birthday Hats' are linked to the parent product 'Paper Hats.' The index word 'Sweet 16' is linked locally ('Locally defined') on the child product.


Index Words

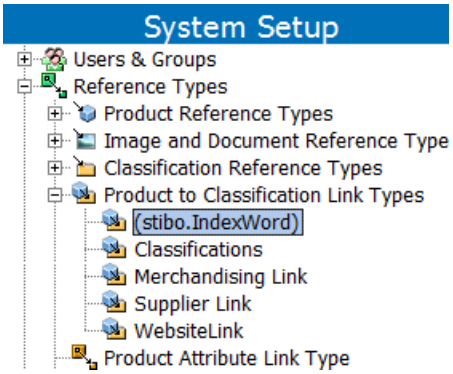
Inherited From	Index	Level 1	Level 2	Level 3	Level 4
Paper Hats	Acme Party Supplies	H	Hats		
Paper Hats	Acme Party Supplies	H	Hats	Birthday Hats	
Locally defined	Acme Party Supplies	H	Hats	Birthday Hats	Sweet 16

Add Index Word

For more information on reference link inheritance, see the **Inheritance Example for a Reference** section of the **System Setup** / **Super User Guide** documentation.

Note on the Index Word Product to Classification Link Type

The Index Word product-to-classification link type (ID = stibo.IndexWord) is a hidden object in STEP. It can only be accessed by searching for its ID in the **Goto** field or on the **Search** tab. Typically, no configuration changes should be made to this object. However, an occasional configuration need may arise, such as the need to make the link type externally maintained.

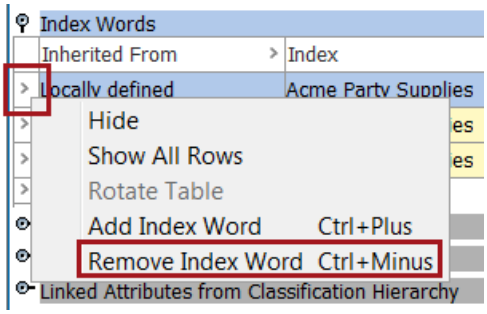


Unlinking Products from Index Words

Unlinking From the Product Hierarchy

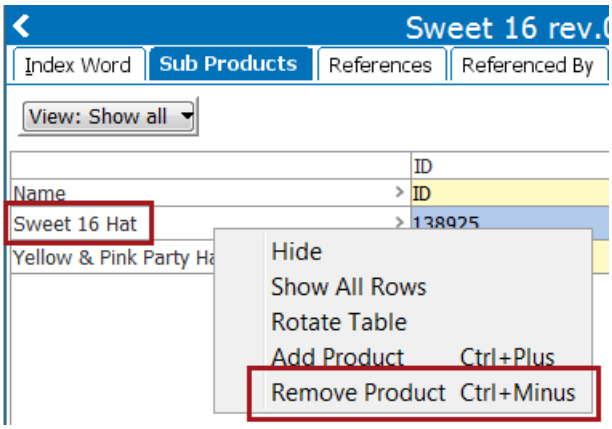
1. Navigate to the relevant product in the Tree, then expand the **Index Words** flipper on the product **References** tab.

2. Right-click the arrow to the left of the word that you would like to remove, then select **Remove Index Word** from the menu. (Note that only words designated as 'Locally defined' can be removed. Inherited words can only be removed from the parent level to which they are linked.)



Unlinking From the Index Word Hierarchy

1. Navigate to the relevant index word in the Tree, then click the **Sub Products** tab.
2. Right-click the name of the product that you would like to unlink, then select **Remove Product**.



Importing and Exporting Index Words

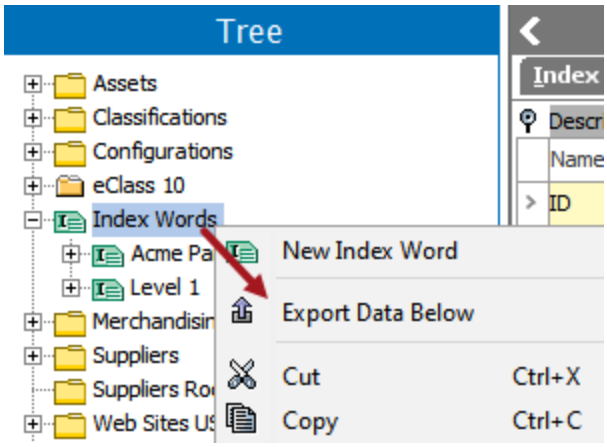
As an alternative to manual creation, an index words structure can be created through an Excel or STEPXML import. Additionally, product objects can be linked to index words through an import. Index word hierarchies are exported and imported in STEP using standard Export Manager and Import Manager functionality.

Note: This topic presumes a basic familiarity with the Export Manager and Import Manager wizards in STEP. For more information, see the **Export Manager** and **Import Manager** sections of the **Data Exchange** documentation.

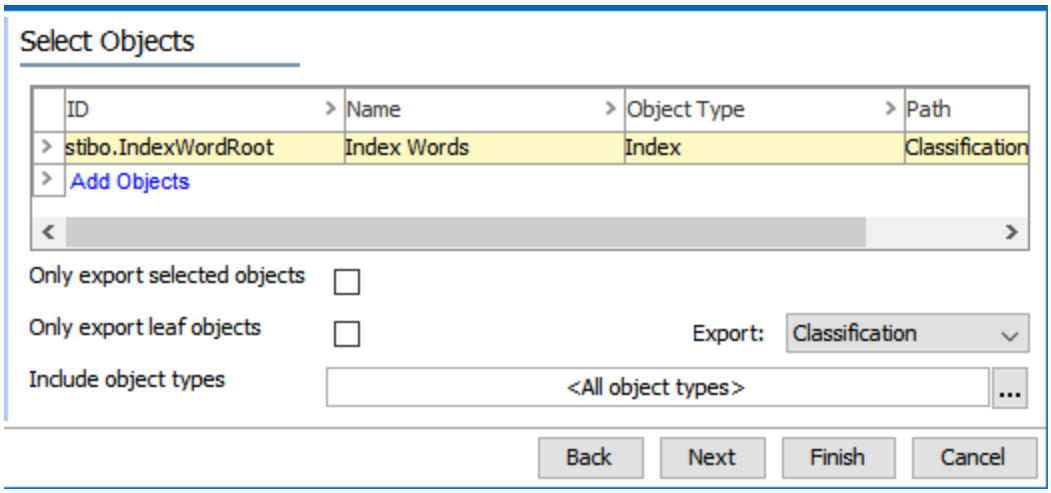
Exporting an Index Words Structure

Index words are exported from STEP in the same method that any other classification hierarchy is exported. Common export formats are Excel, CSV, and STEPXML. The below steps give an overview of how to export an index words structure in **Excel**.

1. In the Tree, select the desired Index Words parent node, then right-click and select **Export Data Below**. In this example, the root node is selected.



2. On the 'Select Objects' screen, uncheck 'Only export leaf objects' and choose 'Classification' from the **Export** dropdown list. Leave 'Include object types' with the default setting of <All object types>. Click **Next**.



3. On the 'Select Format' screen, select **Excel** as the export format, then click Next.
4. On the 'Map Data' screen, select ID, Name, and Parent ID, then click **Finish**.
5. The resulting file will resemble the following.

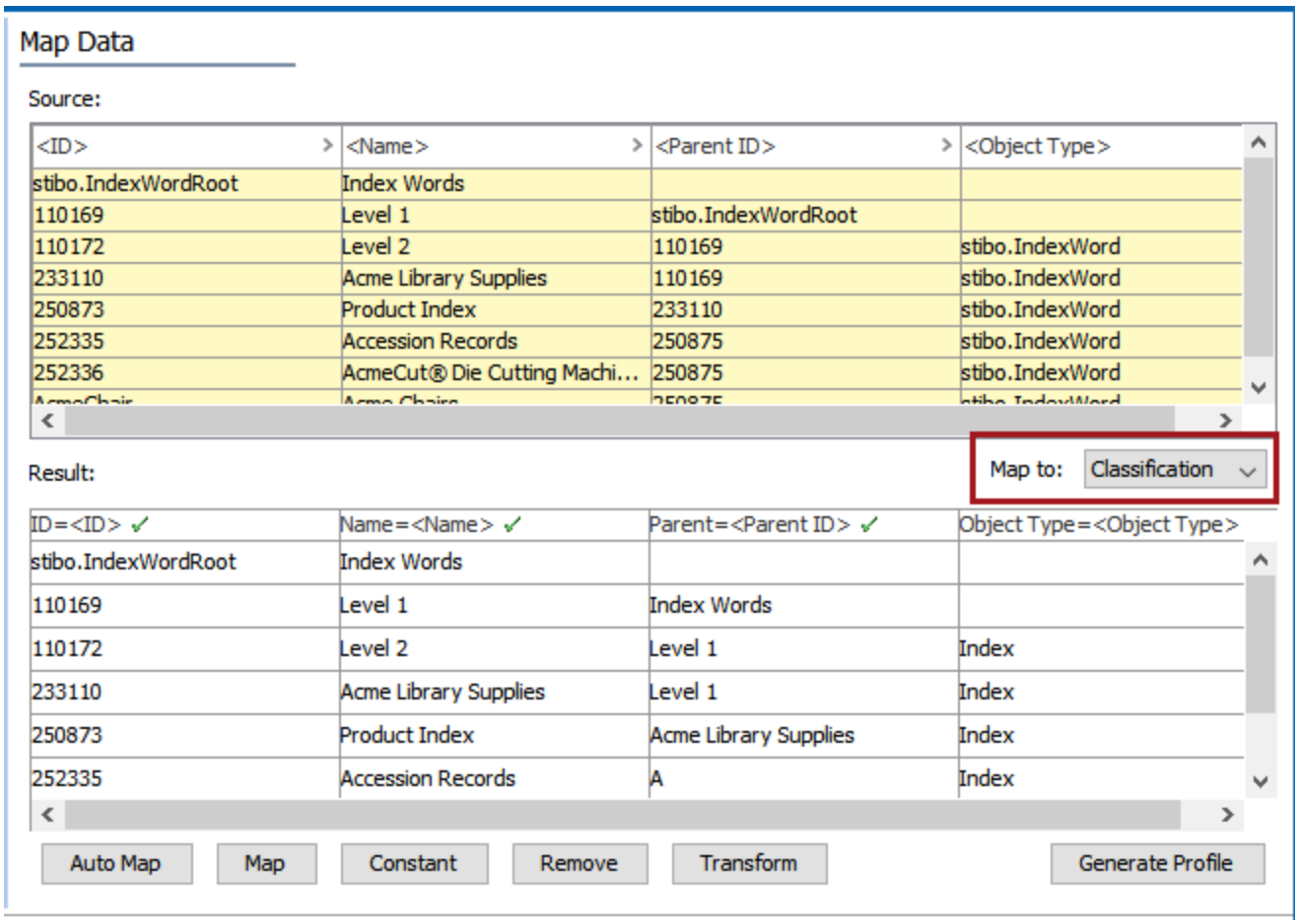
	A	B	C
1	<ID>	<Name>	<Parent ID>
2	stibo.IndexWordRoot	Index Words	Classification 1 root
3	110169	Level 1	stibo.IndexWordRoot
4	110172	Level 2	110169
5	233110	Acme Library Supplies	110169
6	250873	Product Index	233110
7	250875	A	250873
8	252335	Accession Records	250875
9	252336	Acme Die Cutting Machines & Dies	250875

Importing Index Words With Excel

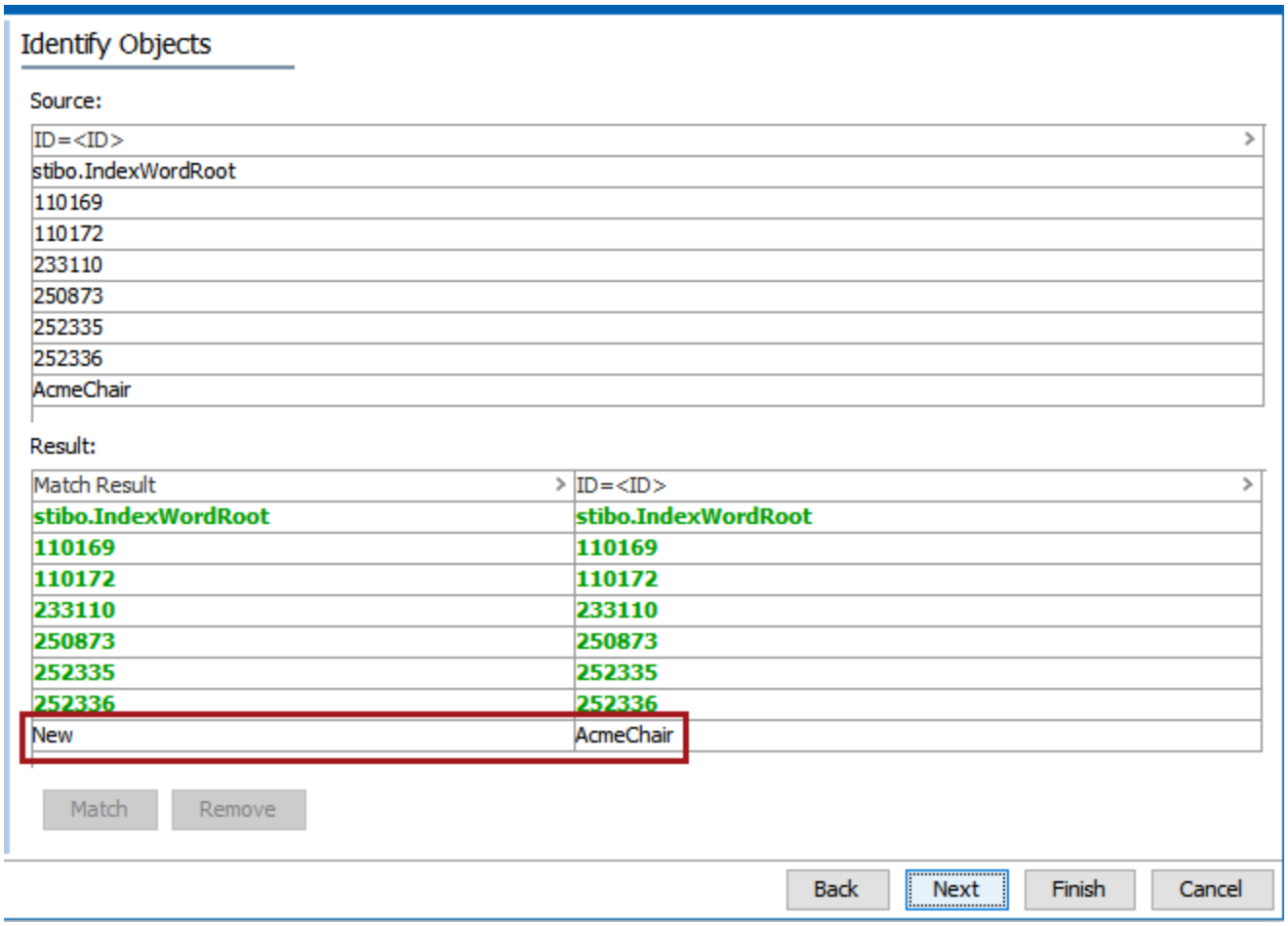
To import index words using Excel, the Excel file will have the same format as the export sheet pulled in the previous section, except a fourth Object Type column is added containing **stibo.IndexWord**. This method can be used to create new index words as well as alter the names of existing index words.

	A	B	C	D
1	<ID>	<Name>	<Parent ID>	<Object Type>
2	stibo.IndexWordRoot	Index Words	Classification 1 root	stibo.IndexWord
3	110169	Level 1	stibo.IndexWordRoot	stibo.IndexWord
4	110172	Level 2	110169	stibo.IndexWord
5	233110	Acme Library Supplies	110169	stibo.IndexWord
6	250873	Product Index	233110	stibo.IndexWord
7	250875	A	250873	stibo.IndexWord
8	252335	Accession Records	250875	stibo.IndexWord
9	252336	AcmeCut® Die Cutting	250875	stibo.IndexWord

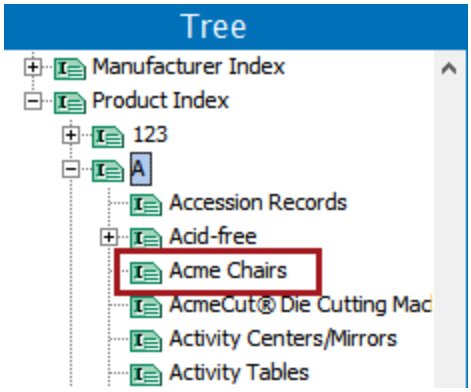
1. To import the sheet, follow the same initial steps as you would to import any other Excel sheet.
2. On the 'Map Data' screen of the Import Manager, select **Classification** in the 'Map to:' dropdown and map the columns as follows—ID, Name, Parent ID, and Object Type.



3. On the 'Identify Objects' screen, existing index words appear in green and new index words appear in black.



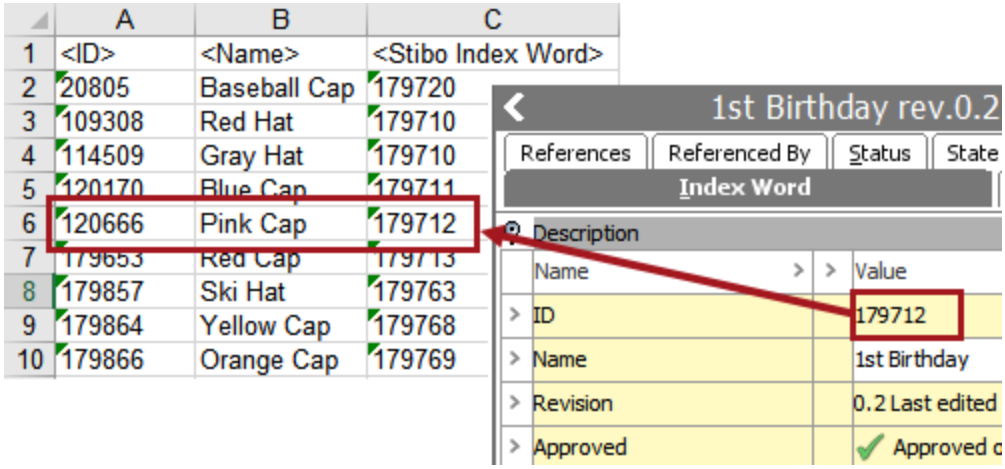
4. Click Finish to complete the import. The new index word shown in the previous step appears in the index words hierarchy.



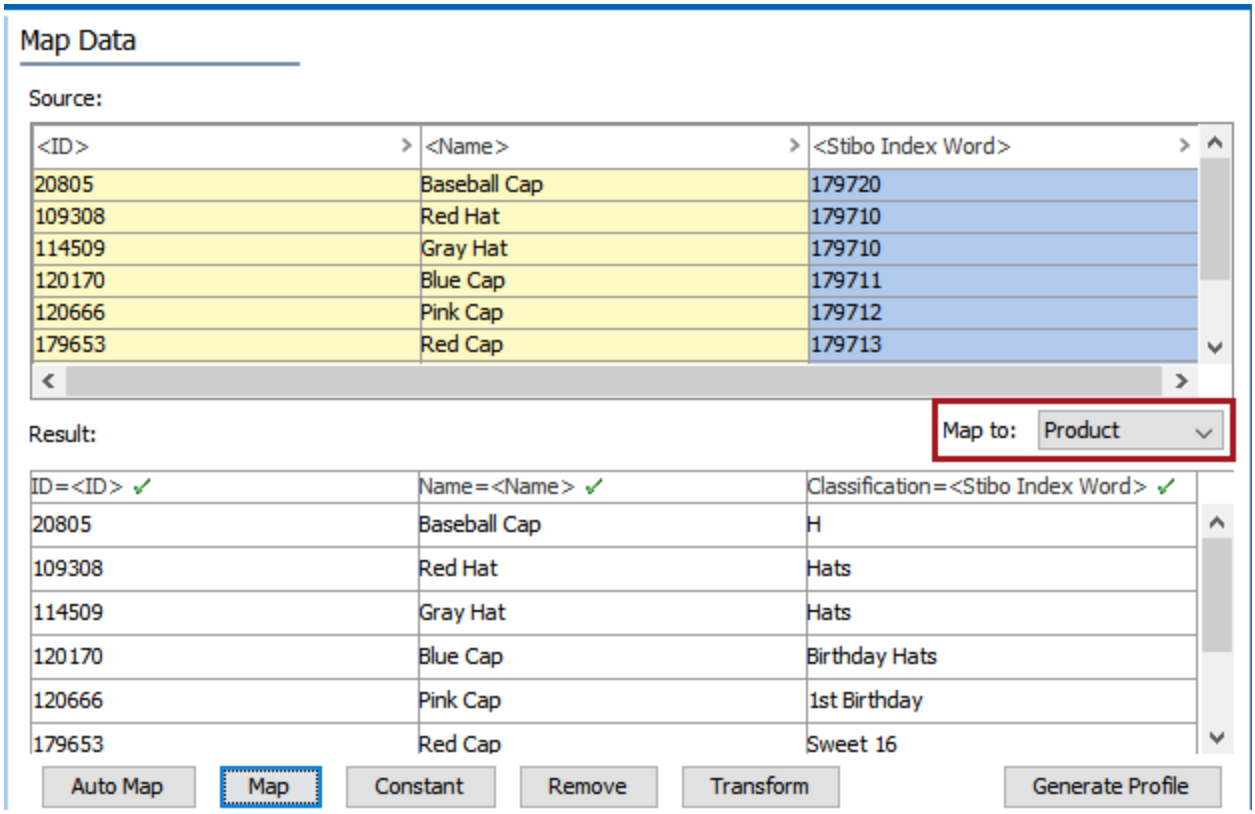
Linking Index Words to Products Using Excel

To link index words to products using an Excel import, the sheet must contain a minimum of two columns: one containing the ID of the product object and a second containing the ID of the index word that will be linked to it.

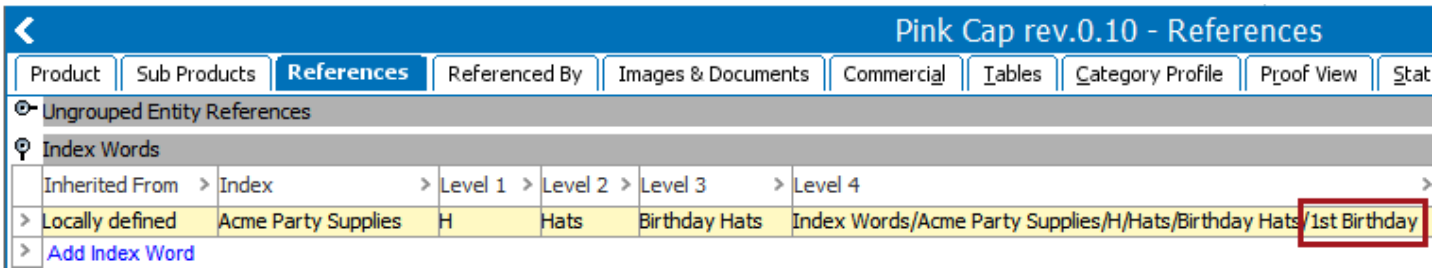
The index word column must have the header **<Stibo Index Word>**. Other columns, such as Name (pictured below), are optional.



1. To import the sheet, follow the same initial steps as you would to import any other Excel sheet.
2. On the 'Map Data' screen of the Import Manager, select **Product** from the 'Map to:' dropdown. Map the ID and Name columns to ID and Name, respectively. Map the <Stibo Index Word> column to **Product Classification Link**.



3. Complete the import as you would any other Excel import.
4. In the Tree, navigate to one of the products contained in the sheet, then go the References tab. Expand the Index Words flipper to view the linked index word.



Importing Index Words and Linking to Products Using STEPXML

Using STEPXML imports, index word structures can be created and products can be linked to index words. An advantage to using STEPXML over Excel is that index words can be created and simultaneously linked to products in a single file.

Create an Index Words Hierarchy With STEPXML

To create an index words hierarchy by STEPXML import, use the following sample format:

```
<STEP-ProductInformation ContextID="Context1" WorkspaceID="Main">
<Classifications>
        <Classification ID="179705" UserTypeID="stibo.IndexWord"
ParentID="stibo.IndexWordRoot">
                <Name>Acme Party Supplies</Name>
                <Classification ID="" UserTypeID="stibo.IndexWord">
                        <Name>X</Name>
                        <Classification ID="" UserTypeID="stibo.IndexWord">
                                <Name>Xylophones</Name>
                                <Classification ID="" UserTypeID="stibo.IndexWord">
                                        <Name>Plastic Xylophones</Name>
                                </Classification>
                                <Classification ID="" UserTypeID="stibo.IndexWord">
                                        <Name>Metal Xylophones</Name>
                                </Classification>
                        </Classification>
                </Classification>
        </Classification>
</Classifications>
```

```
</STEP-ProductInformation>
```

Link Index Words to Products With STEPXML

To link index words to products by STEPXML, use the following sample format:

```
<STEP-ProductInformation ContextID="Context1" WorkspaceID="Main">
<Products>
        <Product ID="20805" UserTypeID="Item">
                <Name>Baseball Cap</Name>
                <ClassificationReference ClassificationID="179720"
Type="stibo.IndexWord"/>
        </Product>
</Products>
</STEP-ProductInforma
```

STEPXML File Example

An example of a STEPXML import used to create an index hierarchy and link products to the index words with a single file is pictured below:

```
<!-- Create Index Hierarchy -->

<STEP-ProductInformation ContextID="Context1" WorkspaceID="Main">
    <Classifications>
        <Classification ID="179705" UserTypeID="stibo.IndexWord" ParentID="stibo.IndexWordRoot">
            <Name>Acme Party Supplies</Name>
            <Classification ID="" UserTypeID="stibo.IndexWord">
                <Name>X</Name>
                <Classification ID="" UserTypeID="stibo.IndexWord">
                    <Name>Xylophones</Name>
                    <Classification ID="" UserTypeID="stibo.IndexWord">
                        <Name>Plastic Xylophones</Name>
                    </Classification>
                    <Classification ID="" UserTypeID="stibo.IndexWord">
                        <Name>Metal Xylophones</Name>
                    </Classification>
                </Classification>
            </Classification>
        </Classification>
    </Classifications>

<!--Linking Index words to Products -->

    <Products>
        <Product ID="20805" UserTypeID="Item">
            <Name>Baseball Cap</Name>
            <ClassificationReference ClassificationID="179720" Type="stibo.IndexWord"/>
        </Product>
    </Products>
</STEP-ProductInformation>
```

Exporting Index Data from STEP

After all InDesign documents for a publication have been finalized and saved back to STEP, data about the mounted products and the pages on which they appear can be exported from the publication in order to generate an **Alphabetical Index - XML** file. This XML file format is used to create both types of indexes—the basic 'stock number' index and the more advanced 'alphabetical index.'

If building an alphabetical index, **index words** are required. This topic assumes that you have already created your index words and index words hierarchy and linked them to the products in your publication. See the **Creating an Index Words Structure** topic for more information.

This topic describes how to export an Alphabetical Index - XML file from a publication in STEP using standard STEP Export Manager functionality. By using the Export Manager, you can define, through mapping, which index words and/or STEP attribute(s) to include in the index output; how to sort the exported data (for example, what country, language, or numerical order should be used to sort); and what separator characters should be placed between multiple page numbers and/or page ranges (such as 1, 2 or 1-3).

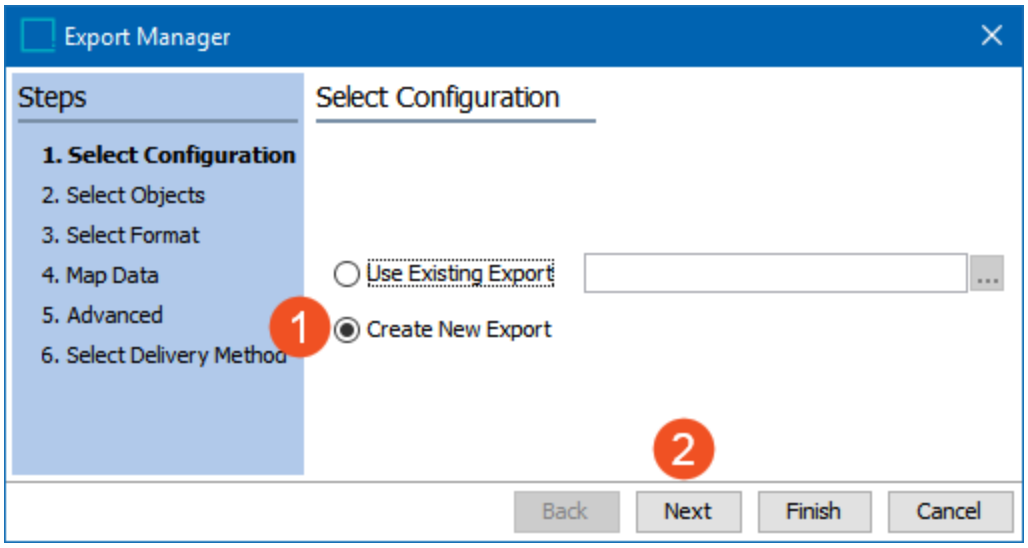
The exported index will organize the index entries into XML tag structures, such as:

<Level1>
<Word>Laser Printer</Word>
<PageNumber>2,5-6</PageNumber>
</Level1>

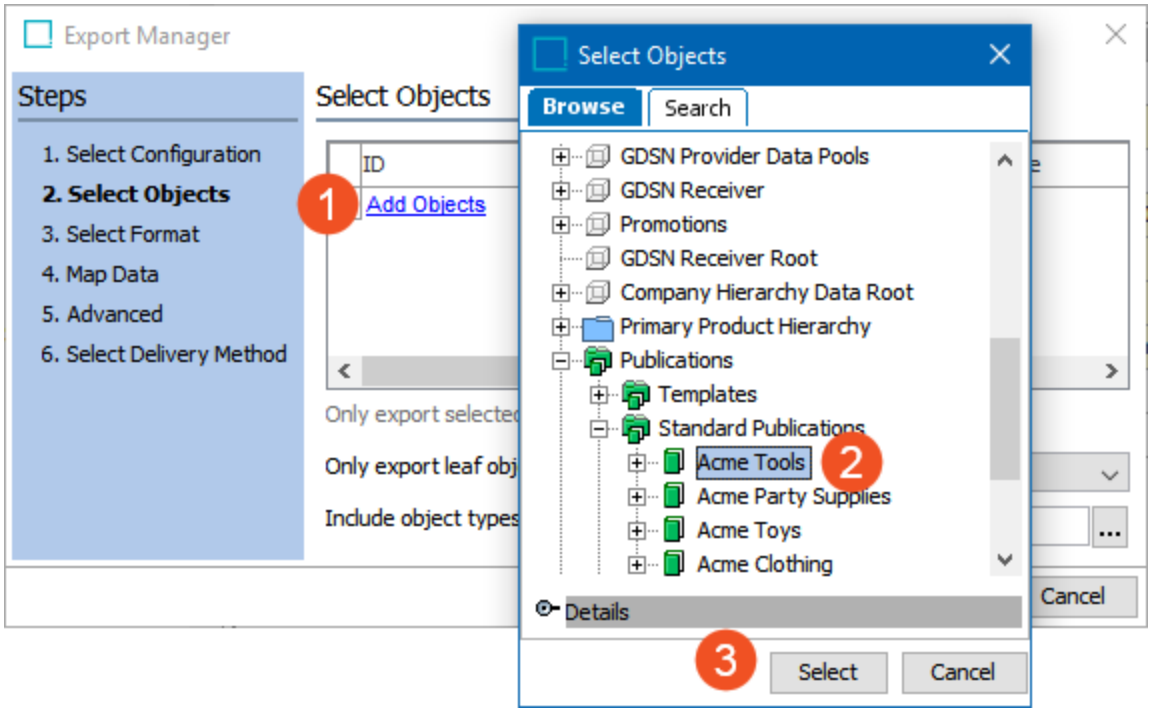
Note: This topic assumes a basic familiarity with the STEP Export Manager. For full details on Export Manager functionality, see the **Export Manager** section of the **Data Exchange** documentation.

Exporting an Index Using the STEP Export Manager

1. In the workbench, navigate to File > Export > Data to launch the Export Manager. Select **Create New Export**, then click **Next**. Alternatively, you may right-click on the publication from which you want to export the index and click **Export Data Below**.

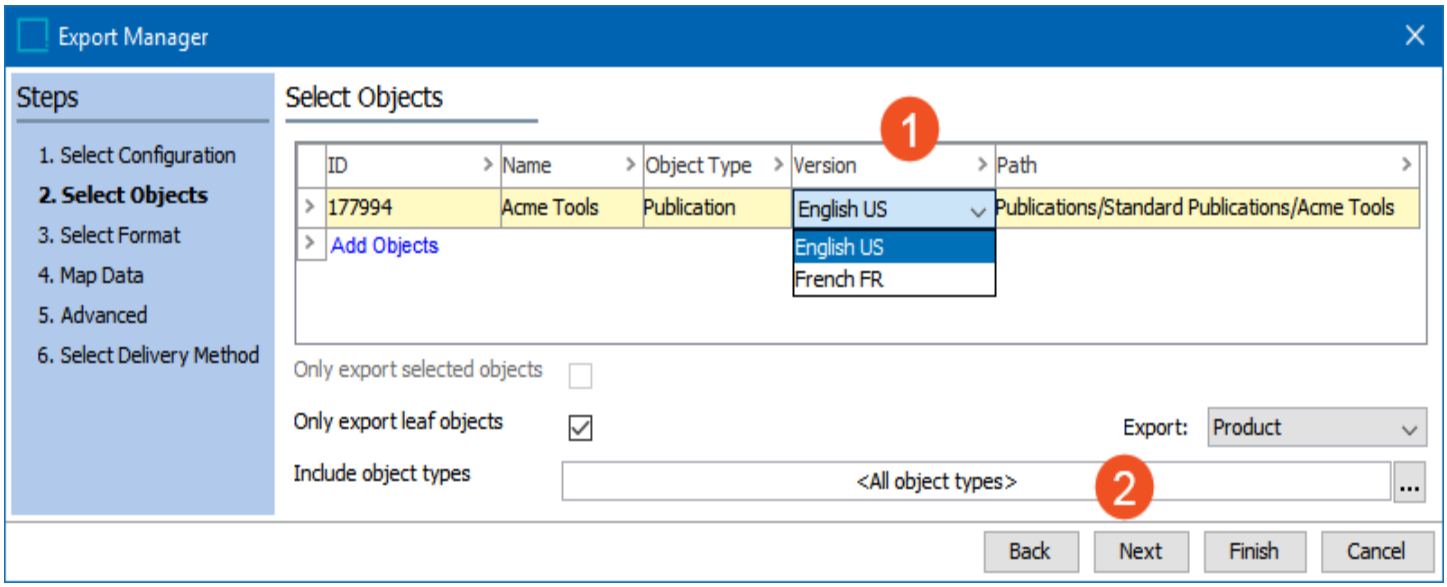


2. In step 2 (Select Objects), define the publication from which you would like to export the index. Click **Add Objects**, search for or browse to the relevant publication in the **Select Objects** dialog, then click **Select**.

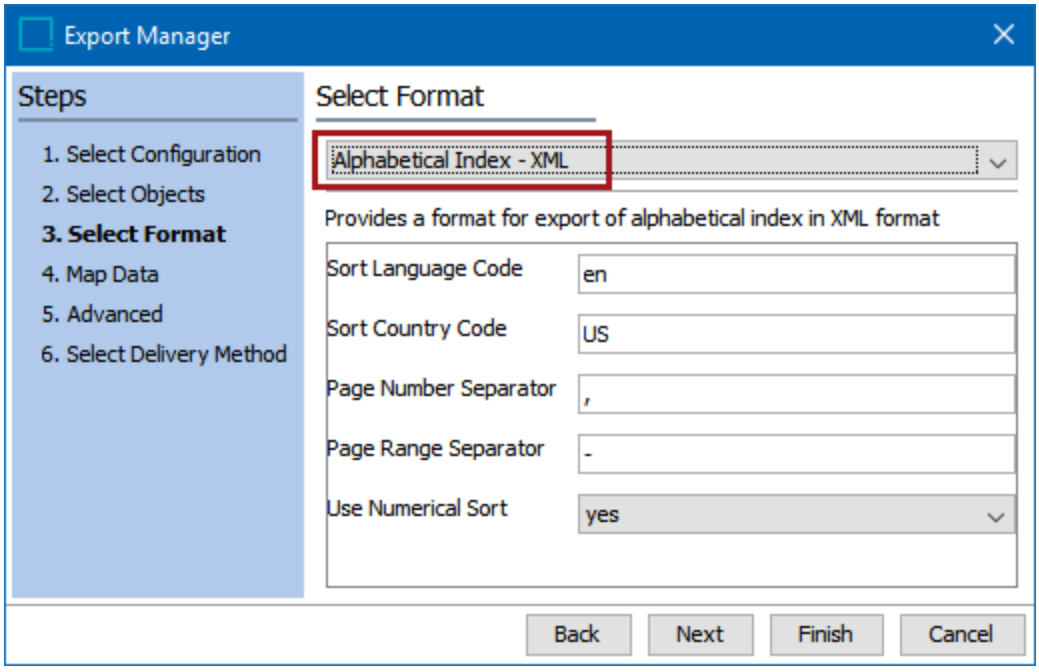


3. To define the publication **version** from which you want to export your index, select the relevant version from the dropdown list in the **Version** column, then click **Next**.

Note: 'Product' should be selected from the **Export:** dropdown, not 'Publication Objects'. Also, it does not matter if 'Only export leaf objects' is checked. Since the export will be in XML format, this option is ignored.



4. In step 3 (Select Format), choose **Alphabetical Index - XML** from the dropdown list.



5. Configure the remaining options in step 3 as follows:

- **Sort Language Code:** This is a free-text field. Enter the two-letter lowercase ISO 639-1 language code on which you would like to sort the index words. The default selection is **en**. A full list of codes can be found on the web.
- **Sort Country Code:** This is a free-text field. Enter the two-letter uppercase ISO-3166 country code on which you would like to sort the index words. The default selection is **US**. A full list of codes can be found on the web.
- **Page Number Separator:** This defines what character should be placed between page numbers if a product appears on more than one page in the publication. This is typically a comma with a space added after.
- **Page Range Separator:** This defines what character should be placed between page numbers if a product appears on more than one consecutive page. This is typically a hyphen with no space on either side.
- **Use Numerical Sort:** Select **yes** to sort numerical entries in ascending numerical order:
    - 100
    - 200
    - 1002345
    - 1003456
    - 2001234

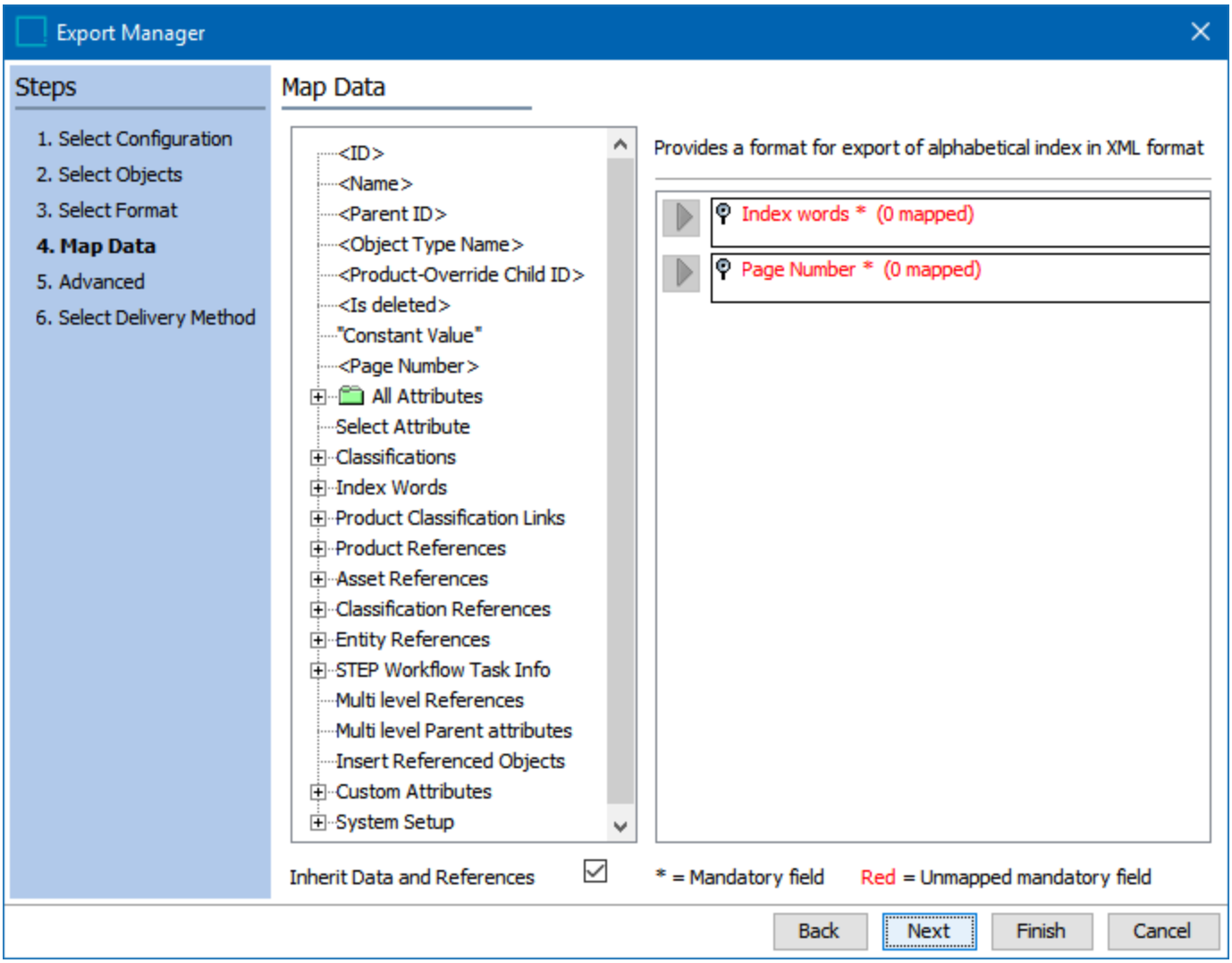
  Select **no** to sort numerical entries on the first number, as follows:
    - 100
    - 1002345
    - 1003456
    - 200
    - 2001234

6. Click **Next** to move to step 4, **Map Data**.

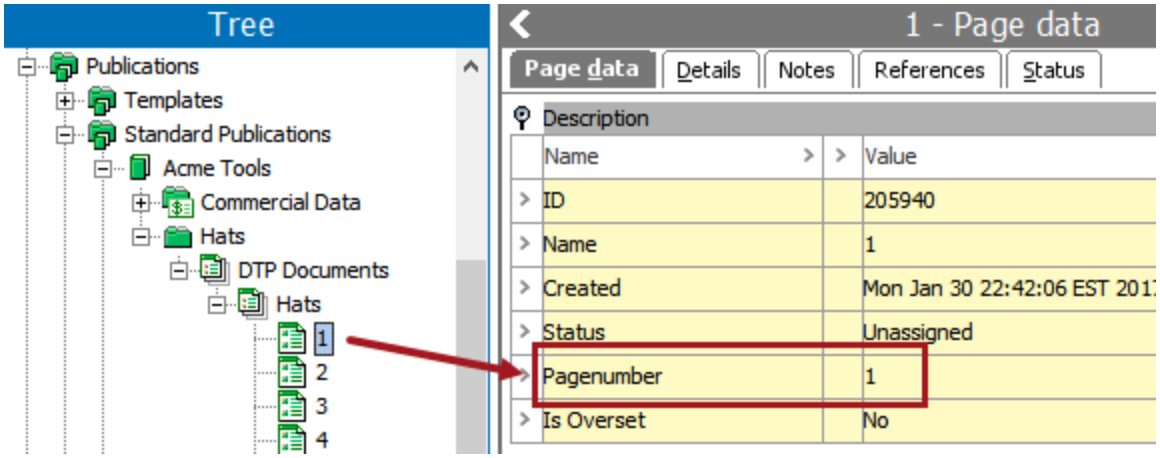
Mapping Index Data

The next step in configuring the index export is to map the data, which occurs in step 4 of the Export Manager, **Map Data**.

All indexes must contain at least two elements—an **index word** and a **page number**.



Page number is not mapped as an attribute, since page numbers are automatically populated from InDesign pages after they are saved to STEP.

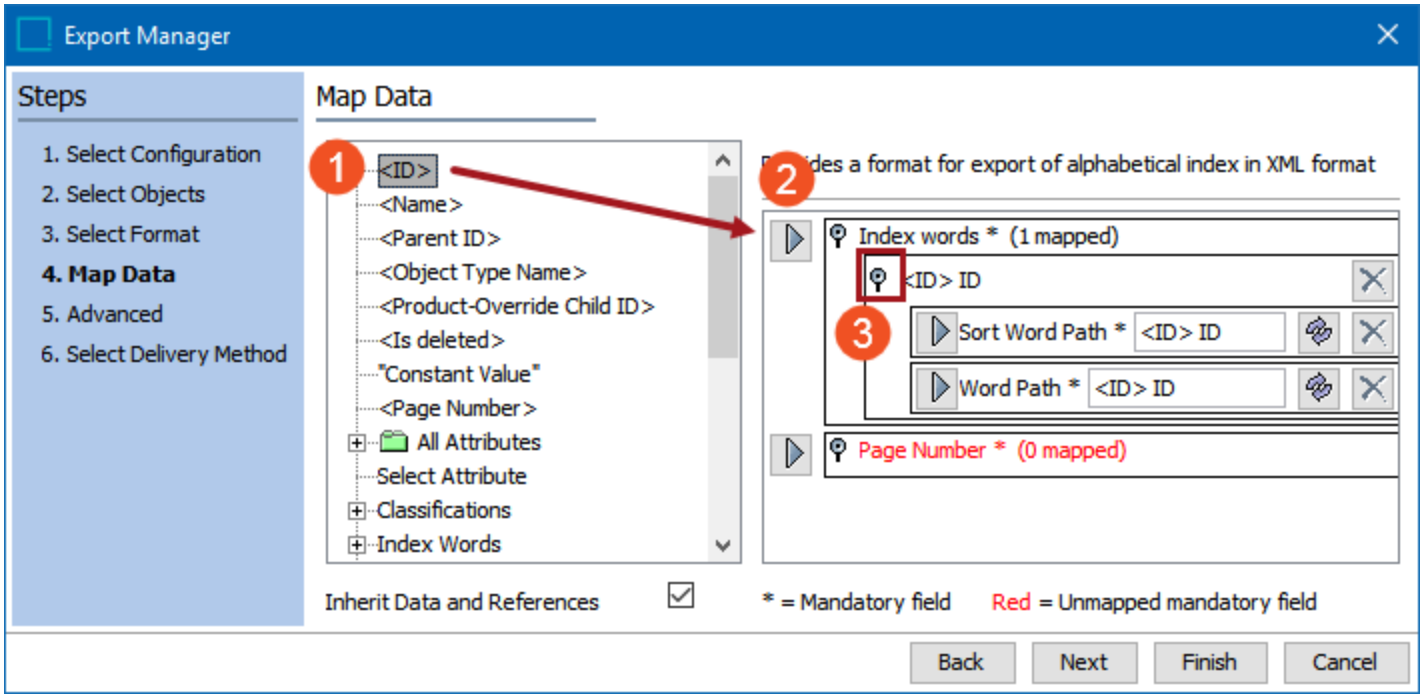


Mapping a Basic Stock Number Index

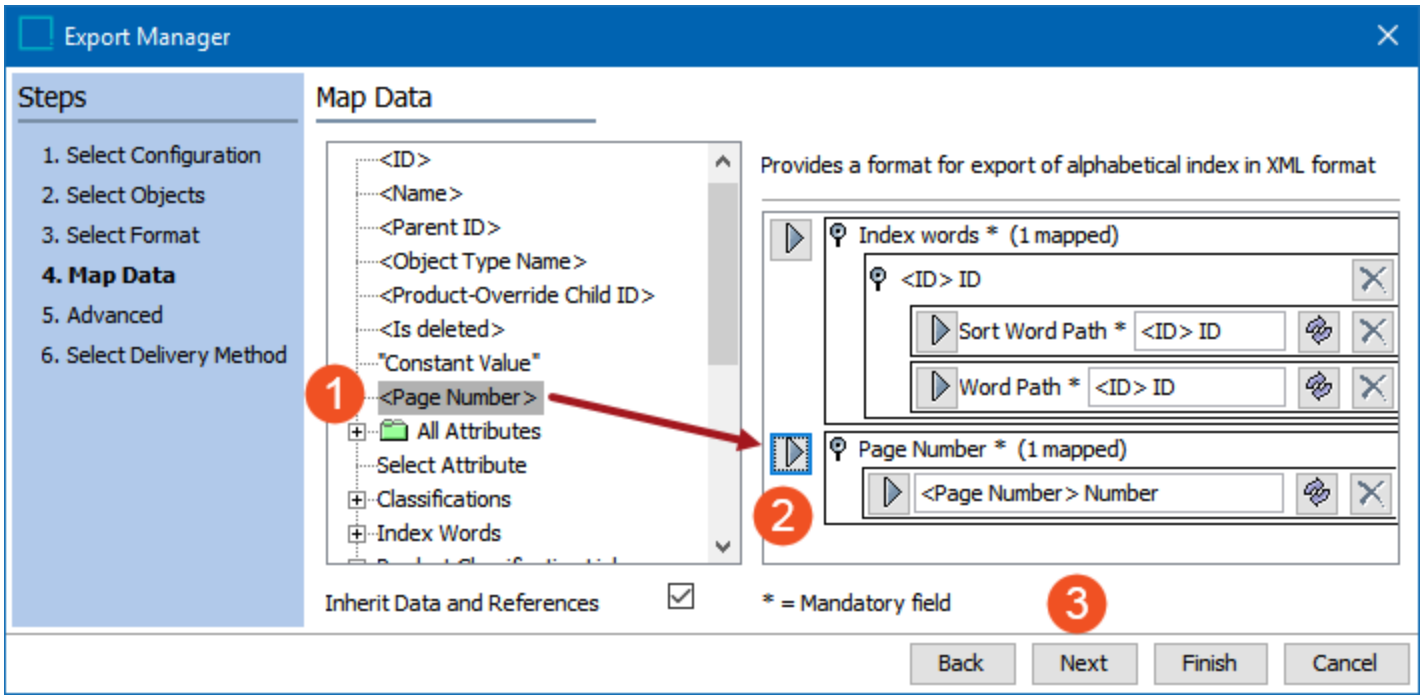
The **index word** in a basic stock number index is typically a part number or a catalog number. This can either be an attribute, a STEP ID, or a STEP name. For this example, the STEP **ID** will be used as the index word.

1. On the **Map Data** screen of the Export Manager (step 4), select **<ID>**, then click on the arrow directly to the left of the **Index words** flipper.
2. Expand the <ID> flipper to display the **Sort Word Path** and **Word Path**. Leave these as-is.

   Sort Word Path denotes the content that the Index is sorted by—in this case, the ID of the products. **Word Path** is the content that is actually being pulled into the index—in this case, also the ID of the products.



3. Select **<Page Number>**, then click on the arrow directly to the left of the **Page Number** flipper. Click **Next**.



4. To complete the export of the stock number index, see the last section in this topic, 'Completing the Index Export'.

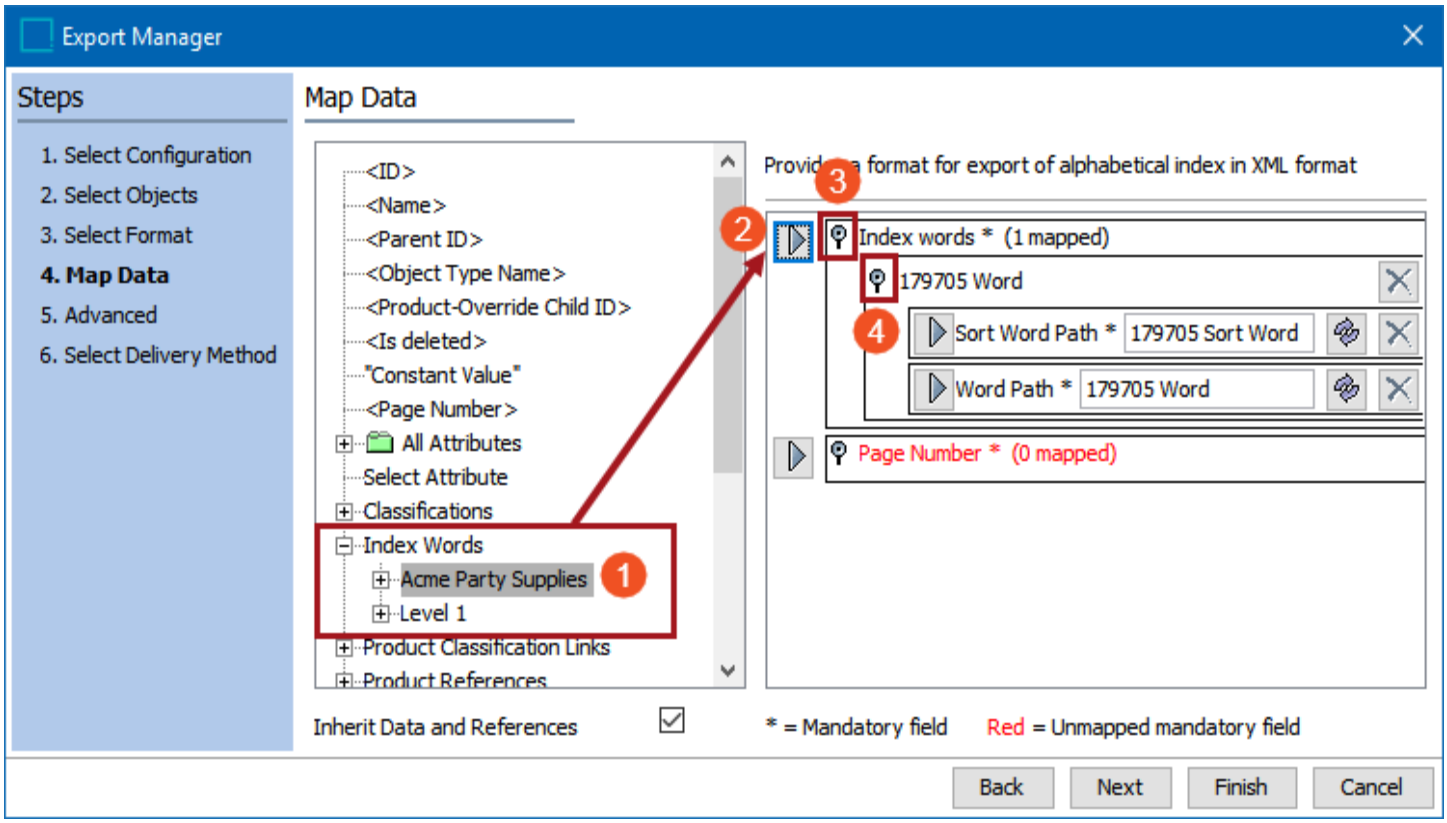
Mapping an Alphabetical Index

Mapping an alphabetical index is more in-depth than mapping a basic stock number index, as more considerations are made for index words and translated content.

The **index words** in an alphabetical index are pulled from the index words that are linked to the products mounted to the InDesign pages.

1. On the **Map Data** screen of the Export Manager (step 4), expand the **Index Words** hierarchy and select the relevant index hierarchy.
2. Click the arrow directly to the left of the **Index words** flipper.
3. Expand the **Index words** flipper
4. Expand the **Word** flipper to display the **Sort Word Path** and **Word Path**. The number in front of Word is the STEP ID of the selected index word hierarchy.

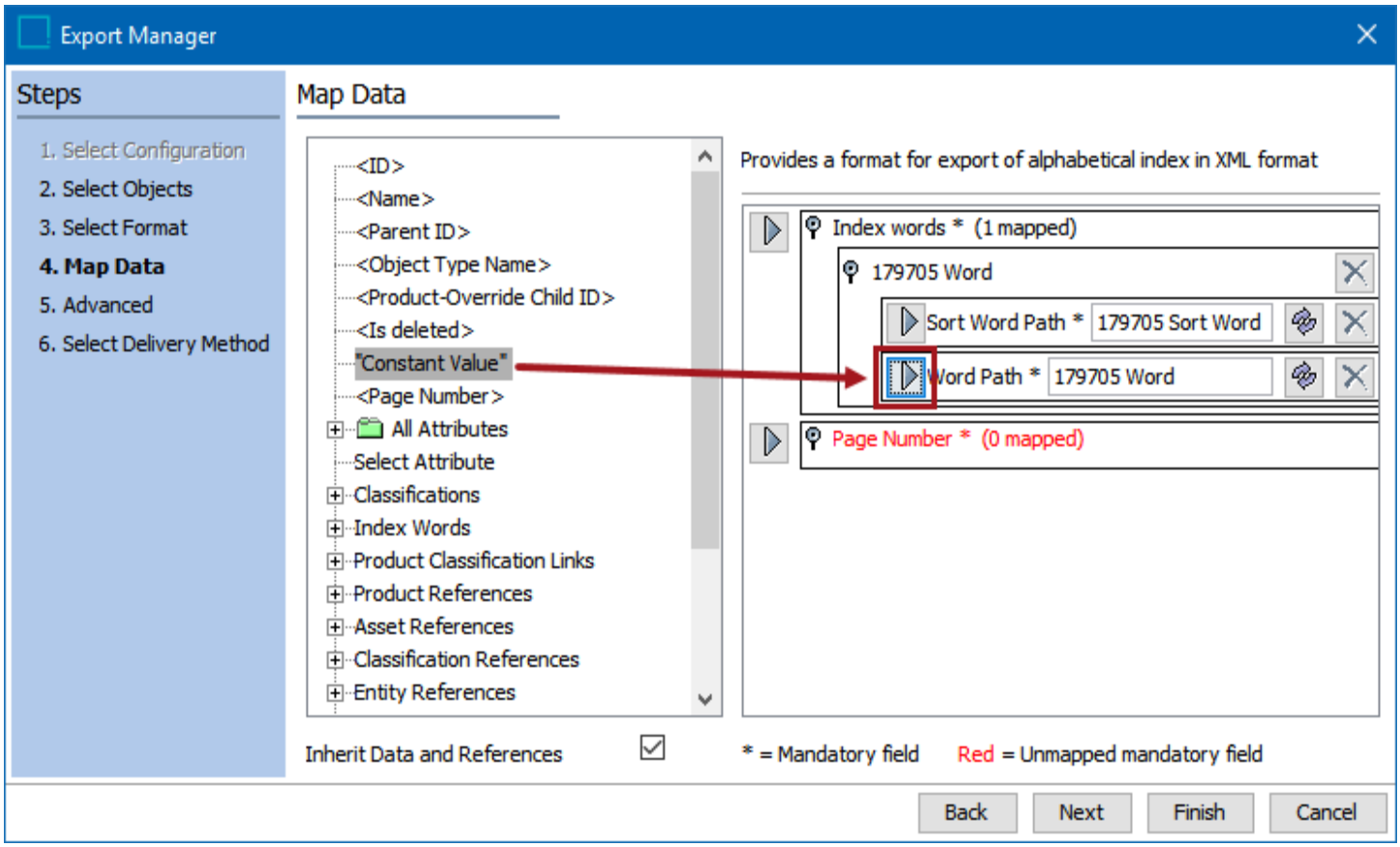
   Sort Word Path denotes the content that the Index is sorted by—in this case, the **sort word** attached to the index words. **Word Path** is the content that is actually being pulled into the index—in this case, the actual index words in the hierarchy. See the **Creating an Index Words Structure** topic for more information on sort words.



5. If your index will contain translated content, it is recommended to map a **constant value** in order to generate top-level **index letters**—1, 2, 3, A, B, C, and so forth. For example, in English, a product named 'Black chair' would be listed under the letter B, but in Germany, the same product would be named 'Schwarz stuhl' and would need to be listed under the letter S. This enables you to use a single dimension-dependent index words hierarchy that is translated instead of having a separate hierarchy for English, a separate hierarchy for German, and so forth.

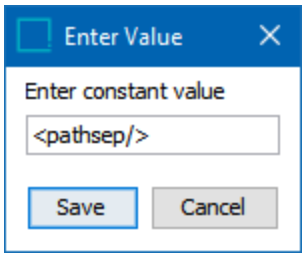
   If there is no chance that the contents of your publication will be translated, it is acceptable to *not* map a constant and instead use letters as the **Level 1** index word, as shown throughout the **Creating an Index Words Structure** topic.

6. Select **"Constant Value"** under Map Data, then click the arrow to the left of Word Path.



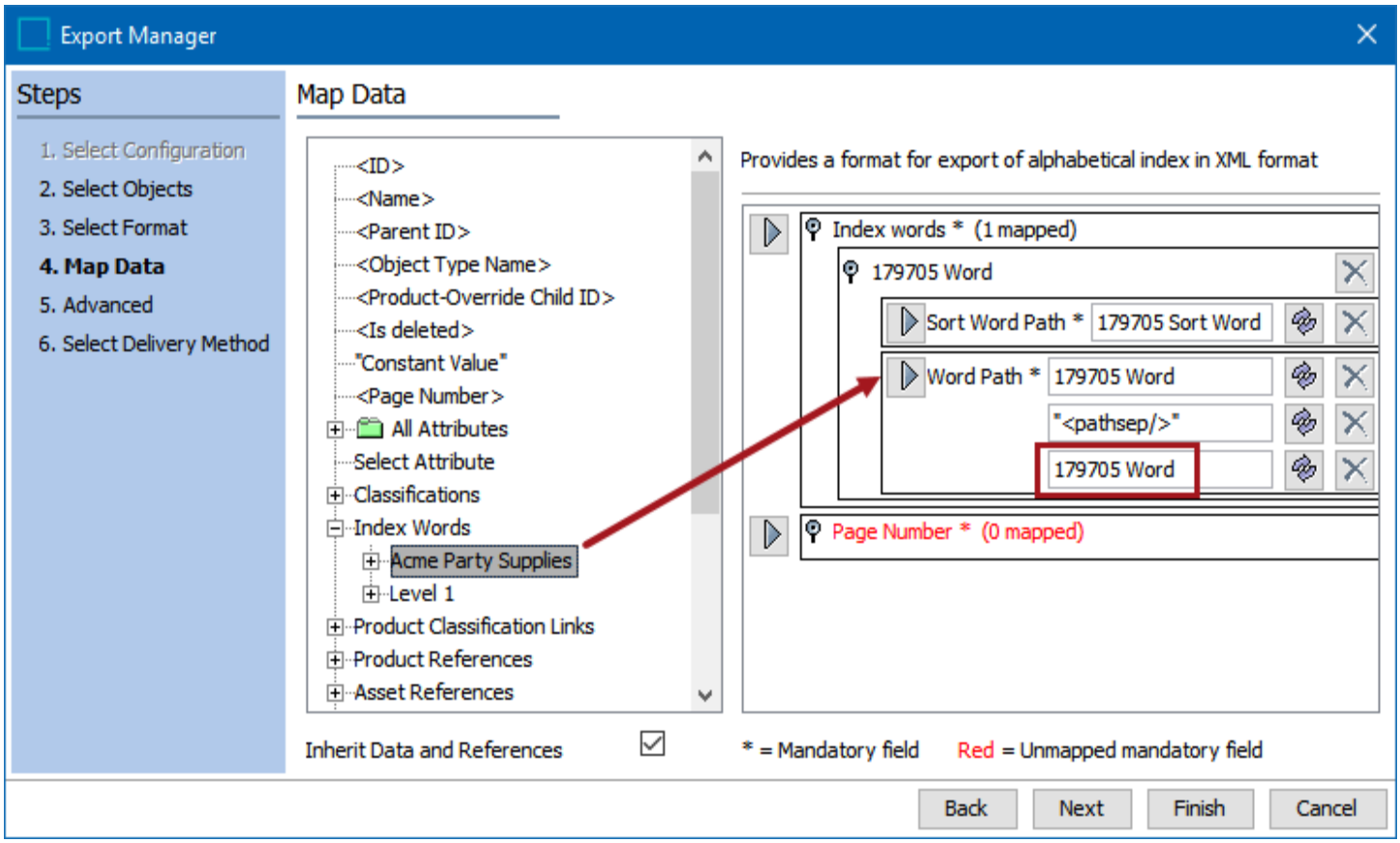
7. On the **Enter Value** dialog that displays, enter the string <pathsep/>, then click **Save**.

   The constant <pathsep/> is used to identify each individual index letter and ensures that the same index letter is only shown once.



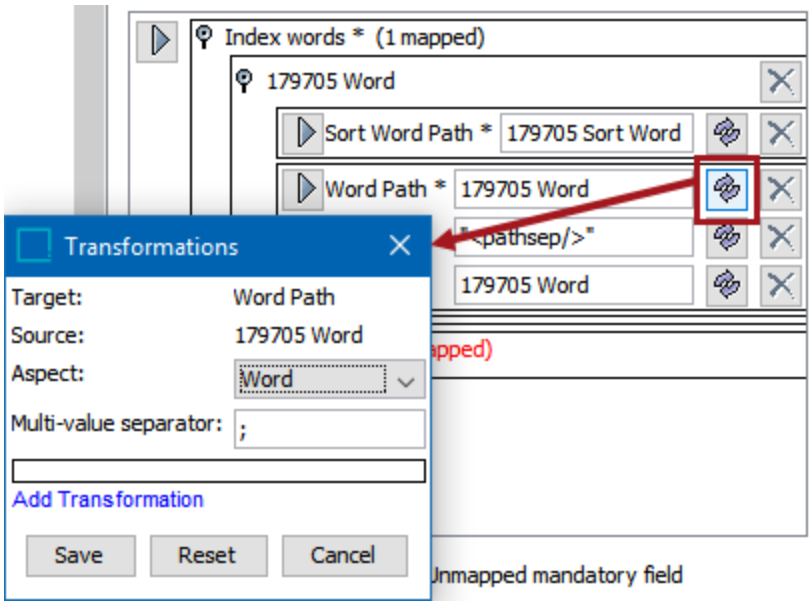
8. Next, the index hierarchy must be mapped to the Word Path again. The first mapped index will be used to extract the index letters from the index words through a transformation (see step 10). The second mapped index will be used to extract the index words themselves.

   Select the relevant index hierarchy again from beneath Map Data, then click on the arrow to the left of Word Path to map the index hierarchy a second time.

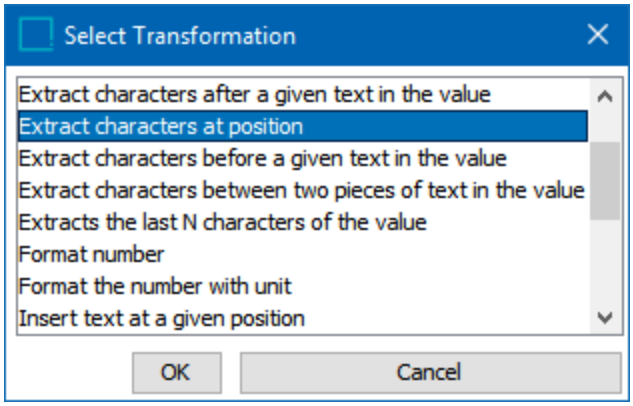


9. Next, a **transformation** must be applied to the first mapped Index hierarchy to extract the first letter of each index word. This letter will be used as the index letter when a new letter begins in the index.

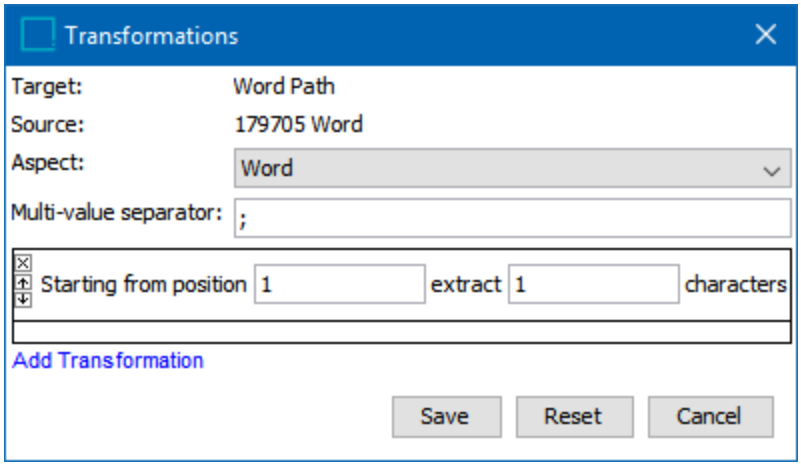
   Click on the transformations icon to the right of the first Word Path field to display the **Transformations** dialog.



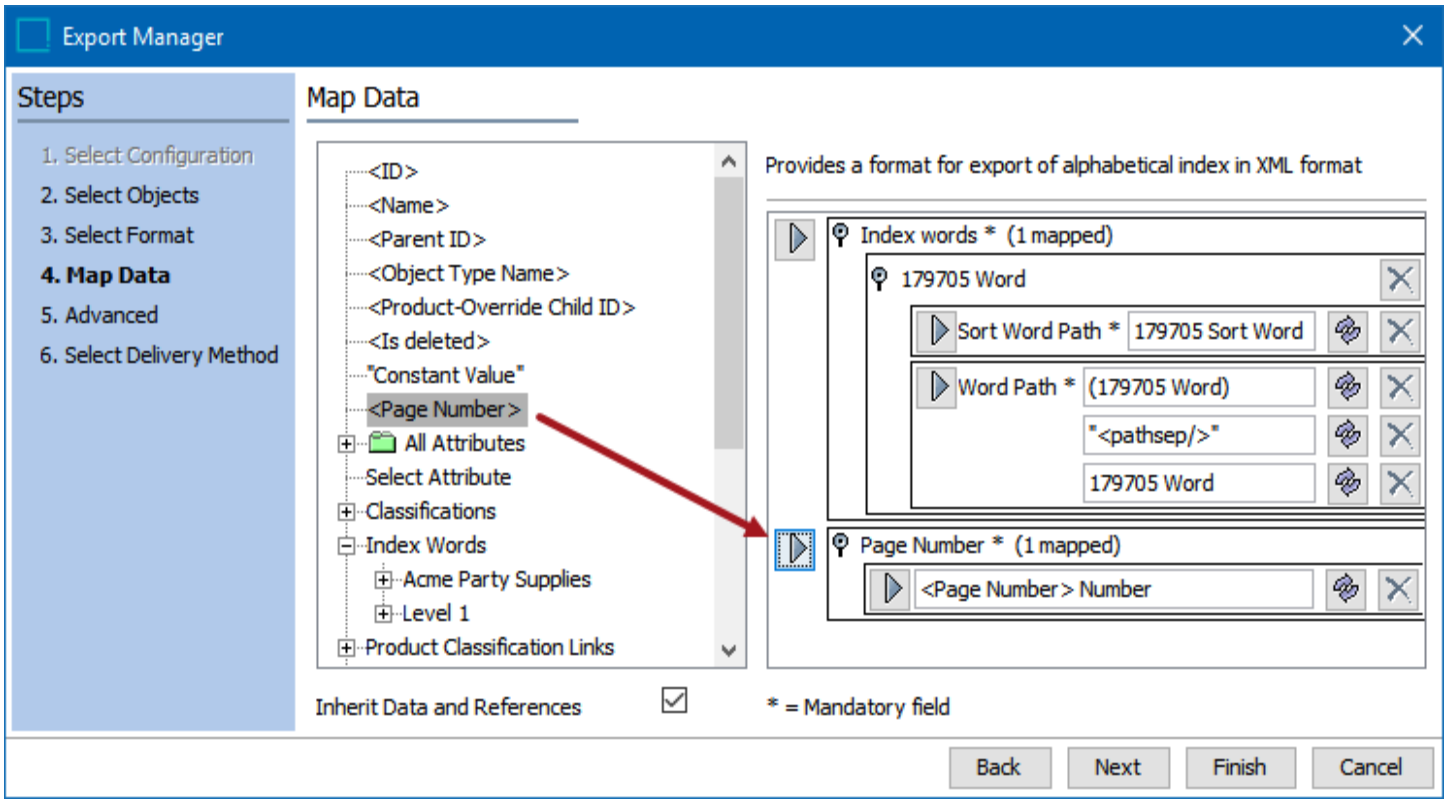
10. Click 'Add Transformation' to display the **Select Transformation** dialog.
11. Select 'Extract characters at position' from the list of transformations, then click **OK** to return to the Transformations dialog.



12. Enter a '1' in both the 'Starting from position' and 'extract' fields, then click **Save**.



13. Last, map the Page Number by clicking **<Page Number>** and clicking the arrow next to Page Number, then click **Next**.



Completing the Index Export

Once you have completed your index mappings, follow these steps to complete the index export from STEP. The following steps describe basic Export Manager functionality and are not unique to the Alphabetical Index - XML format.

1. After clicking **Next** on the **Map Data** screen of the Export Manager (step 4), you are taken to the **Advanced** screen (step 5). All options may be left as-is. Click **Next**.
2. On the **Select Delivery Method** screen (step 6), choose **File** from the dropdown, then click **Finish**.
3. On the **Save Export Configuration** dialog, select 'Save Options' to save the Index Export configuration, which is recommended. Click the ellipsis button (...) by the **Save to** window and choose a classification folder in which to store your export configuration. A typical location is Configurations > Export Configurations.

> **Note:** For more information on saving export configurations, see the **Running a Data Export** section of the **Export Manager** documentation.

4. Click **OK** to begin the Export Process, then click **Go to Process** to go to the BGProcesses tab and retrieve the file once the export is completed. The file is exported as XML.
5. Save the XML file to a location of your choosing on your hard drive.

Once these steps are completed, the XML file is ready to be formatted and imported into InDesign. For instructions on next steps, see the **Formatting and Mounting an Index in InDesign** topic.

Formatting and Mounting an Index in InDesign

Once the Index XML has been exported from STEP, the next steps are as follows:

1. Format the XML file
2. Create the index mounting page
3. Configure the paragraph and character styles within the mounting page
4. Import the XML file into InDesign
5. Mount the index onto the page
6. Apply final formatting to the index

Formatting the Index XML File

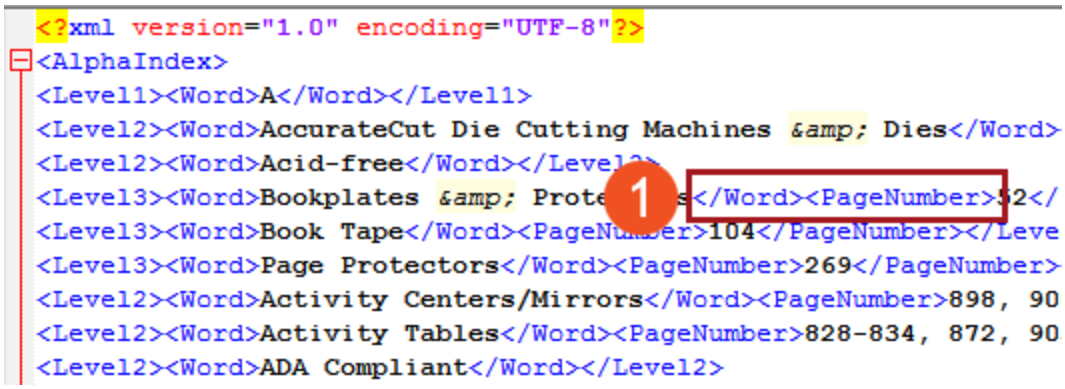
The typical desired end result for a mounted index is to have what is known as **dot leaders** to separate the index words from their corresponding page numbers. For example:

```
Laser Printer ........1
Inkjet Printer .......2
```

Dot leaders are not placed into the XML file itself. Instead, a special character—typically a # symbol—is added to the XML file, and this symbol will later be replaced in InDesign with a tab character that will generate the dot leaders. This process is explained later in this topic in the 'Replacing Special Characters With Dot Leaders on the InDesign Page' subsection.

To add the special character to the index XML:

1. Open the XML file in the XML editor of your choice, such as UltraEdit or Notepad++.
2. In the XML file, find all instances of the string **</Word><PageNumber>** and replace them with **</Word>#<PageNumber>**.



```
<?xml version="1.0" encoding="UTF-8"?>
<AlphaIndex>
<Level1><Word>A</Word></Level1>
<Level2><Word>AccurateCut Die Cutting Machines &amp;amp; Dies</Word>#
<Level2><Word>Acid-free</Word></Leve
<Level3><Word>Bookplates &amp;amp; Prot s</Word>#<PageNumber>52</
<Level3><Word>Book Tape</Word>#<PageNumber>104</PageNumber></Leve
<Level3><Word>Page Protectors</Word>#<PageNumber>269</PageNumber>
<Level2><Word>Activity Centers/Mirrors</Word>#<PageNumber>898, 90
<Level2><Word>Activity Tables</Word>#<PageNumber>828-834, 872, 90
<Level2><Word>ADA Compliant</Word></Level2>
```

3. Save the file.

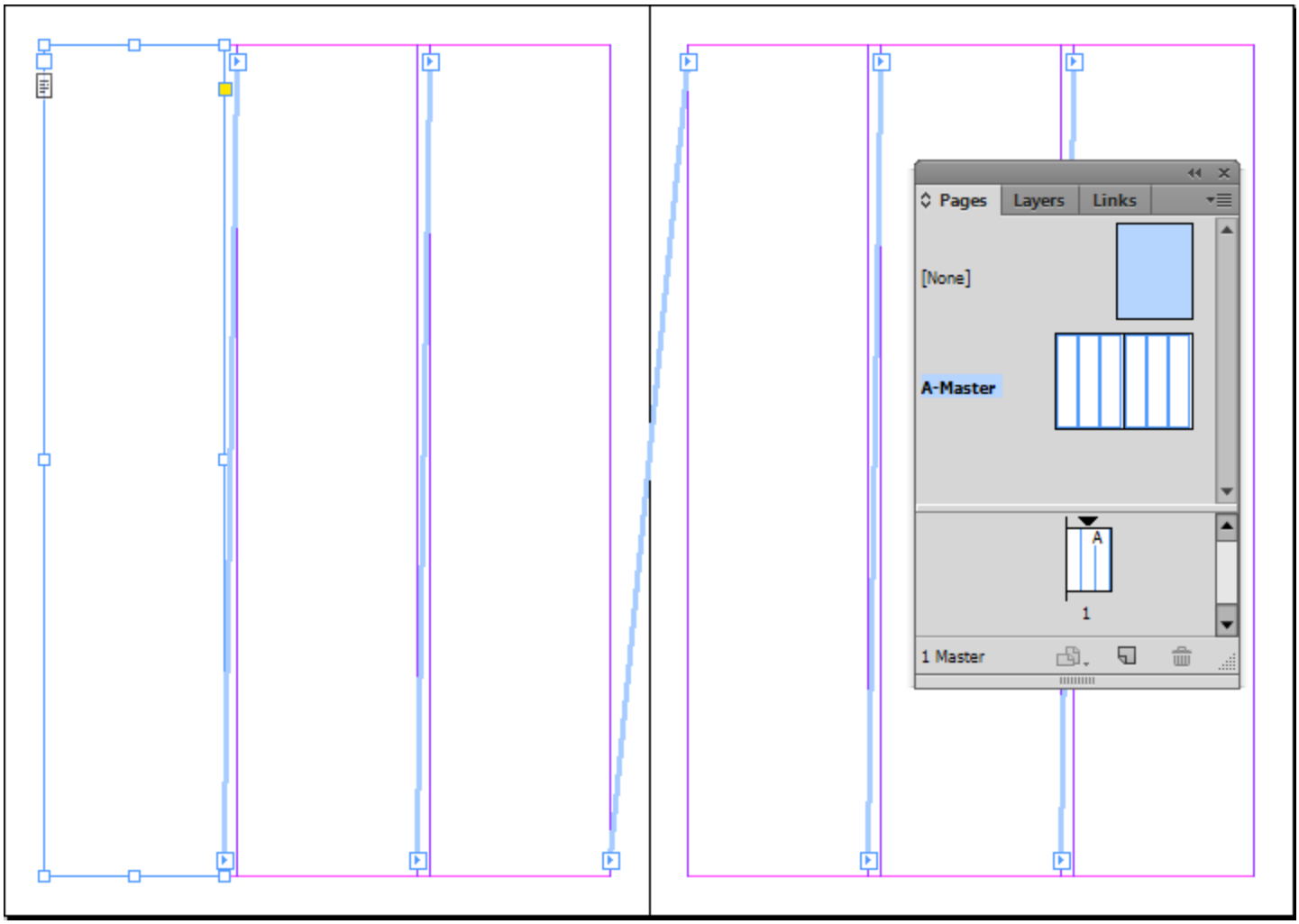
Configuring the Index Mounting Page

The recommended practice for index mounting pages is to create an InDesign document that contains columns with threaded text frames on the master pages.

Note: A mounting page for an index is *not* a publication template.

The following screenshot shows an index mounting page with three text columns threaded to one another on the master page. Placing text frames on the master eliminates the need to draw a text frame on the page when mounting an index, as the frames will be automatically created. This setup is ideal for lengthy indexes, as new text frames and pages are automatically created as the index mounts.

Since this type of document is created using standard InDesign functionality, instructions on how to create the document itself are outside the scope of STEP documentation. Refer to Adobe InDesign's help documentation for more information. However, the information is presented to illustrate the recommended document setup for mounting indexes generated from STEP.



Configuring InDesign Paragraph and Character Styles for Indexes

The index mounting page must also have InDesign paragraph styles and character styles configured to properly format the different levels of the index.

Note: This topic does not explain how to create InDesign paragraph styles and character styles themselves; see the **Publication Template Layout, Formatting, and Styles** topic for more information.

As illustrated in the **Creating an Index Words Structure** topic, there are multiple levels to index words—Level 1, Level 2, and so forth.

Index Words

Inherited From	Index	Level 1	Level 2	Level 3	Level 4
Locally defined	Acme Party Supplies	H	Hats	Birthday Hats	Sweet 16
Add Index Word					

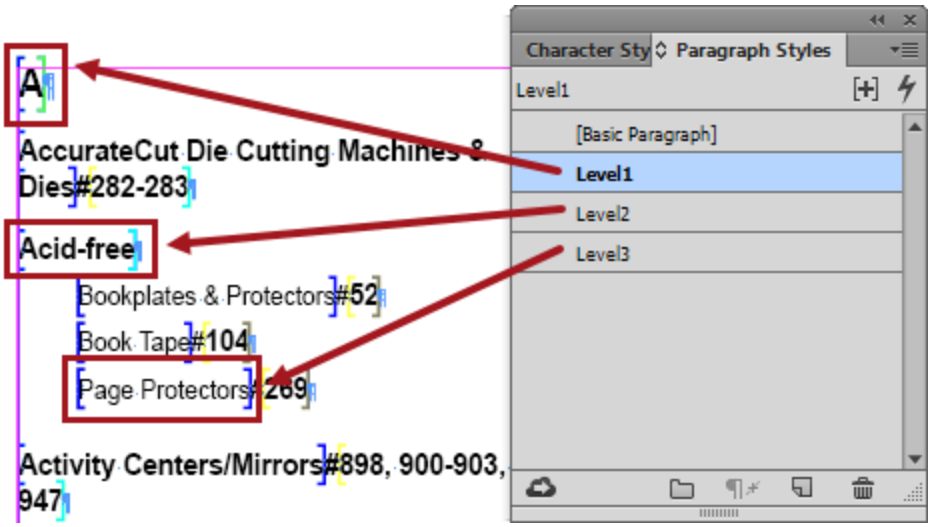
In the index XML, these levels have corresponding **tags**. Level1 corresponds to the <Level1> tag, PageNumber corresponds to the <PageNumber> tag, and so forth.

```
<?xml version="1.0" encoding="UTF-8"?>
<AlphaIndex>
 <Level1><Word>A</Word></Level1>
 <Level2><Word>AccurateCut Die Cutting Machines &amp;amp; Dies</Word>#<PageNumber>282-283</PageNumb
 <Level2><Word>Acid-free</Word></Level2>
 <Level3><Word>Bookplates &amp;amp; Protectors</Word>#<PageNumber>52</PageNumber></Level3>
 <Level3><Word>Book Tape</Word>#<PageNumber>104</PageNumber></Level3>
 <Level3><Word>Page Protectors</Word>#<PageNumber>269</PageNumber></Level3>
 <Level2><Word>Activity Centers/Mirrors</Word>#<PageNumber>898, 900-903, 939, 947</PageNumber><
 <Level2><Word>Activity Tables</Word>#<PageNumber>828-834, 872, 903, 945, 951, 956</PageNumber>
```

Paragraph Styles for Index Words

Each level of index words needs to have a corresponding paragraph style configured in InDesign, not only for the textual formatting but to place the dot leaders between the words and the page numbers. Recommended practice is to name the paragraph styles to match the tag names, though any naming can be used as long as the styles are correctly mapped to the tags. See the 'Mapping Styles After Importing the XML' section of this topic below for more information.

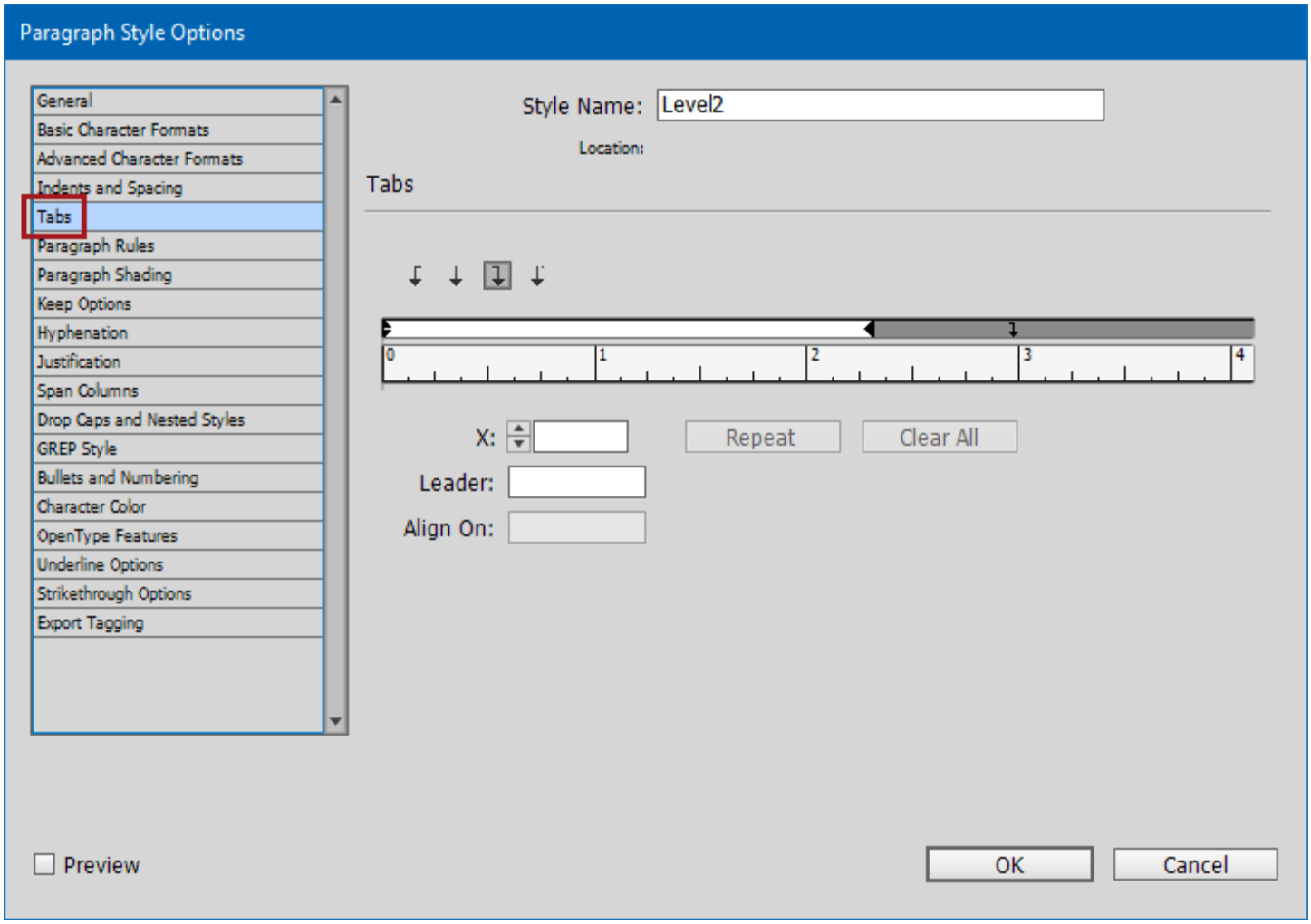
Formatting of the styles is up to the user, but the following screenshots show a common configuration. 'Level1' is a bold 12 pt font; 'Level 2' is a bold 9 pt font; and 'Level3' is a regular 8 pt font. The font sizes typically get smaller as the index levels go lower.



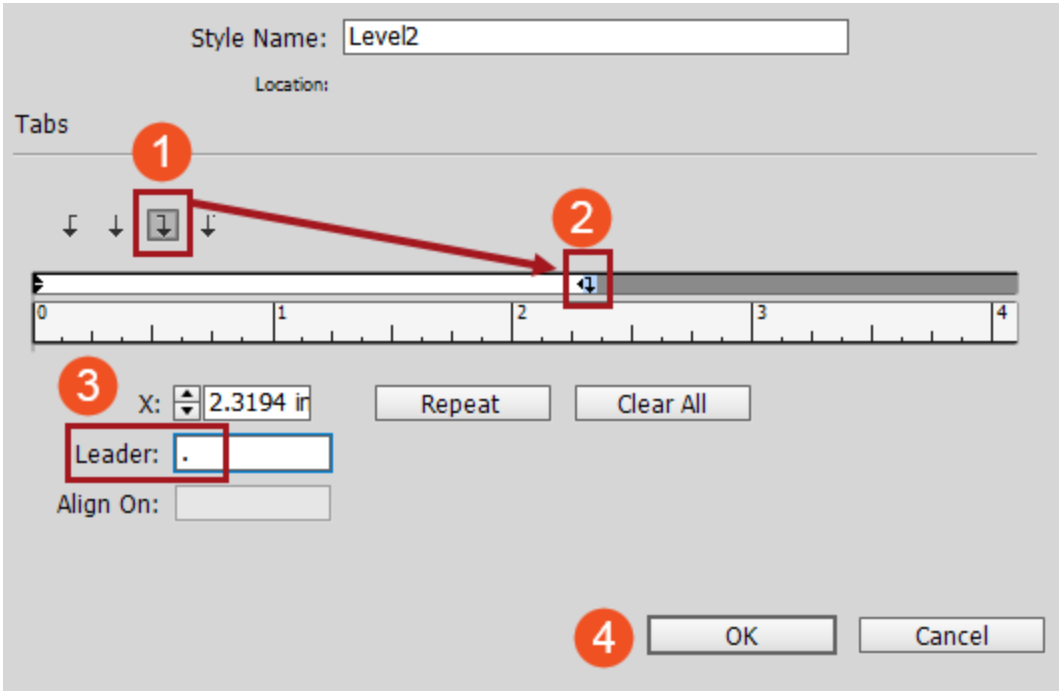
Creating Dot Leaders in Paragraph Styles

To place dots between the index words and page numbers in your index, you will need to configure **dot leaders**. Dot leaders are embedded into the **Tabs** area of InDesign paragraph styles and are configured as follows.

1. Open the InDesign **Paragraph Styles** panel (Window > Styles > Paragraph Styles, or F11), then double-click on the paragraph style that you would like to edit.
2. On the **Paragraph Style Options** dialog, click on **Tabs** in the left column.



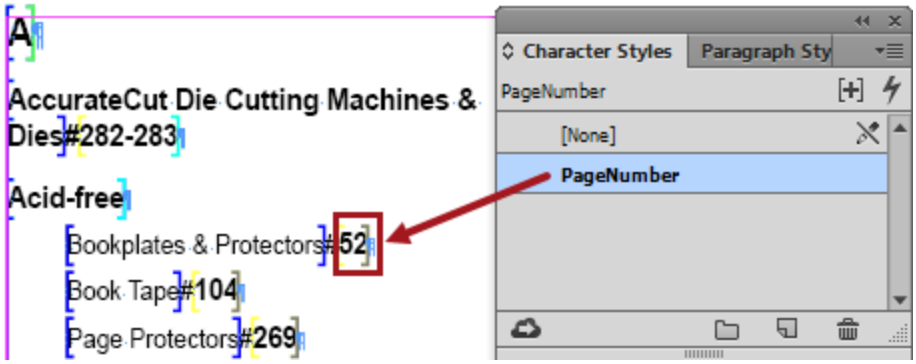
3. Under **Tabs** in the right panel, select the right tab icon (1 in the below screenshot), then click the white area above the ruler to place the tab. Drag the tab over until it aligns with the edge of the column (2 in the below screenshot).



4. Enter a period in the **Leader** field (3 in the above screenshot), then click **OK** (4).
5. The dot leader is now configured. Repeat the above steps for all other paragraph styles that should have a dot leader.

Character Styles for Page Numbers

Page numbers are frequently mounted using a character style, as it is common for the page number to be a different style than the index word immediately preceding it. In the below instance, the 'Level3' paragraph style is used to format the index word ('Bookplates & Protectors') and the character style 'PageNumber' is used to override the Level3 paragraph style with a 9 pt bold font for the page number.

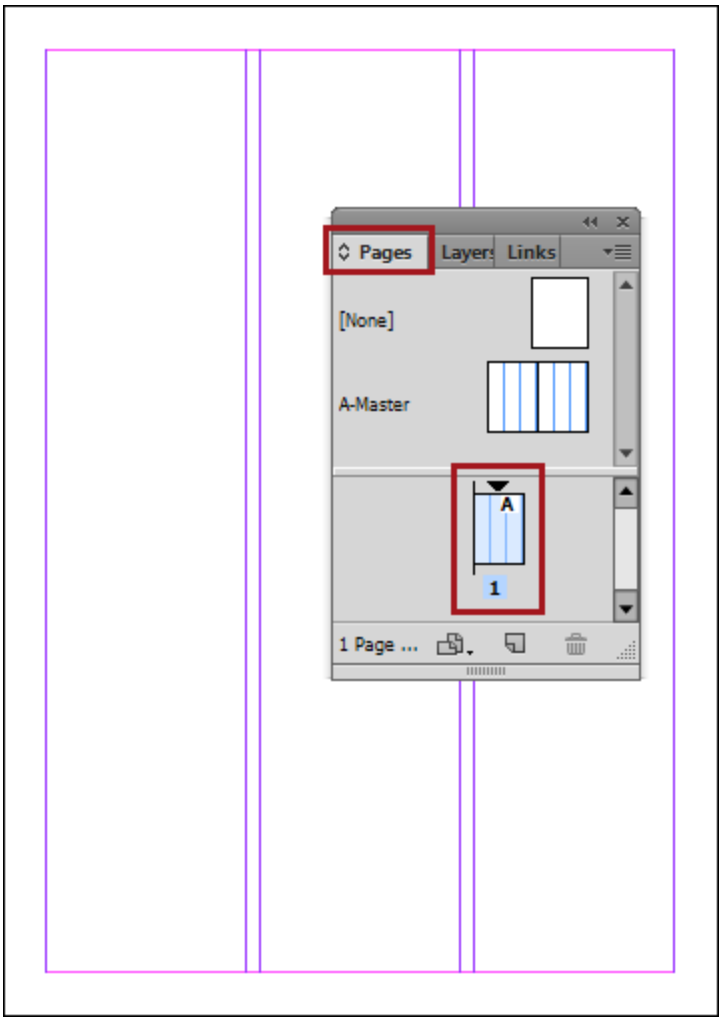


Importing an Index XML File Into InDesign

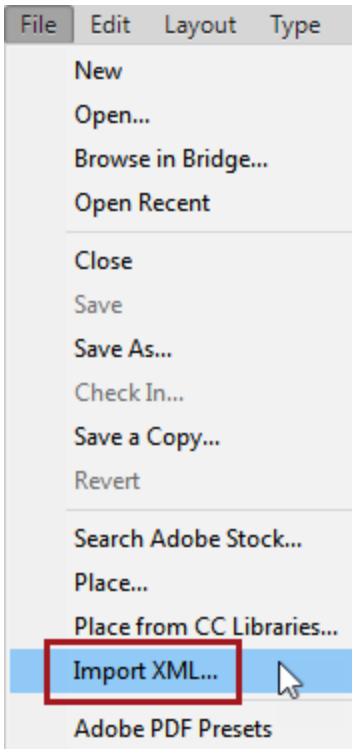
After formatting your index mounting page and the paragraph and character styles, the next step is to import the index XML file into InDesign. With your index mounting page open, follow these steps to import the index XML file.

1. Open the InDesign **Pages** panel (Window > Pages, or F12), then click on the **page** in the lower portion of the panel. Since indexes are not mounted on master pages, the page must be selected.

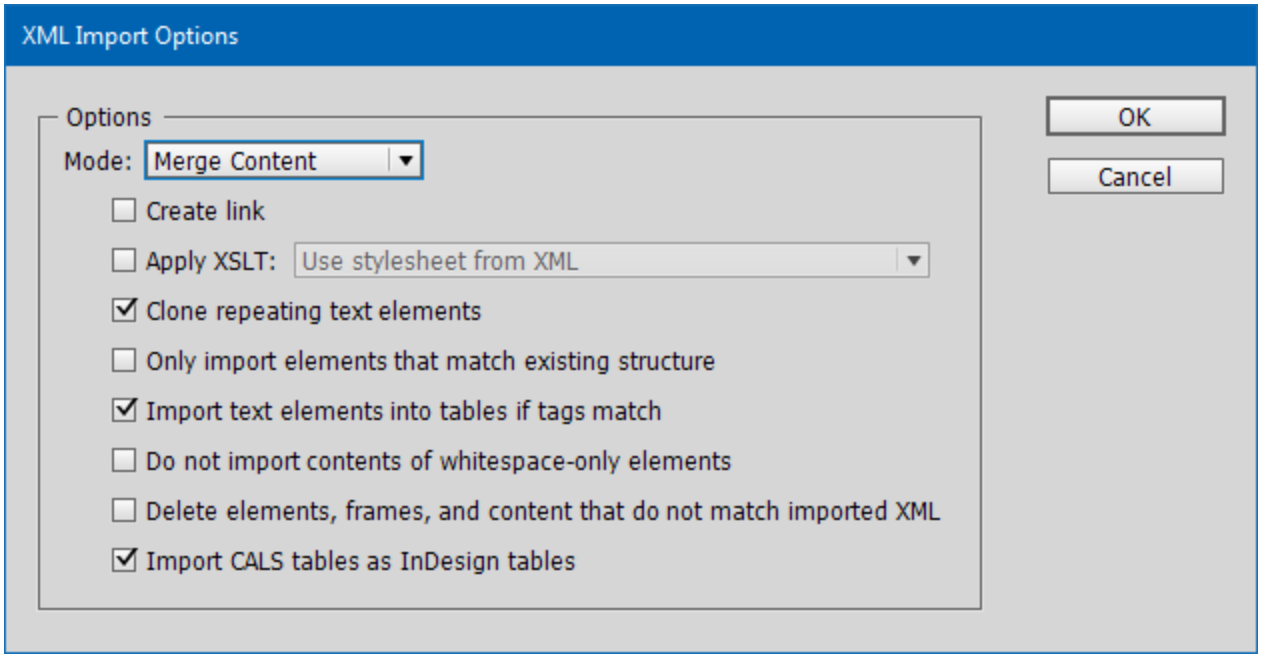
   Note: The master page must be applied to the page. In the below example, the A-Master master page has been applied to page 1.



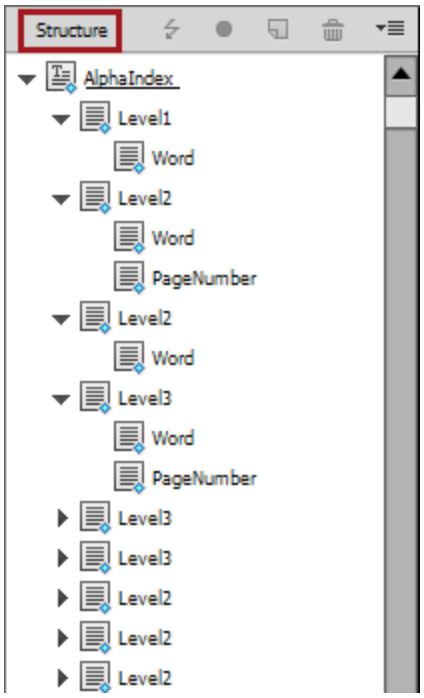
2. Navigate to File > **Import XML...** in the **File** menu to import the index XML file.



3. In the **Import XML** dialog that displays, locate the XML tile that you want to import, then click **Open**.
4. Click **OK** on the **XML Import Options** dialog that displays. All settings can be left as-is.



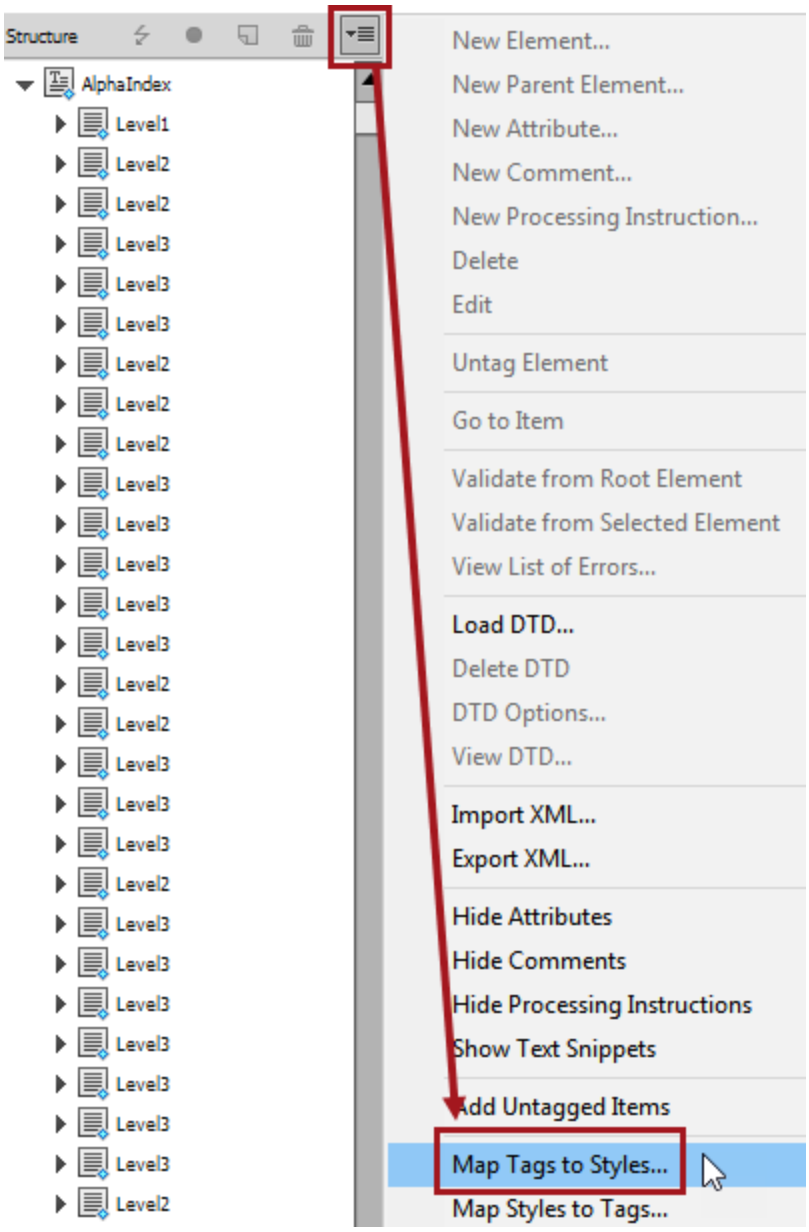
5. The index file (AlphaIndex) displays in the InDesign XML **Structure** window on the left-hand side of the InDesign interface.



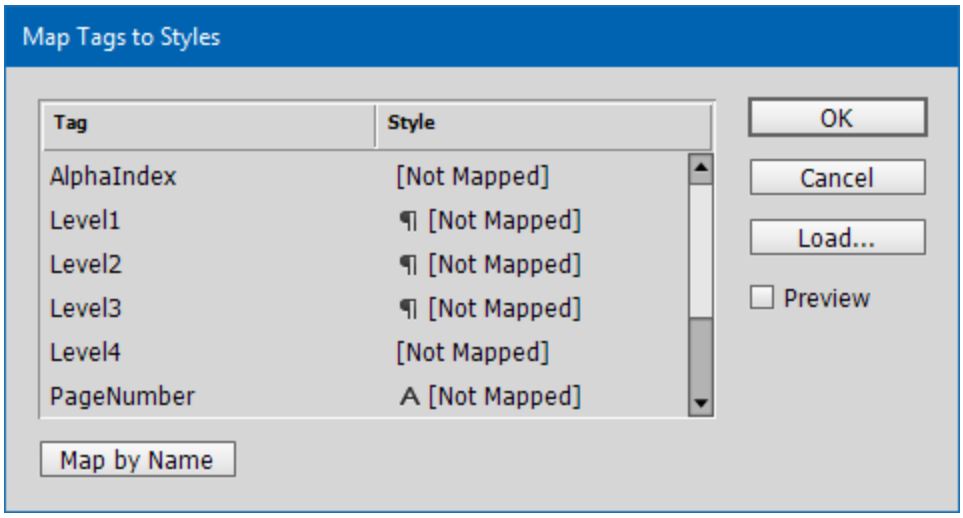
Mapping Styles After Importing the XML

After importing the index XML file, the next step is to map your paragraph and character styles to the XML tags contained within the index file. This mapping ensures that your index will be properly formatted and that styles can be applied automatically upon mounting.

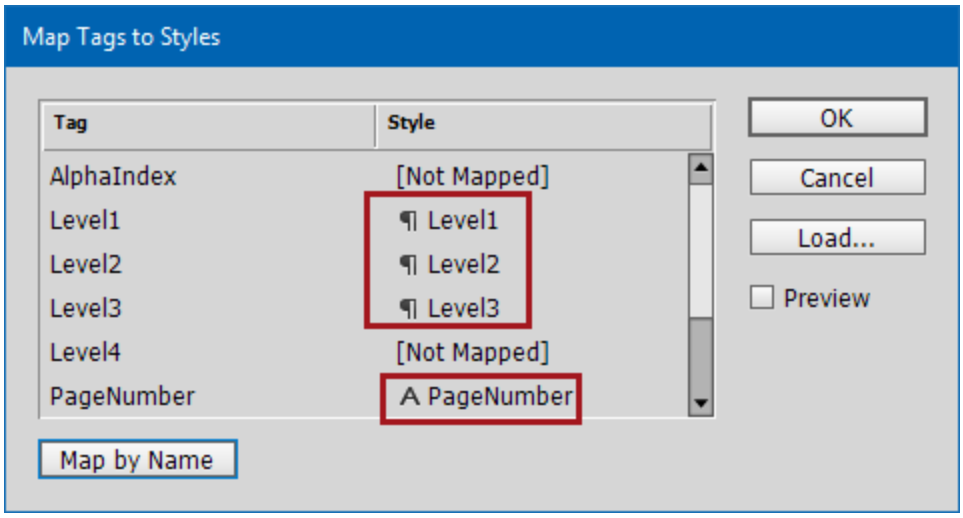
1. Click the **Options** menu in the upper right corner of the InDesign XML structure panel, then click **Map Tags to Styles**.



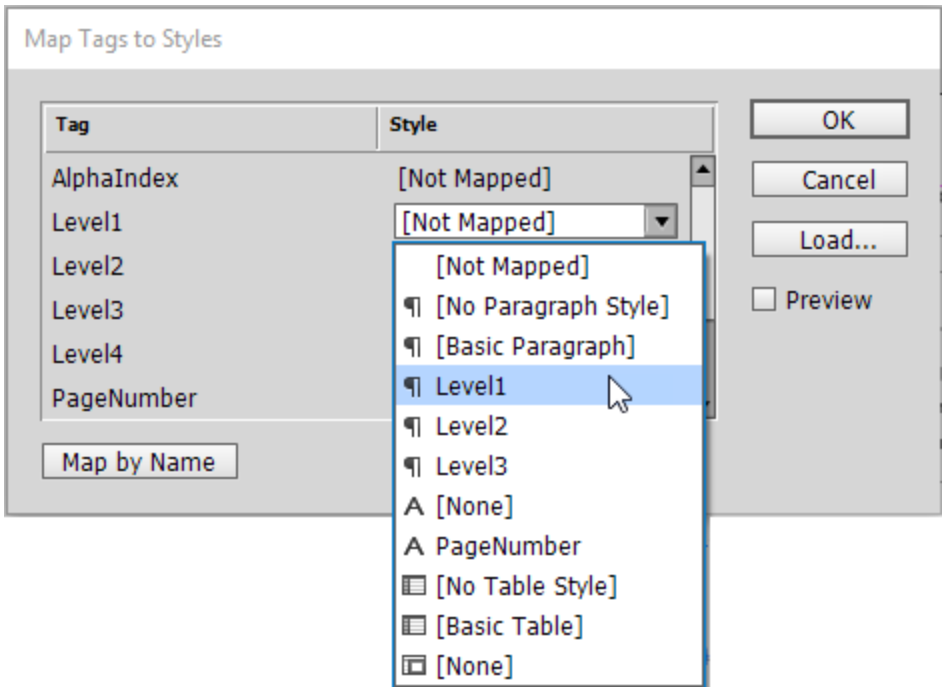
2. The **Map Tags to Style** dialog displays.



3. If your style names are identical to the tag names, click **Map By Name** to automatically map the tags to the styles, then click **OK**.



4. If your style names do *not* match the tag names, they must be mapped.
   - In the **Style** column of the **Map Tags to Styles** dialog, click on [Not Mapped] for each tag that you would like to map.
   - Select the relevant paragraph style or character style from the dropdown list.
   - Follow these steps for the remainder of styles that should be mapped.

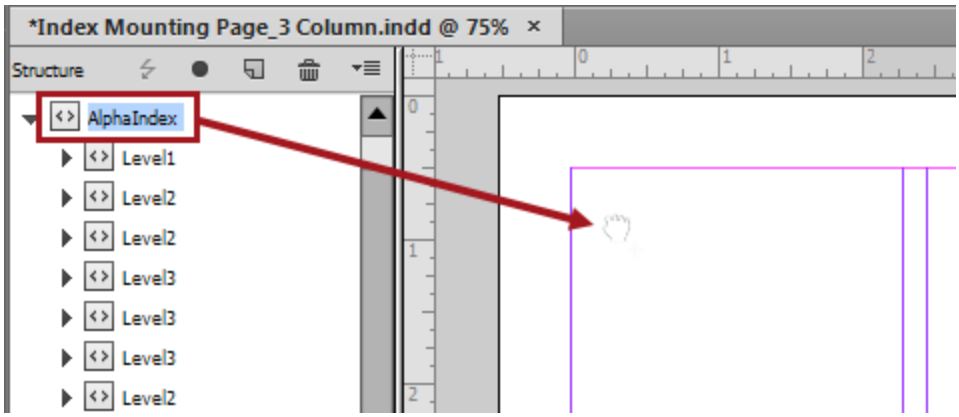


5. Click **OK** when complete.

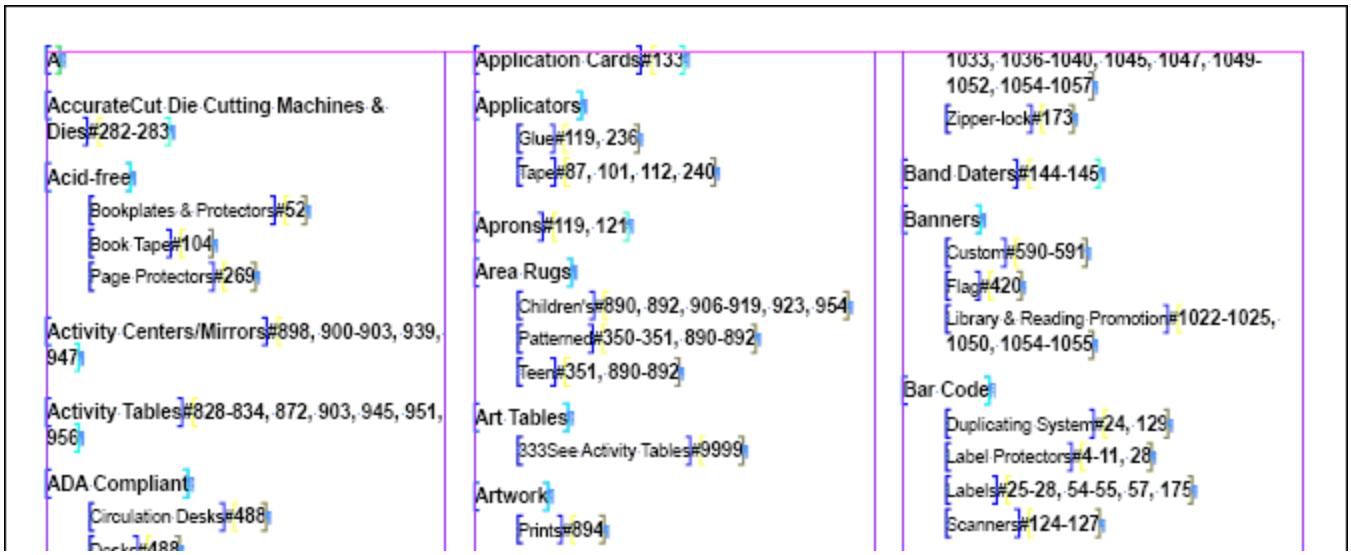
Mounting the Index XML

After mapping the index tags to the paragraph and character styles, the next step is to mount the index onto the page. The mounting is performed by a drag-and-drop method.

1. Select the AlphaIndex XML file in the InDesign **Structure** panel.
2. While holding down your left mouse button, drag the index onto the page in the desired location (typically the upper left corner of the page).



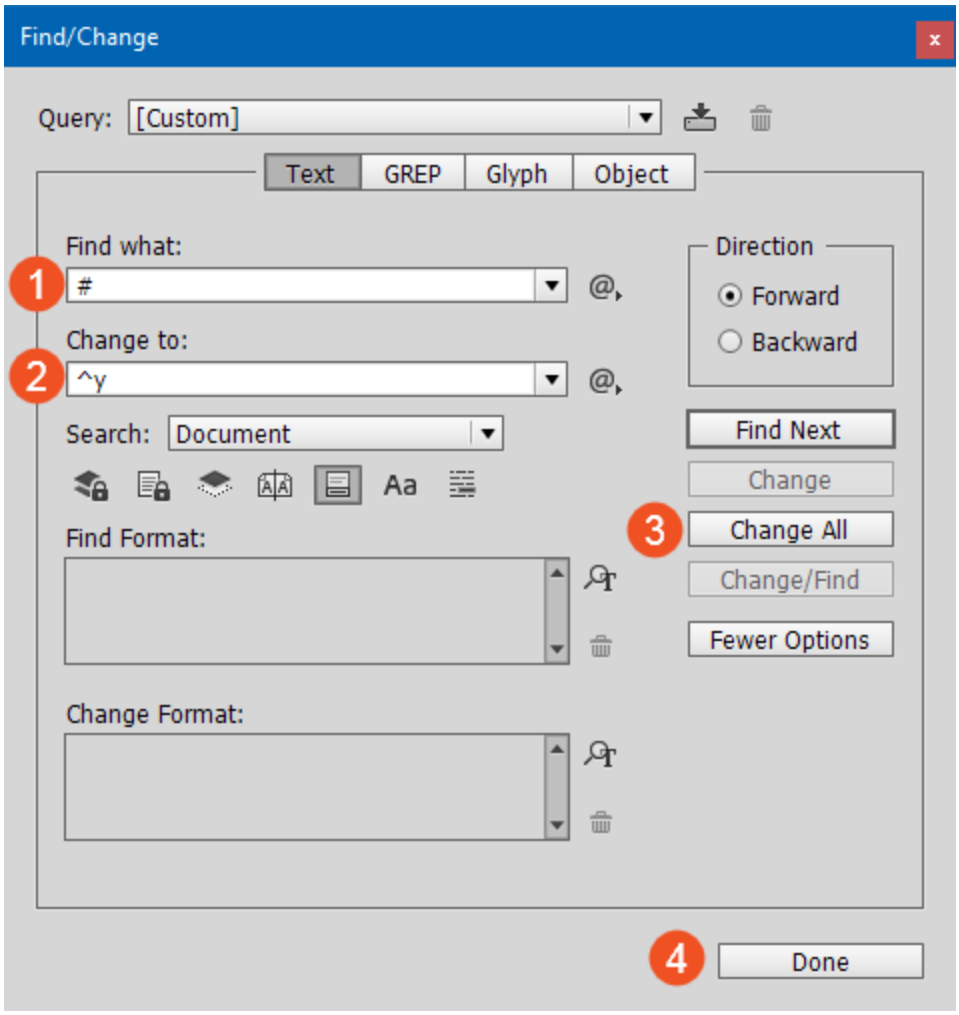
3. The index is now mounted with the relevant mapped styles applied to each level of the index. The next step is to generate the dot leaders by replacing the # characters with tab characters.



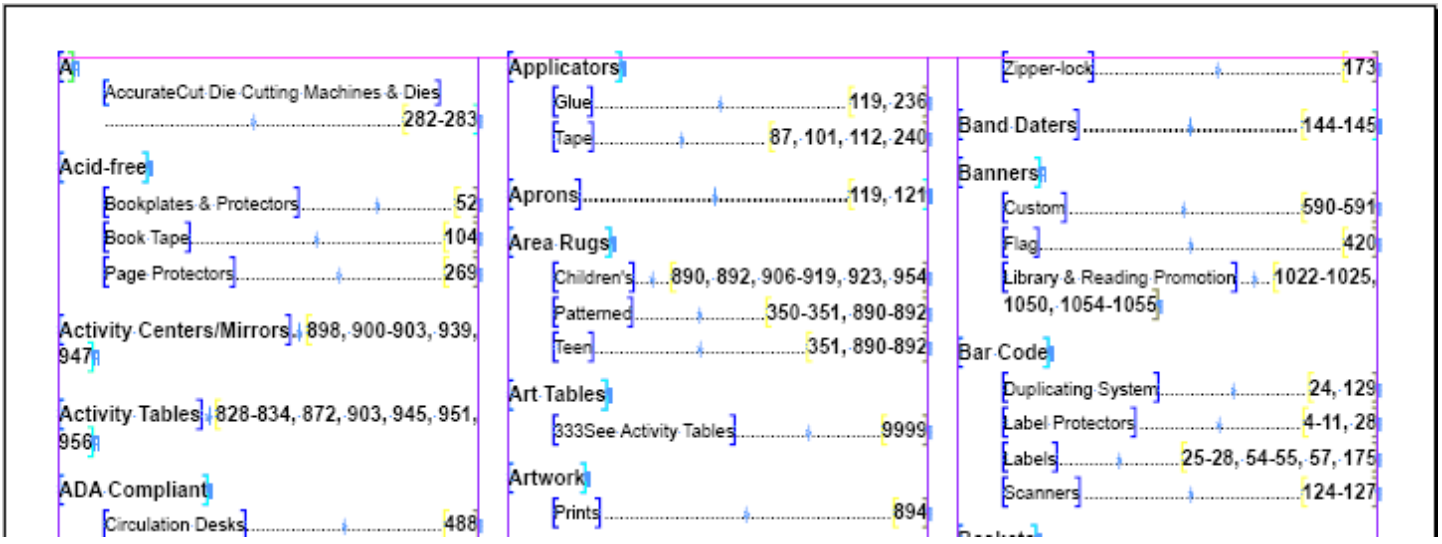
Replacing Special Characters With Dot Leaders on the InDesign Page

The final step in mounting the index is to complete the formatting by replacing the # symbols with a right-tab character in InDesign, which will insert the dot leaders.

1. With the mounted index open in InDesign, click on Ctrl+F or Edit > **Find/Change** to open the Find/Change menu.
2. Type **#** in the 'Find what' field and **^y** in the 'Change to' field. **^y** is the InDesign character for Right Indent Tab.
3. Click **Change All**, then click **Done**.



4. Your index should now resemble the following:



Additional Index Formatting Options

Additionally, you may format your index by any of the following methods:

- turn the index into an InDesign table by clicking **Convert Text to Table** in the **Table** menu
- format the index any way you want by using InDesign's native table formatting features

Exporting and Importing Publications

Publications may be exported from and imported into STEP in two formats: **Publication Excel** and **STEPXML**. Both formats supports all publication types: standard STEP Publisher ('drag and drop'), Flatplanner, and AutoPage. In addition, publications and their accompanying templates can be exported from one STEP system and imported into another through the use of publication **Transfer Packages**.

Using Publication Excel sheets, STEPXML files, and transfer packages to export and import publications can help reduce the time spent on manual publication-building tasks in the workbench, such as the manual creation of publication hierarchies as well as the linking of product, asset, and classification objects into publication sections. Publication transfer packages not only include this functionality, but they also remove the need to manually link templates into a new publication created from the import.

The ability to export and import publications also greatly simplifies the migration of publications from one STEP system to another, reducing the number of manual steps needed to duplicate and/or rebuild these publications.

The Publication Excel sections of this documentation explain the information included in the spreadsheet for standard ('drag and drop') publications. For information on the additional information included in the export of Flatplanner and AutoPage publications in the Publication Excel format, see these sections of the Flatplanner and AutoPage documentation:

- Exporting and Importing Flatplanner Publications in Excel
- Contents of Flatplanner Publication Excel Exports
- Exporting and Importing AutoPage Publications in Publication Excel

Exporting Publications in Excel

Publications can be exported and imported in an Excel format called **Publication Excel**. The Publication Excel format supports all publication types: standard STEP Publisher ('drag and drop'), Flatplanner, and AutoPage.

The typical first step in using a Publication Excel sheet to import a publication is to *export* a pre-existing publication. This exported Publication Excel file can then be used as a 'template' sheet to import new publications.

Note: The Publication Excel format is only available when exporting from the publication level. It is not available for exports from the publication group level or section level.

The following screenshots show a sample Publication Excel spreadsheet in two sections, displaying the columns that apply to standard publications. The Publication Excel format only allows one object per row.

	A	B	C	D	E	G	H	I	J
1	PublicationID	PublicationName	PublicationType	PublicationTemplateID	PublicationInheritedUnit	VersionID	VersionName	VersionContextID	VersionWorkspaceID
2	122996	Acme Clothing	Default publication type	109034					
3						204615	English US	Context1	Main
4						204616	English UK	Context7	Main
5									

	K	L	M	N	O	P	Q	R	S	U
1	LayerMappingTemplate	LayerMappingDocument	LayerMappingOwner	SectionLevel	SectionID	SectionName	SectionTypeID	MetaDataAttributeID	MetaDataAttributeValue	ProductTemplateID
2										
3										
4										
5										111315
6				1	208209	Shirts	Section			
7				1	209212	Pants	Section			
8				1	209216	Dresses	Section			

Information Included in the Export

The following table outlines the contents of a Publication Excel export for a standard publication.

Column Header	Description
PublicationID	STEP ID of exported publication
PublicationName	STEP Name of exported publication
PublicationType	Object type ID of exported publication
PublicationTemplateID	STEP ID of publication template linked to the exported publication

Column Header	Description
PublicationInheritedUnit	Unit applied to the publication group that contains the publication (mm, inches, points, or picas)
VersionID	STEP ID of the publication version(s) of the exported publication
VersionName	STEP Name of the publication version(s) of the exported publication
VersionContextID	STEP ID of the context(s) used in the publication version(s) of the exported publication
VersionWorkspaceID	STEP ID of the workspace(s) used in the publication version(s) of the exported publication
LayerMappingTemplate	Name of the layers in the product template. Not commonly used for standard 'drag and drop' publications.
LayerMappingDocument	Name of the corresponding layer in the publication document, which is either the publication template or the mounting page. Not commonly used for standard 'drag and drop' publications.
LayerMappingOwner	Displays whether the publication version to which the layer is mapped is the owner of the layer. Not commonly used for standard 'drag and drop' publications.
SectionLevel	A number that represents whether the section is a top-level section (1) or a subsection (2, 3, 4, etc.)
SectionID	STEP ID of the exported publication section(s)
SectionName	STEP Name of the exported publication section(s)
SectionTypeID	Object type ID of the exported publication section(s)
MetaDataAttributeID	STEP ID of metadata (description) attributes linked to the publication or section (column will not appear in the export if there are no values populated for the metadata attributes)
MetaDataAttributeValue	Value of metadata (description) attributes linked to the publication or section (column will not appear in the export if there are no values populated for the metadata attributes)

Column Header	Description
ProductTemplateID	STEP ID of the product template(s) linked to the exported publication

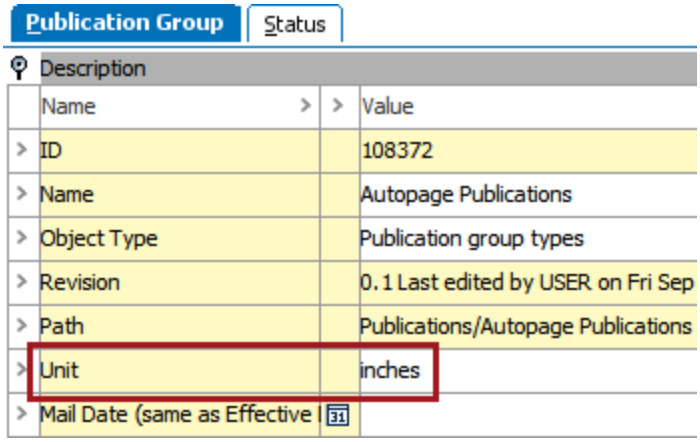
Location of Publication Export Information in STEP

The following sections use a sample publication to illustrate where the information included in a Publication Excel export resides in the STEP Workbench.

The information in this topic is also applicable for STEPXML exports, but the 'tags' listed in this topic are the column headers that appear in Publication Excel files. For more information on STEPXML exports of publications, see the **Exporting and Importing Publications in STEPXML** topic.

Publication Group Tab (Parent Publication Group)

The **PublicationInheritedUnit** field contains the unit used in the publication. The unit for a publication is set on the publication group parent object that contains the publication. This unit inherits to all publications contained within the publication group.



Publication Tab

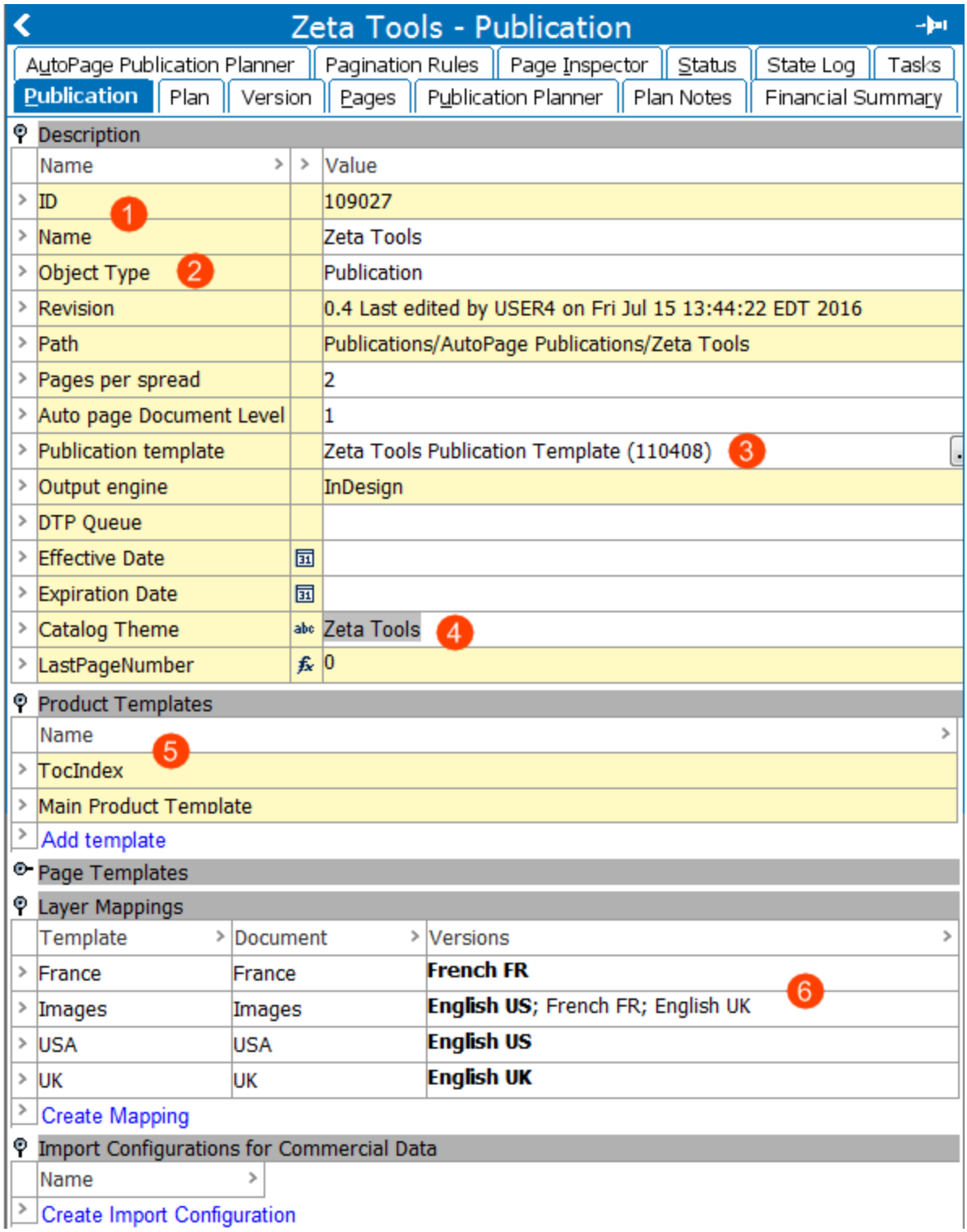
In this example, the sample publication contains eight top-level sections, two linked product templates, one metadata (description) attribute that contains a value, and four mapped layers.

1. The **PublicationID** and **PublicationName** columns contains the STEP ID and STEP Name of the publication, respectively.
2. The **PublicationType** column contains the object type ID of the publication.
3. The **PublicationTemplateID** column contains the STEP ID of the publication template.
4. The **MetaDataAttributeID** and **MetaDataAttributeValue** columns contain the STEP ID(s) and STEP Names(s) of populated metadata attributes that appear on the publication and section(s). (If a publication /

section has linked metadata attributes but these attributes do not contain values, the **MetaDataAttributeID** and **MetaDataAttributeValue** columns will not appear on the exported sheet.)

5. The **ProductTemplateID** column contains the STEP ID(s) of the product template(s).
6. The **LayerMappingTemplate** column contains the name of the layer in the templates (Publication and/or Product); **LayerMappingDocument** will contain the name of the corresponding layer in the Publication Document (mounting page); and **LayerMappingOwner** will display whether the publication version to which the layer is mapped is the owner of the layer—value of 'true' or 'false.' In the following screenshot, 'English US' (displayed in bold) is the owner of the 'Images' layer.

Note: When exporting a 'model' publication in order to use the resulting Publication Excel sheet as a template for later publication imports, it is recommended to populate at least one metadata attribute on the publication (and each section) with a 'dummy' value. This ensures that the **MetaDataAttributeID** and **MetaDataAttributeValue** columns appear on the 'template' sheet and will not have to be manually inserted later.



Sections, Subsections, Linked Products, and Assets

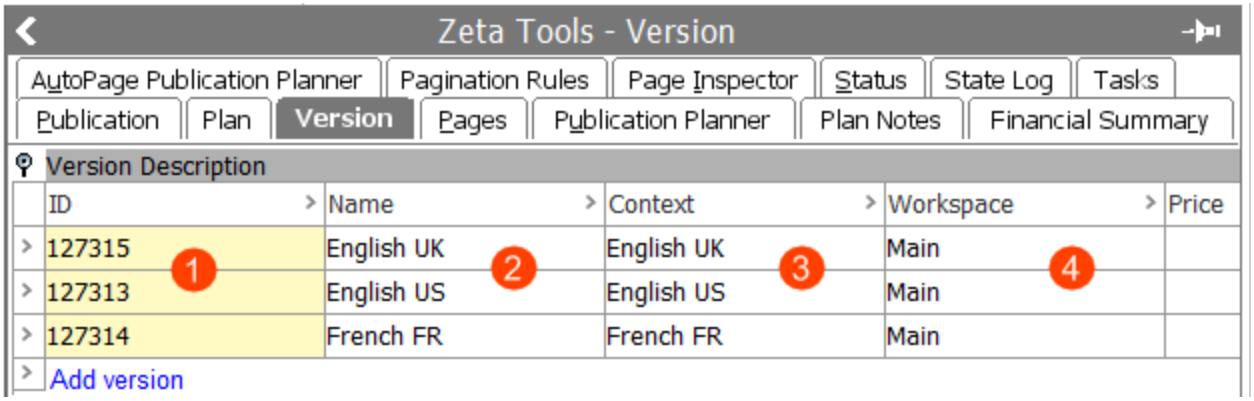
The sample AutoPage publication also contains subsections (sections within sections), product objects, and asset objects linked to the publication sections.

- The **SectionLevel** column contains a number that represents whether the section is a top-level section (1) or a subsection (2, 3, 4, etc.).
- The **SectionID** and **SectionName** columns contain the STEP IDs and STEP Names of all sections and subsections.

Version Tab

All information related to the publication version(s) is included in the export.

1. The **VersionID** column contains the STEP ID(s) of the publication version(s).
2. The **VersionName** column contains the STEP Name(s) of the publication version(s).
3. The **VersionContextID** column contains the STEP ID(s) of the context(s) to which each publication version is linked.
4. The **VersionWorkspaceID** column contains the STEP ID of the workspace to which each publication version is linked (will either be 'Main' or 'Approved').



Exporting a Publication Excel Sheet

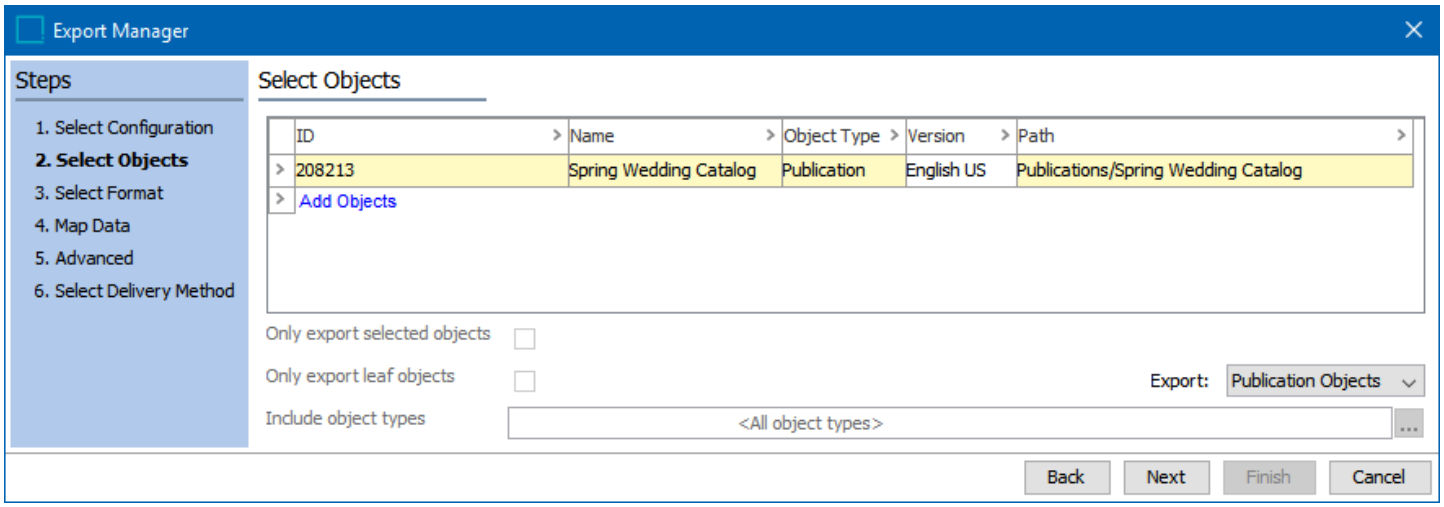
The following steps explain how to export a Publication Excel sheet from a publication object in STEP.

1. Right-click on a publication object and select **Export Data Below**, or go to File > Export > Data.

   If you export directly from the publication object, the publication will already be selected in Step 2 of the Export Manager (Select Objects), and **Publication Objects** will already be populated in the Export dropdown list. To export more than one publication, click 'Add Objects' and add more publications.

2. Nothing else needs to be done on the Select Objects screen, as all other options are disabled when **Publication Objects** is selected for export. Click **Next**.

   Note: Though the option exists on this screen to choose a publication Version, there is no need to do so since the sheet contains information that applies to all versions in the publication.



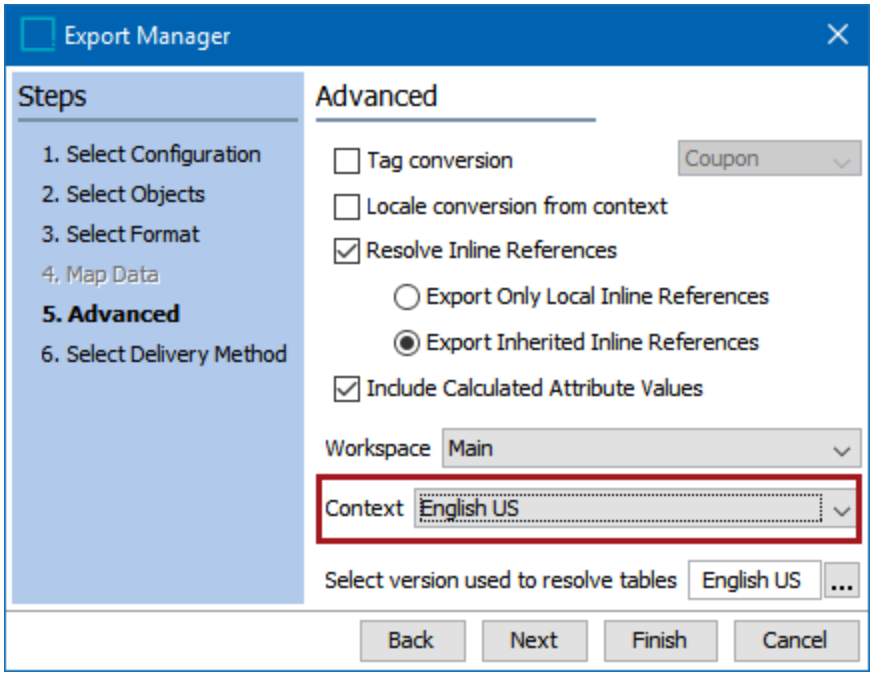
3. On the Select Format screen, choose **Publication Excel** from the dropdown list. then click **Next**.

   Note: The **Include Unique Keys as IDs** is relevant for standard 'drag and drop' publications if the following conditions apply: 1) Objects have been linked to the publication sections to organize them for mounting, and 2) Unique keys have been used instead of STEP IDs to identify them. However, since it is more common practice to link objects to sections in AutoPage publications, the instructions on how to work with the unique key option are provided in the **Exporting and importing AutoPage Publications in Excel** section of the **AutoPage** documentation.

4. Since data does not need to be mapped for the Publication Excel format, the Map Data screen will be skipped.

5. On the Advanced screen, choose a **Context** if you have dimension-dependent data section names, page names, or metadata attribute values that you would like to see in a particular language. All other settings may be ignored. Click **Next**.

> **Note:** If metadata attributes attached to publication or section objects are populated using Inline References, unchecking 'Resolve Inline References' will not cause the values to export as unresolved.



6. Choose **File** as the Delivery Method in Step 6, then click **Finish**.
7. On the **Save Export Configuration** screen, check 'Save Options' if you would like to save the Export configuration.
8. Click **OK**, then retrieve the Excel file.

Considerations and Limitations

- Though multiple publications may be exported in a single Publication Excel file, multiple publications may not be *imported* in the Publication Excel format. To import multiple publications at once, the STEPXML format must be used. For information on importing publications in STEPXML, see the **Exporting and Importing Publications in STEPXML** topic.
- Support for Publication Excel export is not available in the Web UI.

Importing Publications in Excel

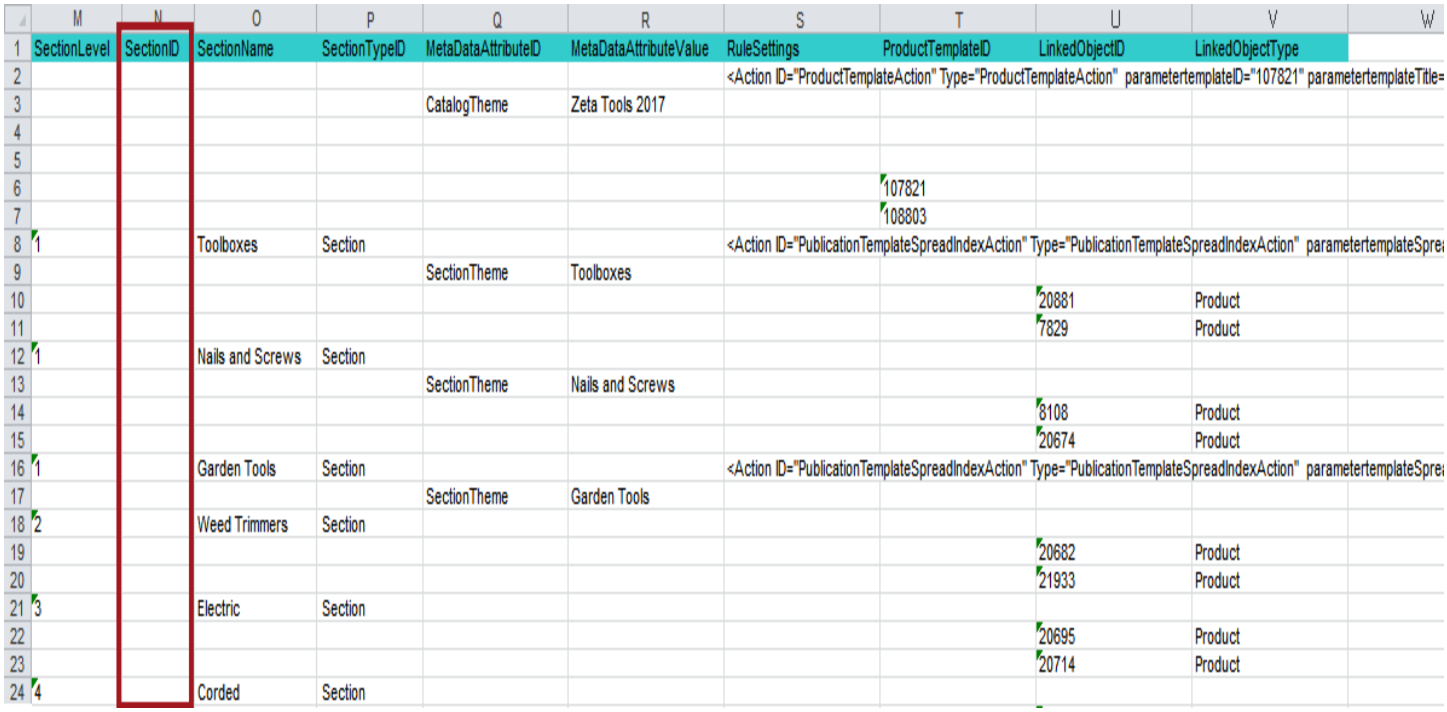
Publications can be imported in an Excel format called **Publication Excel**. All objects required for a publication in the green Publication hierarchy can be created with a Publication Excel import, with the exception of publication group objects. The Publication Excel format supports all publication types: standard STEP Publisher ('drag and drop'), Flatplanner, and AutoPage.

The typical first step in importing a publication in the Publication Excel format is to *export* a pre-existing publication. This exported Publication Excel file can then be used as a 'template' sheet for new publications, i.e., existing information on the export sheet will be replaced with new information for the subsequent import. For more information on the Publication Excel export process, see **Exporting Publications in Excel**.

The following screenshots show a sample Publication Excel spreadsheet that could be used to create a two-version publication with multiple sections and subsections. In addition, this sheet is populated with data that will link product and asset objects to the sections, populate metadata attributes that exist on the publication and sections, and create pagination rules for the publication and sections. Note that the ID fields have been left blank for PublicationID, VersionID, and SectionID, as the intention is for the system to autogenerate these IDs upon import.

Note: It is strongly recommended that the STEP ID is set to autogenerate (by use of an ID Pattern) for the 'Publication Version' Basic Object Type and all object types used to create publications and sections (typically 'Default publication type' and 'Section'). If not, you must provide these IDs in the Publication Excel import sheet. If a Publication ID on the import sheet matches the ID of an existing publication in STEP, the import will update the existing publication. For information on autogenerating STEP IDs, see **Autogenerate Using Name Pattern and ID Pattern** in the **System Setup / Super User** documentation.

	A	B	C	D	E	F	G	H	I	J	K	L
1	PublicationID	PublicationName	PublicationType	PublicationTemplateID	PublicationInheritedUnit	VersionID	VersionName	VersionContextID	VersionWorkspaceID	LayerMappingTemplate	LayerMappingDocument	LayerMappingOwner
2		Zeta Tools	Default publication type	110408	inches							
3												
4							French FR	Context2	Main			
5										France	France	true
6										Images	Images	false
7							English US	Context1	Main			
8										USA	USA	true
9										Images	Images	true
10							English UK	Context7	Main			
11										UK	UK	true
12										Images	Images	false



	M	N	O	P	Q	R	S	T	U	V	W
1	SectionLevel	SectionID	SectionName	SectionTypeID	MetaDataAttributeID	MetaDataAttributeValue	RuleSettings	ProductTemplateID	LinkedObjectID	LinkedObjectType	
2							<Action ID="ProductTemplateAction" Type="ProductTemplateAction" parametertemplateID="107821" parametertemplateTitle=				
3					CatalogTheme	Zeta Tools 2017					
4											
5											
6								107821			
7								108803			
8	1		Toolboxes	Section			<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parametertemplateSprea				
9					SectionTheme	Toolboxes					
10									20881	Product	
11									7829	Product	
12	1		Nails and Screws	Section							
13					SectionTheme	Nails and Screws					
14									8108	Product	
15									20674	Product	
16	1		Garden Tools	Section			<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parametertemplateSprea				
17					SectionTheme	Garden Tools					
18	2		Weed Trimmers	Section							
19									20682	Product	
20									21933	Product	
21	3		Electric	Section							
22									20695	Product	
23									20714	Product	
24	4		Corded	Section							

Mandatory and Optional Information for Publication Excel Imports

The following table outlines the contents of a **Publication Excel** import spreadsheet and whether the fields are mandatory or optional. The columns are ordered from top to bottom as they would appear left to right when exported from STEP. Columns can be reordered or removed before import as long as there is only one object per row. Columns may be reordered or removed if, for example, you find that a certain order is more intuitive or if you would like to work with a more compact spreadsheet that contains only the columns that you need.

Though a publication template and product template(s) are required to manually create a publication in STEP, this is not the case for Publication Excel imports. The fields for PublicationTemplateID and ProductTemplateID are listed as optional in the following table because templates can be linked to publication(s) in STEP *after* the publication is created. In addition, a Publication Excel import can create sections without a designated version, hence the optional designation for VersionID. This functionality is useful if you would like to quickly create the structure of a publication before deciding which templates or versions you will need. The bare minimum amount of information that is required to create a publication with a Publication Excel import is the object type ID of the publication and the object type ID(s) of the section objects.

Note: Even though the system will allow a Publication Excel import to create a publication without a version, it is not recommended to do so. A version must still be created before the publication can actually be used for production, as actual pages cannot be built in InDesign without a version.

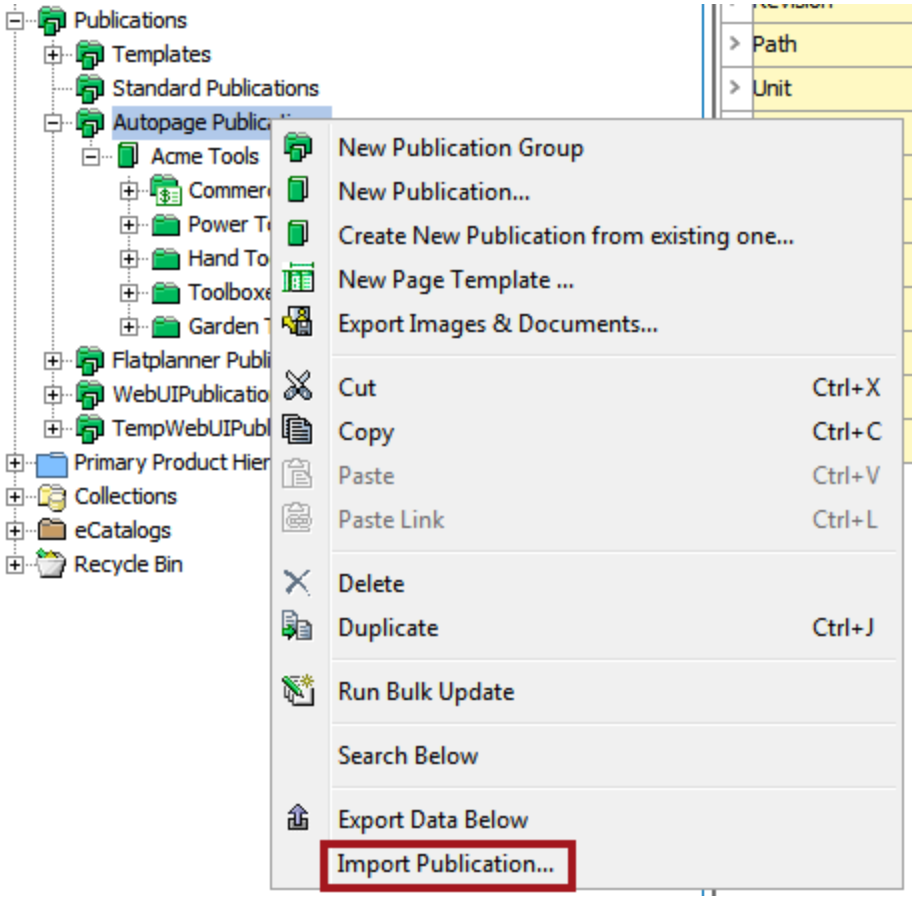
Column Header	Description	Mandatory?
PublicationID	STEP ID of imported publication	No (**Yes** if the STEP ID of the publication object type is not set to autogenerate)
PublicationName	STEP Name of imported publication	No
PublicationType	Object type ID of imported publication	**Yes**
PublicationTemplateID	STEP ID of publication template linked to the imported publication	No, but it is *strongly* recommended to provide this information. If not provided in the import, a publication template must be manually linked to the publication before it can be used for production.
PublicationInheritedUnit	Unit applied to the publication group that contains the publication (mm, inches, points, or picas)	No, but it is strongly recommended to provide this information. If not provided in the import, the unit will default to mm, regardless of what unit is set on the existing publication group.
VersionID	STEP ID of the publication version (s) of the imported publication	No (**Yes** if the STEP ID of the publication version object type is not set to autogenerate)
VersionName	STEP Name of the publication version(s) of the imported publication	No
VersionContextID	STEP ID of the Context(s) used in the publication version(s) of the imported publication	No, but it is strongly recommended to provide this information. If not provided in the import, the version context ID must be manually added to the publication before it can be used for

Column Header	Description	Mandatory?
		production.
VersionWorkspaceID	STEP ID of the workspace(s) used in the publication version(s) of the imported publication	No, but it is strongly recommended to provide this information. If not provided in the import, the version workspace ID must be manually added to the publication before it can be used for production.
LayerMappingTemplate	Name of the document layers in the templates (Publication, Product, and InDesign-created Page templates)	No
LayerMappingDocument	Name of the corresponding document layers in the Publication Document (mounting page)	No
LayerMappingOwner	Whether the publication version to which the layer is mapped is the owner of the layer ('true' for yes, 'false' for no)	No
SectionLevel	A number that represents whether the section is a top-level section (1) or a subsection (2, 3, 4, etc.)	No (**Yes** if you do not want all sections to import as top-level sections)
SectionID	STEP ID of the imported publication section(s)	No (**Yes** if the STEP ID of the section object type is not set to autogenerate)
SectionName	STEP Name of the imported publication section(s)	No
SectionTypeID	Object type ID of the imported publication section(s)	**Yes**
MetaDataAttributeID	STEP ID of metadata (description)	No

Column Header	Description	Mandatory?
	attributes linked to the publication or section	
MetaDataAttributeValue	Value of metadata (description) attributes linked to the publication or section	No
ProductTemplateID	STEP ID of the product template(s) linked to the imported publication	No, but it is strongly recommended to provide this information. If not provided in the import, a product template must be manually linked to the publication before it can be used for production.

Importing a Publication Excel Sheet

1. Right-click on the publication group object in which you would like to create your publication, then select **Import Publication**.



2. In the **Select Excel file** dialog that displays, navigate to the desired Publication Excel file, then click **Open**.
3. In the **Save Import Configuration** dialog that displays, select **Start Import Process**, then click **OK**. The file will import with no additional prompts, as columns do not need to be mapped for Publication Excel imports. STEP automatically recognizes the file format, which is pre-mapped.

Importing a Publication Excel Sheet – Alternate Methods

Alternately, you may import a Publication Excel sheet by the following methods:

- Import Manager (File > Import > Data)
- Hotfolders (IIEP)
- Publishing Web UI (Import Publication XLS Action)

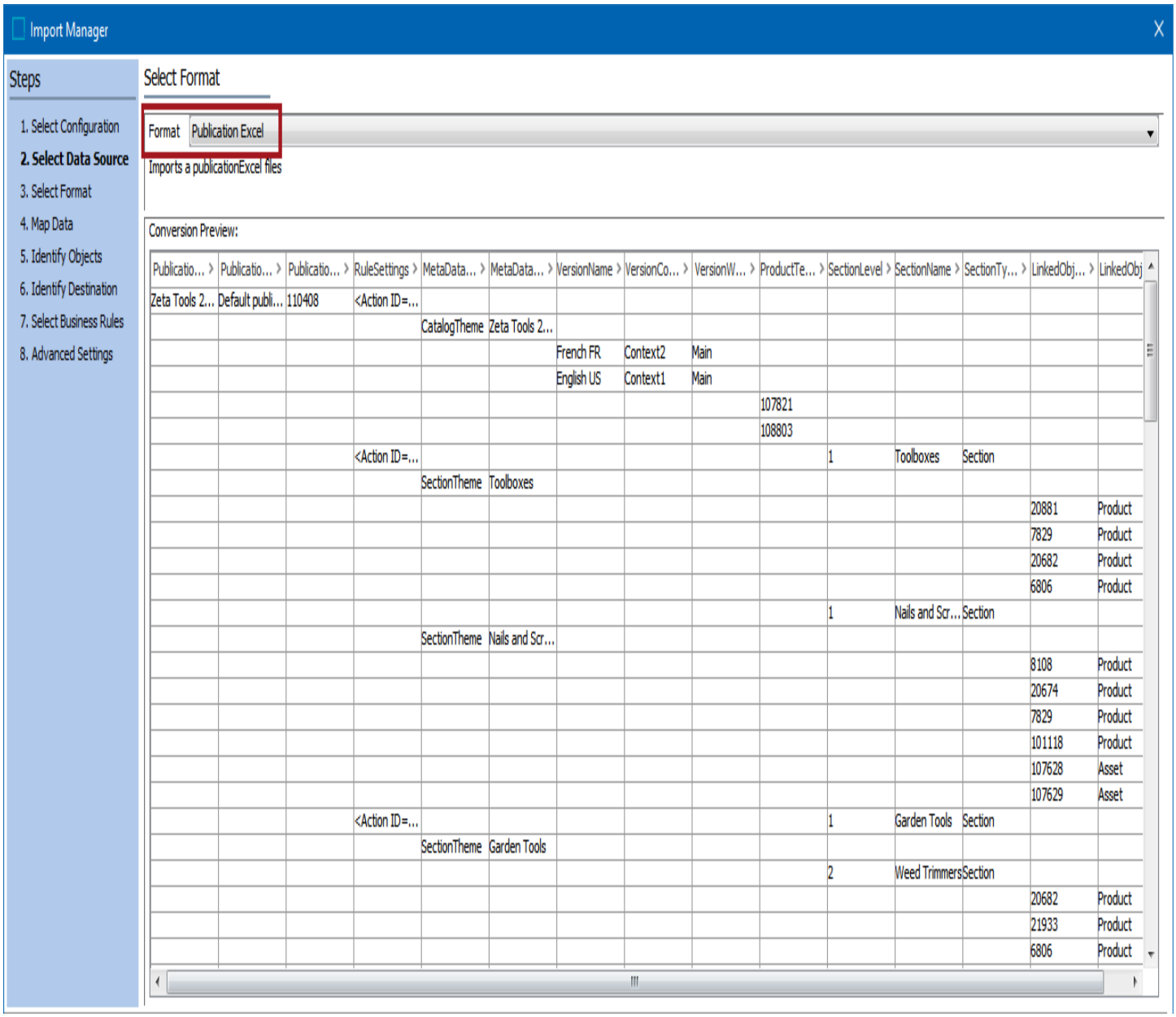
Importing Publication Excel Files in the Import Manager (File > Import > Data)

The File > Import > Data method launches the **Import Manager** wizard, which involves more screens to click through but provides more control over what happens when the Publication Excel file is imported. Some standard options in the Import Manager wizard are available for the Publication Excel import format just as they are for other formats, including the ability to perform a test-only import and run business rules on import.

Note: The imported publication will be created beneath the top (root) node of the Publication hierarchy if this option is chosen.

The following steps presume that a new import configuration is being created.

1. In **Step 1** (Select Configuration), choose Create New Import. Click Next.
2. In **Step 2** (Select Data Source), choose the Publication Excel file that you would like to import. Click Next.
3. In **Step 3** (Select Format), the Publication Excel format will already be selected and the Import Manager will display a preview of the file. This visual representation of the file may prove useful as a 'final check' on the import sheet's contents before proceeding with the import. Click Next. Steps 4 and 5 will be skipped.



4. In **Step 6** (Identify Destination), all settings may be ignored, as none of them apply to publication objects. However, you may check **Test Only Import** if you would like to run the import as test only. Click Next.
5. In **Step 7** (Select Business Rules), business conditions and/or actions may be selected if workflows have been configured for publication and/or section objects. Click **Next**.
6. In **Step 8** (Advanced Settings), all settings may be ignored. Click **Finish**.
7. Check **Save Options** on the Save Import Configuration screen if you would like to save the Publication Excel import configuration. Click **OK** to complete.

Importing Publication Excel Files Via Hotfolders

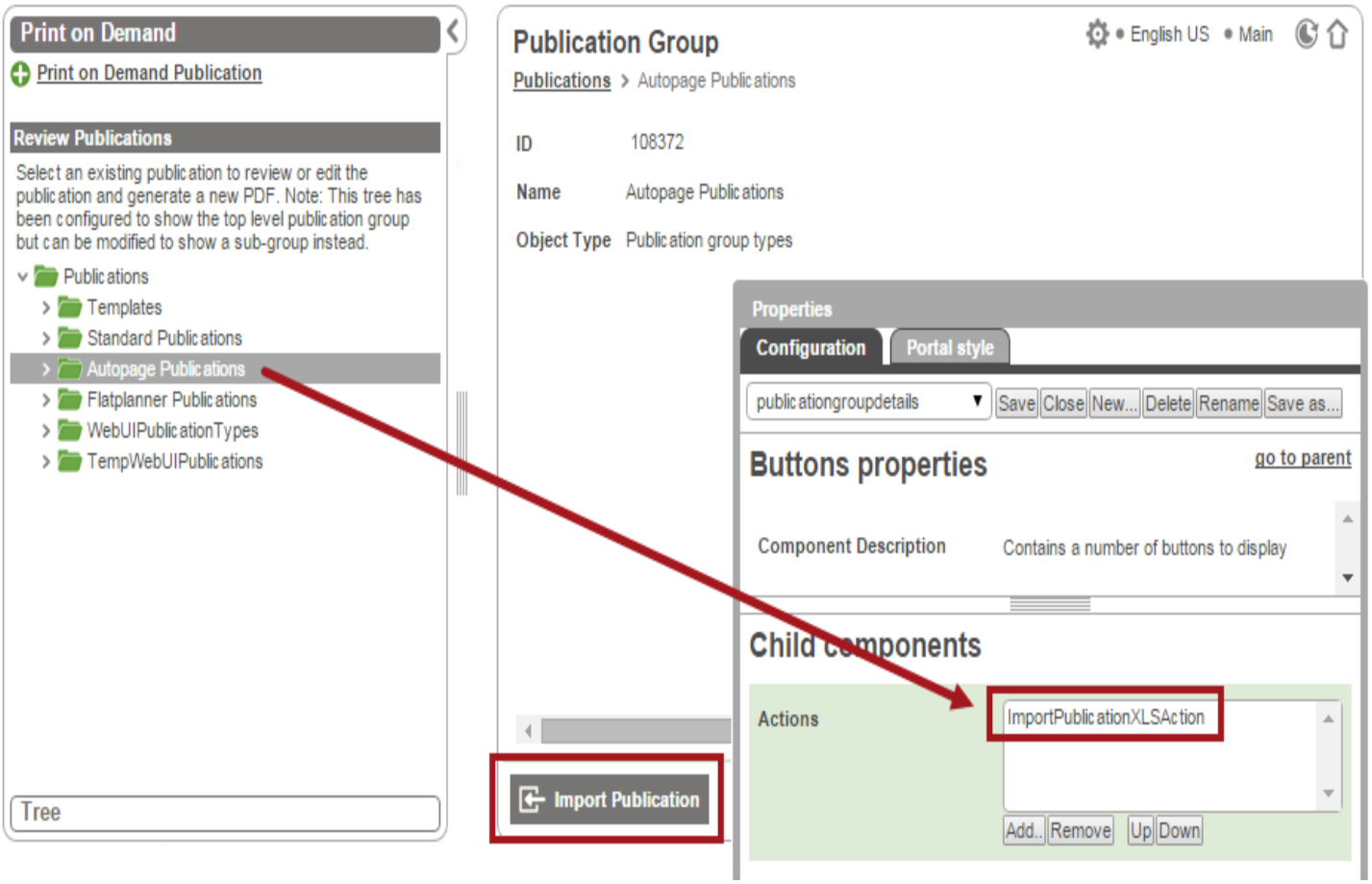
Publication Excel files may also be uploaded via hotfolders, which are configured through Inbound Integration Endpoints (IIEPs). Configuring an IIEP for Publication Excel imports is similar to configuring a Publication Excel import using the standard Import Manager.

Note: The imported publication will be created beneath the top (root) node of the Publication hierarchy if this option is chosen.

For more information on configuring hotfolders and IIEPs, see **Creating an Inbound Integration Endpoint** in the **Data Exchange** documentation.

Importing Publication Excel Files in Web UI

In the Web UI, Publication Excel import functionality is available through the **Import Publication XLS Action**, which can be added as a button on a Node Details component. It is intended to be used from a publication group details screen, as publications must be imported into a publication group folder.



For information on the Publishing Web UI, See **Publishing Web UI** in the **Web User Interfaces** documentation.

Considerations and Limitations

- Though multiple publications may be exported in a single Publication Excel file, multiple publications may not be *imported* in the Publication Excel format. To import multiple publications at once, the STEPXML format must be used. For more information, see the **Exporting and Importing Publications in STEPXML** topic.

Linking Objects to the Publication Hierarchy by Excel Import

Product, classification, and asset objects may be linked to publication sections in the Publication (green) hierarchy by using a **Publication Excel** import sheet.

Though the Publication Excel format can be used to create entire publications on import, it can also be used to link objects into the sections of *existing* publications.

Note: The Publication Excel format will only link objects to publication *sections*. If you need to link objects to a *publication*, this linking must be performed manually. See the **Linking and Unlinking Publication Products, Assets, and Classifications** section of the **Getting Started / User Guide**.

To obtain the 'template' spreadsheet that you will use for your import, you should first *export* the publication into which you would like to link your objects. To export the publication, follow the steps outlined in the **Exporting a Publication Excel Sheet** section of the **STEP Publisher** documentation.

Once you have the Publication Excel sheet, follow these steps to link objects to the sections within your publication. The first two steps are optional, as columns do not actually need to be removed for the sheet to function correctly. However, removing extraneous columns makes the sheet easier to manage.

1. Delete all columns between **PublicationID** and **SectionLevel** (in this example, columns B through J).

	A	B	C	D	E	F	G	H	I	J	K
1	PublicationID	PublicationName	PublicationType	PublicationTemplateID	PublicationInheritedUnit	PubPageTemplateID	VersionID	VersionName	VersionContextID	VersionWorkspaceID	SectionLevel
2	177994	Acme Tools	Default publication type	110408							
3											
4							177996	French FR	Context2	Main	
5							177997	English US	Context1	Main	

2. Delete all columns after **SectionTypeID** (in this example, F through H).

	A	B	C	D	E	F	G	H
1	PublicationID	SectionLevel	SectionID	SectionName	SectionTypeID	MetaDataAttributeID	MetaDataAttributeValue	RuleSettings
2	177994							<Action ID="Repe
3						CatalogTheme	Acme Tools	

3. Add two columns at the end with these headers: **LinkedObjectID** and **LinkedObjectType**.

	A	B	C	D	E	F	G
1	PublicationID	SectionLevel	SectionID	SectionName	SectionTypeID	LinkedObjectID	LinkedObjectType
2	177994						
3		1	177998	Toolboxes	Section		
4							
5		1	177999	Nails and Screws	Section		
6							
7		1	178000	Garden Tools	Section		
8							
9		2	178001	Weed Trimmers	Section		
10		3	178002	Gas Powered	Section		
11		4	178003	Gas-Oil Mix	Section		
12		4	178004	Regular	Section		
13		1	178005	Gloves	Section		

4. Insert blank rows beneath each **Section** into which you would like to link products, assets, and/or classifications. Then, enter the STEP IDs of the linked objects in the **LinkedObjectID** column, starting with the row directly beneath the appropriate Section row.

	A	B	C	D	E	F	G
1	PublicationID	SectionLevel	SectionID	SectionName	SectionTypeID	LinkedObjectID	LinkedObjectType
2	177994						
3		1	177998	Toolboxes	Section		
4						18210	
5						18212	
6						18213	
7						18216	
8						100812	
9						168527	
10						100703	
11						100305	
12						18207	
13						18214	
14						18215	
15						18217	
16						20803	
17							
18		1	177999	Nails and Screws	Section		
19							
20		1	178000	Garden Tools	Section		

A list of STEP IDs of products, assets, and/or classifications may be obtained by exporting the relevant objects—in Excel format—from their respective hierarchies in STEP or from a Collection. These IDs can then be pasted into the **LinkedObjectID** column of the Publication Excel sheet where needed. See the **Excel Format** section of the **Data Exchange** documentation for more information.

5. If you use unique keys instead of STEP IDs as identifiers for the objects that you are linking, you will need to also include a column called **LinkedObjectKeyID** and populate it with the ID of the relevant unique key. In the **LinkedObjectID** column, the value of the unique key should appear instead of the STEP ID. See the **Unique Keys** topic in the **System Setup** / **Super User Guide** documentation for more information on setting up and using unique keys.

LinkedObjectKeyID	LinkedObjectID	LinkedObjectType
SupplierPartNumber	22487-123	Product
SupplierPartNumber	22487-12	Product
SupplierPartNumber	20444	Product
SupplierPartNumber	107628	Asset
SupplierPartNumber	107629	Asset

6. In the **LinkedObjectType** column, enter 'Product', 'Asset', or 'Classification', depending on what type of object is being linked.

> **Note:** The generic terms 'Product', 'Asset', and 'Classification' are required; the actual object types of the linked items should not be specified.

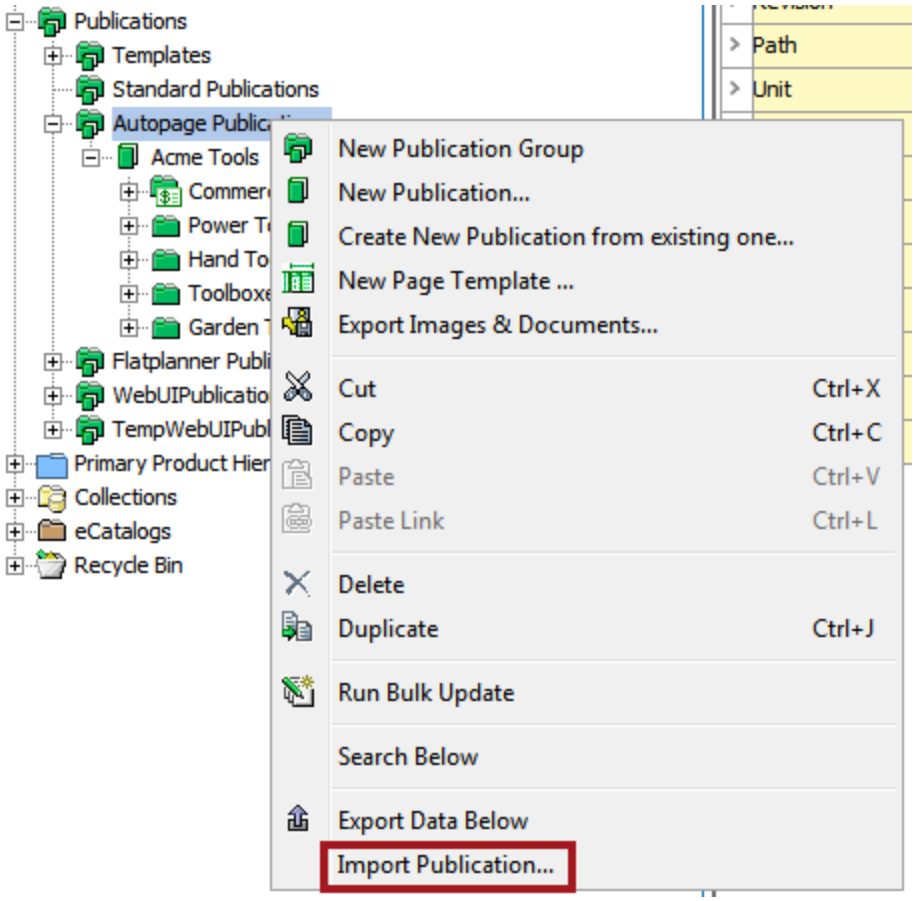
	A	B	C	D	E	F	G
1	PublicationID	SectionLevel	SectionID	SectionName	SectionTypeID	LinkedObjectID	LinkedObjectType
2	177994						
3		1	177998	Toolboxes	Section		
4						18210	Product
5						18212	Product
6						18213	Product
7						18216	Product
8						100812	Product
9						168527	Product
10						100703	Product
11						100305	Product
12						18207	Product
13						18214	Product
14						18215	Product
15						18217	Asset
16						20803	Classification
17							

7. Repeat the above steps for each additional section into which you would like to link objects.

Importing the Sheet

Once all STEP IDs and object type designations have been added to the sheet, import it into your publication by following these steps:

1. Right-click on the publication group that contains your publication and select **Import Publication...**.



2. In the **Select Excel file** dialog that displays, navigate to the desired Publication Excel file, then click **Open**.
3. In the **Save Import Configuration** dialog that displays, select **Start Import Process**, then click **OK**. The file will import with no additional prompts, as columns do not need to be mapped for Publication Excel imports. STEP automatically recognizes the file format, which is pre-mapped.
4. When the background process successfully completes, the product, asset, and/or classification objects will be linked into the publication sections.

For more information on other ways to import a Publication Excel sheet (for example, by using the Import Manager or in Web UI), see the **Importing a Publication Excel Sheet** topic.

Exporting and Importing Publications in STEPXML

Publications and publication hierarchies can be exported and imported using the STEPXML file format. STEPXML supports publications created with any STEP publisher component: STEP Publisher (standard 'drag and drop'), Flatplanner, and AutoPage. The STEPXML format is available when exporting from any node in the publication hierarchy—publication group, publication, or section.

This topic explains the manual process for exporting publications in STEPXML using the **Export Manager** in the STEP Workbench, the outbound parameters available for publications, a sample XML file, and a description of the tags inside the resulting STEPXML file.

The STEPXML format can also be used to import and export publications using inbound integration endpoints (IIEP) and outbound integration endpoints (OIEP), respectively.

Importing a Publication in STEPXML

Publications and publication structures can be created by importing a STEPXML file. This same file can also be used to link the relevant publication template and product templates to the publication, populate metadata attributes on the publication objects, and more. An example of a STEPXML file that can be used to import a publication is provided later in this topic in the 'File Example' section. Multiple publications can be imported at once using STEPXML, which is an advantage that the STEPXML format has over the Publication Excel format.

Instructions on how to import the STEPXML file itself are not detailed in this topic since the steps are the same as those for importing any other type of data into STEP using STEPXML. Publications can be imported manually using the Import Manager or automatically using an inbound integration endpoint (IIEP).

For more information, see the **Import Manager** and **Inbound Integration Endpoints** sections of the **Data Exchange** documentation.

Exporting a Publication in STEPXML

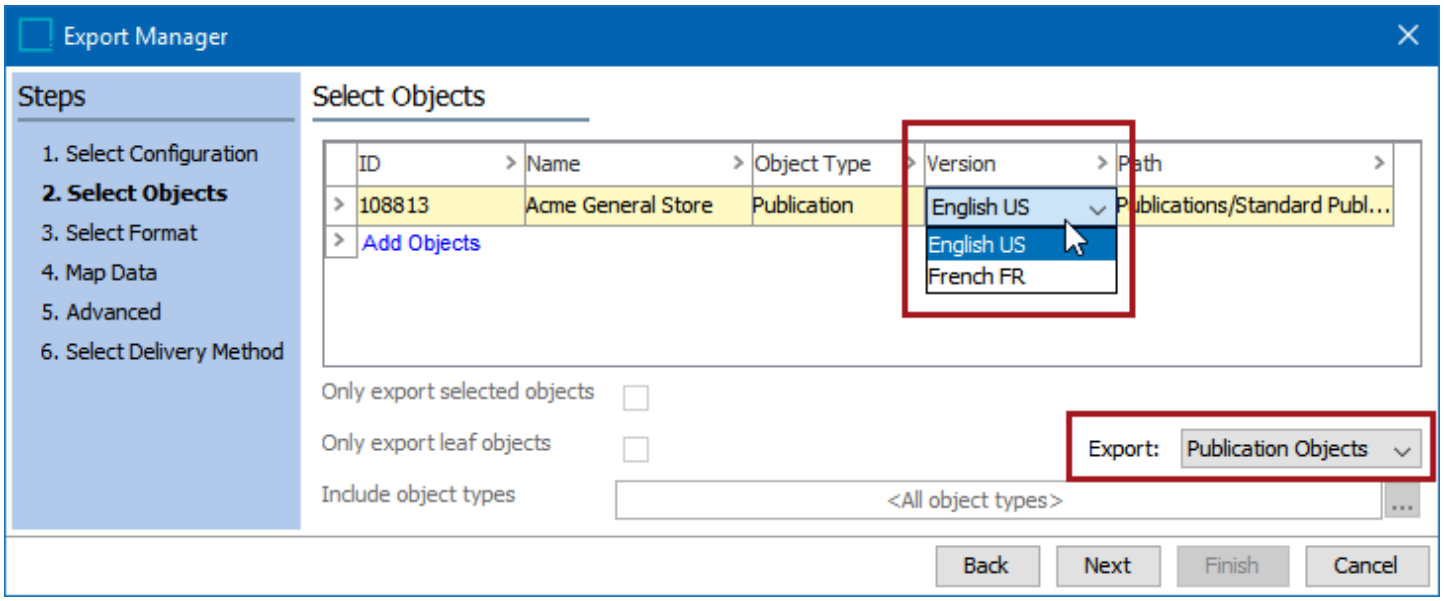
Instructions on how to export a publication in STEPXML using an OIEP are not detailed in this topic since a publication STEPXML file is used in an OIEP just like any other STEPXML file. For more information, see the **Outbound Integration Endpoints** section of the **Data Exchange** documentation.

The overall steps to export a publication in the STEPXML format using the Export Manager are the same as those used in exporting any other type of data from STEP. The following steps describe the additional publication-specific options that must be chosen, such as the outbound parameters that are chosen in the Select Format step of the wizard.

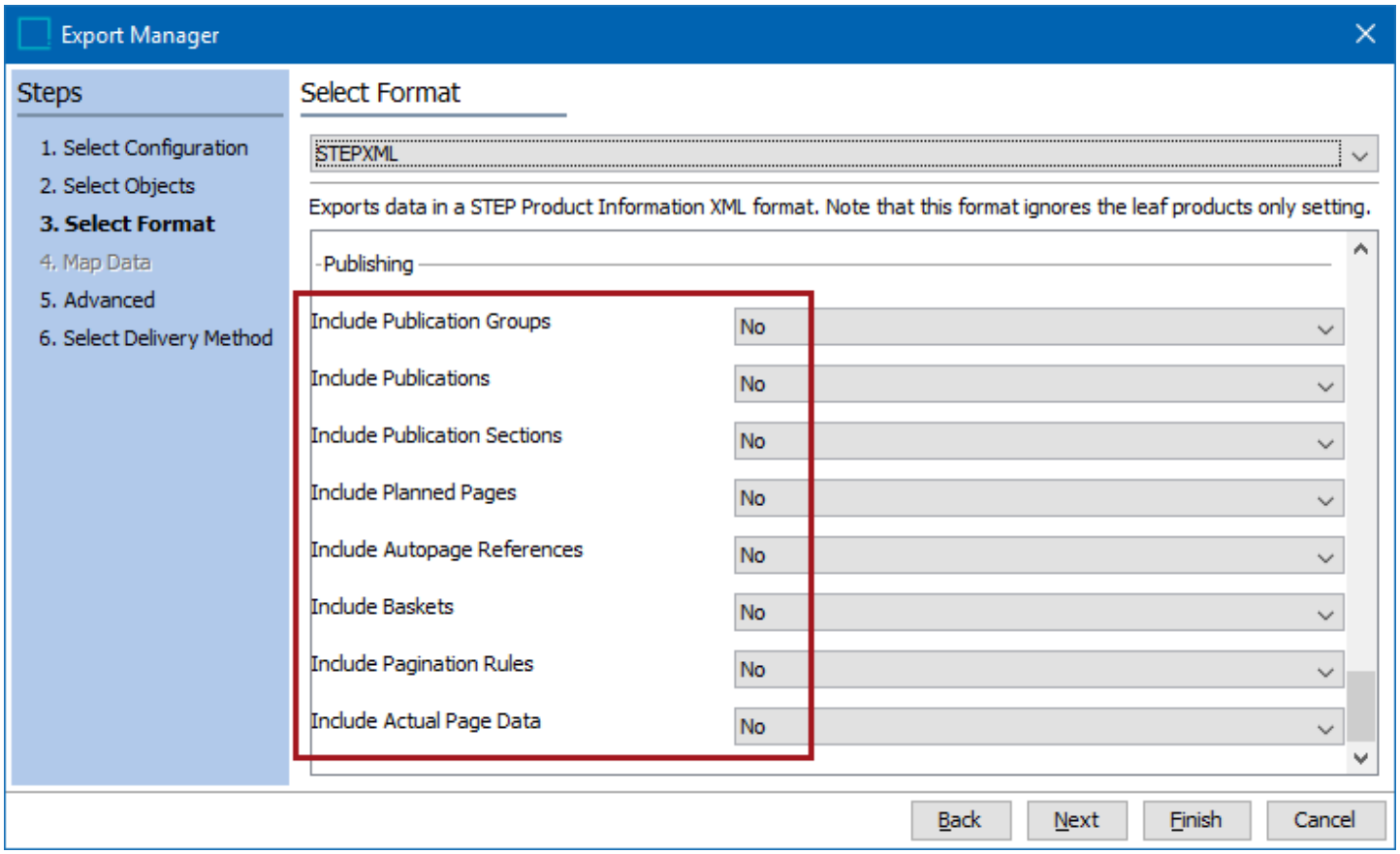
1. To initiate the export, follow the initial steps outlined in the **Creating a Data Export** topic in the **Export Manager** documentation.

2. On the Select Objects screen, add the publication hierarchy object(s) that you would like to export by following the steps outlined in the **Export Manager - Select Objects** topic in the **Export Manager** documentation. You can also initiate the export by right-clicking on a publication group, publication, or section object in the publication hierarchy and selecting 'Export Data Below.'
3. Choose **Publication Objects** from the 'Export' dropdown in the lower right corner of the wizard, then click **Next**.

   - If the publication contains more than one version, a version can be selected from the dropdown list in the **Version** column. Typically, the contents of the export will be the same regardless of which version is selected. However, in some cases it may be necessary to select a version if there are differences on actual pages saved to STEP. For example, a different product or asset may be mounted to an English version but not a French version.



4. On the Select Format screen (step 3), choose **STEPXML** from the dropdown list.
5. The STEPXML outbound parameters that apply to publication objects are highlighted in the below screenshot.



Choose the relevant information that you want to include in your export, then click **Next**. All other default options can be left as-is (for example, 'Include Products' = Minimum).

Note: The only options available for publication parameters are 'All' or 'None.' You may need to experiment with the combination of objects selected in the Select Objects step and the 'All' settings chosen in the Select Format step to ensure that you do not get too much or too little information in your export. For instance, if you export from a publication object and select 'All' for 'Include Publication Groups' but 'None' for 'Include Publications,' the export will include all publication groups that exist in your STEP system as well as the single publication selected, even though 'None' was selected for publications.

- The following publication parameters are relevant for **all** types of publications (standard STEP Publisher, Flatplanner, and AutoPage):
  - Include Publications
  - Include Publication Groups
  - Include Publication Sections
  - Include Actual Page Data: relevant if you have saved mounted DTP documents into your publication
- The following options are valid for Flatplanner publications. For more information, see **Exporting and Importing Flatplanner Publications in STEPXML** in the **Flatplanner** documentation.
  - Include Planned Pages

  - Include Baskets
  - Include Pagination Rules
- The following options are valid for AutoPage publications. For more information, see **Exporting and Importing AutoPage Publications in STEPXML** in the **AutoPage** documentation.
  - Include Autopage References
  - Include Pagination Rules

> **Note:** Include Autopage References is also relevant for standard 'drag and drop' publications if objects have been linked to the publication sections to organize them for mounting. However, since it is more common practice to link objects to sections in AutoPage publications, this option is instead detailed in **Exporting and Importing AutoPage Publications in STEPXML** in the **AutoPage** documentation.

6. The Map Data step is skipped as with any other STEPXML export, since data is not mapped in the STEPXML format.
7. The options in the Advanced step and the Select Delivery Method step are the same as those available for any other type of STEPXML export. See **Export Manager - Advanced** and **Export Manager - Select Delivery Method** in the **Export Manager** documentation for more information.

> **Note:** Though the **Select version used to resolve tables** option references publication versions, this setting is only relevant if the 'Include Tables' parameter is set to 'Yes' in the Select Objects step. This setting has no impact on publication-only exports. For more information, see the **Exporting Resolved Tables** topic in the **Tables** documentation.

File Example

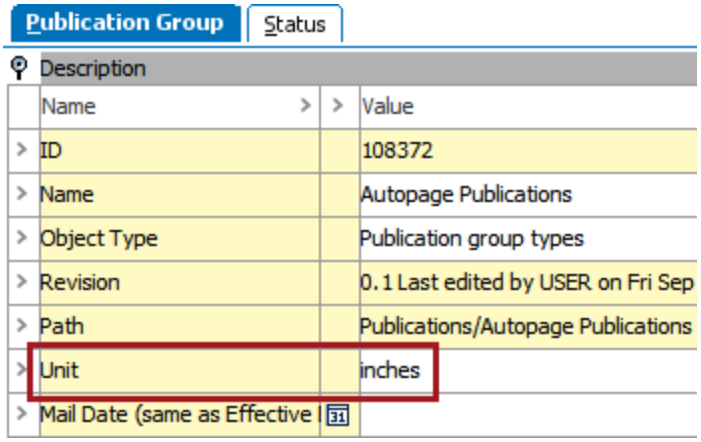
For an example of how these STEPXML files are laid out, see the online version of this topic.

Information Included in the Export

The following sections explain the data included in the STEPXML file in the order in which it appears in the file.

Include Publication Groups

```
</PublicationGroup>
<PublicationGroup UserTypeID="Publication group root" ParentID="Publication hierarchy root" ID="108198" UnitID="inches">
  <Name>Flatplanner Publications</Name>
  <MetaData>
    <Value AttributeID="LastPageNumber" Derived="true">0</Value>
    <Value AttributeID="CatalogGroupTheme">Acme Party Supplies - Since 1955</Value>
  </MetaData>
</PublicationGroup>
```

Tag	Description
<PublicationGroup>	Returns the following information: • UserTypeID: The object type of the publication group • ParentID: The ID of the parent publication group • ID: The STEP ID of the publication group • UnitID: The ID of the default unit set on the publication group 
<Name>	Returns the STEP name of the publication group
<MetaData>	Parent tag for <Value> tags
<Value>	Returns the ID (AttributeID) and value of the description (metadata) attributes present on the publication group. If an attribute is calculated, Derived="true."

Include Publications & Include Publication Sections

```
<Publication UserTypeID="Default publication type" MasterDocumentID="107822" DTPType="InDesign" ParentID="108718" ID="108813">
  <Name>Acme Toys</Name>
  <MetaData>
    <Value AttributeID="CatalogTheme">Acme General Store</Value>
    <Value AttributeID="LastPageNumber" Derived="true">0</Value>
  </MetaData>
  <Version ContextID="Context2" WorkspaceID="Main" ID="208627">
    <Name>French FR</Name>
  </Version>
  <Version ContextID="Context1" WorkspaceID="Main" ID="123669">
    <Name>English US</Name>
  </Version>
  <ProductTemplateLink ProductTemplateID="107821"/>
  <ProductTemplateLink ProductTemplateID="108803"/>
  <PublicationSection ID="108819" UserTypeID="Section">
    <Name>Dolls</Name>
    <MetaData>
      <Value AttributeID="FirstPageNumber" Derived="true">0</Value>
      <Value AttributeID="LastPageNumber" Derived="true">0</Value>
    </MetaData>
  </PublicationSection>
</Publication>
```

Publication Information

Tag	Description
<Publication>	Returns the following information: • UserTypeID: The object type of the publication • MasterDocumentID: The ID of the publication template linked to the publication • DTPType: The DTP (desktop publishing) platform used in the publication, which will always be InDesign. This is a backward-compatible tag from previous versions of STEP where there could have been a choice between InDesign and Quark as the DTP type. • ParentID: The ID of the publication's parent publication group • ID: The ID of the publication
<Name>	Returns the STEP name of the publication
<MetaData>	Parent tag for <Value>
<Value>	Returns the ID and value of the description (metadata) attributes present on the publication. If an attribute is calculated (as shown in the above example), Derived ="true."
<Version>	Returns the following information:

Tag	Description
	• ContextID: The ID of the context used in the publication version • WorkspaceID: The ID of the workspace used in the publication version • ID: The ID of the publication version
<Name>	When nested inside the <Version> tag, returns the STEP name of the publication version
<ProductTemplateLink>	Returns the ID of the product template(s) linked to the publication (ProductTemplateID=)

Section Information

Tag	Description
<PublicationSection>	Returns the ID and object type ID (UserTypeID) of the publication section(s) contained within the publication
<Name>	Returns the STEP name of the publication section
<MetaData>	Parent tag for <Value>
<Value>	Returns the ID and value of the description (metadata) attributes present on the publication section. If an attribute is calculated (as shown in the above example), Derived="true."

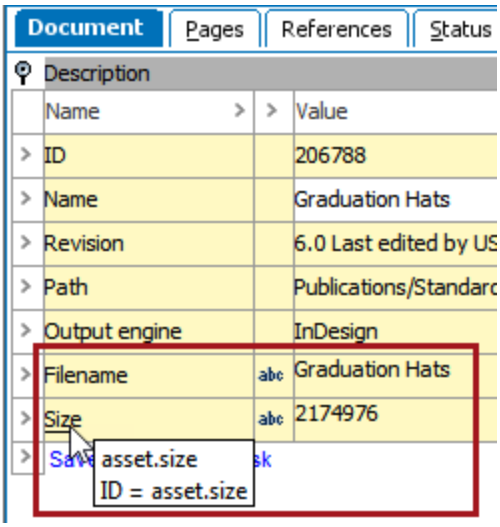
Include Actual Page Data

When actual mounted InDesign pages are saved into STEP, they appear in the STEPXML file as <Assets>.

Note: Actual page assets are not nested within the publications that contain them but appear in a separate section in the XML file. The **VersionID** indicates which publication version the assets are stored in. To determine the publication, the version should be matched to the publication that contains it. The VersionID for the pages will typically match the publication version is chosen in the Select Objects step of the Export Manager.

```
<Assets>
  <Asset ID="111824" UserTypeID="InDesign Document">
    <Name>PetPartyHats</Name>
    <Values>
      <Value AttributeID="asset.size">1417216</Value>
      <Value AttributeID="asset.filename">PetPartyHats.indd</Value>
    </Values>
    <Pages>
      <Page ID="111825" VersionID="111818" PageNumber="1">
        <Name>1</Name>
        <ProductCrossReference ProductID="121190" Type="MountedProduct" MountLocation="true"/>
        <ProductCrossReference ProductID="121183" Type="MountedProduct" MountLocation="true"/>
        <ProductCrossReference ProductID="121218" Type="MountedProduct" MountLocation="true"/>
        <AssetCrossReference AssetID="111667" Type="MountedAsset"/>
        <AssetCrossReference AssetID="111666" Type="MountedAsset"/>
        <AssetCrossReference AssetID="111663" Type="MountedAsset"/>
      </Page>
    </Pages>
  </Asset>
</Assets>
```

Tag	Description
<Asset>	Returns the ID and the UserTypeID (object type) of the InDesign document, which will always be 'InDesign Document.'
<Name>	Returns the STEP name of the InDesign document. This can be different from the file name returned within the <Value> tag.
<Value>	Returns the values of the system metadata attributes 'asset.size' and 'asset.filename'

Tag	Description
	
<Page>	Returns the following information: • ID of the page • VersionID: The ID of the publication in which the page is stored • PageNumber: The page number of the individual pages within the InDesign document. InDesign documents typically have multiple pages.
<ProductCrossReference>	Returns the following information: • ID of the products mounted onto the page • The 'reference type' of the product 'link' (Type="MountedProduct") • The status of whether the product is actually on the page (MountLocation="true"). The value is false if the product is not actually on the page and is just referenced; for example, in a STEP table listing product accessories. If MountLocation="false", then the product will not be included in an index export. **Note:** No actual reference or link types are used to link products onto pages. They are linked onto pages by being mounted in InDesign.
<AssetCrossReference>	Returns the following information: • ID of the assets mounted onto the page • The 'reference type' of the asset 'link' (Type="MountedAsset"). **Note:** No actual reference or link types are used to link assets onto pages. They are linked onto pages by being mounted in InDesign.

Creating an InDesign Package in STEP

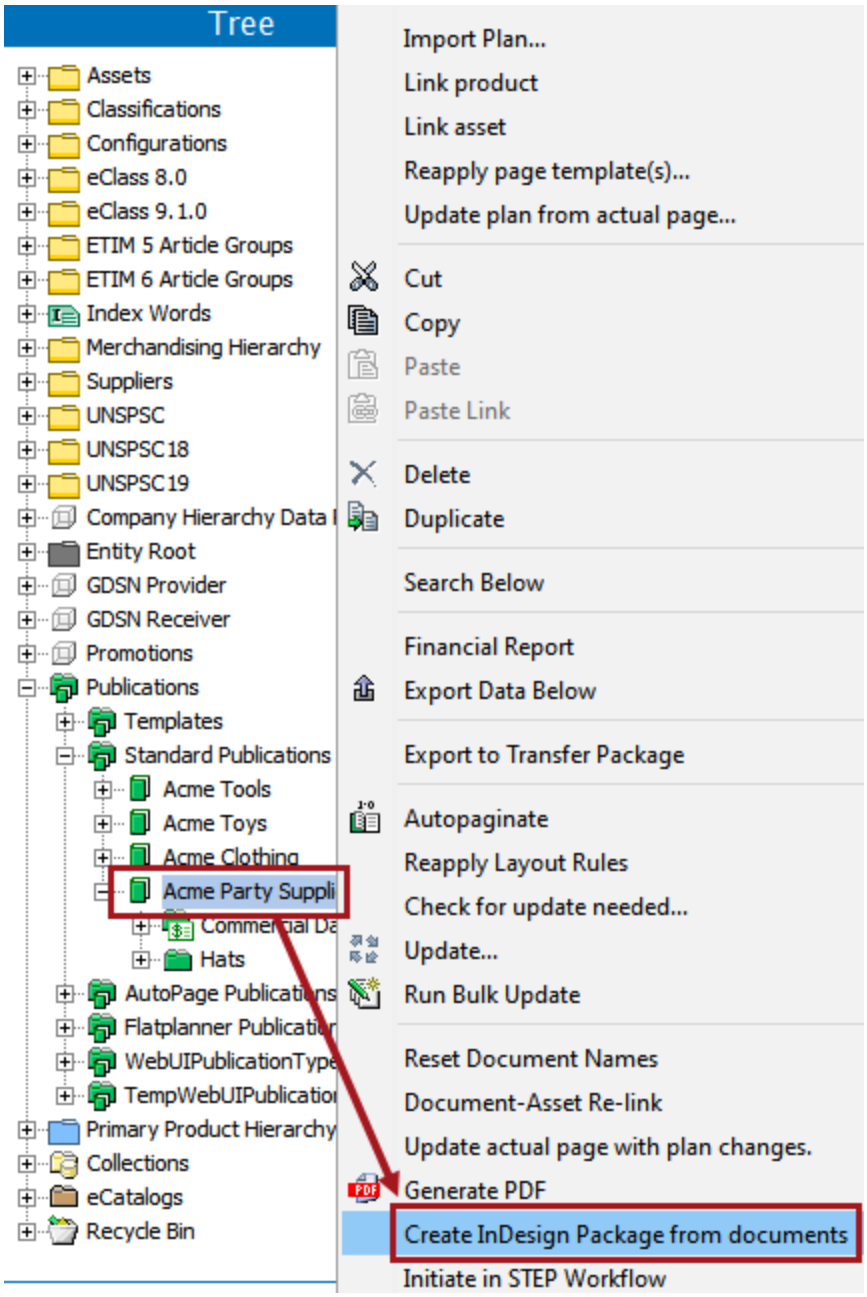
Once all InDesign pages have been created and saved back into a publication in STEP, you can generate an InDesign package from the publication from within the workbench. An InDesign package contains all of the InDesign files, fonts, and images (links) associated with the publication. Once created, an InDesign package can be sent to a printer.

Note: An InDesign package is not the same thing as a publication transfer package. For more information, see the **Working with Publication Transfer Packages** topic.

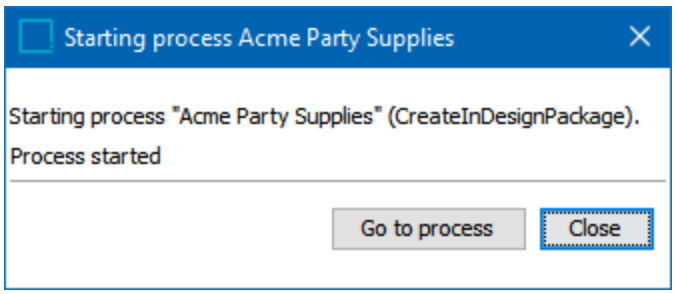
This topic assumes that your STEP system is connected to an InDesign server. An InDesign server is required to create InDesign packages. If your system is not connected to an InDesign server, contact your Stibo Systems account manager for assistance.

Follow these steps to create an InDesign package:

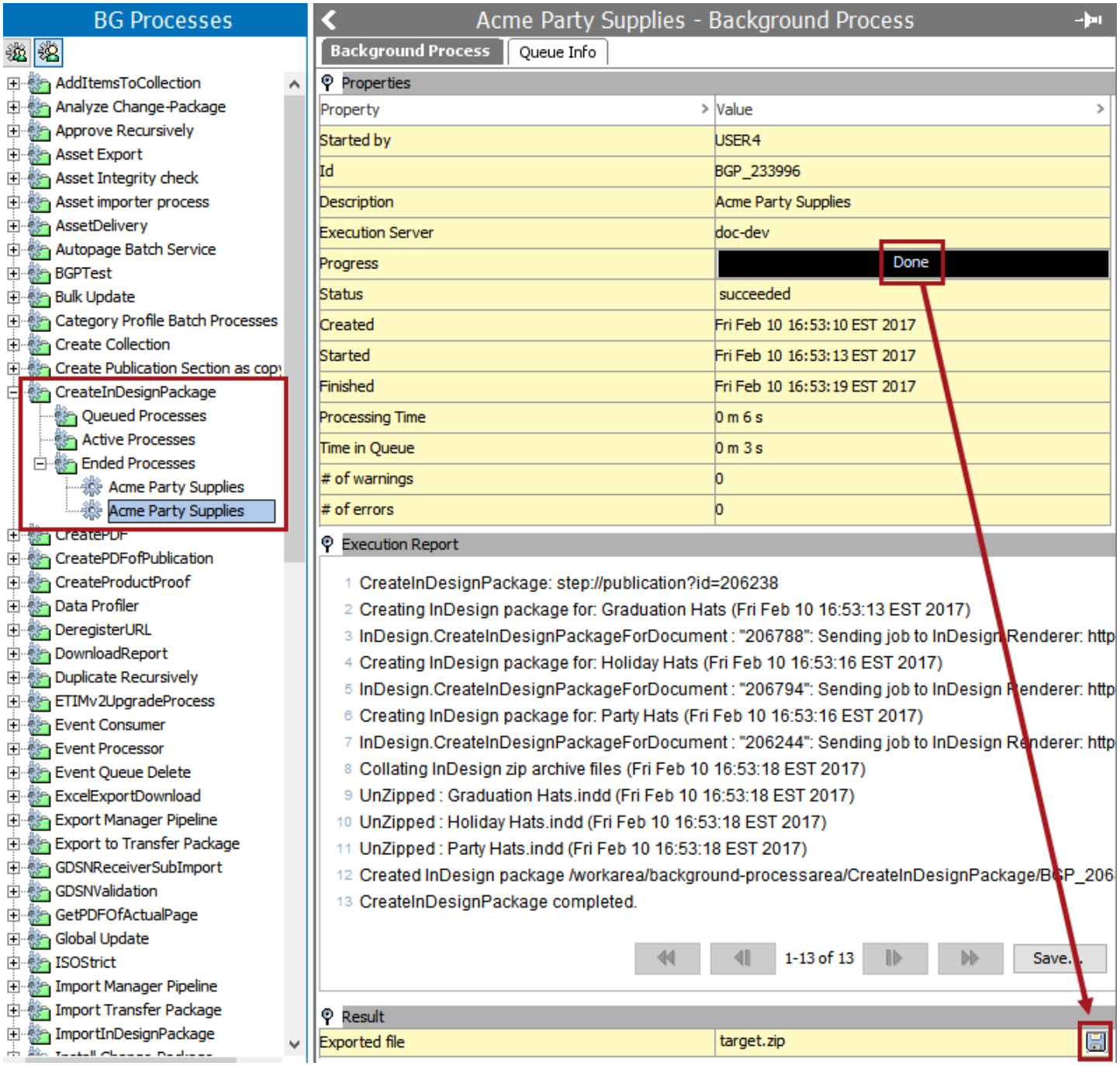
1. In the **Tree**, locate the publication from which you would like to export the InDesign package. Note that a package can also be pulled from the section level if you do not want to generate a package for the entire publication at one time.
2. Select the publication, then right-click and select **Create InDesign Package from documents**.



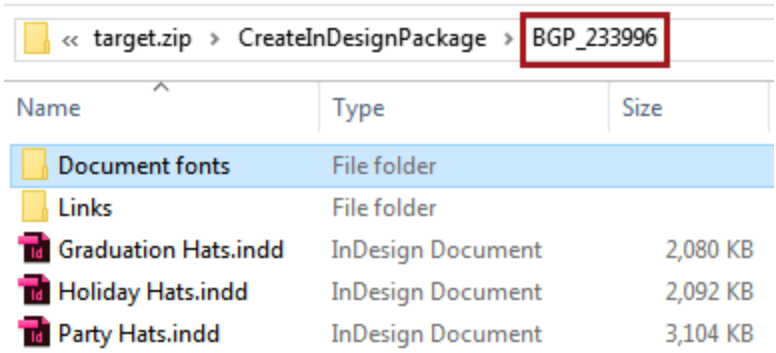
3. A 'Starting process' dialog displays. Click **Go to process**.



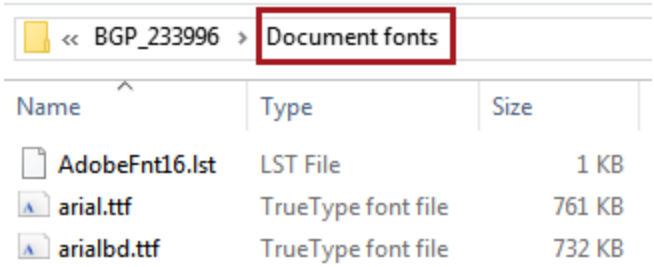
4. The system will automatically redirect to the **BG Processes** tab and display the progress of the package creation. The Execution Report section of the screen includes information on what InDesign documents are being extracted as well as what InDesign server renderer the job(s) are being sent to. If errors are encountered, they are also displayed.
5. When the process is done, click on the **target.zip** icon in the lower right corner of the interface and save the .ZIP file to a location on your hard drive.

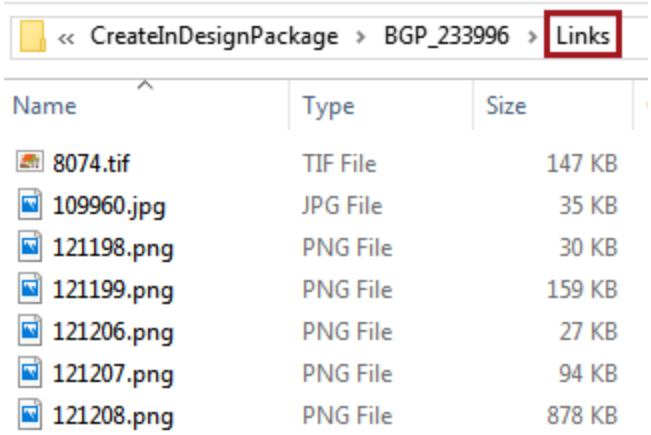


6. The .ZIP package contains all InDesign files from the publication / section, as well as a 'Document fonts' and 'Links' folder. These files are located in the .ZIP package in a folder named with the ID of the background process (e.g., BGP_233996).



The following screenshots show sample contents of the 'Document fonts' and 'Links' folders:





Considerations

- If asset links do not appear in the package, the document contains broken links and the images will need to be relinked before they can be extracted. For information on how to relink assets, see the **Relinking Assets in STEP Publisher** topic.

- InDesign pages will appear in the package just as they were saved in STEP. If a single InDesign file is desired that contains all pages, the files must be combined into the single document locally.

Working with Publication Transfer Packages

Publications and their accompanying templates can be exported from one STEP system and imported into another through the use of **publication transfer packages**.

Publication transfer packages enable the exporting of entire STEP publications and their associated templates into a .ZIP folder, which can in turn be easily imported to STEP in a single operation. These transfer packages contain the following items:

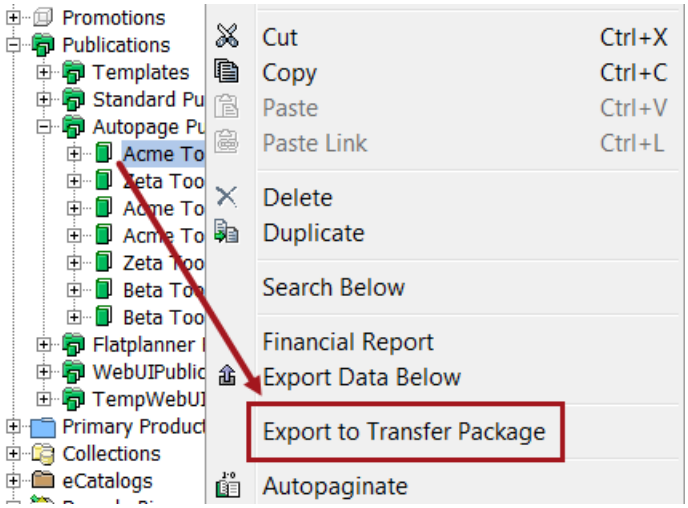
- Publication Excel spreadsheet
- Publication STEPXML file
- Publication templates
- Product templates
- Page templates *(for Flatplanner publications only)*
- XML mapping files that link the STEP names of all templates to STEP IDs
- Export configuration property file

Note: Your STEP system must be connected to an InDesign server in order to import publication transfer packages. If your system is not connected to an InDesign server, contact Stibo Systems for assistance.

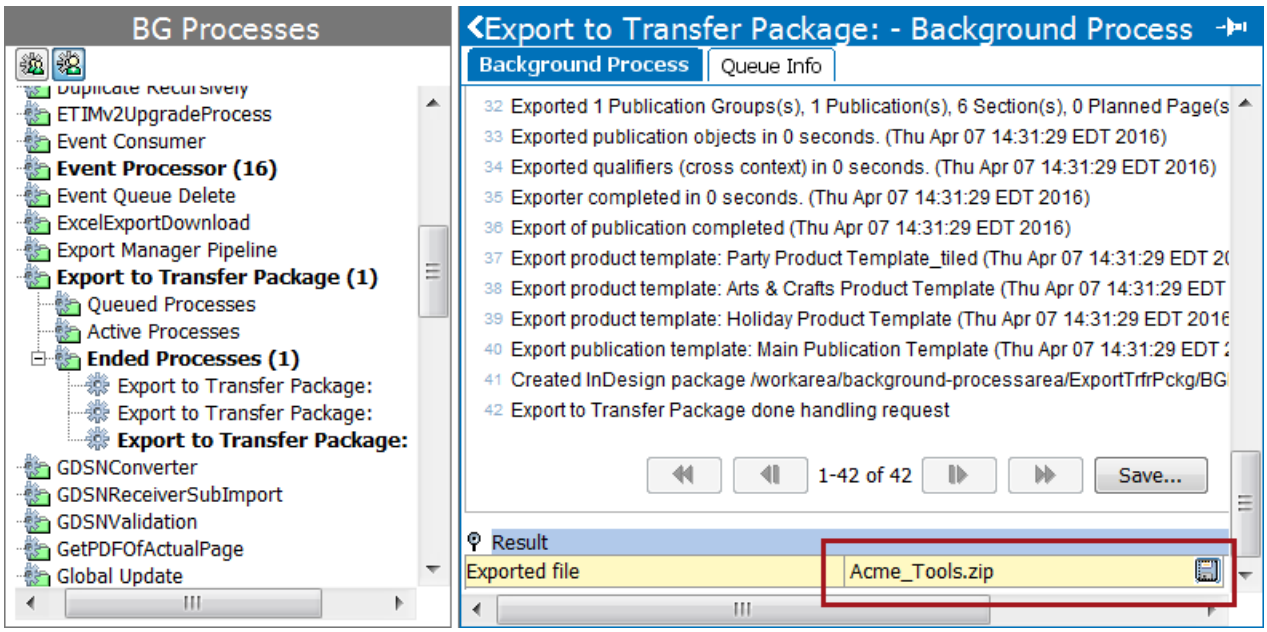
Exporting a Publication Transfer Package

To create a transfer package for export, follow these steps:

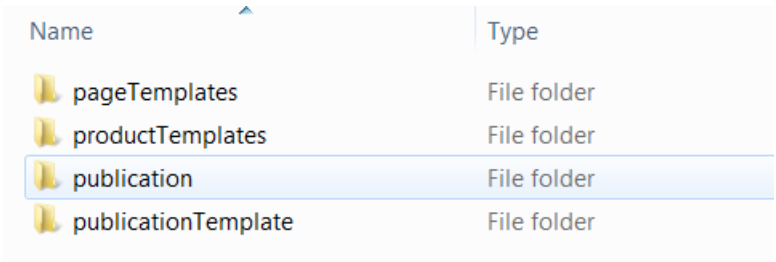
1. In the Tree, navigate to the publication that you would like to export.
2. Right-click on the publication and select **Export to Transfer Package**.



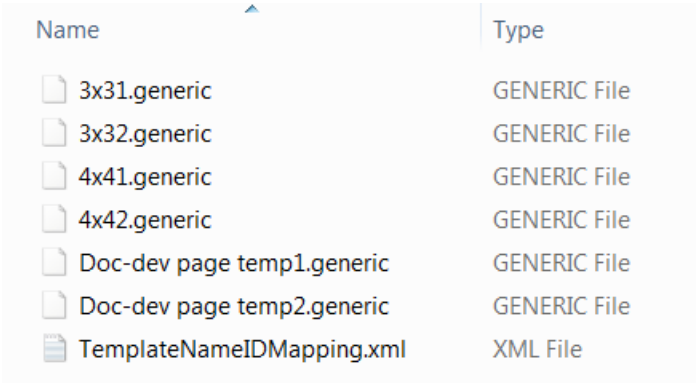
3. A background process starts and the 'Starting process Export to Transfer Package' dialog displays. Click **Go to process** in order to view the background process on the BGProcesses tab.
4. When the export process is complete, click on the file icon (located at the bottom right corner of the **Background Processes** tab screen), then save the .ZIP file to a location on your computer.



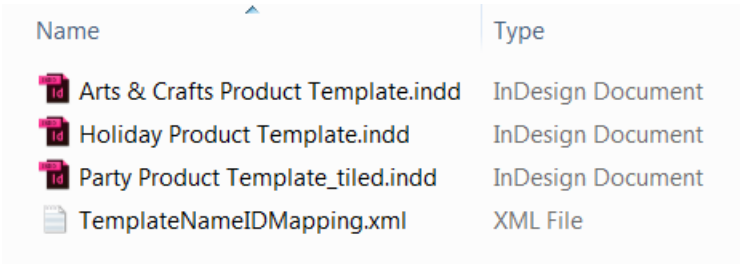
5. There is no need to extract the contents of the .ZIP file, as the .ZIP file itself is the transfer package that will be used to import the publication and templates into STEP. The folders contained in the .ZIP file are as follows:



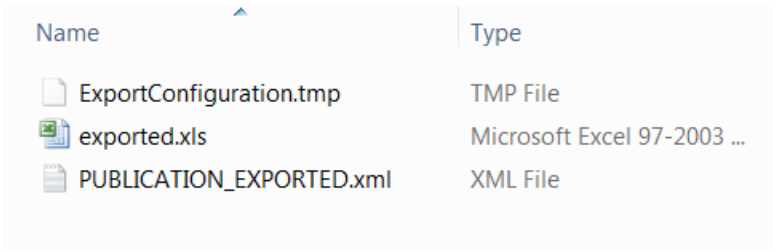
- **pageTemplates:** Contains all page templates associated with the publication and an XML file (TemplateNameIDMapping.xml) that maps the file names of the templates to their corresponding STEP IDs. The pageTemplates folder is always included but will only contain content when a Flatplanner publication is exported.



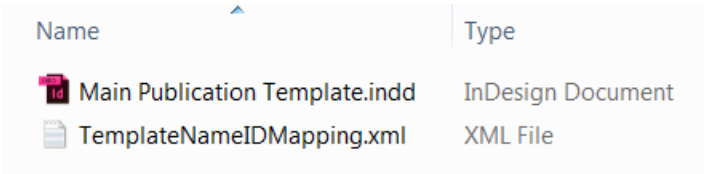
- **productTemplates:** Contains all product templates associated with the publication plus an XML file (TemplateNameIDMapping.xml) that maps the file names of the templates to their corresponding STEP IDs.



- **publication:** Contains a Publication Excel sheet, a publication export STEPXML file (PUBLICATION_EXPORTED.xml), and an export configuration file (ExportConfiguration.tmp).



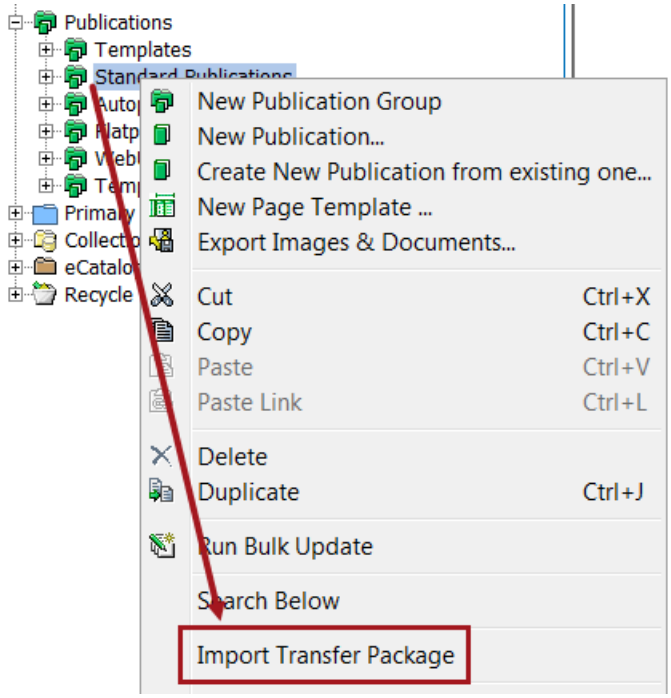
- **publicationTemplate:** Contains the publication template associated with the publication plus an XML file (TemplateNameIDMapping.xml) that maps the file name of the template to its corresponding STEP ID.



Importing a Publication Transfer Package

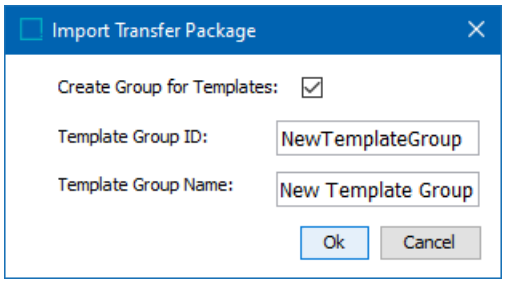
To import a publication transfer package, follow these steps:

1. In the Tree, navigate to the publication group into which you would like to import the transfer package.
2. Right-click on the publication group and select **Import Transfer Package**.



3. The 'Select Zip File' dialog displays. Navigate to the publication transfer package .ZIP file that you would like to import, then click **Open**.
4. In the 'Import Transfer Package' dialog that displays, check the **Create Group for Templates** box if you would like to create a new publication group to house the templates contained within the transfer package. This new group will be created inside of the publication group that you have selected.

   Enter an ID and a name for the new publication group, then click **Ok**. If you leave the box unchecked, then the templates will be imported directly into the publication group that you have selected.



5. A background process starts and the 'Starting process Import Transfer Package' dialog displays. Click **Go to process** to view the background process on the BGProcesses tab.
6. When the background process completes, the publication and its associated templates are now created on the destination system. If you checked the **Create Group for Templates** box in step 4, this new publication group is also created.

Note: If the Publication Excel / Publication STEPXML files in your transfer package contain the IDs of products, classifications, or assets that do not exist on the destination system, these objects will **not** be created in the destination system.

Setting up PDF Profiles (Presets) for the InDesign Server

Users who create PDF files via STEP Publisher can take advantage of InDesign's **Adobe PDF Presets** option (also referred to as **PDF Profiles**) to control the quality of the created documents. This topic explains how to configure STEP to work with existing (standard) or custom PDF profiles.

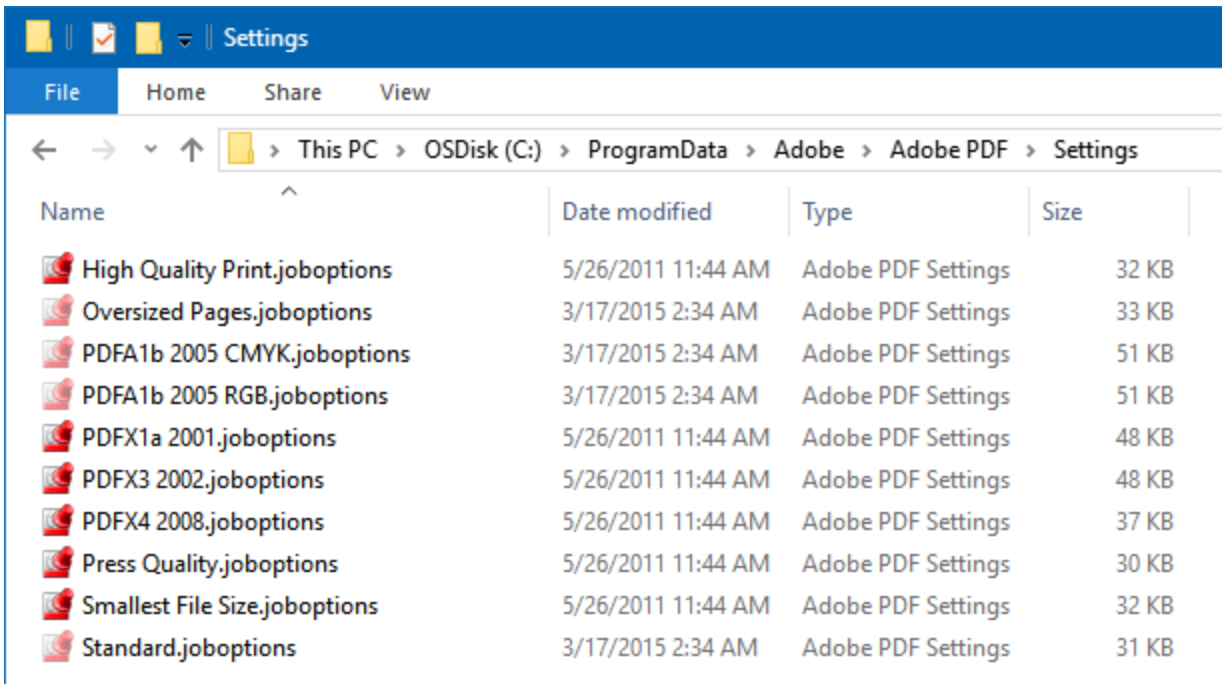
In InDesign, a PDF preset is a configuration file that contains a series of options that define how a PDF file should be created. PDF presets can be accessed and defined in InDesign from the menu options located under File > **Adobe PDF Presets**. STEP has no concern or control over the choice made within any profile setup; the system merely calls the selected profile when presenting the document to the InDesign Server (IDS) and asks it to create the PDF.

Since STEP Publisher users are assumed to have a basic familiarity with Adobe PDF Presets, this topic does not explain how to create or modify them. For more information, see the 'Adobe PDF options' online help topic: https://helpx.adobe.com/indesign/using/pdf-options.html.

Standard PDF Profiles

Every InDesign client and server installation includes several standard PDF presets / profiles. These configuration files have an extension of .joboptions and are stored in a specific location.

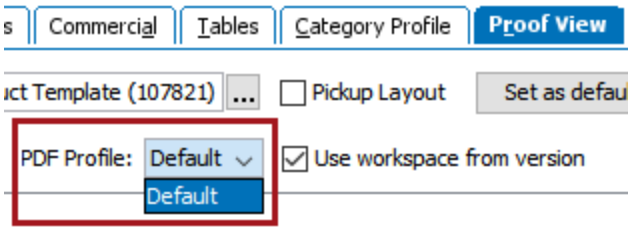
For **Windows** installations, this location can be one of two places, depending on the version of Windows. Assuming that Windows is installed on the C drive, the file path for Windows 7 and above is: C:\ProgramData\Adobe\Adobe PDF\Settings



For older versions of Windows, the file path is: C:\Users\All Users\Adobe\Adobe PDF\Settings. For **Mac** installations, the location is: /Library/Application Support/Adobe/Adobe PDF/Settings

Standard PDF Profile Configurations

Within STEP, there are several ways to request a PDF file, depending on whether you want a PDF of a Flatplan or AutoPage document, or even a product PDF proof. But, no matter which method is used to request a PDF, they all ask for which PDF profile to use. The following screenshot, taken from the Proof View tab on a product object, shows one location where a PDF Profile is chosen from a dropdown list.



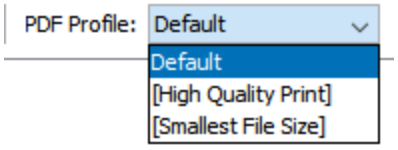
In order for the dropdown list in STEP to display more than just 'Default,'an entry must be made in the **sharedconfig.properties** file that lists which presets / profiles should be included in this dropdown list. The entry 'Default' is not really a selection of a profile. It just means that when STEP sends the document to InDesign without any profile selected, InDesign will use its own internal default settings.

To add additional profiles to the dropdown list, create a suitably named group (e.g., 'Adobe PDF Profiles') in the sharedconfig.properties file, then add the following parameter. In this example, the added profiles are called 'High Quality Print' and 'Smallest File Size.'

```
InDesign.PDF.Profiles=Default,[High Quality Print],[Smallest File Size]
```

```
#=============================================================================
# Adobe PDF Profiles
#=============================================================================
InDesign.PDF.Profiles=Default,[High Quality Print],[Smallest File Size]
```

Once the profiles have been added to the sharedconfig.properties list (assuming that these profiles already exist and are located in the standard file location), the dropdown will now resemble the following:



Considerations When Adding Presets to sharedconfig.properties

Keep the following considerations in mind when adding PDF presets / profiles to the sharedconfig.properties file:

- Presets that are located in InDesign's 'standard' profiles folder must be surrounded with square brackets, as shown in the previous example. This is so the IDS will know whether the profile is standard (brackets) or custom (no brackets). The server will look in one folder location or the other, depending on the presence or absence of the square brackets. This is not a STEP designed requirement; it is Adobe's.
- The list of profiles is comma separated—do not put a space after the comma.
- Adding this entry to the sharedconfig.properties file will require a restart of both the STEP application server and the IDS.

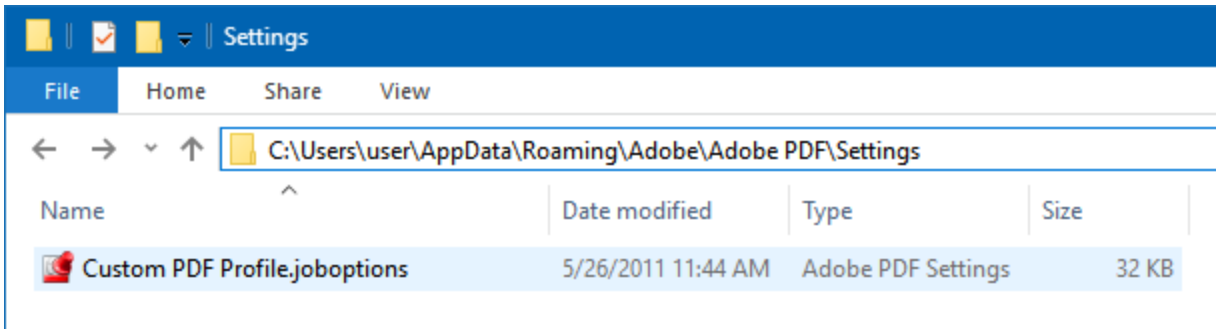
Custom PDF Profile Configurations

If none of the standard presets / profiles suits your requirements, you can add a custom PDF profile to the IDS. This profile must first be created in an InDesign client as a .joboptions file. Then, the .joboptions file must be copied to a folder on the IDS. All PDF profiles have the extension .joboptions. So if you create a profile with the name 'My Special PDF Profile,' its file name will be *My Special PDF Profile.joboptions*.

Note: You should only copy your custom PDF Profile to the IDS when you are completely satisfied that it meets your requirements. It is not practical to troubleshoot PDF profiles by using STEP to generate PDFs via the IDS.

When you are satisfied that your PDF profile is doing what you need it to do, then you have two options when copying the profile to the IDS. But, first you need to know where to find the custom profile that you created on your local machine, because it is not stored in the same folder as the standard profiles.

For Windows installations, assuming the software is installed on the C drive, the location of the custom profiles is: C: \Users\'username'\AppData\Roaming\Adobe\Adobe PDF\Settings



For **Mac** installations, the location is: Users/'username'/Library/Application Support/Adobe/Adobe PDF/Settings

Note: In both cases 'username' = the user name you entered when you signed on to the PC or Mac. For both PC and Mac, the custom profiles will be held in folders that are specific to the user.

Copying Custom Profiles to the InDesign Server

Two options are available when copying the custom profile (e.g., 'My Special PDF Profile.joboptions') to the IDS:

- Save the profile in the Adobe IDS folder for the standard profiles
- Copy it to the location where the custom ('user') profiles are held

Depending on what you choose, the entry you make in the sharedconfig.properties file will be slightly different.

Note: Creating custom profiles and copying the .joboptions files to the IDS will in itself have absolutely no effect on the dropdown list in STEP for the selection of a PDF profile. The only profiles that STEP knows about is what you have entered in the sharedconfig.properties file.

If you copy your custom profile(s) into the IDS 'standard' folder, then the entries in your sharedconfig.properties file will look something like this, with all profiles (except Default) surrounded in square brackets:

```
InDesign.PDF.Profiles=Default,[My Special PDF Profile],[High Quality Print],
[Smallest File Size]
```

If you copy your custom profile(s) into the folder specific to the user 'stibosw' on the IDS (stibosw is the standard user set up in an IDS installation), then your entries in the sharedconfig.properties file will look something like this, with no brackets around the profile names:

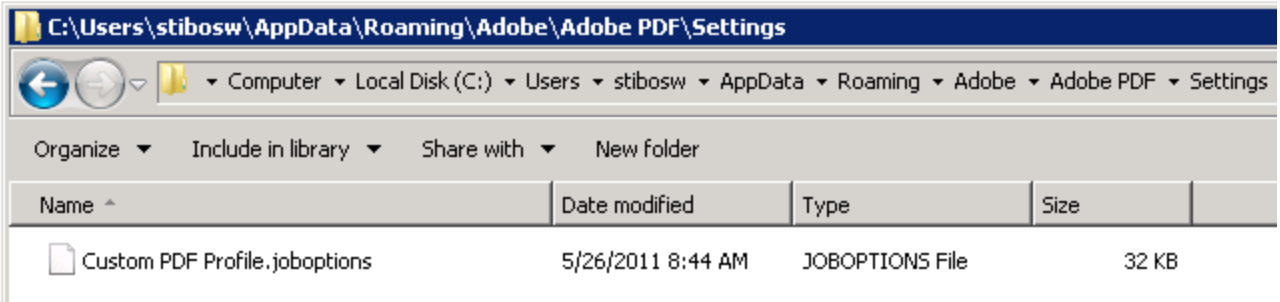
```
InDesign.PDF.Profiles=Default,My Special PDF Profile,[High Quality Print],[Smallest
File Size]
```

In other words, if the profile is located in the 'standard' folder, the entry in the properties file must have square brackets surrounding it. If the profile is in the folder specific to the user, then it does *not* have surrounding square brackets.

Location Considerations for Standard vs. Custom PDF Profiles

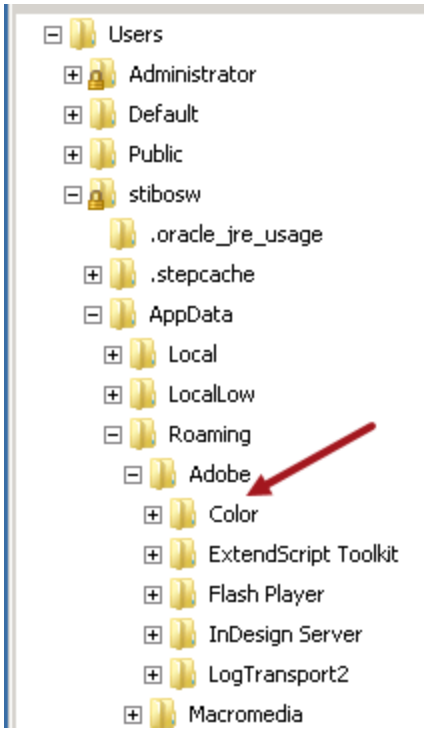
Though it may seem that the custom .joboptions files should always be copied into the standard folder on the IDS instead of the user-specific folder, if the IDS server software is reinstalled or upgraded to a different patch level, the 'standard' folder will be overwritten. When this happens, you will lose your custom profiles, unless you have saved a copy of them and put them in a safe place.

For **Windows** installations— assuming the software is installed on the C drive and that stibosw is the user name that was used when the STEP'n'design service was started—the location of the custom profiles is: C:\Users\stibosw\AppData\Roaming\Adobe\Adobe PDF\Settings



For **Mac** installations, again assuming that stibosw is the user name, the location is: Users/stibosw/Library/Application Support/Adobe/Adobe PDF/Settings.

In some cases, the user-specific folder is not created on the IDS. To place your custom profiles in the user-specific folder, you must create the folder. The below screenshot shows an IDS machine where the user-specific Adobe PDF folder (to hold the custom profiles) is not present, so it must be created manually.



Additional Considerations for PDF Profiles – Font and Setup Issues

Two common issues that may occur when setting up PDF profiles for STEP concern fonts and incorrect configurations in the setup.

PDF Profiles – Common Font Problems

It is the user's responsibility to make sure that all appropriate fonts have been properly loaded to the IDS so that they can be embedded in the resultant PDF files (to avoid any font substitution issues).

For example, fonts that have been introduced to a Mac-based IDS may not have been made available to all users (the 'computer'), and are only valid to the user that logged on to the machine. This may cause InDesign to produce PDF files with substitute fonts, because it cannot find the fonts that were loaded and made available to a user other than 'stibosw.' This is by far the most popular cause of font substitution issues on a Mac-based IDS.

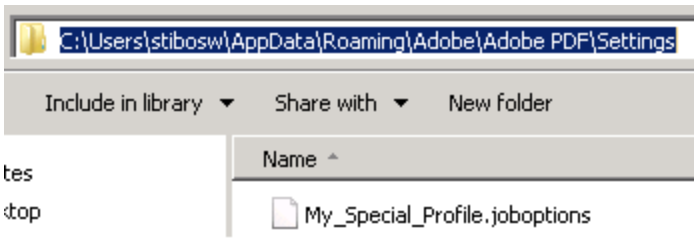
For a Windows-based IDS, the most common issue concerning fonts is that even though installing a font onto a Windows machine is very straightforward, the font is not registered until the Windows machine has been rebooted. Thus, if you install a font on a Windows-based IDS, you can visually see that the font is available, but it will not be read by the IDS until the Windows machine has been rebooted. Thus, it is not sufficient to stop and restart the InDesign Server.

PDF Profiles – Common Setup Problem

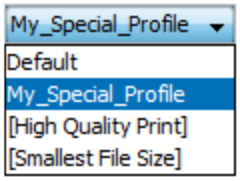
The following example shows a 'user error' scenario in which the PDF profiles are not recognized by the system due to an incorrect configuration.

User configuration:

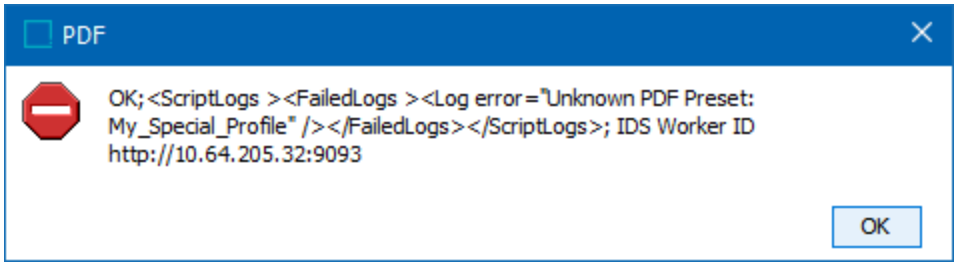
1. You created a custom profile on your InDesign client and called it My_Special_Profile.
2. You copied the My_Special_Profile.joboptions file to the IDS at the location: C:\Users\stibosw\AppData\Roaming\Adobe\Adobe PDF\Settings



3. You made sure that you updated the sharedconfig.properties file correctly, i.e., you did not surround the profile name with square brackets. So:InDesign.PDF.Profiles=Default,My_Special_Profile,[High Quality Print],[Smallest File Size]



4. You restarted both the IDS and the App server.
5. You tried creating a PDF using the 'standard' profile High Quality Print. It was successful. But when you tried to create a PDF of a product using the profile My_Special_Profile, you were greeted with an error message:

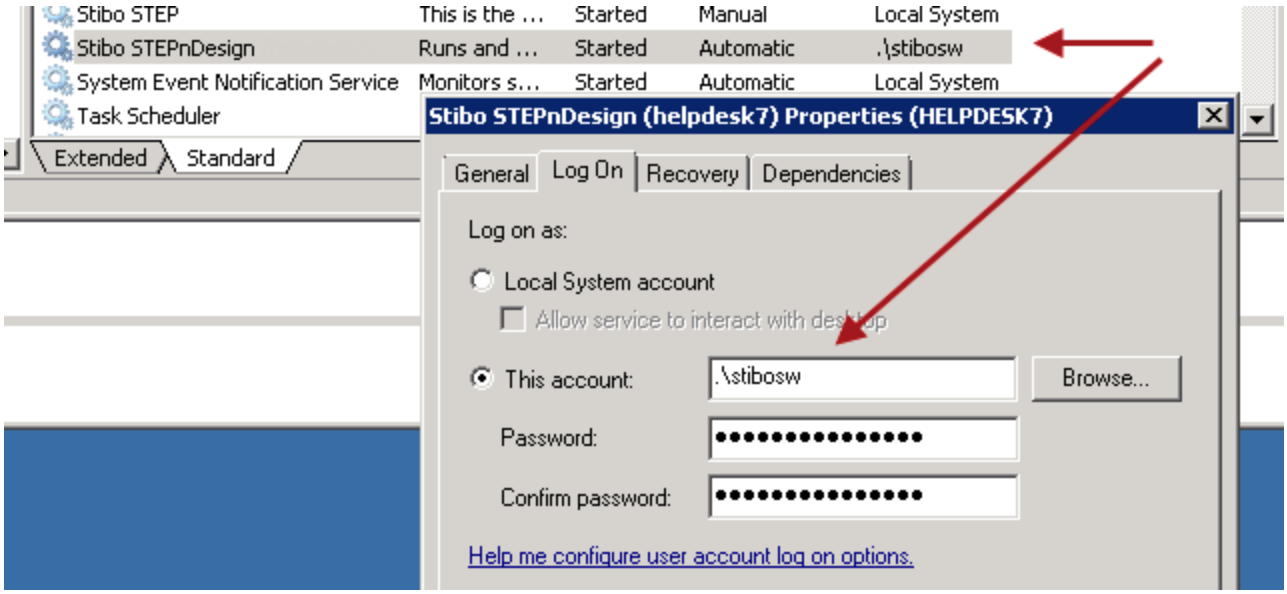


What went wrong?

1. The IDS never detected the presence of the .joboptions file in the stibosw (user-specific) folder because the setup of the Stibo Systems StepnDesign service did not specify which username/login should be used to start up the InDesign service. It was set to 'Local System.' Thus, the IDS never looked into the folder structure

\Users\stibosw, etc., to try and find the .joboptions file.

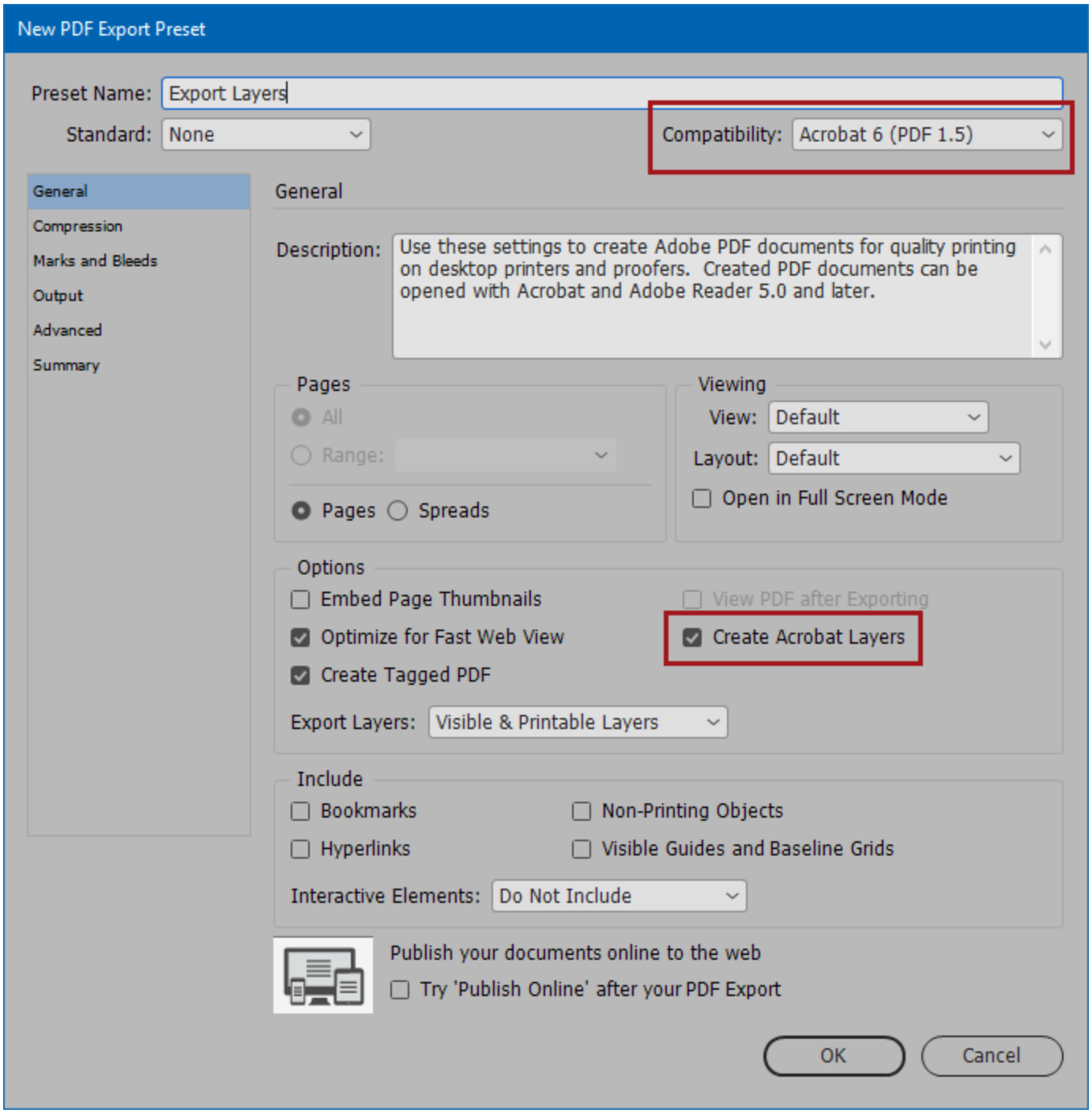
2. Once the Log On properties were changed so that a specific user name was used when starting the STEPnDesign service, the IDS did find the presence of the .joboptions file in the stibosw folder structure, and the PDF could be created using the custom PDF profile.



Using PDF Profiles to Generate Multi-versioned Publications in Layered PDFs

If generating a PDF of a publication with multiple versions, content from all versions will be mounted onto a single layer in the PDF unless a PDF profile is used that is specifically configured to export Acrobat layers. For example, if generating a PDF of a multi-versioned publication in AutoPage, if you select 'All' for 'Version,' the system will not automatically generate a layered PDF; all publication versions will be embedded in a single layer within the PDF unless a special PDF profile has been configured.

To get a separate layer for each publication version in the PDF generated from STEP, you must select a PDF profile that exports to **PDF version 1.5** or above and has **Create Acrobat Layers** checked.



Note: Not all PDF viewers support showing layers. E.g., Adobe Acrobat does, but preview on a Mac does not.

For more information on publication layers, see the **Working With Version Layers** topic. For information on creating PDFs of multi-layered publications using AutoPage; see **Generating PDFs in AutoPage** in the **AutoPage** documentation.

Updating Documents From InDesign

A key feature in STEP Publisher is the ability to update previously created page(s) with the latest content changes from STEP. This functionality allows the page-building process to begin even when product data is not yet complete or approved. The update features within STEP Publisher ensure that the contents of your pages always match the corresponding content in STEP.

STEP'n'design supports three ways of updating documents from within InDesign:

- Checking the STEP database for updates
- Selectively choosing which data structure to update
- Direct update, where specific elements on the page are chosen for updates

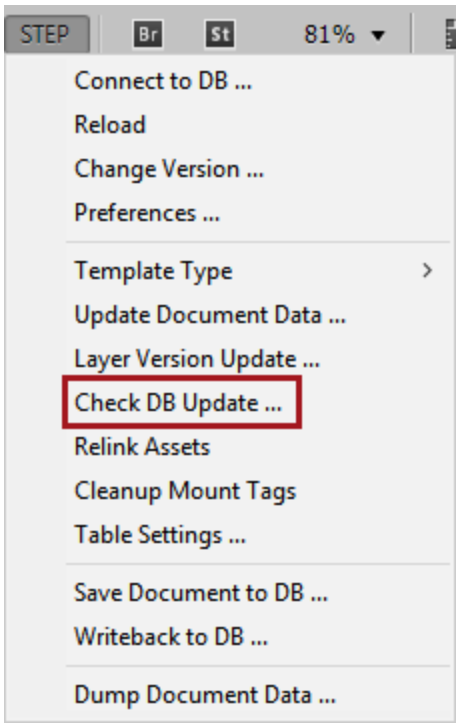
This section describes how to check the content of the document against the corresponding content in STEP—from within InDesign—and how to update previously created pages with the latest changes from STEP.

For information on how to update documents from within the workbench without going into InDesign, see **Updating Documents From the Workbench**. Note that you must have an Adobe InDesign server (IDS) set up and integrated with your STEP application server in order to update documents from within the workbench. If you do not have an IDS, you must update all documents from within InDesign, by the methods detailed within this topic.

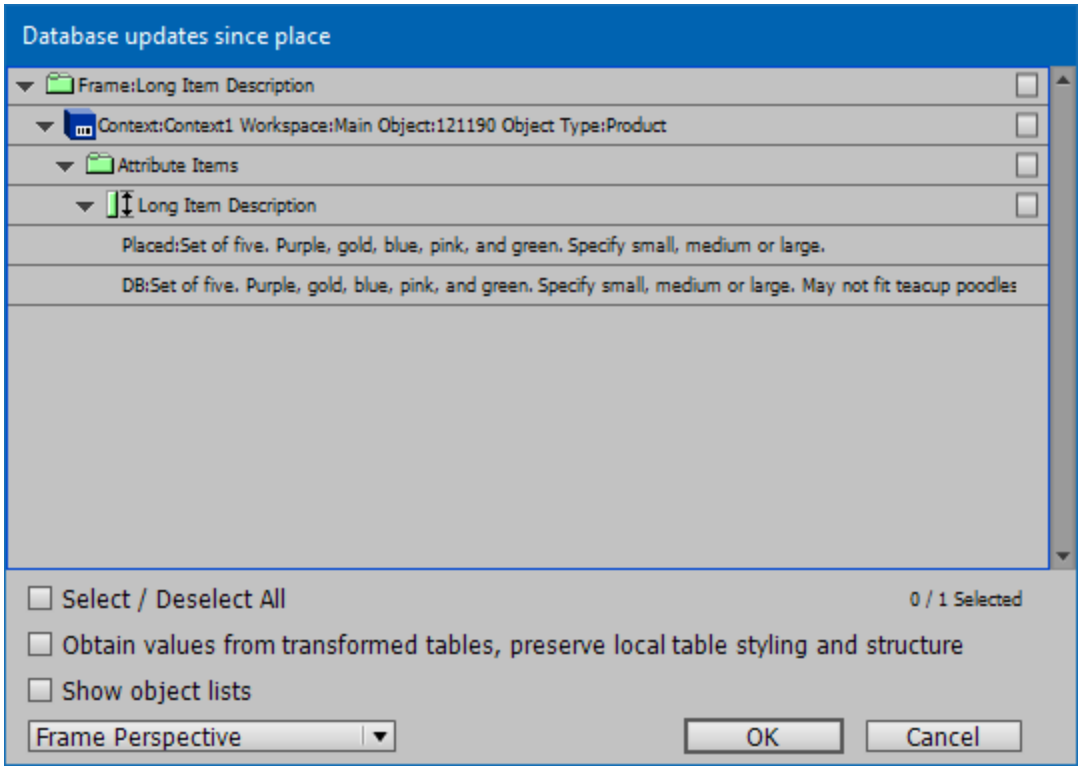
Checking Database Update

Because pages can be built before product data is complete or approved, it is possible, and often necessary, to check the database for updates and update the InDesign pages accordingly throughout the publication production cycle.

1. Open the page that you would like to update, then navigate to STEP > **Check DB Update ...**.



1. The **Database updates since place** dialog displays. This dialog shows a list of elements placed on the page (such as attributes) where the content no longer matches what is in STEP.



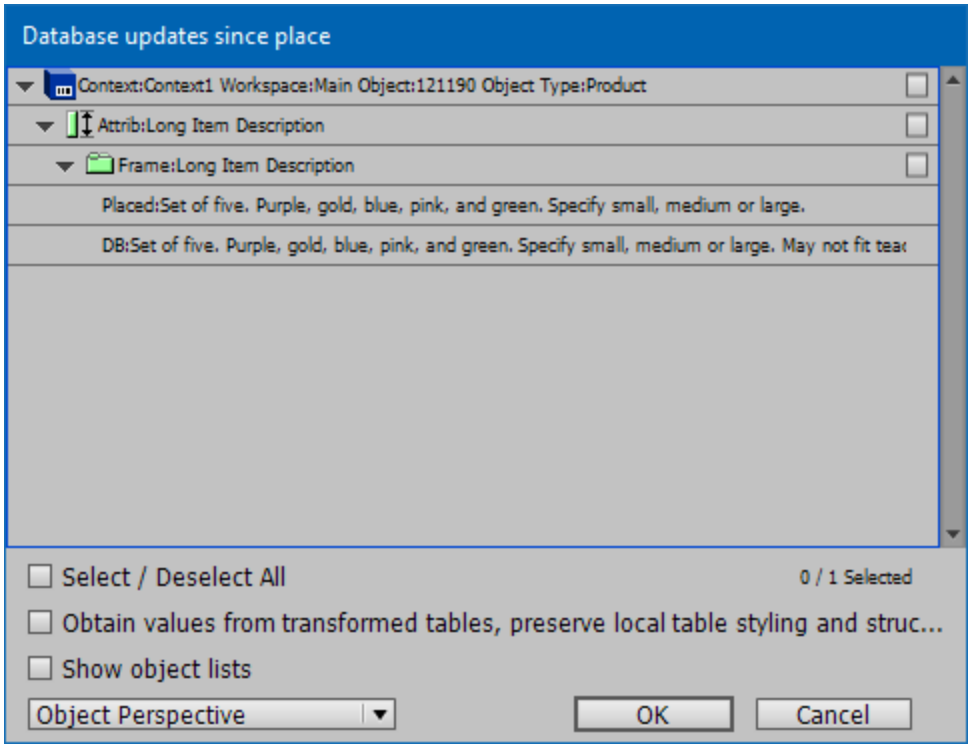
2. Check the relevant boxes on the right side of the dialog to make updates to specific content only. Checking the parent-level change will automatically select everything underneath. To select all boxes at once, check the **Select / Deselect All** checkbox.

3. If a table is chosen for update, check the **Obtain values from transformed tables, preserve local table styling and structure** box in order to retain the existing table structure and only update the values. For example, local styling might have been applied to the table on the InDesign page after its original mount, such as the alteration of row / column sizes or the addition of color shading (either manually or through a previous table transformation). Checking this box ensures that the table structure and formatting remain as-is and only the values are updated. If the box is not checked, the entire table is re-sent from the database (force updated) and any local updates made to the table are lost.

   Note: If actual table structural changes have been made to the table in STEP, such as the addition or removal of rows or columns, then the table will remount regardless of whether you have checked the 'Obtain values from transformed tables' box.

   There are two methods to avoid remounting entire tables. An alternate way of updating a table is to update only the attributes within the table using the **Update Document Data** feature. This feature is detailed in the next section. Also, users may perform a direct data update on the table, which is detailed in the 'Direct Data Update' section.

4. From the dropdown list in the lower left corner, select **Frame Perspective** or **Object Perspective** to change how the list of update candidates is displayed. The previous screenshot in this topic shows how potential DB updates look in the Frame Perspective, which identifies the frame(s) on the InDesign page that contain out-of-date content. The Object Perspective view lists the changes by object, as pictured in the following screenshot.

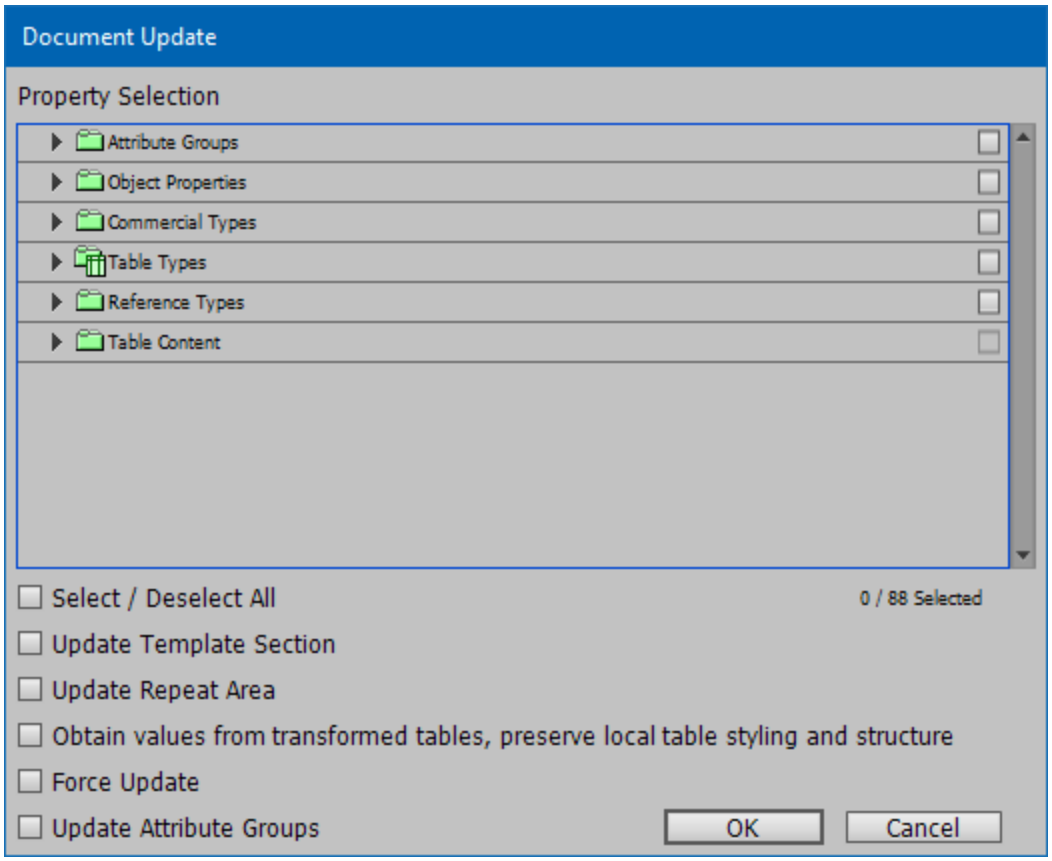


5. Select the **Show Object lists** checkbox to split the dialog box into two areas, with the lower area showing object lists. If repeated areas or template sections have a different object list, then items are shown in the object list.
6. Click **OK** to start the update process, or **Cancel** to exit the dialog.

Updating by Type

You can selectively choose which elements on the page to update if you know that a certain category of data (such as image references, attributes, tables, or commercial data values) have been changed in STEP and you want to update your page to reflect those changes only. You can update either a small set of data, such as one individual attribute, or you can update an entire group of attributes, images, tables, and so forth.

1. With the relevant InDesign page opened, navigate to STEP > **Update Document Data ...**. The **Document Update** dialog displays.



2. Check the relevant boxes on the right side of the dialog to make updates to specific content only. Checking the highest level will automatically select everything underneath. To select all boxes at once, check the **Select / Deselect All** box. Note that boxes will appear for all data categories whether or not they contain changed content. The Document Update feature does not run a check on the page data first to see what needs updating—the dialog provides a list of all data that *can* be updated.

3. Check the **Update Template Section** box to compare the list of objects applicable to a template section to the objects mounted on the page (ignoring order). Additional objects are placed at the end of the list unless deleted items are also found, in which case added items replace the deleted items until there are no more deleted items and the remaining items are then placed at the end of the list. When the **Force Update** checkbox is selected, the template section is removed from the page and replaced with the original gap, etc. settings, causing the objects to appear in the order of the database. This will refresh the selected sections with the current data that is in the database.
4. Check the **Update Repeat Area** box to compare the list of objects applicable to a repeat area to the objects mounted on the page (ignoring order). Additional objects are placed at the end of the list unless deleted items are also found, in which case added items replace the deleted items until there are no more deleted items and the remaining items are then placed at the end of the list. When the **Force Update** checkbox is selected, the repeat area is removed from the page and replaced with the original gap, etc. settings, causing the objects to appear in the order of the database.
5. If a table is chosen for update, check the **Obtain values from transformed tables, preserve local table styling and structure** box in order to retain the existing table structure and only update the values. For example, local styling might have been applied to the table on the InDesign page after its original mount, such as the alteration of row / column sizes or the addition of color shading (either manually or through a previous table transformation). Checking this box ensures that the table structure and formatting remain as-is and only the values are updated. If the box is not checked, the entire table is re-sent from the database (force updated) and any local updates made to the table are lost.

   Note: If actual table structural changes have been made to the table in STEP, such as the addition or removal of rows or columns, then the table will remount regardless of whether you have checked the 'Obtain values from transformed tables' box.

   An alternative way to avoid entire table remounts is to not update the table at all, but to instead update only the attributes *within* the table (by checking a box for an attribute or attribute group in the Document Update dialog) or by performing a direct data update on the table (detailed later in this topic in the 'Direct Data Update' section).
6. Check the **Force Update** box to have all selected values re-sent from STEP and overwrite all associated local changes on the InDesign page. If not selected, the content is only updated if the current value is different to the value when it was mounted. Choosing force update will completely re-push the information from STEP, whether it is different to what is on the page or not. This option could cause a much longer update time if there is a large volume of data being updated since the system is re-pushing all data and not just data that has changed.
7. Select the **Update Attribute Groups** checkbox to update the sequence and number of visible attributes within a referenced attribute group.
8. Click **OK** to update the document to match the content in STEP. Click **Cancel** to exit the dialog.

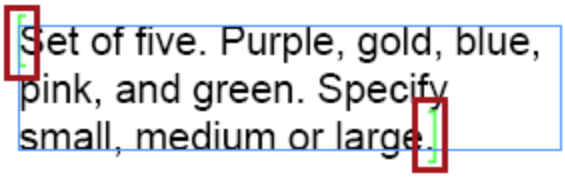
Direct Data Update

Data can be updated directly from the page—an attribute or a table at a time—using the direct data update features in STEP Publisher, which are available through right-click menu options.

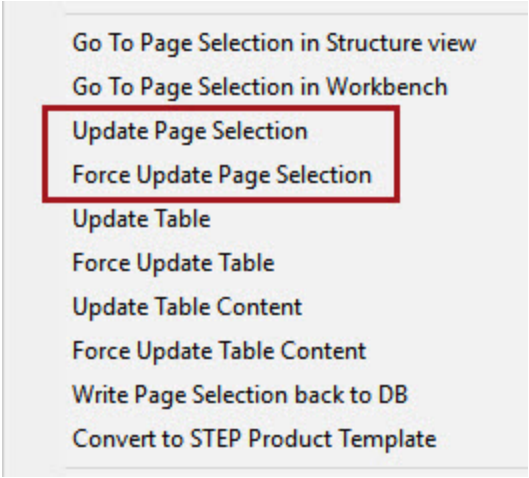
Direct Data Update of Attribute Text

Two options are available for direct data updates of attributes: **Update Page Selection** and **Force Update Page Selection**.

1. Place the cursor within the tag markers (**[ ]**) of the relevant element on the InDesign page, then right-click. (If the tag markers are not visible, click View > Structure > **Show Tag Markers**.)



2. On the popup menu that displays, the data update options appear toward the bottom. (Note that the entire popup menu is not displayed in the below screenshot.)

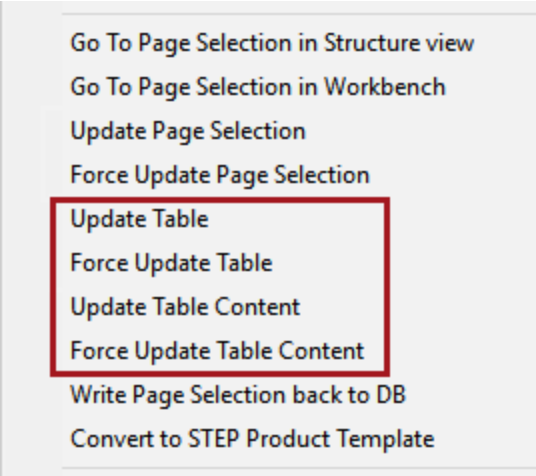


3. Choose **Update Page Section** to update the attribute value if it is different in STEP since mounted on the page.
4. Choose **Force Update Page Selection** to force the attribute value to be updated. (This will update the value whether or not it is different from what is in STEP.)

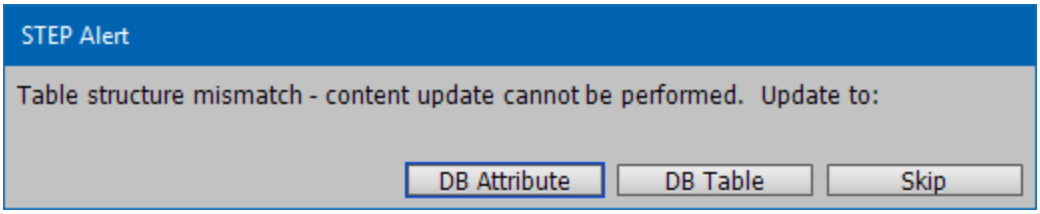
Direct Data Update in Tables

Four options are available for direct data updates of tables: **Update Table**, **Force Update Table**, **Update Table Content**, and **Force Update Table Content**.

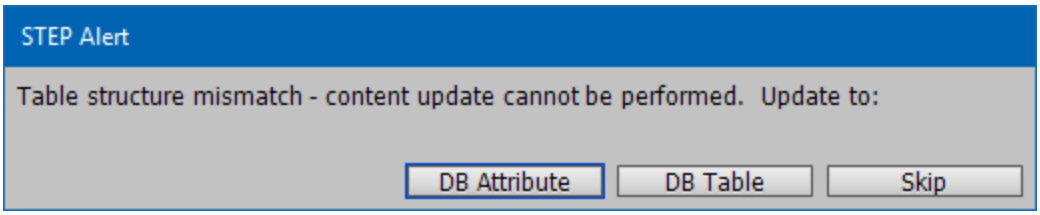
1. Place the cursor anywhere within the relevant table and right-click.
2. On the popup menu that displays, the table data update options appear toward the bottom: (Note that the entire popup menu is not displayed in the below screenshot.)



3. Choose **Update Table** to update the values within the table that have changed since the table was mounted.
4. Choose **Force Update Table** to completely remount the table, which will not only update the values within the table that have changed since the table was mounted, but will update any structural changes and remove any local formatting that was applied to the table since it was last mounted.
5. Choose **Update Table Content** to update every attribute in the table if the table structure matches. The update only takes place if the attribute value is different to that when it was mounted.
   - If both structural changes and changes to content have been made, then a **STEP Alert** dialog box appears. Otherwise, only the content is updated.



   - Click **DB Attribute** to update the content of the table. To update the structural changes as well, click **DB Table**.
6. Choose **Force Update Table Content** to force update the table content with the current values from STEP. This causes all values to be overwritten whether or not they are different than the values in STEP. This option is useful for complex tables, such as tables that contain images.
   - If both structural changes and changes to content have been made, then a **STEP Alert** dialog box appears. Otherwise, only the content is updated.



- Click **DB Attribute** to force update the content of the table. To force update the structural changes as well, click **DB Table**.

Updating Documents From the Workbench

One advantage of using STEP to automate page building in InDesign is the ability to automatically update the contents of previously built pages without having to rebuild them from scratch.

When pages are built (mounted) using STEP Publisher (or an associated component such as AutoPage or Flatplanner), content from STEP is placed onto the page. The placed content accurately reflects how the content existed in STEP at that moment in time. If changes are made later to the corresponding content in STEP (for example, attributes values or referenced images), the pages become out of sync with the latest content.

When this content mismatch occurs, there are several options available within InDesign and STEP Workbench for updating page contents. This topic describes how to use the update options available in STEP Workbench. Methods for updating pages from within InDesign are explained in the **Updating Documents From InDesign** topic.

Additionally, this topic only describes update methods that apply across all STEP Publisher licenses. For more information on how to update pages using AutoPage or Flatplanner, see the following topics:

- **Updating Documents in AutoPage** in the **AutoPage** documentation
- **Updating Documents in Flatplanner** in the **Flatplanner** documentation

Prerequisites

Two important prerequisites must be met before actual pages can be updated from the Workbench:

- The pages must be saved into a publication in STEP
- You must have an Adobe InDesign server (IDS server) set up and integrated with your STEP application server. The IDS server is what enables STEP to run bulk updates on the pages without requiring you to open the pages from an InDesign client. Contact Stibo Systems for assistance if you do not have an InDesign server.

Methods for Updating Documents from the Workbench

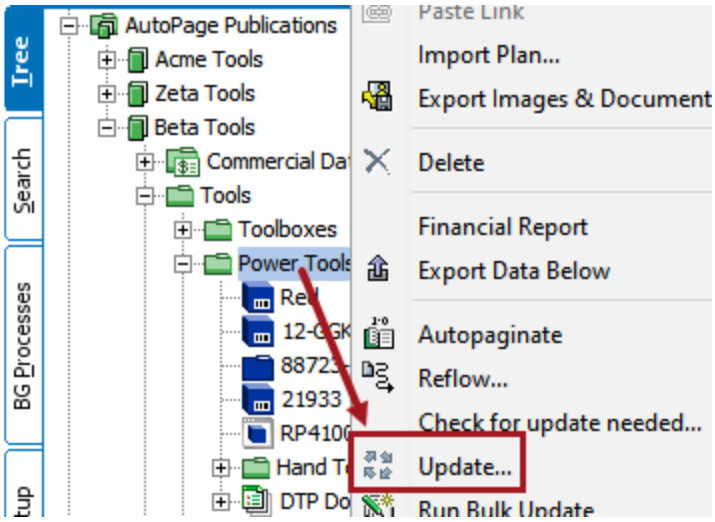
Mounted (actual) pages saved back to STEP can be updated from the Workbench by the following methods for users of any STEP Publisher license: **Update** and **Bulk Update**. Both methods work in a near-identical fashion, but **Update** is the simplest. As such, **Update** is the method detailed in this topic.

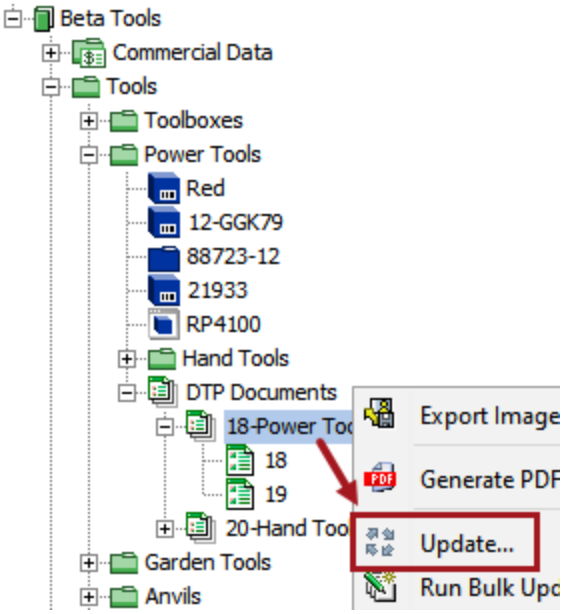
Note: The methods are near-identical because the same dialog detailed in the next section of this topic can be accessed from the Bulk Update wizard. For information on Bulk Update operations for STEP publication documents, see **Publishing: Check Publication Document for Needs Update Operation** in the **Getting Started** / **User Guide** documentation.

Using the 'Update' Feature to Update Documents

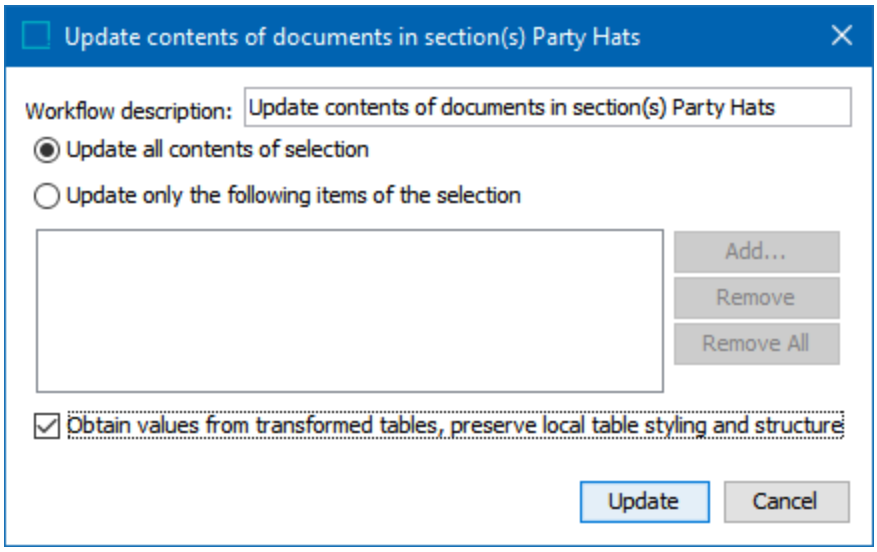
1. Navigate to the relevant publication, section, or DTP document object in the Tree, then right-click and choose **Update...**.

   The first screenshot below shows the Update option accessed from a section. The second screenshot shows the option accessed from a DTP document.

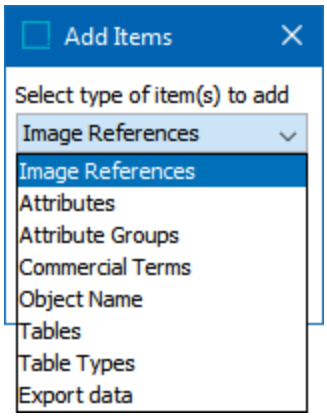




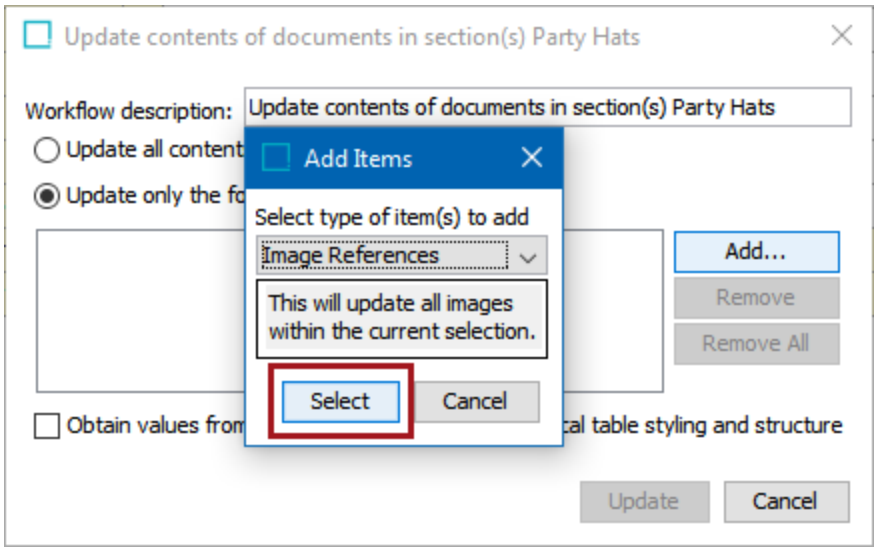
2. The 'Update contents of document(s)' dialog displays.



3. To update all contents on the pages without narrowing your selections (for example, to update all attributes, all image references, and all tables at once), select **Update all contents of selection**.
4. To narrow your selections and choose specific content areas to update, choose **Update only the following items of the selection**, then click **Add**. The **Add Items** dialog displays.



5. Eight options are available from the **Select type of item(s) to add** dropdown. Click 'Select' (pictured in the below screenshot) to add the item types to the 'Update contents' dialog. The chosen options apply to all pages in the selected publication / section / DTP document.



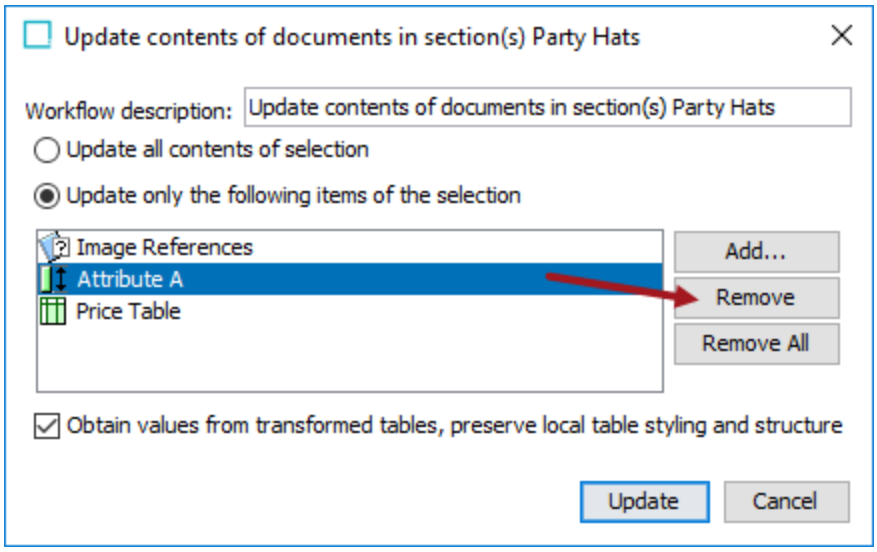
The options and their functionality are as follows:

- **Image References:** Updates all images. No additional options are available to narrow the selection down to specific image reference types.
- **Attributes:** This option allows you to choose specific attributes whose values should be updated. Only individual attributes can be chosen, not attribute groups. However, attributes may be multi-selected by holding Shift or Ctrl when making your selections.
- **Attribute Groups:** Updates all attributes on all pages. No additional options are available to narrow the selection down to specific attribute groups.
- **Commercial Terms:** Updates all values of the selected commercial terms lists.
- **Object Name:** Updates the STEP names of all product objects, classification objects, attributes, and publication section objects.
- **Tables:** Updates the values contained within all STEP tables.
- **Table Types:** Updates the values contained within all STEP tables of the selected table types.
- **Export data:** Updates values within indexes built using AutoPage.

6. In addition to the dropdown options, a checkbox titled **Obtain values from transformed tables, preserve local table styling and structure** is available on the 'Update contents' dialog. This box is relevant for updates in which STEP tables are updated, which is when 'Update all contents of selection' is chosen or when 'Update only the following items of the selection' is chosen and either the 'Tables' or 'Table Types' option is selected from the 'Add items' dropdown.

   This box is checked by default. If left checked, only the values within the tables will update and the tables themselves will not be remounted. If the box is unchecked, not only will the values be updated, but the tables will remount and all local formatting, cell shading from table transformations, and so forth will be lost. In other words, unticking the box causes a 'force update' on the tables.

7. Once your selections have been made, click **Update** to start the update process. If you would like to remove any of your selections before updating, highlight them in the dialog window and click **Remove** (options may be multi-selected by holding Shift or Ctrl).



8. A background process is started that calls the InDesign server. The InDesign server then does the actual page update. When completed, the InDesign server saves a new version of the paginated pages to STEP.

Writing Data Back to STEP

This section describes how to write certain types of data from an InDesign page back to STEP without having to launch the STEP Workbench to first locate the product and attribute.

As the InDesign page is not really designed as a database front end, a range of restrictions apply to the writeback function.

The restrictions are as follows:

- You must have the required user privileges to write data back to STEP, e.g., the ability to modify attribute values
- Data can never be written back to the **Approved** workspace
- Calculated attributes or attributes that have undergone a data transformation (for instance, in a table) cannot be written back to STEP
- Invalid tags or special characters not defined in STEP cannot be written back
- Graphical formatting such as bold, italic, or underscore might be written back to the database if you manage the styles carefully (that is, if this formatting is tied to InDesign character styles that have corresponding style tags in STEP), but is not recommended

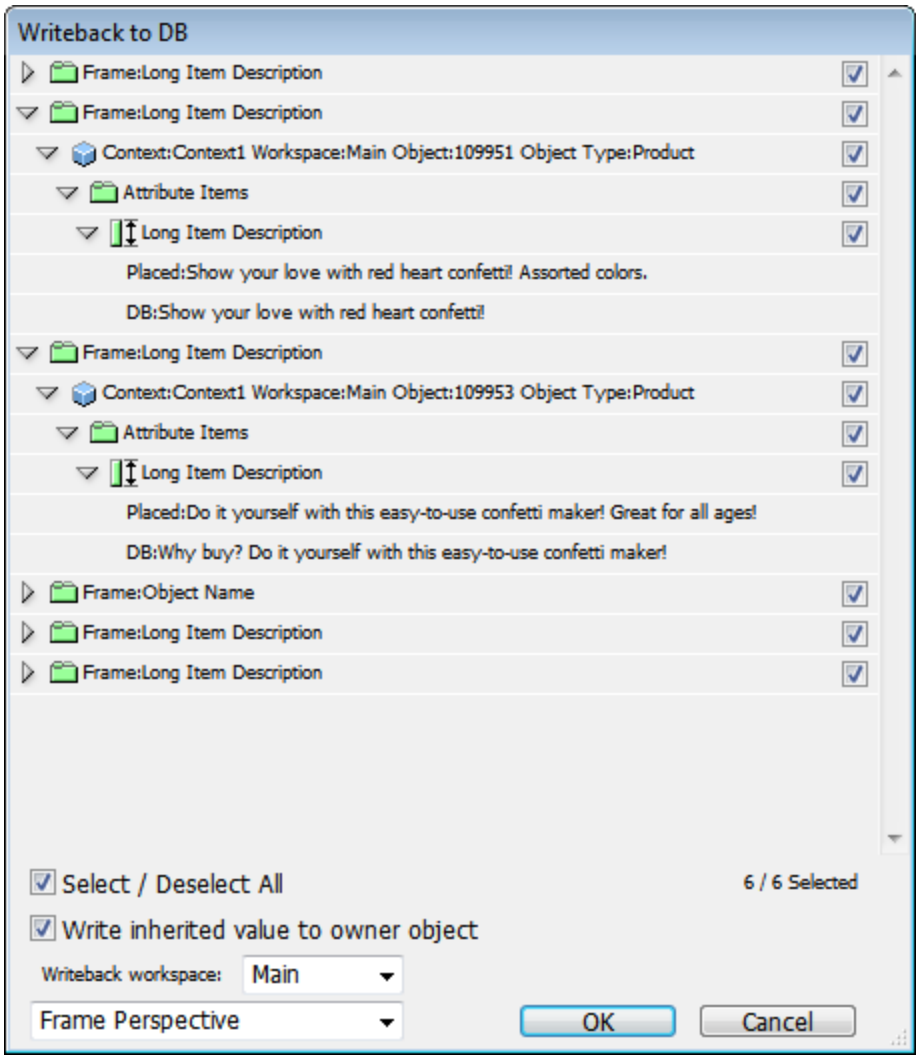
STEP Publisher supports two ways of writing data back from document to database:

- **Writeback to DB:** A general writeback option involving a dialog box that shows all items on the document that can be written back. Users can choose which items should be written back.
- **Write Page Selection back to DB:** A direct writeback option where the specific element that you want to write back to the database is chosen.

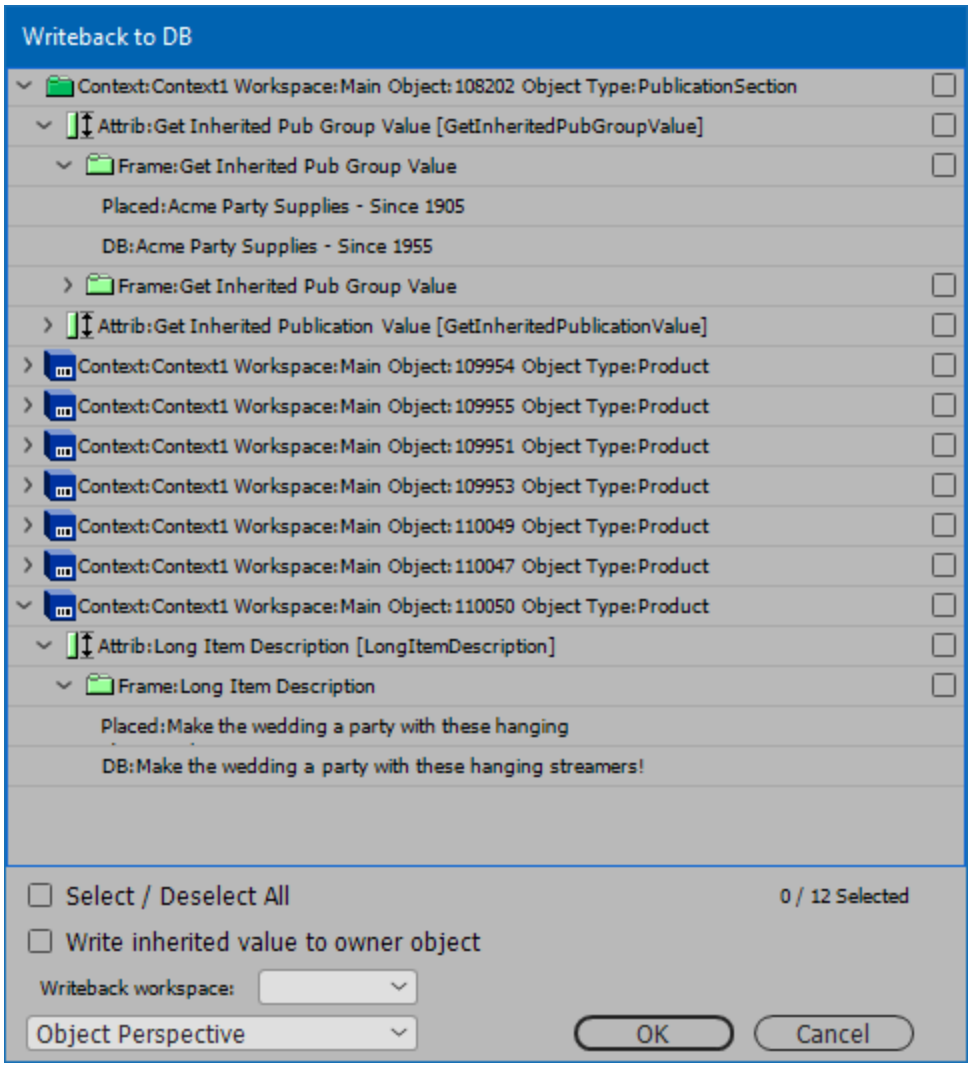
General Data Writeback: Writeback to DB

To perform a general STEP data writeback operation after you have changed some attribute text on the InDesign page, follow these steps.

1. In the STEP menu, click **Writeback to DB**. The **Writeback to DB** dialog box appears.



2. From the list at the bottom of the dialog box, click either **Frame Perspective** or **Object Perspective** depending on how you want your changes to be presented. The above screenshot shows the frame perspective. The below shows object perspective.



1. Select the relevant check boxes to the right for the data you want to write back to STEP.
2. Select / deselect the **Select / Deselect All** checkbox if you want to allow selection / deselection of all items within the Tree. The checkbox indicates how many items have been selected, and the total amount of items.
3. Select **Write inherited value to owner object** if you are writing an attribute value back to STEP from a mounted 'child' object in InDesign. Checking this box will write the locally updated attribute value back to the owner (parent / grandparent) object.
4. In the **Writeback workspace** list, click the workspace you want to write back to. The list displays all created workspaces. If not selecting a workspace, the default value is **Main**.

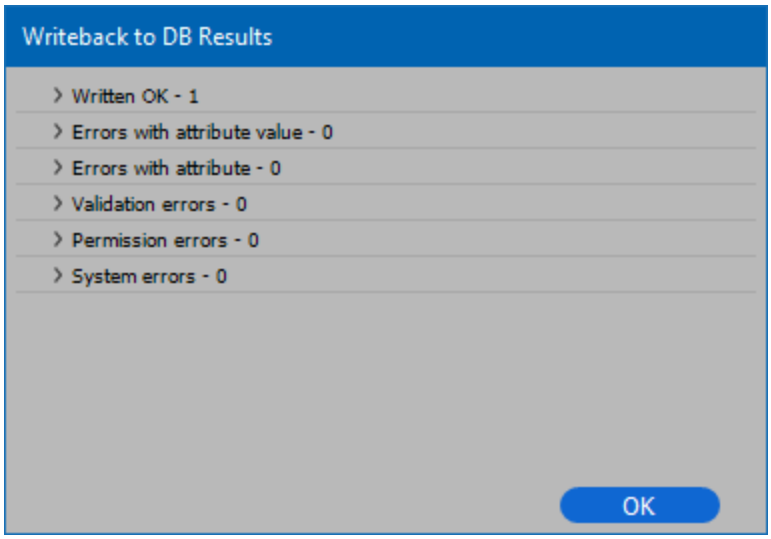
> **Note:** It is extremely rare that an option other than Main will be present, as most systems only use the Main and Approved workspaces. Approved will never be an option, as data cannot be written back to the Approved workspace.

5. Click **OK**. The contents of your attribute on the InDesign page will now be written back to STEP, provided that STEP allows it.
6. A **Writeback to DB Results** dialog box displays. If no errors have been encountered during the writeback process, you may click **OK** to close the window. Users who do not have privileges to make changes in STEP, such as changing attribute values, may receive errors in the **Writeback to DB Results** dialog when attempting a data writeback.

   Additional issues that can cause data writeback to fail include:

   - Read-only attributes, which cannot be updated
   - Attribute validation base type mismatch. For example, an attribute with a number validation has an original value of 112, but a user changes it to a text value (11-2). Another example is date attributes.
   - Input mask on attribute mismatch. For example, in STEP, an attribute has an input mask set to (00.00) but an InDesign user attempts to write back a value of 11.222.
   - List of values mismatch. If a user tries to update a value with an entry that is not in the list, then writeback will fail.
   - Unit of measure mismatch. For example, an attribute uses cm as its unit but a user tries to update the value to km.
   - Inherited attribute values (see the 'Writeback Errors for Inherited Values' section below for more information)

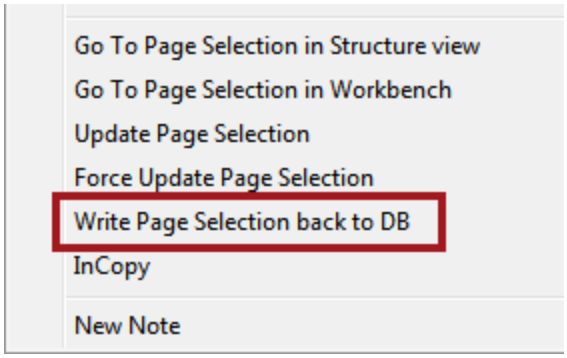
9. After the writeback operation has been performed, STEP will take a few seconds to update.



Direct Data Writeback

To perform a direct STEP database writeback operation after you have changed some attribute text on the InDesign page, follow these steps.

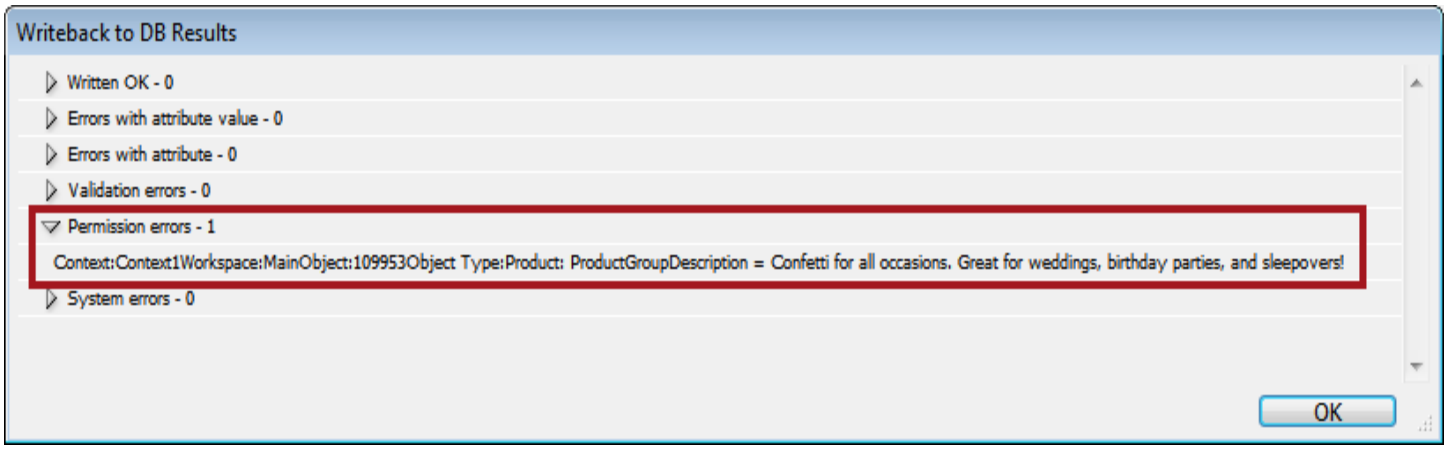
1. Place the text cursor within the item to be written back.
2. Right-click and select **Write Page Selection back to DB**, which appears near the bottom of the popup menu.



Writeback Errors for Inherited Values

If **Write inherited value to owner object** is left unchecked in the **Writeback to DB** dialog box, even users with Super User privileges—who are granted All Setup Actions and All User Actions—will receive a permission error in the **Writeback to DB Results** dialog when attempting to locally update an inherited attribute value from within InDesign. This error occurs because inherited attribute values may not be locally overwritten from within InDesign by anyone. Inherited attribute values may only be locally overwritten in the workbench.

When this error appears, the value(s) contained in the error message have not written back to STEP at all. Thus, the only option to update an inherited attribute value from within InDesign is to write back to the owner object.



Considerations and Limitations for Writeback to Owner

- Writing a value back to an owner (parent / grandparent) object that exists in the Approved workspace will cause this object to become unapproved. Users should take care to ensure that data writeback from InDesign does not impact other processes (such as Outbound Integration Endpoints) that rely exclusively on products in the Approved workspace.
- A dialog containing the **Write inherited value to owner object** checkbox will not appear when writing data back to STEP using the **Write Page Selection back to DB** option. Users will only receive the **Writeback to DB Results** dialog, containing the Permission error(s).
- The **Permission errors** warning is not associated with user privileges as defined under **Users & Groups** in System Setup. 'Permissions' refers to core functionality of STEP Publisher itself, in which no users have the authority to overwrite inherited values from within InDesign.

Relinking Assets in STEP Publisher

Two functions exist within STEP Publisher to relink broken asset links (typically *images*) on mounted pages: **Relink Assets** (which is run via the InDesign Client on an open document) and **Document-Asset Re-link** (which is launched in STEP and causes a background process to run).

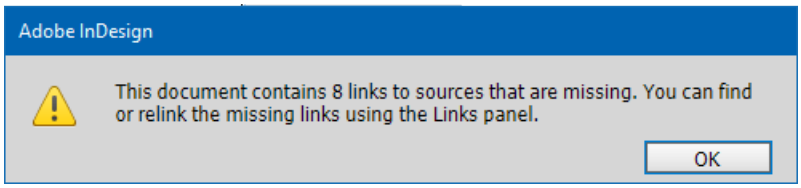
Although the standard InDesign function of relinking assets may be done via the **Links** panel, that method can be cumbersome because it requires users to manually search for or navigate to image locations. If links are broken on hundreds upon hundreds of pages, relinking assets by this method could become an extremely time-consuming task. As such, this method is not recommended.

The STEP functions of **Relink Assets** and **Document-Asset Re-link** automate this task when users are connected to a shared image location.

About Broken Links

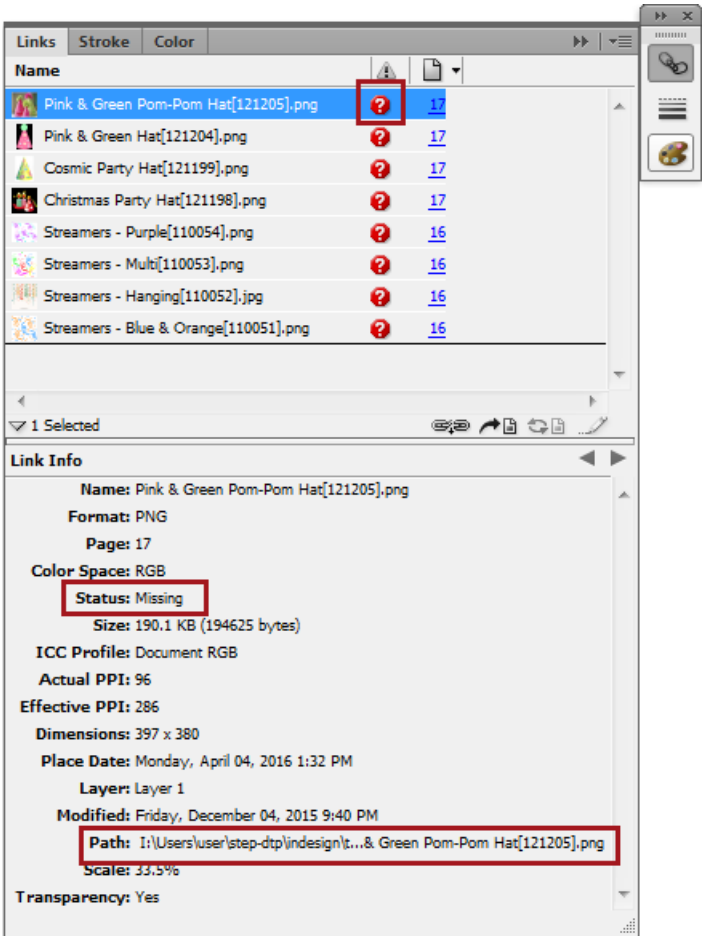
Image links become broken when a document contains images that are no longer linked to the original location of the actual image files. Though images appear on the page, they are only screen-resolution renderings of the original files. Broken links can occur if the original file has been deleted or moved to a different folder or server after it was originally imported into the document. They can also occur if client machines are not connected to the shared image drive in exactly the same manner, or if users change the manner in which the shared drive is connected from one day to the next.

When opening a document in InDesign that contains unlinked images, the following warning dialog displays:



Unlinked images display a red question mark to indicate that InDesign can no longer locate the original image:

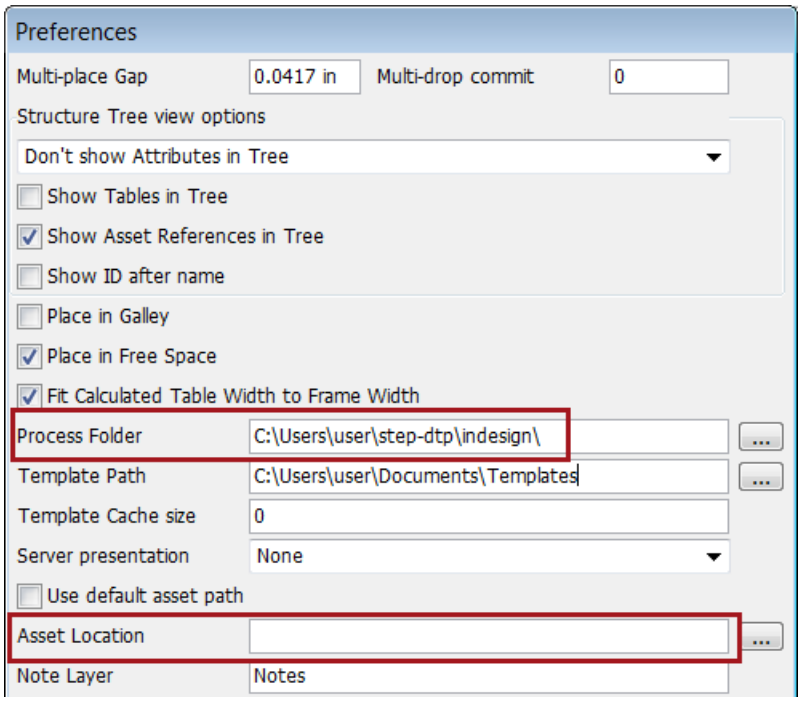
The **Links** panel displays the same red question mark for missing image links and a **Status** of 'Missing.' The displayed **Path** indicates where InDesign is expecting to find the image. This location is where the current user must be connected in order for InDesign to find the image.



Common Causes of Broken Links

Missing Asset Location

One cause of broken links may be if there was no **Asset Location** set in the STEP > **Preferences** menu in InDesign when the pages were originally mounted (this refers to pages generated either manually or by creating a document from a Flatplan). If no asset location is set, images are downloaded directly from STEP into a 'tmp' folder inside the **Process Folder** (designated in the STEP Preferences menu, pictured below). Once the InDesign client is closed, the tmp folder is emptied, causing broken links.

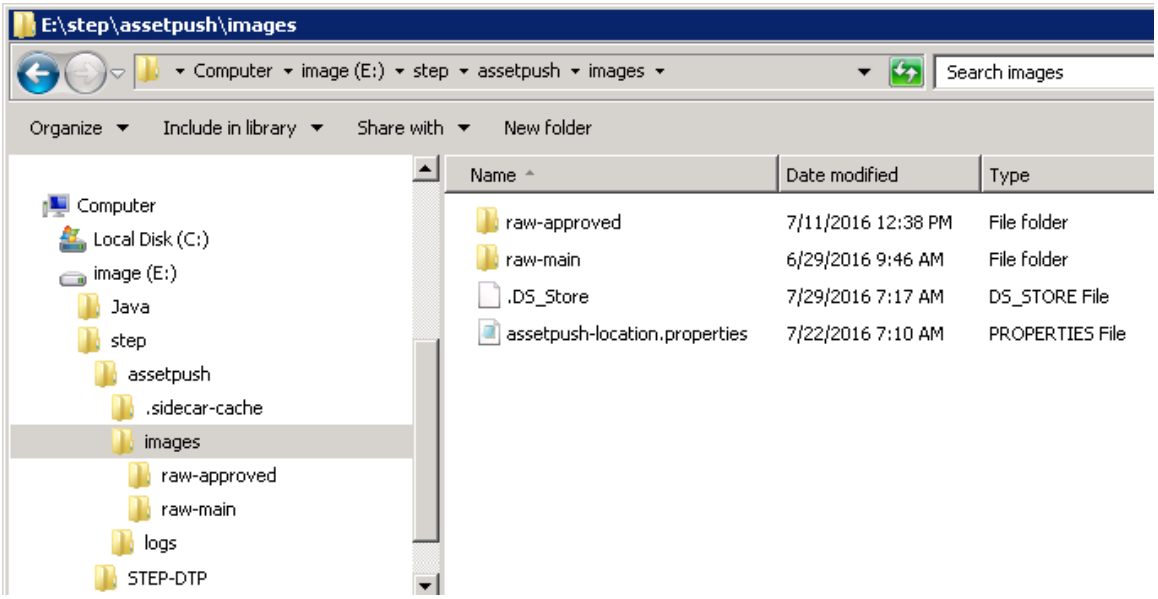


For information on how to determine what file path to place into the Asset Location field, see the **Linking to an Asset Location** documentation.

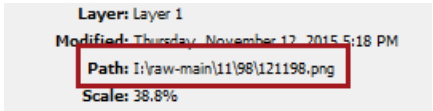
Changes to How the Shared Image Drive is Connected

The most frequent cause of missing images is when the method by which the shared drive is connected to the client or the location of the InDesign server changes.

For example, broken links can be caused if users connect too far up or too far down in the shared image folder structure. In the following screenshot, the correct image location is highlighted (the 'images' folder). A user who connects to, for example, the 'assetpush' folder or the 'raw-approved' folder will experience broken links when opening a mounted page that contains images that are linked to the correct location ('images'), which is being used by the InDesign server.



On Windows machines, the drive letter of the mapped network drive that is used to connect to the asset location can also cause broken links if other users are connecting to the asset location using a different drive letter. In the below screenshots, an Asset Location of 'I:\' is being used. The top screenshot shows how the Asset Location looks in the STEP Preferences menu. The bottom screenshot shows a sample, extended file path using the I drive. If another user is connecting to the asset location using, say, drive A, then their links will be broken when opening documents that use the 'drive I' file paths.



For information on how to connect to an Asset Location, see the **Linking to an Asset Location** topic.

Mixed Windows and Mac Platforms

Another—less frequent—cause of broken image links is when there is a mix of **PC** and **Mac** platforms being used in the STEP Publisher production environment. This mix commonly involves one or both of the following:

- An InDesign server is running on a Windows platform while end users are using Mac InDesign clients
- End users themselves are working on a combination of Mac and PC InDesign clients

Even though end users are accessing images from the same shared location as the InDesign server, the differences between Mac and Windows file path formats cause broken links. For example, when an InDesign document is saved back into STEP from a Mac, InDesign saves the image path in a 'Mac-like' format, as such:

Volumes:images:raw-main:std.lang.all:44:05:4405.tif

When an InDesign document is saved back into STEP from a PC, the same image path is in a 'PC-like' format:

E:\images\raw-main\std.lang.all\44\05\4405.tif

If a Windows user opens a document that was saved back to STEP from a Mac, the images will not be found. Likewise, if a document that was saved back to STEP from a PC (or was created by a Windows InDesign server and saved to STEP) is opened from a Mac, the images will not be found.

A 'standard' installation is when clients and the InDesign server are both on the same platform (either Windows or Mac). In these cases, there is no conflict in Mac versus PC drive and path names.

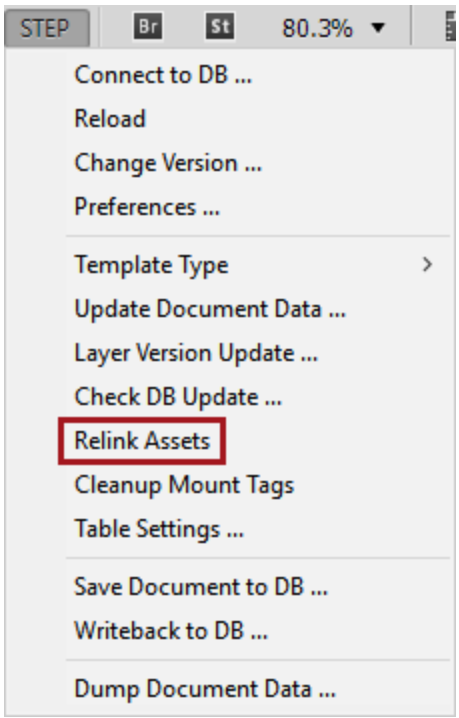
Correcting Broken Links

Relinking Assets from InDesign

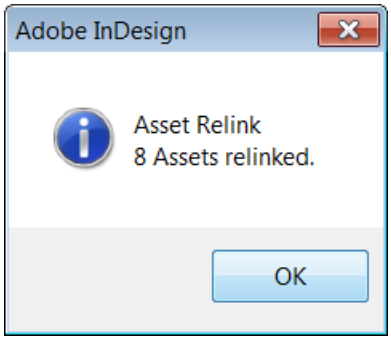
Missing assets can be relinked from within InDesign by using the **Relink Assets** function. (An InDesign server is not required to perform this action.) Provided that the Asset Location is set correctly and connection to the shared drive (asset push images folder) is established, STEP Publisher will be able to locate the images and change the path in the document so the images are no longer 'Missing' and their status in the Links panel reads 'OK.'

To relink assets on a page:

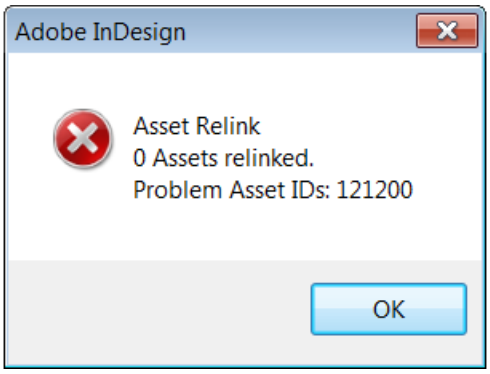
1. In InDesign, open the **STEP** menu and select **Relink Assets**.



2. STEP automatically searches in the specified asset location and matches the IDs of the images in the document to those of the images in the asset location.
3. Once the relink is complete, an Adobe InDesign dialog appears that displays the number of assets that were relinked.



If the relink fails, an error message displays to explain which images could not be relinked. 'Problem Asset IDs' may occur if an incorrect image path is specified in the Asset Location field in the STEP Preferences menu or if there is no connection to the shared image drive.



4. An unbroken link icon now appears on the relinked images, and their status shows as 'OK' in the InDesign Links panel. In addition, the updated file path is now displayed.

Relinking Assets from STEP

A **Document-Asset Re-link** operation is performed from within the STEP Workbench and requires an InDesign server.

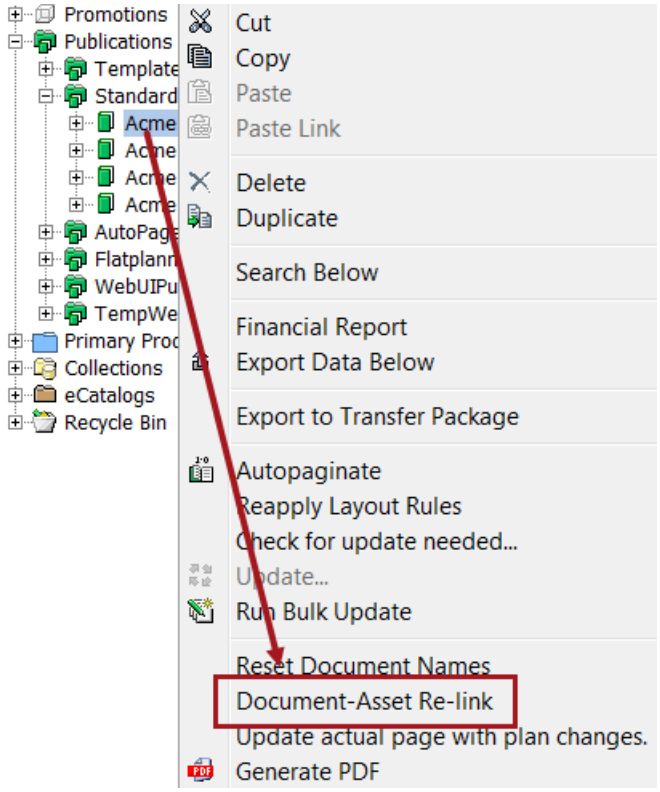
Document Asset Re-link enables a one-click relinking of assets throughout an entire publication or section. As mentioned in previous sections of this topic, image links can break on mounted pages when saved back to STEP from Mac clients but are opened by an InDesign server that is running on a Windows platform. The broken links become problematic when a user needs to perform an action on these document(s) within STEP that requires an InDesign server, such as 'Generate PDF.'

In this scenario, if the saved documents contain Mac-style image paths (which cause broken links for the Windows InDesign server), the Document-Asset Re-link function will correct all the links by locating the images and converting the image paths to Windows-style paths.

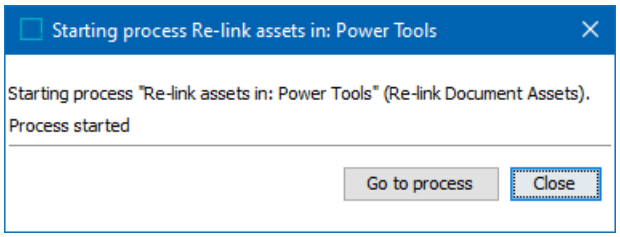
As long as the **dtp-server.properties** file has the AssetPushRoot parameter set correctly and a connection to the shared drive is established, the InDesign server will be able to open the InDesign documents that are in STEP, locate the images, and change the path in the documents so that all images are no longer 'Missing.' The InDesign documents are then saved back. Once completed, the InDesign server will be capable of, for example, generating a PDF that contains high-resolution images using the 'Generate PDF' function.

To relink all assets in a publication or section:

1. In the workbench, navigate to the relevant publication or section, then right-click and select **Document-Asset Re-link**.



2. A background process launches. Click 'Go to process' to monitor the relink progress.



3. If the process is successful, a list of relinked asset IDs appears in the Execution report on the Background Process tab. If unsuccessful, error messages will appear to indicate the problem.

Space Usage in STEP

When an InDesign document is saved back to the database, STEP calculates the space usage for each object mounted on the page. Calculation of space usage is important to merchandisers and catalog coordinators, as it makes it possible to determine if a product, classification, entity, or image has enough space on the page to increase sales. This topic provides an overview of where space usage data can be located in STEP and how STEP calculates space usage on pages.

Space usage can be viewed in the following locations in STEP:

- Under one of the following flippers on the **Page data** tab when viewing DTP documents:
  - Products
  - Classifications
  - Entities
  - Images
- Under the 'Used on Page' flipper on the **Referenced By** tab for product, asset, classification, and entity objects
- On the **Financial Summary** tab and within the **Financial Report** (Flatplanner publications only)

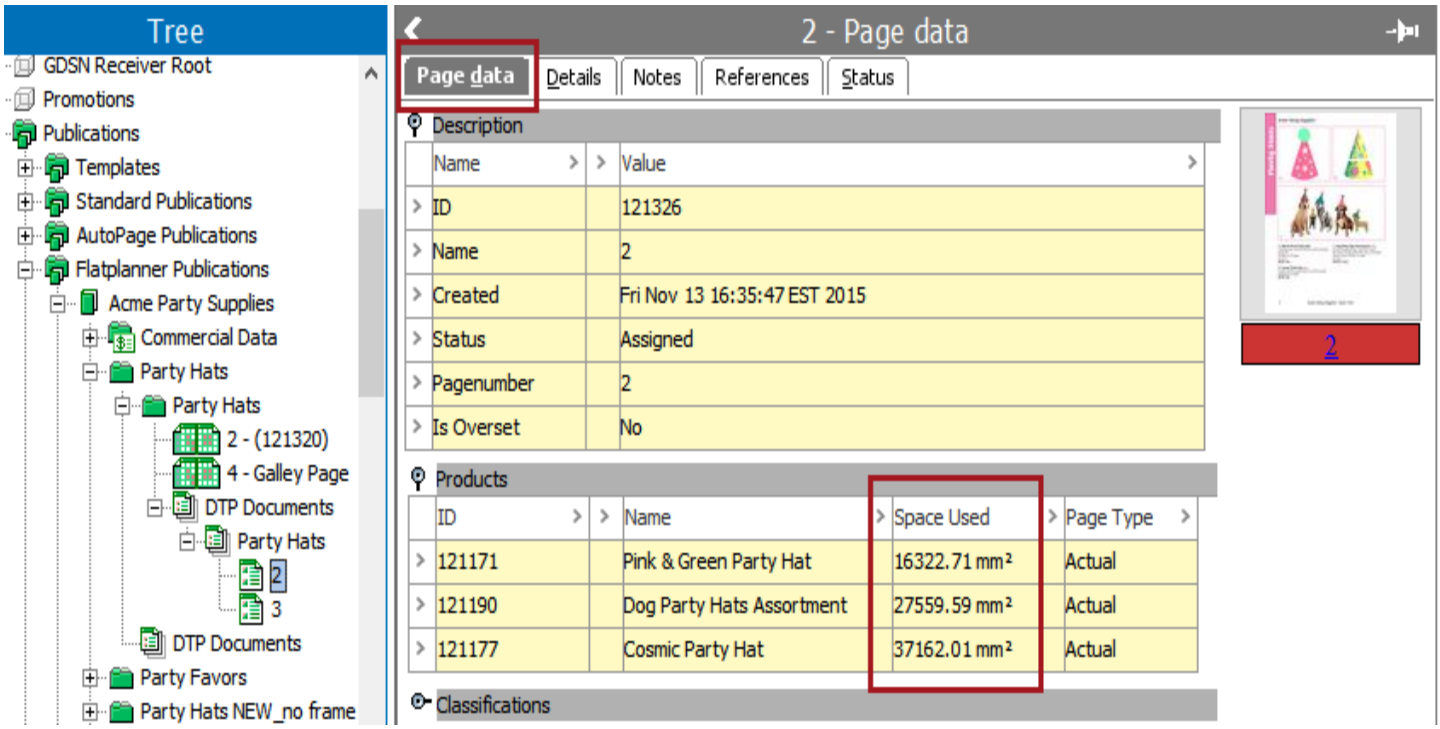
Note: By default, space usage in STEP is calculated in millimeters (mm). To change the measurements to another unit (such as inches), contact your Stibo Systems account manager.

Locations of Space Usage Data in STEP

Page Data Tab

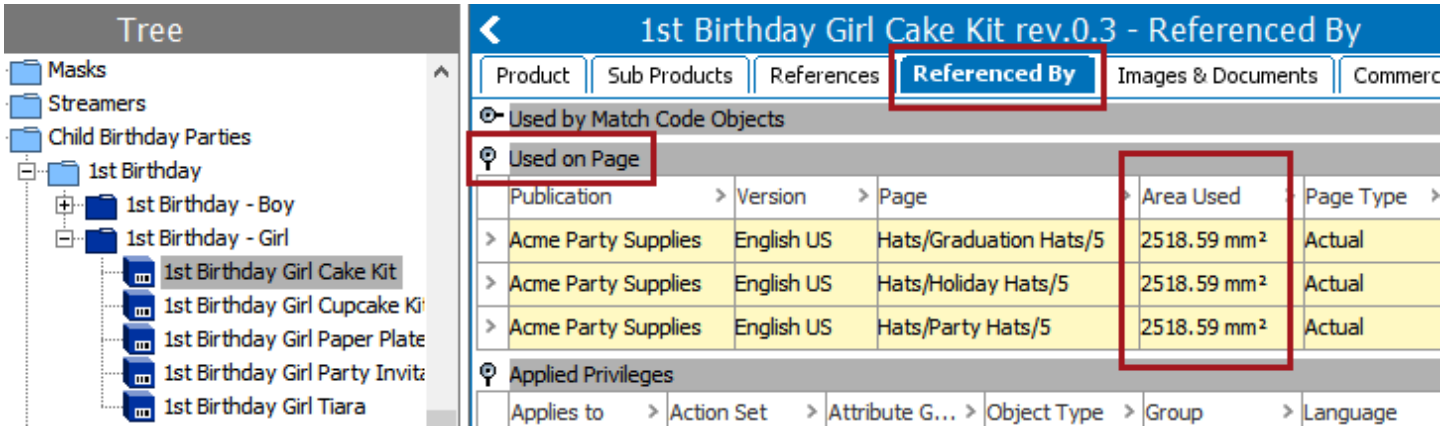
The **Page data** tab contains space usage information about objects mounted on InDesign pages, from a page perspective. In the below example, space usage is displayed for three product objects on a single InDesign page. To view page data:

1. In the Tree, navigate to a publication section that contains mounted pages, then expand the **DTP Documents** node.
2. Expand the InDesign file (in the below example, 'Party Hats'), then click on one of the individual InDesign pages contained within the file.
3. Select the Page data tab (if not automatically directed when selecting the DTP page), then expand the **Products** flipper. Space usage for other mounted objects can be viewed by expanding their corresponding flippers.
4. Space usage is located in the **Space Used** column.



Referenced By Tab

The **Referenced By** tab contains space usage information about objects mounted on InDesign pages, from an object perspective. Space usage data for mounted objects is located under the **Used on Page** flipper. This flipper is available for product, classification, asset, and entity objects. In the below example, the '1st Birthday Girl Cake Kit' product is shown to be mounted on three different InDesign pages stored in STEP. The space usage data is available in the **Area Used** column.



Financial Summary and Financial Report

Space usage for mounted objects in Flatplanner publications can be viewed on the **Financial Summary** tab for publication and section objects and within the **Financial Report** Excel sheet that can be pulled from a publication or section.

For more information, see the **Space Usage in Financial Reports** topic in the **Flatplanner** documentation.

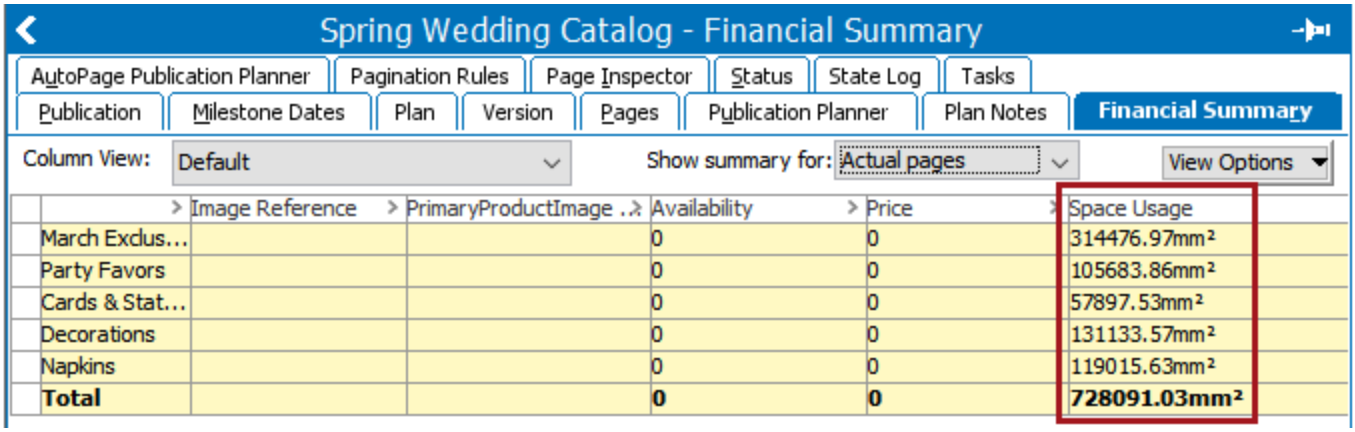
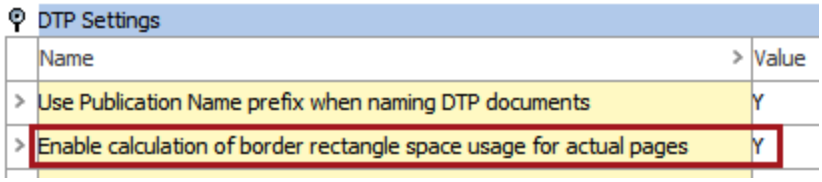


	Image Reference	PrimaryProductImage	Availability	Price	Space Usage
March Exclus...			0	0	314476.97mm²
Party Favors			0	0	105683.86mm²
Cards & Stat...			0	0	57897.53mm²
Decorations			0	0	131133.57mm²
Napkins			0	0	119015.63mm²
Total			**0**	**0**	**728091.03mm²**

How STEP Calculates Space Usage

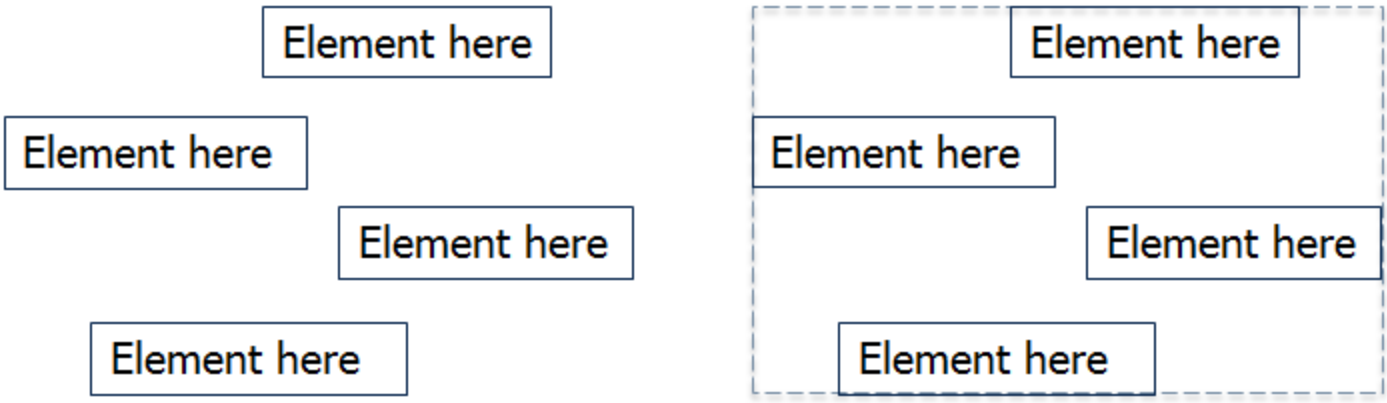
The standard space usage setup calculates the space usage for a product presentation based on the raw data on a page. It does not include the white space of the product presentation in the calculation. For example, if you increase the font size of a product title, the space usage increases. However, if you increase the size of a frame without increasing the size of the content of the space, the space usage does not increase.

Alternatively, you can configure STEP to calculate both the elements of the product presentation as well as the white space surrounding the elements. This is achieved by configuring the 'Enable calculation of border rectangle space usage for actual pages' system setting, which is located under Users & Groups > System Settings > **DTP Settings**.



'Enable calculation of border rectangle space usage for actual pages' tells the system whether to calculate the space that is taken up by each individual mounted element (product, classification, or asset object) on the page, or if the white space surrounding these elements should also be calculated.

When 'Enable calculation of border rectangle space usage for actual pages' is set to **Y**, the system draws an imaginary bounding box (border rectangle) around all of the elements and takes the total area from that bounding box's width and height, including white space.



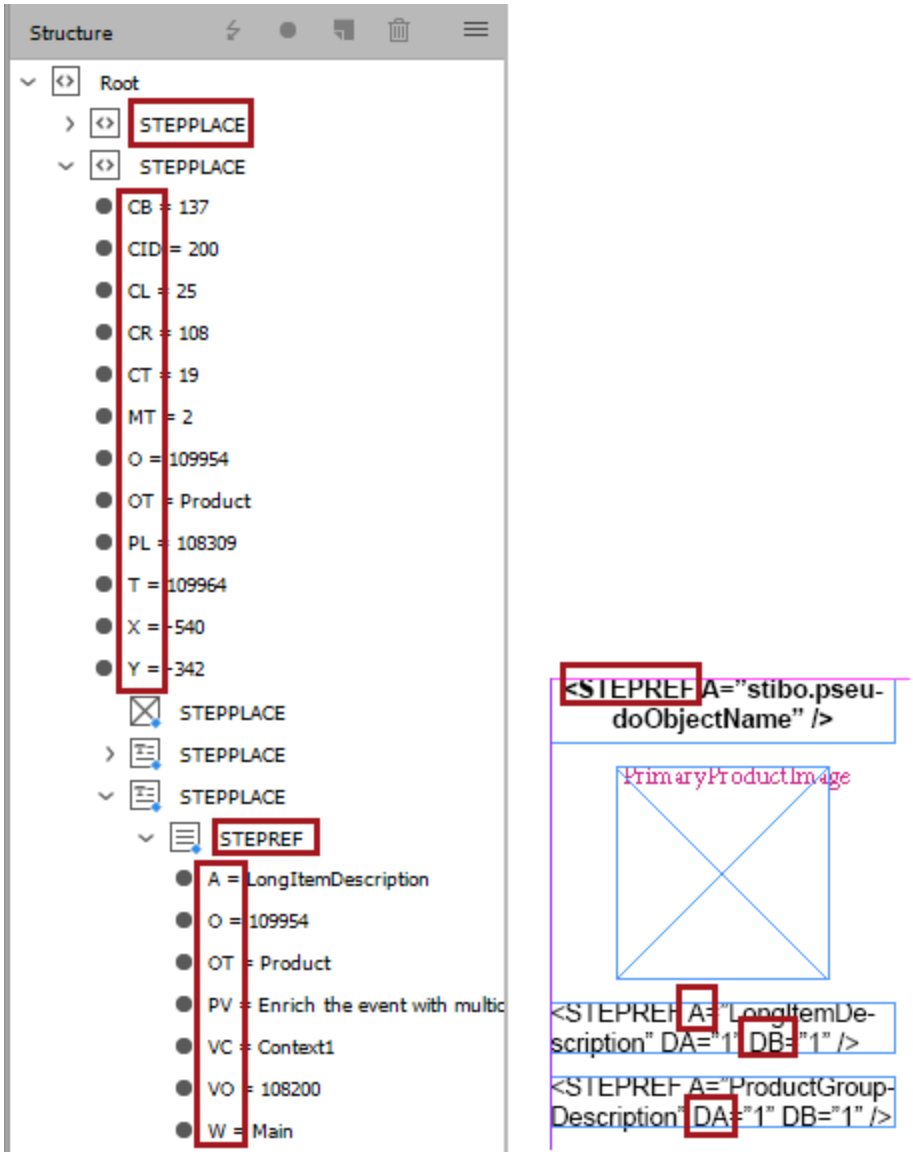
The above example shows the difference between the two methods of measuring space usage. On the left, each of the four elements' individual areas will be used to create the total space usage. On the right, the bounding box is the smallest box that could be drawn to encompass all the individual elements. It is the area of this imaginary box that shows as the space usage.

If 'Enable calculation of border rectangle space usage for actual pages' is set to **N**, the space calculation includes the total area of the individual elements only and does not include white space.

Note: This setting is global for all publications and the decision to set it to Y or N should be made before building a publication. Changing the setting during production could cause space usage to be calculated differently on different pages.

STEP Publisher XML Hierarchy and Attributes

This topic provides a listing of the XML hierarchy elements and XML attributes that appear on product templates and in the XML Structure view on mounted InDesign pages. Common XML elements include STEPPLACE, STEPREF, and STEPTABLE. Common XML attributes include A (Attribute), DB / DA (Delete Before / Delete After), and O (Object ID). The below screenshots show the XML Structure (left) and a sample product template (right).



The following tables contain a full listing of STEP Publisher XML hierarchy elements and XML attributes. For more information on these elements / attributes and for detailed information on the STEP Publisher scripting API, see the **STEP'n'design Scripting API Guide** in the **STEP API** documentation.

XML Hierarchy Elements

Element	Description
STEPPLACE	The STEPPLACE element is created when products are mounted using a template (which includes each cell of a Flatplan mount). The children of the element are the items mounted.
STEPREF	The STEPREF element marks items on the page that correspond to an attribute value in the database. Applied to a range of text or a cell in a table.
STEPTABLE	The STEPTABLE element marks places on the page that correspond to a table in the database. This is normally an InDesign table, but can be a range of text in a text frame if the table is referenced but isn't defined for the object and the reference has delete before/after/fail text applied.
STEPREPEAT	The STEPREPEAT element marks the range of text produced as a result of a repeat setting from the template.
STEPOBJ	The STEPOBJ element marks the range of text produced for each object within a STEPREPEAT element.
STEPCOND	The STEPCOND element marks the range of text (including other STEP tag types) onto which a condition (delete before / delete after / fail text) has been applied.
STEPGROUP	The STEPGROUP element marks the range of text (including STEPAGOBJ tag types) that correspond to an attribute group.
STEPAGOBJ	The STEPAGOBJ element marks the range of text (including STEPREF tag types) that correspond to an attribute within the attribute group.

XML Attribute Descriptions

Attribute	Definition	Description
A	Attribute	The ID of the attribute linked to the element.
AG	Attribute Group	The ID of the attribute group.
AI	Above Inset	The default Above Inset setting for line styles.
AMB	Align Mount Bottom	Whether the mount was aligned to the bottom or not.
AMO	AutoPage Mount Object ID	If the object was mounted using AutoPage then this is the ID of the object.
AMOT	AutoPage Mount Object Type ID	If the object was mounted using AutoPage then this is the ID of the object type.
AMS	Asset Max Scale	The max scale setting for the asset mount. As set through the STEP Template Frame panel.

Attribute	Definition	Description
AR	Attribute Reference ID	If the attribute is an attribute of a reference, this is the reference ID.
AS	Asset Scale	As set through the STEP Template Frame panel.
ASO	Asset Size Option	As set through the STEP Template Frame panel.
BI	Below Inset	The default Below Inset setting for line styles.
C	Context	The ID of the context applied from the database. This is a manually applied 'override' context.
CB	Cell Bottom	The bottom coordinate of the cell (to the nearest mm) on the plan for which the product was mounted.
CELLORIGINS	Cell Origins	Contains the STEPPAGEDATA detailing the cell origins of a cell in a table.
CID	Cell ID	The ID of the cell on the plan for which the product was mounted.
CL	Cell Left	The left coordinate of the cell (to the nearest mm) on the plan for which the product was mounted.
COL	Color	The Color attribute for line styles.
CR	Cell Right	The right coordinate of the cell (to the nearest mm) on the plan for which the product was mounted.
CSBO	Can Split Between Objects	As set through the STEP Template Frame panel.
CSF	Can Split Text Frame	As set through the STEP Template Frame panel.
CT	Cell Top	The top coordinate of the cell (to the nearest mm) on the plan for which the product was mounted.
Ct	Color Tint	The Color Tint setting for line styles.
D	Delete No Content	Indicates that the frame from a template should be deleted if it has no resolved STEP content when mounted (as set through the STEP Template Content panel).
DA	Delete After	The (integer) number of characters to delete after element if no database content is found.
DB	Delete Before	The (integer) number of characters to delete before element if no database content is found.
DELT	Deleted Text	When an attribute reference has been hidden from the user as a result of a delete before/after condition with no resolved content, the text deleted from the page is recorded in the Deleted Text attribute.
DS	Data Source	The data source as set through the STEP Template Frame panel.
DV	Drop Version	The list of versions applied when objects are dragged onto the document from the structure view.
DL	Data Level	Records the set of information the user last requested to be saved to STEP from the document (1 = Product Template, 2 = Page information, 3 = Document and Page information, 4 = Page Template, 5 = Author

Attribute	Definition	Description
		Template, and 6 = Master Document).
ELS	Even Line Style	The style name to apply to even lines in a repeat area.
FH	Fit Height to Content	As set through the STEP Template Frame panel.
FID	Frame ID	As set through the STEP Template Frame panel.
FO	Frame Order	As set through the STEP Template Frame panel.
FT	Frame Type	As set through the STEP Template Frame panel: 1 = Static, 2 = Galley Text, 3 = Key Letter, 4 = Image, 5 = Module, 6 = Text, and 7 = Object.
GA	Group Align	As set through the STEP Template Frame panel.
GAP	Gap	As set through the STEP Template Frame panel, the gap between template section items.
Gc	Gap Color	The Gap Color settings for line styles.
Gt	Gap Tint	The Gap Tint settings for line styles.
IA	Image Alignment	As set through the STEP Template Frame panel. Valid values are 0 = Left Align, 1 = Centre Align, and 2 = Right Align.
IL	Is Locked	Whether the item is locked or not. Not used.
KWN	Keep With Next	As set through the STEP Template Frame panel.
L1S	Line One Style	The style name to apply to the first line of a repeat area.
LI	Left Inset	The default left Inset setting for line styles.
LLES	Last Line Even Style	The style name to apply to the last line of a repeat area if the last line is an even line.
LLOS	Last Line Odd Style	The style name to apply to the last line of a repeat area if the last line is an odd line.
LS	Line Styles	An XML formatted string with the line styles defined in the document. The XML format is the "IN" element defined in STEPDOCDATA.
LT	Line Type	The Line Type setting for line styles.
MAA	Multi Asset Across	As set through the STEP Template Frame panel.
MAX	Max Distance	As set through the STEP Template Frame panel, the maximum distance for a template section before starting another row / column.

Attribute	Definition	Description
MC	Master Version Context	The context assigned to the version.
MO	Master Version ID	The version ID linked to the frame.
MT	Mount Type	Linked to the T attribute, shows the type of item recorded in the T attribute (1 = Template name, 2 = template database object id, 3 = layout database object id).
NA	Name	The Name setting for line styles.
NF	Source Node Filter	The data filter as specified on the STEP Template Frame panel.
NID	Note ID	Record of the database ID applicable to a Note frame.
NS	Nth in Section	For AutoPage items, this is the nth object within the publication section.
Nth	Nth	For objects with multiple asset references of a type, which of the 'n' applies to this frame.
O	Object ID	The ID of the object linked to the element.
OLS	Odd Line Style	The style name to apply to odd lines in a repeat area.
OT	Object Type ID	The ID of the object type linked to the element.
OW	Override Workspace	The ID of the workspace that should be used instead of the version workspace.
PL	Plan Object ID	The object ID of the plan from which the object was mounted.
PN	Commercial Term (Price) nth Value	Allows selection of which particular term from multiple in a commercial list for the object that is used; 1 is the first, 2 second, etc.
PO	Parent Object	The ID of the parent object in the database for documents that have been saved to STEP.
POT	Parent Object Type	The object type of the parent object in the database for documents that have been saved to STEP.
PS	Plugin State	Stores the plugin state for a table mounted using the table mount plugin.
PV	Placed Value	A record of the database value placed by the element. Used during update, etc., to check if the database value has changed.
RA	Require All	As set through the right-click option to 'Apply Condition to Selection' for text inside of text frames.
RI	Right Inset	The default Right Inset setting for line styles.
RO	Reference Object	The object ID targeted by the asset reference type from the object.

Attribute	Definition	Description
ROT	Reference Object Type	The object type ID targeted by the asset reference type from the object.
RS	Repeat Separator	The string to use when separating multiple values (either a repeat area or a multi-value attribute).
RT	CELLREF Reference Type	The reference type in a cell. Values are 0 (Unspecified type), 1 (Attribute Value), 2 (Asset Reference), 3 (Node Reference), 4 (Commercial Data).
RTL	Right to Left	Specifies whether the data should be mounted right to left instead of the default left to right.
RV	Reference Object Revision	The revision targeted by the asset reference type from the object.
S	Section ID	For AutoPage items, the publication section that this mount is part of.
SI	Section Index	Records the next section index to be assigned to template sections when mounting from a template that uses them.
SID	Section ID	Record of which template section this frame applies to.
SR	Source Reference	The ID of the reference type applied to the element (i.e., for the applied 'object', locate the target of its 'source reference' and resolve its 'attribute').
T	Mount Template / Layout	The object ID or template name that was used to generate the frames, etc., that make up the mounted product presentation.
Tah	Template Max Height	Specifies the Max Height of the Product Template.
Taw	Template Max Width	Specifies the Max Width of the Product Template.
TF	Fail Text	The string to use if no database content is found (overrides delete before/after).
TFM	Transformation	As set through the STEP Template Content panel.
Tih	Template Min Height	Specifies the Min Height of the Product Template.
Tiw	Template Min Width	Specifies the Min Width of the Product Template.
TN	Transformation Name	The transformation applied to the attribute.
TO	Target Object	For attributes of references, the target object ID of the object that is being referenced.
TOT	Target Object	For attributes of references, the target object type of the object that is being referenced.

Attribute	Definition	Description
	Type	
TP	Commercial Term (Price) Property	Allows selection of which particular commercial term property.
TT	Table Type	The ID of the table.
V	Version ID	The ID of the master version mounted on this document.
VC	Version Context	The ID of the context applied to the version in the database.
VM	Value Mode	The value mode of the attribute.
VO	Version Object	The ID of the version object applied from the database.
W	Workspace ID	The ID of the workspace applied from the database.
WT	Weight	The Weight setting for line styles.
X	X Coordinate	The X coordinate that the item was mounted at.
Xd	X Delta	The distance from the left margin of the template to the left-most frame on the template when the product was mounted.
Y	Y Coordinate	The Y coordinate that the item was mounted at.
Yd	Y Delta	The distance from the top margin of the template to the top-most frame on the template when the product was mounted.

InDesign Queues

Multiple InDesign queues may be created in STEP in order to sequence and prioritize jobs that are sent from STEP to an InDesign server, such as autopagination and proof view requests. InDesign queues allow jobs to be queued in the STEP server instead of within the InDesign server, allowing more control and prioritization of job requests. Such prioritization can ensure that foreground tasks (smaller tasks that do not use a background process, such as product proof views and Flatplanner page previews) are handled before background tasks (larger tasks that use background processes, such as autopagination) so users do not have to wait for a large job to finish before starting another.

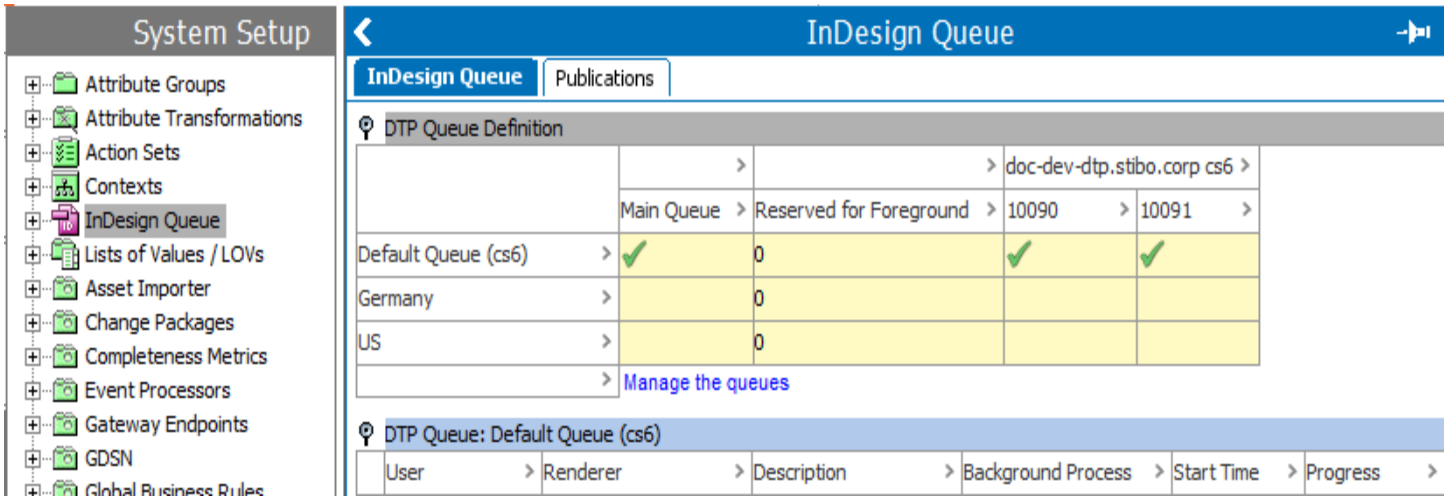
Note: InDesign queues are not relevant unless your STEP system is linked to at least one InDesign server sidecar. For more information on deploying an InDesign server sidecar, contact Stibo Systems.

Use cases for needing different InDesign queues include:

1. Your creative department may be international. In this case, users in one country will use one queue, and users in another country will use a different queue. Users in each country will then have their own set of InDesign server resources and will not be 'delayed' if users in the other country are sending large jobs to the InDesign server (such as the autopagination of a publication with hundreds of pages).
2. Your creative department may have a temporary need to run multiple versions of InDesign. In this case, for example, you would use one queue for InDesign CS6 and another for InDesign CC. By allocating a publication to the CS6 queue, you will ensure that all of its documents use CS6, which will help control the ability to transition from one version to another.

Setting up the InDesign Queue

InDesign queues in STEP are created under System Setup > **InDesign Queue**.



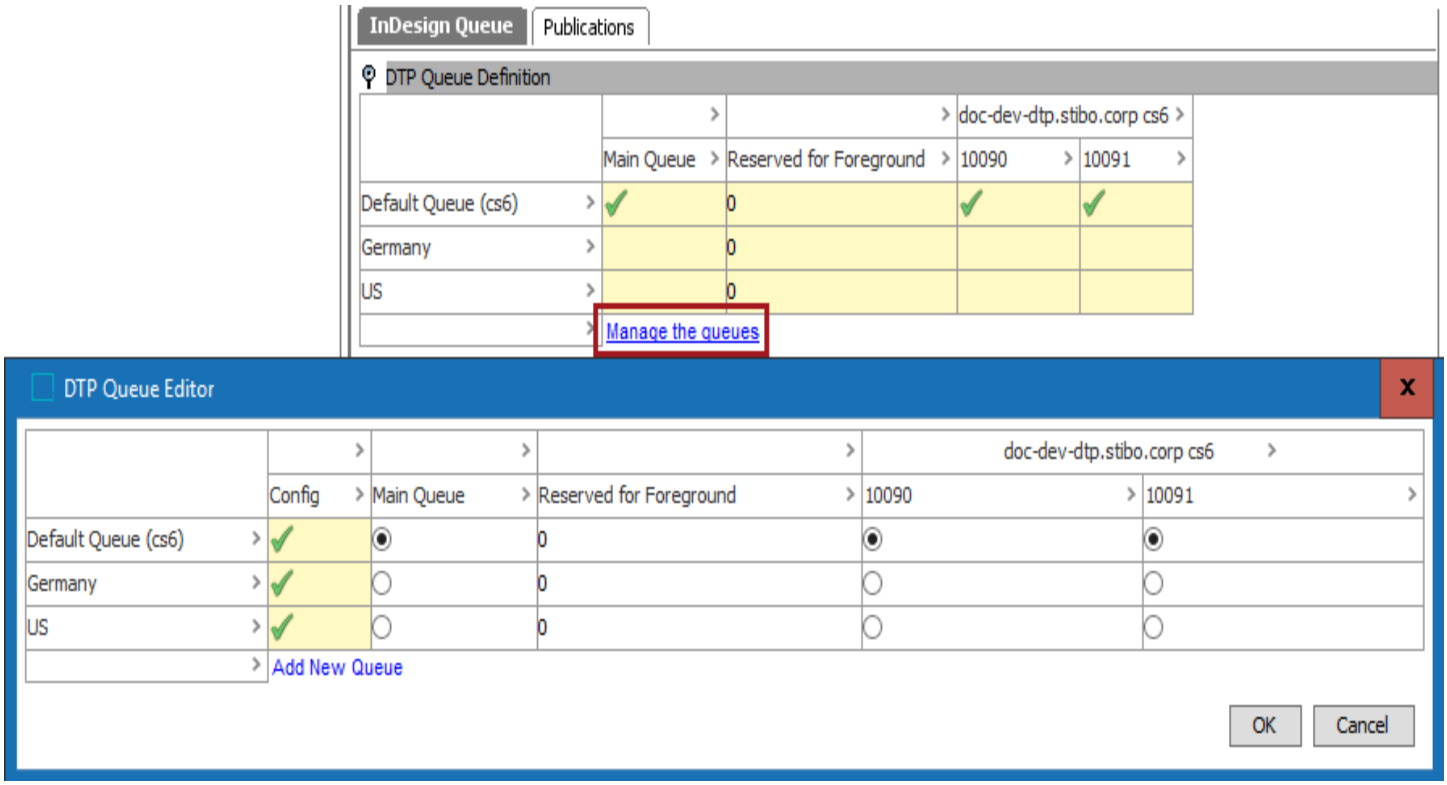
In the above screenshot, the last two columns display the InDesign server renderers that are running, the port numbers to which they are connected (for example, 10090), and the version of InDesign they are running (for example, CS6).

Queues designated as 'default' (for example, Default Queue (CS6)) are created automatically for any InDesign server renderers that are not assigned to a user-defined queue. A system-generated 'default' queue, however, is not necessarily the 'main' queue. The main queue is used when a specific queue has not been assigned to the publication from which you are generating pages. Any queue can be selected as the main queue, depending on your business needs. There is no limit to the number of InDesign queues that can be created.

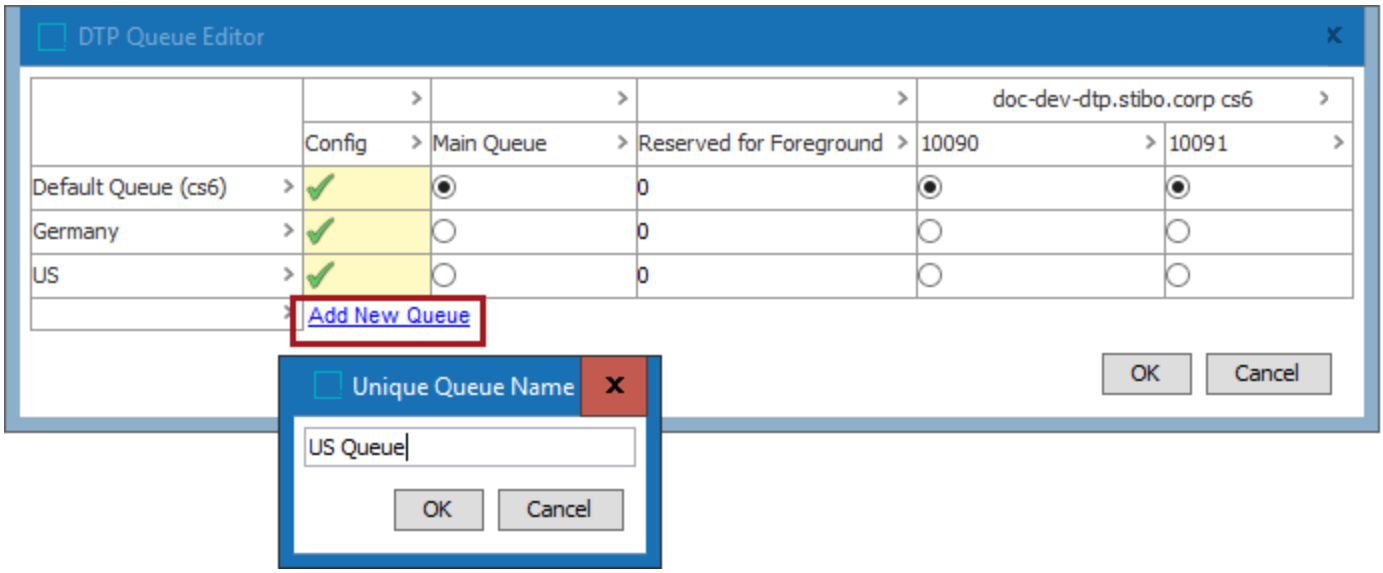
Note: The initial connection of InDesign servers to your STEP system must be performed by Stibo Systems. However, once the servers are connected, end users may create InDesign queues to prioritize the order in which pagination and proof view jobs are sent to these servers.

To create a new InDesign queue, follow these steps:

1. On the System Setup tab, navigate to **InDesign Queue**.
2. On the InDesign Queue tab, expand DTP Queue Definition, then click 'Manage the queues' to display the **DTP Queue Editor**.

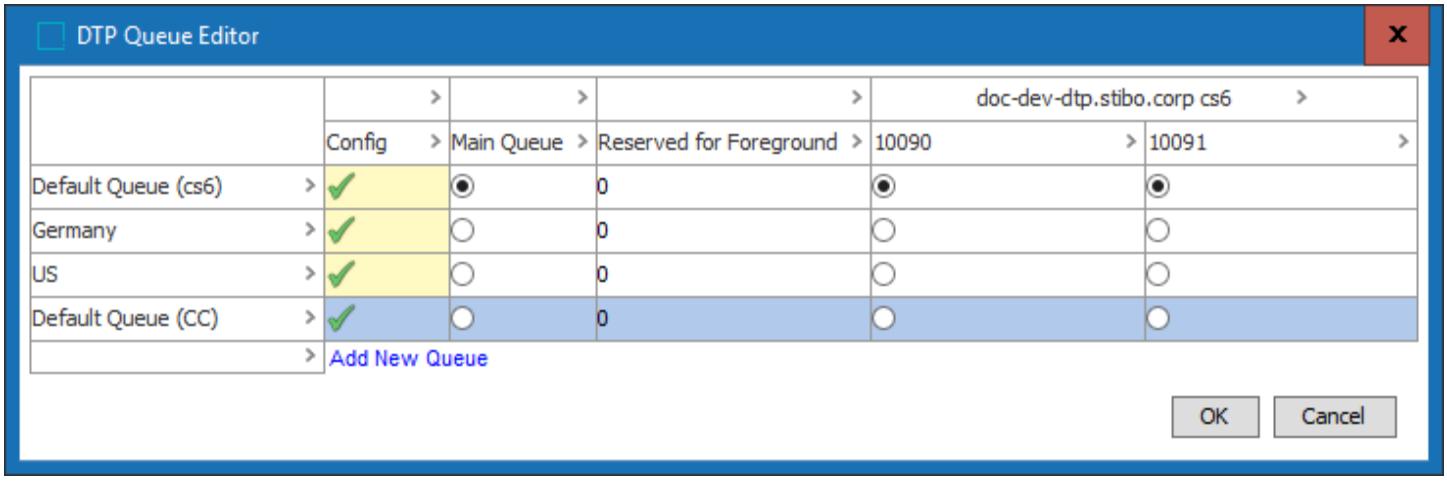


3. In the DTP Queue Editor dialog, click 'Add New Queue.'
4. In the Unique Queue Name dialog, enter a name for the queue, then click **OK**.

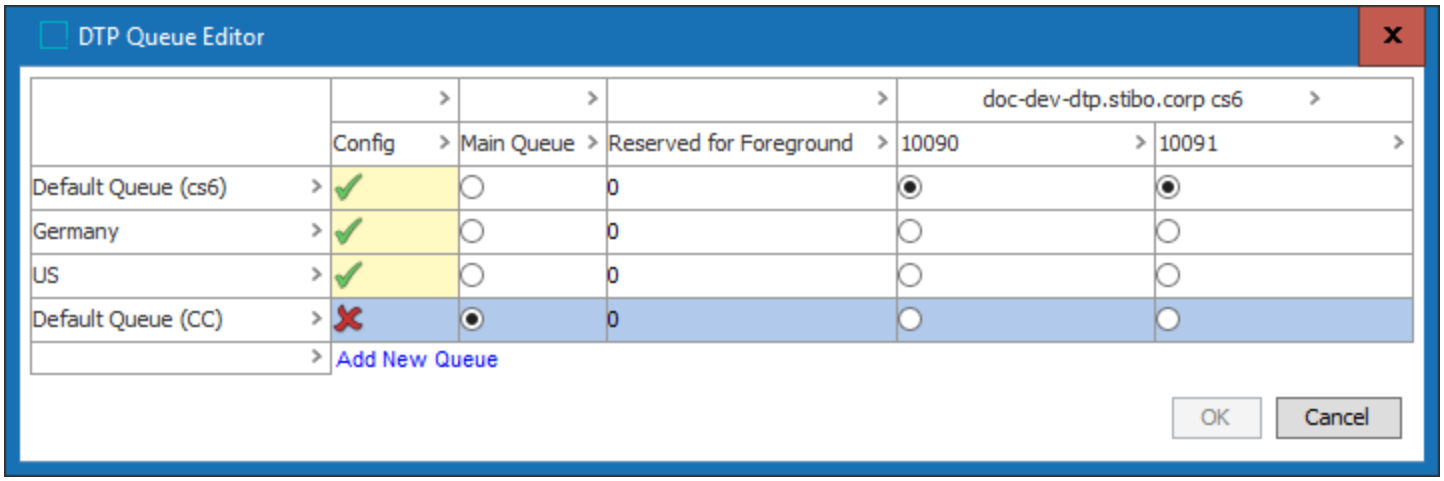


5. In the **Reserved for Foreground** column, enter a number to designate the number or renderers that should be reserved for foreground tasks, which are smaller tasks that do not use a background process (for example, product proof views and Flatplanner page previews). For a server with two renderers, for example, the number 1 would be entered to ensure that one of the two renderers is always reserved for foreground tasks. (Note that a queue cannot consist solely of foreground renderers.)

   By default, all new queues are set to 0. Leaving a value of 0 means that a foreground task may have to wait until a renderer has finished processing a background task before the foreground task can complete. (If a background and foreground task are both waiting for a free renderer, the foreground task always get the first free one. However, *not* reserving a renderer for foreground tasks means that the possibility exists for all renderers to be busy with background tasks, causing a wait for a foreground task.)



6. To designate a queue as the 'main' queue, select the radio button under **Main Queue** for that queue. When designating a queue as main, at least one server renderer must be assigned to it. Not assigning at least one server renderer will result in a configuration error and the changes cannot be saved, as illustrated by the red 'X' displayed in the Config column in the following screenshot.



7. Click **OK** to complete the queue setup.

Queue Operation

Prioritization

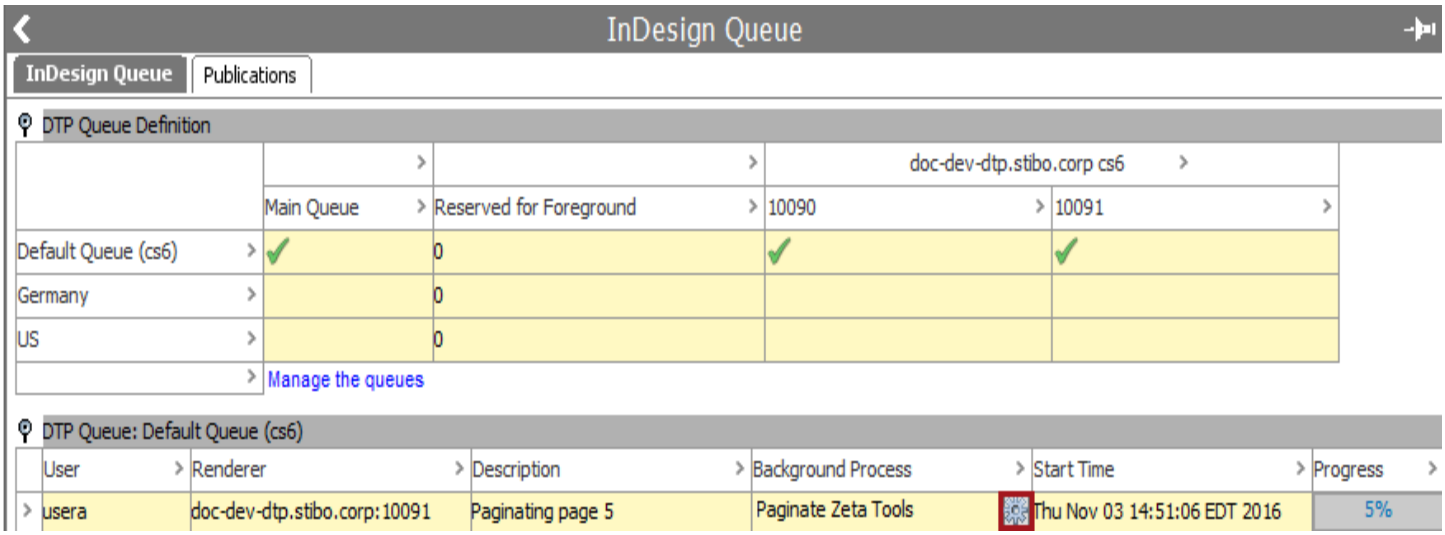
Foreground tasks are given higher priority over background tasks—otherwise the oldest task has higher priority.

Parallel Processing

Some background jobs are able to run in parallel—for example, generating a PDF of a large publication section can retrieve multiple documents in parallel and stitch them into a single PDF as each document is returned.

Queue Status

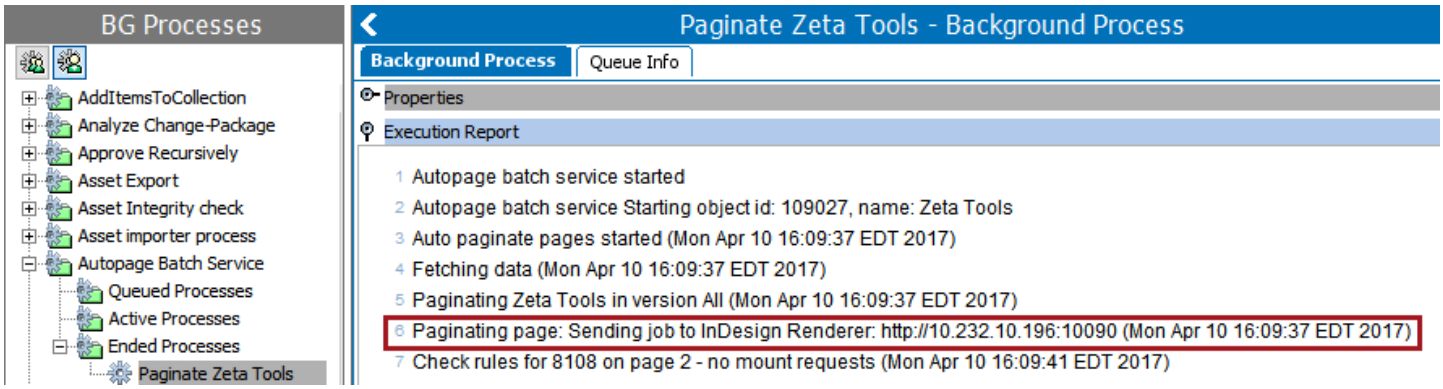
When requests are sent to the queues, the InDesign Queue screen displays the jobs in progress for each queue. The following screenshot shows an autopagination task that is being handled by the 'Default Queue (cs6)' queue. To view the associated background process as the task is in progress, click on the Background Process button.



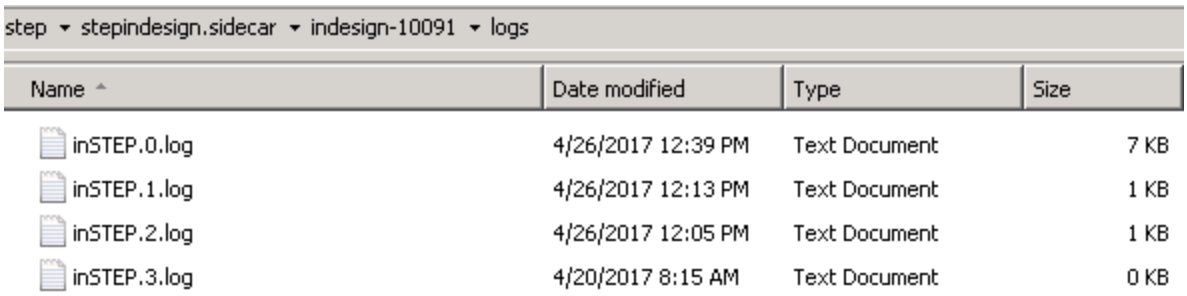
InDesign Renderer Background Processes and Logging

Background processes for jobs sent to the InDesign server appear in the **Autopage Batch Service** queues on the BGProcesses tab. The Execution Report for these processes displays the IP address of the InDesign server and the port number of the renderer that is processing the job.

For more information on background processes, see the **Background Processes and Queues** section of the **System Setup** / **Super User Guide** documentation.

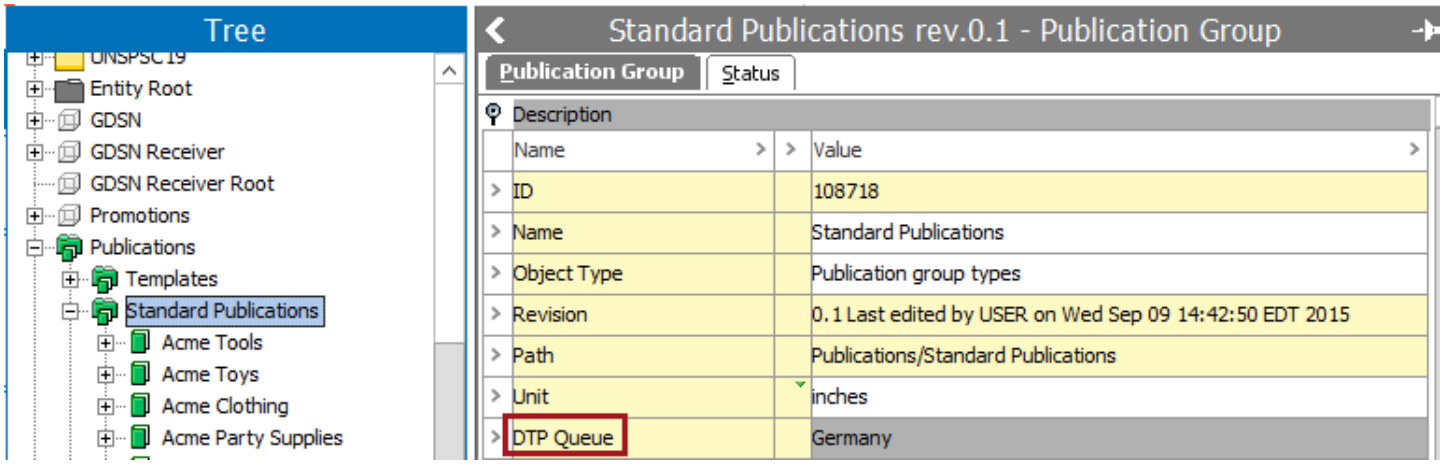


Each time a job is sent to an InDesign renderer, log files are generated and stored on the InDesign server in a 'logs' folder for that renderer. The below screenshot shows a standard 'logs' location on a Windows-based InDesign server (for example, E:\step\stepindesign.sidecar\indesign-10091\logs). However, you do not need to log in to the IDS to view and/or download these logs, as they are easily accessed from the IDS Logging tab in the Admin Portal. For more information, see the **IDS Logging** topic in the **Administration Portal** documentation.

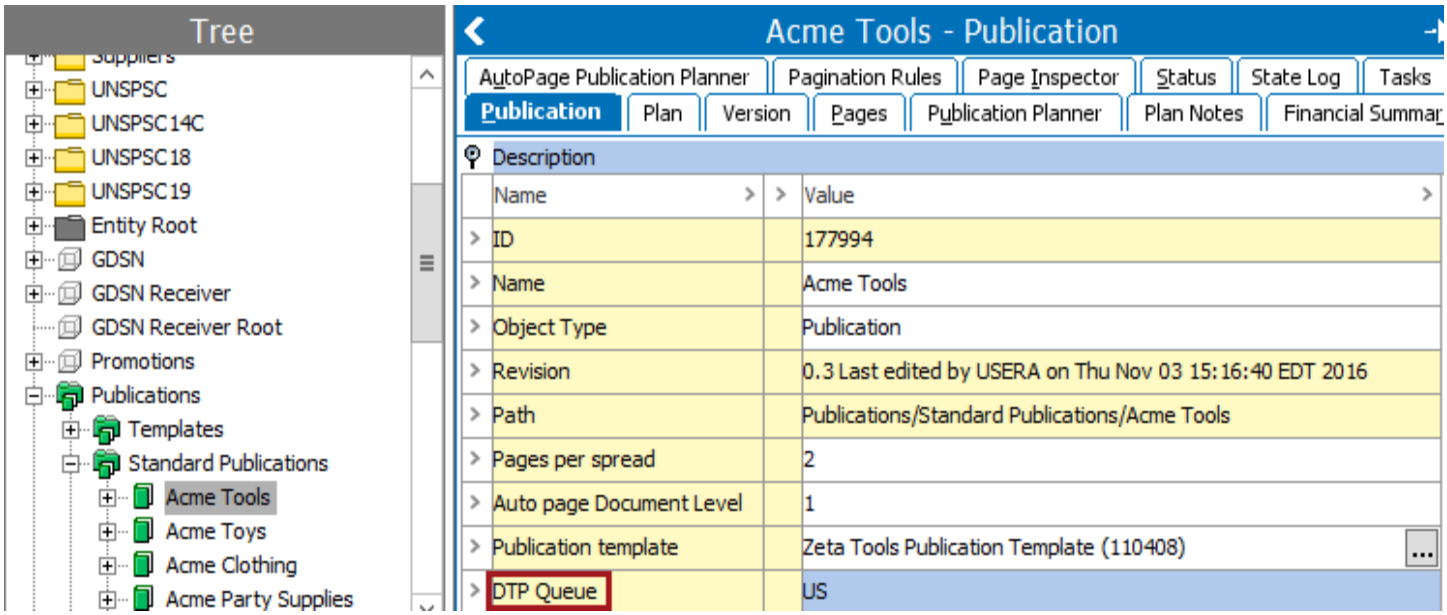


Assigning Queues to Publications

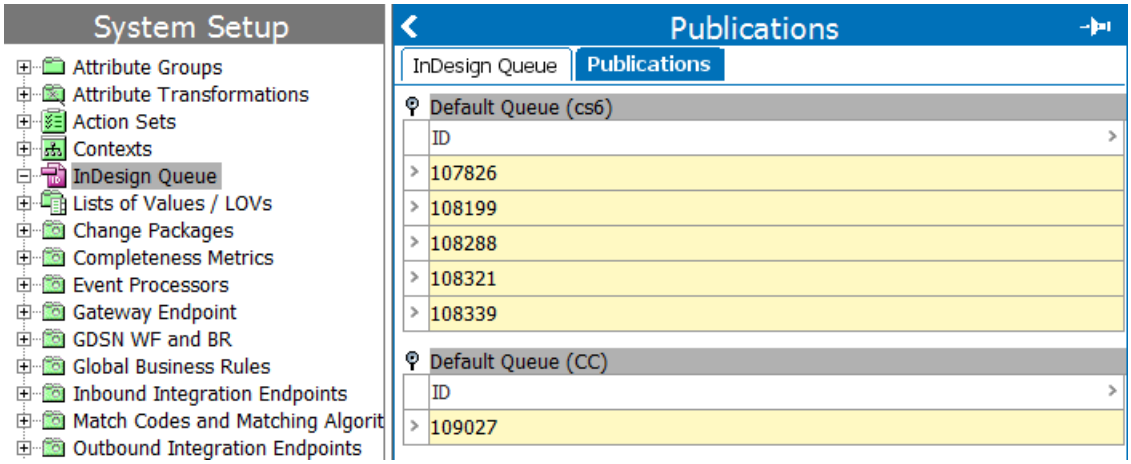
Publications and publication groups can be set to use a particular queue via the **DTP Queue** list, which, for publications is located on the **Publication** tab and for publication groups is located on the **Publication Group** tab. If only one queue exists, or if no queue is specified on the publication or publication group, the queue designated as the **Main Queue** in the DTP Queue Editor will be used.



Queues set at the publication group level will inherit to all publications inside the group. This selection can be overridden at the individual publication level by selecting a different DTP queue for the publication, or by selecting no queue at all, in which case the main queue will be used for that publication.



The publications assigned to each queue are displayed on the **Publications** tab in the InDesign Queue editor:



Configuring InDesign Server Instances

InDesign server instances are controlled via the sidecar, which uses the following information from the sharedconfig.properties file on the STEP application server. (Note that these settings are typically configured by Stibo Systems technical support rather than super users or system administrators.)

1. Space-separated list of hosts running InDesign servers. **Example:** InDesign.Instances=ids_host1 ids_host2
2. The number of instances (renderers) to create on each host. **Example:** InDesign.Renderers=3
3. The version of the InDesign server. **Example:** InDesign.Version=cc13
4. The port number for the first instance. **Example:** InDesign.Port=12222

5. Overrides of the above settings for individual sidecars (not pictured below). **Examples:** InDesign. ids_ host2.Port=9090; InDesign. ids_host2.Version=cs12

The following screenshot shows a sample configuration for a Windows- based InDesign server instance:

```
#=========================================#
# DTP server sidecars
#=========================================#
InDesign.Renderers = 2
InDesign.Instances = doc-dev-dtp.stibo.corp
#InDesign.Instances = 10.64.205.155
#InDesign.Instances = 10.232.10.196
InDesign.Version = cc13
```

AutoPage

This documentation section / user guide contains information about the AutoPage component and how it is used in connection with Adobe InDesign and STEP to create autopaginated publications. With autopagination, a selection of objects (most commonly products and assets) can be placed onto one or even hundreds of Adobe InDesign pages in a single-mount operation, requiring minimal or no manual interference.

Once an initial publication has been created, AutoPage can update these auto-generated InDesign pages with just a few clicks. For publications like catalogs and sales flyers, which need to be republished each year or season, AutoPage can save time on pagination tasks that would otherwise be performed manually, such as the updating of content, images, and pricing information. Additionally, product presentations can be easily reordered and repositioned, and pages for an entire publication can be resequenced in one operation. When autopagination is complete, AutoPage can transform the InDesign pages into printer-ready, high-resolution PDFs.

Note: Though objects other than product objects can be mounted onto InDesign pages from STEP, including classification folders, entities, and green publication hierarchy objects themselves, the subtopics in this documentation will frequently refer to InDesign page layouts as 'product presentations' and objects to be mounted as 'products'. This is to streamline the language used in presenting this information.

AutoPage Component Requirements

To use AutoPage, the following components are required in addition to STEP:

- STEP Publisher
- STEP AutoPage

Other components may be required for specific features.

Third-Party Software Requirements

- Adobe InDesign Server (IDS) software, which executes the autopagination process.
- Adobe InDesign client software, for individual users. The client version of the software *must* match the server version.

Note: Supported versions of Adobe InDesign are CC 2022 (CC17), CC 2021 (CC16), CC 2020 (CC15), and CC 2019 (CC14).

A subscription to the Adobe Creative Cloud service is required for both client and server platforms. Adobe InDesign CS6 is not supported in STEP 8.3 and above.

The Adobe InDesign server is only supported by Windows and Mac platforms. As such, additional hardware may be required in addition to the STEP application server.

Additional Prerequisites

STEP Knowledge

To use AutoPage, the following is recommended:

- Basic knowledge of STEP. See the **Getting Started / User Guide** documentation for more information.
- An understanding of STEP Publisher (STEP'n'design). For more information, see the **STEP Publisher** documentation.

Fonts

All required fonts for a production must be placed onto the InDesign Server that STEP is connected to as well as on users' local client PCs or Macs. If possible, use Open Type fonts (OTF), which are both PC and Mac compatible.

InDesign Plugin

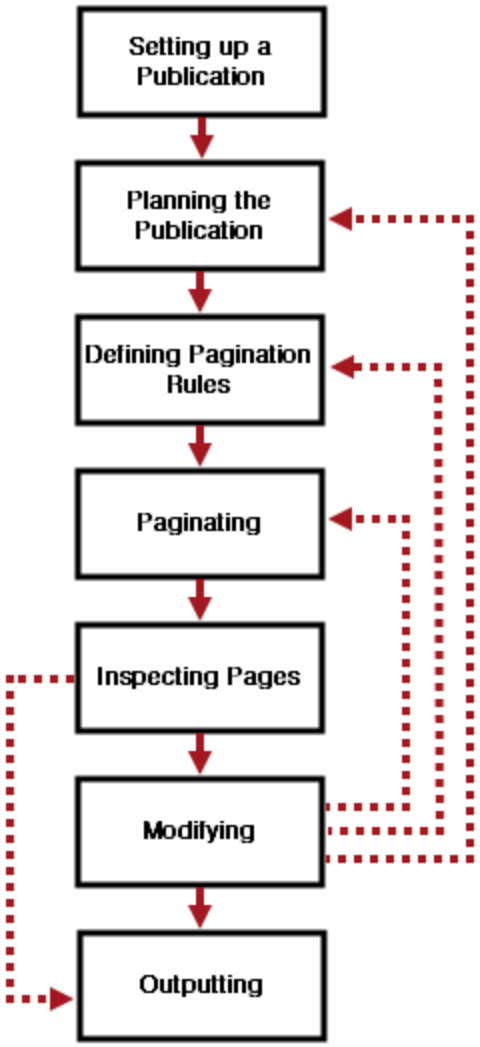
Both the InDesign Server (IDS) and any local client installations of Adobe InDesign must have the correct Adobe InDesign plugin installed. For client installations, this is downloaded from the Start Page of your STEP system. See the **Installing STEP Publisher** section of the **STEP Publisher** documentation for more information.

Asset Push

Since the majority of publications will utilize images, **asset push** must be configured, and the asset push sidecar must be set up and running. For more information, see the **Asset Push** section of the **Digital Assets** documentation.

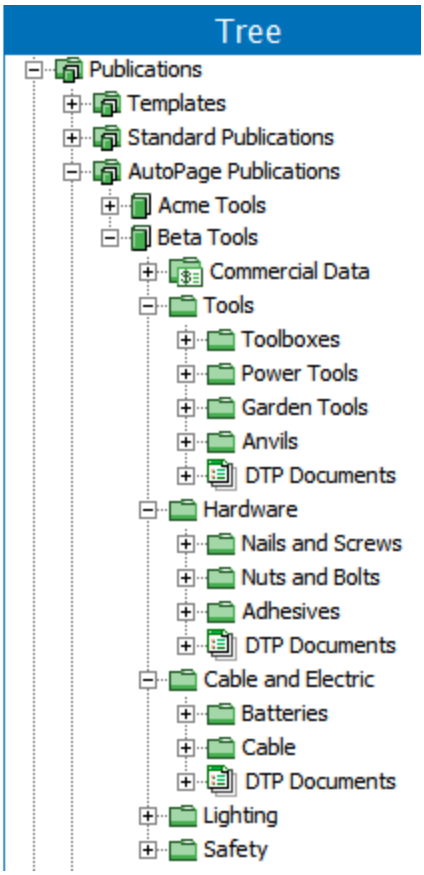
Creating a Publication in AutoPage

This topic describes how to begin the process of creating a publication in the STEP Workbench using AutoPage. The following chart is a high-level overview of the steps involved in autopagination.



Setting up a Publication

First, a publication structure must be created that defines the versions, sections, subsections, and other elements of the publication. Alternatively, you can create a new publication by duplicating an existing one. For more information, see **Creating a Publication in STEP Workbench** and **Duplicating a Publication** in the Publication Hierarchy section of the **STEP Publisher** documentation.



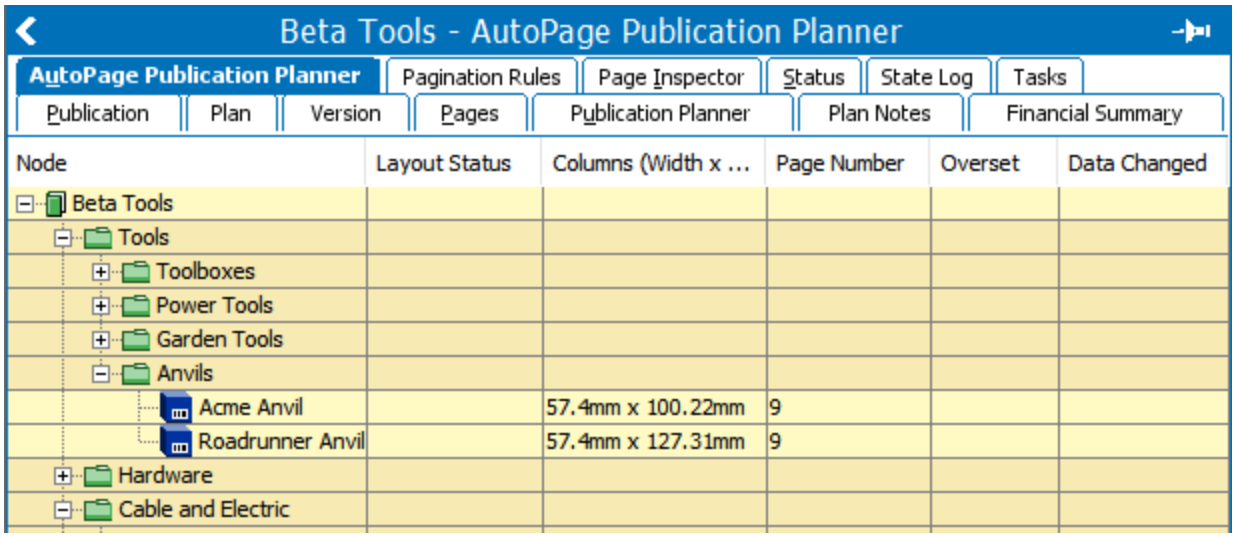
Additionally, you must create a publication template and one or more product templates in InDesign, then save them to STEP. You then apply the publication template and product templates to the relevant publication.

For more detailed information about the creation and configuration of publication and product templates, see the **Publication Templates** and **Product Templates** sections of the **STEP Publisher** documentation.

Planning the Publication

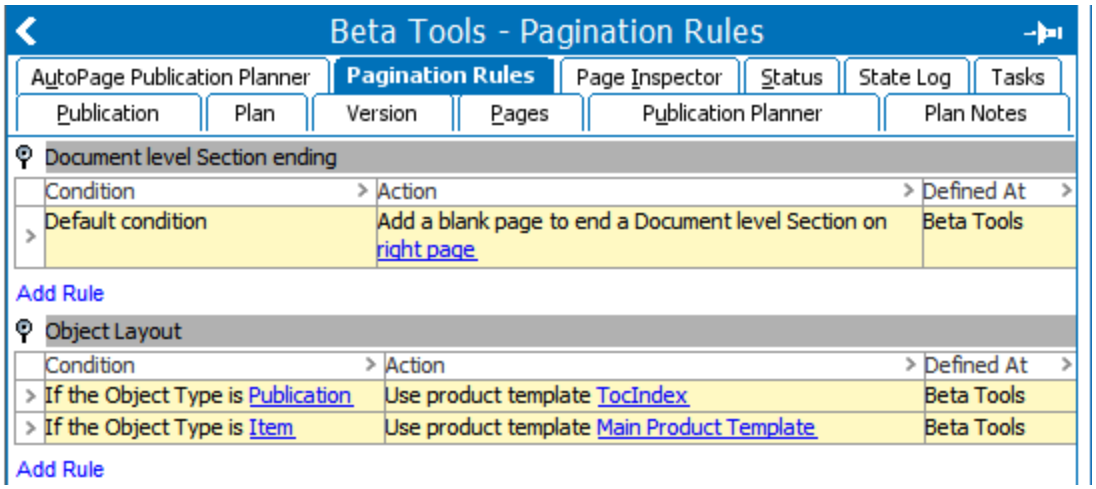
After creating the publication structure and templates for the publication, the next step is to define which products, assets, entities, and/or classifications should be included in the publication, as well as specify where they belong in the publication structure. You can manually link these objects into sections and subsections, or you can link them through an Excel or STEPXML import.

Products, assets, entities, and classifications are linked to the sections or subsections in the sequence that they should be paginated. For more information, see the topics under the **Planning and Organizing an AutoPage Publication** section.



Defining Pagination Rules

Pagination rules control how, when, and where product presentations are added to a page. Many pagination rules define which spread of the publication template applies at a point (e.g., by section), and which product template to use when mounting objects onto pages. For more information, see the **AutoPage Pagination Rules** topic.



Paginating Publications

Once the publication hierarchy has been created, the templates and objects have been linked, and the pagination rules are in place, the publication and/or sections and subsections can be paginated.

The pagination is started through a pagination request which, via a background process, makes a call to the connected InDesign server. The InDesign server then performs the pagination based on the applied publication template and pagination rules. When done, the InDesign server saves the paginated pages back to STEP. These pages are automatically saved under the DTP Documents tree nodes at the designated section level (which is defined on the publication in the 'Auto page Document Level' setting).

For more information, see the **Autopaginating Pages** topic.

Inspecting Pages

To verify that the pages look the way they should, a preview of the actual pages can be viewed and inspected in the STEP Workbench using the **Page Inspector**. For more information, see the **Inspecting and Editing Pages** topic.

Modifying Pages

If necessary, you can modify the sequence of objects, manually reposition objects, remount objects, reflow pages, set a different vertical justification, check if an update is needed, and set new page numbers. For more information about modifying pages, see the **Inspecting and Editing Pages** topic.

Updating Pages

Pages can be updated with new data from STEP by starting an update process. The update is started through an update request which, via an update background process, calls the InDesign server. The InDesign server then does the actual page update. When done, the InDesign server saves a new version of the paginated pages to STEP.

For more information, see the **Updating Documents in AutoPage** topic.

Setting Page Numbers

After updating, the page numbers can be reset to ensure consecutive numbering of sections. An example:

Section 1: pages 1 - 10

Section 2: pages 11 - 20

Section 3: pages 21 - 30

A request is sent to the InDesign server to update the page numbers of the actual pages in the section. The InDesign server then saves new versions of the documents to STEP.

For more information, see the **Controlling Page Numbers** topic.

Outputting Pages to PDF

When the pages are ready to go to the printer, they can be exported to high-resolution PDFs from the workbench by making a call to the connected InDesign server. For more information, see the **Generating PDFs in AutoPage** topic.

AutoPage Interface

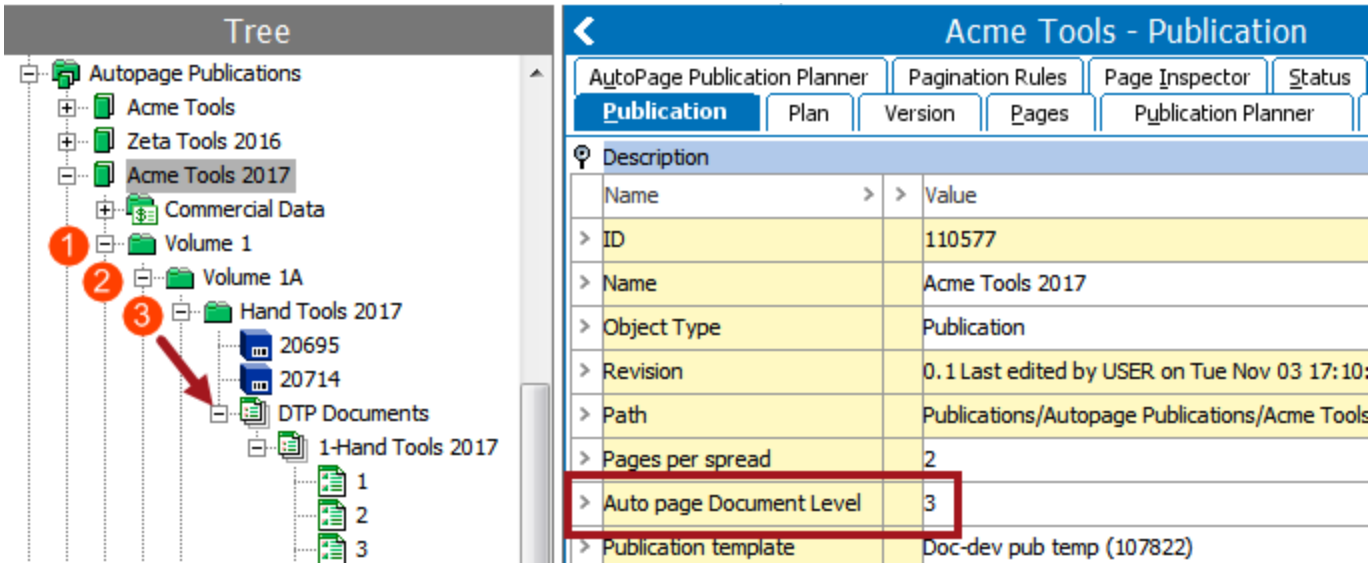
The AutoPage interface consists of four main tabs in the STEP Workbench :

- Publication
- AutoPage Publication Planner
- Pagination Rules
- Page Inspector

Publication Tab

AutoPage Document Level

AutoPage publications include an **Auto page Document Level** setting. This setting determines the section or subsection level at which InDesign documents (actual pages, also known as DTP Documents) are stored. The below screenshot shows the location of an InDesign document stored in a publication with an AutoPage Document Level setting of 3. For more information, see the **Autopaginating Pages** topic.

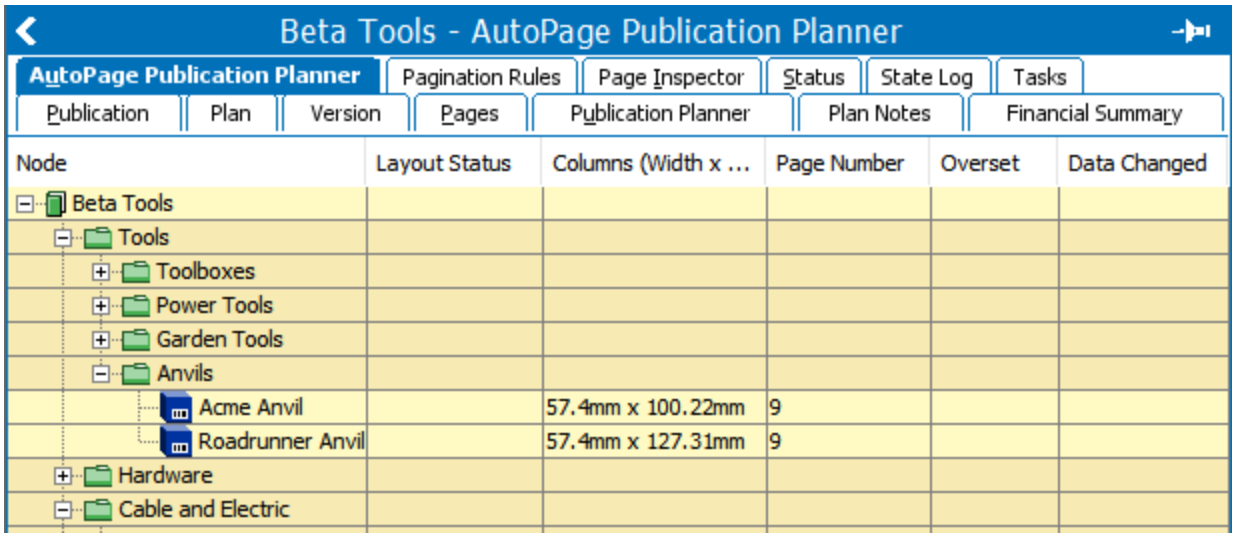


Additional Publication Options

Additional publication-specific options that apply to AutoPage publications are also available on the Publication tab, including 'Publication template' and 'DTP Queue.' For more information, see **Creating a Publication** in the **Getting Started** / **User Guide** documentation. For information on DTP Queues, see the **InDesign Queues** section of the **STEP Publisher** documentation.

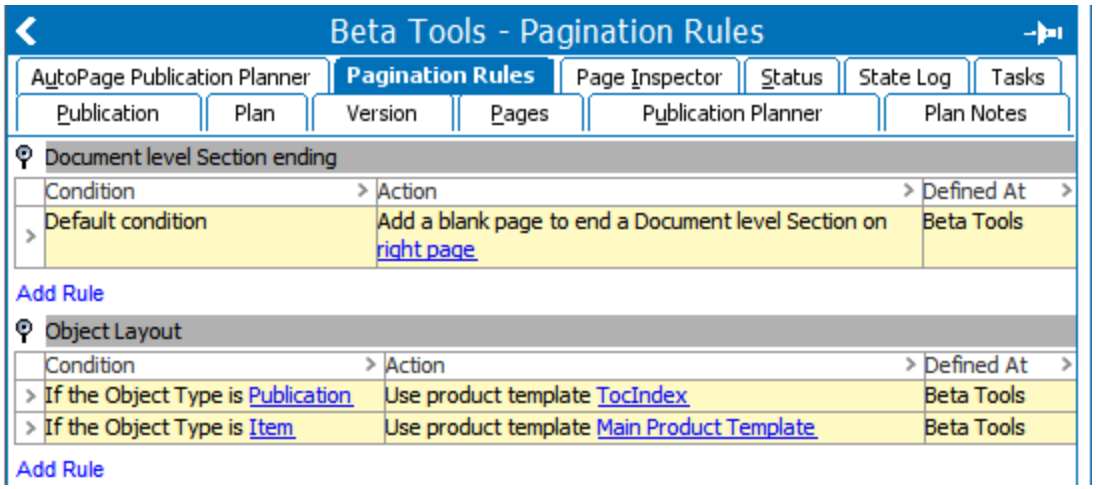
AutoPage Publication Planner Tab

Use the AutoPage Publication Planner to plan page content and view the status of paginated pages. For full details, see the **AutoPage Publication Planner** topic.



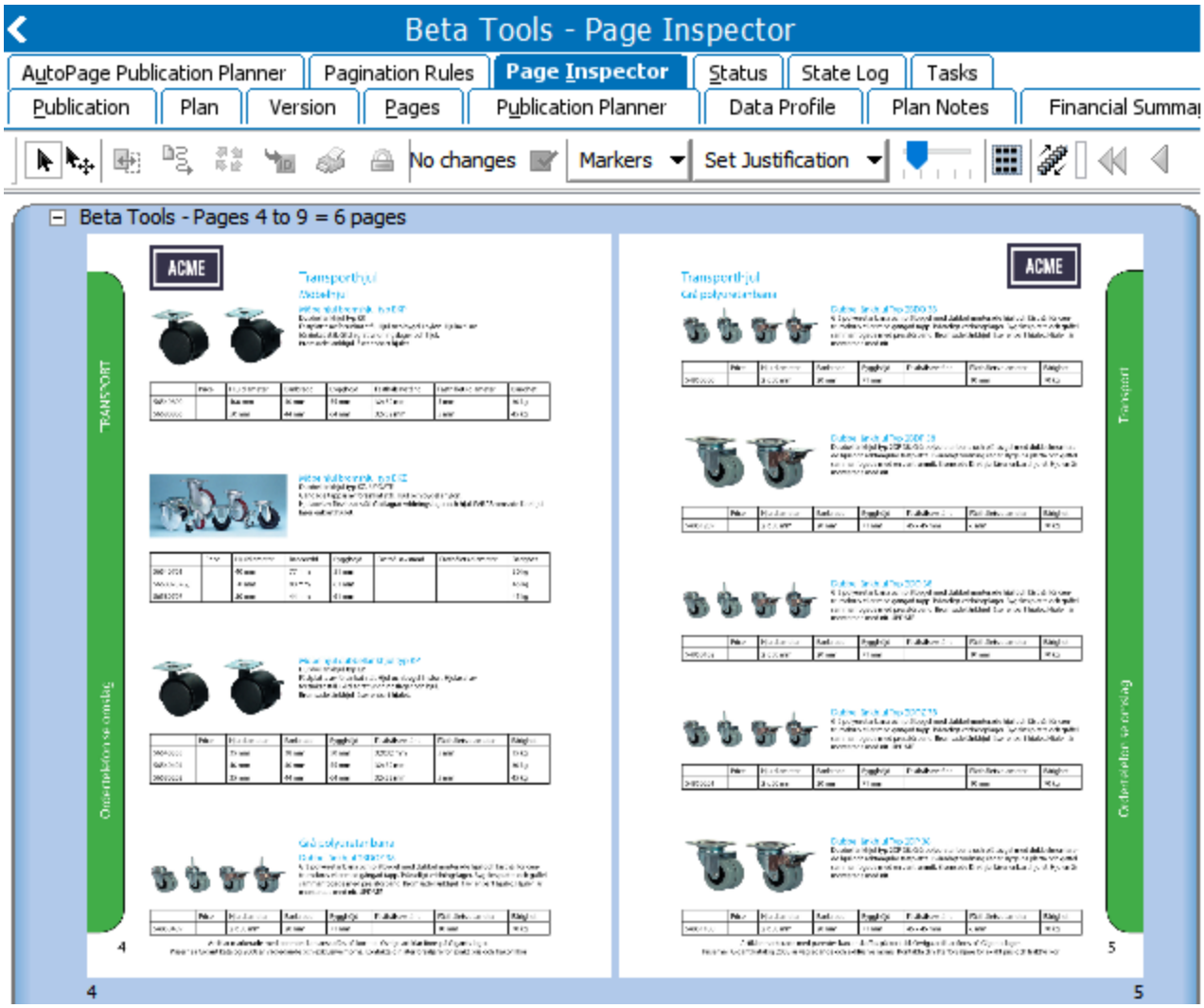
Pagination Rules Tab

Use the Pagination Rules tab to define and gain an overview of all pagination rules. All pagination rule **conditions** and **actions** are displayed, including the location in the publication structure where the rules are defined. For more information, see the **AutoPage Pagination Rules** topic.



Page Inspector Tab

Use the Page Inspector to view the paginated pages, their page numbers, and the objects mounted on them. For more information, see the **Page Inspector** topic.


Beta Tools - Page Inspector
AutoPage Publication Planner
Pagination Rules
Page Inspector
Status
State Log
Tasks
Publication
Plan
Version
Pages
Publication Planner
Data Profile
Plan Notes
Financial Summa
No changes
Markers
Set Justification
Beta Tools - Pages 4 to 9 = 6 pages
ACME
TRANSPORT
Transport
4
5

Planning and Organizing an AutoPage Publication

Though much of the initial planning for the organization and product selection of an AutoPage publication may happen outside of STEP, the order of the objects that will appear in the publication, as well as the order of the publication sections themselves, is set within the STEP Workbench. This organization takes place within the **Tree** and the **AutoPage Publication Planner**.

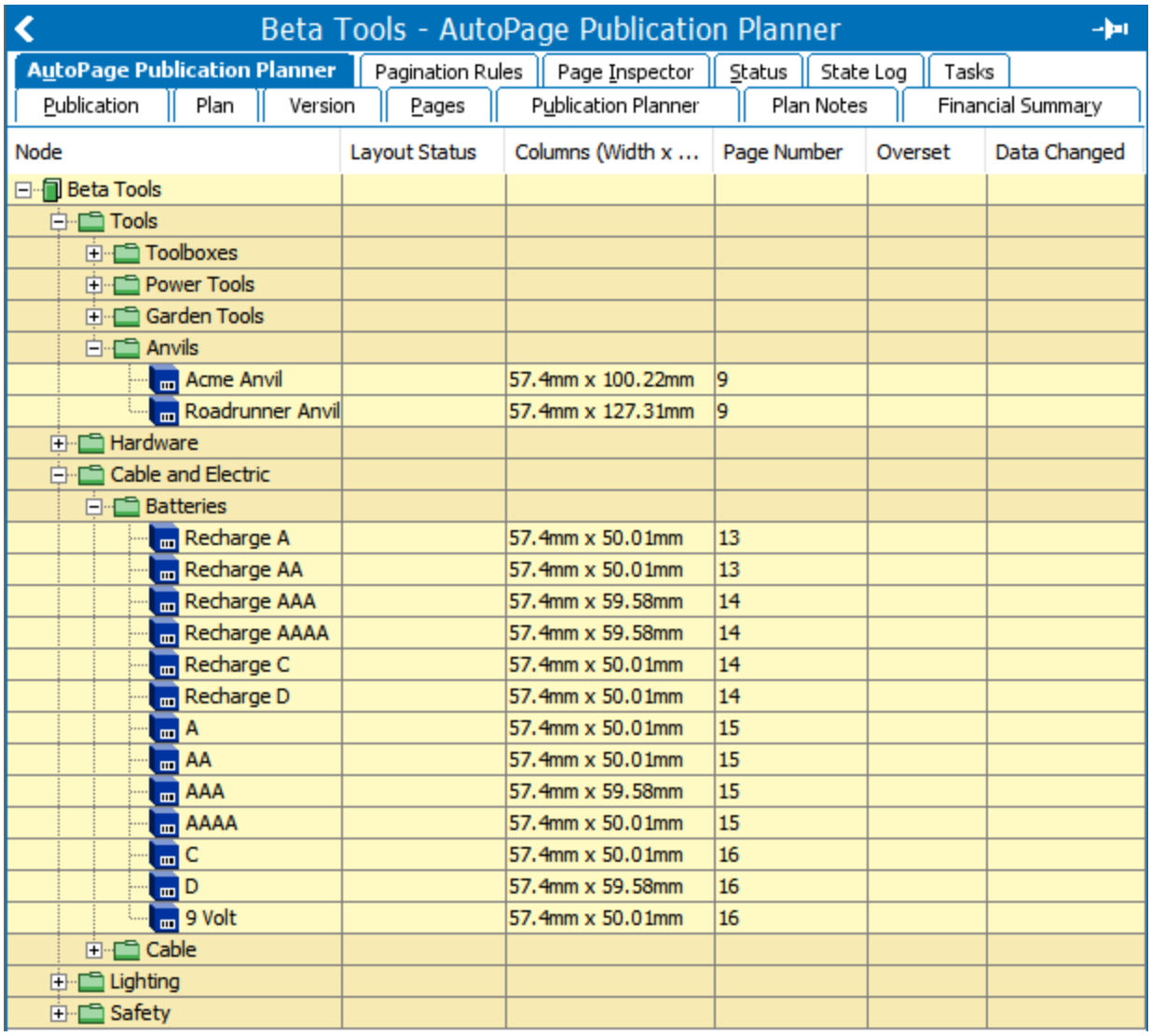
This documentation section contains the following topics:

- AutoPage Publication Planner
- Organizing AutoPage Publication Sections
- Linking and Unlinking Objects in AutoPage Publications
- Resequencing Linked Objects in AutoPage Publications

AutoPage Publication Planner

The AutoPage Publication Planner is used to plan page content and view the status of paginated pages. It is also used to resequence publication sections and either resequence or remove the **products**, **classifications**, **assets**, and/or **entities** that are linked to them.

To view the AutoPage Publication Planner, select a publication, section, or subsection in the Tree, then click the **AutoPage Publication Planner** tab.



Node	Layout Status	Columns (Width x ...	Page Number	Overset	Data Changed
Beta Tools					
Tools					
Toolboxes					
Power Tools					
Garden Tools					
Anvils					
Acme Anvil		57.4mm x 100.22mm	9		
Roadrunner Anvil		57.4mm x 127.31mm	9		
Hardware					
Cable and Electric					
Batteries					
Recharge A		57.4mm x 50.01mm	13		
Recharge AA		57.4mm x 50.01mm	13		
Recharge AAA		57.4mm x 59.58mm	14		
Recharge AAAA		57.4mm x 59.58mm	14		
Recharge C		57.4mm x 50.01mm	14		
Recharge D		57.4mm x 50.01mm	14		
A		57.4mm x 50.01mm	15		
AA		57.4mm x 50.01mm	15		
AAA		57.4mm x 59.58mm	15		
AAAA		57.4mm x 50.01mm	15		
C		57.4mm x 50.01mm	16		
D		57.4mm x 59.58mm	16		
9 Volt		57.4mm x 50.01mm	16		
Cable					
Lighting					
Safety					

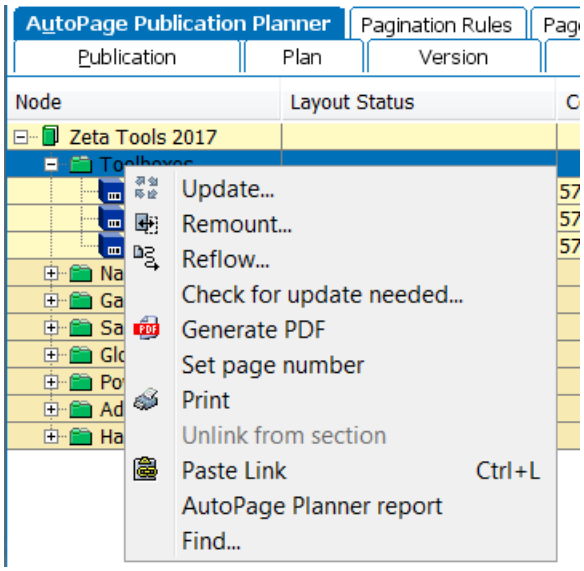
Columns in the AutoPage Publication Planner

The following table describes the columns contained in the AutoPage Publication Planner. Note that columns cannot be added to / removed from the planner.

Column Name	Description
Node	Displays the publication, sections, subsections, and linked objects within the publication.
Layout Status	Displays 'Locked' if the object's layout has been locked in the Page Inspector. For more information about locking and unlocking layouts, see the **Page Inspector** topic.
Columns (Width x Height)	The width and height of the product presentation on the paginated page. An asterisk (*) next to the value means that the product presentation is split over more than one page. **Note:** The unit always displays in mm, even if a different unit is applied to the publication group that contains the publication.
Page Number	Page where the object is mounted.
Overset	Displays 'Overset' if there is at least one frame on the InDesign page where there is too much content to fit inside of the frame. For more information on oversets, see the **Viewing Markers and Overset Text** topic.
Data Changed	Displays 'Data changed' if content on the page has been changed in STEP since the page was mounted. **Note:** A 'check for update needed' operation must be performed on a section or subsection before the system will know if any data has changed on the page. For more information, see the **Updating Documents in AutoPage** topic.

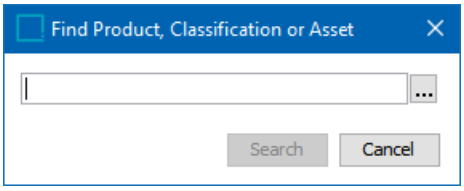
Available Right-click Actions in the Publication Planner

From the AutoPage Publication Planner you can perform the following actions by right-clicking either on the publication, a section, or a linked object.



Action	Description	Level Where Available		
		Publication	Section	Linked Object
Update	Updates the content on pages in the selected publication or section. You can either update all content or select a subset of information, such as attribute values, commercial terms, or image references. For more information, see **Updating Documents in AutoPage**.	X	X	
Remount	Remounts one or more objects at a time. For more information, see **Remounting and Reflowing Objects**.		X	X
Reflow	Reflows objects from the selected object until the end of a page or the end of a section. For more information, see **Remounting and Reflowing Objects**.	X	X	X
Check for update needed	Launches a background process that scans through all pages in the section and determines if data has changed on any of the mounted products in STEP since the pages were mounted. For more information, see **Updating**		X	

Action	Description	Level Where Available		
		Publication	Section	Linked Object
	Documents in AutoPage.			
Generate PDF	Generates a PDF of the publication or selected section. (Pages must first be autopaginated.) See the **Generating PDFs in AutoPage** topic for more information.	X	X	
Set page number	Remounts pages (either fully or partially) in the selected publication or section so that they start on a specified page. For more information, see **Controlling Page Numbers**.	X	X	
Print	Prints the documents contained within the publication or selected section. For more information, see **Printing Pages in AutoPage**.	X	X	
Unlink from section	Unlinks the product, asset, or classification object from the section. See **Linking and Unlinking Objects in AutoPage Publications** for more information.			X
Paste Link	This option is enabled when a product, asset, or classification object has been copied from the Tree. Selecting Paste Link will link the copied object into the section. See **Linking and Unlinking Objects in AutoPage Publications** for more information.		X	
AutoPage Planner report	Extracts a CSV file that pulls all available information from the AutoPage Publication Planner, including all node levels of the publication and what objects are linked to each section and subsection. For more information, see the 'Creating an AutoPage Planner Report' subsection below.	X	X	

Action	Description	Level Where Available		
		Publication	Section	Linked Object
Find	Launches a dialog that enables search for a product, classification, or asset within the publication or selected section. 	X	X	

Creating an AutoPage Planner Report

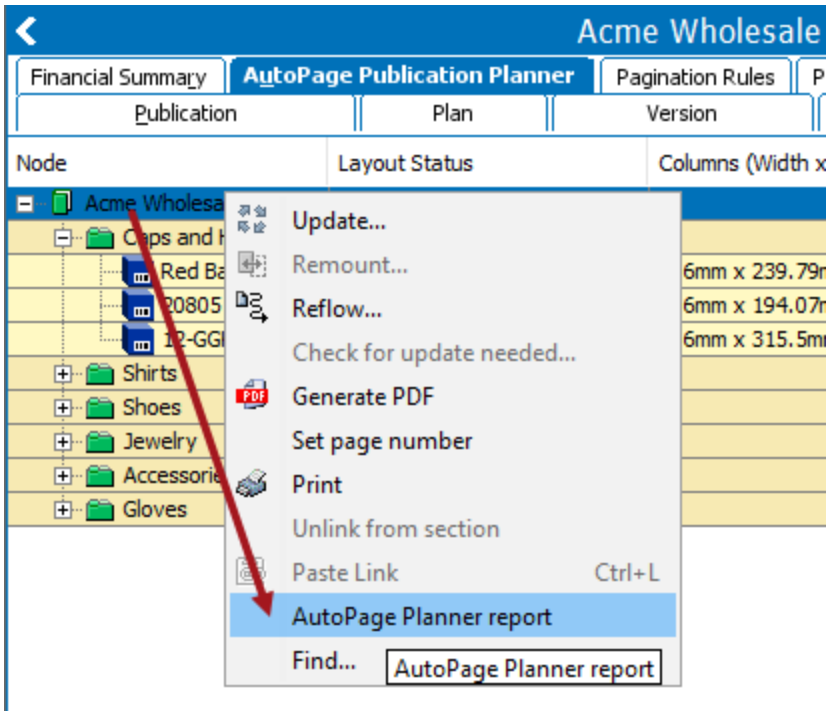
The AutoPage Planner Report is a comma-separated (CSV) file that contains the information displayed in the AutoPage Publication Planner. This report provides both the STEP ID and Name of the products linked into the publication and is helpful for users to view this information offline.

The following screenshot shows a portion of a sample AutoPage Planner Report, as viewed in Excel.

	A	B	C	D	E	F	I	J	K	L	M
1	'Start Node'	'Beta Tools'	'170448'								
2	'Node level 1'	'Node level 1 - ID'	'Node level 2'	'Node level 2 - ID'	'Node level 3'	'Node level 3 - ID'	'Layout Status'	'Columns (Width x Height)'	'Page Number'	'Overset'	'Data Changed'
3	''	''	''	''	''	''	''	''	''		
4	''	''	'Tools'	'241736'	''	''	''	''	''	''	
5	''	''	''	''	'Toolboxes'	'170451'	''	''	''	''	
6	''	''	''	''	''	''	''	'160mm x 204.19mm'	'2'	''	
7	''	''	''	''	'Power Tools'	'170471'	''	''	''	''	
8	''	''	''	''	''	''	''	'57.4mm x 62.37mm'	'18'	''	
9	''	''	''	''	''	''	''	'57.4mm x 50.01mm'	'18'	''	
10	''	''	''	''	''	''	''	''	''	''	
11	''	''	''	''	''	''	''	'57.4mm x 103.6mm'	'18'	''	
12	''	''	''	''	''	''	''	''	''	''	
13	''	''	''	''	''	''	''	''	''	''	
14	''	''	''	''	''	''	''	'57.4mm x 62.96mm'	'19'	''	
15	''	''	''	''	''	''	''	'57.4mm x 62.96mm'	'19'	''	
16	''	''	''	''	''	''	''	'57.4mm x 73.12mm'	'19'	''	
17	''	''	''	''	''	''	''	'57.4mm x 73.12mm'	'20'	''	
18	''	''	''	''	'Garden Tools'	'170453'	''	''	''	''	
19	''	''	''	''	''	''	''	''	''	''	
20	''	''	''	''	''	''	''	'57.4mm x 103.6mm'	'4'	''	
21	''	''	''	''	''	''	''	'57.4mm x 95.38mm'	'4'	'Overset'	
22	''	''	''	''	''	''	''	'57.4mm x 66.35mm'	'4'	''	

To generate an AutoPage Planner Report:

1. In the Tree, select the relevant publication, section, or subsection, then go to the **AutoPage Publication Planner** tab.
2. In the AutoPage Publication Planner, select the publication, section, or subsection from which you want to pull a report, then right-click and select **AutoPage Planner report**.



3. In the 'Save' dialog, choose a 'Save in' destination, then enter a file name and click **Save**.
4. The report is generated and saved in the selected file location.

Organizing AutoPage Publication Sections

After creating an AutoPage publication structure, it is common to reorganize the order of the sections after the initial creation of the structure. Additionally, since it is very uncommon for all publication sections to be organized in alphabetical order, the object types that comprise the hierarchy must be set to be manually sorted.

Publication sections can be organized in two places in the workbench—in the **Tree** and in the **AutoPage Publication Planner**. Using the Tree is the recommended method, since subsections cannot be promoted to top-level sections in the AutoPage Publication Planner; they can only be reordered within their parent sections.

Organizing Publication Sections and Subsections in the Tree

Sections and subsections in publications can be manually organized in the Tree through drag-and-drop operations as long as the following object types are set to **Manually Sorted** = Yes:

- Publication Group (typically, the object type with the STEP ID 'Publication group root')
- Publication (typically, the object type with the STEP ID 'Default publication type')
- Section (typically, the object type with the STEP ID 'Section')

In the Tree, subsections may be dragged and dropped out of their parent sections and promoted to higher-level subsections or top-level sections. Likewise, sections may be dragged and dropped into other sections, enabling the 'demotion' of sections to subsections.

This functionality simplifies the maintenance of more complex publications where multiple levels of organization are needed.

For more information, see **Organizing Publication Sections in the Workbench** in the **STEP Publisher** documentation.

Using the AutoPage Publication Planner

1. In the Tree, click the relevant section or subsection.
2. On the **AutoPage Publication Planner** tab, click the object you want to change the sequence of, and then drag and drop it to its new position.

Note: You must repaginate or reflow the pages before the object resequencing takes effect on the page.

Linking and Unlinking Objects in AutoPage Publications

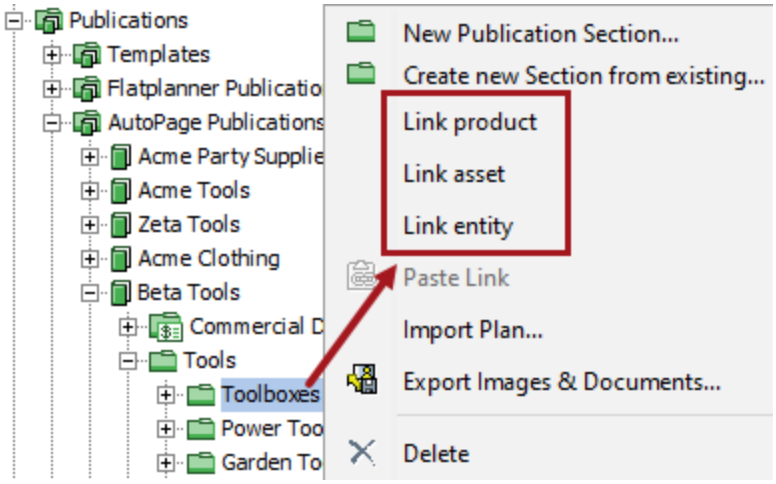
Products, assets, classifications, and/or entities must be linked to the sections and subsections of the publication before the publication can be paginated. These objects are mounted onto the pages of the publication and are paginated in the sequence in which they appear in the publication hierarchy. As such, linking objects to publication sections is mandatory for AutoPage publications. Product, asset, classification, and entity objects may be linked to publication **sections** and **subsections** in the publication hierarchy. Product and asset objects (but not classifications or entities) may also be linked to **publications** (top-level publication objects).

Several methods are available for linking objects into AutoPage publications:

- Manually linking objects to publications and publication sections through right-click actions within the publication hierarchy in the Tree
- Manually linking objects to publications and publication sections from the objects' References tab
- Using drag and drop or copy and paste in the Tree
- Using drag and drop or copy and paste in the AutoPage Publication Planner
- Using an imported STEPXML or Publication Excel file that contains product IDs, asset IDs, classification IDs, and/or unique key IDs

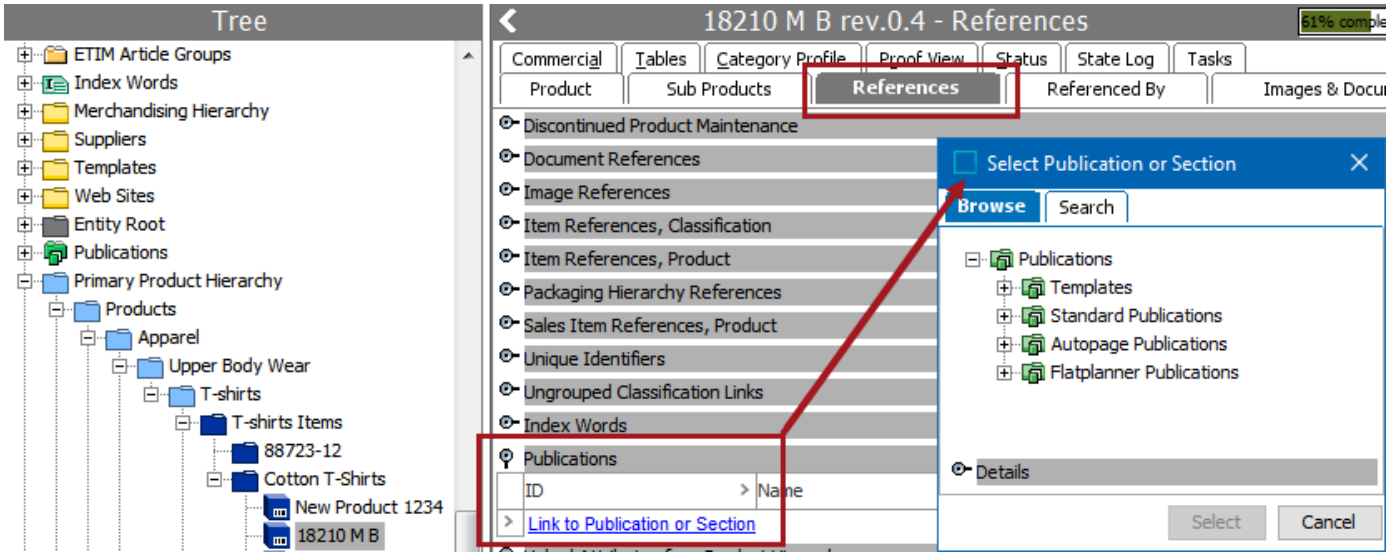
Manually Link Objects From the Publication Hierarchy

Product, entity, and asset objects can be linked to publication and section objects in the Tree through right-click actions on publication hierarchy objects. For full details and instructions, see the **Linking Objects in the Publication Hierarchy** topic in the **STEP Publisher** documentation.



Manually Link Objects From the References Tab

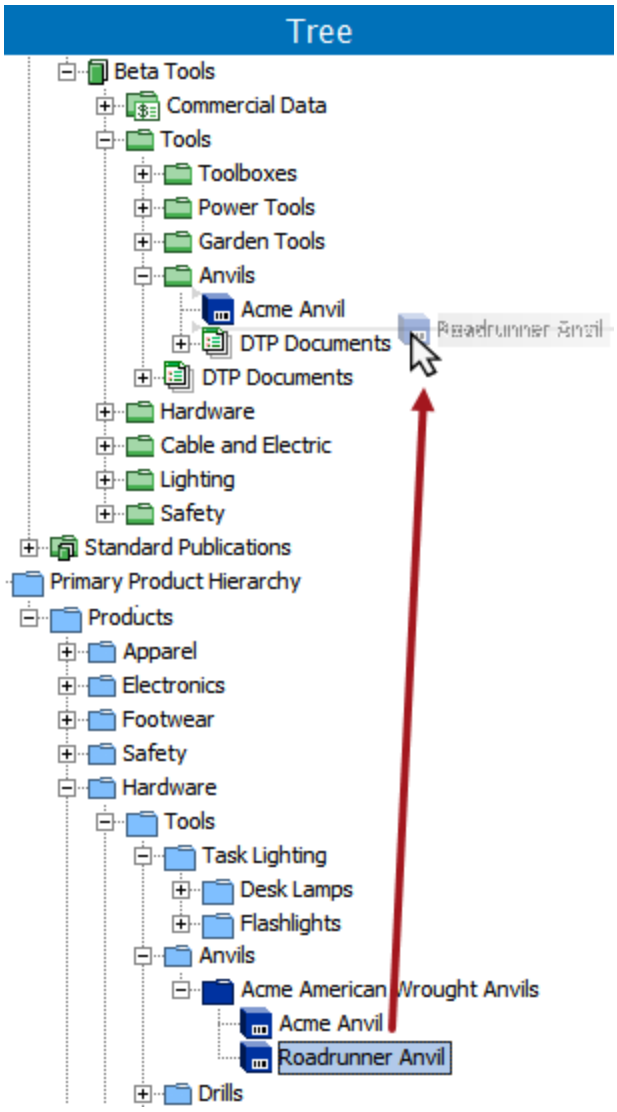
Objects can also be linked into publication sections from the References tab by clicking 'Link to Publication or Section' under the Publications flipper. For full details, see the **Linking and Unlinking Publication Products, Assets, and Classifications** topic in the **Publications** section of the **Getting Started / User Guide** documentation.



Drag and Drop Objects Within the Tree

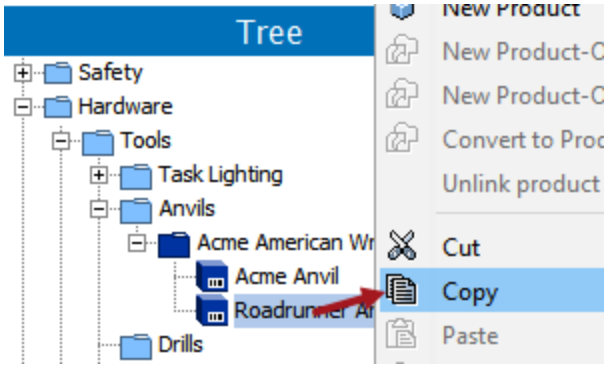
1. Expand the publication section or subsection to which you want to link objects.
2. In the product or classification hierarchy, select the relevant object, then hold down your left mouse key and drag and drop the object into the relevant section or subsection. To select multiple objects, press and hold the SHIFT or CTRL key while you click the relevant objects.

> **Note:** When you drag and drop a product node or a classification node into a section or subsection, only the node itself is inserted. No child nodes are inserted.

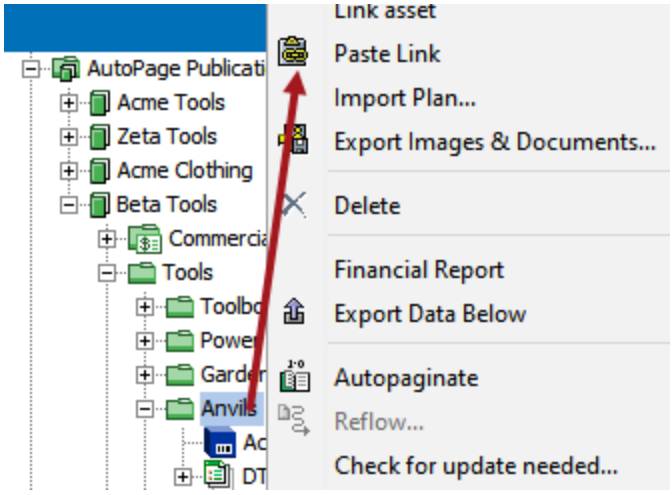


Copy and Paste Objects Within the Tree

1. In the Tree, select the object(s) that you want to link to the publication section or subsection, then right-click and select **Copy**. Objects can be multi-selected by holding the Shift or CTRL key while making selections.



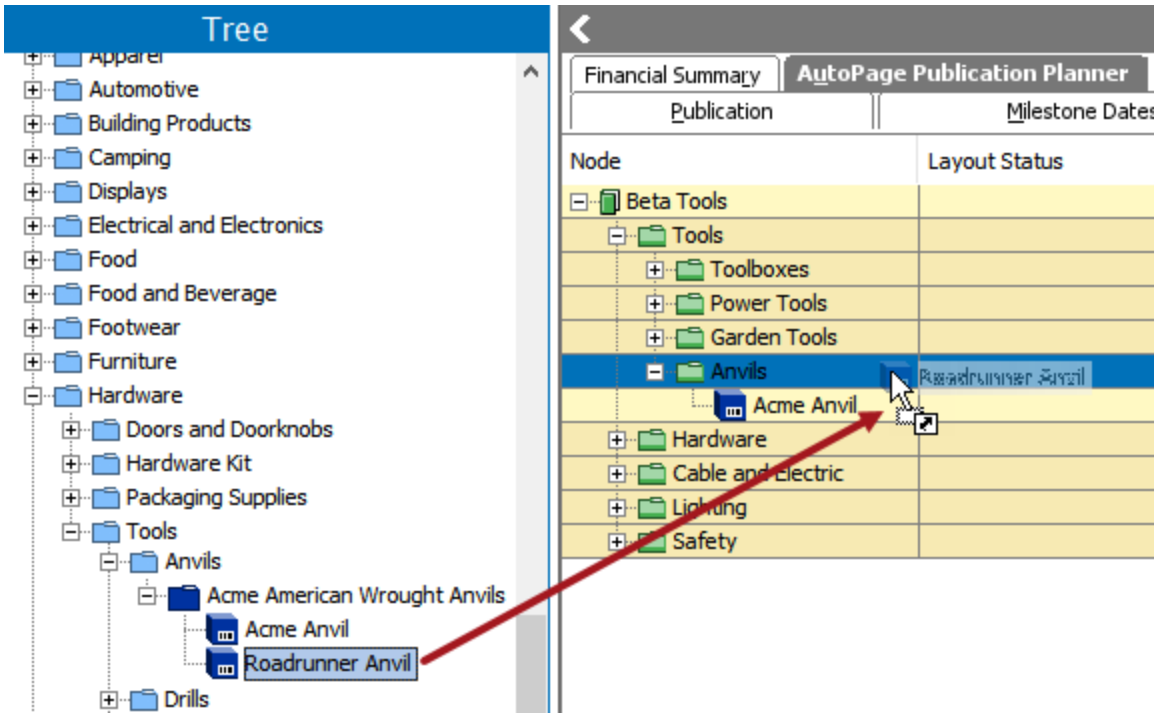
2. Select the publication section where the object(s) should be linked, then right-click and select **Paste Link**.



Drag and Drop Objects to the AutoPage Publication Planner From the Tree

1. Navigate to the relevant publication or section / subsection, then click on the **AutoPage Publication Planner** tab.

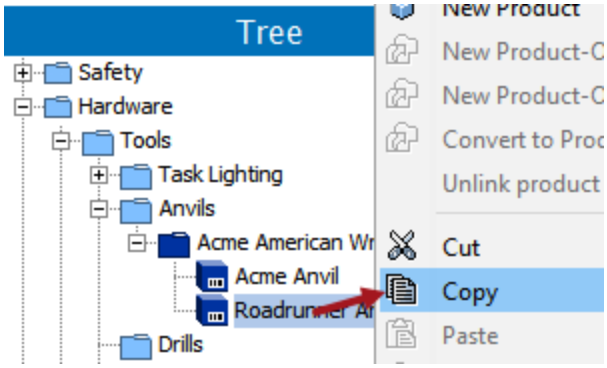
2. In the Tree, select the relevant object (product), then hold down your left mouse key and drag and drop the object into the relevant section or subsection within the AutoPage Publication Planner. To select multiple objects, press and hold the Shift or CTRL key while you click the relevant objects.



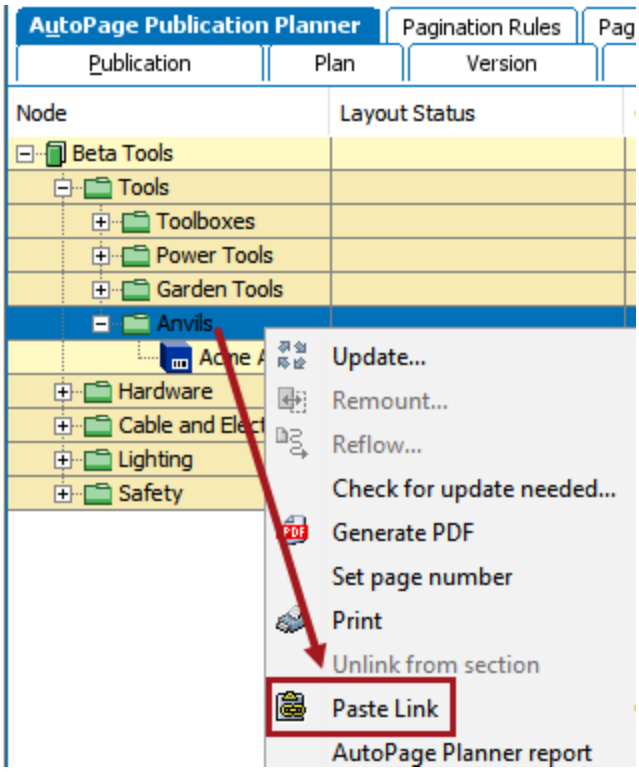
Note: To multi-select objects from the Tree, you must first lock the AutoPage Publication Planner editing area by clicking the **thumb pin** icon in the upper left corner of the interface. If not locked, the editor will change to display information about the object(s) selected in the Tree. When locked, the thumb pin icon looks like this: .

Copy and Paste Objects From the Tree Into the AutoPage Publication Planner

1. In the **Tree**, select the object(s) that you want to link to the publication section or subsection, then right-click and select **Copy**. Objects can be multi-selected by holding the Shift or CTRL key while making selections.



2. In the **AutoPage Publication Planner**, select the publication section where the object(s) should be linked, then right-click and select **Paste Link**.



Import a STEPXML or Publication Excel File

You can link products, assets, and/or classifications to a publication by importing a STEPXML file or Publication Excel file. See the **Exporting and Importing AutoPage Publications in STEPXML** topic and the **Exporting and Importing AutoPage Publications in Publication Excel** topic for more information.

Note: It is not possible to *unlink* an object from the publication structure by importing an XML file. Unlinking must be performed manually, either from the Tree or the AutoPage Publication Planner.

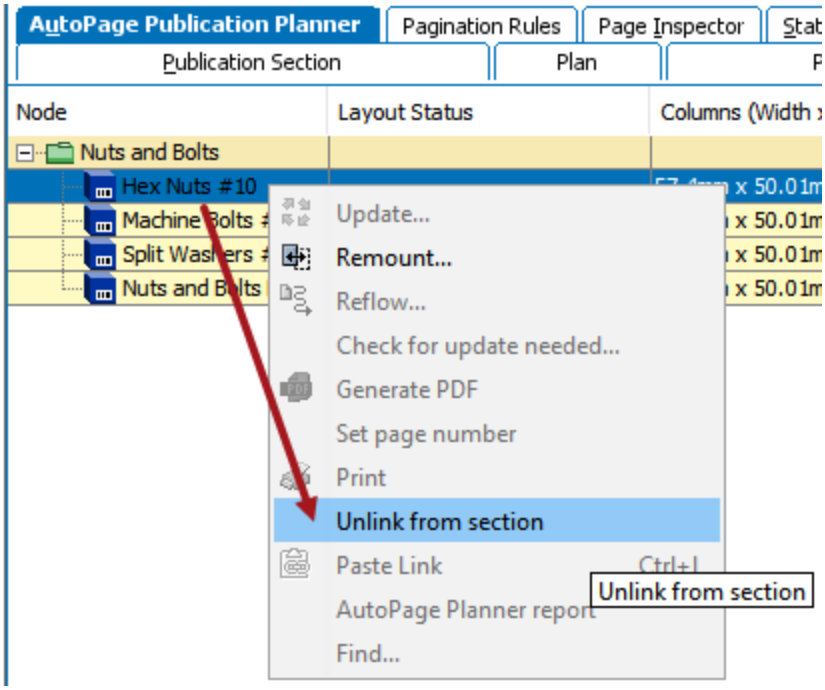
Remove Products, Assets, or Classifications from an AutoPage Publication

Objects can be unlinked from AutoPage publications, sections, and subsections, but these unlink operations must be performed *manually*. Objects cannot be unlinked through the import of a STEPXML or Publication Excel file.

1. In the Tree, navigate to the relevant publication or subsection, then locate the object(s) that you want to unlink. Multiple objects can be selected by holding the Shift or CTRL key while making selections.
2. Select and right-click the object(s), then choose the relevant 'unlink' option (Unlink product, Unlink asset, or Unlink classification.

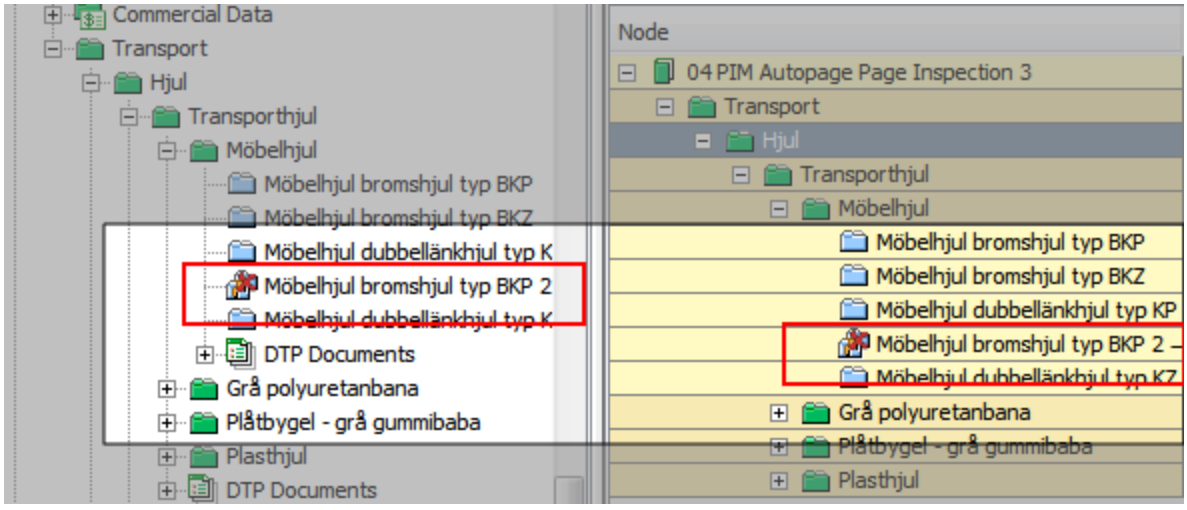
   For more information (including screenshots), see the **Linking and Unlinking Publication Products, Assets, and Classifications** topic in the **Publications** section of the **Getting Started / Super User** documentation.

3. Alternatively, on the **AutoPage Publication Planner** tab, right-click the relevant object, and then choose **Unlink from section**.



Identifying Objects that Are Not in the Workspace

An object is marked with a red cross when the current publication version points to an approved workspace and the object has not been approved yet. An object is also marked with a red cross, when the current publication version points to the main workspace and the object has been deleted from that workspace but still exists in the approved workspace.

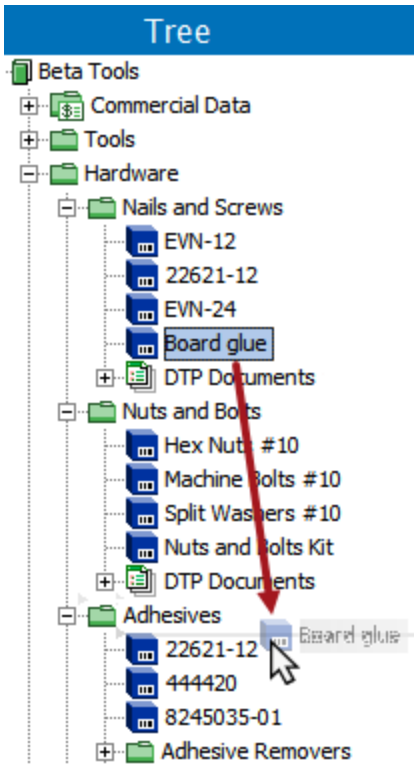


Resequencing Linked Objects in AutoPage Publications

Objects (product, assets, classifications, and/or entities) may need to be resequenced within their respective publication sections after the initial object linking is performed. Objects can be resequenced in the Tree, in the AutoPage Publication Planner, and through either a STEPXML or Publication Excel import.

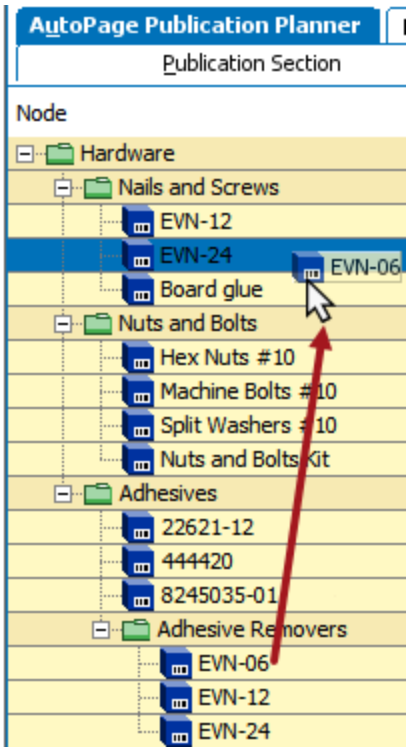
Resequence in the Tree

In the **Tree**, click the object you want to move, then hold down your left mouse button and drag and drop the object to the preferred position in the publication hierarchy. This move can be within a section or from one section to another.



Resequence in the AutoPage Publication Planner

On the **AutoPage Publication Planner** tab, click the object you want to move, then hold down your left mouse key and drag and drop the object to the preferred position. As with the tree, this can be from a section to another section or within a section.



Resequence Using STEPXML

If you use a **STEPXML** file to link objects to a publication, you can change the sequence of the objects by rearranging their tags containing either the STEP ID or unique key IDs in a STEPXML file exported from the publication, then reimporting the file.

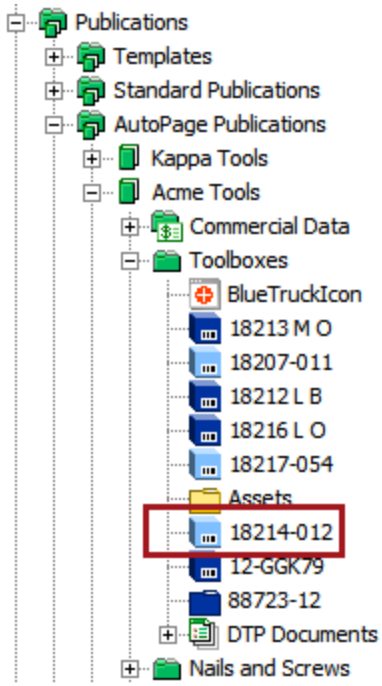
The following example shows how to change the object sequence and add a product using a STEPXML file.

The product named **18214-012**, which uses a STEP ID as an identifier, is moved by changing the position of its tag in the STEPXML file: *<AutoPageProductLink ProductID="18214"/>*. A new product, which uses a unique key as an identifier, is added to the file for the after example: *<KeyValue KeyID="SupplierPartNo">123456-ABC</KeyValue>*. This product will display with the name **18210 M B**.

This sample code is an extract of a STEPXML file. To view a complete file, see the **Exporting and Importing AutoPage Publications in STEPXML** topic.

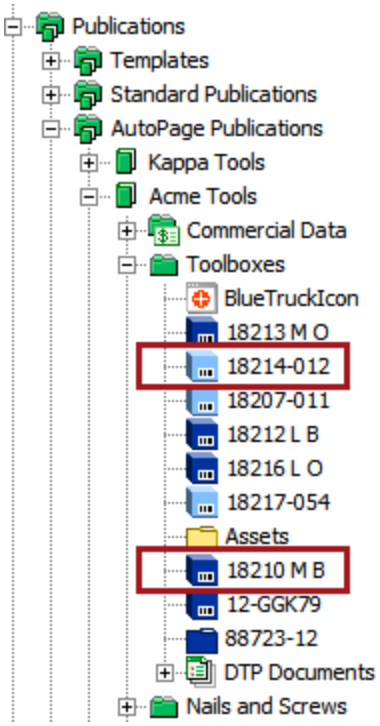
For the STEPXML example, see the online version of this topic.

Objects in Tree Before Sequence Change and Product Addition



For the STEPXML example of this, see the online version of this topic.

Objects in Tree After Sequence Change



AutoPage Pagination Rules

A pagination rule is a rule that controls how, when, and where objects (typically products, but also assets and classifications) are mounted onto InDesign pages when autopaginating publications.

A pagination rule consists of one or more conditions and an action that takes place when the condition or conditions are met. Detailed criteria must be specified for some conditions and actions.

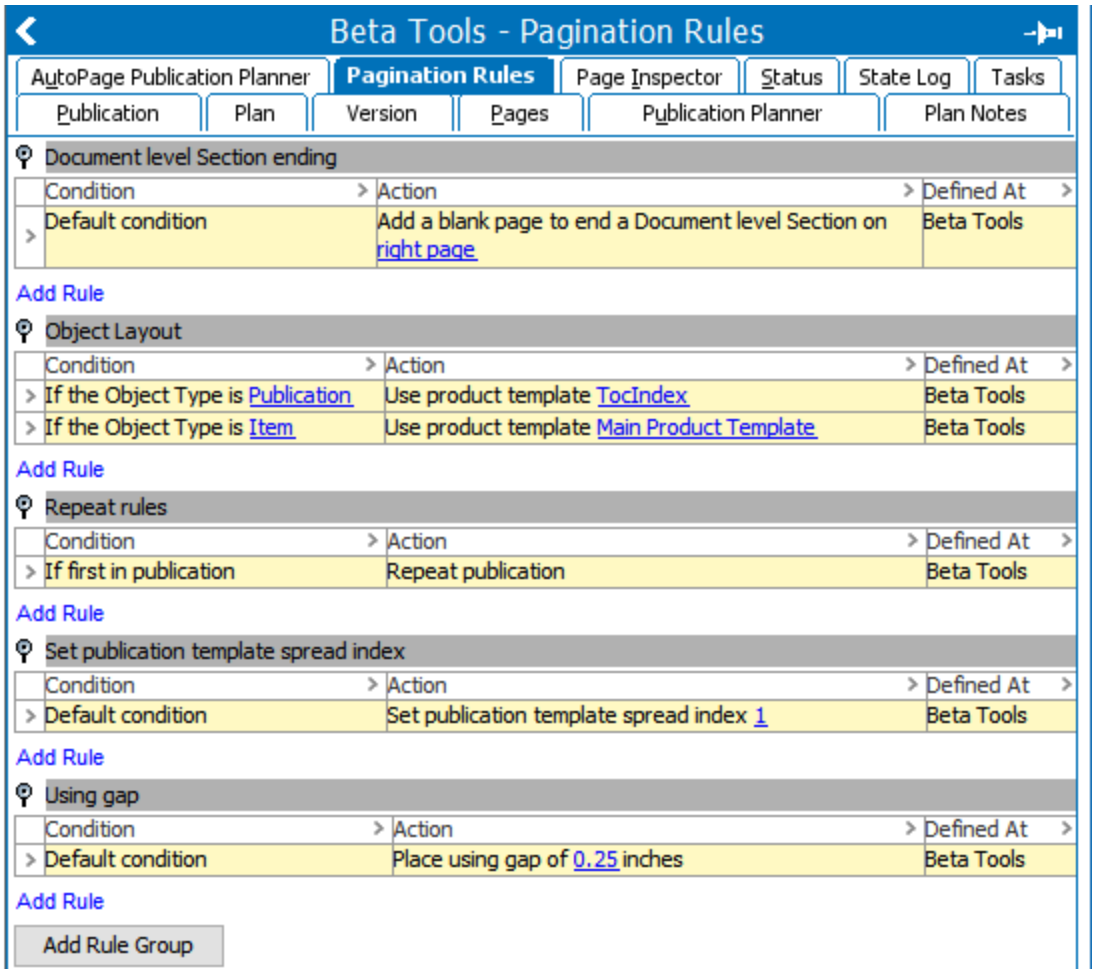
Pagination rules can be applied to entire publications as well as individual sections and subsections. Rules inherit down from the parent publication level to child sections and subsections. Inherited rules can also be overridden, or, rules can be created on sections only and not set at the publication level at all.

Important: In order to run autopagination, at least one 'Object layout' rule must exist. See the **AutoPage Pagination Rule Actions** topic for more information.

Pagination Rules Tab

Pagination rules are created on the **Pagination Rules** tab. To view the Pagination Rules tab, select the relevant publication, section, or subsection in the Tree, then click the **Pagination Rules** tab.

The Pagination Rules tab provides an overview of all conditions and actions applied to the publication and/or section. You can also see where in the publication structure the rules are defined ('Defined At').



Pagination Rule Groups

Pagination rule groups are also known as **Action Groups**, since these groups contain selections of actions that should be taken on mounted objects and pages. Each group also contains an assortment of conditions that are applied to determine exactly how these actions will be carried out.

For detailed information on pagination rule groups and their available **actions**, see **AutoPage Pagination Rule Actions**.

For detailed information on the **conditions** available for pagination rule group actions, see **AutoPage Pagination Rule Conditions**.

Pagination Rule Inheritance

Pagination rules are inherited by child sections from parent publications, and by child subsections from parent sections.

For more information, see the **Pagination Rule Inheritance** topic in the **STEP Publisher** section of this guide.

Pagination Rule Evaluation

Pagination rules are evaluated one-by-one in the list from top to bottom. When the condition of a rule evaluates to `True`, the associated action is then evaluated.

For more information, see the **Pagination Rule Evaluation** topic in the **STEP Publisher** section of this guide.

Editing Pagination Rules

For full details on how to edit pagination rules, see the **Editing Pagination Rules** topic in the STEP Publisher section of this guide.

AutoPage Pagination Rule Conditions

Several conditions are available when setting up pagination rules. Conditions affect which actions are taken on objects as they are placed onto autopaginated pages. This topic provides an overview of what **conditions** are available for AutoPage pagination rules and which rule groups contain which conditions.

List and Description of AutoPage Pagination Rule Conditions

Default condition

The rule is always applied. There are no specific conditions that must be met.

If first in section

The rule is applied if the object is the first object in the section specified in the condition.

If first in publication

This condition is only available within the 'Repeat rules' pagination rule group. This rule is applied if the object is the first object in the publication specified in the condition.

If the Object Type is

The rule is applied if the object is of the same object type as specified in the condition.

If the Object is

The rule is applied if the object is the same as the object specified in the condition.

If the attribute LOV value equals

The rule is applied if the LOV value ID or the LOV value of the attribute value is the same as the value specified in the condition. The rule matches first on ID and second on value, which allows for matching on values from LOVs that do not use value IDs.

Note the following considerations for this condition:

- It is only valid for LOV-based attributes
- It does not apply to multi-valued attribute values. I.e., if the value specified in the condition is 'red' and a multi-valued attribute has two values, 'red' and 'blue,' the condition will not match. The value must be exactly as specified, and not a partial match.

If the attribute value equals

The rule is applied if the attribute value is the same as the value specified in the condition.

Note: This condition does not apply to multi-valued attribute values. I.e., if the value specified in the condition is 'red' and a multi-valued attribute has two values, 'red' and 'blue,' the condition will not match. The value must be exactly as specified, and not a partial match.

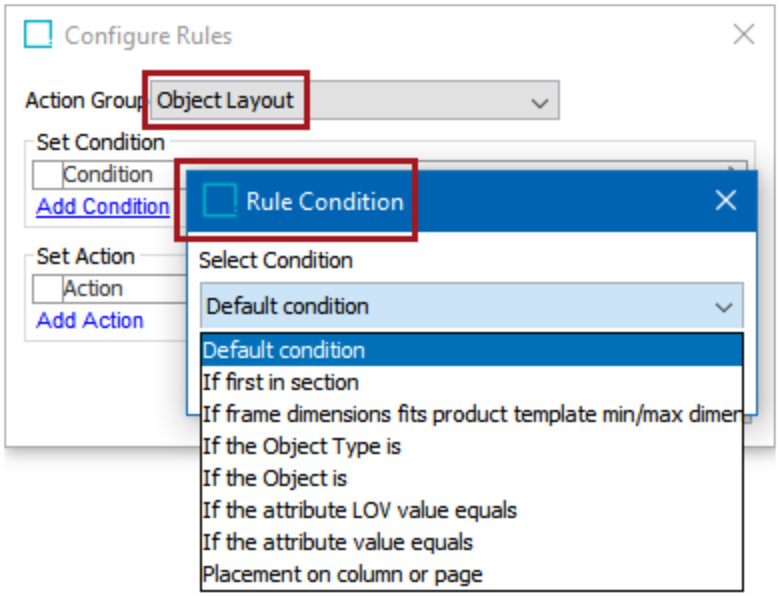
Placement on column or page

The rule is applied if the object is to be paginated in one of the following areas.

- After previous (following the previously paginated object)
- At top of next column
- At top of next page
- At top of next left page
- At top of next right page
- At top of new document
- At top of new document on left page
- At top of new document on right page

Availability of AutoPage Pagination Rule Conditions

Each pagination rule group has a different set of conditions that apply to its usage. For example, the Object Layout pagination rule group contains the conditions shown in the following screenshot:



All conditions are not available for all action groups. The following table describes the pagination rule **conditions** available in AutoPage and the pagination rule groups in which they are available.

Action Group	Conditions							
	Default condition	If first in section	If first in publication	If the Object Type is	If the Object is	If the attribute value equals	If the attribute LOV value equals	Placement on column or page
Column handling	X	X		X	X	X	X	X
Document level Section ending	X							
Execute script	X	X		X	X	X	X	X
Minimum split size	X			X	X	X	X	
Object Layout	X	X		X	X	X	X	X
Position Rules	X	X		X	X	X	X	X
Repeat rules	X	X	X	X	X	X	X	X
Set Minimum Pages Per Document	X	X		X	X	X	X	
Set Publication Spread Index	X	X		X		X	X	X
Use Continuatio	X	X		X	X	X	X	

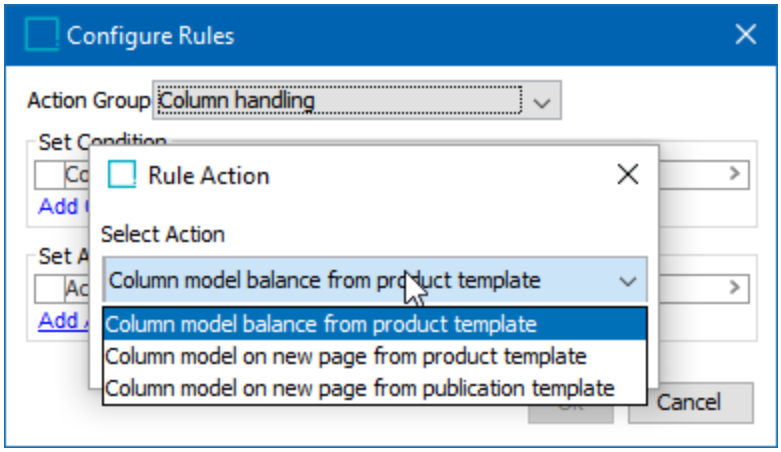
Action Group	Conditions							
	Default condition	If first in section	If first in publication	If the Object Type is	If the Object is	If the attribute value equals	If the attribute LOV value equals	Placement on column or page
n Notes								
Use Vertical Alignment	X	X		X	X	X	X	
Using gap	X	X		X	X	X	X	X

AutoPage Pagination Rule Actions

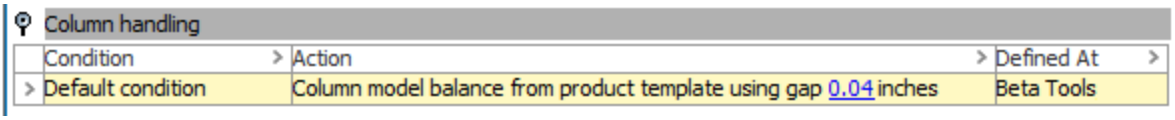
For each AutoPage pagination rule group, a number of actions are available. This topic provides an overview of what **Action Groups** are available within each pagination rule group and what their functions are.

Column Handling

Column handling rules 'handle' how mounted objects are placed into columns across an individual page or across multiple pages.



Column model balance from product template

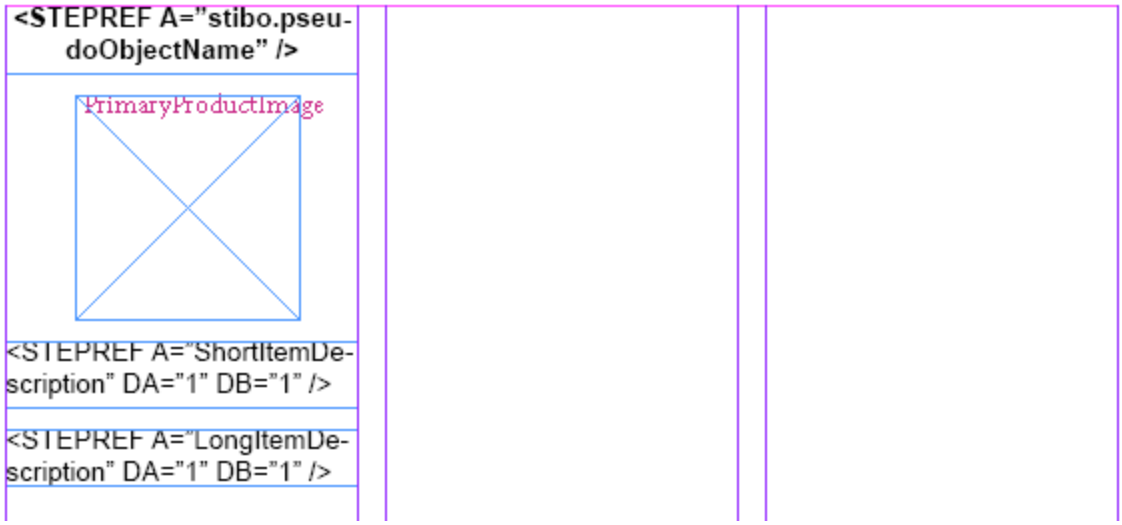


Use Case #1

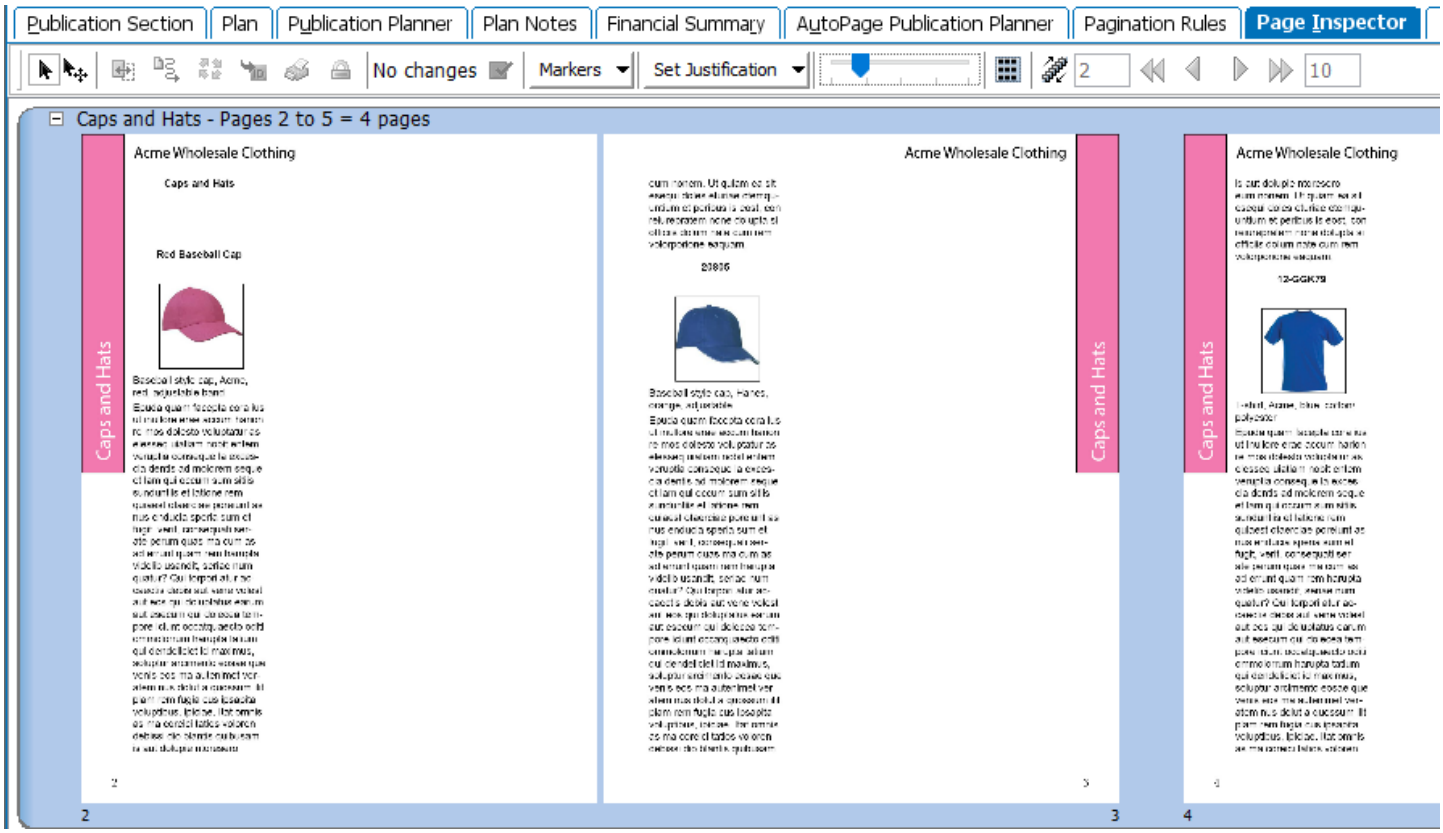
If the publication template does not have any columns set up, but the product template in use *does*, then products will flow across the page based on the width of columns in the product template instead of mounting vertically from top to bottom of the page.

To illustrate, the below screenshot shows a portion of a publication template without any columns:

Products for this example will be mounted using a product template with three columns.



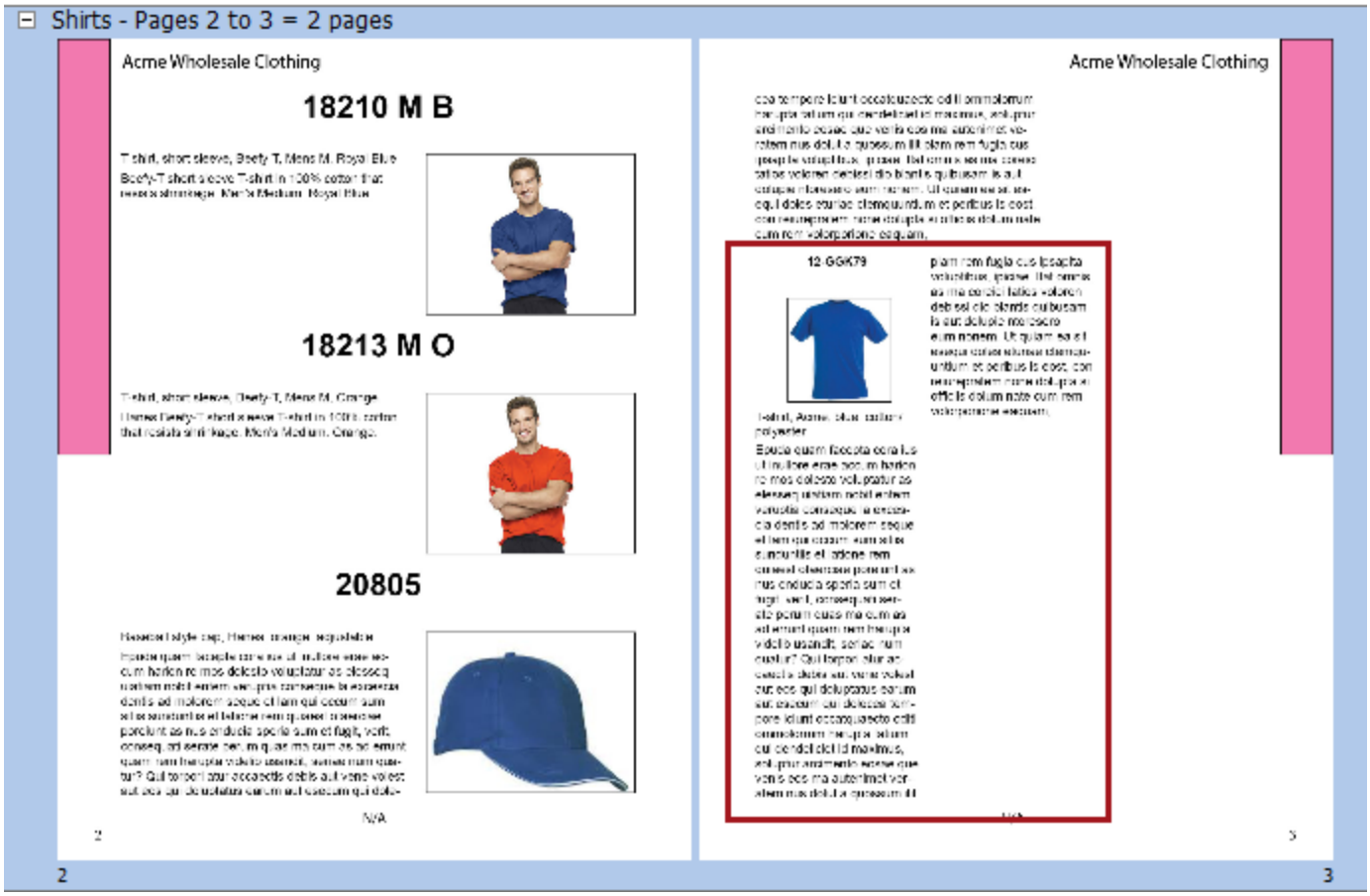
Without using this pagination rule, a selection of three products mounted using this three-column template will paginate as pictured in the following screenshot—each product will mount into the column, but split onto a new page once the column is filled.



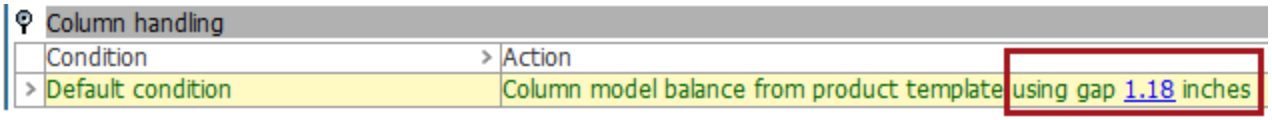
With the rule applied, the products will instead flow to the next column, using the column widths from the product template.

Use Case #2

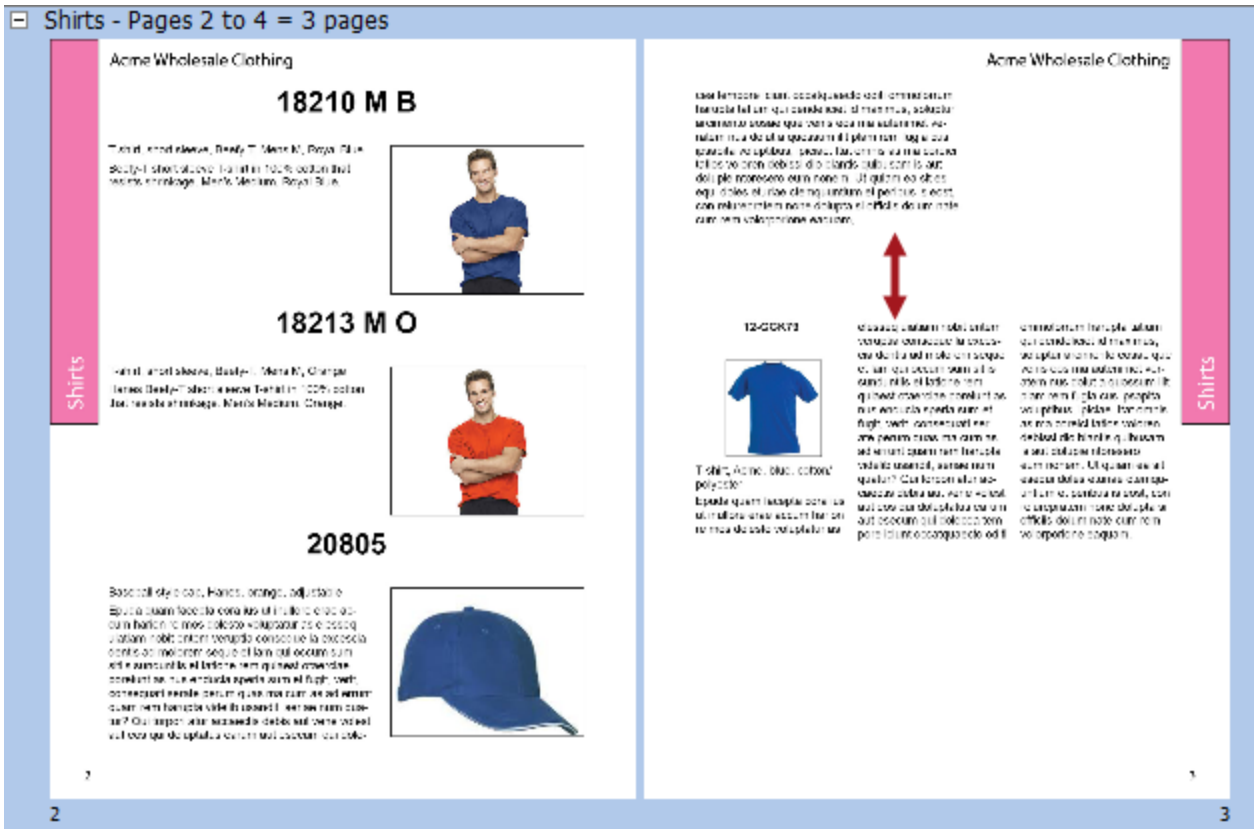
If multiple products are mounted and a product using a column-based product template is mounted immediately after products that are mounted using product templates without columns, the product(s) mounted with the column-based product template will wrap around to the next column instead of splitting across to the next page.



'Using Gap'



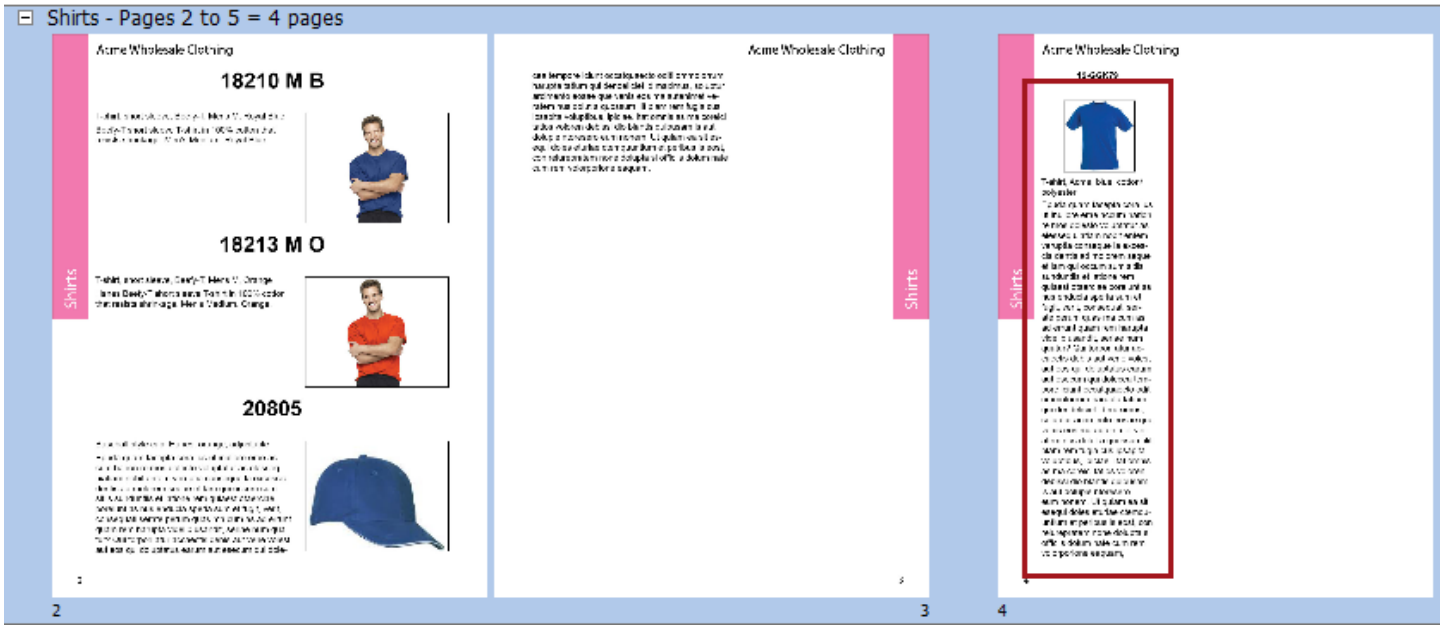
When setting up the 'Column model balance from product template' rule, there is an additional setting where a gap value can be added. This gap sets the space between the product(s) mounted using a non-column template and the product(s) mounted using the column-based template. (Note that this gap value does not set the space between columns, which is picked up from the gutter space between the columns on the product template.)



Column model on new page from product template

Column handling		
Condition	Action	Defined At
Default condition	Column model on new page from product template	Beta Tools

Selecting 'Column model on new page from product template' functions similarly to 'Column model balance from product template' except that the product mounted with the column-based product template will be automatically mounted on the next page.

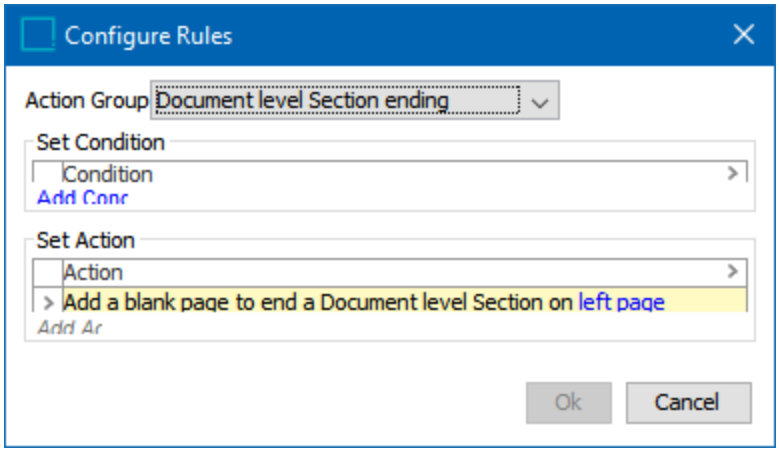


Column model on new page from publication template

Column handling		
Condition	Action	Defined At
Default condition	Column model on new page from publication template	Beta Tools

This rule serves as a way to 'revert' object mounting to default behavior, which is to mount objects according to the columns set on the publication template. When one of the two aforementioned 'column model balance from product template' actions is used ('Column model balance from product template' or 'Column model on new page from product template'), the default mounting behavior is overridden; the columns on the publication template are disregarded and objects are mounted according to the columns on the product template instead. So, to revert to default behavior, the action 'Column model on new page from publication template' would be used on a section or subsection as a way to override an inherited 'column model balance from product template' rule.

Document Level Section Ending



Add a blank page to end a Document level Section

There is only one action in this rule group, 'Add a blank page to end a Document level Section.' This rule specifies whether a document in a document-level section / subsection ends on a left or a right page. This action will always be set as a default condition.

If no products are available to mount on the final page, STEP will add a blank page, which will include 'furniture' (background elements) from the publication template. In some cases, a blank page may be needed at the end of a section to ensure that the next section starts on the correct side.

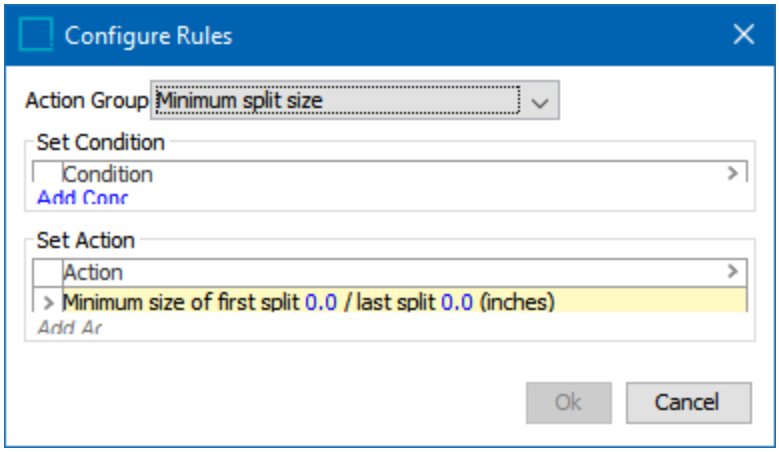
For example, add a blank page to end a Document level Section on <left page>.

Execute Script

There is only one action in this rule group, 'Execute script.' This rule specifies which JavaScript should be executed when the specified condition is fulfilled. The JavaScript interacts with and customizes the mounting.

For example, execute script <name of script> when mounting objects.

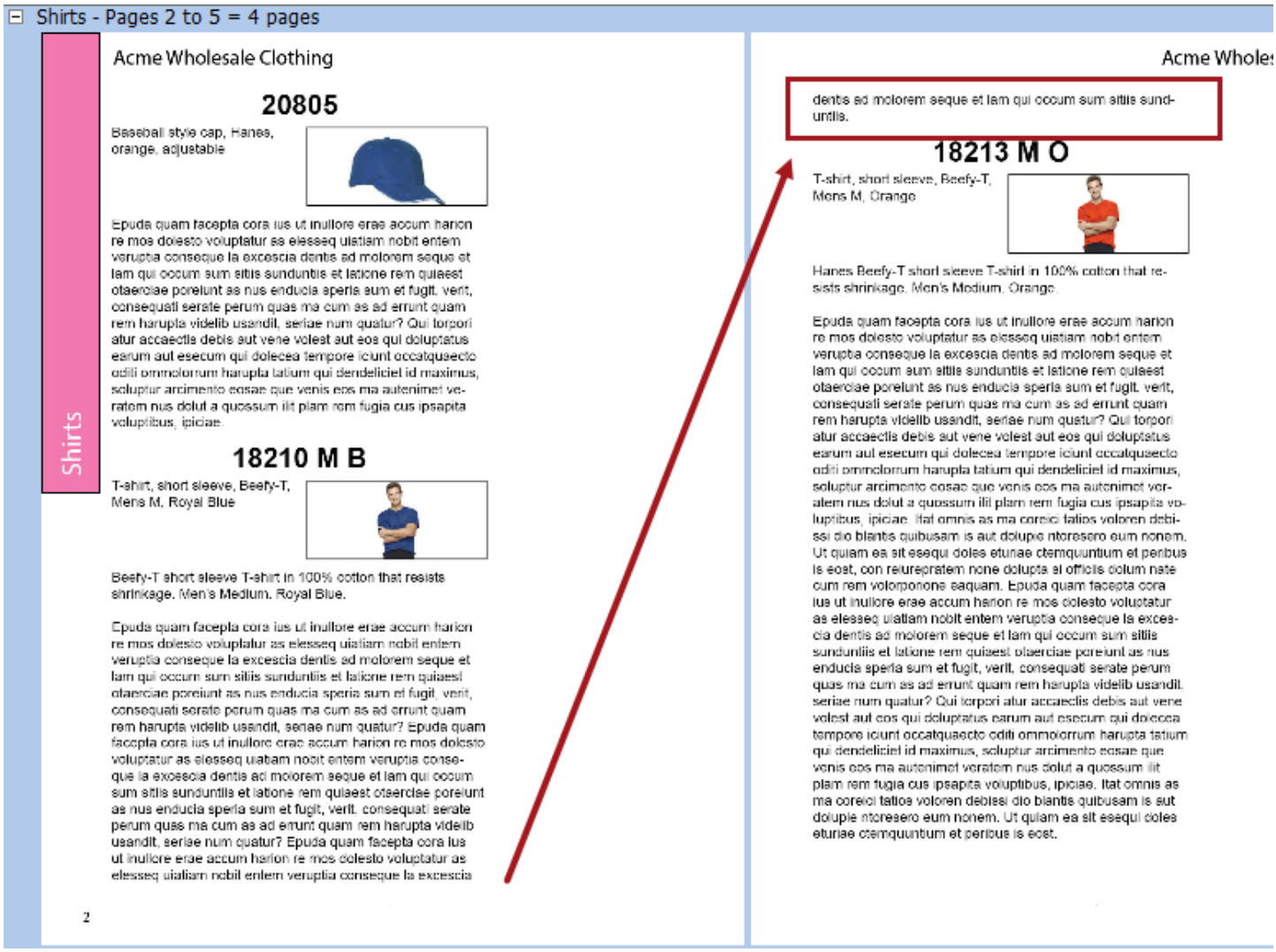
Minimum Split Size



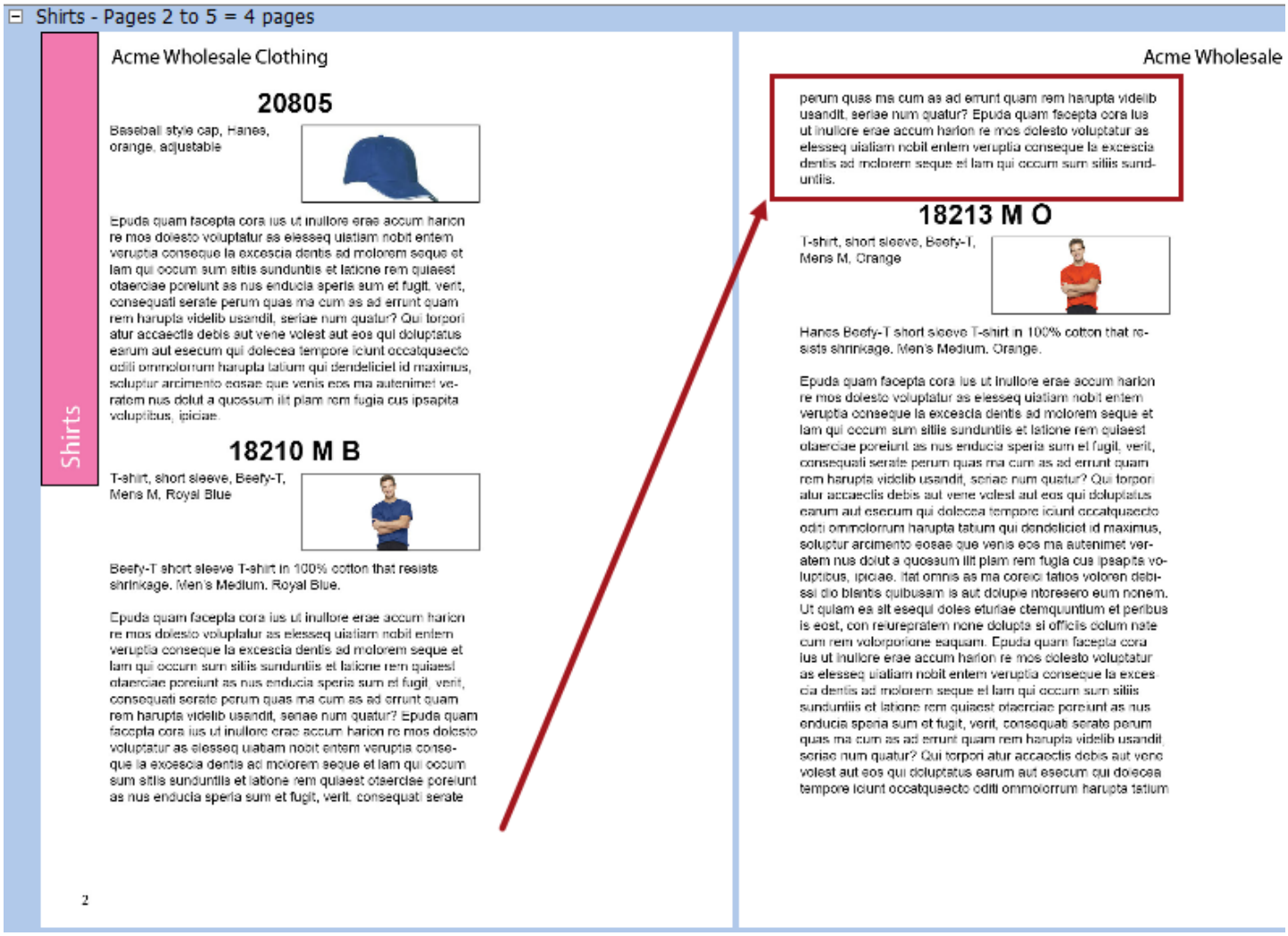
Minimum size of first split / last split

There is only one action in this rule group, 'Minimum size of first split / last split.' This rule controls where lengthy product presentations are split across columns and pages. Its purpose is to avoid situations where a single line or word (known as a *widow* in typography) flows to the next column or page when the rest of the product is on a previous column or page. This rule ensures that a minimum amount of copy splits over to the top of the next column or page. Note that the maximum amount that can be set for either split size (first and last) is 342 points (equivalent to 4.75 inches or 120.65 mm).

To illustrate, the following screenshot shows an example of a lengthy presentation *without* a minimum split rule applied. A dangling line (orphan) has wrapped to the top of the next page.



The following screenshots shows how the same presentation would split with a minimum split size of 1 inch, followed by an illustration of how the rule is configured in STEP. This example rule configuration ensures that at least 1 inch of copy will be rolled over to the top of the next column or page.



Minimum split size	
Condition	Action
Default condition	Minimum size of first split 1.0 / last split 1.0 (inches)

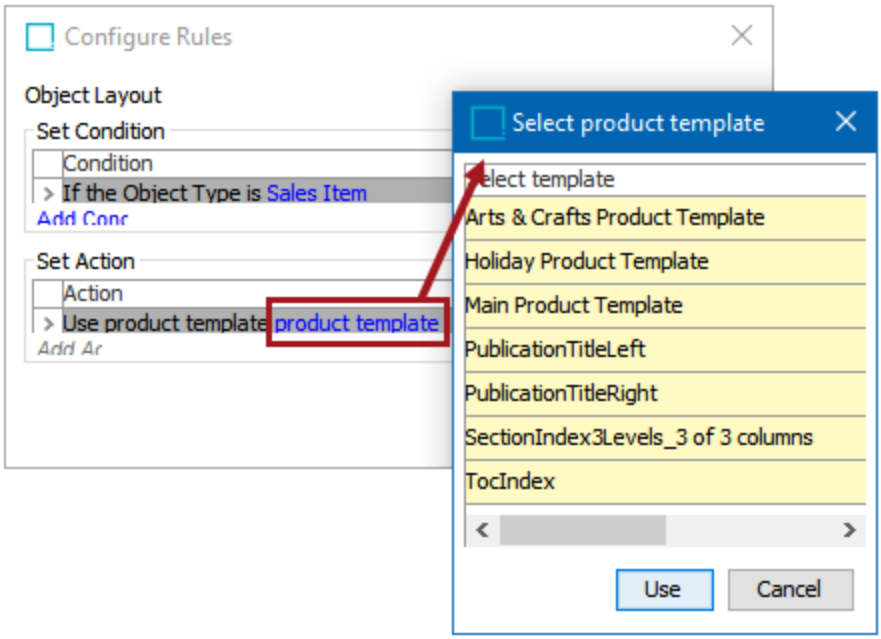
Add Rule

Object Layout

The object layout rules specify what product templates to apply to the objects being mounted.

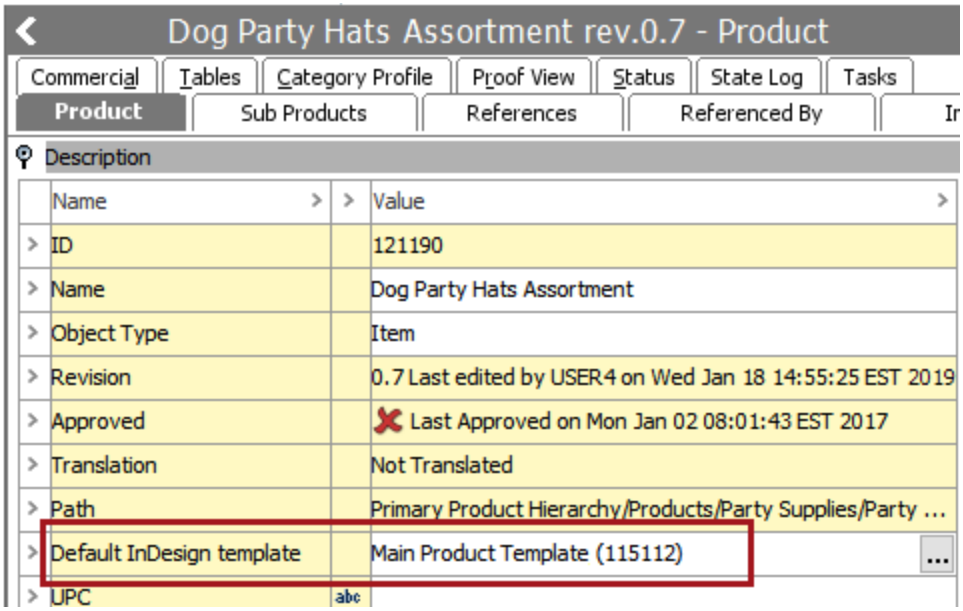
Use product template

Uses a product layout from a specified product template. The list of product templates that display when the 'product template' hyperlink is clicked under 'Set Action' are the product templates applied to the publication on the **Publication** tab.



Use default product presentation

Uses the default product template (Default InDesign template) that has been assigned to the object. For more information, see the **Default InDesign Product Templates** topic in the **STEP Publisher** documentation.

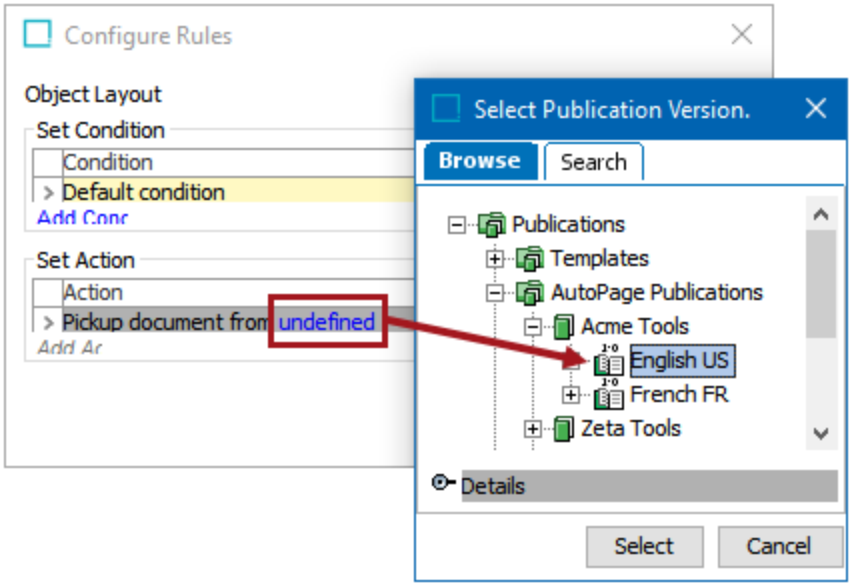


Pickup document

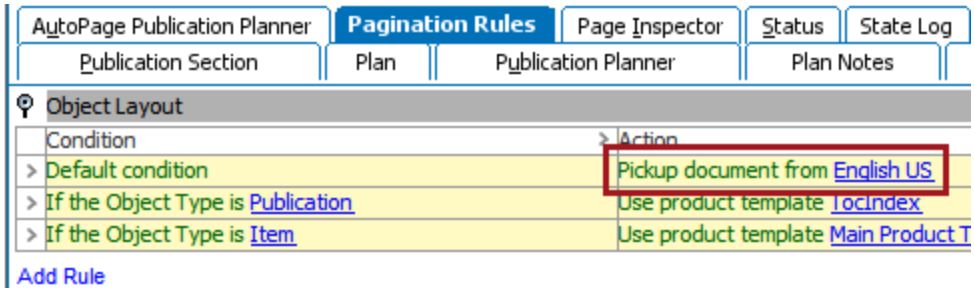
The pickup document option is used to reuse the layout(s) from a **version** of a specified preexisting publication when an object is mounted. When this rule is applied, the system will scan all actual pages within the chosen publication version, then use the layout that was applied to the object in that publication.

When adding the rule, the system prompts you to select the publication version from where it should take the layout, as shown in the below screenshot.

Note: A publication *version* must be chosen since an object's final layout on the InDesign page can vary between different versions within the same publication.



After the version is chosen, the rule will resemble the following:



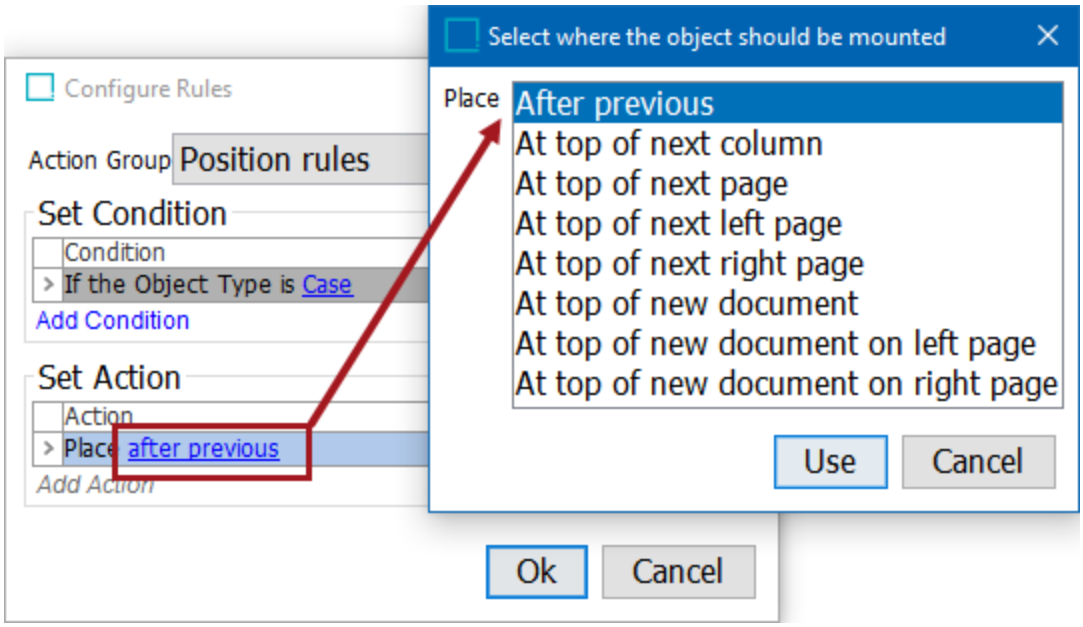
Position Rules

Place

The actions available in the 'Position rules' group specify where to place objects on pages. The available options for 'Place' are:

- After previous (following the previously paginated object)
- At top of next column
- At top of next page
- At top of next left page
- At top of next right page

- At top of new document
- At top of new document on left page
- At top of new document on right page



For example:

- If the object type is product, then position at the top of the next column
- If the attribute value equals a specific value, then position the product at the top of the next page

Repeat Rules

These actions specify the repeat rules for mounting publication and/or section objects themselves. If no rules are set up, no publications, sections, or subsections will be mounted during the autopagination process.

Repeat Publication

Specifies whether the publication should be mounted (and repeated, depending on the object layout rules that are set up for publications). For example, by mounting the publication, a table of contents that pulls the name of all sections in the publication can be placed at the beginning of the publication, or the STEP name and/or metadata (description) attribute values from the publication can be repeated throughout the publication.

Repeat Section

Specifies which section level to be mounted and repeated, depending on the object layout rules that are set up for sections. For example, a table of contents that pulls the name of all subsections in a section can be mounted at the beginning of each section, or the STEP name and/or metadata (description) attribute values from the section(s) can be repeated throughout the section(s).

For example, if first in section 1, then repeat section at level 1.

For more information on use cases for repeat rules, see the **Creating Tables of Contents in AutoPage** topic.

Set Minimum Pages Per Document

Set minimum pages per document

There is only one action in this rule group, 'Set minimum pages per document.' This rule specifies the minimum number of pages that a document must contain before AutoPage forces a new document to be made. The default is two pages per document, which is used if nothing is defined.

For example, always create a minimum of six pages within a document before AutoPage creates a new document.

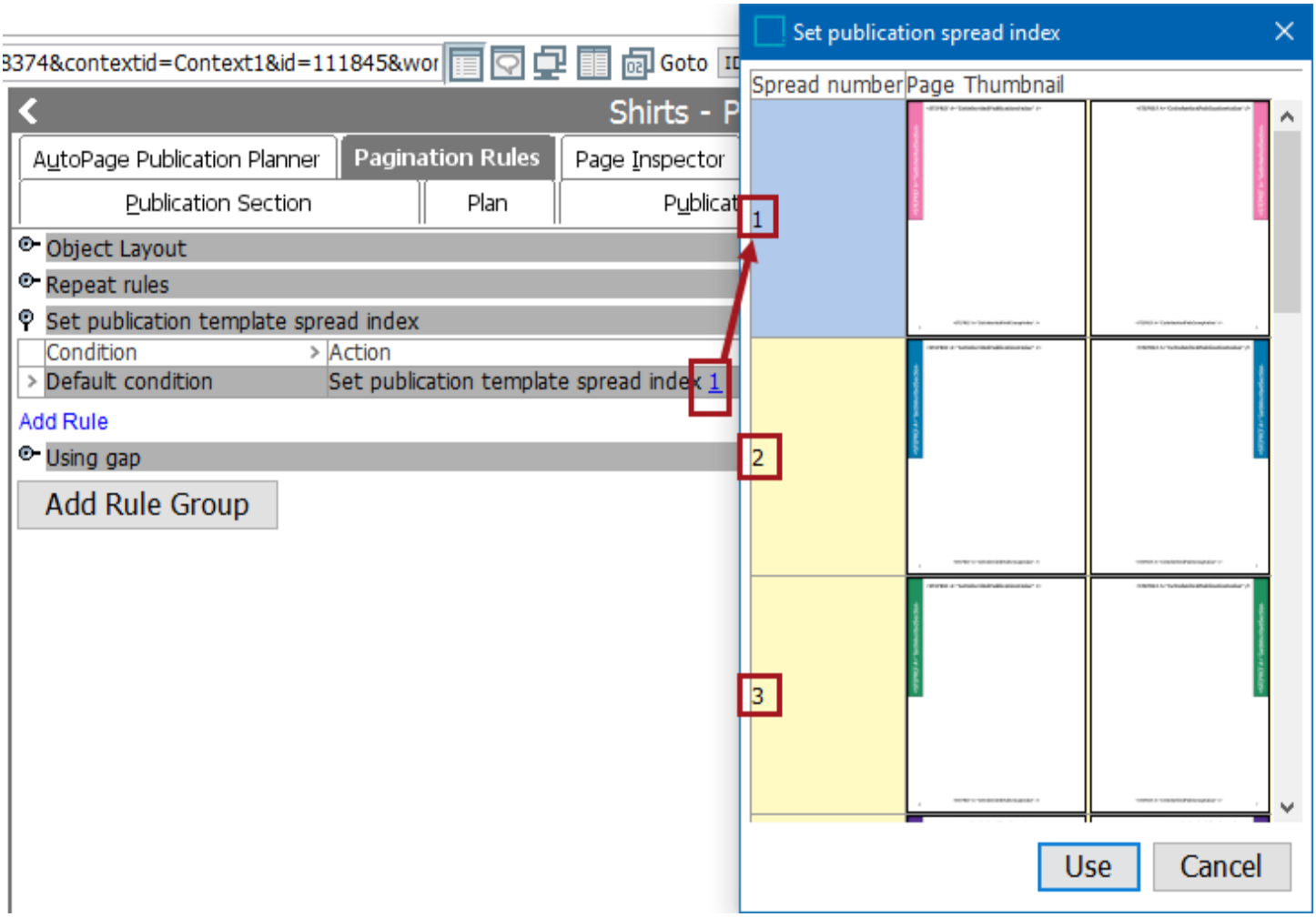
Set Publication Spread Index

Set publication template spread index

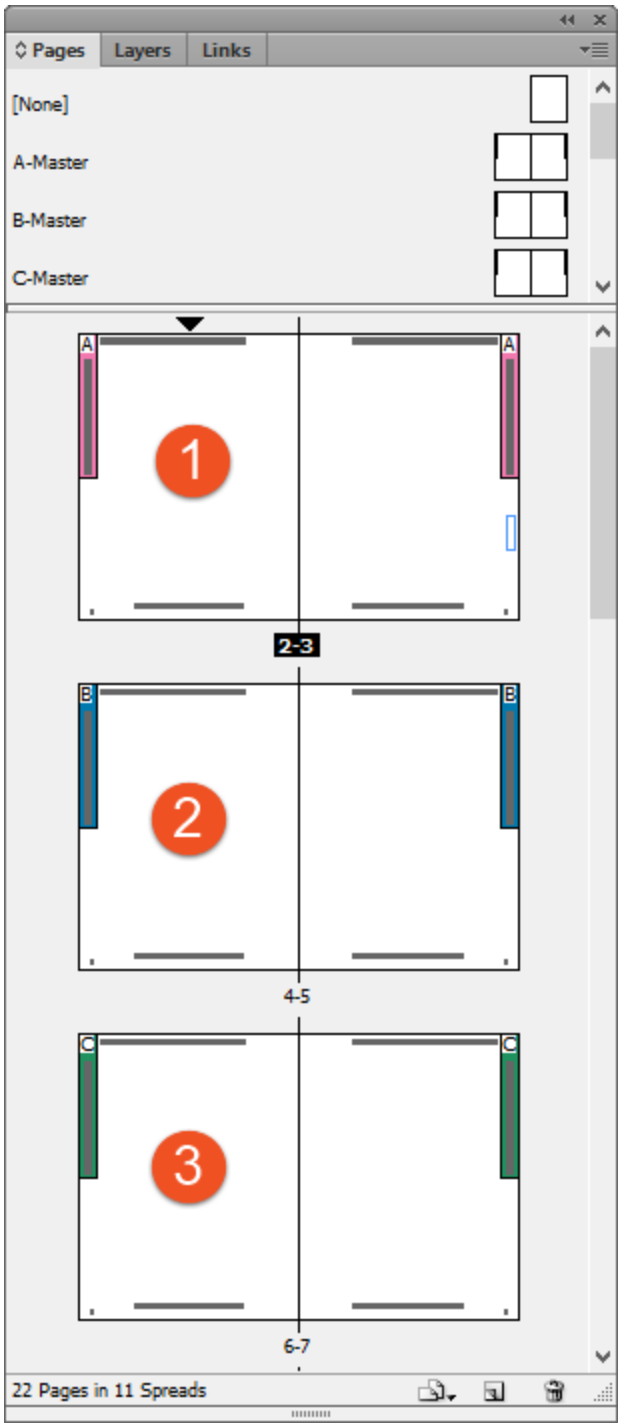
There is only one action in this rule group, 'Set publication template spread index.' This rule specifies which spread within a publication template should be used when an object is paginated on the page.

A publication template often consists of several spreads, containing thumb tabs for each chapter. A typical setup in InDesign would be as follows: a page spread created from master spread A would equal spread index number 1, a spread created from master spread B would equal index spread number 2, and so forth.

The following screenshot shows the view in the workbench when a publication template spread index is selected.

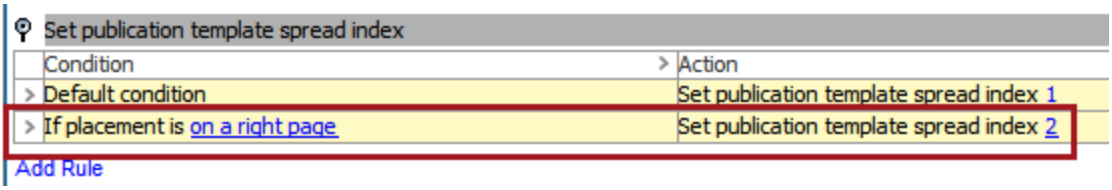


This screenshot shows the corresponding 'spread indexes' of the publication template in InDesign, as viewed from the **Pages** panel.



For example, always use publication template spread index number 1.

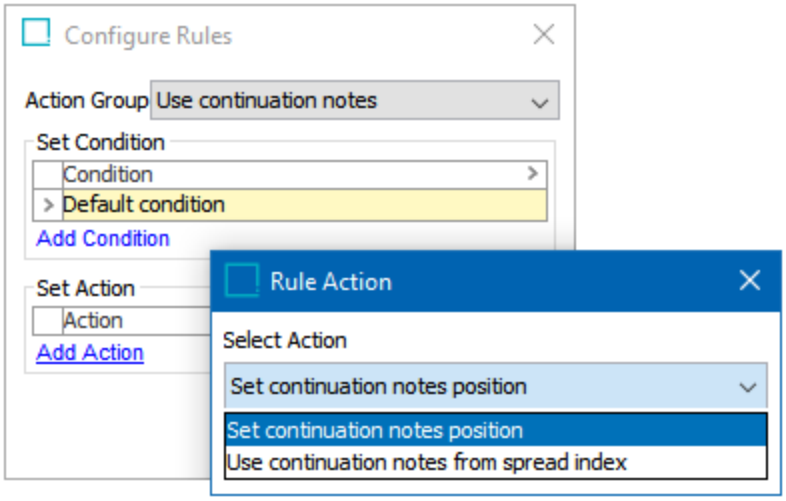
It is also possible to specify a different publication template spread index for the left and right pages. To configure this, set up rules that resemble the following:



Use Continuation Notes

These actions specify the publication template spread number where continuation notes are defined and how continuation notes are going to be placed related to the split presentation. Continuation notes are used for longer product presentations that will be split across multiple pages (for example, products that contain very lengthy tables). Wording such as 'Continued' can be placed at the bottom of the page(s) to inform readers that the presentation is continued on the following page(s).

For full details on how to configure and use continuation notes, see the **Using Continuation Notes** topic.

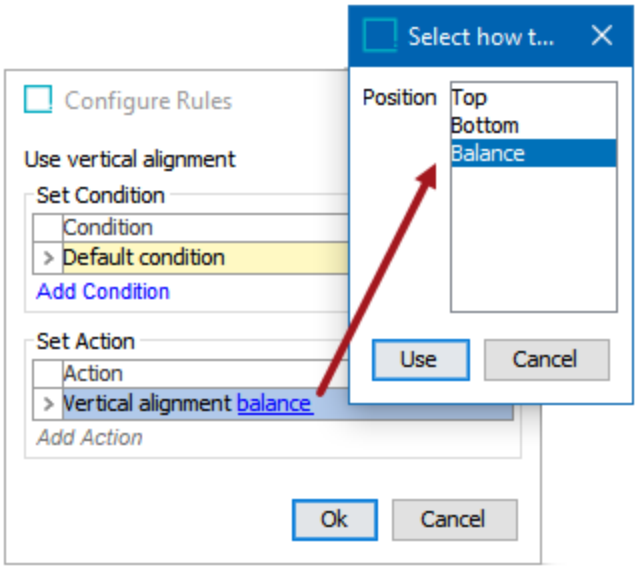


Use Vertical Alignment

Use vertical alignment

There is only one action in this rule group, 'Use vertical alignment.' This rule specifies how to justify objects on a page:

- Top
- Bottom
- Balance (space between objects is distributed evenly)



For example, always balance space between objects on a page.

Using Gap

Using gap

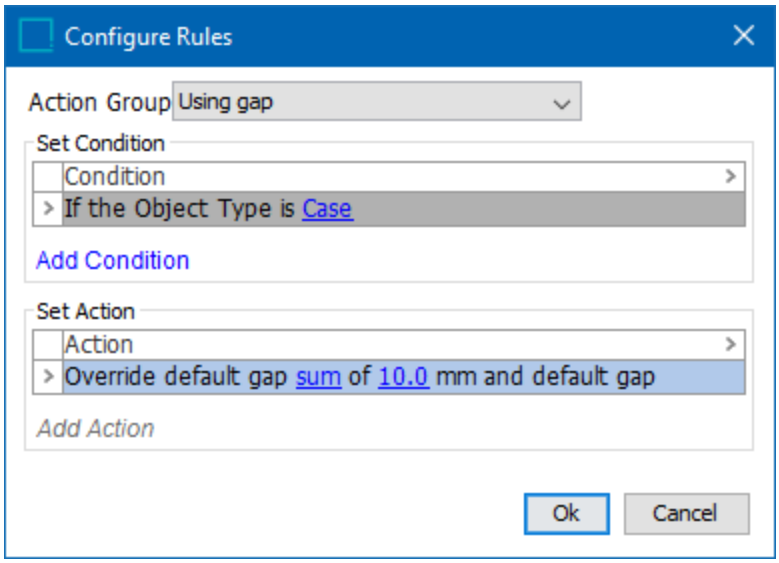
Specifies the distance between objects on a page.

For example, by default, place using gap of 10 mm between all objects on pages.

Override default gap

Overrides 'Using gap.' It can be defined as a sum of 'using gap' and the override gap or a minimum or maximum gap.

For example, if the object type is 'Case,' override the default gap of 10 mm and add an additional 10 mm (setup pictured in below screenshot).


Configure Rules
Action Group
Using gap
Set Condition
Condition
If the Object Type is Case
Add Condition
Set Action
Action
Override default gap sum of 10.0 mm and default gap
Add Action
Ok
Cancel

Using Continuation Notes

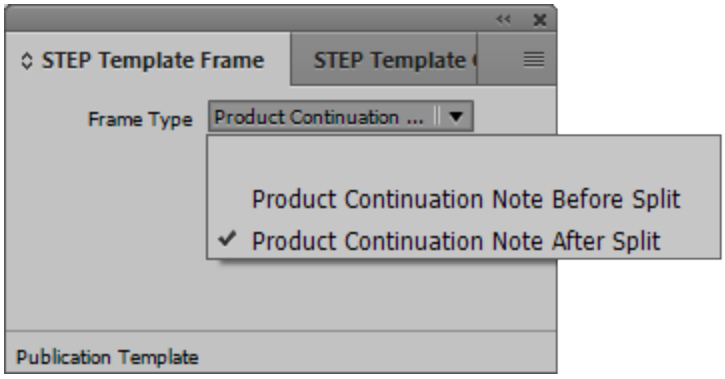
The 'Use Continuation Notes' pagination rule group contains actions that specify the following:

- The publication template spread number where continuation notes are defined
- How continuation notes will be placed related to the split presentation

Continuation notes are used for longer product presentations that are split across multiple pages, often for products that contain lengthy tables. Wording such as 'Continued on' and 'Continued from' can be placed at the bottom and top of the pages to inform readers that the presentation is continued.

Configuring Continuation Notes on the Publication Template

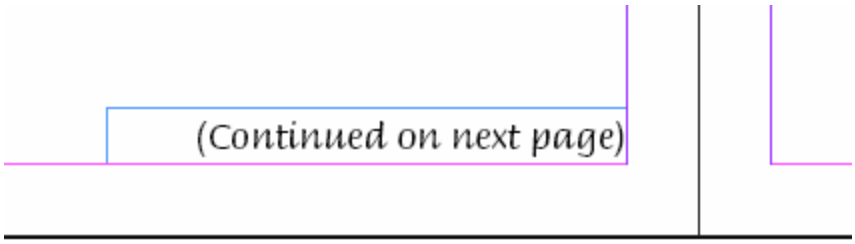
Continuation notes must be placed in a standalone master spread in the publication template. On this spread, the notes are placed into text frames that are configured with the **STEP Template Frame** panel. Two frame type options are available for product continuation notes: **Product Continuation Note Before Split** and **Product Continuation Note After Split**.



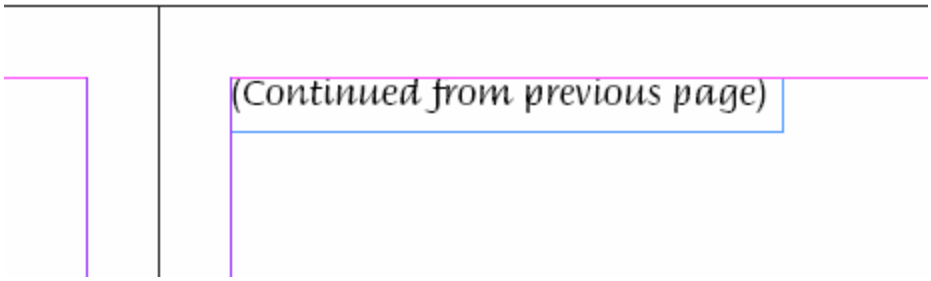
To set up continuation notes in the publication template, follow these steps:

1. If not already present, add a new master spread to the publication template that is dedicated to the continuation notes. This spread be added anywhere, but it is recommended to add it to the end of the template.
2. Draw a text frame at the bottom of the first page of the spread, then add the first continuation note. For example, '(Continued on next page)'.

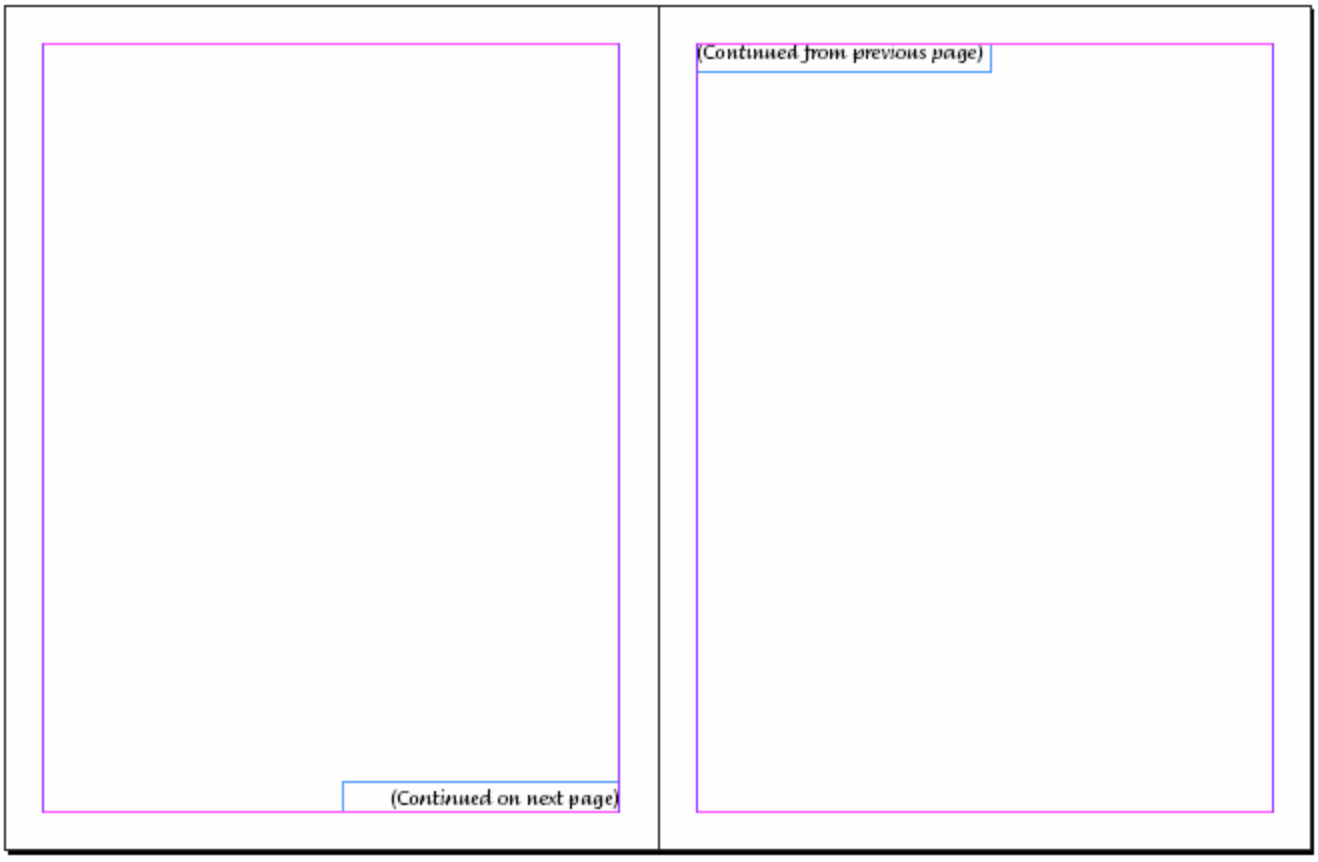
> **Note:** Continuation notes must be placed on the page spread(s), not the master spread(s).



3. Draw a text frame at the top of the second page and add the second continuation note. For example, '(Continued from previous page)'.

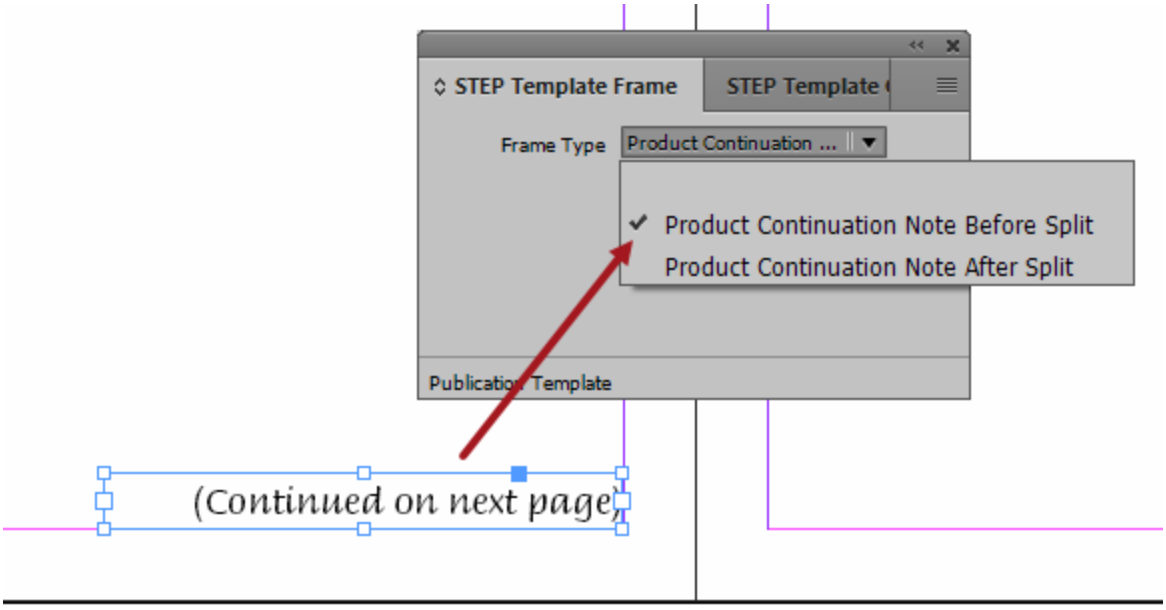


4. The spread will now resemble the following:

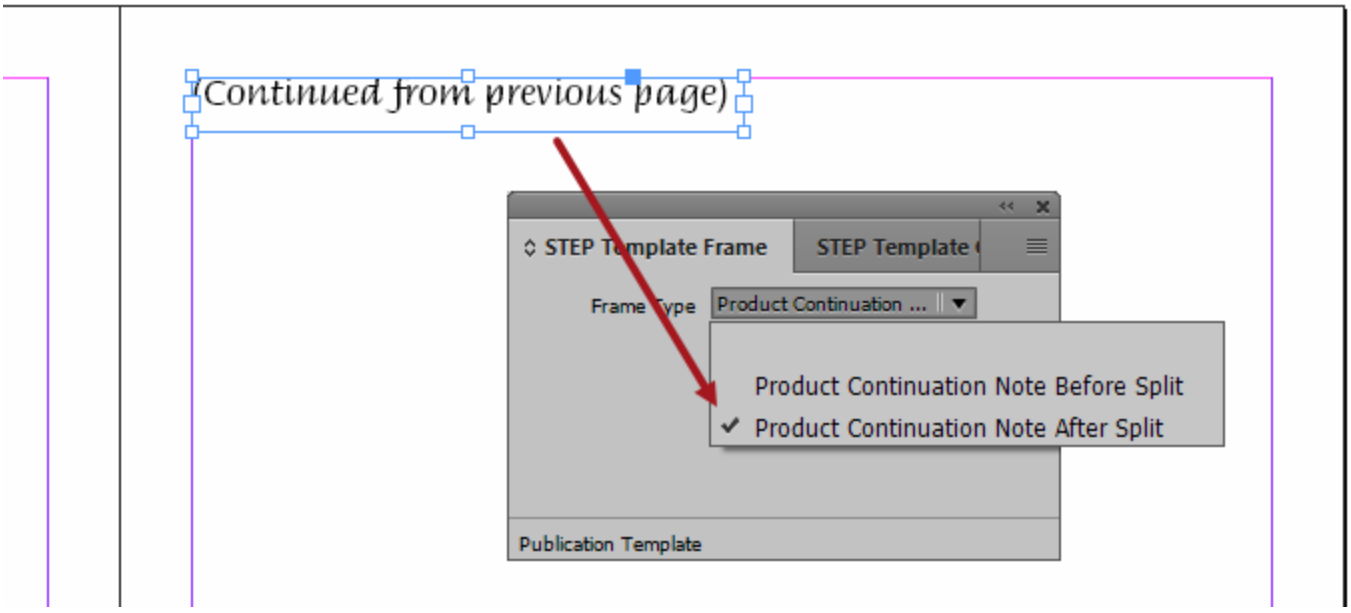


5. Select the text frame on the first page and open the **STEP Template Frame** panel. In the **Frame Type** dropdown, apply **Product Continuation Note Before Split**.

   The 'before split' option is always applied to the frame at the **bottom** of the page. This ensures that the 'continued on next page' note will be mounted below the split product presentation, letting readers know that the rest of the content (for example, a lengthy table) is on the next page.



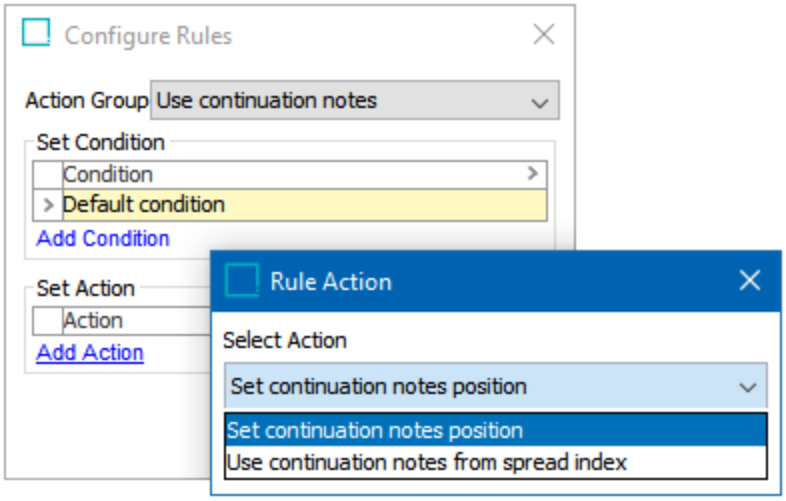
6. With the **STEP Template Frame** panel open, select the text frame on the second page and apply **Product Continuation Note After Split**. The 'after split' option is always applied to the frame located at the **top** of the page. This ensures that the 'continued from previous page' note will be mounted above the remainder of the split product presentation, letting readers know that the content is continued from the previous page.



7. Save the publication template back to STEP, then continue with the configuration of the continuation notes pagination rules.

Configuring Continuation Notes Rules in the AutoPage Publication Planner

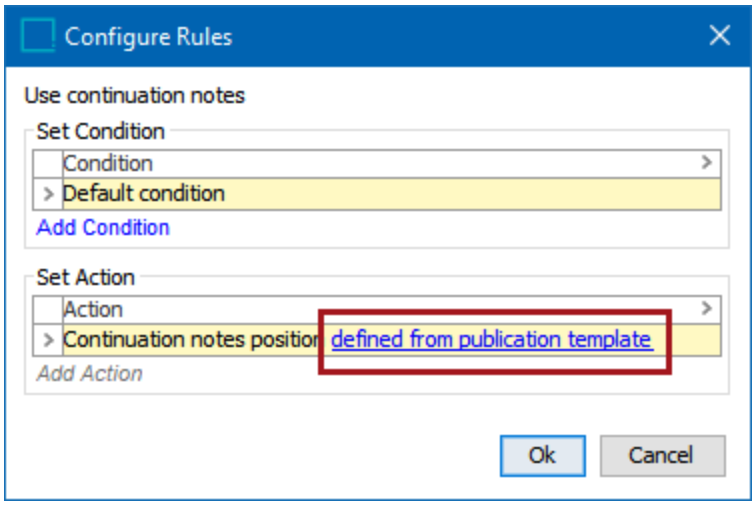
Two actions are available in the 'Use continuation notes' action group—**Set continuation notes position** and **Use continuation notes from spread index**. 'Default condition' is the most frequently used *condition*. Both actions must be configured to mount continuation notes, since the system first needs to know where to place the notes and, second, where to obtain the text.



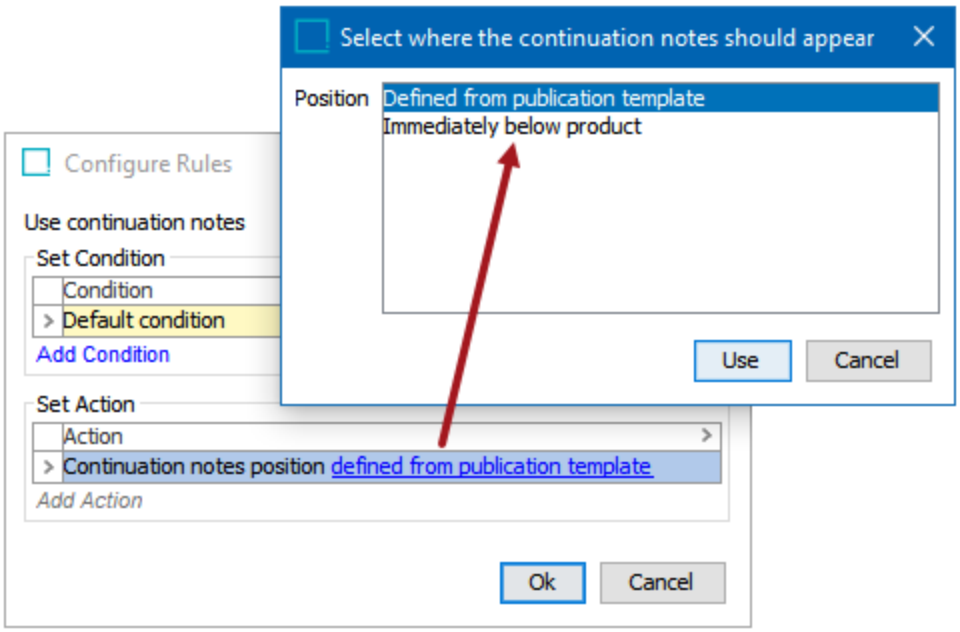
Set continuation notes position

The continuation notes can positioned in the exact location they appear in the publication template, or they can be placed immediately below the first part of the product's split.

1. When 'Set continuation notes position' is selected, the displayed action text is 'Continuation notes position defined from publication template,' which is the default.



2. Click on the hyperlinked 'defined from publication template' text to display the 'Select where the continuation notes should appear' dialog. The available Position options are **Defined from publication template** (default) and **Immediately below product**.

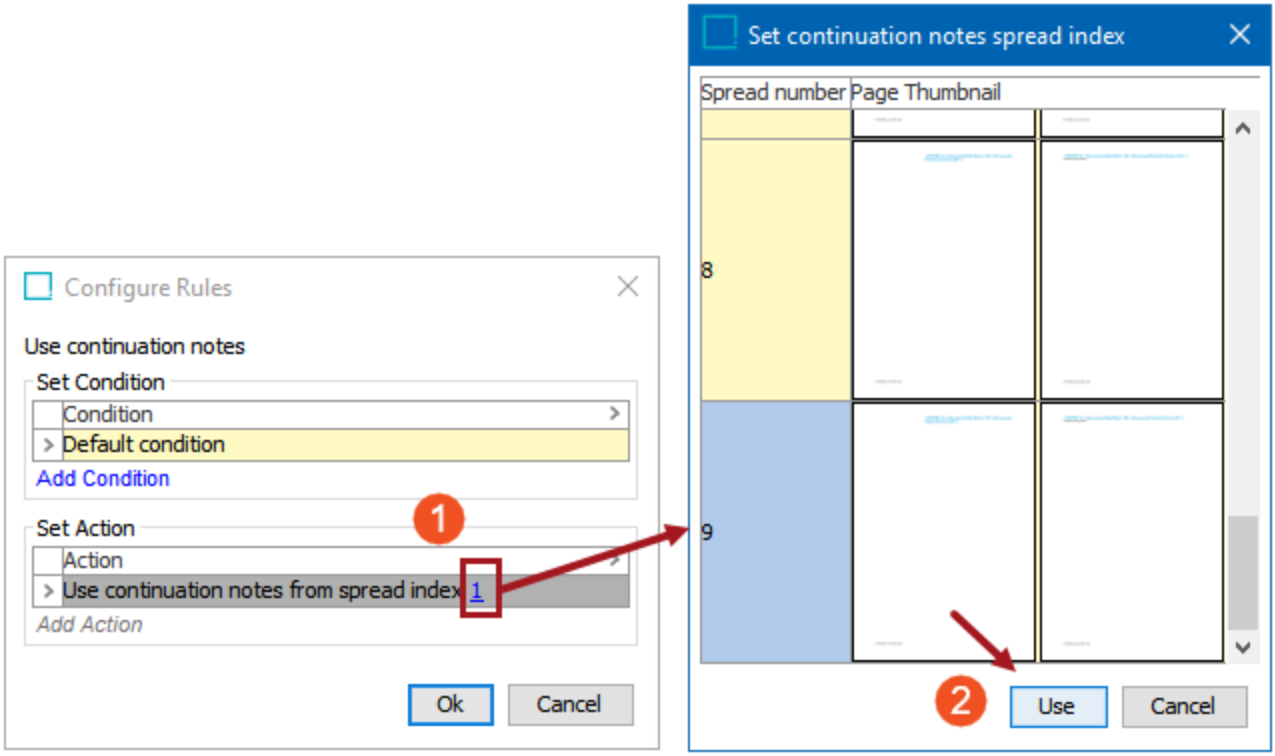


- Choose **Defined from publication template** to have the continuation notes mount in the exact position where they appear in the publication template. For example, the notes will always display at the bottom-right corner of the page even if there is blank space below the split product presentation.
- Choose **Immediately below product** to have the continuation notes mount directly below the split product presentation, even if there is blank space. Even if this option is chosen, the publication template spread index must still be defined from where to pull the continuation notes.

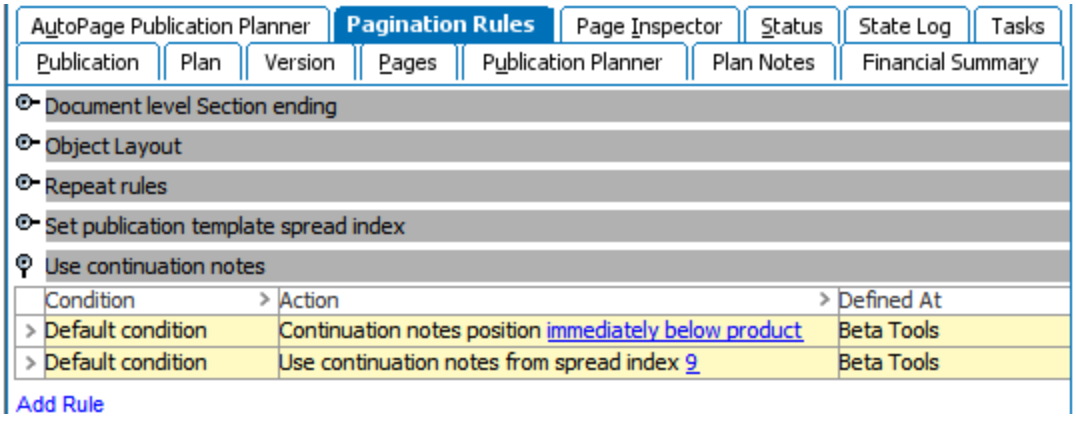
Use continuation notes from spread index

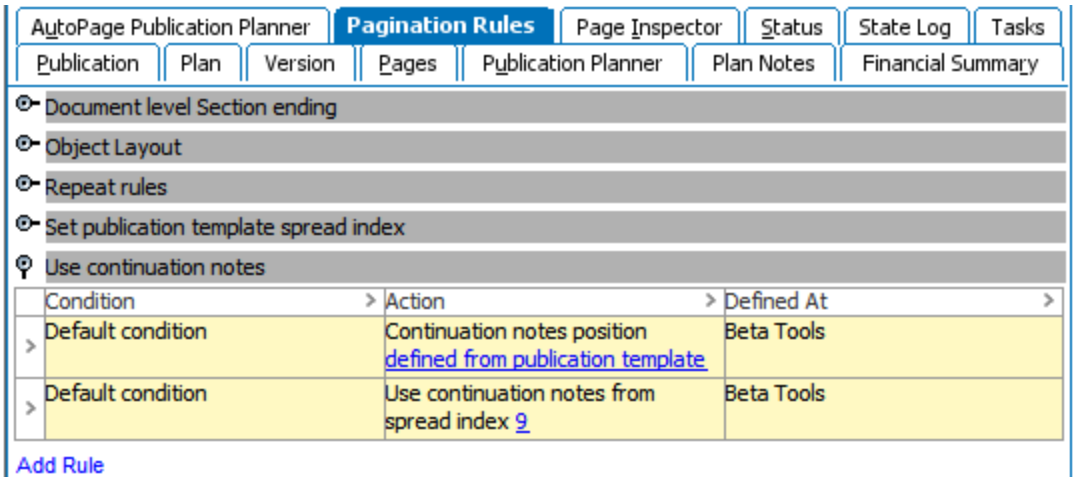
This option tells the system which spread of the publication template contains the continuation note(s).

1. When 'Use continuation notes from spread index' is selected as the action, the action text will include the hyperlinked number '1.' Click on this number to display the **Set continuation notes spread index** dialog.
2. Select the spread that contains the continuation notes, then click **Use**.



3. The configured continuation notes will resemble one of the following:




AutoPage Publication Planner
Pagination Rules
Page Inspector
Status
State Log
Tasks
Publication
Plan
Version
Pages
Publication Planner
Plan Notes
Financial Summary
Document level Section ending
Object Layout
Repeat rules
Set publication template spread index
Use continuation notes
Condition
Action
Defined At
Default condition
Continuation notes position defined from publication template
Beta Tools
Default condition
Use continuation notes from spread index 9
Beta Tools
Add Rule

Autopaginating Pages

This topic describes how to paginate InDesign pages from a publication, section, or subsection, as well as how to choose the desired section level in which to save the final DTP pages.

Prerequisites

- An InDesign server must be set up, running, and connected to your STEP instance
- Products and/or assets and classifications must be linked to the publication, sections, and/or subsections
- A publication template and at least one product template must be linked to the publication
- Pagination rules should be defined for the publication, sections, and subsections
- Layers should be mapped if the publication has multiple versions

About the Autopagination Process

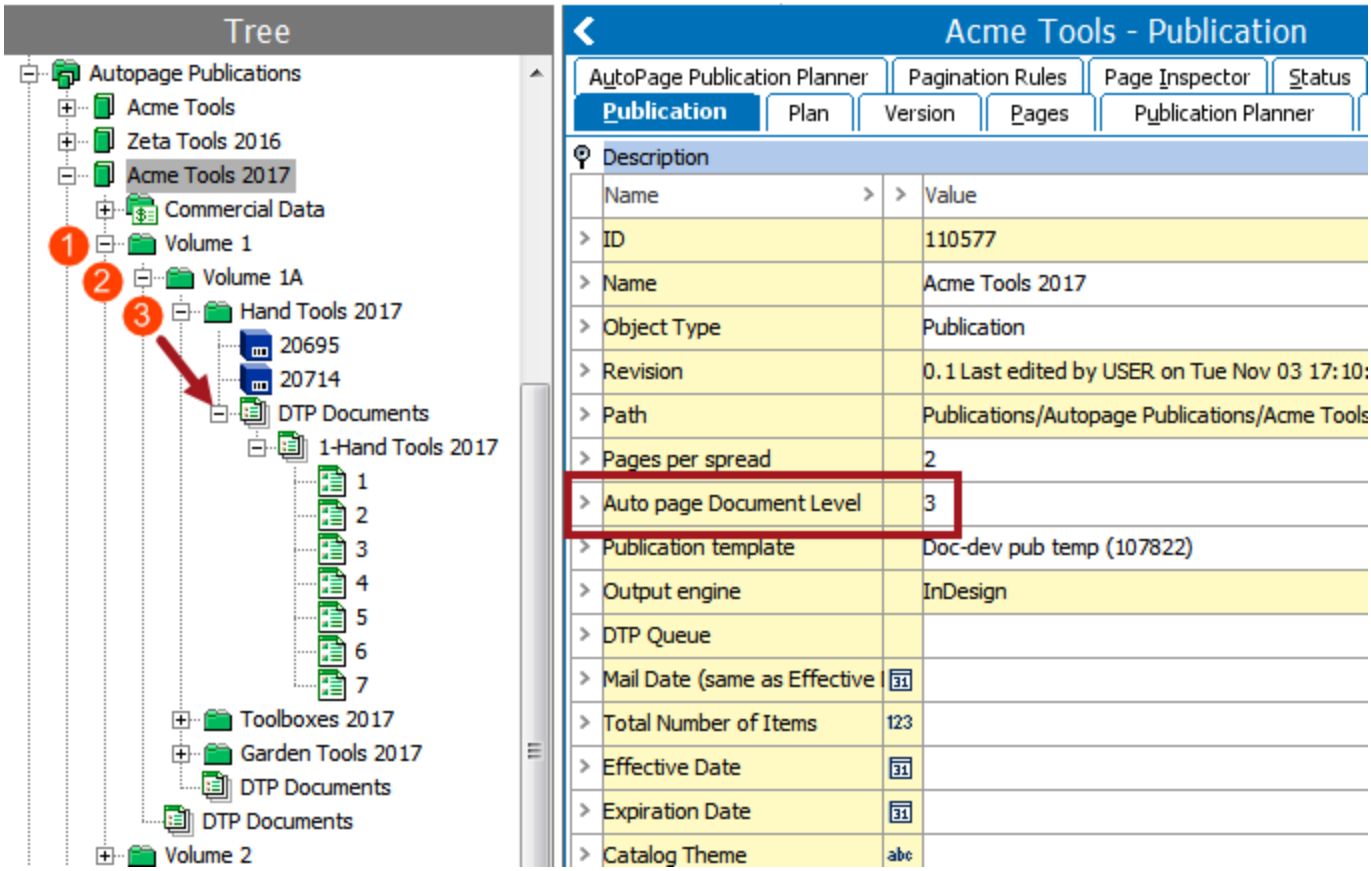
After selecting, linking, and sequencing the objects in your AutoPage publication, it is ready for autopagination. You can paginate an entire publication or only parts of a publication, such as a version or a section.

You can paginate one or all versions of a publication. When you paginate all versions of a publication at the same time, the different versions will be part of the same document but in different layers. Therefore, you have to define layer mappings on the publication. The layer mappings specify how layers from the product template are mapped to the layers in the actual InDesign document. For more information about layer mapping, see **Mapping Versions to Layers** in the **STEP Publisher** documentation.

Every object is measured and space is allocated for the longest version on all layers. As a result, every product presentation element starts on the same position in all versions. The product presentations that you select for a multi-version AutoPage publication must be the same in the different versions.

Specifying the Document Save Location

Autogenerated DTP documents are saved under the section level based on the 'Auto page Document Level' that has been set on the publication. For example, If this has been set to '3' then the pages will be saved under the third-level sections, as pictured in the below screenshot.



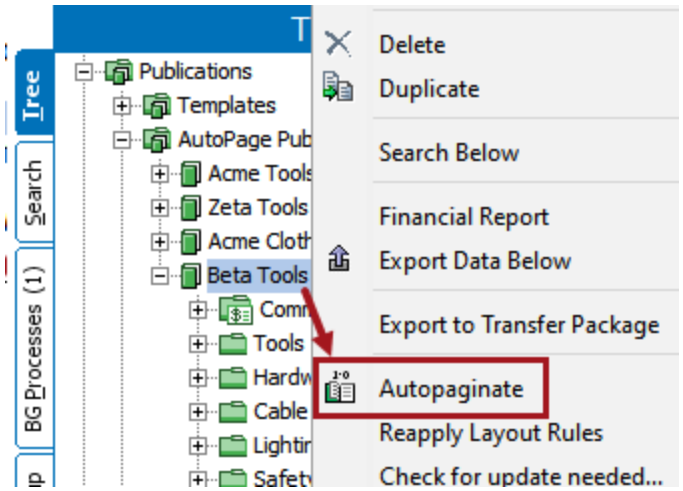
Note: If the publication structure contains products on each level, then you cannot select that level as a storage point for your DTP documents.

Example: You have a publication that has section (Level 1), subsection (Level 2), and another subsection (Level 3) under it. If you are going to add products under Level 1 then you will be unable to choose 3 under 'Auto page Document level.' The storage level will be restricted to '1,' which means that the DTP documents will be stored under Level 1.

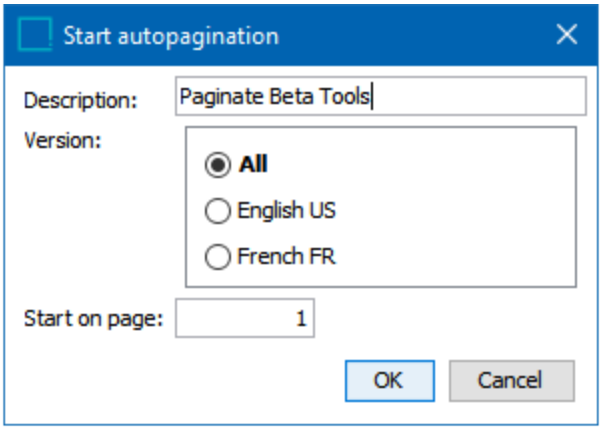
If you are going to add the products only from Level 3 onwards in your publication, then you will be allowed to set this to 3 and the DTP documents will be created and stored under Level 3, as illustrated in the previous image.

To Start the Autopagination Process

1. In the Tree, select and right-click on the publication, section, or subsection that you want to paginate, then click **Autopaginate**.



2. In the 'Start autopagination' dialog, select the **version** you want to paginate, then enter the page number in **Start on page** where you would like the autopaginated pages to begin. Click **OK**.



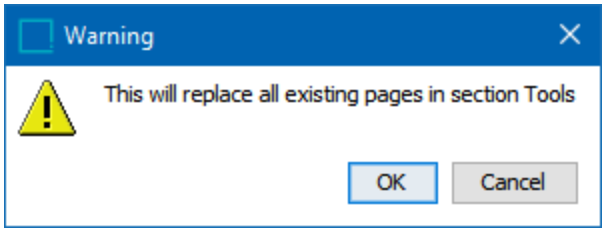
3. In the 'Starting process Paginate' dialog that displays, click **Close** or **Go to process**. 'Go to process' takes you to the 'Autopage Batch Service' on the **BGProcesses** tab.

The actual pagination is carried out by the InDesign server. A pagination request calls the InDesign server via the background process and starts the pagination process. The InDesign server then carries out page pagination based on the applied publication template and pagination rules. When completed, the InDesign server saves the paginated pages back to STEP in the **DTP Documents** node under the section level designated in 'Auto page Document Level.'

After the pages are saved to STEP, you can view them in the Page Inspector. For more information, see the **Page Inspector** topic.

Repaginating Pages

If the autopagination process is initiated on a section that already contains DTP documents, a warning dialog displays to inform users that all pages in the section will be replaced. This dialog does not display if the autopagination is re-initiated from a higher section level that does not itself contain DTP pages. I.e., if section level 1 contains no pages but section level 2 does, the warning will only display when autopagination is re-run from a section level 2.



Inspecting and Updating Pages

Once paginated DTP pages have been saved back to STEP, the pages can be both inspected and updated within the workbench from the **Page Inspector** and the **AutoPage Publication Planner** tabs. Both single and multi-version publications can be actioned from these locations.

Page Inspector

From the Page Inspector, actual pages can be viewed and edited from within the workbench. Mounted objects can be repositioned, remounted, and reflowed on a page; content can be updated; documents can be opened directly in InDesign; layouts can be locked; pages can be sent to the printer; and more.

For high-level information on the Page Inspector and its interface, see the **Page Inspector** topic.

For information on how to view markers for product borders, measurements, oversets, layout source, and update needed, see **Viewing Markers and Overset Text**.

For information on how to reposition objects on pages and manually set object justification, see **Repositioning Objects in the Page Inspector**.

AutoPage Publication Planner

From the AutoPage Publication Planner, actual pages are not viewable, but multiple actions can be taken on pages within the publication, including:

- Resequencing objects. See **Resequencing Linked Objects in AutoPage Publications**.
- Check if an update is needed and update content. See **Updating Documents in AutoPage**.
- Set page numbers. See **Controlling Page Numbers**.
- Create a PDF. See **Generating PDFs in AutoPage**
- Create an AutoPage Planner report. Information is available in the **AutoPage Publication Planner** topic.

Actions Available in Both the Page Inspector and AutoPage Publication Planner

The following actions are available from both the Page Inspector and the AutoPage Publication Planner tabs.

- Remount and reflow objects. See **Remounting and Reflowing Objects**.
- Update documents. See **Updating Documents in AutoPage**.
- Print pages or sections. See **Printing Pages in AutoPage**.

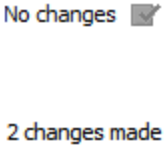
Page Inspector

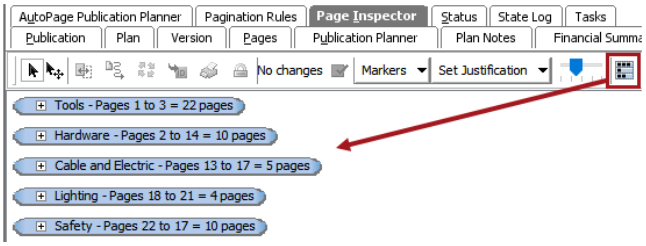
The Page Inspector is a tool in the STEP Workbench used for viewing and editing InDesign pages generated through AutoPage. From the Page Inspector, mounted objects can be repositioned, remounted, and reflowed on a page; content can be updated; documents can be opened directly in InDesign; layouts can be locked; pages can be sent to the printer; and more. To view the Page Inspector, select the relevant publication, section, or subsection in the Tree, then click the **Page Inspector** tab.

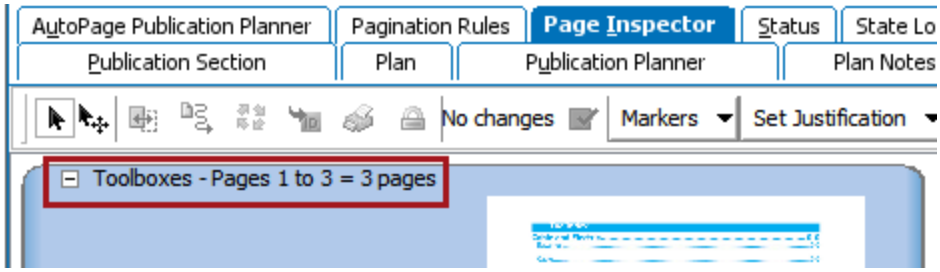
Overview of the Page Inspector Interface

The following screenshot shows an example of an autopaginated catalog spread as viewed in the Page Inspector. The toolbar at the top of the Page Inspector contains the tools that can be used on the mounted objects and pages. The numbers in the following screenshot correspond with the numbered entries in the table directly below it.

No.	Tool	Description
1	Selection	Using this pointer, single-click on a product or page to select it. Double-click to go to that object in the Tree hierarchy. To select multiple objects, hold down the CTRL key when making selections.
2	Positioning	Change the position of objects on a page. After moving an object, the 'No Changes' button (9) indicates the number of changes made. Click **Apply Changes** for the changes to take effect.
3	Remount objects	Remount one or more objects at a time. For more information, see **Remounting**

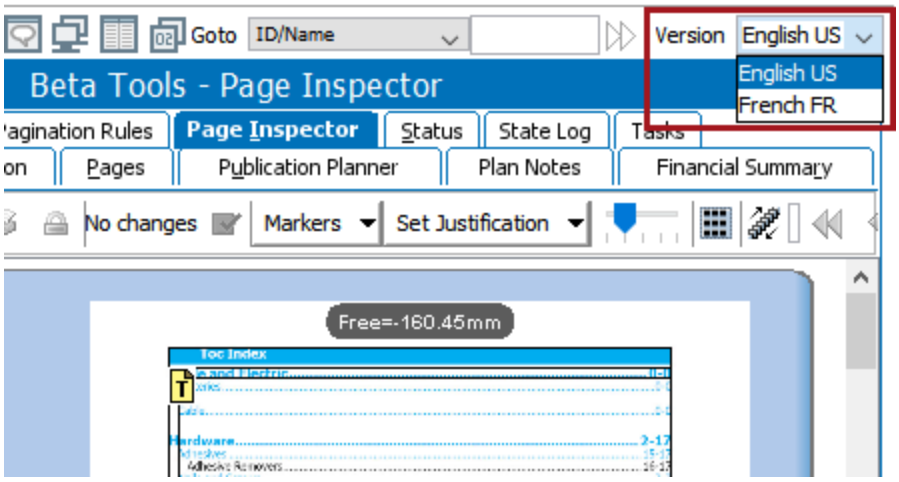
No.	Tool	Description
		and Reflowing Objects.
4	Reflow objects	Reflow objects from the selected object until the end of a page or the end of a section. For more information, see **Remounting and Reflowing Objects**.
5	Update content	Update the product content. You can either update the entire content of one or more selected objects, or you can update specific items such as attributes, commercial terms, image references, and object names. For more information, see **Updating Documents in AutoPage**.
6	Open document in InDesign	Open a document in InDesign. You can manually make edits to the document in InDesign, then save it back to STEP from within InDesign. For more information, see the **Saving Finalized InDesign Documents to STEP** section of the **STEP Publisher** documentation.
7	Print	Print sections, subsections, or pages. For more information, see **Printing Pages in AutoPage**.
8	Lock layout	Remembers a product presentation layout while you are using autopagination, reposition, remount, or reflow. Select the changed product presentation and click the **Lock Layout** icon. Locked layout only concerns the product presentation layout and has nothing to do with the position on the page.
9	No changes / changes made 	Indicates the number of changes that have been made with the Positioning Tool (2). Click the checkbox ☑ to apply the changes. The text 'No changes' will display until a change has been made. For more information, see **Repositioning Objects in the Page Inspector**.
10	Markers	Select a marker to view detailed information about the mounted objects. For more information, see **Viewing Markers and Overset Text**.

No.	Tool	Description
11	Set Justification 	Justification options are enabled when a page is selected. The available options are Justify Top, Justify Bottom, and Justify Balance. For more information, see **Repositioning Objects in the Page Inspector**.
12	Zoom slider 	Use the slider to zoom in to get a close-up view of a page or zoom out to see more of the page.
13	Hide / show subsections 	Select whether to show or hide subsection titles. Subsection titles indicate the start of a new subsection. Subsections hidden: Subsections shown:  By default, subsections display as expanded. The subsections have been collapsed for this illustration.
14	Specify number of pages to be shown 	Show all pages or specify a page range to be shown. The default is to show all pages.
15	Page range options 	Specify the start and end page of a page range. This option is only enabled if **Show a page range** is used. The navigation arrows show the following.

No.	Tool	Description
		First page range in section Previous page range Next page range Last page range in section
16	General section information	Displayed in the upper left corner of the interface are: • Section / subsection name • Page numbers within the section (e.g., Pages 1 to 3) • Total numbers of pages within the section (e.g., 3 pages) 

Inspecting Multi-version Publications in the Page Inspector

While in the Page Inspector, to view a different version of your publication, select the relevant version from the **Version** dropdown in the upper-right corner of the STEP GUI. This dropdown is not a part of the Page Inspector toolbar, but is a part of the STEP Workbench interface that is visible when viewing most publication hierarchy objects.

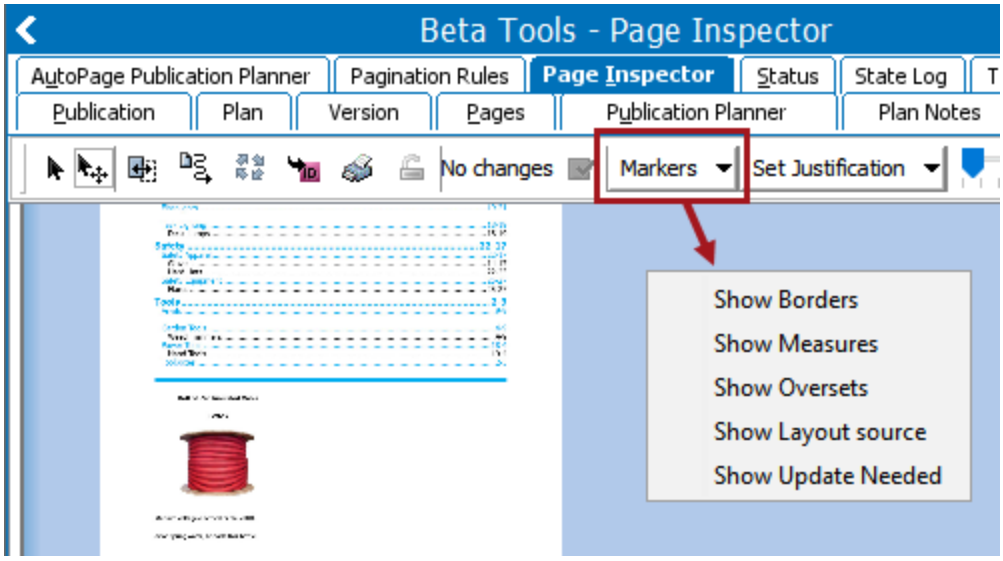


Note: When you apply any of the following actions—Remount, Reflow, Update content, Apply changes, or Justification—they apply to all versions of a publication, not just the selected version.

Viewing Markers and Overset Text

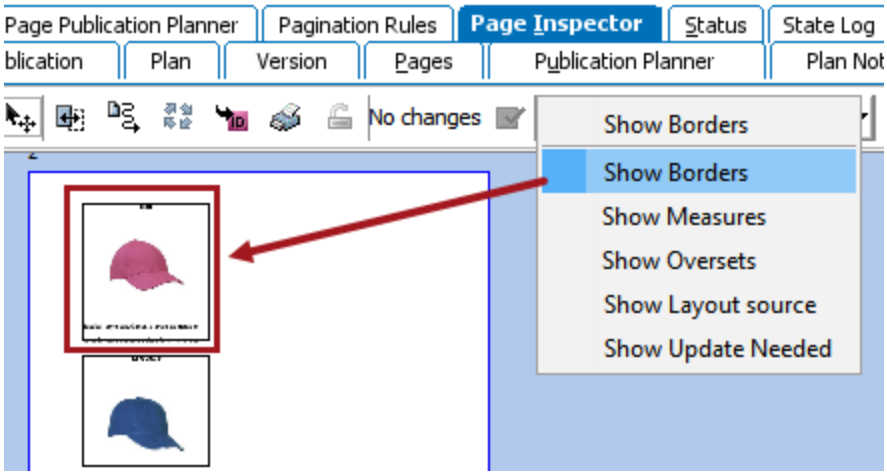
When inspecting pages in the Page Inspector, markers provide information about the products mounted to the page. Click **Markers** to view the list of available markers that can be placed onto the mounted objects. The following options are available:

- Show Borders
- Show Measures
- Show Oversets
- Show Layout source
- Show Update Needed



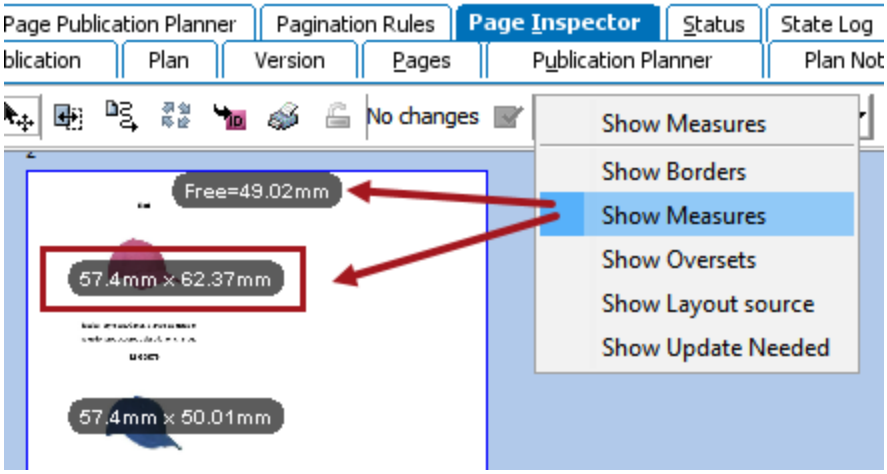
Show Borders

Places a black frame around each object to show the borders of a product presentation.



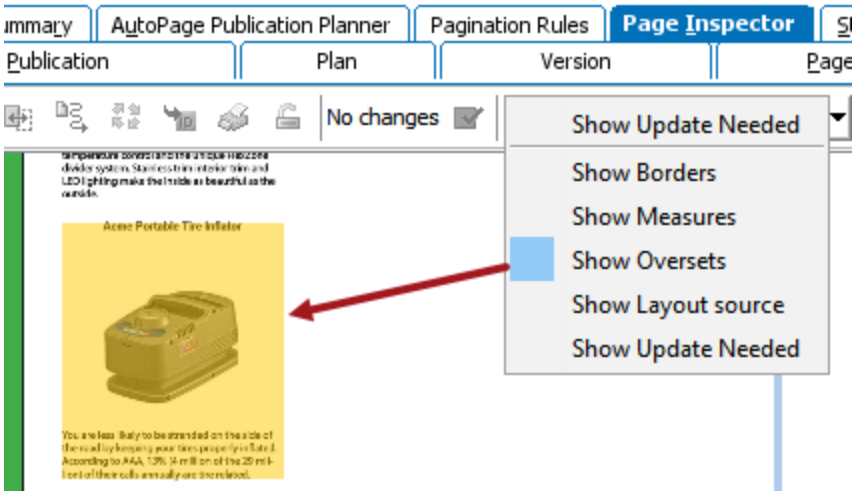
Show Measures

Shows the width and height of a product presentation, as well as the free space left on a page.

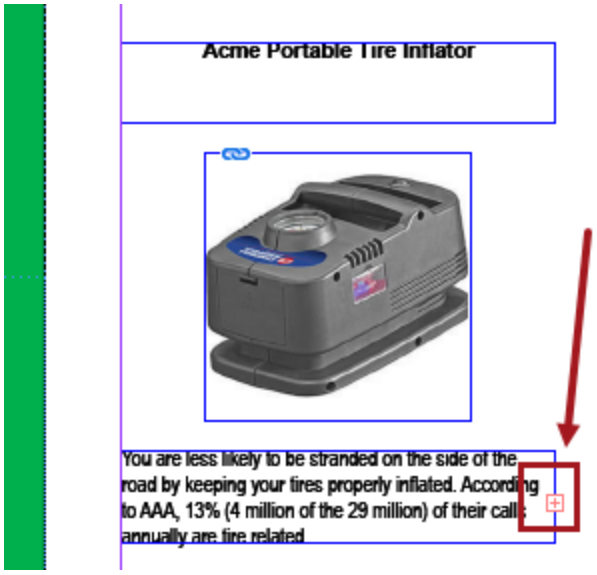


Show Oversets

Shows which paginated objects contain overset text. The objects are highlighted in yellowish orange.

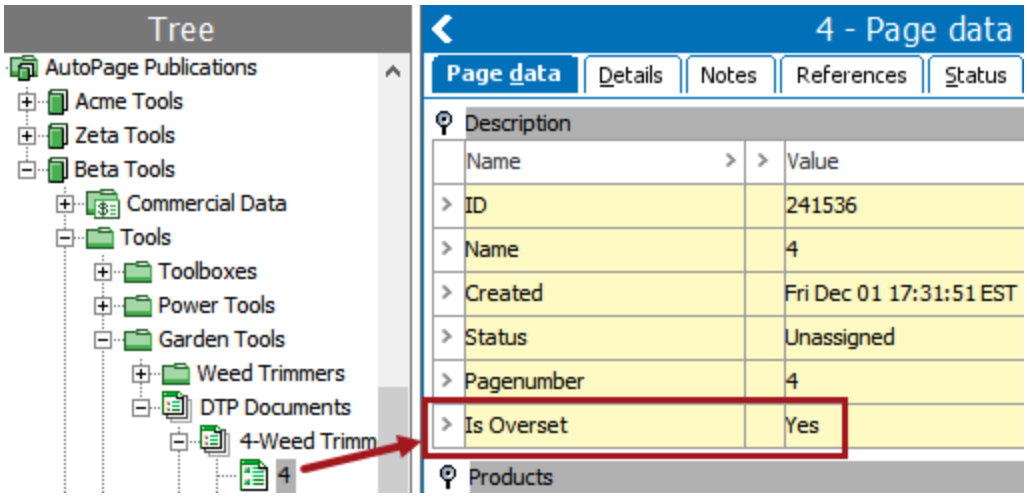


Overset means that there is too much text to fit in the visible frame on the InDesign page. The object will need to be remounted to resize the frame so it will accommodate all of the text. The following screenshot shows what the overset text frame looks like on the InDesign page, as indicated by a square with a red cross in the middle.



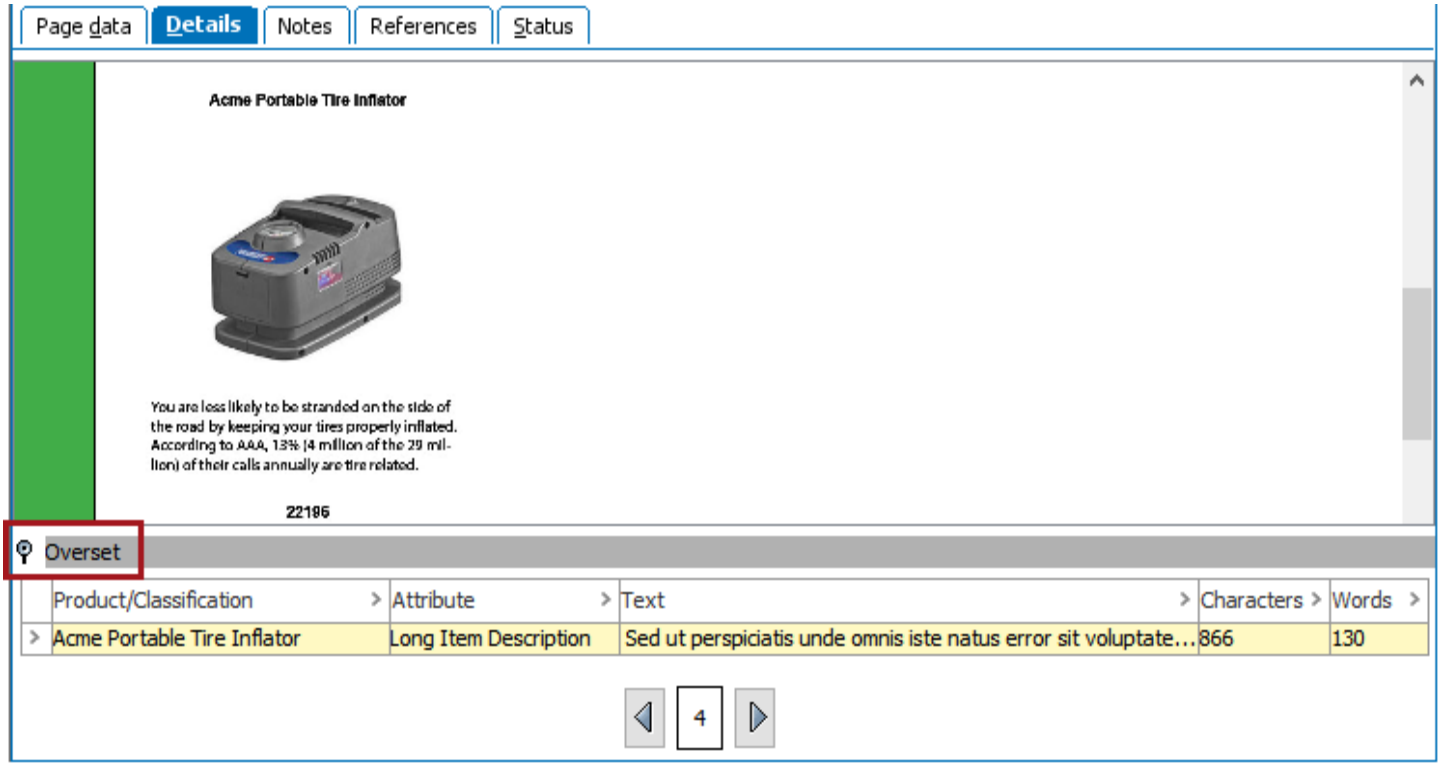
Viewing Overset Text in the Workbench

1. Double-click the white space of the page that contains the mounted object with oversets. The workbench will route to the DTP page in the **Tree**.
2. On the **Page data** tab, if there is any overset text on the page, the value of **Is Overset** will be 'Yes.'

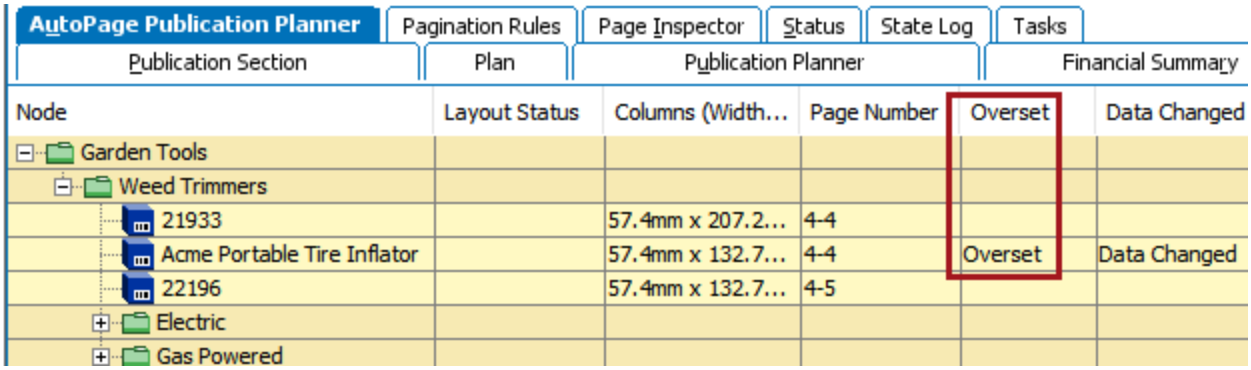


3. On the **Details** tab, expand the **Overset** flipper below the page. The following information about the overset is displayed:

   - The mounted product / classification object that contains the overset text
   - The attribute that contains the overset text
   - The text where the overset begins
   - The number of characters in the overset text
   - The number of words in the overset text



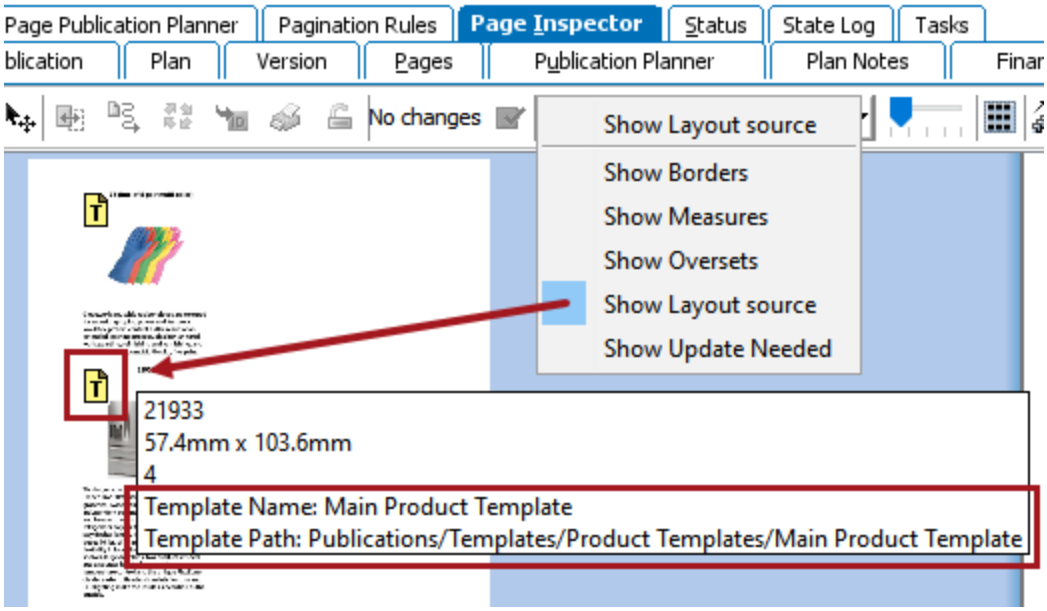
4. Information about overset text can also be viewed on the Publication Planner tab. If there are any oversets, they are listed in the **Overset** column.



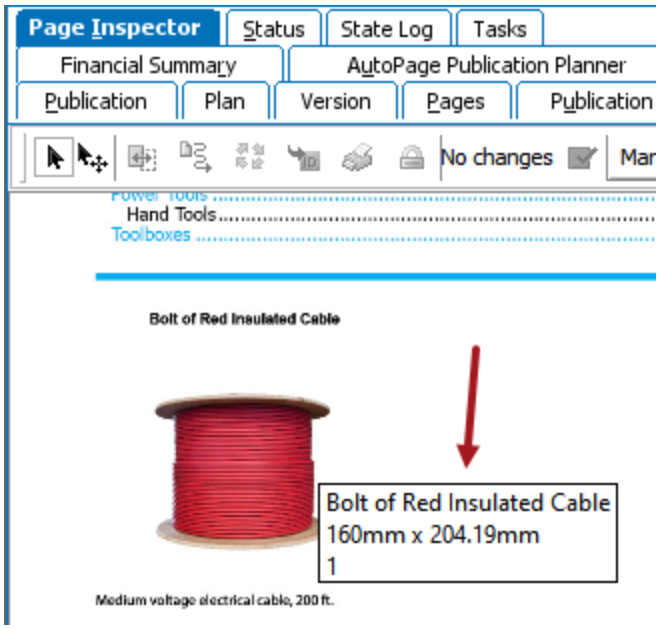
5. To resolve the overset text, remount the object. See the **Remounting and Reflowing Objects** topic for more information.

Show Layout Source

Shows the name of the product template and the STEP path where the template can be found. If the product is mounted with an existing layout that is picked up from another publication, this is also shown. Hover the mouse over the layout symbol to view details about the product template.

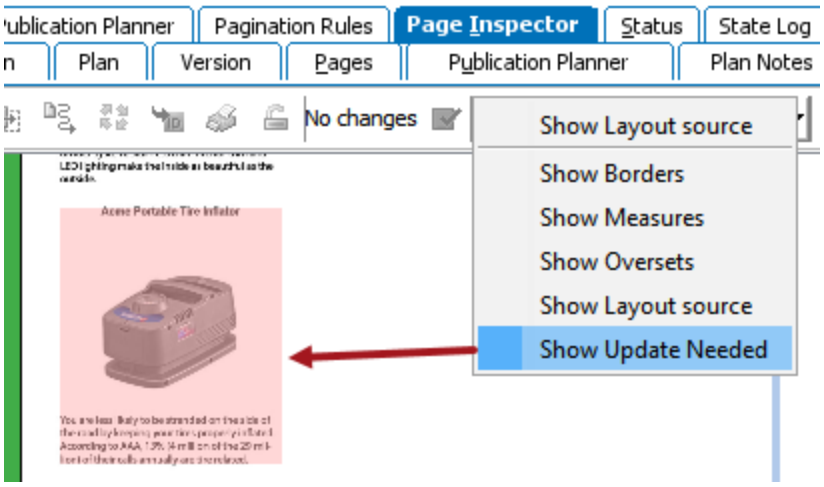


Note: Without 'Show Layout source' selected, hovering your mouse over a mounted object will still display a limited amount of information—the object name, dimensions of the mounted object, and the page number the object appears on. However, 'Show Layout source' must be selected to view product template information.



Show Update Needed

Indicates if the product data has been updated in STEP since the product was mounted on the page. The objects are highlighted in light red.



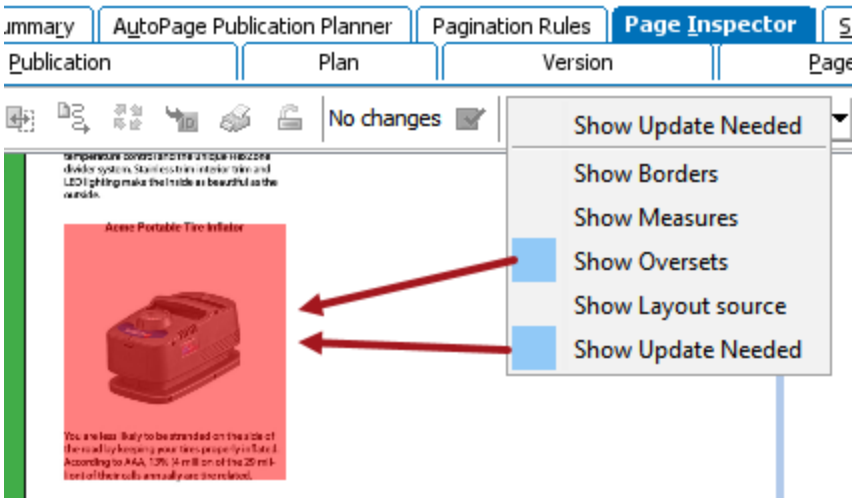
Objects are only highlighted if you have already run a **Check for update needed** operation on the relevant publication group, publication, section, or DTP document. For information on how to run a check for needed updates, see the **Updating Documents in AutoPage** topic. For information on how to check for needed updates using bulk update functionality, see the **Publishing: Check Publication Document for Needs Update Operation** topic in the **Bulk Updates** documentation.

Selecting Multiple Markers

Multiple markers can be activated on the page at the same time.

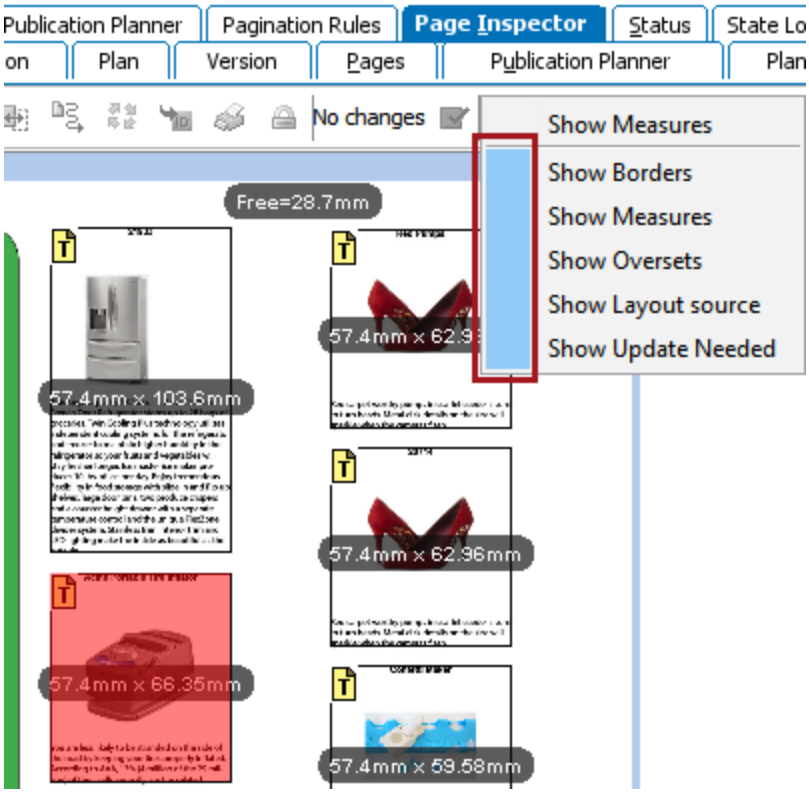
Overset & Update

If an object is both overset and needs update, and both markers are shown, the object is highlighted in red. Both markers must to be turned on to see the red color.



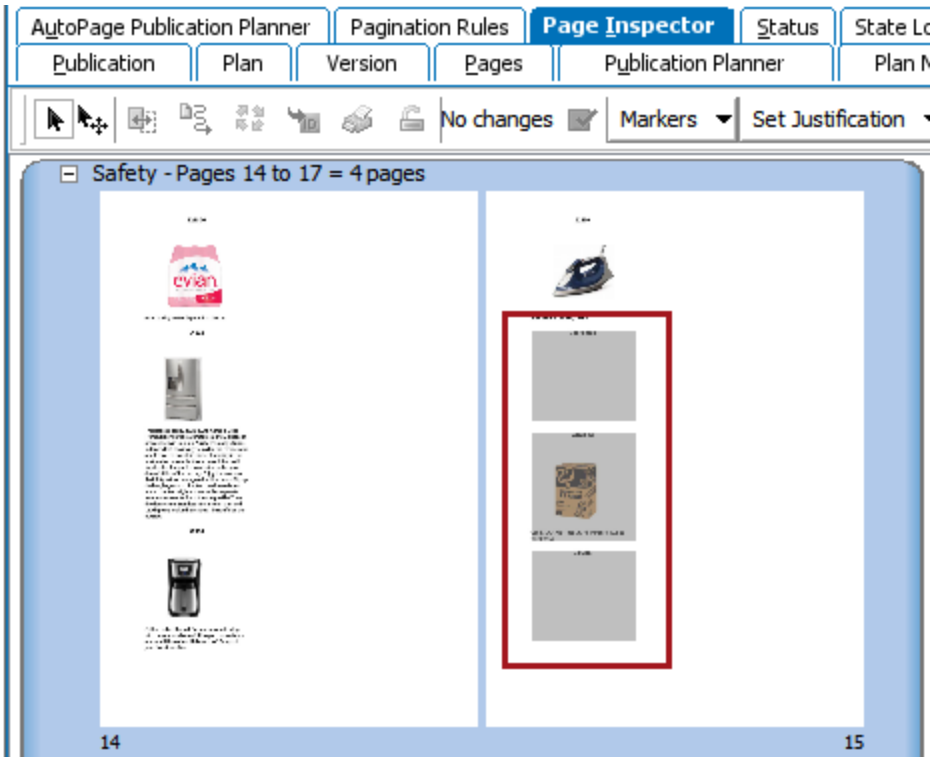
All Markers

The following screenshot shows a sample page with *all* markers activated.



Gray Boxes in the Page Inspector

Though not technically considered a marker, gray boxes sometimes display on mounted objects in the Page Inspector.



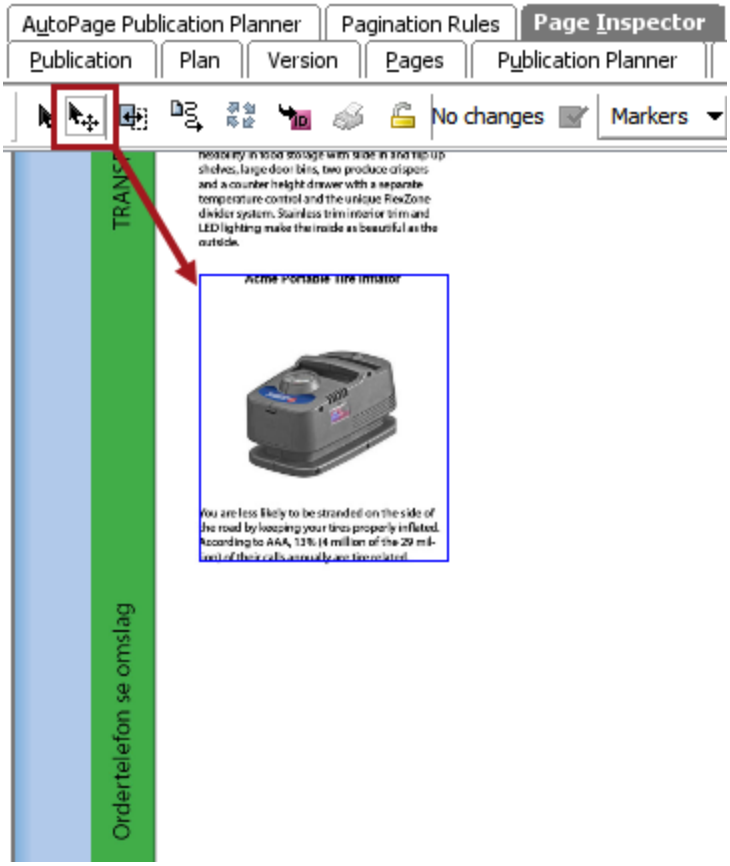
These gray boxes appear because the same page can be visible in two subsections if the mounted page contains objects from both subsections. The objects that do not belong to the selected subsection are displayed in a gray box. Also, because the page belongs to two different subsections, it is displayed twice in the Page Inspector.

Repositioning Objects In the Page Inspector

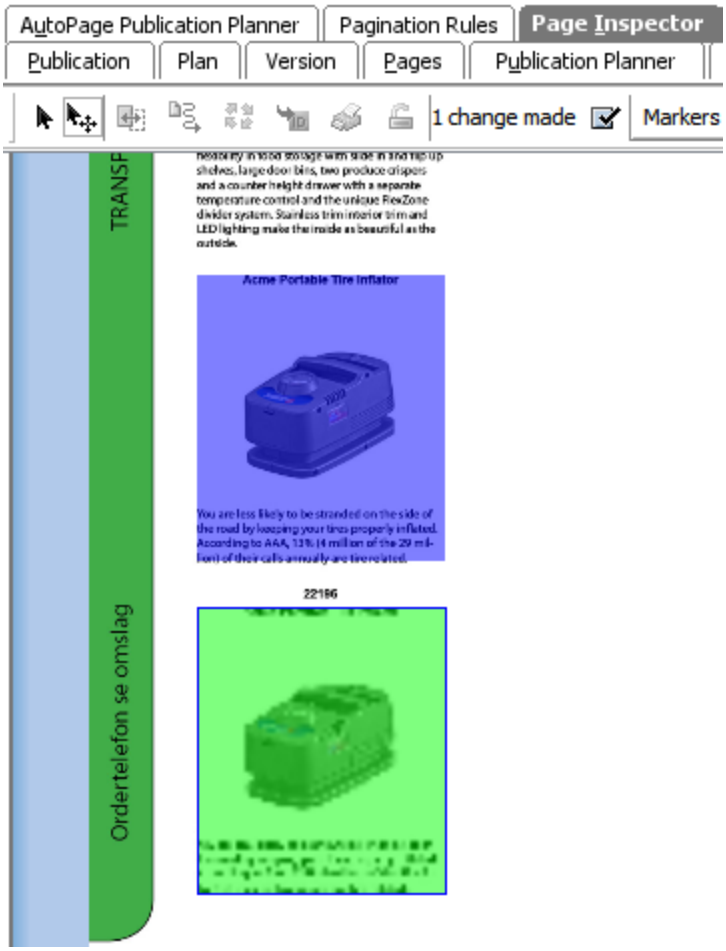
Objects can be repositioned on InDesign pages within the workbench through the interface of the Page Inspector. This allows for users to update page layouts without having to go into InDesign.

Note: If you want to change the order of the objects, and not reposition them, they must be resequenced instead. See **Resequencing Linked Objects in AutoPage Publications** for more information.

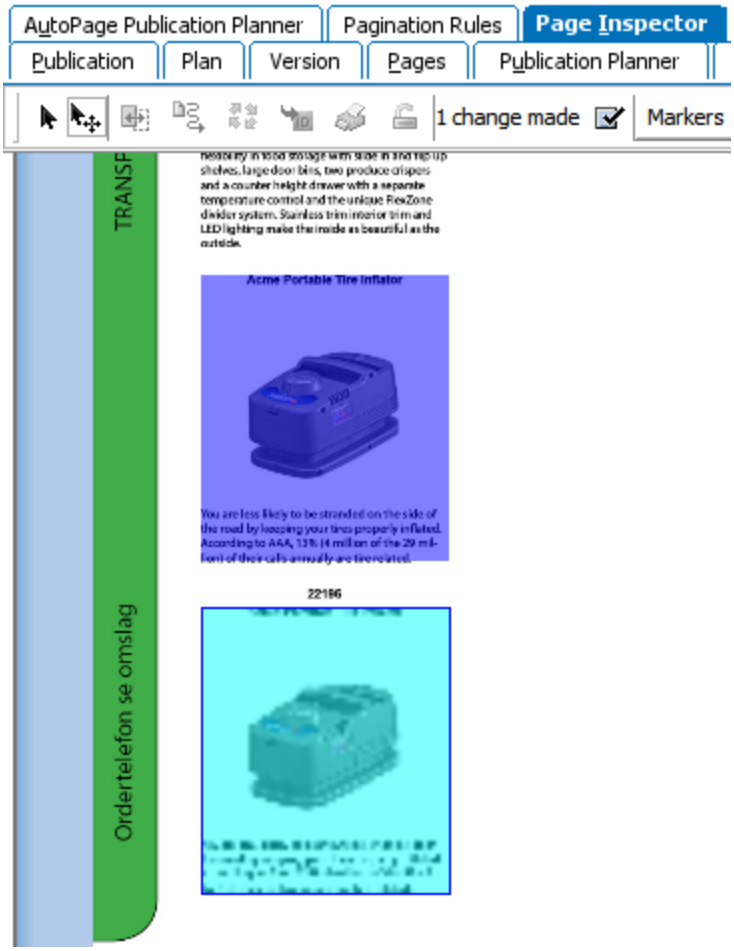
1. In the **Tree**, click the relevant section or subsection.
2. On the **Page Inspector** tab, click the **Positioning** tool, then select the object that you want to reposition. a blue border displays around the selected object.



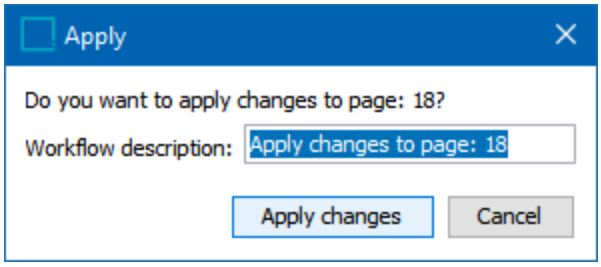
3. Drag and drop the object to its new position. The new position is highlighted in green, and the object's former position is highlighted in blue.



- If the Show Oversets / Show Update Needed markers have been selected and the repositioned object is overset or needs to be updated, the object is highlighted in cyan instead.



4. The **Apply changes** button (1 change made)indicates the number of objects that have been repositioned. Click the 'Apply changes' checkbox for the new position to take effect. If you have only made one change, the system makes the change immediately. Otherwise, a background process is started.



Set Object Justification

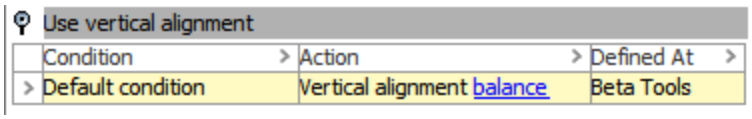
Objects can be justified on a page from within the Page Inspector.

While in the Page Inspector, select either a product, multiple products (by holding the CTRL or Shift key while making selections), or a page, then click **Set Justification**. The following options are available:

- **Justify Top**: repositions the selected objects at the top of the page
- **Justify Bottom**: repositions the selected objects at the bottom of the page
- **Justify Balance**: repositions the selected objects so that the white space between the objects is distributed evenly

Setting Object Justification on an Entire Publication

To set the justification on an entire publication at once, set a 'Use vertical alignment' pagination rule. The available options are top, bottom, and balance. For more information, see **AutoPage Pagination Rule Actions**.



Remounting and Reflowing Objects

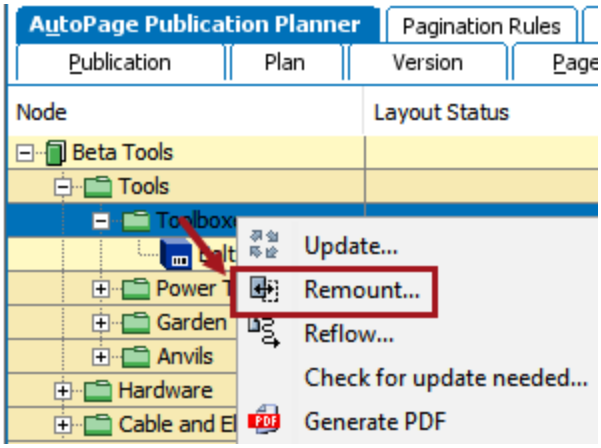
Pages can be remounted and objects can be reflowed from either the **Page Inspector** or the **AutoPage Publication Planner**.

Remount Objects

One or more objects at a time can be remounted on autopaginated pages. This is useful, for example, if you have made changes to the product template, if you want to resolve overset text, or if the product content has been changed.

1. In the Tree, select the relevant publication, section, or subsection.
2. If using the **Page Inspector**, select the relevant objects or pages that you want to remount (press and hold the CTRL key to multi-select objects or pages), and then click the **Remount** icon .

3. If using the **AutoPage Publication Planner**, select the section or objects that you want to remount, right-click, and then select **Remount**.



4. If only one object is selected, the system makes the change immediately. Otherwise, the system starts a background process.

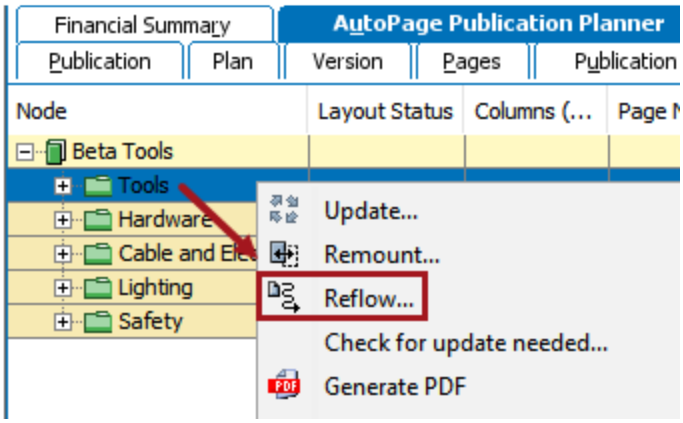
Reflow Objects

Objects can be reflowed until the end of a page or the end of a section. This is useful if you want to optimize a limited number of pages; for example, if you have removed an object or have resequenced objects. In this case, it is recommended to run a reflow operation instead of a complete autopagination.

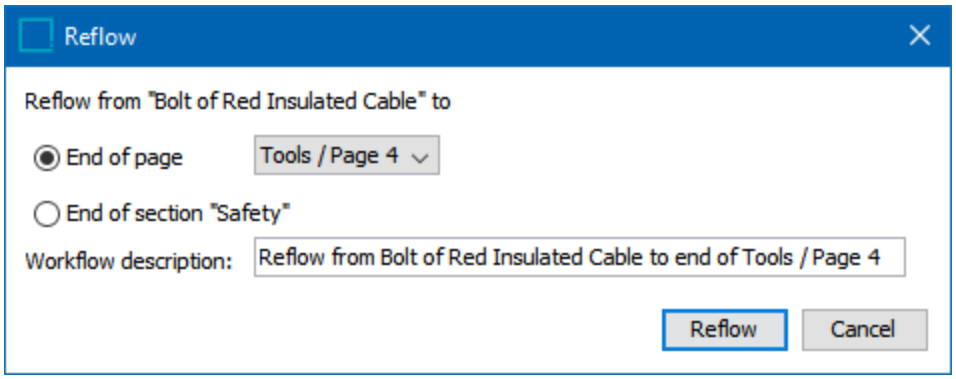
Note: If you have added objects, new spreads will be added either at the end of the indicated page or at the end of the indicated section.

1. In the Tree, select the relevant publication, section, or subsection.
2. If using the **Page Inspector**, select the relevant object or page, then click the **Reflow** icon .

3. If using the **AutoPage Publication Planner**, select the relevant sections or objects, right-click, then choose **Reflow**.



4. In the Reflow dialog, select either 'End of page' or 'End of section,' then click **Reflow**.


Reflow
Reflow from "Bolt of Red Insulated Cable" to
End of page
Tools / Page 4
End of section "Safety"
Workflow description:
Reflow from Bolt of Red Insulated Cable to end of Tools / Page 4
Reflow
Cancel

Controlling Page Numbers

To ensure consecutive page numbering in sections, the starting page number can be specified, as shown in the following example:

Section 1: pages 1 - 10

Section 2: pages 11 - 20

Section 3: pages 21 - 30

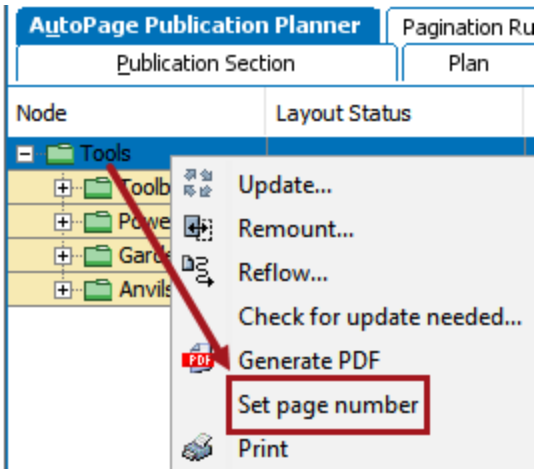
Important: This may result in page swap from left to right pages or vice versa. When swapping pages, it might require all pages to be remounted, if there are left and right hand page specific pagination rules. If a remount is required, all changes applied manually to the actual pages are lost.

Control Page Numbers

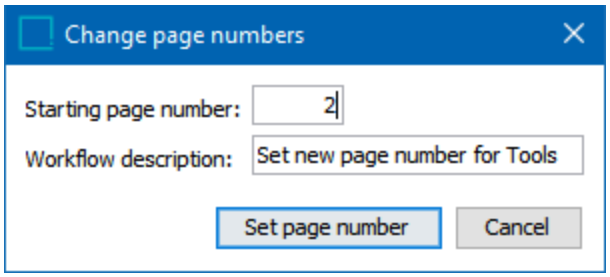
1. In the Tree, click the relevant publication, section, or subsection.
2. Click the **AutoPage Publication Planner** tab, then select the publication, section, or subsection for which you want to set page numbers.

   Note: It is recommended to set the page numbers at the section level.

3. Right-click, then select **Set page number**.

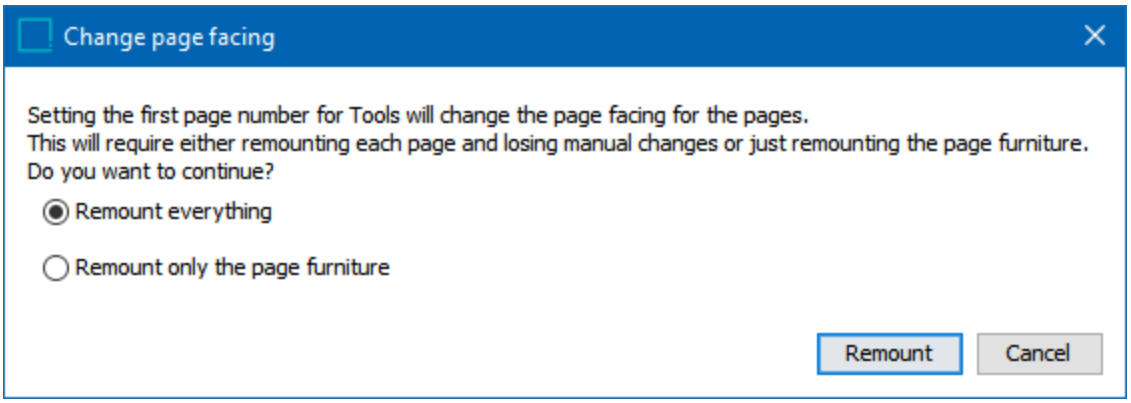


4. In the 'Change page numbers' dialog that displays, type a number into the 'Starting page number' field, then click **Set page number**.



5. When page numbers are changed, it may result in page swap from left to right or right to left. If this is the case, the **Change page facing** dialog is displayed. Select either 'Remount everything' or 'Remount only the page furniture,' then click **Remount**.

   Page furniture is another term for the background elements in a publication template, such as the page numbers.



   If different pagination rules exist for left and right pages, it is recommended to choose **Remount everything**. This causes all pages to be remounted, but note that all manual changes made to actual pages will be lost. To only remount the publication template elements ('page furniture'), choose **Remount only the page furniture**.

6. In the 'Starting process Set new page number' dialog that displays, click **Close** to close the dialog. Click **Go to process** to be routed to the Autopage Batch Service on the **BGProcesses** tab.
7. A request is sent to the InDesign server to update the page numbers of the actual pages in the section. The InDesign server saves new versions of the documents to STEP.

Updating Documents in AutoPage

One advantage of using AutoPage to automate page building is the ability to automatically update the contents of previously built pages without having to rebuild them from scratch.

When pages are built using AutoPage, the content placed from STEP onto the pages accurately reflects how the content existed in STEP at that moment in time. If changes are made later to the corresponding content in STEP (for example, attribute values or referenced images), the pages become out of sync with the latest content.

When this content mismatch occurs, there are several options available within the STEP Workbench for updating page contents. This topic addresses the options available from the workbench. For information on updating pages from within InDesign, see the **Updating Documents From InDesign** section of the **STEP Publisher** documentation.

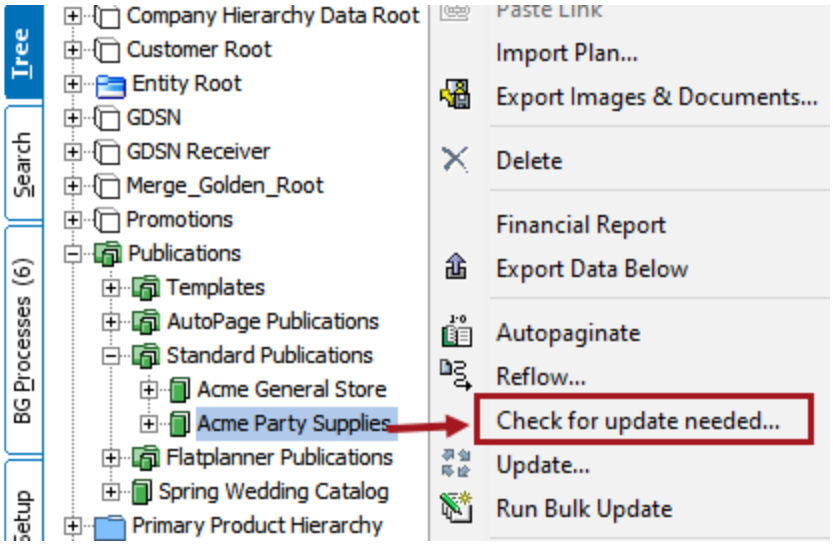
Check for Updates

Though it is possible to update the contents of entire publications and sections at once without first checking to see exactly what pages or mounted objects contain outdated content, STEP provides options that can pinpoint the exact locations where content needs updating. This 'pinpointing' approach allows for smaller page update operations, preventing scenarios where a large amount of system resources are tied up for large update operations (for example, on entire publications) when only one section or even one document may actually need updating.

Documents can be checked for needed updates from the Tree, the AutoPage Publication Planner, and by using a Bulk Update operation.

Check for Updates From the Tree

1. In the Tree, navigate to the relevant publication or section, then right-click and select **Check for update needed...**.



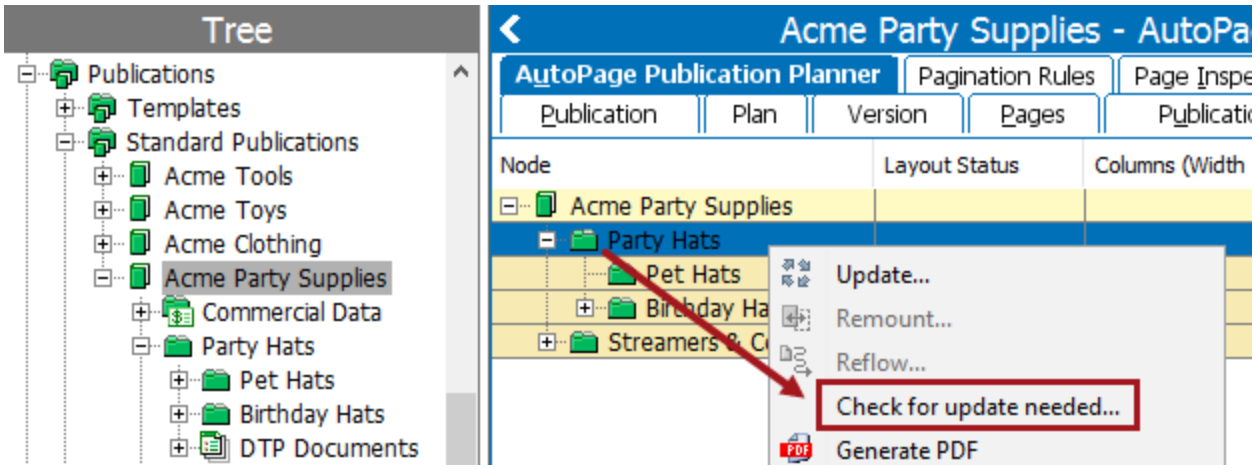
2. The **Check for Update Needed** dialog displays. Click **OK**.
3. An 'Autopage Batch Service' background process is kicked off that checks for changes in all the mounted objects in the selected publication or section.
4. To monitor the progress of the background process on the BG Processes tab, click 'Go to process.'
5. The messages returned in the Execution Report do not indicate the specific objects that need updates. You must next go either to the **AutoPage Publication Planner** or the **Page Inspector** tab to see where the updates are needed. See the 'Updating Documents' section of this topic below for more information.

Important: Only content updates are recognized by the system. Template changes or pagination rule changes are not shown as updates needed in the Page Inspector or AutoPage Publication Planner.

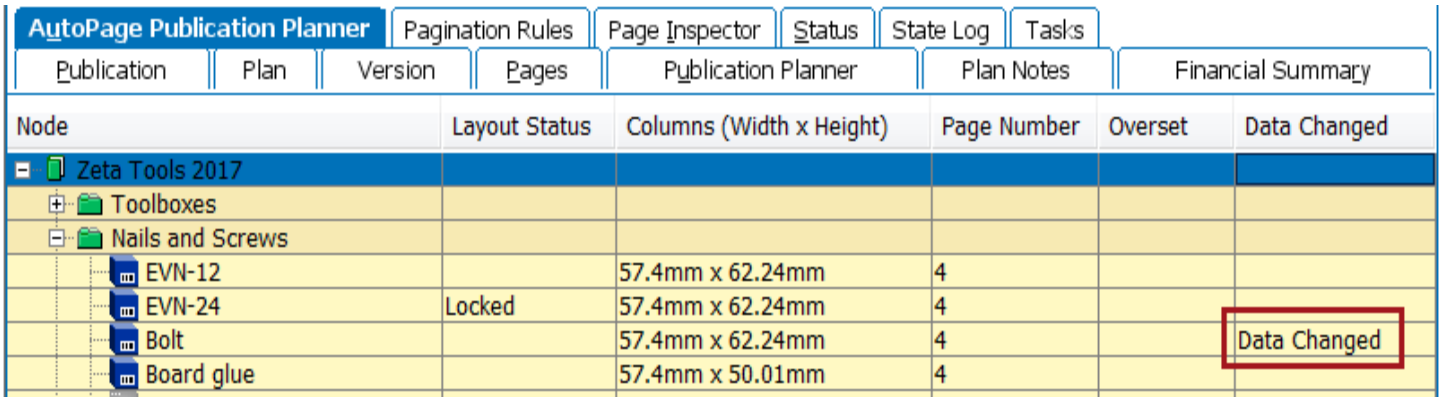
Check for Updates From the AutoPage Publication Planner

1. In the Tree, navigate to the relevant publication or section, then go to the **AutoPage Publication Planner** tab.
2. Right-click a section or subsection row, and then choose **Check for update needed.**

Note: Updates cannot be checked for an entire publication from the AutoPage Publication Planner; this can only be done from the Tree.

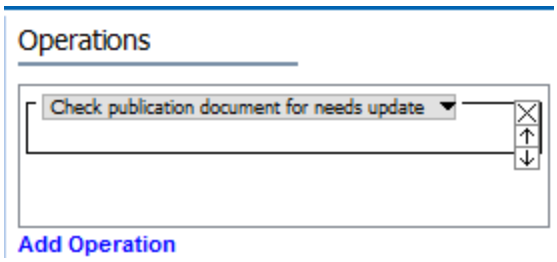


3. The **Check for Update Needed** dialog displays. Click **OK**.
4. An 'Autopage Batch Service' background process is kicked off that checks for changes in all mounted objects in the selected section.
5. To monitor the progress of the background process on the BG Processes tab, click 'Go to process.'
6. Return to the AutoPage Publication Planner. If there are mounted objects whose content has changed in STEP since the page was last mounted, 'Data Changed' will display in the 'Data Changed' column.



Check for Updates Using Bulk Update

Documents can be checked for updates by running the bulk update operation 'Check publication document for needs update.' This operation is accessed in step 2 of the bulk update wizard ('Operations').



Checking for updates from the bulk update wizard is, for all intents and purposes, identical to checking for updates from the two previously documented methods in this topic. It is essentially the same functionality, just accessed from a different location.

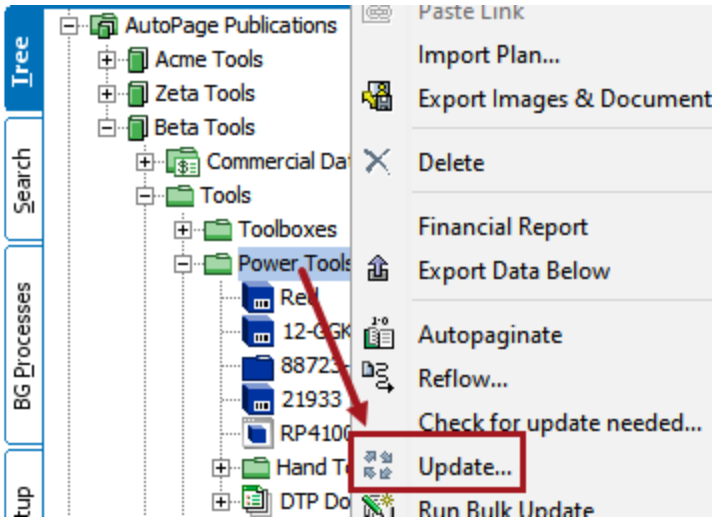
For information on how to access and use bulk update publishing operations, see **Publishing: Check Publication Document for Needs Update Operation** in the **Getting Started** / **User Guide** documentation.

Updating Documents

Mounted pages saved back to STEP can be updated from the Tree by the following methods for users of any STEP Publisher license: **Update** and **Bulk Update**. Both methods work in a near-identical fashion, but **Update** is the simplest and most straightforward. In AutoPage, documents—and even individual mounted objects themselves—can be updated from the AutoPage Publication Planner.

Update Documents From the Tree

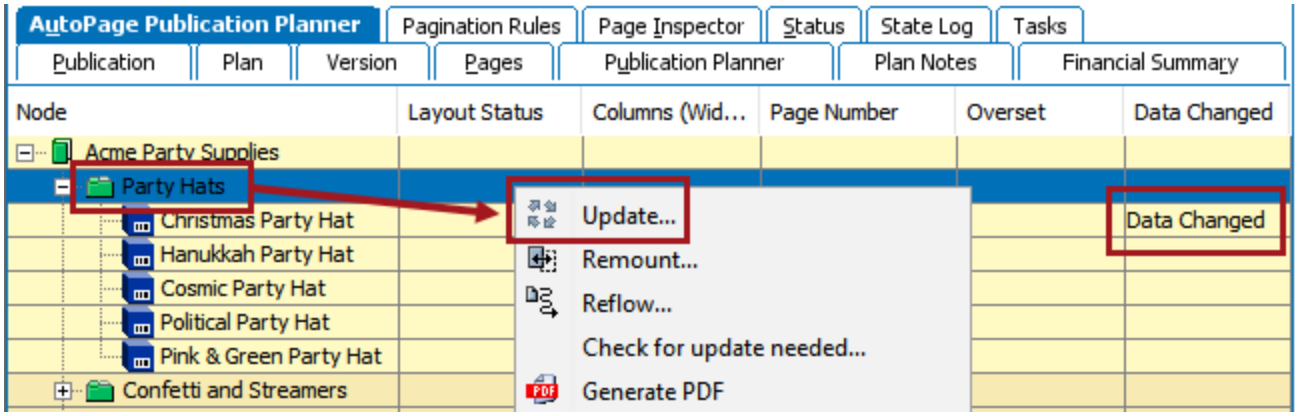
The **Update** feature is accessed by right-clicking on a publication, section, or DTP document object in the publication hierarchy.



Since 'Update' is valid for any STEP publishing component, as long as an InDesign server [IDS] is set up and integrated with the STEP application server, this functionality is detailed in the **Updating Documents in the Workbench** section of the **STEP Publisher** documentation.

Update Documents From the AutoPage Publication Planner

1. In the Tree, navigate to the relevant publication or section, then go to the **AutoPage Publication Planner** tab.
2. Right-click on the relevant section that contains the object(s) designated as 'Data Changed.' This step assumes that you have already run a check for updates, as detailed in the 'Checking for Updates' section of this topic above.

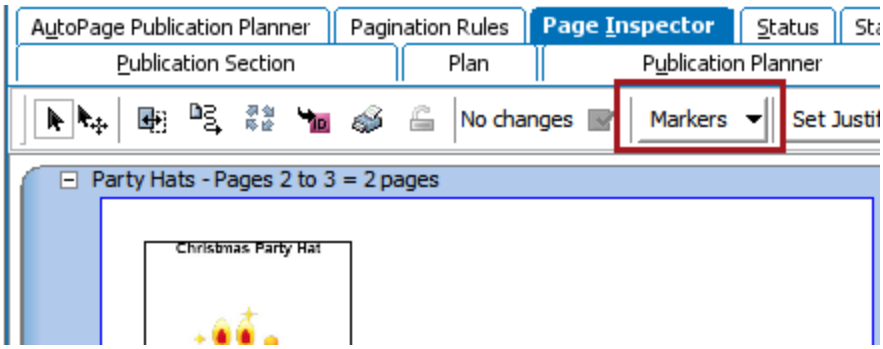


3. The 'Update contents of documents' dialog displays.
4. Follow the instructions as detailed in the **Updating Documents in the Workbench** section of the **STEP Publisher** documentation to complete the update process.

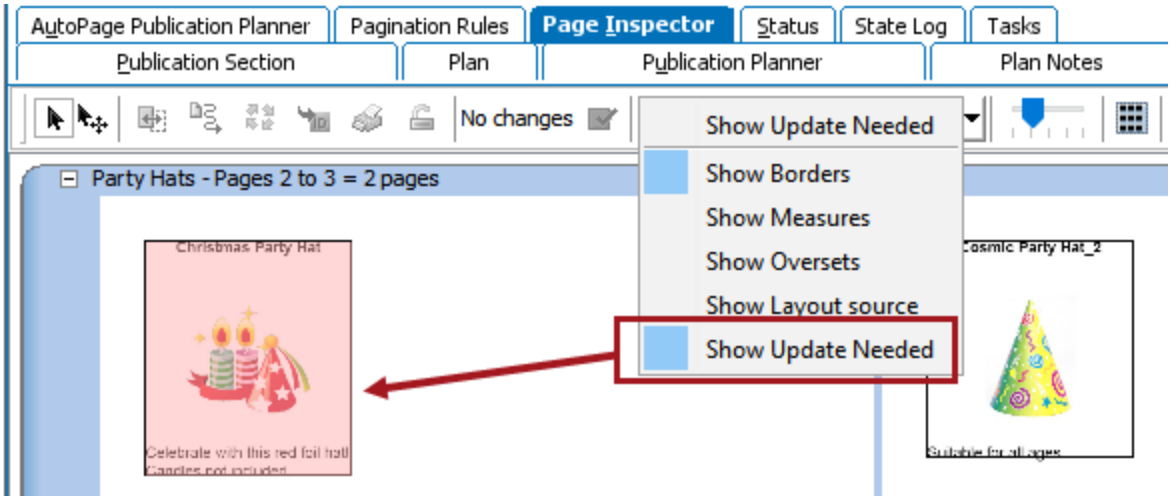
Update Documents From the Page Inspector

Once documents have been checked for needed updates, the AutoPage Page Inspector provides a visual indicator to let you know if an update needs to be run on a mounted object or page.

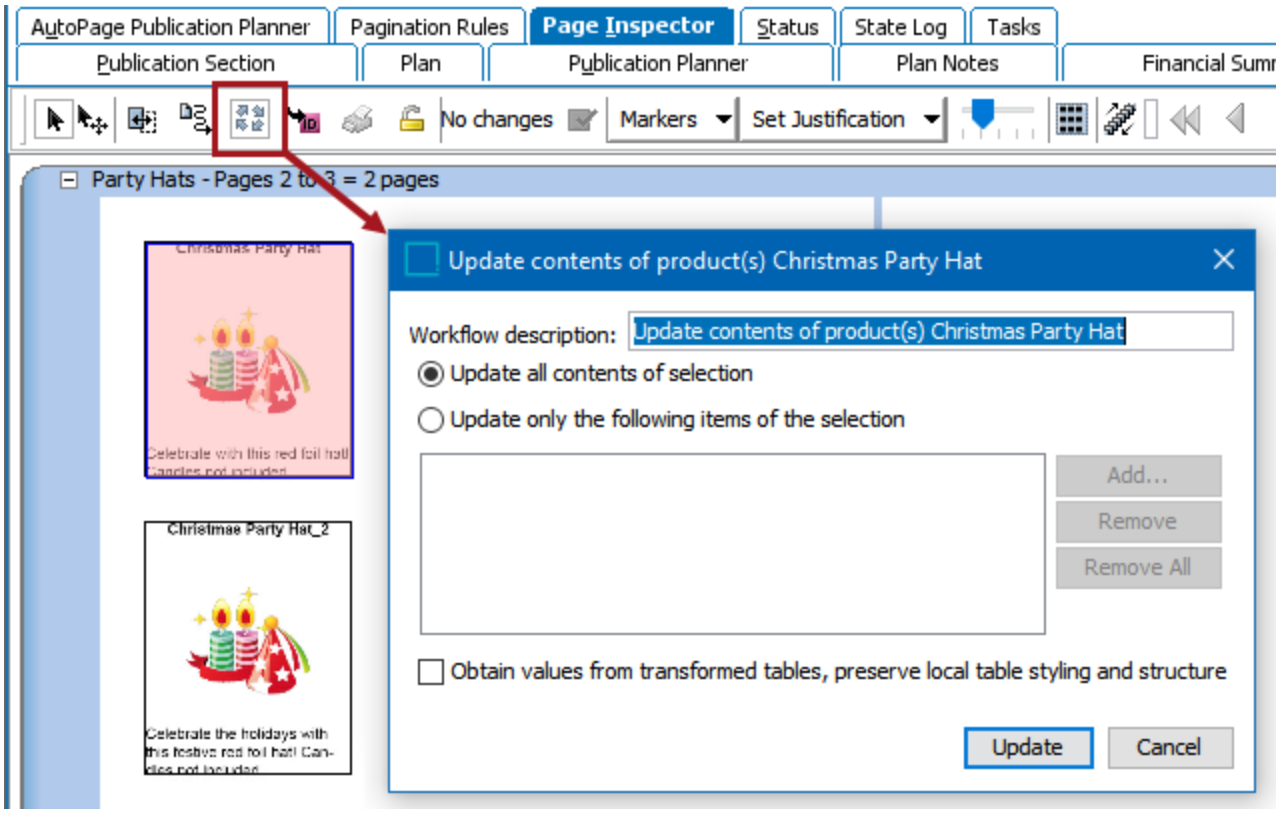
1. In the Tree, navigate to the relevant publication or section, then go to the **Page Inspector** tab.
2. Click on the **Markers** button.



3. Choose **Show Update Needed** from the dropdown list. Objects on the page that have out-of-date data will display in a pink-shaded box.



4. Click on an individual pink-shaded box—or on an entire page—that you would like to update. Boxes and pages may be multi-selected by holding down the Ctrl button while making selections.
5. Click the **Update** icon to launch the 'Update contents of' dialog.



6. Follow the instructions as detailed in the **Updating Documents in the Workbench** section of the **STEP Publisher** documentation to complete the update process.

Updating Documents Using Bulk Update

Bulk update is another method of accessing the same features available under 'Update'. For information on bulk update operations for STEP publication documents, see **Publishing: Check Publication Document for Needs Update Operation** in the **Getting Started** / **User Guide** documentation.

Creating Tables of Contents in AutoPage

In AutoPage, tables of contents (TOCs) can be mounted on pages that typically appear at the beginning of publications and/or sections. When sorted alphabetically, they can be thought of as **section indexes**, as their intent is to alphabetically list the STEP names of all sections that appear within an entire publication and/or the names of all subsections that appear within a section. When sorted by page number, they can be thought of as true **tables of contents**, listing mounted objects in the actual order that they appear within the publication.

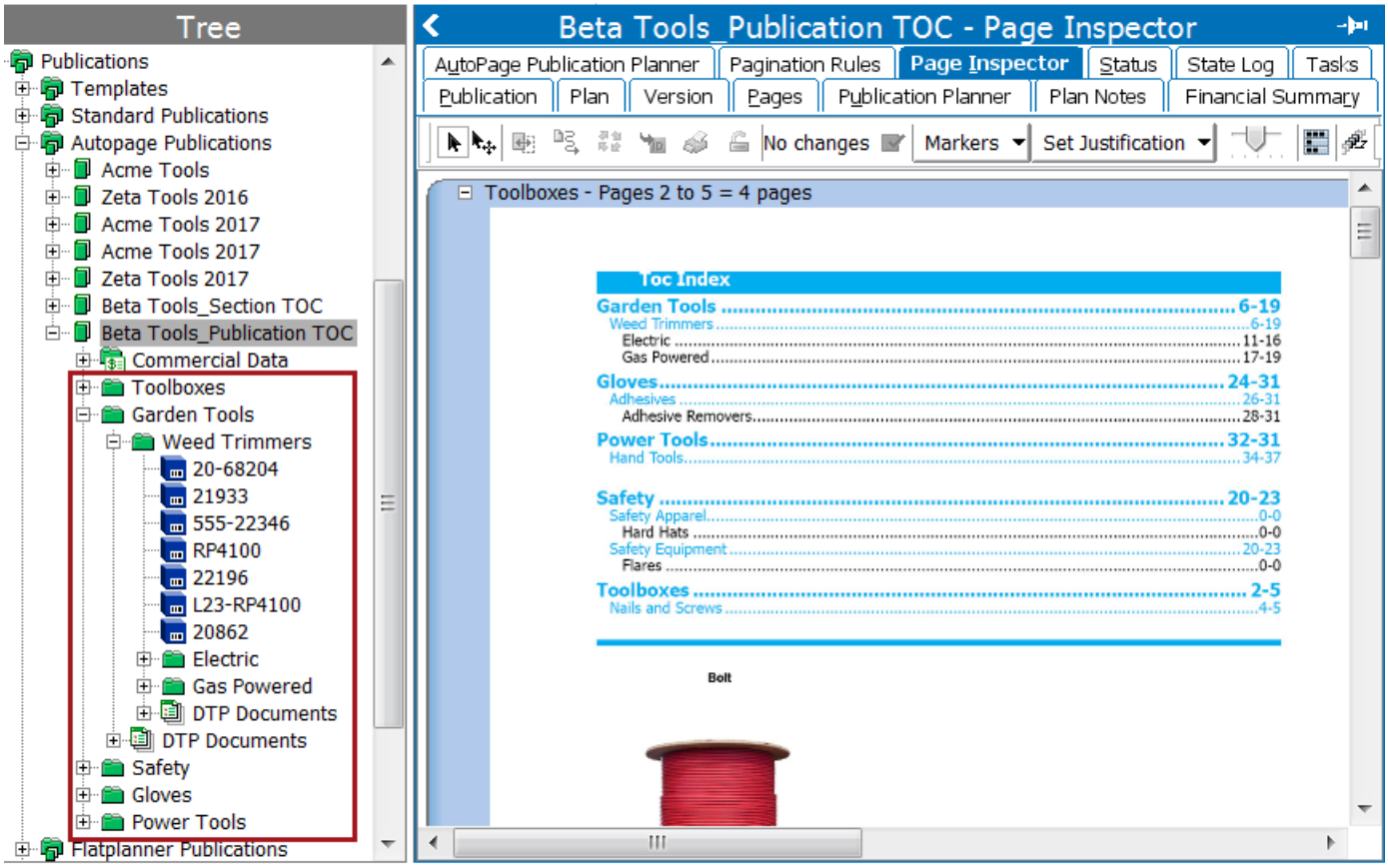
The mounting of tables of contents / section indexes in AutoPage is accomplished using a combination of the following:

- A specially configured product template
- 'Repeat' pagination rules
- 'Object layout' pagination rules

The product template that is used to create tables of contents uses tagging that mounts the following information:

- STEP names of the child sections and subsections of the publication and/or section
- Values from calculated description attributes that pull in the first and last page numbers of mounted pages that are saved into the publication's sections and subsections

Combining this product template with the aforementioned AutoPage pagination rules will mount the publication and/or section objects themselves onto pages. The following screenshot shows an example of an alphabetically sorted publication-level table of contents displayed in the AutoPage **Page Inspector**.



This topic focuses on how to configure the AutoPage **pagination rules** that will mount the table of contents in autopaginated publications. It does not describe how to create and configure the product template that is used in conjunction with these pagination rules. For information on how to create this product template, see the **Creating a Table of Contents Product Template** section of the **STEP Publisher** documentation. For additional information on AutoPage pagination rules, see **AutoPage Pagination Rules**.

Rules for Publication-level Tables of Contents

To create a table of contents for an entire publication, the publication object itself is mounted. In order to mount a publication object, there must be at least one **repeat** pagination rule and one **object layout** pagination rule configured at the publication level.

The **Repeat rules** pagination rule group is configured to use the pagination rule condition **If first in publication** and the pagination rule action **Repeat publication**. The combination of this condition and action enable the publication object itself to be mounted at the beginning of the publication.

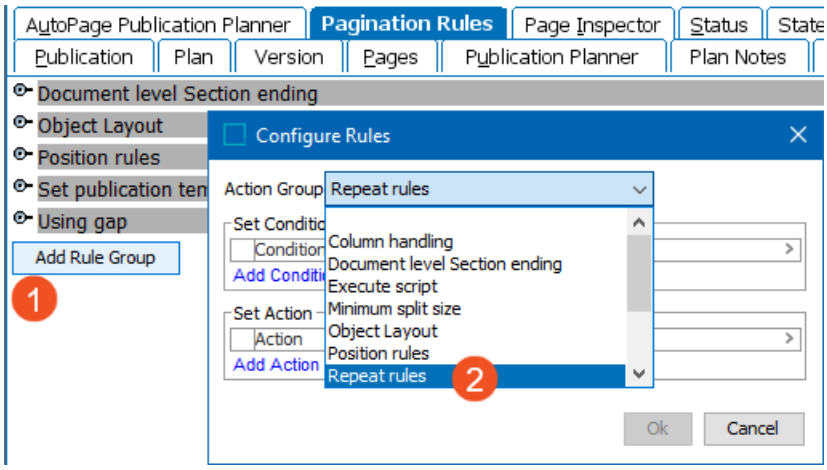
The **Object Layout** pagination rule group is configured to use the pagination rule condition **If the Object Type is** and the pagination rule action **Use product template**.

The following sections describe how to configure the combination of these rules using the relevant publication object type and a product template designed to create a TOC / section index.

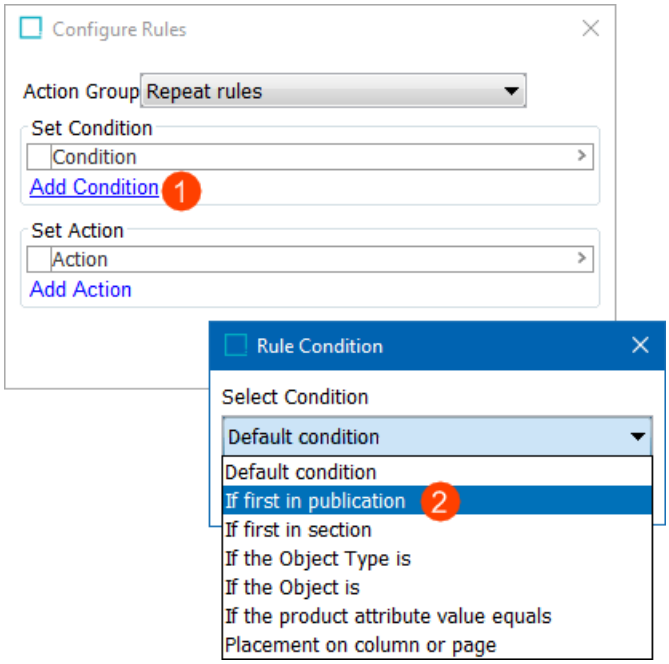
Repeat Rule

To configure the Repeat rule for the publication object, follow these steps:

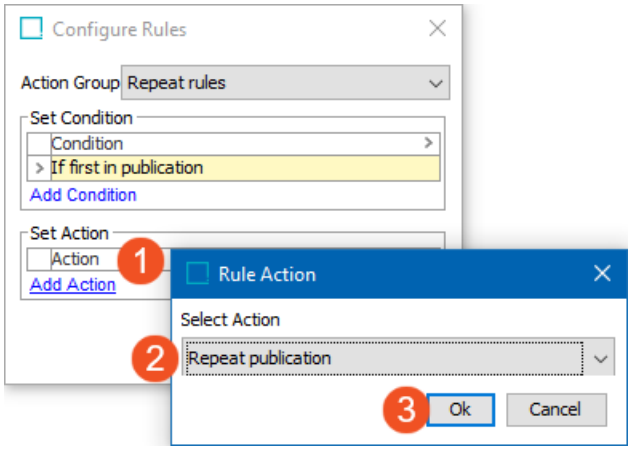
1. Navigate to the relevant publication in the publication hierarchy, then click on the **Pagination Rules** tab.
2. Click **Add Rule Group**. In the **Configure Rules** dialog that displays, select **Repeat rules** from the **Action Group** dropdown list.



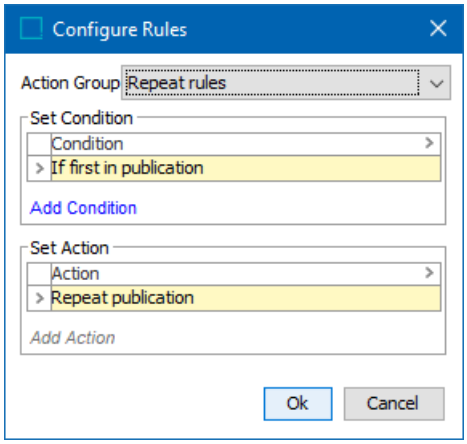
3. Next, click **Add Condition**. In the **Rule Condition** dialog that displays, select **If first in publication** from the **Select Condition** dropdown list, then click **Ok**. (The Ok button is not pictured; it is behind the Select Condition dropdown list.)



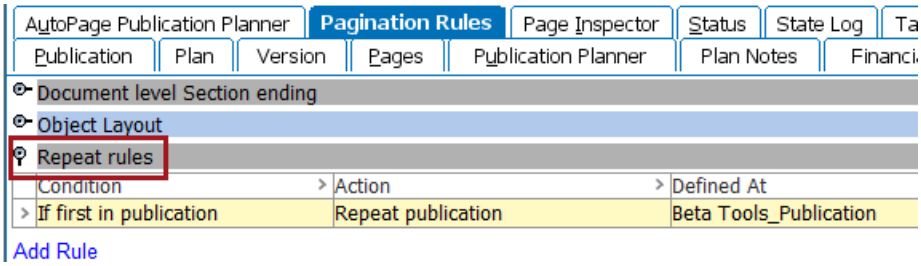
4. On the **Configure Rules** dialog, click **Add Action**. In the **Rule Action** dialog that displays, select **Repeat publication** from the **Select Action** dropdown list, then click **Ok**.



5. The Configure Rules dialog should now look like this. Click **Ok** to close the dialog.



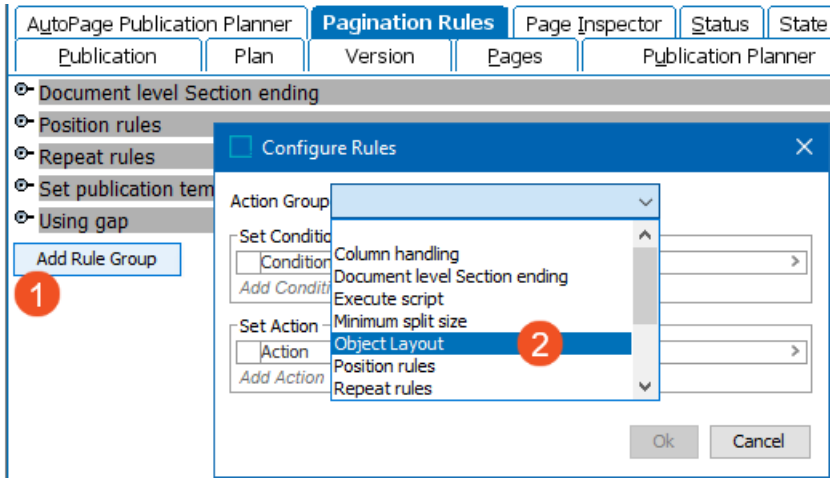
6. When configured properly, the Repeat rule for publications will look like this on the Pagination Rules tab:



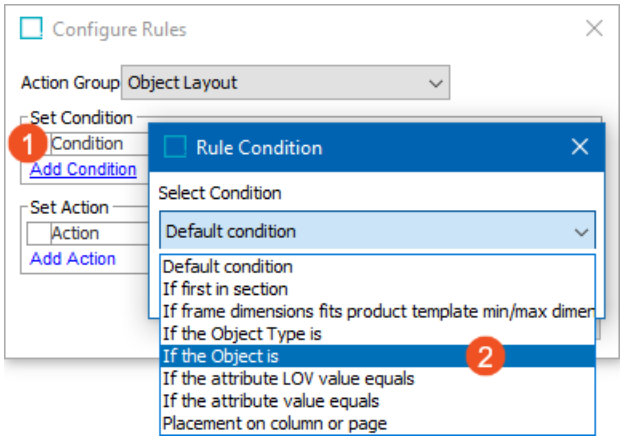
Object Layout Rule

To configure the Object Layout rule for the publication object, follow these steps:

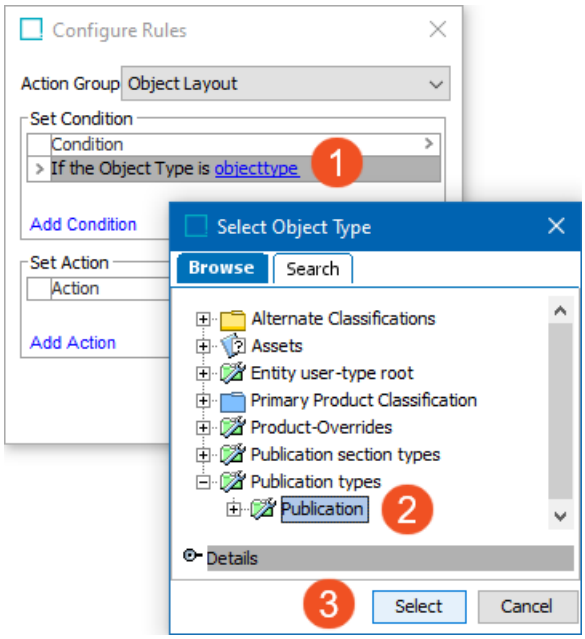
1. On the **Pagination Rules** tab, click **Add Rule Group**. In the **Configure Rules** dialog that displays, select **Object Layout** from the **Action Group** dropdown list.



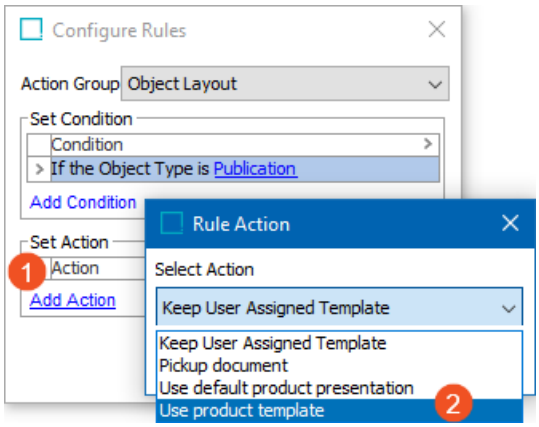
2. Next, click **Add Condition**. In the **Rule Condition** dialog that displays, select **If the Object Type is** from the **Select Condition** dropdown list, then click **Ok**. (The Ok button is not pictured below, as it is behind the Select Condition dropdown list.)



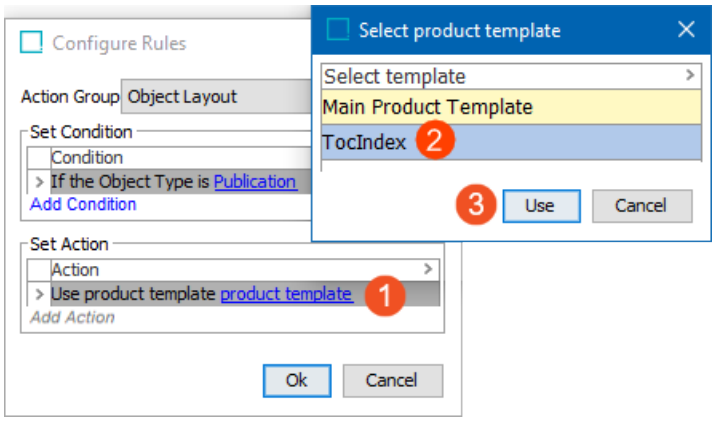
3. In the **Set Condition** area on the **Configure Rules** dialog, click **Object Type**. In the browse / search window that displays, select the relevant publication object type, then click **Select**.



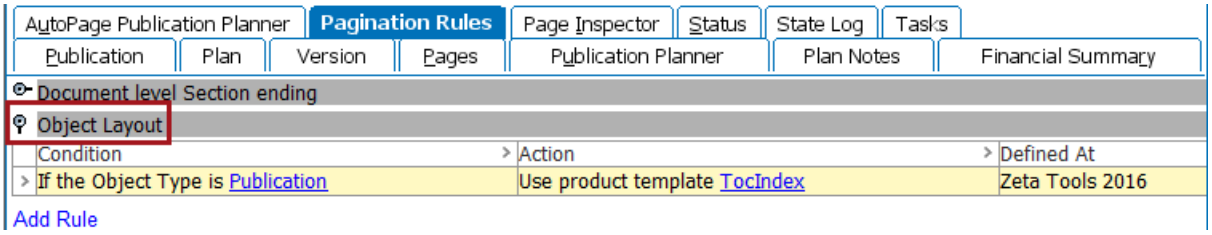
4. Next, click **Add Action**. In the **Rule Action** dialog that displays, select **Use product template** from the **Rule Action** dropdown list, then click **Ok**. (The Ok button is not pictured below; it is hidden behind the Select Action dropdown list.)



5. Click **product template**. In the **Select product template** dialog, choose the product template that has been configured to mount the table of contents / section index, then click **Use**.

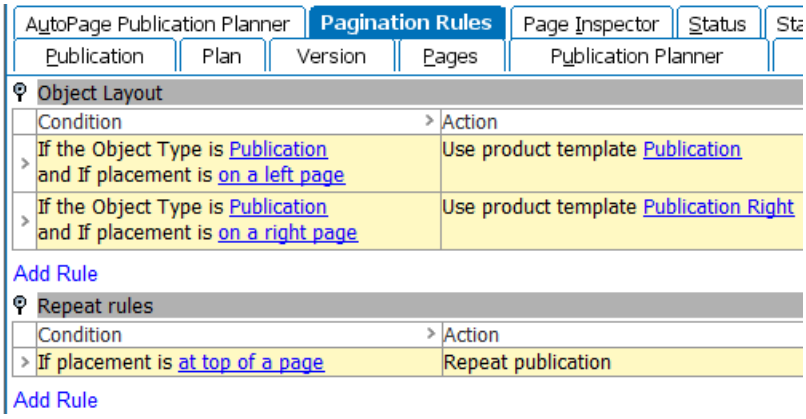


6. On the **Configure Rules** dialog, click **Ok**. The configured Object Layout rule for publications should look like this:



Additional Information on Publication Repeat Rules

The **Repeat publication** pagination rule action in the **Repeat rules** pagination rule group can also be used to pull information from publication objects other than TOCs. For example, the following screenshot shows a combination of Object Layout and Repeat rules that could be used to mount information from the publication object, such as its STEP name, at the top of each page in the publication. Other use cases could include the automatic creation of a cover sheet or confidentiality statement at the beginning of a publication.



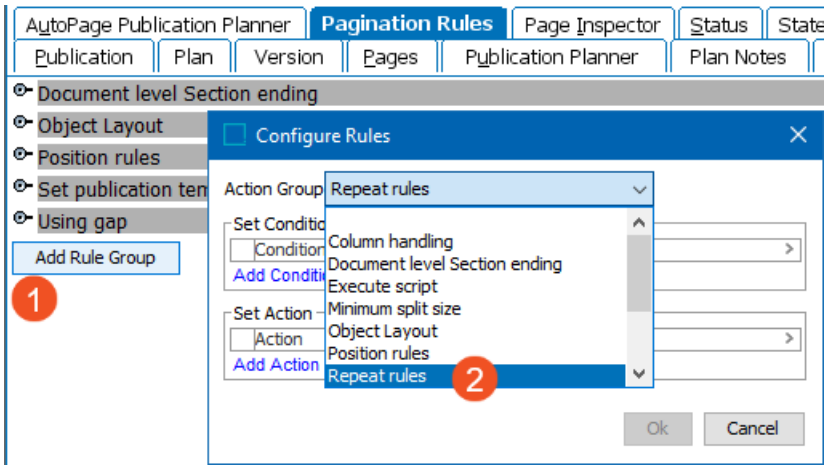
Rules for Section-level Tables of Contents

Mounting tables of contents at the section level in AutoPage uses a nearly identical setup to the mounting of tables of contents at the publication level. The difference is, instead of all sections in the entire publication being mounted at the publication level, each subsection within each section is mounted at the section level. These TOCs will appear at the beginning of every section instead of one time for the entire publication.

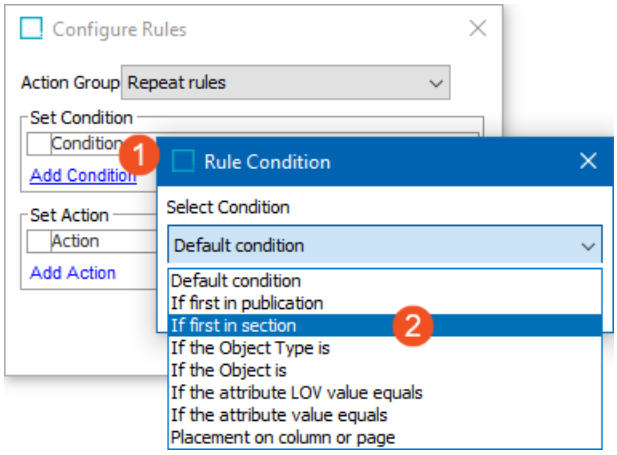
Repeat Rule

To add the Repeat Rule for sections, follow these steps:

1. Navigate to the relevant publication in the publication hierarchy, then click on the **Pagination Rules** tab.
2. Click **Add Rule Group**. In the **Configure Rules** dialog that displays, select **Repeat rules** from the **Action Group** dropdown list.



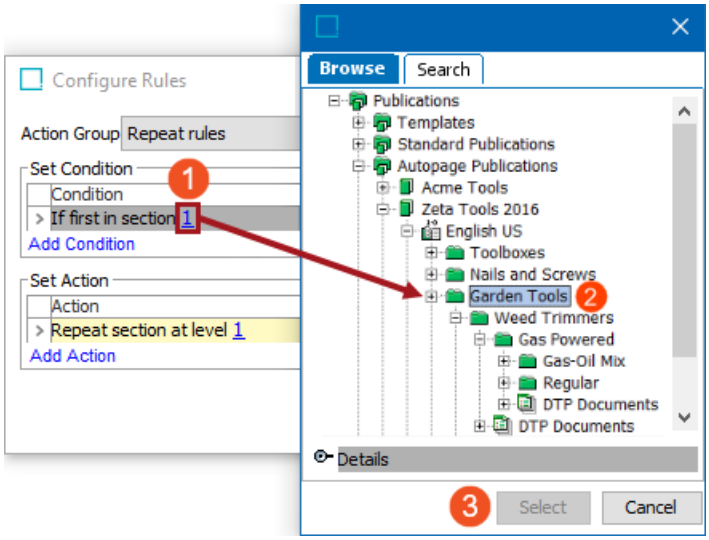
3. In the **Configure Rules** dialog, click **Add Condition**. In the **Rule Condition** dialog that displays, select **If first in section** from the **Select Condition** dropdown list, then click **Ok**. (The Ok button is not pictured, as it is behind the Select Condition dropdown list.)



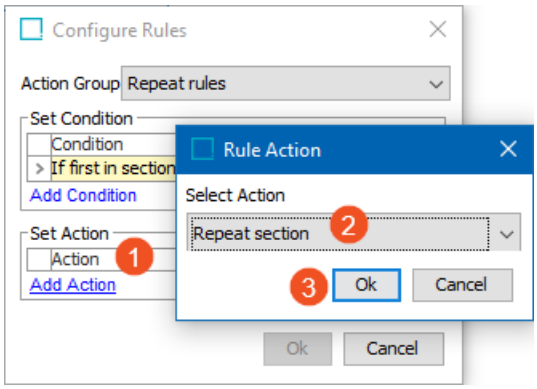
4. In the **Set Condition** area, click on the hyperlinked number, then choose a section on the level where you would like the table of contents / section index to mount. (It does not matter which specific section is chosen; just the *level* of the section.) In this example, the section Garden Tools is a first-level section. Choosing this first-level section will mount a table of contents at the beginning of every 'level 1' section throughout the publication, and these tables of contents will contain the names of the subsections, which in this example would be Weed Trimmers, Gas Powered, etc.

   If you would like the tables of contents to also mount at a subsection level, then choose a second-level section, and so on.

   Click **Select** when finished.

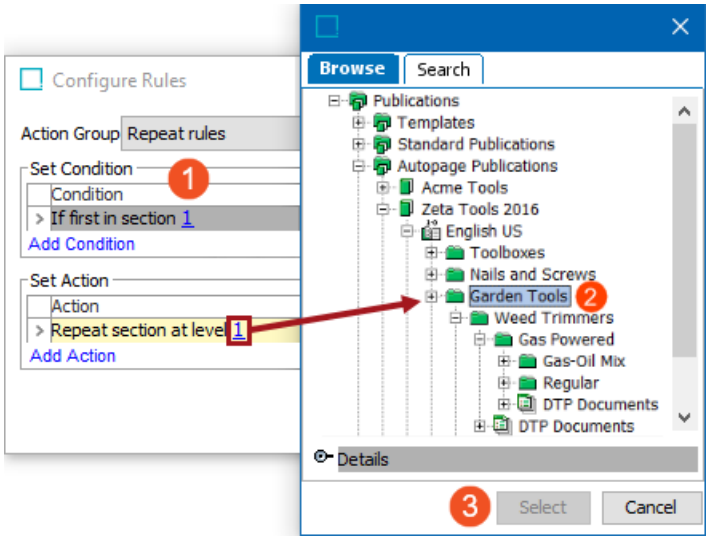


5. In the **Set Action** area, click **Add Action**. In the **Rule Action** dialog that displays, select **Repeat section** from the **Select Action** dropdown list, then click **Ok**.

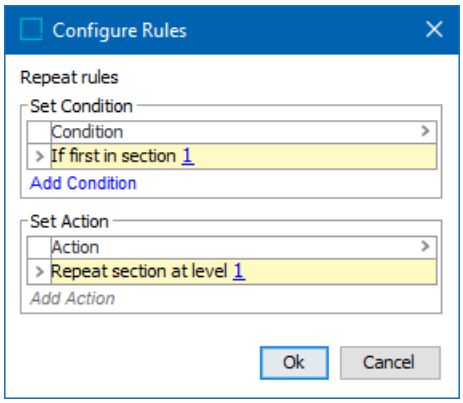


6. In the **Set Action** area, click on the hyperlinked number, then choose a section on the level where you would like the table of contents / section index to mount. This section level should match the level chosen for the 'if first in' condition.

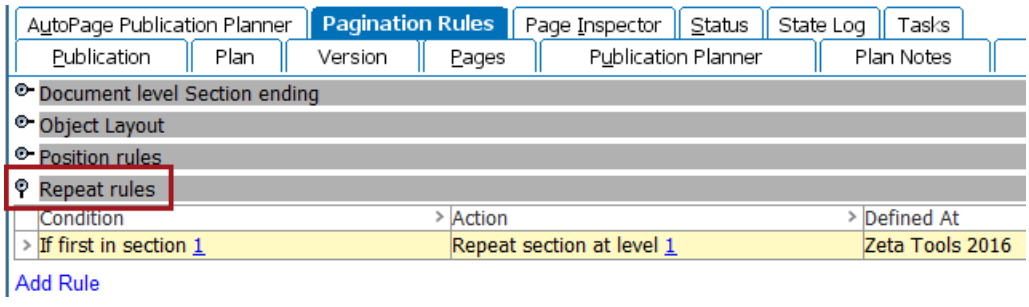
If you would like the tables of contents to also mount at a subsection level, then choose a second-level section, and so on.



7. The Configure Rules dialog should now look like this. Click **Ok** to close the dialog.



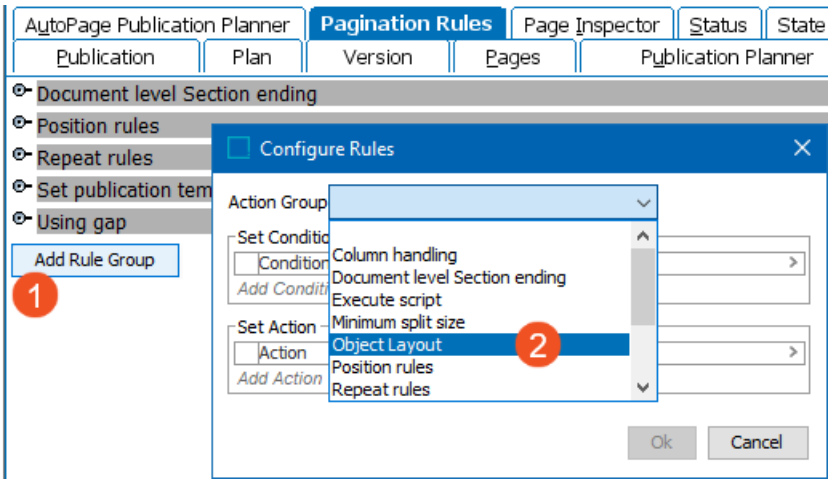
8. When configured properly, the Repeat rule for sections will look like this on the Pagination Rules tab:



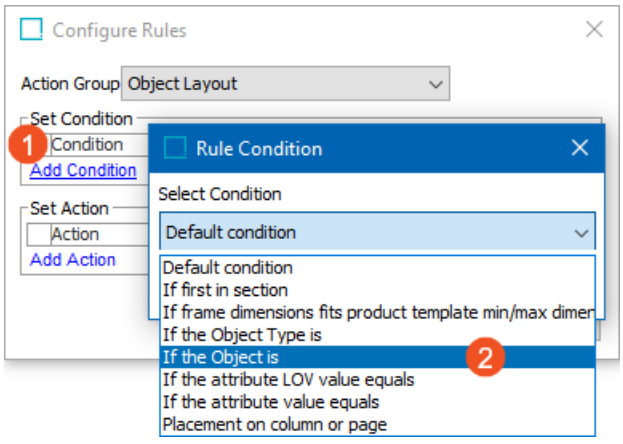
Object Layout Rule

To add the Object Layout rule for sections, follow these steps:

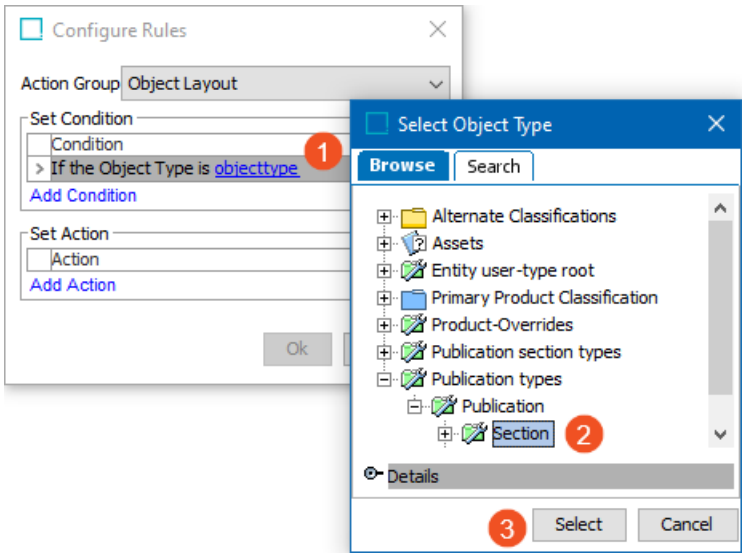
1. On the **Pagination Rules** tab, click **Add Rule Group**. In the **Configure Rules** dialog that displays, select **Object Layout** from the **Action Group** dropdown list.



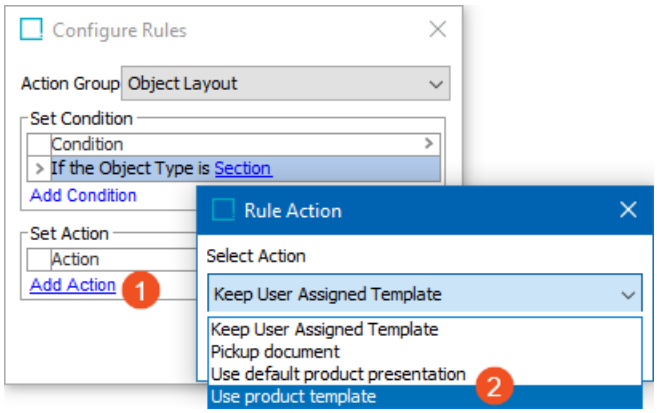
2. Next, click **Add Condition**. In the **Rule Condition** dialog that displays, select **If the Object Type is** from the **Select Condition** dropdown list, then click **Ok**. (The Ok button is not pictured below, as it is behind the Select Condition dropdown list.)



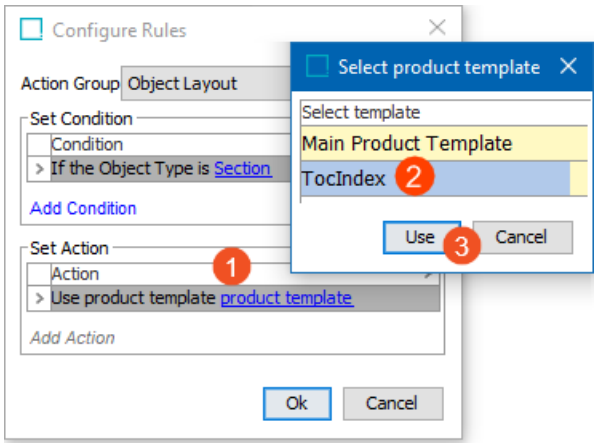
3. In the **Set Condition** area on the **Configure Rules** dialog, click **Object Type**. In the browse / search window that displays, select the relevant section object type, then click **Select**.



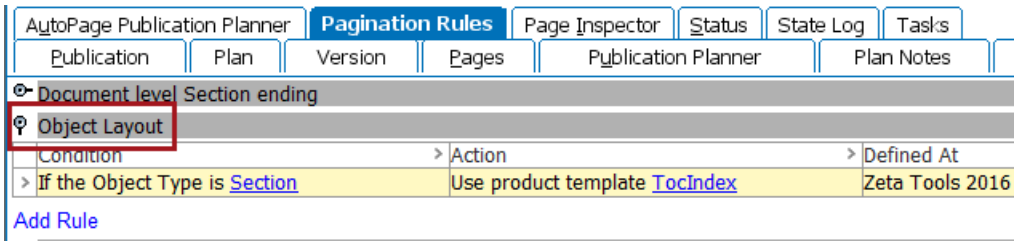
4. Next, click **Add Action**. In the **Rule Action** dialog that displays, select **Use product template** from the **Rule Action** dropdown list, then click **Ok**. (The Ok button is not pictured below, as it is behind the Select Action dropdown list.)



5. Click **product template**. In the **Select product template** dialog, choose the product template that has been configured to mount the table of contents / section index, then click **Use**.



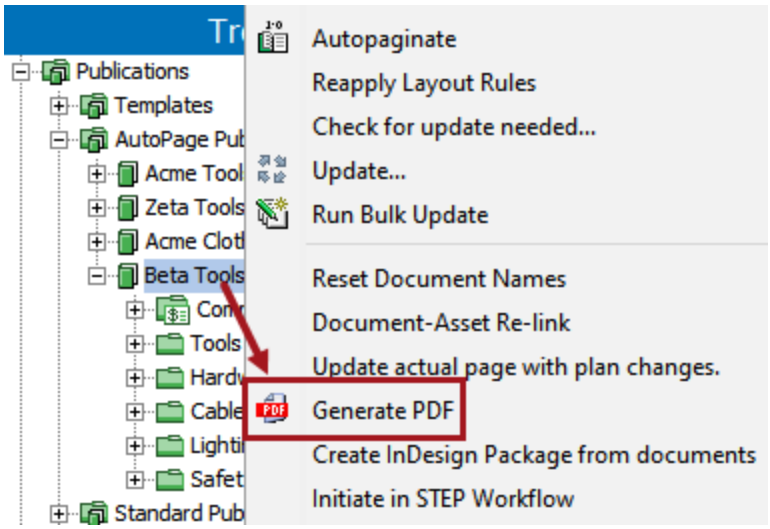
6. On the **Configure Rules** dialog, click **Ok**. The configured Object Layout rule for sections should look like this:



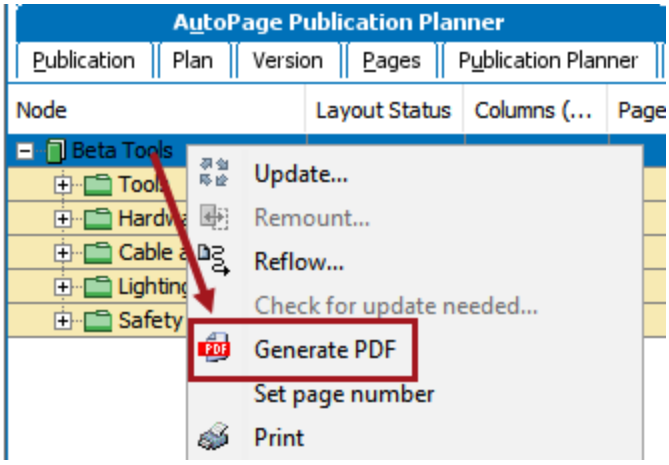
Generating PDFs in AutoPage

After your pages have been paginated and saved back to STEP, you can proof view the publication and paginated pages in a PDF to ensure that they look the way they should. PDFs can be generated for an entire publication at once or only for a selected section or subsection. PDFs can be generated from the **Tree** or the **AutoPage Publication Planner**.

1. In the **Tree**, navigate to the relevant publication or section, then right-click and select **Generate PDF**.

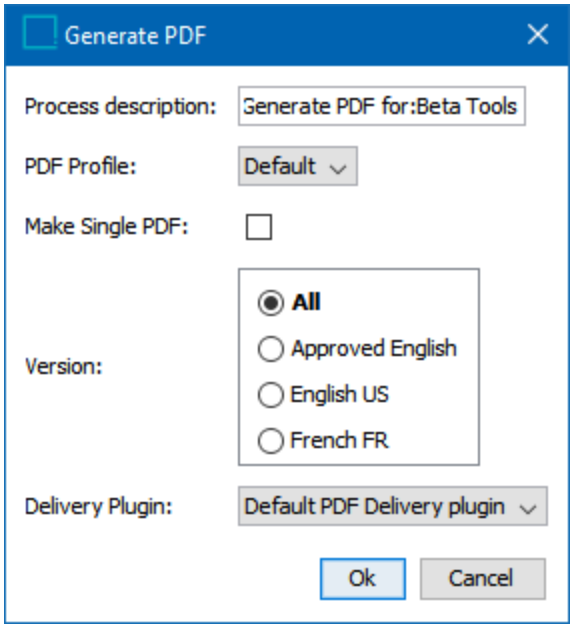


   Or, from the **AutoPage Publication Planner**, select and right-click the preferred row, then choose **Generate PDF**.



2. In the **Generate PDF** dialog, select the preferred profile from the **PDF Profile** dropdown list. Since PDF profiles are system dependent, the PDF profile is set to 'Default' if no special PDF profiles have been

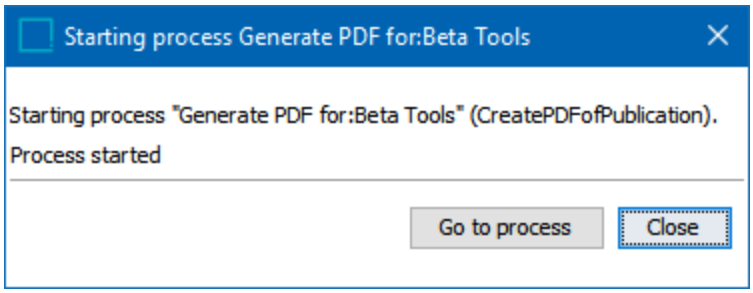
configured for the system. For information on how to create and store custom PDF profiles in STEP, see the **Setting up PDF Profiles (Presets) for the InDesign Server** topic in the **STEP Publisher** documentation.



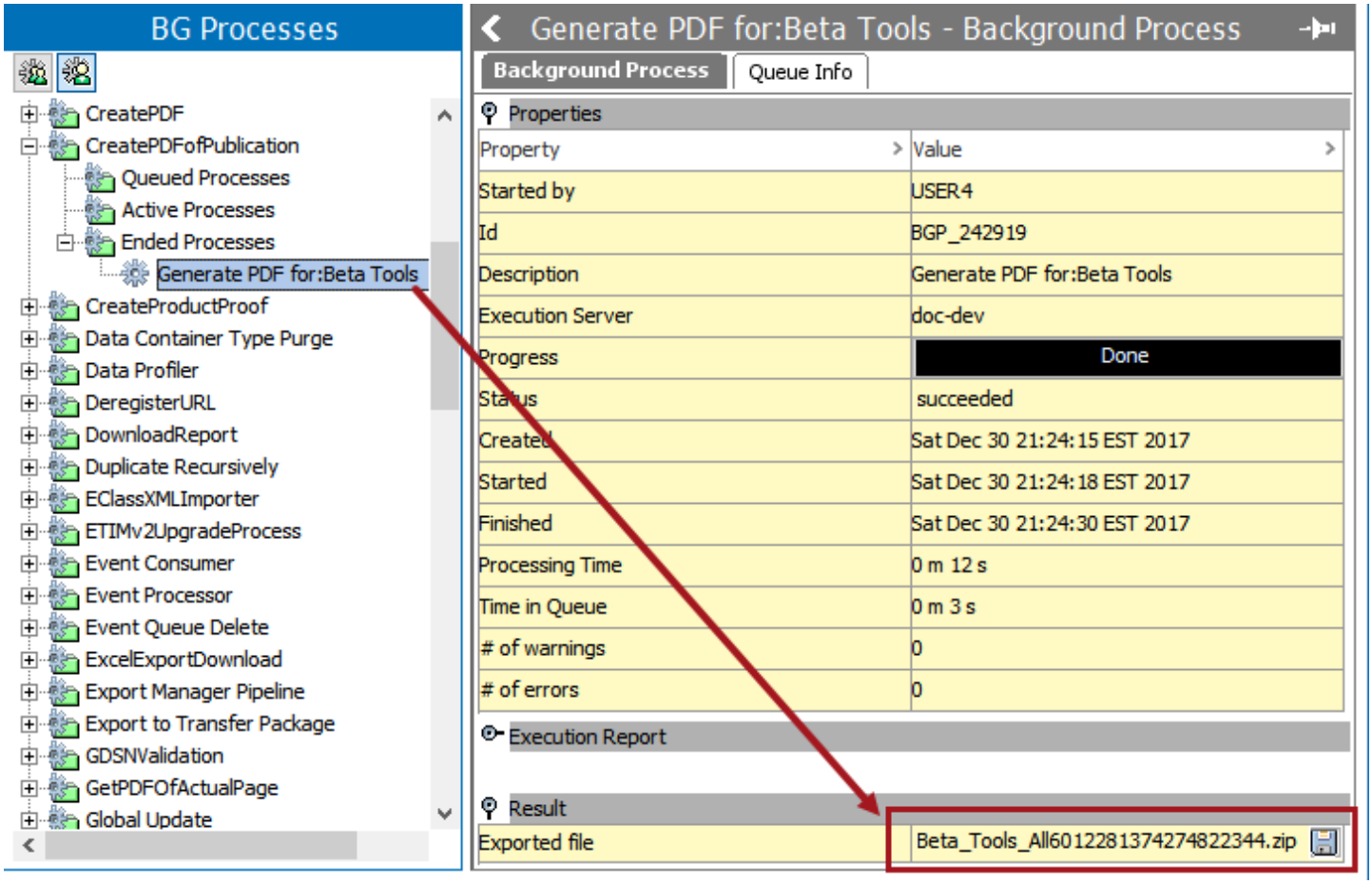
3. Check **Make single PDF** to include all documents in a single PDF file. If not selected, the resulting .ZIP file will contain a PDF of each individual DTP document.
4. Select the publication **Version** that you would like to generate PDFs from.

> **Note:** Selecting 'All' for 'Version' does not automatically generate a layered PDF; all publication versions are embedded in a single layer within the PDF unless a special PDF profile has been configured. For information on how to create and store custom PDF profiles in STEP, see the **Setting up PDF Profiles (Presets) for the InDesign Server** topic in the **STEP Publisher** documentation.

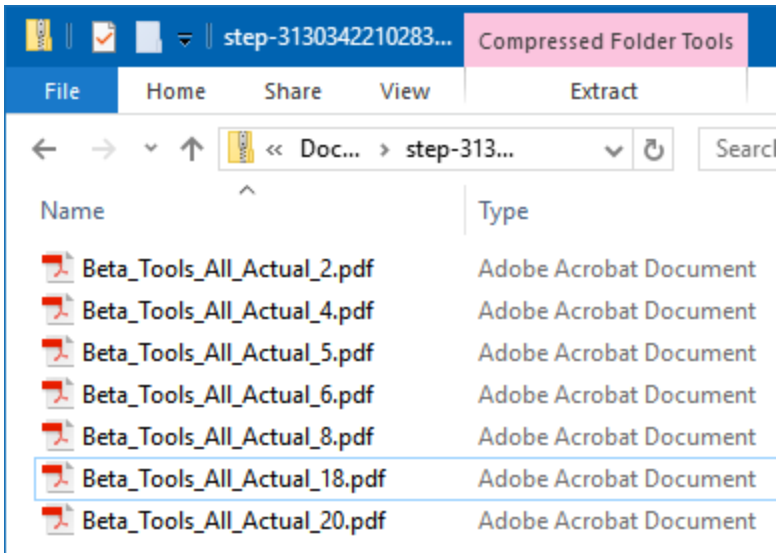
5. Select the relevant **Delivery Plugin**. By default, this is' Default PDF Delivery plugin.'
6. Click **OK** to start the **Generate PDF** background process. Click **Go to process** to go to the BG Processes tab, or, click **Close** to exit the dialog.



7. The process occurs and the resulting file is delivered under the 'CreatePDFofPublication' node on the BG Processes tab. If **Make Single PDF** was selected, a PDF file is delivered. If **Make Single PDF** was *not* selected, a .ZIP file containing multiple PDFs is delivered.



8. The contents of the delivered .ZIP file should resemble the following, if 'Make Single PDF' was left unchecked.

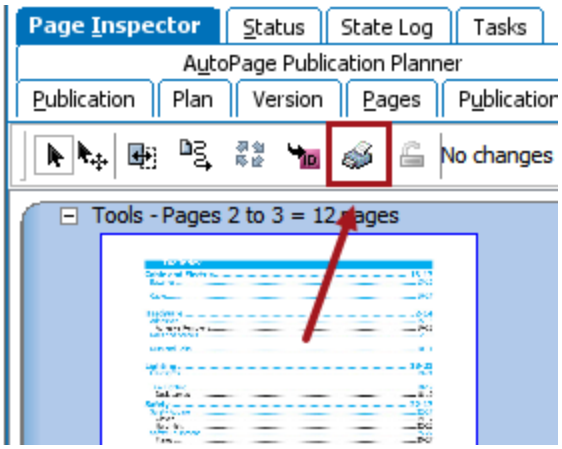

step-3130342210283...
Compressed Folder Tools
File
Home
Share
View
Extract
« Doc... › step-313...
Searcl
Name
Type
Beta_Tools_All_Actual_2.pdf
Adobe Acrobat Document
Beta_Tools_All_Actual_4.pdf
Adobe Acrobat Document
Beta_Tools_All_Actual_5.pdf
Adobe Acrobat Document
Beta_Tools_All_Actual_6.pdf
Adobe Acrobat Document
Beta_Tools_All_Actual_8.pdf
Adobe Acrobat Document
Beta_Tools_All_Actual_18.pdf
Adobe Acrobat Document
Beta_Tools_All_Actual_20.pdf
Adobe Acrobat Document

Printing Pages in AutoPage

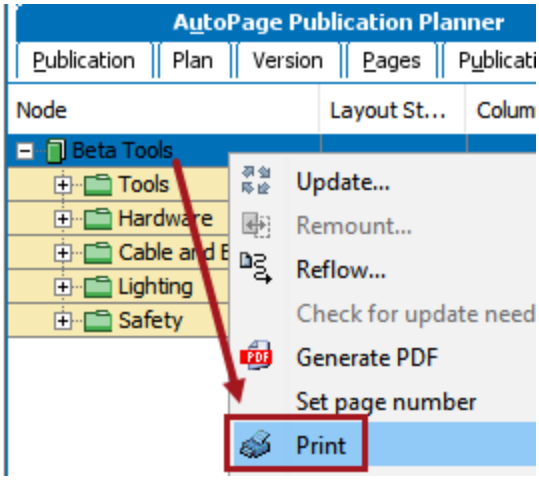
Sections and subsections may be printed from the **AutoPage Publication Planner** or from one or more pages from the **Page Inspector**.

Note: In order to print, a default printer must be installed on the InDesign server. Contact Stibo Systems for assistance if you need help configuring the InDesign server.

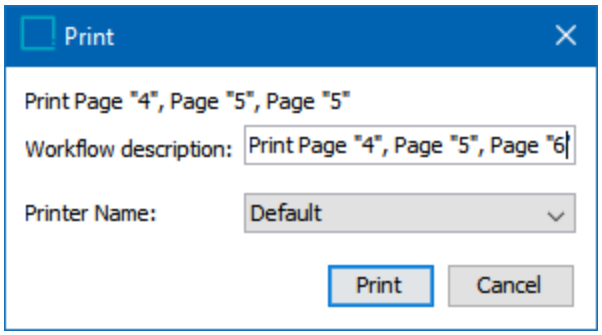
1. In the Tree, select the relevant publication, section or subsection.
2. If using the **Page Inspector**, select the page(s) that you want to print, then click the **Print** icon .



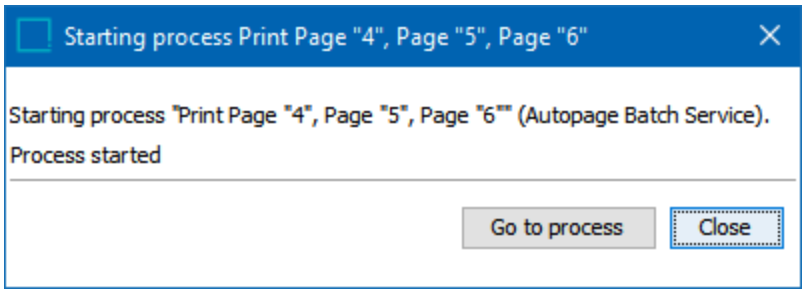
3. If using the **AutoPage Publication Planner**, select the sections or subsections that you want to print, then right-click and choose **Print**.



4. On the 'Print' dialog, click **Print**.



5. The 'Starting process Print Page' dialog displays. Click **Go to process** to monitor the progress of the Autopage Batch Service on the **BG Processes** tab.



Using the 'getInheritedPublicationValue' Function in AutoPage

The STEP function 'getInheritedPublicationValue' is used to pick up metadata (description) attribute values from section, publication, and publication group objects within the publication hierarchy. One use case for this functions in AutoPage is to display publication-related metadata on mounted pages by using calculated attributes containing these functions.

Note: Though there is a similar STEP function named 'getInheritedPublicationHierarchyValue', that function is primarily used to pull metadata onto *product* objects, which are not relevant to this topic. For more information, see the **Publishing Examples** section of the **Calculated Attributes** documentation.

Calculated attributes using the 'getInheritedPublicationValue' function can be used to mount publication metadata onto InDesign pages by way of InDesign tagging applied to the publication template. This functionality allows users more dynamic control over content that exists as 'furniture' (publication template elements) on pages spreads. For example, a section-level description attribute that identifies the 'theme' of the section could be displayed on side tabs or headers of mounted pages, reducing manual work on publication templates and mounted pages.

This topic describes how to use the 'getInheritedPublicationValue' function to pull metadata values from a section, a publication, and a publication group onto InDesign pages generated in AutoPage.

Prerequisites

This topic assumes the following:

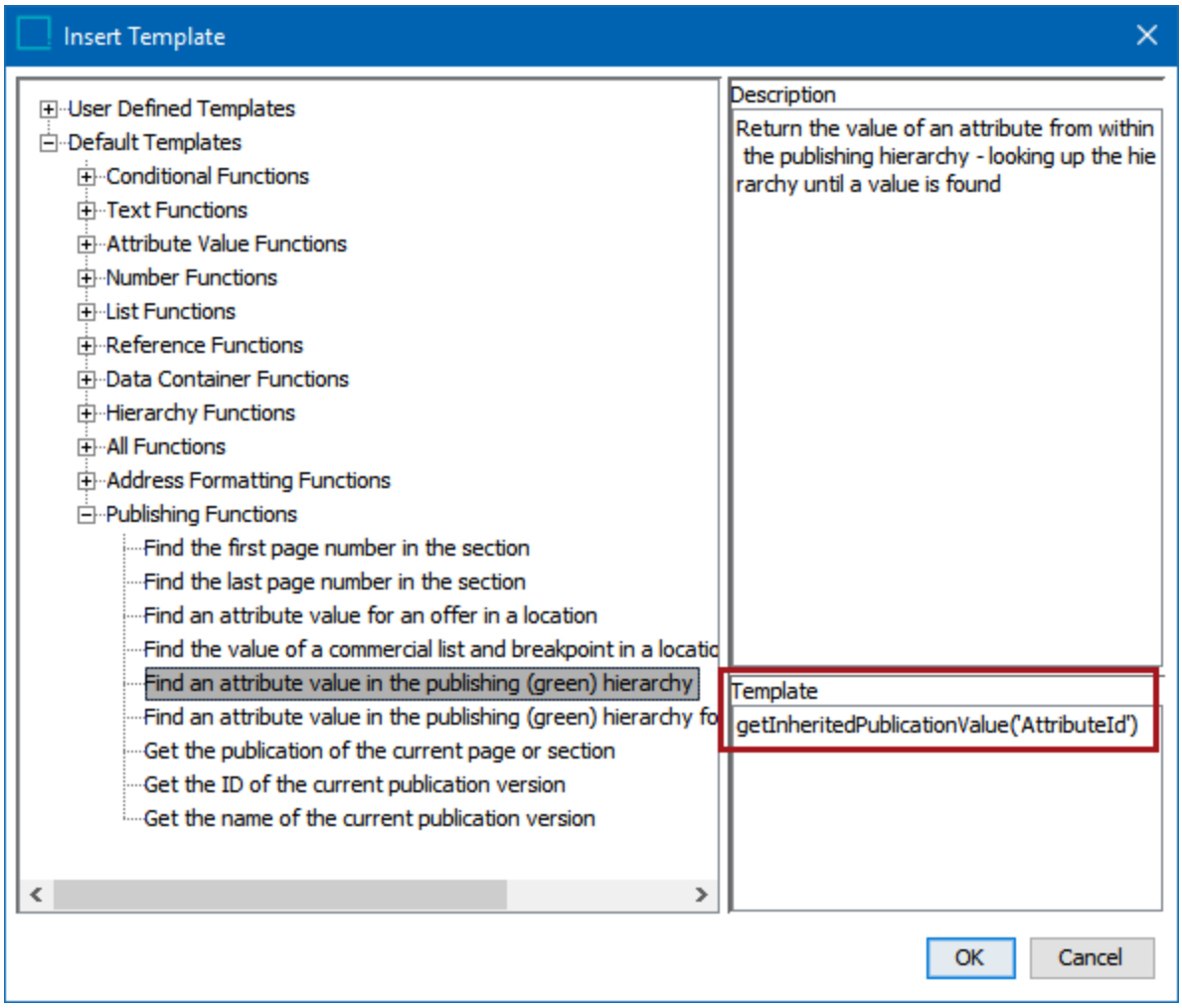
- An understanding of how to configure publication templates and product templates. For more information, see the **Publication Templates** and **Product Templates** topics in the **STEP Publisher** documentation.
- General knowledge of **STEP Functions**, which are detailed in the **Resource Materials** online help.
- An understanding of how to create attributes. See the **Creating Attributes** topic in the 'Attributes' section of the **System Setup** / **Super User Guide** documentation for more information.
- An understanding of how to create calculated attributes. See **Creating a Calculated Attribute** in the 'Attributes' section of the **System Setup** / **Super User Guide** documentation.

Configuring the Calculated Attribute(s)

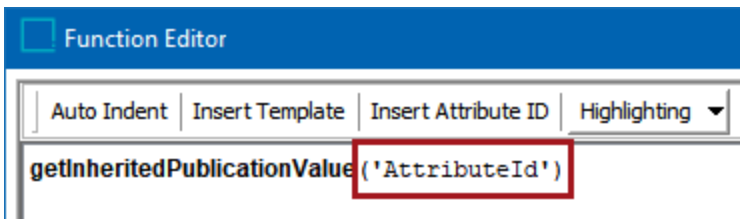
Follow these steps to create a calculated description attribute using the 'getInheritedPublicationHiearchyValue' function:

1. Create the description attribute following the steps outlined in the **Creating Attributes** and **Creating a Calculated Attribute** topics in the 'Attributes' section of the **System Setup** / **Super User Guide** documentation.

2. After creating the attribute, right-click in the 'Value template' field on the 'Attribute' tab and select **Edit Function**. The **Function Editor** will open.
3. Click **Insert Template**, then expand the **Publishing Functions** section of the Default Templates.
4. Select 'Find an attribute value in the publishing (green) hierarchy' and click OK. The **Insert Template** window will close.



5. In the **Function Editor**, replace 'AttributeId' with the ID of the metadata attribute that you would like to pull onto the page. See the examples in the following section for how the function will look in the editor after an actual attribute ID is added.



Note: Calculated attributes related to publishing functions cannot be tested in the Function Editor, as publication hierarchy [green] objects are not among the available options when selecting an object as the Evaluation Node.

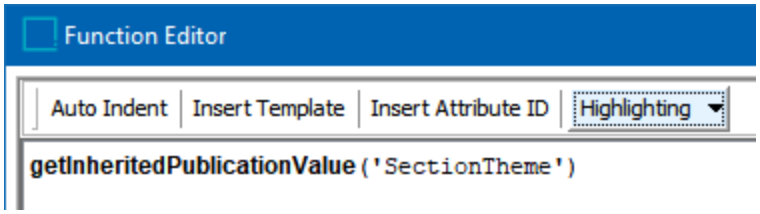
Sample Publication Metadata Attributes Configuration

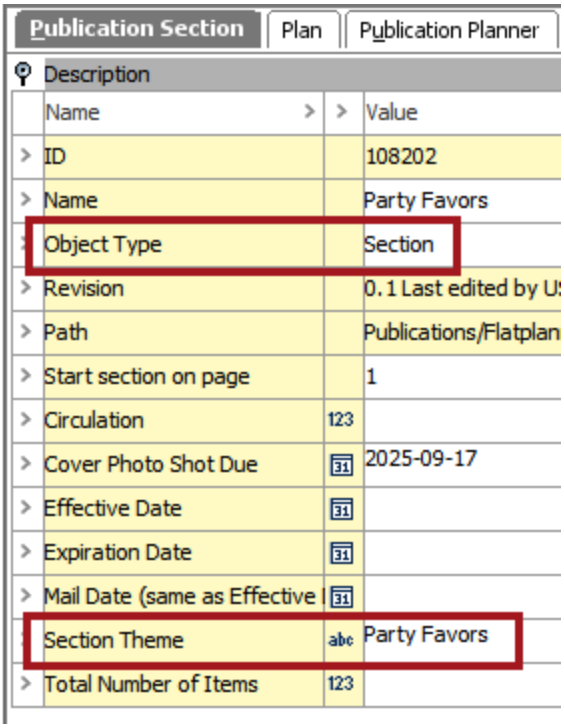
In this example, three calculated attributes are created:

1. **ObtainAttrValueFromSection**, which picks up values from **section** objects
2. **ObtainAttrValueFromPublication**, which picks up values from **publication** objects
3. **ObtainAttrValueFromPublicationGroup**, which picks up values from **publication group** objects

Section

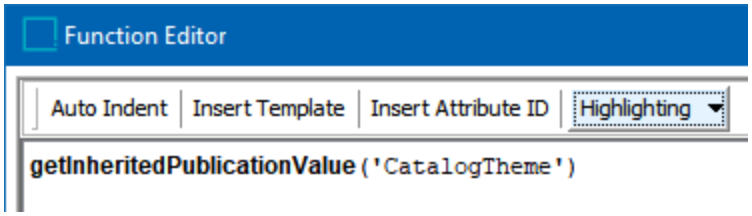
ObtainAttrValueFromSection [using the formula **getInheritedPublicationValue**('SectionTheme')] will pick up the value of the description attribute Section Theme (SectionTheme), which is 'Party Favors' in this example.

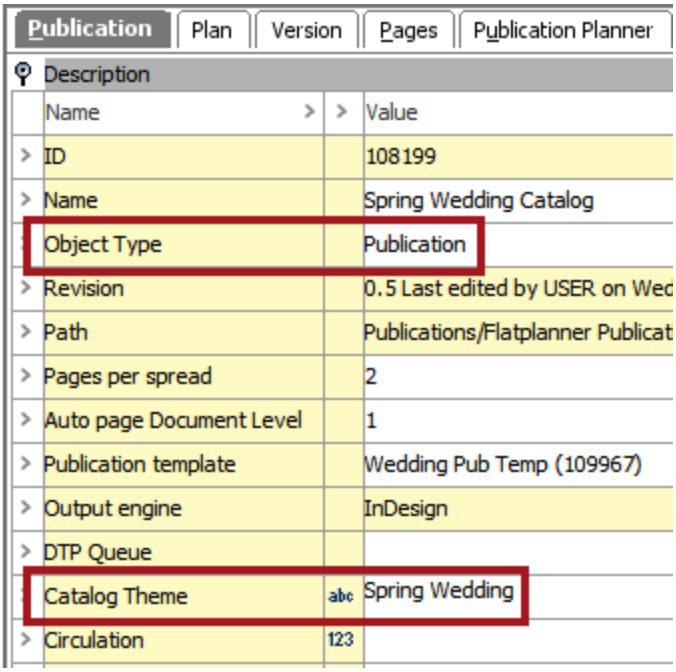




Publication

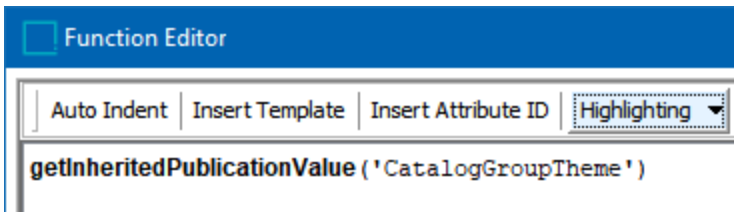
GetInheritedPublicationValue [using the formula **getInheritedPublicationValue**('CatalogTheme')] will pick up the value of the description attribute Catalog Theme (CatalogTheme), which is 'Spring Wedding' in this example.

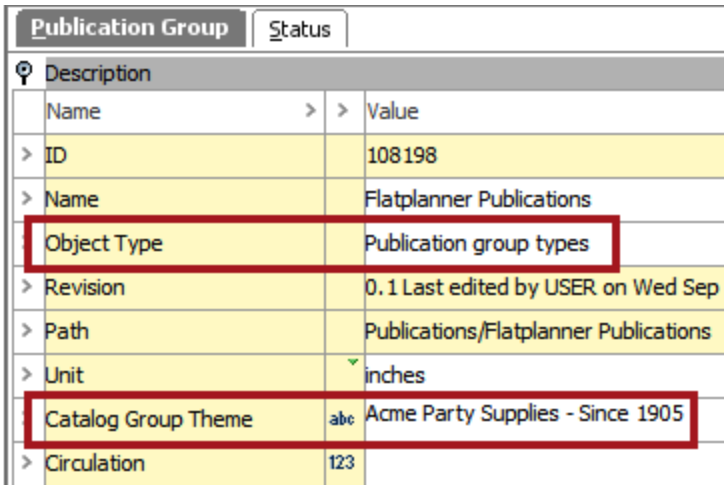




Publication Group

ObtainAttrValueFromPublicationGroup [using the formula **getInheritedPublicationValue** ('CatalogGroupTheme')] will pick up the value of the description attribute Catalog Group Theme (CatalogGroupTheme), which is 'Acme Party Supplies - Since 1905' in this example.





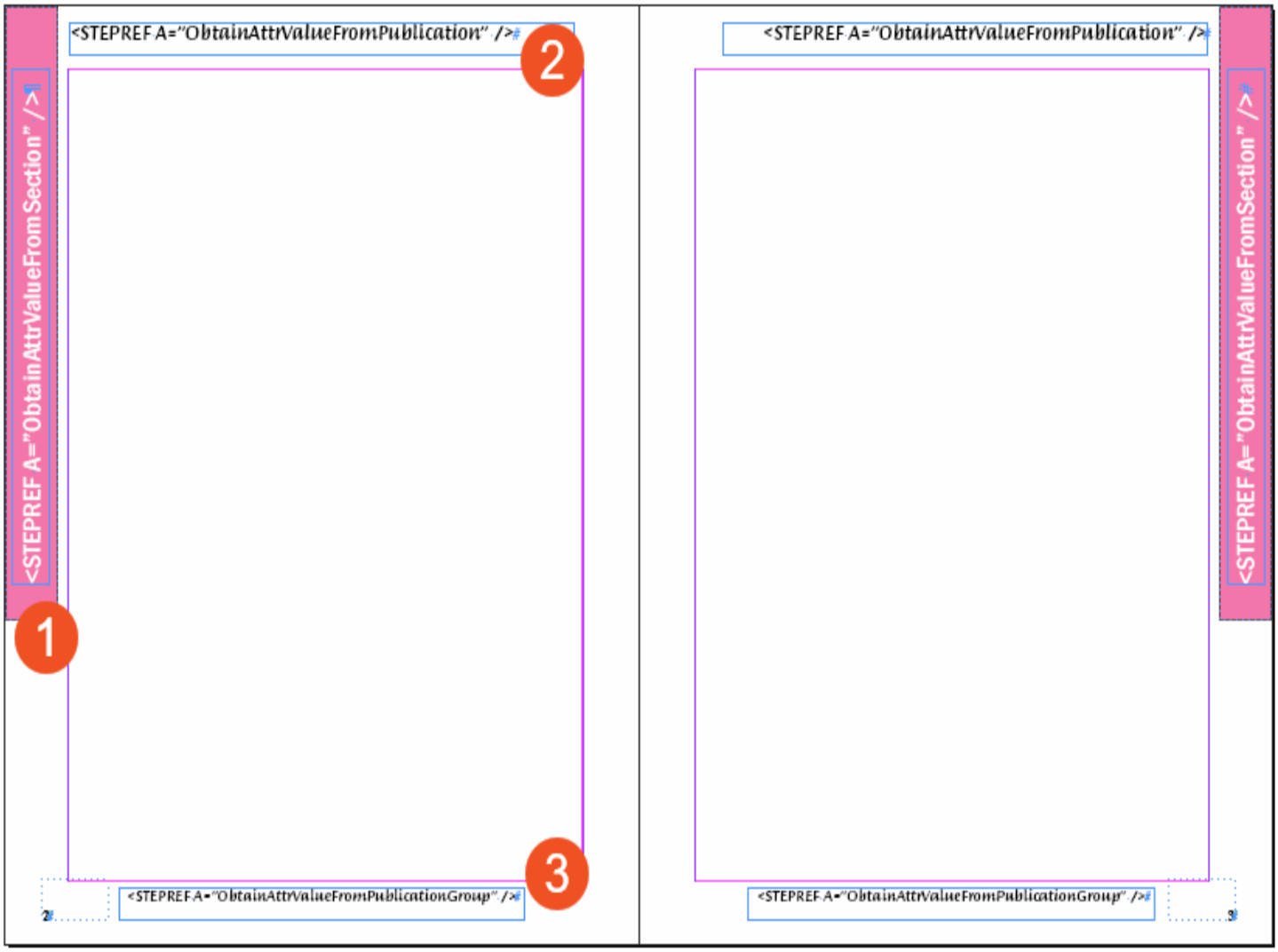
Configuring the Publication Template

Place the attributes on the publication template just as you would place attributes on a product template. See the **Text Frames in Product Templates** section of the **STEP Publisher** documentation for more information.

Note: Attributes must be placed on the page spread(s) of the publication template, not the master spread(s).

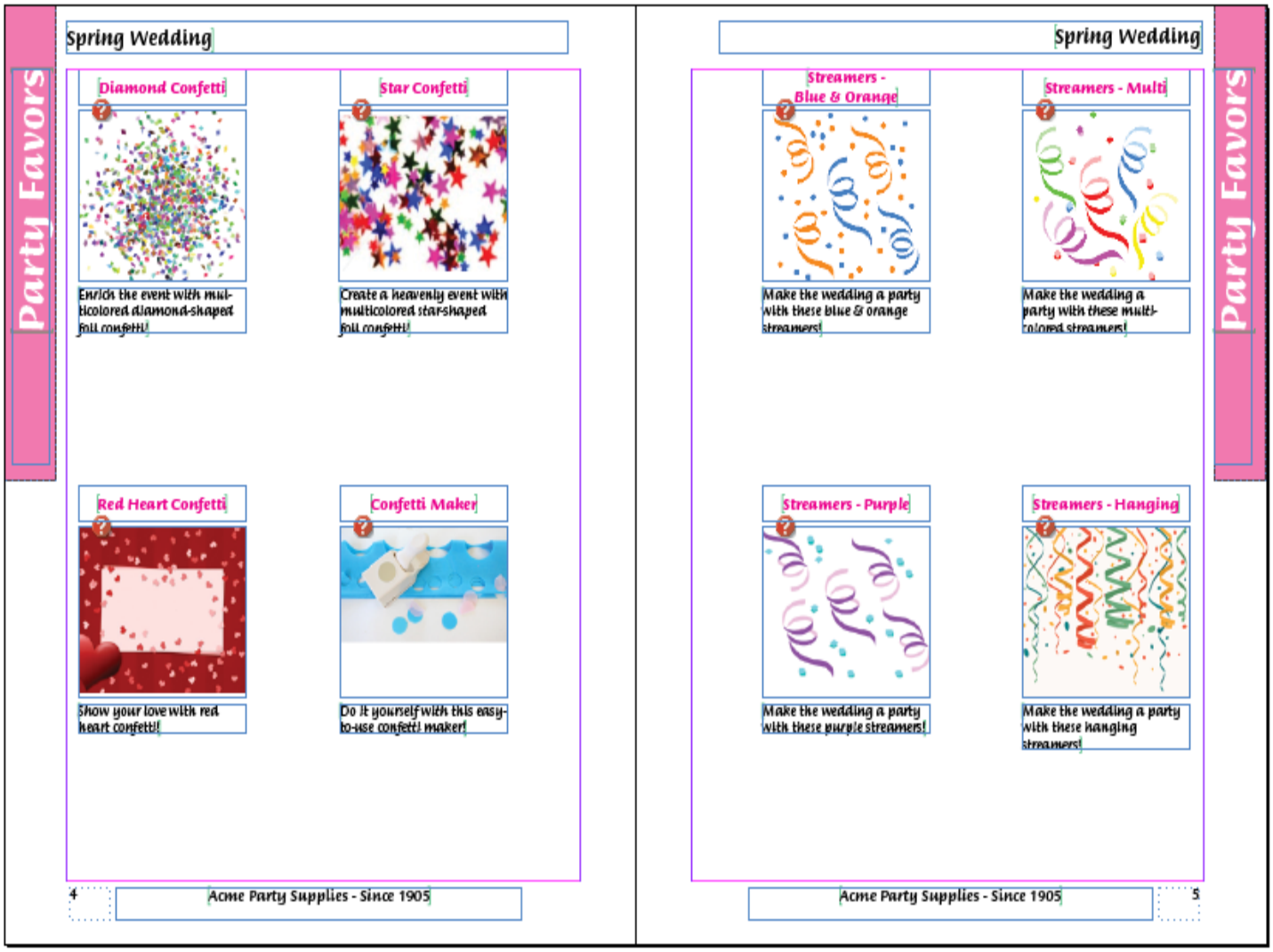
In this example, the attributes and their placement on the pages are as follows:

1. **ObtainAttrValueFromSection** is placed along the sidebars
2. **ObtainAttrValueFromPublication** is placed at the top of the pages
3. **ObtainAttrValueFromPublicationGroup** is placed at the bottom of the pages



Mounted Page Results

After running the autopagination process on your publication, section, or subsection, the publication description attribute values will display on the mounted page in InDesign. For full instructions on the autopagination process, see the **Autopaginating Pages** topic.


Party Favors
Spring Wedding
Diamond Confetti
Enrich the event with multicolored diamond-shaped foil confetti!
Star Confetti
Create a heavenly event with multicolored star-shaped foil confetti!
Red Heart Confetti
Show your love with red heart confetti!
Confetti Maker
Do it yourself with this easy-to-use confetti maker!
4
Acme Party Supplies - Since 1905
Spring Wedding
Streamers - Blue & Orange
Make the wedding a party with these blue & orange streamers!
Streamers - Multi
Make the wedding a party with these multi-colored streamers!
Streamers - Purple
Make the wedding a party with these purple streamers!
Streamers - Hanging
Make the wedding a party with these hanging streamers!
Acme Party Supplies - Since 1905
5
Party Favors

Exporting and Importing AutoPage Publications in STEPXML

AutoPage publications can be exported and imported using the STEPXML format.

This topic explains the manual process for exporting AutoPage publications in STEPXML using the **Export Manager** in the STEP Workbench, the outbound parameters available for AutoPage publications, a sample XML file, and a description of the tags inside the resulting STEPXML file.

Importing an AutoPage Publication in STEPXML

Product, asset, and/or classification objects can be linked to sections of AutoPage publications by importing a STEPXML file. This same file can also be used to create the publication structure, the publication, and to link the relevant publication template and product templates to the publication. An example of a STEPXML file that can be used to import an AutoPage publication is provided later in this topic in the 'File Example' section.

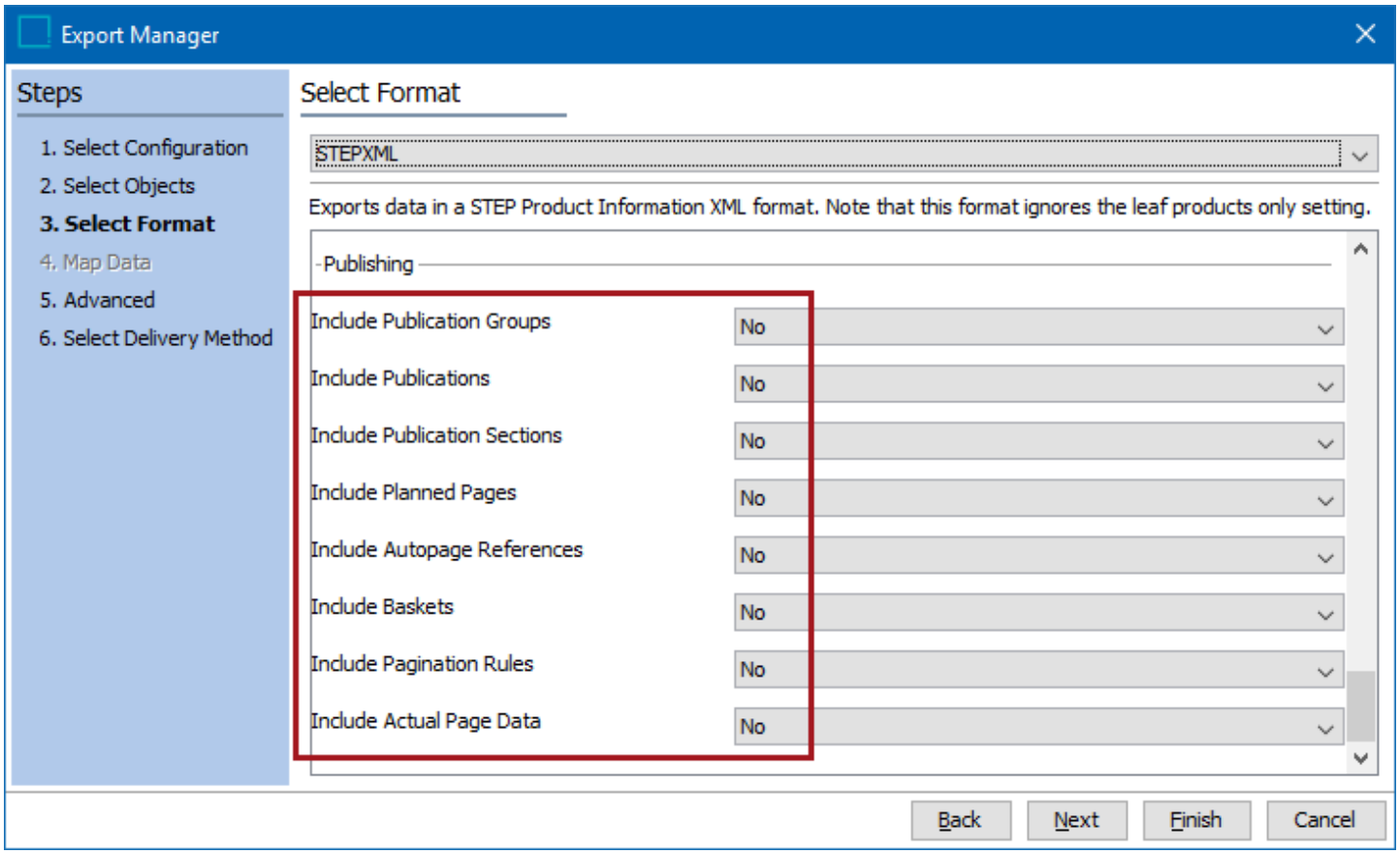
Instructions on how to import the STEPXML file itself are not detailed in this topic since the steps are the same as those for importing any other type of data into STEP using STEPXML. AutoPage publications can be imported manually using the Import Manager or automatically using an inbound integration endpoint (IIEP).

For more information, see the **Import Manager** and **Inbound Integration Endpoints** sections of the **Data Exchange** documentation.

Exporting an AutoPage Publication in STEPXML

The steps to export an AutoPage publication in STEPXML are the same as those for exporting any other type of publication (standard 'drag and drop' or Flatplanner), except additional AutoPage-specific options are chosen when selecting the STEPXML outbound parameters.

1. To initiate the export, follow the initial steps outlined in **Exporting and Importing Publications in STEPXML** in the **STEP Publisher** documentation.
2. On the Select Format screen (step 3), after choosing STEPXML from the dropdown list, navigate to the publication options pictured below and choose the relevant information that you want to include in your export. All other default options can be left as-is (for example, 'Include Products = Minimum).

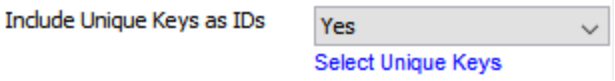


Note: The only options available for publication parameters are 'All' or 'None.' You may need to experiment with the combination of objects selected in the Select Objects step and the 'All' settings chosen in the Select Format step to ensure that you do not get too much or too little information in your export. For instance, if you export from a publication object and select 'All' for 'Include Publication Groups' but 'None' for 'Include Publications,' the export will include all publication groups that exist in your STEP system as well as the single publication selected, even though 'None' was selected for publications.

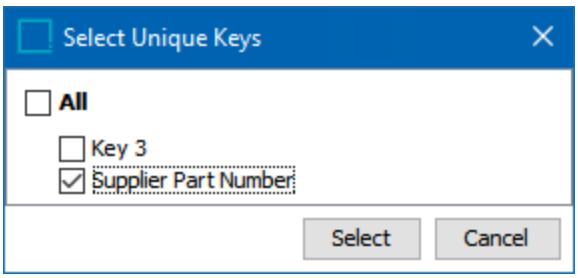
- The following parameters are relevant for **all** types of publications (standard STEP Publisher, Flatplanner, and AutoPage). Information on these parameters and the resulting tags in the STEPXML file are detailed in the **Exporting and Importing Publications in STEPXML** topic in the **STEP Publisher** documentation.
  - Include Publications
  - Include Publication Groups
  - Include Publication Sections
  - Include Actual Page Data: relevant if you have saved mounted DTP documents into your publication
- The following options are valid for **AutoPage** publications.
  - Include Autopage References
  - Include Pagination Rules

Note: Include Autopage References is also relevant for standard 'drag and drop' publications if objects have been linked to the publication sections to organize them for mounting. However, it is more common practice to link objects to sections in AutoPage publications.

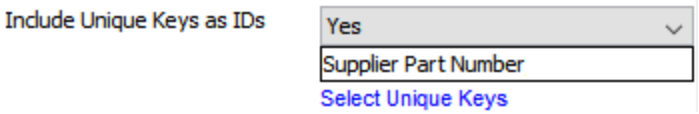
3. Select 'Yes' for **Include Unique Keys as IDs** if you are using unique keys to identify objects linked to your sections.



- To select the desired Unique Keys to use for this process, click the 'Select Unique Keys' link. The 'Select Unique Keys' dialog shows all active keys in the STEP system. Choose the keys to export, then click 'Select.'



- The selected Unique Keys will be shown in the Export Wizard.



4. The Map Data step is skipped as with any other STEPXML export, since data is not mapped in the STEPXML format.
5. The options in the Advanced step and the Select Delivery Method step are the same as those available for any other type of STEPXML export. See **Export Manager - Advanced** and **Export Manager - Select Delivery Method** in the **Export Manager** documentation for more information.

Note: Though the **Select version used to resolve tables** option references publication versions, this setting is only relevant if the 'Include Tables' parameter is set to 'Yes' in the Select Objects step. This setting has no impact on publication-only exports. For more information, see the **Exporting Resolved Tables** topic in the **Tables** documentation.

File Example

The following STEPXML sample shows an export from an AutoPage publication that contains two versions, three sections, and metadata attributes on the publication and section objects. Each section contains linked objects—products, assets, and classifications.

```
<STEP-ProductInformation ExportContext="Context1" ContextID="Context1"
WorkspaceID="Main" UseContextLocale="false">
<PublicationGroups>
  <PublicationGroup UserTypeID="Publication group root"
ParentID="108372" ID="115722">
    <Publication UserTypeID="Default publication type"
MasterDocumentID="107822" DTPType="InDesign" ParentID="108372"
ID="111508">
      <Name>Beta Tools</Name>
      <MetaData>
        <Value AttributeID="LastPageNumber" Derived="true">0</Value>
      </MetaData>
      <Version ContextID="Context1" WorkspaceID="Main" ID="111511">
        <Name>English US</Name>
      </Version>
      <Version ContextID="Context2" WorkspaceID="Main" ID="111510">
      <Name>France FR</Name>
      </Version>

<PaginationRules>PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ
1bGVzIFZlcnNpb249IjMiLz4=</PaginationRules>
      <ProductTemplateLink ProductTemplateID="107821"/>
      <PublicationSection ID="111512" UserTypeID="Section">
        <Name>Power Tools</Name>
        <MetaData>
          <Value AttributeID="LastPageNumber" Derived="true">0</Value>
          <Value AttributeID="FirstPageNumber" Derived="true">0</Value>
        </MetaData>

<PaginationRules>PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ
1bGVzIFZlcnNpb249IjMiLz4=</PaginationRules>
        <AutoPageProductLink ProductID="20803"/>
        <AutoPageProductLink ProductID="20805"/>
        <AutoPageProductLink ProductID="100703"/>
      </PublicationSection>
      <PublicationSection ID="111513" UserTypeID="Section">
        <Name>Hand Tools</Name>
```

```
        <MetaData>
          <Value AttributeID="LastPageNumber" Derived="true">0</Value>
          <Value AttributeID="FirstPageNumber" Derived="true">0</Value>
        </MetaData>

<PaginationRules>PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ
1bGVzIFZlcnNpb249IjMiLz4=</PaginationRules>
        <AutoPageProductLink ProductID="20714"/>
        <AutoPageProductLink ProductID="20726"/>
        <AutoPageProductLink ProductID="21873"/>
      </PublicationSection>
      <PublicationSection ID="111514" UserTypeID="Section">
        <Name>Toolboxes</Name>
        <MetaData>
          <Value AttributeID="LastPageNumber" Derived="true">0</Value>
          <Value AttributeID="FirstPageNumber" Derived="true">0</Value>
        </MetaData>

<PaginationRules>PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ
1bGVzIFZlcnNpb249IjMiLz4=</PaginationRules>
        <AutoPageProductLink ProductID="20881"/>
        <AutoPageProductLink ProductID="7829"/>
        <AutoPageProductLink ProductID="20682"/>
        <AutoPageAssetLink AssetID="22328"/>
        <AutoPageClassificationLink
ClassificationID="IllustrationRoot"/>
      </PublicationSection>
    </Publication>
  </PublicationGroup>
</PublicationGroups>
```

AutoPage Information Included in the Export

The following sections explain the AutoPage information included in the STEPXML file.

Include Pagination Rules

```
<PaginationRules>
PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ1bGVzIFZlcnNpb249IjIiPgogID
xQYWdpbmF0aW9uUnVsZUdyb3VwPgogICAgPFBhZ2luYXRpb25SdWxlIFR5cGU9IlByb2R1Y3RUZW1wbGF0
ZUFjdGlvbiIgT3ZlcnJpZGRlbj0iMTA4MjAyLTEiIElkPSIxMDgyMDItMSI+CiAgICAgIDxDb25kaXRpb2
5zPgogICAgICAgIDxDb25kaXRpb24gSUQ9IkFsd2F5c0NvbmRpdGlvbiI+CiAgICAgICAgICA8UGFyYW1l
dGVycy8+CiAgICAgICAgPC9Db25kaXRpb24+CiAgICAgIDwvQ29uZGl0aW9ucz4KICAgICAgPEFjdGlvbn
M+CiAgICAgICAgPEFjdGlvbiBJRD0iUHJvZHVjdFRlbXBsYXRlQWN0aW9uIiBUeXBlPSJQcm9kdWN0VGVt
cGxhdGVBY3Rpb24iPgogICAgICAgICAgPFBhcmFtZXRlcnM+CiAgICAgICAgICAgIDxQYXJhbWV0ZXIgSU
Q9InRlbXBsYXRlSUQiPmNvbS5zdGliby5jb3JlLnBlcnNpc3RlbmNlLk5vZGVQTy0yMDg2NDAzPC9QYXJh
bWV0ZXI+CiAgICAgICAgICAgIDxQYXJhbWV0ZXIgSUQ9InRlbXBsYXRlVGl0bGUiPldlZGRpbmcgUHJvZC
BUZW1wPC9QYXJhbWV0ZXI+CiAgICAgICAgICA8L1BhcmFtZXRlcnM+CiAgICAgICAgPC9BY3Rpb24+CiAg
ICAgIDwvQWN0aW9ucz4KICAgIDwvUGFnaW5hdGlvblJ1bGU+CiAgPC9QYWdpbmF0aW9uUnVsZUdyb3VwPg
o8L1J1bGVzPg==</PaginationRules>
```

Pagination rules are included in encrypted strings in STEPXML files. As such, no additional information is available. However, pagination rule strings are consistent, and as such can be copied and pasted between files for reimport.

Include Autopage References

```
<PublicationSection ID="177998" UserTypeID="Section">
  <Name>Toolboxes</Name>
  <AutoPageClassificationLink ClassificationID="AssetsRoot"/>
  <AutoPageProductLink ProductID="18210"/>
  <AutoPageProductLink ProductID="18212"/>
  <AutoPageProductLink ProductID="18213"/>
  <AutoPageProductLink ProductID="18216"/>
  <AutoPageProductLink ProductID="100914"/>
  <AutoPageProductLink ProductID="100305"/>
  <AutoPageProductLink ProductID="18207"/>
  <AutoPageProductLink ProductID="18214"/>
  <AutoPageProductLink ProductID="18215"/>
  <AutoPageAssetLink AssetID="22328">
</PublicationSection>
```

Tag	Description
<AutoPageClassificationLink/>	Returns the STEP ID of the linked classification object
<AutoPageProductLink/>	Returns the STEP ID of the linked product object
<AutoPageAssetLink/>	Returns the STEP ID of the linked asset object

Include Unique Keys as IDs

```
<PublicationSection ID="109032" UserTypeID="Section">
  <AutoPageClassificationLink ClassificationID="">
    <KeyValue KeyID="SupplierPartNumber">123456G</KeyValue>
  </AutoPageClassificationLink>
  <AutoPageProductLink ProductID="">
    <KeyValue KeyID="SupplierPartNumber">20728</KeyValue>
  </AutoPageProductLink>
  <AutoPageProductLink ProductID="">
    <KeyValue KeyID="SupplierPartNumber">050-4215I</KeyValue>
  </AutoPageProductLink>
  <AutoPageProductLink ProductID="">
    <KeyValue KeyID="SupplierPartNumber">555-22346</KeyValue>
  </AutoPageProductLink>
  <AutoPageProductLink ProductID="">
    <KeyValue KeyID="SupplierPartNumber">555-223461</KeyValue>
  </AutoPageProductLink>
</PublicationSection>
```

Tag	Description
<AutoPageProductLink/>	Normally, this tag returns the STEP ID of the linked product object (for example, ProductID="12345"); however, when a unique key is used instead of a STEP ID, no value is returned (ProductID="").
<AutoPageClassificationLink/>	Normally, this tag returns the STEP ID of the linked classification object (for example, ClassificationID="12345"); however, when a unique key is used instead of a STEP ID, no value is returned (ClassificationID="").
<AutoPageAssetLink/> *(Not pictured in above screenshot)*	Normally, this tag returns the STEP ID of the linked asset object (for example, AssetID="12345"); however, when a unique key is used instead of a STEP ID, no value is returned (AssetID="").
<KeyValue>	Returns the ID of the unique key being used to identify the linked object (KeyID) along with the key value, which is inside the tags for the object.

Exporting and Importing AutoPage Publications in Publication Excel

AutoPage publications can be exported and imported in an Excel format called **Publication Excel**. The Publication Excel format supports all publication types: standard STEP Publisher ('drag and drop'), Flatplanner, and AutoPage.

Note: The Publication Excel format is only available when exporting from the publication level. It is not available for exports from the publication group level or section level.

The following screenshots show a sample Publication Excel spreadsheet for an AutoPage publication. The Publication Excel format only allows one object per row.

	A	B	C	D	E	F
1	PublicationID	PublicationName	PublicationType	PublicationTemplateID	PublicationInheritedUnit	PubPageTemplateID
2	127311	Zeta Tools	Default publication type	110116	inches	
3						

	G	H	I	J	K	L	M
1	VersionID	VersionName	VersionContextID	VersionWorkspaceID	LayerMappingTemplate	LayerMappingDocument	LayerMappingOwner
2							
3							
4	127314	French FR	Context2	Main			
5					France	France	true
6					Images	Images	false
7	127313	English US	Context1	Main			
8					USA	USA	true
9					Images	Images	true
10	127315	English UK	Context7	Main			
11					UK	UK	true
12					Images	Images	false

	N	O	P	Q	R	S	T	U	V	W
1	SectionLevel	SectionID	SectionName	SectionTypeID	MetaDataAttributeID	MetaDataAttributeValue	RuleSettings	ProductTemplateID	LinkedObjectID	LinkedObjectType
2							<Action ID="ProductTemplateAction" Type="ProductTemplateAction"			parametertemplateID=
3					CatalogTheme	Zeta Tools 2016				
4										
5								107821		
6								108803		
7	1	109032	Toolboxes	Section			<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadInde			
8					SectionTheme	Toolboxes				
9									20881	Product
10									7829	Product
11									20682	Product
12									6806	Product
13	1	109148	Nails and Screws	Section						
14					SectionTheme	Nails and Screws				
15									8108	Product
16									20674	Product
17									7829	Product
18									101118	Product
19									107628	Asset
20									107629	Asset
21	1	109033	Garden Tools	Section			<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadInde			
22					SectionTheme	Garden Tools				
23	2	110370	Weed Trimmers	Section						
24	3	110379	Electric	Section						
25	4	110395	Corded	Section						
26	5	110399	25' Cords	Section						
27									109952	Product
28									109951	Product
29									109955	Product
30	5	110403	50' Cords	Section						
31									110049	Product
32									110050	Product
33									109953	Product
34									109954	Product

Information Included in the Export

A comprehensive guide to the contents of Publication Excel exports is located in the **Exporting Publications in Excel** section of the **STEP Publisher** documentation.

The following table outlines additional information included in a Publication Excel file used for an AutoPage publication.

Column Header	Description
RuleSettings	Pagination rules used in the publication(s) and sections **Example**: <Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parametertemplateSpreadIndex="1"> <Condition ID="AlwaysCondition" /> </Action>

Column Header	Description
LinkedObjectKeyID	The ID of the unique key used to identify the product, asset, or classification object linked into the section(s).
LinkedObjectID	STEP ID of the product, asset, or classification object linked into the section(s). If a unique key is being used instead of a STEP ID to identify linked objects, then the value of the unique key will display instead.
LinkedObjectType	Value will either be 'Product', 'Asset', or 'Classification' depending on whether a product, asset, or classification object is linked to the section(s). 'Product', 'Asset', and 'Classification' are generic terms and do not specify the exact object types of the product, asset, or classification.

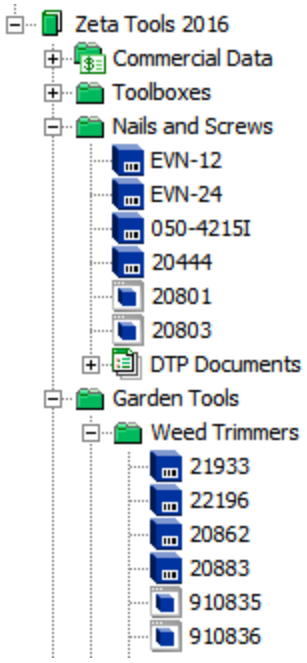
Location of AutoPage Publication Excel Information in STEP

A comprehensive guide to the location of publication information in the STEP Workbench that is included in a Publication Excel sheet is located in the **Exporting Publications in Excel** section of the **STEP Publisher** documentation.

The following subsections describe the additional information included in a Publication Excel file used for an AutoPage publication.

Linked Products and Assets

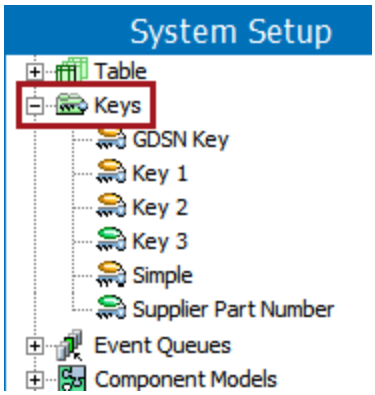
The pictured sample AutoPage publication contains product objects and asset objects linked to the publication sections. Note that classification objects can also be linked to AutoPage publications, but this is uncommon.



- The **LinkedObjectKeyID** column (not pictured in the previous spreadsheet screenshots) contains the ID of the unique key used to identify the product, asset, or classification object linked into the section(s).

LinkedObjectKeyID	LinkedObjectID
SupplierPartNumber	22487-123
SupplierPartNumber	22487-12
SupplierPartNumber	20444
	107628
	107629

Keys are located on the System Setup tab. For information on unique keys, see the **Unique Keys** section of the **System Setup** / **Super User Guide** documentation.



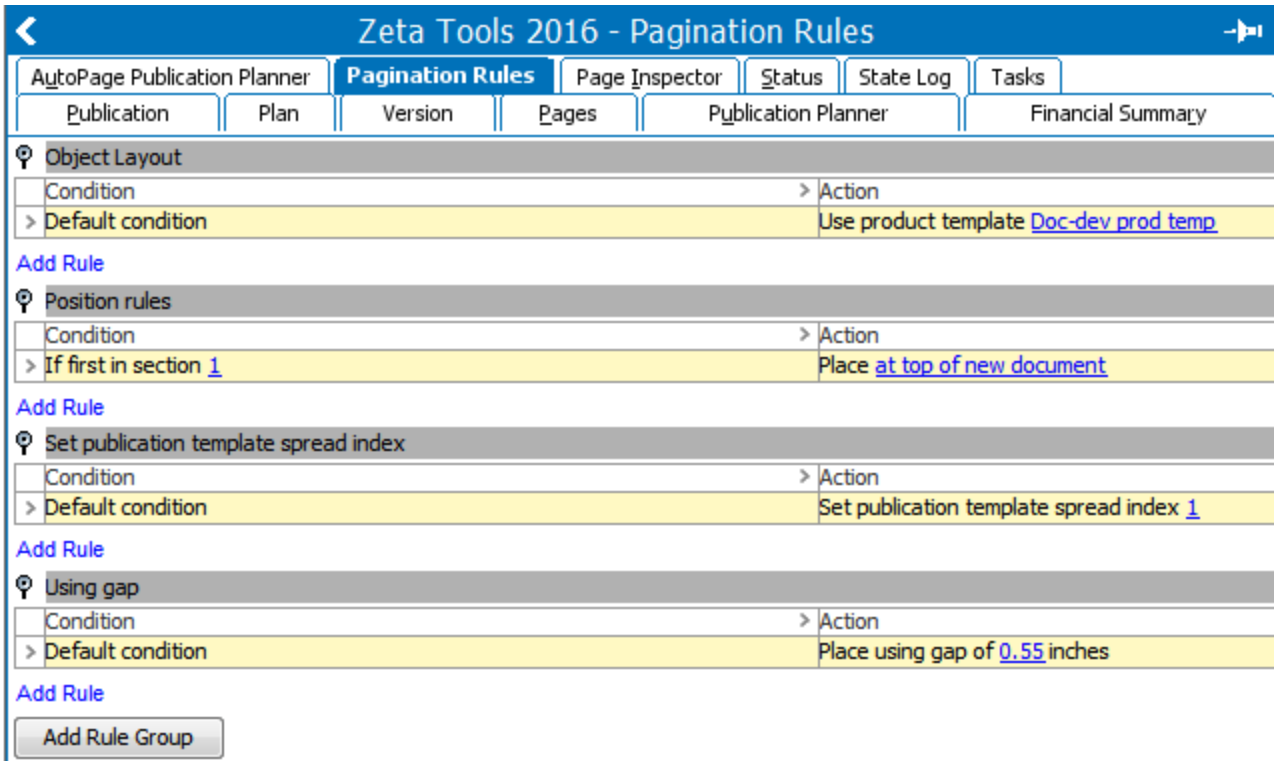
- The **LinkedObjectID** column contains the STEP ID(s) of the objects linked to each section. If a unique key is being used instead of a STEP ID to identify linked objects, then the value of the unique key will display instead.

Pagination Rules Tab

STEPXML code for **Pagination Rules** linked to the publication and/or sections are included in the **RuleSettings** column. The screenshot below shows four pagination rules set at the top level of the publication.

If a publication has no pagination rules set yet, the **RuleSettings** column will not appear on the exported sheet.

Note: When exporting a 'model' publication in order to use the resulting Publication Excel sheet as a template for later publication imports, it is recommended to manually set up the desired pagination rules first. This ensures that the **RuleSettings** column appears on the 'template' sheet and will not have to be manually inserted later.

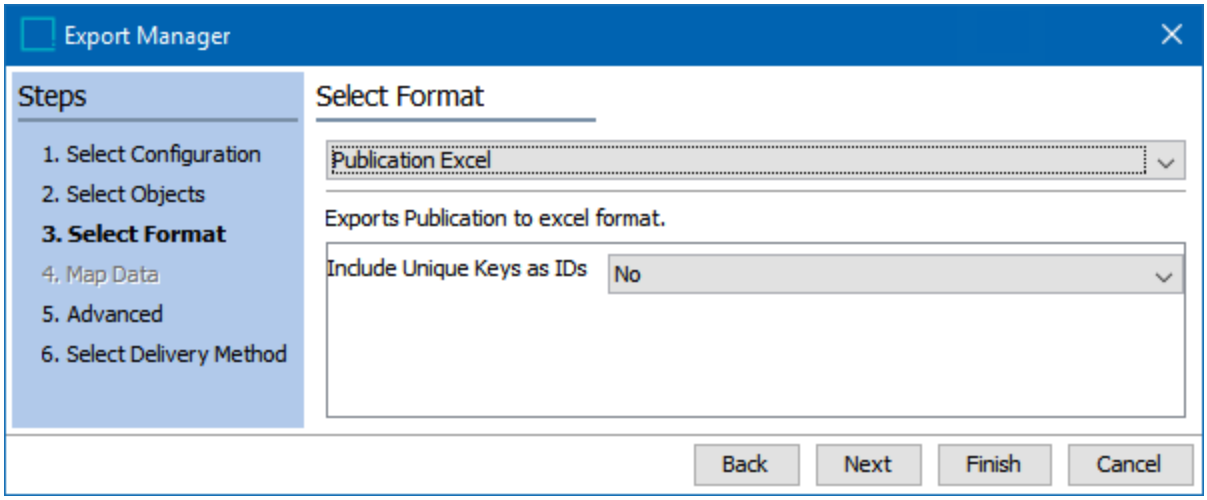


Exporting AutoPage Publications in Publication Excel

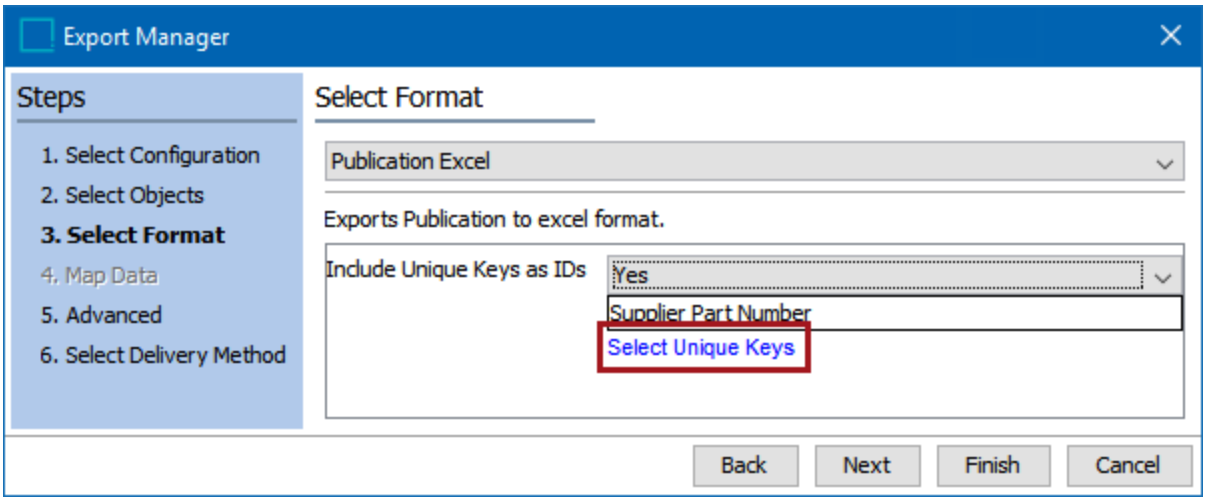
The steps to export an AutoPage publication in the Publication Excel format are nearly identical to those of exporting a standard 'drag and drop' publication except some additional information is included for AutoPage publications—pagination rules and the identifiers used for linking objects to sections (STEP ID and/or unique key values).

1. Follow the initial steps for exporting a Publication Excel sheet as outlined in the **Exporting a Publication Excel Sheet** topic in the **STEP Publisher** documentation.

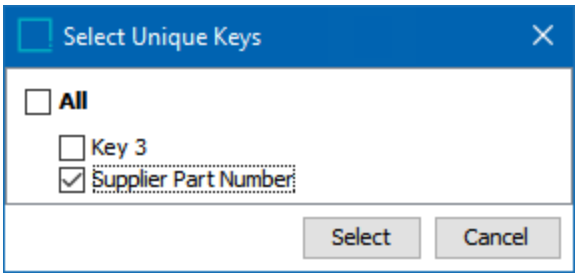
2. On the Select Format screen of the Export Manager, choose **Publication Excel** from the dropdown list. If you are not using unique keys to identify the objects (typically *products*) that are linked into the publication's sections, click **Next**.



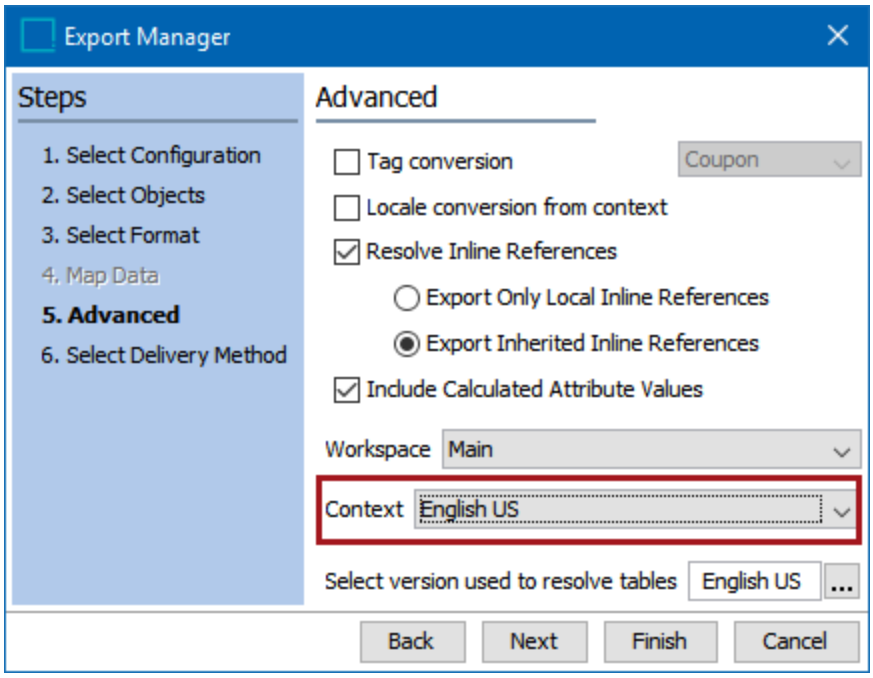
- If you *are* using unique keys to identify the objects linked into the publication, select 'Yes' from the 'Include Unique Keys as IDs' dropdown list, then click **Select Unique Keys**.



- On the Select Unique Keys dialog, all associated keys on the objects linked into the publication are displayed. Check the box(es) for the unique key values that should be included in the export, then click **Select**.



3. Since data does not need to be mapped for the Publication Excel format, the Map Data screen is skipped.
4. On the Advanced screen, choose a **Context** if you have dimension-dependent data section names or page names and need to see them in a particular language. All other settings may be ignored. Click **Next**.



5. Choose **File** as the Delivery Method in Step 6, then click **Finish**.
6. On the **Save Export Configuration** screen, check 'Save Options' if you would like to save the Export configuration.
7. Click **OK**, then retrieve the Excel file.

Considerations and Limitations

- Though multiple publications may be exported in a single Publication Excel file, multiple publications may not be *imported* in the Publication Excel format. To import multiple publications at once, the STEPXML format must be used. For information on importing publications in STEPXML, see the **Exporting and Importing Publications in STEPXML** topic.
- Support for Publication Excel export is not available in the Web UI.

- All pagination rules are exported in a single cell. If the exported publication has numerous rules, the character count can grow into the thousands. If the pagination rules character count exceeds 32,767 characters, an error will occur. If the system property `PublicationExcelExport.OneRulePerCell=true` is added to the sharedconfig.properties file, then only one rule will display per row.

Importing AutoPage Publications in Publication Excel

The steps to import or update an AutoPage publication using a Publication Excel sheet are identical to those of importing a Publication Excel for any other publication type.

For step-by-step **Publication Excel** import instructions, see the **Importing a Publication Excel Sheet** section of the **STEP Publisher** documentation.

Mandatory and Optional Information for AutoPage Publication Excel Imports

A comprehensive list of mandatory and optional information for Publication Excel imports is listed in the **Importing Publications in Excel** section of the **STEP Publisher** documentation. The below table addresses the AutoPage-specific fields.

Column Header	Description	Mandatory?
RuleSettings	Pagination Rules used in the publication(s) and sections **Example**: <Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parametertemplateSpreadIndex="1"> <Condition ID="AlwaysCondition" /> </Action>	No
LinkedObjectKeyID	If using unique keys instead of STEP IDs to identify objects linked to the section, this column will contain the ID of the unique key associated with the object. For more information on unique keys, see the **Unique Keys** topic in the **System Setup / Super User Guide** documentation.	No
LinkedObjectID	STEP ID of the product, asset, or classification object linked into the section(s)	No (**Yes** if you have provided a LinkedObjectKeyID)
LinkedObjectType	Value will either be 'Product', 'Asset', or 'Classification' depending on whether a product, asset, or classification object is linked to the section(s).	No (**Yes** if you have provided a

Column Header	Description	Mandatory?
	'Product', 'Asset', and 'Classification' are generic terms and do not specify the exact object types of the product, asset, or classification.	LinkedObjectID, as the possibility exists that a product object could share the same STEP ID as an asset or classification object)

Flatplanner

The Flatplanner publishing component helps companies make more educated product choices and produce 'intelligent catalogs' that improve sales. The visual page briefing tools of Flatplanner replace 'lick and sticker' paper briefing.

Flatplanner includes tools that enable advanced collaboration, automation, and analysis, which make selecting products for publications easier and more efficient.

In addition, Flatplanner provides a single interface for business users to plan, review, and analyze publications. Creative users can access the publication plan from within Adobe InDesign by using the STEP Publisher plugins ('STEP'n'design'). Merchandisers can review and approve artwork at any time through Flatplanner. And, workflow tools within STEP ensure that tight deadlines stay on track by alerting users to prioritize tasks.

Note: Supported versions of Adobe InDesign are CC 2022 (CC17), CC 2021 (CC16), CC 2020 (CC15), and CC 2019 (CC14).

Note: To use the Flatplanner component, the STEP Publisher component is required. To use a Flatplanner workflow, the STEP Workflow component is required.

Prerequisites

This documentation section / user guide assumes the following:

- A working knowledge of STEP
- A working knowledge of InDesign
- An understanding of how to work with the publication hierarchy in STEP. For more information, see the **Publication Hierarchy** section of the **STEP Publisher (InDesign)** documentation.
- An understanding of the basics of STEP Publisher, such as the creation of publication templates, product templates, and page mounting. For more information, see the **STEP Publisher** section of the **STEP Publisher (InDesign)** documentation.

A Note on Page Terminology in this Guide

The terms 'planned page,' 'Flatplan page,' 'Flatplan,' and 'spread' refer to the same page object in Flatplanner and are used interchangeably in this guide. Since most Flatplanner pages are planned in two-page spreads, the term 'spread' is frequently used to refer to any planned page. However, since planned pages can also be single pages, the term 'planned page' or 'page' may be used instead of 'spread.'

Creating a Publication in Flatplanner

This topic serves as a quick start, high-level guide for manually creating a Flatplanner publication in the STEP Workbench. For information on how to create a Flatplanner publication through an import, see the **Exporting and Importing Flatplanner Publications** section of this guide.

Create Templates

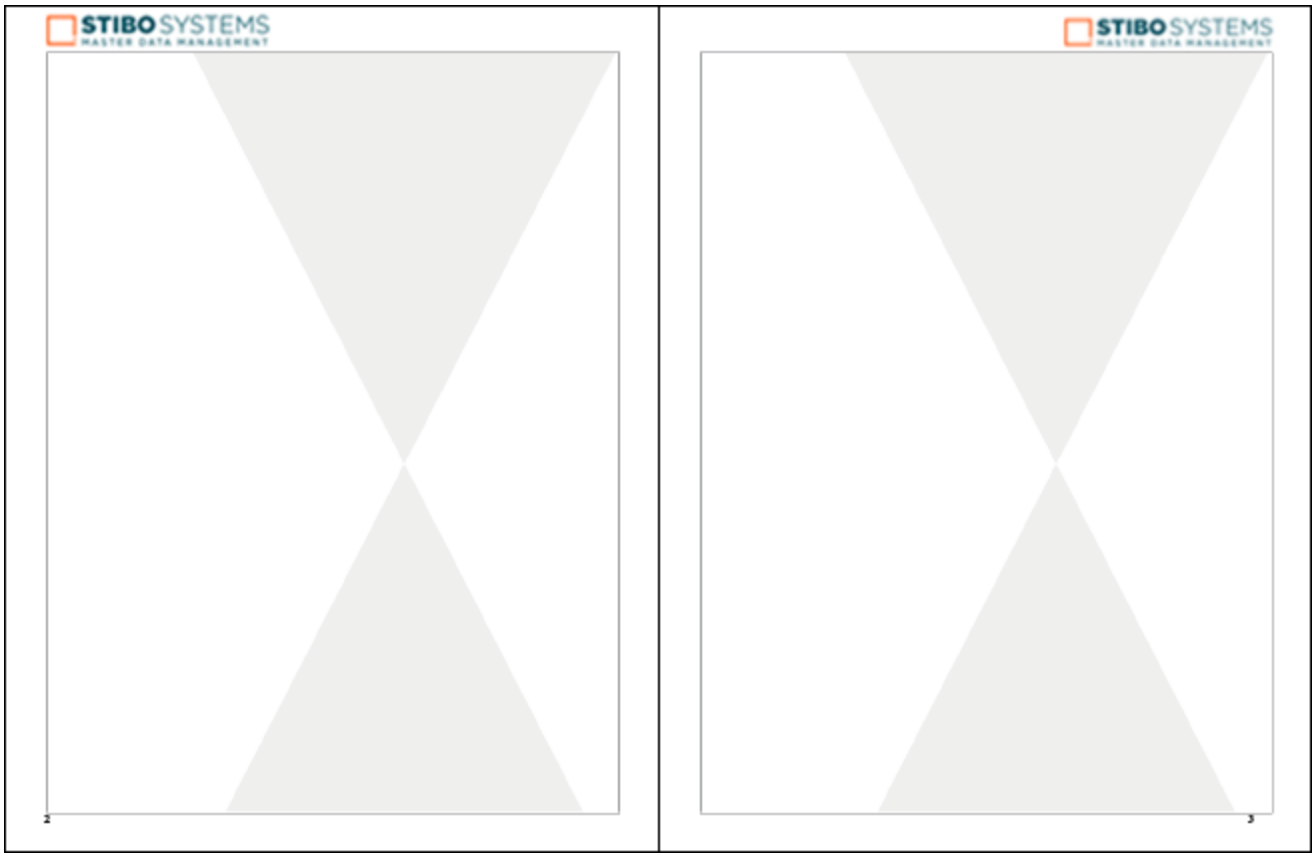
The following templates are used in Flatplanner publications: publication template, product template, and page template.

Publication Template

Create a **publication template** in InDesign that will define the size and margins of your Flatplanner pages, then save this template to STEP.

The publication template is the backbone of Flatplanner planned pages and must be created before **page templates**, since the publication template is the InDesign document that defines the page size and margins that will be used throughout the publication. Publication templates contain information about static elements such as page tabs ('furniture'), as well as the definitions of all paragraph styles, character styles, color swatches, etc., that will be used to build pages. The publication template is also used to build Flatplanner pages in InDesign and generate PDFs and page previews from the STEP Workbench.

See the **Publication Templates** section of the **STEP Publisher** documentation for more information.

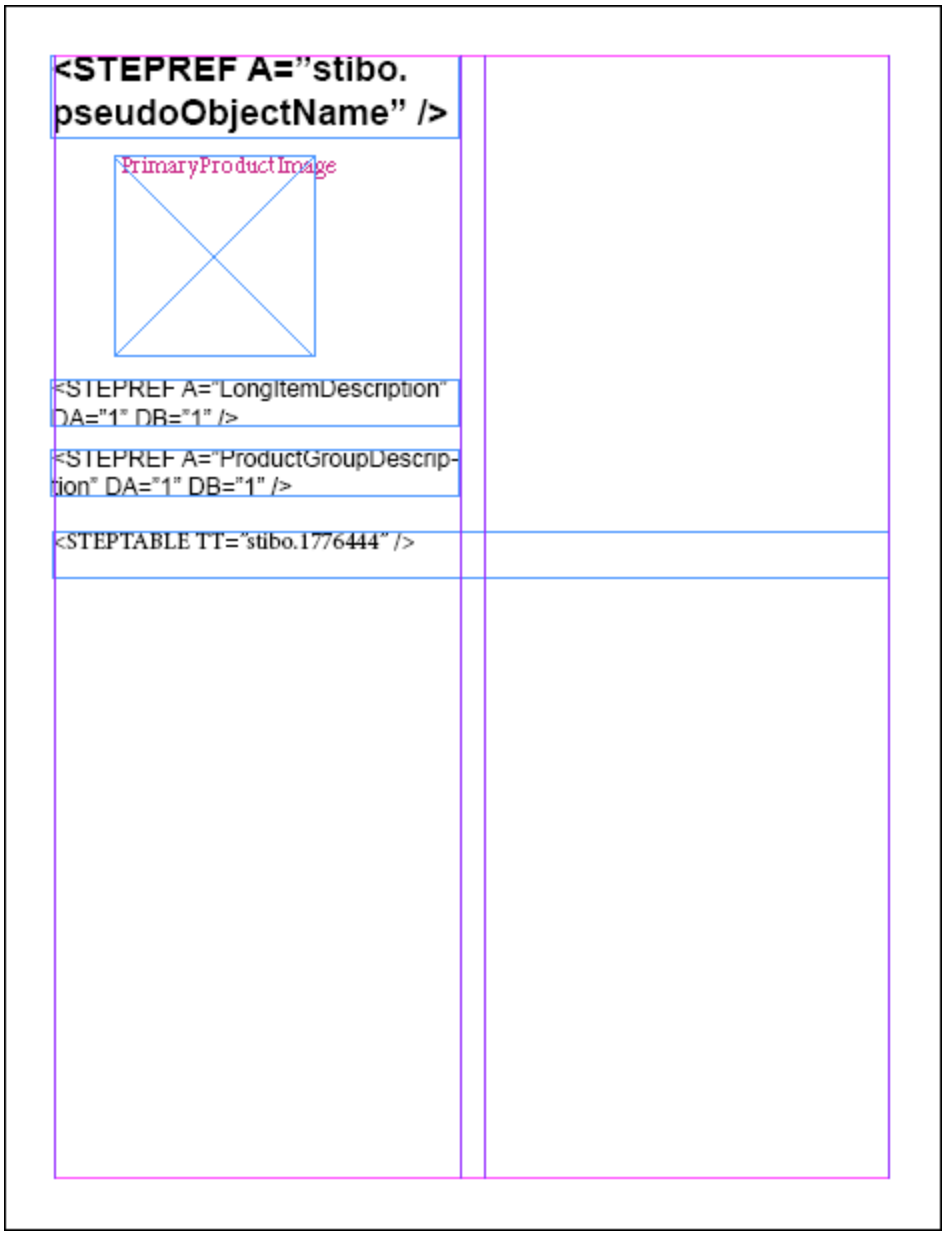


Product Templates

Create at least one **product template** in InDesign that will define the product layout(s) on your pages, then save the template(s) to STEP.

Product templates are linked to Flatplanner page frames to drive the content that displays within each frame on the page. The product template controls which attributes are part of the product presentation; the formatting of the product presentation, such as fonts, styles, colors, and so on; and the position of these individual elements.

See the **Product Templates** section of the **STEP Publisher** documentation for more information.

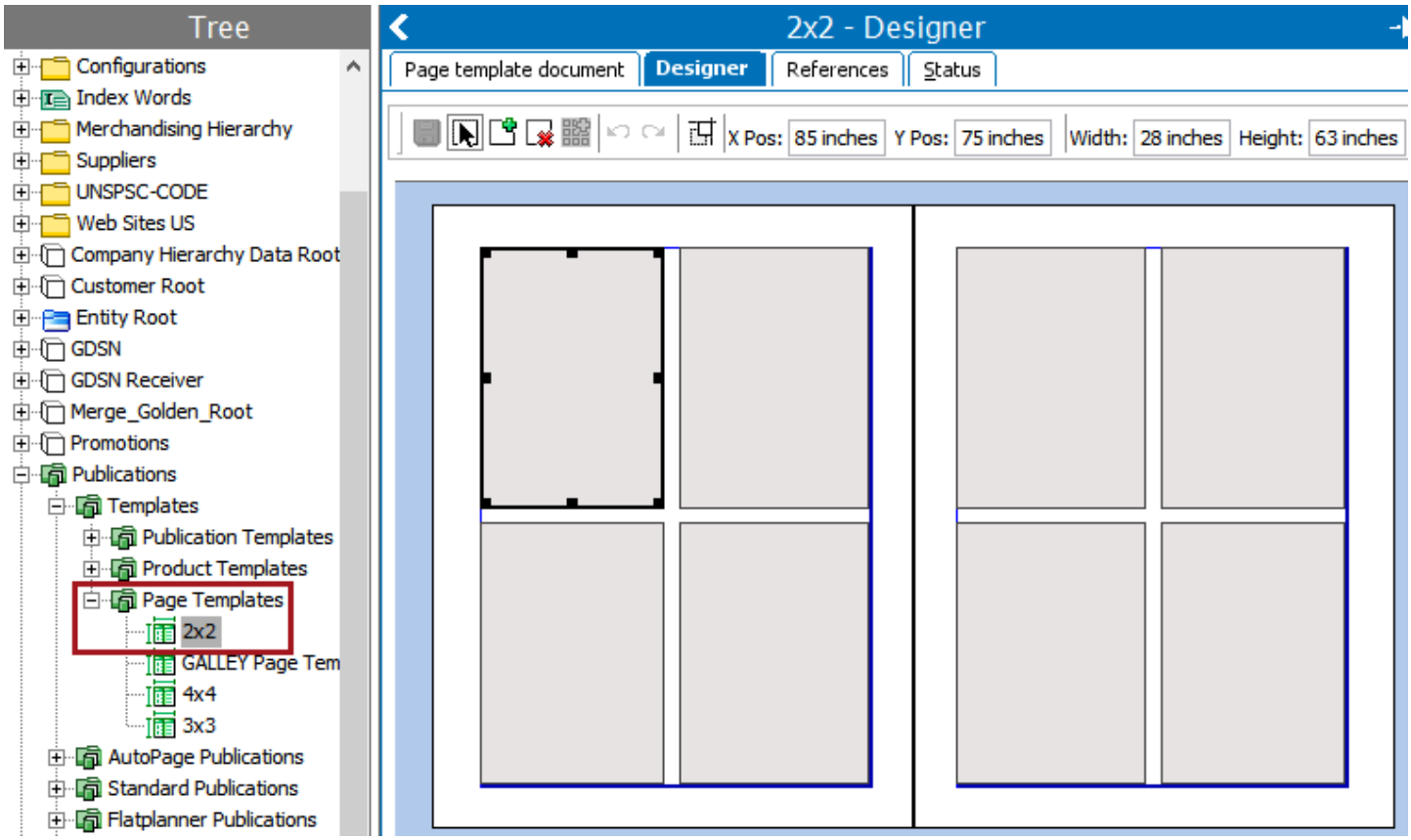


Page Templates

Create at least one **page template** in STEP that will define the overall layout(s) of your pages.

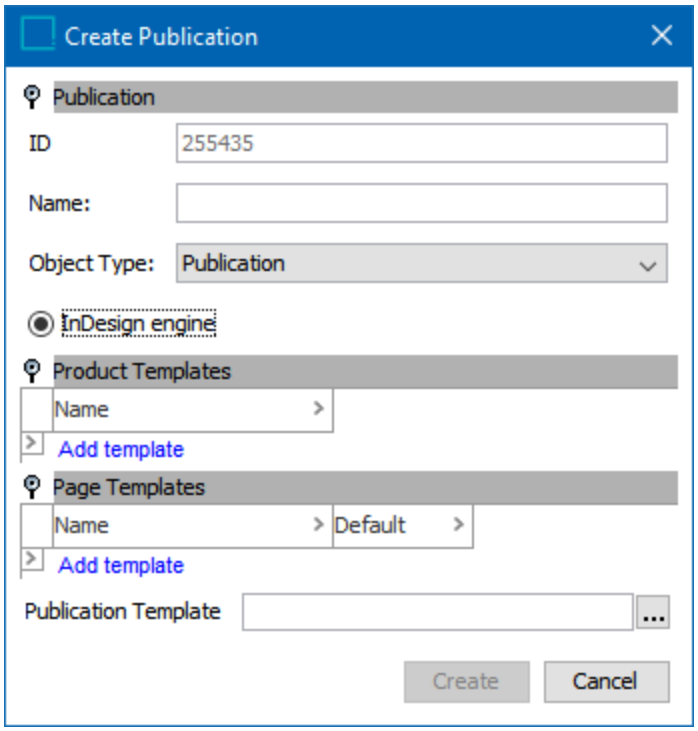
Page templates are unique to Flatplanner and are the only type of template that can be created from within the STEP Workbench. These templates drive the layout of pages through the use of **frames**, which are typically created in a grid format.

For more information on page templates, see the **Flatplanner Page Templates** section of this guide.



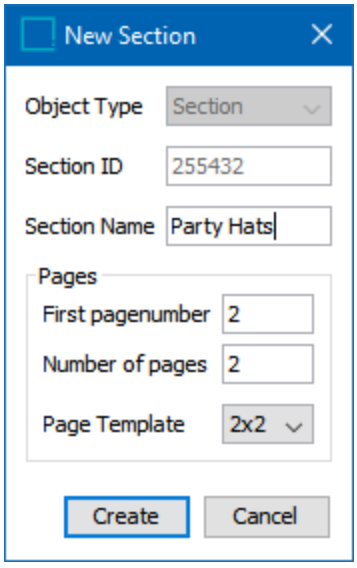
Create a Publication in the Tree

Create a **publication** in the green publication hierarchy in the Tree and assign the relevant publication template, product template(s), and page template(s) to the publication. For more information, see **Creating a Publication** in the 'Publication Hierarchy' section of the **STEP Publisher** documentation.



Create Sections and Planned Pages Within the Publication

Create at least one **section** within the publication, specifying the number of pages that should exist in the section, as well as the page template(s) to be used on the pages. Pages can be added, removed, or rearranged later in the Publication Planner, if needed. For more information, see **Creating a Section** in the 'Publication Hierarchy' section of the **STEP Publisher** documentation.



Determine and Organize Product Selection

Before building Flatplanner pages, the selection of products, assets, and (less commonly) classifications that will be used on each page should be determined, then organized. The recommended organization tool in Flatplanner is the **Basket**.

Flatplanner baskets store and organize the objects that will be linked to frames on Flatplanner planned pages throughout a publication. They can be accessed at the publication, section, and spread level. For more information, see the **Flatplanner Baskets** section of this guide.

Build Flatplanner Pages

The bulk of the work done in Flatplanner happens in the **Flatplanner** pane on the **Plan** tab. This is where frames are positioned on planned pages; product templates are applied to these frames; products, assets, or classifications are linked to these frames through drag and drop operations; and more. For more information, see the **Working with Frames n Flatplanner Pages** section of this guide.

Plan and Organize the Publication

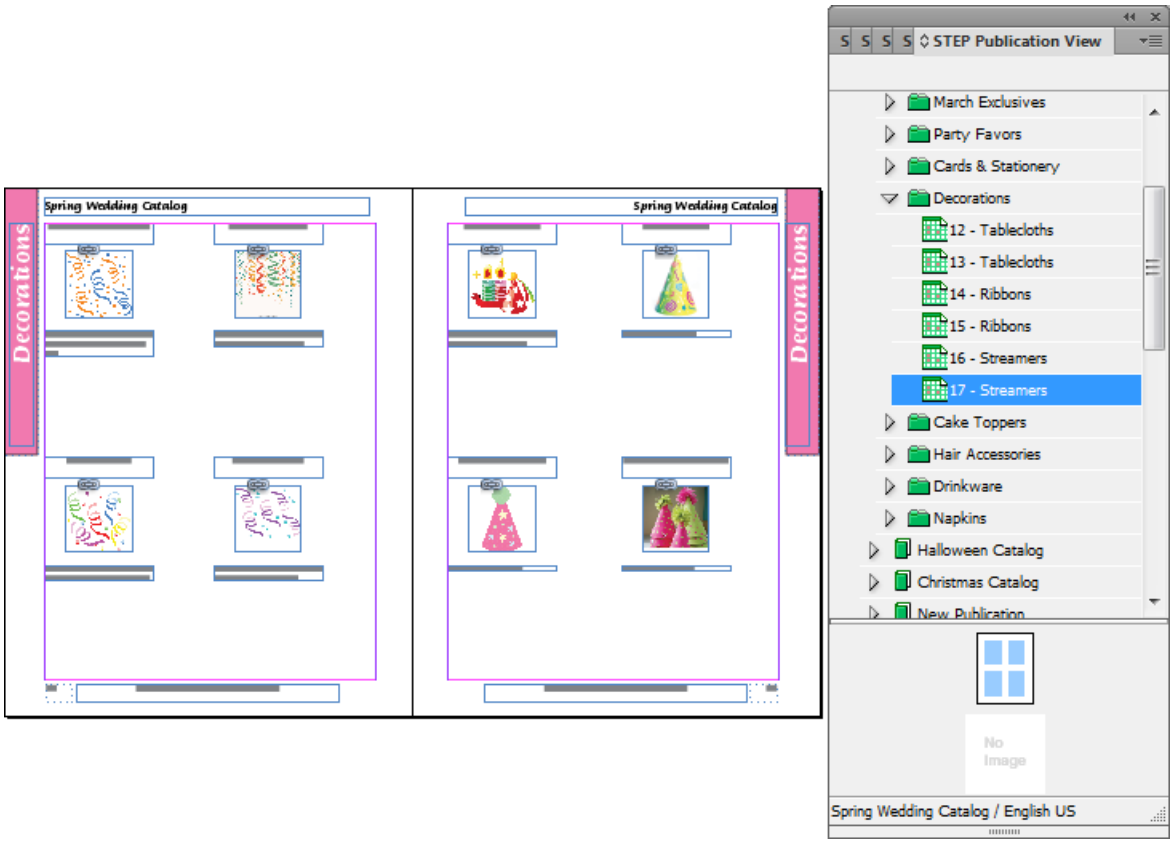
Use the **Publication Planner** to organize pages in the Flatplanner publication as well as monitor Flatplanner workflows. For more information, see the **Publication Planner** section of this guide.

Define Pagination Rules

To further automate the building of Flatplanner pages in STEP and InDesign, one or more **pagination rules** can be added at the publication or section level of a publication. Pagination rules perform actions such as setting a default object layout (product template) or assigning different publication template master spreads to different publication sections. See the **Flatplanner Pagination Rules** section of this guide for more information.

Build Planned Pages in InDesign

After planned pages are built in the STEP Workbench, they are ready to be mounted in InDesign. See the **Finalizing Pages In InDesign** section of this guide for more information.



Save Mounted Pages to STEP

See the **Saving Mounted Planned Pages to STEP** topic in this guide for more information.

Coordinate Between Teams to Assign Page Tasks

If using the **STEP Workflow** component in conjunction with Flatplanner, the publication can be built in a collaborative environment by using one or more Flatplanner workflows. A Flatplanner workflow can be used to send Flatplanner planned pages and actual InDesign pages to and from different teams, such as between product managers, merchandisers and graphic designers / DTP operators. For more information on Flatplanner workflows, see the **Flatplanner Workflows** section of this guide.

Generate InDesign Package for Finalized Pages

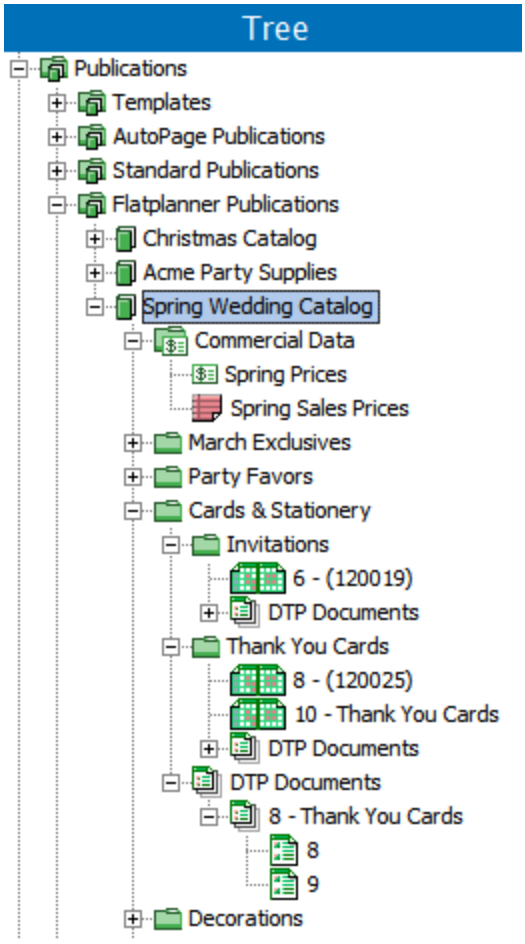
An InDesign package can be created from STEP and can help automate the process of gathering the required InDesign files, fonts, and images (links) that need to be sent to the printer in order to publish the publication. See the **Creating an InDesign Package in STEP** topic in the **STEP Publisher** documentation for more information.

Flatplanner User Interface in STEP

The **Flatplanner** component uses the publication hierarchy in the **Tree** and a selection of **tabs** in the STEP Workbench user interface. After the Flatplanner publication is created in the workbench, the publication is finalized in InDesign. For information on the Flatplanner features available in InDesign, see the **Finalizing Pages in InDesign** section of this guide.

Publication Hierarchy

The **publication hierarchy** in the Tree is the starting point for creating Flatplanner publications. All initial publication creation work is done in this structure, such as creating the publication, creating and designing the page templates, and assigning templates to the publication. For more information on the objects that compose the publication hierarchy, see the **Publication Hierarchy** section of the **STEP Publisher** documentation.



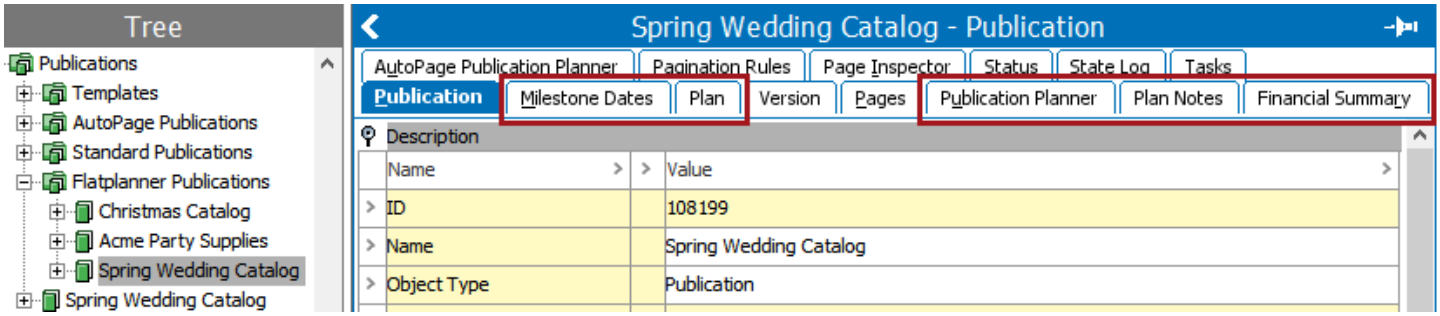
Workbench Tabs

The following tabs in the STEP Workbench are used exclusively by the Flatplanner component:

- Plan
- Publication Planner
- Plan Notes
- Financial Summary
- Milestone Dates *(only valid if using a Flatplanner workflow)*

These tabs display in the STEP Workbench when a publication, section, or planned page / spread is selected in the publication hierarchy. The Milestone Dates tab is also available at the publication group level.

Note: The Publication Planner, Financial Summary, and Milestone Dates tabs are not available when viewing plans at the **planned page** level.



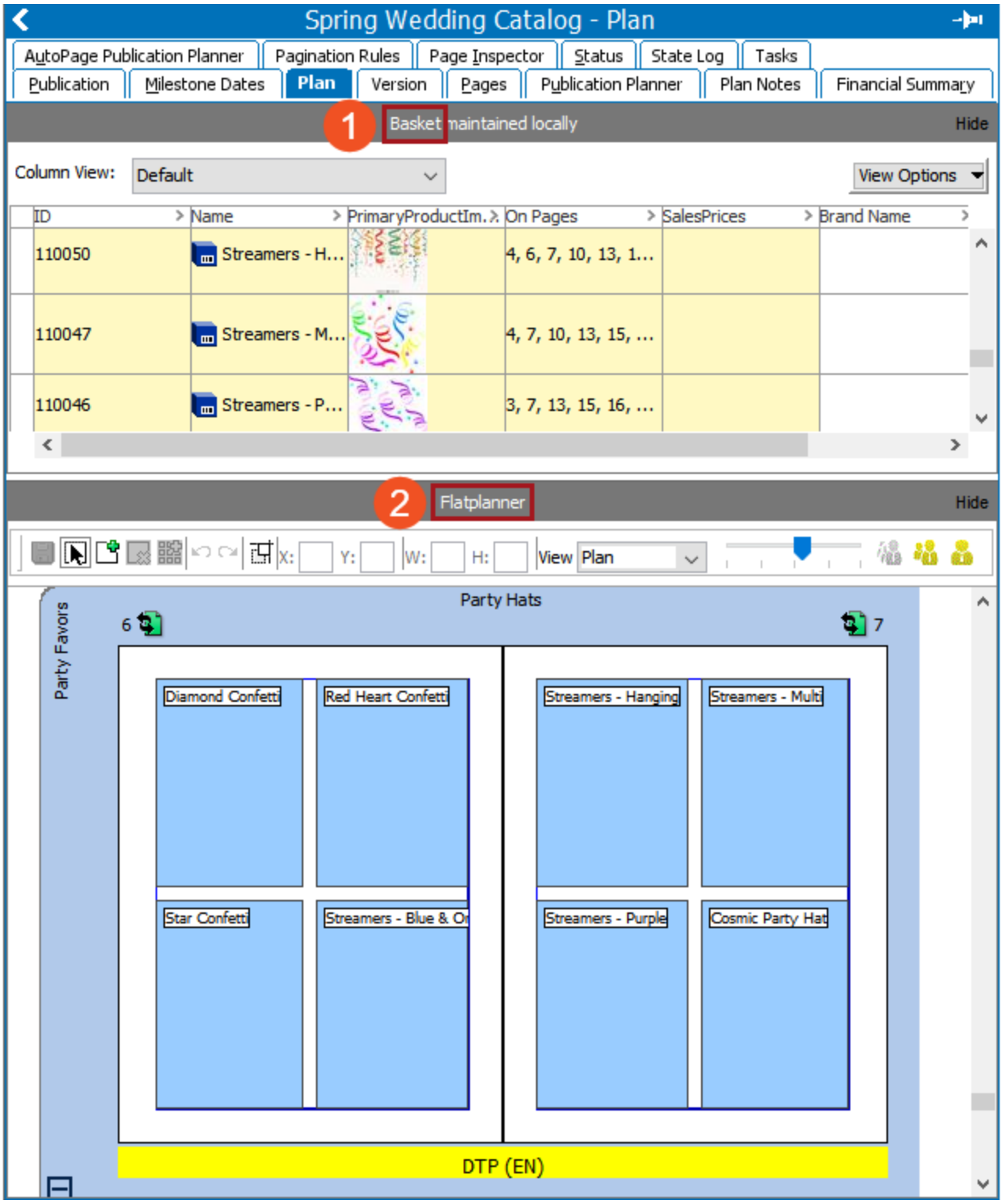
The following tabs are also used by Flatplanner, though they can be used for all types of publications:

- Publication
- Version
- Pages
- Pagination Rules

Plan tab

The **Plan** tab is where Flatplanner baskets are maintained and where pages are created. The below screenshot shows the two primary work areas on the Plan tab: the Basket and the Flatplanner pane.

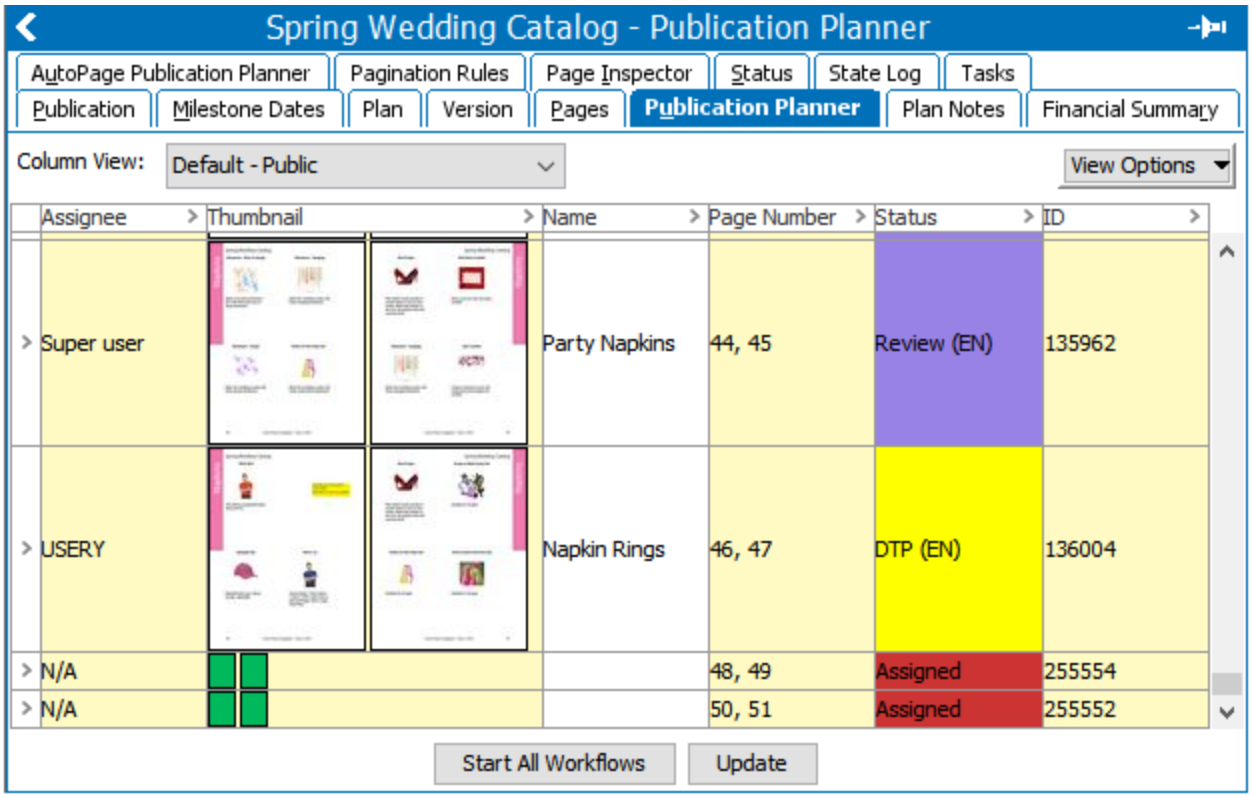
1. **Basket**: The basket serves as a container in which to store the objects (typically products and assets) that will be placed onto frames on Flatplanner planned pages. For more information on baskets, see the **Flatplanner Baskets** section of this guide.
2. **Flatplanner:** The Flatplanner pane is a visual-oriented page planning tool that displays the planned page spreads from which pages are built. The bulk of the work in Flatplanner is performed in this area. The frame layouts on the pages are generated by page templates. For more information on the Flatplanner pane, see the see the **Working with Frames on Flatplanner Pages** section of this guide.


Spring Wedding Catalog - Plan
AutoPage Publication Planner
Pagination Rules
Page Inspector
Status
State Log
Tasks
Publication
Milestone Dates
Plan
Version
Pages
Publication Planner
Plan Notes
Financial Summary
1
Basket maintained locally
Hide
Column View:
Default
View Options
ID
Name
PrimaryProductIm...
On Pages
SalesPrices
Brand Name
110050
Streamers - H...
4, 6, 7, 10, 13, 1...
110047
Streamers - M...
4, 7, 10, 13, 15, ...
110046
Streamers - P...
3, 7, 13, 15, 16, ...
2
Flatplanner
Hide
X:
Y:
W:
H:
View
Plan
Party Hats
Party Favors
6
7
Diamond Confetti
Red Heart Confetti
Streamers - Hanging
Streamers - Multi
Star Confetti
Streamers - Blue & Or
Streamers - Purple
Cosmic Party Hat
DTP (EN)

Publication Planner tab

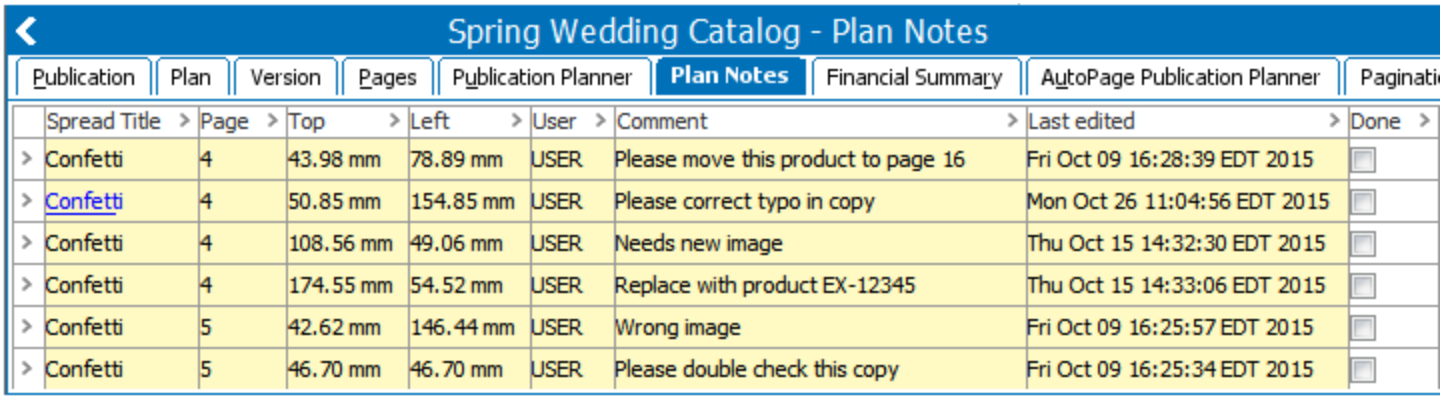
The **Publication Planner** is where pages within publications are organized, added, removed, or rearranged. Flatplanner workflows can also be monitored in the Publication Planner, along with the workflow status of each page or spread.

For more information, see the **Publication Planner** section of this guide. For more information on Flatplanner workflows, see the **Flatplanner Workflows** section of this guide.



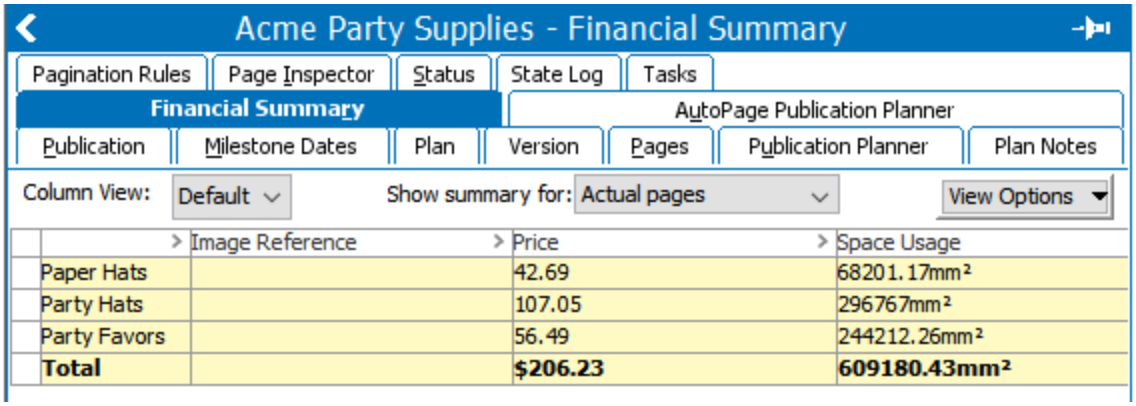
Plan Notes tab

The Plan Notes tab enables the viewing, editing, and deletion of all planned page notes in one location. For more information on the Plan Notes tab, see the **Adding Notes and Free Text** section of this guide.



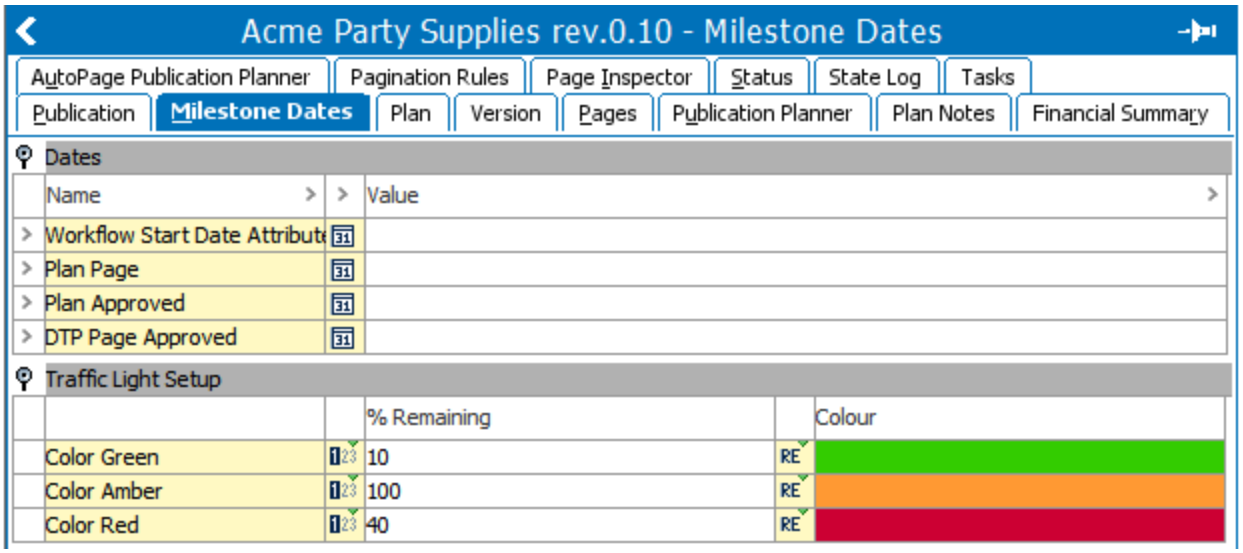
Financial Summary tab

The Financial Summary tab determines what data will be included in a Financial Report pulled from a publication or section, including space usage of mounted objects. For more information on the Financial Summary tab, see the **Financial Summary and Financial Reports** section of this guide.



Milestone Dates tab

The Milestone Dates tab displays information related to Flatplanner workflows that goes beyond what is visible on the Publication Planner tab. For more information on the Milestone Dates tab, see the **Publication Milestones** section of this guide.



Views

Configurable **views** appear in the following areas of the Flatplanner interface in the STEP Workbench:

- Basket view
- Financial Summary view
- Sticker Book view
- Plan Notes tab *(limited to sorting and filtering only)*
- Publication Planner

> **Note:** The Publication Planner has its own unique set of view elements. As such, the only instructions in this documentation section that are applicable to the Publication Planner are for maintaining, sorting, and filtering views—not editing the options within the views. For more information, see the **Publication Planner** section of this guide.

All views display in a tabular, column-based format except for those in the Sticker Book view. A number of configuration options are available for each view, allowing them to be tailored for more efficient or personalized use. Elements can be added to each view to display additional information about each object linked to the Flatplanner page, such as ID, Name, attribute values, image thumbnails, and space usage on InDesign pages. View elements can also be sorted and filtered when displayed in columns.

New views can be created and existing views can be copied, renamed, or deleted. Views can be made public, available to all users, or private, only available to individual users. By default, there is always one view available when Flatplanner is first installed. This view serves as the starting point for creating new views.

This documentation section covers the following topics:

- Editing Views
- View Elements
- Sorting and Filtering Views
- Copying, Creating, and Deleting Views
- Public and Private View Options

Detailed information about the various areas of the Flatplanner interface discussed in this documentation section can be found in subsequent sections of this guide.

Editing Views

This topic explains how to edit **View Options** in the following areas of the Flatplanner interface in the STEP Workbench:

- Basket view
- Sticker Book view
- Publication Planner
- Financial Summary view

The following sections of this topic explain the initial steps for editing a view, how to add new elements to a view, how to edit existing view elements, how to remove elements from a view, and how to change the sequence in which elements display in a view.

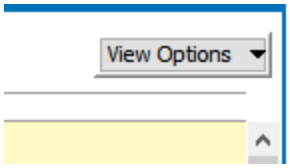
Note: Users may not create, edit, or delete public views of the basket, financial summary, publication planner, or sticker book unless they have the privileges to do so. See the **Public and Private View Options** topic in this guide for more information.

Edit Views Using View Options

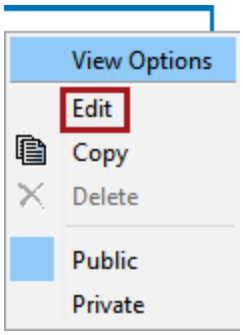
Follow these steps to add, edit, remove, and resequence the elements in a view using the View Options dropdown.

Edit the View

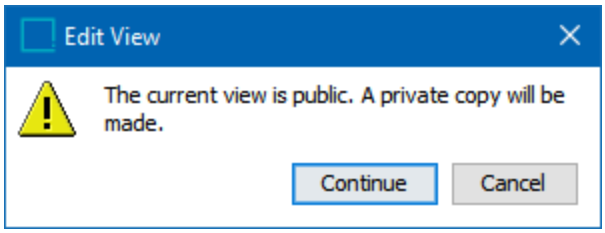
1. In the **Tree**, select either a publication**,** a section, or planned page.
2. In the upper right-corner of the interface, click the **View Options** button.



3. In the menu that displays, click **Edit**.

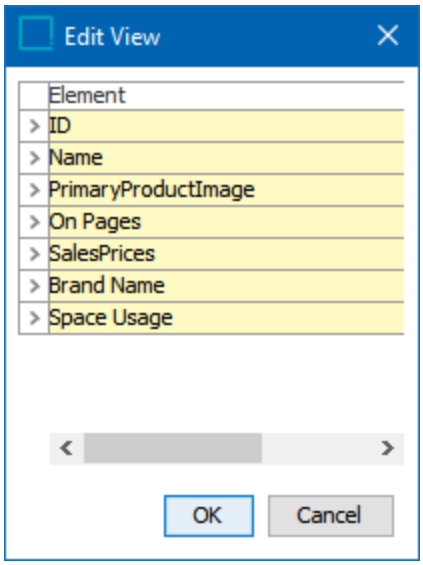


4. If the current view is Public, an 'Edit View' warning dialog will display that says 'The current view is public. A private copy will be made.' Click **Continue** to create a private copy of the view and proceed with editing.



> **Note:** This newly created view will only be visible to the user currently making the edits. To make this view available to all users, it must be made Public. For more information on how to maintain Public and Private views, see the **Public and Private View Options** section of this guide.

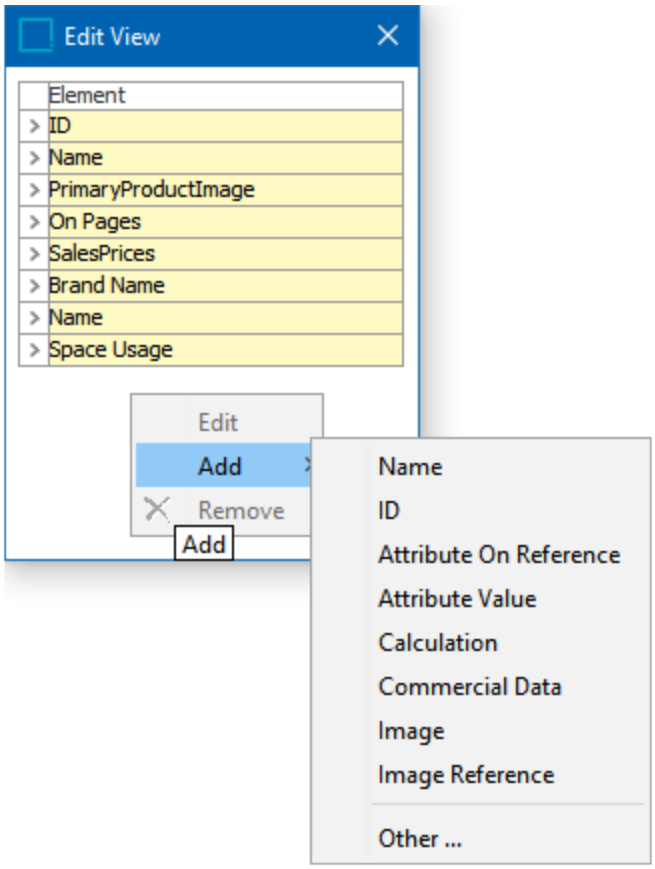
5. The **Edit View** dialog displays, showing a list of the current view content elements. This list will be different depending on how the view was last configured before being edited.



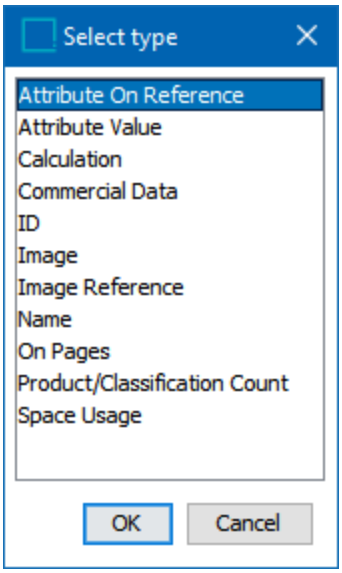
Add New View Elements

To add new elements to a view:

1. Either right-click an existing element or right-click in the white space below the existing elements, then select **Add** to display a list of the eight most recently used elements.



- To view the full list of content element options, click **Other …** to display the **Select type** dialog.



2. Select the element that you want to add by either selecting it from the **Add** dropdown list or the **Select type** dialog.

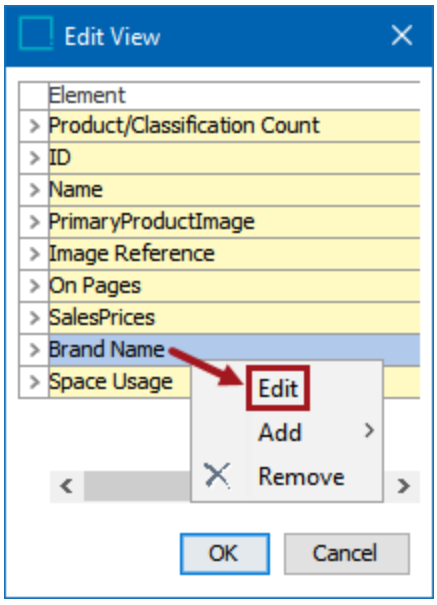
Some content elements are added immediately and require no further action. However, some elements need additional configuration. For detailed information on each element, see the **View Elements** topic in this guide.

Edit Existing View Elements

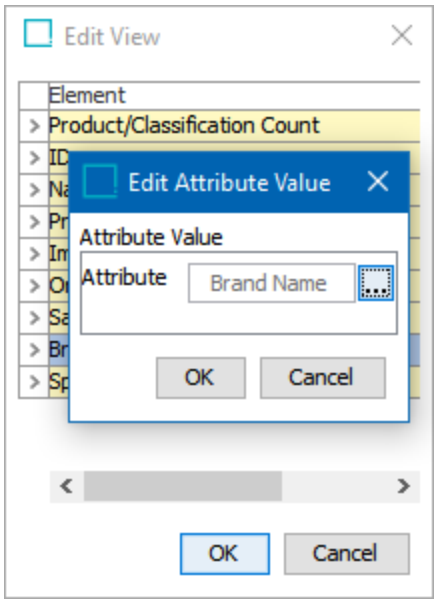
Existing elements in a view can be edited if they required configurations when being added originally (e.g., if an attribute had to be specified, for 'Attribute Value'). Elements such as ID, Name, On Pages, and Space Usage cannot be added.

To edit an existing element in a view:

1. In the **Edit View** dialog, select the row containing the desired element, then right-click and select **Edit**. In this example, an existing attribute entry called Brand Name will be edited.



2. Depending on the element type selected, an 'Edit' dialog will display that behaves identically to the corresponding 'Add' dialog that displayed when the element was originally added. In this example, the edit dialog is 'Edit Attribute Value.'



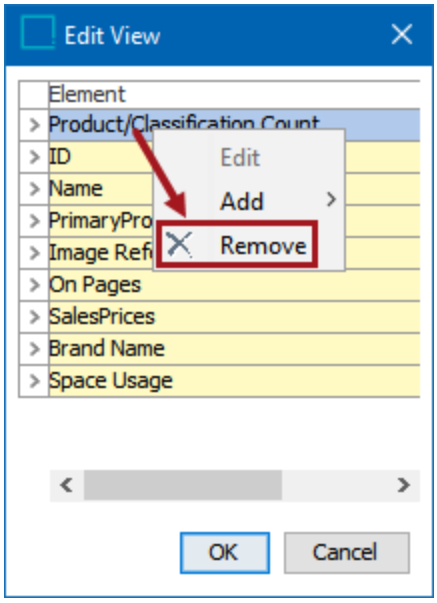
3. Follow the same steps outlined in the previous 'Add New View Elements' subsection to edit the element. E.g., in this example, click the ellipsis button (...) to select a new attribute.

4. Click **OK** to finish editing the element.

Remove View Elements

To remove an element from a view:

1. In the **Edit View** dialog, select the row containing the desired element, then right-click and select **Remove**.



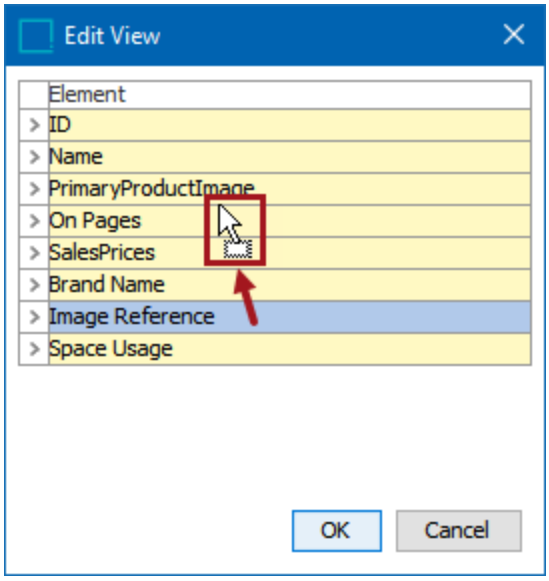
2. Click **OK** to remove the element.

Change the Sequence of View Elements

The order that the elements appear from top to bottom in the **Edit View** dialog is how they will display from left to right in the Basket and vertically in the Sticker Book view.

To resequence the elements in the Edit View dialog:

1. Left-click on the element to move to a different position, then hold down the mouse button and drag the element up or down to the desired location.
2. Release the mouse button when the element has been properly positioned.



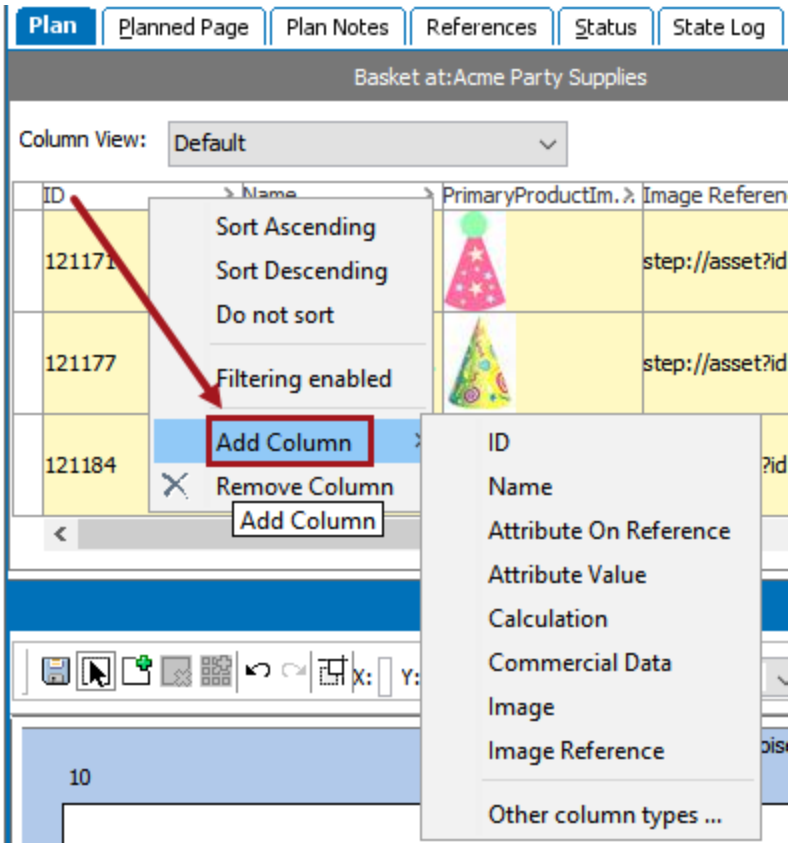
3. Click **OK** to save changes.

Edit Views by Column

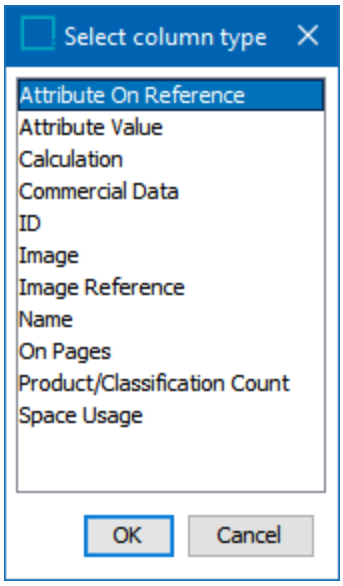
If using a view that contains columns (Basket, Publication Planner, Financial Summary, but not Sticker Book), a view can edited through right-click actions on the columns themselves. Columns cannot be resequenced this way; that can only be done by using View Options.

Add a Column to a View

1. Right-click on the header of the column that is adjacent to where you would like to add the new column, then select **Add Column**. (The new column will be added immediately to the right of the selected column.) A menu displays that lists the eight most recently used elements.



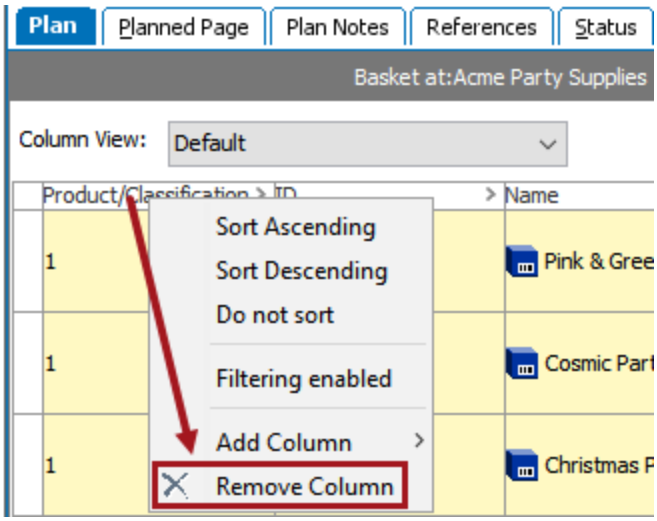
2. Select the relevant column from the list, or, to view the full list of column options, click **Other column types…** to display the **Select column type** dialog. The available options are identical to those listed in the **Select type** dialog outlined in the previous subsection.



3. If the column type requires no additional configurations, the column will be immediately added to the view. (If adding the column from the 'Select column type dialog,' the column will be added after clicking **OK**.)
4. If additional configurations are required, such as selecting which attribute to display for Attribute Value, then an additional dialog will display. For detailed information on each element, see the **Configurable View Options** topic in this guide.

Remove a Column from a View

1. Right-click on the header of the column that you would like to remove from the view, then select **Remove Column**.



2. The column is removed.

View Elements

A number of configuration options are available for each view, allowing them to be tailored for more efficient use. These content elements determine which columns display in each view, except for Sticker Book, where these elements display in a vertical list on each Flatplanner frame. The view elements described in this topic can be configured in the following areas of the Flatplanner interface in the STEP Workbench:

- Basket view
- Financial Summary view
- Sticker Book view

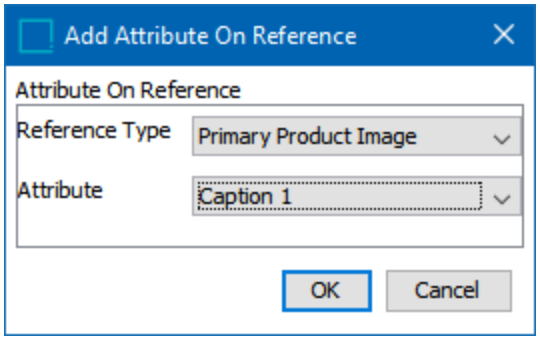
Note: The Publication Planner also uses a view, but it has a different set of view elements. For more information on the view options available for the Publication Planner, see the **Configuring the Publication Planner Column View** topic in this guide.

The following subsections describe the available View element options.

Attribute On Reference

Displays the value of a description attribute that is valid on the specified reference link type. For example, this element could be used to display a caption for an image that is linked to a product in a basket. The caption attribute would exist on the link between the product and the image.

- From the **Reference Type** list, select the preferred reference type.
- From the **Attribute** list, select the attribute whose value should be displayed.
- Click **OK** to add the element to the view.

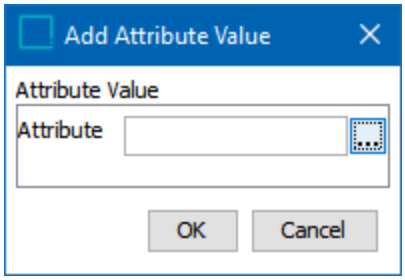


Attribute Value

Displays the value of a specified attribute or attributes.

- Click the ellipsis button (...), then browse to or search for the preferred attribute in the 'Select Object' dialog (not pictured). Multiple attributes can be selected by holding the Ctrl or Shift key while making selections.

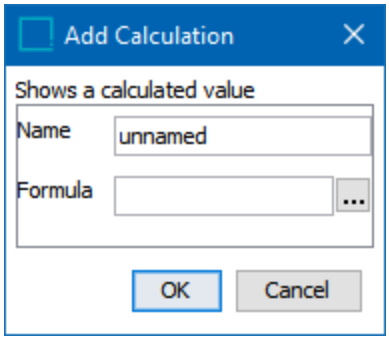
- After selecting the attribute(s), click **Select** to close the 'Select Object' dialog.
- Click **OK** to add the element to the view.



Calculation

Displays the value of a specified STEP Function. One example could be a calculation that concatenates the values of multiple commercial terms lists along with free text descriptors. For example, text such as 'Qty. on hand' or 'Qty. on order' could be concatenated along with corresponding commercial terms values.

- In the **Name** field, enter a name for the calculation.
- Click the ellipsis button (...) next to the **Formula** field to launch the Function Editor (not pictured).
- Enter the preferred formula, then click **OK** to close the Function Editor.
- Click **OK** to add the element to the view.

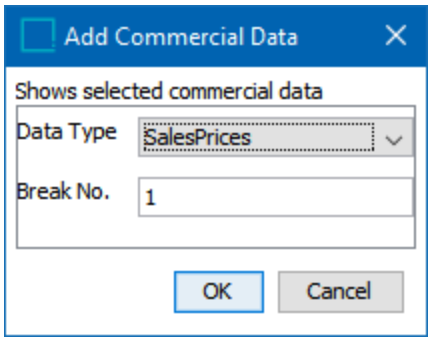


For detailed information about calculations and how to specify functions, see the **STEP Functions** section of the **Resource Materials** online help documentation.

Commercial Data

Displays the specified value from a commercial terms list type.

- In the **Data Type** list, select the preferred commercial data list type.
- In the **Break No.** field, enter the break number of the commercial term value that should be displayed.
- Click **OK** to add the element to the view.



Multiple term values from the same list type, e.g., price breaks that correlate to different quantities, can be added to the view by adding the same list type again, then adding a different break number.

For detailed information on commercial data, see the **Commercial Data** section of the **STEP Publisher (InDesign)** documentation.

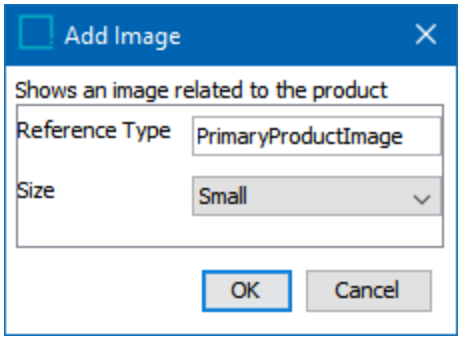
ID

Displays the object's STEP **ID** in the view.

Image

Displays a thumbnail of a linked image.

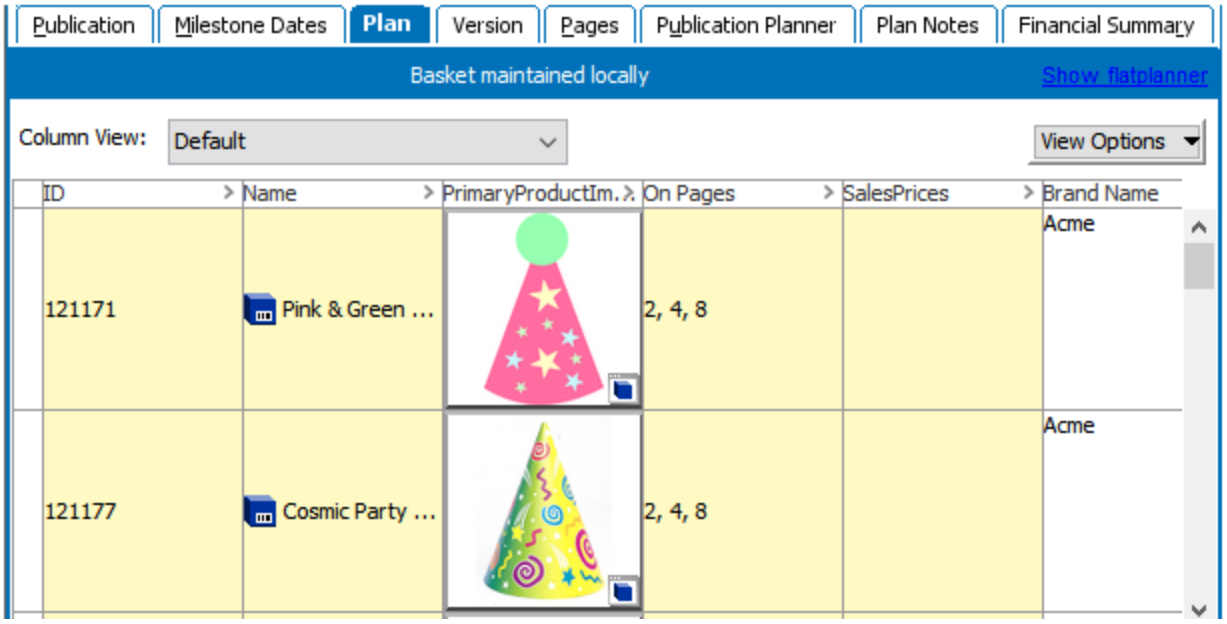
- In the **Reference Type** field, type the *ID* of the asset reference type whose linked image should be displayed.
- From the **Size** list, select the preferred image thumbnail size. The available options are **Small** and **Normal**.

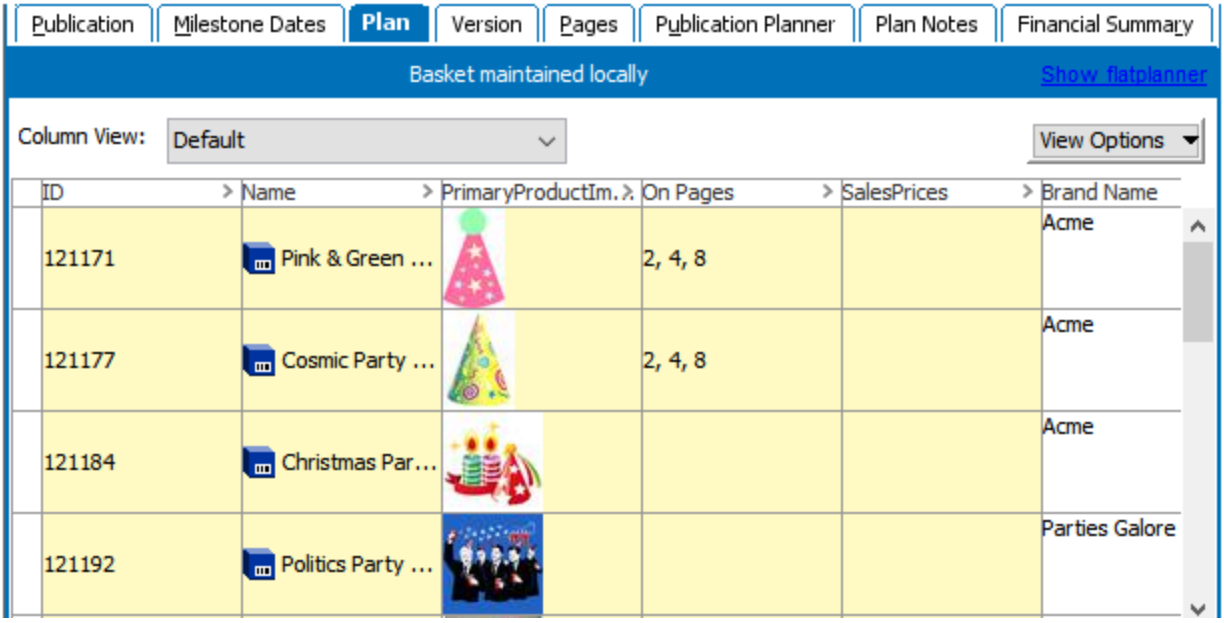


- Click **OK** to add the element to the view.

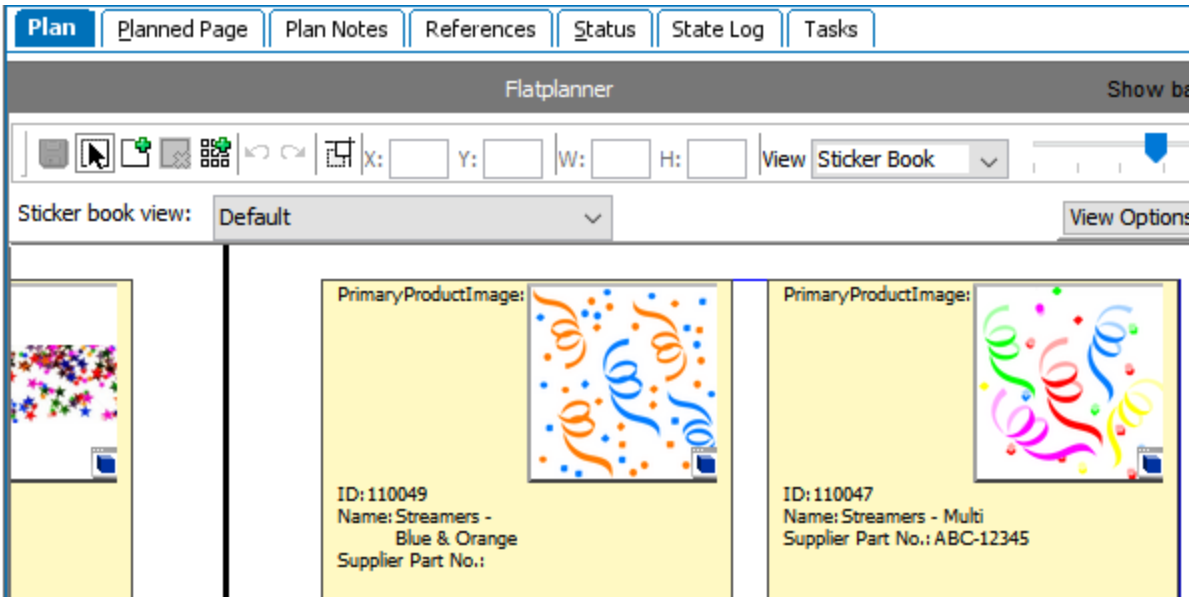
Image Size Examples

In the Flatplanner **Basket,** Normal and Small images display as follows:





In the Flatplanner **Sticker Book** view, Normal and Small images display as follows:



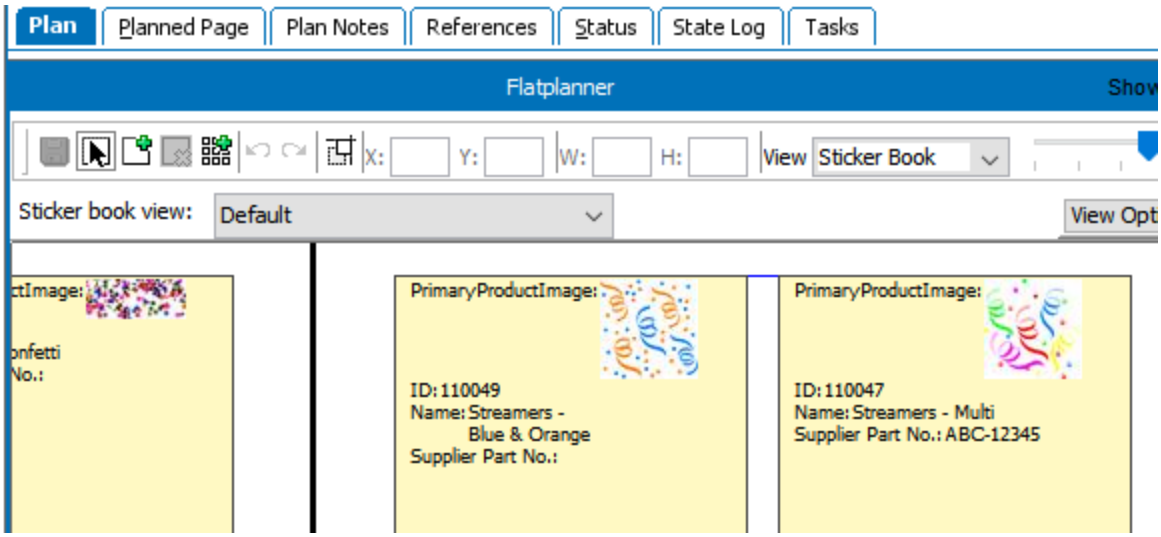
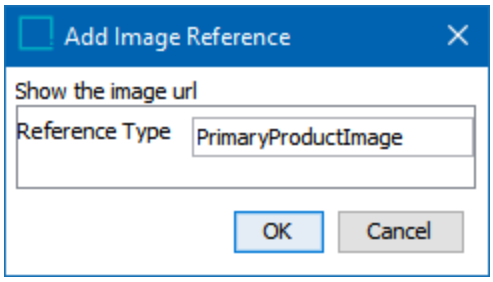


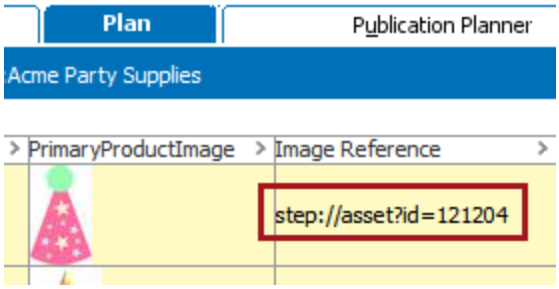
Image Reference

Displays the STEP URL of a linked asset. Typically, the asset reference type entered for this element will be the same as the one used for the **Image** element.

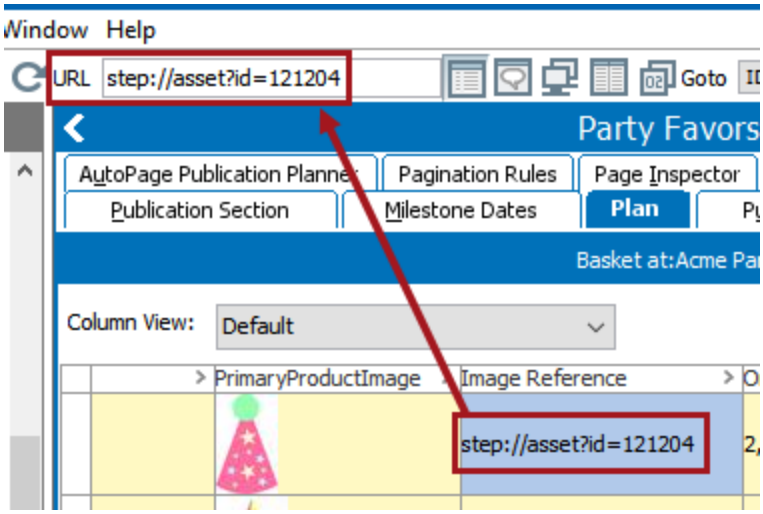
- In the **Reference Type** field, type the *ID* of the asset reference type whose linked image should have its URL displayed.



- Click **OK** to add the element to the view.
- The STEP URL of the linked image will display in the view. The below screenshot shows how the URL displays in a basket.



Tip: Though the URL is not hyperlinked in the view, the URL can be copied to the clipboard by selecting the cell in the basket and pressing Ctrl+C (Cmd+C on Mac systems). The URL can then be pasted into the STEP URL field by pressing Ctrl+V (Cmd+V on Mac systems).



Name

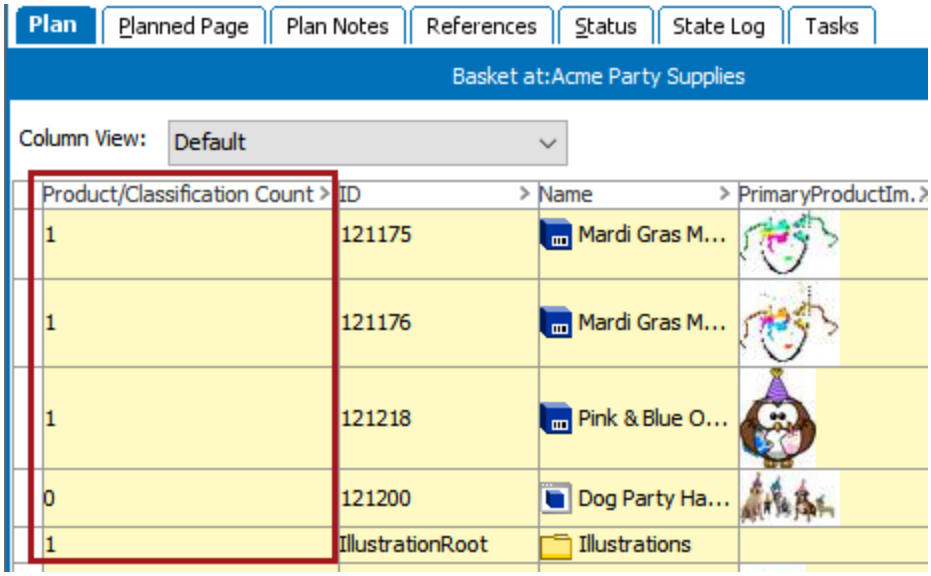
Displays the object's STEP **Name** in the view.

On Pages

Displays the page number(s) of the Flatplanner planned page(s) to which the object has been linked in the publication.

Product/Classification Count

Displays the number of products or classifications in a view column. The number displayed is 1 for product and classification objects and 0 for asset objects.



Space Usage

Displays the amount of space, in square millimeters, that the object occupies on **actual** pages (InDesign documents) saved back to the publication in STEP.

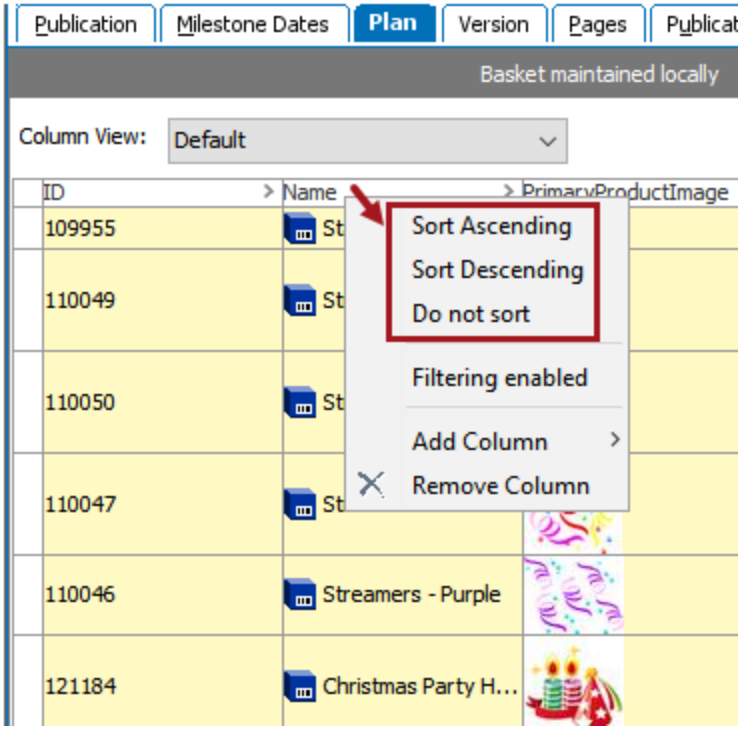
Sorting and Filtering Views

Elements in a view can be **sorted** and **filtered** in all areas of the Flatplanner interface where customizable views are available in a column-based format (i.e., all views except for Sticker Book):

- Baskets
- Financial Summary
- Plan Notes
- Publication Planner

Sorting Options

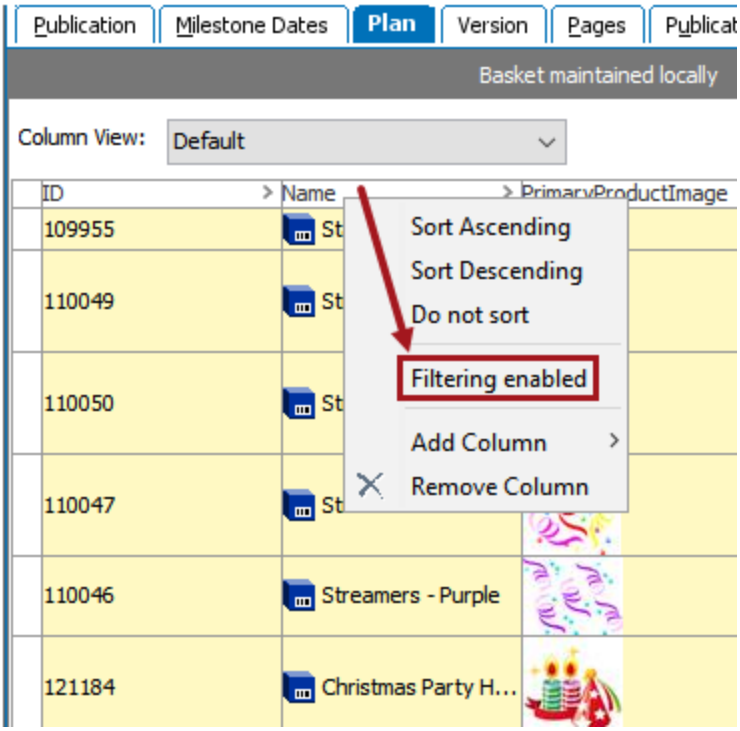
By using the sort options, data in column-based views can be arranged in ascending or descending order. The following screenshot shows a basket view, but the instructions apply to all column-based views.



1. Right-click the column header on which you want to sort the view, and then choose the preferred sort order.
   - **Sort Ascending** sorts the data numerically from the smallest to largest number and alphabetically from A to Z.
   - **Sort Descending** sorts the data numerically from the largest number to the smallest number and alphabetically from Z to A.
   - **Do not sort** removes any previously applied sorting.

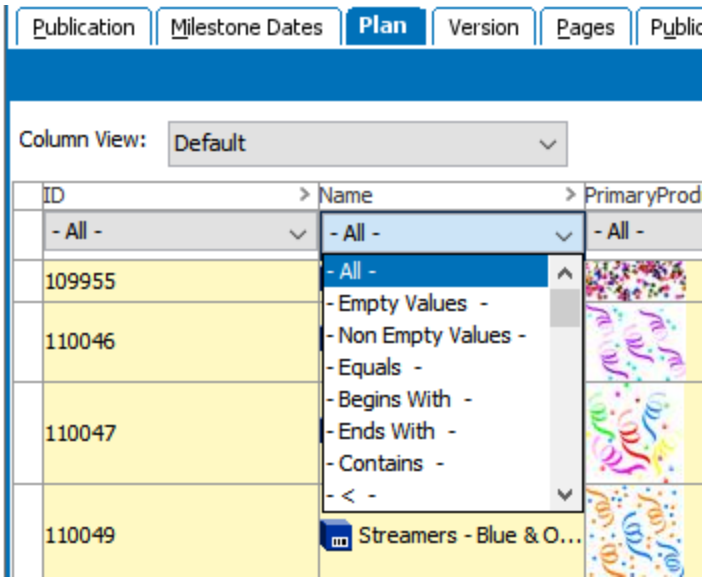
Filtering Views

Filters allow you to view a subset of data. Instead of viewing all data in a view, you can choose which data you want to see at any given time. The following screenshot shows a basket view, but the instructions apply to all column-based views.



Adding the Filtering Row

1. Right-click on any column header, then choose **Filtering enabled**. A row with filtering options is added. By default, **-All-** is displayed for all columns. \
2. In the column that you want to filter, click the -All- dropdown list, then choose the preferred filtering option.



Available Filtering Options

The following filtering options are available:

Filter Options	Description
All	Displays all data
Empty Values	Displays only fields with empty values
Non Empty Values	Displays only fields with values
Equals	Displays only values that match the text string specified
Begins with	Displays only values that begin with the text string specified
Ends with	Displays only values that end with the text string specified
Contains	Displays only values that contain the text string specified
< (less than)	Displays only values that are less than the number specified
> (greater than)	Displays only values that are greater than the number specified

Copying, Creating, and Deleting Views

In some cases, the default views included in the Flatplanner interface may not suit the needs of all users. In this instance, new views can be created, and/or users can copy an existing view to make their own private view. Copied views can be made available to all users (public) or only available to the user who makes the copy (private). If a view is no longer needed, it can be deleted.

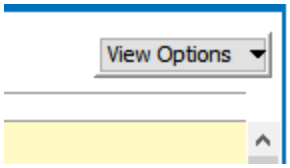
The instructions in this topic apply to the following areas of the Flatplanner interface where views can be configured:

- Basket view
- Sticker Book view
- Financial Summary view
- Publication Planner

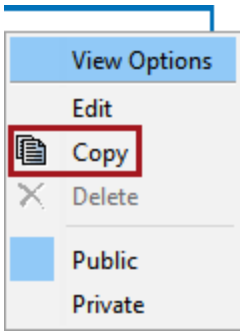
Note: Users may not create, edit, or delete public views of the basket, financial summary, publication planner, or sticker book unless they have the privileges to do so. See the **Public and Private View Options** topic in this guide for more information.

Copy a View

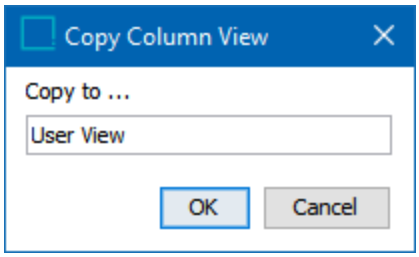
1. In the upper right corner of the interface, click the **View Options** button.



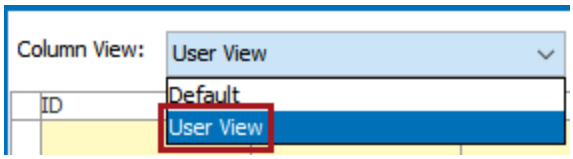
2. In the menu that displays, click **Copy** to display the **Copy Column View** dialog.



3. In the **Copy to …** field, type the name of the new view, then click **OK**.



4. The copy of the view is now available in the **Column View** dropdown list.



Create a View

To create a new view, you can either **edit** or **copy** an existing view by clicking on the View Options button. Both methods automatically create a new view.

Note: A new view is not created if the view is edited by adding or removing *columns*.

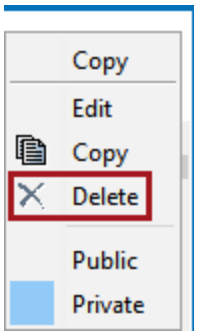
- To create a new view by **editing** an existing one, follow the instructions provided in the **Editing Views** section of this guide.
- To create a new view by **copying** an existing one, follow the instructions provided in the 'Copy a View' section above.
- If editing a public view, a private view is automatically created when you start editing. After editing, you can make it public again to keep all changes. This prevents the view from having to be copied and re-saved.

Delete a View

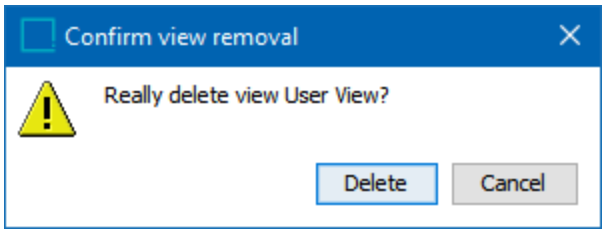
1. In the **Column View** dropdown list, select the View that you want to delete.

   Note: If only one view is available, it cannot be deleted.

2. In the upper right corner of the interface, click the **View Options** button, then select **Delete**.



3. A 'Confirm view removal' dialog displays. Click **Delete** to delete the view, or **Cancel** to keep the view.



Rename a View

There is no direct method for renaming a view. To 'rename' a view, you must first copy an existing view, provide a new name for the copied view, then delete the original view.

Public and Private View Options

Views can be public or private. Public views are available to all users. Private views are only available to the user who created them.

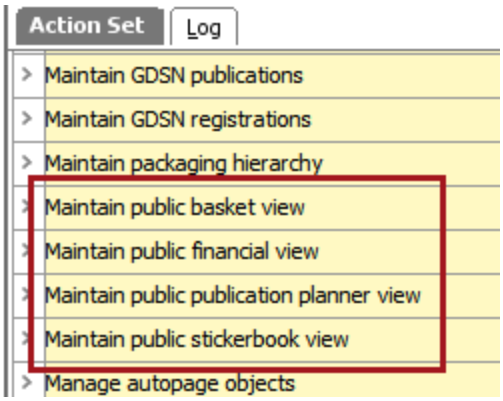
Make the Current View Public

1. On the plan tab, select **Sticker Book** from the **View** list, click **Show basket**, or click the **Financial Summary** tab.
2. In the upper right corner, click **View Options**, then choose **Public** or **Private**.
   - When you select **Public**, all users can select the view from the view list in the upper left corner. A Public view has '- Public' appended to its name.
   - When you select **Private**, the view is only available to you from the view list in the upper left corner.

Restrict Users From Maintaining Public Views

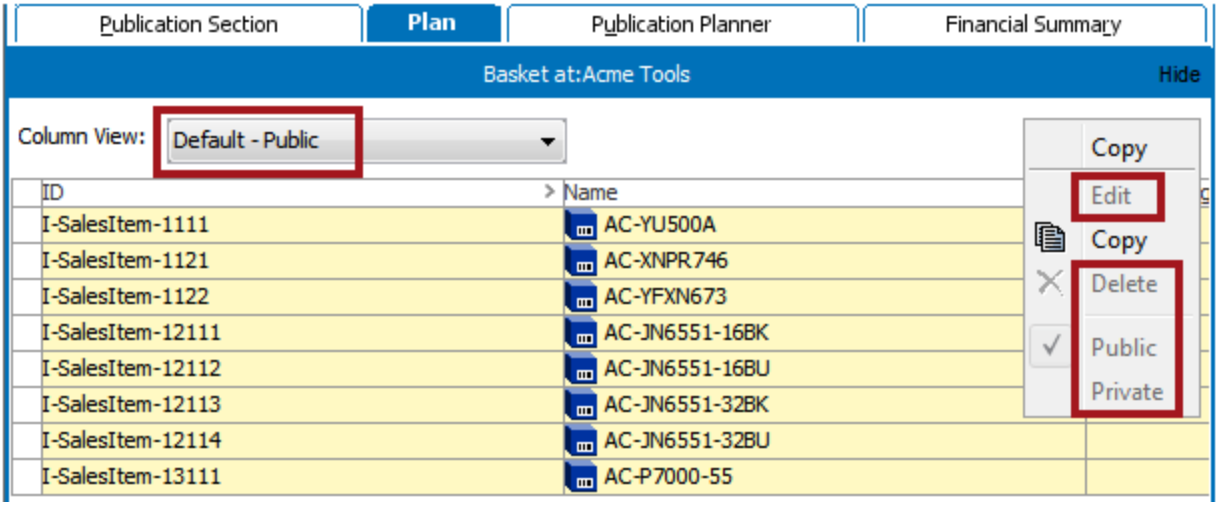
Users may not create, edit, or delete public views of the basket, financial summary, publication planner, or sticker book unless they have the privileges to do so. The following four user actions enable these privileges:

- Maintain public basket view
- Maintain public financial view
- Maintain public publication planner view
- Maintain public stickerbook view



Users who are not granted these privileges will have the option to maintain individual private views only, thereby blocking the possibility of a user saving a private view over a public view. Non-privileged (restricted) users may copy a public view and configure this copy to their individual preferences, but this copied view will be Private and only visible to the user who created it.

In a **Public** view, the following 'view options' commands are disabled for restricted users: Edit, Delete, Public, and Private.



In a **Private** view, Edit and Delete are enabled, but Public and Private remain disabled.

See the **Privilege Rules** section of the **System Setup** / **Super User** documentationfor more information on the setup and configuration of user privileges.

Flatplanner Page Templates

To plan and design a catalog in Flatplanner, the following template types are used:

- Publication templates
- Product templates
- Page templates

This topic explains **page templates**, which are unique to Flatplanner and are the only type of template that can be created from within the STEP Workbench. For more information on publication templates and product templates, see the **Publication Templates** and **Product Templates** sections of the **STEP Publisher** documentation.

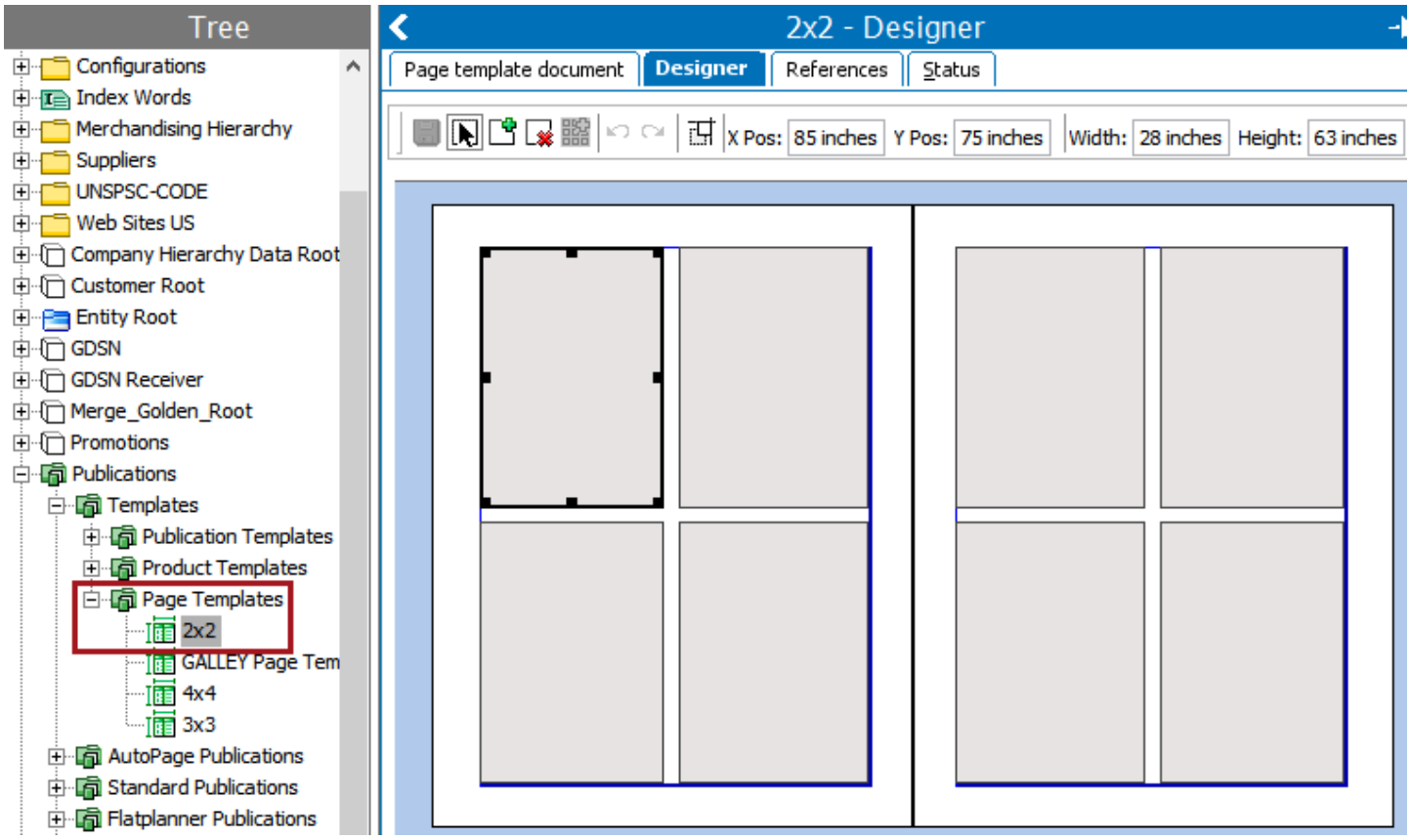
About Page Templates

Page templates drive the layout of flatplanner pages through the use of **frames**, which are typically arranged in a grid format. These frames determine where product presentations, assets, and free text elements will appear on the page. By linking **product templates** to these frames, individual products (or product assortments) can be placed into designated locations, with their layouts predetermined by the product template.

Since page template frames must fit within the page boundaries (page size and margins) specified by the **publication template**, the publication template must be created before page templates can be created.

A high-level summary of how page templates interact with product and publication templates for page layouts is as follows:

- **Publication templates** define the sizes and margins of *all pages* in the publication
- **Page templates** define the gridded layouts of *individual pages* through the use of *frames*
- **Product templates** define the layout that appears within each *frame* on the page



Standard Page Templates

The most common types of page templates used with Flatplanner are those created in the STEP Workbench. See the next section of this topic, **Creating Page Templates**, for information on how to build page templates in STEP. Page templates can also be created from within InDesign, but this is less common. For more information, see the **Creating Page Templates in InDesign** topic in this guide.

Galley Page Templates

Another type of page template used with Flatplanner is the Galley style of page template. Galley page templates **must** be created from within InDesign. For more information, see the **Galley Templates** section of this guide.

Creating Page Templates

Page templates are created in the STEP Workbench by using the **Create Page Template** wizard. This topic explains each step of the wizard, which allows you to easily configure the template with the dimensions and measurements you prefer. To create a page template in InDesign (which is less common, but required for Galley formats), see the **Creating Page Templates in InDesign** section of this guide.

Prerequisites

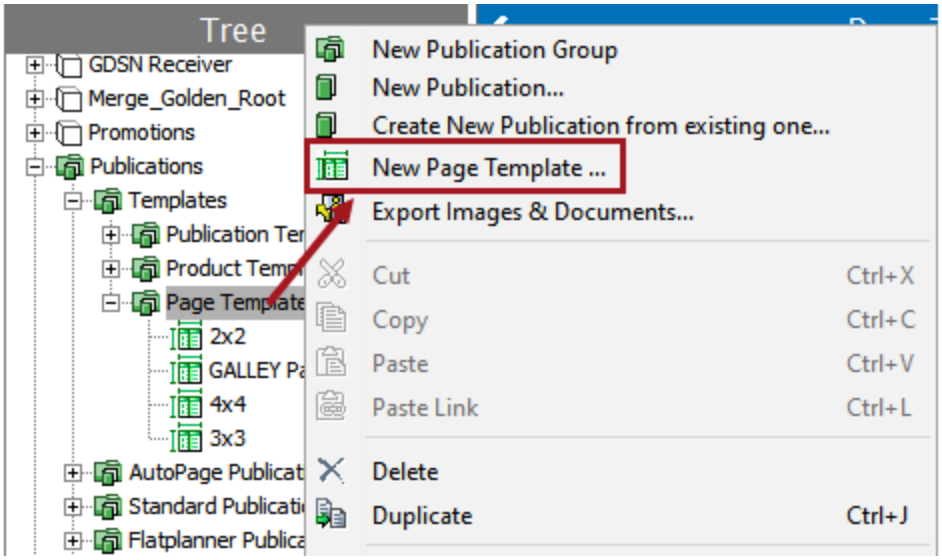
This topic assumes the following:

- You have already created a publication group in the publication hierarchy
- You have already created a publication template and saved it back to STEP

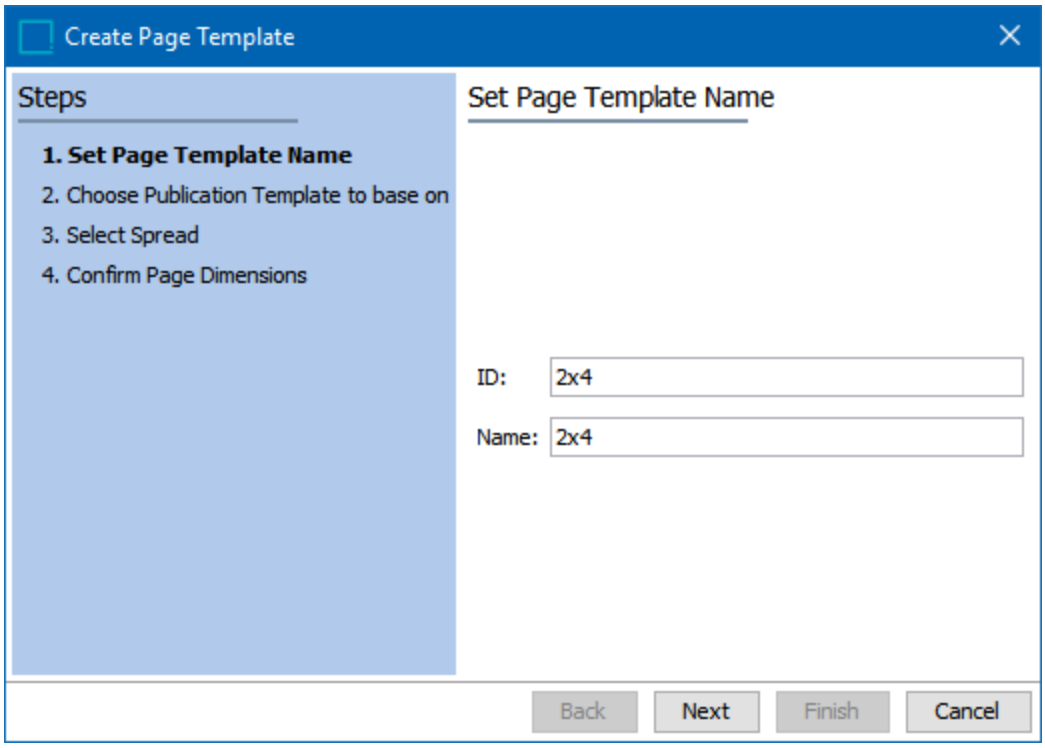
Creating the Page Template

Follow these steps to create a page template.

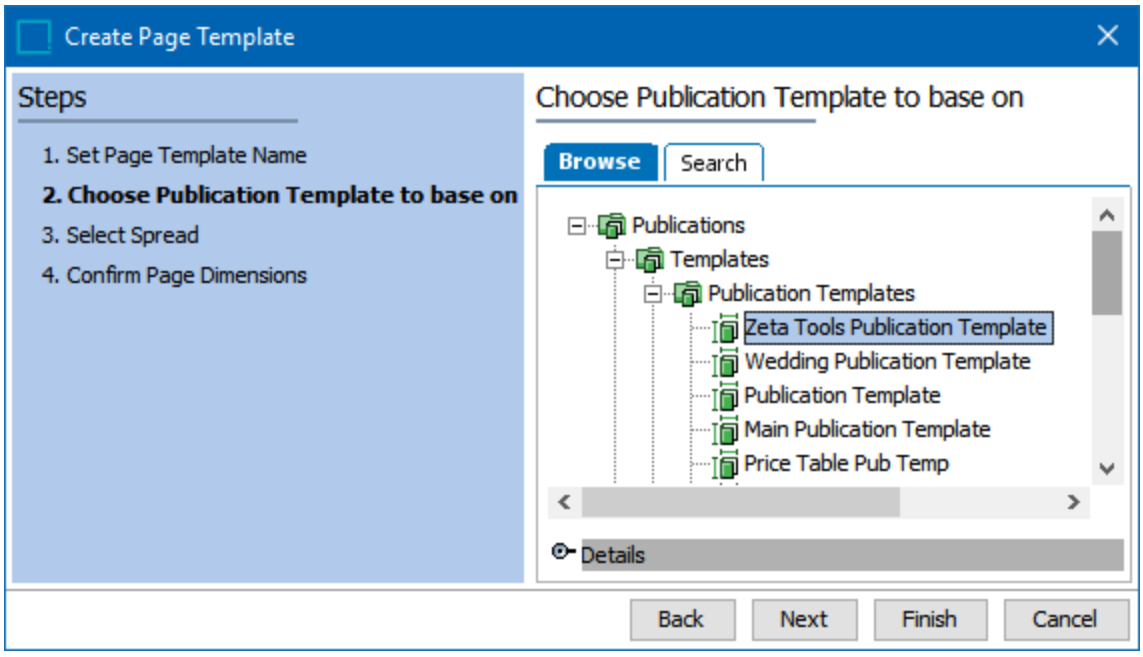
1. Select the **publication group** in the Tree in which you want to store your page template.
2. Right-click on the publication group and select **New Page Template**. The **Create Page Template** wizard displays.



3. In the **Set Page Template Name** step, type an ID and Name for the template, then click **Next**.



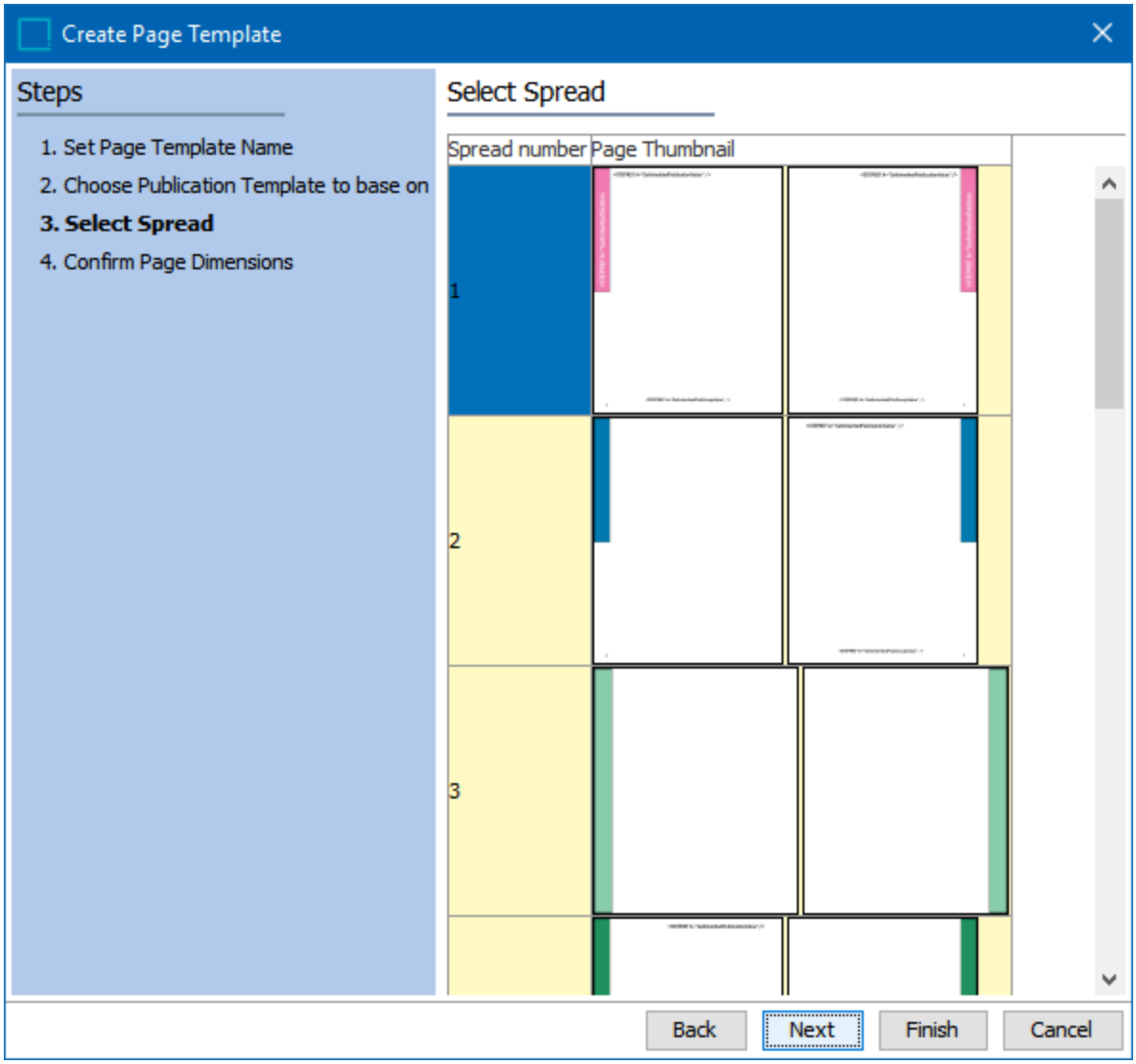
4. In the **Choose Publication Template to base on** step, browse to or search for the publication template that the template should be based on. Select the publication template, then click **Next**. Click **Finish** to save the template as-is and edit it later.



5. In the **Select Spread** step, choose the spread in the publication template from which you want to inherit the page size and margins. A thumbnail of each available spreads is displayed. Click **Next** after making your selection.

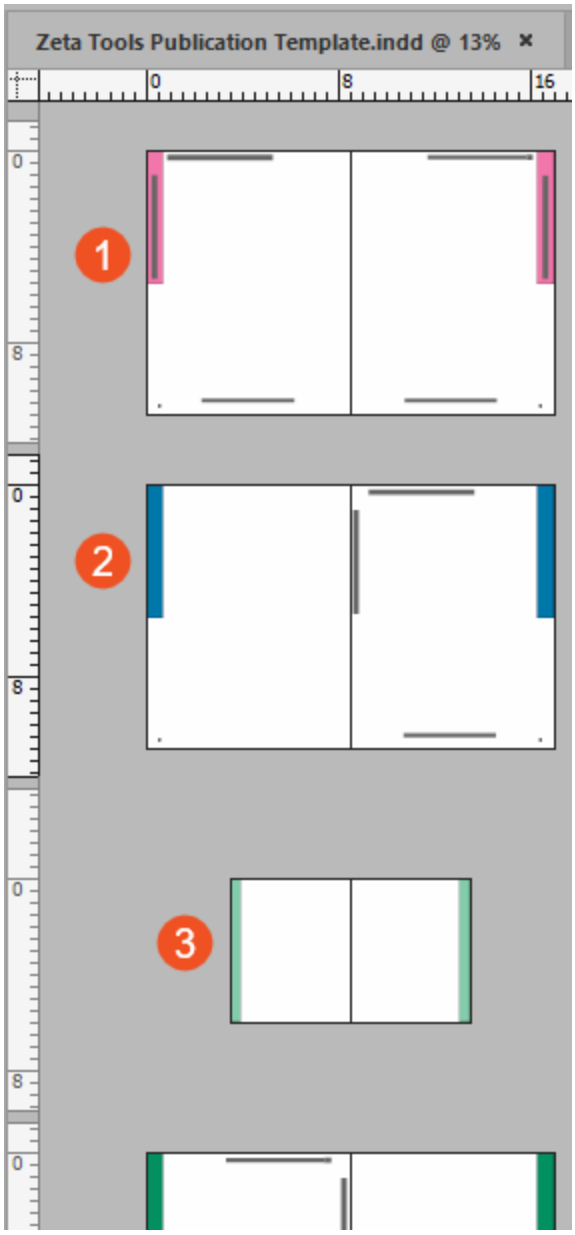
   One reason to select a specific publication page spread would be if pages of different *sizes* are used within the publication. For example, a retail mail order catalog may include an order form in the middle of the catalog, which is smaller than the normal pages of the catalog. Since only one publication template can be used per publication—but numerous page templates are typically required—the ability to choose from different spreads within the same publication template provides greater flexibility in publication building.

   The following screenshot shows how the publication spreads look in the **wizard**. Note that spread **3** is a different size than the other spreads.



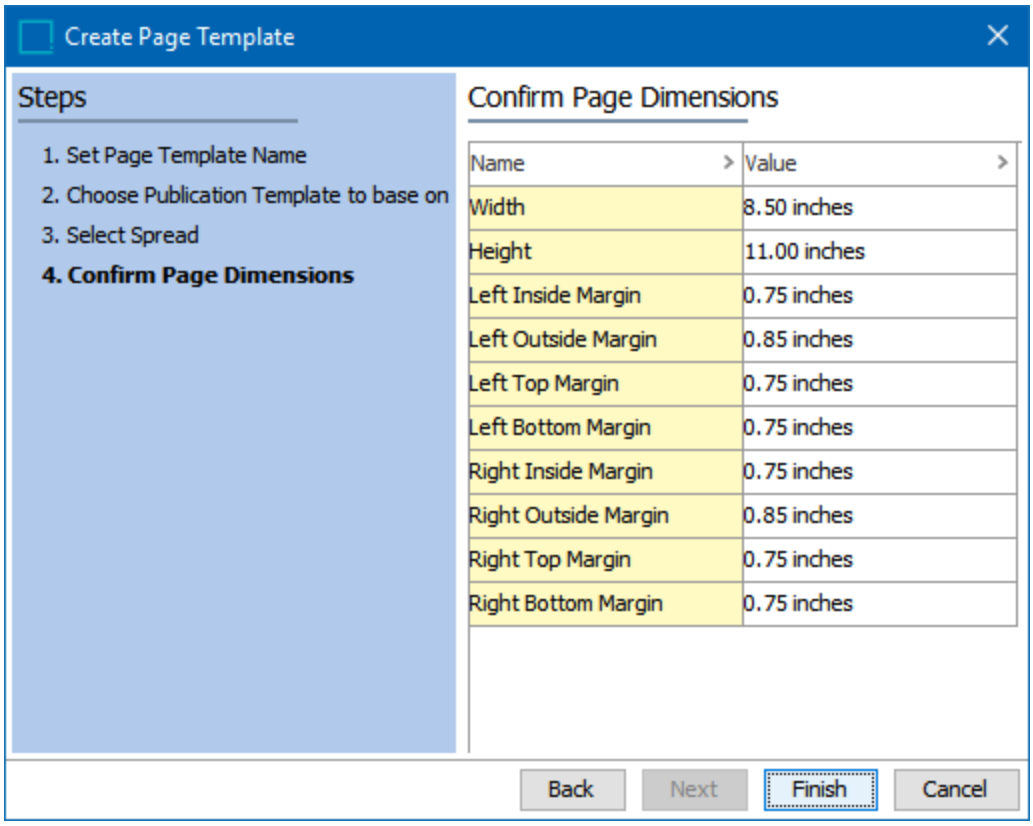
   The below screenshot shows how the same publication template appears in **InDesign**, with the third spread being a different page size than the others. Using the example use case provided, this spread could be used to build an order form that would be stapled into the center fold of a mail order catalog.

Note: Even though this spread appears larger than the other spreads in the wizard, the page template will correspond to the *actual* size of the InDesign master page. The wizard display only indicates that the spread is of a different size than the others.

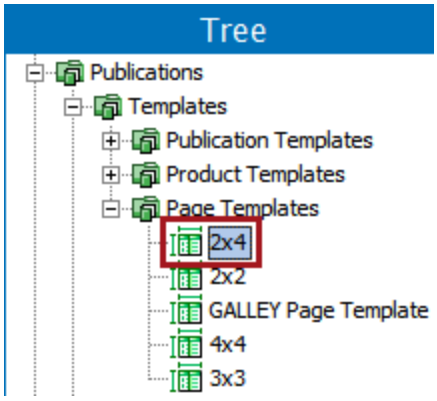


6. In the final step, **Confirm Page Dimensions**, the wizard provides an overview of the page size and margins of the new page template. If you need to alter any of the measurements, which will override the page size and margins provided by the publication template, they can be edited in the **Value** column. Click **Finish** to create the template.

Note: You can change the *margins* of the page template later, but you cannot change its *page size* once it has been created.



7. The new page template is placed inside of the publication group you initially selected.



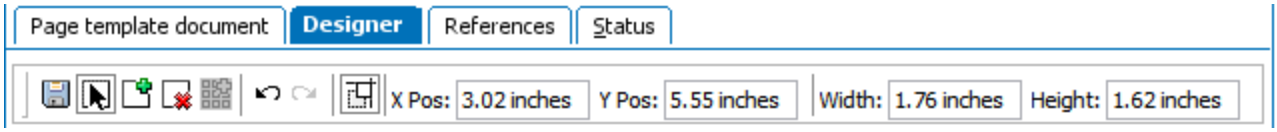
Designing Frames for Page Templates

Newly created page templates are blank and must have **frames** added before they can be used to build planned pages. The **Designer** tool in the STEP Workbench is where frames are designed and added to page templates. Multiple frames can be created at once in a selected grid layout, or they can be created individually using specified width and height dimensions.

Frames designed on a page template will appear exactly the same on the **planned page** that the page template is later applied to. The purpose of a page template is 'create once use many'; it is intended to drive the layouts of numerous pages that are basically the same. However, the frame design inherited from the page template can be overridden on the planned page if needed. Frames can be added, removed, repositioned, and resized on the **Plan** tab with the same tools used in the designer. See the **Working with Frames on Flatplanner Pages** topic for more information.

Designer Toolbar

To access the designer toolbar, click a page template in the Tree, and then click the **Designer** tab.



The following table gives a brief explanation of each option available on the toolbar.

Tool	Description
Save	Saves all changes
Select	Used to select and move frames and content on the page by dragging them.
Add frame	Used to add new frames by clicking and dragging the mouse.
Delete	Used to delete a frame. Delete is only enabled when one or more frames are selected.

Tool	Description
Insert frames on a grid	Used to insert multiple frames in a grid on the page.
Undo	Used to undo your last action.
Redo	Used to redo your last action.
Snap positioning toggle button	Used to enable or disable snapping of frames when they are moved or re-sized. Enabling this option will cause a green guide line to appear on the page when a frame is moved near other frames, either on the same page, or the facing page. Snapping the frame to the green guide line will automatically aligns the frame you are dragging with another frame on the page.
X Pos	Shows the horizontal position of a selected frame. If more frames are selected, the horizontal position is only displayed if it is the same for all selected frames. To change the horizontal position of a frame, enter a new value in the X position field.
Y Pos	Shows the vertical position of a selected frame. If more frames are selected, the vertical position is only displayed if it is the same for all selected frames. To change the vertical position of a frame, enter a new value in the Y position field.
Width	Shows the width of a selected frame. If more frames are selected, the width is only displayed if it is the same for all selected frames. To change the width of a frame, enter a new value in the Width field.
Height	Shows the height of a selected frame. If more frames are selected, the height is only displayed if it is the same for all selected frames. To change the height of a frame, enter a new value in the Height field.

Working with Frames in Page Templates

This topic describes how to work with frames and pages in Flatplanner page templates, including how to add, remove, reorder, and resize frames, as well as how to zoom in and out of pages and copy and paste pages.

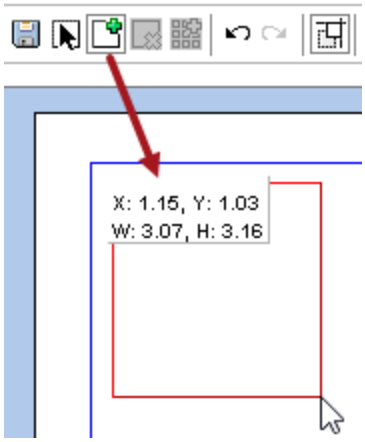
Note: Designer actions taken on page templates are not automatically saved. Click the save icon frequently to ensure that changes are not lost.

Add Frames

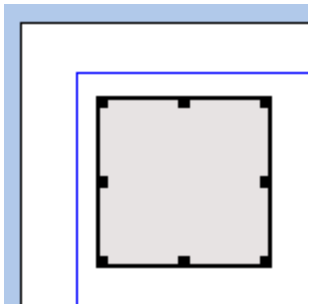
The following instructions explain how to add frames on an individual basis and how to add multiple frames at once.

Add an Individual Frame

1. Select the **Add Frame** tool in the toolbar.
2. Drag an outline of the frame with the cursor while holding down the left mouse button. The X, Y, W, and H coordinates automatically calculate as you draw the frame.

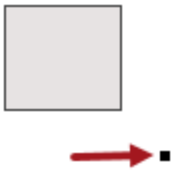


3. Release the mouse button to create the frame.



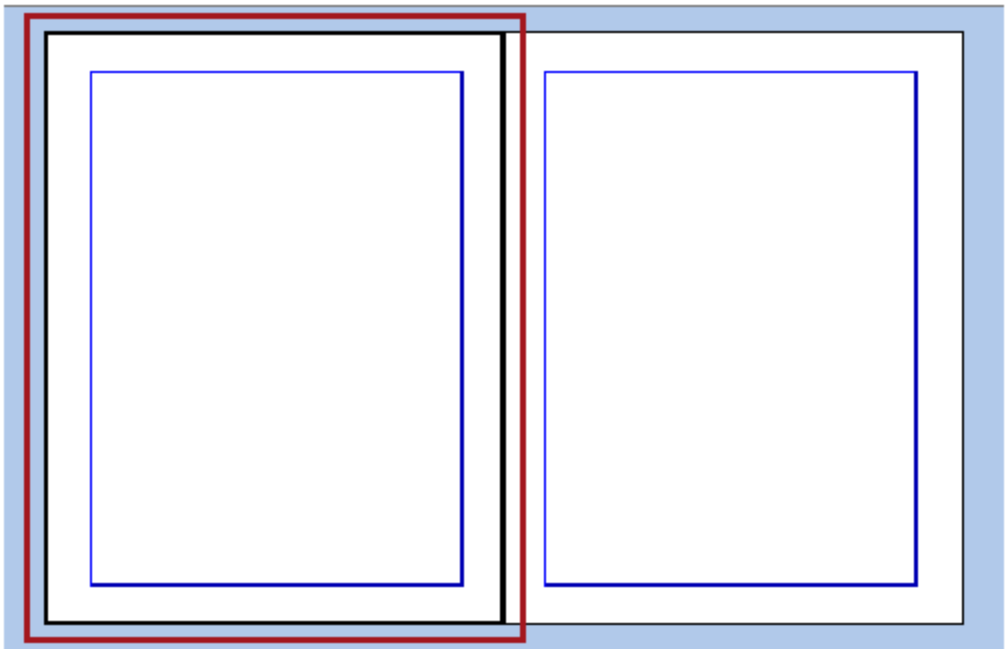
4. If the frame is at the desired size, click the **Select** tool in the toolbar, then click outside of the frame to remove the black drag handles from the frame.

> **Note:** If you don't click the **Select** tool before clicking out of the frame, the **Add Frame** tool will still be activated, and the system will think you want to create a new frame. If this happens, a tiny frame that looks like a black square will display when you click outside of the frame. You will either have to click **Undo** to remove it, or select it using the **Select** tool to resize it. See the 'Select Frames' subsection below for information on how to select frames.

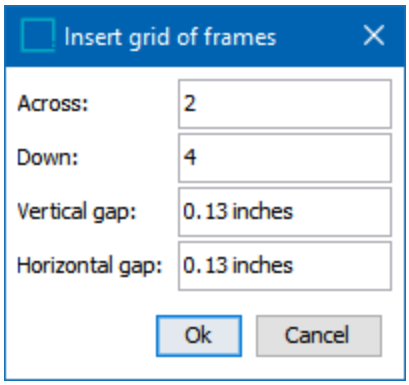


Add Multiple Frames in a Grid

1. To quickly create many frames in a grid, first click on a page. The selected page will be surrounded with a thick black border.



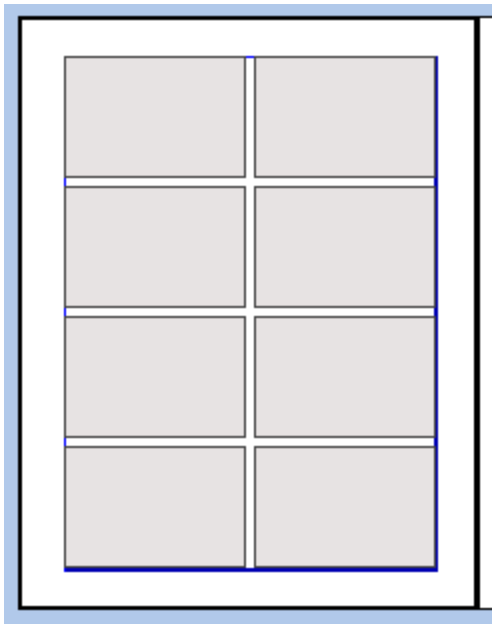
2. Click **Insert frames on a Grid** in the toolbar. The **Insert grid of frames** dialog displays.



- In the **Across** field, enter the number of *rows* of frames to insert.
- In the **Down** field, enter the number of *columns* of frames to insert.
- In the **Vertical Gap** field, enter the amount of distance that should appear between the rows of frames.
- In the **Horizontal Gap** field, enter the distance between the columns of frames.

Note: The STEP interface will only accept numbers with up to two decimal points. If a value such as 0.125 is entered, the system will round it up to .13. However, the gap will display correctly on the mounted page.

3. Click **OK** to insert the frame grid on the selected page.

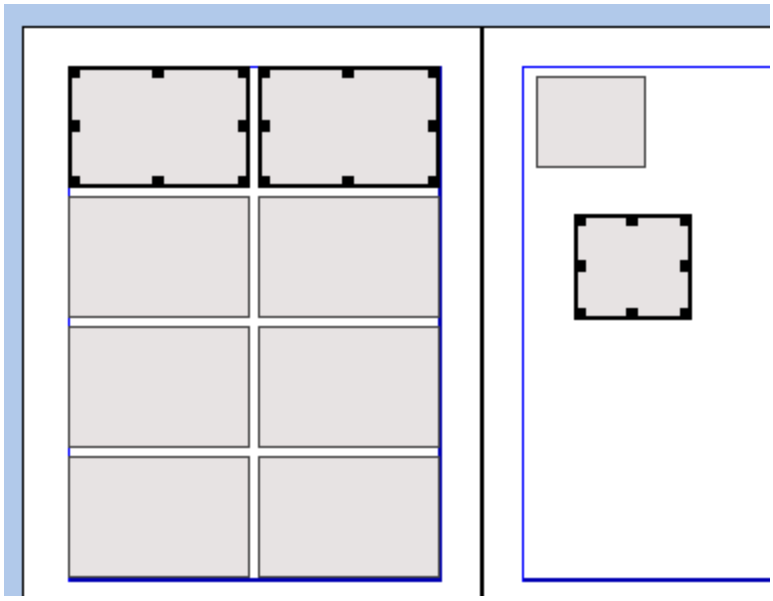


Select Frames

Two methods can be used to select frames: either **click** them with your mouse, or **drag** a bounding box around them while holding down the left button on your mouse.

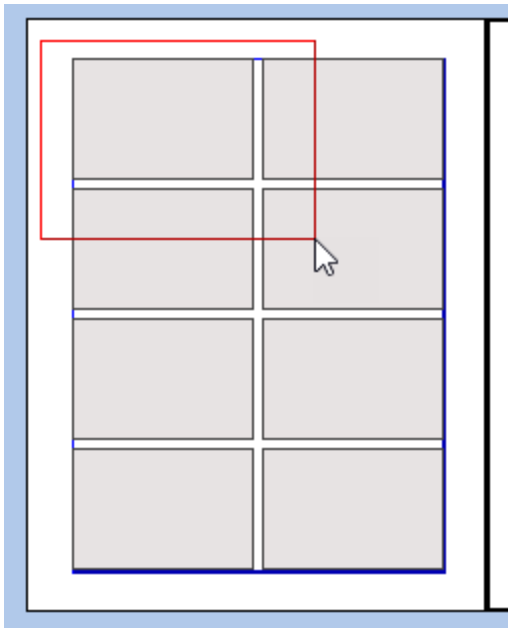
Mouse Click Method

1. To select a frame, click the **Select** tool in the toolbar, then click on a frame. A black border with drag handles (used for resizing) will display on the frame.
2. To select multiple frames, click the frames while holding down the Ctrl or Shift key.

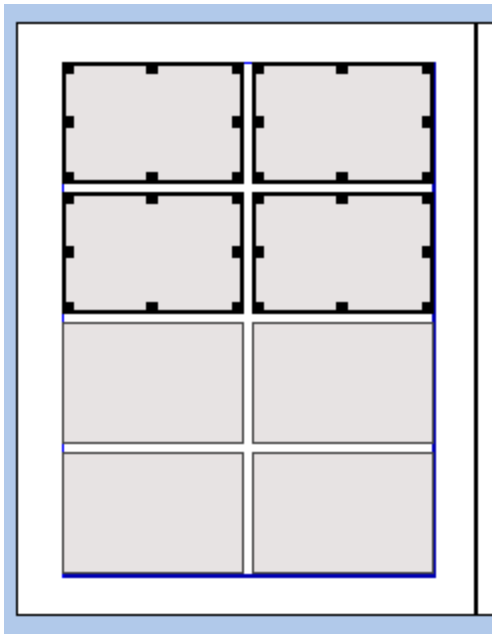


Mouse Drag Method

1. With the **Select** tool enabled, left-click *outside* of a frame on your page, then hold down the mouse button to 'draw' a red box around the frames that you want to select. The red box does not have to technically be around the frames; it will select any frames that it touches.

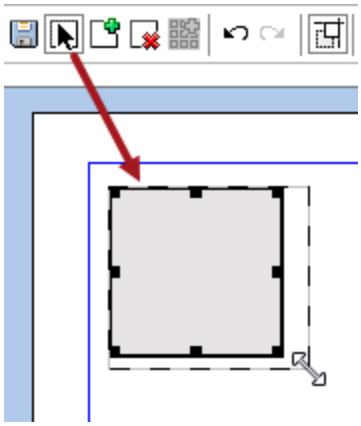


2. Release the mouse button. The frames will be selected.



Resize Frames

1. Click the **Select** tool in the toolbar , then select the frame.
2. Hold down the left bottom on your mouse, then drag the handles on the frame border until the frame is at the desired size.



3. Release the mouse button to finish resizing the frame.
4. Alternatively, enter a new value for one or more selected frames in the **Width** and **Height** fields in the toolbar. See the 'Change Frame Properties' subsection below for more information.

Delete Frames

To delete a frame, perform one of the following actions:

- Select a frame or frames with the **Select** tool, then click the **Delete frame** button in the toolbar.
- Select one or more frames, then press the **Delete key** on your keyboard.
- Right-click on a frame, then select **Delete frame** from the menu.

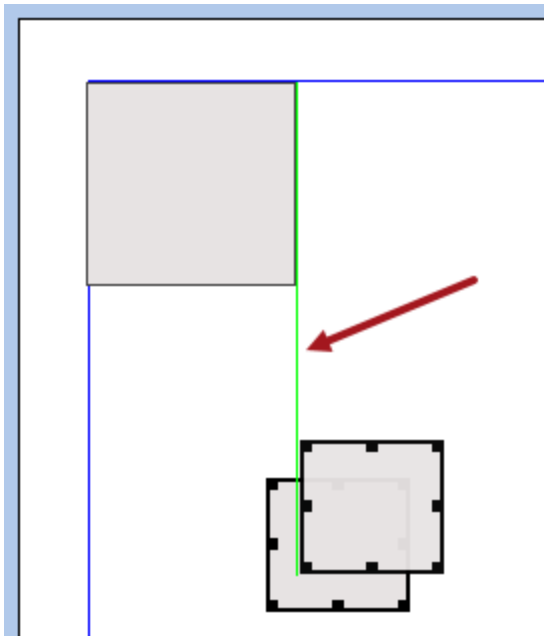
Move Frames

To move a frame, choose the **Select** tool in the toolbar, then click on the frame and hold down your left mouse button while dragging the frame to its new position. Release the mouse button to drop the frame.

You can also set the X and Y position of one or more selected frames by entering a new value in the **X Position** field and **Y Position** field.

Enable Snap Positioning

When moving frames on the page using drag and drop, it can be useful to enable Snap Positioning. This makes the moved frame snap to a position when you release the mouse button. This way you can easily place frames in the same X and Y positions on the page.



The snap positions are :

- Margin borders: Upper and right hand side border
- Frame borders: All borders

Note: Only the upper frame border and the left hand frame border of the frame that is being moved snaps.

Change the Layering Order of Overlapping Frames

Frames are placed on the page in a specific order relative to each other. Adding a new frame places that frame on top of other frames. This is only noticeable if frames overlap each other.

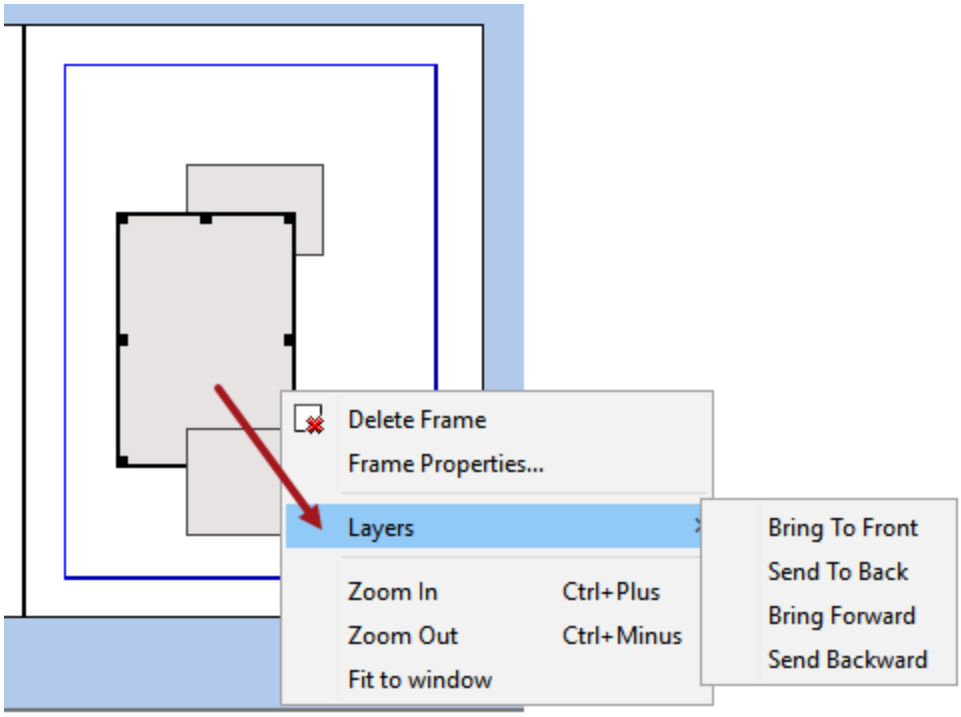
(An additional method is available for changing the order of overlapping frames by using the **Frame Properties** dialog; see the next subsection of this topic for more information.)

Note: Moving a frame from one page to another brings the frame layer to a front position.

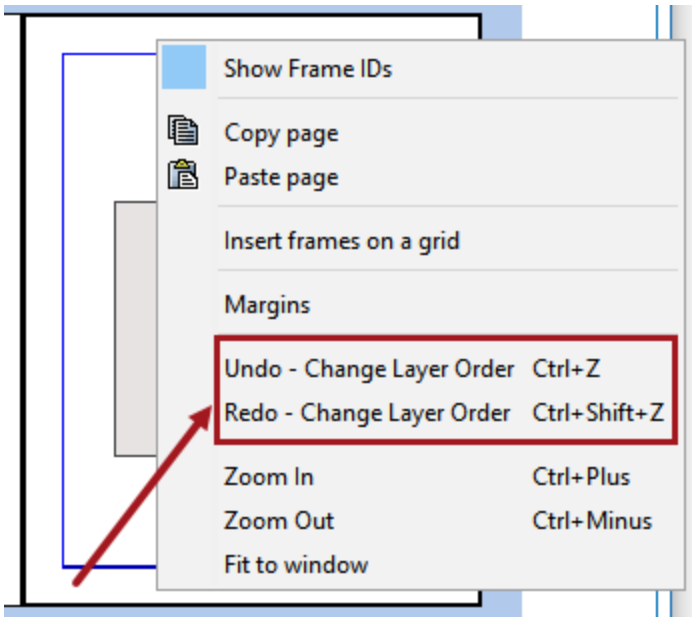
1. To change the order of overlapping frames, right-click the frame, then select **Layers**.
2. Four options are available on the **Layers** menu, though some will be grayed out if they do not apply to the currently selected frame; e.g., 'Bring to Front' will be grayed out if the frame is already in the front.

   In the below screenshot, all four options are activated since the frame is simultaneously in front of and behind another frame. (All four options are also activated if the frame overlaps no other frames at all, so it might be useful to change the order ahead of time if you already know that the frame should be in front or behind other frames.)

   - **Bring to Front**: Brings the selected frame to the front.
   - **Send To Back**: Sends the selected frame to the back.
   - **Bring Forward**: Brings the selected frame one level forward.
   - **Send Backward**: Sends the selected frame one level backward.



3. To **undo** or **redo** the last frame layering change, follow any of these methods:
   - Select a page, right-click, and select **Undo** or **Redo**.

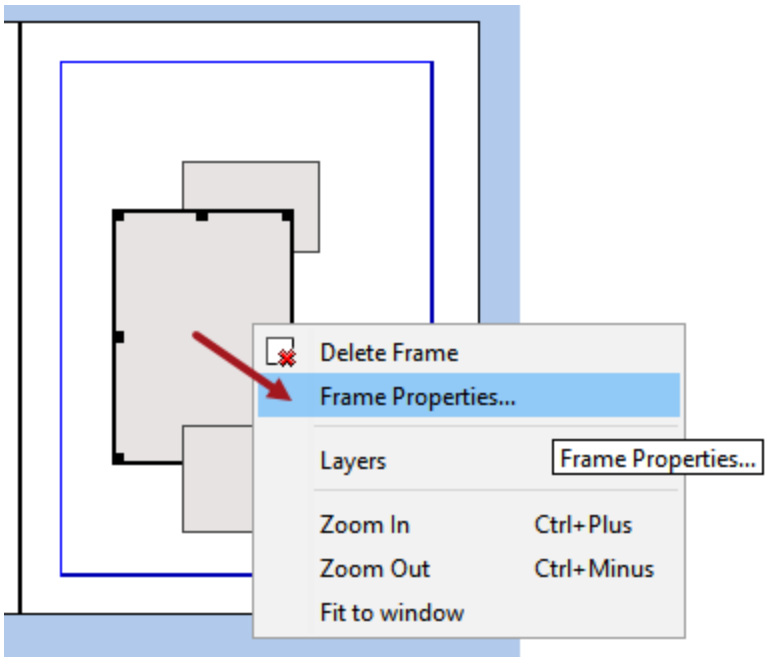


- Press **Ctrl+Z** to undo or **Ctrl+Shift+Z** to redo
- Click the **Undo** ↶ or **Redo** ↷ buttons in the Designer toolbar.

Change Frame Properties

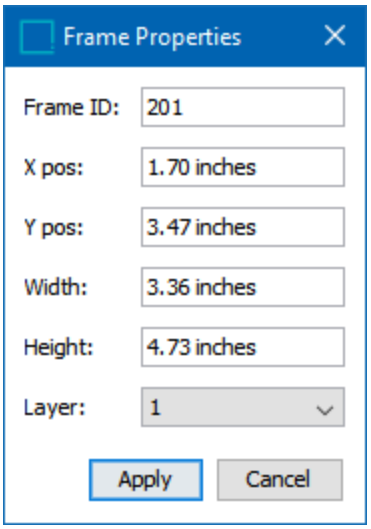
To view and maintain dimensional and positioning details of a frame:

1. Select the frame, then right-click and select **Frame Properties**.



2. In the **Frame Properties** dialog that displays, the following options are available. All options are editable.

   - **Frame ID**: Displays the ID of the selected frame.
   - **X Position**: Displays the horizontal position of the selected frame.
   - **Y Position**: Displays the vertical position of the selected frame.
   - **Width**: Displays the width of the selected frame.
   - **Height**: Displays the height of the selected frame.
   - **Layer**: Displays the order of the frame order relative to other frames on the page. '0' means the frame is in the back, '1' means the frame is in the middle, and '2' means the frame is in the front.

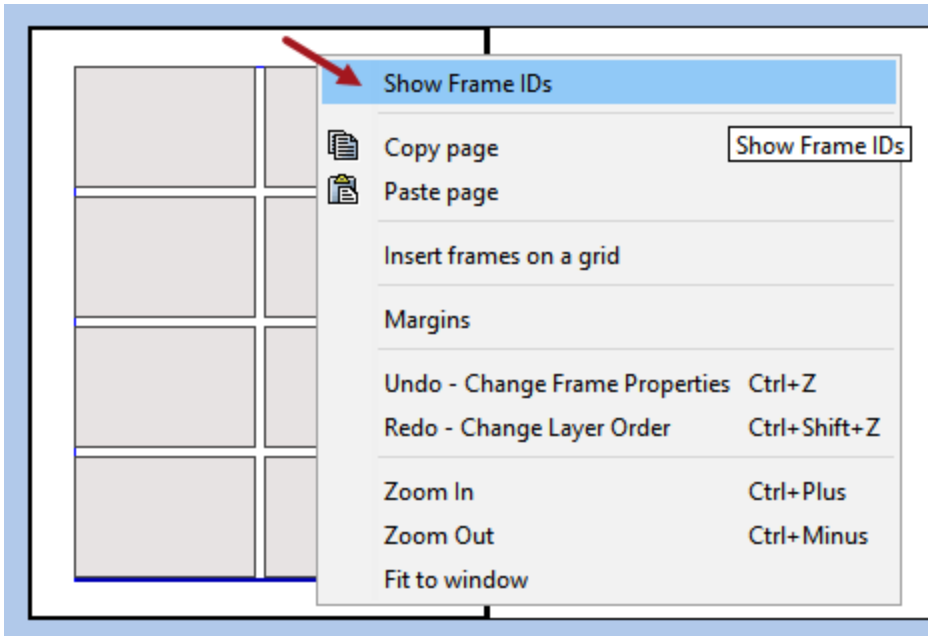


View Frame IDs

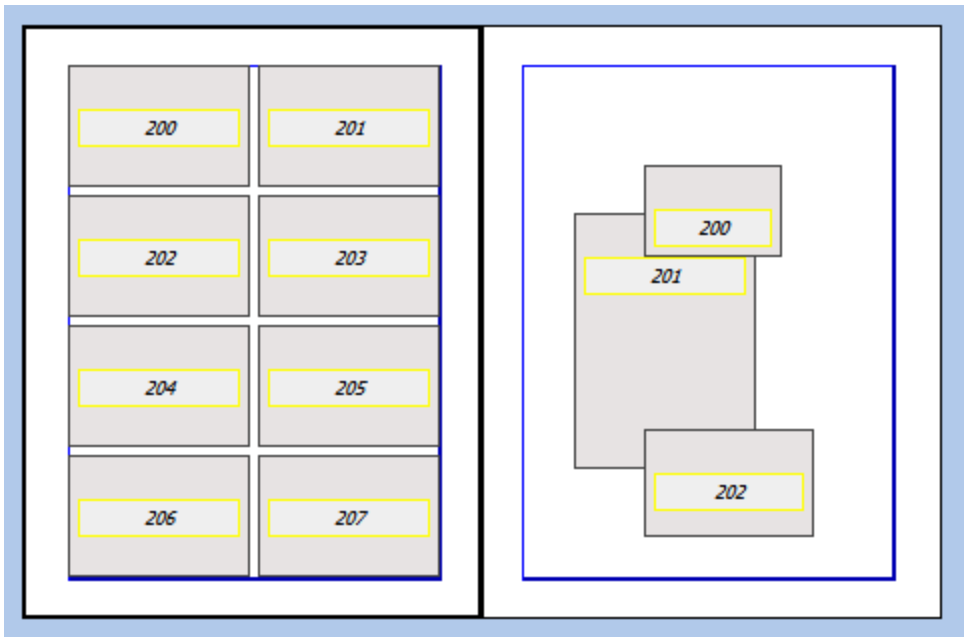
Each frame on a page has an ID, which is primarily used to identify which products and product templates are linked to each frame for the purpose of importing and exporting Flatplanner publications using Publication Excel files. Frame IDs inherit to the corresponding frames on planned pages, and can be overridden at the page level. For more information, see the **Exporting and Importing Flatplanner Publications** section of this guide.

Show or Hide Frame IDs

1. To show the ID of the frames on a page or spread (both left and right pages), right-click a page and select **Show Frame IDs**.



2. The frame IDs are shown for all frames on both pages in the spread. The IDs display in small boxes in the frames.

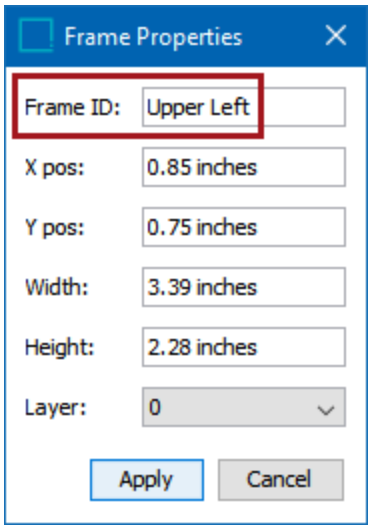


3. To hide the frames, right-click a page, then deselect **Show Frame IDs**.

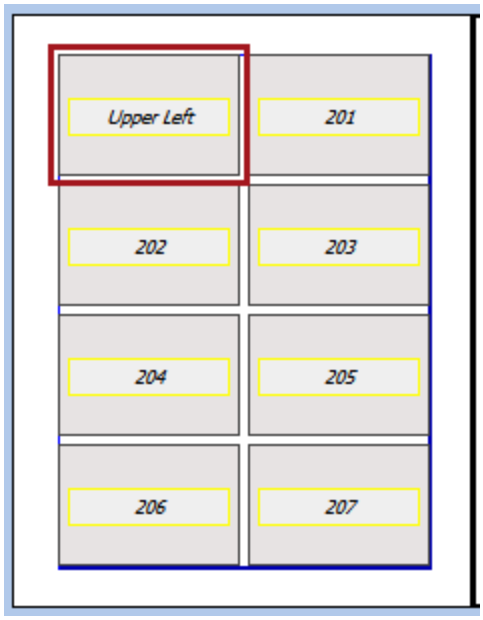
Change Frame IDs

By default, frame IDs start numbering on each page at 200. These IDs can be changed to make identification of the frames easier. For this example, the ID of the frame in the upper left corner of the left page (shown in the previous screenshot) will be changed from '200' to 'Upper Left.'

1. To change the ID of a frame, right-click the frame and select **Frame Properties**.
2. In the 'Frame Properties' dialog, type a new ID for the frame in the **Frame ID** field, then click **Apply**.

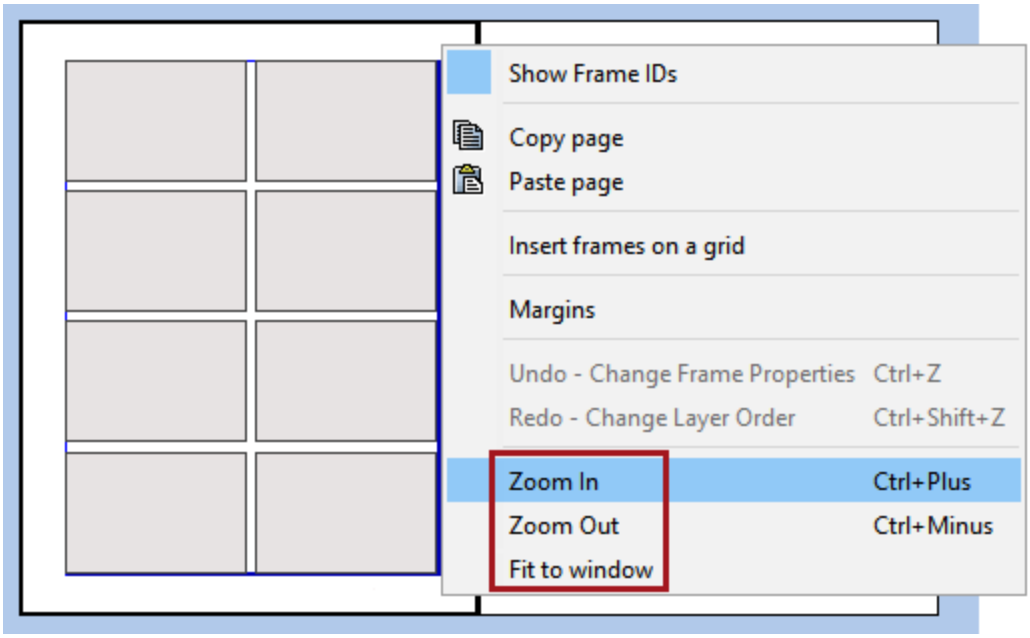


3. The ID of the frame is changed.



Zoom In, Zoom Out, and Fit to Window

Several different methods are available for zooming in and out on pages: right-click menu options, key combinations, and the mouse scroll wheel. When working on Flatplans themselves (planned pages), a zoom slider bar is also available, but is not available when working with page templates. To instantly make a page large enough to fit the entire width of the workbench window, use the 'Fit to Window' option.



Right-click Menu Options for Zoom

1. To zoom in, right-click the page and select **Zoom In**.
2. To zoom out, right-click the page and select **Zoom Out**.

Key Combinations for Zoom

1. To zoom in, select a page, then press **Ctrl+Plus**.
2. To zoom out, select a page, then press **Ctrl+Minus**.

Mouse Scroll Wheel for Zoom

1. To zoom in, select a page, then scroll your mouse wheel downward.
2. To zoom out, select a page, then scroll your mouse wheel upward.

Zoom Slider Bar

Drag the blue slider on the zoom bar to zoom in or zoom out on pages. Only available for Flatplans.

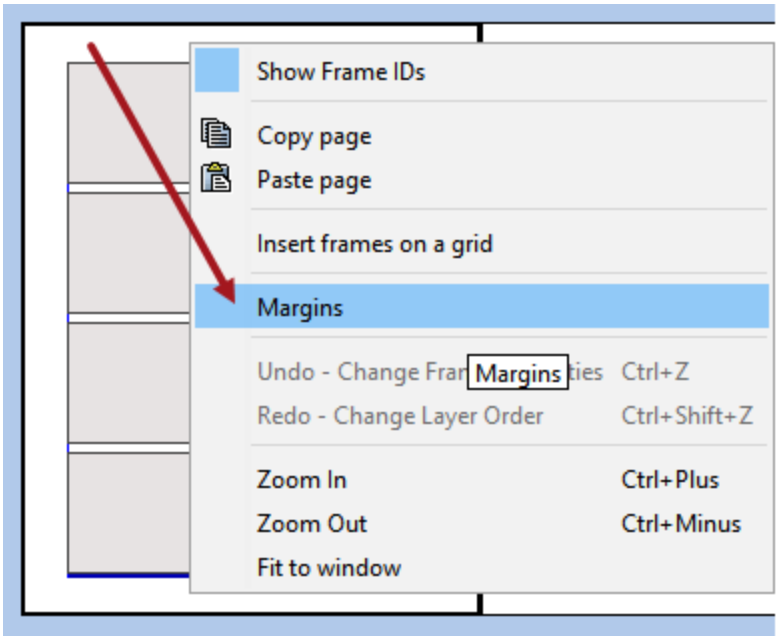
Fit to Window

To automatically zoom in on a page to fit the width of your workbench UI, right-click a page and click **Fit to Window**.

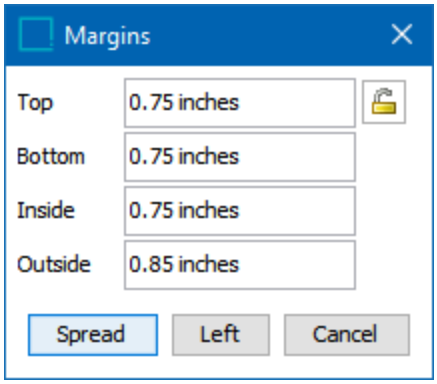
Change Page Margins

By default, page templates pick up the margins from the publication template spread they were created from. Subsequently, planned pages pick up the margins set on the page template, but can be overridden later at the page level. To change the margins of a page:

1. Right-click the white area on the page and select **Margins**.



2. In the **Margins** dialog box, enter the new dimensions for the margins that you want to change. If the padlock icon is set to the unlocked position , each field can be changed individually.

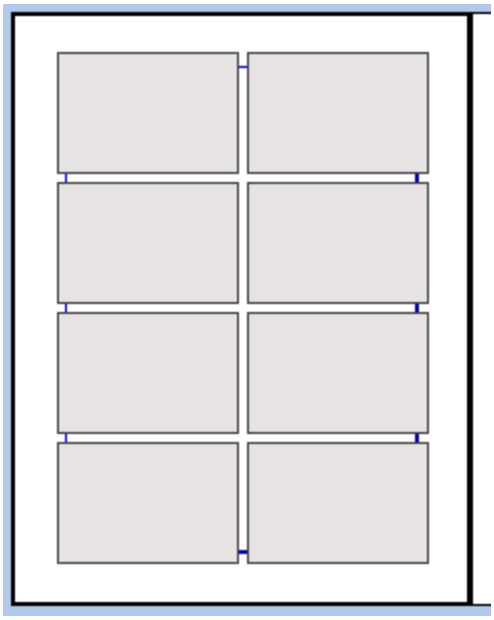


3. If you want all margins in the spread or on the page to be the same, click the padlock icon to change it to the locked position . By default, all margins will be automatically changed to match the Top margin.

   To change all margins to something other than the Top measurement, enter a different value in any field, then click into another field to make the changes.

4. Click **Spread** to apply the changes to both pages, or click **Left** to only apply the changes to the left page. (The button will display **Right** if the right page is selected.)

Note: Changing the margins will *not* change the size of the *frames* on the page. For example, if you previously created frames to align with 0.5 inch margins, then later changed the page margins to 1.0 inches, the frames will not shrink to fit inside of the new margins, as shown below:

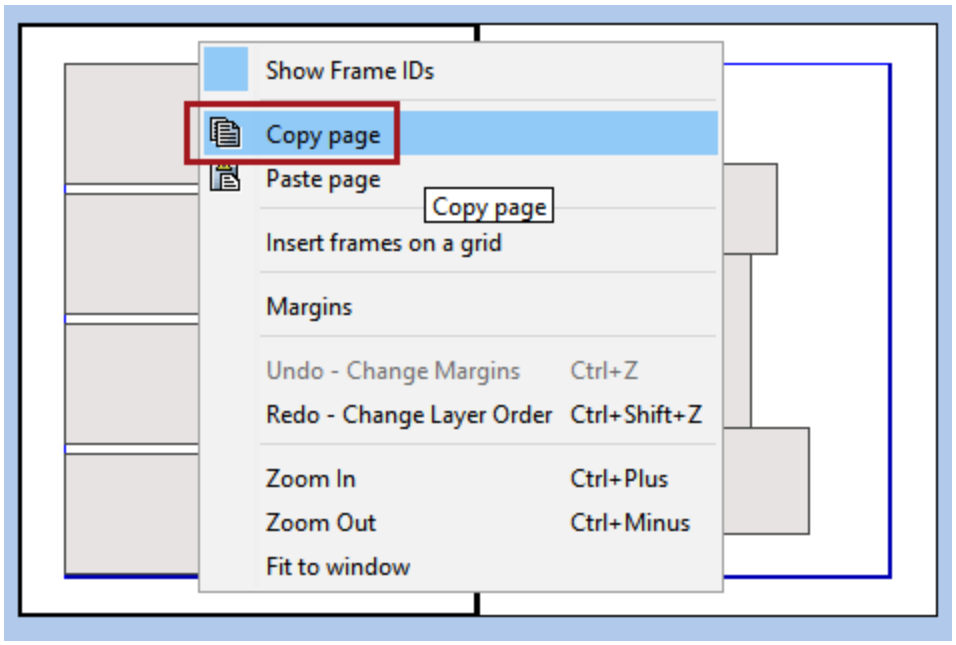


Copy and Paste Pages

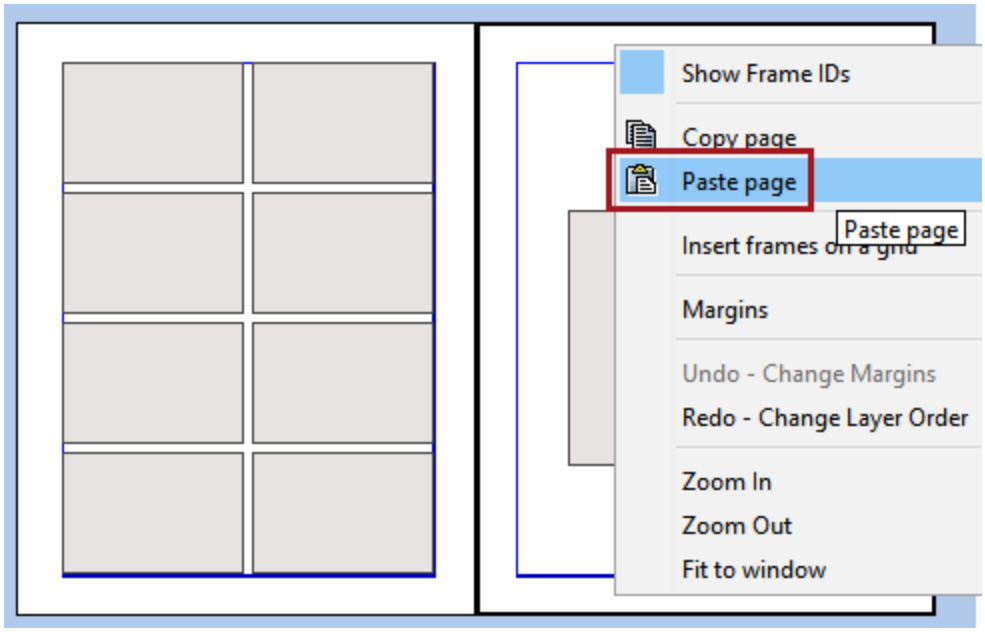
It is possible to copy and paste a page onto another page, including frames. You can copy and paste pages within the same page template or spread, or from one page template or spread to another page template or spread. This simplifies the page creation process by allowing you to create frames on one page only, then duplicate the frames on other pages by copying and pasting the original page.

Note: This will only paste *frames* from one page to another; *margins* from the copied page will not be duplicated on the pasted page.

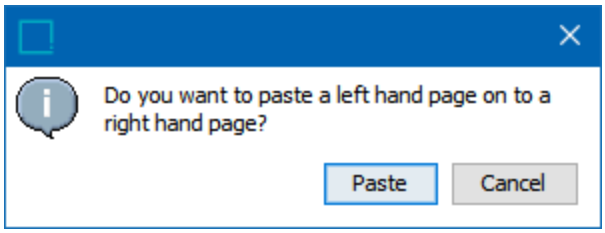
1. Right-click the page you want to copy, then select **Copy Page**.



2. Right-click the other page, then select **Paste Page**.



3. A warning will display if you try to paste a left-hand page to a right-hand page and vice versa. Click **Paste** to continue.



4. The copied page, including frames, is pasted.

Creating Page Templates in InDesign

This section describes how to create a page template in InDesign, apply layout styles to the page template, and how to store the page template locally and/or in STEP. Just like with page templates created in the workbench, page templates created in InDesign use frames to determine where products, images, and free text can be placed, as well as which product templates apply to which frames.

Though it is almost always recommended to create page templates directly in the page template **Designer** tool in the STEP Workbench, there are certain exceptions where the page template must be created in InDesign:

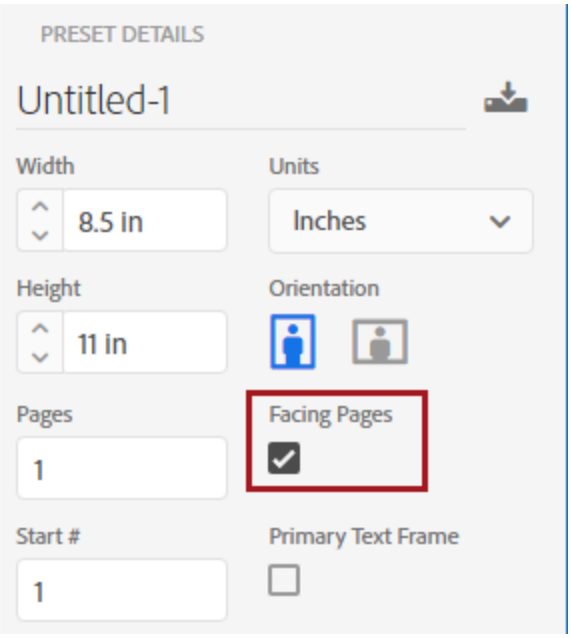
- **Galley** page templates must be created in InDesign.
- Page templates where **styling** is needed in the Flatplanner frames must be created in InDesign, though this is uncommon. Typically, all styling is handled on product templates and publication templates / mounting pages.
- Layouts where Flatplanner frames must be very precisely aligned against each other with no or extremely little space in between (also uncommon, but may be helpful for layouts such as coupon flyers). Using InDesign to create these types of page templates will give a more precise level of control over frame alignment than what is available in the Designer tool in the workbench.

Note: Before you can use InDesign-created page templates with Flatplanner, the templates must first be saved back to STEP and assigned to a publication.

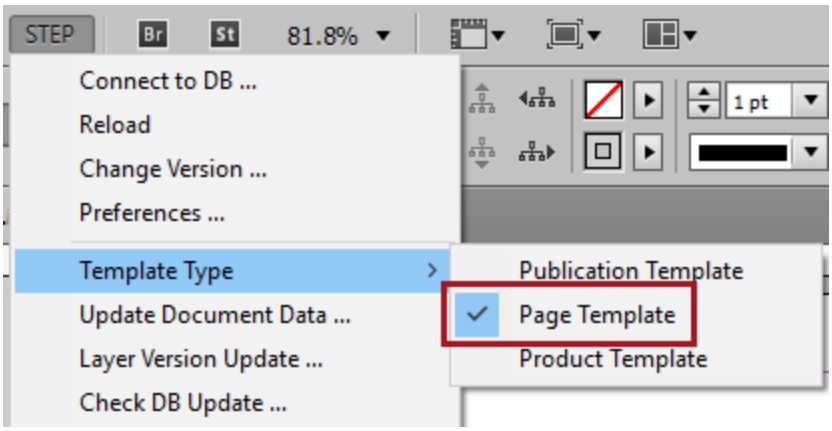
Creating a Page Template in InDesign

To create a page template in InDesign:

1. Create a new InDesign document that has the same page size and margins as the publication template being used in the publication.
2. Since this document must be a two-page spread with facing pages, check the **Facing Pages** box in the New Document dialog in InDesign.



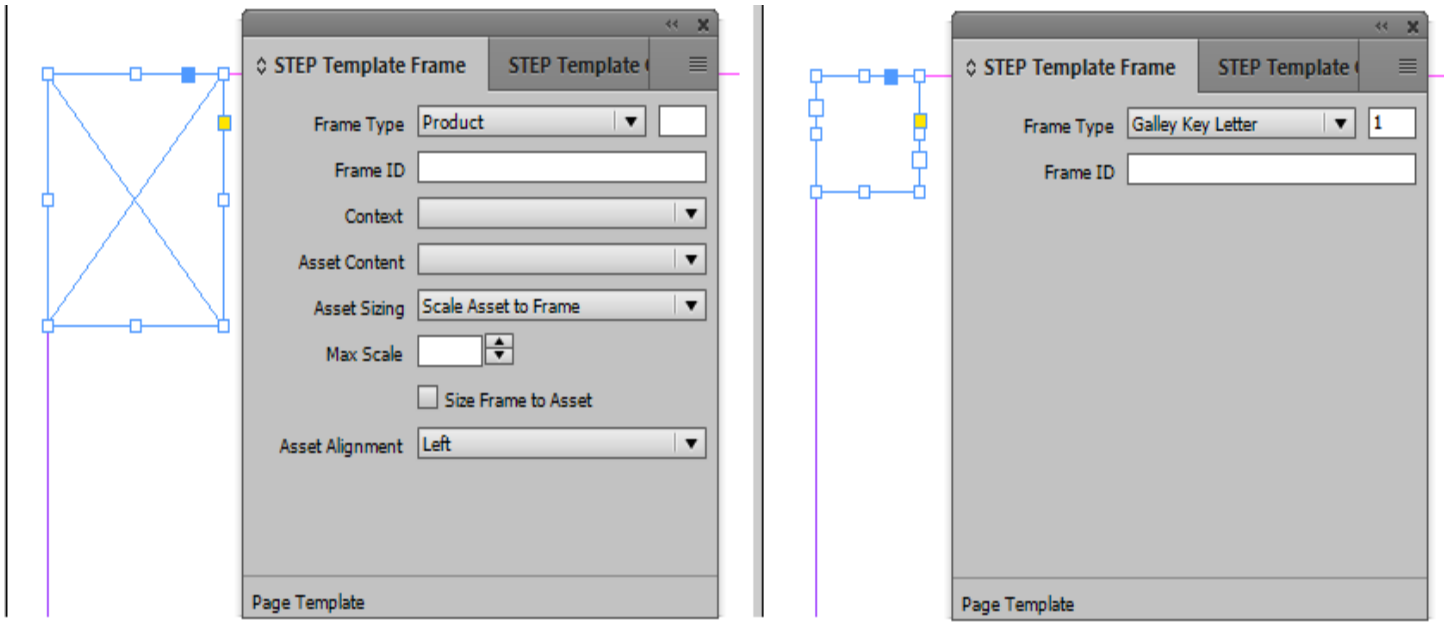
3. Navigate to STEP > Template Type and choose **Page Template**.



Applying Frames to the Page Template

To complete the page template, frames must be added to it. Frames are added from the **STEP Template Frame** panel.

1. Open the STEP Template Frame panel by navigating to Window > STEP Template Frame.
2. Draw either a text frame using the Type tool (T) or an image frame using the Rectangle Frame tool (F).
3. With the frame selected, choose the desired frame type from the **Frame Type** dropdown list. The following screenshots show the available options for image frames (L) and text frames (R).



4. Repeat step 2 - 3 for each element you want to allow on the pages in your publication.

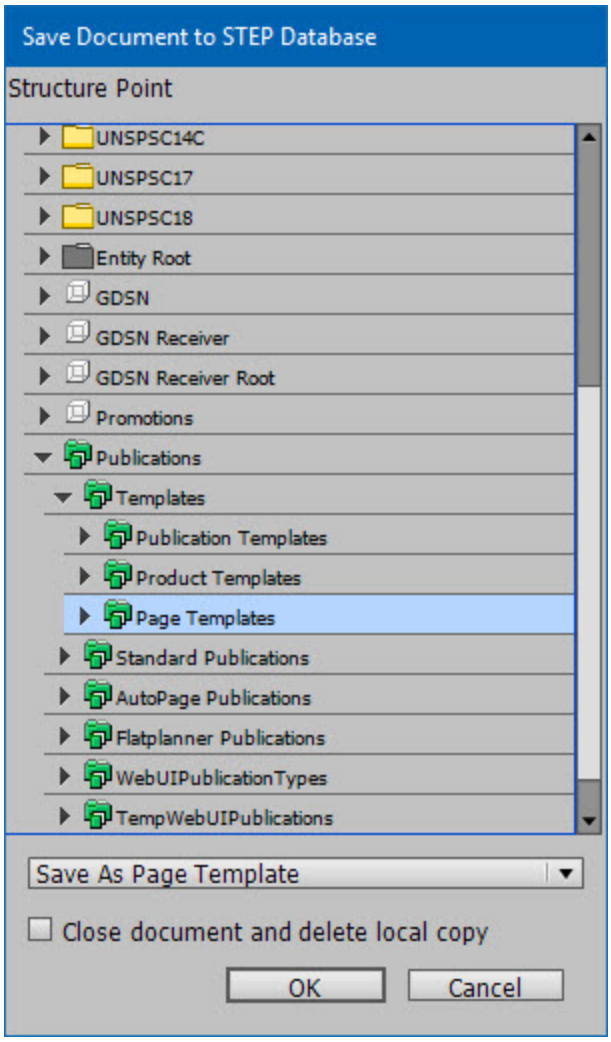
When the pages with the different frame types are viewed in the Flatplanner **Plan** view, each frame type is represented by a colored square. Frames that do not have any products linked display as gray squares. Frames with linked products are shaded light blue. Galley text frames display as green. For more detailed information about galley templates, see the **Galley Templates** section of the **Flatplanner** documentation.

Storing the Page Template

Once you have created a page template, it must be saved to STEP in order to use it in conjunction with Flatplanner, as well as to make it available to other STEP users.

To store the template in STEP:

1. Save the InDesign document on your local hard drive as a standard InDesign file (suffix .indd).
2. In the STEP menu, click 'Save Document to DB.' A Save Document to STEP Database dialog box appears.



3. Select the publication group you want to save the document to, then select **Save as Page Template** from the dropdown list.
4. Click **OK**.

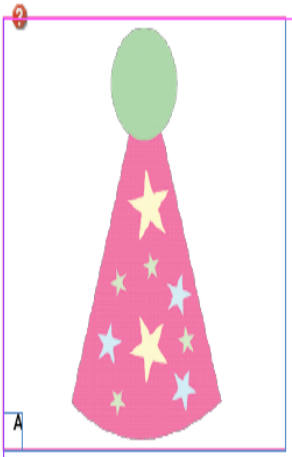
Galley Templates

The 'galley' format is a common layout style for retail catalogs. Galley layouts incorporate the use of Key Letters, which connect product images with the text that describes the product. To build a Galley Page layout in STEP, Galley Page Templates are used in conjunction with Galley Product Templates. Both types of Galley Templates are supported by Flatplanner publications only.

The following is an example of a Galley Page created from STEP. Notice how images are separate from the text, which appears at either the bottom or the side of the page. Each image is identified by a Key Letter (A, B, C, etc.) that correlates it to the corresponding text across the bottom or the side of the page.

Party Hats

Acme Party Supplies


A

B

C

A. Pink & Green Party Hat
Celebrate any occasion with this pink and green party hat!
Suitable for all ages.
Exclusive
$2.99 / Ea.

B. Cosmic Party Hat New!
Cosmic hat for a party that's out of this world!
Suitable for all ages.
$3.99 / Ea.

C. Dog Party Hats Assortment New!
It's your dog's birthday - raise the "woof"!
Set of five. Purple, gold, blue, pink, and green.
Specify small, medium or large.
Exclusive
$19.99 / Case

Party Hats

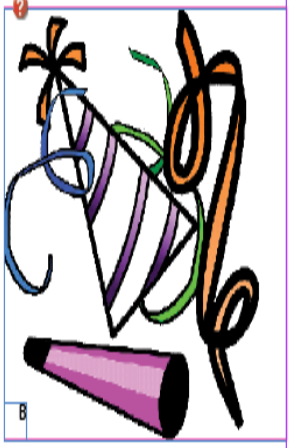
Acme Party Supplies

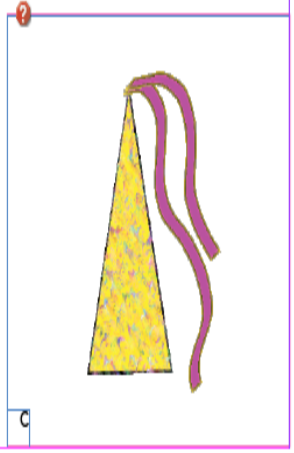
A. Pink & Green Pom-Pom Hat New!
Celebrate any occasion with this pink and green party hat!
Suitable for all ages.
Exclusive
$2.99 / Ea.

B. Purple & White Party Hat
Celebrate any occasion with this purple and white party hat!
Suitable for all ages.
$4.79 / Ea.

C. Yellow & Pink Party Hat New!
Celebrate any occasion with this yellow and pink party hat!
Suitable for all ages.
$5.29 / Ea.

A


B


C

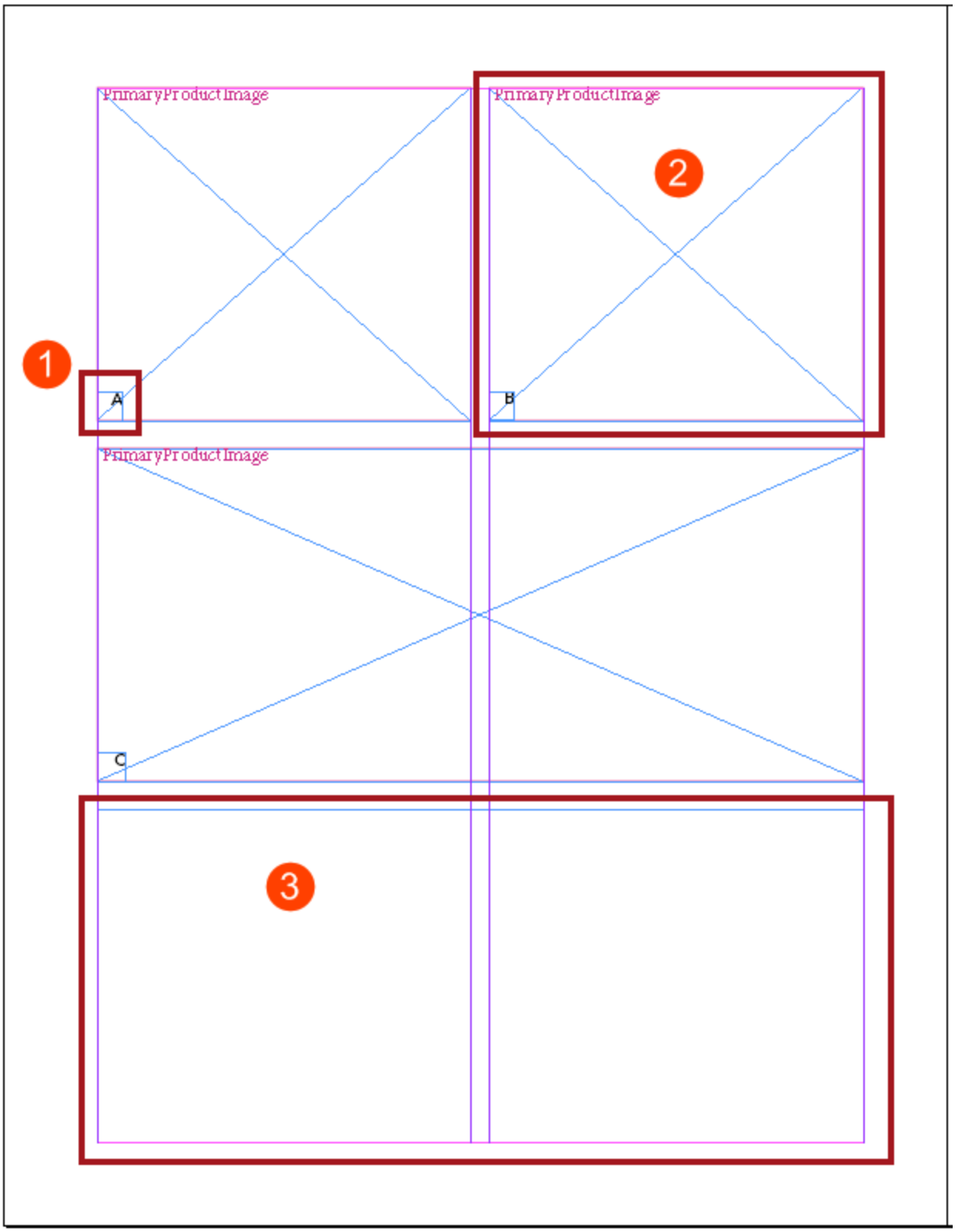
Galley Page Templates

Unlike standard page templates, which are typically created in the workbench, Galley page templates are created in InDesign.

Galley page templates use **key letters**, which must be designated in the page template in InDesign.

The following types of frames are used in Galley page templates:

1. Galley key letter
2. Image frame
3. Galley text frame



Optionally, Galley page templates can also contain the following additional frame types:

- Text frames containing attribute references
- Standalone image frames that are not connected with key letters
- Standalone product frames that are not connected with key letters and can be linked to non-Galley product templates

For more information on these optional frame configurations, see the **Advanced Galley Page Template Frame Options** topic.

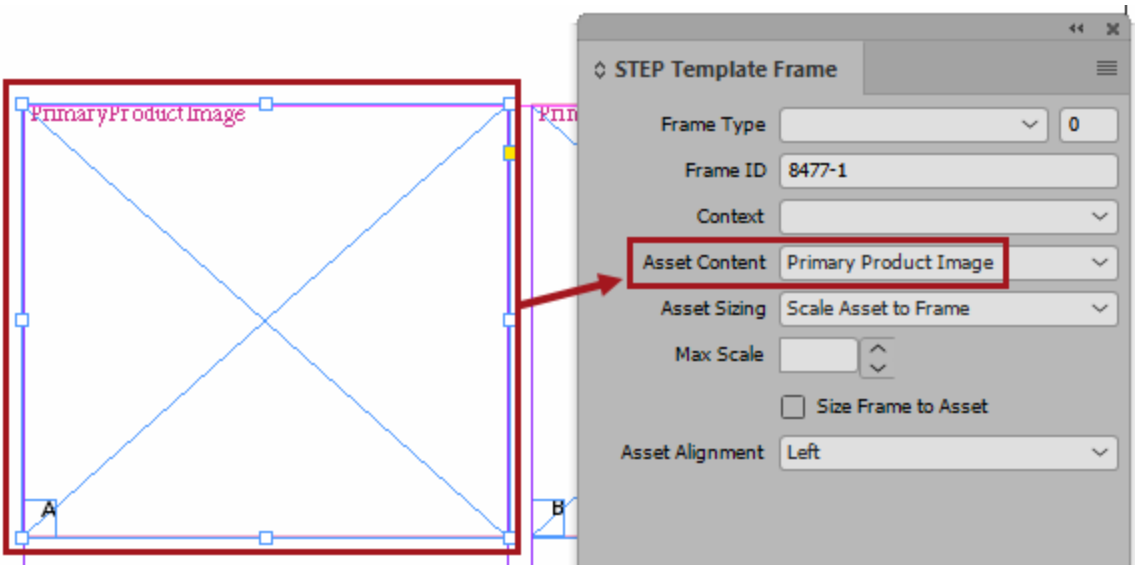
Grouping and Configuration of Key Letters and Image Frames

Galley page templates typically use three types of frames: image, Galley key letter, and Galley text.

Image Frames

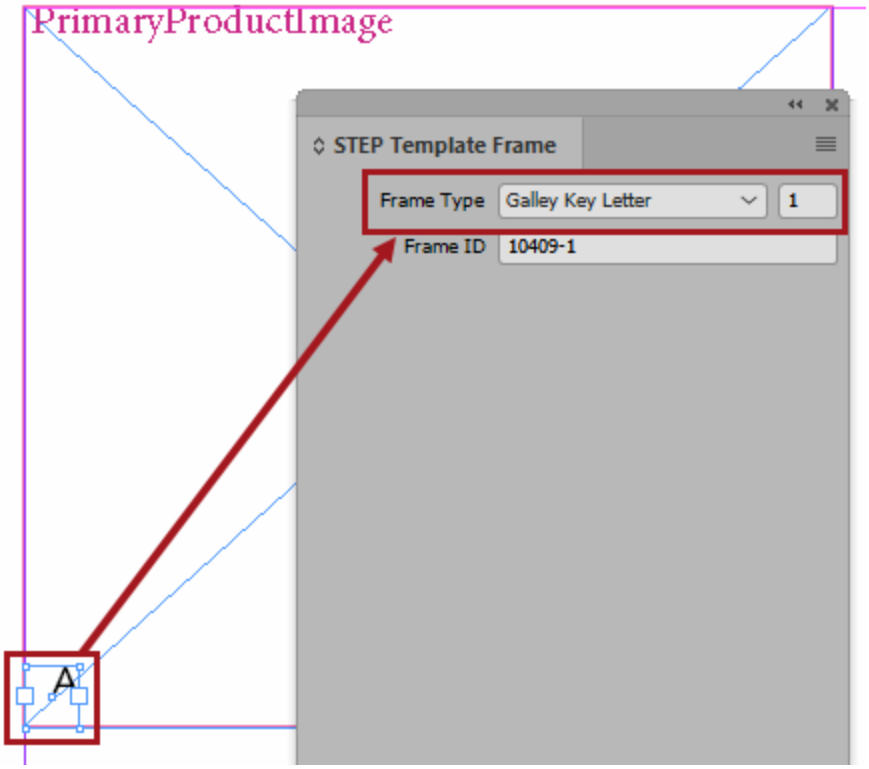
Image frames should be configured in the **STEP Template Frame** panel to call out an image reference type. This is nearly identical to product template functionality. A frame *type* is not assigned to the image frame; the only time that a frame needs to be designated as an 'image' is if an image asset will be dragged directly into that square in the Flatplan. Recommended practice for images on Galley pages is to only use one image per reference type. Note that Frame IDs are automatically generated, as they must always be unique.

Image scaling options (Asset Sizing) can also be set on these image frames using the STEP Template Frame panel. For more information about these available options, see the **STEP Template Frame** section of the **STEP Publisher** documentation.

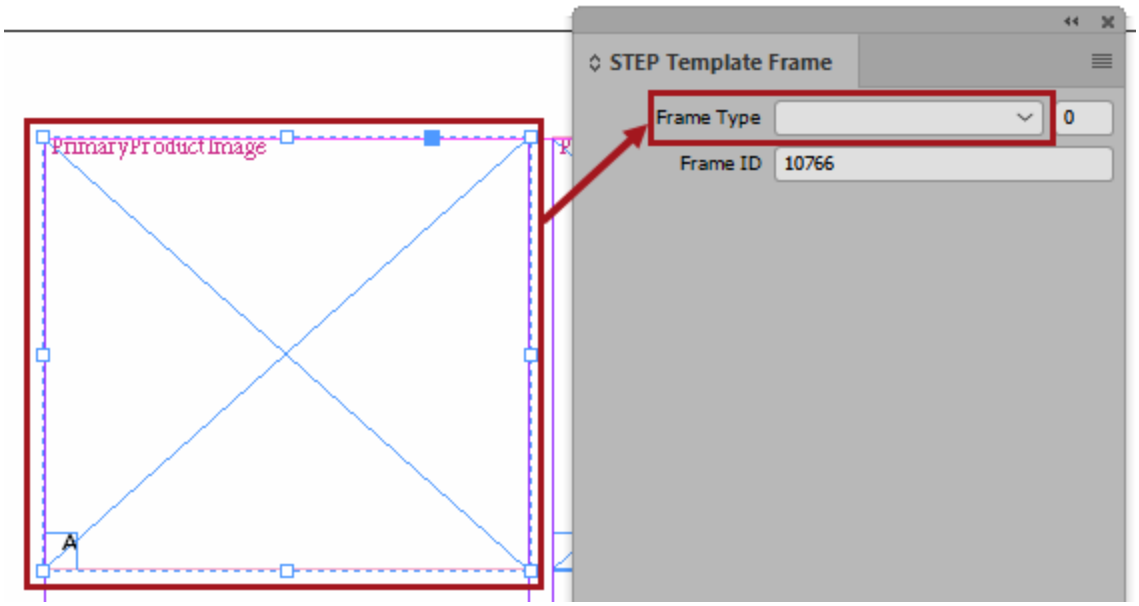


Galley Key Letter Frames

The Galley key letter frame should be a standard text box with the letter / number manually entered inside. This frame must be designated as a **Galley Key Letter**. The number in the small box next to the Frame Type field indicates the order in which products should appear on the page. For this example, box A will be 1, box B will be 2, and so forth.

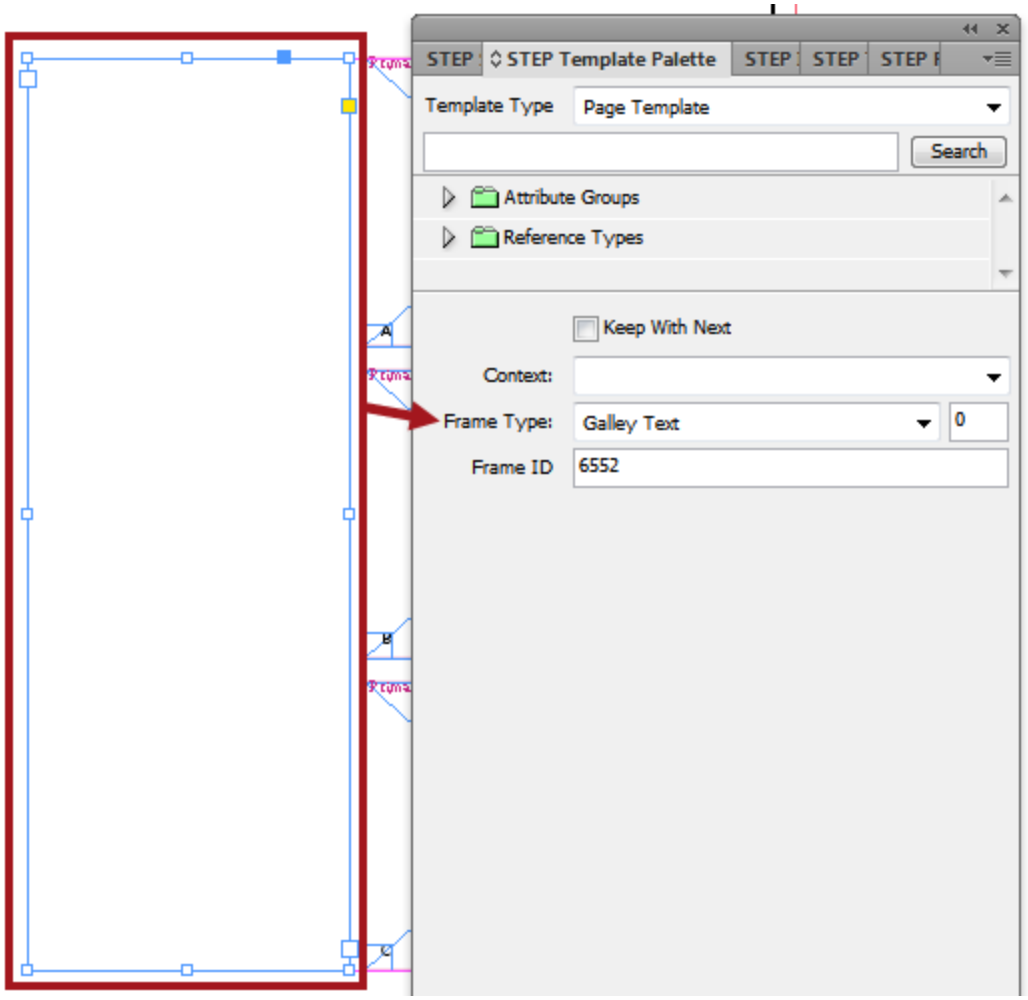


The image and Galley key letter frame must next be **grouped** together. A frame type does not need to be assigned to the grouped frames.



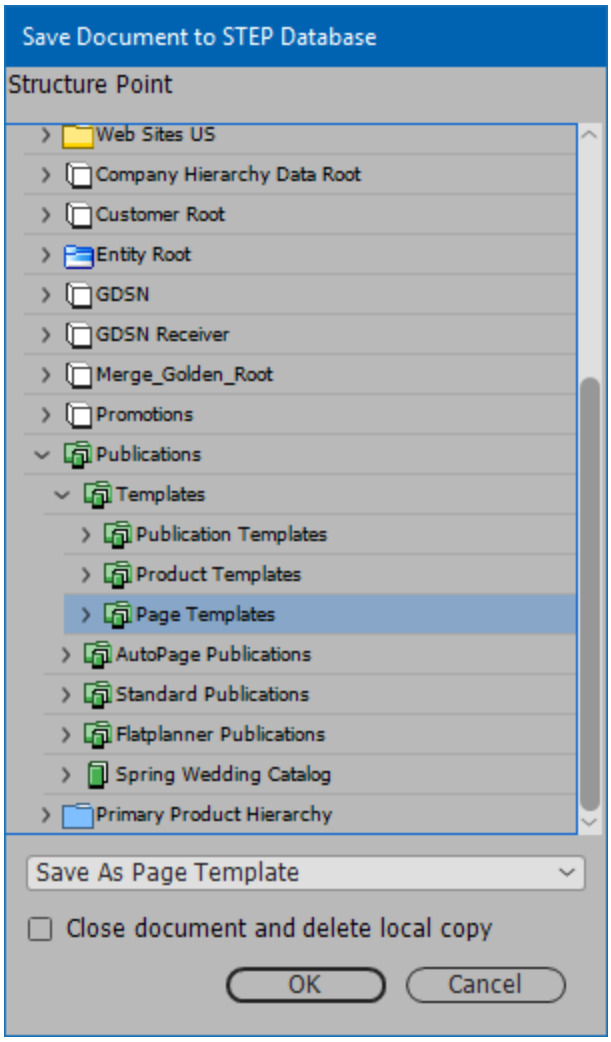
Galley Text Frame

In this example, the text frame is a single text frame across the left-side of the page. It will be designated as a **Galley Text** frame. Since text from all products will go into this single frame, it does not need a number designation.



Saving the Galley Page Template to STEP

The Galley page template will be saved to STEP from within InDesign. It will be saved as a page template to a publication group folder. See the **Creating Page Templates in InDesign** topic for more information on saving page templates to STEP.


Save Document to STEP Database
Structure Point
Web Sites US
Company Hierarchy Data Root
Customer Root
Entity Root
GDSN
GDSN Receiver
Merge_Golden_Root
Promotions
Publications
Templates
Publication Templates
Product Templates
Page Templates
AutoPage Publications
Standard Publications
Flatplanner Publications
Spring Wedding Catalog
Primary Product Hierarchy
Save As Page Template
Close document and delete local copy
OK
Cancel

Galley Product Templates

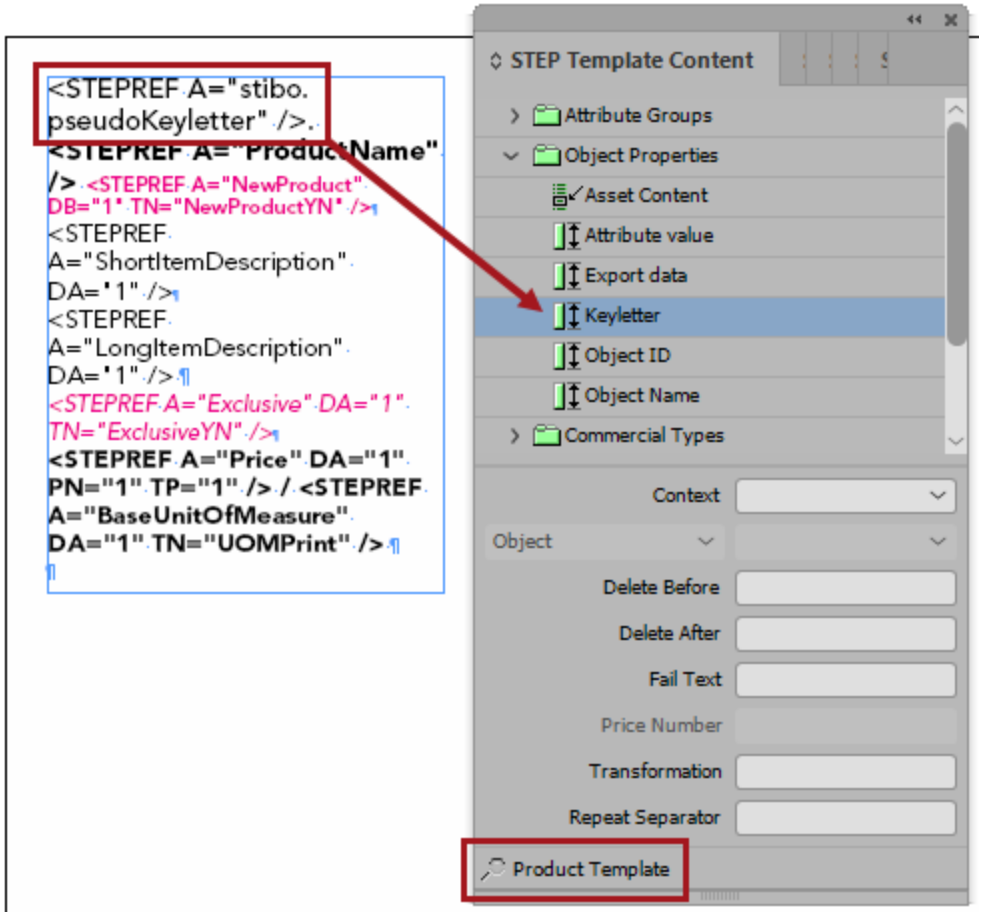
Galley product templates differ from standard product templates in that image frames are not included on Galley product templates. Images for Galley pages are handled by Galley page templates instead.

Key Letter and attribute (i.e., textual) content is all that appears in Galley product templates. All STEP tags are placed inside a single text frame.

To add the Key Letter tag to the product template:

1. Navigate to Object Properties > **Keyletter** in the **STEP Template Content** panel in InDesign.
2. Drag the Keyletter 'attribute' onto the page.
3. Other attributes will be added into the text frame as per standard product template procedure.

For more information on building standard product templates, see the **Product Templates** section of the **STEP Publisher** documentation.

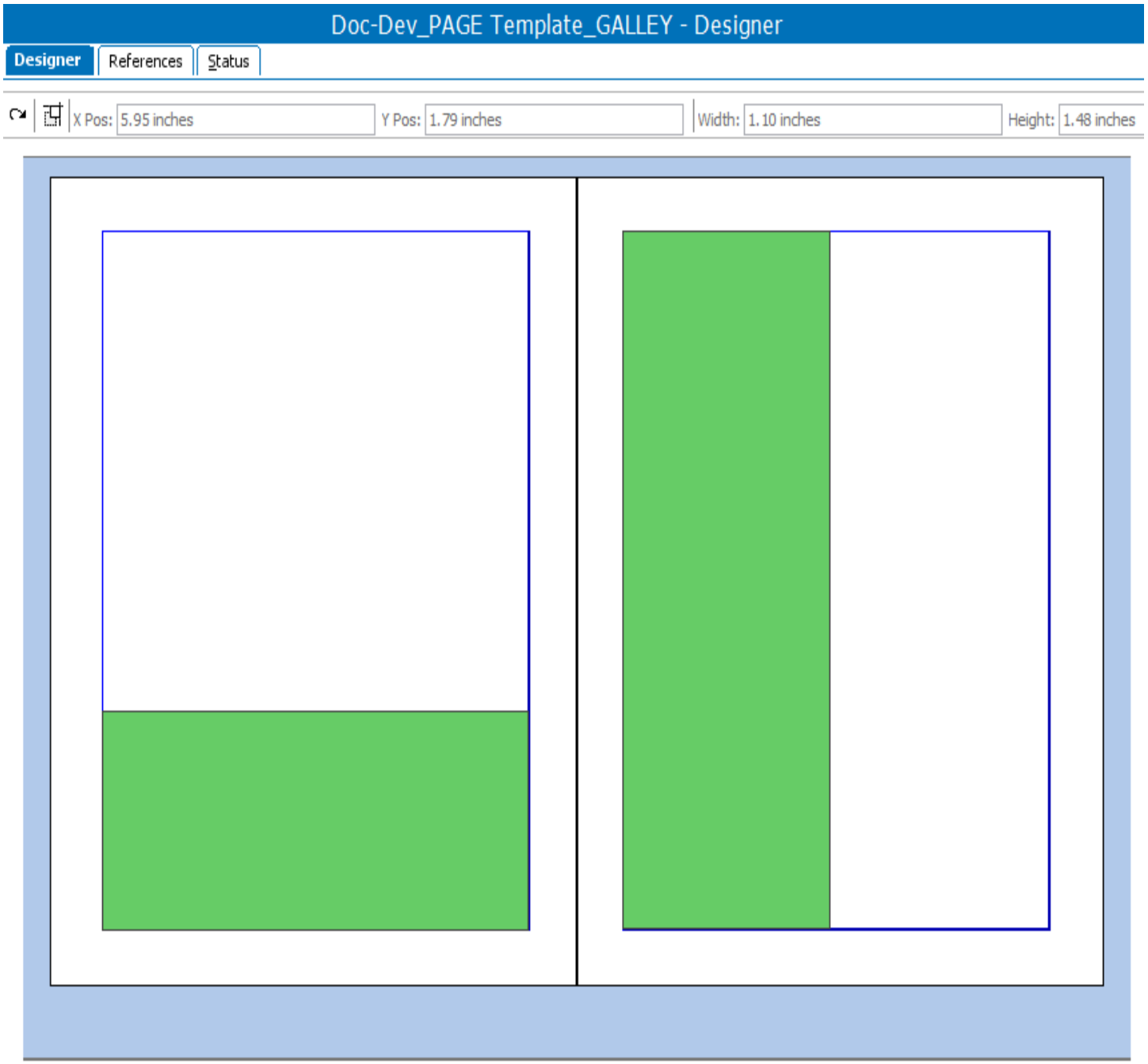


Working With Galley Page Templates in STEP

The following screenshot shows what a Galley page template looks like on the page template **Designer** tab. The green frames indicate **Galley Text** frames. Note that no image frames display on the page.

Unlike the frames contained in standard page templates created in the workbench, green Galley text frames cannot be manipulated in the page template designer.

This section will explain the special handling involved in linking product objects to planned pages that use a Galley page template to drive the layout.

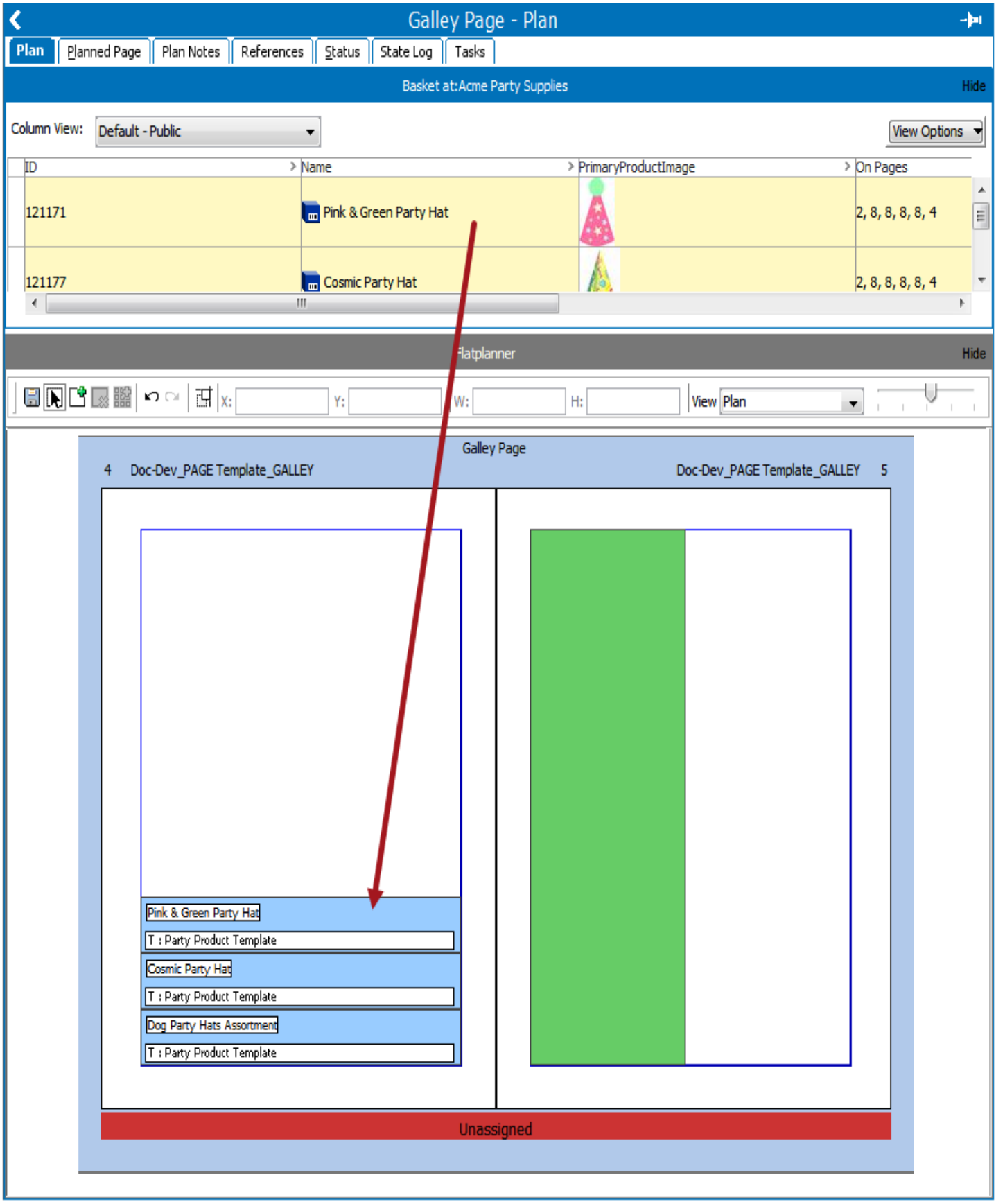


Linking Products to Galley Text Frames

Unlike standard Flatplanner planned pages, there is not a 1-to-1 relationship between product objects and Flatplanner frames when using Galley layouts. All products that should display on a page are linked into a single green Galley text frame. In other words, there is a 1-to-many relationship between Galley frames and product objects.

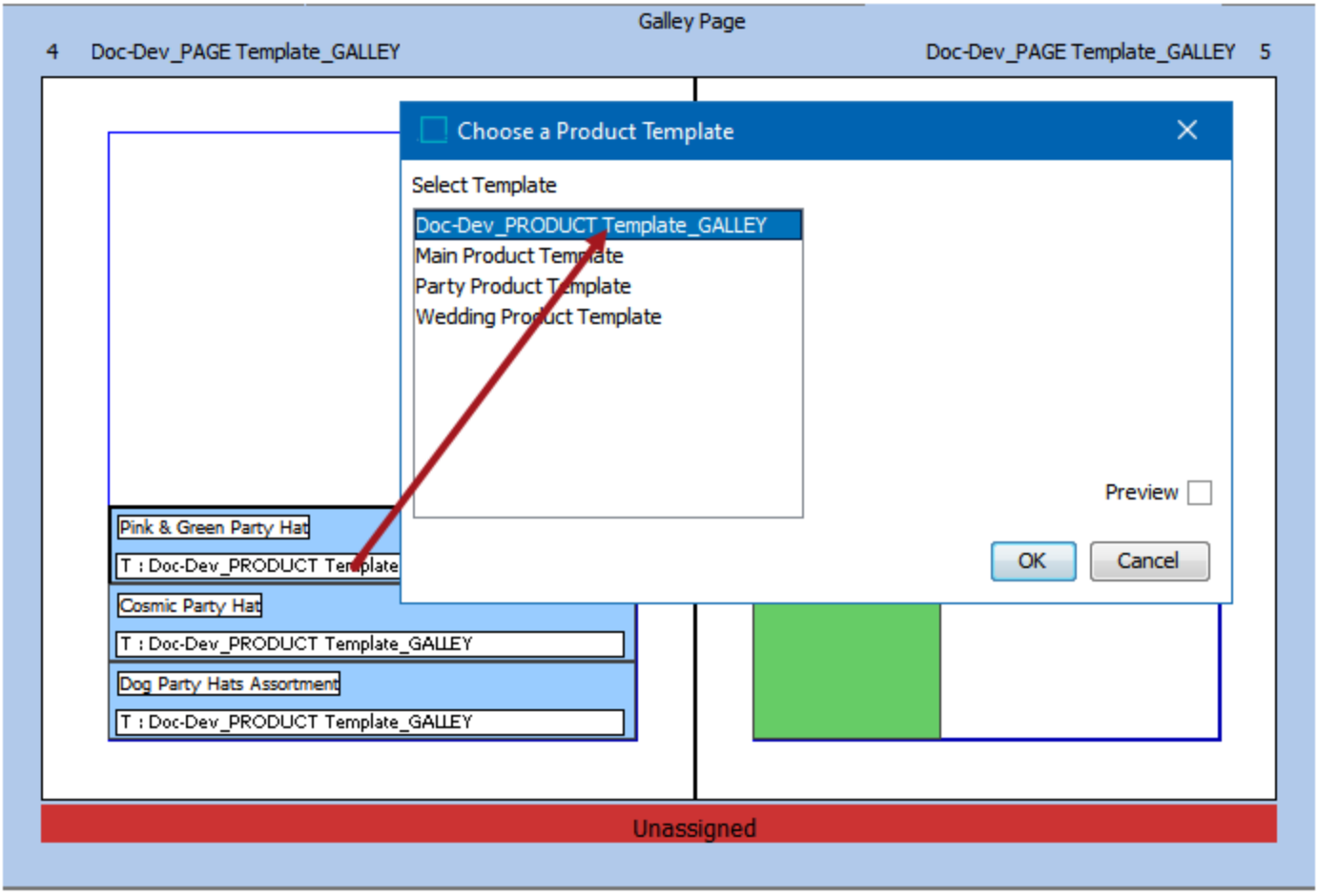
In the **Plan** view, product objects should be dragged into Galley frames in the order that they should display on the planned page. In the example below, there are three products inside a single frame. The product on the top will be the first product, i.e., Galley key letter A. The second product will be Galley key letter B, and so on.

Note: Ordering product objects in Galley frames may involve some removal and re-adding, as the products cannot be rearranged once placed into the frame. One way to ensure that your product objects display in the correct order is to arrange them in the Flatplanner basket first, then multi-select them and drag them onto the frame together.

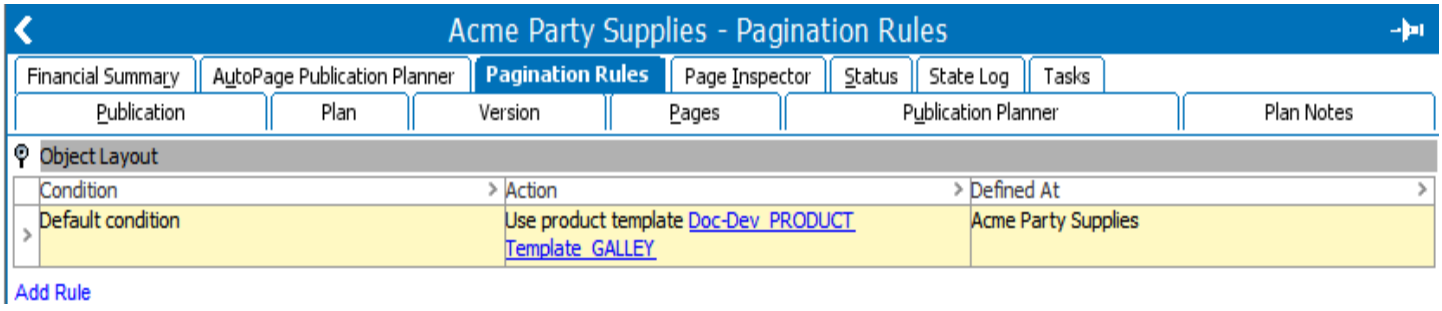

Galley Page - Plan
Plan
Planned Page
Plan Notes
References
Status
State Log
Tasks
Basket at:Acme Party Supplies
Hide
Column View:
Default - Public
View Options
ID
Name
PrimaryProductImage
On Pages
121171
Pink & Green Party Hat
2, 8, 8, 8, 8, 4
121177
Cosmic Party Hat
2, 8, 8, 8, 8, 4
Flatplanner
Hide
X:
Y:
W:
H:
View
Plan
Galley Page
4
Doc-Dev_PAGE Template_GALLEY
Doc-Dev_PAGE Template_GALLEY
5
Pink & Green Party Hat
T : Party Product Template
Cosmic Party Hat
T : Party Product Template
Dog Party Hats Assortment
T : Party Product Template
Unassigned

Assigning Galley Product Templates to Products in a Galley Frame

1. Right-click in a white area on the planned page and select View > **Show Product Templates**.
2. Left-click in the white product template box on the frame and choose the Galley product template that you would like to use in the **Choose a Product Template** dialog.



Galley product templates may also be pre-assigned to product objects through Flatplanner pagination rules. The following screenshot shows an example of a rule that has been set to use a Galley product template as the default layout. For more information on Flatplanner pagination rules, see the **Flatplanner Pagination Rules** section of this guide.



Mounting the Galley Page

Galley pages are mounted like any other Flatplanner page in InDesign. For more information, see **Finalizing Pages in InDesign** in the **Flatplanner** documentation.

Advanced Galley Page Template Frame Options

Text frames containing attribute references, as well as additional image frames containing product or asset references, may be grouped together with the image frame and Galley key letter frame. In addition, any frame appearing on a Galley page template may be styled with background shading, borders, and so forth. This allows more flexibility in the layout of Galley pages, since Galley *product* templates may only contain text. See the **Galley Product Templates** documentation for Galley product template configuration instructions.

The following screenshots show a 'before' and 'after' of a more advanced setup. The first screenshot shows the stylized page template, and the second screenshot shows the mounted page in InDesign.

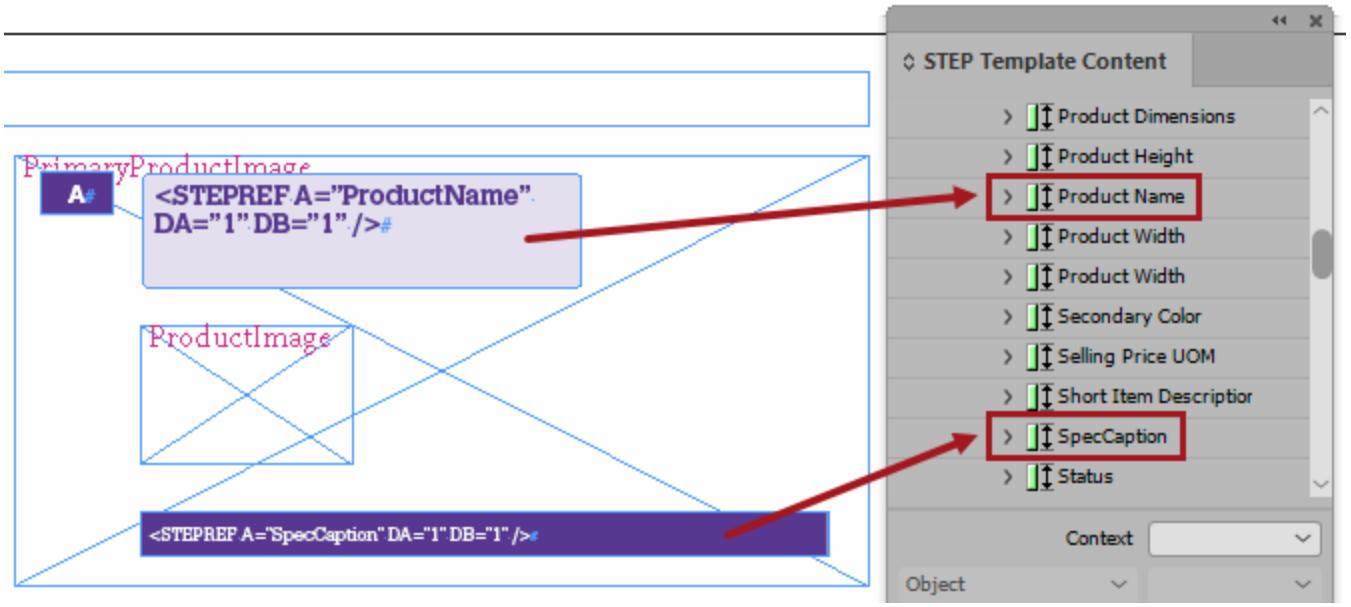
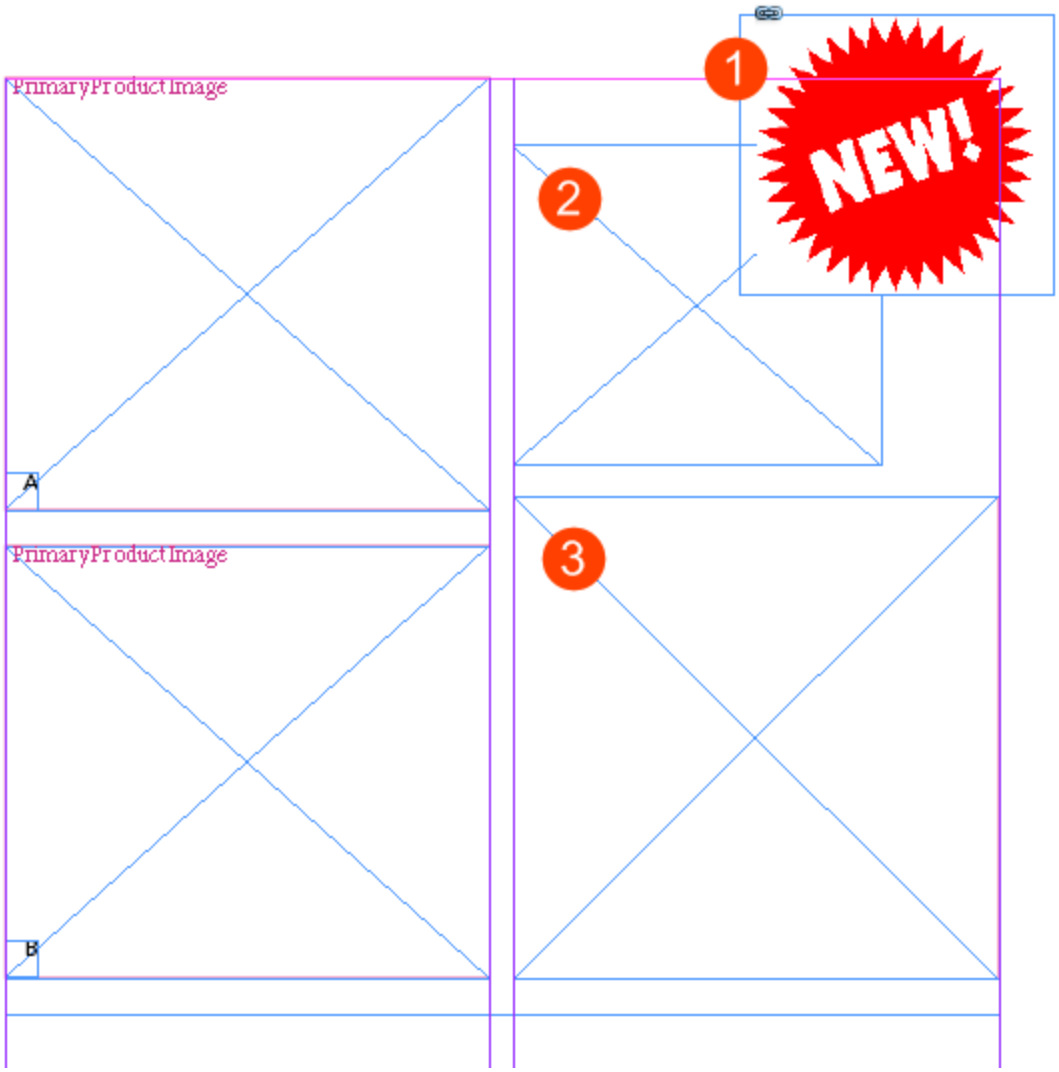


Image and Product Frames Without Key Letters

In addition to the frame types required for Galley layouts, other frame types may be 'nested' within the page to allow expanded layout flexibility.

The following Galley template example shows three additional frame types:

1. Static
2. Image (no Key Letter)
3. Product



Static Frames

Static Frames are used for content that should never be manipulated in the workbench Plan view. They typically contain logos or brand images.

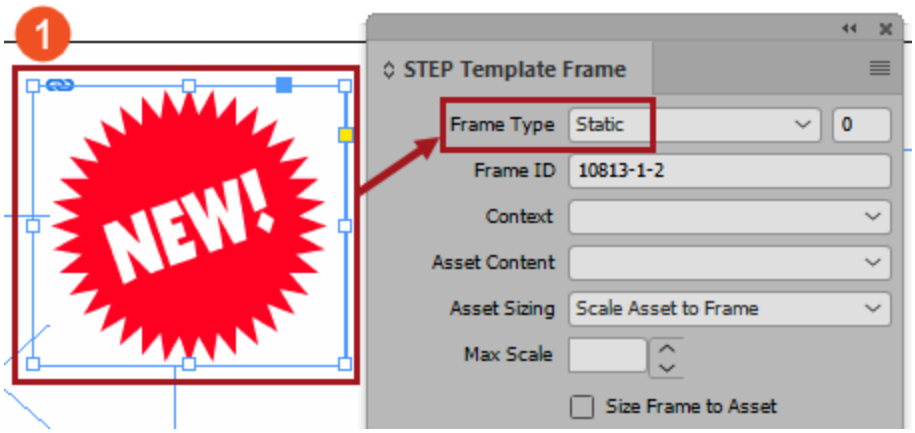
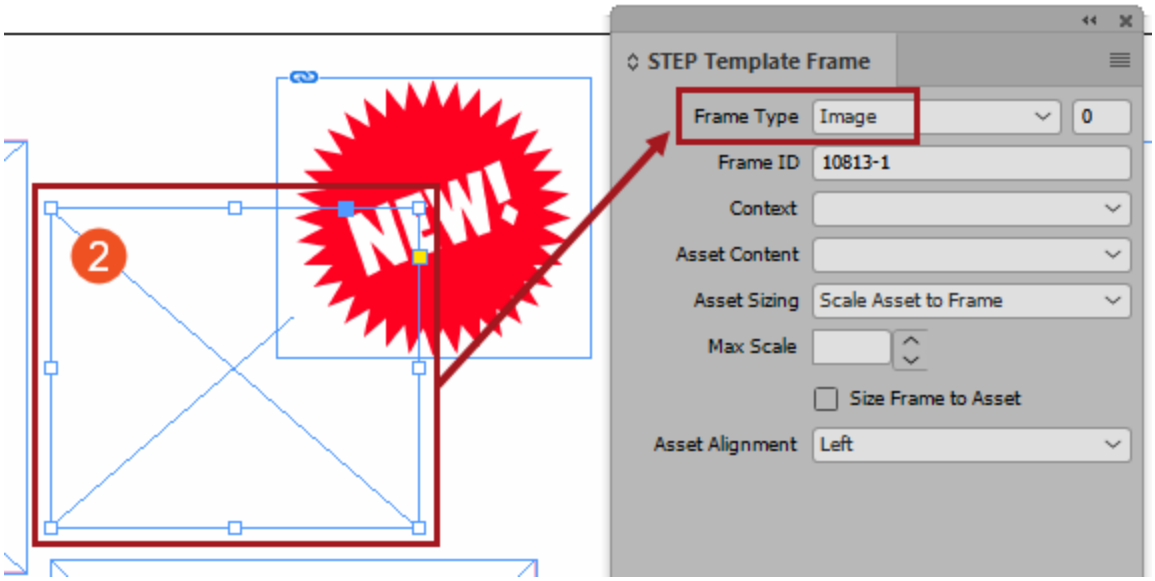


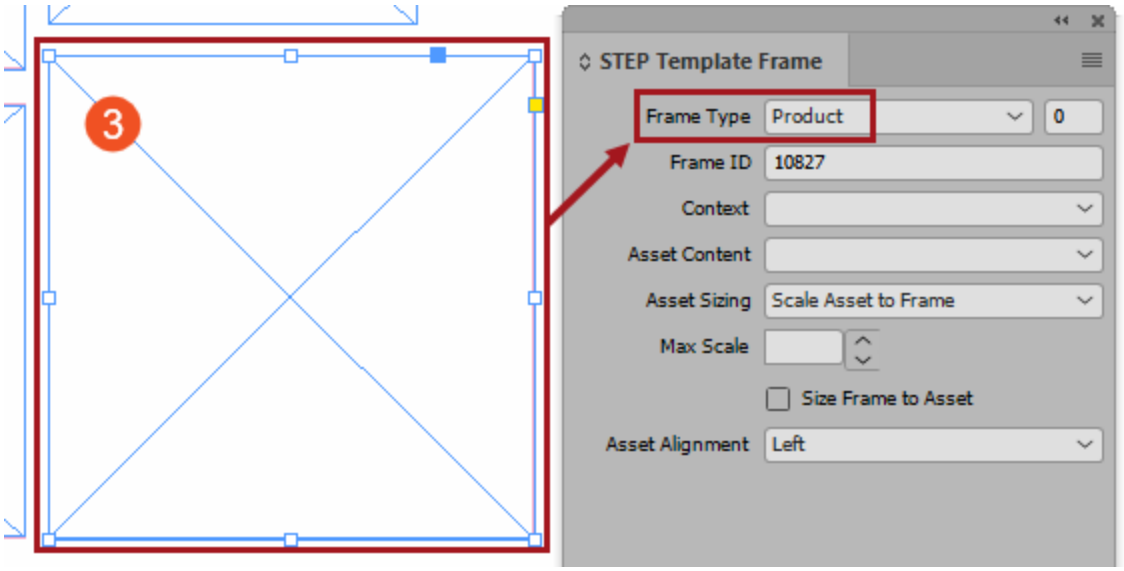
Image Frames

Image Frames are not connected to Key Letters and are intended to contain image assets only.



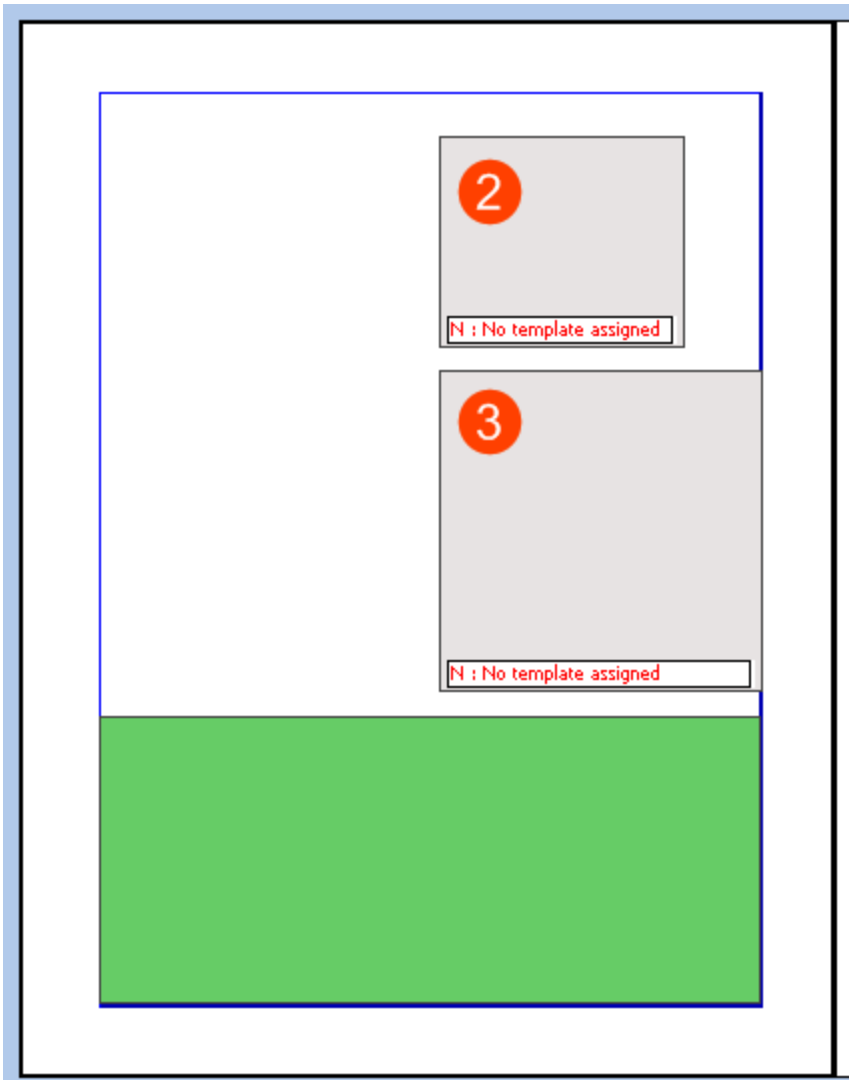
Product Frames

Product frames allow 'nesting' of content on a page, allowing a different, non-Galley product template to be linked to the frame.

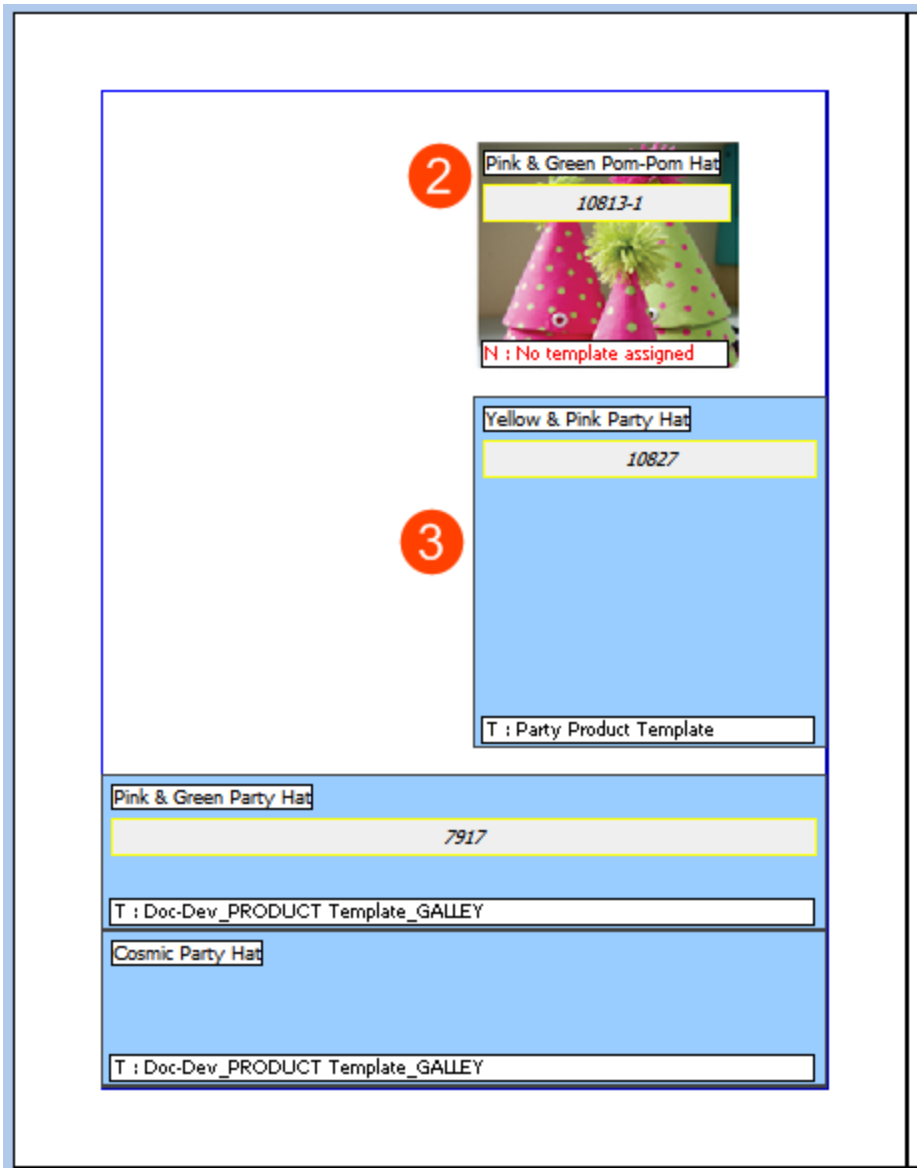


Working With Optional Galley Page Template Frame Types in the Workbench

To prevent manipulation by users in the workbench, **Static Frames** do not appear in the Plan view. Numbers 2 and 3 on the below screenshot correspond to the product and image frames from the previous example.



The following screenshot shows the Plan with an **image** object linked to the **Image Frame** and a **product** object linked to the **Product Frame**. Note that the product template applied to the product frame (number 3) is a non-Galley template.



The document described in this example will appear as follows when mounted in InDesign:

Party Hats NEW
Acme Party Supplies
1
NEW!
2
A
Yellow & Pink Party Hat
3
B
Suitable for all ages
A. Pink & Green Party Hat
Celebrate any occasion with this pink and green party hat!
Suitable for all ages.
Exclusive
$2.99 / Ea.
B. Cosmic Party Hat New!
Cosmic hat for a party that's out of this world!
Suitable for all ages.
$3.99 / Ea.
4
Acme Party Supplies - Since 1955

Flatplanner Baskets

Flatplanner **baskets** are a way to store and organize products and images (and less commonly, classifications) that will be linked to frames on Flatplanner planned pages throughout a publication. Baskets can be accessed at the publication, section, subsection, and spread level of publications.

The most common use for Flatplanner baskets is the ability to view the assortment of products that have been selected for your spread, section, subsection, or publication, then drag these objects from the basket onto the frames on your Flatplanner planned pages.

Baskets are optional, as objects may be linked directly to planned page frames by a number of different methods:

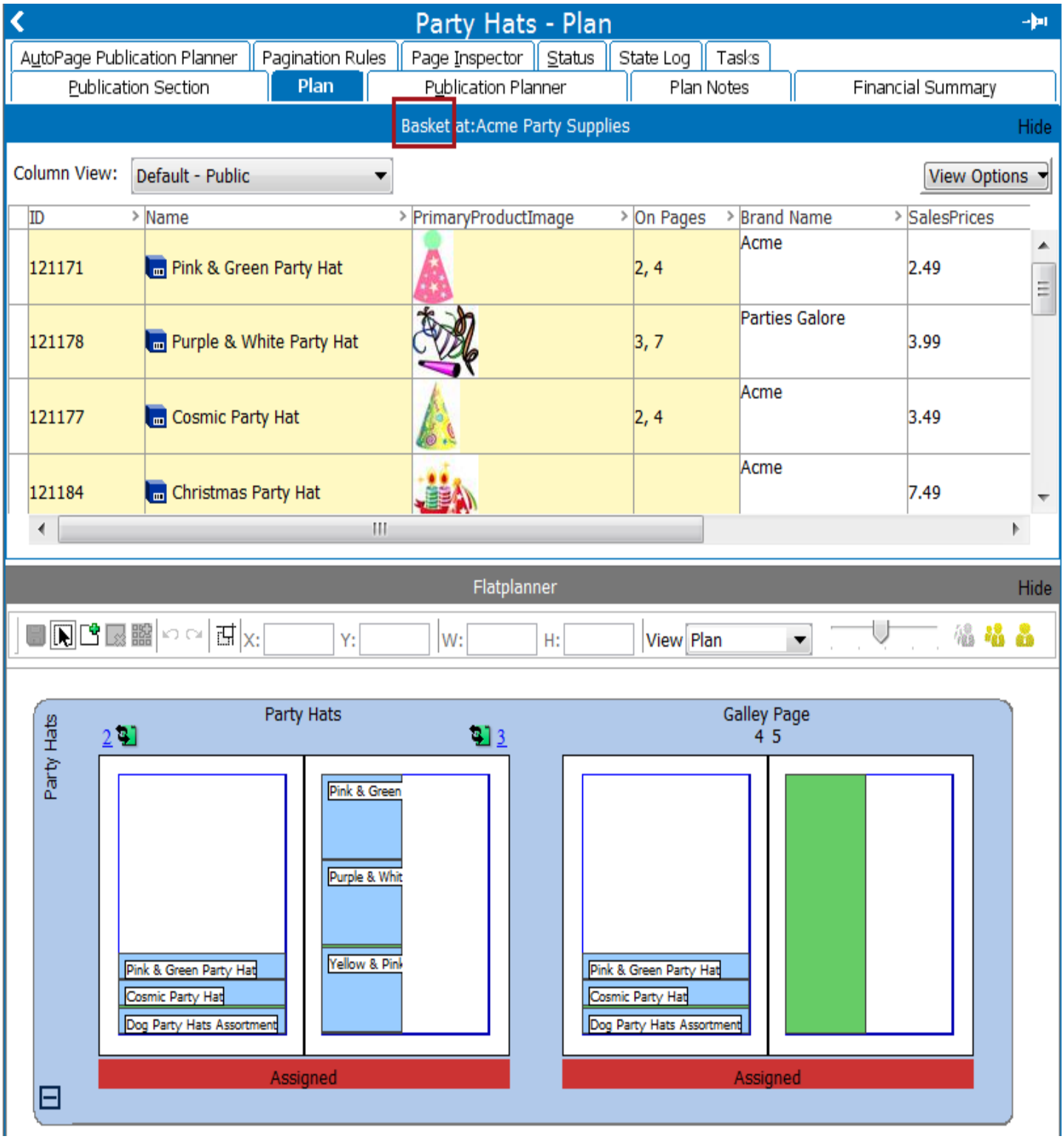
- Directly from the Tree
- From a listing of search results
- From the contents of a collection
- Through an import (Publication Excel, Flatplanner Excel, or STEPXML)

However, Flatplanner baskets are a convenient visual tool for users who plan pages in STEP, since basket views can be configured to display image thumbnails, attribute values, commercial data (such as pricing), and other useful information about the product selection. Filtering and sorting features are also available to ensure that the right products are placed in the correct positions on the page. For information on configuring the columns that display in the basket, see the **Editing Views** topic in the **Views** section of this guide.

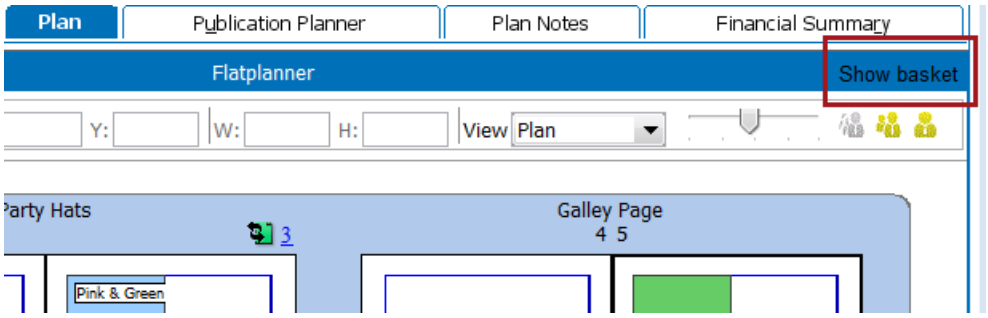
Objects linked to baskets at higher levels in the publication hierarchy are inherited by the baskets of child sections and spreads, following the same manner of **inheritance** as that of other hierarchies in STEP; for example, the way that attributes and references that are linked to higher levels in the product hierarchy are inherited by child products.

Viewing a Basket

Baskets are viewed from the **Plan** tab on publications, sections, subsections, and spreads.



- To open the basket, click **Show basket** in the upper right corner of the basket window.



- To hide the basket, click **Hide** in the upper right corner of the basket window (visible in the first screenshot in this topic).

Using a Collection with Flatplanner Baskets

Collections are sometimes used to gather products that should be linked into a basket. Each publication can include products from several collections. Two collection examples could be:

Collection	Criteria
Acme Pens Spring Catalog	Include products with Attribute 'Brand Name' = 'Acme'
Zeta Pens Spring Catalog	Include products with Attribute 'Brand Name' = 'Zeta'

For more information about working with Collections, see the **Collections** topic in the **Getting Started / User Guide** documentation.

Adding Objects Manually to Baskets

Products, assets, and classifications can be added to Flatplanner baskets through both manual and automated methods. The following instructions outline how to add objects to Flatplanner baskets manually: from the Tree, from search results, and from collections.

For all of the following methods, the relevant basket must be open (unhidden) and the **Plan** editor must be pinned to the window by clicking the thumb pin icon in the upper left corner .

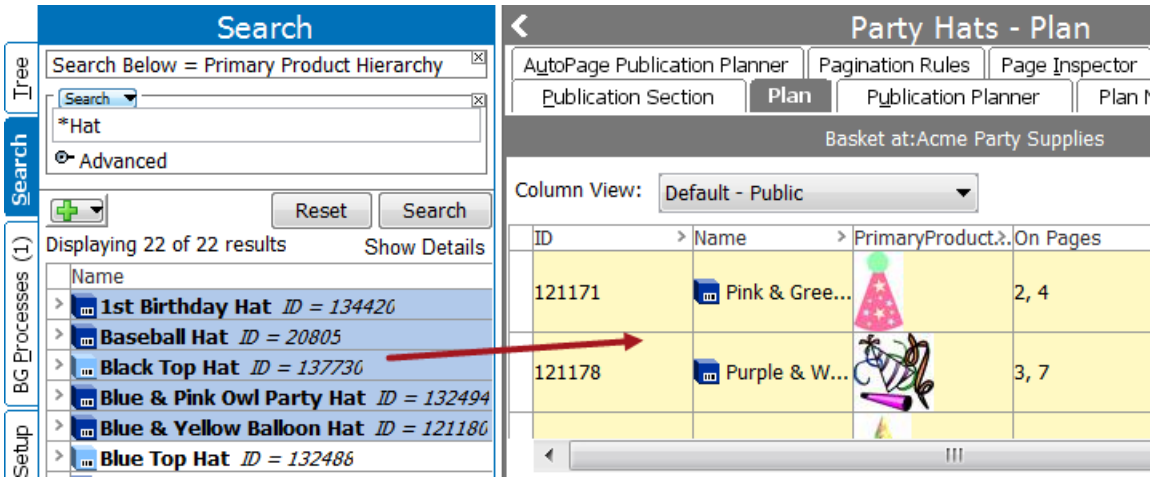
Add Objects From the Tree

Product, asset, and classification objects can be dragged from the Tree and dropped into baskets.

1. In the Tree, locate the relevant publication, and then navigate to the level of the publication that contains the basket to which you would like to add objects. This is typically a section or spread, but could also be at the top publication level.
2. Click the **Plan** tab.
3. Click **Show basket** to make the basket available.
4. Ensure that the editor is locked by clicking the thumb pin icon in the upper right corner of the Plan window.
5. In the Tree, navigate to the object(s) that you want in your basket.
6. Select one or more objects, then hold down the left mouse key and drag the object(s) into the basket. To select multiple objects, press Ctrl or Shift while making selections.

Add Objects from a Search Result

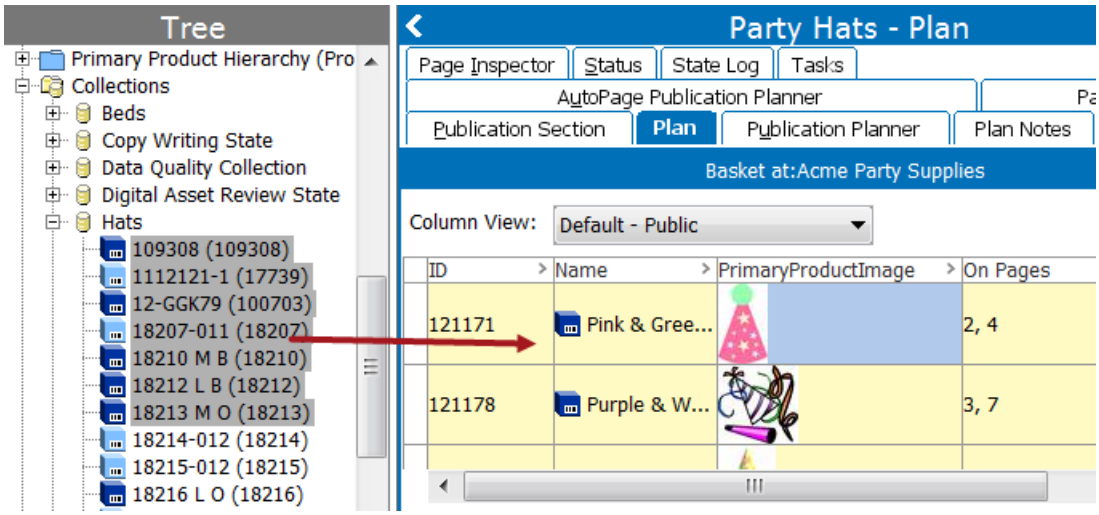
1. Follow steps 1-4 from the previous section to locate, open, and pin the relevant basket.
2. Click on the Search tab, configure your search criteria, and then click **Search**.
3. Select one or more objects, then hold down the left mouse key and drag the object(s) into the basket. To select multiple objects, press Ctrl or Shift while making selections.



For more information on how to conduct searches in the STEP Workbench, see the **Search** section of the **Getting Started / User Guide** documentation.

Add Objects from a Collection

1. Follow steps 1-4 from the 'To Add Objects From the Tree' section above to locate, open, and pin the relevant basket.
2. In the Tree, navigate to the relevant collection and expand it to view its contents.
3. Select one or more objects, then hold down the left mouse key and drag the object(s) into the basket. To select multiple objects, press Ctrl or Shift while making selections.



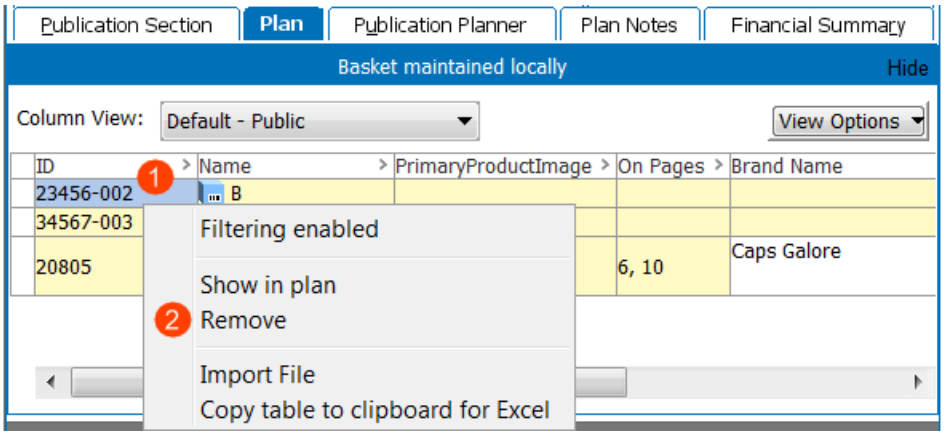
For more information on how to create and work with collections, see the **Collections** section of the **Getting Started / User Guide** documentation.

Removing Objects from Baskets

1. Select the row(s) containing the products that you would like to remove by clicking the cells in the **ID** column. Rows may be multi-selected by holding Shift or Ctrl while making selections.

> **Note: Note:** Cells in any column may be clicked to select rows, though using the ID column is the most logical, since it is the first column and also contains no hyperlinks.

2. Right-click and select Remove.



Importing Objects Into Baskets

Objects can be imported into Flatplanner baskets using the following file formats:

- CSV
- Plain text (.txt)
- Publication Excel
- STEPXML

The following sections outline the steps for each method. This topic assumes that you have already navigated to the relevant basket in your publication and have the basket open.

CSV

Two methods exist for importing objects to Flatplanner baskets using CSV files. The first is for loading a sheet containing objects that are all of the same 'super type'—product, asset, or classification. The second is for loading a sheet that contains an assortment of super types.

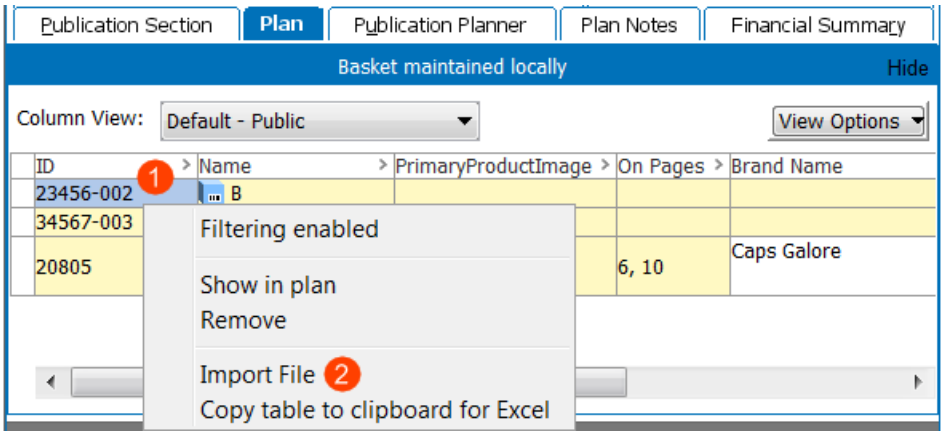
Objects of the Same Super Type

To load a CSV file composed of objects of the same super type, a one-column CSV file containing a list of object IDs is used.

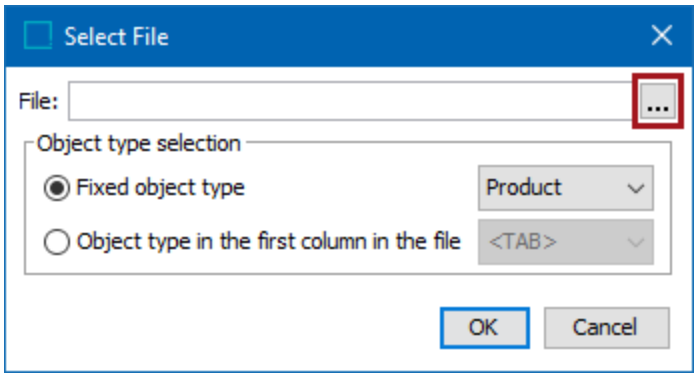
	A
1	20805
2	114509
3	181198
4	20803
5	179857
6	179858
7	134420
8	121177
9	121171
10	121192
11	138925

To load this file, follow these steps:

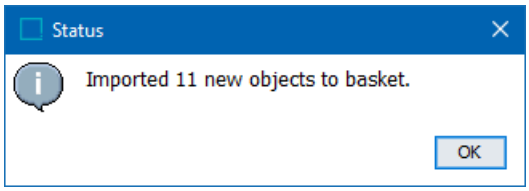
1. Right-click anywhere inside of the basket and select **Import File**.



2. In the **Select File** dialog, click the ellipsis button (...).



3. In the **Open** dialog, navigate to the relevant CSV file, then click **Open**.
4. In the 'Object Type selection' area of the **Select File** dialog, choose **Fixed object type**, then choose the appropriate super type from the dropdown list (Product, Classification, or Asset).
5. Click **OK**. A **Status** dialog displays.
6. If the load is successful, a message appears in the **Status** dialog box with the number of new objects that were loaded. If the load was unsuccessful, an error message appears instead. (For example, an error may appear if the 'fixed object type' file contains different super types, or if the system cannot locate an object in the file.)



7. Click **OK** to close the Status dialog. The objects from the imported file are displayed in the basket.

Objects of Different Super Types

To load a CSV file composed of objects of different super types, a two-column CSV file is used that contains super type identifiers in the first column and a list of corresponding object IDs in the second column. The first column identifies the objects' super type with a value of 'product,' 'asset,' or 'classification.'

	A	B
1	product	134420
2	product	20805
3	product	121177
8	product	121192
9	product	179857
10	product	179858
11	product	138925
12	asset	107625
13	classification	8735

To load this file, follow these steps:

1. Follow steps 1-3 from the previous section on uploading single-column CSV files.
2. In the 'Object Type selection' area of the **Select File** dialog, choose **Object type in the first column in the file**, then select the appropriate delimiter from the dropdown list. Available delimiters in the 'Object type in the first column in the file' dropdown list are <TAB>, <SPACE>, comma, semicolon, and pipe.
3. Click **OK**. A **Status** dialog displays.
4. If the load is successful, a message appears in the **Status** dialog box with the number of new objects that were loaded. If the load was unsuccessful, an error message will appear instead. (For example, an error may appear if no super types are listed in the first column, or if the system cannot locate an object in the file.)
5. Click **OK** to close the Status dialog. The objects from the imported file are displayed in the basket.

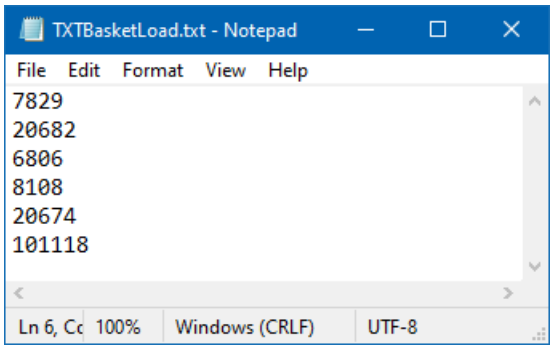
Plain text (.txt)

The steps for loading plain text files to baskets are nearly identical to those of uploading CSV files.

> **Note:** Imported text files must be true plain text. The import will not work with document types that contain rich text elements (for example, Microsoft Word documents).

Objects of the Same Super Type

To load a list of objects of the same super type (for example, an assortment of products), a plain text file containing a list of object IDs is used.

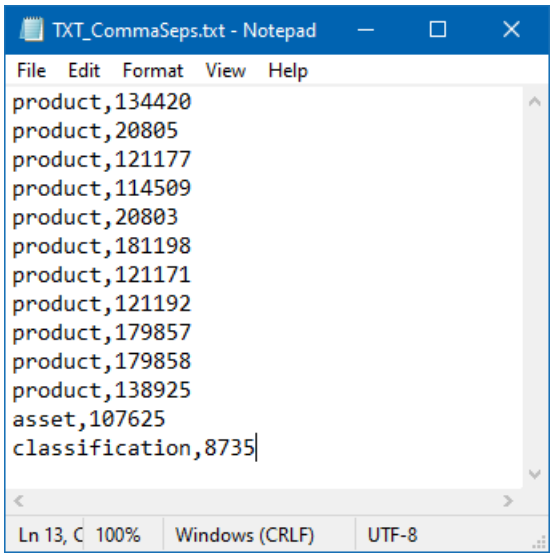


To load this file:

1. Follow steps 1-3 from the previous section on uploading single-column CSV files, except you will open a .txt file instead of a CSV file in step 3.
2. In the 'Object Type selection' area of the Select File dialog, choose **Fixed object type**, then click **OK**.
3. The **Status** dialog displays with the number of new objects that were loaded to the basket. (If the load was unsuccessful, an error message appears.)
4. Click **OK** to close the Status dialog. The objects from the imported file are displayed in the basket.

Objects of Different Super Types

To load a list of objects of different super types, a plain text file containing a list of super types and object IDs is used. The super type and ID are separated by a delimiter (for example, a tab or comma).



To load this file:

1. Follow steps 1-3 from the previous section on uploading single-column CSV files, except you will open a .txt file instead of a CSV file in step 3.
2. In the 'Object Type selection' area of the Select File dialog, choose **Object type in the first column in the file**, then select the relevant delimiter from the dropdown list and click **OK**.

3. The **Status** dialog displays with the number of new objects that were loaded to the basket. (If the load was unsuccessful, an error message appears.)
4. Click **OK** to close the Status dialog. The objects from the imported file are displayed in the basket.

Publication Excel

A Publication Excel sheet may also be used to load objects into the baskets of an existing publication. The sheet needs the following columns, at minimum, to successfully import objects: PublicationID, SectionID, BasketObjectID, and BasketObjectType.

	A	B	C	D
1	PublicationID	SectionID	BasketObjectID	BasketObjectType
2	110642			
3		124278		
4			109308	Product
5			17739	Product
6			18212	Product
7			18213	Product
8			Tire Kit12	Asset
9			Icons	Classification
10		110016		
11			20805	Product
12			134420	Product
13			121177	Product
14			121171	Product
15			121192	Product
16			138925	Product

To load the file, right-click on a publication group and select **Import Publication...**. Alternately, you may select File > Import > Data. The ensuing steps will be the same as those for uploading any Publication Excel document.

For complete instructions on loading Publication Excel files, as well as additional information about how to use them (for example, how to create new publications), see the **Importing Flatplanner Publications in Excel** section of the **Flatplanner** documentation and the **Importing a Publication Excel Sheet** section of the **STEP Publisher** documentation.

STEPXML

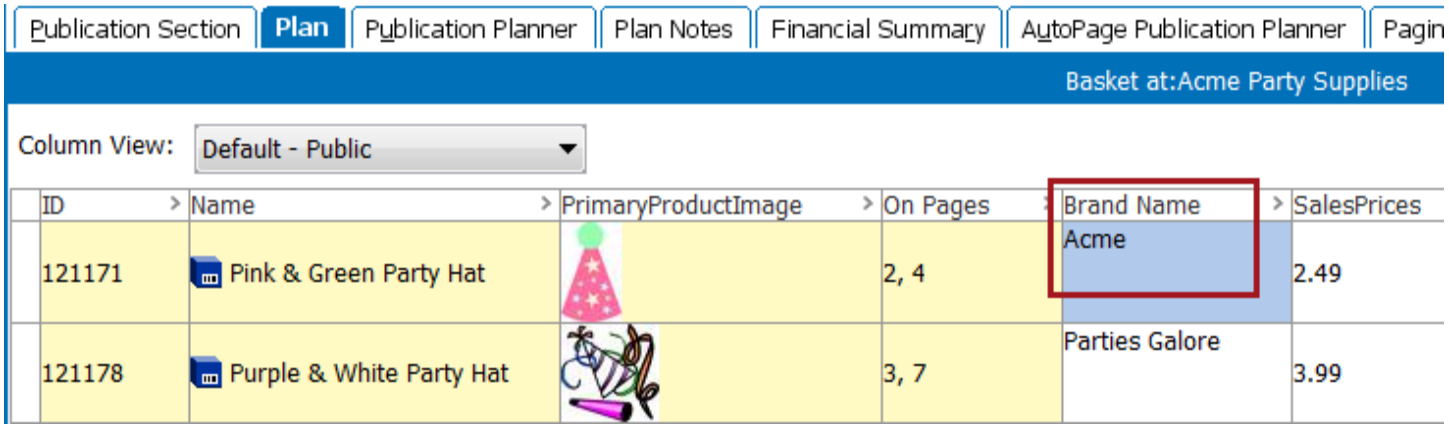
Typically, users will not manually create a STEPXML file for the sole purpose of importing objects into Flatplanner baskets. STEPXML files are most commonly used for the export / import of entire publications. However, objects can be loaded to baskets in pre-existing publications through a STEPXML import as long as the IDs for the existing publication (and sections, if section-level baskets are being loaded), are present in the file.

For a STEPXML example, see the online version of this topic.

For more information on importing STEPXML files for Flatplanner publications, see the **Exporting and Importing Flatplanner Publications in STEPXML** topic.

Editing Data in Baskets

It is possible to edit attribute values and commercial data directly in a basket. Attributes are only editable if the attributes are valid for the product. Commercial data is only editable if the relevant commercial list is valid for the publication and has been mapped to the publication version that you are working in. As with editing values in any other location in the workbench, you must have the appropriate user permissions in order to edit values in the basket.



To edit data in a basket:

1. With your basket open, click the field in which you want to add or change the value. In the above screenshot, the value cell for the attribute Brand Name has been highlighted.
2. Enter the new value.
3. Click outside of the field. The value is saved, and the value is also saved back to STEP.

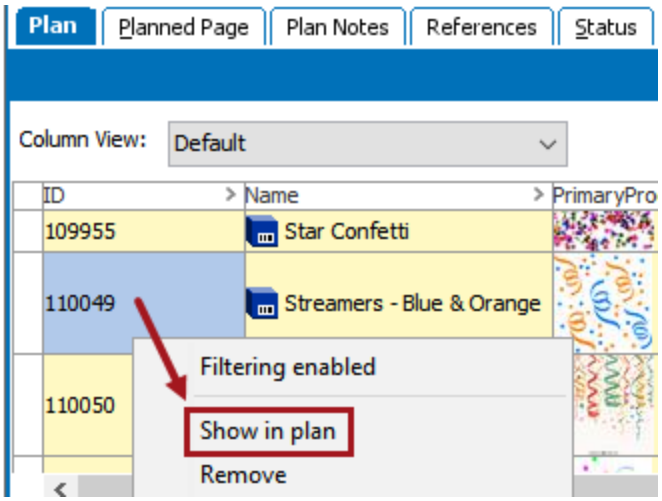
Navigational Options in Baskets

Navigational options are available in the basket that allow objects to be quickly located either in the Flatplan or in the Tree.

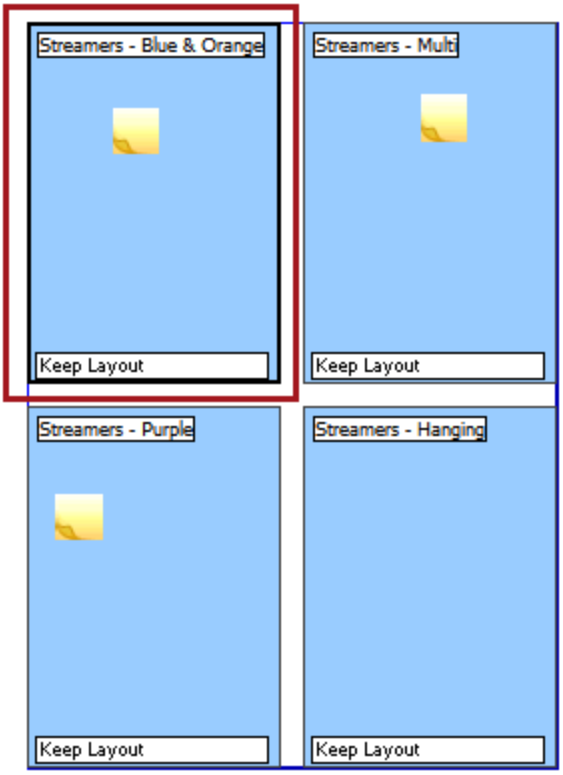
Show in Plan

Use the Show in plan option to quickly locate an object on a planned page.

1. Select an object in the basket, then right-click and choose **Show in plan**.



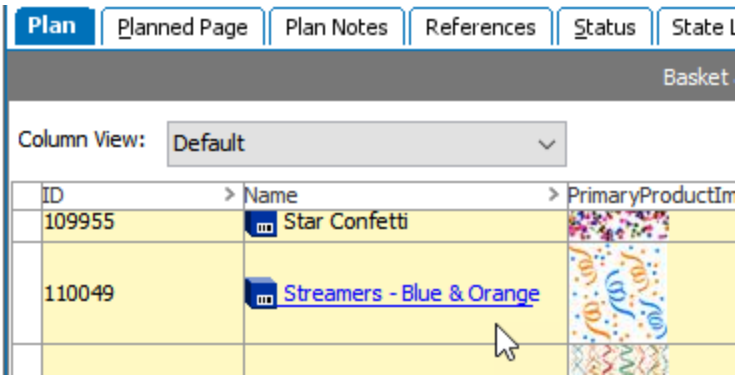
2. The Flatplanner frame to which the object is linked is immediately located and highlighted with a thick black border.



Note: If viewing multiple plans from the publication or section level, if the same object is linked to frames on multiple pages, only the first location will be highlighted.

Locate an Object in the Tree

To locate an object in the Tree from the basket, hover your cursor over the **Name** of the object until it turns into a hyperlink. Then, click the link to be taken directly to the object in the Tree.



Exporting Objects from Baskets

Listings of objects in Flatplanner baskets may be exported by the following methods:

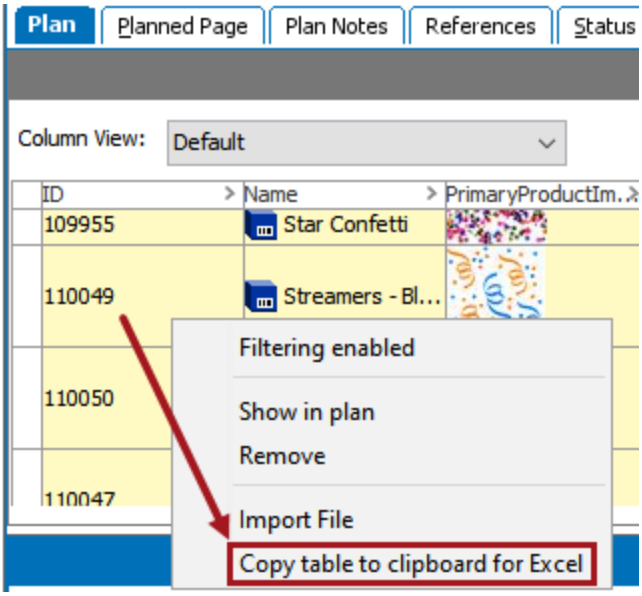
- Excel (copy to clipboard)
- Publication Excel
- STEPXML

This topic assumes that you have already navigated to the relevant basket in your publication and have the basket open.

Excel (Copy to Clipboard)

To copy a basket for use in an Excel file:

1. Right-click in any cell in the basket and select **Copy table to clipboard for Excel**.



2. Open a new Excel file and press Ctrl+V to paste the data into the sheet. Or, click **Paste** in the upper left-corner of the Home tab in Excel.

Publication Excel

See the **Exporting Flatplanner Publications in Excel** topic.

STEPXML

See the **Exporting and Importing Flatplanner Publications in STEPXML** topic.

Working with Frames on Flatplanner Pages

The methods and tools for working with frames on Flatplanner planned pages are nearly identical to those used when editing Flatplanner page templates. However, whereas edits made to frames on page templates are global and affect all pages using that template, the changes made to Flatplanner planned pages are local and intended to override the frames and frame settings inherited from the page template.

This topic describes how to work with frames and pages on Flatplanner planned pages, including how to add, remove, reorder, and resize frames, as well as how to zoom in and out of pages and copy and paste pages.

Considerations

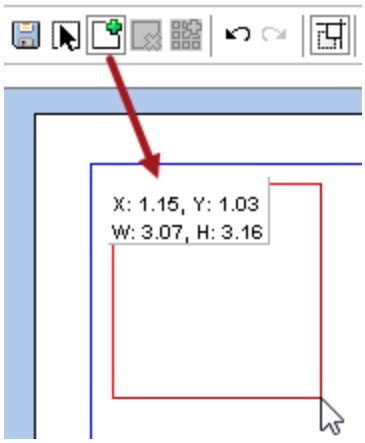
- Designer actions taken on planned pages are not automatically saved. Click the save icon frequently to ensure that changes are not lost.
- Flatplans themselves are not context specific. Any changes made will apply across all contexts. However, data within them can be context specific.

Add Frames

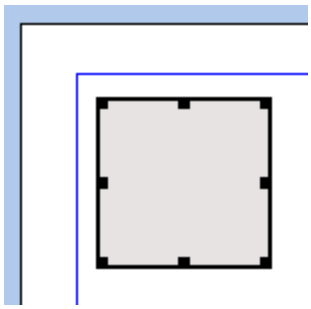
The following instructions explain how to add frames on an individual basis and how to add multiple frames at once.

Add an Individual Frame

1. Select the **Add Frame** tool in the toolbar .
2. Drag an outline of the frame with the cursor while holding down the left mouse button. The X, Y, W, and H coordinates automatically calculate as you draw the frame.

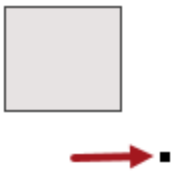


3. Release the mouse button to create the frame.



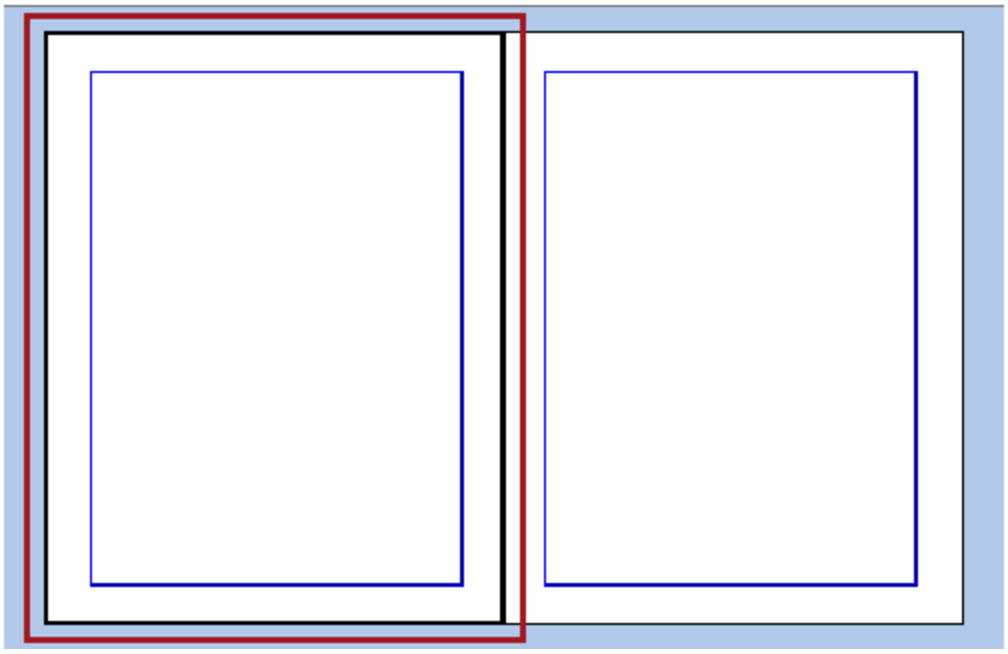
4. If the frame is at the desired size, click the **Select** tool in the toolbar, then click outside of the frame to remove the black drag handles from the frame.

> **Note:** If you don't click the **Select** tool before clicking out of the frame, the **Add Frame** tool will still be activated, and the system will think you want to create a new frame. If this happens, a tiny frame that looks like a black square will display when you click outside of the frame. You will either have to click **Undo** to remove it, or select it using the **Select** tool to resize it. See the 'Select Frames' subsection below for information on how to select frames.

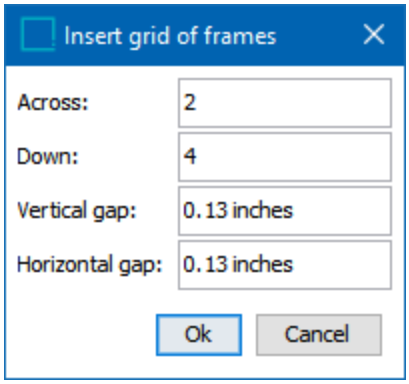


Add Multiple Frames in a Grid

1. To quickly create many frames in a grid, first click on a page. The selected page will be surrounded with a thick black border.



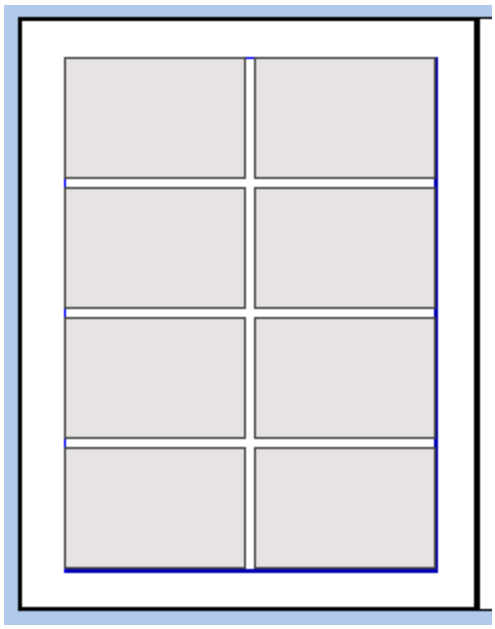
2. Click **Insert frames on a Grid** in the toolbar. The **Insert grid of frames** dialog displays.



- In the **Across** field, enter the number of *rows* of frames to insert.
- In the **Down** field, enter the number of *columns* of frames to insert.
- In the **Vertical Gap** field, enter the amount of distance that should appear between the rows of frames.
- In the **Horizontal Gap** field, enter the distance between the columns of frames.

Note: The STEP interface will only accept numbers with up to two decimal points. If a value such as 0.125 is entered, the system will round it up to .13. However, the gap will display correctly on the mounted page.

3. Click **OK** to insert the frame grid on the selected page.

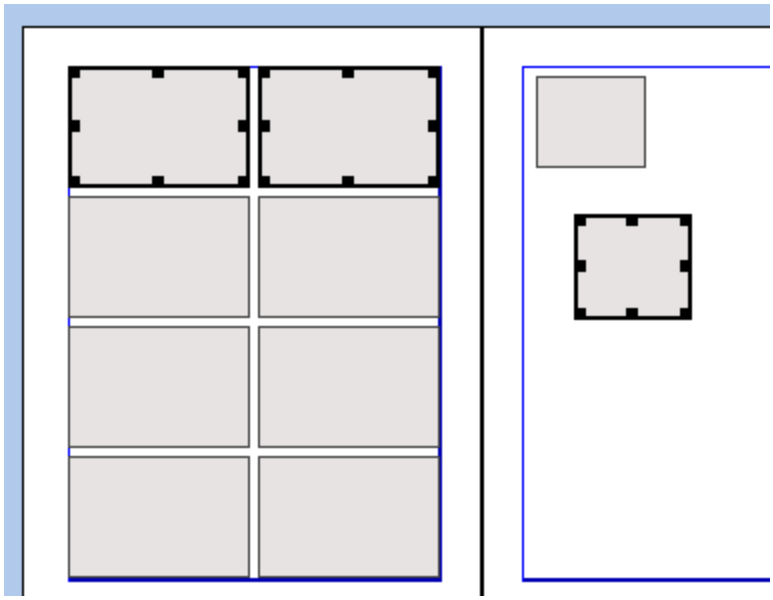


Select Frames

Two methods can be used to select frames: either **click** them with your mouse, or **drag** a bounding box around them while holding down the left button on your mouse.

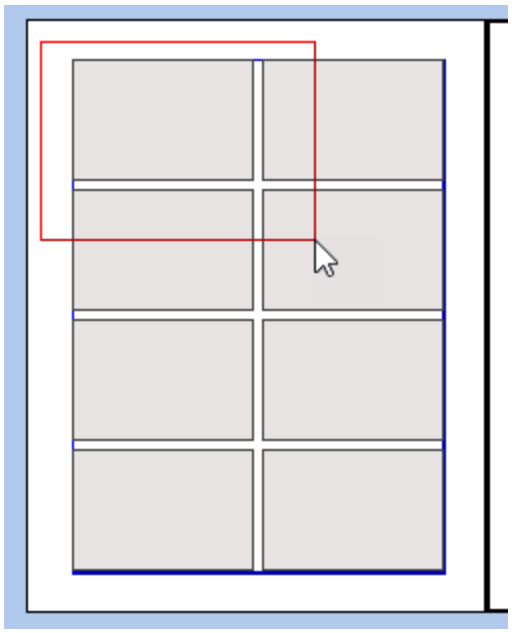
Mouse Click Method

1. To select a frame, click the **Select** tool in the toolbar, then click on a frame. A black border with drag handles (used for resizing) will display on the frame.
2. To select multiple frames, click the frames while holding down the Ctrl or Shift key.

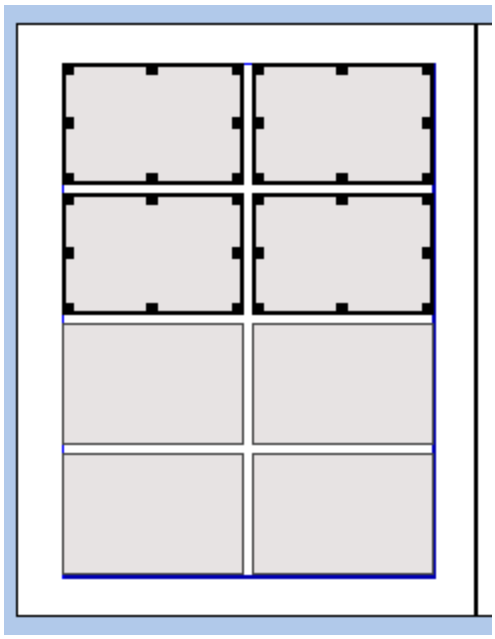


Mouse Drag Method

1. With the **Select** tool enabled, left-click *outside* of a frame on your page, then hold down the mouse button to 'draw' a red box around the frames that you want to select. The red box does not have to technically be around the frames; it will select any frames that it touches.

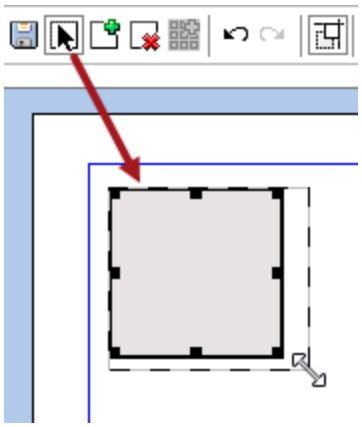


2. Release the mouse button. The frames will be selected.



Resize Frames

1. Click the **Select** tool in the toolbar, then select the frame.
2. Hold down the left bottom on your mouse, then drag the handles on the frame border until the frame is at the desired size.



3. Release the mouse button to finish resizing the frame.
4. Alternatively, enter a new value for one or more selected frames in the **Width** and **Height** fields in the toolbar. See the 'Change Frame Properties' subsection below for more information.

Delete Frames

To delete a frame, perform one of the following actions:

- Select a frame or frames with the **Select** tool, then click the **Delete frame** button in the toolbar.
- Select one or more frames, then press the **Delete key** on your keyboard.
- Right-click on a frame, then select **Delete frame** from the menu.

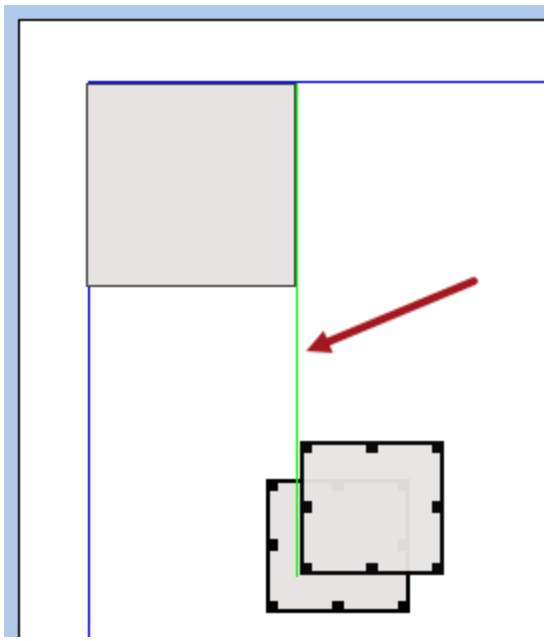
Move Frames

To move a frame, choose the **Select** tool in the toolbar, then click on the frame and hold down your left mouse button while dragging the frame to its new position. Release the mouse button to drop the frame.

You can also set the X and Y position of one or more selected frames by entering a new value in the **X Position** field and **Y Position** field.

Enable Snap Positioning

When moving frames on the page using drag and drop, it can be useful to enable Snap Positioning. This makes the moved frame snap to a position when you release the mouse button. This way you can easily place frames in the same X and Y positions on the page.



The snap positions are :

- Margin borders: Upper and right hand side border
- Frame borders: All borders

Note: Only the upper frame border and the left hand frame border of the frame that is being moved snaps.

Change the Layering Order of Overlapping Frames

Frames are placed on the page in a specific order relative to each other. Adding a new frame places that frame on top of other frames. This is only noticeable if frames overlap each other.

(An additional method is available for changing the order of overlapping frames by using the **Frame Properties** dialog; see the next subsection of this topic for more information.)

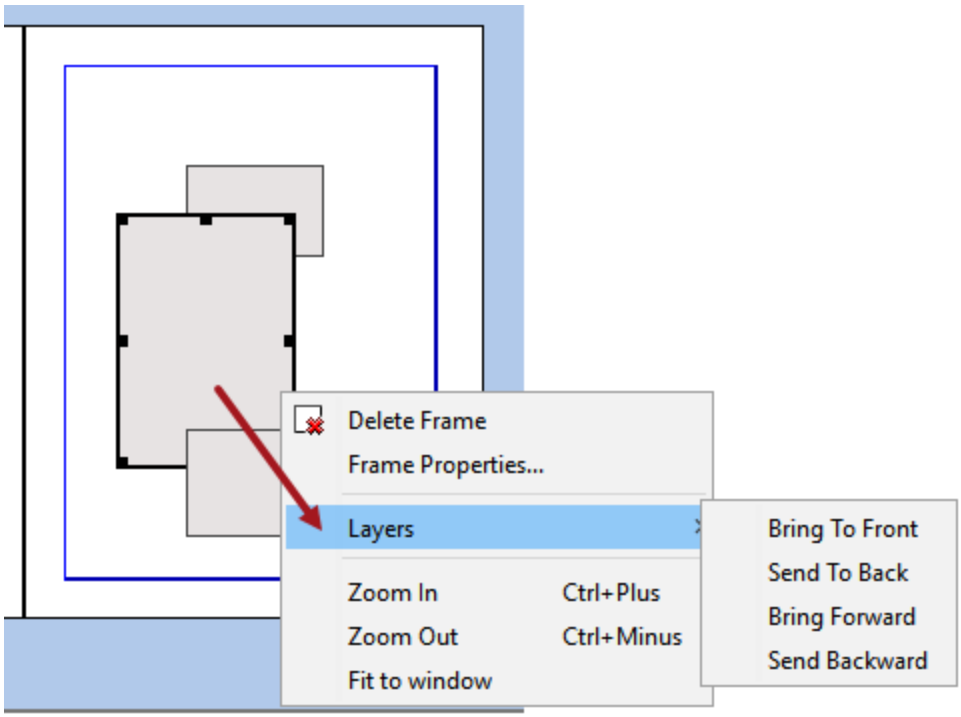
Note: Moving a frame from one page to another brings the frame layer to a front position.

1. To change the order of overlapping frames, right-click the frame, then select **Layers**.
2. Four options are available on the **Layers** menu, though some will be grayed out if they do not apply to the currently selected frame; e.g., 'Bring to Front' will be grayed out if the frame is already in the front.

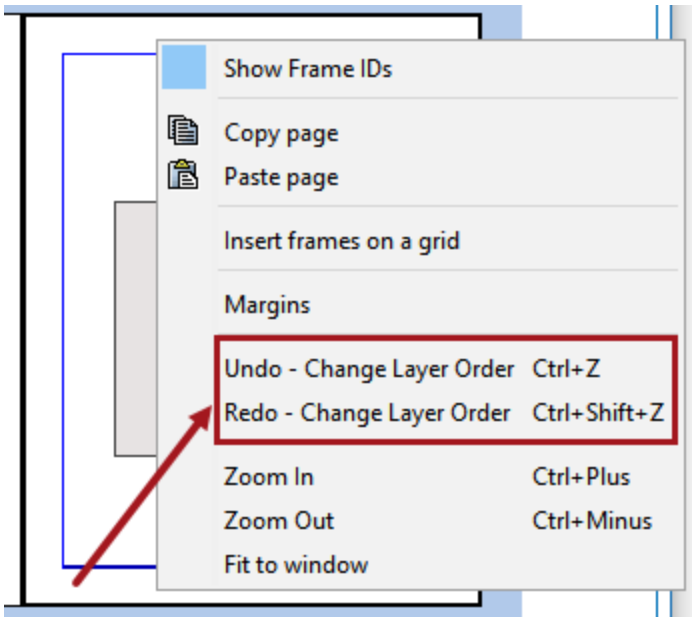
   In the below screenshot, all four options are activated since the frame is simultaneously in front of and behind another frame. (All four options are also activated if the frame overlaps no other frames at all, so it might be useful to change the order ahead of time if you already know that the frame should be in front or behind other frames.)

   - **Bring to Front**: Brings the selected frame to the front.
   - **Send To Back**: Sends the selected frame to the back.

- **Bring Forward**: Brings the selected frame one level forward.
- **Send Backward**: Sends the selected frame one level backward.



3. To **undo** or **redo** the last frame layering change, follow any of these methods:
   - Select a page, right-click, and select **Undo** or **Redo**.

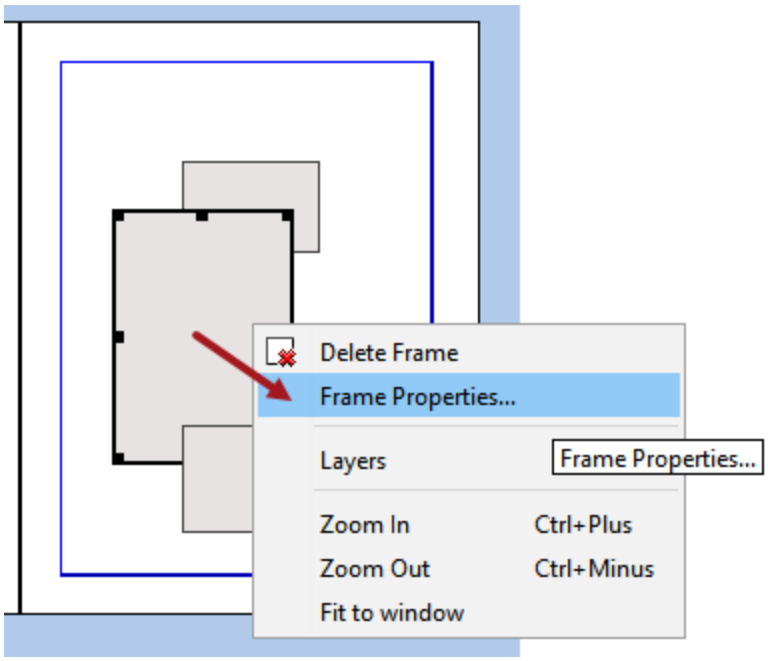


- Press **Ctrl+Z** to undo or **Ctrl+Shift+Z** to redo
- Click the **Undo** or **Redo** buttons in the Designer toolbar.

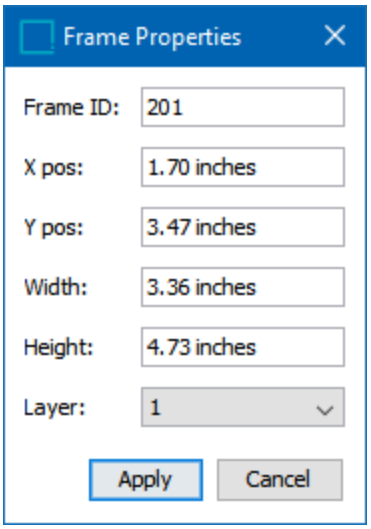
Change Frame Properties

To view and maintain dimensional and positioning details of a frame:

1. Select the frame, then right-click and select **Frame Properties**.



2. In the **Frame Properties** dialog that displays, the following options are available. All options are editable.
   - **Frame ID**: Displays the ID of the selected frame.
   - **X Position**: Displays the horizontal position of the selected frame.
   - **Y Position**: Displays the vertical position of the selected frame.
   - **Width**: Displays the width of the selected frame.
   - **Height**: Displays the height of the selected frame.
   - **Layer**: Displays the order of the frame order relative to other frames on the page. '0' means the frame is in the back, '1' means the frame is in the middle, and '2' means the frame is in the front.

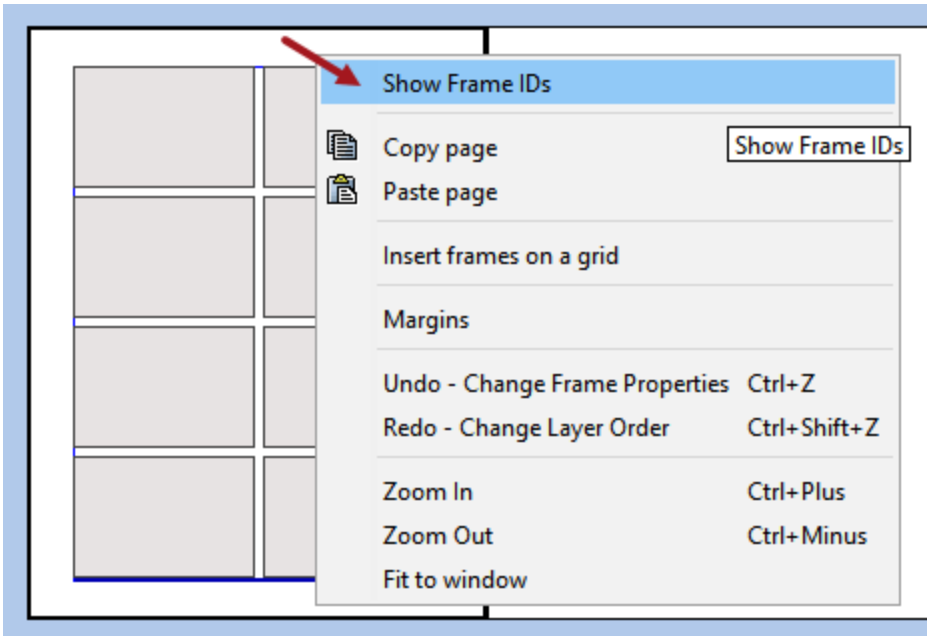


View Frame IDs

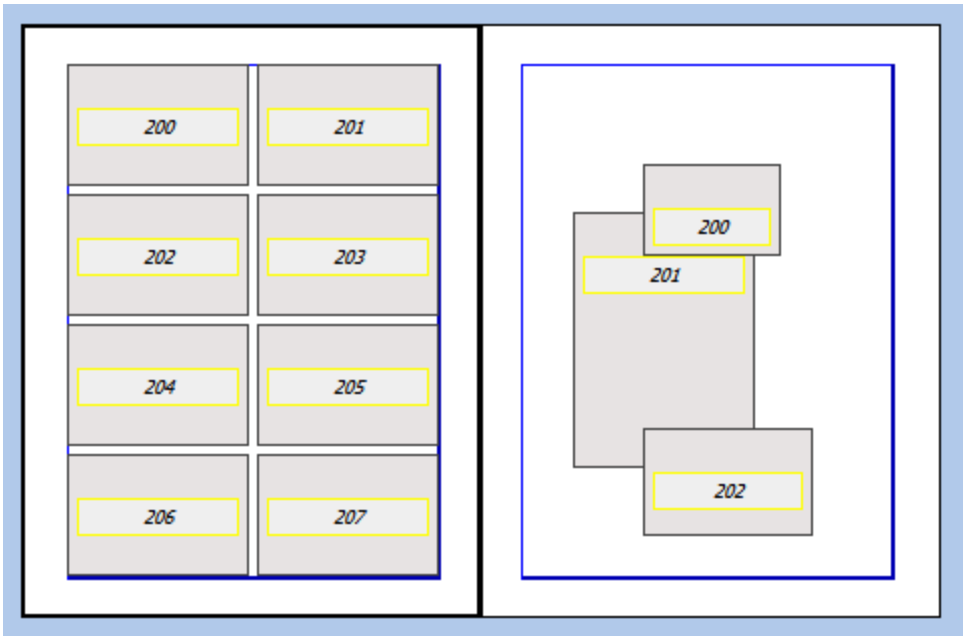
Each frame on a page has an ID, which is primarily used to identify which products and product templates are linked to each frame for the purpose of importing and exporting Flatplanner publications using Publication Excel files. Frame IDs inherit to the corresponding frames on planned pages, and can be overridden at the page level. For more information, see the **Exporting and Importing Flatplanner Publications** section of this guide.

Show or Hide Frame IDs

1. To show the ID of the frames on a page or spread (both left and right pages), right-click a page and select **Show Frame IDs**.



2. The frame IDs are shown for all frames on both pages in the spread. The IDs display in small boxes in the frames.

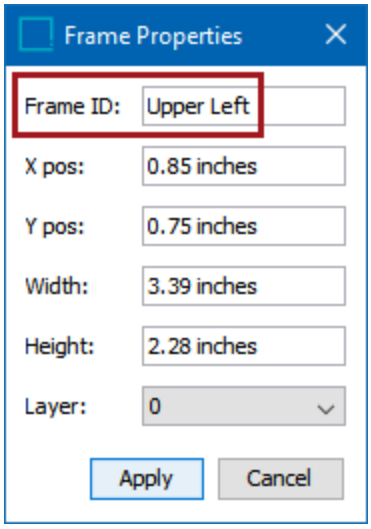


3. To hide the frames, right-click a page, then deselect **Show Frame IDs**.

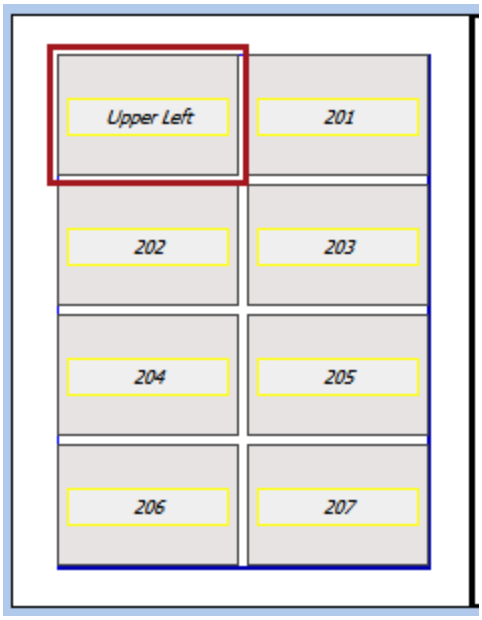
Change Frame IDs

By default, frame IDs start numbering on each page at 200. These IDs can be changed to make identification of the frames easier. For this example, the ID of the frame in the upper left corner of the left page (shown in the previous screenshot) will be changed from '200' to 'Upper Left.'

1. To change the ID of a frame, right-click the frame and select **Frame Properties**.
2. In the 'Frame Properties' dialog, type a new ID for the frame in the **Frame ID** field, then click **Apply**.

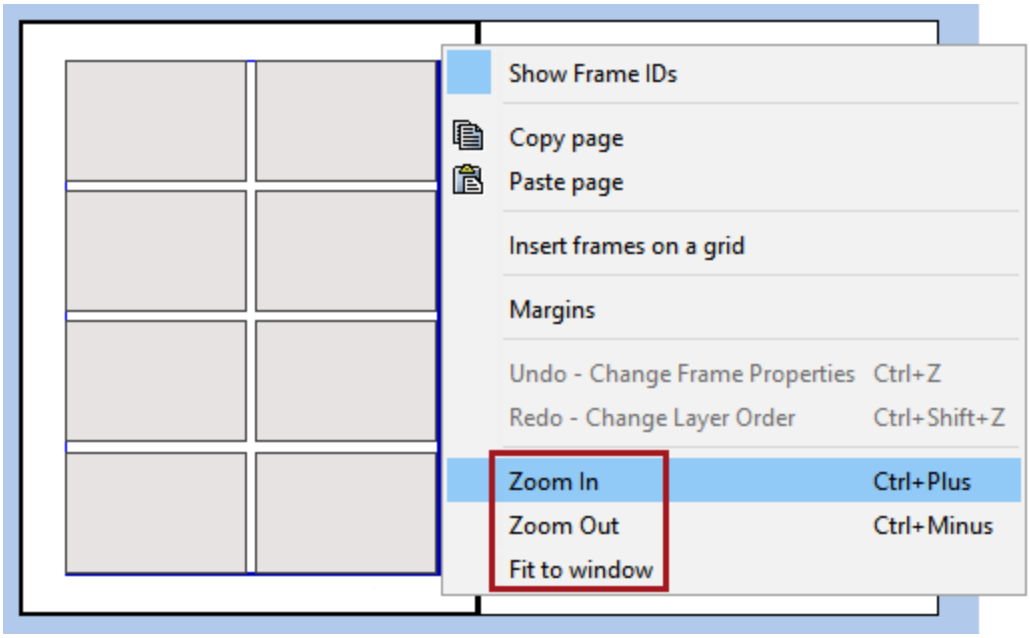


3. The ID of the frame is changed.



Zoom In, Zoom Out, and Fit to Window

Several different methods are available for zooming in and out on pages: right-click menu options, key combinations, and the mouse scroll wheel. When working on Flatplans themselves (planned pages), a zoom slider bar is also available, but is not available when working with page templates. To instantly make a page large enough to fit the entire width of the workbench window, use the 'Fit to Window' option.



Right-click Menu Options for Zoom

1. To zoom in, right-click the page and select **Zoom In**.
2. To zoom out, right-click the page and select **Zoom Out**.

Key Combinations for Zoom

1. To zoom in, select a page, then press **Ctrl+Plus**.
2. To zoom out, select a page, then press **Ctrl+Minus**.

Mouse Scroll Wheel for Zoom

1. To zoom in, select a page, then scroll your mouse wheel downward.
2. To zoom out, select a page, then scroll your mouse wheel upward.

Zoom Slider Bar

Drag the blue slider on the zoom bar to zoom in or zoom out on pages. Only available for Flatplans.

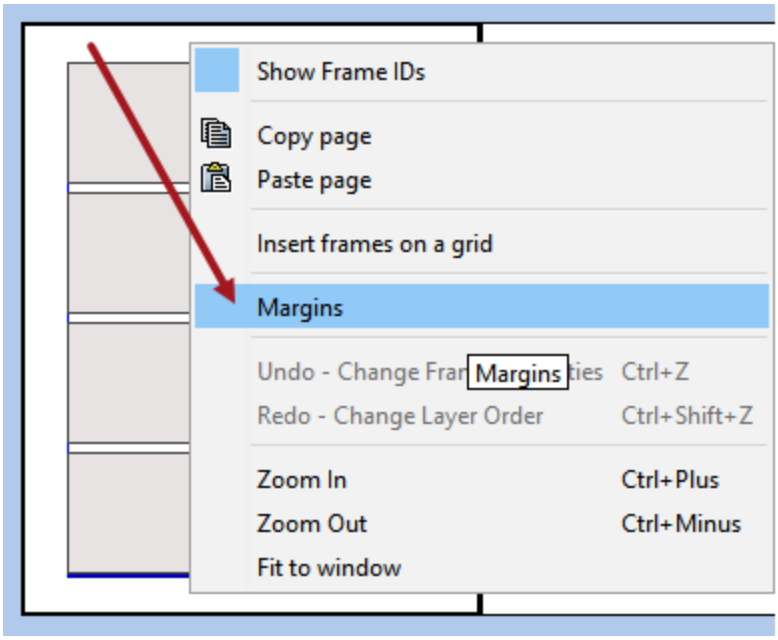
Fit to Window

To automatically zoom in on a page to fit the width of your workbench UI, right-click a page and click **Fit to Window**.

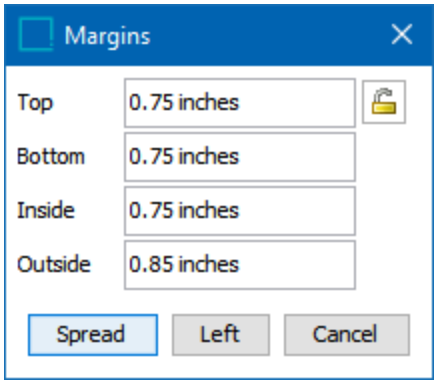
Change Page Margins

By default, page templates pick up the margins from the publication template spread they were created from. Subsequently, planned pages pick up the margins set on the page template, but can be overridden later at the page level. To change the margins of a page:

1. Right-click the white area on the page and select **Margins**.



2. In the **Margins** dialog box, enter the new dimensions for the margins that you want to change. If the padlock icon is set to the unlocked position , each field can be changed individually.

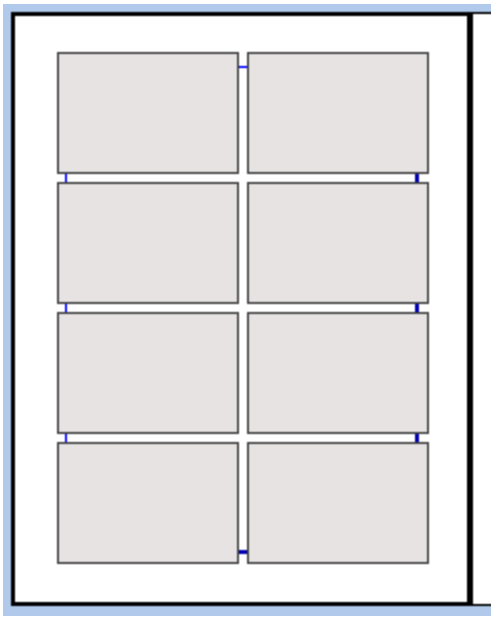


3. If you want all margins in the spread or on the page to be the same, click the padlock icon to change it to the locked position . By default, all margins will be automatically changed to match the Top margin.

   To change all margins to something other than the Top measurement, enter a different value in any field, then click into another field to make the changes.

4. Click **Spread** to apply the changes to both pages, or click **Left** to only apply the changes to the left page. (The button will display **Right** if the right page is selected.)

Note: Changing the margins will *not* change the size of the *frames* on the page. For example, if you previously created frames to align with 0.5 inch margins, then later changed the page margins to 1.0 inches, the frames will not shrink to fit inside of the new margins, as shown below:

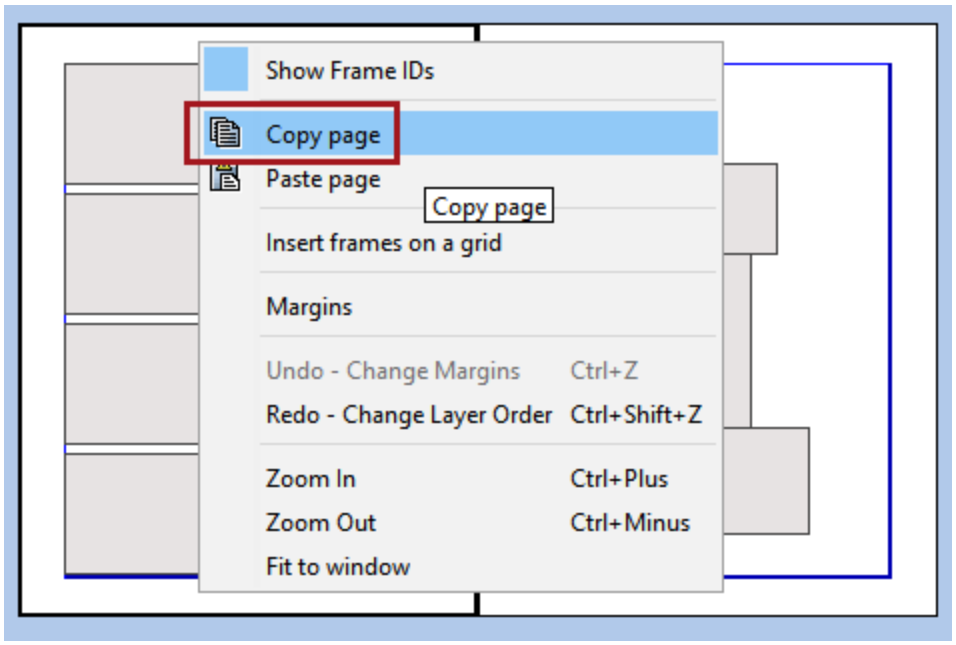


Copy and Paste Pages

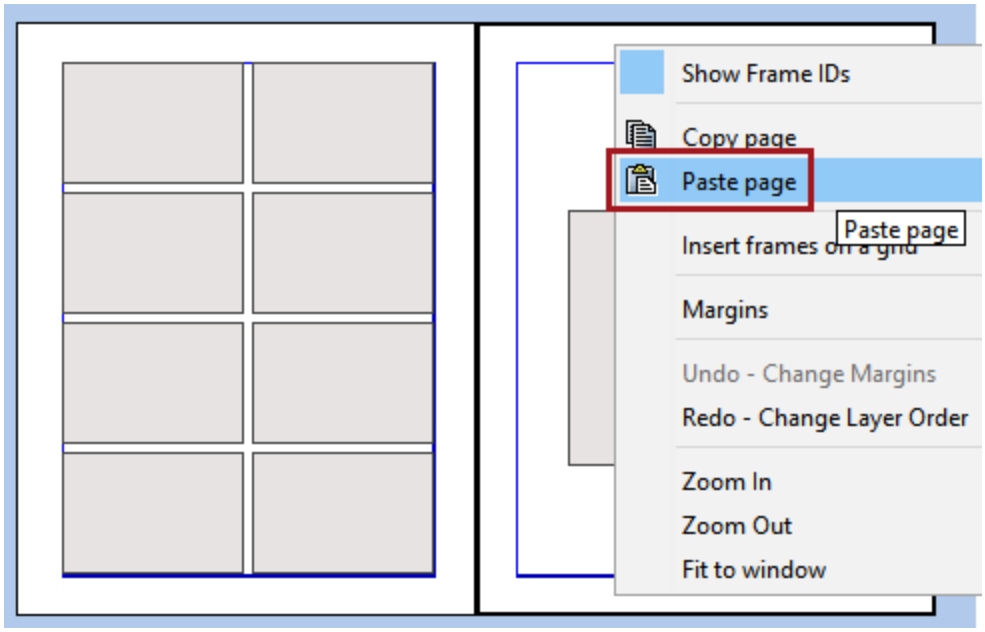
It is possible to copy and paste a page onto another page, including frames. You can copy and paste pages within the same page template or spread, or from one page template or spread to another page template or spread. This simplifies the page creation process by allowing you to create frames on one page only, then duplicate the frames on other pages by copying and pasting the original page.

Note: This will only paste *frames* from one page to another; *margins* from the copied page will not be duplicated on the pasted page.

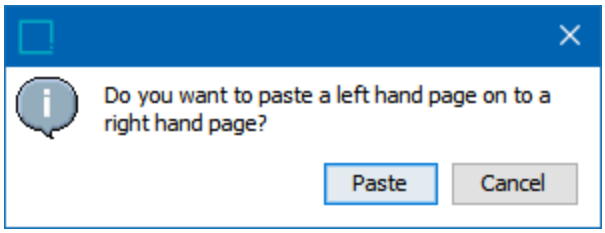
1. Right-click the page you want to copy, then select **Copy Page**.



2. Right-click the other page, then select **Paste Page**.



3. A warning will display if you try to paste a left-hand page to a right-hand page and vice versa. Click **Paste** to continue.



4. The copied page, including frames, is pasted.

View Modes for Planned Pages

A number of **View** options are available when viewing pages in the Flatplanner pane.

The available view modes for **pages** are:

- Plan
- Preview
- Sticker Book
- Mounted Pages

The available view modes for **frames** and **templates** on pages are:

- Show Frame IDs
- Show Product Templates
- Show Page Template

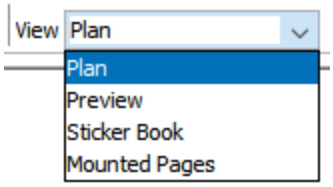
Note: Some views are only available when viewing a plan from the *planned page* level, not from the publication or section level.

This topic describes how to change the view mode of planned pages, explains the available view modes for pages and frames, and also explains what navigational options are available from each view.

Change the View Mode of Planned Pages

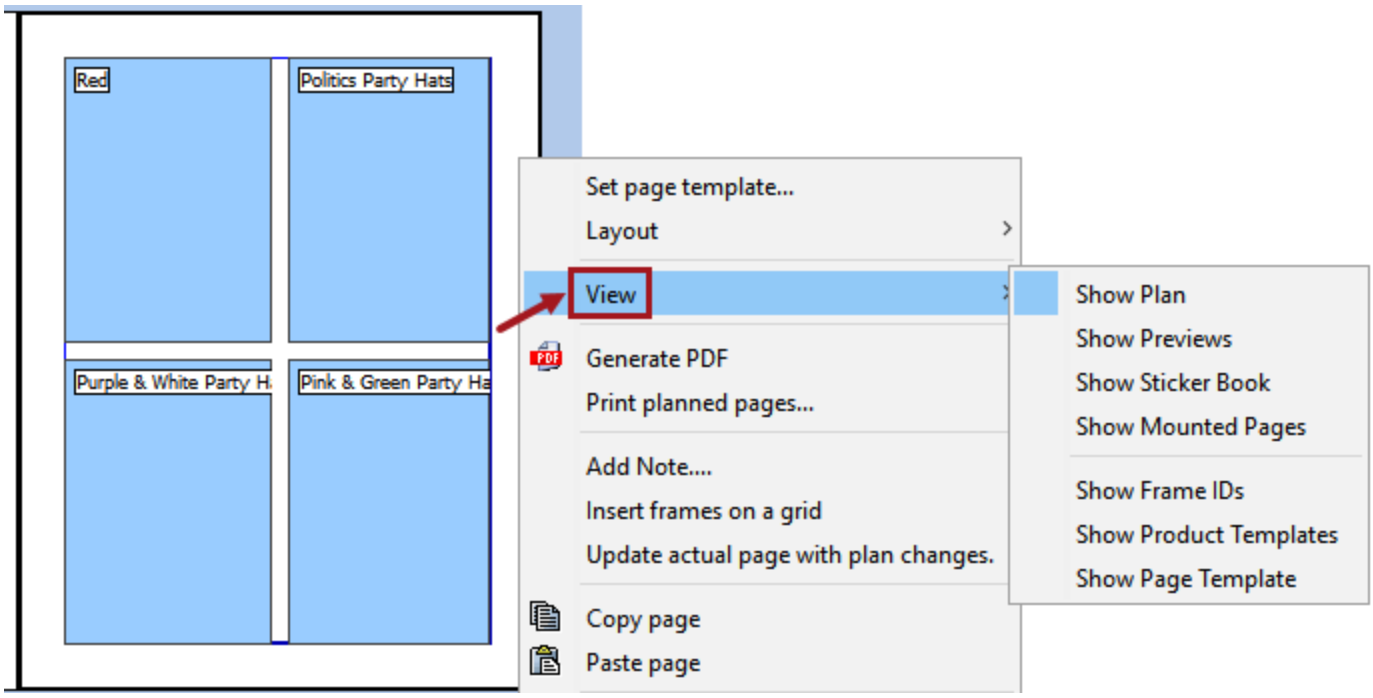
The view mode of planned pages can be changed either through a dropdown list selection or through right-click actions on pages.

1. To change the view mode from the dropdown list, click the gray arrow on the **View** dropdown to access the four available options for planned pages.



2. To change the view mode from the planned page, right-click in the white area of any planned page, then select **View**.

   This right-click menu is available when viewing pages in any view mode. The below screenshot shows a page in Plan view.



3. Choose the relevant option from the View menu. The option will be automatically applied.
4. The options at the bottom of the menu (Show Frame IDs, Show Product Templates, and Show Page Template) can all be applied to the page together, i.e., they are not mutually exclusive. To apply more than one of these options, re-open the View menu and make an additional selection.

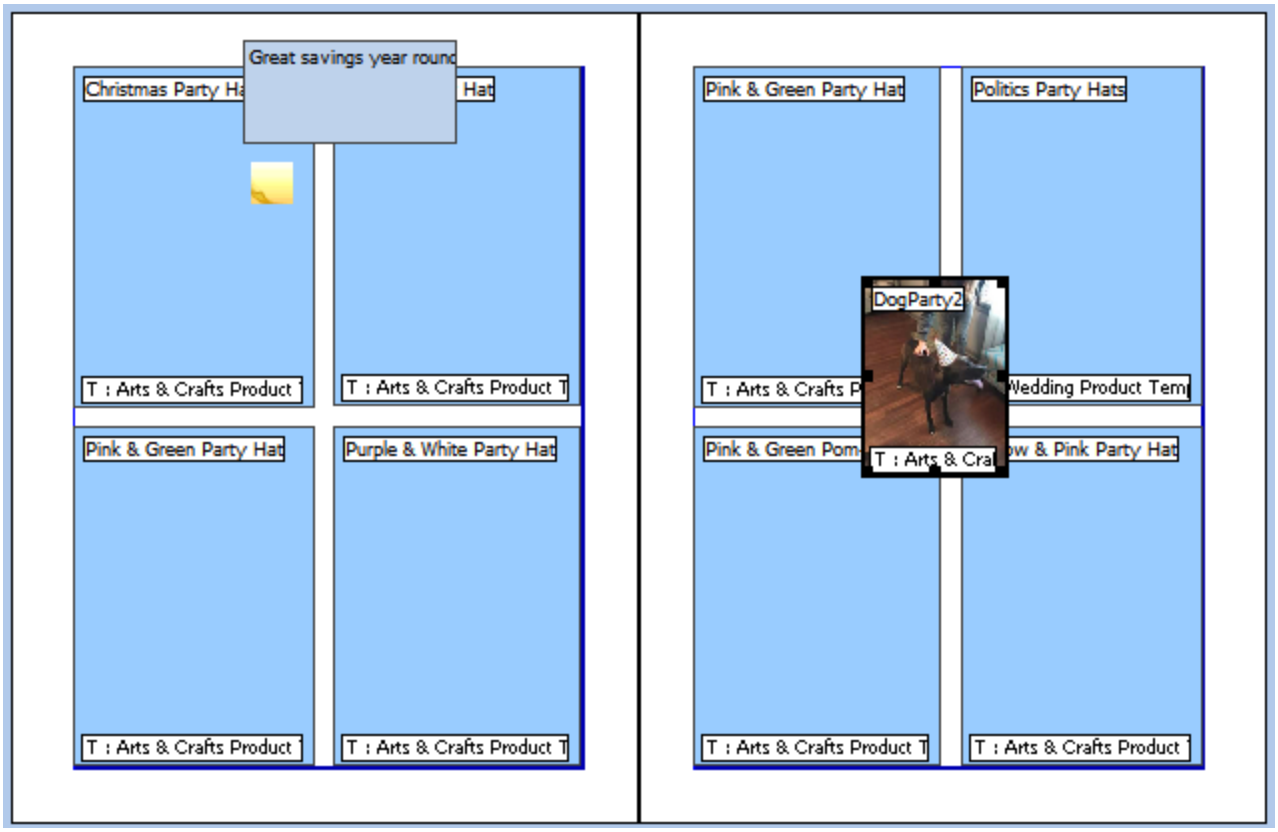
Available Planned Page View Options

The different view options for planned pages are as follows:

Plan

Displays the planned page(s) in the **Plan** view. The actual work in building planned pages is performed in this view. The plan is where products are dragged into frames, product templates are applied, frames are organized, and so forth.

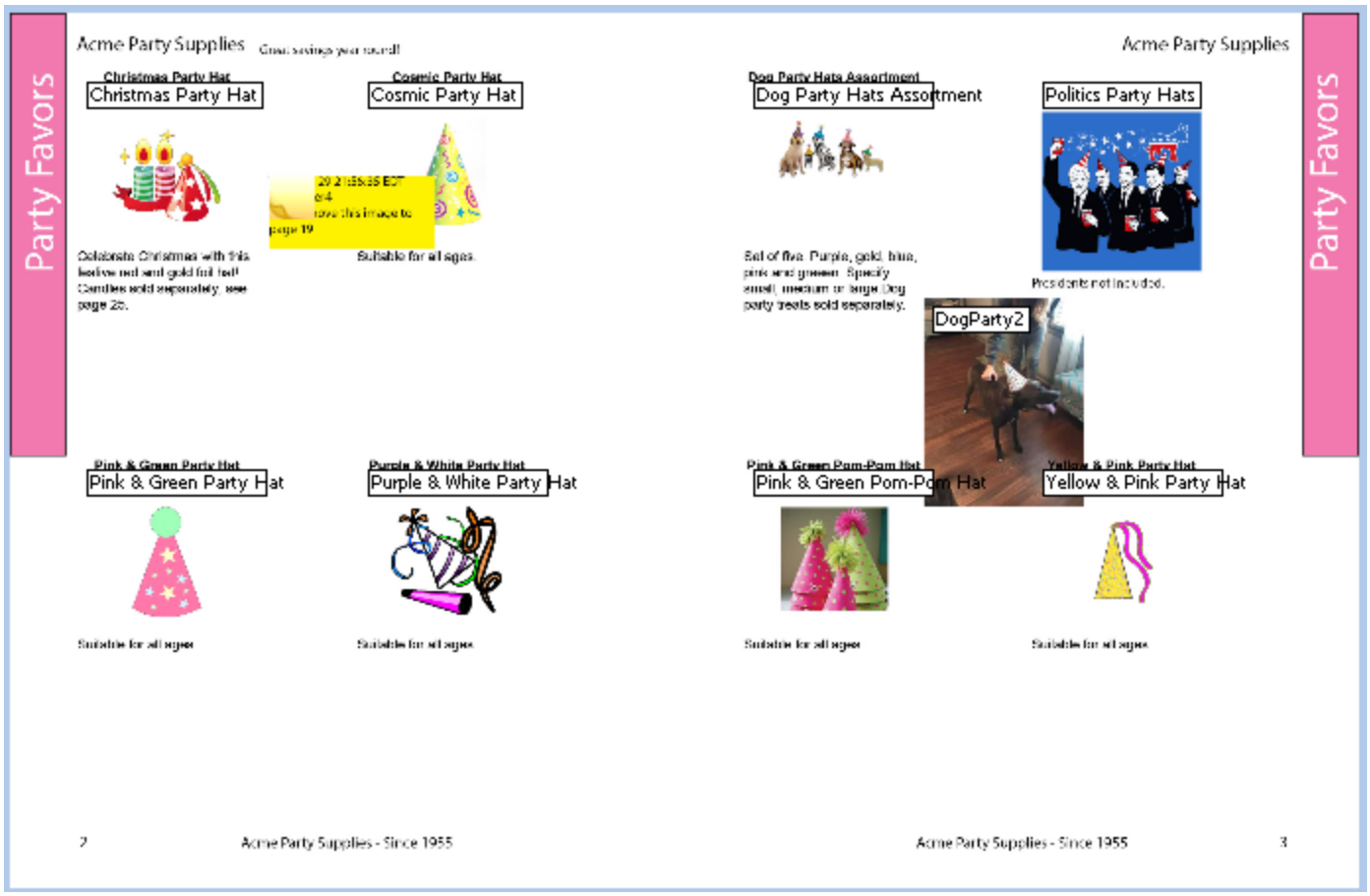
The Plan view displays the pages divided into colored frames where you can mount products, images, or free text. Until a product, asset, or free text is placed into a frame, it will be shaded gray. Once a product is linked, the frame turns light blue. If free text is added, the frame turns pale blue. If an image is linked, the image will display in the frame. If using Galley templates, the text frames display as green when a product is linked.



Preview

Displays a preview of how the product and images are positioned on the page based on the product template applied to the frames. The preview is created from the InDesign (DTP) server. Layouts picked up from another page will also display in the Preview view.

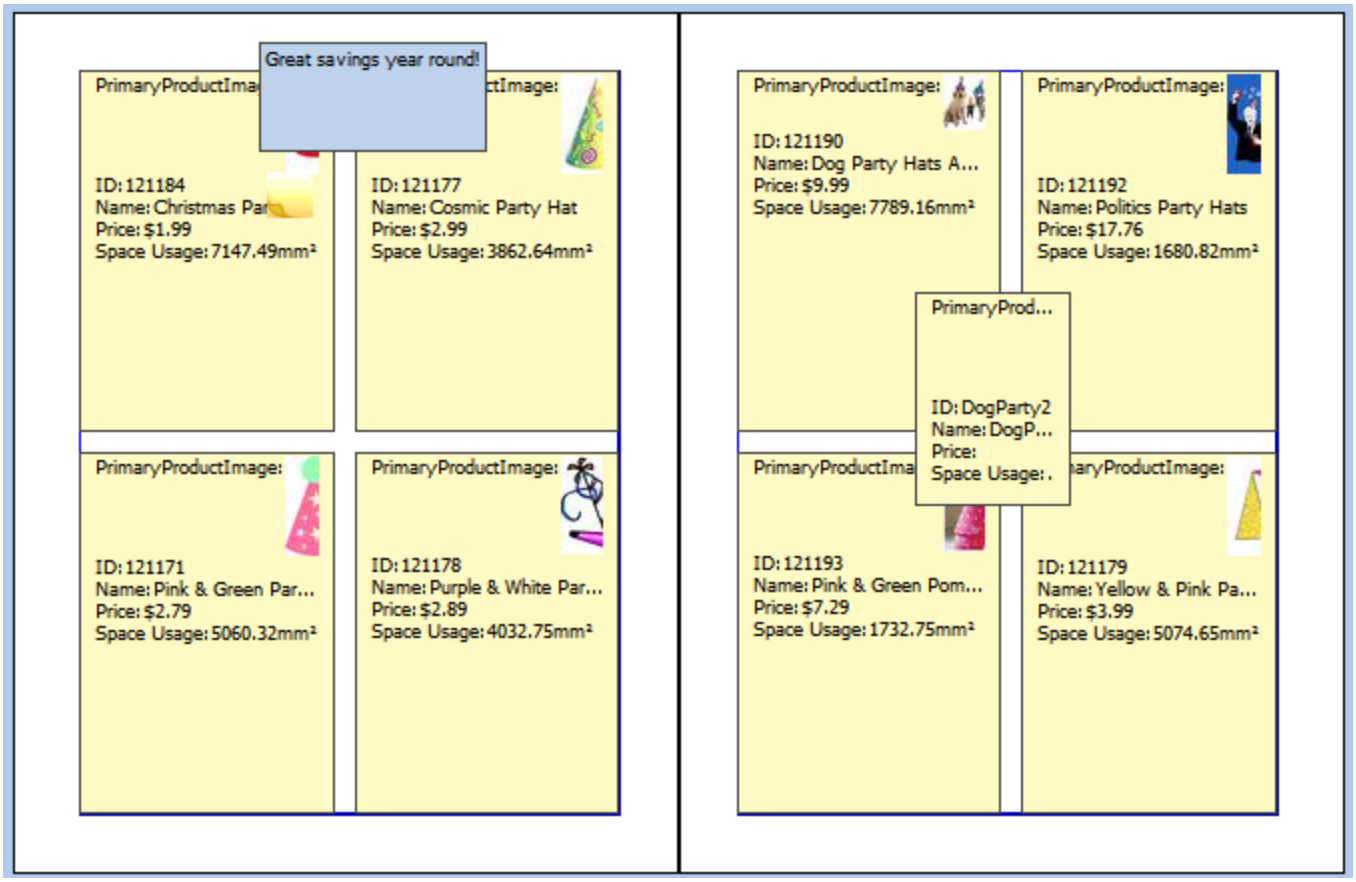
Note: This option is only available when viewing a single spread. This option is disabled if viewing multiple spreads from the publication or section level.



Sticker Book

The below screenshot shows the Sticker Book view, which can be configured to display information about the product or asset assigned to each frame, such as Name, ID, image thumbnails, attribute values, space usage, and pricing.

The information displayed in the Sticker Book view is user-configurable. For information on how to edit the view elements of the Sticker Book, see the **Views** section of this guide.

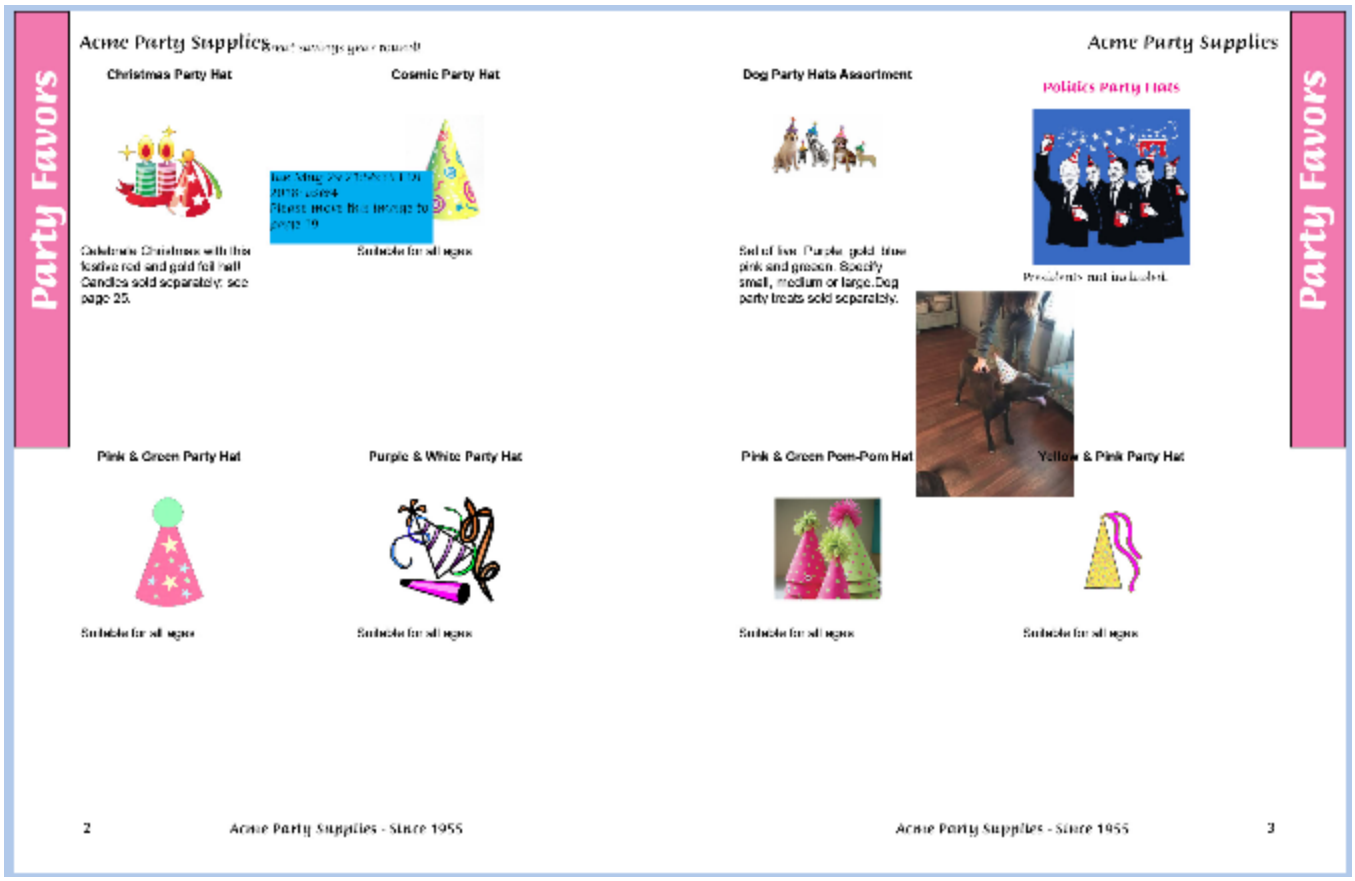


Mounted Pages

Displays the actual InDesign pages that have been completed in InDesign and saved back to STEP. This view is read-only. If no actual pages have been saved to the publication section, this option will be grayed out.

The Mounted Pages view provides an easy, visual way of inspecting pages to determine if the product selection or layout of the mounted page is out of sync with changes made to the planned page since the InDesign page was last handled.

Note: This option is only available when viewing a single spread. This option is disabled if viewing multiple spreads from the publication or section level.



Available View Options - Frame and Template Identifiers

The following view options are available to display information about frames and templates when viewing planned pages. **Frame IDs** and **page template** are visible in all four view modes (Plan, Sticker Book, Preview, Mounted Pages). **Product template** is only visible in the Plan view.

Show Frame IDs

This option displays the ID of each frame on the plan. Frame IDs are used to designate which frame a particular object and/or product template is linked to. They are primarily used when importing and exporting Flatplanner publications using Publication Excel files. *(**1** in below screenshots)*

Show Product Template

Displays the product template that is assigned to each frame. If the page has already been mounted in InDesign, the frame will display 'Keep Layout.' This is only available in the **Plan** view. *(**2** in the Plan view screenshot below)*

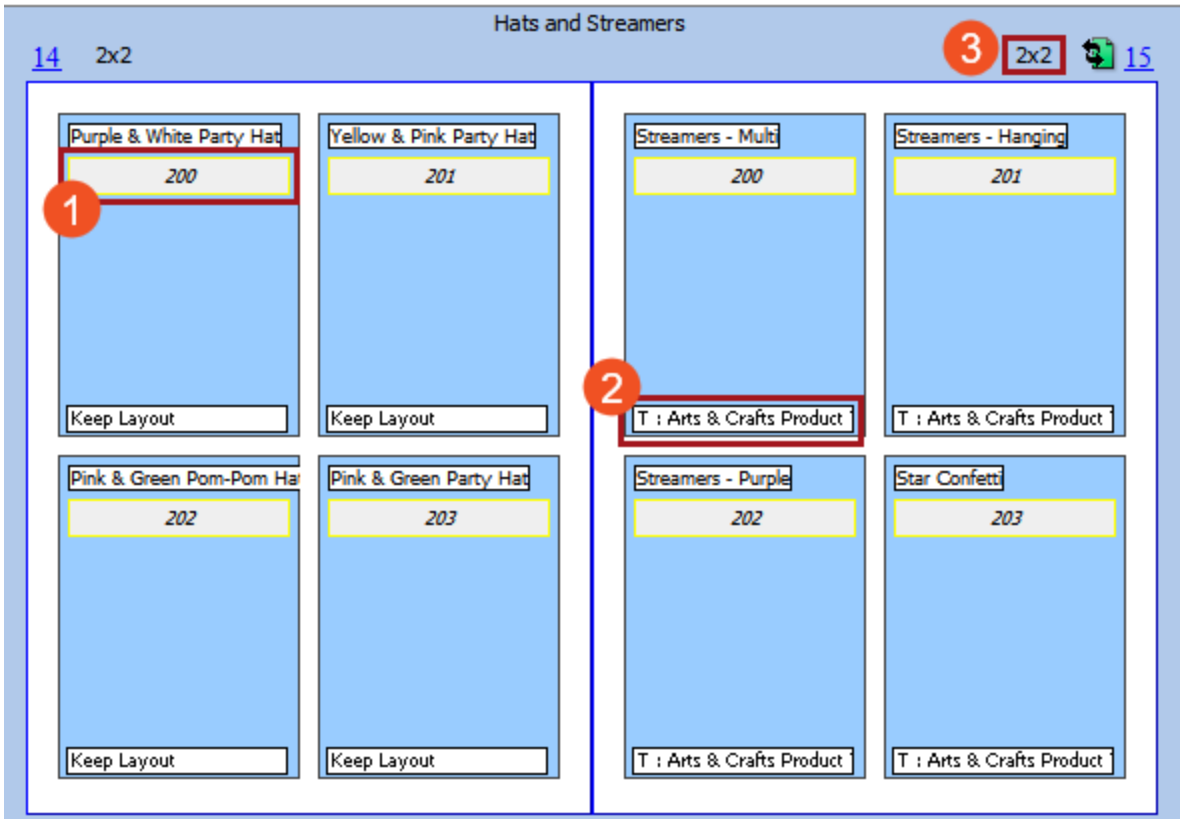
Show Page Template

Displays the page template that is assigned to the page. *(**3** in below screenshots)*

Frame and template identifiers - Plan view

The following screenshot shows how these options display in the **Plan** view.

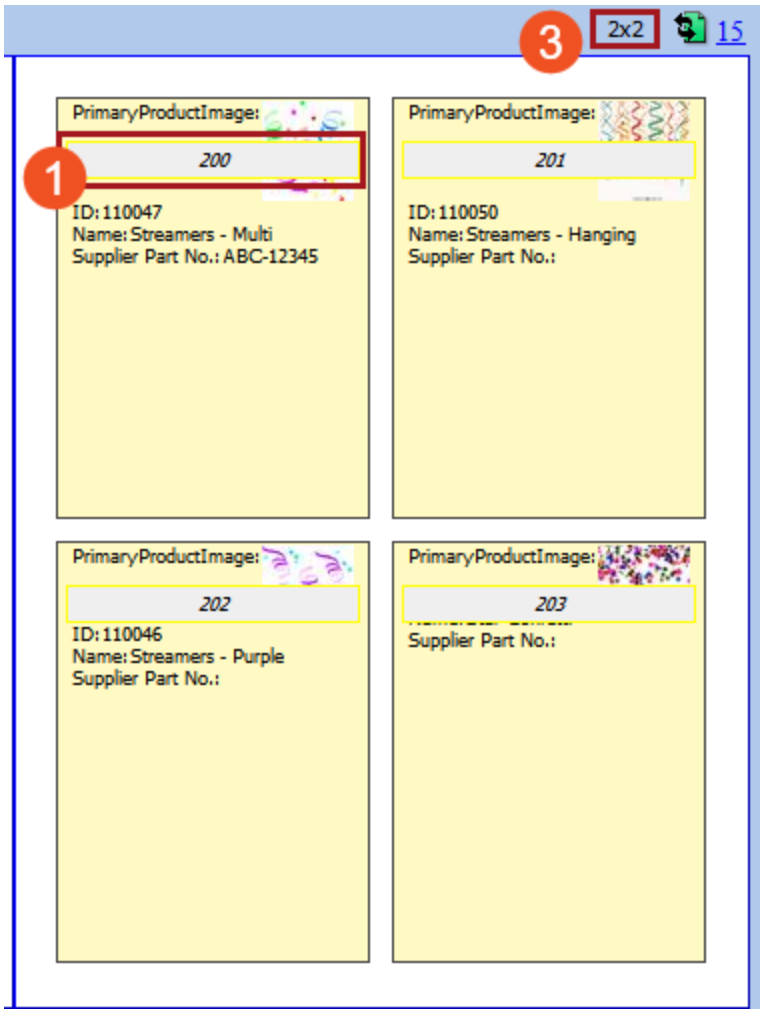
1. Frame ID
2. Product Template
3. Page Template



Frame and template identifiers - Sticker Book view

The following screenshot shows how these options display in the **Sticker Book** view. The display is similar in the Preview and Mounted Pages views.

1. Frame ID
2. Product Template - Not displayed, since this identifier is unavailable in the Sticker Book, Preview, and Mounted Pages views.
3. Page Template



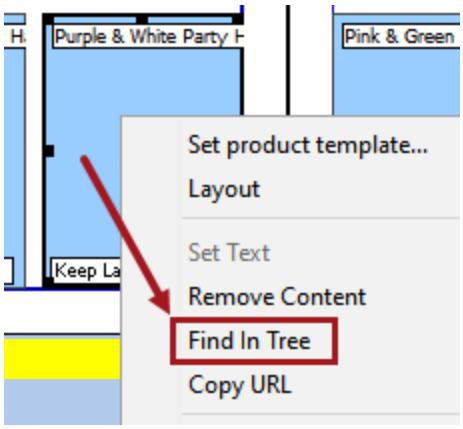
Navigational Options from Planned Pages

In the **Plan**, **Preview**, and **Mounted Pages** views, two navigational options are available from frames: **Find in Tree** and **Copy URL**. These options make it easy to locate an object applied to a frame without having to search for it or browse to it in the Tree.

Find in Tree

To immediately locate an object in the Tree:

1. Right-click on the relevant frame and select **Find in Tree**.

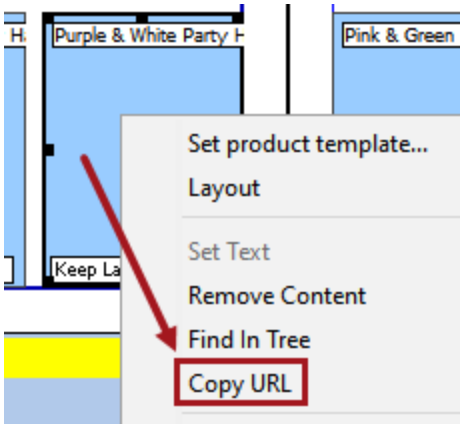


2. The object is automatically selected in the Tree.

Copy URL

To copy the URL of the object's location in the Tree:

1. Right-click on the relevant frame and select **Copy URL**.



2. The STEP URL will be copied to your clipboard. For example, step://product?editor=Product&id=121171.
3. Paste this link into the URL field at the top of the STEP interface to select the object in the Tree.

Designing Frames for Planned Pages

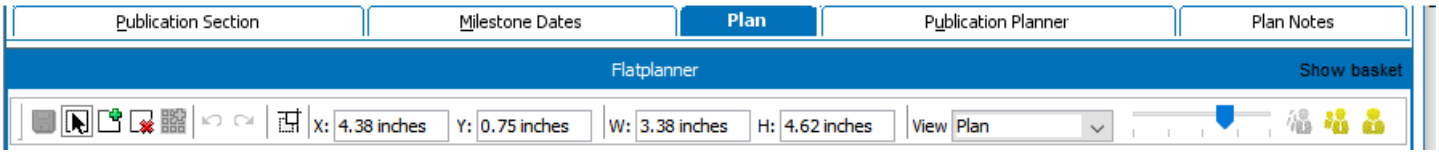
By default, a new Flatplanner planned page displays with a number of predefined frames. These frames are inherited from the page template that was assigned to the page when it was created. However, sometimes it may be necessary to override the layout inherited from the page template. One example would be if all pages in a section look basically the same, but one or two pages need minor layout adjustments to accommodate a special design need, such as enlarging an image or adding / removing products.

The tools in the Designer toolbar on the **Plan** tab are used to create and edit page frames. This toolbar is nearly identical to the one used on the Designer tab that is used to create page templates. The only differences between the two toolbars is that the toolbar on the Plan tab has the following additional elements: a **View** dropdown, a **zoom** slider bar, and three **workflow** assignment icons.

Designer Toolbar

To access the designer toolbar:

1. Select a publication, section, or spread in the Tree, and then click the **Plan** tab.
2. If the Flatplanner pane is hidden, then click the **Show flatplanner** link in the upper right corner of the screen to view the Flatplanner pane. The Flatplanner pane must be visible to access the designer toolbar.



The following table gives a brief explanation of each option available on the toolbar.

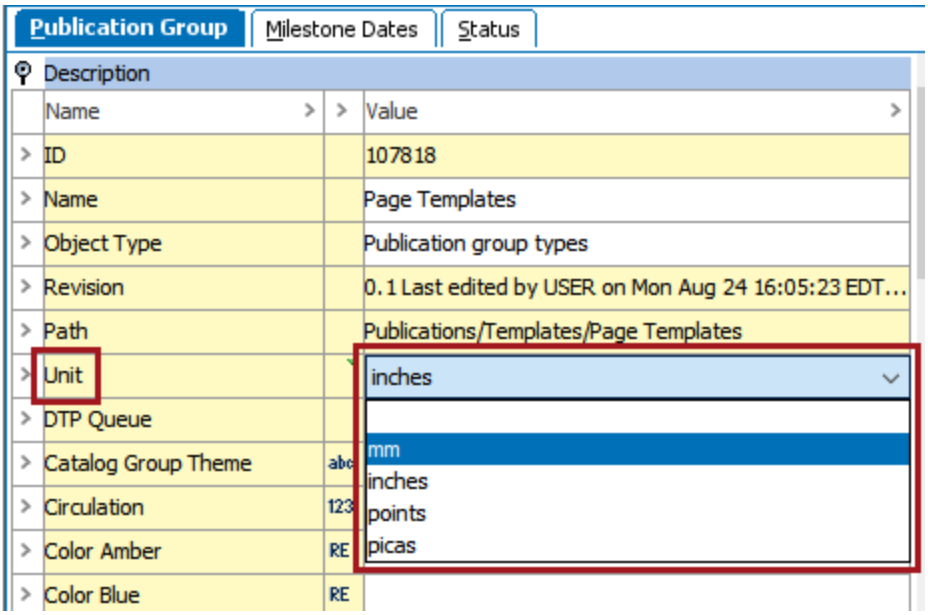
Tool	Description
Save	Saves all changes
Select	Used to select and move frames and content on the page by dragging them.
Add frame	Used to add new frames by clicking and dragging the mouse.

Tool	Description
Delete	Used to delete a frame. Delete is only enabled when one or more frames are selected.
Insert frames on a grid	Used to insert multiple frames in a grid on the page.
Undo	Used to undo your last action.
Redo	Used to redo your last action.
Snap positioning toggle button	Used to enable or disable snapping of frames when they are moved or re-sized. Enabling this option will cause a green guide line to appear on the page when a frame is moved near other frames, either on the same page, or the facing page. Snapping the frame to the green guide line will automatically aligns the frame you are dragging with another frame on the page.
X Pos	Shows the horizontal position of a selected frame. If more frames are selected, the horizontal position is only displayed if it is the same for all selected frames. To change the horizontal position of a frame, enter a new value in the X position field.
Y Pos	Shows the vertical position of a selected frame. If more frames are selected, the vertical position is only displayed if it is the same for all selected frames. To change the vertical position of a frame, enter a new value in the Y position field.
Width	Shows the width of a selected frame. If more frames are selected, the width is only displayed if it is the same for all selected frames. To change the width of a frame, enter a new value in the Width field.
Height	Shows the height of a selected frame. If more frames are selected, the height is only displayed if it is the same for all selected frames. To change the height of a frame, enter a new value in the Height field.

Tool	Description
 View	Dropdown menu that controls the view of the Flatplan(s) in the Flatplanner pane. Available options are Plan, Sticker Book, Preview, and Mounted Pages. (The Preview and Mounted Pages options are only available when at the individual spread level.)
 Zoom bar	Use this slider bar to zoom in or out on Flatplans.
 Workflow assignment icons	Select one of these icons to view Flatplans based on assignee. These icons are available when viewing multiple plans from the publication or section level. The options are, L - R: • Show All Plans • Show Group Assigned Plans • Show Assigned Plans *Only applicable if using a Flatplanner workflow.*

Change the Unit for Dimensions Fields

To change the measurement unit used for the dimensions fields (X Pos, Y Pos, Width, and Height), change the **Unit** on the publication group that contains your publication, as shown in the below screenshot.



Adding Objects to a Page

Products, assets (typically images), classifications, and entities can be dragged and dropped onto frames on a page from the following locations:

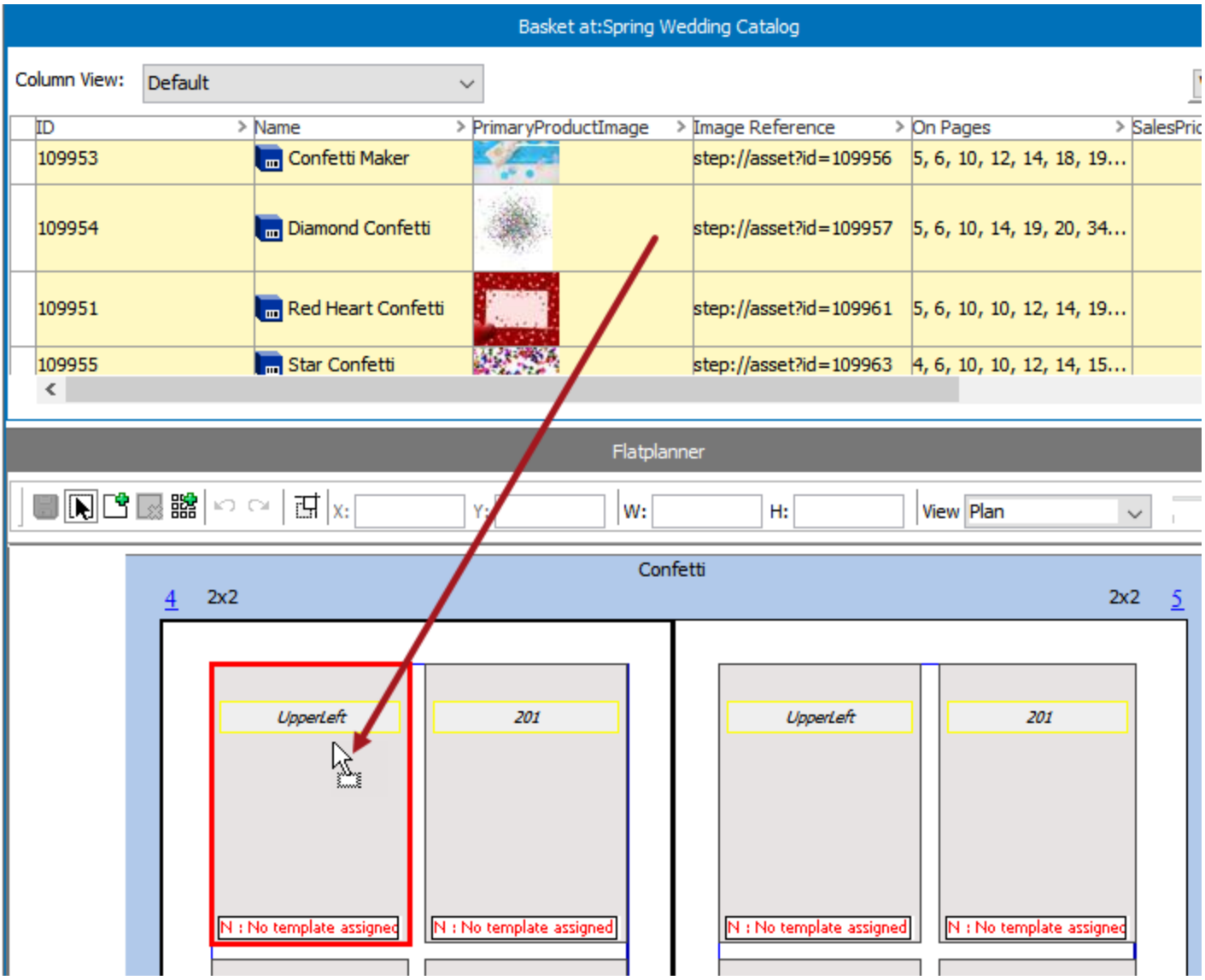
- Basket *(does not apply to entities)*
- Tree
- Collection list
- Search result

This topic describes the manual methods for linking objects to Flatplanner frames through dragging and dropping. For information on how to link objects to Flatplanner frames through imports, see the **Exporting and Importing Flatplanner Publications** section of this guide.

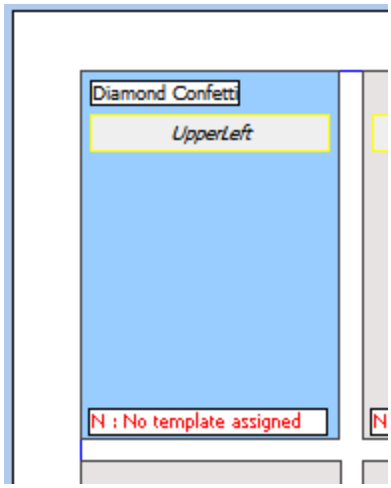
Dragging and Dropping from the Basket

To drag objects from the basket to the Flatplanner:

1. While on the **Plan** tab, click **Show basket** to make the basket available.
2. Select the relevant object in the basket, then hold down your left mouse button while dragging the object from the basket onto the desired frame on the planned page.

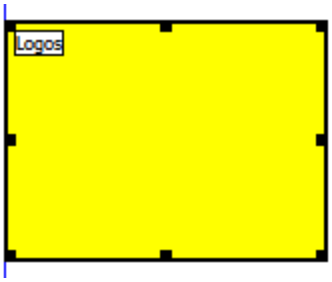


3. Once linked, the name of the object displays in the left corner of the frame.
   - If linking a **product**, the frame shading changes from gray to blue.

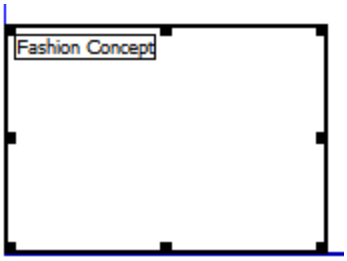


- If linking an **asset**, a rendering of the asset displays in the frame:

- If linking a **classification**, the frame turns yellow:



- If linking an **entity**, the frame turns white:



4. If you have already set up a **pagination rule** to apply a default product template, the product template will be automatically assigned when the product is dropped into the frame. Otherwise, the text 'No template assigned' will display at the bottom of the frame. If dragging an *asset* into a frame, no product template is required.

   For more information on pagination rules, see the **Flatplanner Pagination Rules** section of this guide. for more information on linking product templates to frames, see the **Applying Product Templates to Page Frames** topic in this guide.

Dragging and Dropping from the Tree

You can drag and drop objects directly from the Tree to the Flatplanner.

1. Ensure that the editor is locked by checking the **Thumb Pin** icon . Otherwise, the GUI display will switch away from the Flatplan when you click an object in the Tree.
2. In the Tree, expand the classification or product hierarchy and locate the product or image you want to use.
3. Drag and drop the relevant product or image from the Tree to a frame on the page.

Dragging and Dropping from a Collection

You can drag and drop objects directly from a collection list to the Flatplanner.

1. Ensure that the editor is locked by checking the **Thumb Pin** icon . Otherwise, the GUI display will switch away from the Flatplan when you click an object in the collection.
2. In the Tree, expand the relevant **Collection** hierarchy.
3. Drag and drop the relevant products or images from the collection list to a frame on the page.

Dragging and Dropping from a Search Result

You can drag and drop objects directly from a search result to the Flatplanner.

1. Ensure that the editor is locked by checking the **Thumb Pin** icon . Otherwise, the GUI display will switch away from the Flatplan when you click an object in the search result.
2. In **Search**, define your search criteria and then click **Search**.
3. The search results are displayed in the **Search Result** window.
4. Drag and drop the relevant products or images from the search result to a frame on the page.

Changing and Reapplying Page Templates

Page templates are assigned to planned pages when they are first created, either at the time a section is added to the publication, or when new pages are added to a section in the Publication Planner. It is also possible to change the page template on a planned page later, either from the Flatplan, the Publication Planner, or from the Tree, where page templates can be reapplied to multiple pages in one operation.

Note: If you want to apply a different page template to the left page and the right page in a spread, this can only be done on the planned page *after* it is created, not at the time the page is created.

Prerequisites

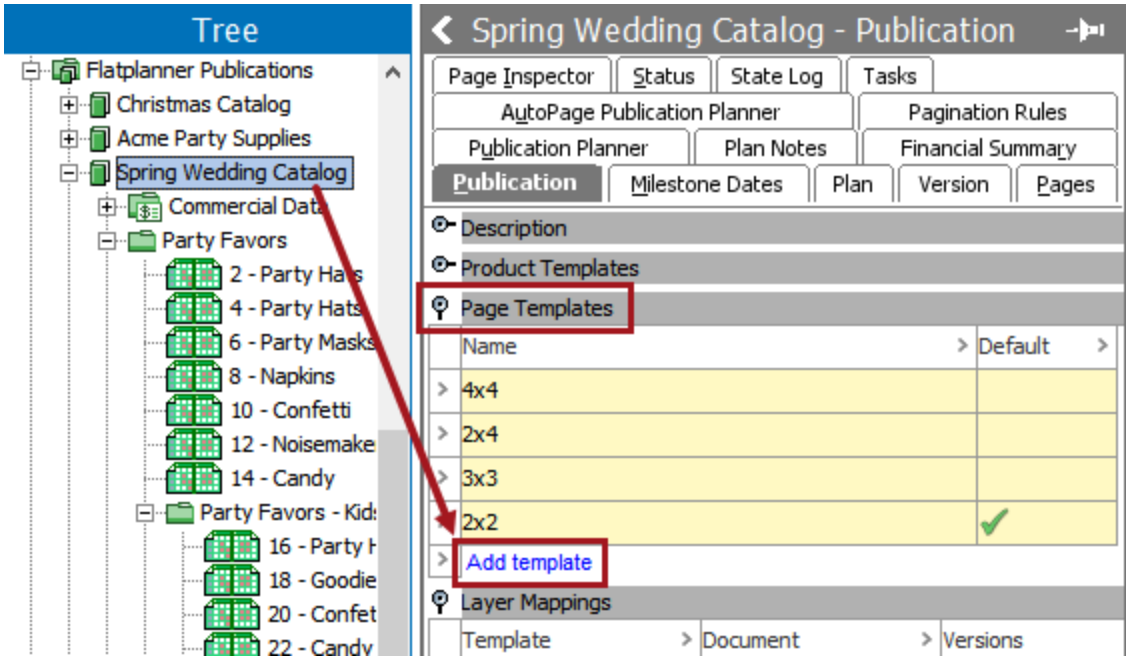
This topic assumes the following:

- More than one page template has already been added to your publication
- A page template has been selected as the default template

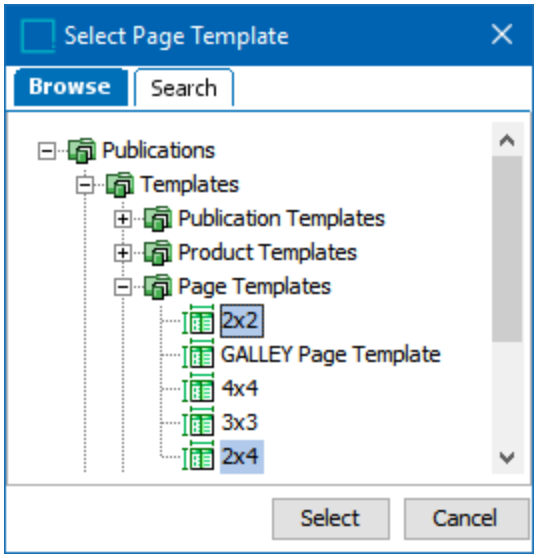
Availability of Page Templates

Page templates must first be added to the publication before they can be added to planned pages. If the template that you want to use is not yet linked to your publication, follow these steps:

1. In the Tree, navigate to the **publication** that houses your planned pages.
2. On the Publication tab, expand the **Page Templates** flipper, then click **Add template**.



3. In the **Select Page Template** dialog that displays, either search for or browse to the page template(s) that you would like to add to your publication. To select more than one template, hold the Ctrl or Shift key while making selections. Click **Select** when finished.



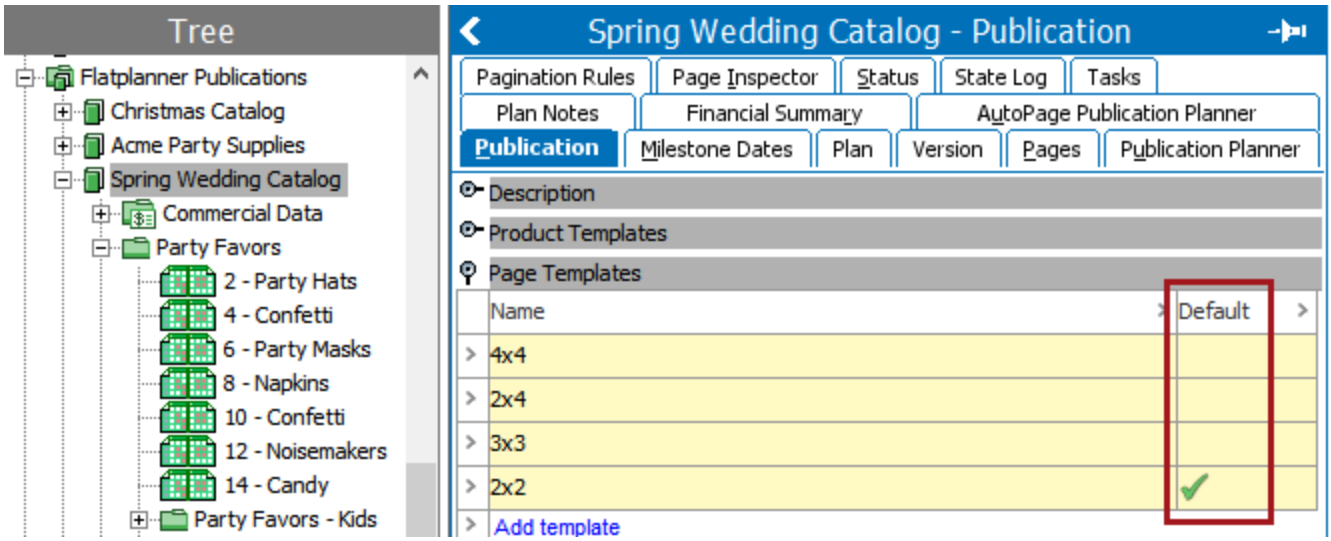
4. The selected page template(s) are now available for use on all planned pages in your publication.

Selection of Default Page Template

A default page template is set on the **publication**. Changing the default page template on the publication has no effect on existing planned pages, but can be useful if you decide that you would like to simplify the process of choosing a page template going forward when new pages are created. The default page template will always display as the default selection in any dropdown list that is used when choosing a page template.

To change the default page template:

1. In the Tree, navigate to the **publication** that houses your planned pages.
2. On the Publication tab, expand the **Page Templates** flipper.
3. Check the empty field in the **Default** column next to the page template that you would like to use as the default page template for all new pages going forward.

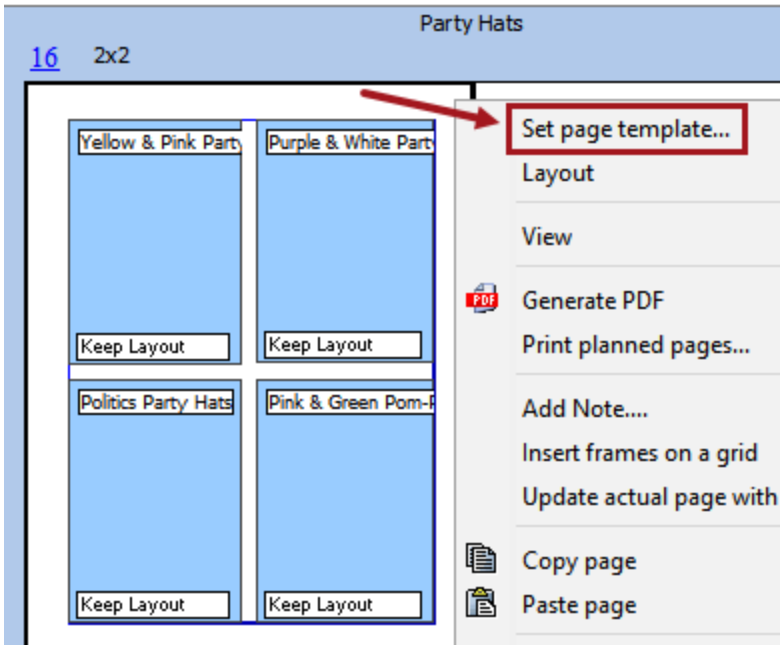


Change a Page Template from the Flatplan

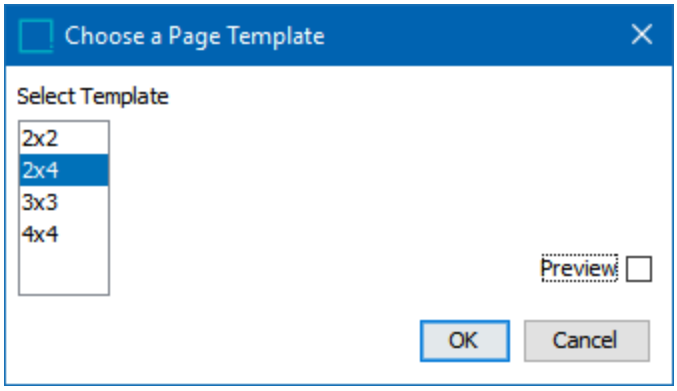
The page template can be changed on a planned page when viewing the spread in either the **Plan** view or **Sticker Book** view on the Plan tab. Using this method, the page template has to be applied on one page of the spread at a time, i.e., the page template has to be changed in separate operations on the left page and the right page.

To change the page template from the planned page:

1. Navigate to the relevant planned page in the Tree, then click the **Plan** tab.
2. Alternatively, if you have selected a publication or section object in the Tree in order to view multiple Flatplans at once, then navigate to the relevant planned page in the **Flatplanner** pane.
3. Right-click a white area on the page, then select **Set page template**. In this example, the existing page template is named '2x2' and displays two frames per row and two frames per column.

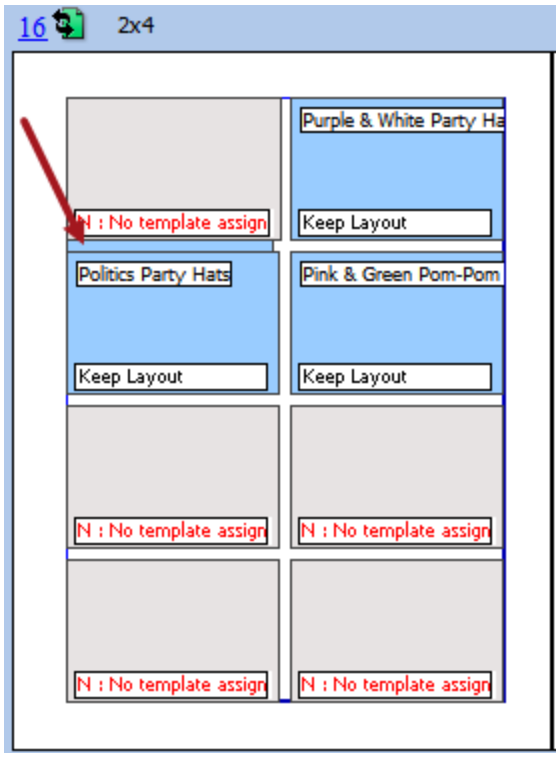


4. In the **Choose a Page Template** dialog, choose the preferred template from the list of available templates, then click **OK**. In this example, the new page template will be named '2x4,' which will display two frames per row and four frames per column.

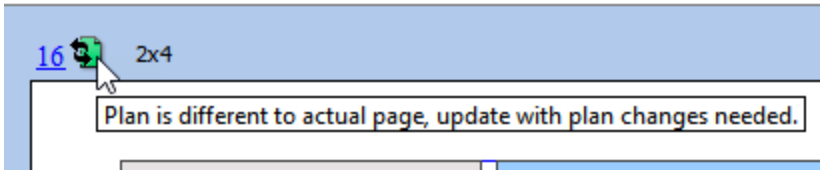


5. The new page template is applied, and the frame layout is changed accordingly. If the 'Show Page Template' option has been enabled, the name of the new page template will be displayed next to the page number.

> **Note:** If the page frames contained no content before the page template was changed, the frames will be replaced with frames from the new layout. If any frames from the previous layout already had content applied, the frames will be retained, but some may be layered and/or partially hidden behind the new frames, as shown in the below screenshot.



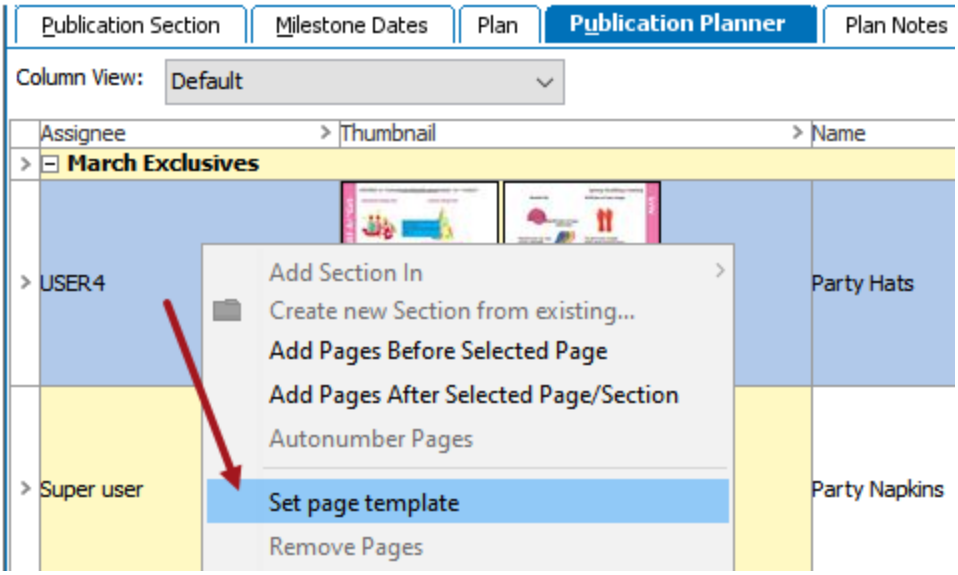
6. If an actual page has already been saved back to STEP, then an 'update needed' icon will display next to the page number to indicate that the plan layout is now different from the layout of the actual page. For information on how to update actual pages with plan changes, see the **Updating Documents in Flatplanner** section of this guide.



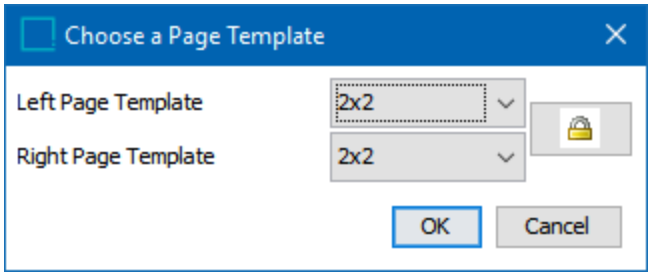
Change a Page Template from the Publication Planner

Changing a page template from the Publication Planner allows you to select a different page template for the left page and right page in one operation.

1. Click the **+** sign next to the name of a section to view the pages of the section. (This step is only required if the 'Group by section' option is enabled.)
2. Select the row of the preferred page, right-click, and then choose **Set Page Template**.



3. In the **Choose a Page Template** dialog, select a page template to apply to the **left** page of the spread and to the **right** page of the spread.



4. To use different templates on the left and right page, click the **Padlock** button to unlock it .
5. Click **OK** to apply the page template(s).

Reapply a Page Template

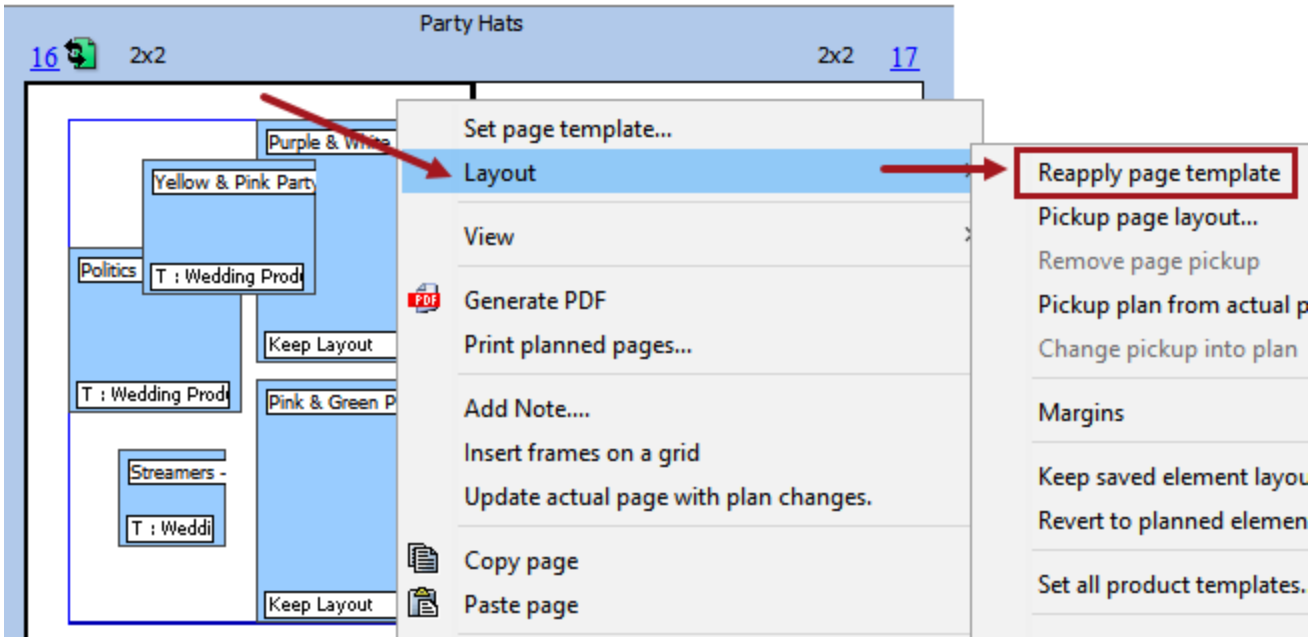
A page template can be reapplied to a page if you have resized and/or changed the position of the frames but want them to revert back to the original layout of the page template.

While the position of a frame can change after changing the page template, the content of the frame remains the same. If you have added additional frames with content, those frames will remain on the page as well. However, frames without content are deleted.

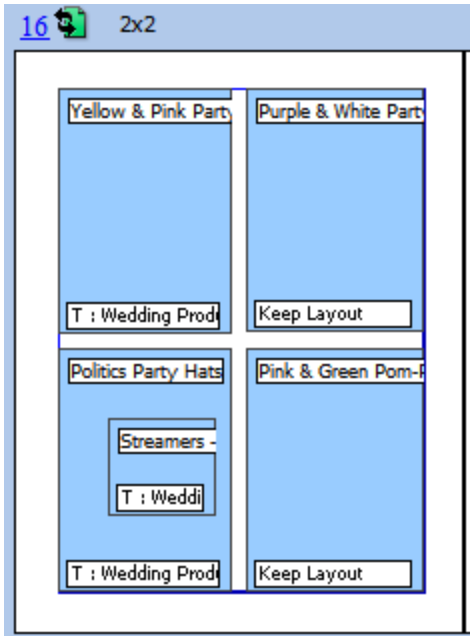
Page templates can be reapplied to planned pages from the Flatplanner pane and the Tree, but not from the Publication Planner.

Reapply a Page Template from the Flatplan

1. On the planned page, right-click in any white area, then select Layout > **Reapply page template**.



2. The layout reverts to that of the original page template. As previously mentioned, any additional frames that were added to the page will remain, as shown in the screenshot below.

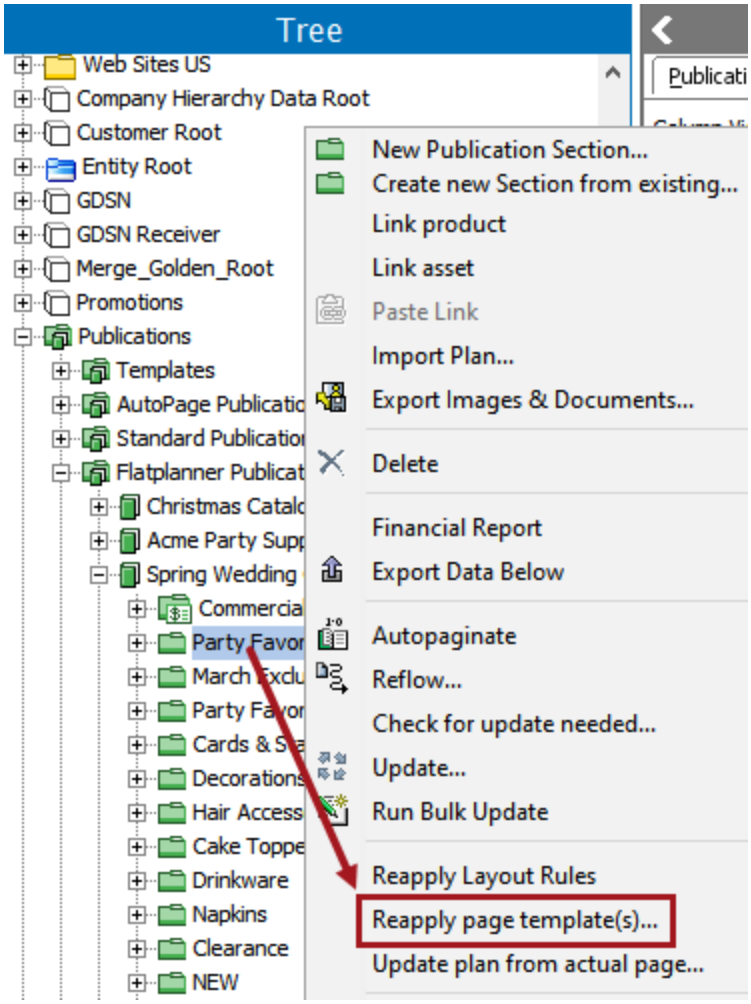


Reapply Page Templates from the Tree

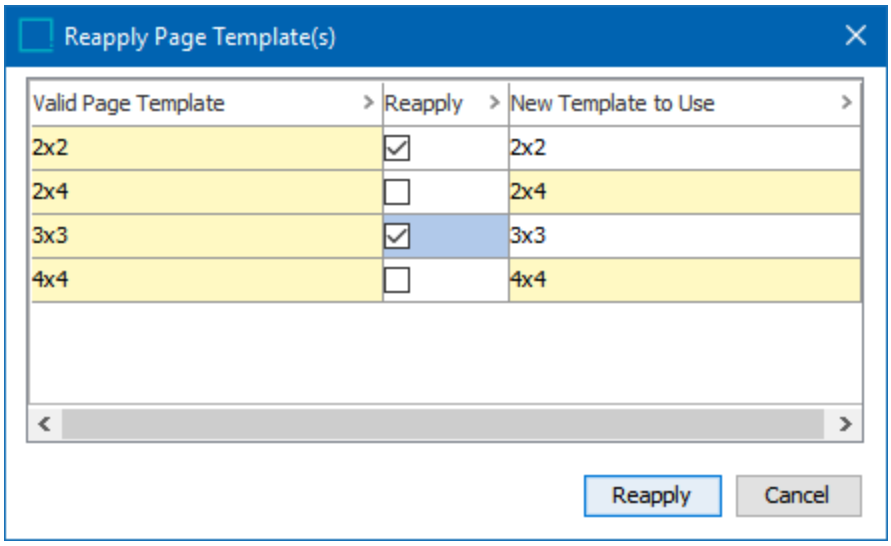
Page templates can be reapplied to multiple planned pages at once at the publication, section, or subsection level.

Note: This process affects all planned pages in the selected publication, section, or subsection that use the page template(s) specified for the operation.

1. In the Tree, right-click on the publication, section, or subsection that contains the pages to which you want to reapply the page templates, then select **Reapply page template(s)...**.



2. In the Reapply Page Template(s) dialog that displays, check the boxes of the page templates that you want to reapply, then click **Reapply**. Page templates can only be reapplied using the original page template; they cannot be replaced with a different template.



3. The page templates will be reapplied to all relevant planned pages in the publication, section, or subsection.

Applying Product Templates to Page Frames

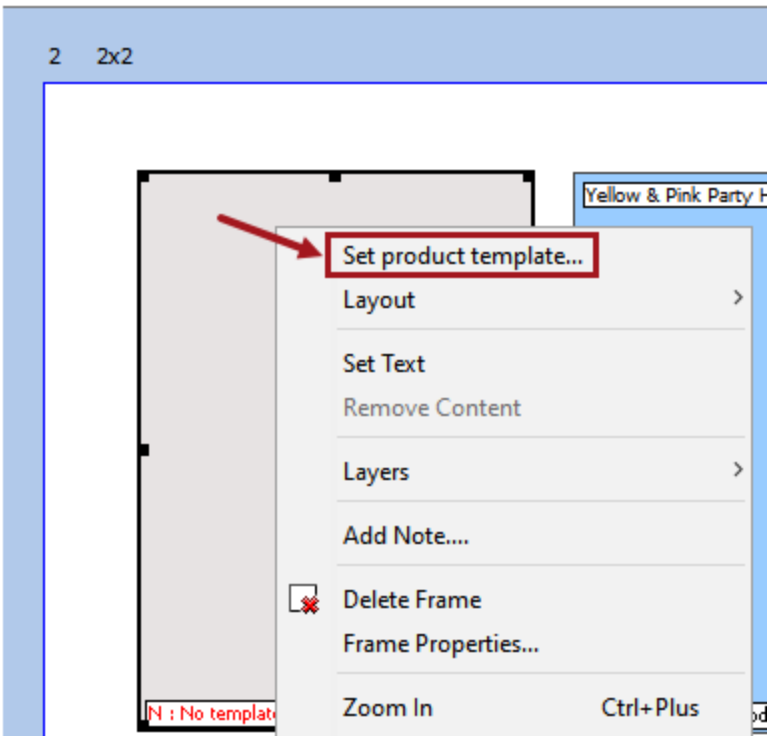
All Flatplanner page frames that will be used to mount products must have a product template assigned, otherwise the products will not be mounted. This topic describes how to add a product template to a single page frame or to all frames on a page at once. Once added, the product template can be easily changed later, if needed.

This topic explains how to add, change, or remove product templates from frames when working in the **Plan** view of the Flatplanner. For information on how to apply product templates using **pagination rules**, see the **Flatplanner Pagination Rules** section of this guide.

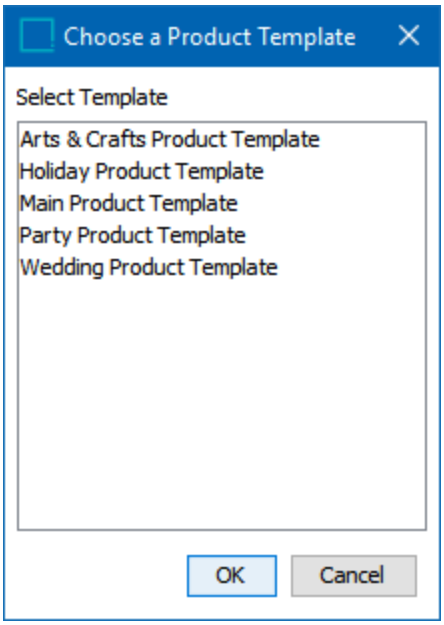
Note: Product templates are not needed for frames that will be used to mount images or free text.

To Add or Change a Product Template

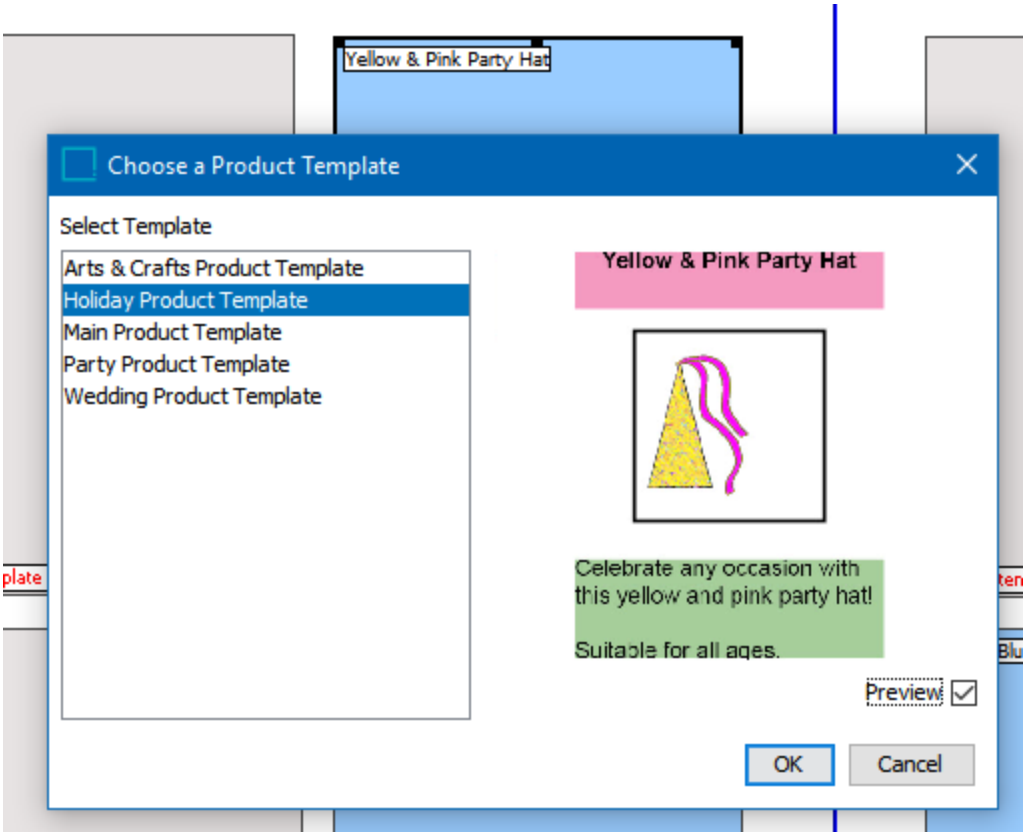
1. In the **Tree** expand the **publication** hierarchy, then expand the relevant publication.
2. Click the relevant spread, then click the **Plan** tab.
3. Right-click a frame in the Flatplanner, then select **Set product template**.



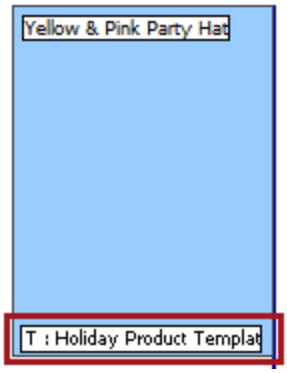
- If the frame does not yet have a product linked (**gray** shaded frame, pictured in previous screenshot), the **Choose a Product Template** dialog will contain a simple list of product templates.



- If the frame *does* have a product linked (**blue** shaded frame), The **Choose a Product Template** dialog will not only have a list of available product templates, but it will have a **preview** area that will give a rough estimate of how the product will look once mounted onto an InDesign page using that template. Check the **Preview** box to activate the preview feature when deciding which template to select.



4. After selecting the desired template, click **OK**.
5. The name of the applied product template displays at the bottom of the frame with **T:** preceding it, with T indicating 'Template.'



Apply the Same Product Template to all Frames on a Page

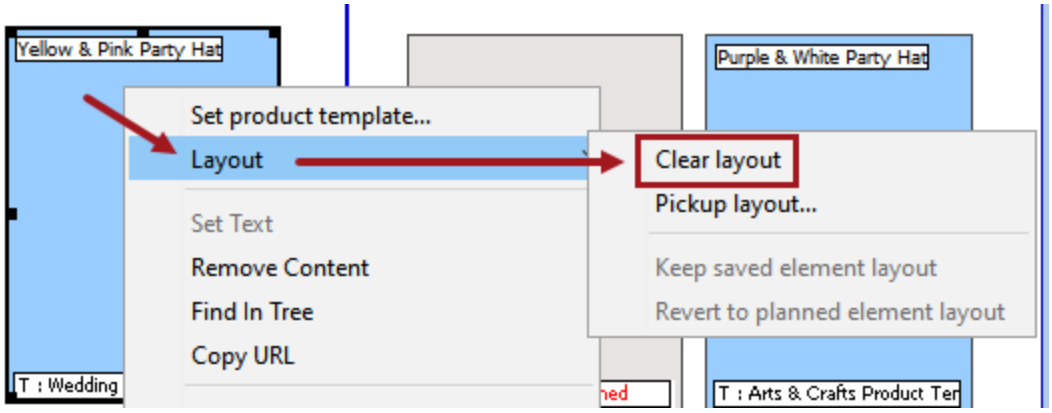
It is also possible to add the same product template to all page frames in a single action.

1. Select a page, then right-click in any white area and choose Layout > **Set all product templates**.
2. Select the desired template from the list of available templates in the **Choose a Product Template** dialog, then click **OK**.
3. The same product template will be applied to all frames on the selected page.

Remove a Product Template

To remove an assigned product template from a frame:

1. Right-click on the frame, then select **Clear layout**.



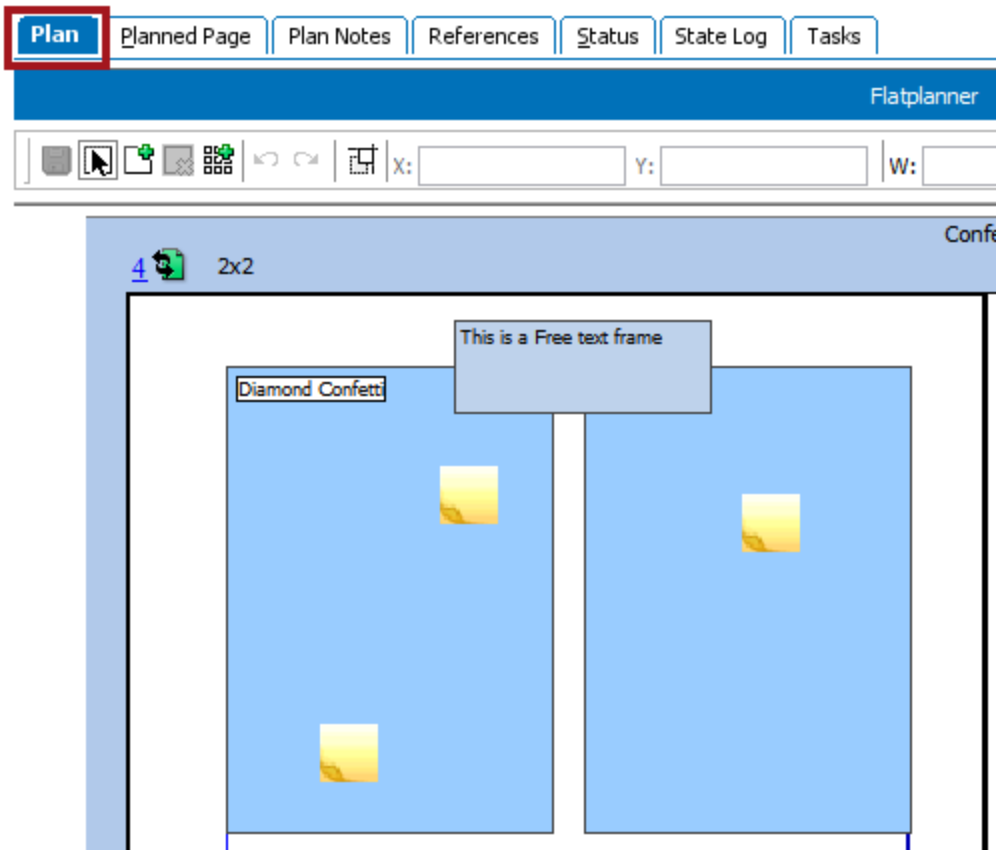
2. The template is removed from the frame.

Adding Notes and Free Text

Notes and free text can be added directly to planned pages (spreads) from the **Plan** tab. Notes and free text are useful, for example, if there is a need to communicate with an art director or designer about the pages. Users who perform all of their tasks in the workbench, such as merchandisers, can leave notes on planned pages that will be seen by DTP operators when they mount the pages in InDesign.

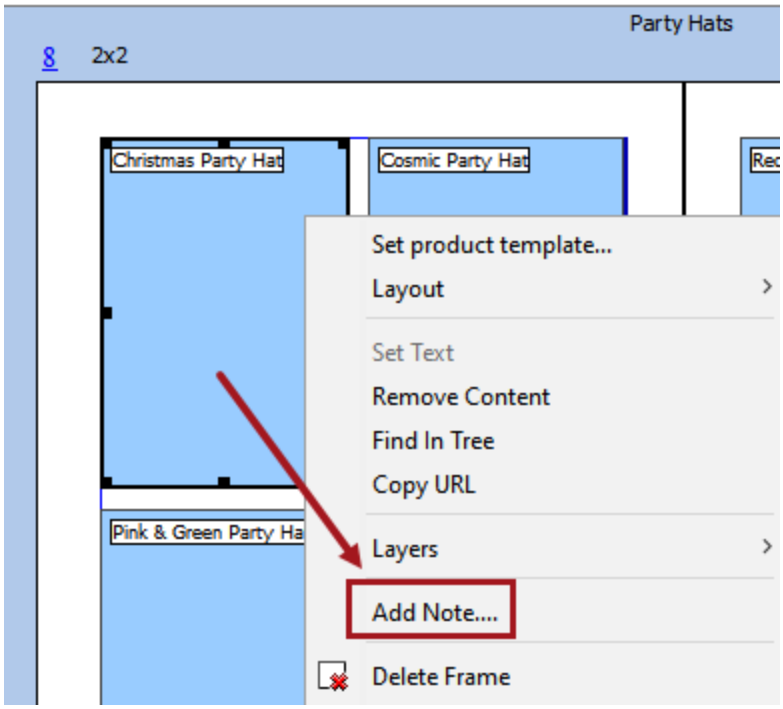
Notes can be added to planned page spreads in the **Plan** view and **Preview** view. They cannot be added in the **Sticker Book** view.

Notes can also be added to **actual pages** in the workbench, from the **Mounted Pages** view of the Flatplanner and the **Notes** and **Details** tabs when viewing an actual page selected in the Tree. See the last subsection of this topic, 'Adding Notes and Free Text to Actual Pages, for more information.

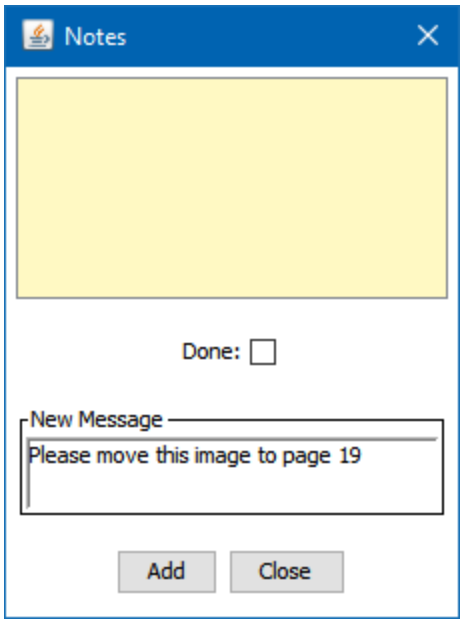


Add a Note to a Planned Page

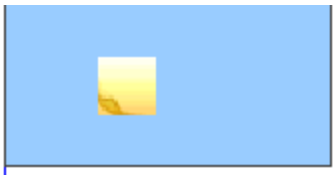
1. In the **Tree**, expand the **Publication** hierarchy, and then click the relevant spread.
2. Click the **Plan** tab.
3. Right-click a frame or the white area of the spread, and then click **Add Note**.



4. In the 'Notes' dialog, enter text in the **New Message** field.



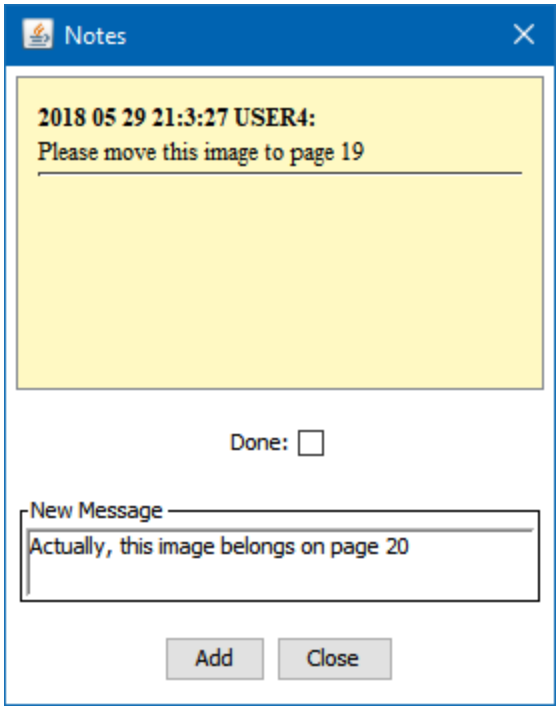
5. Click **Add** to add the text to the note, then click **Close**.
6. The note is now visible in the Plan view as a small yellow square that resembles a physical sticky note.



Edit and Delete Notes

1. To **edit** a note, double-click on the relevant note and add text in the **New Message** field.

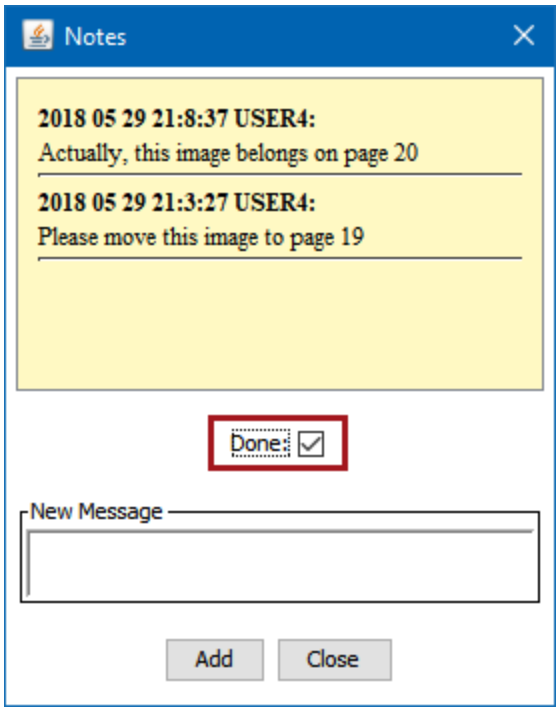
> **Note:** Existing text in notes cannot be edited; only new information can be added.



2. Click **Add** to add the new text to the note, then click **Close**.
3. To **delete** a note, right-click the relevant note, and then click **Delete Note**.

> **Note:** Notes cannot be deleted in the **Preview** view.

4. Instead of deleting a note, you may also mark it as **Done**. This allows you to keep the note while letting other users know that no further action needs to be taken.

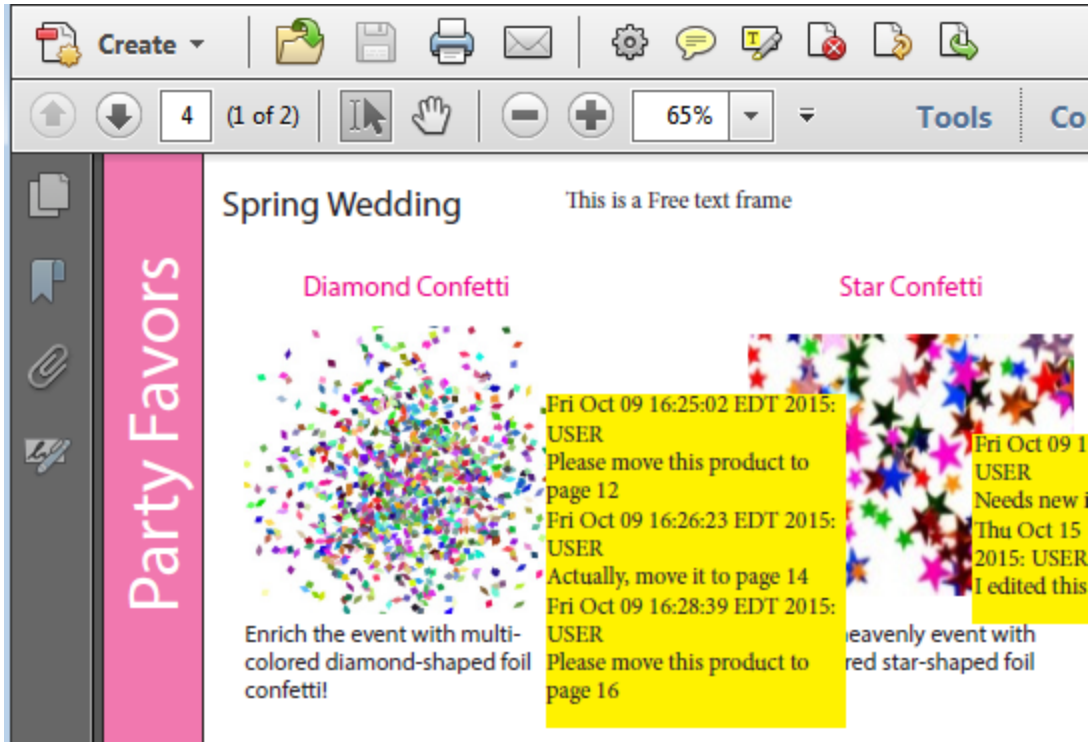


Viewing Notes

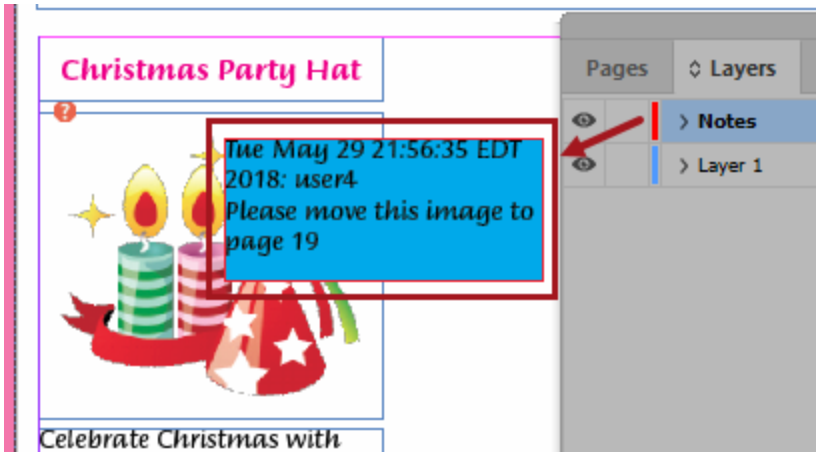
Notes can be viewed in numerous places within the workbench, from generated PDFs, and from within InDesign. The following list describes some ways in which notes can be viewed. To get a view of all notes in one place, see the **Plan Notes** tab, detailed in the next subsection ('Using the Plan Notes Tab').

1. In the **Preview** view, both the notes 'icon' and the note text is visible, though the note icon obscures some of the note text. Double-click the note icon to view the entire text of the note in the 'Notes' dialog.

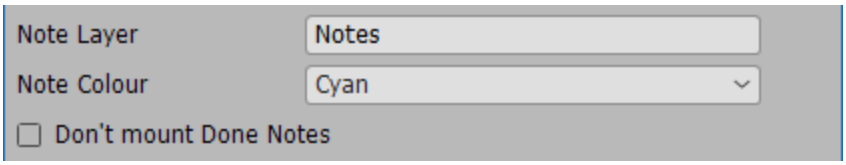
2. **PDFs** generated from planned pages will display notes unobscured by a note icon.



3. In **InDesign**, notes are mounted onto pages in a special layer that is named 'Notes' by default.



The name of the Notes layer and the appearance of mounted notes is controlled by three settings in the STEP Publisher **Preferences** menu. The text of the note will use the paragraph style set as Basic Paragraph in the publication template or mounting page. For more information on this menu, see **Configuring the STEP Preferences Menu** topic in the **STEP Publisher** documentation.



- **Note Layer:** By default, the layer is named Notes, but it can be given any name.
- **Note Colour:** Specifies the background shading color for mounted notes.
- **Don't mount Done Notes:** Check this box to prevent any Flatplanner Notes marked 'Done' from mounting on the InDesign page.

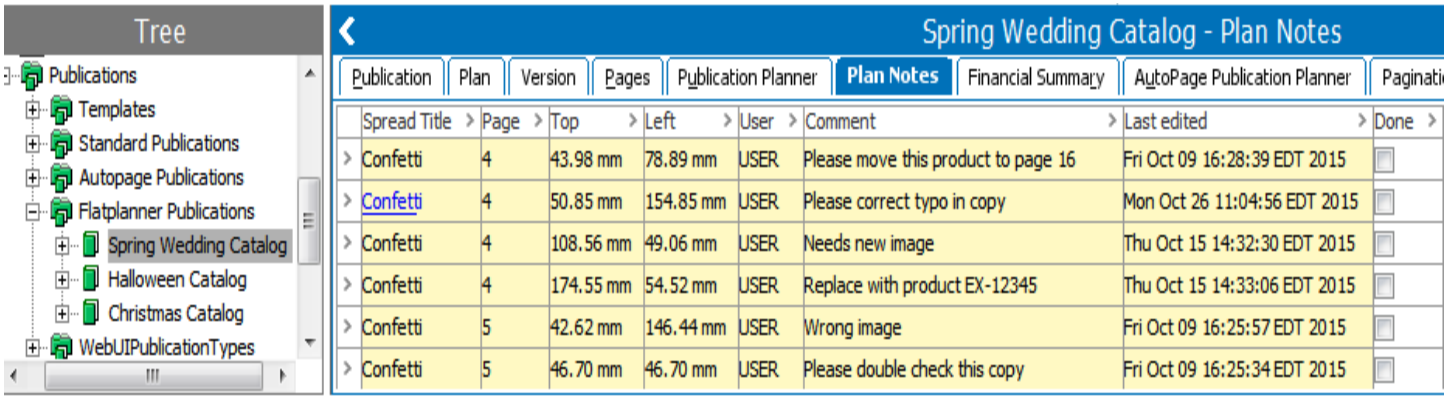
Using the Plan Notes Tab

The **Plan Notes** tab enables the viewing, editing, and deletion of all planned page notes in one location. This tab is accessible from the publication, section, and planned page level of publications. You can access all notes in a publication from the publication level; all notes in a section from the section level; and all notes in a spread from the planned page level.

Edits made to notes from the Plan Notes tab will be reflected in the notes attached to the Flatplan. Likewise, edits made to notes on the Flatplan will be reflected on the Plan Notes tab.

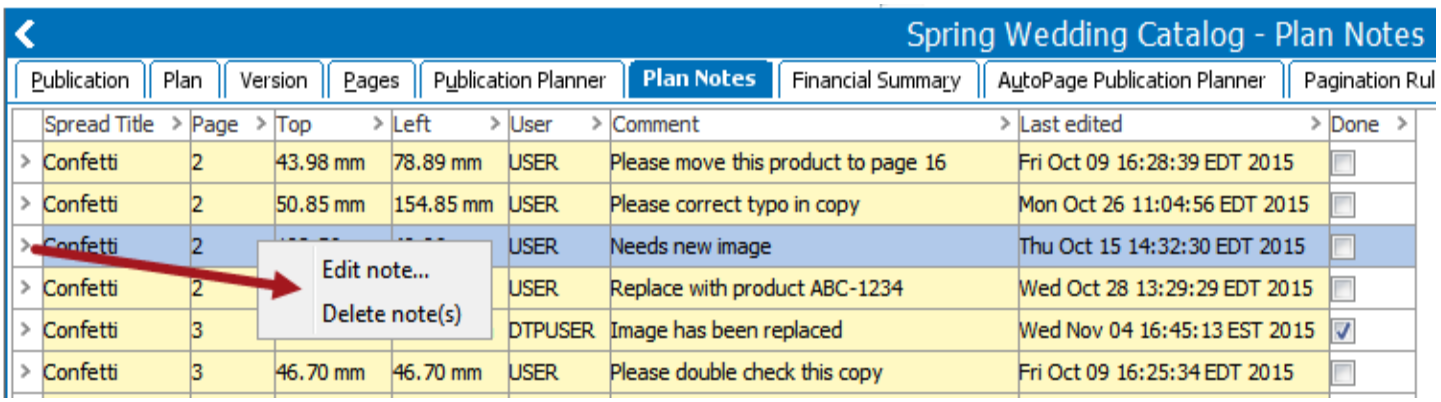
Editing notes on this tab is similar to editing notes on Flatplan frames—new text can be added, but existing text cannot be edited. The Plan Notes tab will always display the most recent notes text.

Note: Notes cannot be *added* to planned pages from the Plan Notes tab, as there is no way to position them on the page. Notes can only be added via a right-click action on page spreads.



Edit or Delete Notes From the Plan Notes Tab

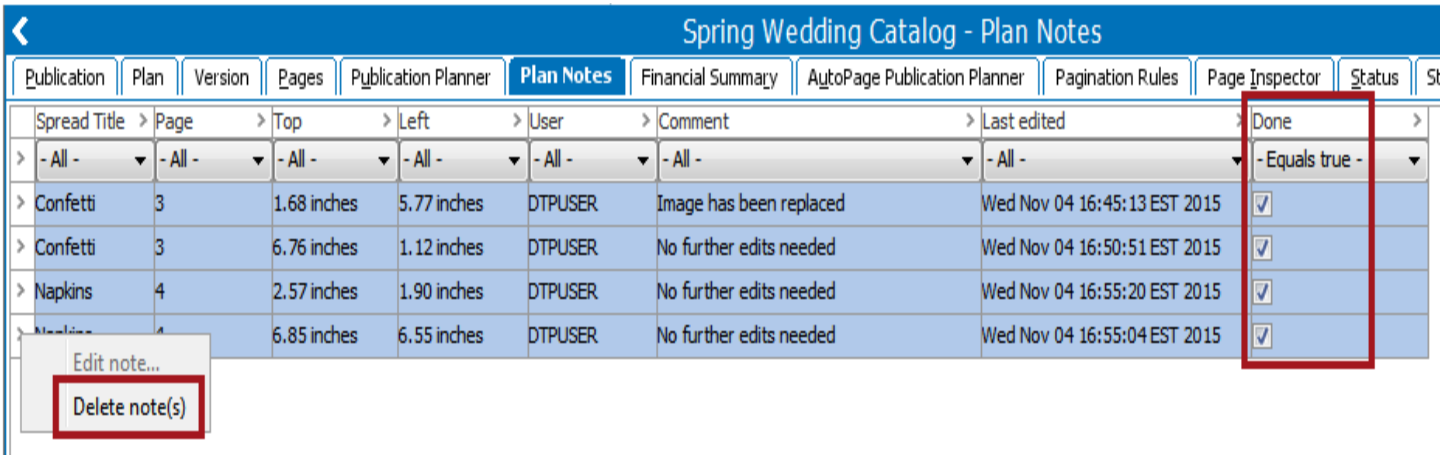
1. Select the note that you would like to edit or delete by left- or right-clicking on the small gray arrow at the beginning of the row.
2. In the popup menu, choose 'Edit note...' or 'Delete note(s)'. Multiple notes may deleted at once if multiselected.



Sorting and Filtering Notes

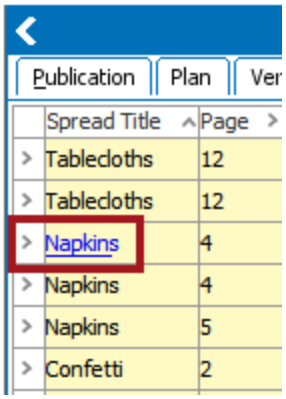
Notes can also be sorted and filtered on the Plan Notes tab. Example use cases include:

- The placement of notes throughout a publication can be determined by filtering on Spread Title, then further pinpointed by sorting on 'Left' and 'Top' (X / Y) coordinates.
- All notes that are marked as 'Done' can be identified by filtering the Done column on 'true'. The notes can then be multiselected and deleted.



Navigation to Spreads

Spread titles are hyperlinked in the 'Spread Title' column. Click on a hyperlink to navigate directly to the Planned Page.



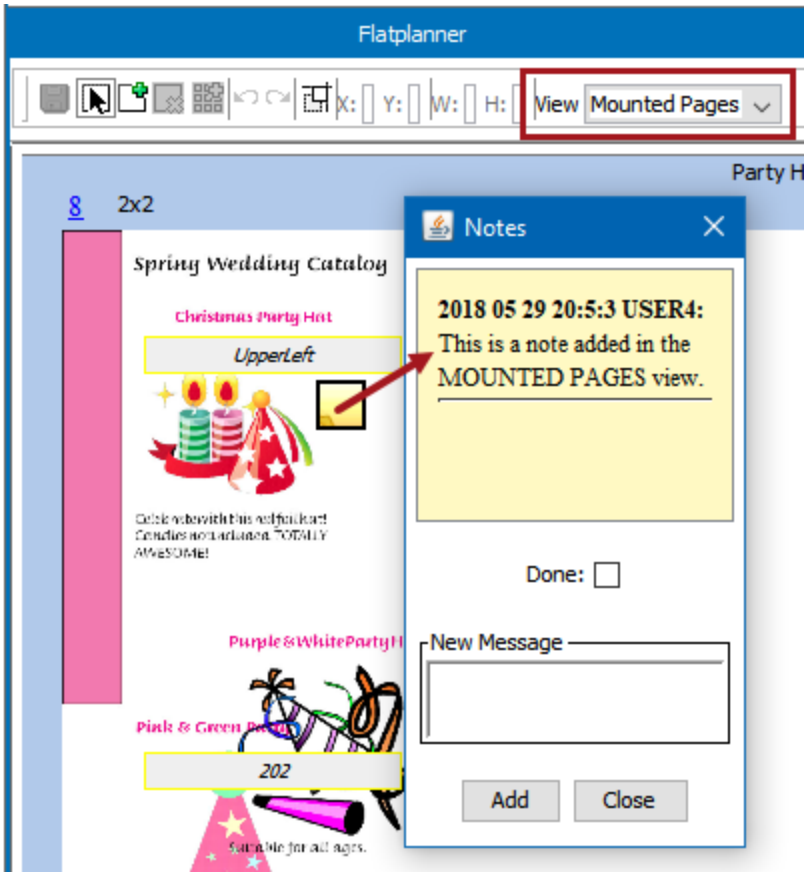
Add Notes to Actual Pages

Notes can be added to **actual pages** in the workbench, from the **Mounted Pages** view of the Flatplanner and from the **Details** and **Notes** tabs when viewing an actual page selected in the Tree.

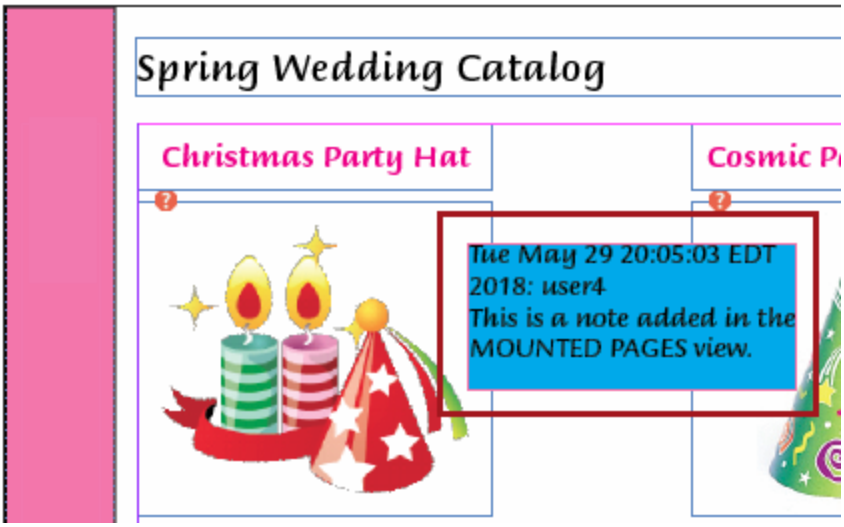
Note: Notes added to actual pages are not visible on planned pages in the Plan, Preview, or Sticker Book views, nor are they visible on the Plan Notes tab. However, these notes will display on mounted InDesign pages. As such, they are primarily intended for viewing by DTP operators who do all of their work from within InDesign.

Add Notes to an Actual Page in the Mounted Pages View

To add a note to an actual page in the Mounted Pages view, follow the same steps that you would to add a note to a regular planned page, outlined in the 'Add a Note to a Planned Page' subsection above.



The note is visible on the mounted InDesign page.



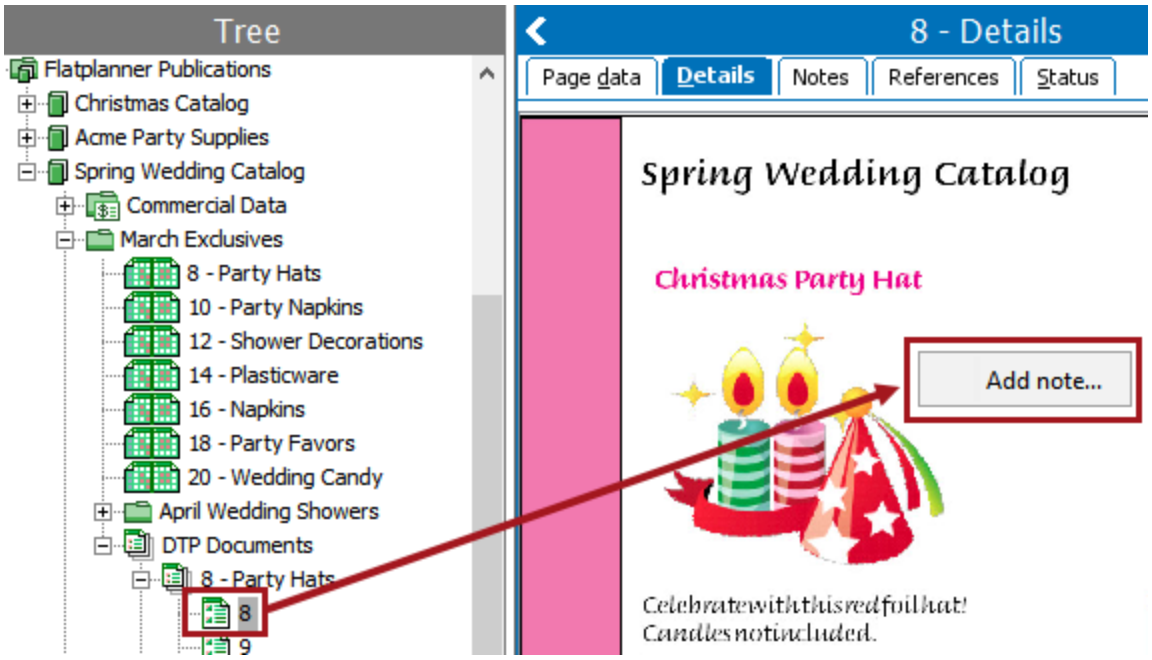
Add Notes to an Actual Page Selected in the Tree

When viewing an actual page (InDesign page) in the workbench, notes can be added to the page from the **Details** and **Notes** tabs. Just like when adding a note to an actual page in the Mounted Pages view, the notes will be visible on mounted InDesign pages but not in the Plan view, Sticker Book view, or on the Plan Notes tab.

Details tab

To add a note from the Details tab of an actual page:

1. Navigate to the desired actual page in the Tree, then click on the **Details** tab.
2. Right-click on the page and select **Add Note**.

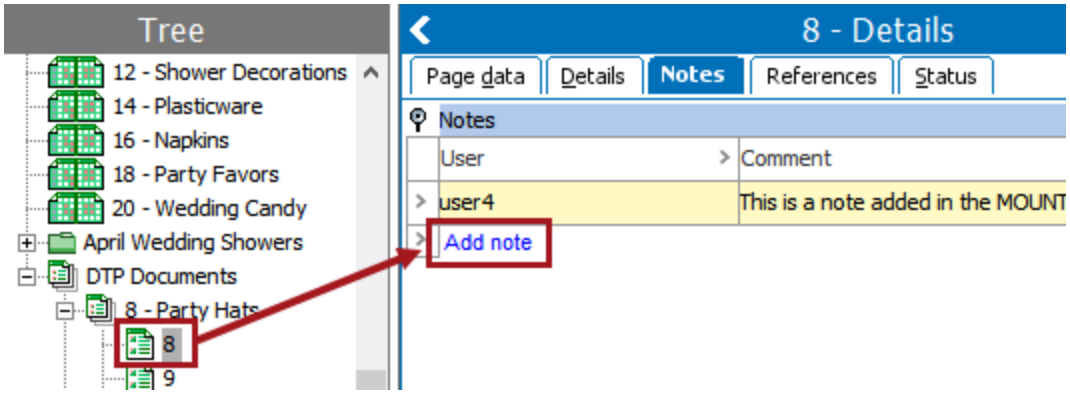


3. Type a message for the note, then click **Add** to add the text. Click **Close** to finish adding the note.

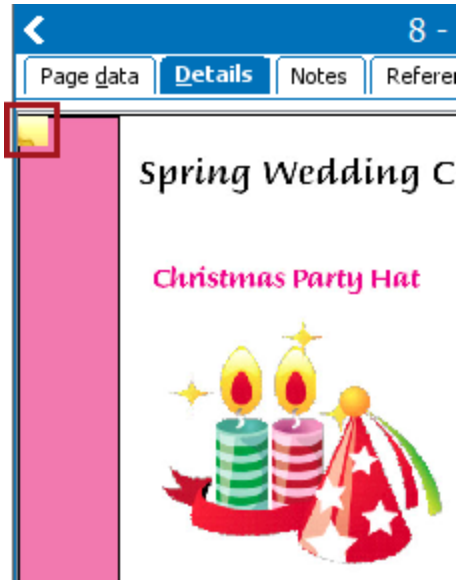
Notes tab

To add a note from the Notes tab of an actual page:

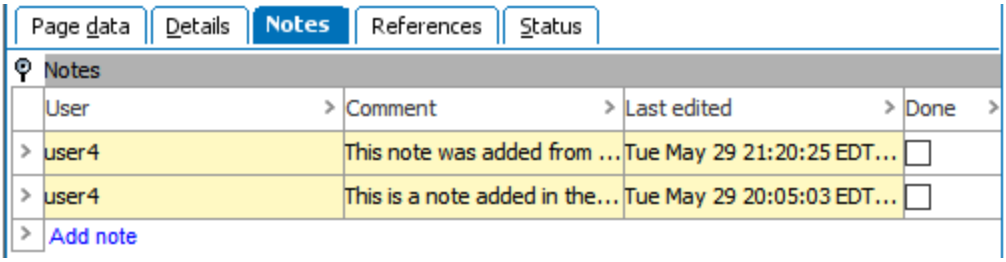
1. Navigate to the desired actual page in the Tree, then click on the **Notes** tab.
2. Click **Add Note**.



3. Type a message for the note, then click **Add** to add the text. Click **Close** to finish adding the note.
4. The note will be visible in the upper left corner of the page when viewed from the **Details** tab.



5. An overview of all notes attached to the actual page can also be viewed from the **Notes** tab. Notes can be added, deleted, and marked as Done from this tab, but they cannot be edited.

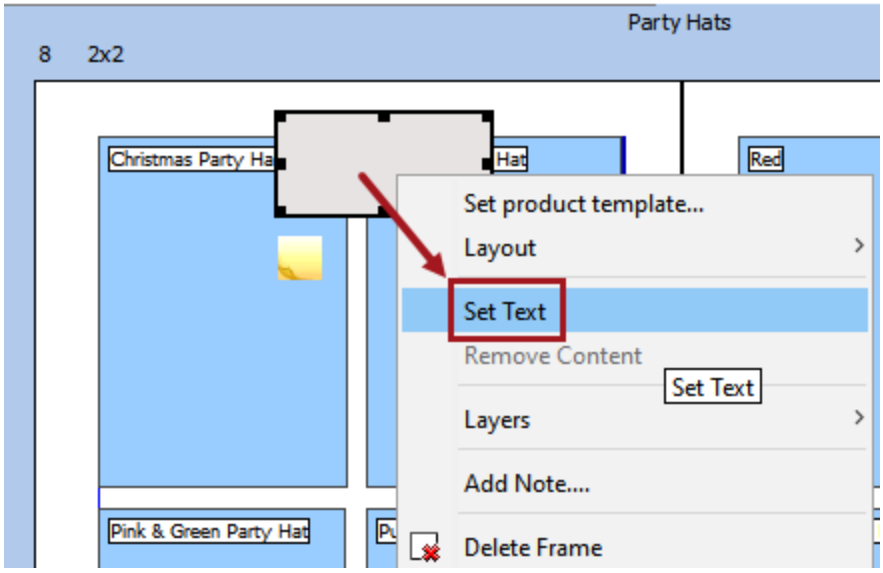


Add Free Text to a Frame on a Planned Page

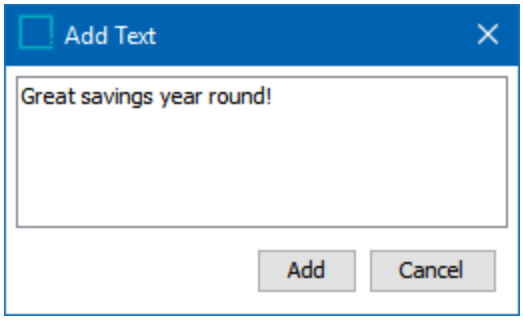
Free text can be added to empty frames on a planned page. However, once free text is added a frame, products cannot be linked to these frames that contain free text.

Note: Though notes can be added to planned pages in both the Plan view and the Preview view, free text can be added in the Plan view only.

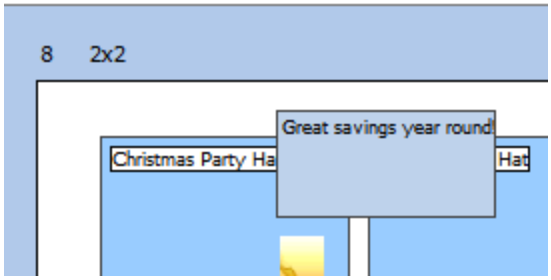
1. In the **Tree**, expand the **Publication** hierarchy, and then click the relevant spread.
2. Click the **Plan** tab.
3. Right-click the frame that should have free text added and select **Set Text**. If the frame does not already exist, then add it using the 'Add Frame' tool.



4. Enter text in the 'Add Text' dialog, then click **Add**.



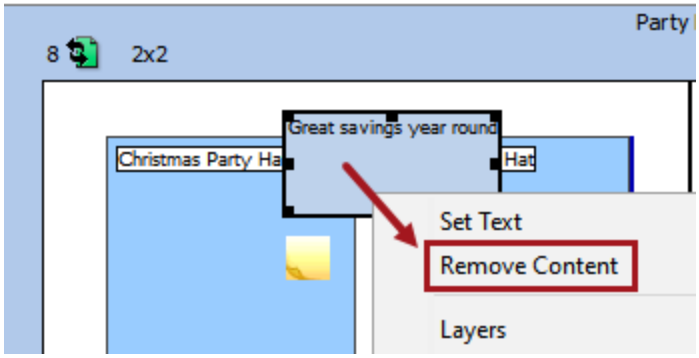
5. The text appears in the frame.



6. In InDesign, the free text frame will mount in a text frame using the Basic Paragraph style specified in the publication template. Additional styling can be added manually to this frame by the DTP operator.

Edit and Delete Free Text

1. To **edit** free text, follow the same steps as you would to add free text.
2. To **delete** free text, right-click the free text frame and select **Remove Content**.



Reusing Saved Layouts

When a document has been finalized in InDesign and saved back to STEP, its layout can be reused on other pages, either within the same publication or in another. This is useful for pages that may appear identically in various publications across different seasonal publication cycles or business divisions.

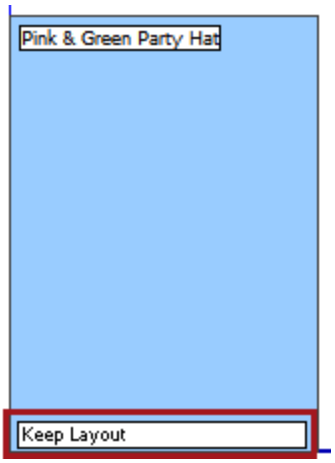
There are two ways to reuse layouts:

- Keep the finalized layout of the actual page that matches the planned page.
- Use the layout of a different page that has been saved back to STEP.

Keep the Saved Layout of an Actual Page

When a finalized InDesign document has been saved back to STEP, the finalized layouts are now the layout of the planned pages. I.e., instead of product templates defining the layout, the actual pages are now linked to the plans, and the layout originally defined for the planned pages is overridden.

To determine if an object uses a saved layout, select **Plan** view, and then **Show Product Templates** view. 'Keep Layout' is displayed at the bottom of the frame instead of the name of the product template.



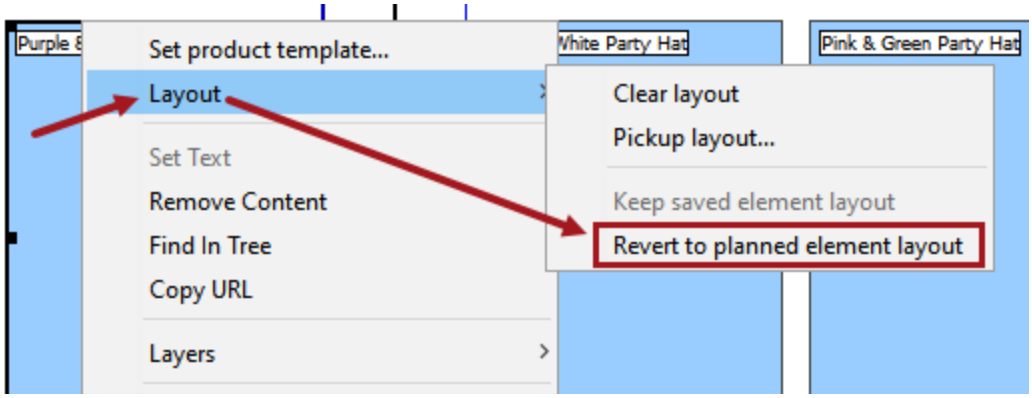
You can revert to the old layout of the planned pages because the old layout rules are overridden but not deleted.

Note: STEP will not keep layouts unless the system setting **Enable keep layouts for publications** is set to **Y** under System Setup > Users and Groups > Flatplanner Default Settings. For information on this setting, see the **Flatplanner Default Settings** topic in the **System Setup / Super User Guide** documentation.

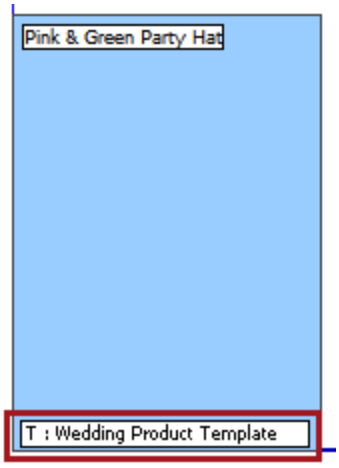
To Revert to the Planned Layout

To revert to the original layout from the plan, follow these steps. These instructions describe the method for reverting to a layout for an individual frame, but the same process can be followed for *all* frames on a page by right-clicking in the white area of any planned page.

1. Right-click on the frame from which you want to remove the actual page layout, then select Layout > **Revert to Planned Element Layout**.



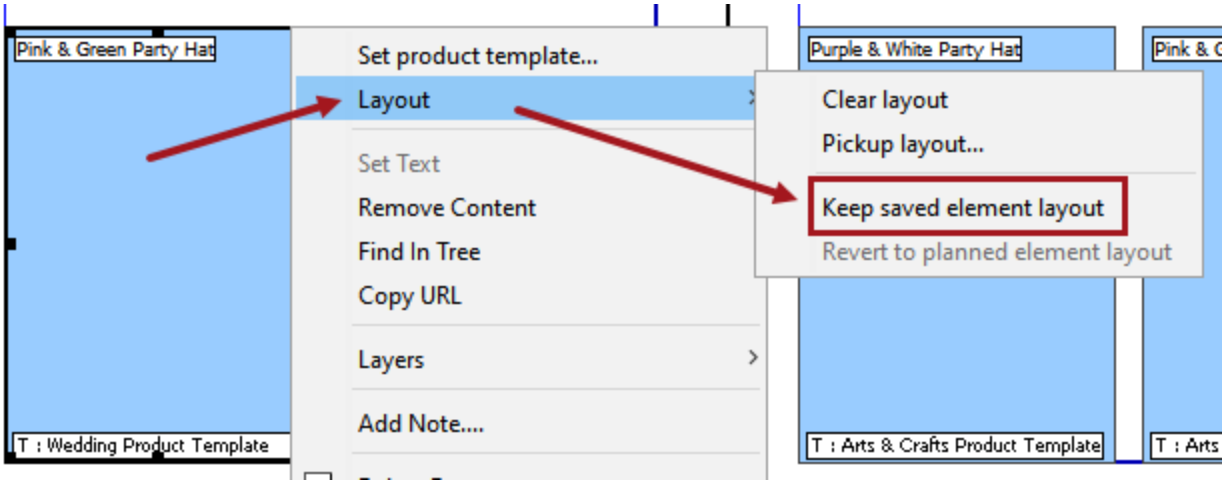
2. The name of the original product template, preceded by the letter **T:**, now displays on the frame instead of 'Keep Layout.'



To Switch Back to the Saved Layout

To switch back to the saved layout, follow these steps. These instructions describe the method for keeping a saved layout for an individual frame, but the same process can be followed for *all* frames on a page by right-clicking in the white area of any planned page.

1. Right-click on the frame and select Layout > **Keep Saved Element Layout**.



2. The layout reverts back to that of the actual page, and 'Keep Layout' displays again on the frame.

Reuse a Saved Page Layout

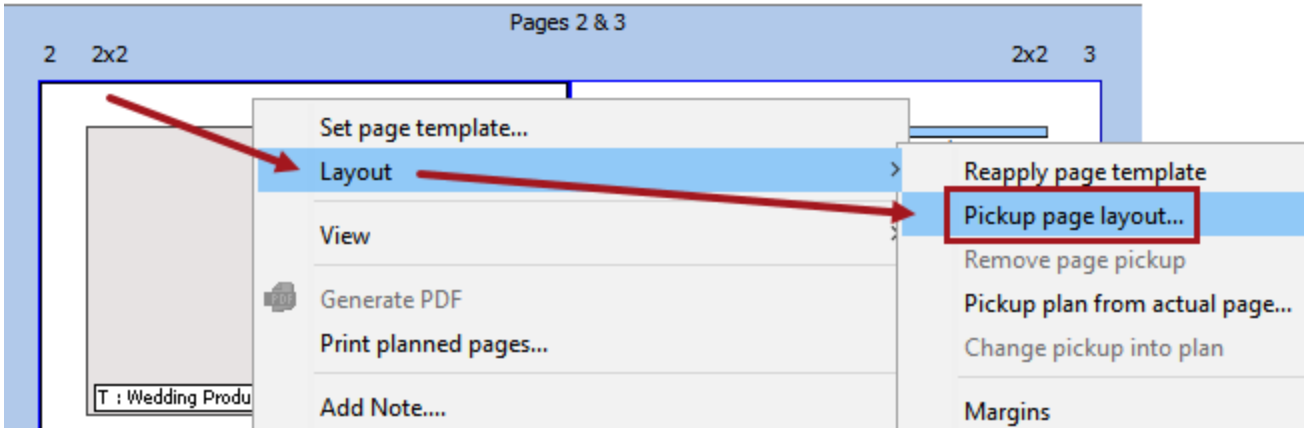
You can reuse layouts from all publications that have been saved back to STEP after having been finalized in InDesign. This is called Pickup Layout. You can pick up both product and page layouts.

Finalized documents are located in the tree in a node called DTP Documents under the associated publication.

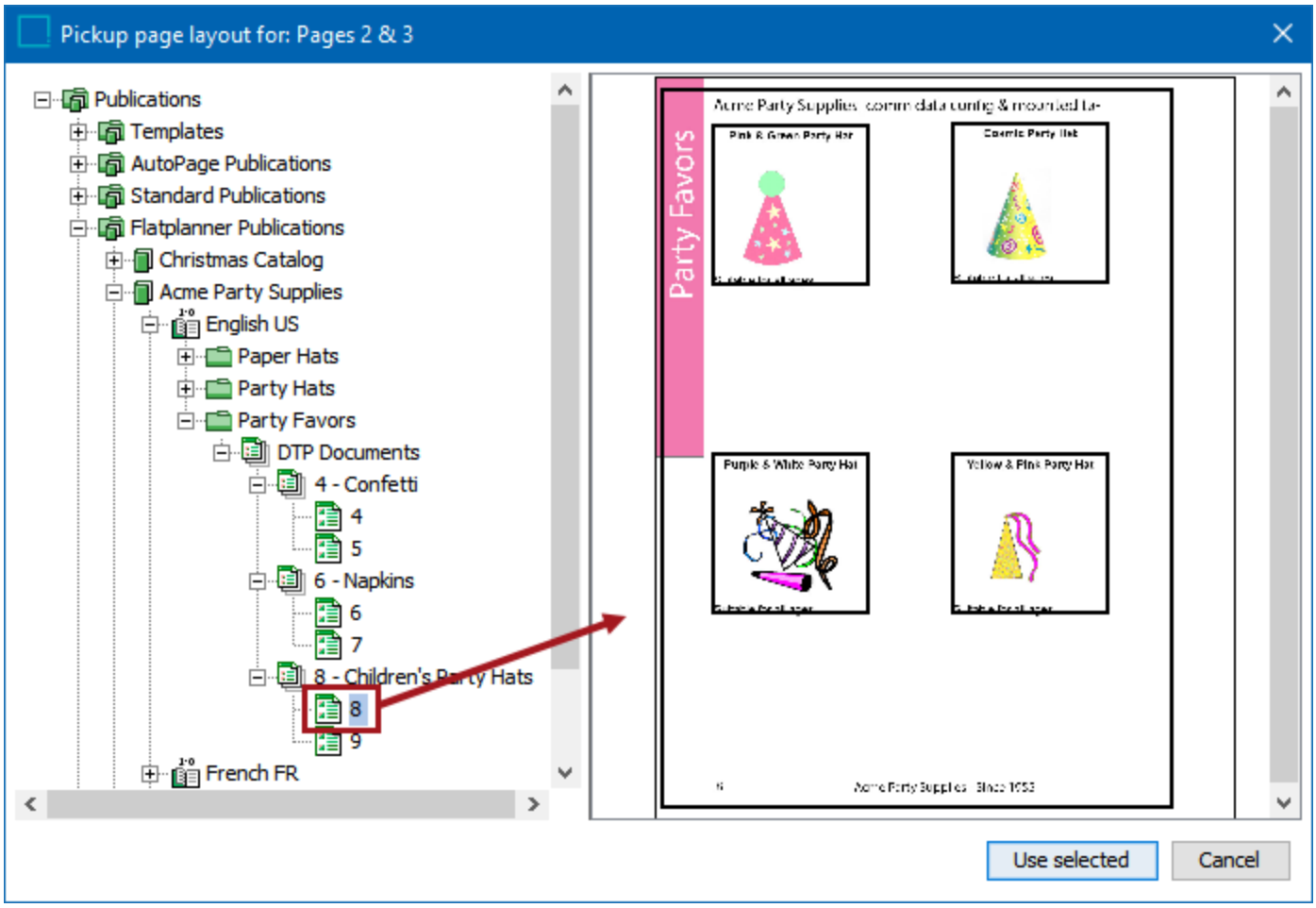
To Pickup a Saved Page Layout

To pickup a layout for an entire page:

1. On the plan, select a page, then right-click and select Layout > **Pickup Page Layout**.

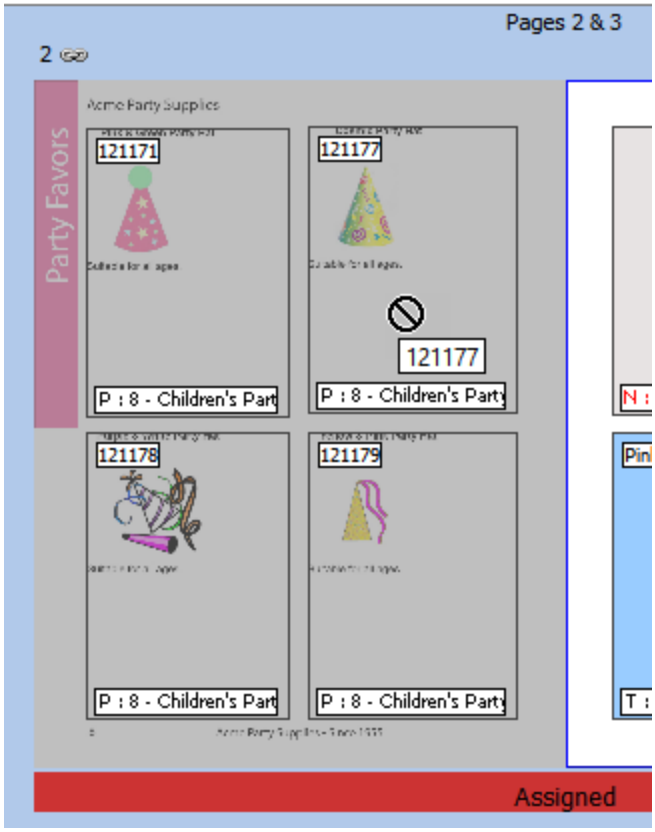


2. In the **Pickup page layout** dialog, navigate to the actual page from which you would like to pick up the layout. A preview of the selected page displays.



3. Click **Use Selected** to apply the layout to the planned page.
4. The planned page now displays with a gray-shaded background and cannot be edited.

> **Note:** To display frame information on the picked-up page—such as the product ID, Frame ID, and 'product template' layout indicator—the 'Show frame information on flatplans with layout pickup' system setting must be set to **Y**. For information on this setting, see the **Flatplanner Default Settings** topic in the **System Setup / Super User Guide** documentation.



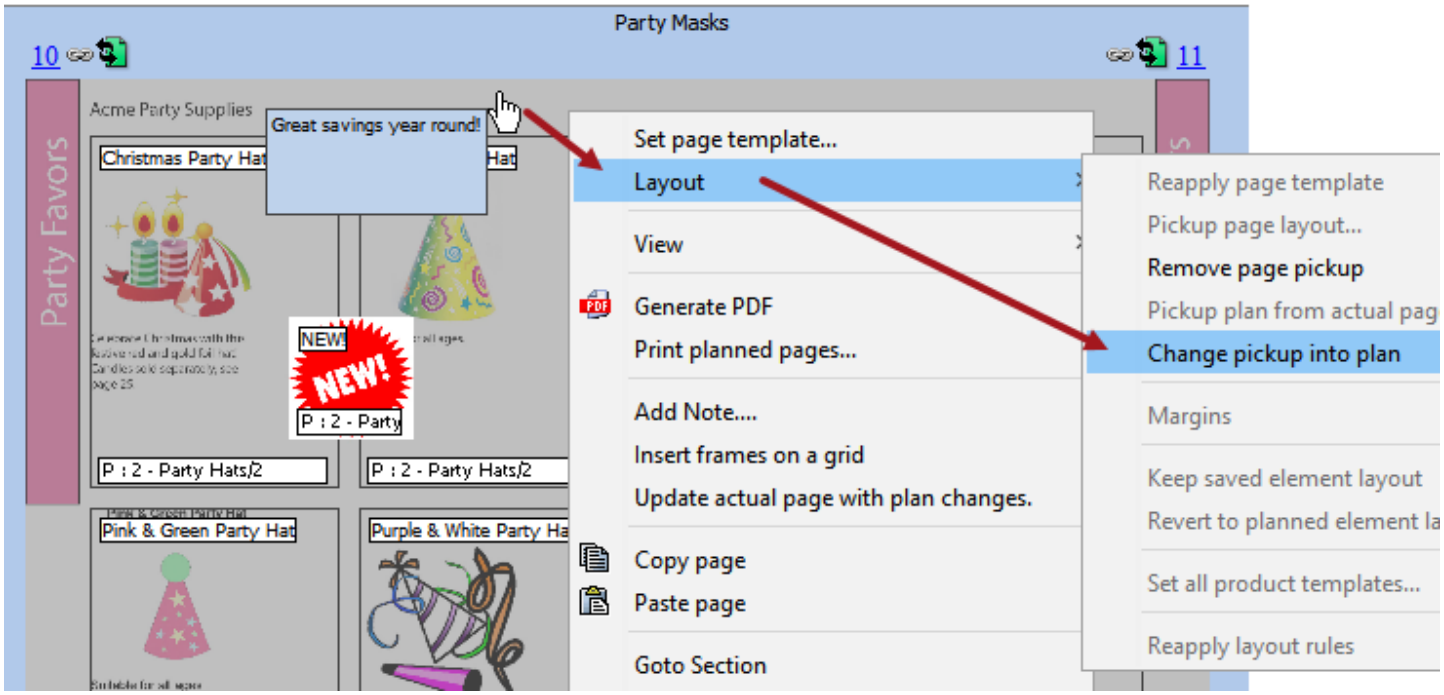
5. To **remove** the picked-up layout, right-click on the page in a non-frame area, then choose Layout > **Remove page pickup**. The picked up layout will be removed from the page.

Change a Picked-up Layout to a Plan

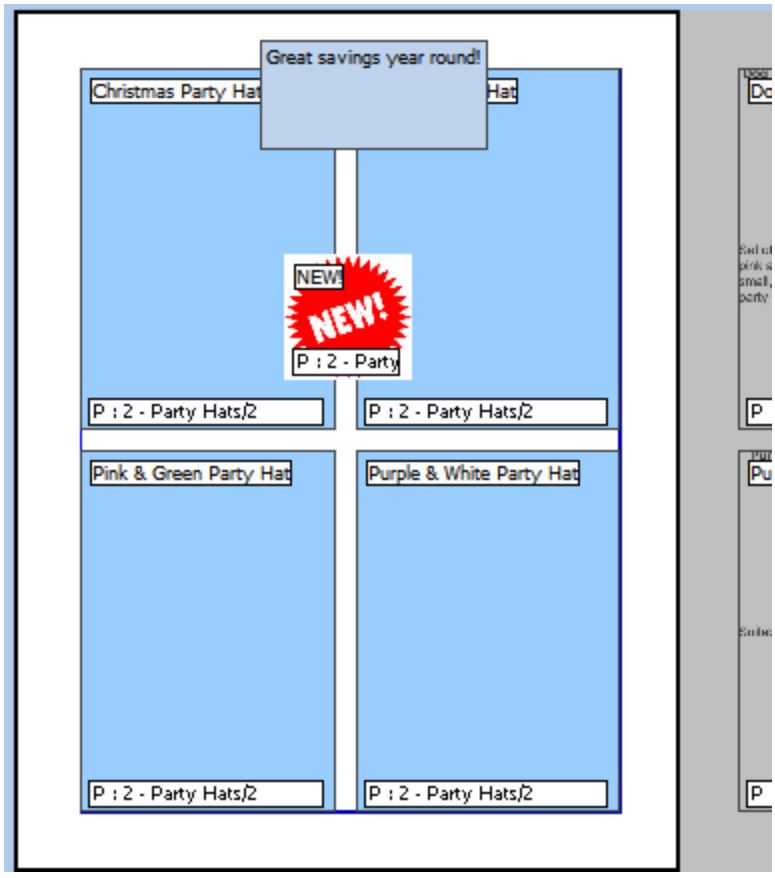
You may want to change a picked-up layout into a plan if you like the overall layout of the page but want the ability to edit the page again as if it were a new Flatplan page.

To do so, follow these steps.

1. Right-click on the picked-up page outside of any frames, then select Layout > **Change pickup into plan.**



2. The page reverts to a plan, but still 'remembers' where the layout was picked up from, as shown in the product template layout indicator at the bottom of each frame, e.g., 'P : 2 - Party Hats/2.'

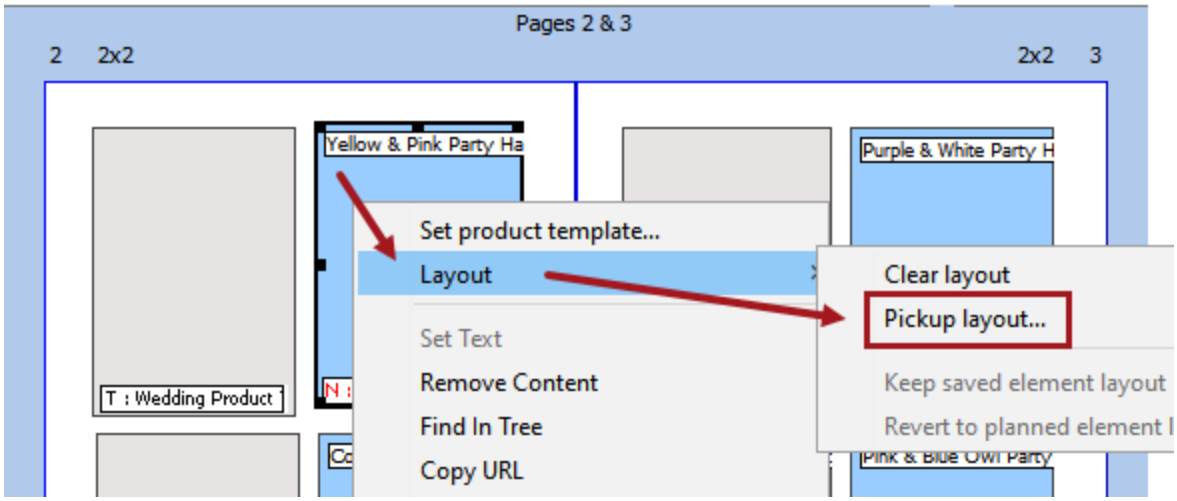


Pick up a Saved Product Layout for a Single Frame

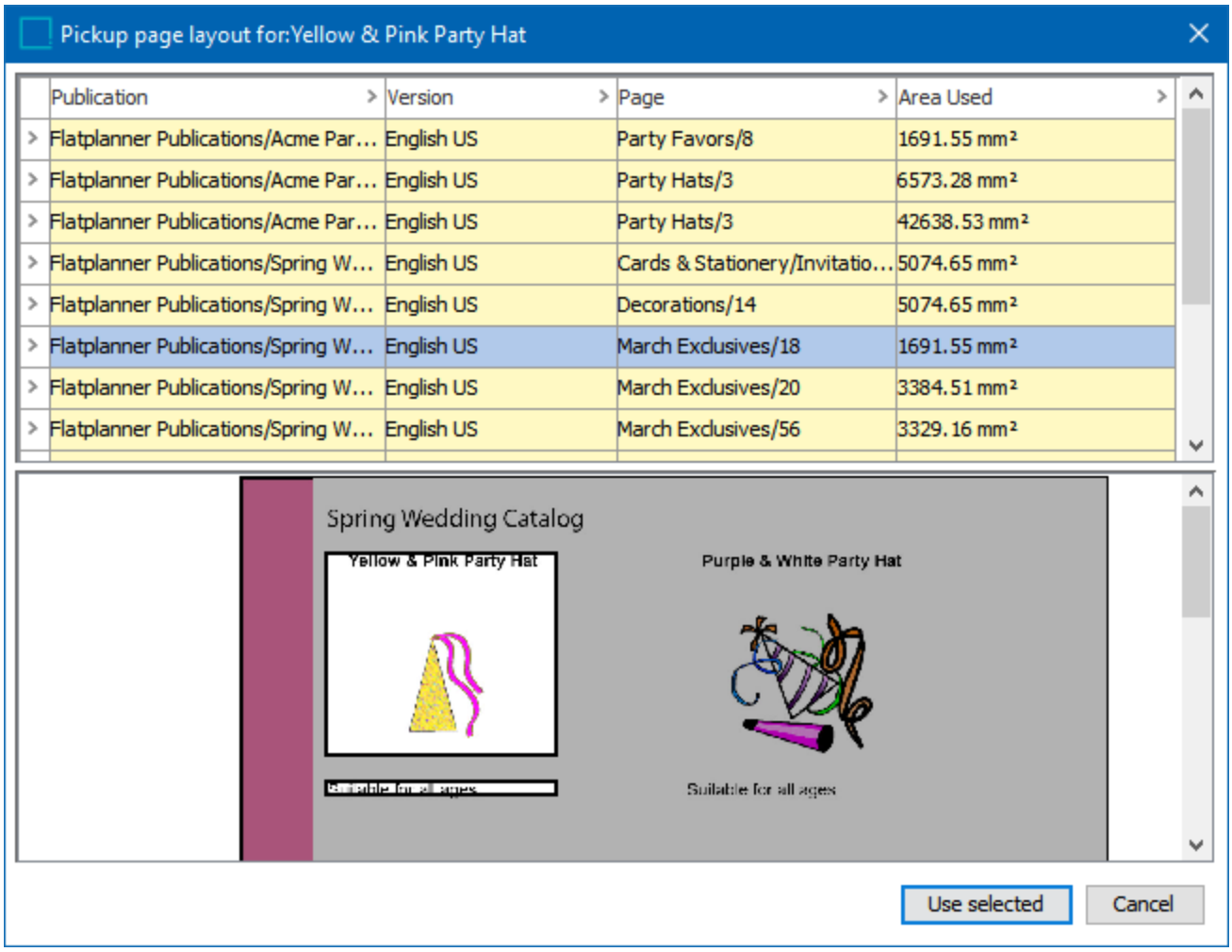
To pick up a layout for a single frame:

1. On the plan, right-click the frame to which you want to apply the saved layout, then select Layout > **Pickup layout**.

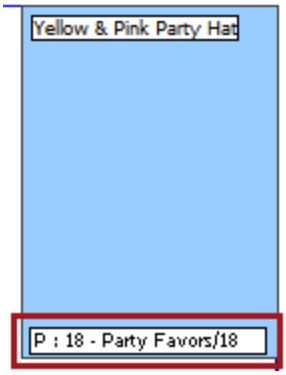
   Note: An object must be linked to the frame before a layout can be picked up, since the system is looking for other pages on which the same object has already been mounted.



2. In the **Pickup page layout** dialog, a list of actual pages displays that the object has been previously mounted to. Select a row to see a preview of how the object appears on the selected page.



3. Click **Use Selected** to apply the layout to the object.
4. In the 'product templates' box on the frame, instead of a template name, the letter P now displays, along with the name of the page from which the layout was picked up.



5. To **remove** the picked-up layout, right-click on the frame and select Layout > **Clear layout**.

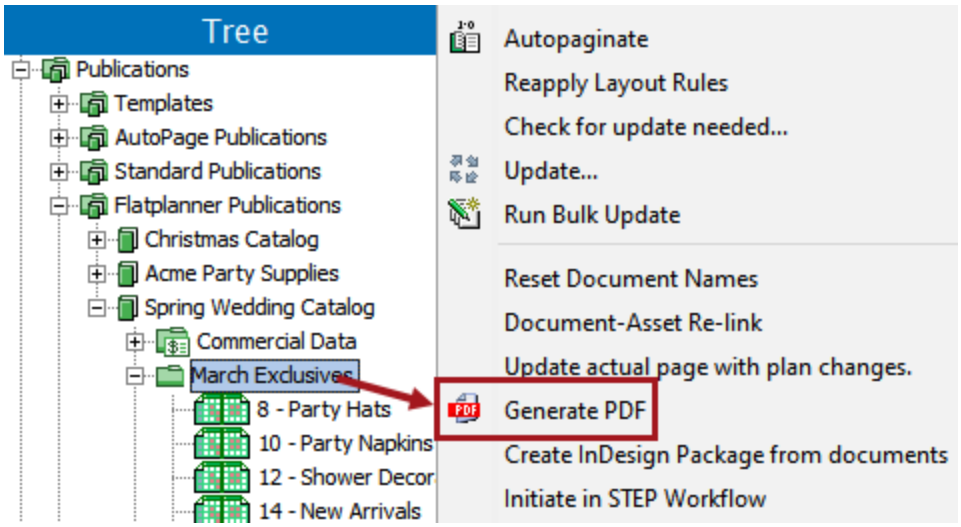
Generating PDFs in Flatplanner

After planning some pages in the Publication Planner and Flatplanner, you can generate PDF proofs of the planned pages to ensure that they look the way you want them to. Multiple pages can be proofed at once by generating a PDF from a publication or section, or PDFs can be generated one spread at a time.

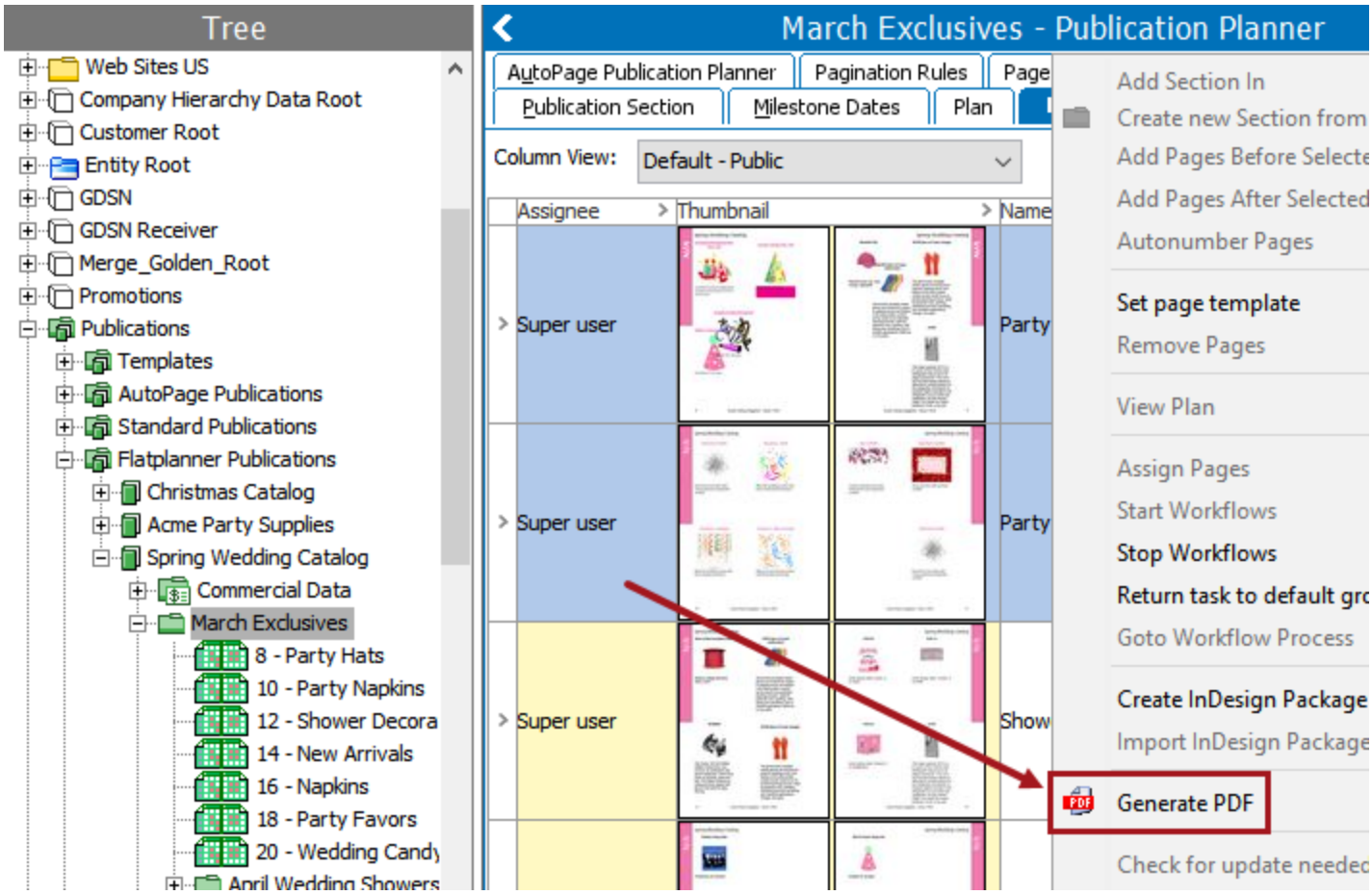
You can also generate a PDF that only includes pages that have already been completed in InDesign and saved back to STEP (actual pages).

Generate a PDF from a Publication or Section

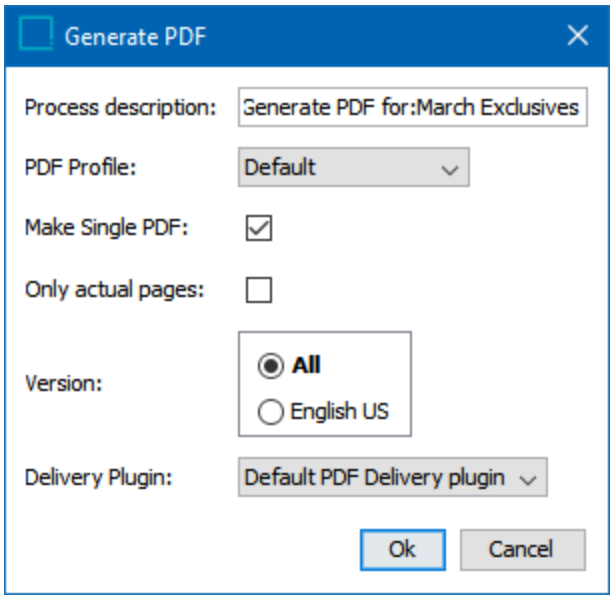
1. In the **Tree**, navigate to the relevant publication or section, then right-click and select **Generate PDF**.



Or, from the **Publication Planner**, select and right-click the preferred row(s), then choose **Generate PDF**. Multiple rows can be selected by pressing the Ctrl or Shift key while making selections.



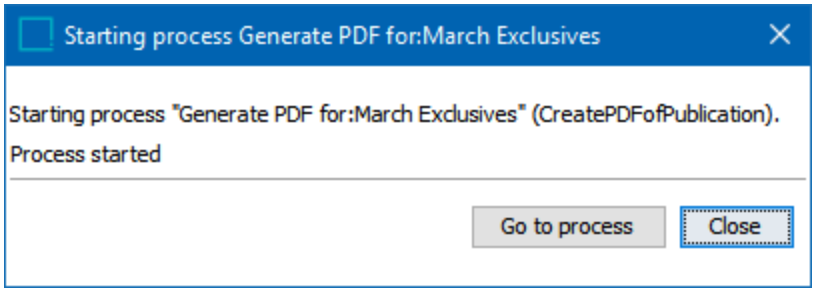
2. In the **Generate PDF** dialog, select the preferred profile from the **PDF Profile** dropdown list. Since PDF profiles are system dependent, the PDF profile is set to 'Default' if no special PDF profiles have been configured for the system. For information on how to create and store custom PDF profiles in STEP, see the **Setting up PDF Profiles (Presets) for the InDesign Server** topic in the **STEP Publisher** documentation.



3. Check **Make single PDF** to include all documents in a single PDF file. If not selected, the resulting PDFs will be delivered as individual PDFs within a .ZIP file.
4. Check **Only actual pages** to only generate PDFs of the actual pages saved back to the publication and to not generate PDFs from planned pages.
5. Select the publication **Version** that you would like to generate PDFs from.

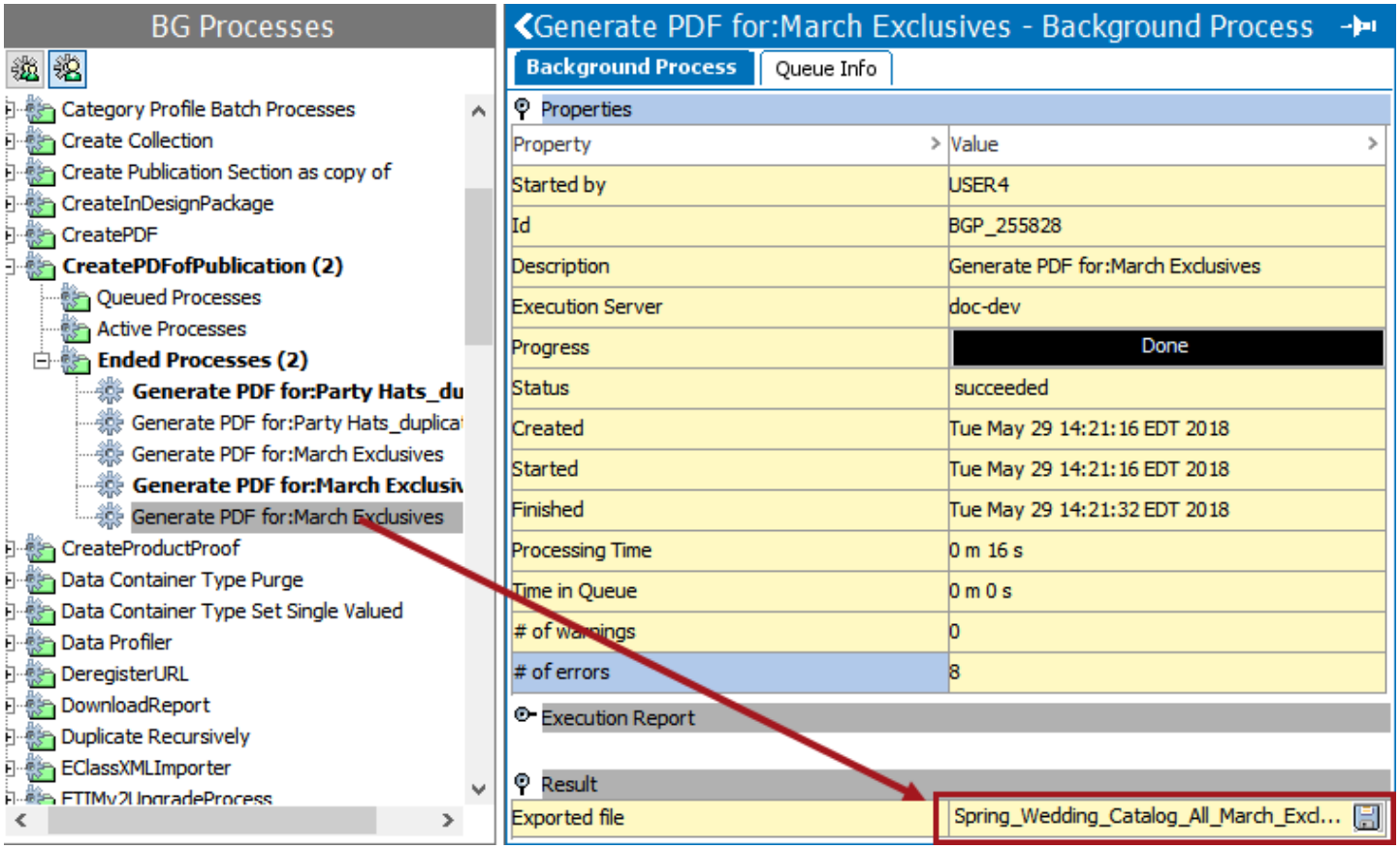
> **Note:** Selecting 'All' for 'Version' does not automatically generate a layered PDF; all publication versions are embedded in a single layer within the PDF unless a special PDF profile has been configured. For information on how to create and store custom PDF profiles in STEP, see the **Setting up PDF Profiles (Presets) for the InDesign Server** topic in the **STEP Publisher** documentation.

6. Select the relevant **Delivery Plugin**. By default, this is' Default PDF Delivery plugin.'
7. Click **OK** to start the **Generate PDF** background process. Click **Go to process** to go to the BG Processes tab, or, click **Close** to exit the dialog.

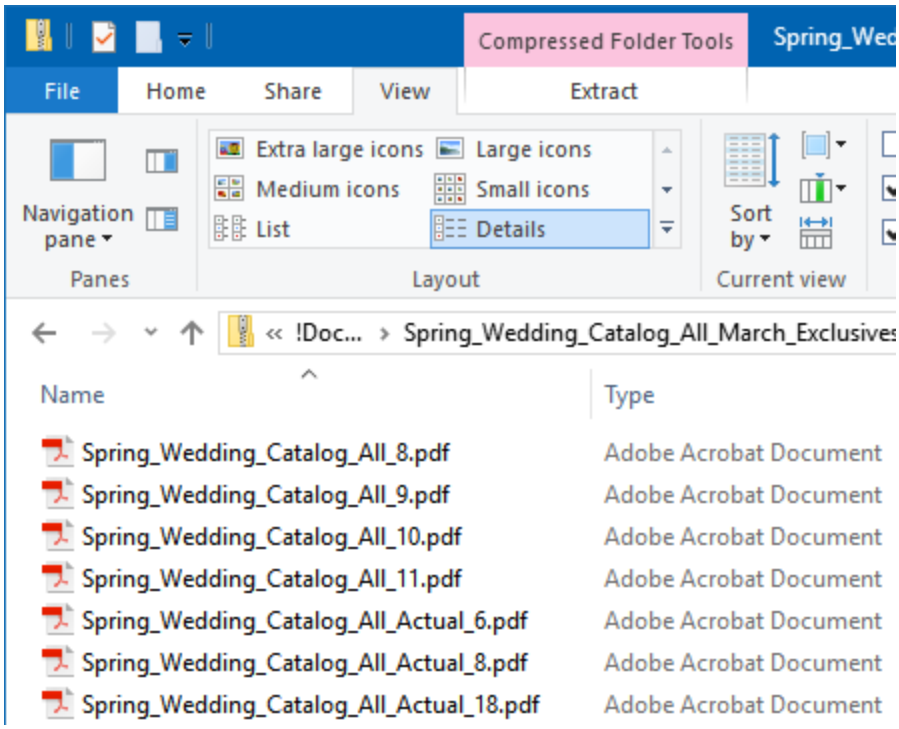


8. The process occurs and the resulting file is delivered under the 'CreatePDFofPublication' node on the BG Processes tab. If **Make Single PDF** was selected, a PDF file is delivered. If **Make Single PDF** was *not*

selected, a .ZIP file containing multiple PDFs is delivered.



9. If both **Make Single PDF** and **Only actual pages** were left unchecked, the contents of the delivered .ZIP file should resemble the following, containing a mix of PDFs generated from planned pages and actual pages.



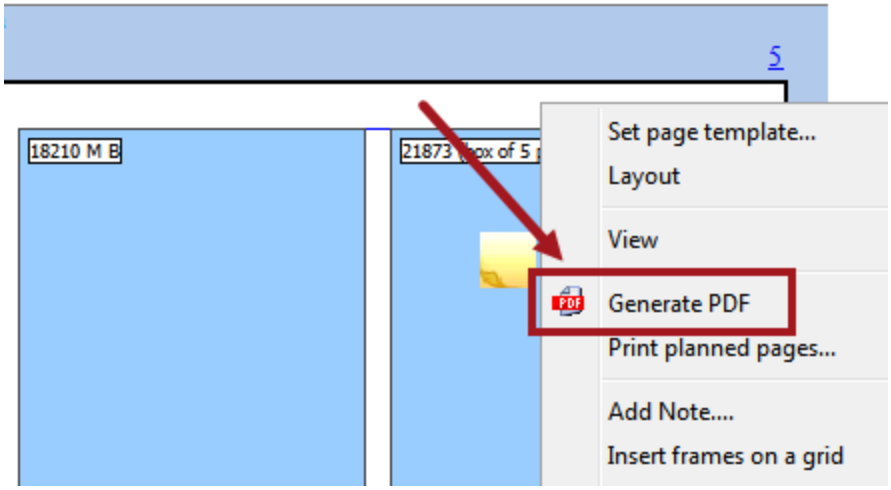
Generate a PDF from a Spread

1. In the Tree, navigate to the desired publication, then open the **Plan** tab from a publication, section, or planned page.

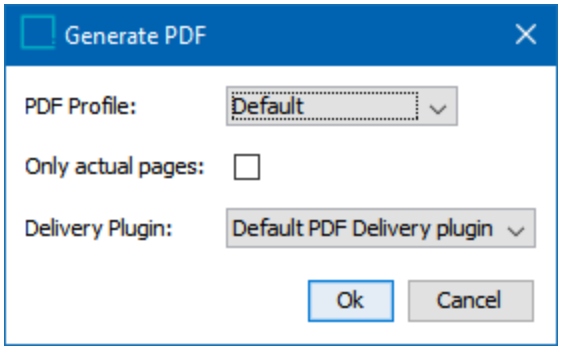
   Note: Regardless of the publication hierarchy level selected, a PDF can only be generated from the selected spread when using this method.

2. On the **Plan** tab, right-click in the white area of the page, and then choose **Generate PDF**.

   Note: Clicking on either the left-hand page or the right-hand page will generate a PDF of both pages in the spread.



3. The **Generate PDF** dialog appears. In the **PDF Profile** list, select the preferred profile.



Note: PDF profiles are system dependent. Therefore, the PDF profile is set to Default if no special PDF profiles have been configured for the system. For more information on creating new PDF Profiles for your system, see the **Setting up PDF Profiles (Presets) for the InDesign Server** topic.

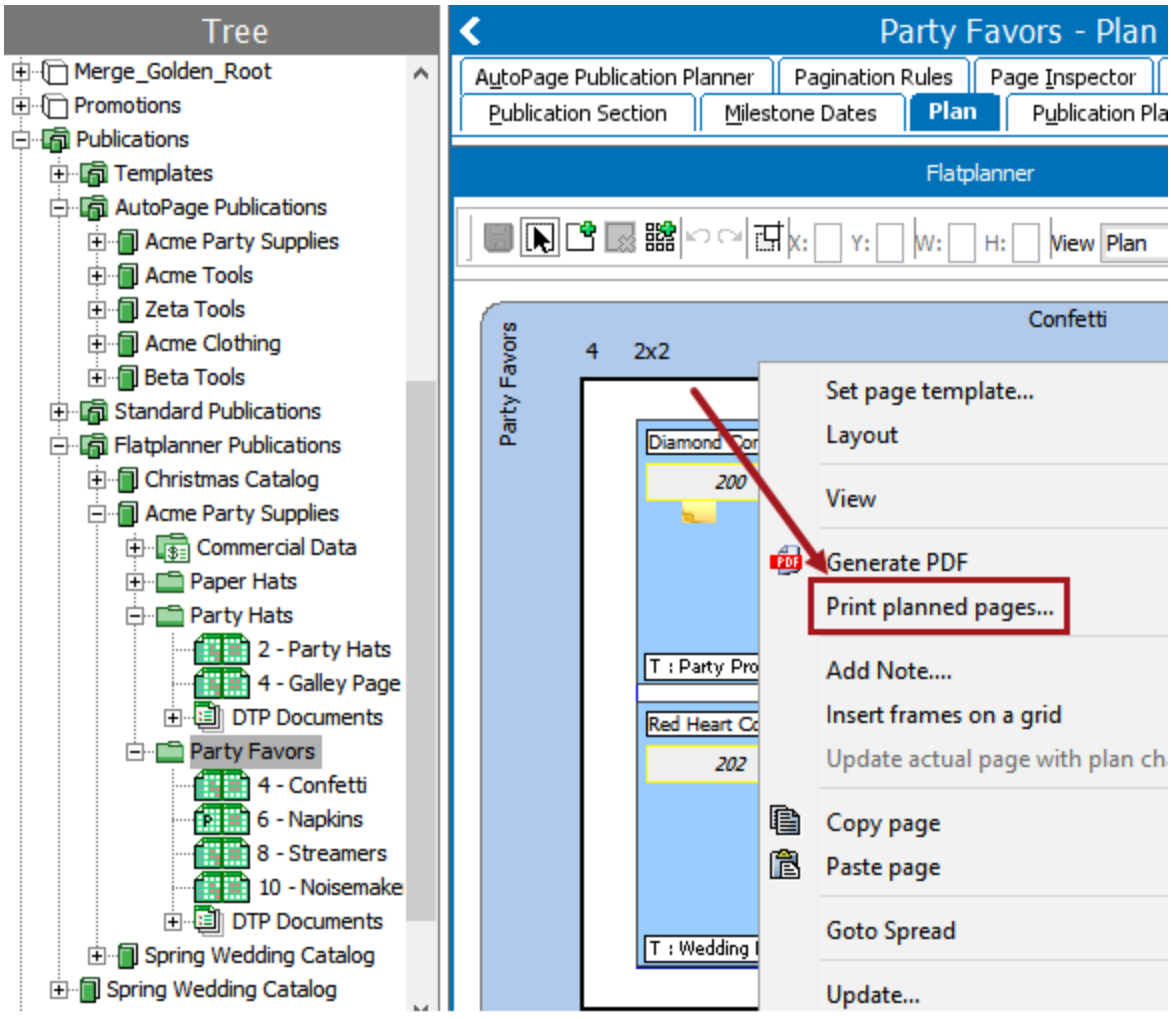
4. Check **Only actual pages** if you want the PDF to only include pages that have been completed in InDesign and saved back to STEP.
5. Select the relevant **Delivery Plugin**. By default, this is 'Default PDF Delivery plugin.'
6. Click **OK**. The PDF is instantly generated and does not require a BGP.

Printing Planned Pages

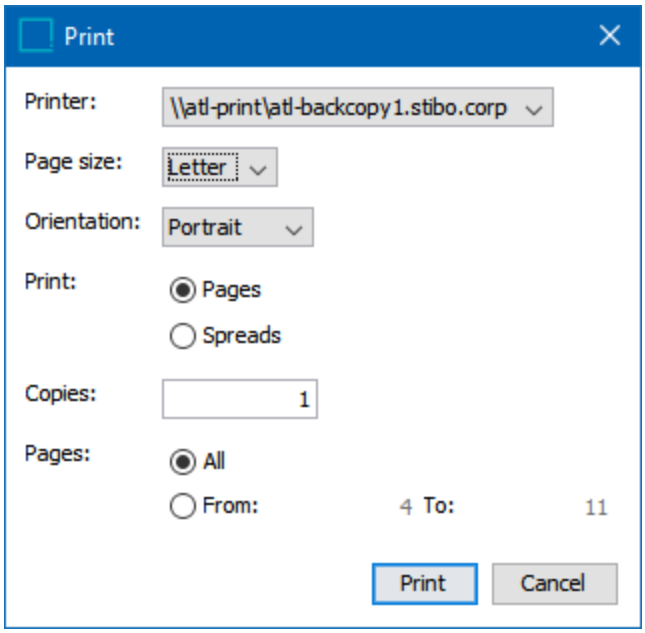
Planned pages can be printed from Flatplanner publications by right-clicking on a planned page spread on the Plan tab. Single spreads or multiple pages can be printed, from the publication, section, or spread level.

Note: Printing planned pages only prints the Flatplanner frames themselves. To extract page previews of planned pages, a PDF will need to be generated. Follow the instructions in the **Generating PDFs in Flatplanner** topic for information on generating PDFs from planned pages.

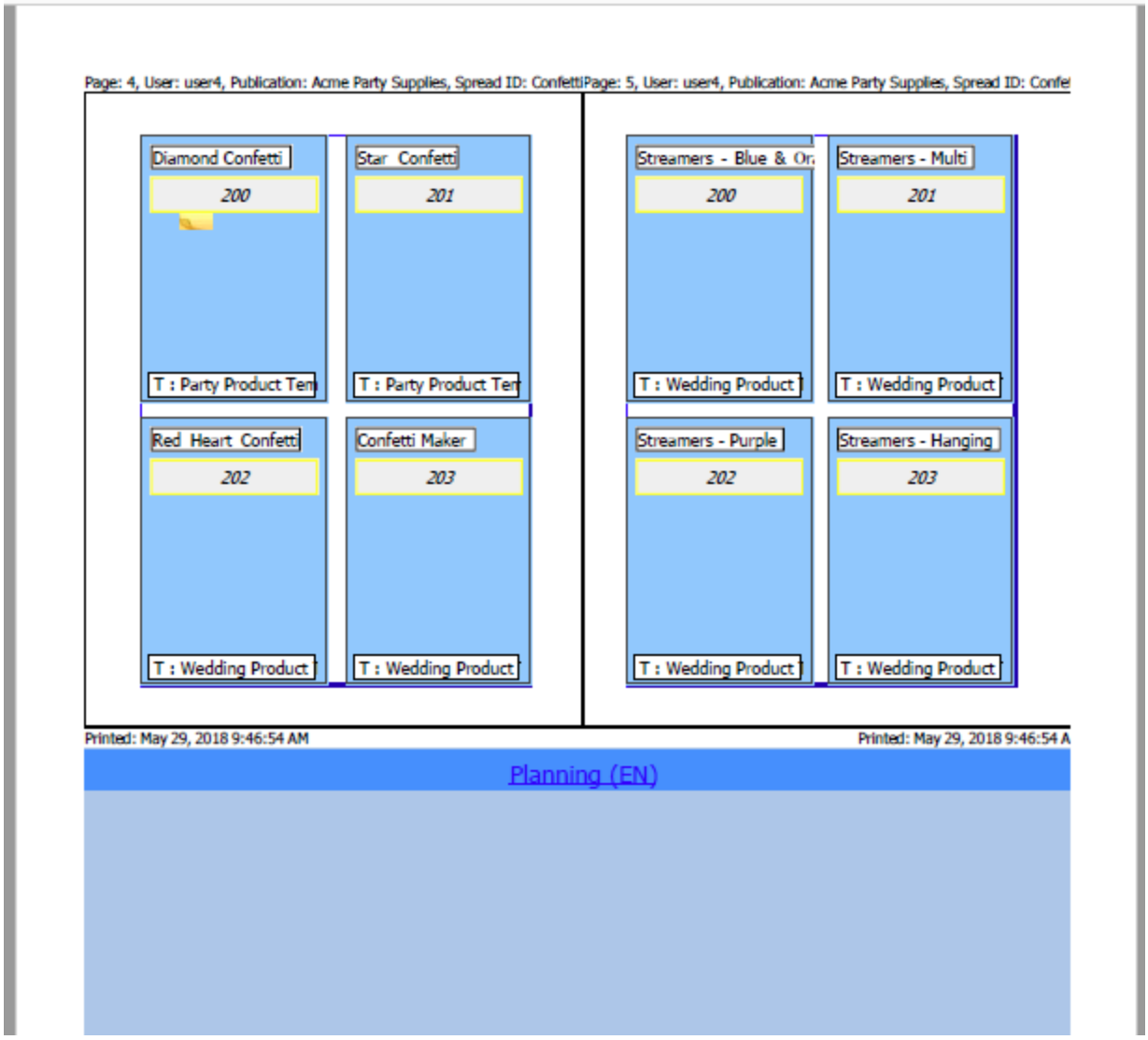
1. In the Tree, navigate to the desired publication, then open the **Plan** tab from a publication, section, or planned page, depending on how many pages you want to print.
2. On the **Plan** tab, right-click the white area of a planned page, and the choose **Print planned pages**.



3. In the 'Print' dialog, make the desired selections for **Printer**, **Page size**, and **Orientation**.



4. For the **Print** option, Select **Pages** if you want to print a single planned page on each page, or select **Spread** to print both planned pages in spreads together.
5. Enter the number of **Copies** that you would like to print, then select **All** for the **Pages** option to print all available pages, or select **From** to define the range of pages you want to print.
6. If you selected **From**, the 'from' (not labeled) and 'To' fields are activated.
7. Enter the desired page range, then click **Print**.
8. The planned pages will output based on the selections made in the **Print** dialog. The below screenshot shows a printout from the **Plan** view. Planned pages can also be printed from the **Sticker Book** view (not pictured).


Page: 4, User: user4, Publication: Acme Party Supplies, Spread ID: Confetti
Page: 5, User: user4, Publication: Acme Party Supplies, Spread ID: Confe
Diamond Confetti
200
T : Party Product Tem
Star Confetti
201
T : Party Product Tem
Red Heart Confetti
202
T : Wedding Product
Confetti Maker
203
T : Wedding Product
Streamers - Blue & Or
200
T : Wedding Product
Streamers - Multi
201
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Planning (EN)

Publication Planner

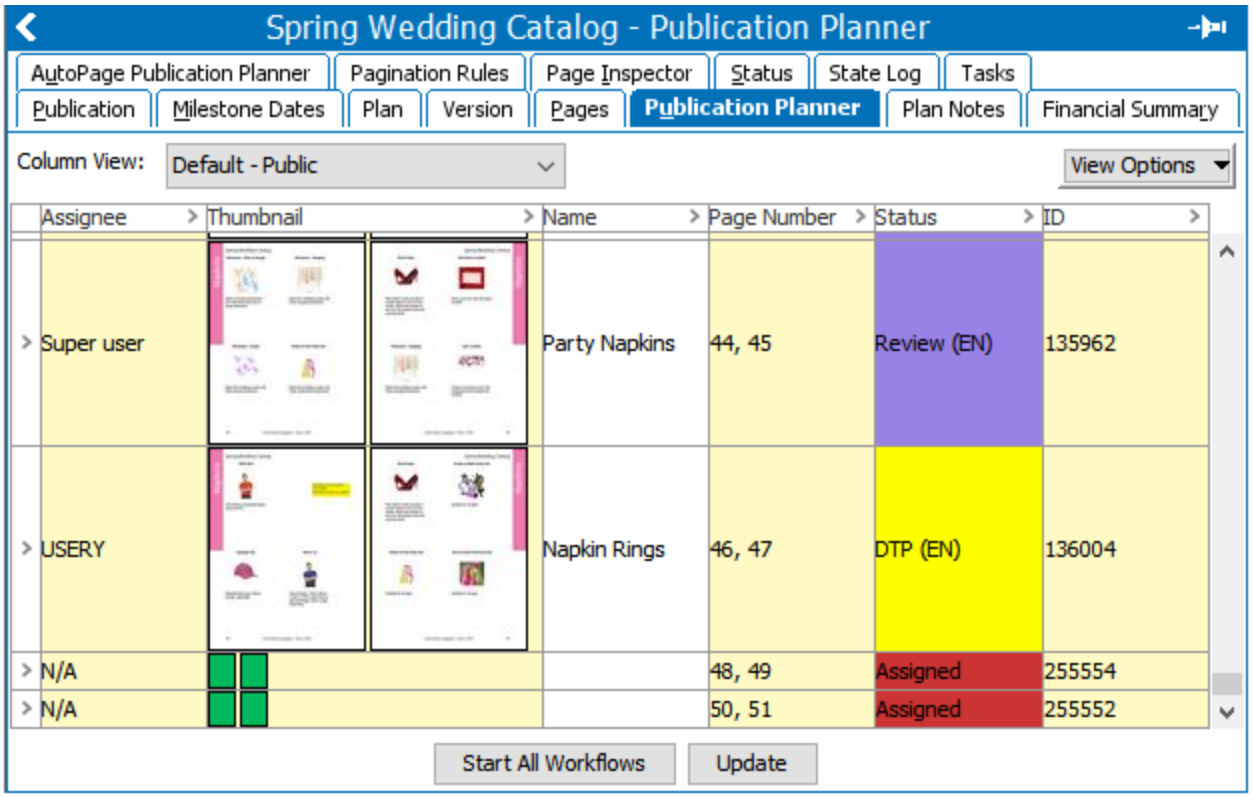
The Publication Planner is used to control the pages of a publication and is accessed from the **Publication Planner** tab when a publication or section is selected in the Tree. In the Publication Planner, all pages in a section or publication can be viewed in one location, allowing pages to be easily organized, added, removed, or rearranged.

Actions that can be performed on pages in the Publication Planner include:

- Insert or remove pages and sections
- Reorder the sequence of pages
- Renumber pages automatically
- Apply page templates to pages
- View information related to the planned page or frame contents
- Start and stop workflows

Views can be configured for the Publication Planner to display information about pages such as their names, page numbers, metadata attributes, and DTP update status. Data can also be viewed at the frame level, such as displaying which products are assigned to which frames. If using a Flatplanner workflow, the Publication Planner can be used to monitor the status of each page spread as it progresses through the workflow.

The below screenshot shows a basic view configuration for the Publication Planner. Columns can be added or removed in the Publication Planner **view** to show more, or less, information about the planned pages. For more information on configuring views in the Publication Planner, see the **Configuring the Publication Planner Column View** section of this guide.



This documentation section covers the following topics related to the Publication Planner:

- Configuring the Publication Planner Column View
- Publication Planner View Elements
- Publication Planner Actions
- Organizing Pages in the Publication Planner
- Inserting Sections in the Publication Planner

For information on using the Publication Planner with Flatplanner workflows, see the **Flatplanner Workflows** section of this guide.

Configuring the Publication Planner Column View

The Publication Planner interface displays information about Flatplanner sections, subsections, and pages in a **view**, which is a tabular format of rows and columns. Each **row** contains either a section, subsection, or page. Each **column** displays a piece of information about the section, subsection, or page, such as Name, ID, page thumbnail, page numbers, and Flatplanner workflow status.

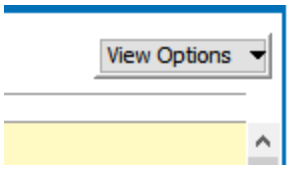
Columns can be added to and removed from the Publication Planner view either by using the **View Options** dropdown at the top right of the editor or through right-click actions on the columns themselves. Different configurations of columns can be stored in **views**, which can be either public or private. These views are accessed from the **Column View** dropdown list at the top of the editor.

This topic explains how to maintain the columns within the Publication Planner, but does not explain how to maintain views themselves (i.e., how to copy a view, delete a view, or make a view public or private). For more information, see the **Views** section of this guide. Actions that can be taken on **rows** in the Publication Planner are explained in the next section of this documentation, **Publication Planner Actions**.

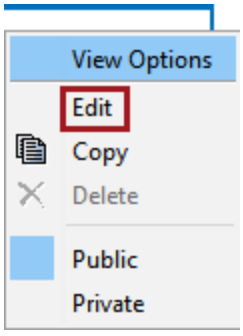
Edit a Publication Planner View Using View Options

Follow these steps to edit a Publication Planner view using the View Options dropdown:

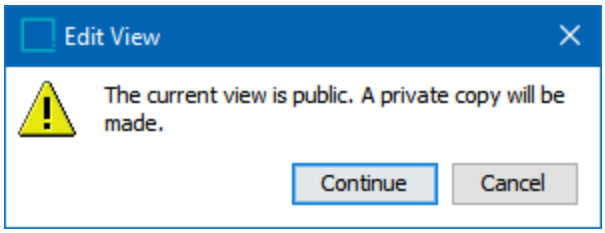
1. In the upper right-corner of the interface, click the **View Options** button.



2. In the menu that displays, click **Edit**.

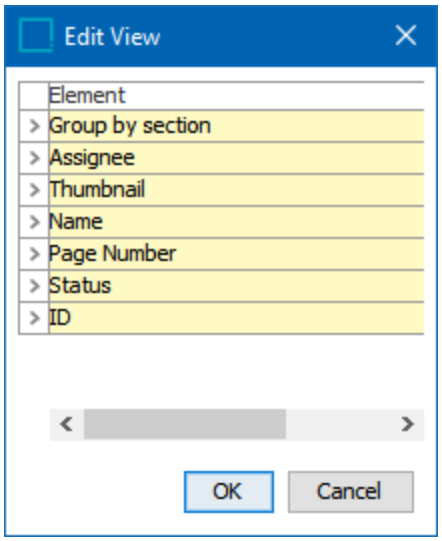


3. If the current view is Public, an 'Edit View' warning dialog will display that says 'The current view is public. A private copy will be made.' Click **Continue** to create a private copy of the view and proceed with editing.



Note: This newly created view will only be visible to the user currently making the edits. To make this view available to all users, it must be made Public. For more information on how to maintain Public and Private views, see the **Public and Private View Options** section of this guide.

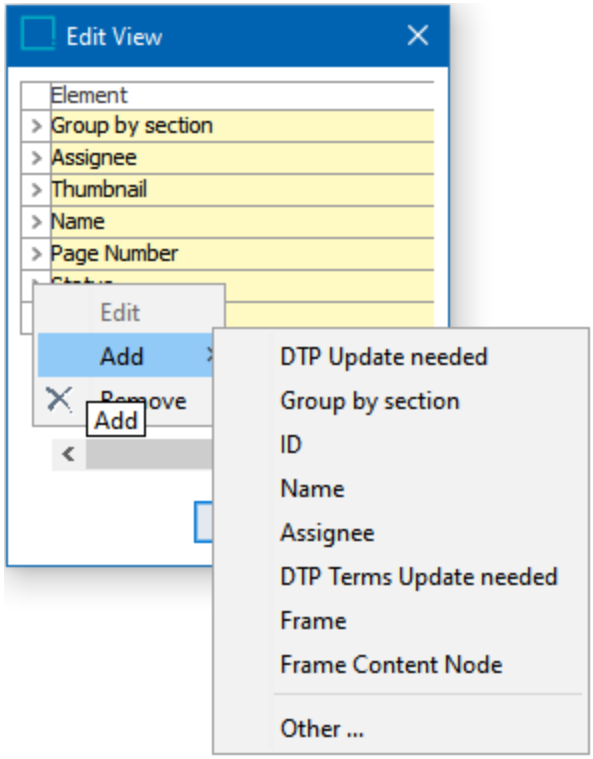
4. The **Edit View** dialog displays, showing a list of the current view content elements. This list will be different depending on how the view was last configured before being edited.



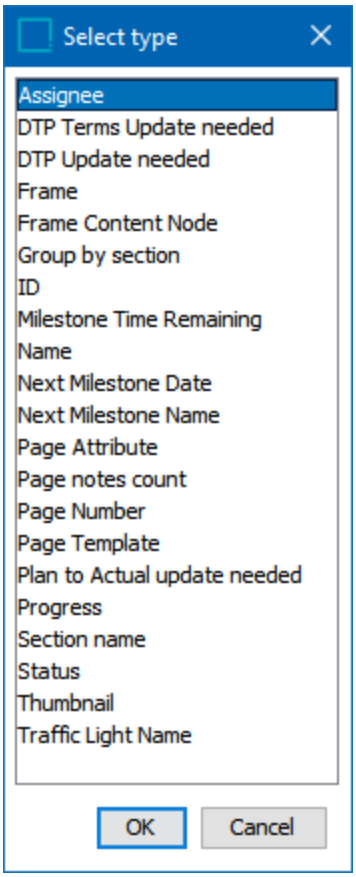
Add New View Elements

To add new elements to a view:

1. Either right-click an existing element or right-click in the white space below the existing elements, then select **Add** to display a list of the most recently used elements.



- To view the full list of content element options, click **Other …** to display the **Select type** dialog.



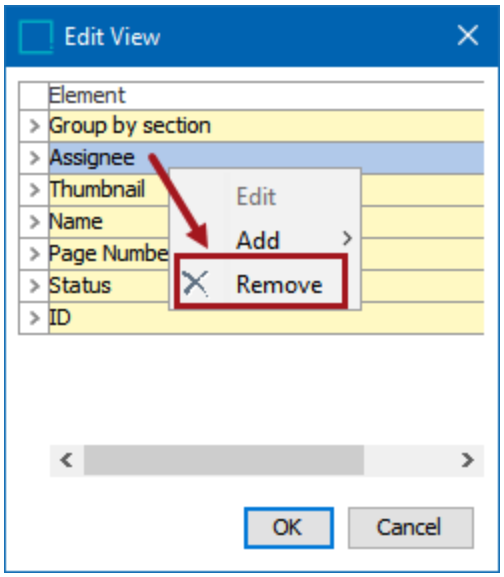
2. Select the element that you want to add by either selecting it from the **Add** dropdown list or the **Select type** dialog. Click **OK** when complete.

For detailed information on each element, see the **Publication Planner View Elements** topic in this guide.

Remove View Elements

To remove an element from a view:

1. In the **Edit View** dialog, select the row containing the desired element, then right-click and select **Remove**.

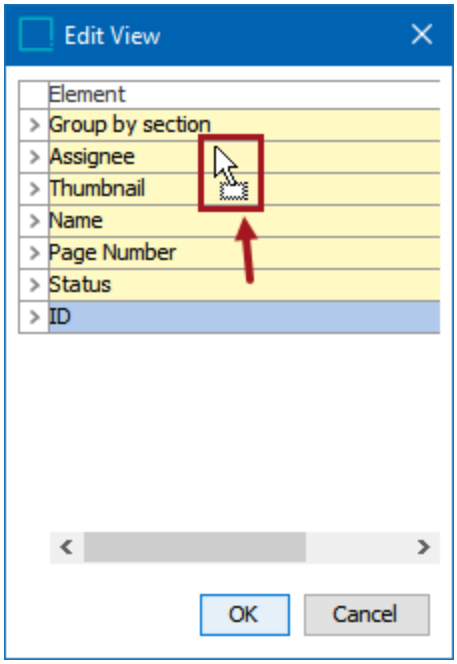


2. Click **OK** to remove the element.

Change the Sequence of View Elements

The order that the elements appear from top to bottom in the **Edit View** dialog is how they will display from left to right. To resequence the elements in the Edit View dialog:

1. Left-click on the element that to move to a different position, then hold down the mouse button and drag the element up or down to the desired location.
2. Release the mouse button when the element has been properly positioned.

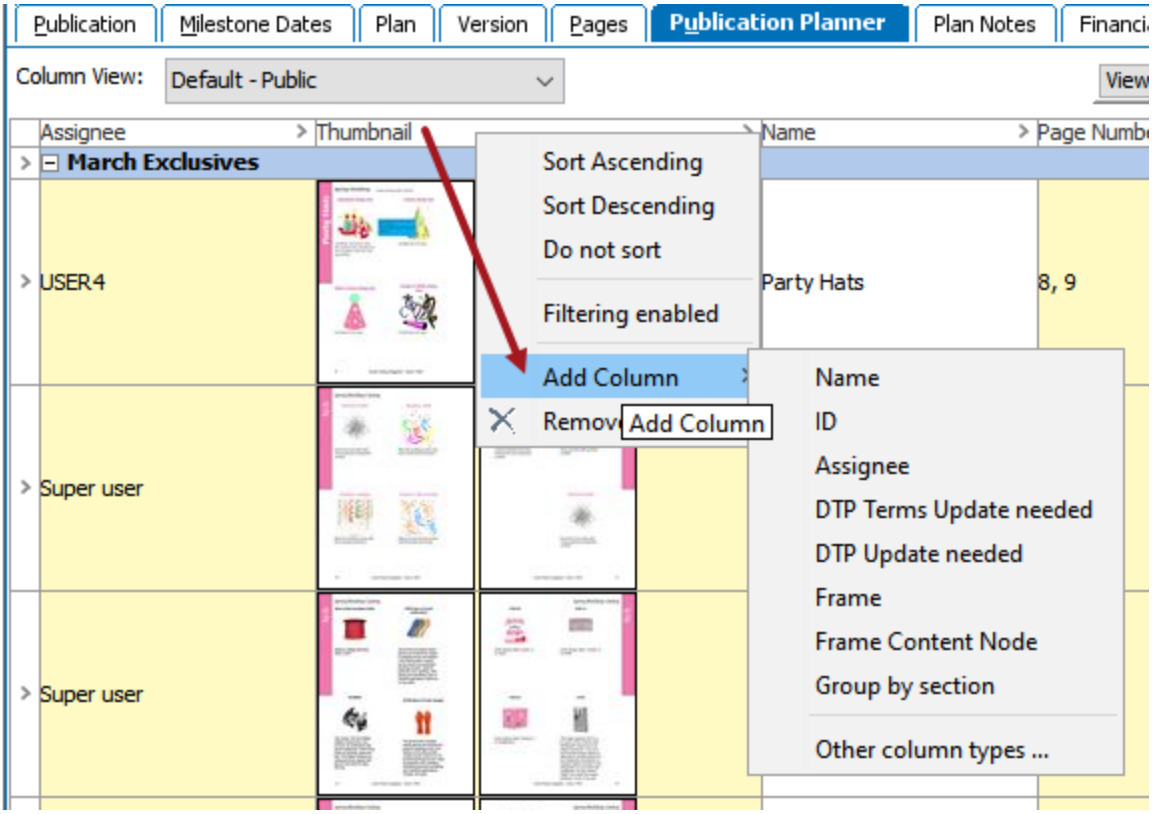


3. Click **OK** to save changes.

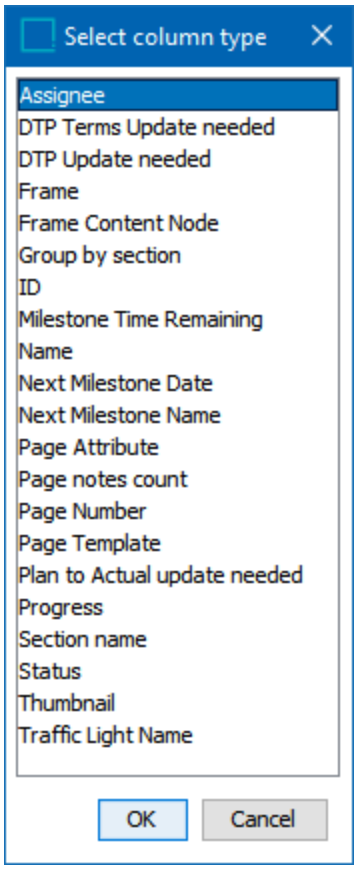
Edit a Publication Planner View by Column

To add or remove columns from the Publication Planner view, follow these steps. Columns cannot be resequenced this way; that can only be done by using View Options.

1. Right-click on the header of the column that is adjacent to where you would like to add the new column, then select **Add Column**. (The new column will be added immediately to the right of the selected column.) A menu displays that lists the eight most recently used elements.



2. Select the relevant column from the list, or, to view the full list of column options, click **Other column types…** to display the **Select column type** dialog. The available options are identical to those listed in the **Select type** dialog outlined in the previous subsection.



Remove a Column from a View

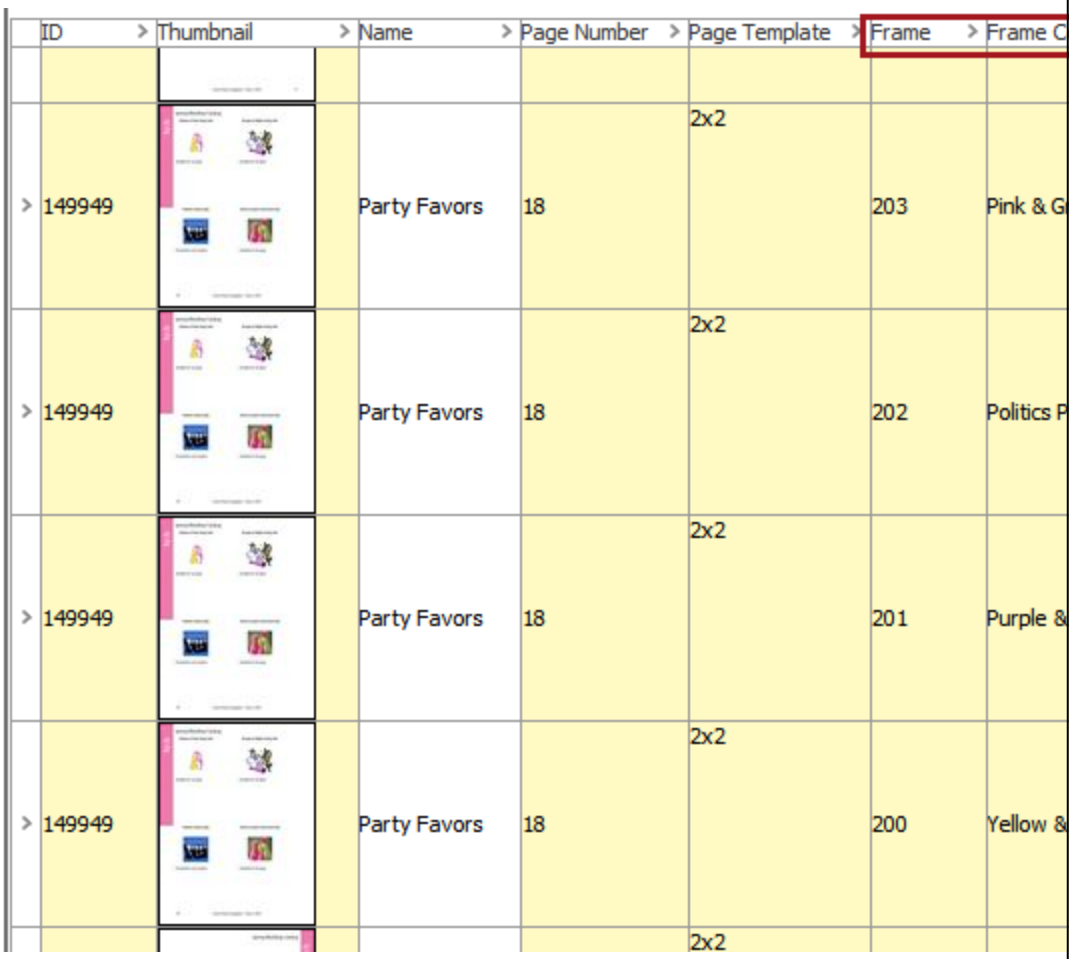
1. Right-click on the header of the column that you would like to remove from the view, then select **Remove Column**.

Publication Planner View Elements

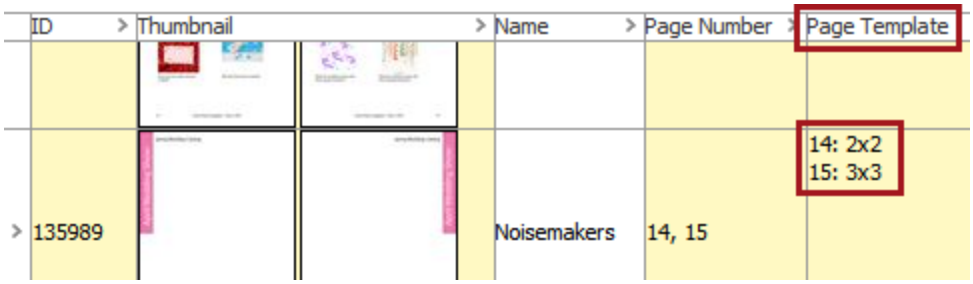
This topic describes the available elements that can be placed into Publication Planner view **columns**. Options that are only applicable for Flatplanner workflows are indicated by 'Yes' in the third column of the below table.

Additional information is provided below the table for the **Group by section**, **Page Attribute**, and certain **workflow-related** elements, since these elements either behave differently than the others (for example, 'Group by section' affects rows instead of columns) or require additional configurations.

Content Element	Description	Only Applicable for Flatplanner Workflows
Assignee	Displays the current user assigned to the spread	Yes
DTP Terms Update needed	Displays if a commercial term has a different value on an actual page than the term in the database	No
DTP Update needed	Indicates, through a green check mark ✔, the result of a previously performed comparison between the data held on an actual page for the planned spread and the active data in STEP.	No
Frame	Displays the frame ID. Choosing this option will expand the rows of the Publication Planner to show each page frame on its own row, allowing for a greater overview of the objects linked into each frame. Typically used in conjunction with the 'Frame Content Node' option (explained in the following row).	No

Content Element	Description	Only Applicable for Flatplanner Workflows
		
Frame Content Node	Displays the name of the object linked into the Flatplanner page frame. The 'Frame' option (explained in the previous row) must be enabled for this option to be useful.	No
Group by section	Adds a tree-like control for each section and groups the planned pages under them. For more information, see the 'Additional Configuration Information for Certain Publication Planner View Elements' subsection below.	No

Content Element	Description	Only Applicable for Flatplanner Workflows
ID	Displays the ID of the first page in the spread. If the 'Frame' option is enabled, the ID of both pages is visible, since there is a separate row in the Publication Planner for each frame on a page.	No
Milestone Time Remaining	Displays the percentage of time remaining until the next milestone.	Yes
Name	Displays the name of the spread.	No
Next Milestone Date	Displays the next milestone date based on the milestone configuration and next milestone in the workflow.	Yes
Next Milestone Name	Displays the next milestone name as defined by the workflow business rule actions.	No
Page Attribute	Displays the value of an attribute from the planned page (attribute is configurable). For more information, see the 'Additional Configuration Information for Certain Publication Planner View Elements' subsection below.	No
Page notes count	Displays the number of non-Done and Done notes applied to a page. For example, a number of **15/1** indicates that there are a total of **16** notes on the page, **15** of which are *not* marked Done, and **1** that *is* marked Done.	No
Page Number	Displays the page number of the planned page.	No
Page Template	Displays the page template assigned to the plan. If a different template is applied to the left page and right page, both will display.	No

Content Element	Description	Only Applicable for Flatplanner Workflows
		
Plan to Actual update needed	Indicates, through a green check mark ✔, if the plan has been updated since the actual page was last worked on and saved to the database.	No
Section name	Displays the name of the section.	No
Status	Displays the current workflow state.	Yes
Thumbnail	Displays a thumbnail of the actual page if one has been produced for the plan. If not, two green rectangles are shown to represent pages.	No
Traffic Light Name	Displays the name of the attribute calculated as the milestone date color.	Yes

Additional Configuration Information for Certain Publication Planner View Elements

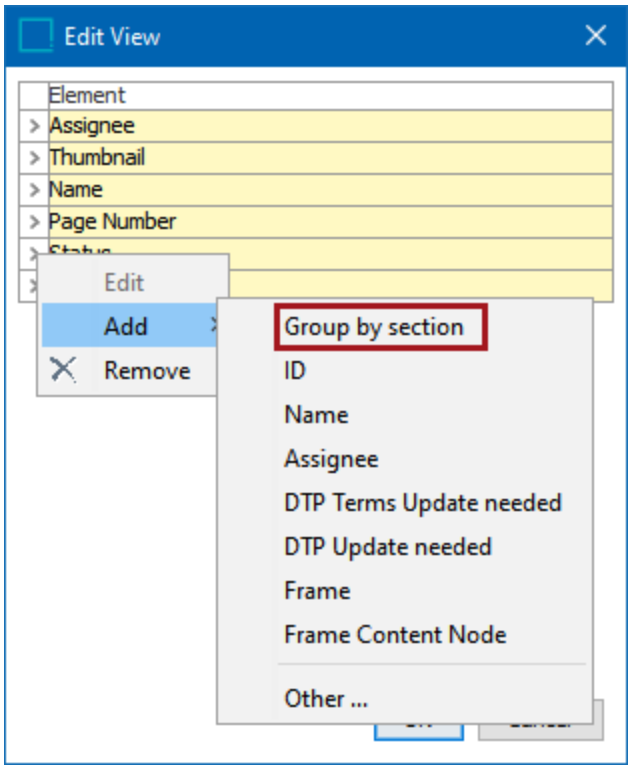
The following Publication Planner view elements have special considerations that differ from other view elements, which are added to columns.

Group by Section

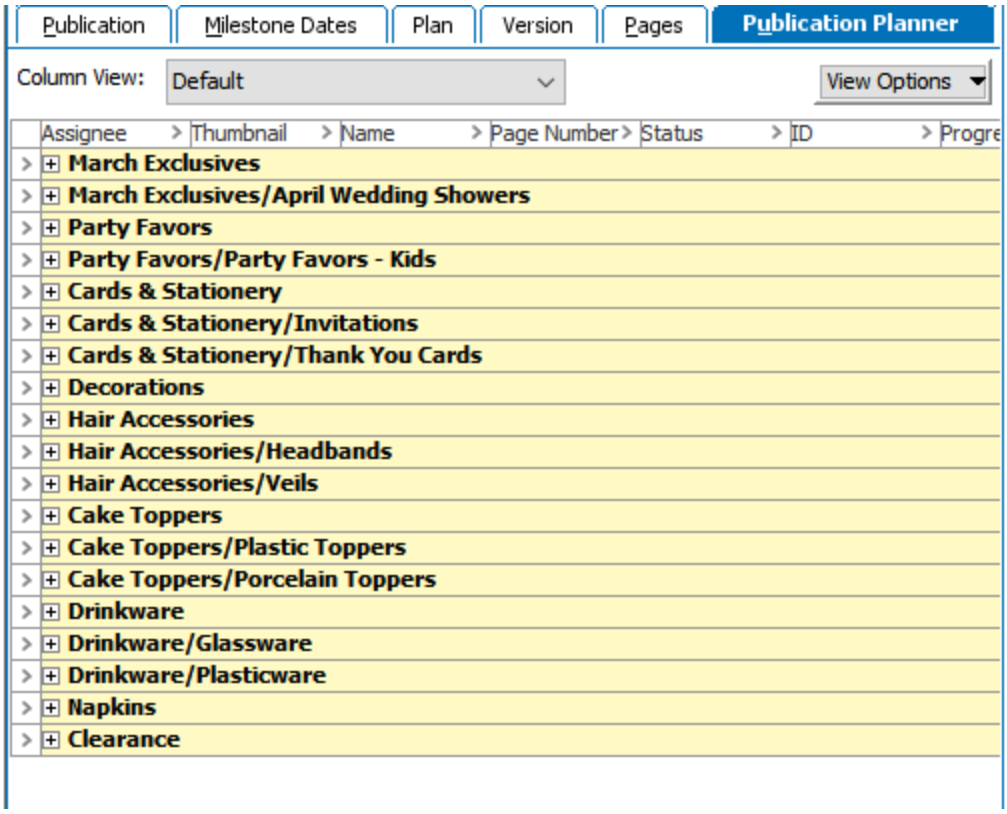
This option is the only view element that affects the display of the Publication Planner **rows**. This option determines whether all Flatplanner pages are displayed in a flat format or whether they are grouped by section.

To enable this option:

1. Click on View Options > Edit to open the **Edit View** dialog.
2. Either right-click an existing element, or right-click in the white space below the existing elements, then select Add > **Group by section**.



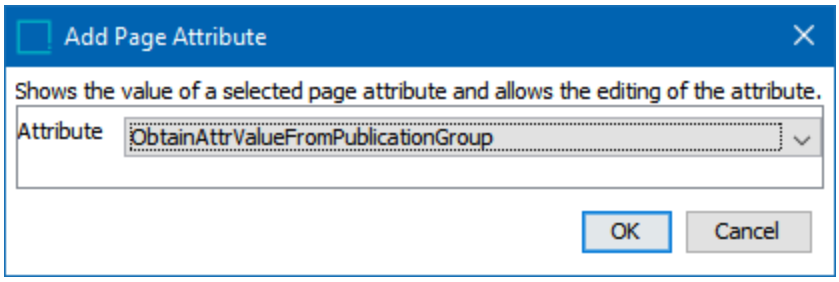
3. The sections will be displayed as rows in the Publication Planner. Click a plus sign next to any section name to expand it. All sections are shown in a flat hierarchy, with subsections named with a slash after the section name, e.g., 'Cards & Stationery/Invitations', with 'Invitations' being the subsection located within the 'Cards & Stationery' section.



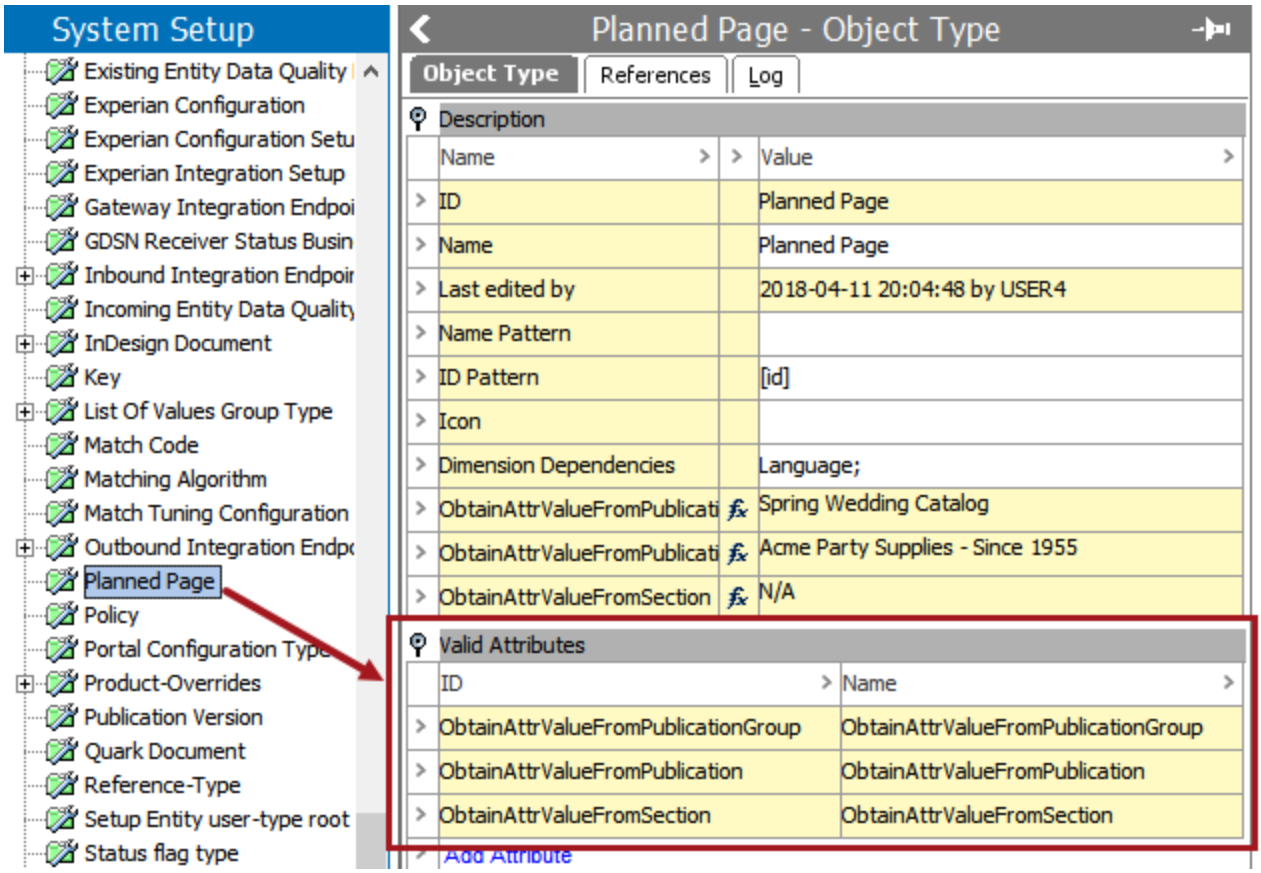
Page Attribute

This option requires additional configuration before it can be added to the view.

1. When you add a Page Attribute column, the **Add Page Attribute** dialog displays, requiring you to make an attribute selection.



2. Select the desired attribute from the 'Attribute' dropdown, then click **OK**.
3. The available attributes are picked up from the valid attributes applied to the Planned Page object type, located in System Setup under Object Types & Structures > Basic Object Types > **Planned Page**.



4. One use case for applying attributes to a page template is for pulling in metadata attribute values from the publication hierarchy, which can then be mounted to InDesign pages. See the **Using the getInheritedPublicationValue Function in Flatplanner** topic for more information on this use case.

STEP Workflow Elements

The columns **Milestone Time Remaining**, **Next Milestone Date**, **Next Milestone Name**, and **Traffic Light Name** are colored according to the current date, milestone date and duration / color settings. For more information about how to configure milestones and traffic lighting, see the **Publication Milestones** topic in this guide. For general information on Flatplanner workflows, see the **Flatplanner Workflows** documentation.

Publication Planner Actions

The Publication Planner supports the following actions by right-clicking one or more **rows**, as opposed to configuring view elements, which work on **columns**. The options are listed in the table below in the order they appear in the right-click menu.

Options that are only applicable for Flatplanner workflows are indicated by 'Yes' in the third column of the table. For more information on Flatplanner workflows, see the **Flatplanner Workflows** documentation.

Action	Description	Only Applicable for Flatplanner Workflows
Add Section In	Creates a new section on specified level.	No
Create new Section from existing...	Creates a new section in the selected section by duplicating from another.	No
Add Pages Before Selected Page	Creates additional Flatplan pages before the selected page.	No
Add Pages After Selected Page/Section	Creates additional Flatplan pages after the selected page.	No
Autonumber pages	Renumbers the Flatplan pages.	No
Set page template	Sets the page template on the selected Flatplan pages.	No
Remove Pages	Deletes the selected pages. The page cannot be deleted if it has been initiated into a Flatplanner workflow.	No
View Plan	Navigates away from the Publication Planner tab to the spread on the Plan tab.	No
Assign Pages	Sets the user assigned to the Flatplan page(s) (if workflow is not	Yes

Action	Description	Only Applicable for Flatplanner Workflows
	active for the pages).	
Start Workflows	Starts the workflow for the selected Flatplan page(s)	Yes
Stop Workflows	Stops the workflow for the selected Flatplan page(s)	Yes
Return task to default group assignment	Releases a current task that has been claimed by a user to the default group assignment.	Yes
Goto workflow process	Go to the workflow process in the workflow tab.	Yes
Create InDesign Package from flatplans	Initiates a process that creates an InDesign package for the Flatplans	No
Import InDesign Package	Initiates a process that imports an InDesign package	No
Generate PDF	Initiates a process that creates a PDF of the pages.	No
Check for update needed...	Initiates a process that compares the STEP data mounted onto the InDesign documents with that in the database and reports if a difference is found.	No
Update...	Initiates a process that updates STEP data mounted onto the InDesign documents.	No
Update actual page with plan changes	Initiates a process that adjusts the actual pages for changes made to the Flatplan pages (e.g., product swapped between pages).	No
Copy table to clipboard for Excel	Copies the data displayed in the publication planner so it can be pasted into a spreadsheet for external purposes.	No

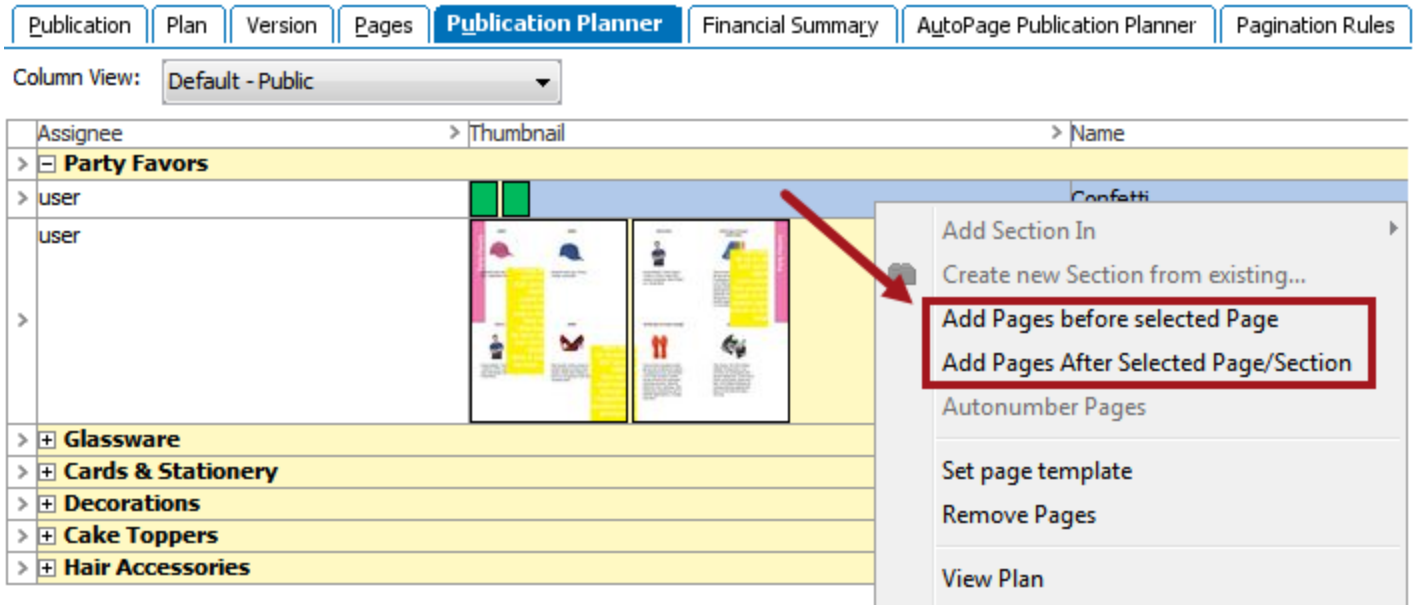
Organizing Pages in the Publication Planner

This topic describes how to add, delete, reorder, and renumber pages using the Publication Planner. For all options below, it is recommended to enable the 'Group by section' view option. See the **Publication Planner View Elements** topic for information on this option.

Add Pages

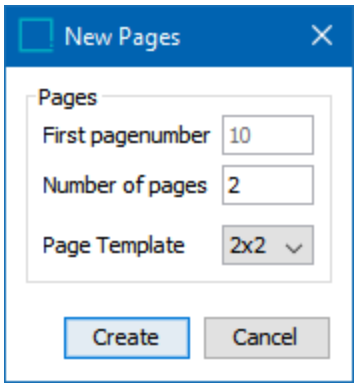
Follow these steps to add pages to a section.

1. Right-click the page that you would like to add pages before or after, then choose either **Add Pages before selected Page** or **Add Pages After Selected Page/Section**.



   - To add new pages to the *end* of a section, right-click on a selected **section** and select **Add Pages After Selected Page/Section**. The 'add pages before' option will be grayed out.

2. In the **New Pages** dialog that displays, the following options are available.



- **First pagenumber:** *Option will always be disabled*
- **Number of pages:** Enter the number of pages you want to add.
- **Page Template:** The default page template applied to the publication automatically displays. To use a different page template, select it from the dropdown list.

3. Click **Create** to insert the pages.

Remove Pages

Follow these steps to remove pages from a section.

Note: Pages cannot be removed if they are in a Flatplanner workflow.

1. Click the **+** sign next to the name of a section to view the pages within the section.
2. Right-click a page, and then choose **Remove Pages**. If you want to remove multiple pages, hold down the Shift key while you select the pages.
3. A warning message appears asking you to confirm the deletion. Click **OK** to confirm the deletion.

Change the Page Order

Follow these steps to rearrange pages.

Note: Pages cannot be rearranged if they are in a Flatplanner workflow.

1. Click the row that contains the page that you want to move, then hold down the left mouse button while you drag and drop the page to its new position.
2. When a page is moved, the page numbers are automatically updated.

Note: This does not update the page number of *actual* pages. See the below subsection 'Autonumbering Actual Pages' for more information on renumbering actual pages.

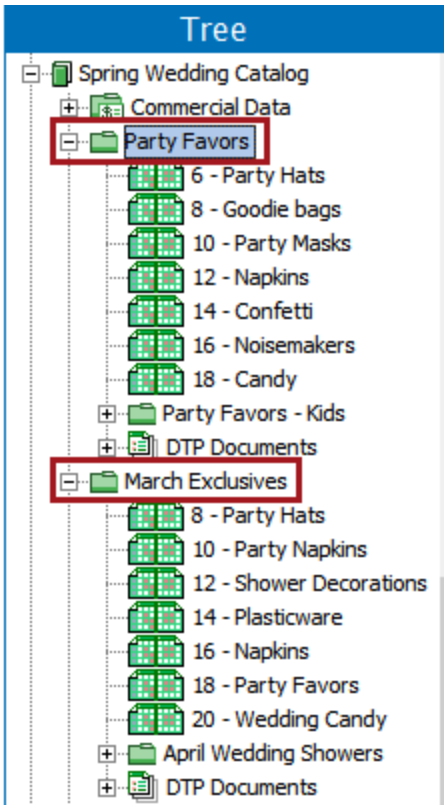
Change the Section Order

Sections cannot be reordered or deleted from within the Publication Planner; these actions must be performed in the Tree. However, pages can be automatically renumbered in the Publication Planner after the sections have been rearranged. See the below subsection 'Autonumber pages' for more information on renumbering actual pages

Autonumber Pages

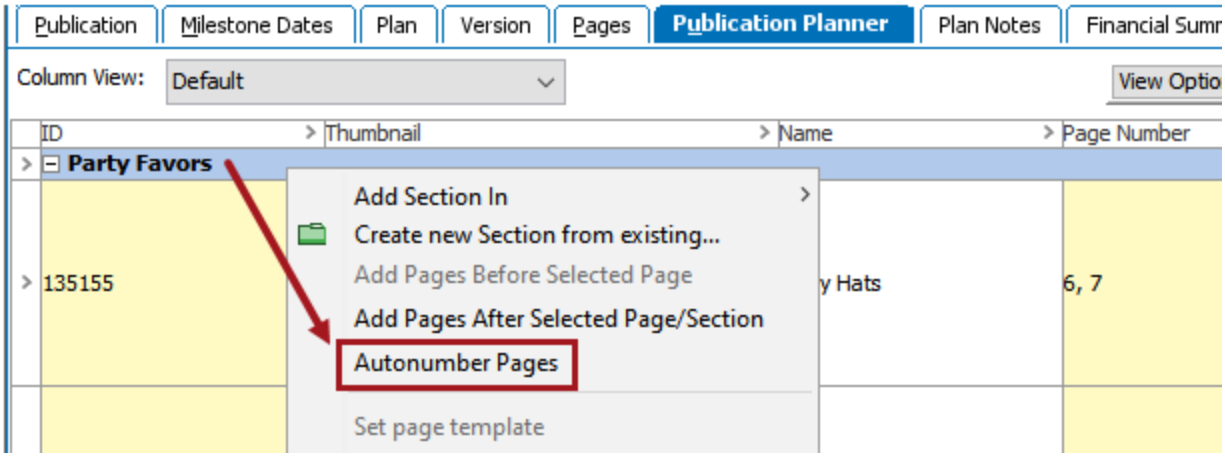
Note: The 'Group by section' view option must be enabled before pages can be autonumbered.

In this example, sections in a publication have been rearranged in the Tree, causing the page numbers to be out of order. The 'Party Favors' section starts at page 6 and ends at page 19. The 'March Exclusives' section starts at page 8 and ends at page 21.

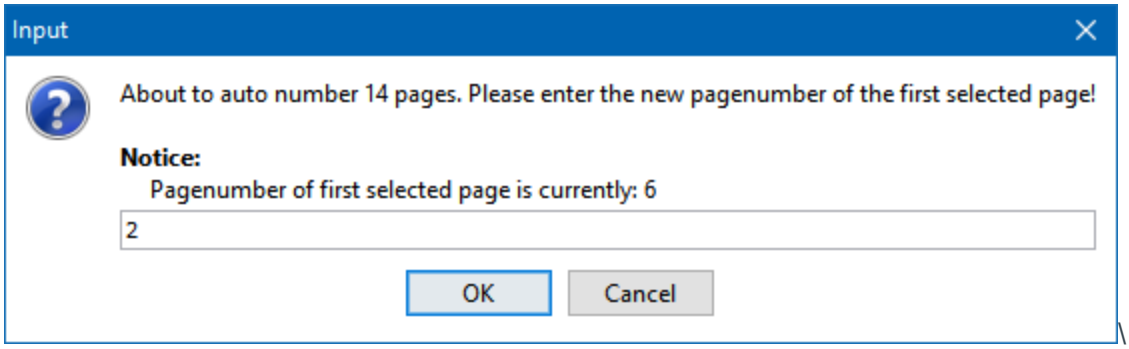


To automatically renumber the pages in a section:

1. In the Publication Planner, select the section that contains the pages that you want to renumber, then right-click and select **Autonumber Pages**.



2. In the 'Input' dialog that displays, enter the page number where you want the pages in the section to begin, then click **OK**.



3. The pages in the section are renumbered, beginning with the specified page number.

> **Note:** If the section contains subsections, the pages in the subsections will not be automatically renumbered. Each section and subsection must be autonumbered individually.

4. To autonumber the next section, follow the same process, and enter the desired page start number again. For example, if the previous section ends on page 15, then start the new section at page 16 (though any page number can be entered).

Autonumbering Actual Pages

Renumbering pages in the Publication Planner only updates the page numbering of *planned* pages—the page numbers on actual pages are not updated. Actual pages must be updated using one of the update methods available in the STEP Workbench or from within InDesign. For more information, see the **Updating Documents in Flatplanner** topic.

Inserting Sections in the Publication Planner

The Publication Planner makes it easy to add new sections and subsections into an existing publication or section, while adding new pages at the same time. Though this can also be done from the Tree, it can be helpful to use the Publication Planner since the column view provides more visibility into the content of the existing sections and pages.

Note: Sections cannot be deleted or re-ordered from within the Publication Planner; they can only be added. These actions must be taken in the Tree.

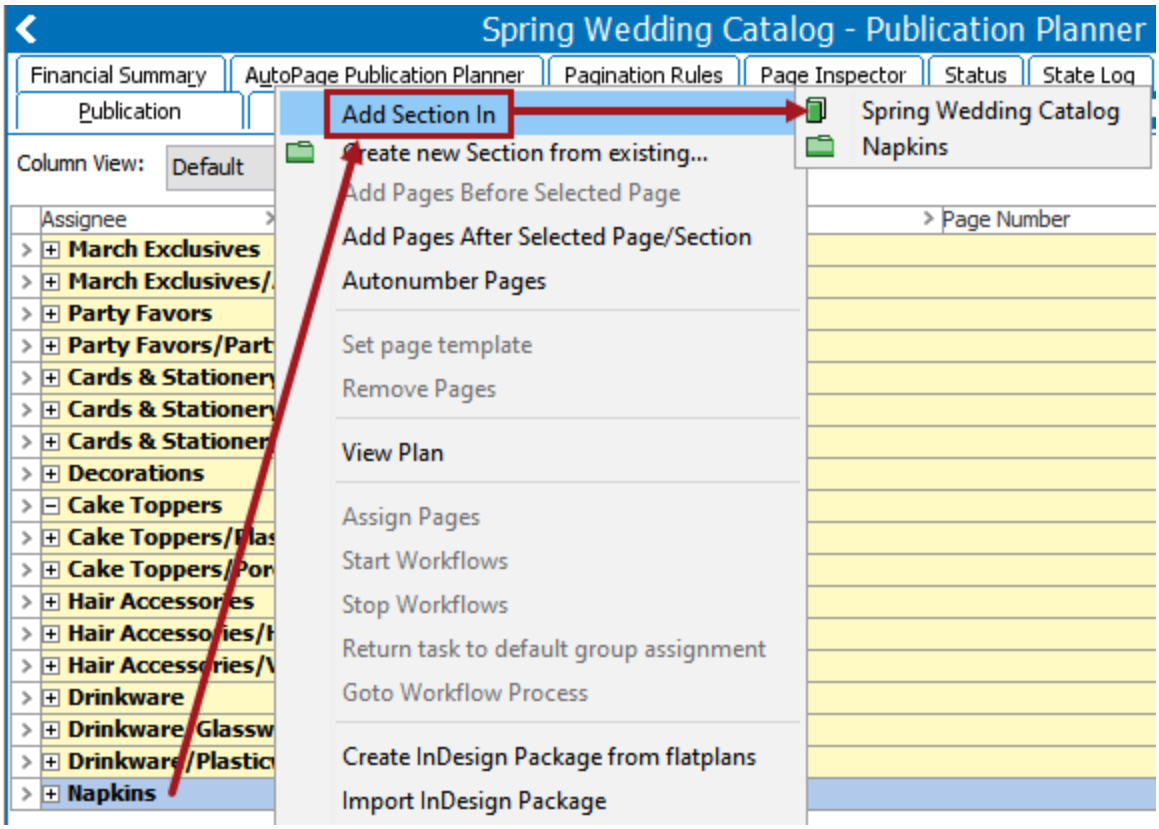
Prerequisites

At least one section must already exist in the publication before a new section can be added. If no sections exist, then one or more sections must first be added to the publication in the **Tree**. For more information, see **Creating a Section** in the **Publication Hierarchy** documentation.

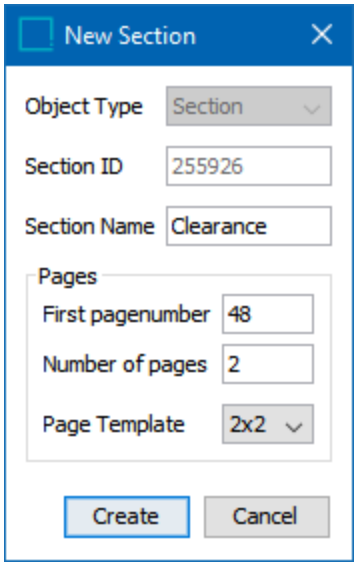
Add a New Section or Subsection

To add a new section to your publication or a subsection to an existing section:

1. With your publication or section selected in the Tree, go to the **Publication Planner** tab.
2. Ensure that the **Group by section** option is enabled. If not, follow the steps outlined in the **Publication Planner View Elements** topic to activate it.
3. Either left-click the gray arrow next to the desired section row, or select a section row and right-click. To add a subsection to an existing section, make sure that you have selected the preferred parent section.
4. In the popup menu, choose **Add Section In**. If you want to add a section to the publication itself, click on the publication. If you want to add the new section as a subsection to the selected section, then click on the section. For this example, the publication is selected.



5. In the **New Section** dialog, the following fields must be populated:



- **Object Type:** Select the section object type to be used for the new section. If only one section object type is available in the system, this field will be grayed out.

- **Section ID:** Enter an ID for your section if the section object type's ID has not been set to prepopulate with an ID pattern.
- **Section Name:** Enter a name for the section.
- **First page number:** Enter the page number that the pages in the section should start on.
- **Number of pages:** Enter the number of pages the section should have.
- **Page template:** Select the desired page template from the dropdown list. The page template can be overridden later on the Flatplan or in the Publication Planner, if desired.

6. Click **Create** to insert the section.

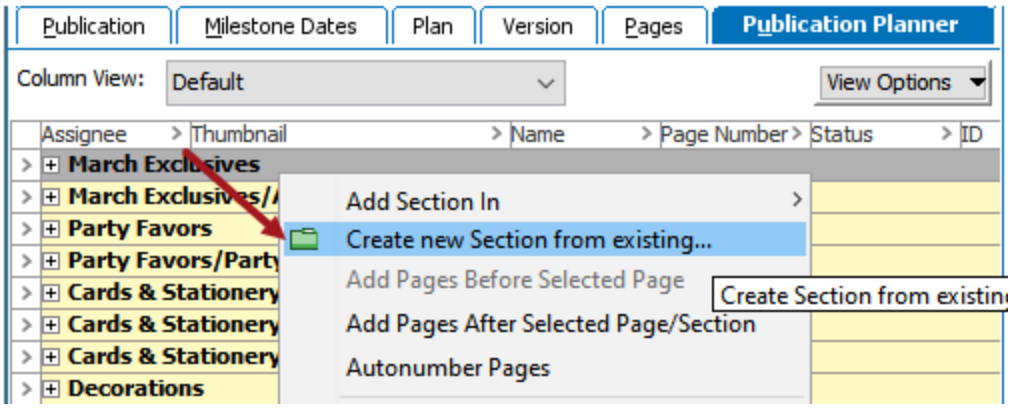
Create New Section From Existing

Creating a new section from an existing section is a useful feature that can help reduce time spent on manual tasks such as:

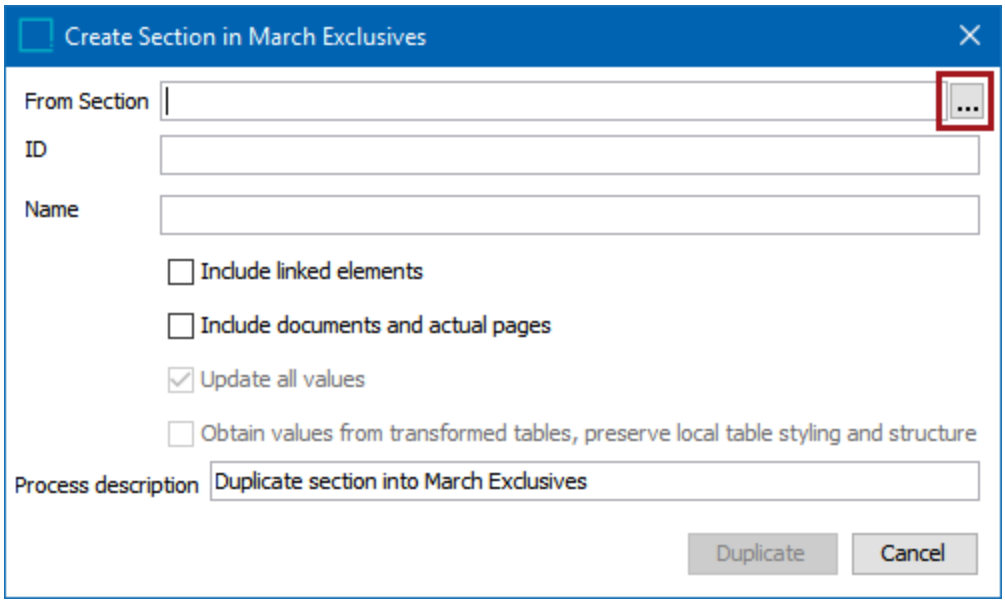
- Reassigning of product templates on Flatplanner pages
- Remounting of attribute values on pages
- Re-saving of InDesign pages into STEP

Creating a new section from an existing one will create a subsection inside of the selected section. To create a new section from an existing one:

1. Either left-click the gray arrow next to the desired section row, or select a section row and right-click.
2. Select **Create new Section from existing…**.



3. In the **Create Section** dialog that displays, click the ellipsis button (...) by the **From Section** field, or, type the name or ID of the section to duplicate into this field. This section can be a different one than the one selected, and can even be from a different publication.



4. Follow steps 4 - 16 in the 'Steps to Create a New Section From Existing' subsection of the **Creating a Section** topic in the **Publication Hierarchy** documentation to finish the process.

Flatplanner Pagination Rules

A pagination rule is a rule that controls how, when, and where objects (typically products, but also assets and classifications) are added to a page.

A pagination rule consists of one or more conditions and an action that takes place if the condition is met. Detailed criteria must be specified for some conditions and actions. Through the use of pagination rules, many actions involved in the mounting of Flatplanner pages can be automated, such as the selection of publication template spread indexes and pre-selection of product templates for Flatplanner page frames.

Unlike AutoPage, pagination rules are optional for Flatplanner. However, they can be useful for reducing manual effort when building Flatplanner planned pages in STEP and mounting actual pages in InDesign.

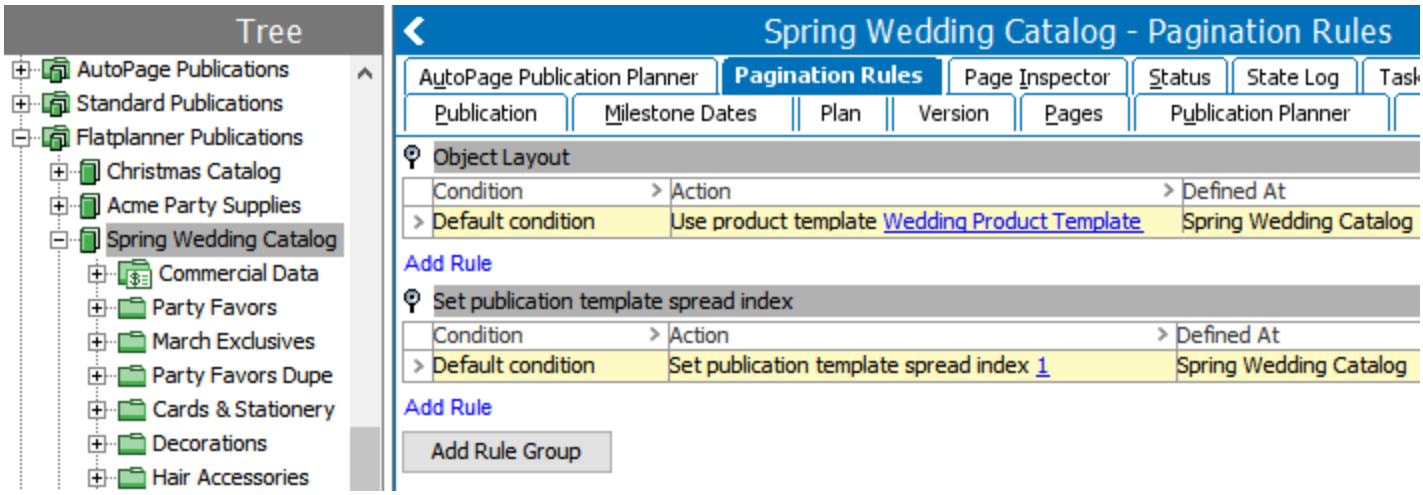
For example, if a publication template stored in STEP is used to build Flatplanner pages in InDesign, pagination rules can be configured to pre-map a publication template spread (spread index) to each publication section, enabling users to automatically generate pages in InDesign using the correct spread. If publication templates are *not* used for page mounting and a mounting page is used instead, then users must first manually create blank pages from the desired master spread in InDesign before creating InDesign pages.

For object layouts, if a pagination rule is set on a publication or section to choose a 'default condition,' then all page frames within the publication or section will be automatically assigned the chosen product template. This avoids the need for manual linking of product templates to page frames. Layout rules can be further refined by assigning a specific product template to frames that meet specified conditions, such as which object type is linked to the frame or the object's placement on the page.

Pagination Rules Tab

Pagination rules are added on the **Pagination Rules** tab, which is available when a publication, section, or subsection is selected in the Tree.

The Pagination Rules tab provides an overview of all conditions and actions applied to the publication and/or section. You can also see where in the publication structure the rules are defined ('Defined At').



Adding Pagination Rules

For information on how to add pagination rules to publications, sections, or subsections, see the **Adding Pagination Rules** topic in the **STEP Publisher** section of this guide.

Pagination Rule Groups

Pagination rule groups are also known as **Action Groups**, since these groups contain selections of **actions** that should be taken on mounted objects and pages. Each group also contains an assortment of **conditions** that are applied to determine exactly how these actions will be carried out.

Two pagination rule groups are available in Flatplanner:

- Object layout
- Set publication template spread index

For detailed information on Flatplanner pagination rule groups and their available conditions and actions, see the **Flatplanner Pagination Rule Groups, Conditions, and Actions** topic.

Pagination Rule Inheritance

Pagination rules are inherited by child sections from parent publications, and by child subsections from parent sections.

For more information, see the **Pagination Rule Inheritance** topic in the **STEP Publisher** section of this guide.

Pagination Rule Evaluation

Pagination rules are evaluated one-by-one in the list from top to bottom. When the condition of a rule evaluates to `True`, the associated action is then evaluated.

For more information, see the **Pagination Rule Evaluation** topic in the **STEP Publisher** section of this guide.

Editing Pagination Rules

For full details on how to edit pagination rules, see the **Editing Pagination Rules** topic in the **STEP Publisher** section of this guide.

Flatplanner Pagination Rule Groups, Conditions, and Actions

Two **pagination rule groups**, also known as Action Groups, are available in Flatplanner:

- Object layout
- Set publication template spread index

Several conditions are available when setting up pagination rules, and for each rule group, a number of actions are available. Conditions affect which actions are taken on objects as they are linked to Flatplanner page frames and/or mounted onto pages in InDesign.

This topic provides an overview of what **conditions** and **actions** are available for the two Flatplanner pagination rule groups.

Object Layout

Object Layout Conditions

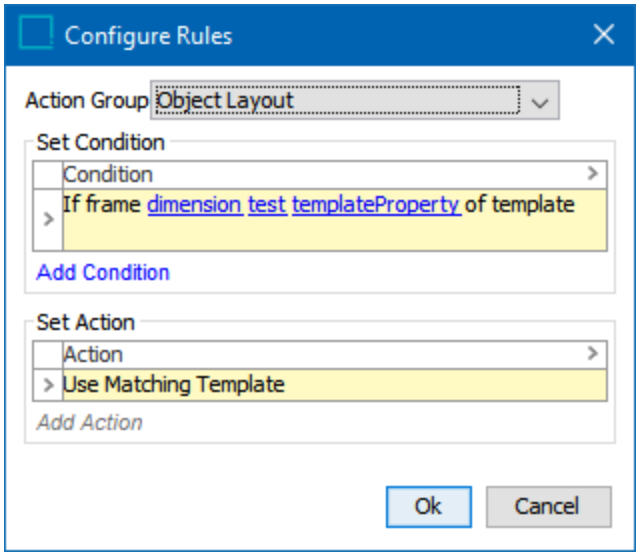
The following table provides a list and description of the Flatplanner pagination rule conditions available for the actions within the Object Layout rule group.

Condition	Description
Default condition	The rule is always applied. There are no specific conditions that must be met.
If first in section	The rule is applied if the object is the first object in the section specified in the condition.
If frame dimensions fit product template min/max dimensions	The rule is applied if the width or the height of the frame meets the specified conditions. For information on how to configure this condition, see the subsection below this table titled 'Configuring "If frame dimensions fit product template min/max dimensions"'
If the object type is	The rule is applied if the object is of the same object type as specified in the condition.
If the object is	The rule is applied if the object is the same as the object specified in the condition.
If the attribute value equals	The rule is applied if the attribute value is the same as the value specified in the condition.

Condition	Description
	Note: This condition does not apply to multi-valued attribute values. I.e., if the value specified in the condition is 'red' and a multi-valued attribute has two values, 'red' and 'blue,' the condition will not match. The value must be exactly as specified, and not a partial match.
If the attribute LOV value equals	The rule is applied if the LOV value ID or the LOV value of the attribute value is the same as the value specified in the condition. The rule matches first on ID and second on value, which allows for matching on values from LOVs that do not use value IDs. **Note** the following considerations for this condition: • It is only valid for LOV-based attributes • It does not apply to multi-valued attribute values. I.e., if the value specified in the condition is 'red' and a multi-valued attribute has two values, 'red' and 'blue,' the condition will not match. The value must be exactly as specified, and not a partial match.

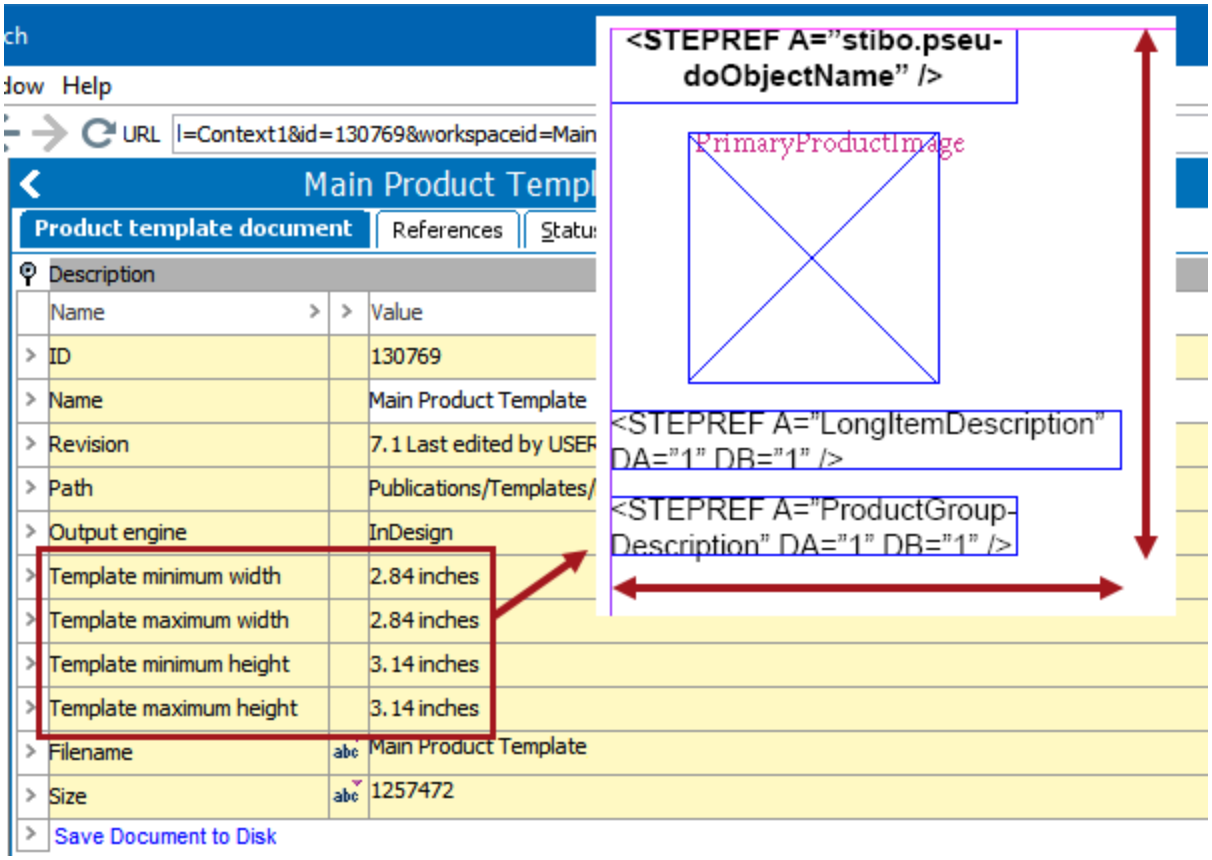
Configuring 'If frame dimensions fit product template min/max dimensions'

When selecting this condition, three additional parameters must be specified under 'Set Condition': **dimension**, **test**, and **templateProperty**, which display as hyperlinks, as shown in the below screenshot. To configure the rule, information must be provided for each parameter. The measurements of the Flatplanner page frames will be tested against the dimensions of the product templates linked to the publication.



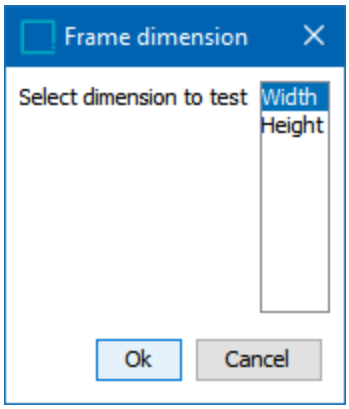
To view the dimensions of a product template, select the template in the Tree and click the **Product template document** tab. The below screenshot illustrates how STEP calculates the width and height of a product template. The **width** is calculated by measuring from the left of the leftmost frame to the right of the rightmost frame in the template. The **height** is calculated by measuring the distance from the top of the topmost frame to the bottom of the bottom-most frame.

Note: Typically, the *minimum width* and *maximum width* values will be identical, and the *minimum height* and *maximum height* values will be identical. However, these values can be manually overridden by re-saving the product template to STEP. For more information on changing these values, see the **Storing and Editing Product Templates** topic in the **STEP Publisher** documentation.

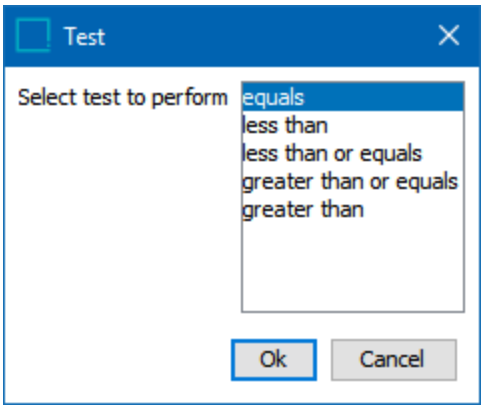


The condition parameters are configured as follows:

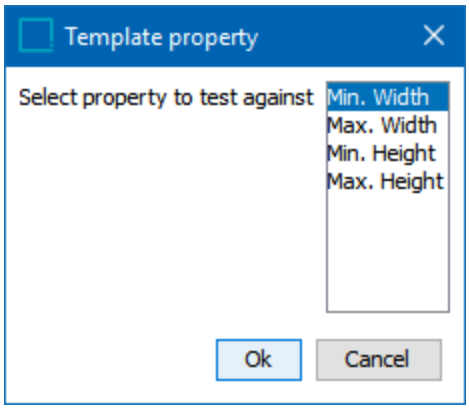
- **Dimension:** For dimension, choose whether you want to test the **width** or **height** of the Flatplanner frame(s) against the product template(s).



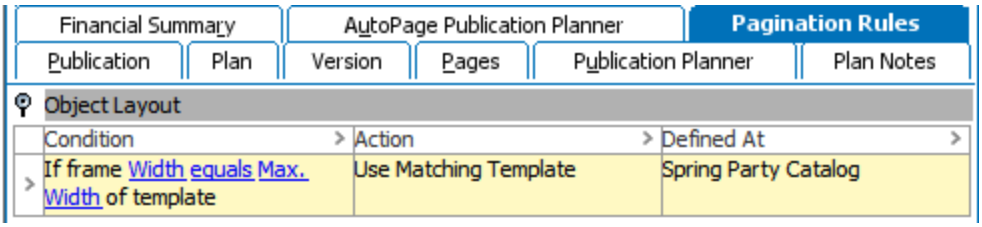
- **Test:** For test, choose whether the width or height of the Flatplanner page frame should be equal, less than, less than or equals, greater than or equals, or greater than the product template dimension chosen for templateProperty.



- **TemplateProperty:** For templateProperty, choose whether the Flatplanner page frame width or height should be tested against the Min. Width, Max. Width, Min. Height, or Max. Height of the product template(s).

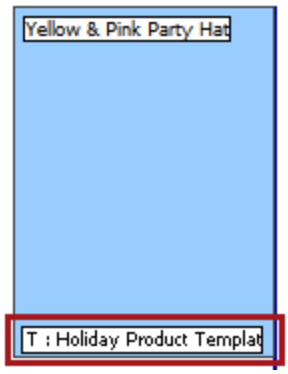


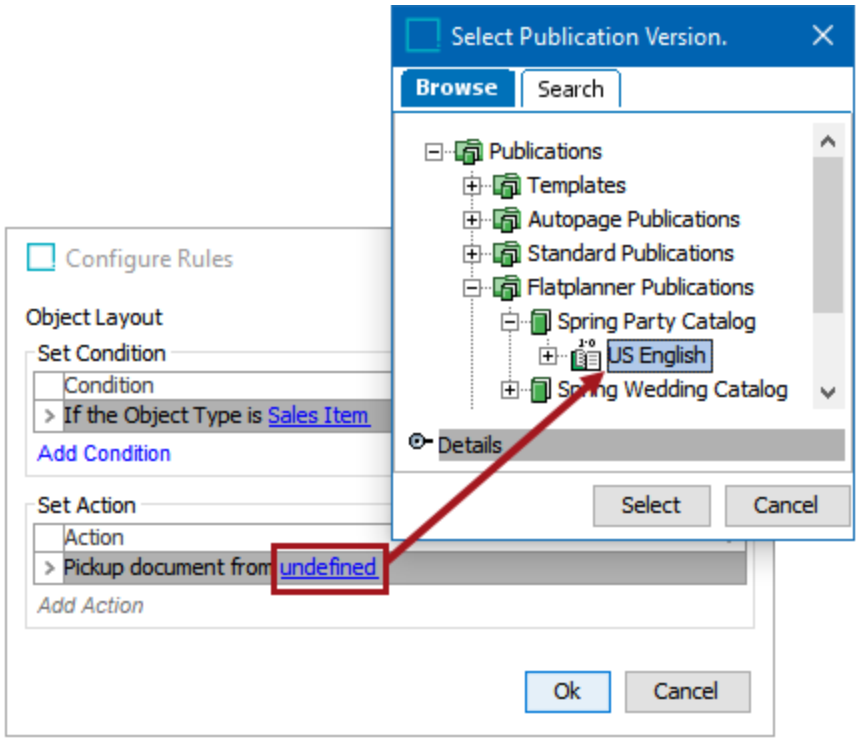
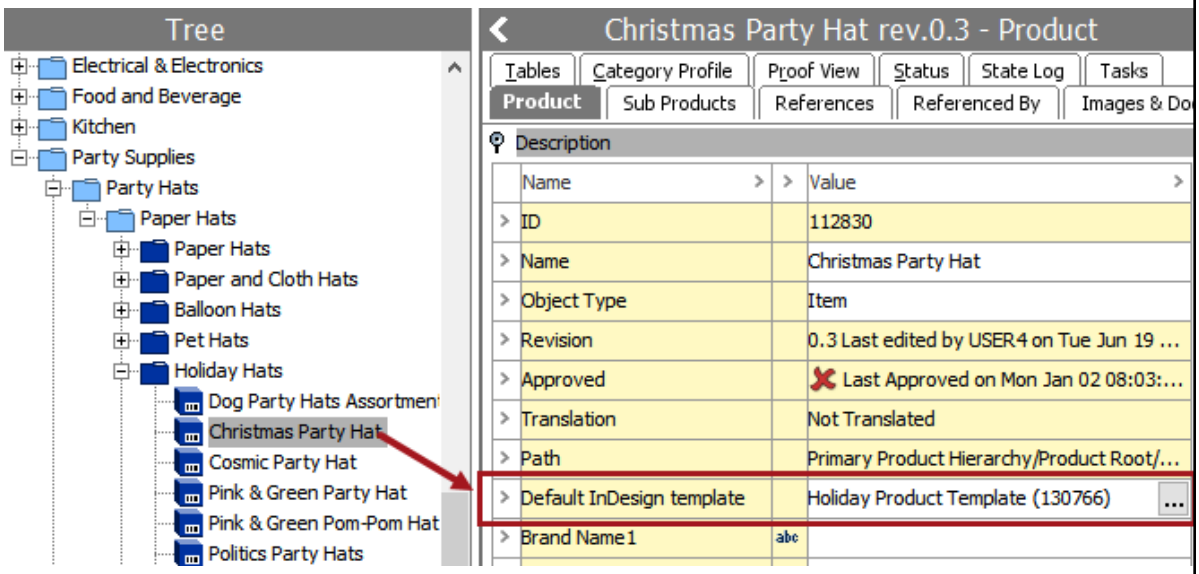
The following screenshot shows an example of a configured rule, using the combination 'If frame width equals Max. Width of template.' The accompanying action will always be 'Use Matching Template.'

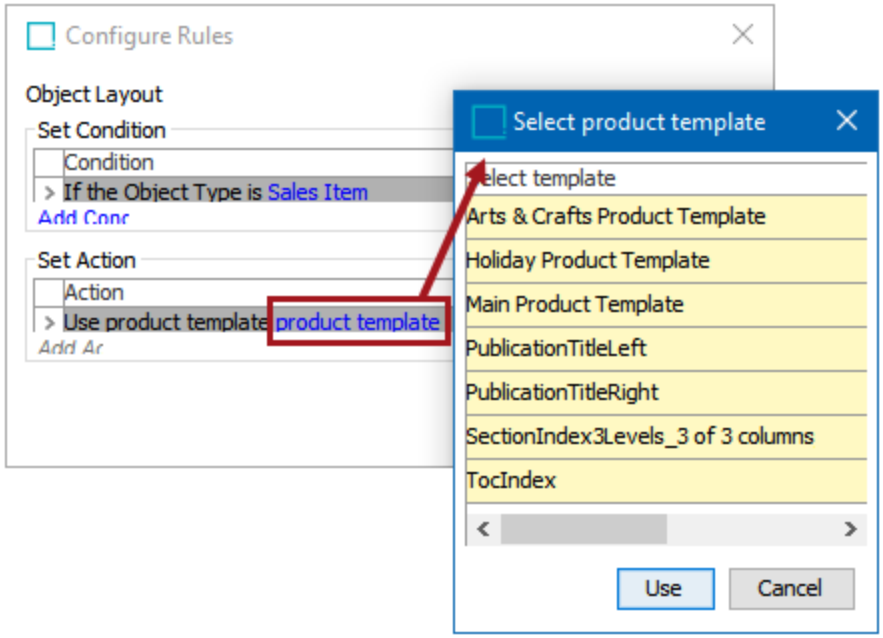


Object Layout Actions

The following table provides a list and description of the Flatplanner pagination rule actions available within the Object Layout rule group.

Action	Description
Keep user assigned template	Uses the template that has already been assigned to the Flatplanner page frame by a user. 
Pickup document	Select this action to reuse the layout of an object as it appears on an actual InDesign page that has previously been saved to STEP. The page will be located within the publication version that you select after clicking 'undefined.' **Note:** A publication *version* must be chosen since an object's final layout on the InDesign page can vary between different versions within the same publication.

Action	Description
	
Use default product presentation	Uses the default product template that has been assigned to the product. 
Use product template	Uses a specific product template from a specified product template. The list of product templates that display when the 'product template' hyperlink is clicked under 'Set Action' are

Action	Description
	the product templates applied to the publication on the **Publication** tab. 
Use Matching Template	Only available for the 'If frame dimensions fit product template min/max dimensions' condition.

Set Publication Template Spread Index

Set Publication Template Spread Index Conditions

The following table provides a list and description of the Flatplanner pagination rule conditions available for the actions within the Set Publication Template Spread Index rule group.

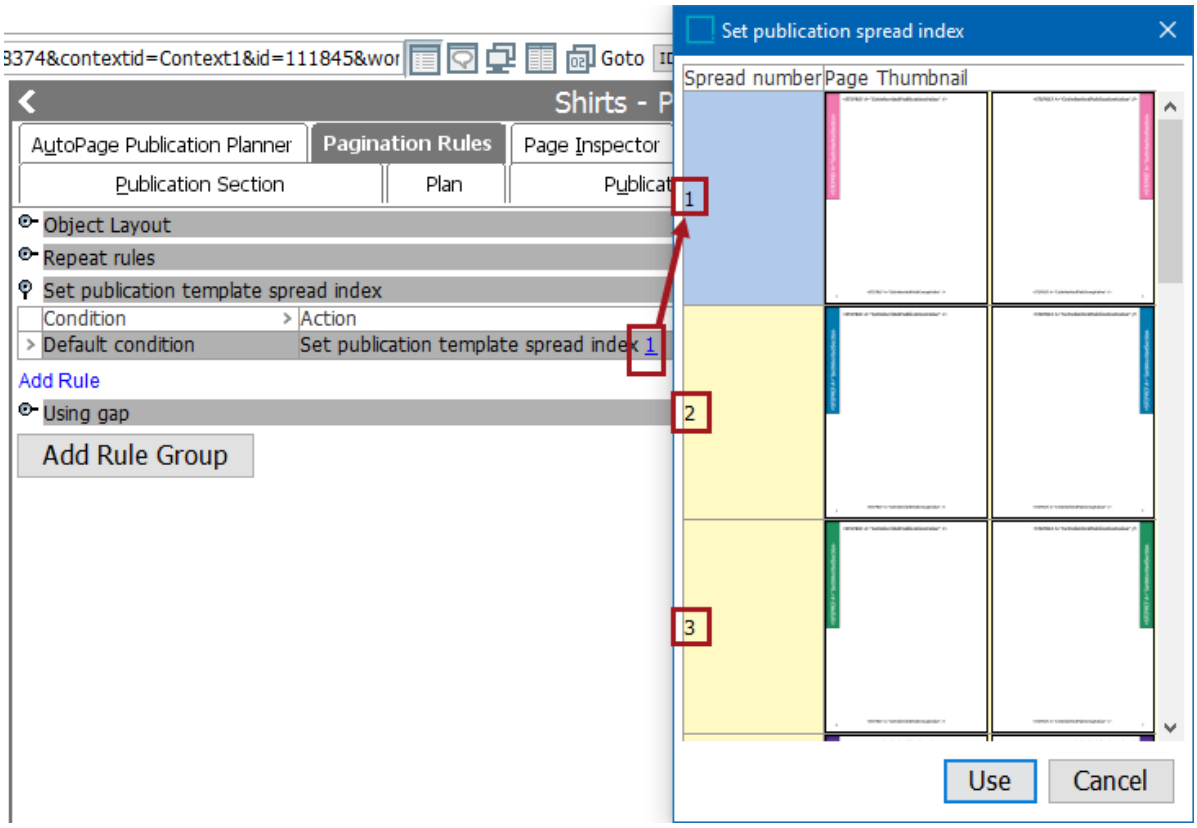
Condition	Description
Default condition	The rule is always applied. There are no specific conditions that must be met.
If the object type is	The rule is applied if the object is of the same object type as specified in the condition.

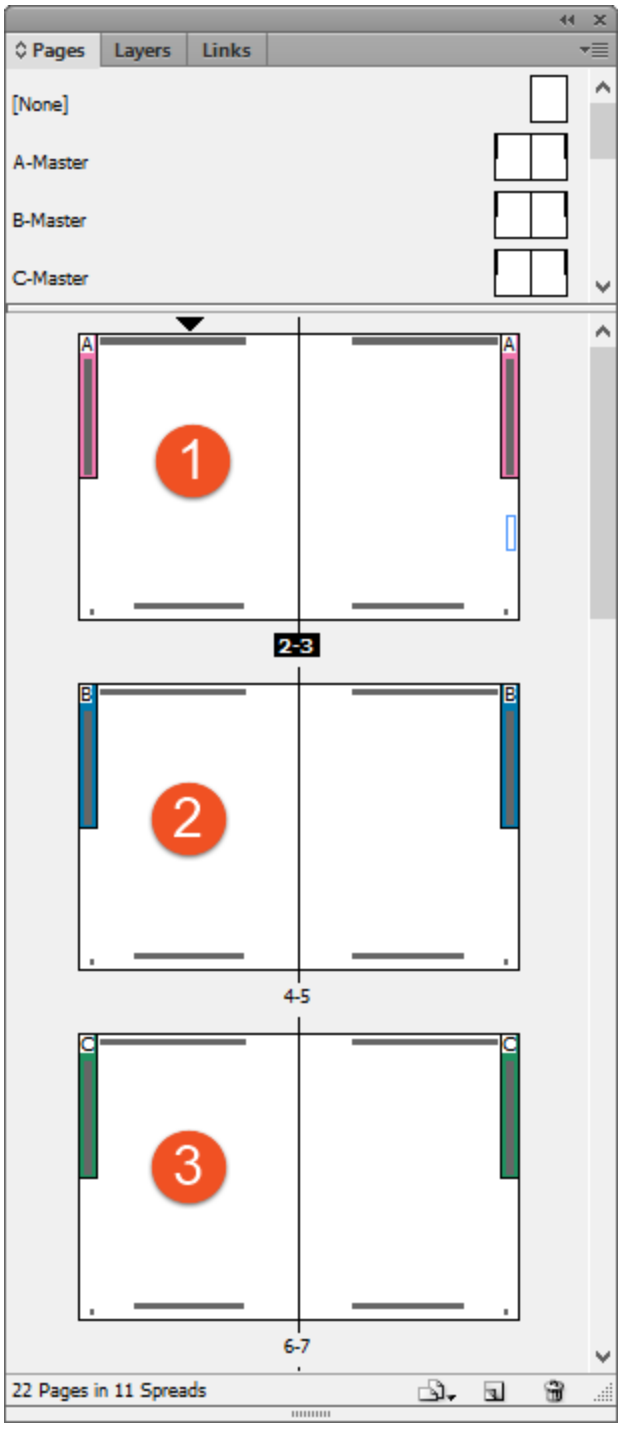
Condition	Description
If the attribute value equals	The rule is applied if the attribute value is the same as the value specified in the condition. **Note:** This condition does not apply to multi-valued attribute values. I.e., if the value specified in the condition is 'red' and a multi-valued attribute has two values, 'red' and 'blue,' the condition will not match. The value must be exactly as specified, and not a partial match.
If the attribute LOV value equals	The rule is applied if the LOV value ID or the LOV value of the attribute value is the same as the value specified in the condition. The rule matches first on ID and second on value, which allows for matching on values from LOVs that do not use value IDs. **Note** the following considerations for this condition: • It is only valid for LOV-based attributes • It does not apply to multi-valued attribute values. I.e., if the value specified in the condition is 'red' and a multi-valued attribute has two values, 'red' and 'blue,' the condition will not match. The value must be exactly as specified, and not a partial match.

Set Publication Template Spread Index Actions

Only one action is available in this rule group, 'Set publication template spread index.'

Action	Description
Set publication template spread index	This action specifies which spread within a publication template should be used when Flatplanner pages are built in InDesign. The most common use case for this action is to assign different publication spreads to different sections within a publication. A publication template often consists of several spreads, containing thumb tabs for each chapter. A typical setup in InDesign would be as follows: a page spread created from master spread A would equal spread index number 1, a spread created from master spread B would equal index spread number 2, and so forth. The following screenshot shows the view in the workbench when a publication template spread index is selected.

Action	Description
	 This screenshot shows the corresponding 'spread indexes' of the publication template in InDesign, as viewed from the **Pages** panel.

Action	Description
	

Reapplying Layout Rules

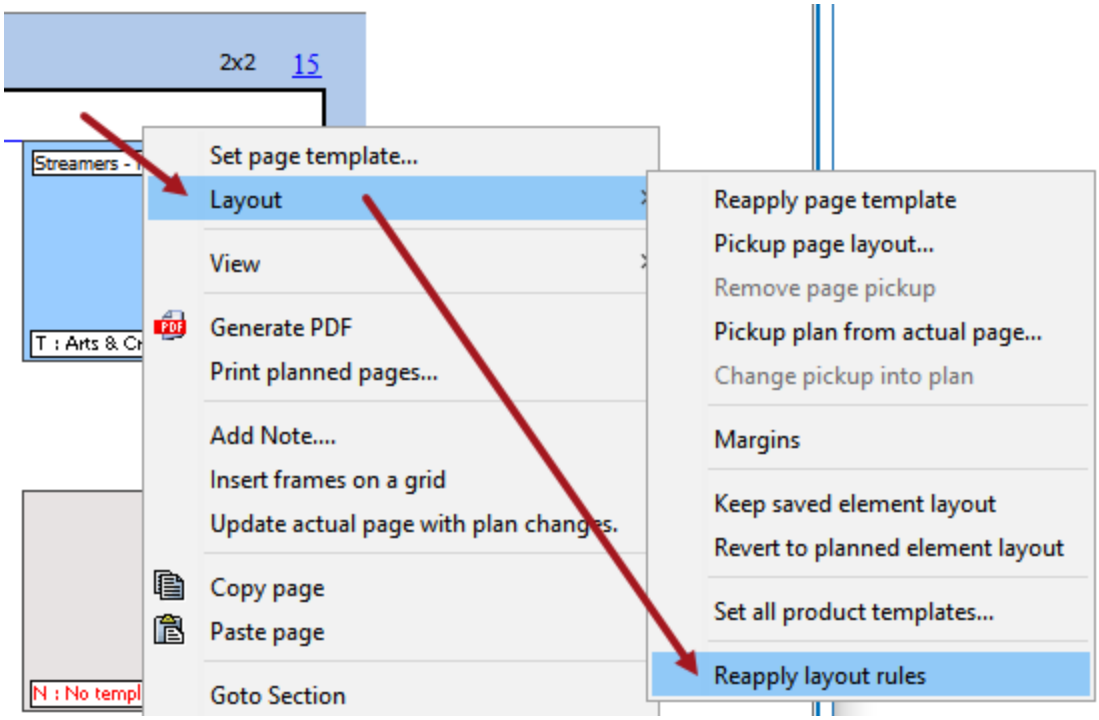
If a product template applied to a page frame is changed by a user so that it no longer matches the template specified in the Object Layout pagination rule, the **Reapply layout rules** feature can be used to revert the assigned product template back to the template specified in the pagination rule.

Note: Product templates cannot be reapplied to frames using Reapply layout rules unless the system setting **Reapply Flatplan rules when adding product to non-empty frame** is set to **Y** under System Setup > Users and Groups > Flatplanner Default Settings. For information on this setting, see the **Flatplanner Default Settings** topic in the **System Setup / Super User Guide** documentation.

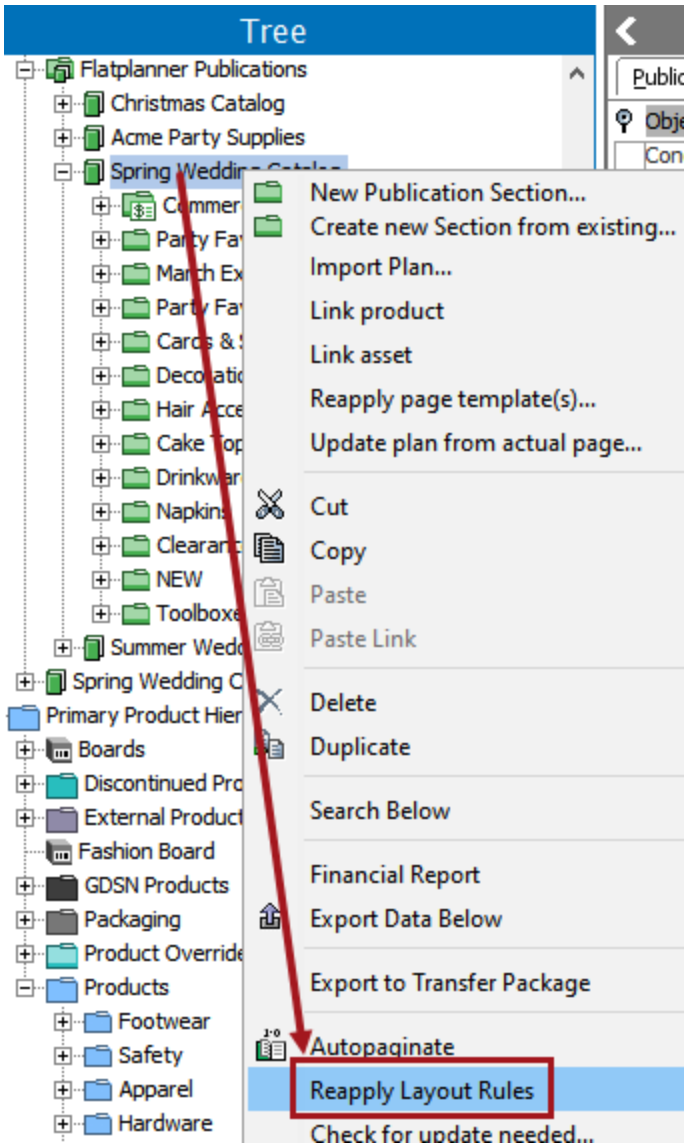
Using the Reapply Layout Rules Feature

The 'Reapply layout rules' feature automatically reapplies the product template specified in the pagination rule. This feature is available in the following locations in the workbench:

- On **planned pages**, both in the Plan view and Sticker Book view. Right-click on a white area of the planned page, then select Layout > **Reapply layout rules**.



- In the **Tree**, by right-clicking on either a publication or section object and selecting **Reapply Layout Rules**.

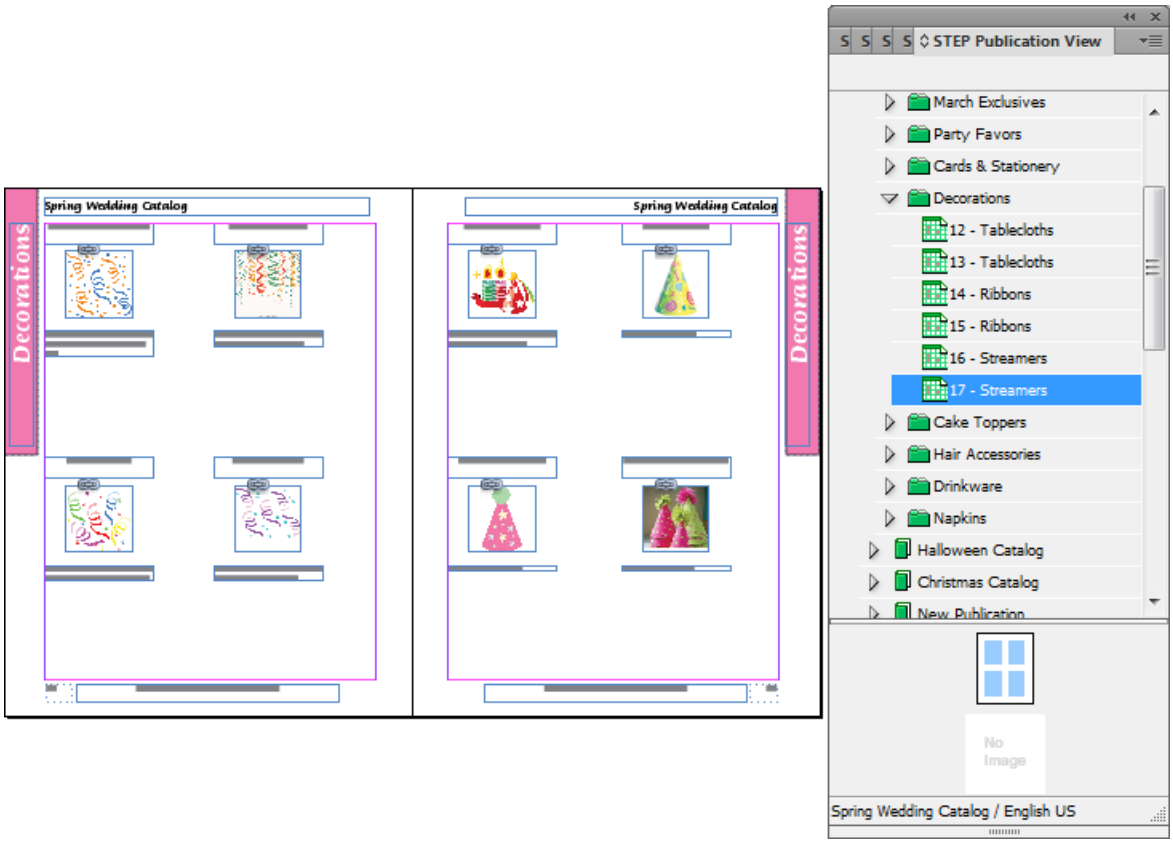

Tree
Flatplanner Publications
Christmas Catalog
Acme Party Supplies
New Publication Section...
Create new Section from existing...
Import Plan...
Link product
Link asset
Reapply page template(s)...
Update plan from actual page...
Cut
Copy
Paste
Paste Link
Delete
Duplicate
Search Below
Financial Report
Export Data Below
Export to Transfer Package
Autopaginate
Reapply Layout Rules
Check for update needed...
Primary Product Hier
Boards
Discontinued Pro
External Product
Fashion Board
GDSN Products
Packaging
Product Override
Products
Footwear
Safety
Apparel
Hardware

Finalizing Pages in InDesign

Pages created with Flatplanner are finalized in InDesign using standard InDesign tools in combination with the STEP Publisher (STEP'n'design) plugins. These plugins enable you to connect to STEP and work with InDesign documents as dynamic documents.

This functionality provides a number of advantages, including:

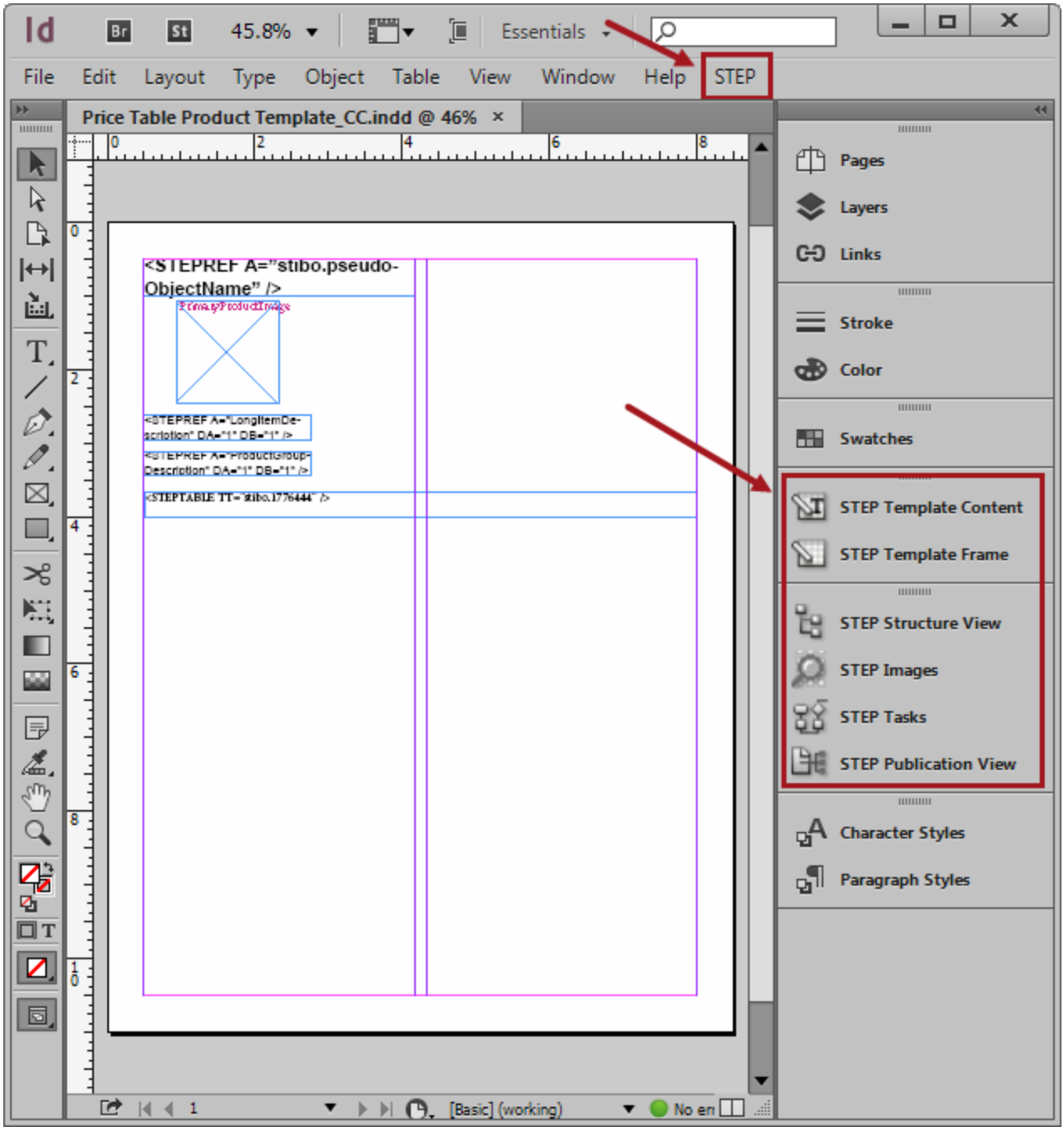
- Access to approved text and images that are ready for layout
- The ability for DTP users to view notes and comments on mounted InDesign pages, which were added to Flatplanner planned pages in STEP by non-DTP users
- The ability to save finalized documents back to STEP, enabling space usage data to be calculated automatically



Overview of the STEP Menu in InDesign

- When the STEP Publisher plugins are installed in InDesign, a STEP menu is added to InDesign's menu bar. The STEP menu gives you access to specific STEP Publisher functions and enables you to perform a range of operations on the active InDesign page.

- The STEP **panels** are used for actual mounting of STEP data, including template composition and image mounting. The STEP panels consist of six different tabs: STEP Structure View, STEP Template Content, STEP Template Frame, STEP Images, STEP Tasks, and STEP Publication View. The tabs are used like other InDesign panels.



For more information, see the following **STEP Publisher** introductory topics:

- Installing STEP Publisher
- Description of the InDesign Interface

Mounting Planned Pages

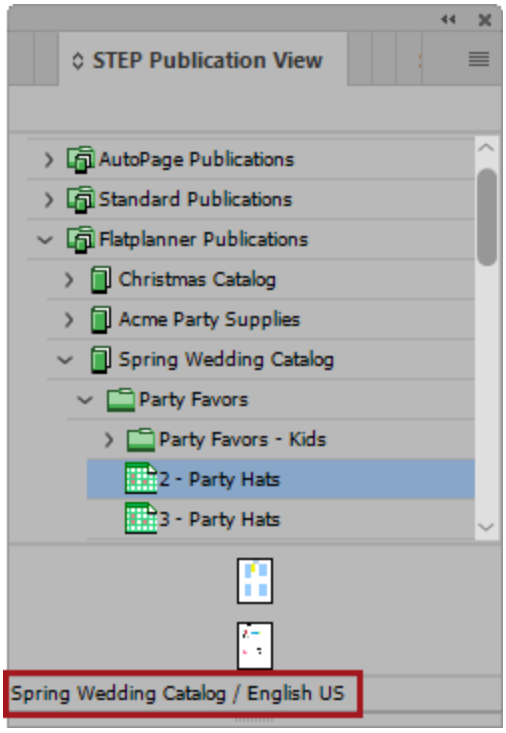
This section provides information about mounting planned pages and finalizing pages in InDesign when working with Flatplanner. It also contains a description of how to update planned pages and how to use a workflow when using Flatplanner.

This topic assumes the following:

- Products have already been linked to frames on Flatplanner planned pages
- You have already logged into the relevant STEP system from InDesign using the STEP'n'design plugin

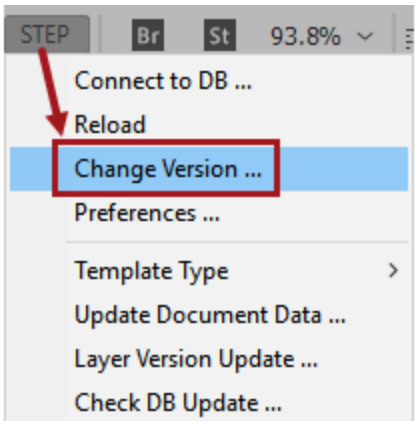
Publication Versions

Before mounting pages, make sure that you are working in the correct publication **version**. The current version is displayed at the bottom of the STEP Publication View panel (e.g., 'Spring Wedding Catalog / English US').

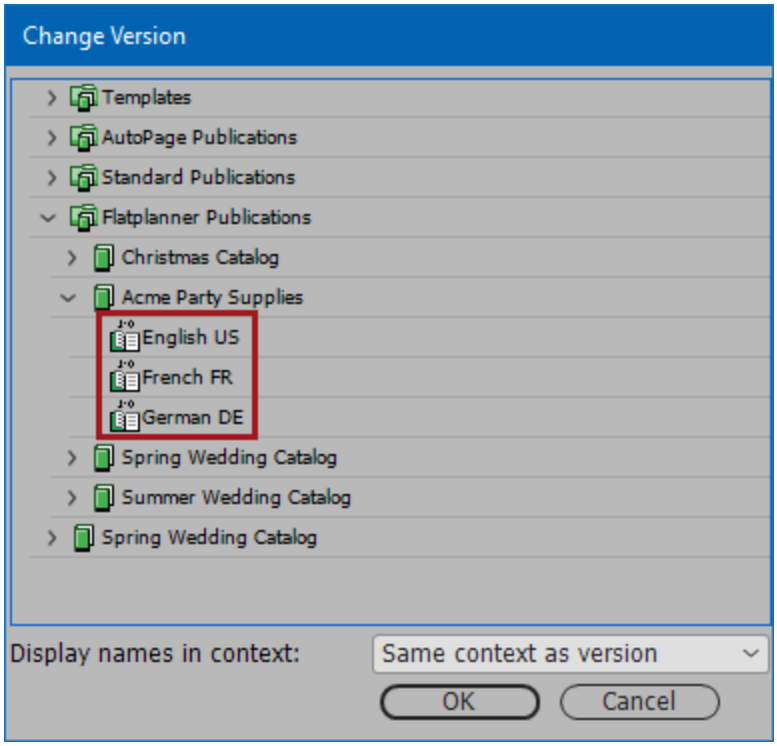


If you are not currently working in the correct version, you will need to change it to the correct one. To change your version:

1. In InDesign, navigate to STEP > **Change Version**.



2. In the **Change Version** dialog, navigate to the relevant publication and select the desired version, then click **OK**. The below screenshot shows an expanded publication with three versions.



For more information on publication versions, see the **Publication Versions** topic in the **STEP Publisher** / **Publication Hierarchy** documentation. For information on the 'Display names in context' option on the Change Version dialog, see the **Description of the InDesign Interface** topic in the **STEP Publisher** documentation.

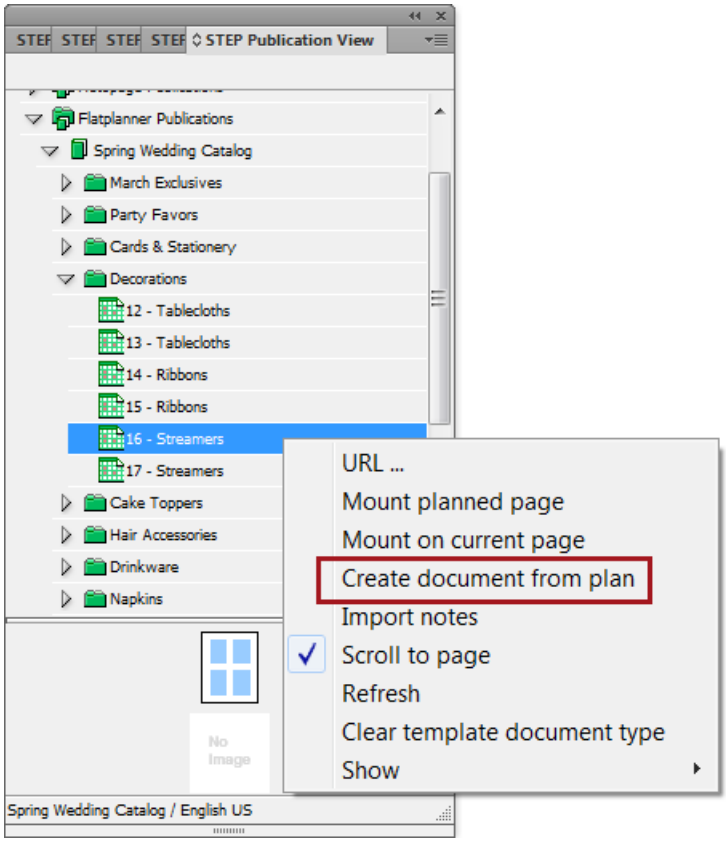
Mounting Planned Pages Using a Stored Publication Template

If using a publication template already stored in STEP, there is no need to have an InDesign document already open to mount your pages. In fact, there is no need to even have the templates saved on your local computer if you are solely using templates stored in STEP.

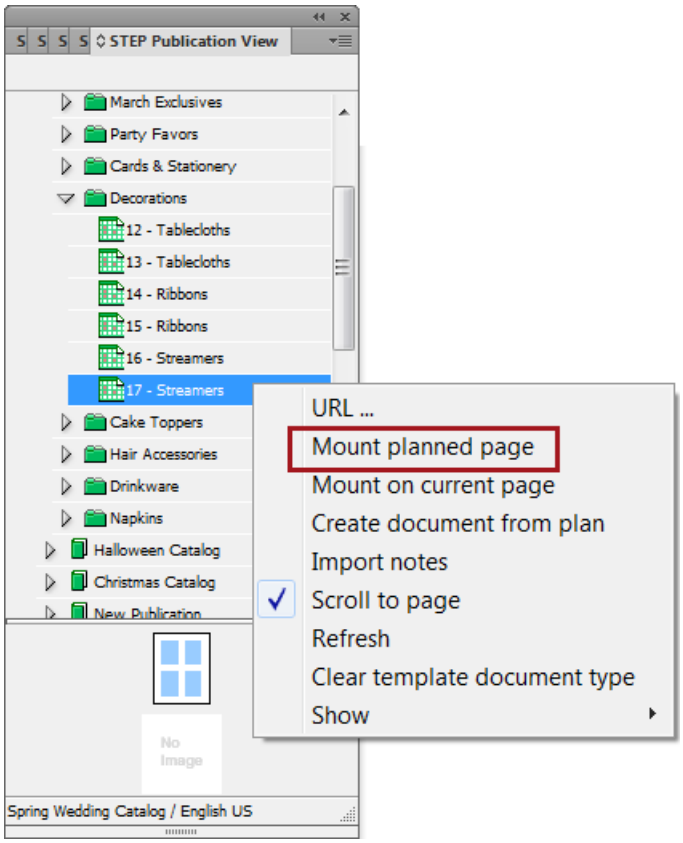
Follow these steps to mount a planned page in InDesign by using documents stored in STEP and not on your local computer.

Note: When using this method, you should mount the left side of a spread first (the even-numbered page), then the right side (odd-numbered) next.

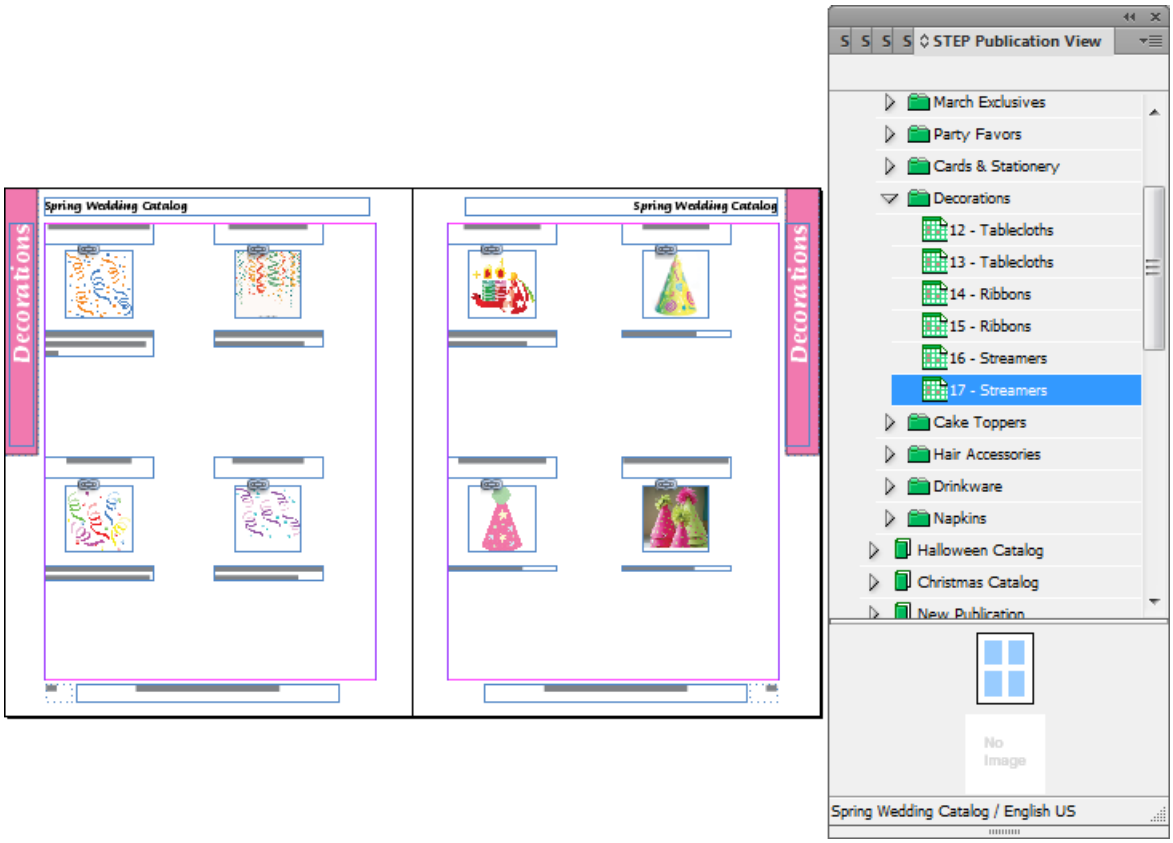
1. In InDesign, navigate to the STEP Publication View panel by navigating to Window > **STEP Publication View** from the InDesign application bar across the top of the InDesign interface.
2. In the **STEP Publication View** panel, navigate to the even-numbered page that you would like to mount, then right-click and select **Create document from plan**. You can also access **Create document from plan** by clicking on the **options** dropdown menu in the upper right corner of the STEP Publication View panel.



3. In a few moments (depending on your system's speed), the InDesign page will generate in the background, then automatically open with the mounted Flatplanner content. This page (the even-numbered one) will be a single page.
4. To mount the second page in the spread, right-click on the next page (the odd-numbered page) in the STEP Publication View, then click **Mount planned page.**



5. In a few moments (depending on your system's speed), the second InDesign page in the spread will generate in the background, then automatically open as the right page of the spread, complete with its mounted Flatplanner content.



6. Make additional changes to the document as needed. These changes could include adding standalone graphics, manually manipulating the layout of objects, or even dragging and dropping additional elements onto the page from the **STEP Structure View** or **STEP Images** panels. These manual page changes will be recognized by STEP after the document has been saved to the database, and the updated page layout can be reused on other pages by picking up the layout.
7. Save the document locally on your computer, then save back to STEP in the same section where the plan is stored. The actual page will then be linked to the plan in STEP. See the 'Saving the Mounted Spread to STEP' section later in this topic for instructions.

Mounting Planned Pages Using a Mounting Page

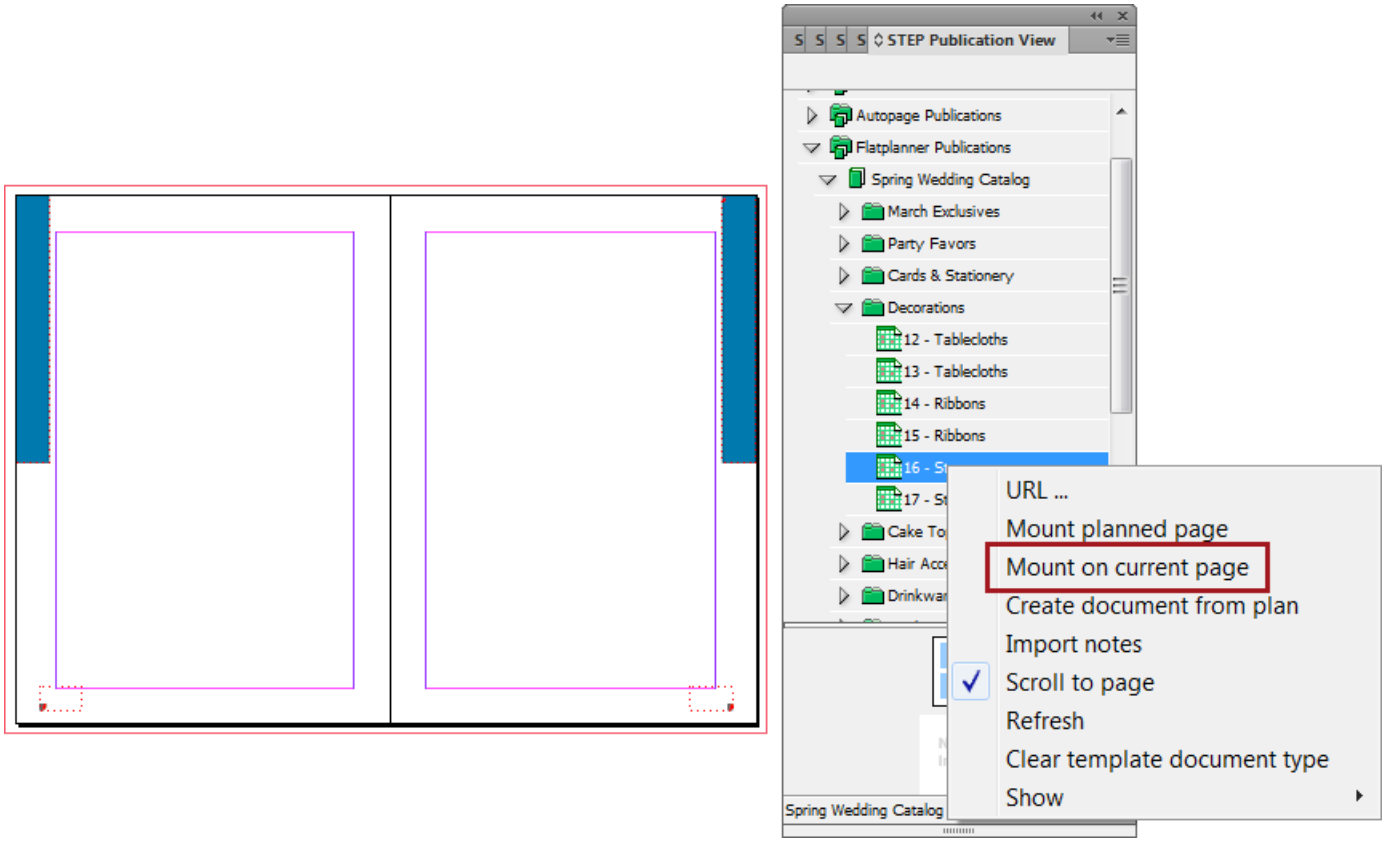
Even though a publication template is required to be stored in STEP in order to create publications and generate proof views, designers often choose to build pages using a document called a **mounting page**. A mounting page is not generated using STEP Publisher, nor is it saved into STEP. However, it functions like a publication template in that it contains all the paragraph styles, swatches, background elements, etc., that would typically be included on a publication template.

Note: If you would like to mount metadata (description) attribute values from a publication, section, or planned page object onto your InDesign page, the associated STEP Publisher tagging must be present on the publication template and/or page template(s) that are *stored in STEP* and linked to your publication. This information cannot be mounted to the InDesign page using a mounting page alone.

Follow these steps to mount a planned page in InDesign by using a **mounting page** that is saved on your local machine:

1. With your mounting page open in InDesign, navigate to the STEP Publication View panel by navigating to Window > **STEP Publication View** from the InDesign application bar across the top of the InDesign interface.
2. In the **STEP Publication View** panel, navigate to the page that you would like to mount.
3. Select the InDesign page (left or right side of your mounting page) onto which you would like to mount the Flatplan.
4. Right-click your page in the STEP Publication View panel and select **Mount on current page**. You can also access **Mount on current page** by clicking on the **options** dropdown menu in the upper right corner of the STEP Publication View panel.

> **Note:** If the Flatplan mounts on the incorrect page, navigate to the Pages panel in InDesign (Window > Pages) to ensure that the correct InDesign page is selected.



5. Follow the same steps for the other side of your spread.
6. Make additional changes to the document as needed. These changes could include adding standalone graphics, manually manipulating the layout of objects, or even dragging and dropping additional elements onto the page from the **STEP Structure View** or **STEP Images** panels.

7. Save the document locally, then save it into STEP. See the 'Saving the Mounted Spread to STEP' section later in this topic for instructions.

Mounting Planned Pages Using a STEP Workflow

Flatplanner workflows can be configured with built-in functionality to automatically mount planned pages using an InDesign server, which is linked to the STEP application server as a sidecar. When InDesign pages are automatically built by an InDesign server, the workflow tasks performed by DTP users of Flatplanner workflows include opening pre-mounted pages and making layout adjustments to them before saving back to STEP.

For more information on how to open pre-mounted pages in InDesign in conjunction with the Flatplanner workflow, as well as save these pages back to STEP once completed with the workflow task, see the **Flatplanner Workflows** documentation.

Saving Mounted Planned Pages to STEP

Once your planned page has been mounted in InDesign and all necessary changes have been made on the page, the typical next step is to save it back to STEP as an actual page.

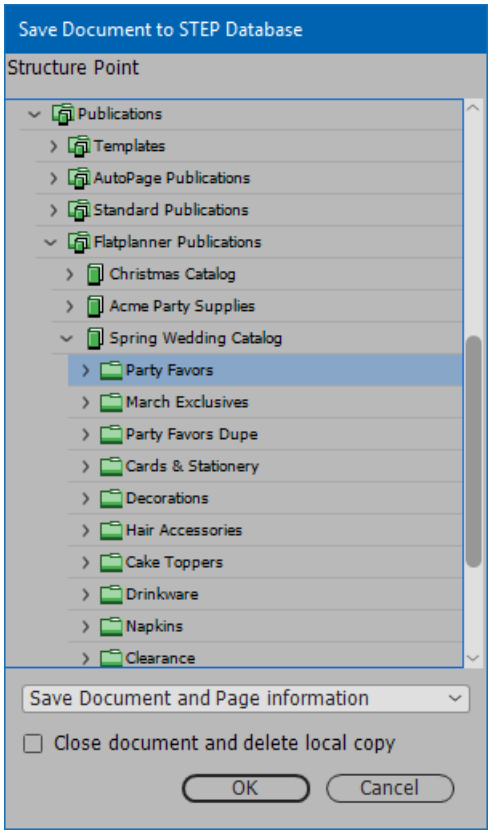
Though it is optional to save mounted InDesign documents back to STEP, these documents must exist in STEP in order to take full advantage of STEP's publishing capabilities, such as the extraction of product indexes and calculation of space usage.

To save a mounted InDesign document back to STEP, follow these steps:

1. With your mounted document open in InDesign, first save it to your local computer.

   Note: InDesign documents must first be saved locally before they can be saved to STEP.

2. Next, navigate to STEP > **Save Document to DB** from the **STEP** menu (which appears in the InDesign application bar across the top of the InDesign interface). The **Save Document to STEP Database** dialog box displays. The section folder from which you mounted your planned page should be automatically selected. If not, navigate to the correct section.



3. From the dropdown list, select **Save Document and Page Information** (default) or **Save Page Information**.
   - Choose **Save Document and Page Information** to save page information (such as page numbers and space allocation) into STEP as well as the actual InDesign page itself. This option stores these documents in the database for you and other users to access later.
   - Select **Save Page Information** if you would only like to save page information into STEP. This option will save a thumbnail of your page to STEP but not the actual InDesign page itself. Some users may prefer this option in order to save space on their STEP application server.
4. Check **Close document and delete local copy** if you would like to save the document to STEP, then have the local copy automatically deleted from your computer.
5. Click **OK**. The document is saved back to STEP within the correct publication.

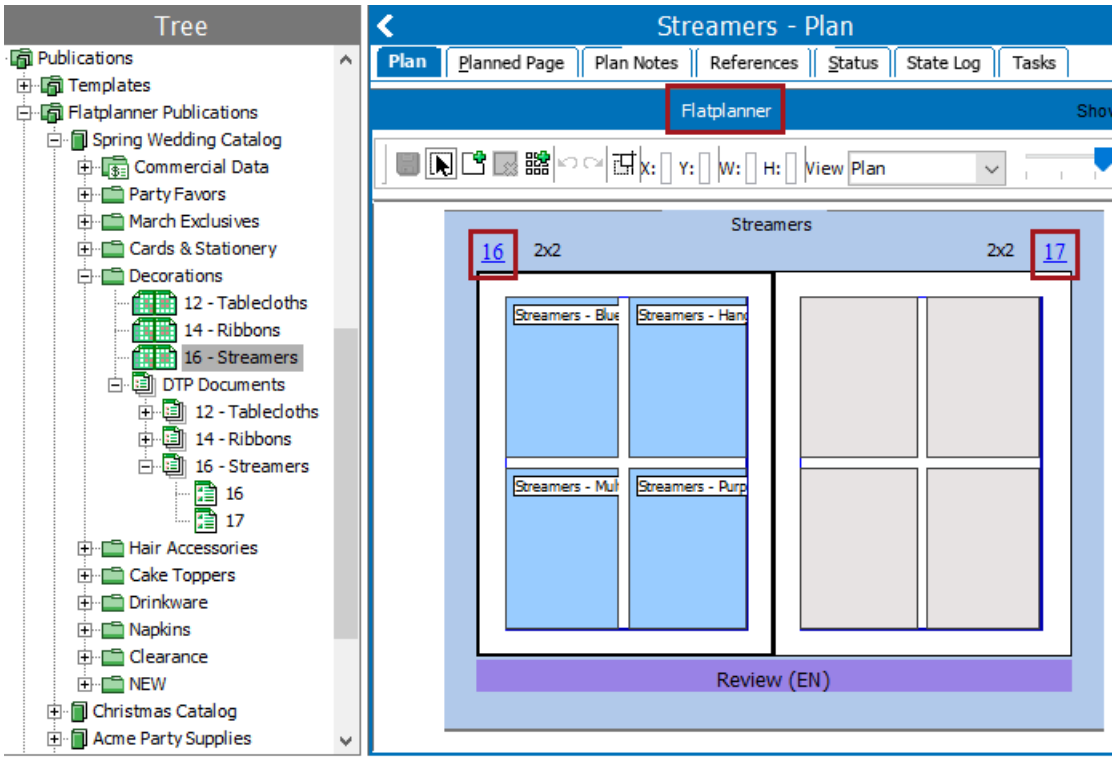
Note: Once mounted pages from a Flatplan are saved back into STEP, the frames on the Flatplanner page (in the Plan view) now display 'Keep Layout' instead of the name of the product template that was previously applied to the frame. If the planned page is mounted again, the layout from the saved actual page will be used instead of the layout from the original product template. For more information about layout rules and reusing saved layouts, see the **Reusing Saved Layouts** topic.

Viewing Mounted Actual Pages in STEP

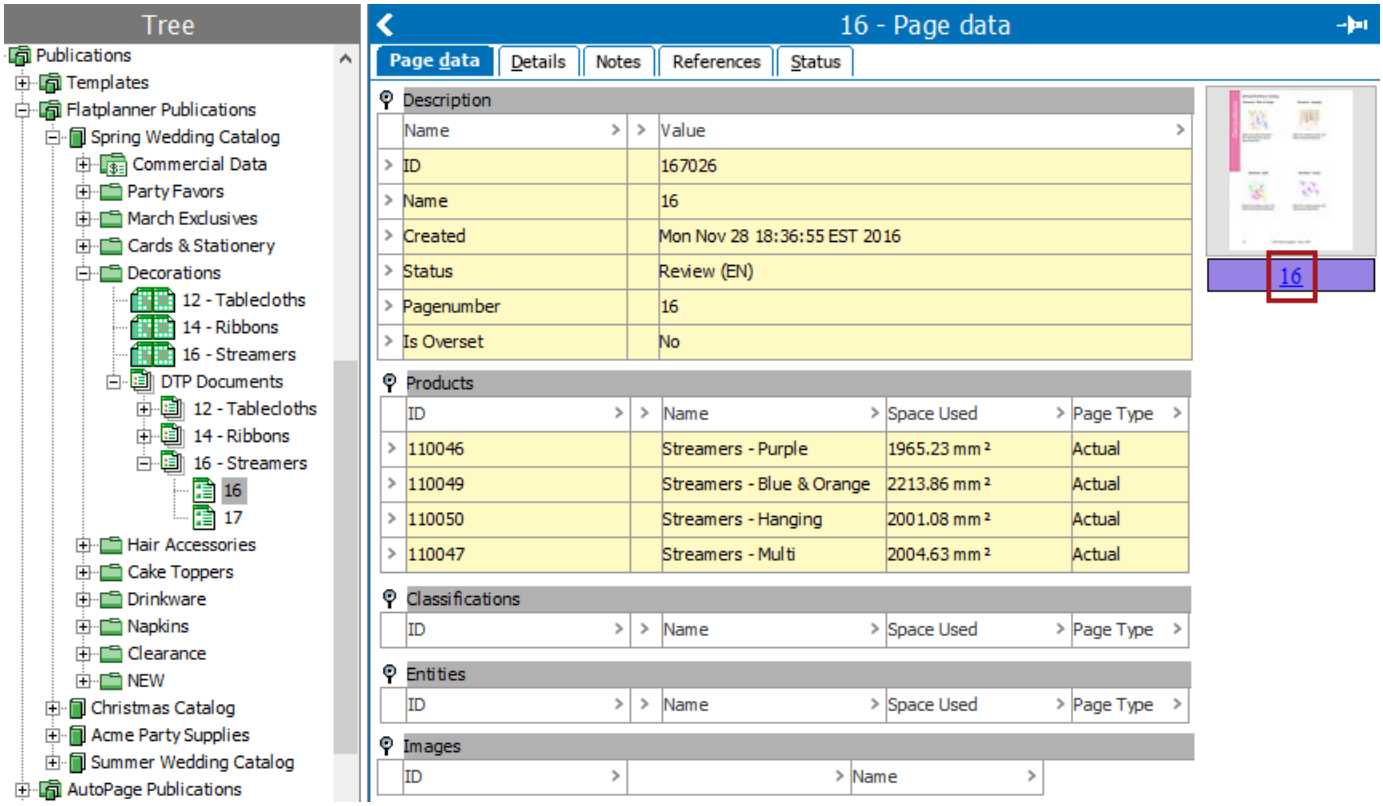
Mounted InDesign pages that are saved back to STEP are linked back to their original Flatplans through hyperlinks and can be viewed in multiple locations in STEP. The linking that exists between actual pages and Flatplans enables easy toggling between the original plan and the actual page.

The following list shows how actual pages, once saved back to STEP, are linked to Flatplans:

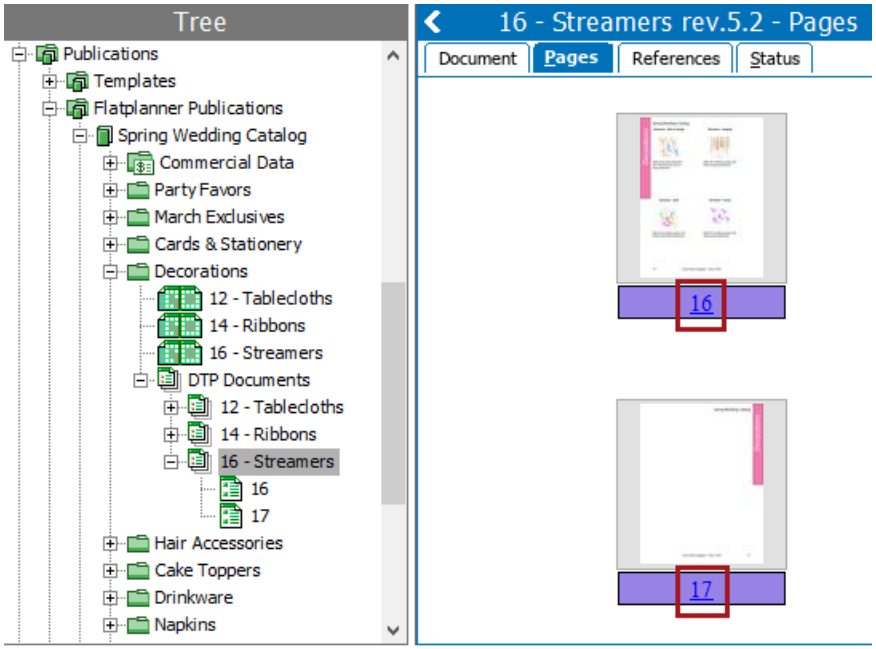
1. In the **Flatplanner**, hyperlinked page numbers appear in the upper left- and right-hand corners in all Views (Plan, Preview, Sticker Book, and Mounted Pages).



2. Click one of these hyperlinked page numbers to go to the **Page data** tab of the actual page. Click the page hyperlink below the actual page thumbnail to return to the Flatplan.



3. With the actual page **document** selected in the Tree, hyperlinks to the Flatplan appear beneath the thumbnails of the actual pages on the **Pages** tab.

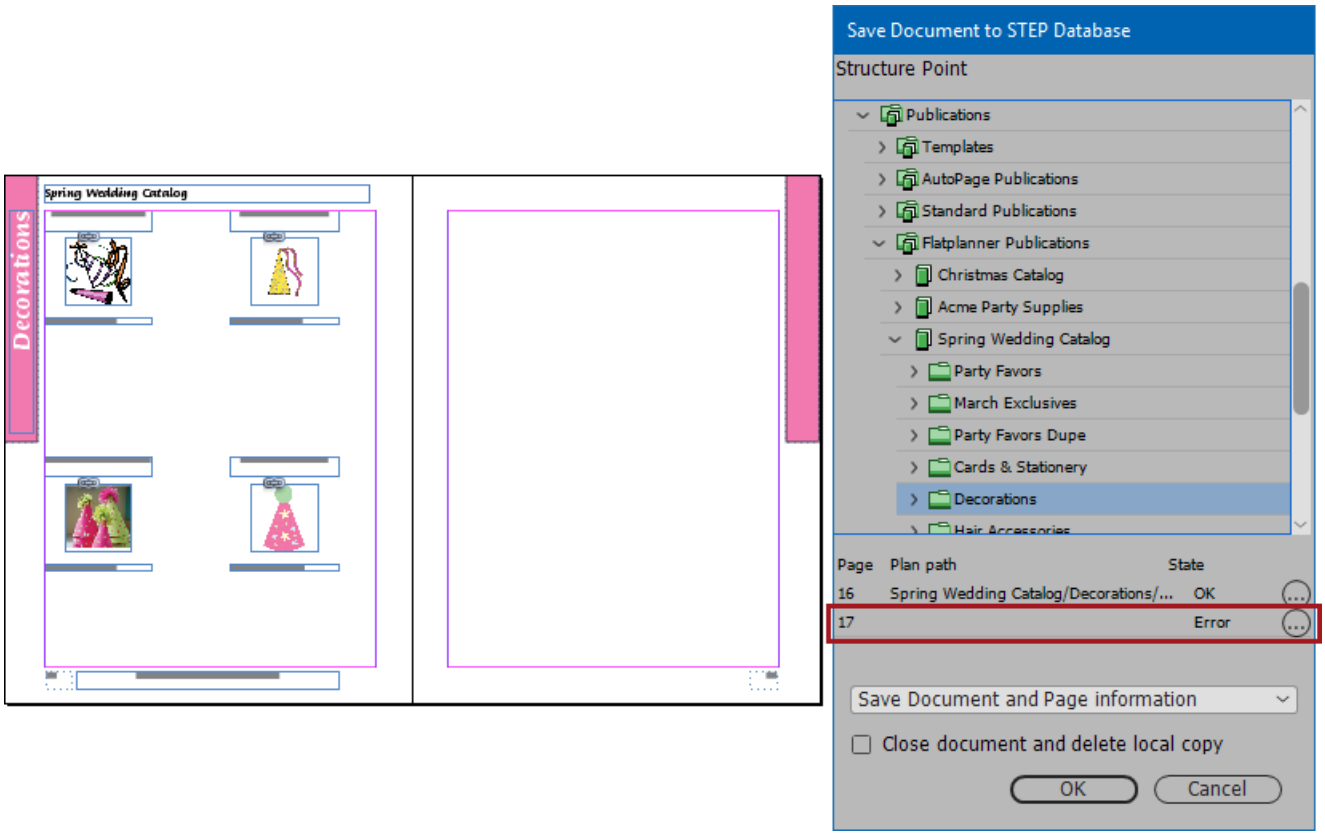


Saving Empty Mounted Pages Back to STEP

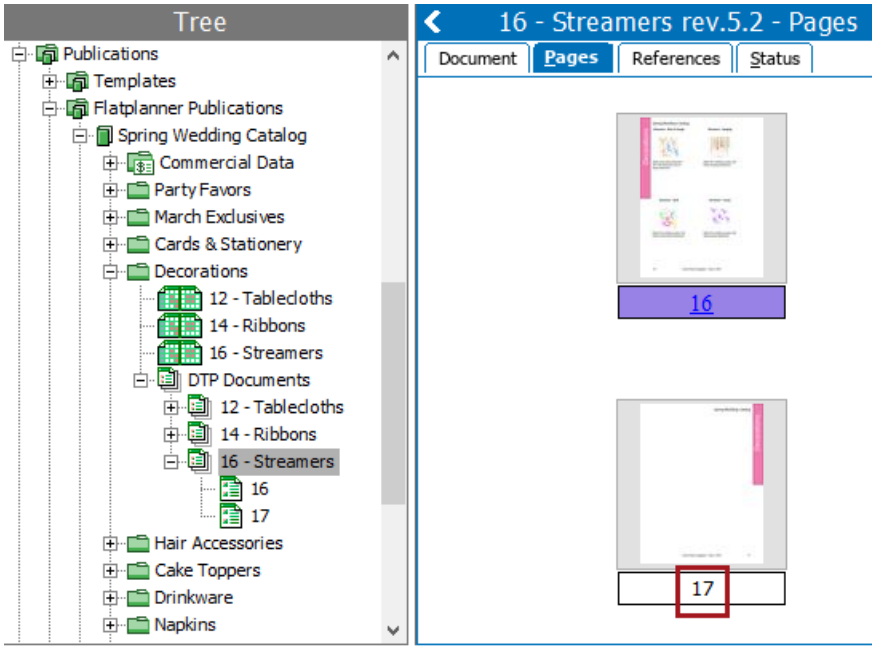
Pages in Flatplanner spreads must sometimes be left empty in order to allow space for content outside of STEP. Examples of content that designers may add from outside of STEP include full-page graphics or advertisements. A spread with an empty page is saved back to STEP in the same fashion as if both pages in the spread contained content.

Sometimes, however, an **Error** warning (outlined in the below screenshot) will appear when saving back an empty page. This typically happens if the empty page was manually added to the spread in InDesign (or was already present in the mounting page) and was not mounted from an empty Flatplan, i.e., a Flatplan that contains frames but has no linked products.

Note: Another issue that causes an error to display in the Save Document to STEP Database dialog is if you attempt to save the mounted page to an incorrect section, i.e., a section that does not contain the plan that you just built your page from.

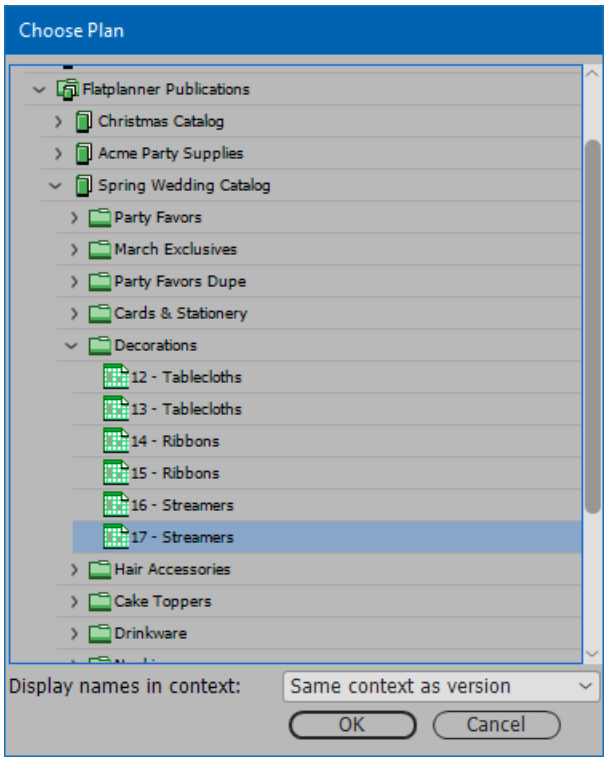


If you receive this error and ignore it, your empty actual page will be saved back to STEP but there will be no hyperlinks connecting it to the Flatplan, as pictured below:

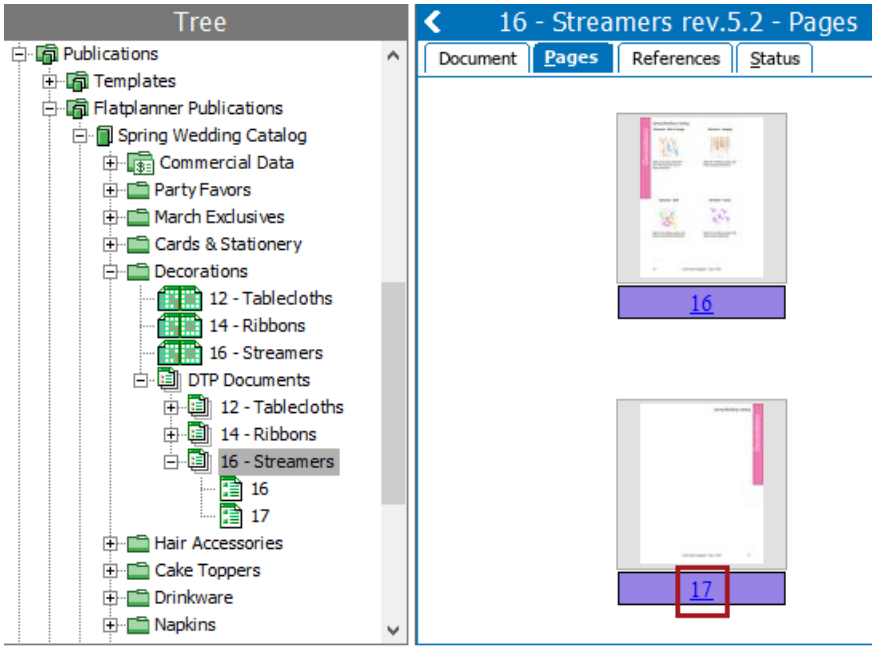


If you receive this error and would like to have your empty actual page linked to a Flatplan in STEP, follow these steps:

1. Click the ellipsis button (...) next to the **Error** status (outlined with a red frame in the first screenshot in this section). The **Choose Plan** dialog displays.
2. In the **Choose Plan** dialog, navigate to the Flatplan (planned page) to which you would like to link your actual page, then click OK.



3. The empty actual page is saved to STEP and contains a hyperlink to the selected Flatplan.



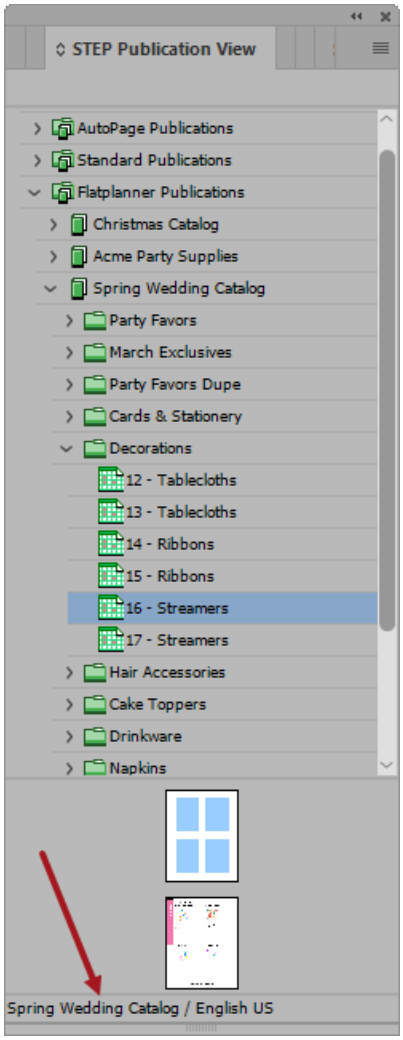
Opening Mounted Flatplanner Pages in InDesign

If changes need to be made to mounted pages after they are initially saved in STEP, they should be opened from within InDesign, *not* from your local computer.

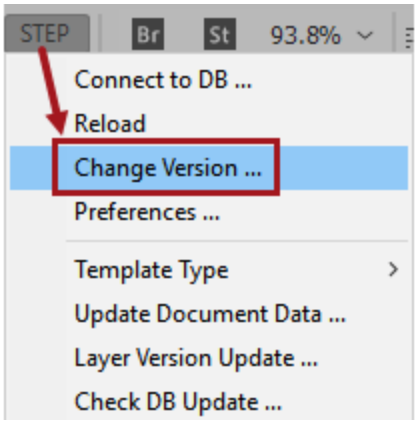
When a page in STEP is opened from within InDesign and edited, saving this page back to STEP from within InDesign will overwrite the page that was previously saved. If you make edits to a page from your local machine instead, then save that document back to STEP, a new document will be created in STEP and this document will not be linked to the original Flatplan.

To open mounted Flatplanner pages from the **STEP Publication View** panel, follow these steps:

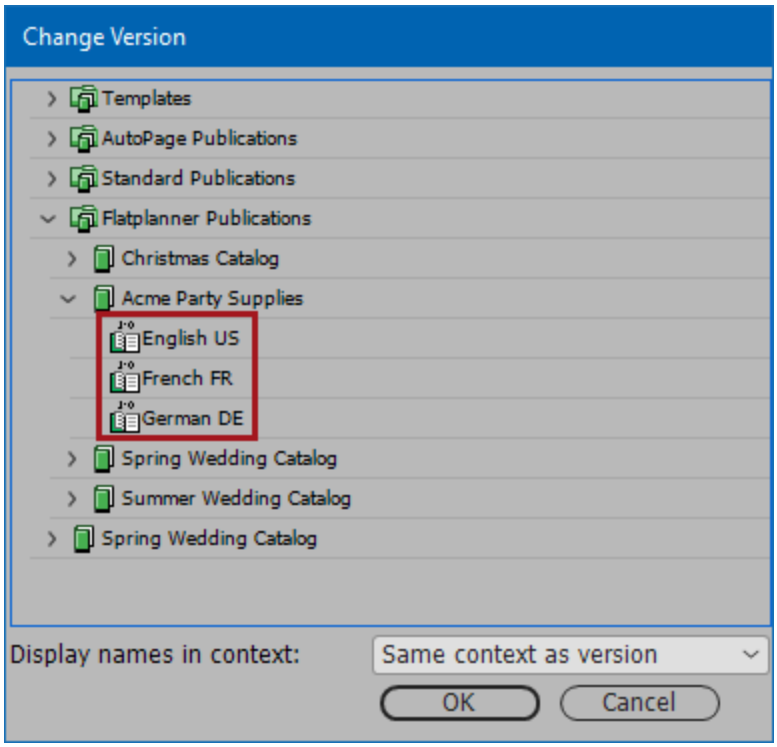
1. In InDesign, open the **STEP Publication View** by navigating to Window > STEP Publication View from the InDesign application bar across the top of the InDesign interface.
2. Next, make sure that you are working in the correct publication **version** in InDesign. Your publication version will be displayed at the bottom of the STEP Publication View panel; for example, Spring Wedding Catalog / English US.



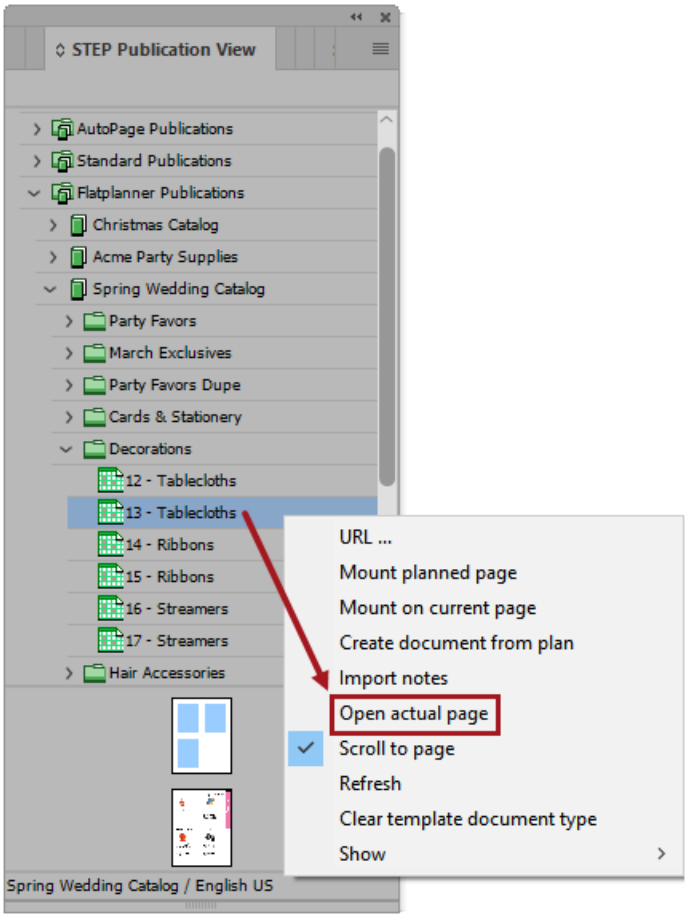
3. If the displayed version does not match the publication that you are working with, navigate to STEP > **Change Version** to change to the correct version.



4. In the **Change Version** dialog that displays, select the correct publication version, then click **OK**.



5. In the **STEP Publication View,** navigate to the Flatplan for the page that you would like to open. With the page object selected, right-click and select **Open actual page**.



6. The mounted page that was saved back to STEP will open. If the page was saved as part of a spread, both pages in the spread will open.
7. Make any changes to the page as needed, then save it back to STEP by following the same steps outlined in the first section of this topic.

Updating Documents in Flatplanner

When Flatplanner pages are finalized in InDesign and saved to STEP, the mounted content and layout reflects how the data and layout appeared in STEP at the moment the page was created. If changes are made later to the corresponding **content** in STEP (for example, attribute values or referenced images), or if the layout if altered by rearranging **frames** on the Flatplan or on the InDesign page, the actual pages become out of sync with the content and page layout in STEP.

When a content or plan layout mismatch occurs, options are available both within the STEP Workbench and within InDesign to automatically update page content without having to rebuild the pages anew.

This documentation section contains the following topics:

- Updating Documents After STEP Content Changes
- Updating Documents After Layout Changes

Updating Documents After STEP Content Changes

When Flatplanner planned pages are mounted in InDesign, the STEP content placed on the pages reflects how the data appeared in STEP at the moment the page was created. If changes are made later to the data in STEP—for example, updates to attribute values or referenced images—then the actual pages become out of sync with the latest content. When this occurs, pages can be easily updated from within the STEP Workbench or within InDesign by a number of different methods to bring the data back in sync. If desired, functionality can be used in both STEP and InDesign that can scan pages *before* they are updated to determine exactly where the outdated content appears, simplifying the page update process by making mismatched data easy to locate.

Checking Actual Pages for Updates Needed

Before updating actual pages, it is recommended to first check the pages to see where updates are needed. STEP utilizes the connected InDesign server to 'scan' through the pages and determine exactly where the out-of-date content appears. After running an update check, indicators will display on the affected pages on the **Plan** tab and in the **Publication Planner** to let you know which pages need to be updated.

Note: InDesign pages must first be saved to STEP before they can be scanned for updates needed.

Though a pre-check is not required to update pages, this 'pinpointing' approach helps to prevent scenarios where a large amount of system resources are tied up for large update operations (for example, on entire publications), when only one section or even one document may actually need updating.

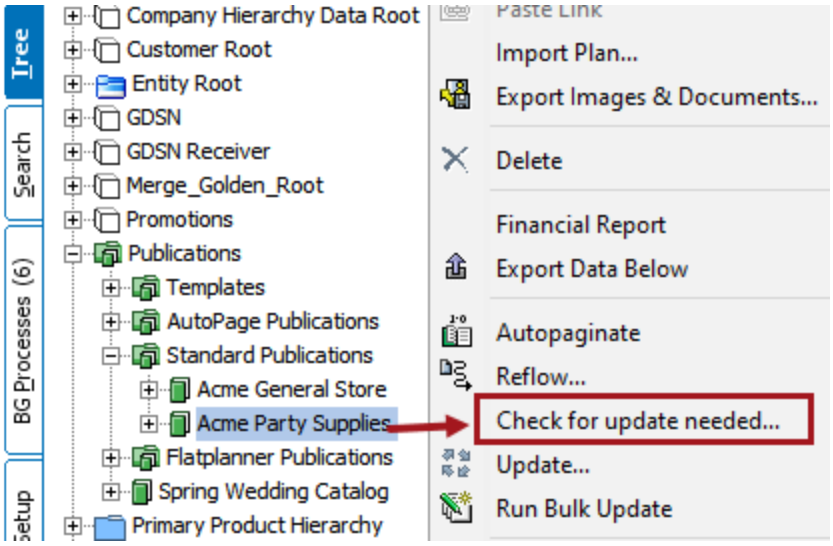
Documents can be checked for needed updates from the **Tree**, the **Publication Planner**, and by using a **Bulk Update** operation.

Important: Only *content* updates are recognized by the system when checking for needed updates. Changes to the Flatplan layout or pagination rules are not shown as 'updates needed' on Flatplans or in the Publication Planner.

Check for Updates From the Tree

Pages within entire publications, sections, or subsections can be checked for updates from the Tree.

1. In the Tree, navigate to the relevant publication or section, then right-click and select **Check for update needed...**.

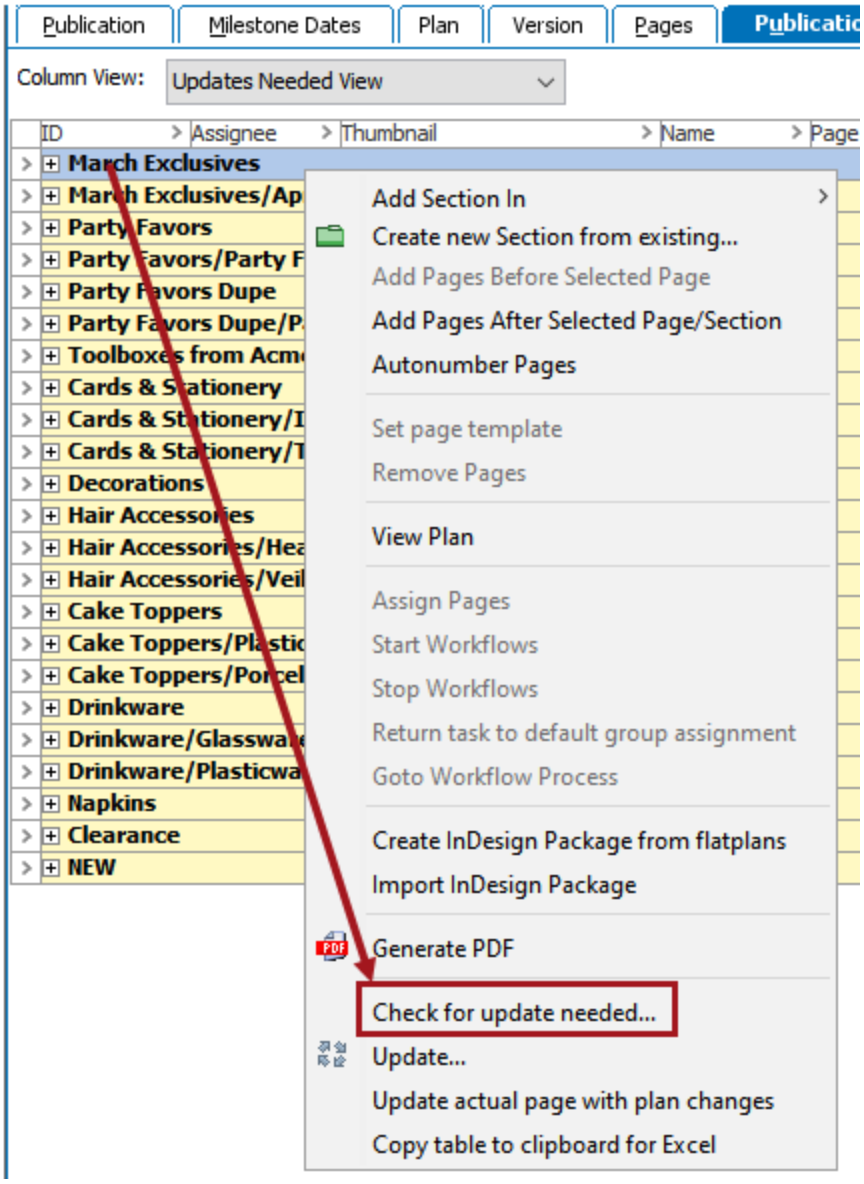


2. The **Check for Update Needed** dialog displays. Click **OK**.
3. An 'Autopage Batch Service' background process is kicked off that checks for changes in all the mounted objects on pages in the selected publication or section.
4. Click 'Go to process' to monitor the progress of the background process on the BG Processes tab.
5. When the process is complete, navigate to the **Plan** tab or the **Publication Planner** to view the pages that need updates. Indicators will display alongside the pages that need to be updated. For more information on these indicators, see the ' Updates Needed Indicators' subsection of this topic below.

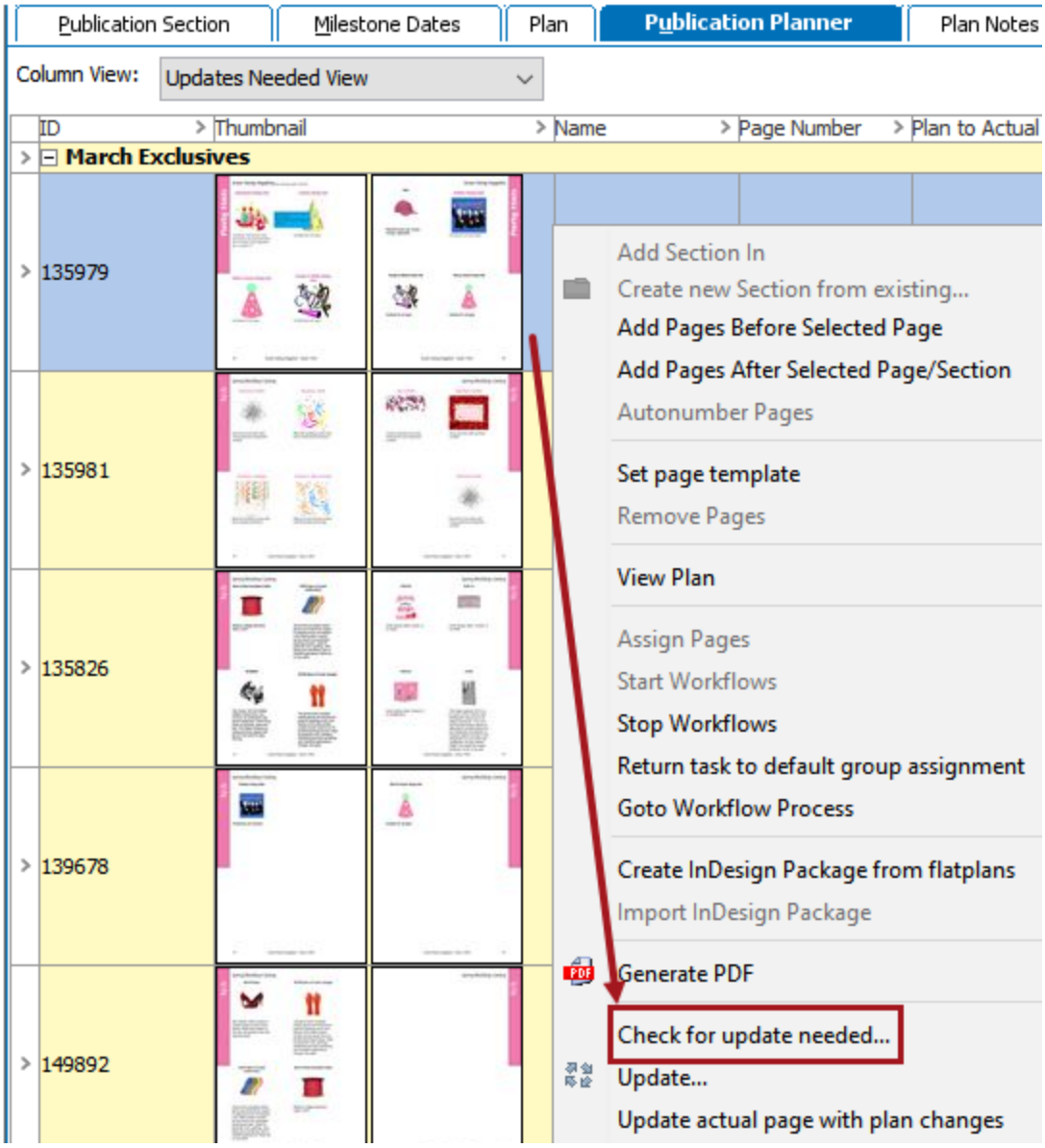
Check for Updates From the Publication Planner

From the Publication Planner, pages can be checked for updates at the section or subsection level, or at the individual page level.

1. To check for updates on all pages in a **section** or **subsection**, click the section in the Publication Planner, then right-click and select **Check for update needed...**. The process continues identically to that of running a 'Check for update needed' process from the Tree.



2. To check for updates on an individual **page**, expand the relevant section, then locate the page that you would like to check for updates.
3. Right-click anywhere in the row containing the page, then select **Check for update needed...**. The remainder of the process is identical to what is detailed above for sections and subsections.



Check for Updates Using Bulk Update

Bulk update is another method of accessing the same features available under 'Update.' For information on bulk update operations for STEP publication documents, see **Publishing: Check Publication Document for Needs Update Operation** in the **Bulk Updates** documentation.

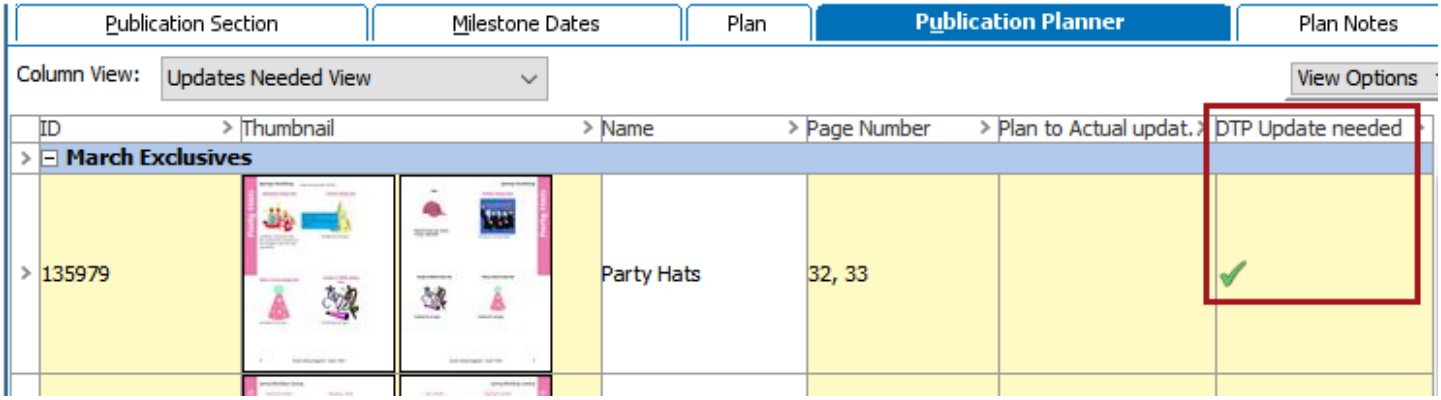
Updates Needed Indicators

After running a check for updates needed, indicators will display on planned pages on the **Plan** tab, within the **Publication Planner**, and within **InDesign** to let you know where updates are needed. In InDesign, the indicator displays at the **frame** level.

Publication Planner Indicator

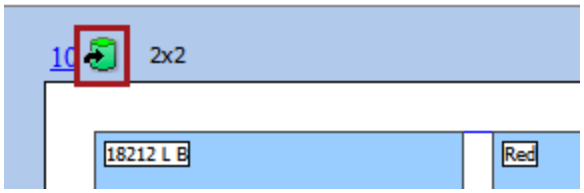
In the **Publication Planner**, a green check mark displays in the 'DTP update needed' column.

Note: To enable this feature, the 'DTP Update needed' column must first be added to the Publication Planner view. See the **Publication Planner View Elements** topic for more information.



Plan Tab Indicator

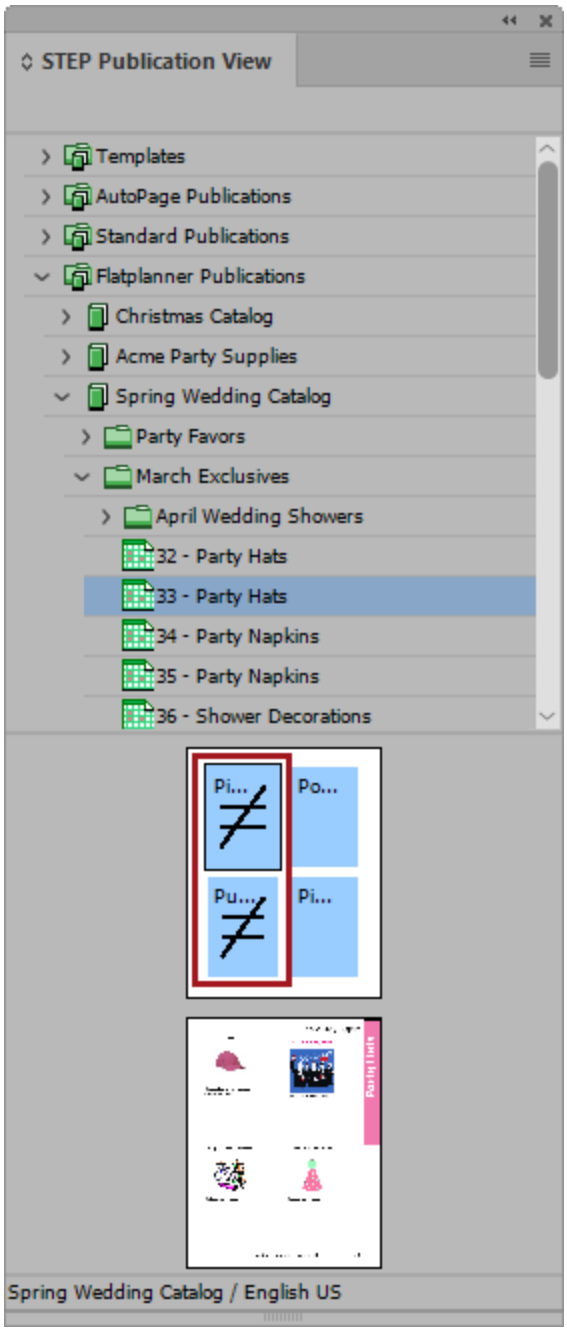
On the **Plan**, a green 'canister' icon displays in the outward upper corner of the planned page when the corresponding actual page needs to be updated.



InDesign Indicator

In **InDesign**, if the content of a page cell needs to be updated, a 'not equal' symbol ≠ displays in the affected Flatplan frame(s) in the Preview area of the STEP Publication View panel.

Note: The actual page must be open before the 'not equal' symbol(s) will display in the plan preview.



Updating Actual Pages from the Workbench

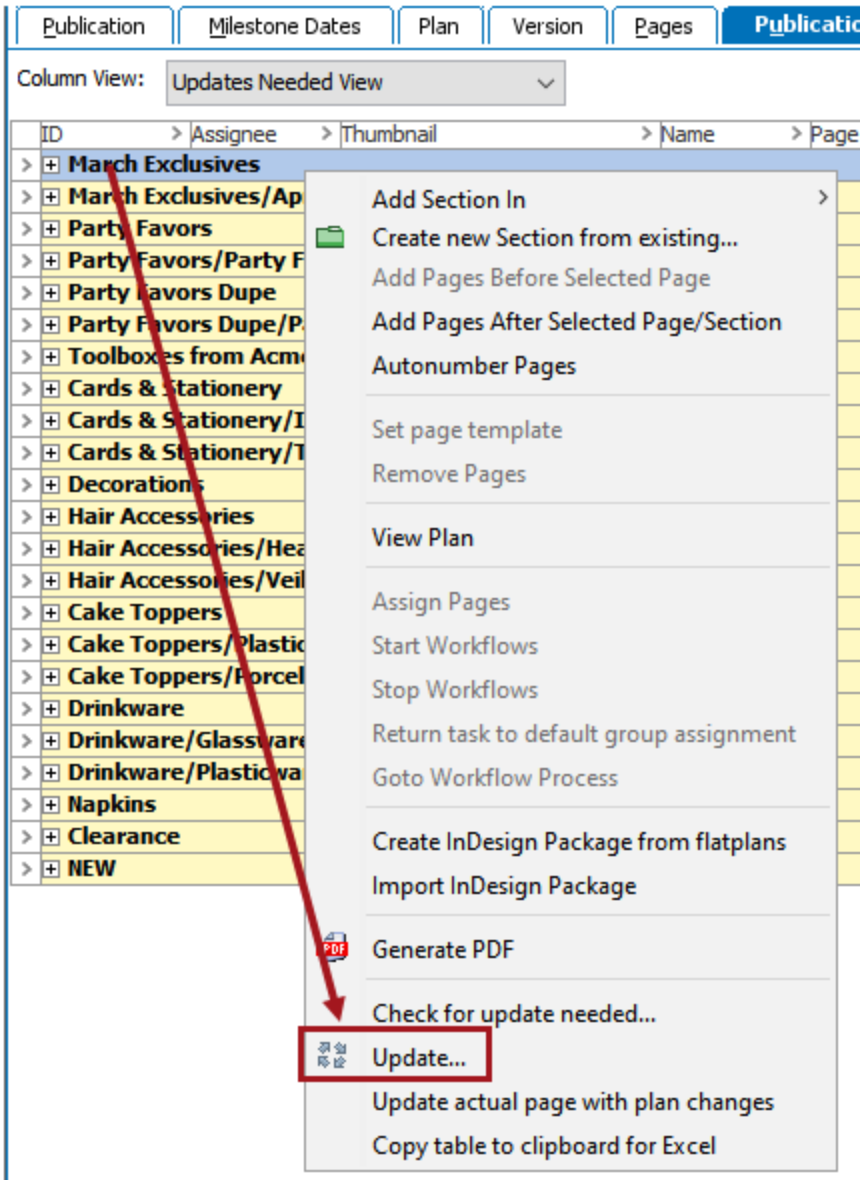
Several update methods are available in the STEP Workbench for updating saved InDesign pages. Some are specific to the Flatplanner component and some are available for publications built with any STEP Publisher component. The methods discussed in this section are specific to Flatplanner.

For information on the methods available to all types of publications, including how to update documents from the **Tree**, see the **Updating Documents From the Workbench** topic in the **STEP Publisher** documentation.

Updating Pages from the Publication Planner

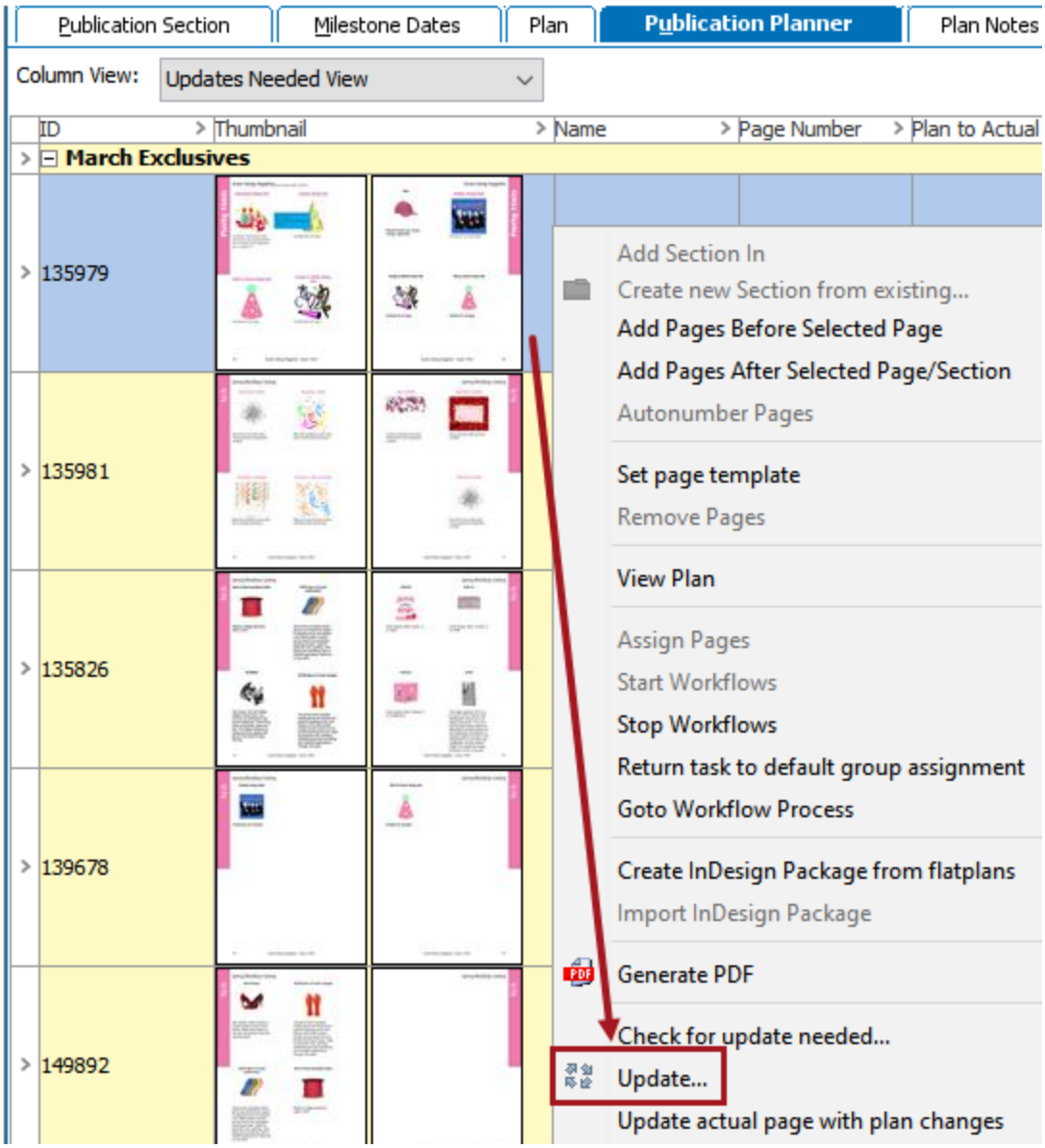
From the Publication Planner, pages can be updated at the section or subsection level, or at the individual page level.

1. To update all pages in a **section** or **subsection**, click the section in the Publication Planner, then right-click and select **Update...**.
2. To complete the update process, follow the instructions detailed in the **Updating Documents From the Workbench** topic in the **STEP Publisher** documentation.



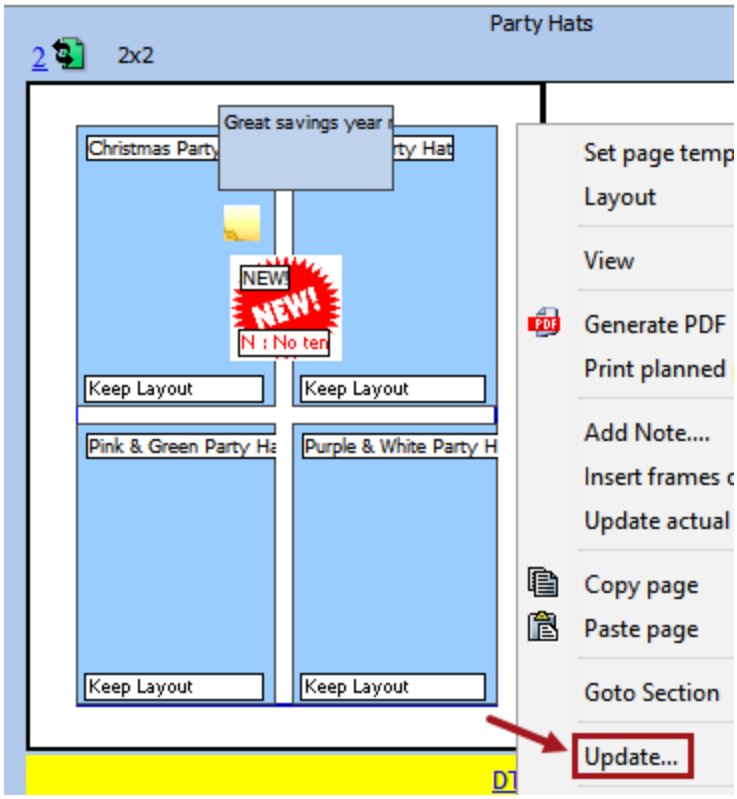
3. To update an individual **page**, expand the relevant section, then locate the page that you would like to update.

4. Right-click anywhere in the row containing the page, then select **Update...**. The remainder of the process is identical to what is detailed above for sections and subsections.



Updating Pages from the Plan Tab

Individual pages can be updated from the Plan tab by right-clicking in the white area of the page, then selecting **Update...**. This feature is available in all View modes on the Plan tab (Plan, Preview, Sticker Book, and Mounted Pages).



Updating Pages Using Bulk Update

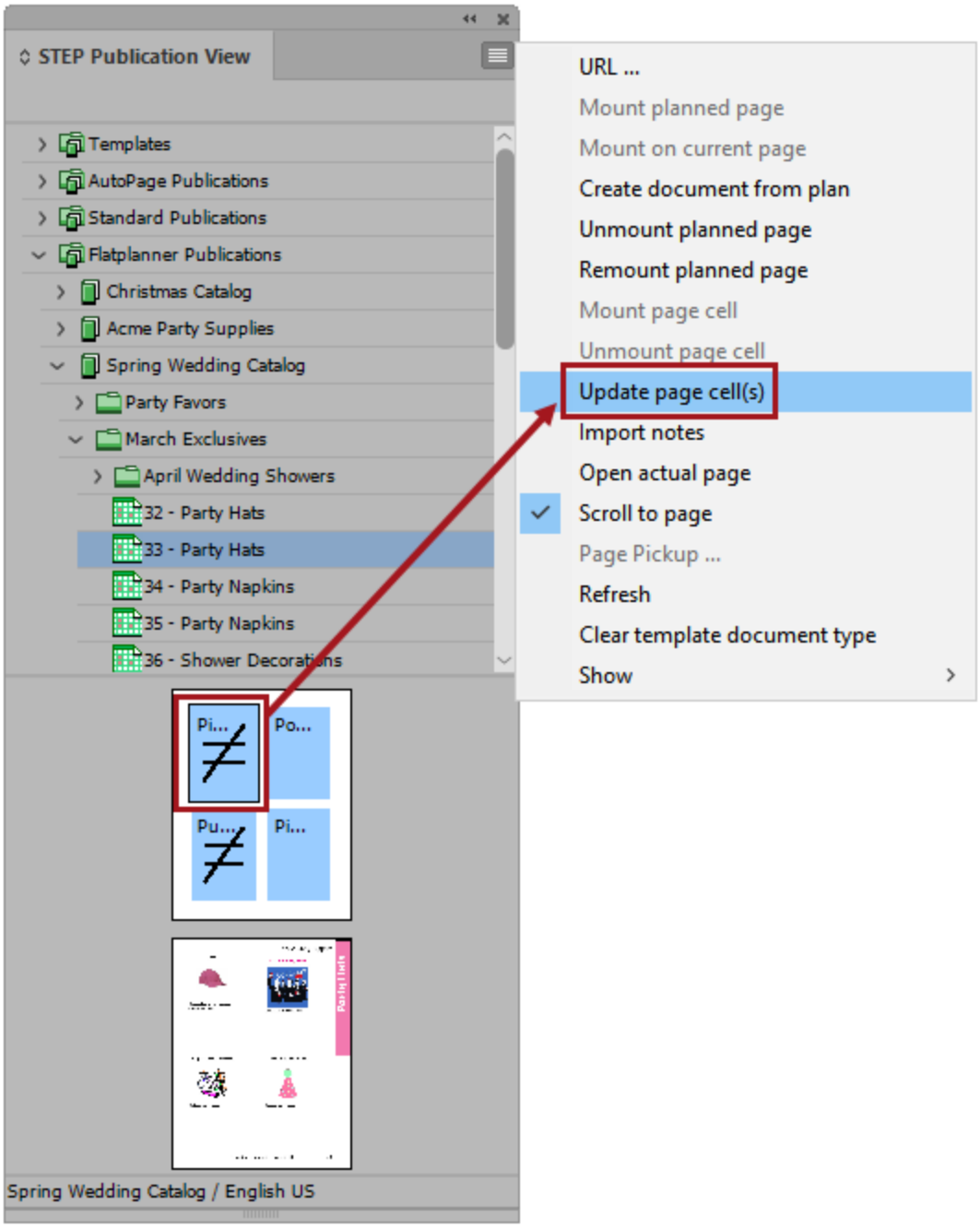
Bulk update is another method of accessing the same features available under 'Update.' For information on bulk update operations for STEP publication documents, see **Publishing: Check Publication Document for Needs Update Operation** in the **Bulk Updates** documentation.

Updating Actual Pages from InDesign

Multiple update methods are available in InDesign for updating mounted InDesign pages. These methods work with publications created with any STEP Publisher component, including Flatplanner. For information on the methods available to all types of publications, see the **Updating Documents From InDesign** topic in the **STEP Publisher** documentation.

The method specific to Flatplanner operates on a planned page **cell** level and updates one cell at a time. The following steps explain how to use this method.

1. Open the **STEP Publication View** panel and locate the planned page that you want to update.
2. Right-click on the plan and select **Open actual page**. The actual page must be open before the 'not equal' symbols will display.
3. In the preview area at the bottom of the panel, select the page cell that you want to update.
4. Expand the **Options** menu in the upper right corner of the panel, then click **Update page cell(s)**.
5. The page cell is updated.


STEP Publication View
Templates
AutoPage Publications
Standard Publications
Flatplanner Publications
Christmas Catalog
Acme Party Supplies
Spring Wedding Catalog
Party Favors
March Exclusives
April Wedding Showers
32 - Party Hats
33 - Party Hats
34 - Party Napkins
35 - Party Napkins
36 - Shower Decorations
Spring Wedding Catalog / English US
URL ...
Mount planned page
Mount on current page
Create document from plan
Unmount planned page
Remount planned page
Mount page cell
Unmount page cell
Update page cell(s)
Import notes
Open actual page
Scroll to page
Page Pickup ...
Refresh
Clear template document type
Show

Updating Documents After Layout Changes

After an actual page has been saved back to STEP, changes can still be made to the Flatplan. When this occurs, the actual pages become out of sync with the layout of the planned page. As a result, the actual pages need to be updated to match the updated plans.

Changes made to Flatplans that trigger the system to recognize a plan change include:

- linking a different product to a frame
- changing the frame layout
- adding a new frame

Note: Changes to the product templates linked to frames are not recognized as plan changes, nor are frame deletions.

This topic explains the available methods for updating actual pages after a Flatplanner layout has been changed, which are different than the methods used to update pages after *content* has been changed. Additionally, this topic explains the indicators that display when the layout of a planned page no longer matches the layout of an actual page and how to 'reverse' update a Flatplan from an actual page.

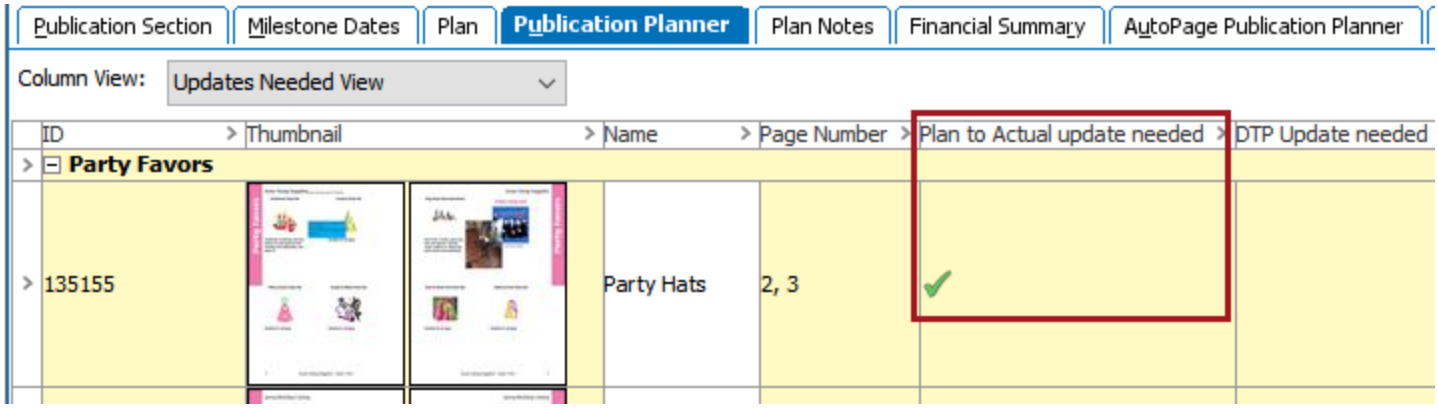
Updates Needed Indicators

When a Flatplan is changed in STEP, there is no need to first check the pages for updates needed. Changes to a Flatplan are recognized as soon as the edited plan is saved. Pages that need to be updated due to Flatplan layout changes are indicated by an icon on the planned page on the **Plan** tab or a checkmark by the page in the **Publication Planner**.

Publication Planner Indicator

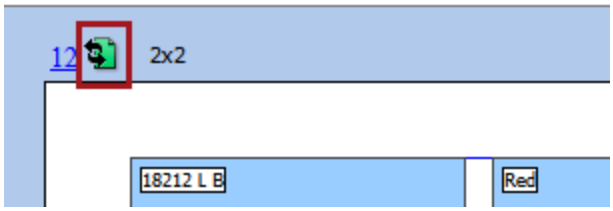
In the **Publication Planner**, a green check mark displays in the 'Plan to Actual update needed' column when a Flatplan is out of sync with the actual page.

Note: To enable this feature, the 'Plan to Actual update needed' column must first be added to the Publication Planner view. See the **Publication Planner View Elements** topic for more information.



Plan Tab Indicator

On the **Plan**, a green page icon with black arrows displays in the upper corner of the page when a Flatplan has been edited and no longer matches the layout of the actual page.



Update Actual Page With Plan Changes

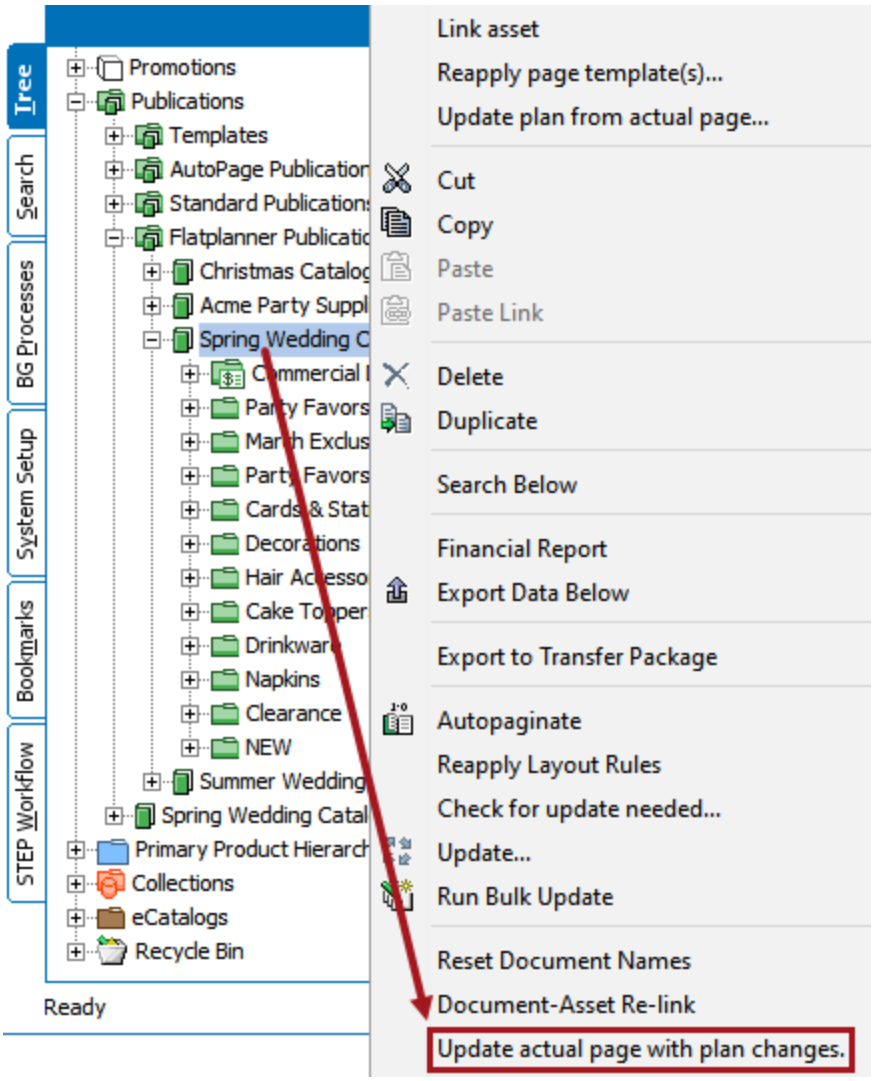
To get an actual page back in sync with an altered Flatplan, an **Update actual page with plan changes** operation must be run on the pages. This operation can be run from the **Tree**, the **Publication Planner**, and the planned pages on the **Plan** tab.

Note: Update actual page with plan changes' does not make changes to any out-of-sync *content* on the pages. To update STEP content, follow the methods outlined in the **Updating Documents after STEP Content Changes** topic.

Updating Pages with Plan Changes from the Tree

Pages can be updated with layout changes from the Tree, allowing for bulk changes to pages within entire publications, sections, or subsections.

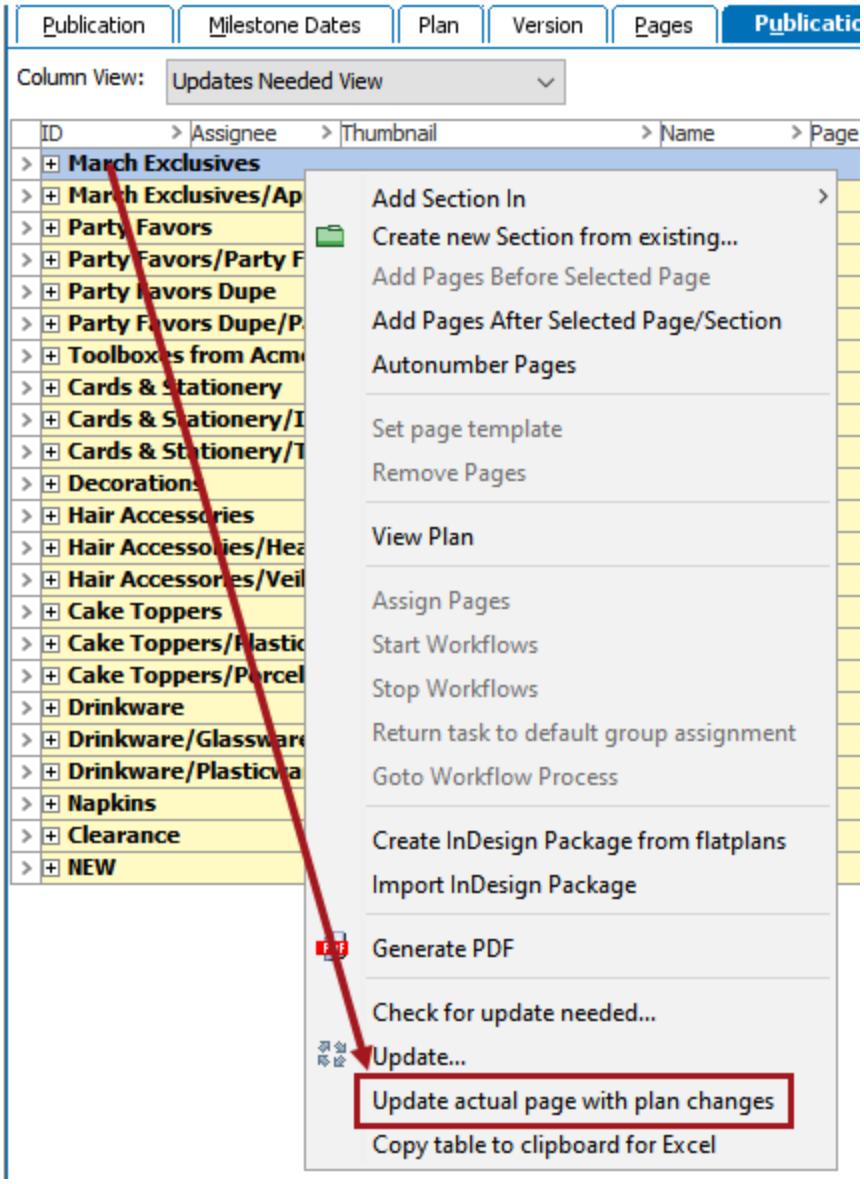
1. To update all pages in a, publication, section, or subsection, right-click on the relevant publication object and select **Update actual page with plan changes.**.



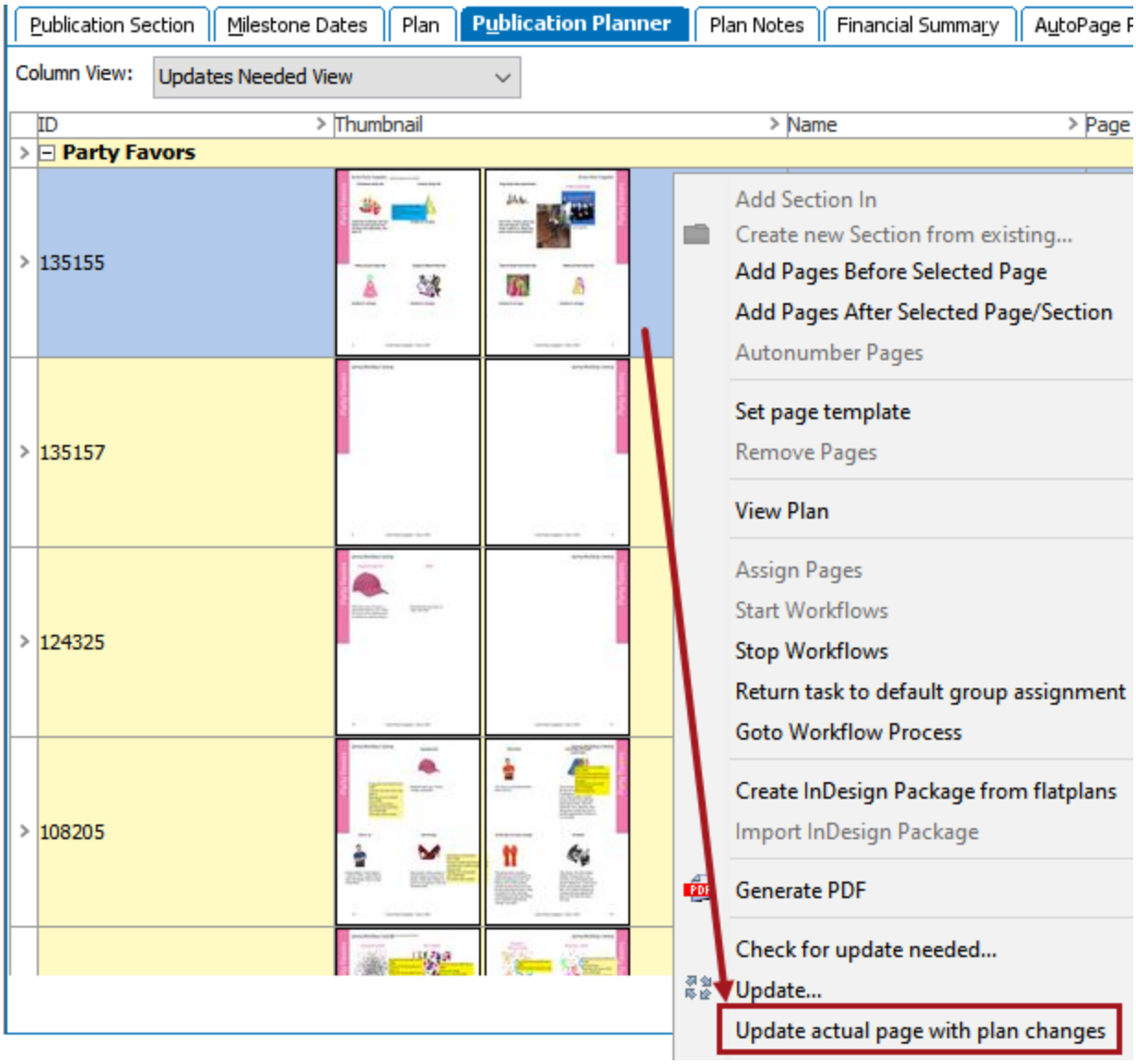
2. A background process kicks off that sends the pages to the InDesign server for page remounts.
3. The pages are remounted to reflect the plan changes.

Updating Pages with Plan Changes from the Publication Planner

1. To update all pages in a **section** or **subsection** with plan changes, click the section in the Publication Planner, then right-click and select **Update actual page with plan changes**. The process continues identically to that of running the page update from the Tree.

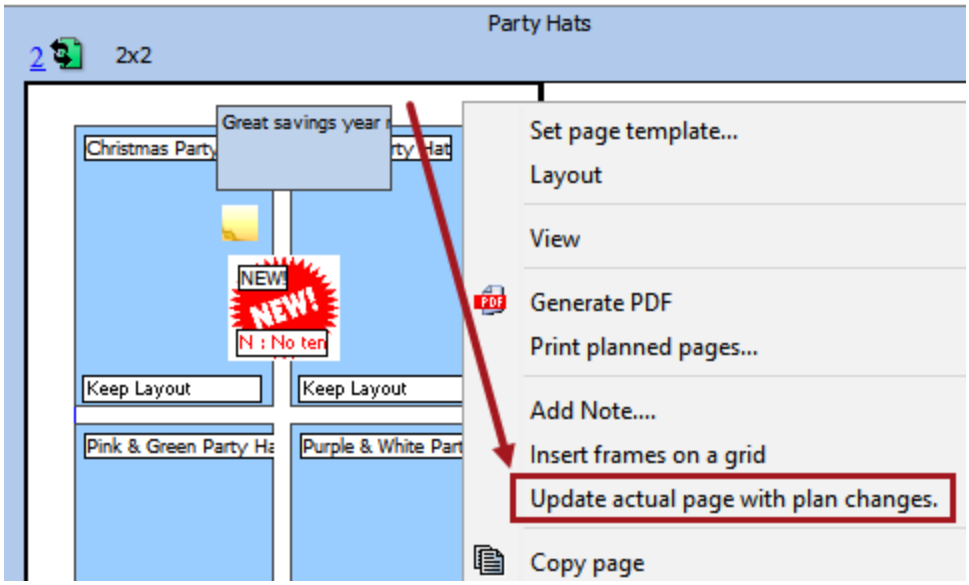


2. To update an individual **page**, expand the relevant section, then locate the page that you would like to update.
3. Right-click anywhere in the row containing the page, then select **Update actual page with plan changes**. The remainder of the process is identical to what is detailed above for sections and subsections.



Updating Pages with Plan changes from the Plan

Individual pages can be updated from the Plan tab by right-clicking in the white area of the page, then selecting **Update actual page with plan changes**. This feature is available in all View modes on the Plan tab (Plan, Preview, Sticker Book, and Mounted Pages).

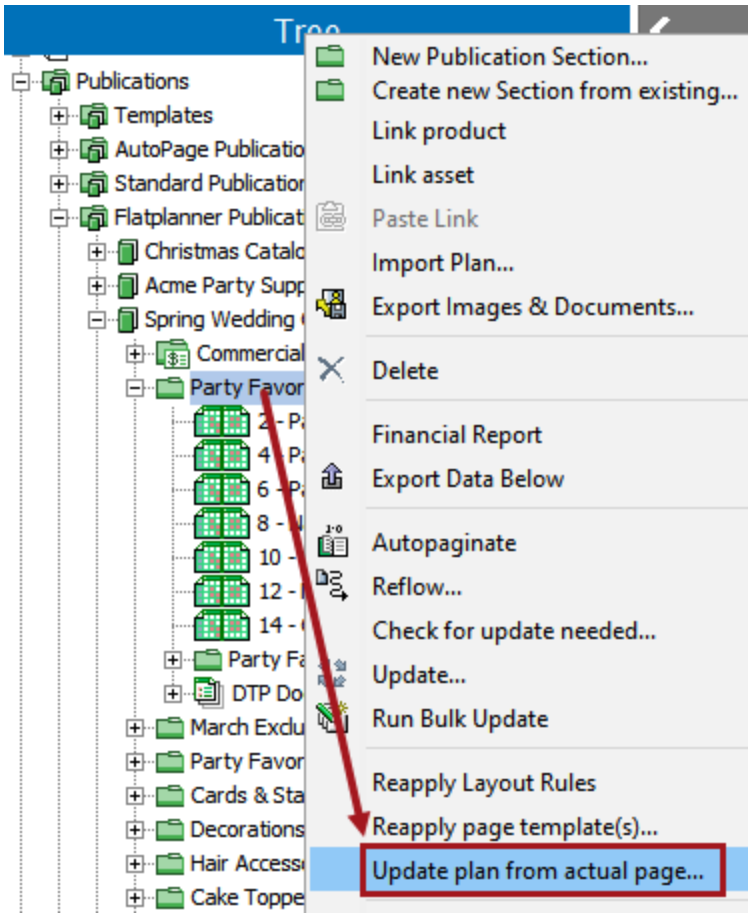


Updating Plans from Actual Pages

The **Update Plan from Actual Page** feature is a reverse update that will change the frames on Flatplanner planned pages to reflect the updated layout from the actual page. For example, if frames are rearranged on the actual page, or a new product is manually mounted, the planned page frames will be rearranged accordingly after the update is run.

Important: This operation can only be performed from the **Tree** and cannot be undone.

1. To update plans from actual pages, right-click on the relevant publication, section, or subsection, then select **Update plan from actual page**.



2. The Plan is updated to reflect the layout of the actual page.

Resetting Actual Page Names in Flatplanner Publications

Functionality exists in Flatplanner that allows the names of finalized InDesign pages that have been saved back to STEP to be 'reset.' This option, called **Reset Document Names**, changes the names of the actual pages / DTP Documents to once again match the name of the corresponding planned pages.

By default, when InDesign pages are saved back to STEP, they are given the name of the corresponding planned page, prefixed with the page number and a hyphen. For example, for a planned page spread named 'Party Hats' that is page 32, the InDesign file name will be '32 - Party Hats.' In addition to this default naming, users may make other changes to the file names, such as appending information to the end.

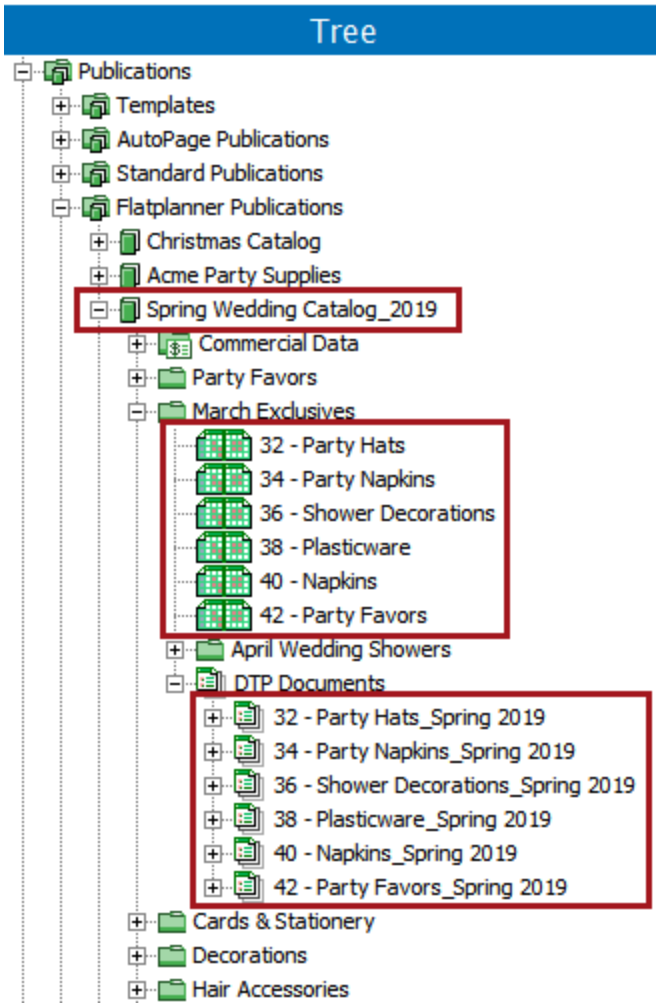
One use case for resetting actual page names is if a publication has been duplicated and the InDesign pages from the original publication are included with the new publication. Since duplicated pages retain their original names, they may not be accurate for the new publication. In this instance, it may be useful to have the system to reset the InDesign page names. This not only reduces the possibility of confusing the new InDesign documents with the original ones, but can save time on manual file renaming.

Note: This feature can be used on any publication; it does not have to be a duplicated publication.

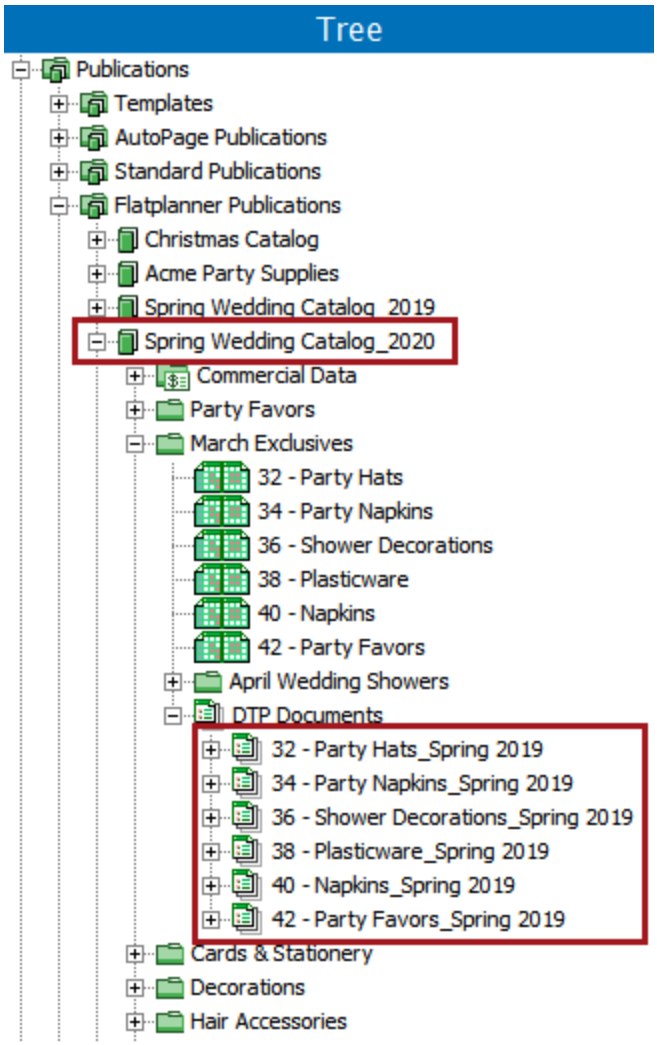
This topic only describes the 'Reset Document Names' feature and does not explain how to duplicate a publication. For detailed information on duplicating publications, see the **Duplicating a Publication** topic in the **Publication Hierarchy** documentation.

Resetting Document Names

In this example, the system has added the default page number prefix to the InDesign page names, and the user has appended the text '_Spring 2019' to the end.



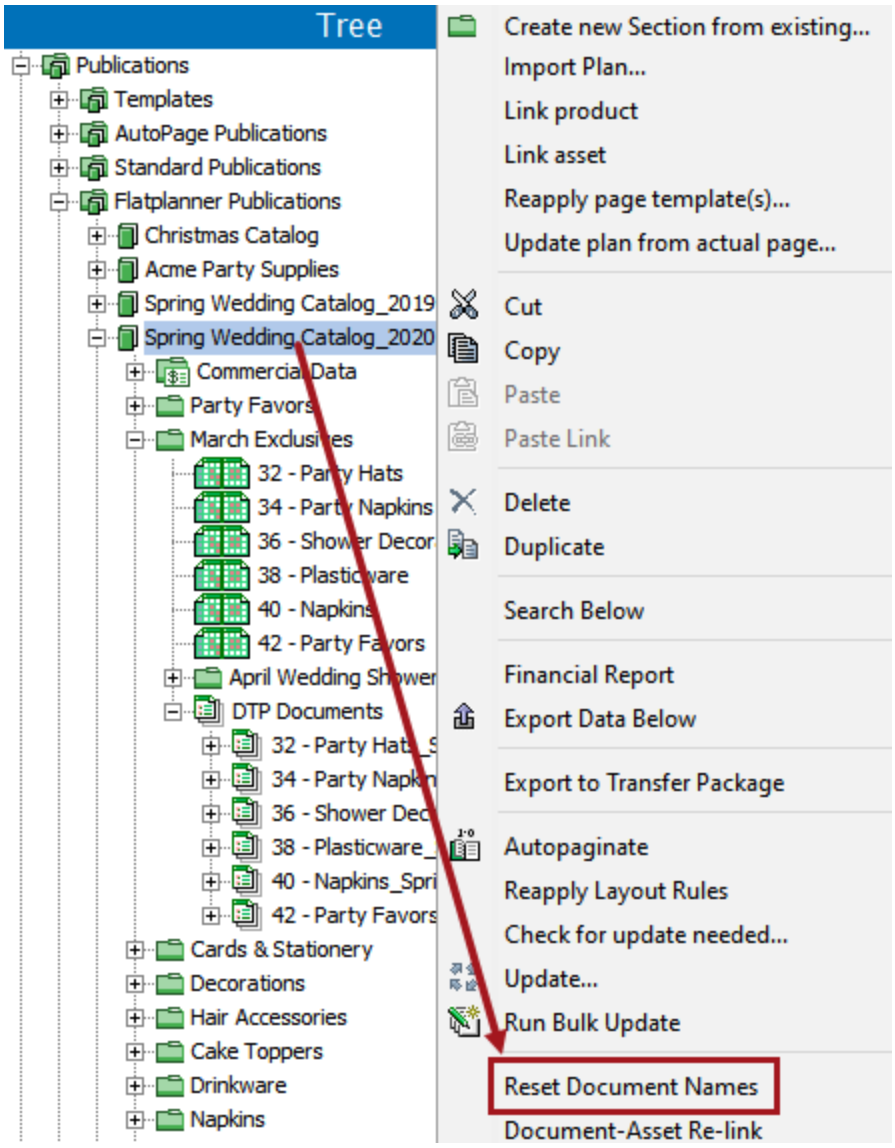
After duplicating the 2019 catalog to create the 2020 catalog, the original 'Spring 2019' page names remain.



To reset the names of the InDesign pages:

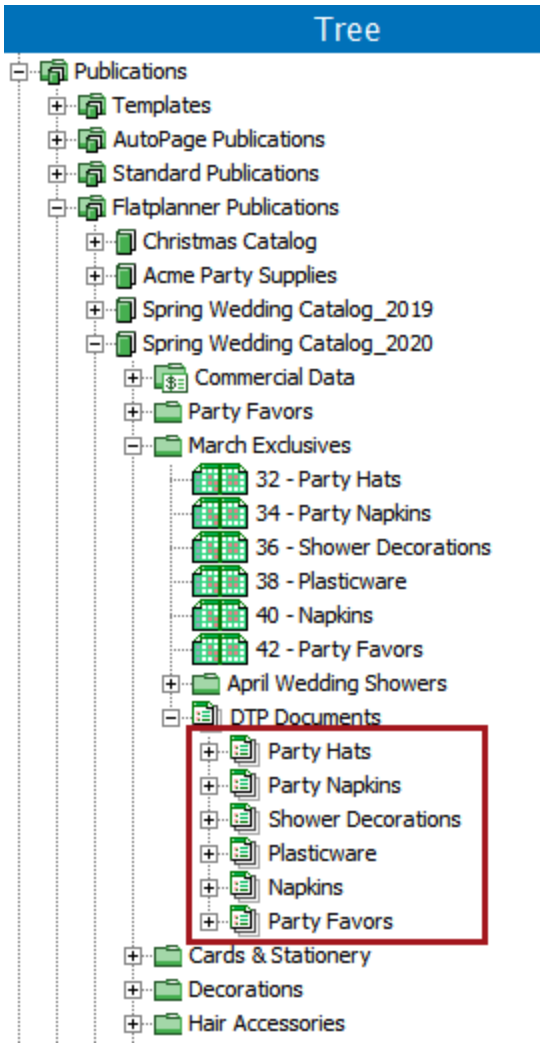
1. In the **Tree**, right-click on the relevant publication or section, then select **Reset Document Names**.

> **Note:** When applied to a publication section, all of the DTP documents directly under the section, but not in subsections, will get their names reset. When applied to a publication, all documents in all sections, including subsections, will get their names reset.



2. The InDesign page names are automatically renamed to match the names of the corresponding planned pages. No background process is launched.

> **Note:** If a planned page does not have a name, the DTP Document will have its name set to the page number of the corresponding planned page.


Tree
Publications
Templates
AutoPage Publications
Standard Publications
Flatplanner Publications
Christmas Catalog
Acme Party Supplies
Spring Wedding Catalog_2019
Spring Wedding Catalog_2020
Commercial Data
Party Favors
March Exclusives
32 - Party Hats
34 - Party Napkins
36 - Shower Decorations
38 - Plasticware
40 - Napkins
42 - Party Favors
April Wedding Showers
DTP Documents
Party Hats
Party Napkins
Shower Decorations
Plasticware
Napkins
Party Favors
Cards & Stationery
Decorations
Hair Accessories

Using the 'getInheritedPublicationValue' Function in Flatplanner

The STEP function 'getInheritedPublicationValue' is used to pick up metadata (description) attribute values from section, publication, and publication group objects. Use cases for this function include the display of publication-related metadata on mounted pages, in Flatplanner Sticker Book views, and on Flatplanner planned pages.

Note: Though there is a similar STEP function named 'getInheritedPublicationHierarchyValue', that function is primarily used to pull metadata onto *product* objects, which are not relevant to this topic. For more information, see the **Publishing Examples** section of the **Calculated Attributes** documentation.

When valid for Flatplanner planned pages, calculated attributes using the 'getInheritedPublicationValue' function can be used to mount publication metadata onto InDesign pages by way of InDesign tagging applied to the publication template. This functionality allows users more dynamic control over content that exists as 'furniture' (publication template elements) on page spreads. For example, a section-level description attribute that identifies the 'theme' of the Section could be displayed on side tabs or headers of mounted pages, reducing manual work on publication templates and mounted pages.

This topic describes how to use the 'getInheritedPublicationValue' function to pull metadata values from a section, a publication, and a publication group onto an InDesign page mounted from a Flatplanner planned page.

Prerequisites

This topic assumes the following:

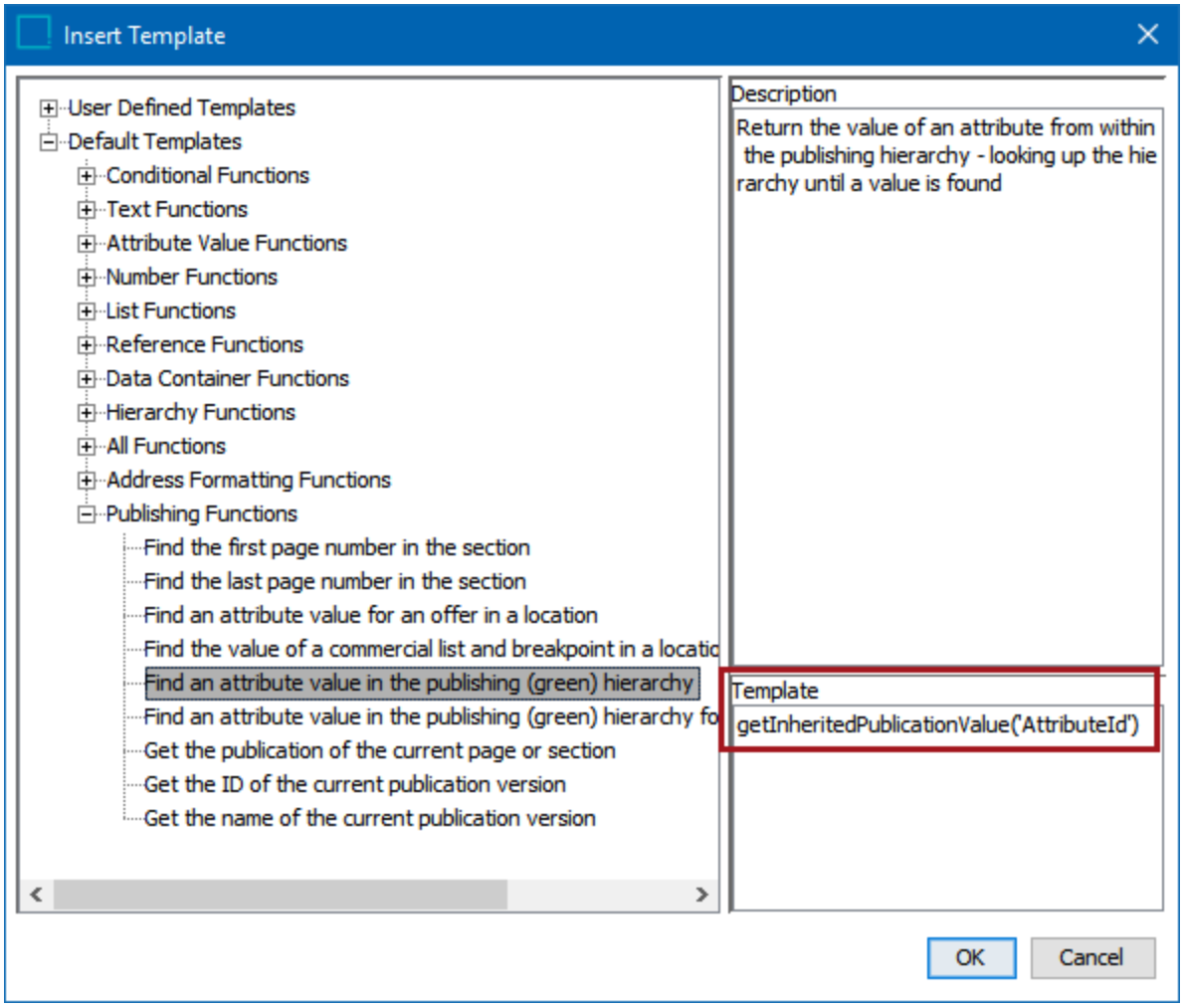
- An understanding of how to configure publication templates and product templates. For more information, see the **Publication Templates** and **Product Templates** topics in the **STEP Publisher** documentation.
- General knowledge of **STEP Functions**, which are detailed in the **Resource Materials** online help.
- An understanding of how to create attributes. See the **Creating Attributes** topic in the 'Attributes' section of the **System Setup** / **Super User Guide** documentation for more information.
- An understanding of how to create calculated attributes. See **Creating a Calculated Attribute** in the 'Attributes' section of the **System Setup** / **Super User Guide** documentation for more information.

Configuring the Calculated Attribute(s)

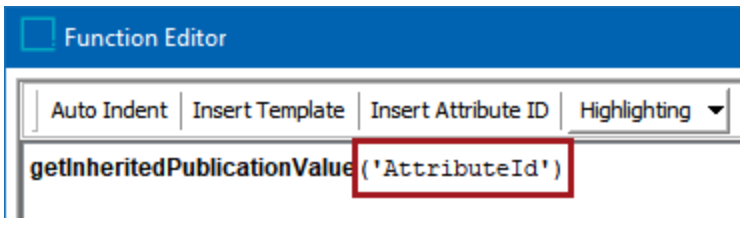
Follow these steps to create a calculated description attribute using the 'getInheritedPublicationValue' function:

1. Create the description attribute following the steps outlined in the **Creating Attributes** and **Creating a Calculated Attribute** topics in the 'Attributes' section of the **System Setup** / **Super User Guide** documentation.
2. After creating the attribute, right-click in the 'Value template' field on the 'Attribute' tab and select **Edit Function**. The **Function Editor** will open.

3. Click **Insert Template**, then expand the **Publishing Functions** section of the Default Templates.
4. Select 'Find an attribute value in the publishing (green) hierarchy' and click OK. The **Insert Template** window will close.



5. In the **Function Editor**, replace 'AttributeId' with the ID of the metadata attribute that you would like to pull onto the page.



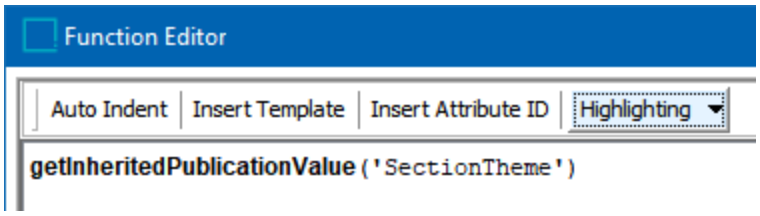
Note: Calculated attributes related to publishing functions cannot be tested in the Function Editor, as publication hierarchy [green] objects are not among the available options when selecting an object as the Evaluation Node.

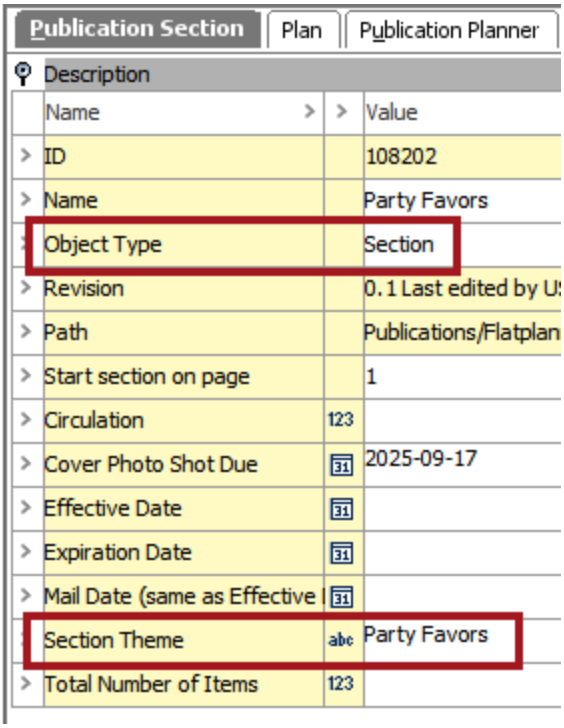
Sample Publication Metadata Attributes Configuration

1. **ObtainAttrValueFromSection**, which picks up values from **section** objects
2. **ObtainAttrValueFromPublication**, which picks up values from **publication** objects
3. **ObtainAttrValueFromPublicationGroup**, which picks up values from **publication group** objects

Section

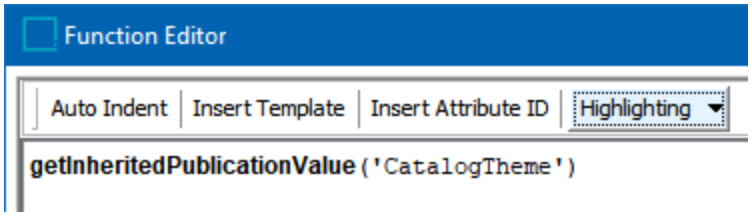
ObtainAttrValueFromSection [using the formula **getInheritedPublicationValue**('SectionTheme')] will pick up the value of the description attribute Section Theme (SectionTheme), which is 'Party Favors' in this example.

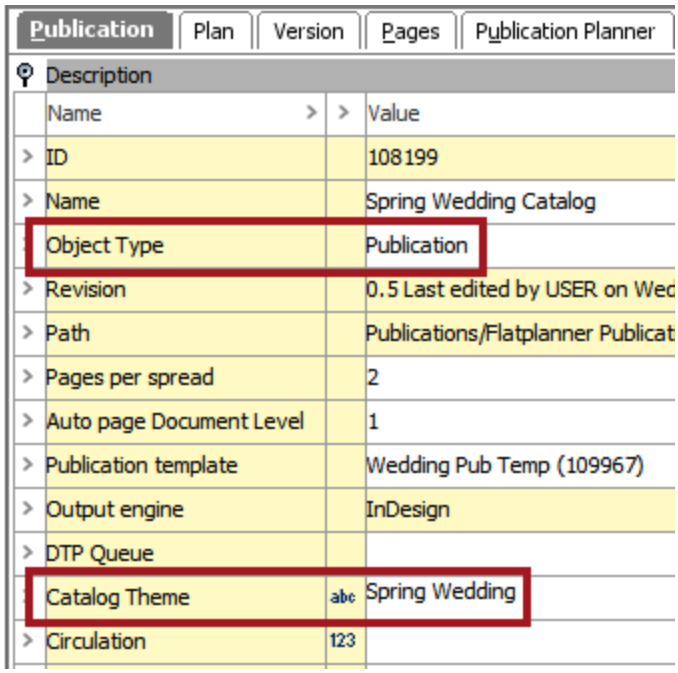




Publication

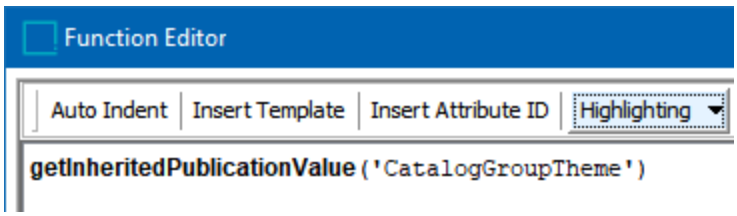
GetInheritedPublicationValue [using the formula **getInheritedPublicationValue**('CatalogTheme')] will pick up the value of the description attribute Catalog Theme (CatalogTheme), which is 'Spring Wedding' in this example.

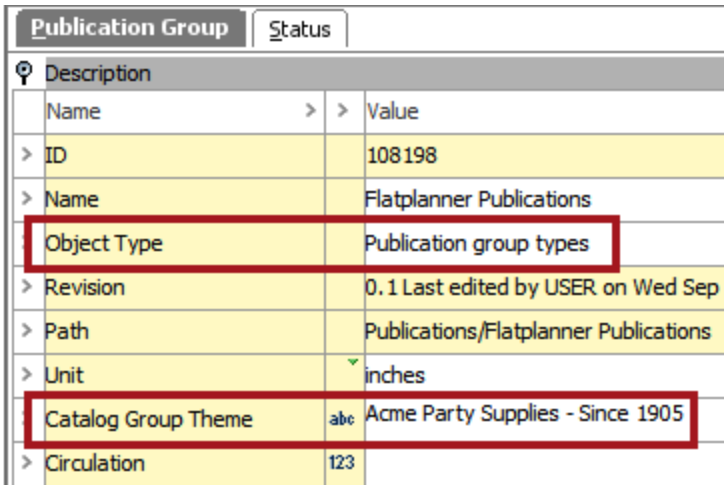




Publication Group

ObtainAttrValueFromPublicationGroup [using the formula **getInheritedPublicationValue** ('CatalogGroupTheme')] will pick up the value of the description attribute Catalog Group Theme (CatalogGroupTheme), which is 'Acme Party Supplies - Since 1905' in this example.

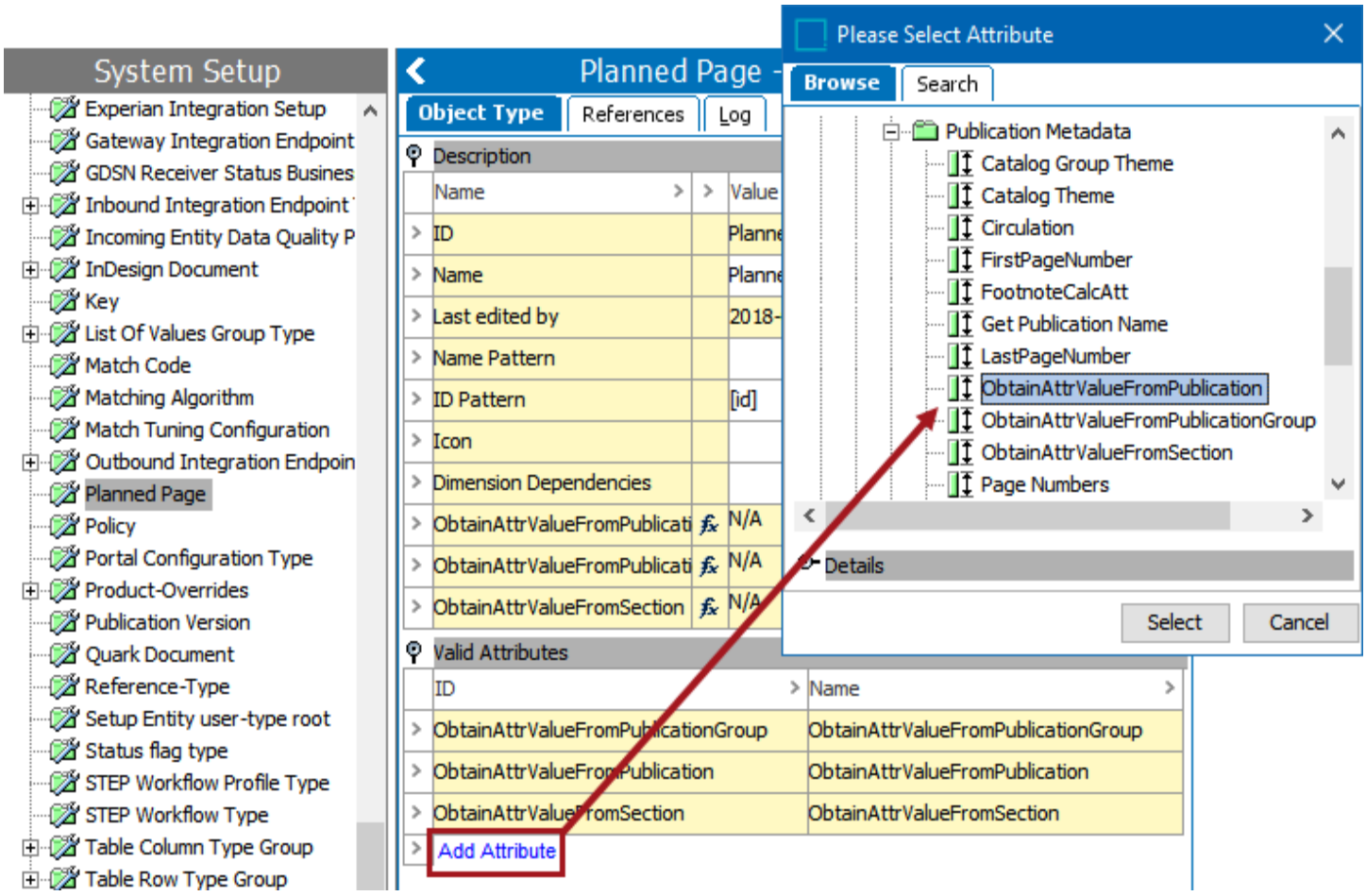




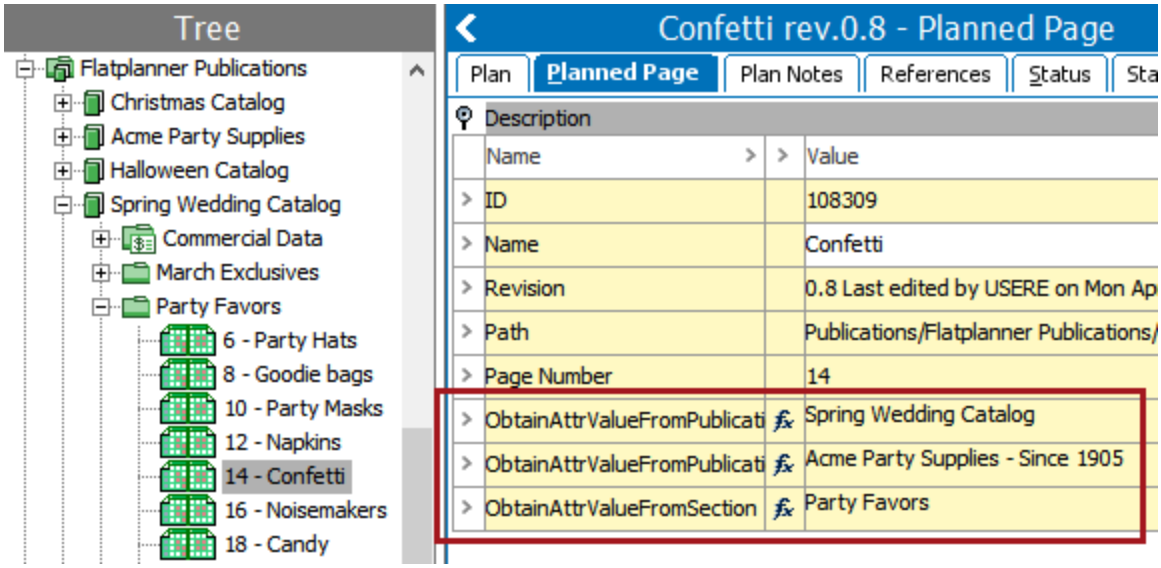
Making the Attributes Valid for Planned Pages

Make the calculated attributes valid on **Planned Page** objects by following these steps:

1. Under **System Setup**, navigate to Object Types & Structures > Basic Object Types > **Planned Page**.
2. On the Object Type tab, expand the Valid Attributes flipper and click 'Add Attribute' to open the **Please Select Attribute** dialog.
3. Select the attribute(s) that you will place on your publication template.



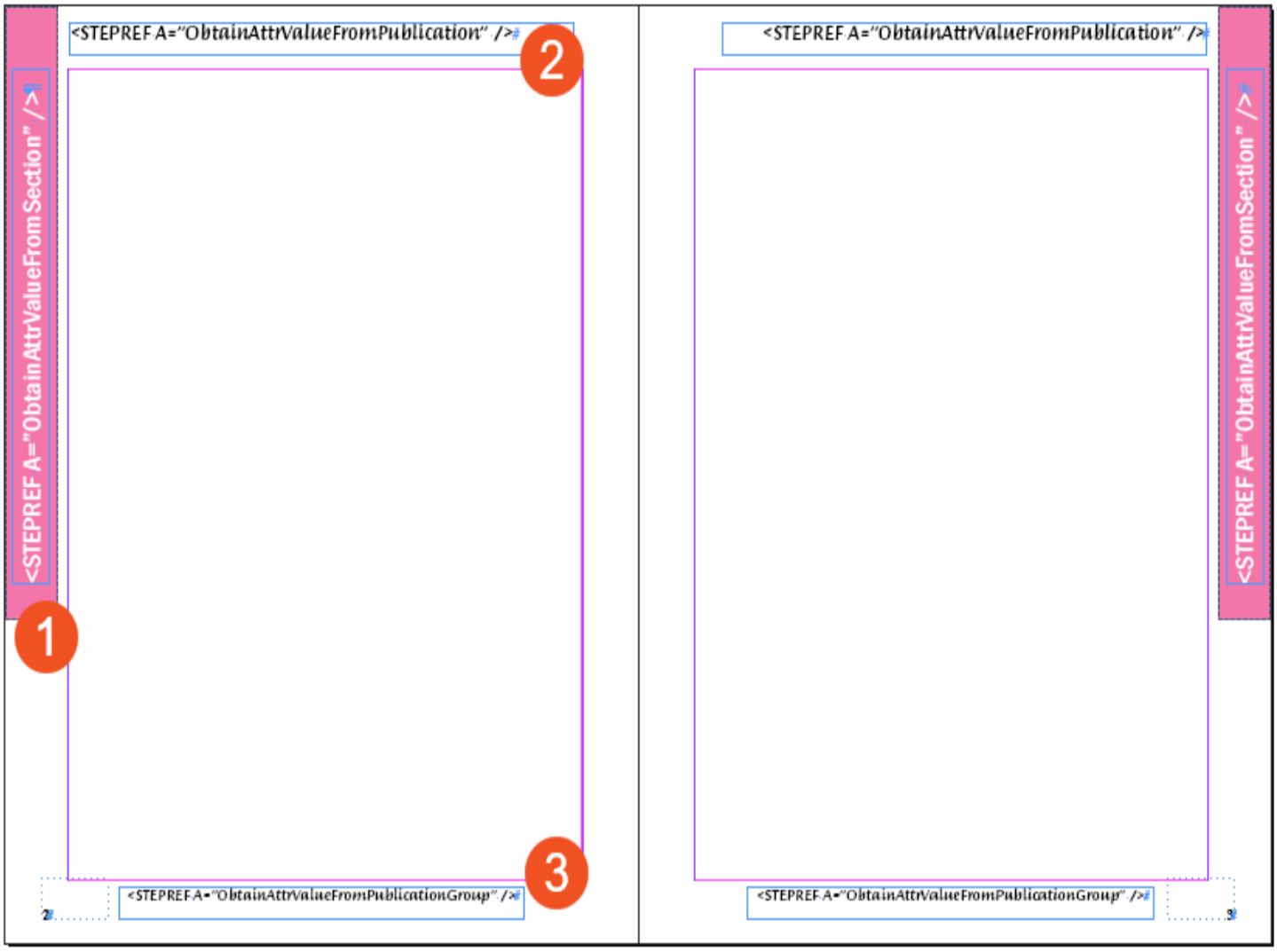
3. In the **Tree**, navigate to a Planned Page object—which resides within the publication where your metadata exists—to confirm that the values are displaying correctly.



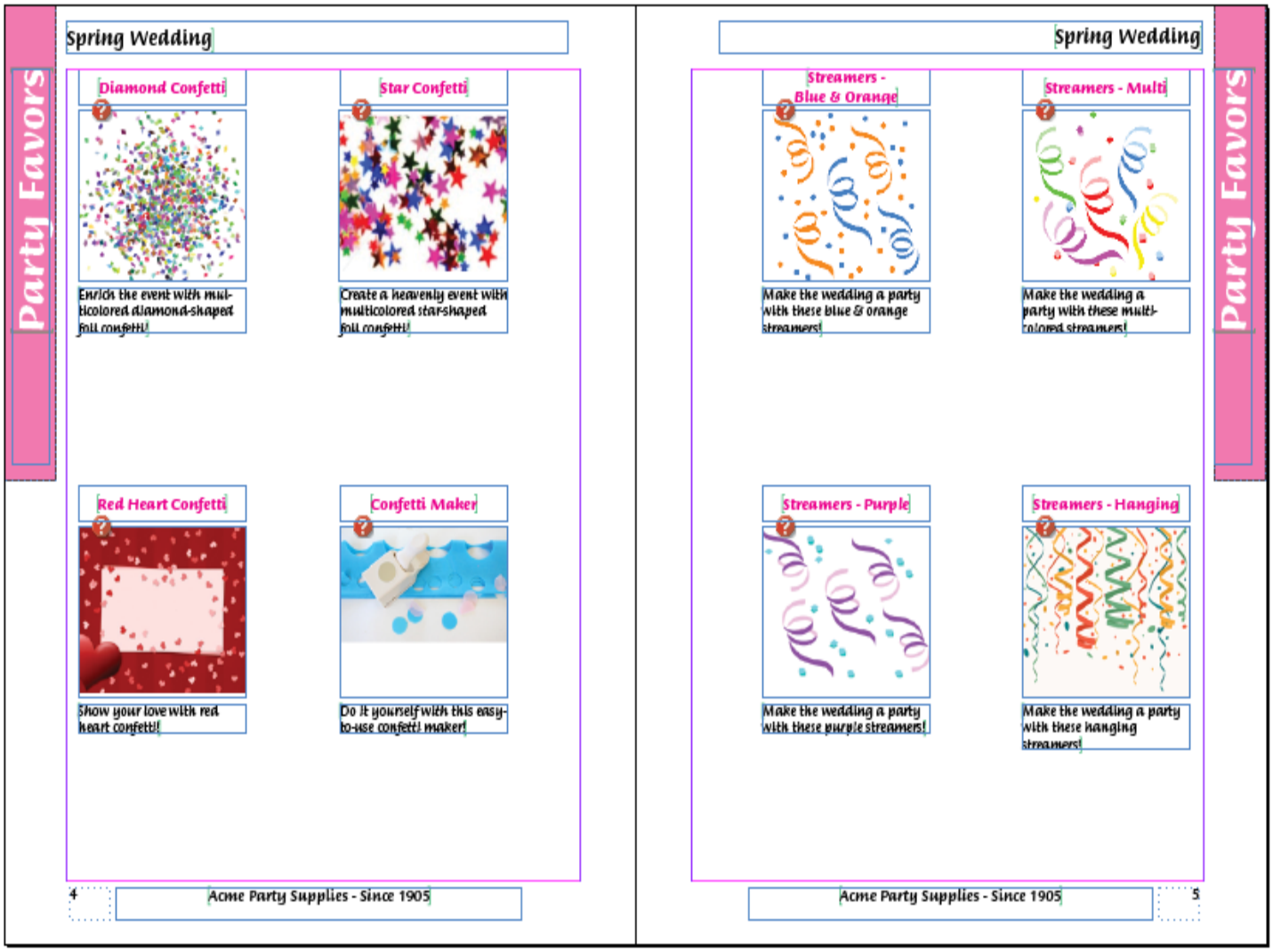
Configuring the Publication Template

1. Place the attributes on the publication template just as you would place attributes on a product template.

   Note: Attributes must be placed on the page spread, not the master spread.



2. The publication description attribute values will display on the mounted page in InDesign and the Flatplanner Preview view.


Party Favors
Spring Wedding
Diamond Confetti
Enrich the event with multicolored diamond-shaped foil confetti!
Star Confetti
Create a heavenly event with multicolored star-shaped foil confetti!
Red Heart Confetti
Show your love with red heart confetti!
Confetti Maker
Do it yourself with this easy-to-use confetti maker!
4
Acme Party Supplies - Since 1905
Spring Wedding
Streamers - Blue & Orange
Make the wedding a party with these blue & orange streamers!
Streamers - Multi
Make the wedding a party with these multi-colored streamers!
Streamers - Purple
Make the wedding a party with these purple streamers!
Streamers - Hanging
Make the wedding a party with these hanging streamers!
Acme Party Supplies - Since 1905
5
Party Favors

Confetti

4

5

Party Favors

Spring Wedding

Diamond Confetti

Enrich the event with multi-colored diamond shaped foil confetti!

Star Confetti

Create a heavenly event with multicolored star shaped foil confetti!

Streamers - Blue & Orange

Make the wedding a party with these blue & orange streamers!

Streamers - Multi

Make the wedding a party with these multi colored streamers!

Red Heart Confetti

Show your love with red heart confetti!

Confetti Maker

Do it yourself with this easy-to-use confetti maker!

Streamers - Purple

Make the wedding a party with these purple streamers!

Streamers - Hanging

Make the wedding a party with these hanging streamers

4 Acme Party Supplies - Since 1905

Acme Party Supplies - Since 1905 5

Party Favors

Assigned

Exporting and Importing Flatplanner Publications

Three formats are available for the export and import of Flatplans and Flatplanner publications: **Flatplan Excel**, **Publication Excel**, and **STEPXML**.

Using Excel and/or STEPXML files to export and import Flatplanner publications can help reduce the time spent on manual publication-building tasks in the workbench, such as the manual drag and drop of products out of Flatplanner baskets onto Flatplanner frames or the manual linking of product templates to Flatplanner frames. If all product and asset objects are already mapped to Flatplan frames on an importable Excel sheet or STEPXML file, there is not even a need to populate a Flatplanner basket.

The import of Flatplanner publications and Flatplans is suitable for users who prefer to plan their publications before building out planned pages in STEP. For example, businesses that publish sales flyers may receive page planning information from an upstream ERP system that predetermines item placement based on analysis of historical pricing and sales data. In this use case, planning decisions do not need to happen in STEP; users can skip directly to the DTP page building process once their Flatplanner publication is built in STEP with the import.

Even for users who prefer to manually plan and build their pages simultaneously in STEP, the ability to export and import Flatplans and Flatplanner publications greatly simplifies the migration of publications from one STEP system to another, reducing the number of manual steps needed to duplicate and/or rebuild these publications.

The following sections of this documentation explain the information included in the Flatplanner import / export formats, the similarities and differences between them, and where the information contained in these files exists in STEP.

- Exporting Flatplanner Publications in Excel
- Importing Flatplanner Publications in Excel
- Exporting and Importing Flatplanner Publications in STEPXML

Exporting Flatplanner Publications in Excel

The typical first step in using a **Flatplan Excel** or **Publication Excel** sheet to *import* a Flatplanner publication or Flatplan is to *export* a pre-existing Flatplanner publication or Flatplan. This exported Excel file can then be used as a 'template' sheet to import new Flatplanner publications and Flatplans.

The **Flatplan Excel** format is only available for Flatplanner publications and supports the export of section-level Flatplanner information, i.e., Flatplans. A Flatplan—also known as a plan—is composed of planned pages (also known as spreads) and the product and/or asset objects that are linked to the Flatplan frames on these pages. Flatplan Excel sheets contain information about the page templates used on each page and the product templates used on each frame. Additional frame-level information, such as X / Y coordinates and frame height and width, is also included.

While the Flatplan Excel format is only available for Flatplanner publications, the **Publication Excel** format supports all publication types: standard STEP Publisher ('drag and drop'), Flatplanner, and AutoPage. When used to export Flatplanner publications, additional columns with information specific to Flatplanner are included in the sheet.

The Flatplan Excel and Publication Excel formats are nearly identical in structure and functionality, but with a few notable differences. While the **Flatplan Excel** format only includes section-level plan information, the **Publication Excel** format includes more in-depth information about the entire Flatplanner publication.

A **Publication Excel** sheet could later be used to build an entire Flatplanner publication on import, whereas the Flatplan Excel must be used with an existing publication. The **Publication Excel** format also contains the following Flatplanner information that is not present in a basic Flatplan Excel sheet:

- Publication-level information that could be used to later create an entire publication on import (e.g., Publication ID, Version ID, Publication Template ID, and Version ID)
- Publication hierarchy metadata (description) attribute IDs and attribute values
- Pagination rules
- Layer mapping configurations
- IDs and object types of Flatplanner basket contents
- Frame type information (i.e., galley or object)
- Free Text frame contents

Note: The Publication Excel format is only available when exporting from the publication level. It is not available for exports from the publication group level or section level.

Sample Flatplanner Publication Excel Export Spreadsheet

The following screenshots show a sample Flatplanner **Publication Excel** export spreadsheet in three sections—columns A - I, J - R, and S - AG. Columns shaded light yellow appear in both the **Publication Excel** and **Flatplan Excel** formats. Both formats allow only one object per row.

	A	B	C	D	E	F	G	H	I
1	PublicationID	PublicationName	PublicationType	PublicationTemplateID	PubPageTemplateID	VersionID	VersionName	VersionContextID	VersionWorkspaceID
2	121311	Acme Party Supplies	Default publication type	109967					
3									
4						121313	English US	Context1	Main
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19					121163				
20					Doc-dev page temp				
21					4x4				
22					3x3				

	J	K	L	M	N	O	P	Q	R
1	SectionLevel	SectionID	SectionName	SectionTypeID	MetaDataAttributeID	MetaDataAttributeValue	RuleSettings	BasketObjectID	BasketObjectType
2							<Action ID="PublicationTemplateSpreadIndexAction" Ty		
3					CatalogTheme	Acme Party Supplies			
4									
5								121171	Product
6								121177	Product
7								121178	Product
8								121179	Product
9								121184	Product
10								121192	Product
11								121193	Product
12								121180	Product
13								121182	Product
14								121183	Product
15								121190	Product
16								121218	Product
17								121175	Product
18								121176	Product
19								121200	Asset
20									
21									
22									
23									
24									
25									
26									
27	1	121314	Party Hats	Section					
28					SectionTheme	Party Hats			
29	2	121316	Party Hats	Section					
30					SectionTheme	Party Hats			

	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG
1	PageNumber	PageName	PageTemplateID	PagePickupID	MountObjectID	MountObjectType	ProductTemplateID	FrameID	X	Y	Width	Height	FrameType	TextContent	AssignedUserID
31	2	Party Hats	121163												
32							121324	7917	0.85	7.25	6.9	3.0	Galley		
33					121171	Product									
34					121177	Product									
35					121190	Product									
36	3		121163												
37							121324	6552	0.75	0.75	3.37	9.5	Galley		
38					121193	Product									
39					121178	Product									
40					121179	Product									
41															
42															
43															
44	4	Confetti	Doc-dev page temp												DTPUSER
45					109954	Product	109964	200	1.0	0.75	3.25	4.63	Object		
46					109955	Product	109964	201	4.52	0.75	3.25	4.62	Object		
47					121200	Asset	109964	202	1.0	5.62	3.25	4.63	Object		
48					109953	Product	109964	203	4.52	5.62	3.25	4.63	Object		
49								204	3.03	4.03	2.56	0.94	Object	Fun for everyone!	
50	5	Confetti	Doc-dev page temp												
51					110049	Product	109964	200	0.75	0.75	3.25	4.63	Object		
52					110047	Product	109964	201	4.25	0.75	3.25	4.62	Object		
53					110046	Product	109964	202	0.75	5.62	3.25	4.63	Object		
54					110050	Product	109964	203	4.25	5.62	3.25	4.63	Object		
55	6	Napkins		121073											DTPUSER
56					109954	Product	121073	200	1.0	0.75	3.25	4.63	Object		
57					109955	Product	121073	201	4.52	0.75	3.25	4.62	Object		
58					109951	Product	121073	202	1.0	5.62	3.25	4.63	Object		
59					109953	Product	121073	203	4.52	5.62	3.25	4.63	Object		

Exporting Flatplanner Publications in Publication Excel

The typical first step in using a **Publication Excel** sheet to *import* a Flatplanner publication and/or flatplan is to *export* a pre-existing Flatplanner publication and/or flatplan. This exported Publication Excel file can then be used as a 'template' sheet to import new Flatplanner publications and flatplans.

A Flatplan—also known as a plan—is composed of planned pages (also known as spreads) and the objects that are linked to the flatplan frames on these pages. Publication Excel sheets contain information about the page templates used on each page and the product templates used on each frame. Additional frame-level information, such as X / Y coordinates and frame height and width, is also included.

The Publication Excel format supports all publication types: standard STEP Publisher ('drag and drop'), Flatplanner, and AutoPage. When used to export Flatplanner publications, additional columns with information specific to Flatplanner are included in the sheet.

Advantages of Publication Excel over Flatplan Excel

The Publication Excel format has many similarities to the **Flatplan Excel** format but has far more robust functionality. For example, the Flatplan Excel format only includes section-level plan information, whereas the Publication Excel format includes more in-depth information about the entire Flatplanner publication. Additionally, a Publication Excel sheet can be used to build an entire publication hierarchy, including new publications, whereas a Flatplan Excel must be used with an existing publication.

The Publication Excel format contains the following information that is *not* present in a Flatplan Excel sheet:

- Publication-level information that can be used later to create an entire publication on import (e.g., Publication ID, Version ID, Publication Template ID, and Version ID)
- IDs of page templates stored at the publication level
- Publication hierarchy metadata (description) attribute IDs and attribute values
- Flatplanner pagination rules
- Layer mapping configurations
- IDs and object types of Flatplanner basket contents
- Page pickup IDs
- Frame type information (i.e., galley or object)
- Free Text frame contents
- Unique keys, when used instead of IDs to identify objects that are linked to baskets and frames. Unique keys are specialized values as provided by external resources. For more information on Unique Keys, see the **Unique Keys** section of the **System Setup** / **Super User Guide** documentation.

For information on the Flatplan Excel format, see the **Exporting Flatplans in Flatplan Excel** topic.

Sample Flatplanner Publication Excel Export Spreadsheet

The following screenshots show a sample Flatplanner Publication Excel export spreadsheet in three sections. Columns shaded light yellow appear in both the Publication Excel and **Flatplan Excel** formats. Both formats allow only one object per row.

	A	B	C	D	E	F	G	H	I
1	PublicationID	PublicationName	PublicationType	PublicationTemplateID	PubPageTemplateID	VersionID	VersionName	VersionContextID	VersionWorkspaceID
2	121311	Acme Party Supplies	Default publication type	109967					
3									
4						121313	English US	Context1	Main
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19					121163				
20					Doc-dev page temp				
21					4x4				
22					3x3				

	J	K	L	M	N	O	P	Q	R
1	SectionLevel	SectionID	SectionName	SectionTypeID	MetaDataAttributeID	MetaDataAttributeValue	RuleSettings	BasketObjectID	BasketObjectType
2							<Action ID="PublicationTemplateSpreadIndexAction" Ty		
3					CatalogTheme	Acme Party Supplies			
4									
5								121171	Product
6								121177	Product
7								121178	Product
8								121179	Product
9								121184	Product
10								121192	Product
11								121193	Product
12								121180	Product
13								121182	Product
14								121183	Product
15								121190	Product
16								121218	Product
17								121175	Product
18								121176	Product
19								121200	Asset
20									
21									
22									
23									
24									
25									
26									
27	1	121314	Party Hats	Section					
28					SectionTheme	Party Hats			
29	2	121316	Party Hats	Section					
30					SectionTheme	Party Hats			

	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG
1	PageNumber	PageName	PageTemplateID	PagePickupID	MountObjectID	MountObjectType	ProductTemplateID	FrameID	X	Y	Width	Height	FrameType	TextContent	AssignedUserID
31	2	Party Hats	121163												
32							121324	7917	0.85	7.25	6.9	3.0	Galley		
33					121171	Product									
34					121177	Product									
35					121190	Product									
36	3		121163												
37							121324	6552	0.75	0.75	3.37	9.5	Galley		
38					121193	Product									
39					121178	Product									
40					121179	Product									
41															
42															
43															
44	4	Confetti	Doc-dev page temp												DTPUSER
45					109954	Product	109964	200	1.0	0.75	3.25	4.63	Object		
46					109955	Product	109964	201	4.52	0.75	3.25	4.62	Object		
47					121200	Asset	109964	202	1.0	5.62	3.25	4.63	Object		
48					109953	Product	109964	203	4.52	5.62	3.25	4.63	Object		
49								204	3.03	4.03	2.56	0.94	Object	Fun for everyone!	
50	5	Confetti	Doc-dev page temp												
51					110049	Product	109964	200	0.75	0.75	3.25	4.63	Object		
52					110047	Product	109964	201	4.25	0.75	3.25	4.62	Object		
53					110046	Product	109964	202	0.75	5.62	3.25	4.63	Object		
54					110050	Product	109964	203	4.25	5.62	3.25	4.63	Object		
55	6	Napkins		121073											DTPUSER
56					109954	Product	121073	200	1.0	0.75	3.25	4.63	Object		
57					109955	Product	121073	201	4.52	0.75	3.25	4.62	Object		
58					109951	Product	121073	202	1.0	5.62	3.25	4.63	Object		
59					109953	Product	121073	203	4.52	5.62	3.25	4.63	Object		

The BasketObjectKeyID and MountObjectKeyID columns (not pictured in the above screenshots) also appear in the Publication Excel sheet to enable the use of unique keys as object identifiers in baskets and on your Flatplans:

BasketObjectKeyID	BasketObjectID	BasketObjectType
SupplierPartNumber	121171	Product
SupplierPartNumber	121178	Product
SupplierPartNumber	121177	Product
SupplierPartNumber	12345678	Product
SupplierPartNumber	121205	Asset
SupplierPartNumber	IllustrationRoot	Classification

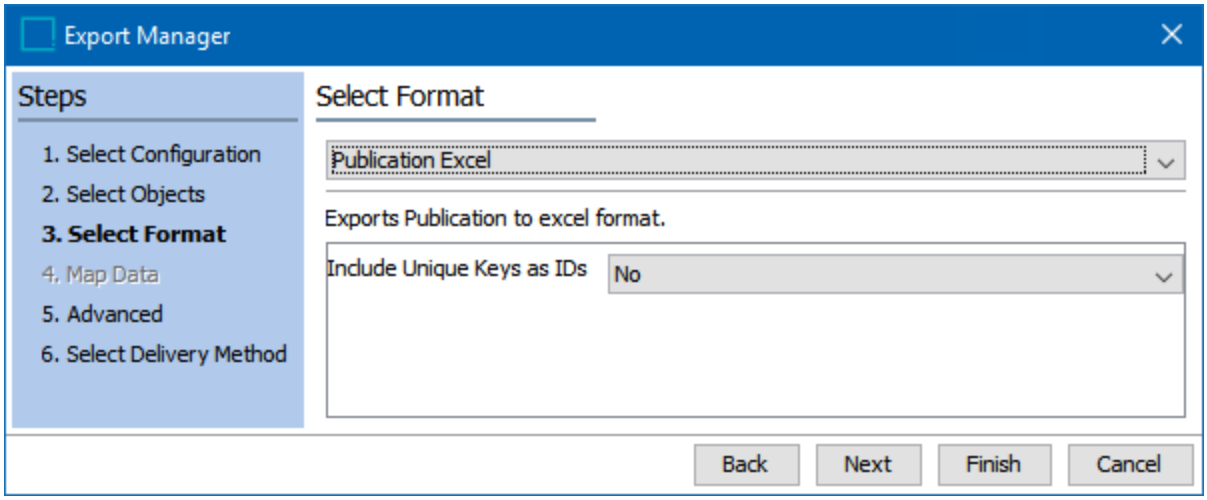
MountObjectKeyID	MountObjectID	MountObjectType
SupplierPartNumber	121171	Product
SupplierPartNumber	121177	Product
SupplierPartNumber	121190	Product
SupplierPartNumber	121193	Product
SupplierPartNumber	121178	Product
SupplierPartNumber	121179	Product

Steps for Exporting a Flatplanner Publication Excel Sheet

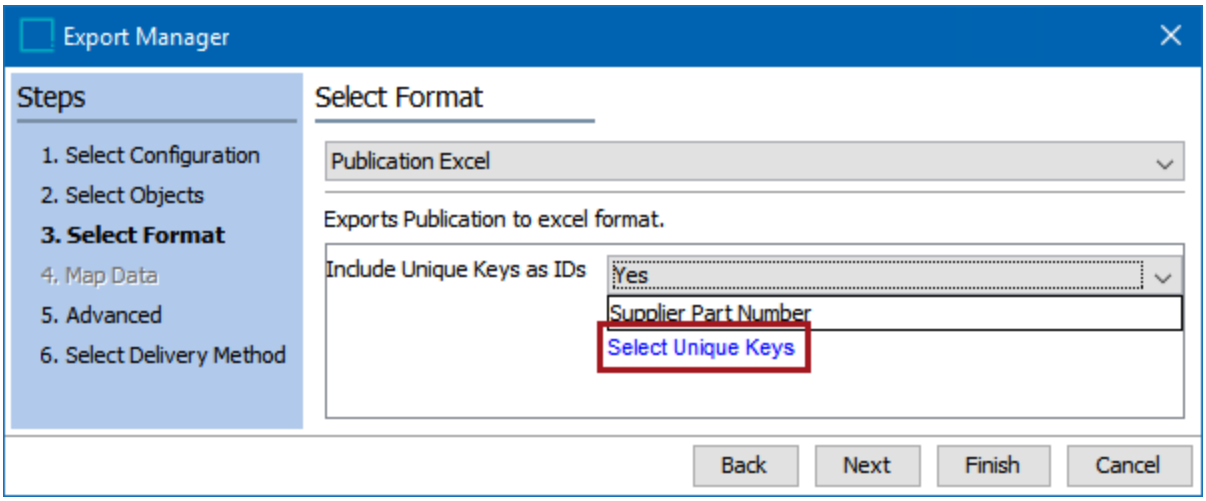
The steps to export a Flatplanner publication in the Publication Excel format are nearly identical to those of exporting a standard 'drag and drop' publication except some additional information is included for Flatplanner publications, such as pagination rules and the identifiers used for linking objects to baskets and Flatplanner frames (STEP ID and/or unique key values). For more information on what is included in the export, see the **Contents of Flatplanner Publication Excel Exports** topic.

Note: The Publication Excel format is only available when exporting from the publication level. It is not available for exports from the publication group level or section level.

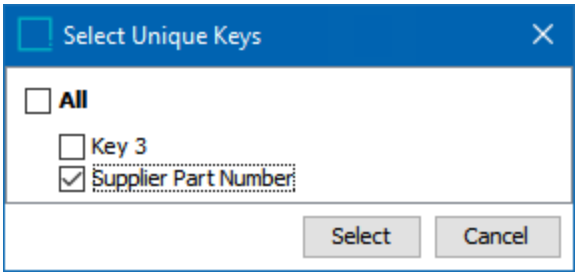
1. Follow the initial steps for exporting a Publication Excel sheet as outlined in the **Exporting a Publication Excel Sheet** topic in the **STEP Publisher** documentation.
2. On the **Select Format** screen of the Export Manager, choose **Publication Excel** from the dropdown list. If you are not using unique keys to identify the objects (typically *products*) that are linked into the baskets and Flatplanner frames, click **Next**.



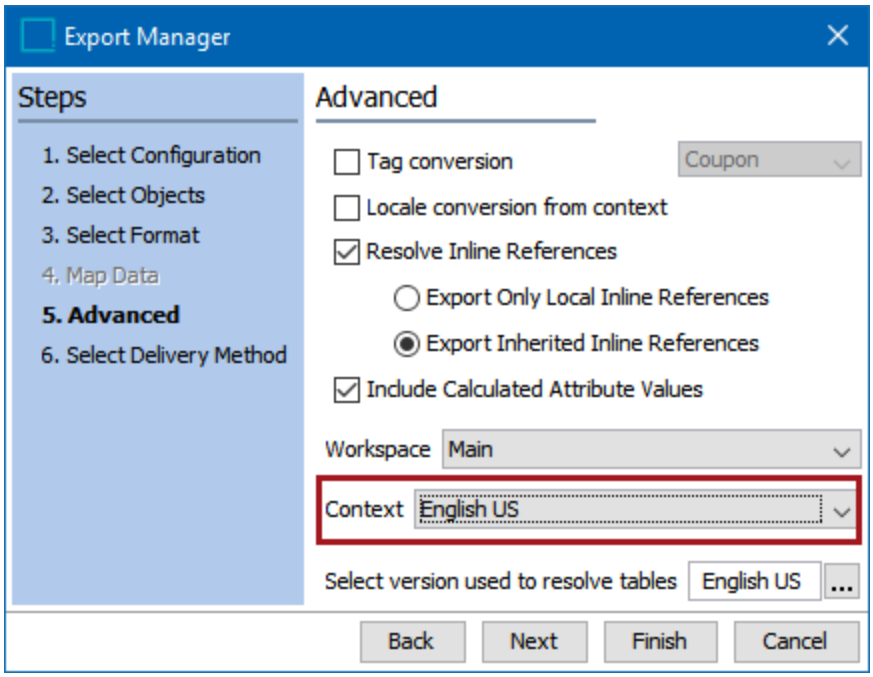
- If you *are* using unique keys to identify the objects linked into the into the baskets and Flatplanner frames, select 'Yes' from the 'Include Unique Keys as IDs' dropdown list, then click **Select Unique Keys**.



- On the Select Unique Keys dialog, all active keys in your STEP instance are displayed. Check the box(es) for the unique key values that should be included in the export, then click **Select**.



4. Since data does not need to be mapped for the Publication Excel format, the Map Data screen is skipped.
5. On the Advanced screen, choose a **Context** if you have dimension-dependent data section names or page names and need to see them in a particular language. All other settings may be ignored. Click **Next**.



6. Choose **File** as the Delivery Method in Step 6, then click **Finish**.
7. On the **Save Export Configuration** screen, check 'Save Options' if you would like to save the Export configuration.
8. Click **OK**, then retrieve the Excel file.

Considerations and Limitations

- Though multiple publications may be exported in a single Publication Excel file, multiple publications may not be *imported* in the Publication Excel format. To import multiple publications at once, the STEPXML format must be used. For information on importing publications in STEPXML, see the **Exporting and Importing Publications in STEPXML** topic.
- Support for Publication Excel export is not available in the Web UI.
- All pagination rules are exported in a single cell. If the exported publication has numerous rules, the character count can grow into the thousands. If the pagination rules character count exceeds of 32,767 characters, an error will occur. If the system property `PublicationExcelExport.OneRulePerCell=true` is added to the sharedconfig.properties file, then only one rule will display per row.

Exporting and Importing Flatplans in Flatplan Excel

The **Flatplan Excel** format is exclusively for use with existing Flatplanner publications. Through importing, it can be used to create or update sections and flatplans, which are the planned pages (spreads) within the sections.

The typical first step in using a Flatplan Excel sheet to *import* a flatplan is to *export* a pre-existing flatplan from a Flatplanner publication. This exported Excel file can then be used as a 'template' sheet to import new flatplans.

The Flatplan Excel format supports the export of section-level Flatplanner information, i.e., flatplans. A flatplan—also known as a plan—is composed of planned pages (also known as spreads) and the product and/or asset objects that are linked to the flatplan frames on these pages. Flatplan Excel sheets contain information about the page templates used on each page and the product templates used on each frame. Additional frame-level information, such as X / Y coordinates and frame height and width, is also included.

Note: Because the Flatplan Excel format only includes section-level plan information and does not contain Flatplanner information such as baskets, pagination rules, and frame types, the **Publication Excel** format is typically recommended when exporting and importing flatplans. For more information on using the Publication Excel format with Flatplanner publications, see the **Exporting Flatplanner Publications in Publication Excel** topic.

Sample Flatplan Excel Spreadsheet

The following screenshot shows a sample Flatplan Excel sheet.

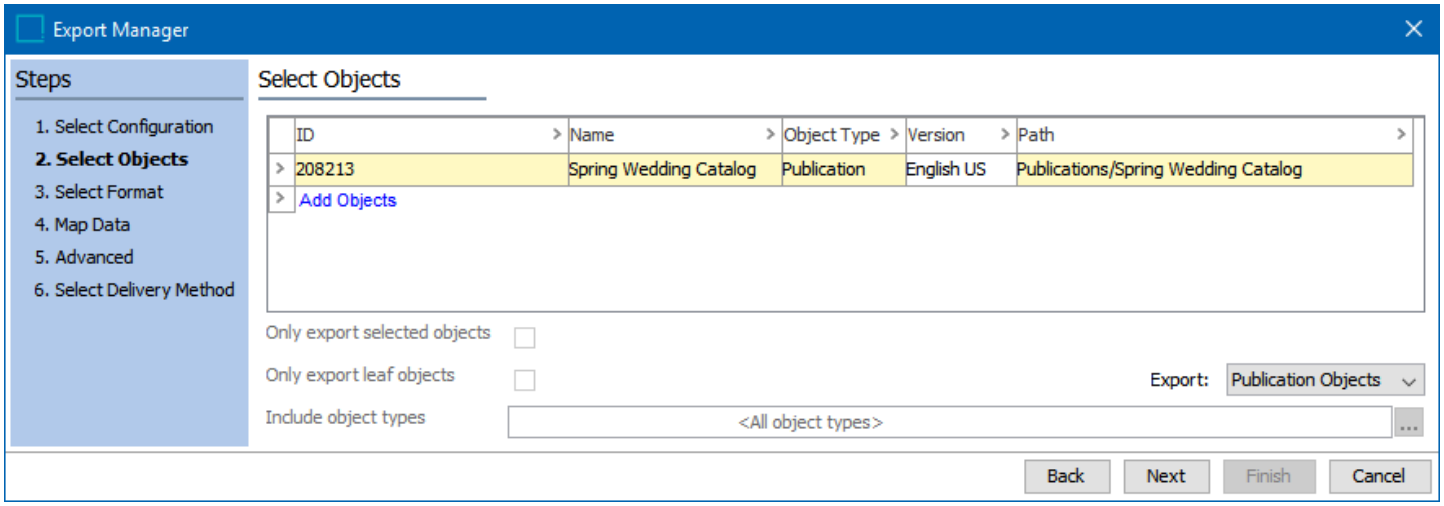
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	SectionID	SectionName	SectionTypeID	PageNumber	PageName	PageTemplateID	MountObjectID	MountObjectType	ProductTemplateID	FrameID	X	Y	Width	Height	AssignedUserID
2	128527	Chapeau de Fête	Section	2	Party Hats	121163									
3				3		121163									
4				4	Galley Page	121163									
5				5		121163									
6	128535	Party Faveurs	Section	4	Confettis	Doc-dev page tei	109954	Product	121385	200	1.0	0.75	3.25	4.63	DTPUSER
7							109955	Product	121385	201	4.52	0.75	3.25	4.62	
8							109951	Product	109964	202	1.0	5.62	3.25	4.63	
9							109953	Product	109964	203	4.52	5.62	3.25	4.63	
10				5	Confetti	Doc-dev page tei	110049	Product	109964	200	0.75	0.75	3.25	4.63	
11							110047	Product	109964	201	4.25	0.75	3.25	4.62	
12							110046	Product	109964	202	0.75	5.62	3.25	4.63	
13							110050	Product	109964	203	4.25	5.62	3.25	4.63	
14				6	Serviettes		109954	Product		200	1.0	0.75	3.25	4.63	
15							109955	Product		201	4.52	0.75	3.25	4.62	
16							109951	Product		202	1.0	5.62	3.25	4.63	
17							109953	Product		203	4.52	5.62	3.25	4.63	
18										204	3.24	0.29	2.56	0.94	
19				7	Napkins	Doc-dev page tei	121176	Product	109964	201	4.38	0.75	3.28	4.63	
20							121200	Asset		202	0.75	5.62	6.89	4.63	
21							121178	Product	109964	UpperLeft	0.75	0.75	3.38	4.63	

Steps to Export a Flatplan Excel

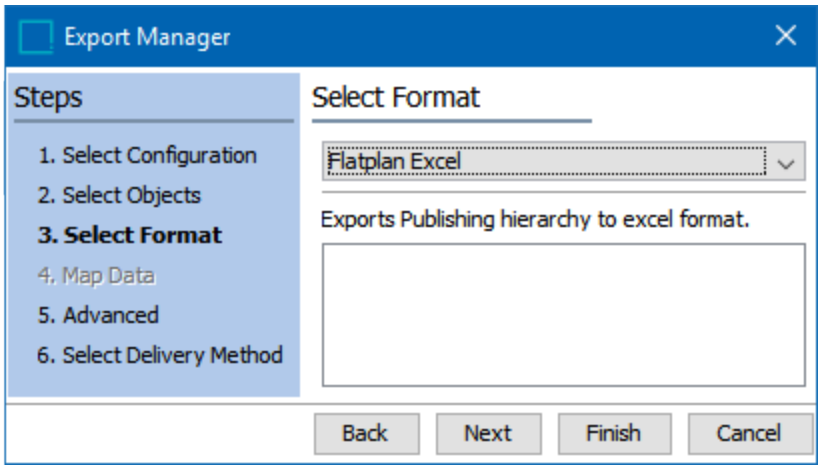
1. Right-click on a publication or section object and select **Export Data Below**, or go to File > Export > **Data**. Choose a publication if you want to export all flatplans from the entire publication. Click on a section to export the flatplans from that section only.

2. Nothing else needs to be done on the Select Objects screen, as all other options are disabled when **Publication Objects** is selected for export. Click **Next**.

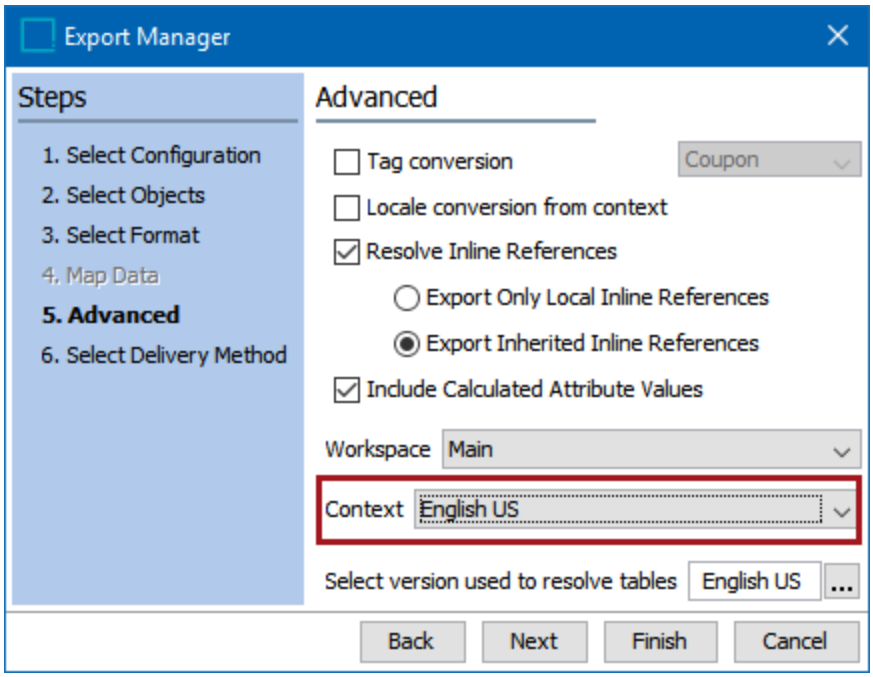
> **Note:** Though the option exists on this screen to choose a publication Version, there is no need to do so since the sheet contains information that applies to all versions in the publication.



3. On the Select Format screen, choose **Flatplan Excel** from the dropdown list, then click **Next**.



4. Since data does not need to be mapped for the Flatplan Excel format, the Map Data screen will be skipped.
5. On the Advanced screen, choose a **Context** if you have dimension-dependent section names or page names and need to see them in a particular language. All other settings may be ignored. Click **Next**.

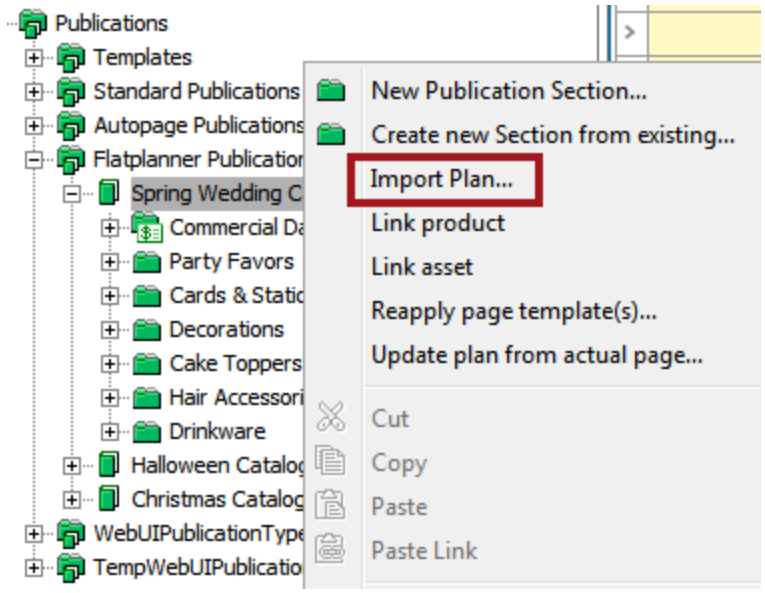


6. Choose **File** as the Delivery Method on the Select Delivery Method screen, then click **Finish**.
7. On the **Save Export Configuration** screen, check 'Save Options' if you would like to save the Export configuration.
8. Click **OK**, then retrieve the Excel file.

Importing a Flatplan Excel Sheet

Flatplan Excel sheets can be imported either at the publication or section level.

1. Right-click on the publication or section object into which you would like to import your sheet. Select **Import Plan**.



2. The **Select Excel File** dialog displays. Navigate to your Flatplan Excel import sheet and click **Open**.
3. The **Save Import Configuration** dialog displays. Click **OK**. Though you have the option to save your import configuration on this screen, there is no real need to do so, as no mapping is required for a Flatplan Excel import.
4. The import process will begin automatically. Click **Go to process** on the **Starting process Importing** dialog if you would like to monitor the import Background Process as the Plan imports.

Considerations and Limitations

- **Flatplan Excel** files cannot be imported using File > Import > Data. Flatplan Excel sheets must be imported by a right-click action on either publication or section objects.
- Frame sizes and X / Y coordinates cannot be altered with Publication Excel or Flatplan Excel imports. Frame sizes will remain the same size as specified by the page template that is linked to the page.

Contents of Flatplanner Publication Excel Exports

The following table outlines the contents of both Excel formats available for Flatplanner Publication Excel exports—**Publication Excel** and **Flatplan Excel**—in the order that the columns appear:

Column Header	Description	Publication Excel	Flatplan Excel
PublicationID	STEP ID of exported publication	Yes	No
PublicationName	STEP Name of exported publication	Yes	No
PublicationType	Object type ID of exported publication	Yes	No
PublicationTemplateID	STEP ID of publication template linked to the exported publication	Yes	No
PubPageTemplateID	STEP ID of page template(s) linked to the exported publication	Yes	No
VersionID	STEP ID of the publication version(s) of the exported publication	Yes	No
VersionName	STEP Name of the publication version(s) of the exported publication	Yes	No
VersionContextID	STEP ID of the context(s) used in the publication version(s) of the exported publication	Yes	No
VersionWorkspaceID	STEP ID of the workspace(s) used in the publication version(s) of the exported publication	Yes	No
SectionLevel	A number that represents whether the section is a top-level section (1) or a subsection (2, 3, 4, etc.)	Yes	No
SectionID	STEP ID of the exported publication section(s)	Yes	Yes
SectionName	STEP Name of the exported publication section(s)	Yes	Yes

Column Header	Description	Publication Excel	Flatplan Excel
SectionTypeID	Object type ID of the exported publication section(s)	Yes	Yes
MetaDataAttributeID	STEP ID of metadata (description) attributes linked to the publication or section (column will not appear in the export if there are no values populated for the metadata attributes)	Yes	No
MetaDataAttributeValue	Value of metadata (description) attributes linked to the publication or section (column will not appear in the export if there are no values populated for the metadata attributes)	Yes	No
RuleSettings	Pagination rules used in the publication(s) and sections **Example**: <Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parametertemplateSpreadIndex="1"> <Condition ID="AlwaysCondition" /> </Action>	Yes	No
BasketObjectKeyID	If using unique keys instead of STEP IDs to identify objects linked to the basket, this column will contain the ID of the unique key associated with the object. For more information on unique keys, see the **Unique Keys** topic in the **System Setup** / **Super User Guide** documentation.	Yes	No
BasketObjectID	STEP ID of the product(s) and/or asset(s) linked into the Flatplanner basket. If using unique keys instead of STEP IDs to identify objects linked to the basket, this column will contain the value of the unique key.	Yes	No
BasketObjectType	Value will either be 'Product,' 'Asset,' or 'Classification,' depending on whether a product object, asset object, or classification object is linked to the Flatplanner basket. 'Product,' 'Asset,' and 'Classification' are generic terms referring to the object super types and do not specify the exact object types.	Yes	No

Column Header	Description	Publication Excel	Flatplan Excel
PageNumber	Page number of the planned page	Yes	Yes
PageName	STEP Name of the planned page	Yes	Yes
PageTemplateID	STEP ID of the page template linked to the planned page	Yes	Yes
PagePickupID	STEP ID of the actual page that was picked up as the layout for the planned page	Yes	No
MountObjectKeyID	If using unique keys instead of STEP IDs to identify objects linked to the Flatplanner frame, this column will contain the ID of the unique key associated with the object. For more information on unique keys, see the **Unique Keys** topic in the **System Setup** / **Super User Guide** documentation.	Yes	No
MountObjectID	STEP ID of the product or asset object linked to the Flatplanner frame. If using unique keys instead of STEP IDs to identify objects linked to the frame, this column will contain the value of the unique key.	Yes	Yes
MountObjectType	Value will either be 'Product,' 'Asset,' or 'Classification,' depending on whether a product object, asset object, or classification object is linked to the Flatplanner frame. 'Product,' 'Asset,' and 'Classification' are generic terms referring to the object super types and do not specify the exact object types.	Yes	Yes
ProductTemplateID	• In the **Publication Excel** format, this column contains the STEP ID(s) of the product template(s) linked to the exported **publication** and each individual Flatplan frame • In the **Flatplan Excel** format, this column only contains the STEP ID(s) of the product template(s) linked to each individual Flatplan frame	Yes	Yes

Column Header	Description	Publication Excel	Flatplan Excel
FrameID	STEP ID of the Flatplanner frame	Yes	Yes
X	X coordinate of the Flatplanner frame on the planned page	Yes	Yes
Y	Y coordinate of the Flatplanner frame on the planned page	Yes	Yes
Width	Width of the Flatplanner frame	Yes	Yes
Height	Height of the Flatplanner frame	Yes	Yes
FrameType	Value will either be 'Object' or 'Galley', depending on whether the Flatplanner frame contains a product, asset, or free text ('Object') or is a Galley text frame ('Galley')	Yes	No
TextContent	Free text content of the Flatplanner frame	Yes	No
AssignedUserID	STEP user who is currently assigned the planned page in the Flatplanner workflow	Yes	Yes

Location of Flatplanner Publication Export Information in STEP

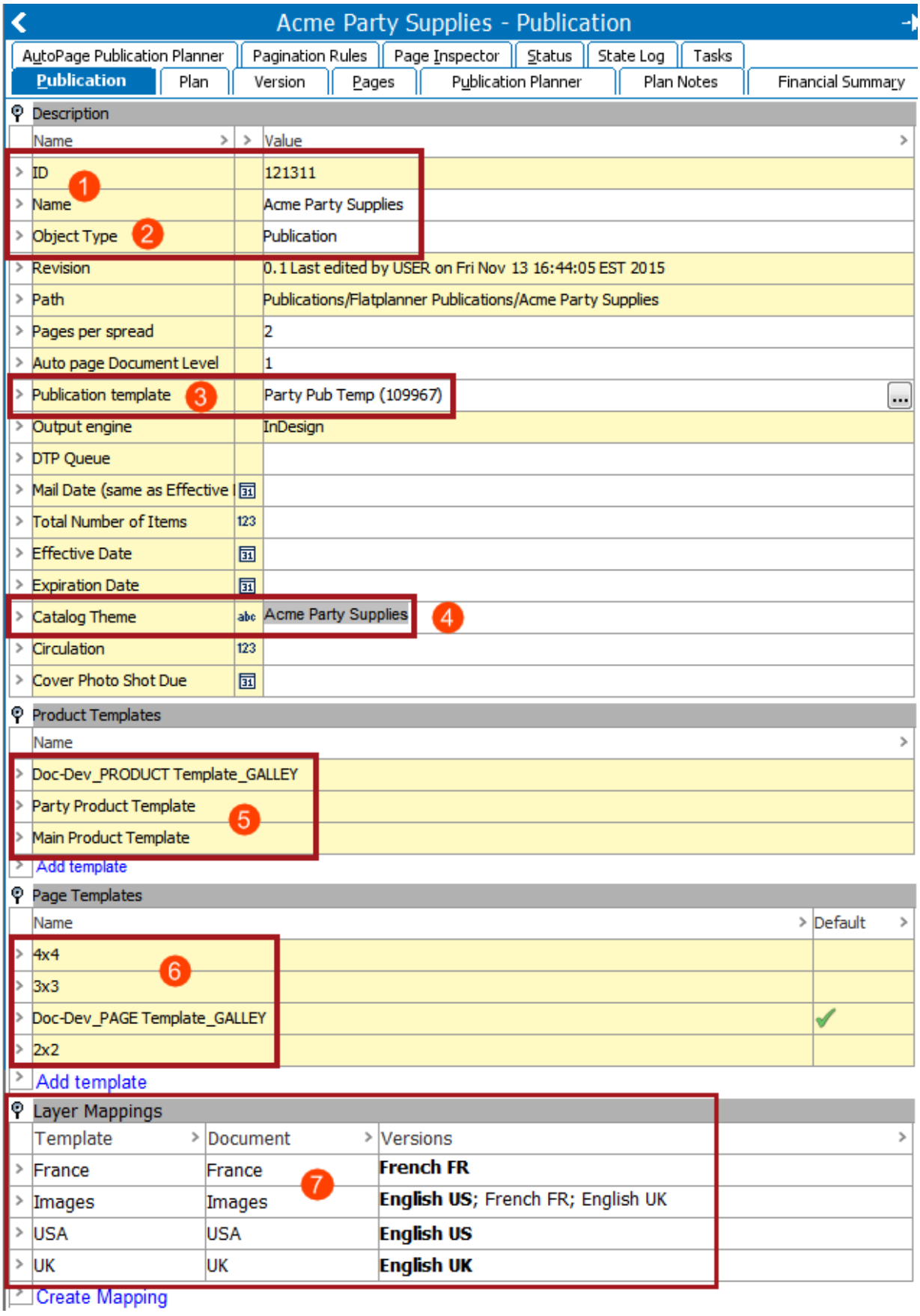
The following sections use a sample Flatplanner publication to illustrate where the information included in Flatplanner **Publication Excel** and **Flatplan Excel** exports resides in the STEP Workbench.

The information in this topic is also applicable for STEPXML exports, but the 'tags' listed in this topic are the column headers that appear in Publication Excel files. For more information on STEPXML exports of Flatplanner publications, see the **Exporting and Importing Flatplanner Publications in STEPXML** topic.

Publication Tab

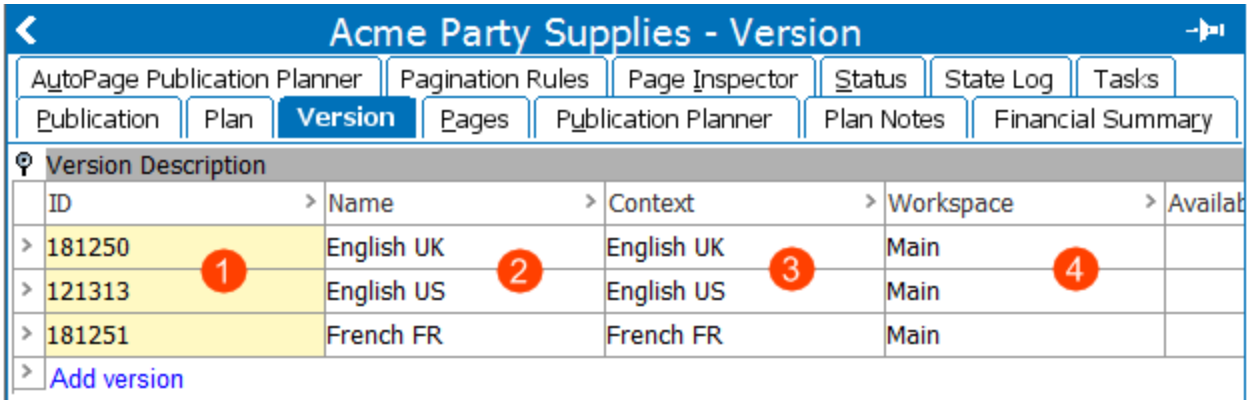
1. The **PublicationID** and **PublicationName** columns will contain the STEP ID and STEP Name of the publication, respectively.
2. The **PublicationType** column will contain the object type ID of the publication.
3. The **PublicationTemplateID** column will contain the STEP ID of the publication template.
4. The **MetaDataAttributeID** and **MetaDataAttributeValue** columns will contain the STEP ID(s) and STEP Names(s) of populated metadata attributes that appear on the publication and section(s). Note that if a publication (or section) has linked metadata attributes but these attributes do not contain values, the **MetaDataAttributeID** and **MetaDataAttributeValue** columns will not appear on the exported sheet.
5. The **ProductTemplateID** column will contain the STEP ID(s) of the product template(s).
6. The **PubPageTemplateID** column will contain the STEP ID(s) of the page template(s).
7. The **LayerMappingTemplate** column will contain the name of the layer in the templates (publication, product, and InDesign-created page templates); **LayerMappingDocument** will contain the name of the corresponding layer in the Publication Document (mounting page); and **LayerMappingOwner** will display whether the publication version to which the layer is mapped is the owner of the layer—value of 'true' or 'false.' In the following screenshot, 'English US' (displayed in bold) is the owner of the 'Images' layer.

Note: When exporting a 'model' Flatplanner publication in order to use the resulting publication Excel sheet as a template for later Flatplanner publication imports, it is recommended to populate at least one metadata attribute on the publication (and each section) with a 'dummy' value. This ensures that the MetaDataAttributeID and MetaDataAttributeValue columns appear on the 'template' sheet and will not have to be manually inserted later.


Acme Party Supplies - Publication
AutoPage Publication Planner
Pagination Rules
Page Inspector
Status
State Log
Tasks
Publication
Plan
Version
Pages
Publication Planner
Plan Notes
Financial Summary
Description
Name
Value
ID
121311
Name
Acme Party Supplies
Object Type
Publication
Revision
0.1 Last edited by USER on Fri Nov 13 16:44:05 EST 2015
Path
Publications/Flatplanner Publications/Acme Party Supplies
Pages per spread
2
Auto page Document Level
1
Publication template
Party Pub Temp (109967)
Output engine
InDesign
DTP Queue
Mail Date (same as Effective
Total Number of Items
Effective Date
Expiration Date
Catalog Theme
Acme Party Supplies
Circulation
Cover Photo Shot Due
Product Templates
Name
Doc-Dev_PRODUCT Template_GALLEY
Party Product Template
Main Product Template
Add template
Page Templates
Name
Default
4x4
3x3
Doc-Dev_PAGE Template_GALLEY
2x2
Add template
Layer Mappings
Template
Document
Versions
France
France
French FR
Images
Images
English US; French FR; English UK
USA
USA
English US
UK
UK
English UK
Create Mapping
1
2
3
4
5
6
7

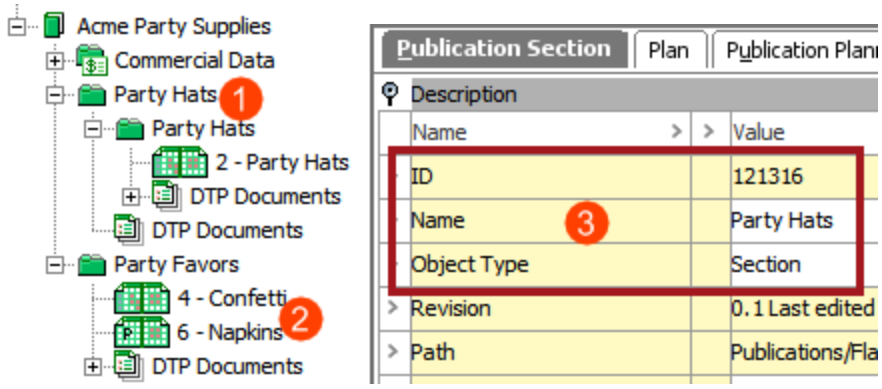
Version Tab

1. The **VersionID** column will contain the STEP ID(s) of the publication version(s).
2. The **VersionName** column will contain the STEP Name(s) of the publication version(s).
3. The **VersionContextID** column will contain the STEP ID(s) of the context(s) to which each publication version is linked. (**Note:** The context *name* is displayed in the workbench.)
4. The **VersionWorkspaceID** column will contain the STEP ID of the workspace to which each publication version is linked (will either be 'Main' or 'Approved').



Sections and Planned Pages

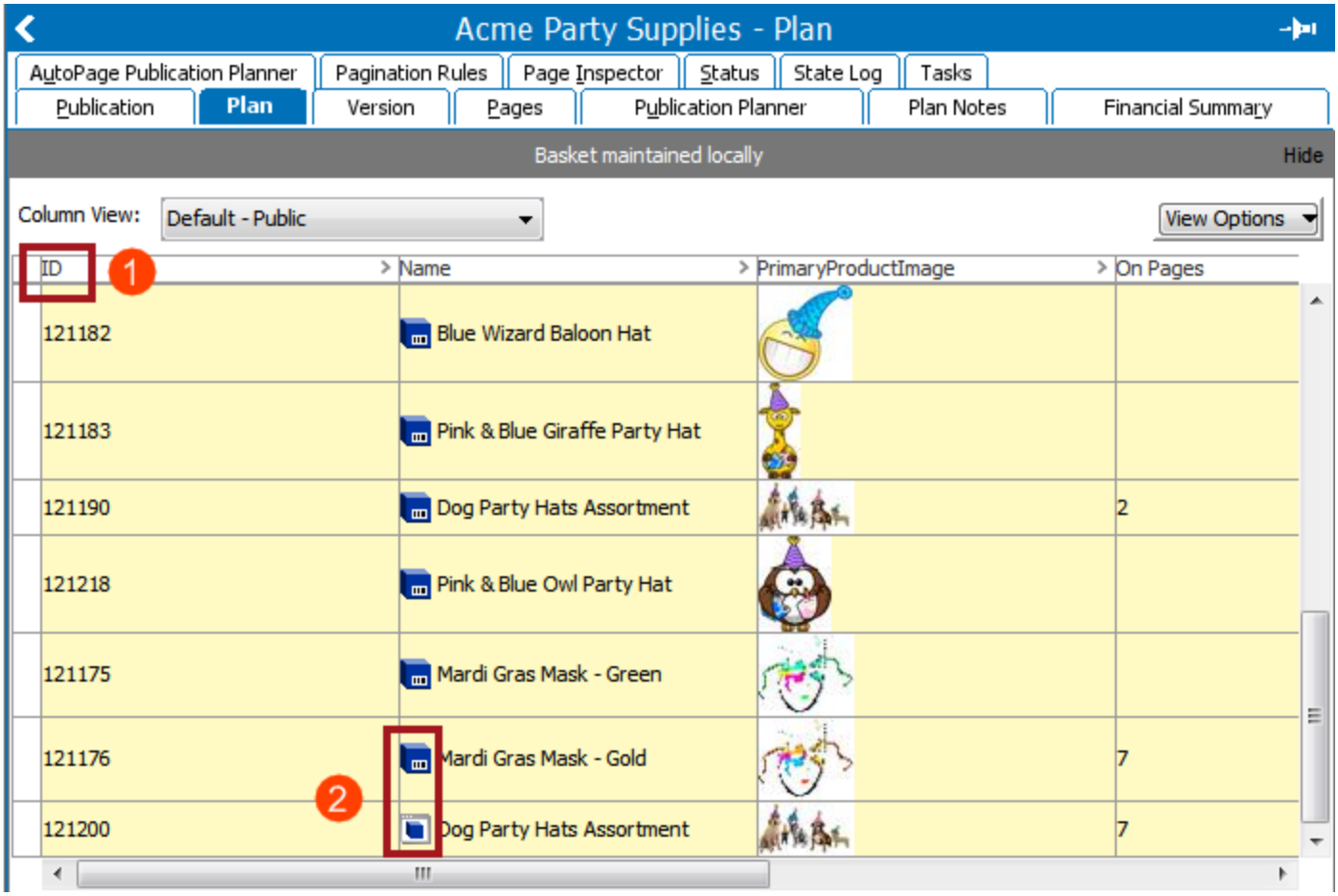
1. The **SectionLevel** column will contain a number that represents whether the section is a top-level section (1) or a subsection (2, 3, 4, etc.).
2. The **PageNumber** and **PageName** columns will contain the page number and name of planned pages.
3. The **SectionID**, **SectionName**, and **SectionTypeID** columns will contain the STEP IDs, STEP Name, and STEP object type of all sections and subsections.



Plan Tab – Basket

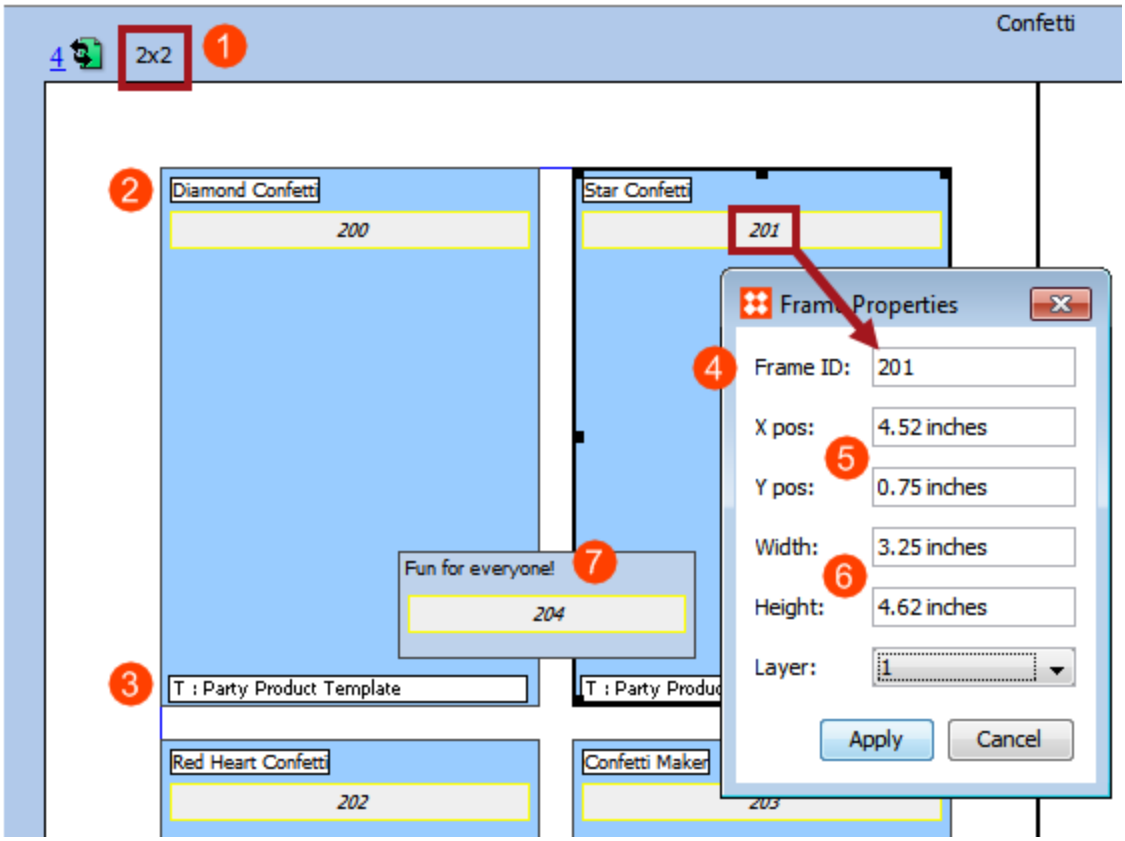
1. The **BasketObjectID** column will contain the STEP ID of the objects linked into the Flatplanner Basket

2. The **BasketObjectType** column will contain 'Product' or 'Asset' depending on whether a product object or an asset object is linked to the Flatplanner Basket.



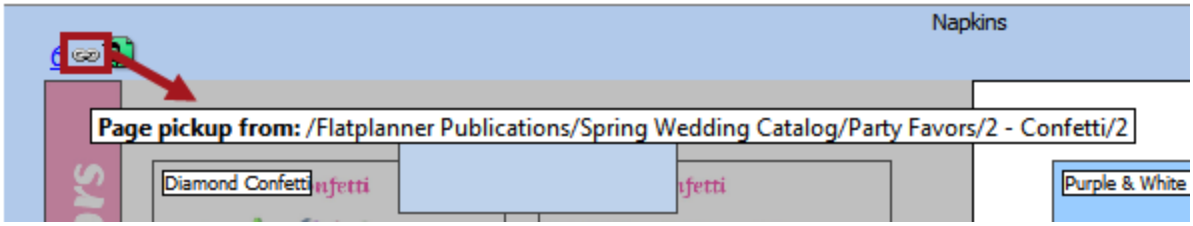
Plan Tab – Page Information

1. The **PageTemplateID** column will contain the STEP ID of the page template used on the Flatplan page. (**Note:** The page template *name* is displayed in the Plan view in the Workbench.)
2. The **MountObjectID** column will contain the STEP ID of the object linked to the Flatplanner frame. (**Note**: The object *name* is displayed in the Plan view in the Workbench.)
3. The **ProductTemplateID** column will contain the STEP ID of the product template linked to the Flatplanner frame. (**Note:** the product template *name* is displayed in the Plan view in the workbench.)
4. The **FrameID** column will contain the STEP ID of the Flatplanner frame.
5. The **X** and **Y** columns will contain the X and Y coordinates of the Flatplanner frame.
6. The **Width** and **Height** columns will contain the dimensions of the Flatplanner frame.
7. the **TextContent** frame will contain the content of Free Text frames.

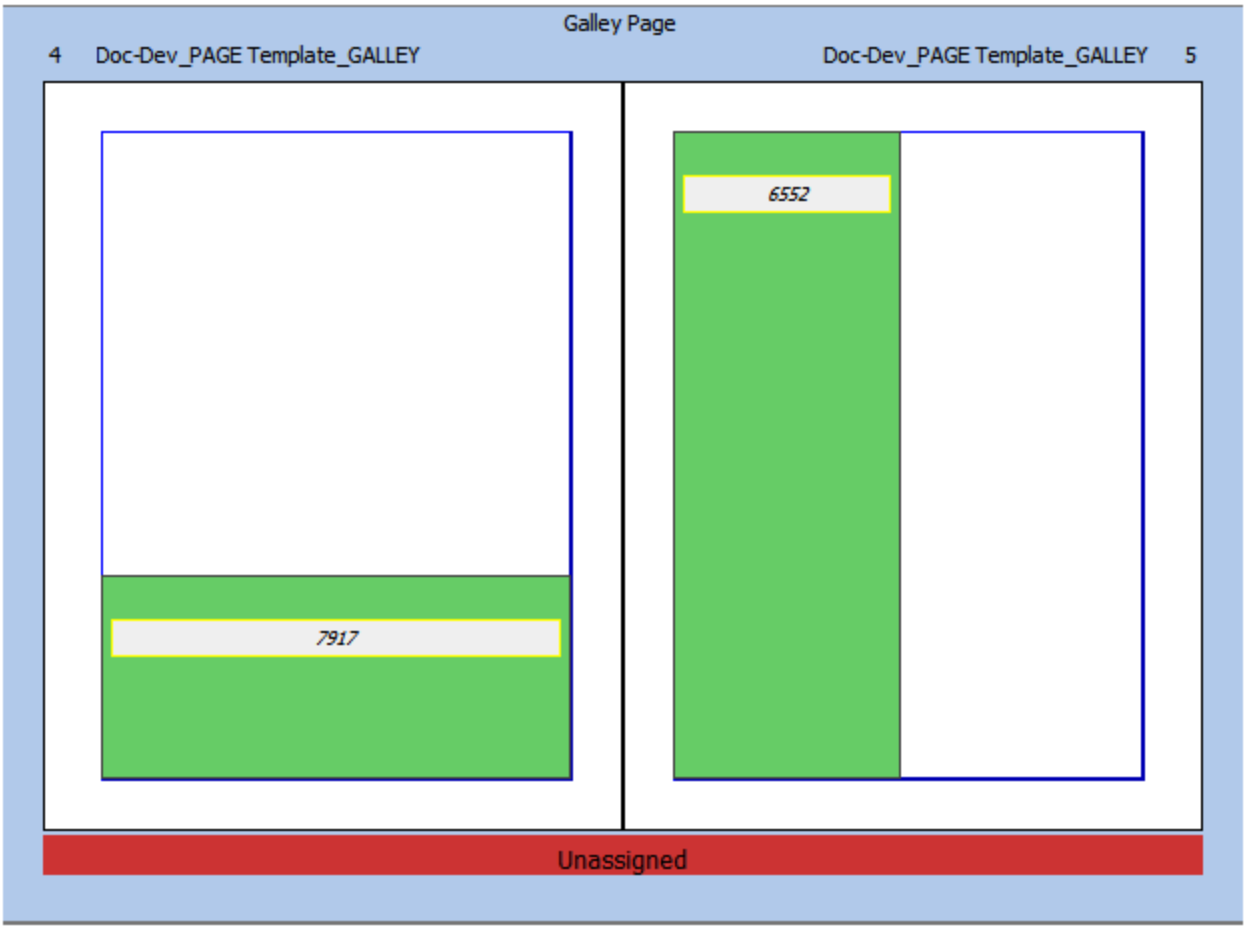


8. The **MountObjectType** column will contain 'Product' or 'Asset' depending on whether a product object (left) or an asset object (right) is linked to the Flatplanner frame.

9. The **PagePickupID** column will contain the STEP ID of the Actual Page that was picked up as the layout for the planned page. (**Note:** The *link* to the actual page is displayed in the tooltip text in the Plan view.)

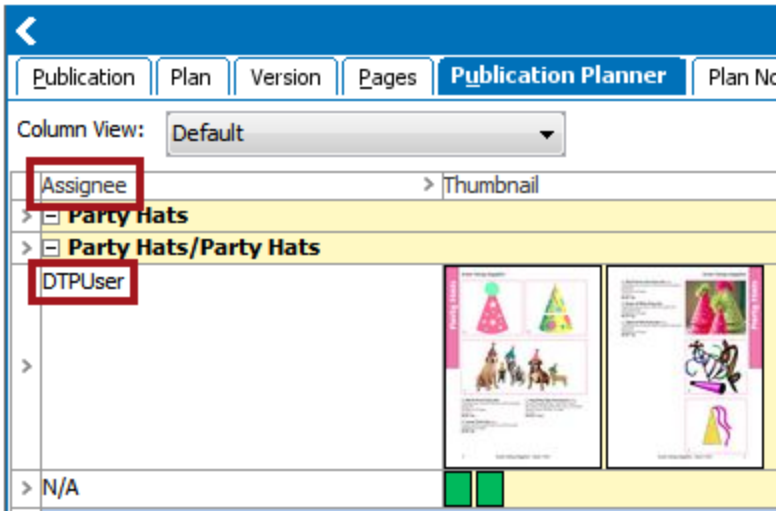


10. The **FrameType** column will contain either 'Object' or 'Galley' depending on whether a standard page template (blue frames) or Galley page template (green frames) is used on the page. Pictured below is a Galley page template as viewed in the Plan view.



Publication Planner Tab

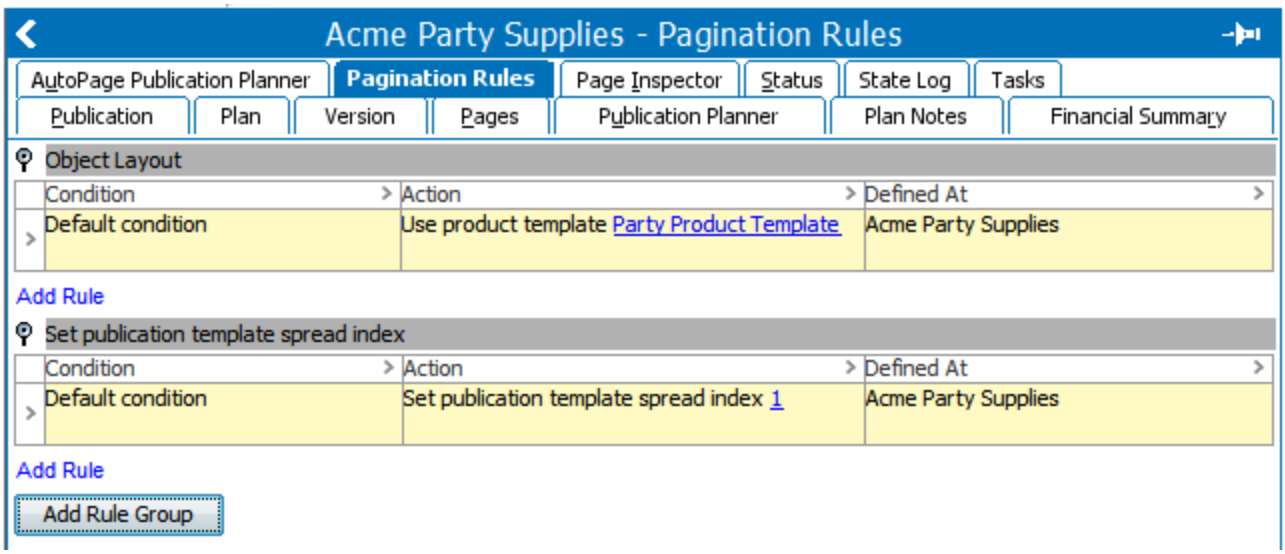
The **AssignedUserID** column will display the User who has been assigned the page in the Flatplanner workflow.



Pagination Rules Tab

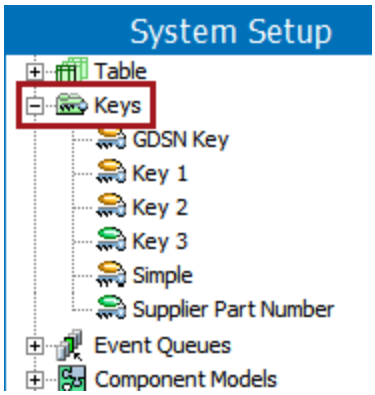
STEPXML code for **Pagination Rules** linked to the publication and/or sections will be included in the **RuleSettings** column. The screenshot below shows a pagination rule set at the top level of the publication. Note that if a publication has no pagination rules, the **RuleSettings** column will not appear on the exported sheet.

Note: When exporting a 'model' publication in order to use the resulting Publication Excel sheet as a template for later publication imports, it is recommended to manually set up the desired pagination rules first. This ensures that the **RuleSettings** column appears on the 'template' sheet and will not have to be manually inserted later.



Unique Keys

Unique keys can be used instead of STEP IDs to identify objects linked to Flatplanner baskets and Flatplanner frames. Keys are stored in System Setup > **Keys**.



1. The **BasketObjectKeyID** column will contain the ID of the unique key used to identify the object being linked to the basket.
2. When a unique key is used to identify objects linked to baskets, the *value* of the unique key will display in the **BasketObjectID** column.
3. The **MountObjectKeyID** column will contain the ID of the unique key used to identify the object being linked to the Flatplanner frame.
4. When a unique key is used to identify objects linked to frames, the *value* of the unique key will display in the **MountObjectID** column.

For more information on unique keys, see the **Unique Keys** topic in the **System Setup** / **Super User Guide** documentation.

Importing Flatplanner Publications in Publication Excel

Entire Flatplanner publications can be created or updated with the import of a **Publication Excel** spreadsheet. For existing Flatplanner publications, the **Flatplan Excel** format can be used to create or update sections and Flatplans, which are the planned pages (spreads) within the sections.

The typical first step in importing a Flatplanner publication and/or flatplan is to *export* a pre-existing Flatplanner publication. The resulting Publication Excel or Flatplan Excel file can then be used as a 'template' sheet for new Flatplanner publications or Flatplans, i.e., existing information on the export sheet will be replaced with new information for the subsequent import.

For more information on exporting Flatplanner publications in either Excel format, see the **Exporting Flatplanner Publications in Excel** topic.

Importing a Flatplanner Publication Excel Sheet

The steps to import or update a Flatplanner publication using a **Publication Excel** sheet are nearly identical to those of importing a Publication Excel for any other publication type, with the exception of the additional Flatplanner-specific columns needed for Flatplanner publications.

While some fields may be left blank on the Publication Excel sheet to successfully create a new Flatplanner publication (e.g., PublicationName, MetaDataAttributeID, and RuleSettings) all Flatplanner-specific fields on the Publication Excel sheet must be filled out if your intention is to update an existing Flatplanner publication. If you want to create a *new* Flatplanner publication or Flatplan—and you have configured the STEP IDs to autogenerate for your publication, section, and version object types—then the ID fields for these object types should be left blank.

For step-by-step **Publication Excel** import instructions, see the **Importing a Publication Excel Sheet** section of the **STEP Publisher** documentation.

Mandatory and Optional Information for Flatplanner Publication Excel Imports

A comprehensive list of mandatory and optional information for Publication Excel imports is listed in the **Importing Publications in Excel** section of the **STEP Publisher** documentation. The below table addresses the Flatplanner-specific fields.

Though many columns are not mandatory to create the publication itself, leaving these fields blank means that any missing information will have to be manually created after the import, thus negating much of the purpose of creating the publication by import.

Column Header	Description	Mandatory?
PubPageTemplateID	STEP ID of page template(s) linked to the exported publication	No, but it is strongly recommended to provide this information. If not provided in the import, a page template must be manually linked to the publication before it can be used for production.
RuleSettings	Pagination rules used in the publication(s) and sections **Example**: <Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parametertemplateSpreadIndex="1"> <Condition ID="AlwaysCondition" /> </Action>	No
BasketObjectKeyID	If using unique keys instead of STEP IDs to identify objects linked to the basket, this column will contain the ID of the unique key associated with the object. For more information on unique keys, see the **Unique Keys** topic in the **System Setup** / **Super User Guide** documentation.	No
BasketObjectID	STEP ID of the product(s) and/or asset(s) linked into the Flatplanner basket. If using unique keys instead of STEP IDs to identify objects linked to the basket, this column will contain the value of the unique key.	No (**Yes** if you have provided a BasketObjectKeyID)
BasketObjectType	Value will either be 'Product,' 'Asset,' or 'Classification,' depending on whether a product object, asset object, or classification object is linked to the Flatplanner basket. 'Product,' 'Asset,' and 'Classification' are generic terms referring to the object super types and do not specify the exact object types.	No (**Yes** if you have provided a BasketObjectID, as the possibility exists that a product object could share the same STEP ID as an asset or classification object)

Column Header	Description	Mandatory?
PageNumber	Page number of the planned page	No
PageName	STEP Name of the planned page	No
PageTemplateID	STEP ID of the page template linked to the planned page	No
PagePickupID	STEP ID of the actual page that was picked up as the layout for the planned page	No
MountObjectKeyID	If using unique keys instead of STEP IDs to identify objects linked to the Flatplanner frame, this column will contain the ID of the unique key associated with the object. For more information on unique keys, see the **Unique Keys** topic in the **System Setup** / **Super User Guide** documentation.	No
MountObjectID	STEP ID of the product or asset object linked to the Flatplanner frame. If using unique keys instead of STEP IDs to identify objects linked to the frame, this column will contain the value of the unique key.	No (**Yes** if you have provided a MountObjectKeyID)
MountObjectType	Value will either be 'Product,' 'Asset,' or 'Classification,' depending on whether a product object, asset object, or classification object is linked to the Flatplanner frame. 'Product,' 'Asset,' and 'Classification' are generic terms referring to the object super types and do not specify the exact object types.	No (**Yes** if you have provided a BasketObjectID, as the possibility exists that a product object could share the same STEP ID as an asset or classification object)
ProductTemplateID	This column serves a dual purpose for Flatplanner publications. It contains the STEP ID(s) of the product template(s) linked to the entire publication *and* to each individual Flatplan frame	No, but it is *strongly* recommended to provide this information. If not provided in the import, a product template must be manually linked to

Column Header	Description	Mandatory?
		the publication before it can be used for production.
FrameID	STEP ID of the Flatplanner frame	No
X	X coordinate of the Flatplanner frame on the planned page	No
Y	Y coordinate of the Flatplanner frame on the planned page	No
Width	Width of the Flatplanner frame	No
Height	Height of the Flatplanner frame	No
FrameType	Value will either be 'Object' or 'Galley', depending on whether the Flatplanner frame contains a product, asset, or free text ('Object') or is a Galley text frame ('Galley')	No
TextContent	Free text content of the Flatplanner frame	No
AssignedUserID	STEP user who is currently assigned the planned page in the Flatplanner workflow	No

Considerations and Limitations

Frame sizes and X / Y coordinates cannot be altered with Publication Excel imports. Frame sizes will remain the same size as specified by the page template that is linked to the page.

Exporting and Importing Flatplanner Publications in STEPXML

Flatplanner publications can be exported and imported using the STEPXML format.

This topic explains the manual process for exporting Flatplanner publications in STEPXML using the **Export Manager** in the STEP Workbench, the outbound parameters available for Flatplanner publications, a sample XML file, and a description of the tags inside the resulting STEPXML file.

This topic details the most common tags that will appear in a STEPXML export of a Flatplanner publication. For a comprehensive list of STEPXML tags, refer to the STEPXML **XSD** file located in the **STEP API** documentation, which is accessible from the Start Page of your STEP instance.

Importing a Flatplanner Publication in STEPXML

Product, asset, and/or classification objects can be linked to the frames of Flatplanner planned pages by importing a STEPXML file. This same file can also be used to create the publication structure, the publication, and to link the relevant publication template, page templates, and product templates to the publication, the planned pages, and the page frames, respectively. An example of a STEPXML file that can be used to import a Flatplanner publication is provided later in this topic in the 'File Example' section.

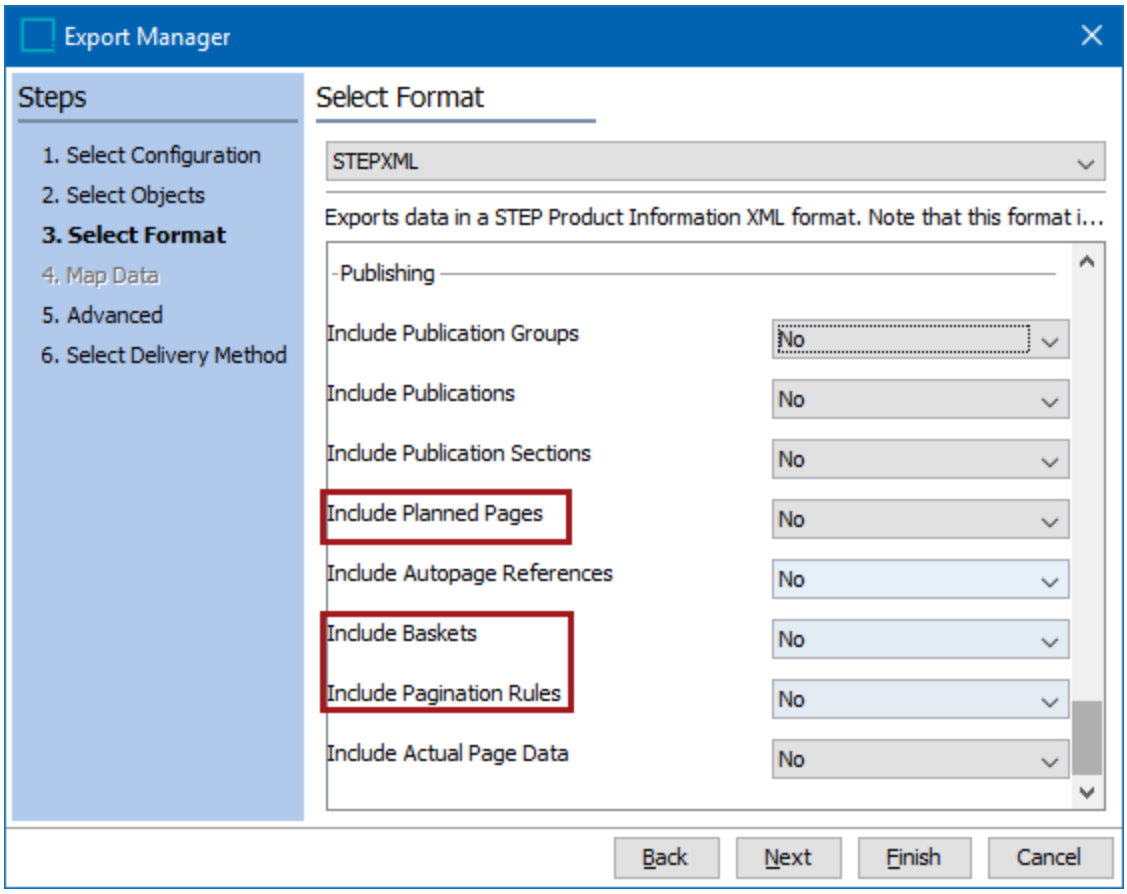
Instructions on how to import the STEPXML file itself are not detailed in this topic since the steps are the same as those for importing any other type of data into STEP using STEPXML. Flatplanner publications can be imported manually using the Import Manager or automatically using an inbound integration endpoint (IIEP).

For more information, see the **Import Manager** and **Inbound Integration Endpoints** sections of the **Data Exchange** documentation.

Exporting a Flatplanner Publication in STEPXML

The steps to export a Flatplanner publication in STEPXML are the same as those for exporting any other type of publication (standard 'drag and drop' or AutoPage), except a few additional Flatplanner-specific options are chosen when selecting the STEPXML outbound parameters.

1. To initiate the export, follow the initial steps outlined in **Exporting and Importing Publications in STEPXML** in the **STEP Publisher** documentation.
2. On the Select Format screen (step 3), after choosing STEPXML from the dropdown list, navigate to the publication options pictured below and choose the relevant publication information that you want to include in your export. All other default options can be left as-is (for example, 'Include Products = Minimum).



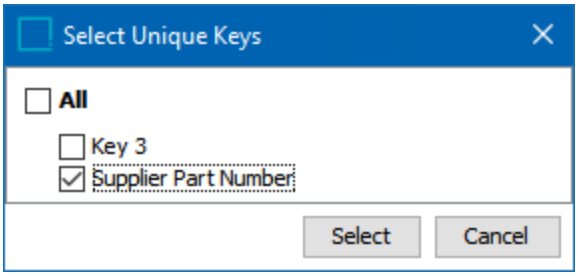
Note: The only options available for publication parameters are 'Yes' or 'No.' You may need to experiment with the combination of objects selected in the Select Objects step and the 'Yes' settings chosen in the Select Format step to ensure that you do not get too much or too little information in your export. For instance, if you export from a publication object and select 'Yes' for 'Include Publication Groups' but 'No' for 'Include Publications,' the export will include all publication groups that exist in your STEP system as well as the single publication selected, even though 'No' was selected for publications.

- The following parameters are relevant for **all** types of publications (standard STEP Publisher, Flatplanner, and AutoPage). Information on these parameters and the resulting tags in the STEPXML file are detailed in the **Exporting and Importing Publications in STEPXML** topic in the **STEP Publisher** documentation.
  - Include Publications
  - Include Publication Groups
  - Include Publication Sections
  - Include Actual Page Data: relevant if you have saved mounted DTP documents into your publication
- The following options are valid for **Flatplanner** publications.
  - Include Planned Pages

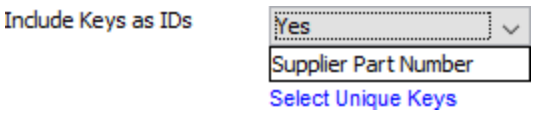
- Include Baskets
- Include Pagination Rules

3. Select Yes for Data Objects > **Include Keys as IDs** if you are using unique keys to identify objects linked to your baskets and/or Flatplanner page frames.

- To select the desired unique keys to use for this process, click the 'Select Unique Keys' link. The 'Select Unique Keys' dialog shows all active keys in the STEP system. Choose the key(s) to export, then click 'Select.'



- The selected Unique Keys will be shown in the Export Wizard.



4. Select Data Objects > **Include Workflow Tasks** if you are using a Flatplanner workflow. This parameter will return the ID of the user to whom the Flatplanner planned page is currently assigned. 'Include Planned Pages' must also be set to All to return this information. For more information on Flatplanner workflows, see the **Flatplanner Workflows** documentation.

5. The Map Data step is skipped as with any other STEPXML export, since data is not mapped in the STEPXML format.
6. The options in the Advanced step and the Select Delivery Method step are the same as those available for any other type of STEPXML export. See **Export Manager - Advanced** and **Export Manager - Select Delivery Method** in the **Export Manager** documentation for more information.

> **Note:** Though the **Select version used to resolve tables** option references publication versions, this setting is only relevant if the 'Include Tables' parameter is set to 'Yes' in the Select Objects step. This setting has no impact on publication-only exports. For more information, see the **Exporting Resolved Tables** topic in the **Tables** documentation.

File Example

The following STEPXML sample shows an export from a Flatplanner publication that contains two versions, a basket, pagination rules, one section with one planned page, and metadata attributes on the publication, section, and planned page objects.

Note: The content inside the <PaginationRules> tag in the below file sample has been abbreviated for illustration purposes, and as such is not valid for importing pagination rules in an actual publication import.

```
<STEP-ProductInformation ExportContext="Context1" ContextID="Context1"
WorkspaceID="Main" UseContextLocale="false">

<PublicationGroups>

  <PublicationGroup UserTypeID="Publication group root"
ParentID="Publication hierarchy root" ID="108198" UnitID="inches">

    <Name>Flatplanner Publications</Name>

      <Publication UserTypeID="Default publication type"
MasterDocumentID="109967" PagesPerSpread="2"
DefaultPageTemplateID="121163" DTPType="InDesign" ParentID="108198"
ID="128523">

        <Name>Acme Party Supplies</Name>

        <MetaData>

          <Value AttributeID="CatalogTheme">Acme Party Supplies</Value>

          <Value AttributeID="LastPageNumber" Derived="true">0</Value>

        </MetaData>

        <Version ContextID="Context2" WorkspaceID="Main" ID="204372">

          <Name>French FR</Name>

        </Version>

        <Version ContextID="Context1" WorkspaceID="Main" ID="128525">

          <Name>English US</Name>

        </Version>

        <Basket>

          <ProductBasketLink ProductID="121193"/>

          <ProductBasketLink ProductID="121180"/>

          <ProductBasketLink ProductID="121182"/>

          <ProductBasketLink ProductID="121183"/>

          <ProductBasketLink ProductID="121190"/>

          <ProductBasketLink ProductID="121218"/>

          <AssetBasketLink AssetID="121200"/>
```

```
          <ClassificationBasketLink
ClassificationID="IllustrationRoot"/>

        </Basket>

        <PaginationRules><!--Abbreviated--
>PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ1bGVzIFZlcnNpb24
9IjMiPgogIDxQYWdpbmF0aW9uUnVsZUdyb3VwPgogICAg=</PaginationRules>

        <PageTemplateLink PageTemplateID="2x2"/>

        <PageTemplateLink PageTemplateID="4x4"/>

        <PageTemplateLink PageTemplateID="3x3"/>

        <ProductTemplateLink ProductTemplateID="123670"/>

        <ProductTemplateLink ProductTemplateID="109964"/>

        <ProductTemplateLink ProductTemplateID="121385"/>

        <PublicationSection ID="128535" UserTypeID="Section">

          <Name>Party Favors</Name>

          <MetaData>

            <Value AttributeID="SectionTheme">Party Favors</Value>

            <Value AttributeID="FirstPageNumber"
Derived="true">4</Value>

            <Value AttributeID="LastPageNumber" Derived="true">9</Value>

          </MetaData>

          <PaginationRules><!--Abbreviated--
>PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ1bGVzIFZlcnNpb24
9IjIiPgogIDxQYWdpbmF0aW9uUnVsZUdyb3VwPgogICAg=</PaginationRules>

          <PlannedPage PageNumber="4" ID="128536" User="DTPUSER">

            <Name>Confetti</Name>

            <MetaData>

              <Value AttributeID="GetInheritedSectionValue"
Derived="true">Party Favors</Value>

              <Value AttributeID="GetInheritedPubGroupValue"
Derived="true">Acme Party Supplies - Since 1955</Value>

              <Value AttributeID="GetInheritedPublicationValue"
Derived="true">Acme Party Supplies</Value>

            </MetaData>

            <TemplateLayout TemplateID="2x2"/>

            <PageContents>

              <Frame ID="200" X="1.0" Y="0.75" Width="3.25"
Height="4.63" ZOrder="0" UnitID="inches">

                <ProductElement ProductID="109954">
```

```
                <TemplateLayout TemplateID="121385"/>
              </ProductElement>
            </Frame>
            <Frame ID="201" X="4.52" Y="0.75" Width="3.25"
Height="4.62" ZOrder="1" UnitID="inches">
              <ProductElement ProductID="109955">
                <TemplateLayout TemplateID="121385"/>
              </ProductElement>
            </Frame>
            <Frame ID="202" X="1.0" Y="5.62" Width="3.25"
Height="4.63" ZOrder="2" UnitID="inches">
              <ProductElement ProductID="109951">
                <TemplateLayout TemplateID="109964"/>
              </ProductElement>
            </Frame>
            <Frame ID="203" X="4.52" Y="5.62" Width="3.25"
Height="4.63" ZOrder="3" UnitID="inches">
              <ProductElement ProductID="109953">
                <TemplateLayout TemplateID="109964"/>
              </ProductElement>
            </Frame>
            <NoteFrame ID="1490212610420" X="1.79" Y="1.97"
Width="0.59" Height="0.59" ZOrder="4" UnitID="inches" Status="true">
              <NoteRecord Username="USER4" Timestamp="Wed Mar 22
15:56:50 EDT 2017">This is approved</NoteRecord>
            </NoteFrame>
          </PageContents>
        </PlannedPage>
      </PublicationSection>
    </Publication>
  </PublicationGroup>
</PublicationGroups>
</STEP-ProductInformation>
```

Flatplanner Information Included in the Export

The following sections explain the Flatplanner information included in the STEPXML file.

Include Publications

Full details on the information included in the <Publication> tag is provided in the **Exporting and Importing Publications in STEPXML** topic. Highlighted below are the two additional XML attributes included for Flatplanner publications.

```
<Publication UserTypeID="Default publication type" MasterDocumentID="109967" PagesPerSpread="2"
DefaultPageTemplateID="121163" DTPType="InDesign" ParentID="108198" ID="128523">
```

Tag	Description
<Publication>	Returns the following additional information for Flatplanner publications: • PagesPerSpread: The default number of pages used for spreads in the publication (valid values are 1 and 2) • DefaultPageTemplateID: The default page template used for planned pages in the publication

Include Planned Pages

```
<PlannedPage PageNumber="5" ID="128537">
  <Name>Confetti</Name>
  <MetaData>
    <Value AttributeID="GetInheritedSectionValue" Derived="true">Party Favors</Value>
    <Value AttributeID="GetInheritedPubGroupValue" Derived="true">Acme Party Supplies - Since 1955</Value>
    <Value AttributeID="GetInheritedPublicationValue" Derived="true">Acme Party Supplies</Value>
  </MetaData>
  <TemplateLayout TemplateID="Doc-dev page temp"/>
  <PageContents>
    <Frame ID="200" X="0.75" Y="0.75" Width="3.25" Height="4.63" ZOrder="0" UnitID="inches">
      <ProductElement ProductID="110049">
        <TemplateLayout TemplateID="109964"/>
      </ProductElement>
    </Frame>
    <Frame ID="201" X="4.25" Y="0.75" Width="3.25" Height="4.62" ZOrder="1" UnitID="inches">
      <ProductElement ProductID="110047">
        <TemplateLayout TemplateID="109964"/>
      </ProductElement>
    </Frame>
    <Frame ID="202" X="0.75" Y="5.62" Width="3.25" Height="4.63" ZOrder="2" UnitID="inches">
      <ClassificationElement ClassificationID="IllustrationRoot">
        <TemplateLayout TemplateID="109964"/>
      </ClassificationElement>
    </Frame>
    <Frame ID="201" X="4.38" Y="0.75" Width="3.28" Height="4.63" ZOrder="3" UnitID="inches">
      <AssetElement AssetID="121205"/>
    <NoteFrame ID="1490212610420" X="1.79" Y="1.97" Width="0.59" Height="0.59" ZOrder="4" UnitID="inches"
     Status="true">
      <NoteRecord Username="USER4" Timestamp="Wed Mar 22 15:56:50 EDT 2017">This is approved</NoteRecord>
    </NoteFrame>
  </PageContents>
</PlannedPage>
```

Tag	Description
<PlannedPage>	Parent tag for all planned page information included in the export. Returns the following information: • PageNumber: Page number of the planned page • ID: STEP ID of the planned page
<Name>	Returns the STEP name of the planned page
<MetaData>	Parent tag for metadata <Value> tags
<Value>	Returns the ID (AttributeID) and value of the description (metadata) attributes linked to the planned page. If an attribute is calculated, Derived="true."
<TemplateLayout>	Returns the STEP ID (TemplateID) of the page template used on the planned page
<PageContents>	Parent Tag for <Frame> tags
<Frame>	Returns the following information about the Flatplanner frame: • ID: STEP ID of the frame • X: The X coordinate of the frame on the planned page • Y: The Y coordinate of the frame on the planned page • Width: The width of the frame • Height: The height of the frame • ZOrder: The layering order of the frames The lower the number, the closer the frame is to the back • UnitID: STEP ID of the unit used in the frame measurements
<ProductElement>	Returns the ID (ProductID) of the product object linked to the frame
<ClassificationElement>	Returns the ID (ClassificationID) of the classification object linked to the frame
<AssetElement>	Returns the ID (AssetID) of the asset linked to the Flatplanner frame
<TemplateLayout>	When nested inside the <ProductElement> tag, returns the ID of the product template attached to the frame
<NoteFrame>	Returns the following information about the Flatplanner note:

Tag	Description

	• ID: STEP ID of the note
	• X: The X coordinate of the note on the planned page
	• Y: The Y coordinate of the note on the planned page
	• Width: The width of the note frame
	• Height: The height of the note frame
	• ZOrder: The layering order of the note frame. Will always have a higher number because it is layered on top of other frames
	• UnitID: STEP ID of the unit used in the note frame measurements
	• Status: Whether or not the note has been marked 'done.' Returns 'true' if the note has been marked done and 'false' if it has not.
	• <NoteRecord>: Nested tag that returns the content of the note as well as the following information:
	  ◦ Username: STEP ID of the user that created the note
	  ◦ Timestamp: Date and time that the note was created

Include Baskets

```
<Basket>
  <ProductBasketLink ProductID="121171"/>
  <ProductBasketLink ProductID="121178"/>
  <ProductBasketLink ProductID="121177"/>
  <ProductBasketLink ProductID="121184"/>
  <ProductBasketLink ProductID="121192"/>
  <ProductBasketLink ProductID="121218"/>
  <ProductBasketLink ProductID="121175"/>
  <ProductBasketLink ProductID="121176"/>
  <AssetBasketLink AssetID="121200"/>
  <AssetBasketLink AssetID="121205"/>
  <ProductBasketLink ProductID="121179"/>
  <ClassificationBasketLink ClassificationID="IllustrationRoot"/>
</Basket>
```

Tag	Description
<Basket>	Parent tag for objects contained in the Flatplanner basket
<ProductBasketLink>	Returns the STEP ID of the product object linked to the basket

Tag	Description
<AssetBasketLink>	Returns the STEP ID of the asset object linked to the basket
<ClassificationBasketLink>	Returns the STEP ID name of the classification object linked to the basket

Include Pagination Rules

<PaginationRules>
PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ1bGVzIFZlcnNpb249IjIiPgogID
xQYWdpbmF0aW9uUnVsZUdyb3VwPgogICAgPFBhZ2luYXRpb25SdWxlIFR5cGU9IlByb2R1Y3RUZW1wbGF0
ZUFjdGlvbiIgT3ZlcnJpZGRlbj0iMTA4MjAyLTEiIElkPSIxMDgyMDItMSI+CiAgICAgIDxDb25kaXRpb2
5zPgogICAgICAgIDxDb25kaXRpb24gSUQ9IkFsd2F5c0NvbmRpdGlvbiI+CiAgICAgICAgICA8UGFyYW1l
dGVycy8+CiAgICAgICAgPC9Db25kaXRpb24+CiAgICAgIDwvQ29uZGl0aW9ucz4KICAgICAgPEFjdGlvbn
M+CiAgICAgICAgPEFjdGlvbiBJRD0iUHJvZHVjdFRlbXBsYXRlQWN0aW9uIiBUeXBlPSJQcm9kdWN0VGVt
cGxhdGVBY3Rpb24iPgogICAgICAgICAgPFBhcmFtZXRlcnM+CiAgICAgICAgICAgIDxQYXJhbWV0ZXIgSU
Q9InRlbXBsYXRlSUQiPmNvbS5zdGliby5jb3J1LnBlcnNpc3RlbmNlLk5vZGVQTy0yMDg2NDAzPC9QYXJh
bWV0ZXI+CiAgICAgICAgICAgIDxQYXJhbWV0ZXIgSUQ9InRlbXBsYXRlVGl0bGUiPldlZGRpbmcgUHJvZC
BUZW1wPC9QYXJhbWV0ZXI+CiAgICAgICAgICA8L1BhcmFtZXRlcnM+CiAgICAgICAgICA8L1BBY3Rpb24+CiAg
ICAgIDwvQWN0aW9ucz4KICAgIDwvUGFnaW5hdGlvblJ1bGU+CiAgPC9QYWdpbmF0aW9uUnVsZXM+Cg
o8L1J1bGVzPg==</PaginationRules>

Pagination rules are included in encrypted strings in STEPXML files. As such, no additional information is available. However, pagination rule strings are consistent, and as such can be copied and pasted between files for reimport.

Include Workflow Tasks

<PlannedPage PageNumber="2" ID="108315" User="DTPUSER">

If Data Objects > Include Workflow Tasks is chosen as an outbound parameter in the Select Format step of the Export Manager, the STEP ID of the user to whom the planned page is currently assigned in the Flatplanner workflow will be returned within the <PlannedPage> tag.

Include Keys as IDs

When using Include Keys as IDs, the KeyValue tag will show the Key with the Key's ID on the frame it is mount to as well as if it's in the basket.

Frames

```
<Frame ID="201" X="4.38" Y="0.75" Width="3.28" Height="4.63" ZOrder="1" UnitID="inches">
  <ProductElement ProductID="">
    <KeyValue KeyID="SupplierPartNumber">SPN-20806</KeyValue>
    <TemplateLayout TemplateID="107821"/>
  </ProductElement>
</Frame>
```

Tag	Description
<ProductElement>	Normally, this tag returns the STEP ID of the linked product object (for example, ProductID="12345"); however, when a unique key is used instead of a STEP ID, no value is returned (ProductID="").
<AssetElement> (*Not pictured in above screenshot)*	Normally, this tag returns the STEP ID of the linked asset object (for example, AssetID="12345"); however, when a unique key is used instead of a STEP ID, no value is returned (AssetID="").
<ClassificationElement> (*Not pictured in above screenshot)*	Normally, this tag returns the STEP ID of the linked classification object (for example, ClassificationID="12345"); however, when a unique key is used instead of a STEP ID, no value is returned (ClassificationID="").
<KeyValue>	Returns the ID of the unique key being used to identify the linked object (KeyID) along with the key value, which is inside the tags for the object.

Baskets

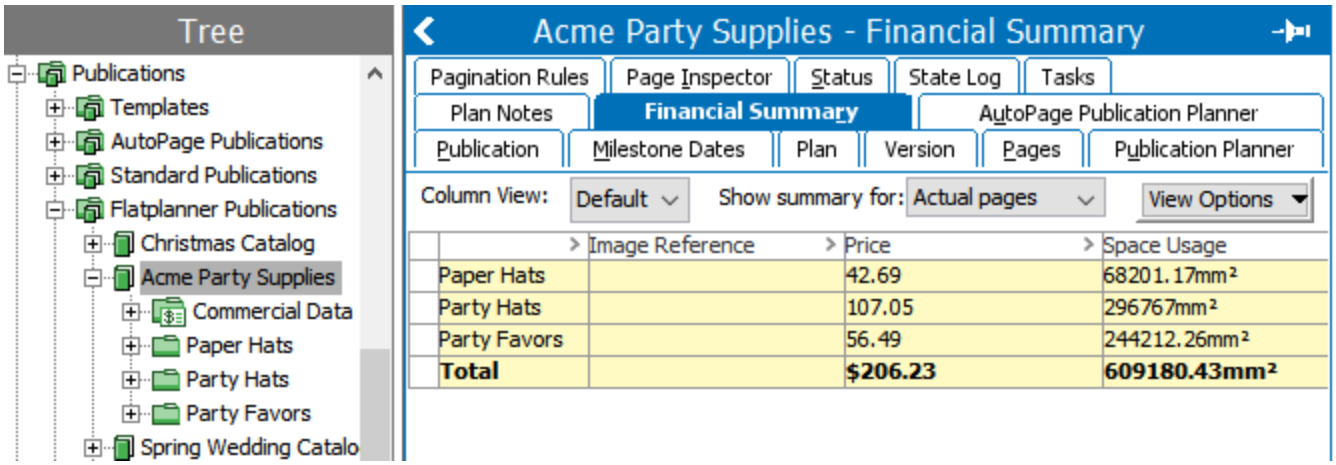
Tag	Description
<ProductBasketLink>	Normally, this tag returns the STEP ID of the linked product object (for example, ProductID="12345"); however, when a unique key is used instead of a STEP ID, no value is returned (ProductID="").
<AssetBasketLink> (*Not pictured in above screenshot)*	Normally, this tag returns the STEP ID of the linked asset object (for example, ProductID="12345"); however, when a unique key is used instead of a STEP ID, no value is returned (ProductID="").
<ClassificationBasketLink>	Normally, this tag returns the STEP ID of the linked classification object (for

Tag	Description
(*Not pictured in above screenshot)*	example, ClassificationID="12345"); however, when a unique key is used instead of a STEP ID, no value is returned (ClassificationID="").
<KeyValue>	Returns the ID of the unique key being used to identify the linked object (KeyID) along with the key value, which is inside the tags for the object.

Financial Summary and Financial Reports

The **Financial Summary** tab provides a general overview of what data will be included in an Excel-based **Financial Report**, which is pulled from the publication level or section level of a publication. Both the Financial Summary and the Financial Report contain information about the products, assets, and classifications that are contained either in the basket, on the actual pages, or on the planned pages that exist within the selected publication or section.

If viewing the Financial Summary from the publication level, each row contains section-level data. If viewed from the section level, each row contains page-level data. The below screenshot shows a Financial Summary as viewed from a publication with three sections.



The columns available in the **Financial Summary** are configured by editing the column **view**. The columns present in the Financial Summary will, in turn, be the columns present in the **Financial Report**. These views can include information such as pricing and space usage. If more than one view has been created, the relevant view can be selected when configuring the Financial Report, as explained in this topic. For more information on how to configure a view for the Financial Summary, see the **Views** section of this guide.

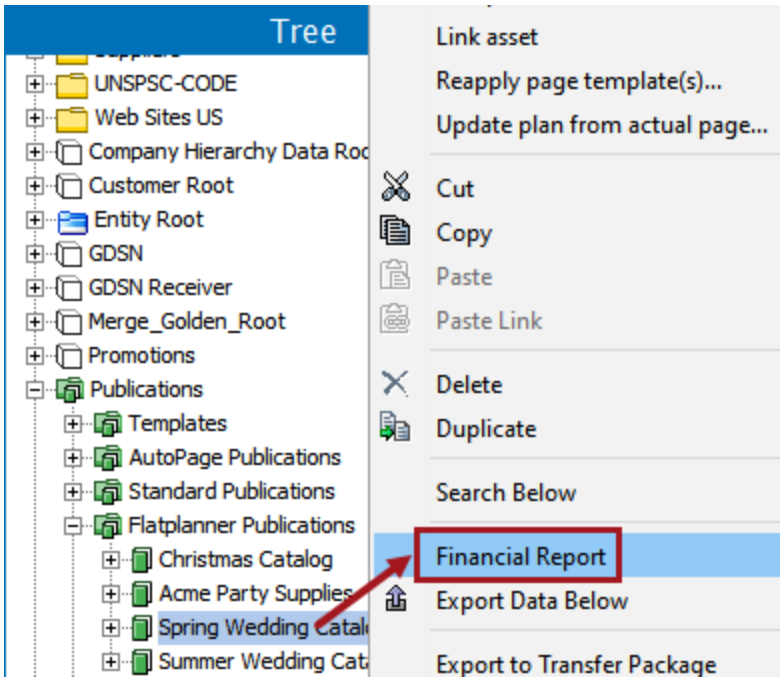
Note: All data may not display on the Financial Summary tab in the workbench. However, this data will be included in the extracted Financial Report.

To Create a Financial Report

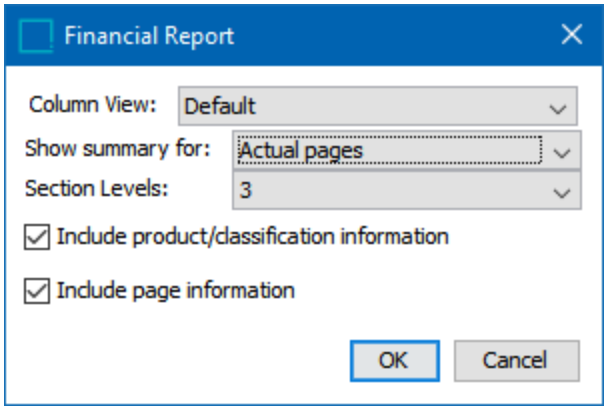
Follow these steps to create a Financial Report.

Note: If your publication has multiple versions, available data from all versions will be included in the Financial Report.

1. Right-click the relevant publication or section in the publication hierarchy, then choose **Financial Report**.



2. In the **Financial Report** dialog, the following configurations are available:



- **Column View:** Select the preferred column view. The available views correspond to the views that have been created for the Financial Summary.
- **Show summary for:** Three options are available—Basket, Planned pages, and Actual pages.
  - **Basket** provides the data from the objects contained in the basket for the selected publication or section.
  - **Actual pages** provides the data for DTP pages that have been saved back to STEP in the selected publication or section.
  - **Planned pages** provides the data for the planned pages present in the selected publication or section. If available, space usage data is extracted from the actual pages.

- **Section Levels:** Select the number of subsection levels to include in the report. For example, if you pull the report from a publication, the publication is level 1, sections are level 2, subsections are level 3, and so forth.
- Check **Include product/classification information** to include the names of products and classifications on the actual or planned pages saved to the publication or section.
- Check **Include page information** to view the financial data per page.

3. Click **OK** to complete the configuration of the report. The report will automatically open in Excel.

Space Usage in Financial Reports

Space usage provides information about how much space a product presentation takes up on a page. One use for this information is to analyze sales per square inch or millimeter for a product. This in turn helps merchandisers decide how much space to give a product in the next catalog or where to place the product.

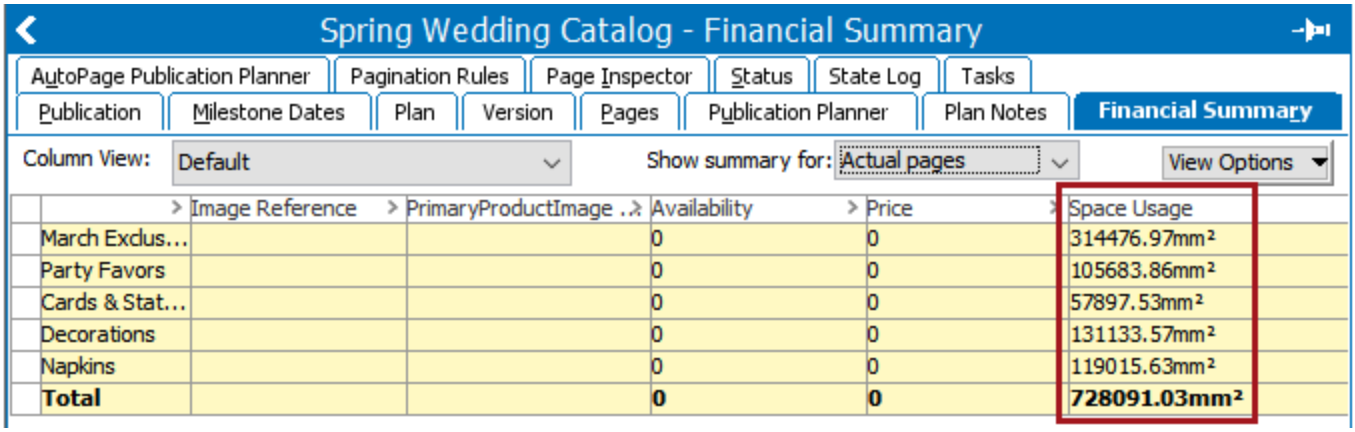


	Image Reference	PrimaryProductImage	Availability	Price	Space Usage
March Exclus...			0	0	314476.97mm²
Party Favors			0	0	105683.86mm²
Cards & Stat...			0	0	57897.53mm²
Decorations			0	0	131133.57mm²
Napkins			0	0	119015.63mm²
Total			**0**	**0**	**728091.03mm²**

This topic discusses the basic configurations for how to include space usage in a Flatplanner Financial Report. For more detailed information on how STEP calculates space usage overall, see the **Space Usage in STEP** topic in the **STEP Publisher** documentation.

Space Usage Setup

The standard space usage setup calculates the space usage for a product presentation based on the raw data on a page. Unless specified in System Settings, it does not include the white space of the product presentation in the calculation.

For example, if you increase the font size of a product title, the space usage increases. However, if you increase the size of a frame without increasing the size of the content of the space, the space usage does not increase.

To include space usage information in a Financial Report:

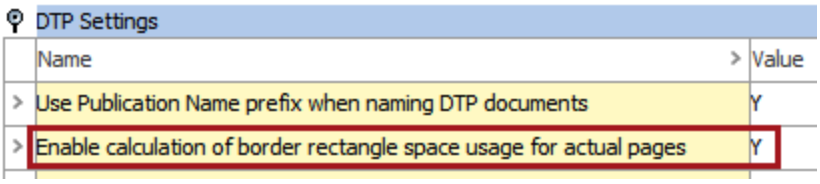
- Verify that space usage handles the white space of a product presentation the way you want it to, i.e., determine if you want white space of product frames included in the space usage calculations.
- Add a Space Usage column to the Financial Summary view.

Include White Space in Space Usage Calculations

To include the white space of a product presentation in the calculation, follow these steps.

1. In System Setup, click **Users and Groups**.
2. On the System Settings tab, locate the **DTP Settings** area.

3. Click the value field of **Enable calculation of border rectangle space usage for actual page**, then select **Y**.



The space usage now includes the white space of a product presentation from the upper left corner of the product presentation to the lower right corner.

Add Space Usage to the Financial Summary View

If you want a financial report to include space usage information, you have to add the column Space Usage to the Financial Summary view.

1. On the Financial Summary tab of your publication, section, or subsection, click **View Options** in the upper right corner of the interface, then choose **Edit**.
2. Follow the instructions in the **Editing Views** topic of this guide to add the **Space Usage** element to the view. If you are editing a public view, a private view may need to be created.

Flatplanner Workflows

A Flatplanner workflow links together all of the tasks involved in the process of planning and approving the pages that comprise Flatplanner publications.

Unlike other STEP workflows, the Flatplanner workflow is integrated with **InDesign** through the **STEP Publisher** plugin. This integration allows DTP (desktop publishing) users (also referred to as designers) to accept Flatplanner workflow tasks from within InDesign without ever having to log in to the workbench.

Flatplanner workflows typically involve tasks such as planning pages, approving planned pages, routing planned pages to designers who carry out layout tasks in InDesign, and approving finalized pages. The object type that moves through a Flatplanner workflow is the **Planned Page**.

Configuring a Flatplanner Workflow

Instructions on how to configure specific elements of a Flatplanner workflow that are unique to the Flatplanner workflow are covered in the **Configuring Flatplanner Workflows** documentation. These unique elements include the configuration of the **STEP Tasks** dialogs in InDesign as well as the options available in the **Publication Planner**.

Sample Flatplanner Workflow

A sample Flatplanner workflow, which details the tasks involved in accepting tasks, planning a page, and approving a page, is detailed in the **Flatplanner Workflow Example** documentation.

As with any STEP workflow, Flatplanner workflows are customized according to specific customer requirements. This is merely a 'how to' example that serves as a walkthrough of a simple Flatplanner workflow.

Publication and Section Object Workflows

Workflows for publication and publication section objects may also be implemented in addition to a Flatplanner workflow.

Publication and section workflows enable the assignment of tasks such as:

- Importing prices
- Publication planning, where information such as dates and styles are defined
- Linking of products to sections
- Population of metadata attributes on publication and section objects

Unlike Flatplanner page spread workflows (which require use of the Publication Planner), publication and section workflows function like standard STEP workflows used for classifications, products, and assets. Also, a Flatplanner license is not required to use a publication or section workflow. However, even with a Flatplanner license, DTP users cannot pick up tasks related to publication and section objects in InDesign.

Note: Publication objects and section objects cannot share the same workflow. Each object type must have its own standalone workflow.

Publication and section workflows are created by the same methods as any other workflow in STEP. For instructions, see the **Getting Started with STEP Workflows** section of the **STEP Workflows** documentation.

Configuring Flatplanner Workflows

A Flatplanner workflow is built and configured like any other workflow in STEP, though it has a few features that are unique to it, such as:

- The ability to send planned pages through a workflow
- The ability to stop and start workflows from the Publication Planner
- The ability to color-code workflow states in the Publication Planner
- The ability to set milestone / 'traffic light' colors in the Publication Planner, to give users a visual indicator of how far along a planned page is in a particular state. See the **Publication Milestones** topic for more information.
- The ability for desktop publishing (DTP) users to pick up workflow tasks in InDesign when changes need to be made on actual pages
- Automated generation of InDesign pages using a background process, enabling DTP users to pick up mounted InDesign pages in InDesign as part of the Flatplanner workflow process without having to manually mount the pages themselves

The available options for a Flatplanner workflow will vary depending on how the workflow has been configured and will vary from user to user.

General workflow topics such as configuring workflow states, transitions, views, etc., are not covered in this topic, as they are not unique to the Flatplanner workflow.

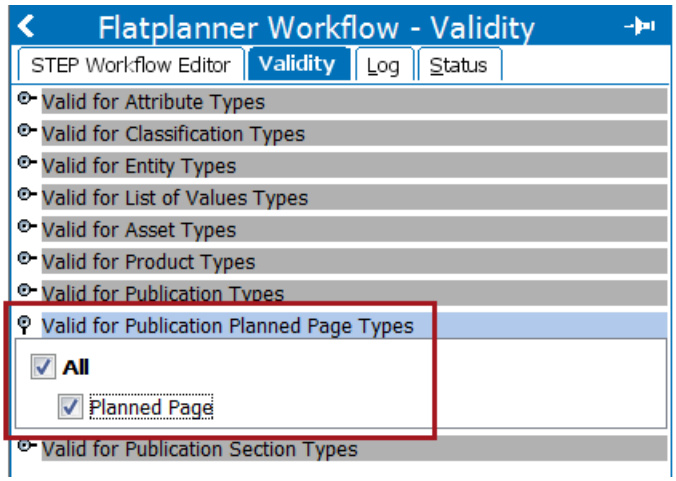
Note: If you are using a Flatplanner workflow for the first time on a STEP system that is version 8.0 or higher, the following property must be added to the sharedconfig.properties file on your application server: `Workflow.FlatPlanner.SelfContained=true`. For users who have upgraded to STEP 8.0 but need to continue using an existing (pre-STEP 8.0) Flatplanner workflow, this property should either be omitted from the sharedconfig.properties file altogether or set to **false**. Contact Stibo Systems if you need assistance with this configuration.

Creating the Workflow

A Flatplanner workflow is created by the same method as any other workflow in STEP. For instructions, see the **Getting Started with STEP Workflows** section of the **STEP Workflows** documentation.

Flatplanner workflows must be made valid for the **Planned Page** object type.

Note: Only one object type is available in STEP for Planned Pages. Additional Planned Page object types cannot be created.



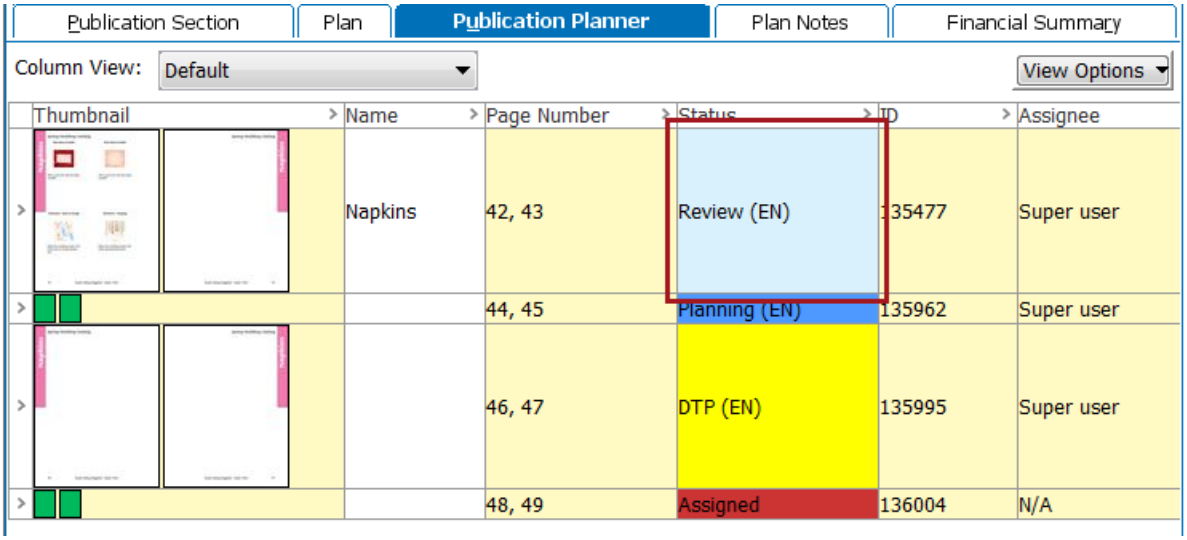
In addition, at least one state must be configured for use by DTP users in InDesign. See the **Configuring DTP Task Views for InDesign** topic for more information.

Configuring Status / Workflow State Colors

In Flatplanner workflows, workflow states can be configured with color coding that displays in the Publication Planner, on planned pages, and on actual pages. This color coding gives workbench users a quick way to obtain an overview of which states each planned page is currently in.

The following screenshot shows how these state colors display in the **Publication Planner**.

Note: If the **Status** column is not visible in your Publication Planner view, it must be added. See the **Configuring the Publication Planner Column View** topic for more information.



Each status may be assigned a custom color. These status colors are configured by adding an RGB value to an On Entry business action for each state that should receive a color code. This is achieved by setting the value of a workflow variable called STATE_COLOR in the following business rule:

```
node.getWorkflowInstance(workflow).setSimpleVariable("STATE_COLOR",
"217,241,253");
```

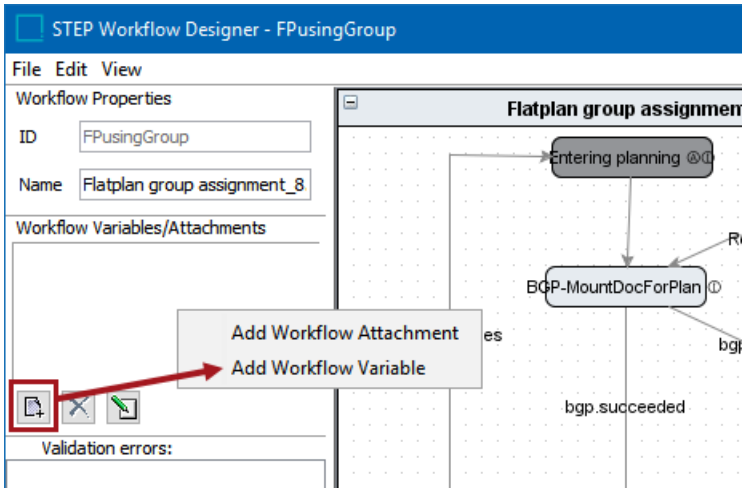
In this example, 217,241,253 is the RGB value of the light blue **Review** state shown in the previous screenshot.

Note: The **Assigned** status cannot be assigned a color by this method, since it is not a workflow state. If you require a different color for the Assigned status, contact Stibo Systems.

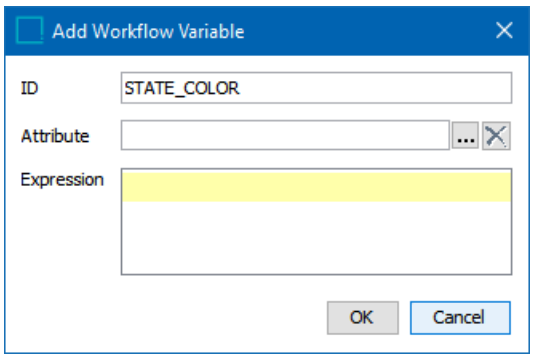
Configuring State Color Business Actions

To configure the business rules that set status colors, follow these steps:

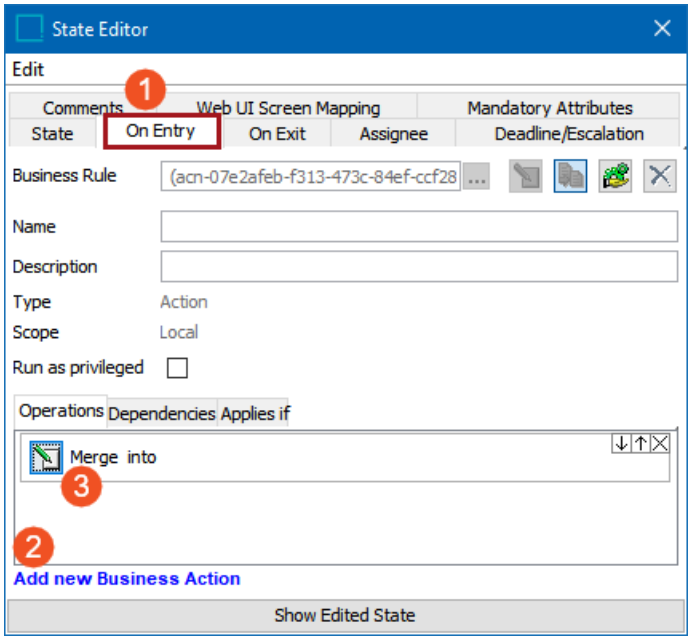
1. Locate the Flatplanner workflow in System Setup that you would like to edit, then right-click and select **Edit STEP Workflow**. The **STEP Workflow Designer** displays.
2. In the **Workflow Variables/Attachments** area, click the **Add** icon and select **Add Workflow Variable**.



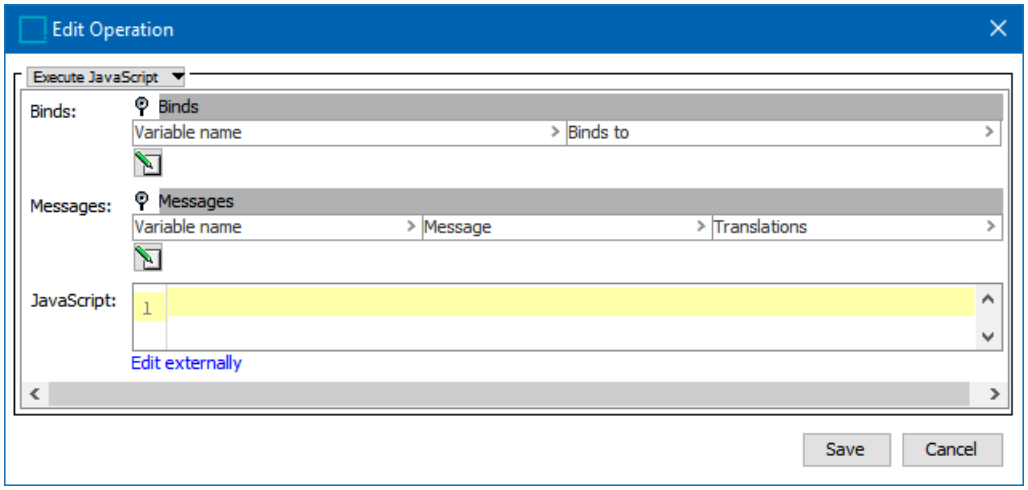
3. In the 'Add Workflow Variable' dialog, enter the ID **STATE_COLOR**, then click **OK**. The variable is created.



4. Next, in the **STEP Workflow Designer**, double click on the workflow state for which you would like to specify a state color. The **State Editor** dialog displays.
5. In the State Editor, navigate to the **On Entry** tab and click **Add new Business Action**, then click on the **Edit Operation** icon on the **Operations** tab.

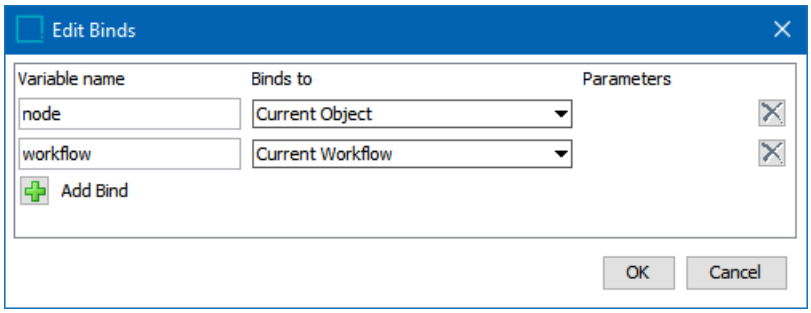


6. In the **Edit Operation** dialog that displays, click the dropdown list in the upper left-hand corner and select **Execute JavaScript**. The Execute JavaScript options now display in the Edit Operation dialog.



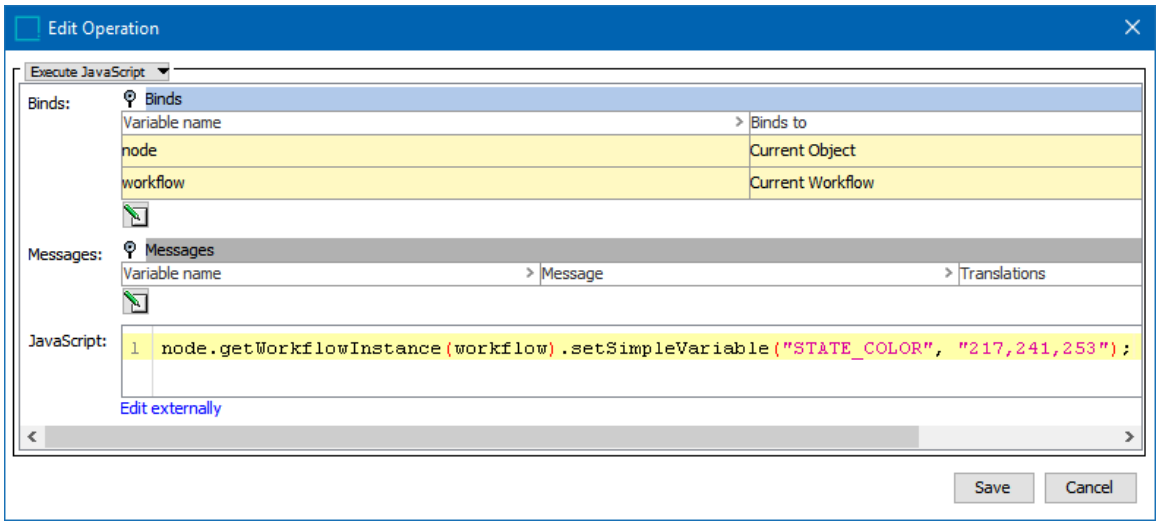
7. Click the edit button ( ) under the **Binds** flipper. The **Edit Binds** dialog displays.
8. Click the green plus sign **Add Bind** button ( ). Type **node** in the **Variable name** field, then select **Current Object** from the **Binds to** dropdown list.

9. Click the green plus sign **Add Bind** button ( ) again. Type **workflow** in the **Variable name** field, then select Workflow > **Current Workflow** from the **Binds to** dropdown list.
10. Your **Edit Binds** dialog should now look like the following screenshot. When finished, click **OK** to close the dialog.



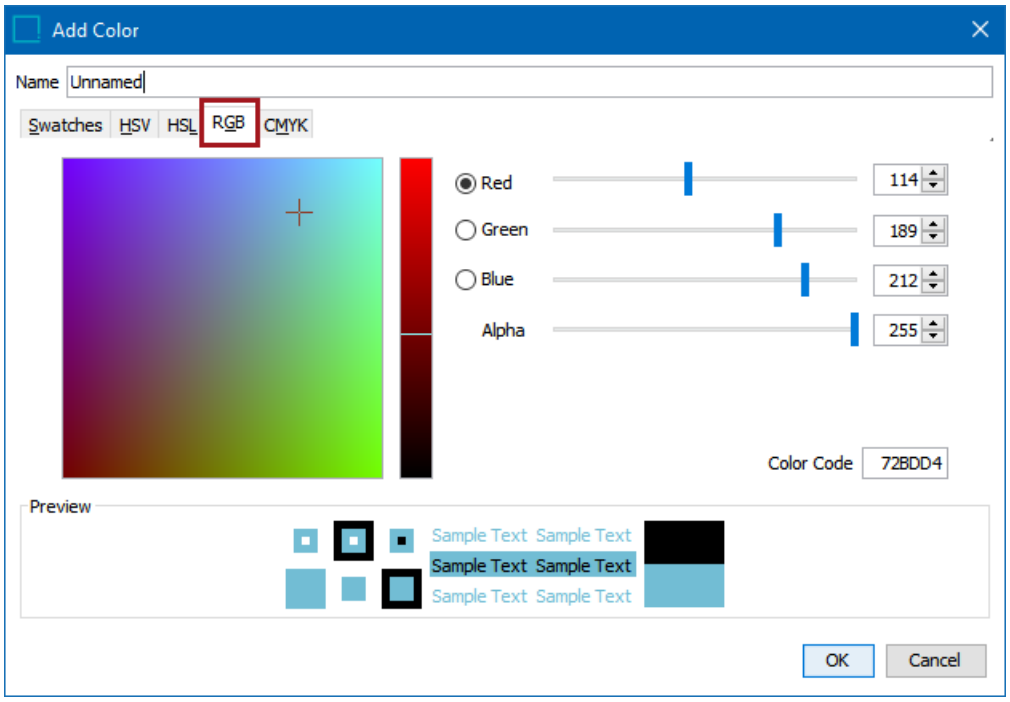
11. In the **JavaScript** field, copy and paste the following code:

```
node.getWorkflowInstance(workflow).setSimpleVariable("STATE_COLOR", "217,241,253");
```



12. To customize the RGB value, replace the three numeric values with the RGB values of the preferred color.
13. Click **Save** to close the Edit Operation dialog. The business action is configured.

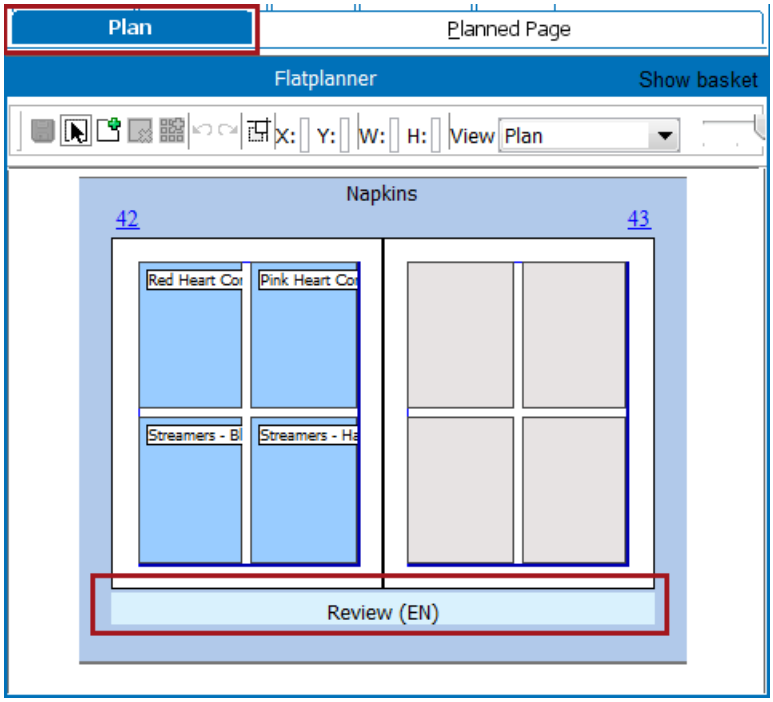
Note: Though RGB values must be entered manually in the JavaScript string to configure state / status colors, an **AddColor** dialog exists in STEP that can be used as a guide when deciding on a color. This guide displays the numeric values for RGB colors, which can be copied and pasted into the relevant area of the JavaScript string. For information on how to access the **Add Color** dialog, see the **Defining Table Colors in STEP** section of the **Tables** documentation.



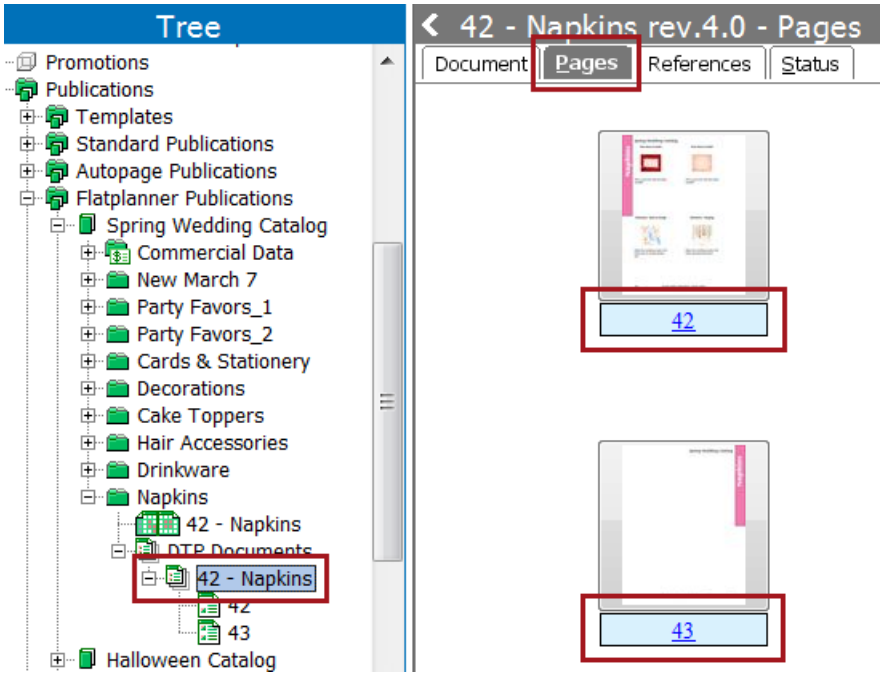
Viewing State Colors in Locations Other Than the Publication Planner

State colors for Flatplanner workflows also appear in the workbench in the following locations:

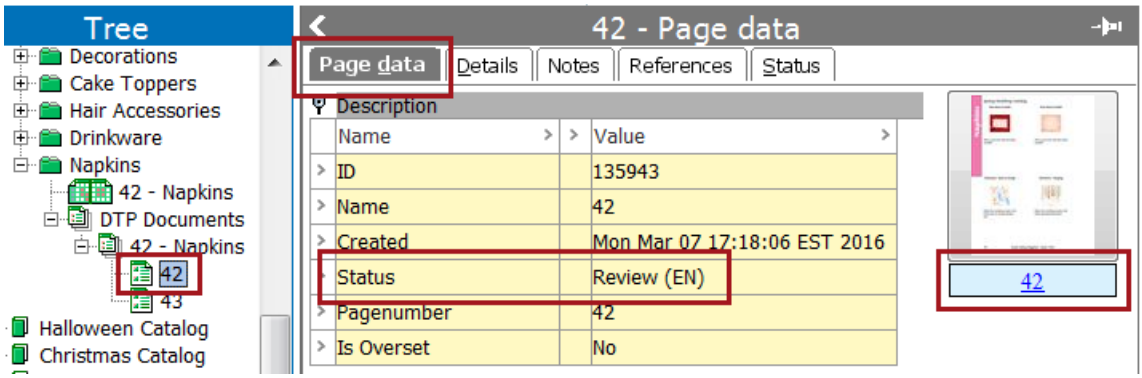
- Below Planned Pages on the **Plan** tab:



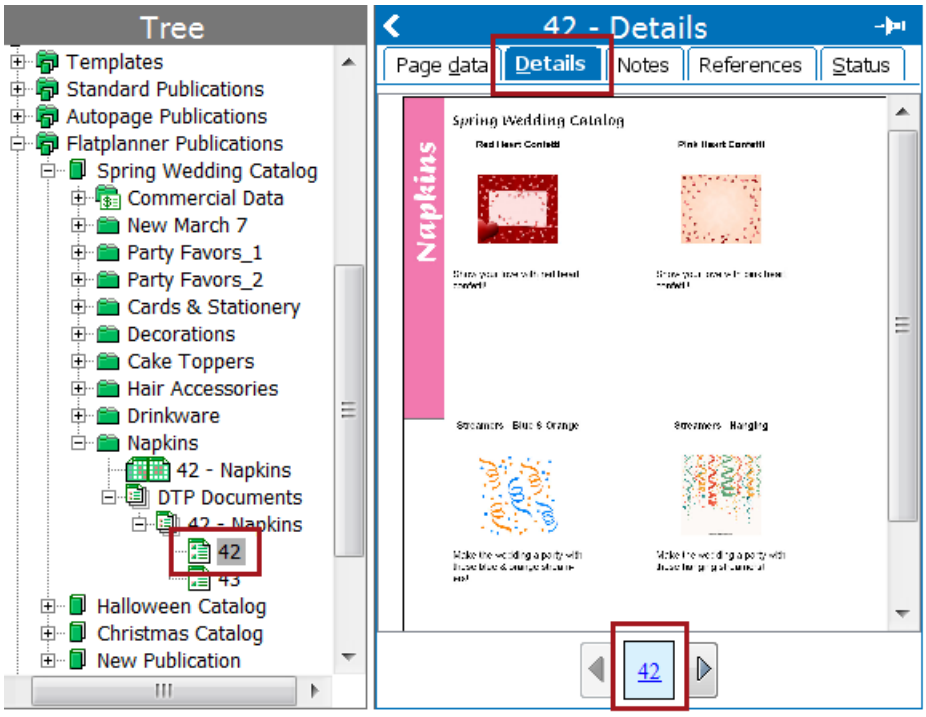
- Below **actual pages** on the **Pages** tab:



- Below **actual pages** on the **Page data** tab:



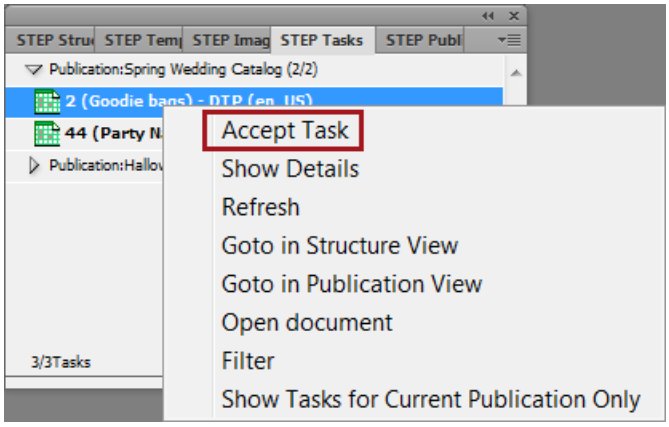
- Below actual pages on the **Details** tab:


Tree
Templates
Standard Publications
Autopage Publications
Flatplanner Publications
Spring Wedding Catalog
Commercial Data
New March 7
Party Favors_1
Party Favors_2
Cards & Stationery
Decorations
Cake Toppers
Hair Accessories
Drinkware
Napkins
42 - Napkins
DTP Documents
42 - Napkins
42
43
Halloween Catalog
Christmas Catalog
New Publication
42 - Details
Page data
Details
Notes
References
Status
Napkins
Spring Wedding Catalog
42

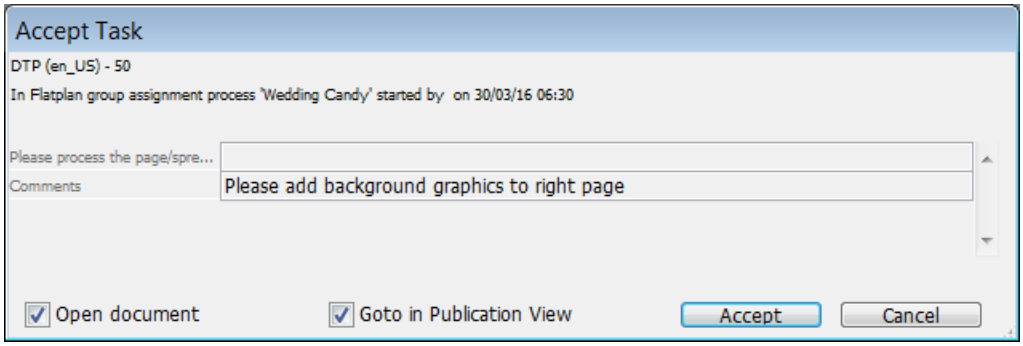
Configuring DTP Task Views for InDesign

DTP users accept STEP Workflow tasks in InDesign from the **STEP Tasks** panel. This panel is also where DTP users return these tasks—in the form of actual pages—back to STEP after completing work on the page.

Note: This topic describes the functionality of the STEP Tasks panel in the context of how to use it with a Flatplanner workflow. For a detailed explanation of all menu items on the panel, see the **STEP Tasks** topic in the **STEP Publisher** documentation.



When DTP users click Accept Task from the STEP Tasks panel, an **Accept Task** dialog displays.

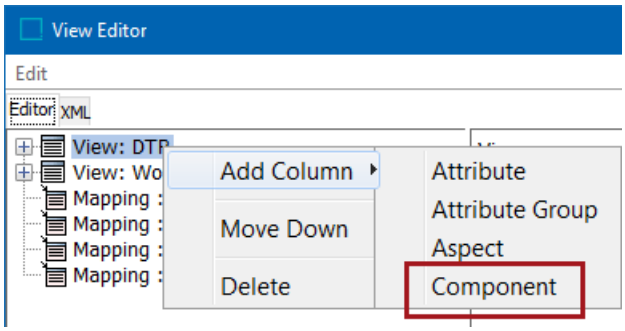


Enabling the Accept Task Action in the STEP Tasks Panel

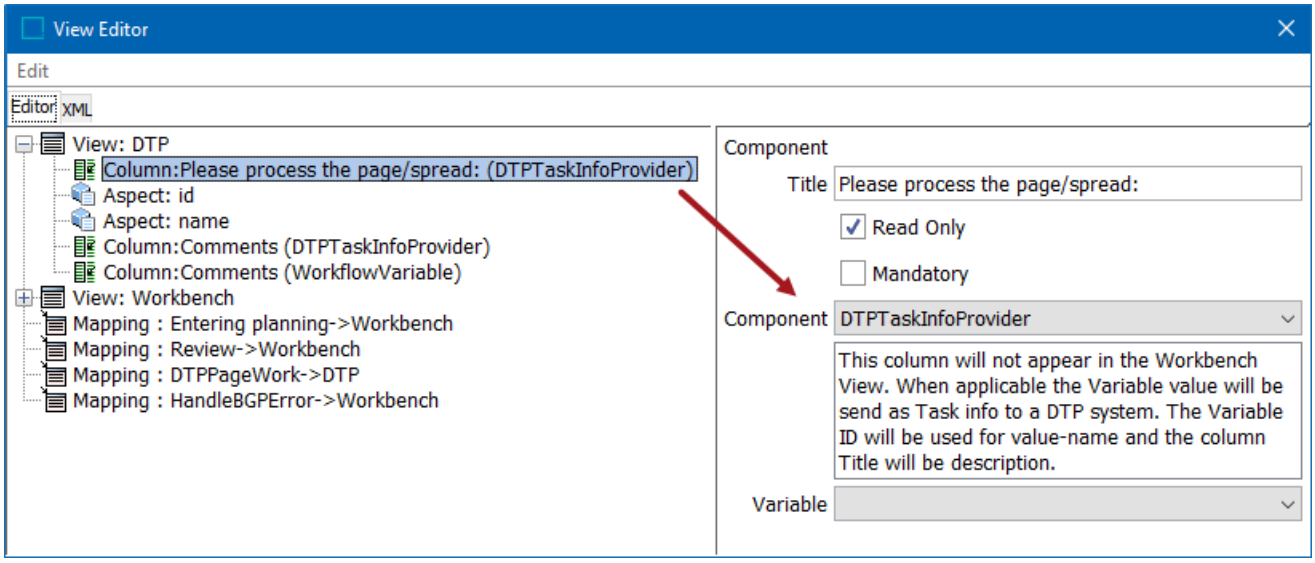
To enable the **Accept Task** action in the **STEP Tasks** panel in InDesign, at least one **Component** column using the **DTPTaskInfoProvider** component must be added to the **View** for the DTP workflow state. This is configured as follows:

1. In **System Setup**, navigate to the desired Flatplanner workflow, then right-click and select **Edit STEP Workflow**. The **STEP Workflow Designer** displays.

2. In the STEP Workflow Designer, navigate to Edit **> Edit Workbench Views and Mappings**. The **View Editor** displays.
3. If no views or mappings are already present, create them according to the steps outlined in the **Views and Mappings for Workflows** section of the **STEP Workflows** documentation.
4. Right-click the **View** for the DTP workflow state, then select Add Column > **Component**.



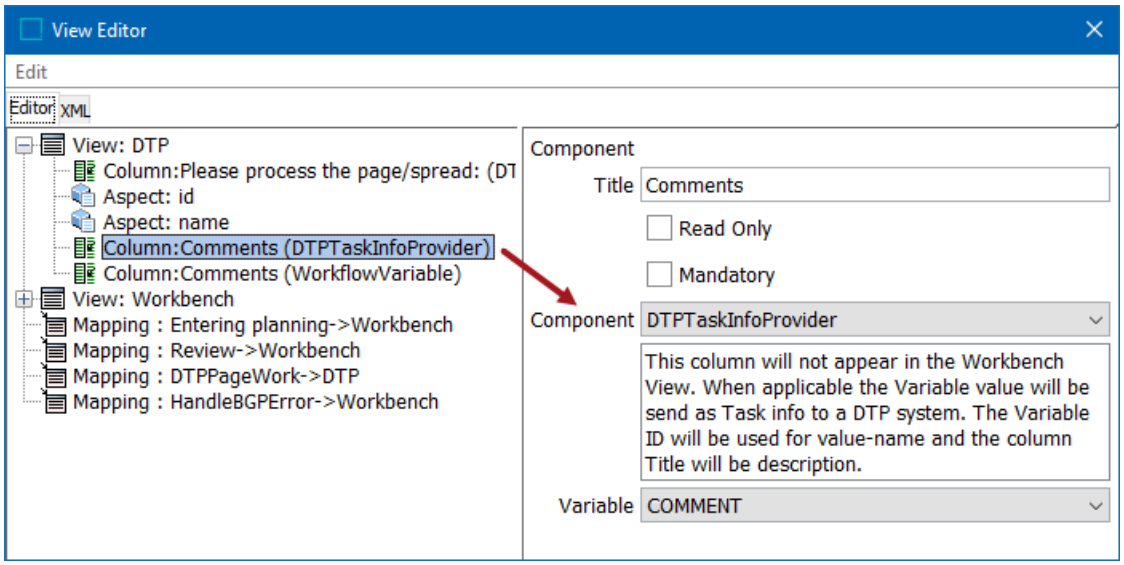
5. Select **DTPTaskInfoProvider** from the Component dropdown list, then insert the desired text (which you would like the DTP operator to see) in the **Title** field. The following screenshot shows the standard configuration for the required DTPTaskInfoProvider component column.



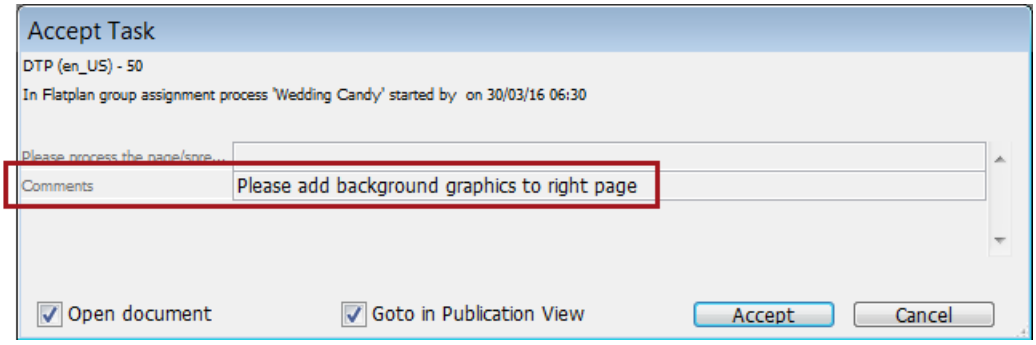
Adding Additional Fields to the Accept Task Dialog

To add additional fields to the **Accept Task** dialog in InDesign, additional columns using the **DTPTaskInfoProvider** component may be added to the View in conjunction with workflow **Variables**.

The following example shows the column configuration for a Comments field. It uses the **DTPTaskInfoProvider** component in conjunction with a workflow variable called COMMENT:

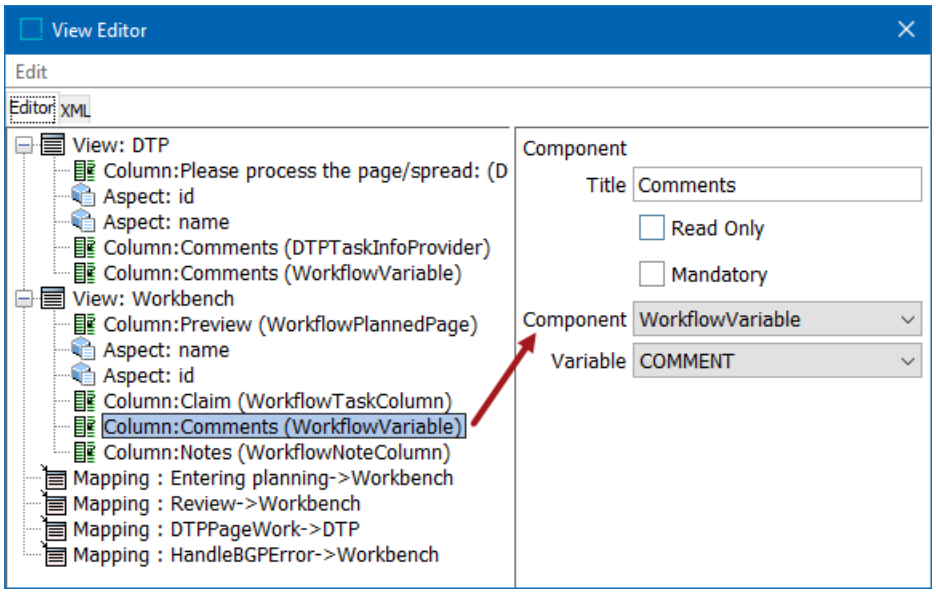


The Comments field appears in the Accept Task dialog in InDesign:

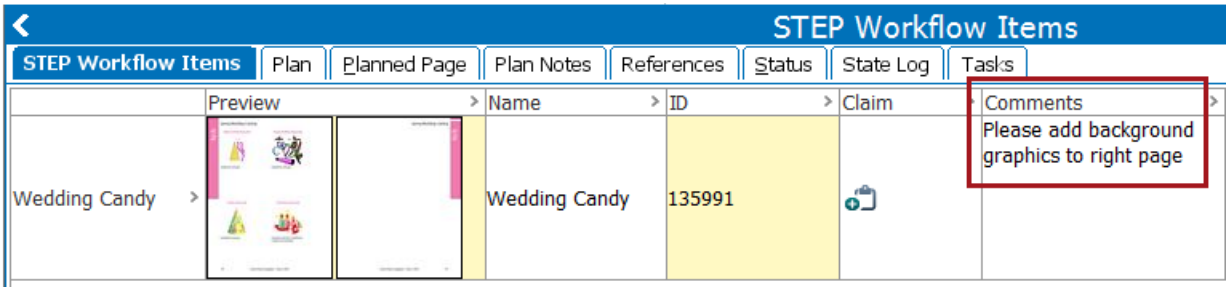


This same Comments field can also be viewed in the workbench and populated with content before DTP users pick up the task in InDesign. This is accomplished by adding a **Component** column to the **View** of another workflow state that is viewable in the workbench. This should be a state that the Planned Page passes through *before* it is routed to InDesign.

In this example, the component is **WorkflowVariable** and the variable is COMMENT (the same variable used to generate the Comments field in the **Accept Task** dialog). The following screenshot shows this configuration for a sample View called 'Workbench':



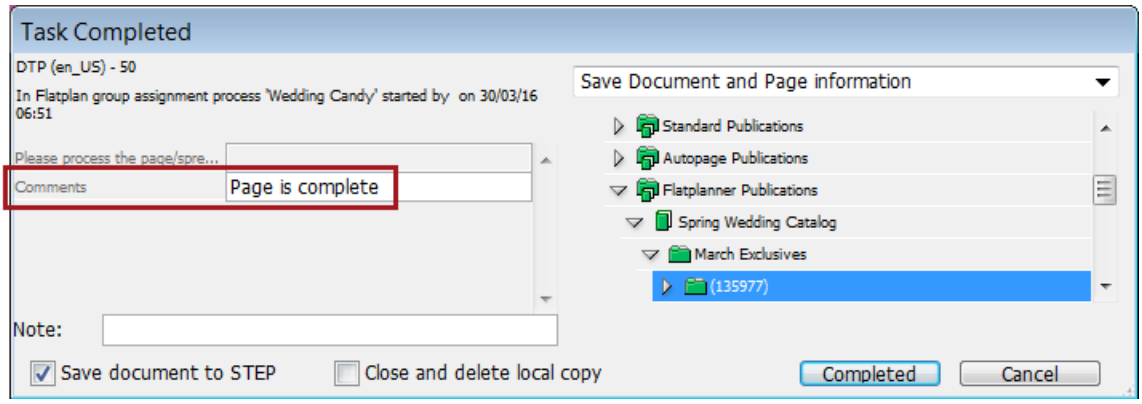
This is how this column looks in the workbench:

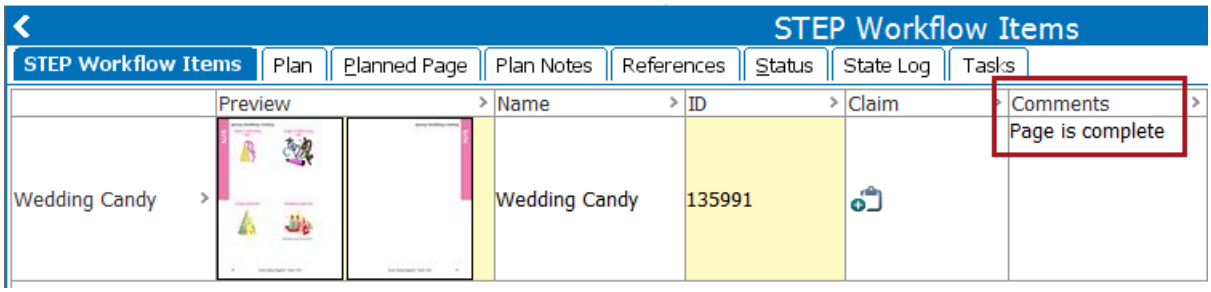


Fields in the Task Completed Dialog

Any columns added to the **Accept Task** dialog in InDesign using the DTPTaskInfoProvider component also appear in the **Task Completed** dialog (also accessed from the **STEP Tasks** panel in InDesign). The Task Completed dialog displays when DTP users have completed working with the page in InDesign and return it to STEP.

The following screenshot shows how the Comments 'column' looks in the **Task Completed** dialog. DTP users may overwrite the incoming comments, which will display in the workbench when the page is returned to STEP:

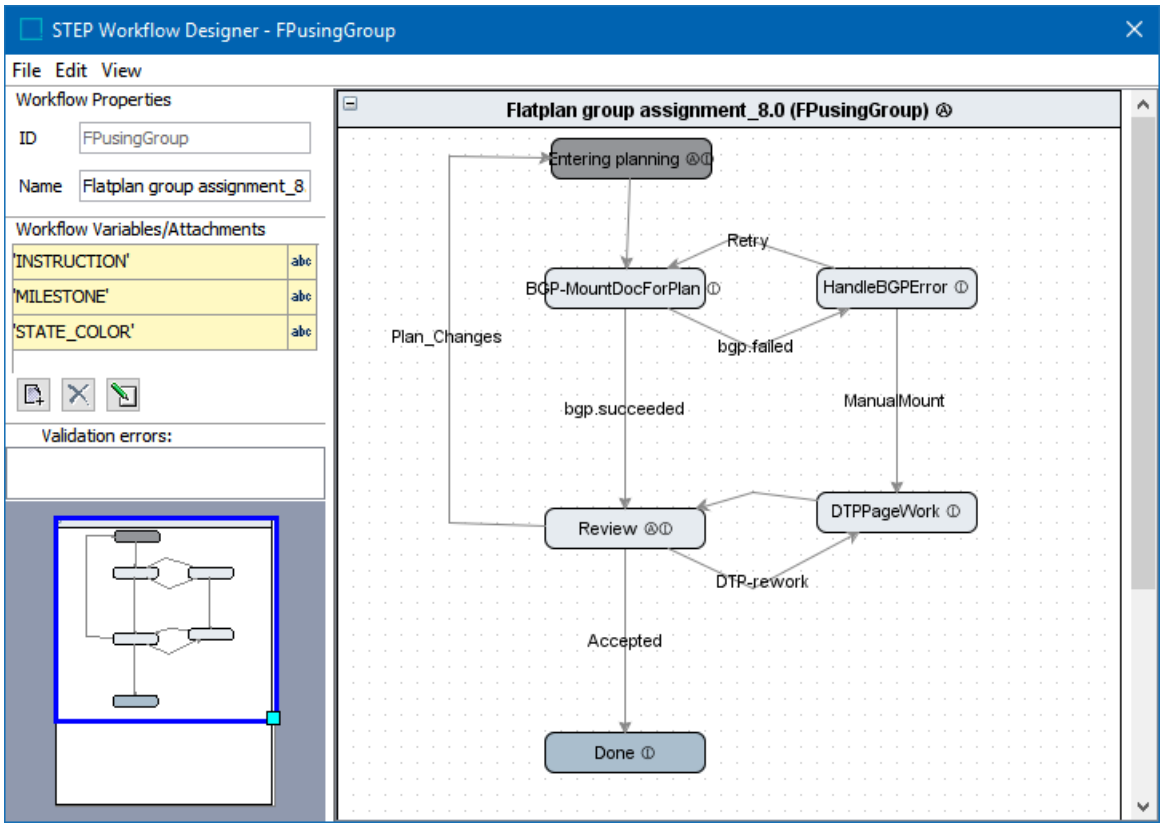

Task Completed
DTP (en_US) - 50
In Flatplan group assignment process 'Wedding Candy' started by on 30/03/16 06:51
Please process the page/spre...
Comments
Page is complete
Note:
Save document to STEP
Close and delete local copy
Save Document and Page information
Standard Publications
Autopage Publications
Flatplanner Publications
Spring Wedding Catalog
March Exclusives
(135977)
Completed
Cancel


STEP Workflow Items
STEP Workflow Items
Plan
Planned Page
Plan Notes
References
Status
State Log
Tasks
Preview
Name
ID
Claim
Comments
Page is complete
Wedding Candy
Wedding Candy
135991

Flatplanner Workflow Example

This topic serves as a 'how-to' primer for working with a **sample** Flatplanner workflow and illustrates some common tasks that are performed as a Planned Page moves through the various workflow states. The example is simple but is examined on a state-by-state basis to provide you with a working knowledge of how a Flatplanner workflow actually functions, not just how to configure one.

The following screenshot shows a very simple Flatplanner workflow configuration in the STEP Workflow Designer. This is the example used in this tutorial.



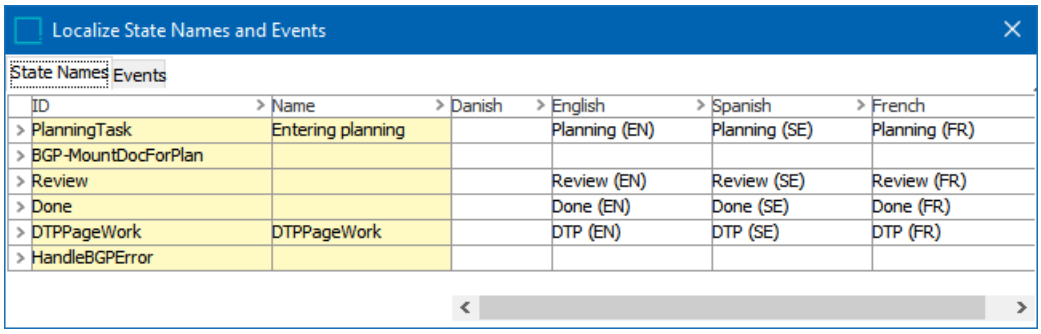
This topic does not explain how to create or configure a Flatplanner workflow and assumes the following:

- The Flatplanner workflow is already created in STEP. If not, refer to the **Configuring Flatplanner Workflows** topic for more information.
- The planned page has already been initiated into the workflow. If not, refer to the **Starting and Stopping Flatplanner Workflows** topic for more information.

Note: As with any STEP Workflow, individual user requirements will determine the exact configurations. This sample merely illustrates some standard uses of Flatplanner workflows in general.

Planning the Page

The first state of the example workflow is named **Entering Planning**. The name that displays on the **STEP Workflow** tab under **Tasks** is determined by locale. In this instance, the Entering Planning state is named **Planning (EN)** since this example uses an English version of STEP.



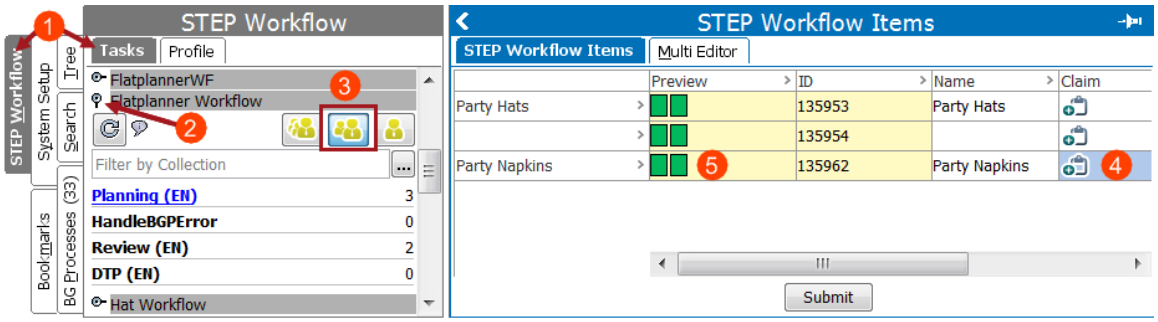
ID	Name	Danish	English	Spanish	French
PlanningTask	Entering planning		Planning (EN)	Planning (SE)	Planning (FR)
BGP-MountDocForPlan					
Review			Review (EN)	Review (SE)	Review (FR)
Done			Done (EN)	Done (SE)	Done (FR)
DTPPageWork	DTPPageWork		DTP (EN)	DTP (SE)	DTP (FR)
HandleBGPError					

The typical task performed during this state is for a workbench user—for example, a merchandiser who determines product placement in catalogs—to plan the Flatplan pages. The central task of planning a page involves linking products into frames on a Flatplanner page spread (Planned Page). Page planning can be done without using a Flatplanner workflow, but the workflow enables you to receive your page planning assignments as **tasks**.

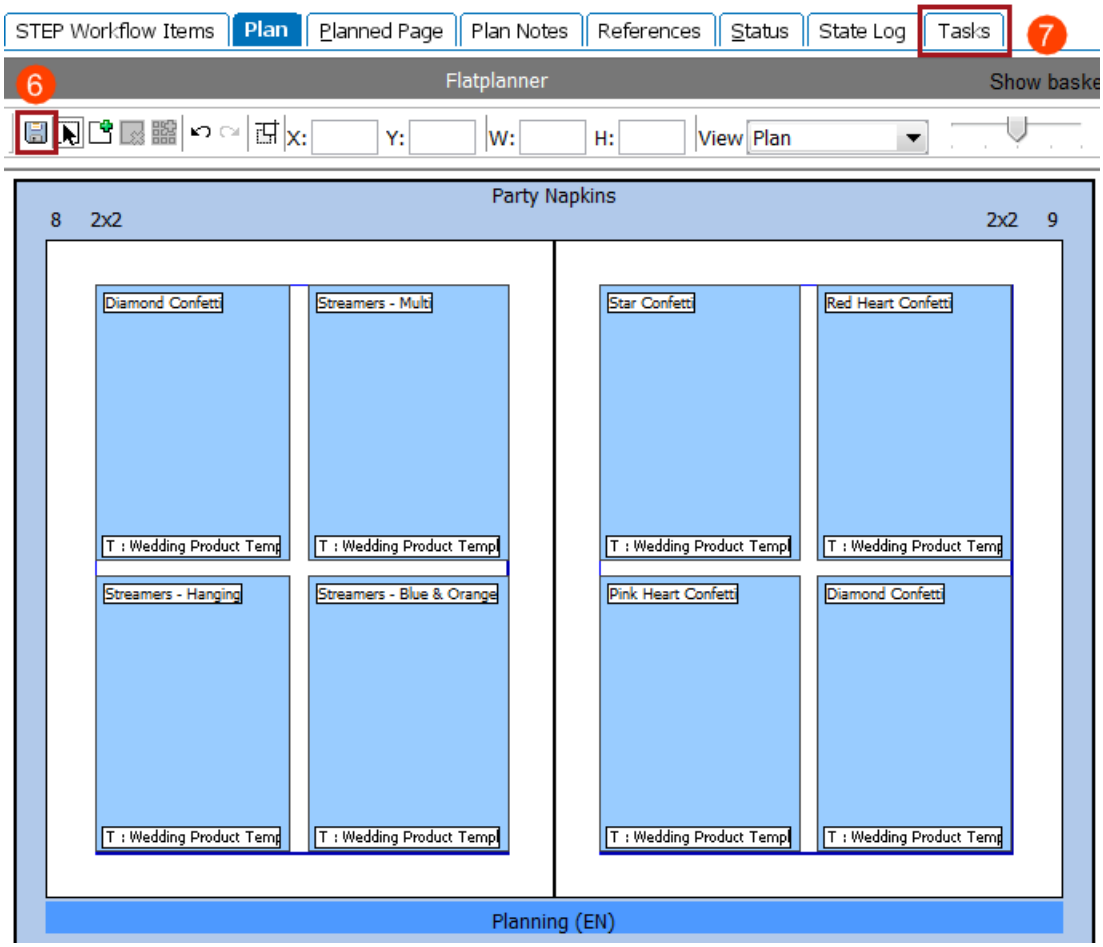
Claim and Submit a Planned Page

If you are a page planning user, follow these steps to plan a page in conjunction with this sample Flatplanner workflow.

1. To determine if you have been assigned a page planning task, click the **STEP Workflow** tab, and then click the **Tasks** tab.
2. Navigate to the relevant Flatplanner workflow, then click the **Flipper** icon to view the tasks for the workflow.
3. In the Tasks list, click the first state, **Planning (EN),** to view the pages that are in the Planning state. Unless the task has been assigned directly to you, you will need to click on the 'Show all items' ( ) or 'Show all items assigned to me or any group I am a member of' icon (, outlined below in red frame) to view all available tasks to your User Group.
4. To claim a task and make it unavailable to other users in your User Group, click on the **Claim** icon.
5. In the **Preview** column, click on the page spread that you would like to plan.



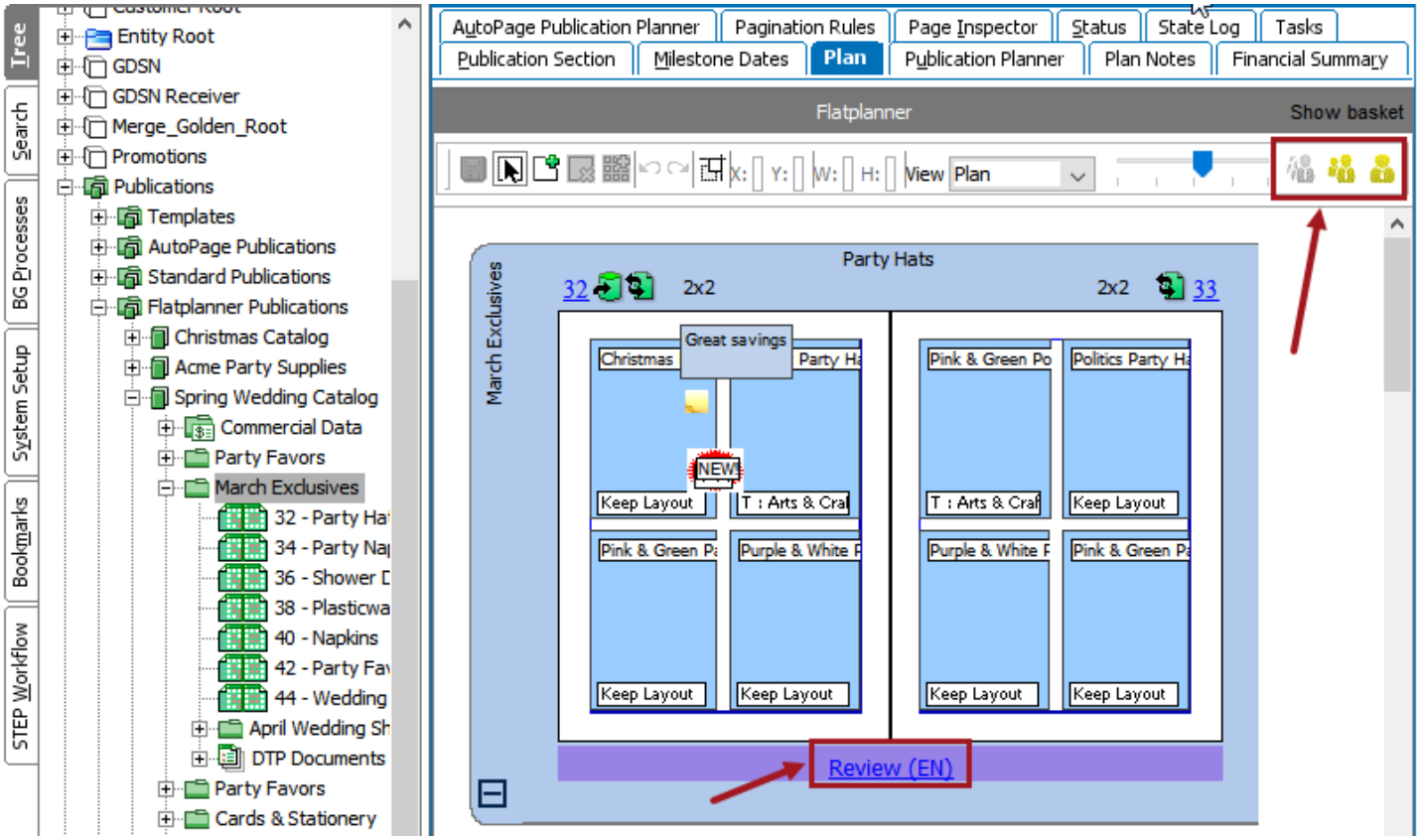
6. The planned page spread displays in the **Flatplanner** on the **Plan** tab. Plan your page, and then click the **Save** icon in the toolbar to save the changes.
7. Click on the **Tasks** tab to navigate to the Tasks view.



8. On the **Tasks** tab, click **Submit** to move the spread to the next workflow state. A **Submit items** dialog displays where you can optionally enter information about the page.
9. Click **Submit Now**. The page moves along to the next state in the workflow, a 'hidden' state named **BGP-MountDocForPlan**.

Alternate Submission Method - Plan Tab

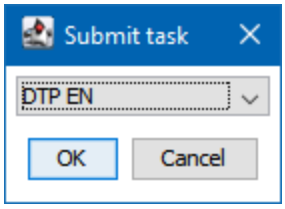
When viewing multiple planned pages from the **publication**, **section**, or **subsection** level on the **Plan** tab, the same workflow assignment icons that display in the **Tasks** tab display in the upper right corner of the Flatplanner pane, as shown in the below screenshot.



Click on the Show All Plans icon ( ) to view all plans. Click on Show Group Assigned Plans ( ) to only view plans that are assigned to a user group. Click the Show Assigned Plans icon ( ) to only view plans that are assigned to you.

When a plan is assigned to you, the name of the state will be hyperlinked, as shown in the above screenshot, e.g., Review (EN). This hyperlink enables you to submit the page to another workflow state.

1. To submit the plan to another workflow state, click on the hyperlinked state name.
2. In the **Submit task** dialog, select the relevant state from the dropdown list, then click **OK**.



3. A **Submit items** dialog displays where you can optionally enter information about the page.
4. Click **Submit Now**. The page moves to the specified workflow state.

Auto-generation of the Actual Page

In the **BGP-MountDocForPlan** state, a background process calls the InDesign server. The InDesign server then generates (mounts) the actual pages based on the information linked to the Flatplanner page spread. When completed, the InDesign server saves these actual pages into STEP.

> **Note:** An InDesign server (sidecar) must be connected to your STEP system in order for this background process to run. For more information on the deployment of an InDesign server, contact Stibo Systems.

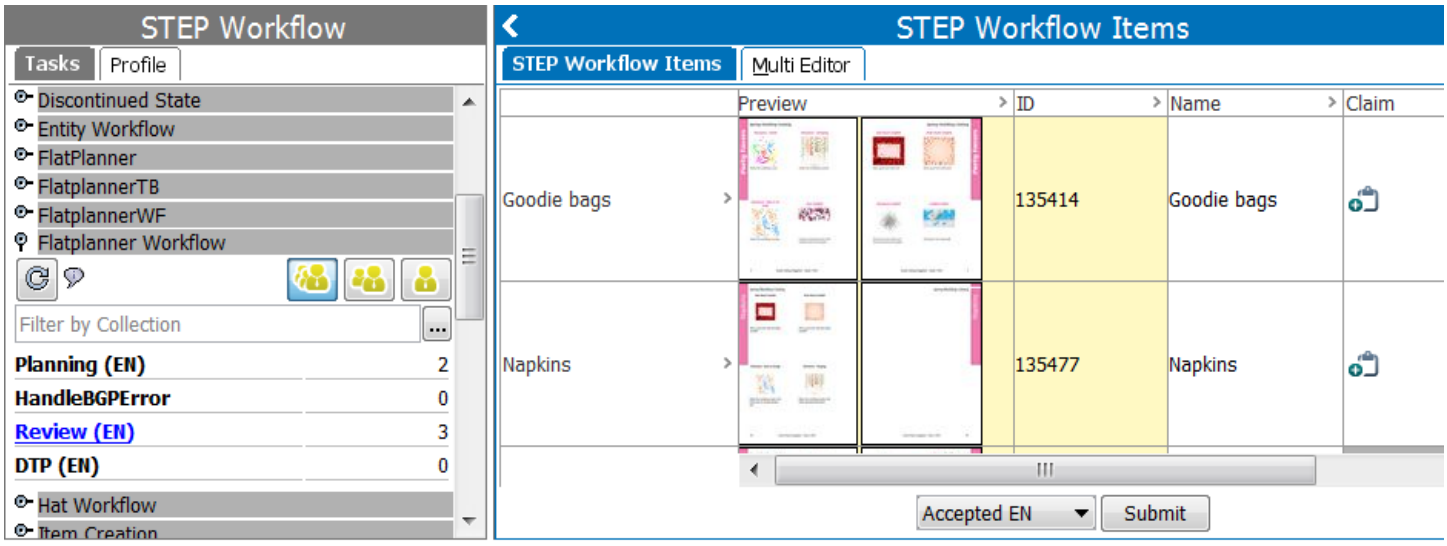
Once the InDesign server saves the actual pages to STEP, the actual pages are routed to the **Review** state.

If the background process fails (for reasons that could include the InDesign server being offline), and the actual pages are not generated by the InDesign server, then business rules may be put in place that will route the planned pages into the **DTPPageWork** state in order for a DTP (Desktop Publishing) operator to manually mount the Flatplan onto actual pages in InDesign.

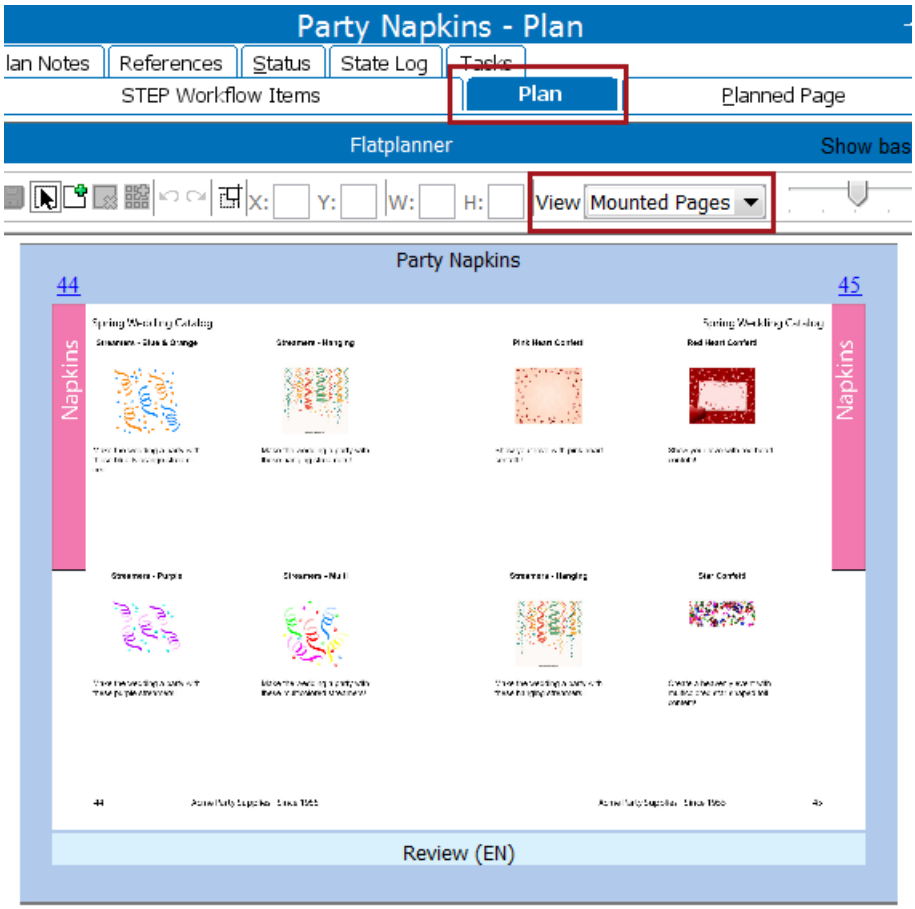
Reviewing the Actual Page

In a typical page reviewing state, you will look at the mounted actual pages to determine if the pages are OK as-is or if they need additional layout work performed in InDesign.

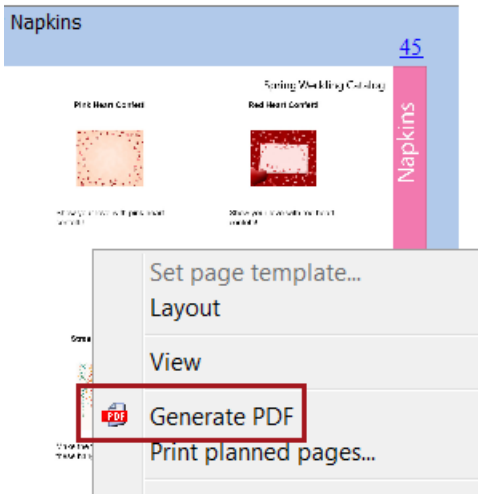
1. To determine if you have been assigned a page reviewing task, follow steps **1 - 4** as outlined in the previous section, except this time click on the **Review (EN)** state.
2. In the **Preview** column, click the page spread that you want to review.



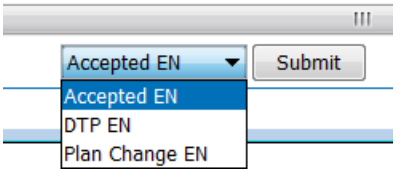
3. The actual page displays in the Flatplanner on the **Plan** tab in the **Mounted Pages** view.



4. To generate a PDF of the actual page, right-click anywhere on the displayed page and select **Generate PDF**. The system will call the InDesign server and a PDF of the page will generate and open automatically.



5. When you have finished reviewing the page, the following **Submit** options are available in this sample workflow:



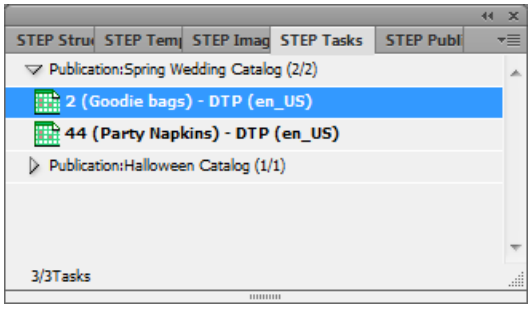
- **Accepted EN**: The page is approved and is sent to the **Done** state of the workflow, at which point it is removed from the workflow.
- **DTP EN:** The page needs some manual work performed on it by a DTP operator in InDesign. The page will be sent to the **DTPPageWork** state [**DTP (EN)**], which is a state in which the task must be accepted in InDesign.
- **Plan Change EN:** The Flatplan needs more planning work performed in the workbench. The page will be returned to the **Planning (EN)** state.

Accepting a DTP Task in InDesign

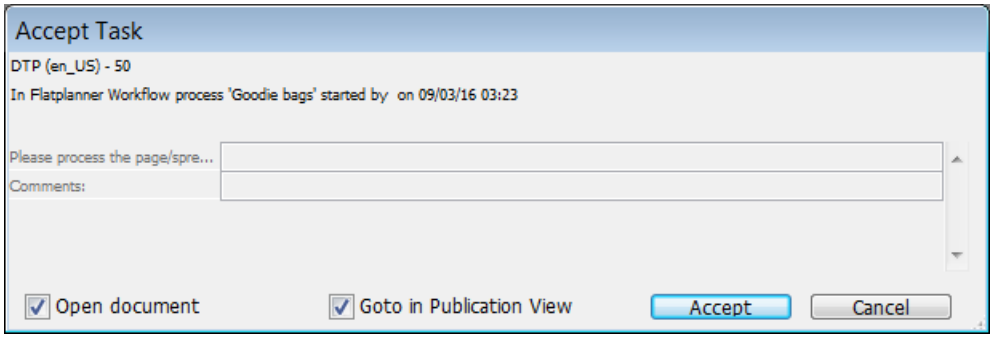
If the page reviewer chose the **DTP EN** transition from the Review state in the workbench, the page is routed to the **DTPPageWork** state [**DTP (EN)**] in this sample Flatplanner workflow. Tasks in the DTPPageWork state must be accepted from within InDesign.

To accept a Flatplanner workflow task from within InDesign:

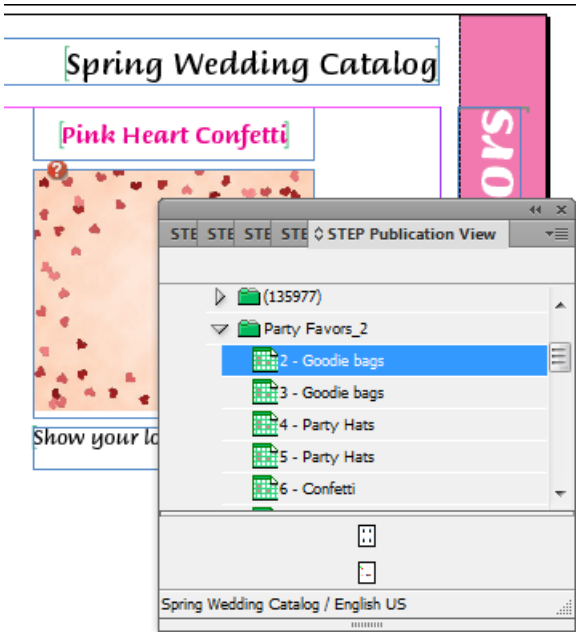
1. Open InDesign and log onto the relevant STEP system.
2. Navigate to Window > **STEP Tasks**. The **STEP Tasks** panel displays.
3. Click the arrow ▶ next to the relevant publication to expand all tasks that are available for that publication.



4. Right-click on the relevant page, then click **Accept Task**. The **Accept Task** dialog displays.

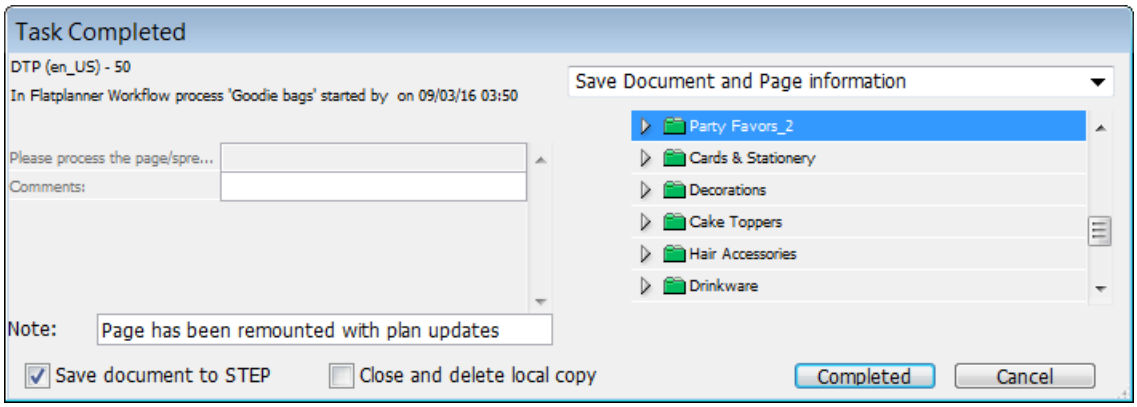


5. Click **Accept** to simultaneously open the document and the **STEP Publication View** panel, where the accepted page will be highlighted.



Note: Open document and **Goto in Publication view** are checked by default in the Accept Task dialog. Uncheck **Open document** if you would like to finish claiming the task but open the document later. Uncheck **Goto in Publication View** if you do not want the STEP Publication View panel to automatically display when the page is opened.

6. Once you have finished work on the pages, return to the **STEP Tasks** panel. Right-click the page that you were just working on (which is distinguishable by no longer being in bold text), then click **Task Completed**. The **Task Completed** dialog displays.



7. To save the finished document back to STEP (which is the most common action at this stage of the workflow), check the **Save document to STEP** box, then click **Completed**. The section folder where the actual pages should be saved in STEP is highlighted automatically. Optionally, you may leave a comment in

the **Note** field (and/or **Comments** field, if present, depending on your workflow's configuration).
If you prefer to not save your documents locally and only save them in STEP, then check **Close and delete local copy** before clicking **Completed**.

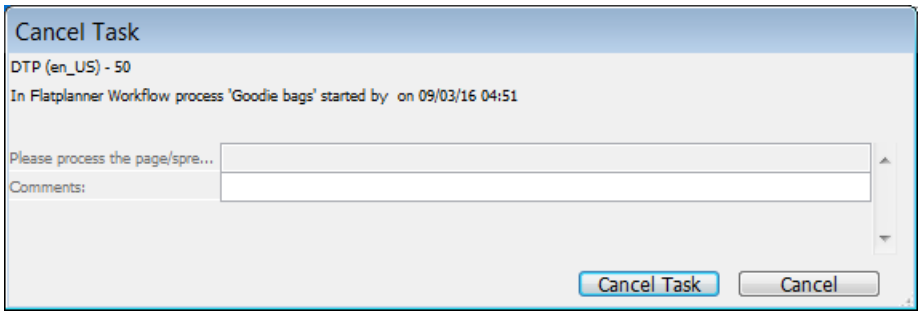
> **Note:** The page must first be saved locally, regardless, before it can be saved back to STEP.

8. In this sample workflow, the actual page will now be routed back to the **Review** state for final signoff by a page reviewer (e.g., the merchandiser).

Canceling a DTP Task in InDesign

If, after you claim the task in InDesign, you determine that you need to release it back to your user group so another user can claim it, you may cancel the task. To cancel the task, follow these steps:

1. In the **STEP Tasks** panel, right-click on the page and select **Cancel Task**. The **Cancel Task** dialog displays.

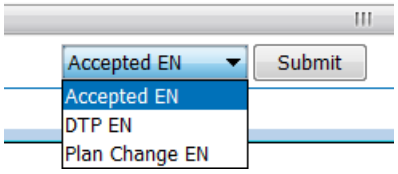


2. Click **Cancel Task** to reject the task, enabling another user from your group to claim it. The task will remain in the **STEP Tasks** panel and return to bold text.
If your workflow has been configured with a Comments variable, you may optionally leave a comment in this field. For more instruction on how to configure the Tasks view in InDesign, see the **Configuring Flatplanner Workflows** section of the **Flatplanner** documentation.

Final Review

When the InDesign page has been completed, or if it never needed to be updated in the first place, the page will be in the **Review** state of this sample Flatplanner workflow. To complete the journey of the page, follow these steps:

1. Follow the same steps as outlined in the previous **Reviewing the Actual Page** section of this topic.
2. When the page is completed, select **Accepted EN** to route the page to the **Done** state. Typically, an on-entry business rule action will be applied to the state to automatically remove the page from the workflow.



Starting and Stopping Flatplanner Workflows

Planned Pages (also known as **pages** or **spreads**) can be initiated into a Flatplanner workflow both manually and automatically. By either method, planned pages can be initiated into a workflow on a one-at-a-time basis or in bulk actions where multiple pages are initiated at once.

Pages can be initiated manually from both the **Publication Planner** and **Tree**, and automatically upon their creation when the primary Flatplanner workflow is set to initiate automatically.

Planned Pages can be manually removed from a Flatplanner workflow from the same two locations where they can be manually initiated: the Publication Planner and the Tree.

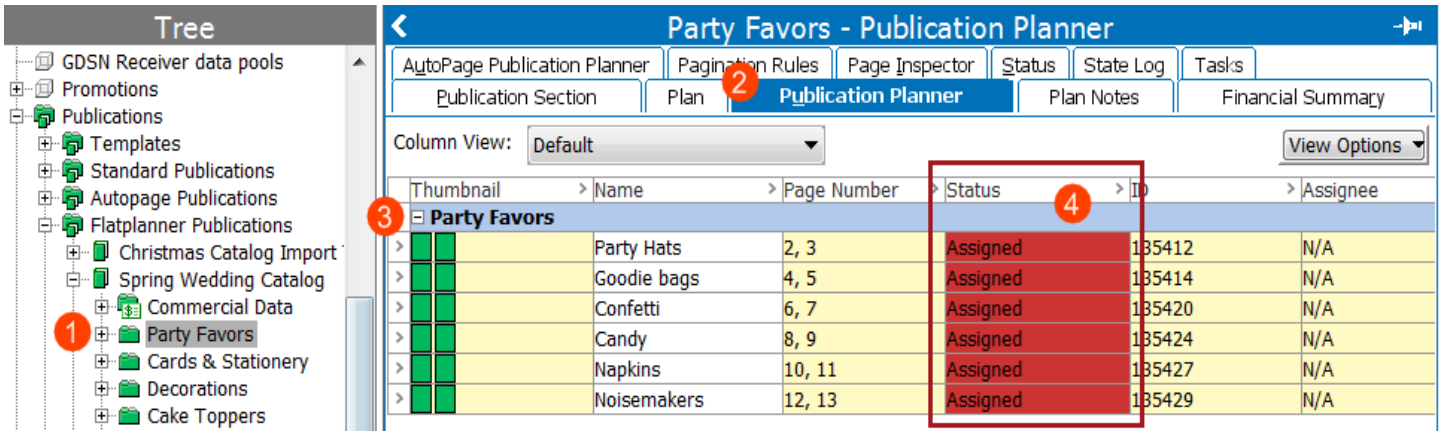
Starting the Workflow Manually

If your Flatplanner workflow has not been configured to initiate automatically, you will need to manually initiate your Planned Pages into the workflow. Planned Pages can be initiated into a Flatplanner workflow from two locations: the **Publication Planner** and the **Tree**.

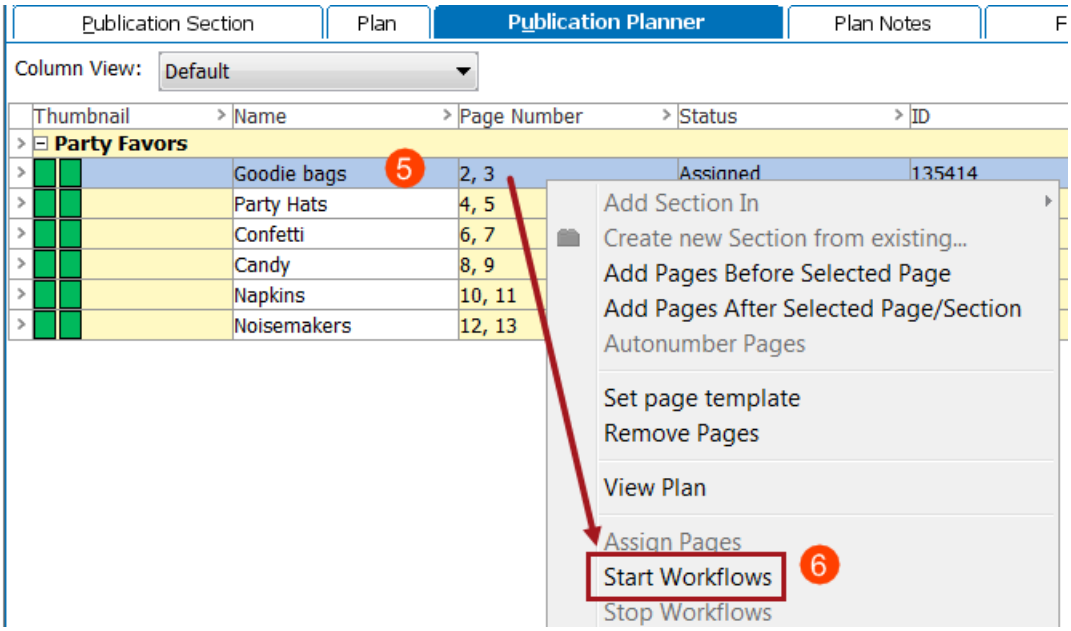
Method 1 - Publication Planner

To manually initiate a Planned Page into a Flatplanner workflow from the Publication Planner, follow these steps:

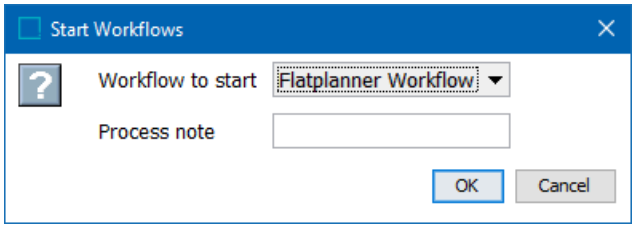
1. In the **Tree**, expand the **Publication** hierarchy, and then select the relevant **publication** or **section**. The Publication Planner is accessible from both locations.
2. Click on the **Publication Planner** tab.
3. On the **Publication Planner** tab, click the plus **+** sign next to the relevant section to view the Planned Pages within the Section. If your Publication Planner view has not been configured with the 'Group by section' view option, the Section name and **+** sign will not appear.
4. Planned Pages that are not already in a workflow will show a status of **Assigned** in the Publication Planner. Assigned means that the planned page will automatically be assigned to a User Group once the page is initiated into the workflow.



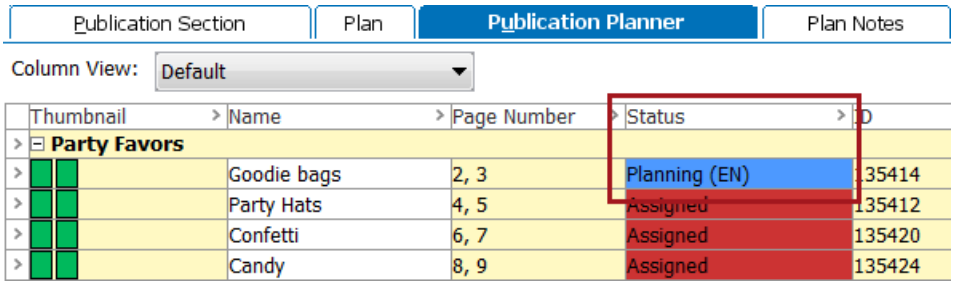
5. Select the Planned Page spread or spreads that you would like to initiate into a Flatplanner workflow. Spreads may be multi-selected by holding Ctrl or Shift while making selections.
6. Right-click and select **Start Workflows**. The **Start Workflows** dialog displays.



7. In the **Start Workflows** dialog, select the relevant workflow from the **Workflow to start** dropdown list, then click **OK**. Optionally, you may enter a process note in the **Process note** field.



8. The planned page is initiated into the initial state of the selected Flatplanner workflow.

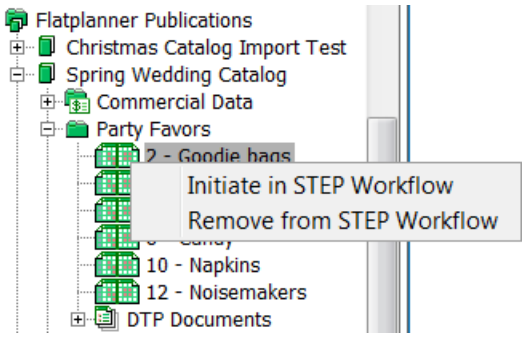


Note: Once a Planned Page (spread) has been initiated into a Flatplanner workflow, it may not be initiated into another Flatplanner workflow.

Method 2 - Tree

To manually initiate a Planned Page into a Flatplanner workflow from the Tree, follow these steps:

1. In the Tree, navigate to the Planned Page(s) that you would like to initiate into the workflow.
2. Right-click and select **Initiate in STEP Workflow**. Multiple Planned Page spreads may be chosen at once by holding Ctrl or Shift while making selections.

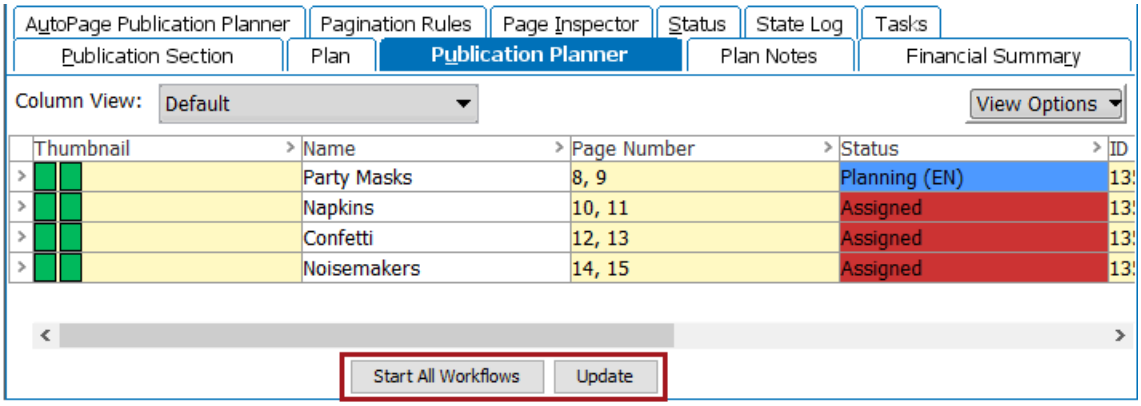


3. In the **Start Workflows** dialog, select the relevant workflow from the **Workflow to start** dropdown list, then click **OK**. Optionally, you may also enter a process note in the **Process note** field.
4. The Planned Page is initiated into the initial state of the selected Flatplanner workflow.

Note: Once a Planned Page has been initiated into a Flatplanner workflow, it may not be initiated into another Flatplanner workflow.

Start All Workflows Option in Publication Planner

As outlined in the steps in the previous two sections, multiple Planned Pages can be initiated into a workflow by multi-selecting them in the Tree or Publication Planner. A third option also exists to submit Planned Pages into a workflow at once: the **Start All Workflows** button in the Publication Planner.



Clicking **Start All Workflows** is essentially the same thing as multi-selecting all Planned Pages in the Publication Planner, right-clicking, and selecting **Start Workflows**. This button merely provides the convenience of a one-click operation to achieve the same outcome.

Starting the Workflow Automatically

If the Flatplanner workflow is set to auto-initiate, new spreads will automatically appear in the initial state in the Publication Planner.

In order to allow Planned Pages to initiate automatically in the workflow, follow these steps, which are the same as for any standard STEP workflow:

1. In **System Setup**, navigate to the relevant Flatplanner workflow.
2. On the **STEP Workflow Editor** tab, check the **Initiate automatically** box.
3. New Planned Pages will automatically initiate into this workflow when created.

Note: Though STEP systems of version 8.0 and above allow the existence of more than one Flatplanner workflow, only *one* Flatplanner workflow at a time should ever be set to auto-initiate. Allowing Planned Pages in more than one workflow at once can cause conflicts if more than one user is working on the same page at the same time, as STEP provides no version control to prevent multiple users from saving over each other's work.

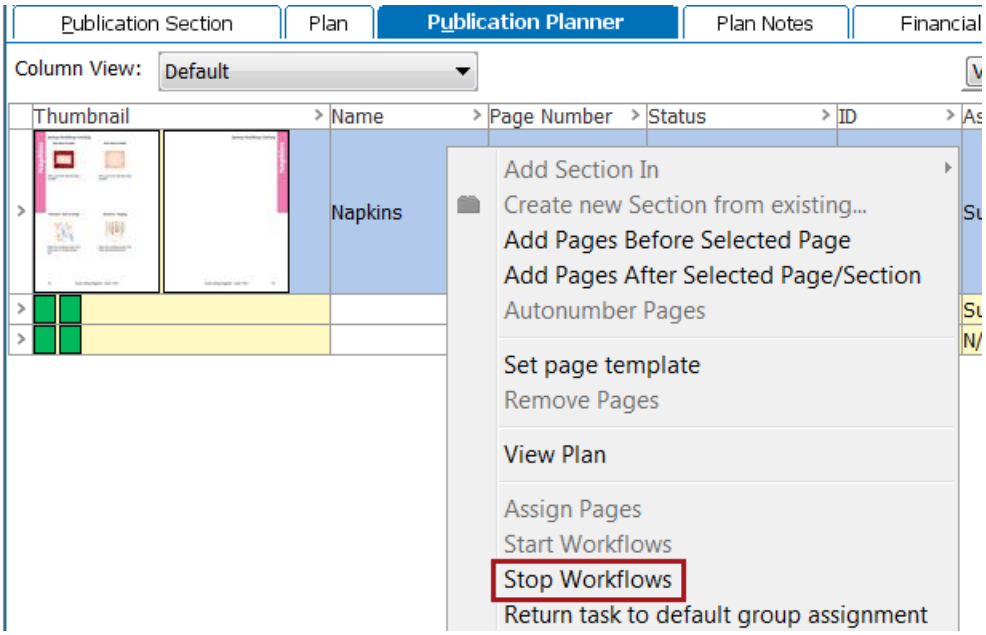
Stopping the Workflow

Planned Pages may be manually removed from workflows in the same two locations where they can be started manually: in the **Publication Planner** and in the **Tree**.

Method 1 - Publication Planner

To remove a Planned Page from a Flatplanner workflow from the Publication Planner, follow these steps:

1. In the **Tree**, expand the **Publication** hierarchy, and then select the relevant Publication or Section.
2. On the **Publication Planner** tab, click the plus **+** sign next to the relevant Section to view the Planned Pages within the Section.
3. Right-click the relevant spread(s) and click **Stop Workflows**.

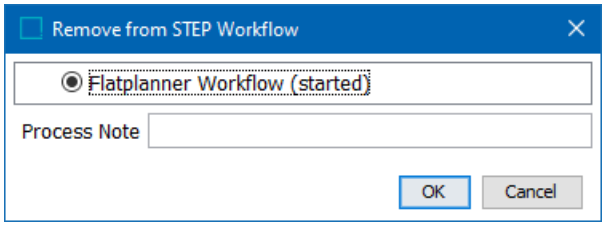


4. The **Stop Workflows** dialog appears. Click **Yes**.
5. The spread is now removed from the workflow.

Method 2 - Tree

To manually remove a Planned Page from a Flatplanner workflow from the Tree, follow these steps:

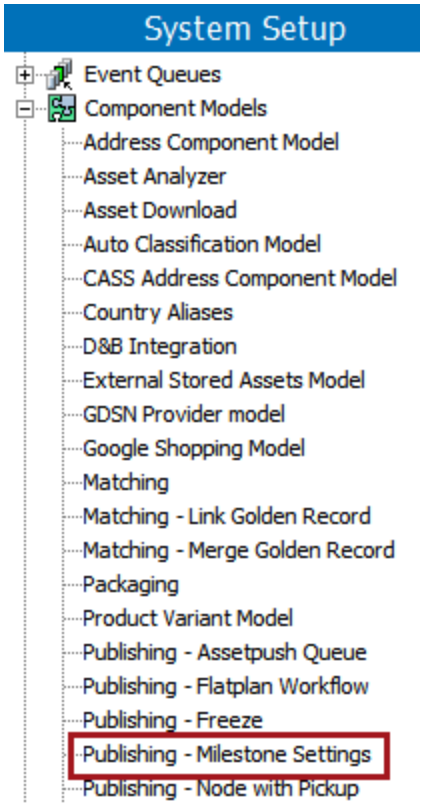
1. Navigate to the Planned Page(s) that you would like to remove from the workflow.
2. Right-click and select **Remove from STEP Workflow**.
3. In the **Remove from STEP Workflow** dialog, select the workflow that the spread is in, then click OK. (Typically, spreads are only in one workflow.) Optionally, you may also add a Process Note.



4. The spread is now removed from the workflow.

Publication Milestones

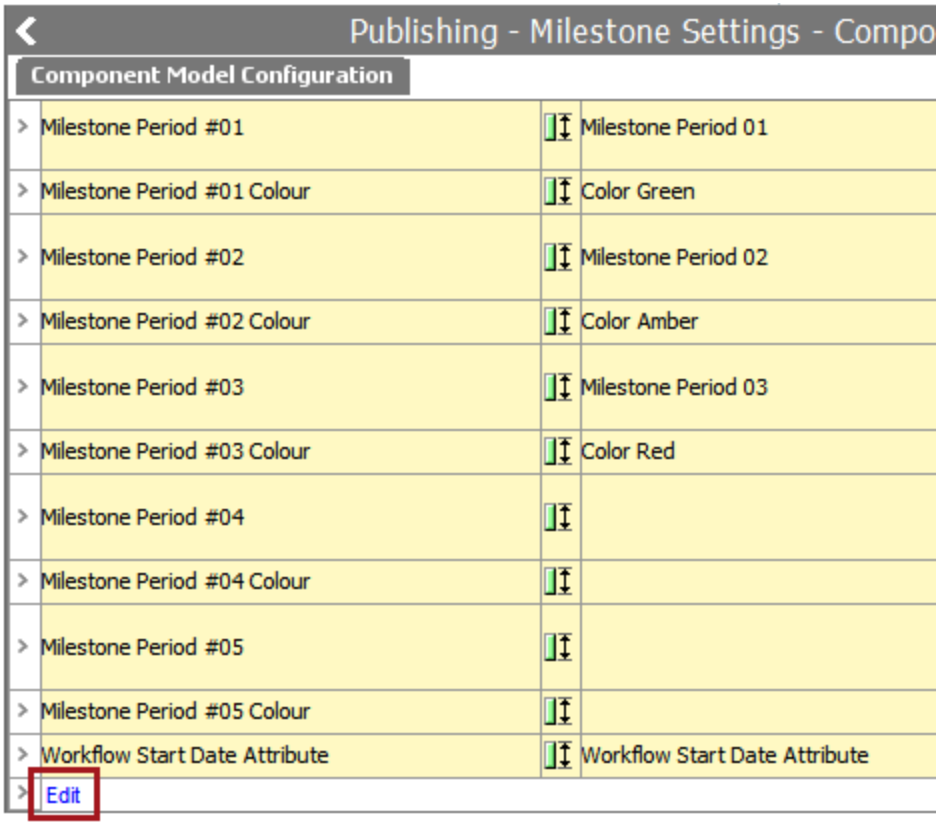
The Component Model **Publishing - Milestone Settings** enables monitoring of Flatplan workflow progress in the **Publication Planner** via the Next Milestone Date/Next Milestone Name and Traffic Light Name columns.



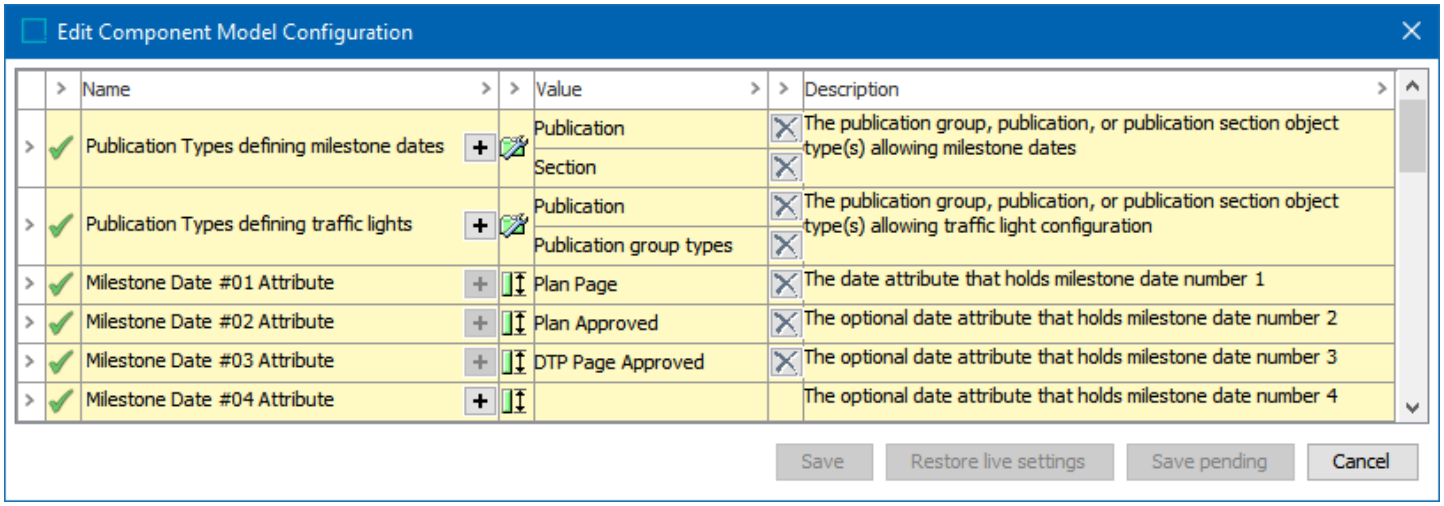
Configuring the 'Publishing - Milestones' Component Model

The Publishing - Milestone Settings component model allows you to configure the information required to set up publication milestones. To edit the component model:

1. Select the Publishing - Milestone Settings component model in System Setup, then scroll to the bottom of the fields on the **Component Model Configuration** tab and click **Edit**.



2. In the **Edit Component Model Configuration** dialog, double-click the **plus-sign** icons to add or edit object types and attributes. Click the **X** icons to remove object types and attributes.

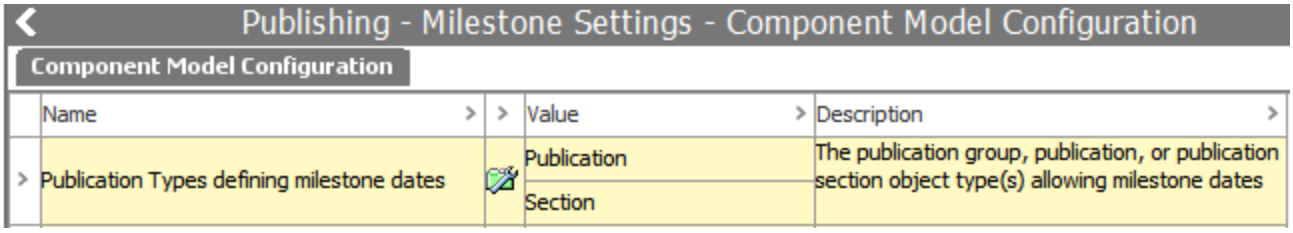


3. After making edits, the **Save** and **Save pending** buttons at the bottom of the dialog are activated. Click **Save** to remove the object type / attribute and close the dialog. Click **Save pending** to keep the live configuration as-is and make additional changes later.

The following fields are edited in the Publishing - Milestone Settings component model:

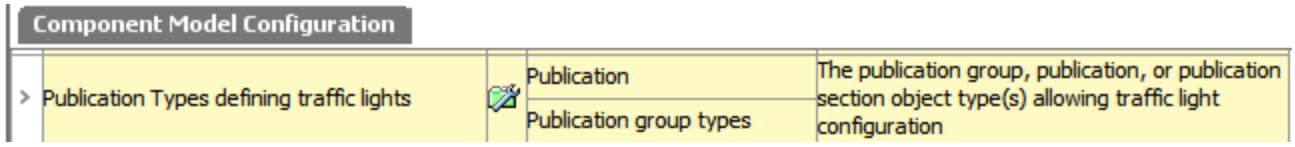
Publication Types Defining Milestone Dates

Select the object types where **milestone dates** can be entered. Section is required, and publication is also typically selected, but a publication group can also be chosen.



Publication Types Defining Traffic Lights

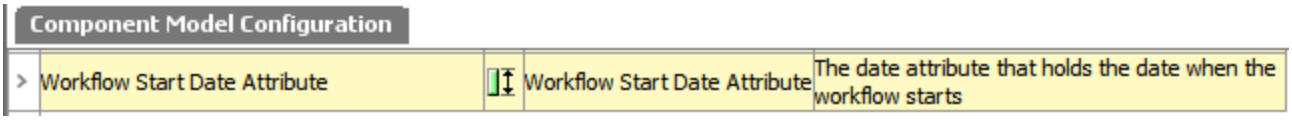
Select the object types where **traffic lights** can be defined—normally publication group.



Workflow Start Date Attribute

Select the attribute that is used to hold the date when the workflow starts.

Note: This attribute is required.



Milestone Date Attributes

Add up to 20 additional attributes to hold the subsequent milestone dates. Only the 'Milestone Date #01 Attribute' (the date attribute that holds milestone date number 1) is required.

Component Model Configuration

Milestone Date #01 Attribute		Plan Page	The date attribute that holds milestone date number 1
Milestone Date #02 Attribute		Plan Approved	The optional date attribute that holds milestone date number 2
Milestone Date #03 Attribute		DTP Page Approved	The optional date attribute that holds milestone date number 3
Milestone Date #04 Attribute			The optional date attribute that holds milestone date number 4
Milestone Date #05 Attribute			The optional date attribute that holds milestone date number 5
Milestone Date #06 Attribute			The optional date attribute that holds milestone date number 6
Milestone Date #07 Attribute			The optional date attribute that holds milestone date number 7
Milestone Date #08 Attribute			The optional date attribute that holds milestone date number 8
Milestone Date #09 Attribute			The optional date attribute that holds milestone date number 9
Milestone Date #10 Attribute			The optional date attribute that holds milestone date number 10
Milestone Date #11 Attribute			The optional date attribute that holds milestone date number 11
Milestone Date #12 Attribute			The optional date attribute that holds milestone date number 12
Milestone Date #13 Attribute			The optional date attribute that holds milestone date number 13
Milestone Date #14 Attribute			The optional date attribute that holds milestone date number 14
Milestone Date #15 Attribute			The optional date attribute that holds milestone date number 15
Milestone Date #16 Attribute			The optional date attribute that holds milestone date number 16
Milestone Date #17 Attribute			The optional date attribute that holds milestone date number 17
Milestone Date #18 Attribute			The optional date attribute that holds milestone date number 18
Milestone Date #19 Attribute			The optional date attribute that holds milestone date number 19
Milestone Date #20 Attribute			The optional date attribute that holds milestone date number 20

Milestone Period and Color Attributes

Up to five milestone 'traffic light 'colors can be defined—each of which requires a numeric attribute to store the 'percentage of working time remaining' (**Milestone Period**) and a second attribute to store the traffic light color (**Milestone Period Colour**).

Important: Milestone Period and Milestone Colour attributes must be set up in pairs.

Component Model Configuration

>	Milestone Period #01		Milestone Period 01	The numeric attribute that holds the percentage of time remaining between the previous and next milestone to start using the Period #01 traffic light colour
>	Milestone Period #01 Colour		Color Green	The text attribute that holds the colour representing period 1
>	Milestone Period #02		Milestone Period 02	The numeric attribute that holds the percentage of time remaining between the previous and next milestone to start using the Period #02 traffic light colour
>	Milestone Period #02 Colour		Color Amber	The text attribute that holds the colour representing period 2
>	Milestone Period #03		Milestone Period 03	The optional numeric attribute that holds the percentage of time remaining between the previous and next milestone to start using the Period #03 traffic light colour
>	Milestone Period #03 Colour		Color Red	The optional text attribute that holds the colour representing period 3
>	Milestone Period #04			The optional numeric attribute that holds the percentage of time remaining between the previous and next milestone to start using the Period #04 traffic light colour
>	Milestone Period #04 Colour			The optional text attribute that holds the colour representing period 4
>	Milestone Period #05			The optional numeric attribute that holds the percentage of time remaining between the previous and next milestone to start using the Period #05 traffic light colour
>	Milestone Period #05 Colour			The optional text attribute that holds the colour representing period 5
>	Workflow Start Date Attribute		Workflow Start Date Attribute	The date attribute that holds the date when the workflow starts

Milestone Period Attributes

The **Milestone Period** attribute is a numeric attribute that holds the percentage of time remaining between the previous and next milestone to start using the Period #01 traffic light color (e.g., 'Milestone Period #01' could be set to 100%, 'Milestone Period #02' to 50%, etc.).

Up to five Milestone Periods are supported. Two of these are required ('Milestone Period #01' and 'Milestone Period #02'). These should be set up as **description** attributes with the validation base type of 'Integer' with a minimum value of 0 and maximum value of 100.

Examples of milestone period attributes could be Planning Date, Ready for Final Price, Final Approval, etc.

Note: Make sure these attributes are valid attributes for your publication group, publication, and/or section object types.

Milestone Color Attributes

Up to five **Milestone Colours** are supported. Two of these are required ('Milestone Period #01 Colour' and 'Milestone Period #02 Colour'). These attributes are used to store the color that represents the corresponding period.

These should be set up as **description** attributes with a validation base type of 'Regular Expression' with the regular expression field set to `[0-9a-f]{6}`. This validation base type is required since the value must be a hex color string, and it prevents users from entering invalid information into the field.

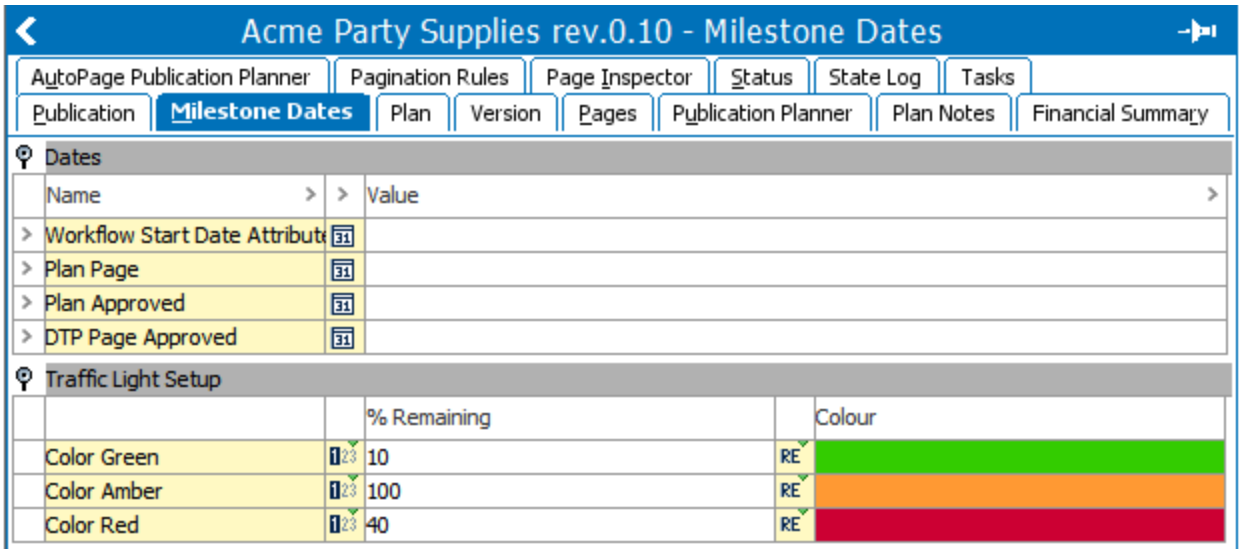
For information on how to easily edit these attributes by double-clicking in the attribute field and picking a color from an editor, see the 'Editing Milestone Dates and Colors' subsection below. For more information on regular expressions, see the **Regular Expression** topic in the **Resource Materials** online help.

The milestone color attributes could be named with the colors themselves, e.g., Color Green, Color Yellow, etc.

Note: Make sure these attributes are valid attributes for your publication group, publication, and/or section object types.

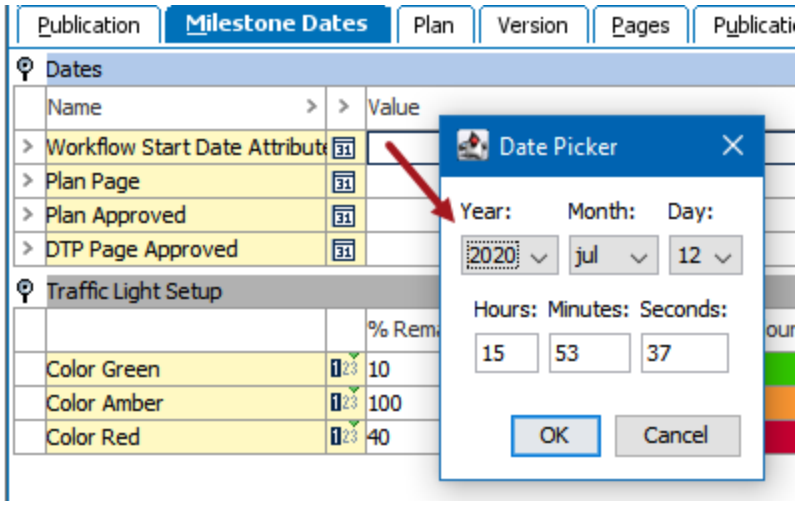
Editing Milestone Dates and Colors

Values are added for milestone dates and colors on the **Milestone Dates** tab, which is available on publication groups, publications, and sections. The available attributes are those that were added in the component model.



Dates

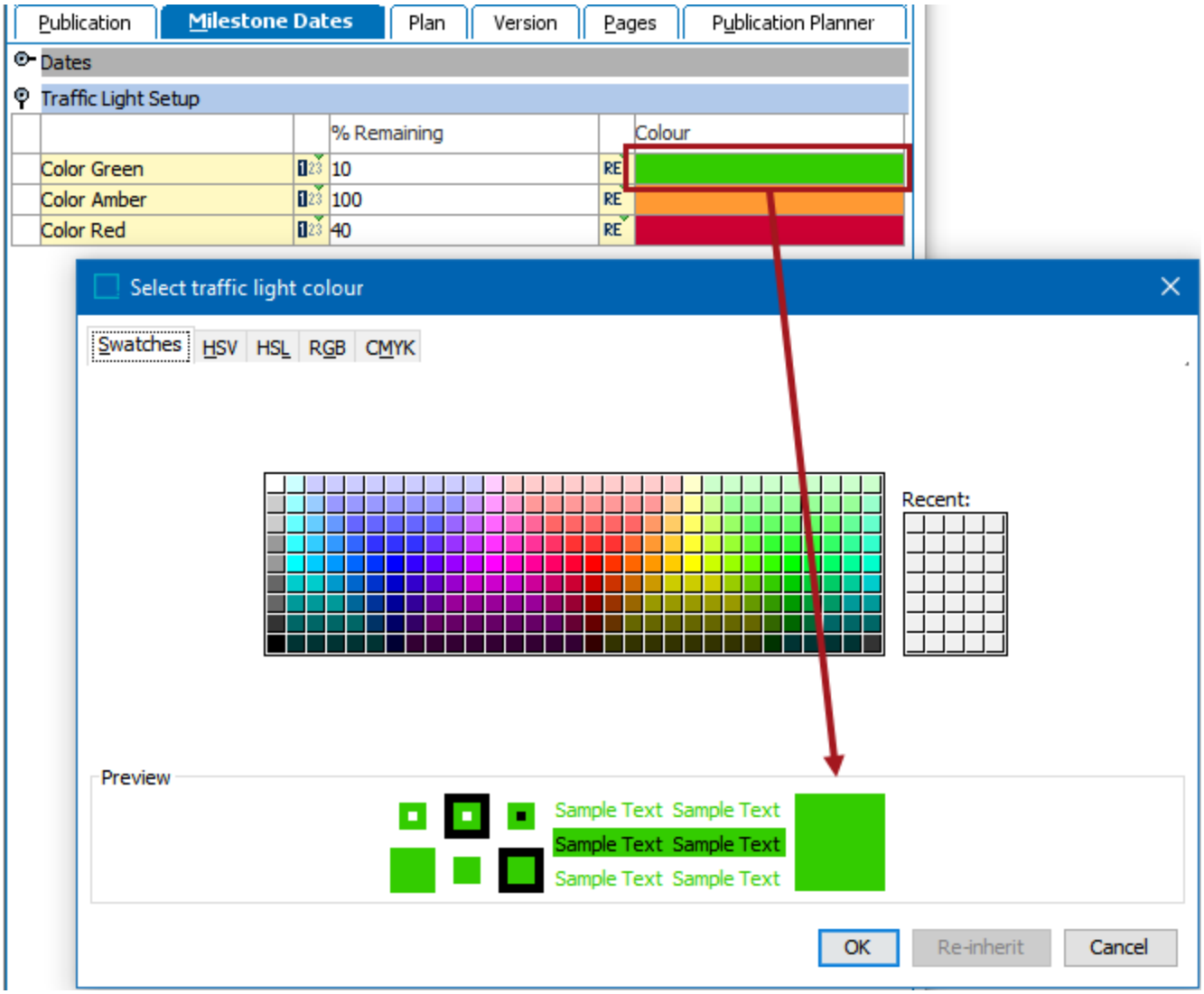
To add values to the **Dates** attributes, it is recommended to use the **Date Picker**, which is available by double-clicking in the attribute field.



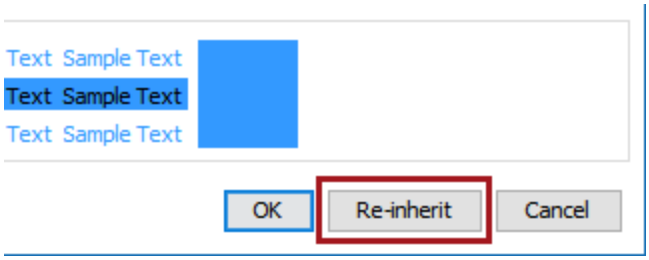
Date values are inherited in the hierarchy and any values can be overridden further down the hierarchy by setting them at the relevant level. To re-inherit the date or % remaining from further up in the hierarchy, delete the value at the relevant level. E.g., if the milestone date has been overridden at 'Section 1' level, to re-inherit it from the Publication level, delete the value from the Section 1 level.

Traffic Light Setup - Colors

To add color information to the **Traffic Light Setup** attributes, double-click in the attribute field to choose a color in the **Select traffic light colour** dialog, then click **OK**.



Color values are inherited in the hierarchy and any values can be overridden further down the hierarchy by setting them at the relevant level. E.g., if the color has been overridden at 'Section 1' level, to re-inherit it from the Publication level, edit the color via the 'Select traffic light colour' dialog and select **Re-inherit**.

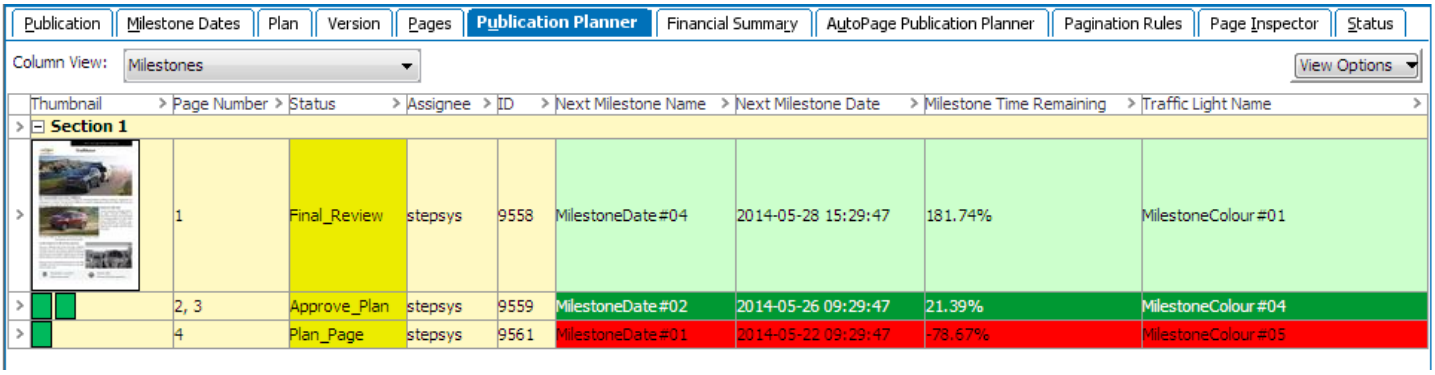


Viewing Milestone Information in the Publication Planner

Milestone-related columns are available to display the milestone information in the Publication Planner. These are:

- Next Milestone Name
- Next Milestone Date
- Milestone Time Remaining
- Traffic Light Name

For more information on how to add these columns to the Publication Planner, see the **Configuring the Publication Planner Column View** topic.



'Publishing - Milestone Settings' Component Model Example Setup

The following table shows a sample initial setup for a Publishing - Milestone Settings component model, including the object types and attributes applied to a selection of fields.

Component Model Field	Example Object Type or Attribute Name	Attribute Validation Type
Publication Types defining milestone dates	Publication	N/A (object type)
Publication Types defining traffic lights	Publication Group	N/A (object type)
Workflow Start	Start Date	ISO Date and Time
Milestone Date #01 Attribute	Plan Page	ISO Date and Time
Milestone Date #02 Attribute	Plan Approved	ISO Date and Time
Milestone Date #03 Attribute	DTP Page Approved	ISO Date and Time
Period #01	Normal Period	Number

Component Model Field	Example Object Type or Attribute Name	Attribute Validation Type
Period #01 Colour	Normal Color	Regular Expression: [0-9a-f]{6}
Period #02	Warning Period	Number
Period #02 Colour	Warning Color	Regular Expression: [0-9a-f]{6}
Period #03	Late Period	Number
Period #03 Colour	Late Colour	Regular Expression: [0-9a-f]{6}

The other configuration option that affects the milestones is the definition of the working week. Unless modified, the default setting is Monday to Friday from 09:00 to 17:00. When entering the milestone dates for a publication it is advisable that they are set to be during working time. Contact your Stibo Systems account manager if you need another definition of a working week.

Milestone Attribute Configuration Example on Publication Level

The following table expands on the previous table to show sample values for the aforementioned attributes and a description of their functions. These attributes would be valid at the publication level.

Attribute Name	Example value	Description
Start Date	2020-08-20 09:00:00	Tuesday
Plan Page	2020-09-02 09:00:00	Monday
Plan Approved	2020-09-10 09:00:00	Tuesday
DTP Page Approved	2020-09-20 09:00:00	Friday
Normal Period	100	If the remaining working time is 100%, then...
Normal Colour	'green'	... the traffic light is green.

Attribute Name	Example value	Description
Warning Period	40	If the remaining working time is 40%, then...
Warning Colour	'amber'	... the traffic light is amber.
Late Period	0	If the remaining working time is 0%, then...
Late Colour	'red'	... the traffic light is red.

The milestone and traffic light information shown in the Publication Planner for a given page is calculated in the following way:

- The workflow variable MILESTONE contains the Attribute ID of the next milestone date applicable to that Flatplanner workflow. This variable is set by the business rules attached to the states within the workflow.
- The name of this attribute is displayed in the **Next Milestone Name** column of the Publication Planner.
- The **Next Milestone date** is the value of the attribute obtained from the first publication / publication group above the Flatplan with a value.
- The duration of the current task is then calculated as the amount of working time between the next milestone date and the milestone prior to that date.
- The amount of remaining working time is then calculated as the difference between the next milestone date and the current date and time.
- The percentage of remaining time is the amount of remaining working time as a percentage of the duration of the current task. This can be greater than 100% and can also be negative if the next milestone date is in the past.
- The traffic light is selected based on the percentage of remaining working time. From the above example: percentages of 0% or less will show as red, 40% to 1% as amber, and everything else as green.
- The **Traffic Light Name** is the name of the attribute defining the traffic light color.

Sample Monitoring of Flatplan Workflow Progress in the Publication Planner

Assuming that a publication has been created with the example date and color attributes shown in the table above, and that the current time is Friday 2020-09-06 09:00:00, then this is how the traffic light colors would be calculated. The following table assumes a traffic light status with a current date / time of 2020-09-06 09:00:00

Page	Workflow MILESTONE	Color	Explanation
1	Plan page	'red'	The next milestone date is (Plan Page) 2020-09-02 09:00:00

Page	Workflow MILESTONE	Color	Explanation
			The previous milestone date is (Start Date) 2020-08-20 09:00:00 The duration of the current task is therefore 8 working days The current date/time exceeds (Plan Page) 2020-09-02 09:00:00 by 6 working days. -6 as a percentage of 8 is -78% and so the corresponding color is 'red'
2-3	DTP Page approved	'green'	The next milestone date is (DTP Page Approved) 2020-09-20 09:00:00 The previous milestone date is (Plan Approved) 2020-09-10 09:00:00 The duration of the current task is therefore 8 working days There are 10 working days from the current date/time until the next milestone date 10 as a percentage of 8 is 125% and so the corresponding color is 'green'
4-5	Plan Approved	'amber'	The next milestone date is (Plan Approved) 2020-09-10 09:00:00 The previous milestone date is (Plan Page) 2020-09-02 09:00:00 The duration of the current task is therefore 6 working days There are 2 working days from the current date/time until the next milestone date 2 as a percentage of 6 is 33% and so the corresponding color is 'amber'

Commercial Data

Pricing and sales information is **commercial data** that is typically used in conjunction with STEP Publisher and Tables. Commercial data consists of **terms**, which are complied in terms **lists**. A term is typically related to a product object and is often a combination of a value and a set of conditions such as Minimum Quantity, Maximum Quantity, Start Date, and End Date.

Commercial data can provide access to information about past sales, current inventory levels, and previous placement of a product in a publication. As a result, products can be assigned to publications based on commercial facts such as sales performance, sales forecast, and margins.

Using commercial data lists to store this type of information has the following advantages over using normal attributes:

- Editing commercial terms for a product does not cause a product to become unapproved.
- Since terms list configurations are tied to individual **publications**, the same object can have different pricing in different publications simultaneously, reducing the need for numerous pricing attributes.

The most common locations where commercial data values are used are:

- **Flatplanner** Sticker Book, Basket, Financial Summary, and Financial Report
- **Tables** that include pricing or other version-specific data
- **InDesign** pages, when mounting pricing information directly as part of product presentations

Prerequisites

The guide assumes the following:

- Users have a working knowledge of STEP
- Publications have already been created in STEP and have at least one version defined

For more information about publications and versions, see the **STEP Publisher (Adobe InDesign Integration)** documentation.

Commercial Data Privileges and Actions

The setup and maintenance of commercial data terms lists are controlled by privileges. The following **User Actions** are available for controlling users' access to commercial data. For more information on user actions and granting privileges, see the **Privilege Rules** section of the **System Setup** / **Super User Guide** documentation.

Action	Description
View Commercial	Users can only view commercial data. They cannot make changes.

Action	Description
Data	
Delete Commercial List	Users are able to delete commercial lists.
Create Commercial List	Users are able to create commercial lists, but they cannot modify data in commercial lists.
Freeze/Thaw commercial list	This action prevents commercial lists from being updated.
Modify Commercial Data	Users can modify the individual terms in commercial terms lists **Note:** This action does not grant access to import data. In order to import commercial terms values, the 'Create Commercial List' action is needed.
Modify Commercial List Name	Users can provide names for commercial terms lists.
Modify Metadata Value Commercial List	User can modify metadata attribute values on commercial terms lists.
View Metadata Value for Commercial List	User can view metadata attribute values on commercial terms lists.

Creating Commercial Lists

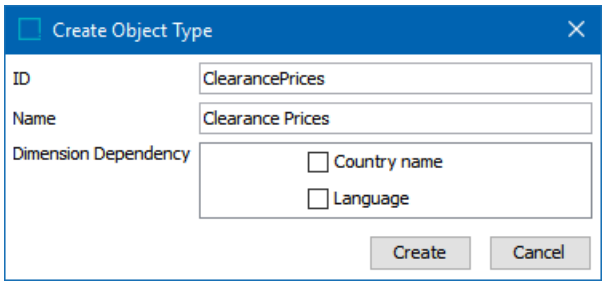
To view commercial data, you must first create a commercial list object type and object. Before you can create a commercial list, the related **object type** must first exist created in System Setup, then a commercial list **object** must be created in your publication.

In most systems, a default commercial list object type will already exist, named **Price** (Price). However, if you need an additional commercial list object type, the following subsection guides you through the process of creating the object type.

To Create an Object Type for Commercial Lists

To create a new commercial list object type, follow these steps.

1. In System Setup, navigate to Object Types & Structures > **Commercial Types** (Term-list user-type root), then right-click and select **New Object Type**.
2. In the **Create Object Type** dialog, populate the following fields:
   - **ID:** Enter an ID for the object type. Example: 'ClearancePrices'
   - **Name:** Enter a name for the object type. Example: 'Clearance Prices'
   - **Dimension Dependency:** Select the relevant dimension dependency (optional)

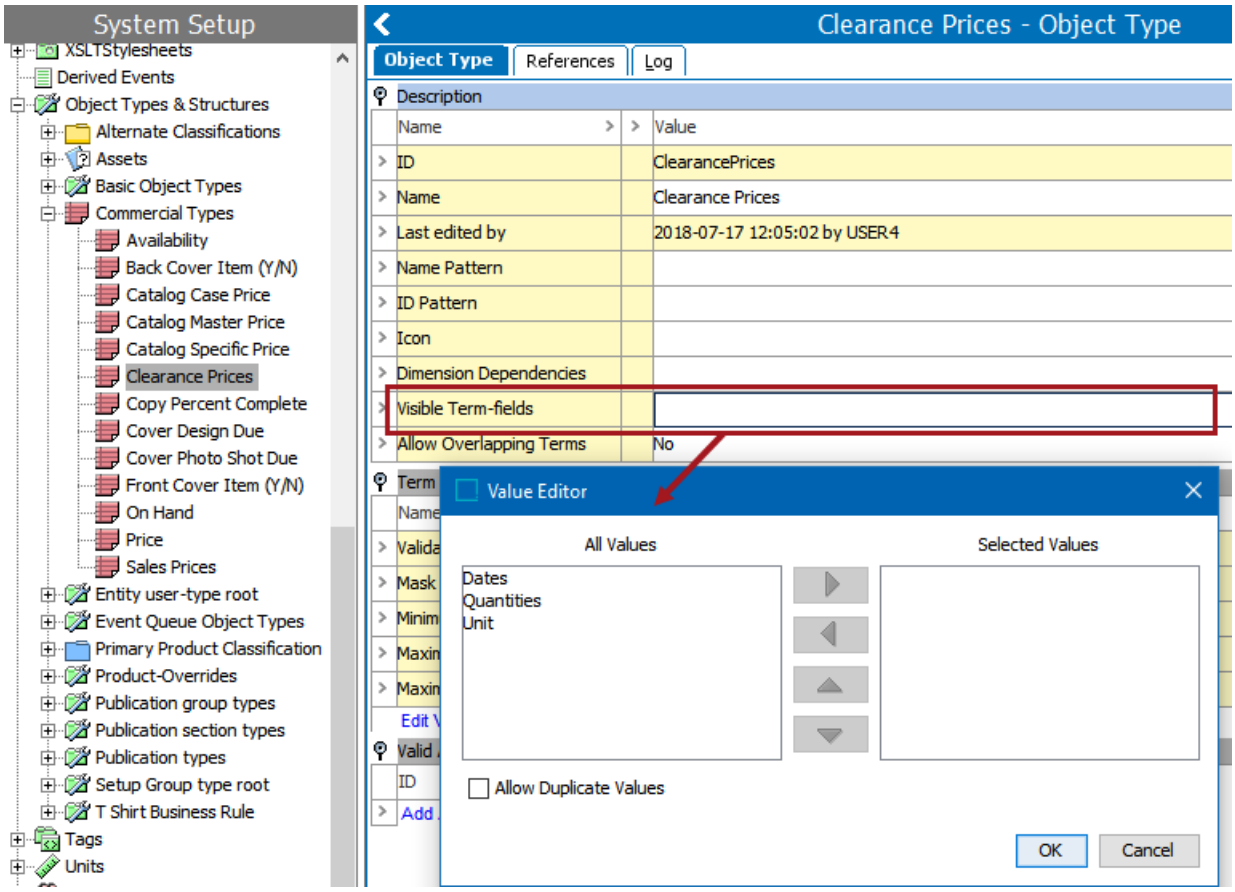


3. Click **Create** to finish creating the commercial list object type.

Configure the Commercial List Object Type

Next, you have to specify the fields that are displayed when commercial data is being viewed either on the commercial list itself or on the commercial tab of a product.

1. With your commercial list object type selected, go to the **Object Type** tab.
2. Though a **Name Pattern** and **ID Pattern** are not required, it is strongly suggested to enter at least an ID Pattern. This makes it easier to create new commercial lists in publications, since commercial lists, even in different publications, cannot use the same ID.
3. Double-click the column next to the **Visible term-fields** field to display the **Value Editor**.



4. Select the relevant option under 'All Values' (Dates, Quantities, Unit), then click the right arrow button to add it to the 'Selected Values' list. Repeat the step to add more values. Or, hold down the Shift or Ctrl key to select multiple values, then add them to the list.
5. Check 'Allow Duplicate Values' if you would like to allow duplicate values in your list, then click **OK** to close the dialog.
6. While still on Object Type tab, select Yes or No from the dropdown list in the **Allow Overlapping Terms** field. The default setting is **No**.

   'No' means that a product can have only one unique price for any given data interval and quantity in the commercial list. However, in some cases it can be useful to allow overlapping terms, so you would select 'Yes.'

   In the travel market, for example, the same holiday package can be offered from Monday to Monday and from Friday to Friday. The weekend then overlaps.

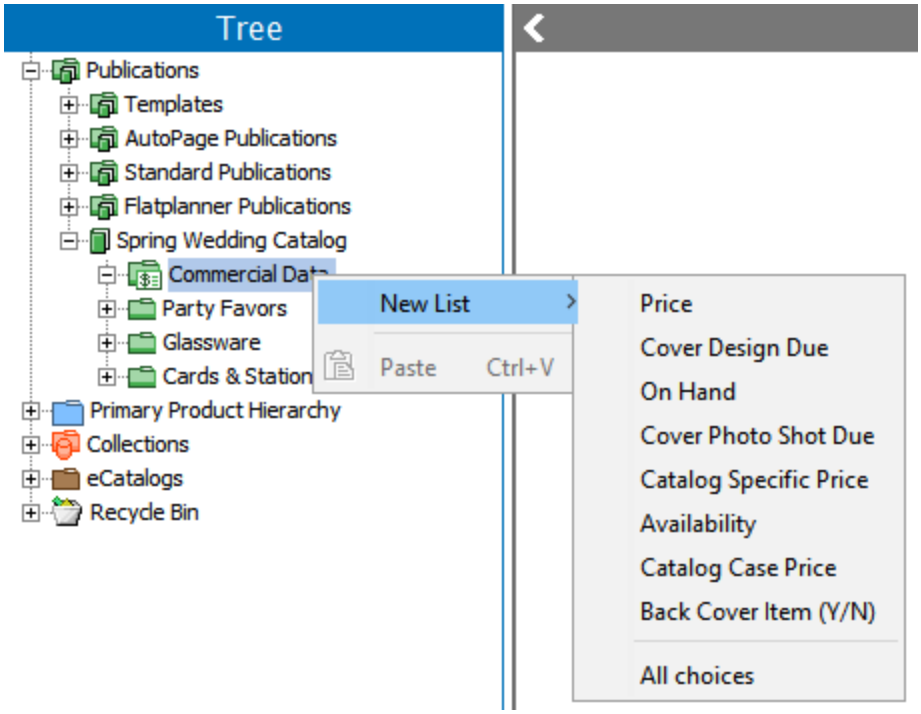
7. Under the **Term Validation** flipper, the validation rule for commercial values can be edited if you want the imported values to adhere to a specific format (e.g., number or regular expression). By default, there is no validation. The validation base rules for commercial values work the same as those for attributes. For more information, see the **Validation Rules** topic in the **System Setup** / **Super User Guide** documentation.

8. Under **Valid Attributes**, add an attribute if you have a need for metadata attribute values to be present on the commercial list. For more information, see the **Attributes Valid for Object Types** topic in the **System Setup** / **Super User Guide** documentation.

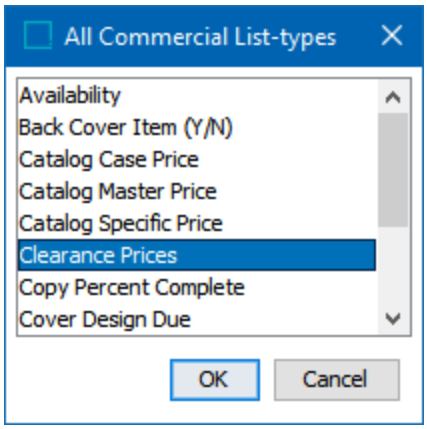
To Create a Commercial List

Once a commercial list object type has been created in System Setup, you can create the commercial list object in your publication.

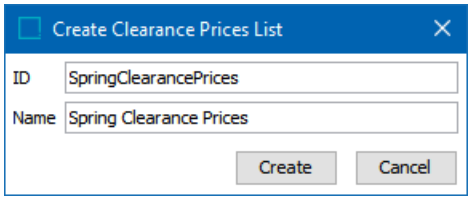
1. In the Tree, navigate to the relevant **publication** in the publication hierarchy. This will be the publication that the commercial terms list should be linked to.
2. Expand the publication, then right-click the Commercial Data folder and select **New List**. A list of eight commercial terms object types displays. **Price** is the most commonly used commercial list object type.



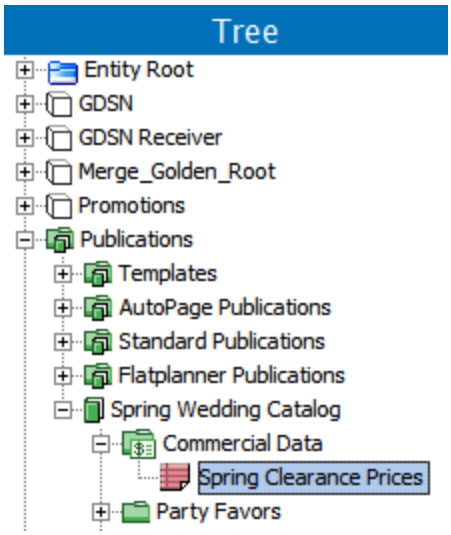
3. If the commercial list object type that you need is not visible in the list, click **All choices** at the bottom of list to display the **All Commercial List-types** dialog. Choose the relevant list type, then click **OK**.



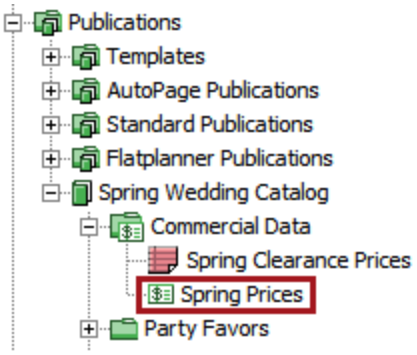
4. In the **Create List** dialog, enter an **ID** and **Name** for the commercial list, then click **Create**. In the below example, the name of the commercial list type ('Clearance Prices') displays in the dialog label ('Create Clearance Prices List').



5. The commercial list is created.



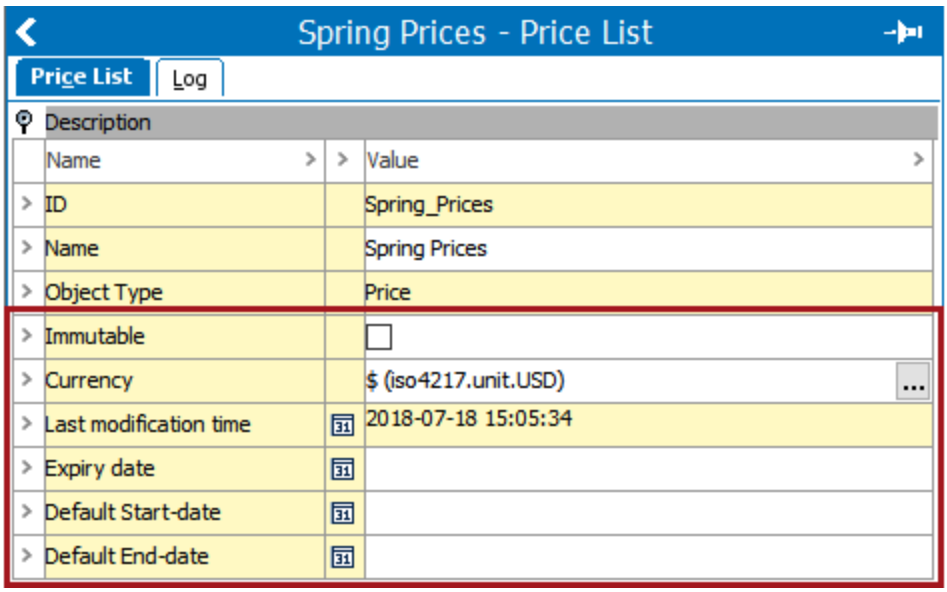
Note: When using the standard **Price** commercial list object type, the commercial list displays with a 'dollar' icon.



After the list is created, the next step is to define the import settings for the list. This involves creating a sample spreadsheet and the creation of an import configuration based on this sheet. See the next section of this guide, **Defining Import Settings for Commercial Data**, for more information.

Additional Configurations for Commercial Lists

A number of additional configurations and metadata options are also available for commercial list objects.



- **Immutable:** When checked, this setting prevents commercial data from being updated.
- **Currency:** Click the ellipsis button (...) to choose a currency unit for the list. This selection can be any unit and does not have to be currency.

> **Note:** This does not place the unit on terms lists values. To have the unit display within terms lists, the unit must be added when defining the import configuration by mapping the values of an Excel column to the 'Unit' aspect of the terms list. See **Defining Import Settings for Commercial Data** for more information on creating import configurations.

- **Last modification time:** Displays the date and time that the list was last modified. This field is non-editable.
- **Expiry date:** Enter an expiration date for the list, or double-click the field to open the Date Picker.

> **Note:** The commercial list will not expire automatically. The date is for administrative purposes only and is not the same as the 'End Date' value that can be defined for individual terms. See **Defining Import Settings for Commercial Data** for more information on the 'End Date' value.

- **Default Start-date** and **Default End-date:** Like Expiry date, these values are for administrative purposes only and are not the same as the 'Start Date' and 'End Date' values defined for individual terms.

Defining Import Settings for Commercial Data

Commercial data terms are imported into commercial lists using standard **Import Manager** functionality. However, unlike standard imports, the import configurations created for commercial data may only be created and saved on **publication** objects. As such, the import process for commercial data must be initiated from publication objects and not from the STEP Workbench menu (i.e., File > Import > Data).

After creating the commercial list object for your publication, the next steps are to create a sample import file, in Excel or CSV format, then define the import settings for importing actual commercial data. The columns in the sample file will be used to map fields in the Import Manager wizard, which will allow the system to later ingest a sheet that contains actual data.

Sample Excel Commercial Data Load Files

The following subsections show examples of commercial data sample import files, one containing price break and quantity information; one containing price break, quantity, unit, start date, and end date information; and the other only containing values information.

Price Example

This example sheet is an Excel file that contains 10 columns and 8 products. Each product has three **prices** with price **breaks** that change based on the **quantity** of the product being sold.

For example, using the first product row shown in the below screenshot (ID = 121171), the price breaks are as follows:

Break No.	Quantity	Price
1	1 - 3	2.79
2	4 - 9	1.79
3	10 - 100	0.89

	A	B	C	D	E	F	G	H	I	J
1	<ID>	Price 1	P1min	P1max	Price 2	P2min	P2max	Price 3	P3min	P3max
2	121171	2.79	1	3	1.79	4	9	0.89	10	100
3	121177	2.99	1	3	2.49	4	9	0.99	10	100
4	121178	2.89	1	3	1.89	4	9	0.99	10	100
5	121179	3.99	1	3	2.79	4	9	0.79	10	100
6	121184	1.99	1	3	0.79	4	9	0.49	10	100
7	121192	17.76	1	3	9.76	4	9	5.76	10	100
8	121193	7.29	1	3	5.49	4	9	2.99	10	100
9	121190	9.99	1	3	5.99	4	9	2.99	10	100

Note: Minimum and Maximum values are required to import prices; Unit, Start Date, and End Date are optional. You must set a minimum and maximum value (even if they are fake values) for each prices. For example, to load three price breaks, load nine columns of data: the price, the minimum, and the maximum for each price.

Prices with Units and Dates

To also import **Unit**, **Start Date**, and **End Date** values, which are optional, a corresponding column for each value must also be present on the sheet. In the below example—which shows columns for 'Price1' only—there is a 'P1Unit,' 'P1StartDate,' and 'P1EndDate' column. Each subsequent price (Price2, Price 3, et al.) will also have its own unit, start date, and end date columns.

Note: When importing **units**, the **STEP ID** of the unit must be used and not the symbol. In the below example, iso4217.unit.USD is the STEP ID for U.S. dollar ($).

	A	B	C	D	E	F	G
1	<ID>	Price1	P1Unit	P1min	P1max	P1StartDate	P1EndDate
2	121171	2.79	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
3	121177	2.99	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
4	121178	2.89	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
5	121179	3.99	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
6	121184	1.99	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
7	121192	17.76	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
8	121193	7.29	iso4217.unit.USD	1	3	9/1/2019	10/31/2019
9	121190	9.99	iso4217.unit.USD	1	3	9/1/2019	10/31/2019

Non-price Example

This example sheet contains 7 columns and 3 products. Though values are present for minimum (P1min) and maximum (P1max) quantities, only the 'Package' and 'Per Case Qty' values are intended to display. I.e., Instead of price values in the commercial list, the values will be 'Tube' and '10' (using the first product row as an example). These values will be mapped to 'Price 1' and 'Price 2' value fields when configuring the import configuration.

The quantity values themselves (P1min and P1max, P2min and P2max) are fake values that only serve to satisfy the commercial list load entry requirements. However, they still need to be appropriate numbers. E.g., the value in P2min cannot be the same or less than P1max, and P2max must be greater than P2min, etc.

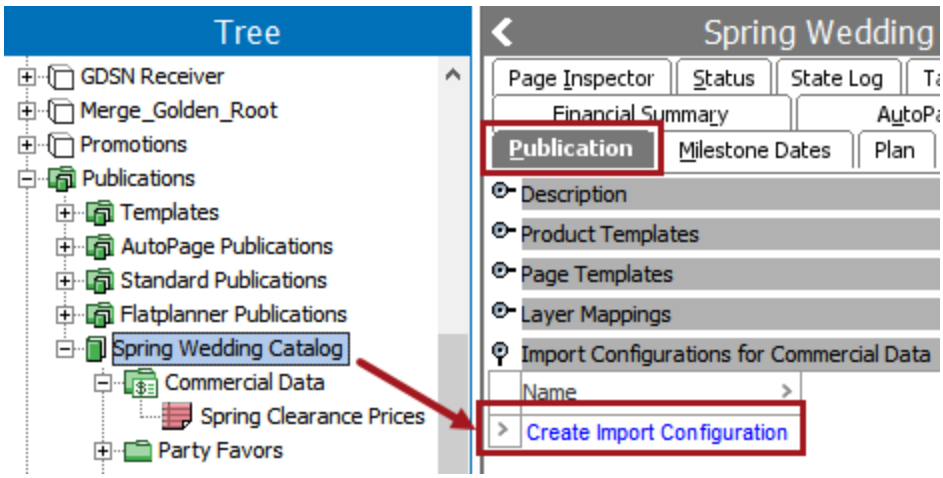
	A	B	C	D	E	F	G
1	ID	Package	P1min	P1max	Per Case Qty	P2min	P2max
2	1234567	Tube	1	3	10	4	9
3	2345678	Jar	1	3	12	4	9
4	3456789	Canister	1	3	24	4	9

Creating an Import Configuration for Commercial Data

The following steps for creating a commercial data import configuration use a sheet that contains columns for all available commercial terms elements: value, unit, quantities, and dates. These steps assume that you have already created a sample file.

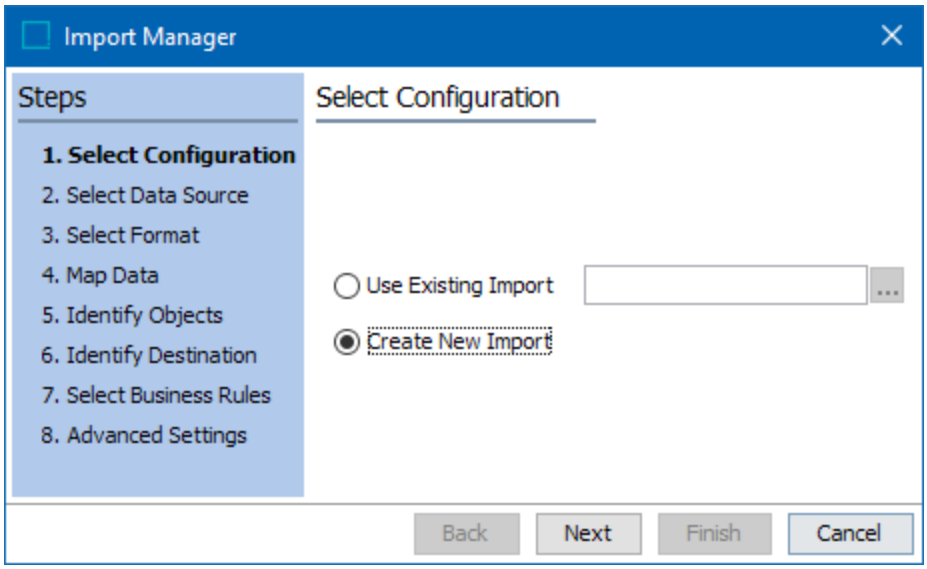
Commercial Data can also be imported via IIEP as defined in the **Importing Commercial Data via IIEP** topic.

1. In the Tree, navigate to and select the relevant **publication** in the publication hierarchy.
2. On the **Publication** tab, expand the 'Import Configurations for Commercial Data' area, then click **Create Import Configuration**.



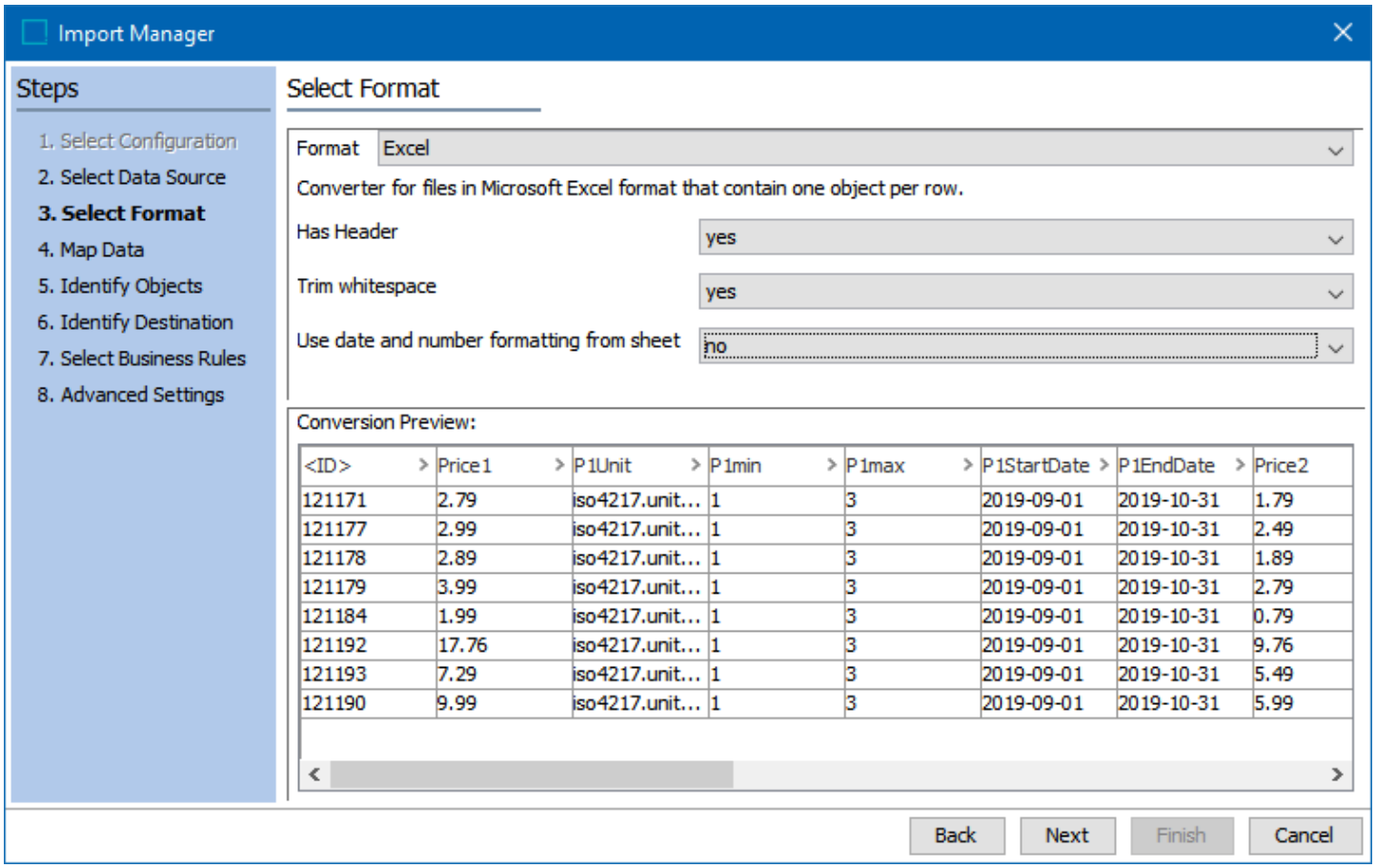
3. The **Import Manager** wizard displays.

Note: All steps of the Import Manager wizard, and the options available for each step, are described in detail in the **Creating a Data Import** section of the **Data Exchange** documentation. The information in this topic only contains detailed descriptions of the steps that are of particular importance to commercial data.



4. On the **Select Configuration** screen, specify whether you want to create a new import configuration or use an existing one. Since these instructions are for how to create a new import configuration, select **Create New Import**.
5. On the **Select Data Source** step screen, select **File**. The data source will always be File for commercial data import configurations.
6. While still on the **Select Data Source** screen, click the ellipsis button (...) next to the **Filename** field and choose the sample upload file, then click **Next**.
7. On the **Select Format** screen, the format will be prepopulated with either Excel or CSV, depending on the format of your sample sheet.
8. Make any additional configurations ('Has Header,' 'Trim whitespace,' 'Use date and number formatting from sheet'), then click **Next**.

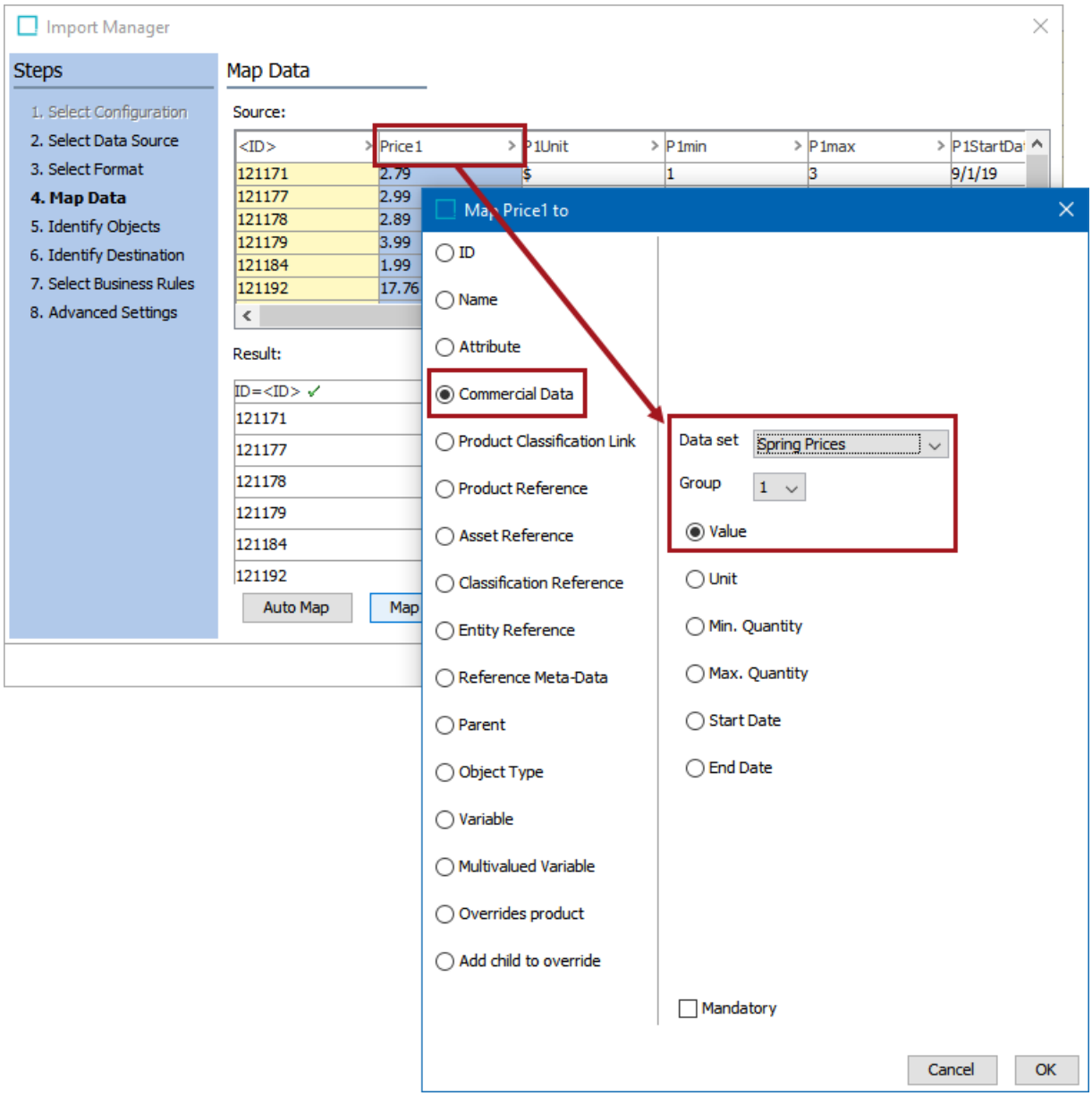
Note: It is strongly recommended to keep the default selection of **no** for **Use date and number formatting from sheet**, especially if importing date values. This ensures that date values are standardized into an ISO format. See the **Excel Format** section of the **Import Manager** documentation for more information.



Mapping Commercial Data in the 'Map Data' Step

In the **Map Data** step, a number of mappings must be specified manually. The 'Auto Map' feature will not work for commercial data mappings, though it can be used to map the ID or Name columns. **ID** is required.

1. To start the mappings, click a source column, then click **Map**. The **Map Column to** dialog displays.
2. Select the column to map, then click **Map**. The **Map to** dialog displays.
3. In this example, the first column has already been mapped to ID; the first price column, 'Price1,' has been selected; and the **Commercial Data** radio button has been selected in the **Map to** dialog.



4. From the **Data Set** dropdown list, select the commercial list to which the data should be mapped. If more than one commercial list has been created for your publication, they will appear in the list in alphabetical order.

> **Note:** Values for multiple commercial data lists may be populated from a single Excel sheet by selecting different lists for different mappings as defined in the **Importing Commercial Data via IIEP Configuration** topic.

5. From the **Group** list, select the preferred quantity break.
6. Choose one of the following options to determine which field of the commercial list that the data from the Excel sheet should be mapped to:

- Select **Value** to map the column to the value field.
- Select **Unit** to map the column to the unit field and have the unit display along with the term value.
- Select **Min. Quantity** to map the column to minimum quantity in the selected group or price break.
- Select **Max. Quantity** to map the column to maximum quantity in the selected group or price break.
- Select **Start Date** to map the column to the start date when the price becomes valid.
- Select **End Date** to map the column to the end date of the selected group or price break.

7. Check the **Mandatory** box if you want rows without a term value to be skipped on import so none of the information that may be related to a product without a specified term value will be imported. Click **OK**.
8. Follow the previous steps until all columns of the sheet are mapped. For example, in this sheet, after mapping the 'Price1' column to Commercial Data > Group: 1 > **Value**, the remaining columns will be mapped as follows:

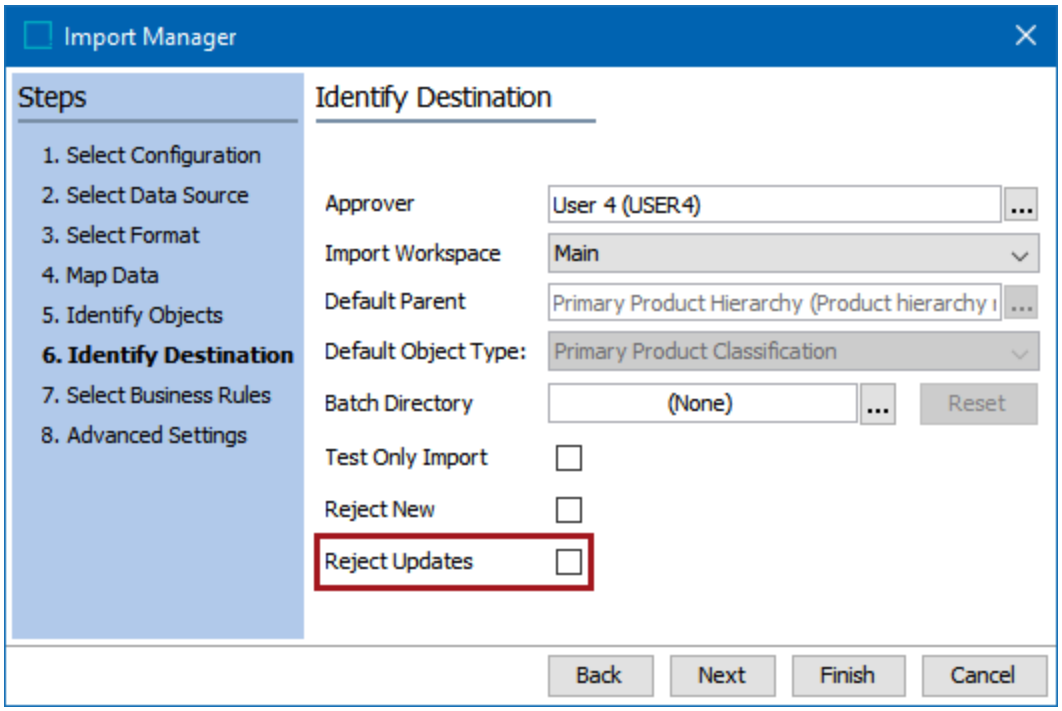
   - The 'P1min' column will be mapped to Commercial Data > Group: 1 > **Min. Quantity**
   - The 'P1max' column will be mapped to Commercial Data > Group: 1 > **Max Quantity**
   - The 'P1Unit' column will be mapped to Commercial Data > Group: 1 > **Unit**
   - The 'P1StartDate' column will be mapped to Commercial Data > Group: 1 > **Start Date**
   - The 'P1EndDate' column will be mapped to Commercial Data > Group: 1 > **End Date**
   - The 'Price2' column will be mapped to Commercial Data > Group: 2 > **Value**, and so forth.

   The remainder of the columns will follow the same pattern. Click **Next** when finished.

Completing the Import Configuration

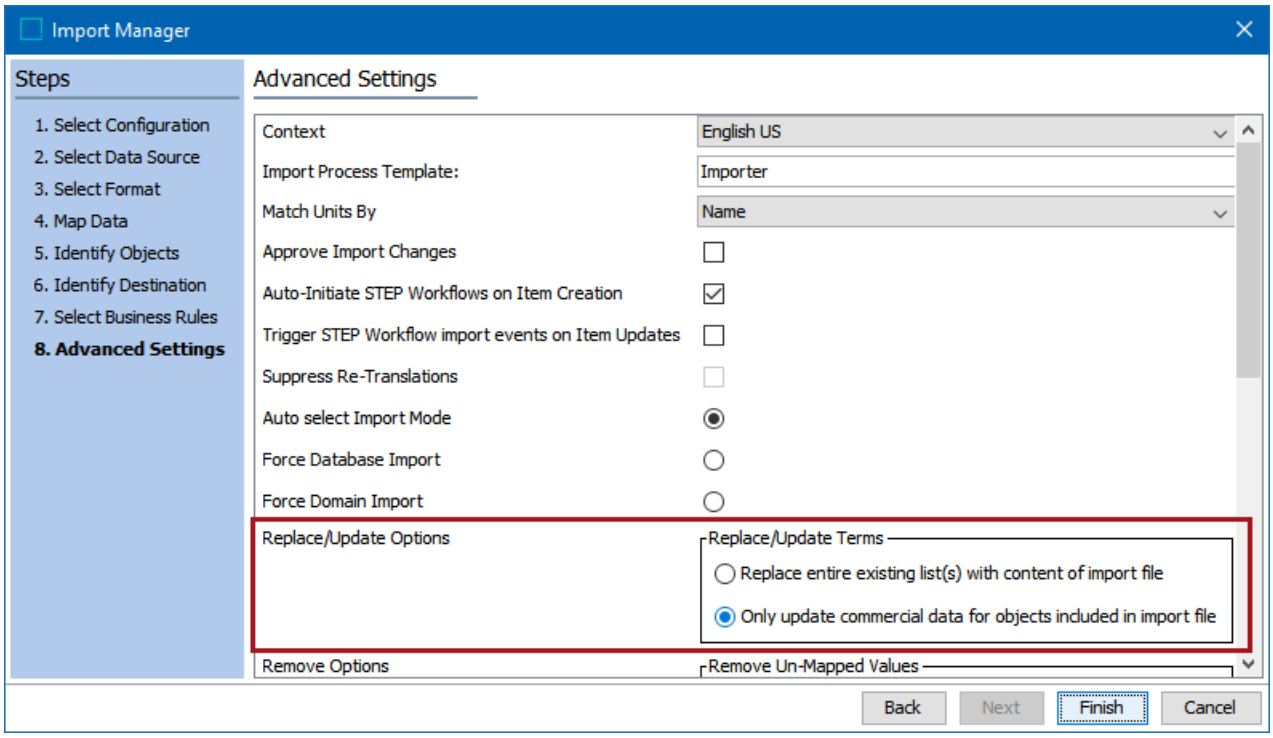
1. On the **Identify Objects** screen, if the products in the source file are not identified as existing products in the system, the 'Match Result' will be 'New.' Click **Next**.
2. On the **Identify Destination** screen, several options are available, which are detailed at length in the **Import Manager - Identify Destination** topic in the **Import Manager** documentation. For the purposes of commercial data imports:

   - **Reject Updates** should be left unchecked, since a setting on the **Advanced Settings** screen of the wizard will control how commercial lists are updated.

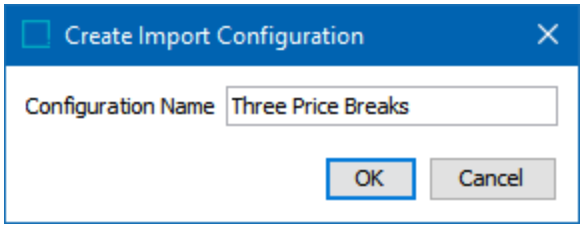


3. On the **Select Business Rules** screen, business rules can be specified to run upon import if required for your business needs. For more details, see the **Import Manager - Select Business Rules** topic in the **Import Manager** documentation. Click **Next**.
4. On the **Advanced Settings** screen, any options can be selected based on your business needs, but the only options relevant to commercial data appear in the **Replace/Update Options** area.
   - To delete all existing content of the commercial list(s) and replace it with the content of the new file, select **Replace entire existing list(s) with content of import file**.
   - To keep the existing content of the commercial list(s) and only replace the commercial data of the product IDs included in the new file, select **Only update commercial data for objects included in import file**.

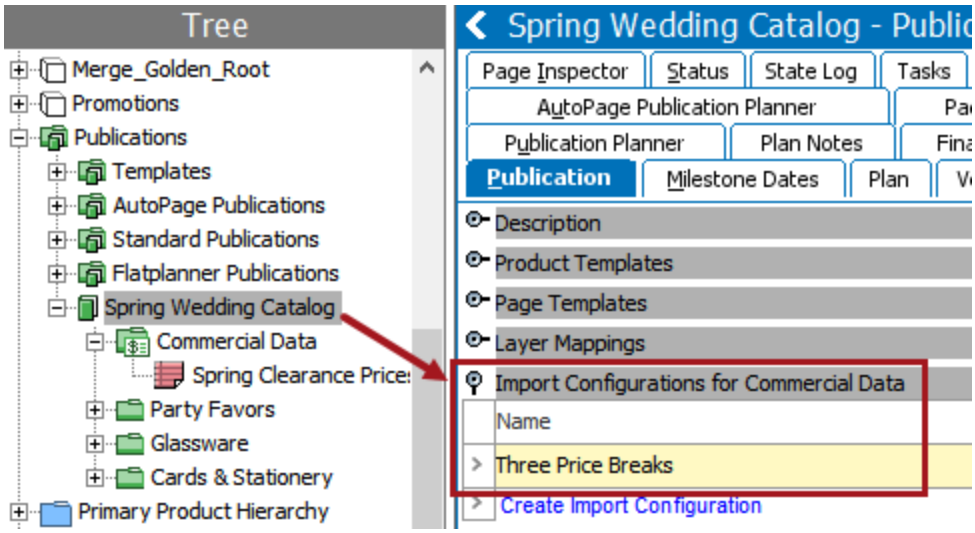
   For more information on all options available on the **Advanced Settings** screen, see the **Import Manager - Advanced Settings** topic in the **Data Exchange** documentation.



5. Click **Finish** to complete the wizard. The **Create Import Configuration** dialog displays.
6. In the **Configuration Name** field, enter a name for the import configuration (e.g., 'Three Price Breaks'), then click **OK**.



7. When you have completed the import configuration process, the configuration is saved to your publication and accessible from the **Publication** tab.

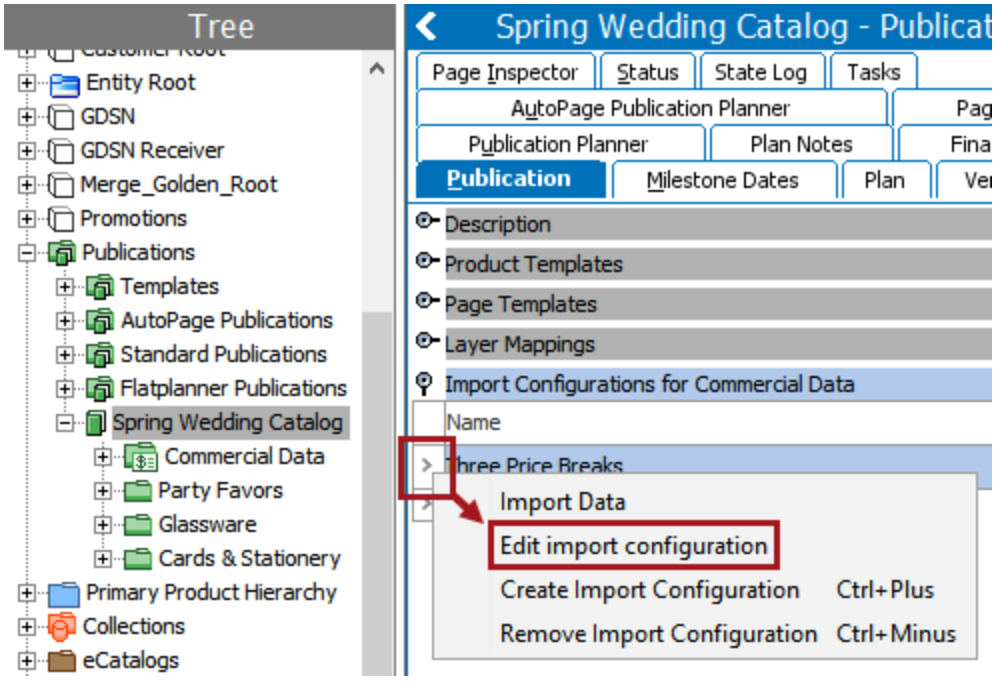


8. Commercial data can now be imported. See the next section of this topic, **Importing Commercial Data**, for details.

Editing a Commercial Data Import Configuration

To make changes to an existing commercial data import configuration, do the following.

1. In the Tree, navigate to, and select, the publication that contains the configuration you want to edit.
2. On the **Publication** tab, right-click on the small arrow to the left of the configuration that you want to edit, then choose **Edit Import Configuration**.



3. The Import Manager wizard displays, starting on the **Select Data Source** screen.
4. Make the desired edits following the same steps listed above for creating a new configuration.
5. To **delete** the configuration, follow steps 1 and 2 above, but select **Remove Import Configuration**.

Removing a Commercial Data Import Configuration

To remove a commercial data import configuration, follow the same initial steps listed in the previous subsection, but select **Remove Import Configuration** instead of 'Edit import configuration.'

Importing Commercial Data Manually

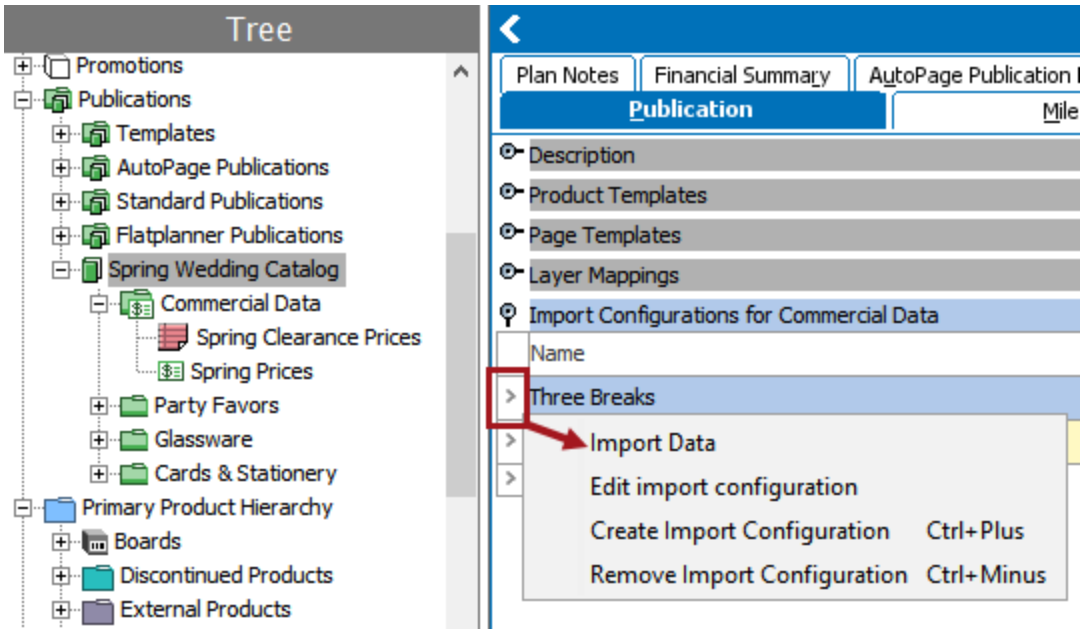
When a commercial list has been created and import settings defined for the list, the commercial data can be imported into the system. Commercial data can be imported manually, or from upstream sources such as an ERP or sales system by using an inbound integration endpoint (IIEP).

This topic details how to import commercial data manually in the workbench.

For information on importing commercial data using an IIEP, see the **Importing Commercial Data via IIEP** section of the **Data Exchange** documentation. For information on importing commercial data in the Web UI, see **Working with Commercial Data in the Publishing Web UI** in the **Web User Interfaces** documentation.

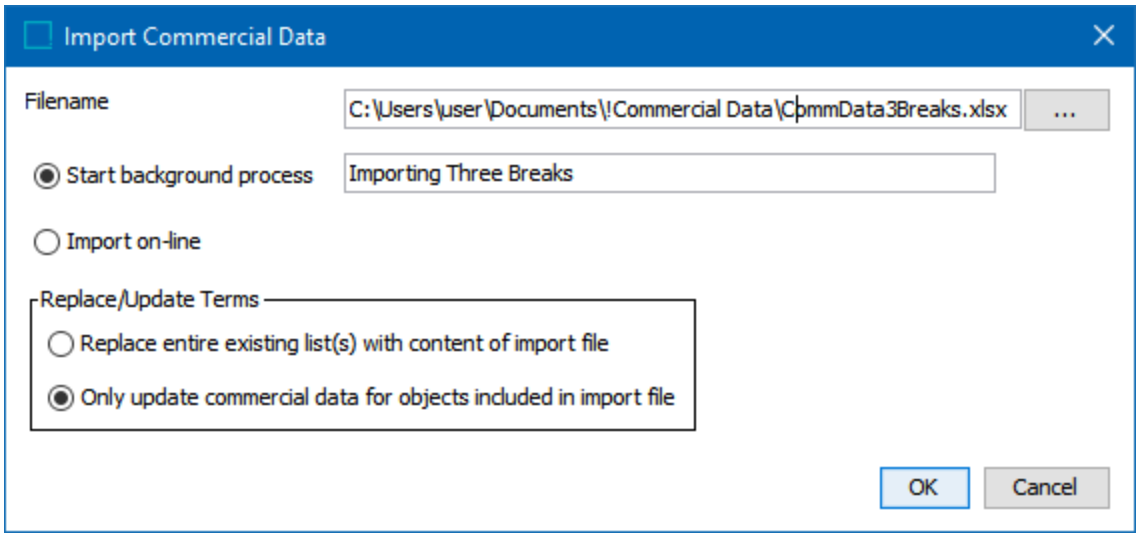
To import commercial data manually:

1. In the Tree, locate and select the relevant **publication** in the publication hierarchy, then click the **Publication** tab.
2. In the 'Import Configurations for Commercial Data' area, right-click the arrow next the relevant import configuration, then choose **Import Data**.



3. In the **Import Commercial Data** dialog, click the ellipsis button (...) next to **Filename**, then navigate to and select the file you want to import.

> **Note:** This file must match the format of the file saved in the import configuration.



4. In the **Replace/Update Terms** area, select one of the following options:
   - To delete all existing content of the commercial list(s) and replace it with the content of the new file, select **Replace entire existing list(s) with content of import file**.
   - To keep the existing content of the commercial list(s) and only replace the commercial data of the product IDs included in the new file, select **Only update commercial data for objects included in import file**.

   The choice you made when defining the import configuration on the Advanced Settings screen of the Import Manager wizard will be set as default, but you can override this option by selecting the other option.

   Note: If **Immutable** has been checked on the terms list object, values cannot be updated regardless of what option is chosen. See **Creating Commercial Lists** for more information.

5. Select **Import on-line** option if you want the process to run and show the result online instead of going to a background process. Once the process completes, the Import Report window will show the complete report.
6. Click **OK**.

To **view** the imported data, use one of the methods outlined in the **Viewing Commercial Data** topic.

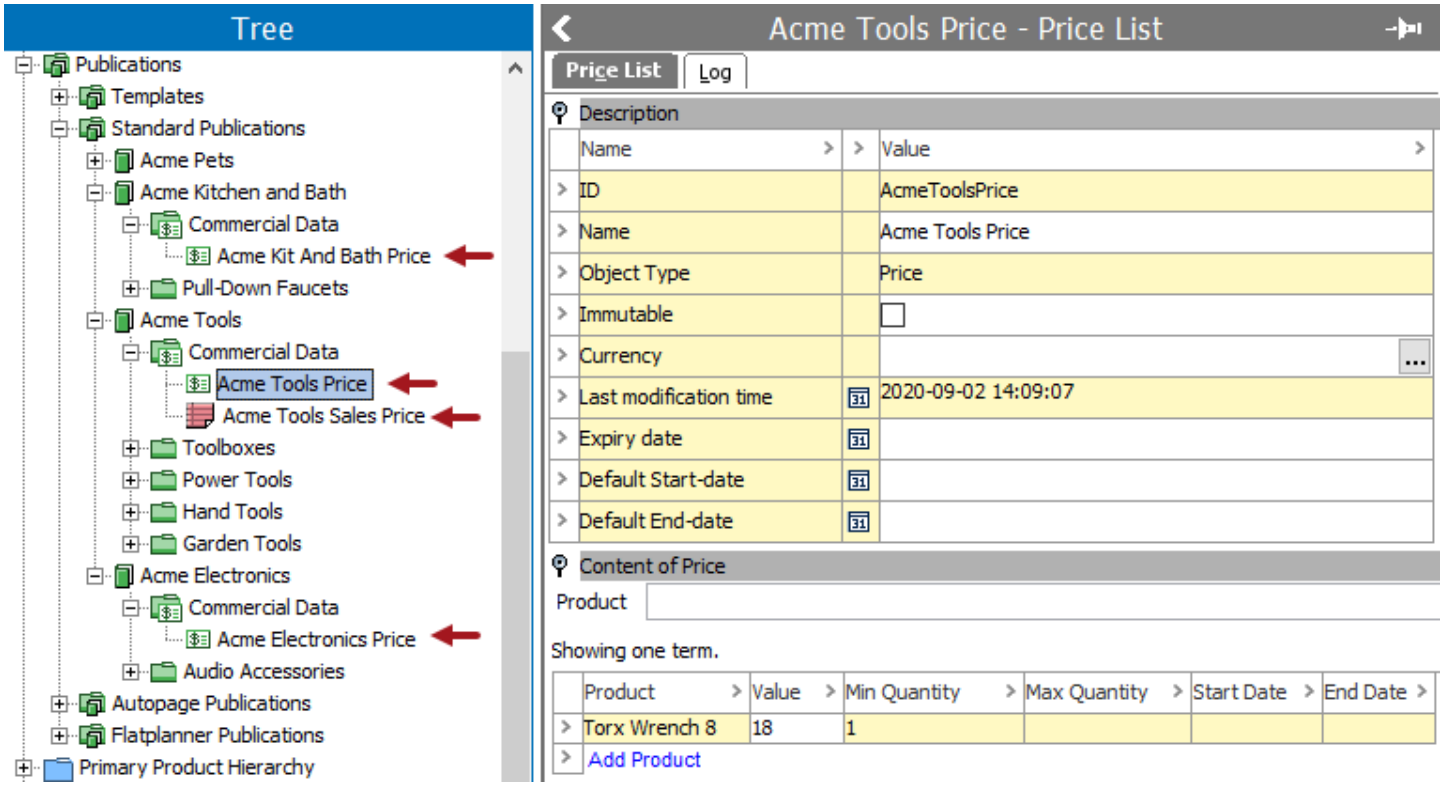
Importing Commercial Data via IIEP

When a commercial pricing list is saved as a single Excel sheet or CSV file but is valid for multiple publications, an inbound integration endpoint (IIEP) can be used to import pricing changes to the mapped publications. For steps to configure this type of IIEP, see the **Importing Commercial Data via IIEP Configuration** topic.

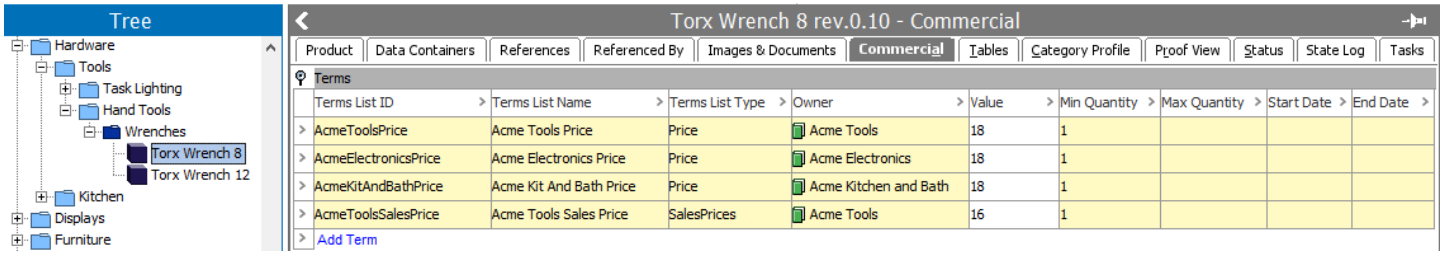
For information on importing commercial data manually, see the **Importing Commercial Data Manually** topic. For information on importing commercial data in the Web UI, see **Working with Commercial Data in the Publishing Web UI** in the **Web User Interfaces** documentation.

Example

The following sample data includes the multiple commercial data price objects highlighted below.



The same product is included on each terms list as shown on the Commercial tab of the product editor.

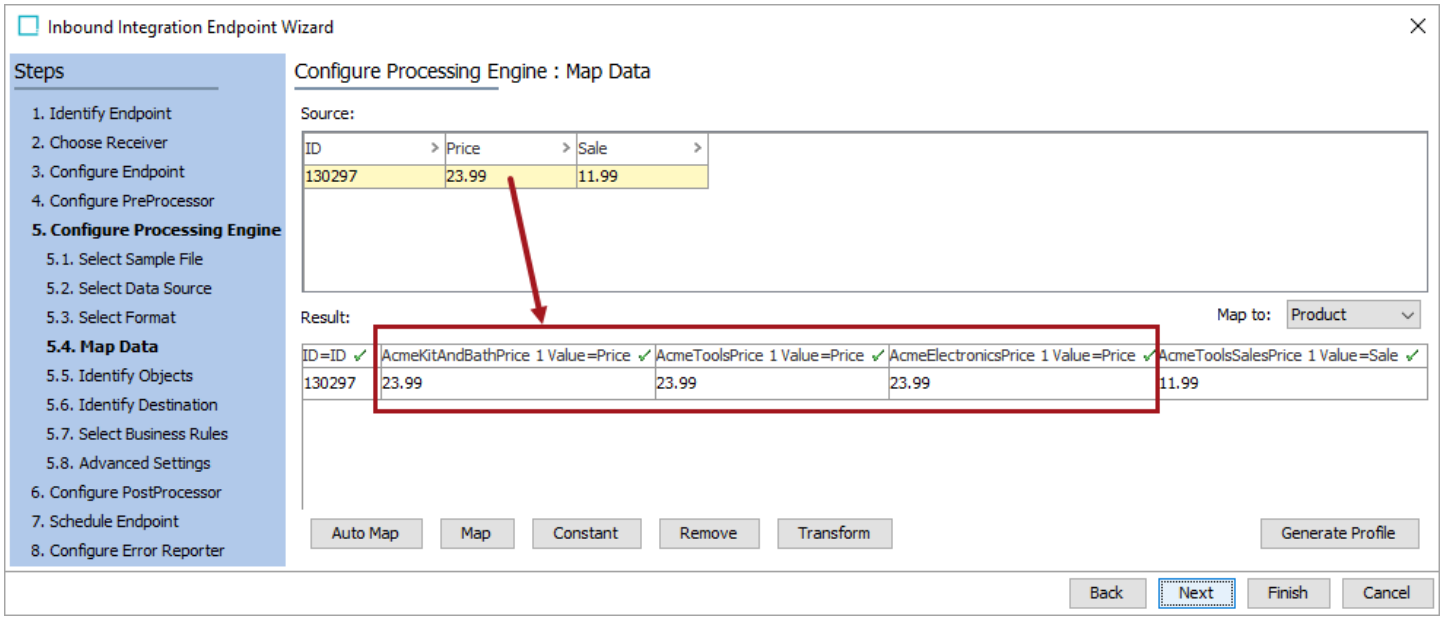


The following Excel spreadsheet contains a price value and a sale value for the product.

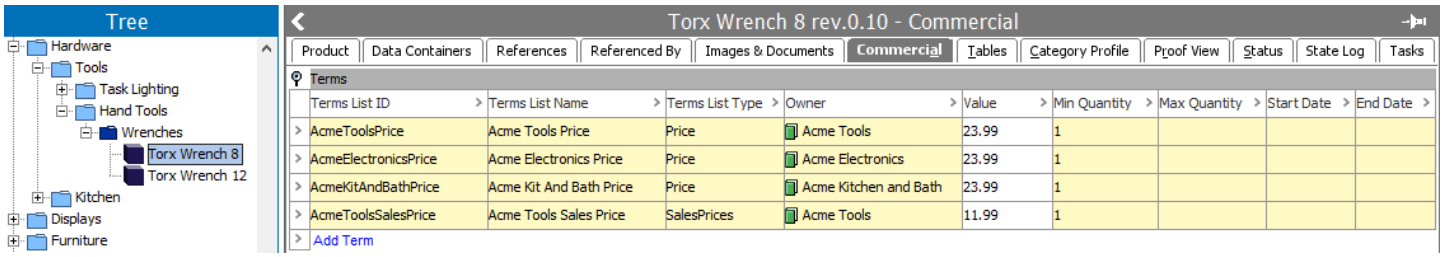
	A	B	C
1	ID	Price	Sale
2	130297	23.99	11.99

In the IIEP configuration, the final mapping for the sample file is shown below:

- The ID column is mapped once.
- The price column is mapped to multiple times because the product is included in multiple commercial lists.
- The sale column is mapped only once because it should be updated in only one commercial list.



Processing the Excel file through the configured IIEP updates the price or sale value for each mapped object type. Results for the object with multiple Terms Lists can be observed in the Tree editor as shown below.


Tree
Hardware
Tools
Task Lighting
Hand Tools
Wrenches
Torx Wrench 8
Torx Wrench 12
Kitchen
Displays
Furniture
Torx Wrench 8 rev.0.10 - Commercial
Product
Data Containers
References
Referenced By
Images & Documents
Commercial
Tables
Category Profile
Proof View
Status
State Log
Tasks
Terms
Terms List ID
Terms List Name
Terms List Type
Owner
Value
Min Quantity
Max Quantity
Start Date
End Date
AcmeToolsPrice
Acme Tools Price
Price
Acme Tools
23.99
1
AcmeElectronicsPrice
Acme Electronics Price
Price
Acme Electronics
23.99
1
AcmeKitAndBathPrice
Acme Kit And Bath Price
Price
Acme Kitchen and Bath
23.99
1
AcmeToolsSalesPrice
Acme Tools Sales Price
SalesPrices
Acme Tools
11.99
1
Add Term

Importing Commercial Data via IIEP Configuration

When a commercial pricing list is saved as a single Excel sheet or CSV file but is valid for multiple publications, the following steps define how to import pricing changes via an inbound integration endpoint (IIEP) to update the mapped publications. For an example of this type of IIEP, see the **Importing Commercial Data via IIEP** topic.

For information on importing commercial data manually, see the **Importing Commercial Data Manually** topic. For information on importing commercial data in the Web UI, see **Working with Commercial Data in the Publishing Web UI** in the **Web User Interfaces** documentation.

Prerequisites

The following prerequisites ensure successful completion of the Configuration steps:

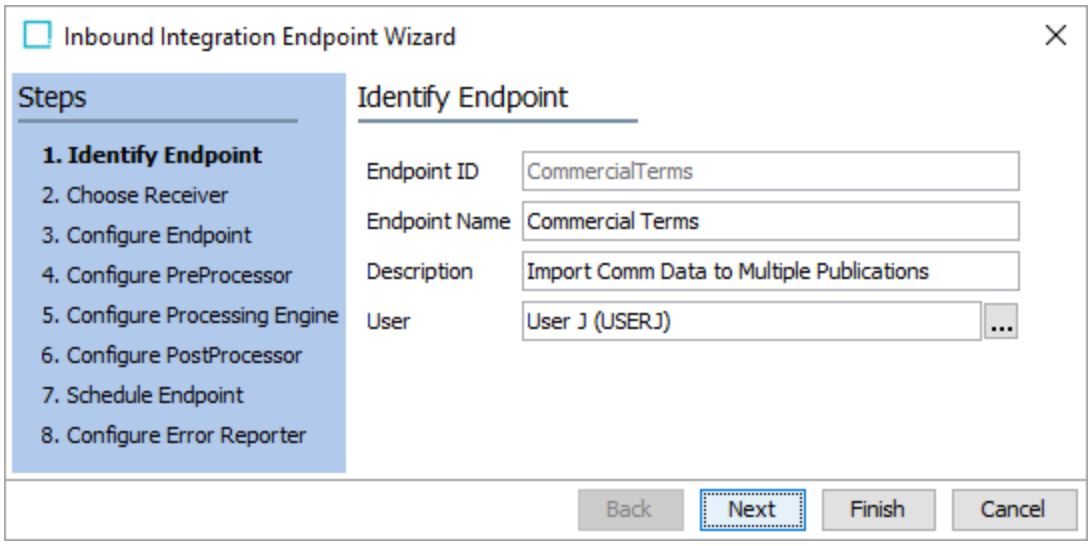
1. Identify the Commercial Data objects that need to be updated via files that will be processed by the IIEP.
2. Identify the hotfolder location for import files.
3. Verify an import file that includes the product ID in addition to the commercial data that should be modified. This file will be used as the IIEP Sample File.

Configuration

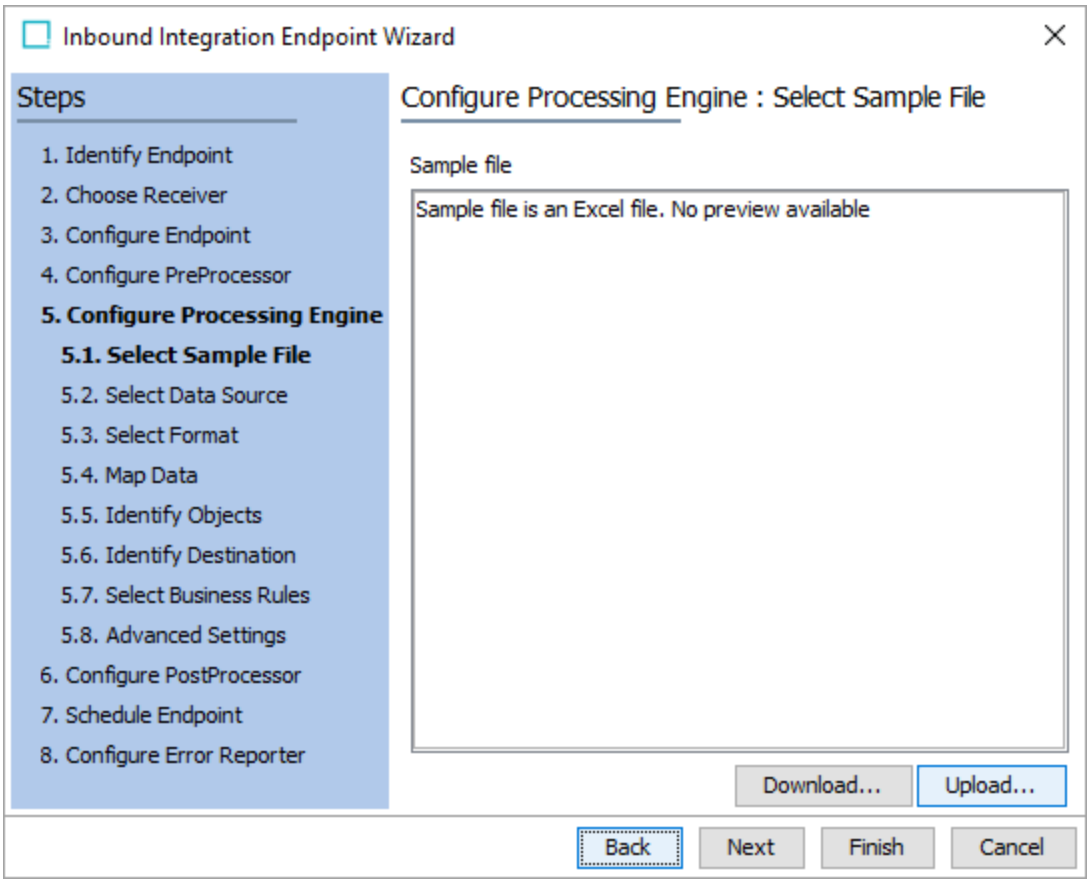
The following steps define how to configure an IIEP for importing commercial data to update multiple objects.

For additional information on IIEP options not defined in this topic, see the **Creating an Inbound Integration Endpoint** topic in the **Data Exchange** documentation. Unless otherwise noted, the referenced topics below are in the **Data Exchange** documentation.

1. On the System Setup tab, create a new inbound integration endpoint to display the Inbound Integration Endpoint Wizard.
2. On the Identify Endpoint step, add an ID, Name, and User. The Description parameter is not required but can be added to for Click the **Next** button. See the **IIEP - Identify Endpoint** topic.



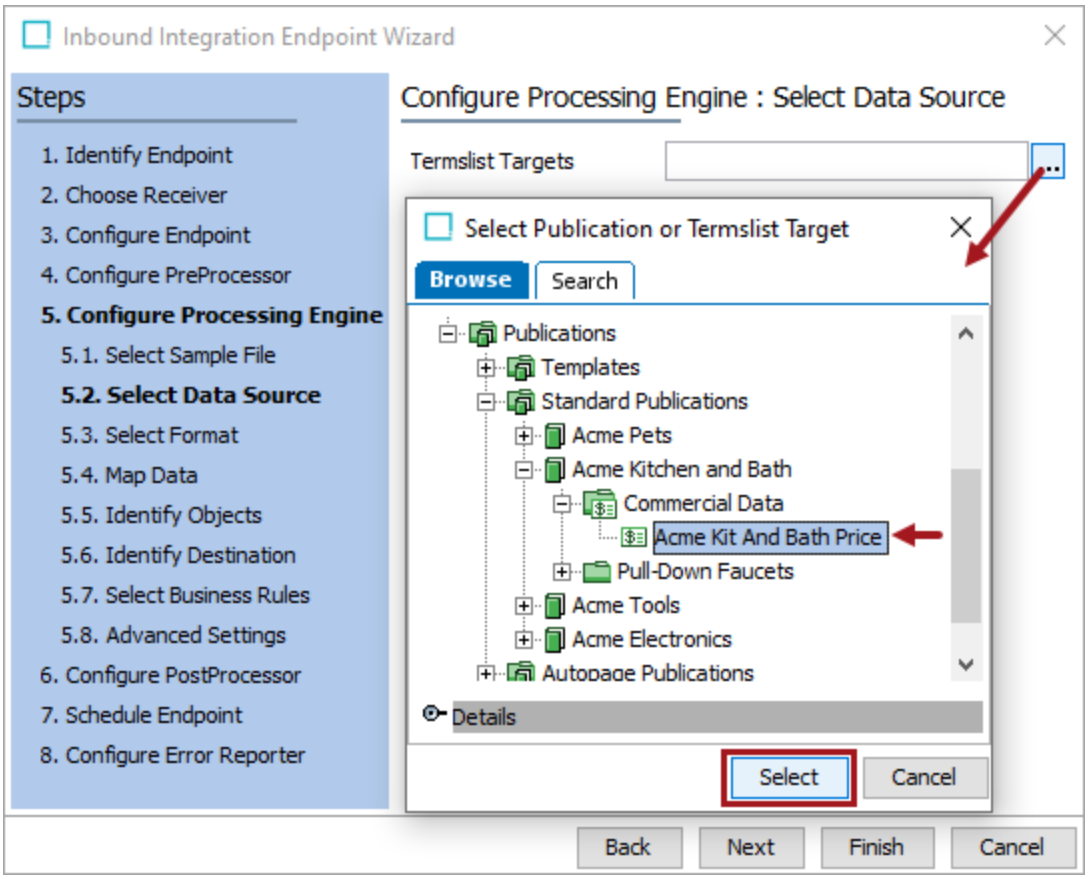
3. Make necessary selections on each of the following steps and click the **Next** button to proceed:
   - Set Configure Receiver to **Hotfolder Receiver**. See the **IIEP - Choose Receiver** topic.
   - Set Configure Endpoint to **STEP Importer**. See the **IIEP - Configure Endpoint** topic.
   - Leave Configure PreProcessor set to defaults. See the **IIEP - Configure PreProcessor** topic.
4. On the Configure Processing Engine step, complete the steps below. See the **IIEP - Configure STEP Importer Processing Engine** topic.
   - On the Select Sample File step, click the **Upload** button and choose the sample import file identified in the **Prerequisites** section above. Click the **Next** button.



Note: The next steps will be repeated for each commercial data terms list object type to be updated.

- On the Select Data Source step, for the **Termslist Targets** parameter, click the ellipsis button (...) and select a commercial data price list object.

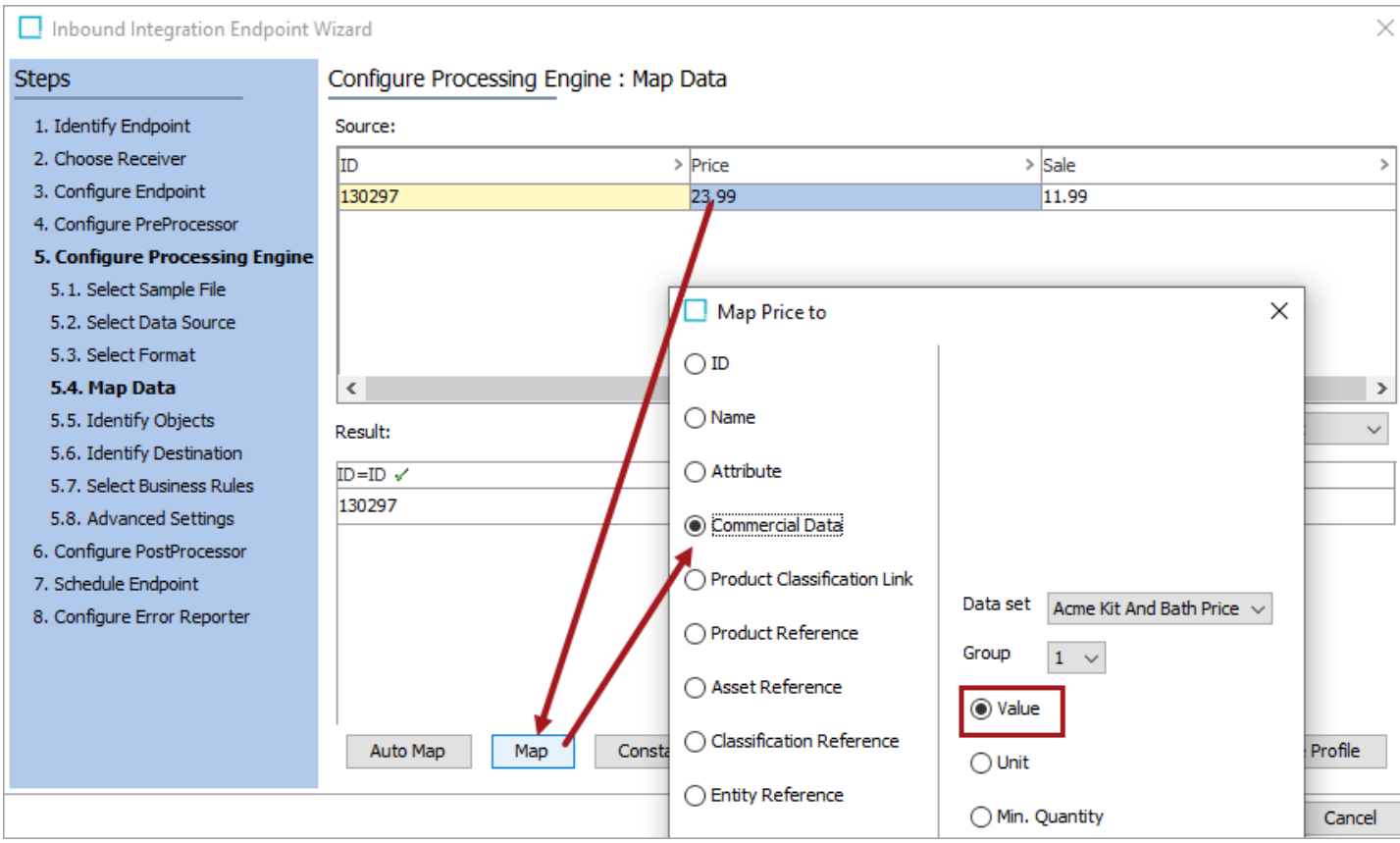
  Click the **Select** button to display the price list as the target data source and click the **Next** button.



- On the Select Format step, select the format of the uploaded file. Update the other parameters as needed. Click the **Next** button. See the **Excel Format** topic or the **CSV Format** topic.
- On the Map Data step, select a Source column and click the **Map** button.

> **Note:** ID should only be mapped on the first pass. Other columns that contain data to be updated should be mapped once for each of the selected terms list targets.

On the 'Map {source column name} to' dialog, select the **Commercial Data** radio button as shown in the image below.



Below the 'Data set' parameter dropdown, choose the radio button for the type of data being imported and click the **OK** button to close the 'Map {source column name} to' dialog.

- If additional data should be mapped for the current Termslist Target, repeat this step.
- If all data for the current Termslist Target is mapped, click the **Next** button.

  Additional instructions are included in the **Mapping the Same Column Multiple Times** section of the **Inbound Map Data - Map** topic and in the **Mapping Commercial Data in the 'Map Data' Step** section of the **Defining Import Settings for Commercial Data** topic.

- On the Identify Objects step, verify the Result section. See the **Import Manager - Identify Objects** topic.
  - If additional Termslist Targets need to be mapped, click the **Back** button repeatedly to return to the Select Data Source step. Repeat the Select Data Source steps outlined above for the next target.
  - If all Termslist Targets have been mapped, click the **Next** button.

5. Make selections on each of the following steps and click the **Next** button to proceed:

- On the Identify Destination step, check the **Reject New** checkbox since new products should not be created via commercial list updates. See the **Import Manager - Identify Destination** topic.
- Set the Select Business Rules step as necessary. See the **Import Manager - Select Business Rules** topic.
- Set the Advanced Setting step as necessary. See the **Import Manager - Advanced Settings** topic.

- Set the Schedule Endpoint step as necessary. See the **IIEP - Schedule Endpoint** topic.
- Set the Configure Error Reporter step as necessary. See the **IIEP - Configure Error Reporter** topic.

6. Click the **Finish** button.
7. With the import file in the hotfolder, enable and invoke the IIEP to process the data. See the **Running an Inbound Integration Endpoint** topic.

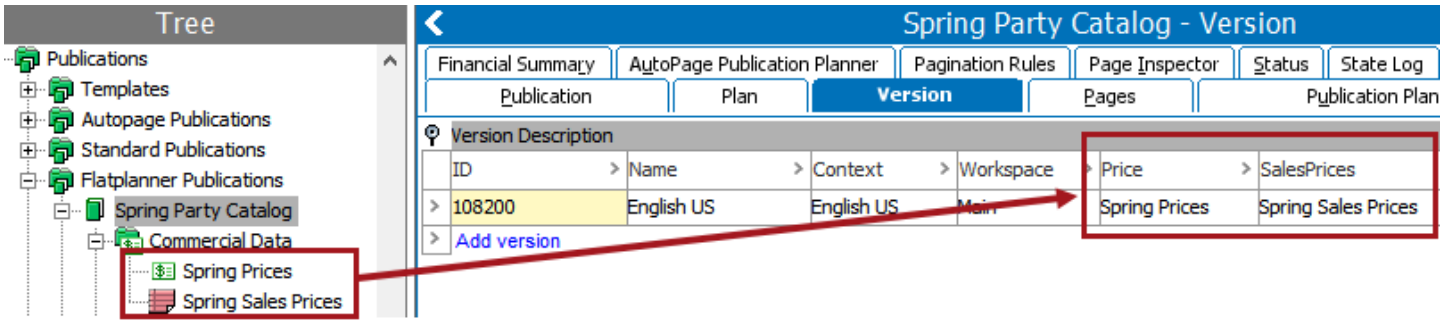
Mapping Commercial Lists to Publication Versions

Commercial data terms **lists** are stored in publications. In turn, these lists are mapped to publication **versions** within the publication. A publication version can be mapped to multiple commercial lists.

Note: Terms lists must be mapped to the version before commercial data can be mounted onto InDesign pages, viewed in tables, or visible in a Flatplanner Basket, Sticker Book, Financial Summary, or Financial Report.

Follow these steps to map commercial data to your publication version.

1. In the Tree, open the **Publication** hierarchy.
2. Select the **Publication** and click the **Version** tab.
3. Each commercial list available to the publication will display under Version Description, e.g., 'Price' or 'SalesPrices.'
4. Click the dropdown list under the list that you want to map, then select a commercial list. In the below example, the list 'Spring Prices' has been mapped to 'Price' and 'Spring Sales Prices' has been mapped to 'SalesPrices.'



Viewing Commercial Data

After importing commercial data, the data can be viewed in the following locations in STEP Workbench:

- Commercial list
- Product
- Flatplanner Basket
- Flatplanner Financial Summary
- Flatplanner Financial Report
- Flatplanner Sticker Book view

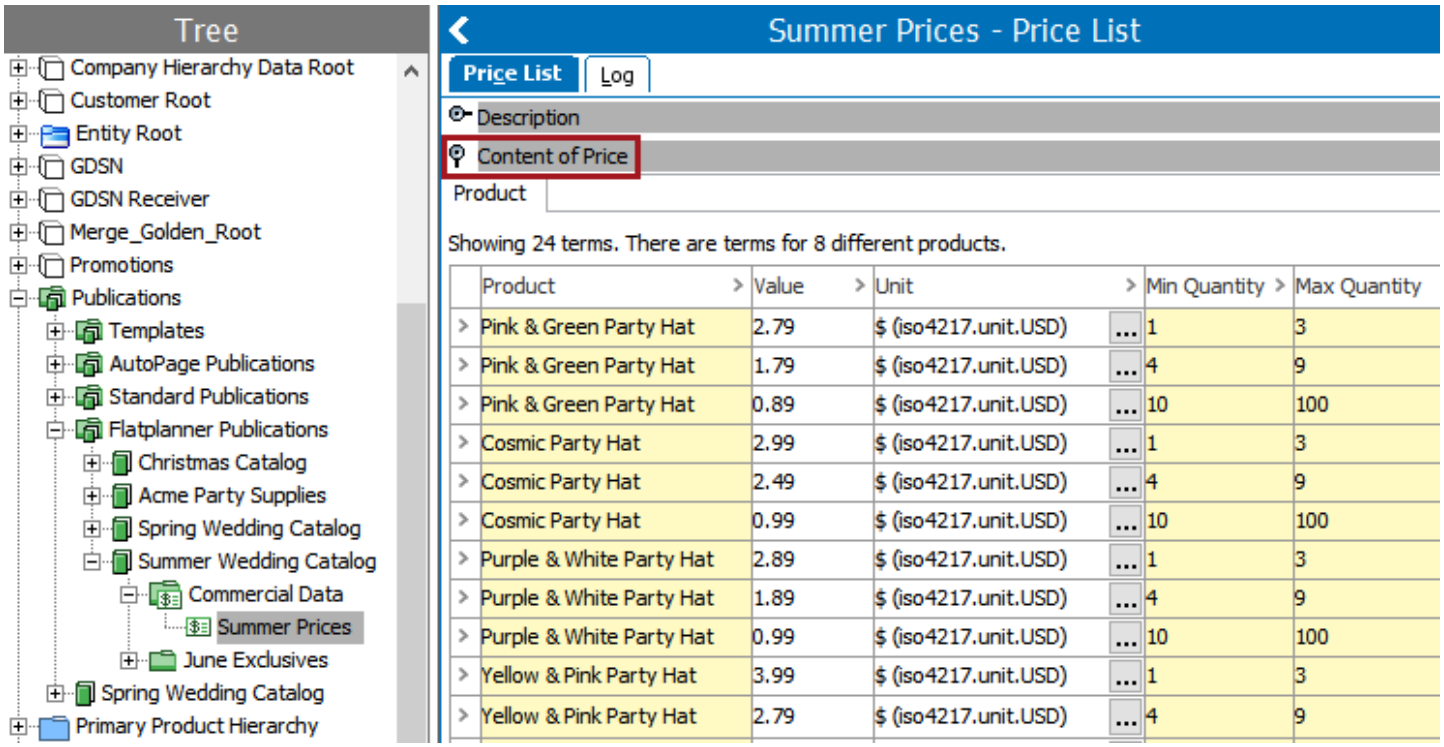
Note: To view commercial data in Flatplanner locations, a commercial data column must first be added to the views and the commercial list must be mapped to the relevant publication version. For information on editing Flatplanner views, see the **Views** section of the **Flatplanner** documentation.

For information on viewing commercial data in the Web UI, see the **Working with Commercial Data in the Publishing Web UI** topic in the **Web User Interfaces / Web UI Setup and User Guide** documentation.

View Commercial Data from a Commercial List

Follow these steps to view commercial data from a commercial list. This method displays all terms in the selected list.

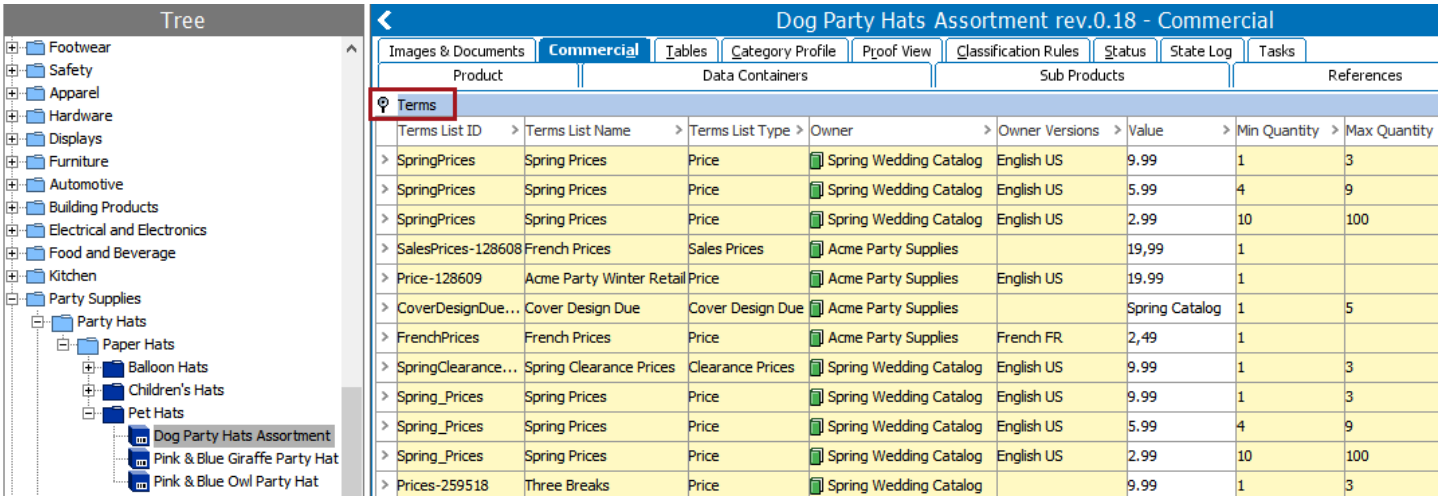
1. Navigate to the relevant **publication** In the Tree, then expand the publication and expand the **Commercial Data** folder.
2. Select the relevant commercial list, then click on the **Price List** tab.
3. Expand the **Content of** section to view the content of the list.



View Commercial Data from a Product

Follow these steps to view commercial data from a product. In addition to the terms values, this method displays all publications and eCatalogs in which the product is included in a terms list. For more information on eCatalogs, see the **eCatalogs** section of the STEP Online Help.

1. In the **Tree**, navigate to and select the relevant product.
2. On the **Commercial** tab, expand the **Terms** area. The content of the lists related to the product is displayed.



Viewing Commercial Data in Flatplanner

Commercial data information can be viewed in the following locations for publications created using the **Flatplanner** component:

- Flatplanner Basket
- Flatplanner Financial Summary
- Flatplanner Financial Report
- Flatplanner Sticker Book view

Before the data can be viewed, the following conditions must be met:

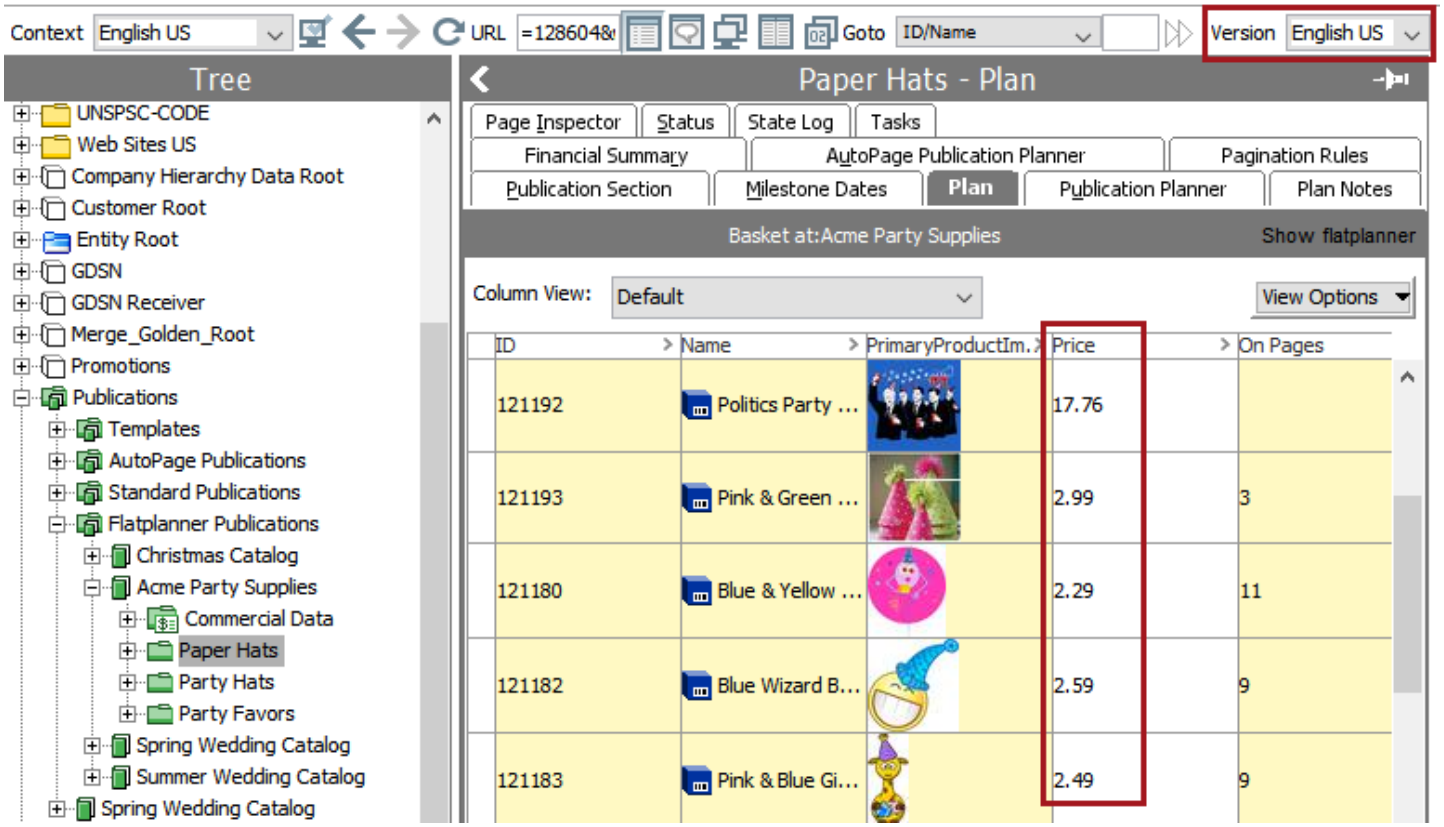
- The commercial terms list(s) must be mapped to a publication **version**. See the **Mapping Commercial Lists to Publication Versions** topic for more information.
- The relevant **views** must be configured to display commercial data. For more information on Flatplanner views, see the **Views** topic in the **Flatplanner** documentation.

For general information about the Flatplanner component, see the **Flatplanner** section of the **STEP Publisher (InDesign)** documentation.

View Commercial Data in the Basket

Commercial data for products can be viewed from the Flatplanner basket by following these steps:

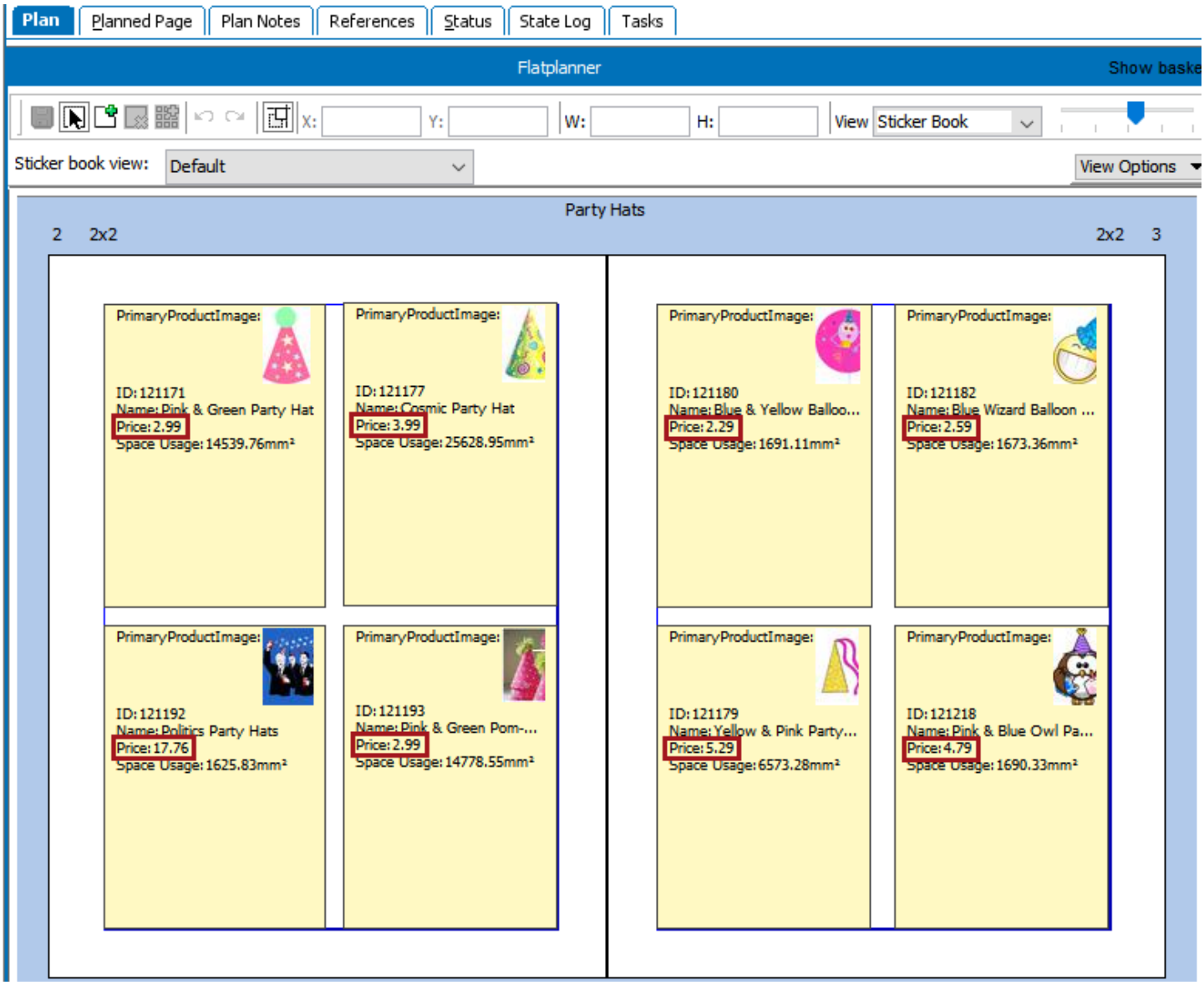
1. In the **Tree**, navigate to and select the relevant publication, section, or planned page spread.
2. Click on the **Plan** tab, then click on the **Show basket** link in the upper right corner of the Flatplanner pane.
3. Ensure that you have selected the relevant **Version** from the dropdown list in the upper right corner of the STEP toolbar. The terms that display will be those included in the terms list(s) that have been mapped to the selected version. You can toggle the version to view commercial data that is linked to different versions.
4. The commercial terms values display in the associated commercial data column in the basket.



View Commercial Data from the Sticker Book View

When planning a page or reviewing existing pages, you can use the **Sticker Book** view to view the commercial data for each product on the planned page. To view commercial data in the sticker book, follow these steps:

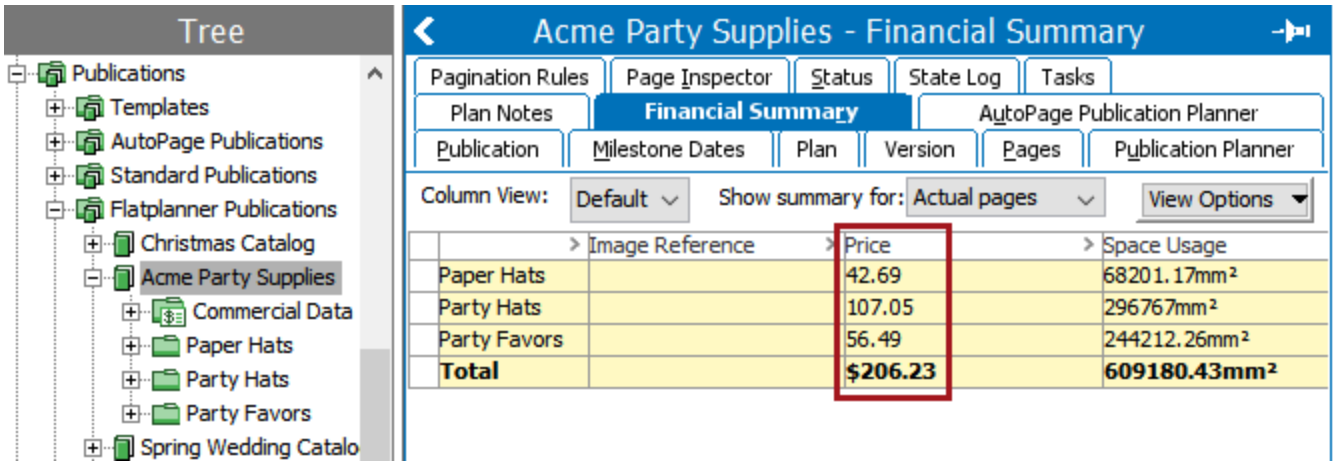
1. In the **Tree**, navigate to and select the relevant publication, section, or planned page spread.
2. Click on the **Plan** tab, then select **Sticker Book** from the 'View' dropdown.
3. Ensure that you have selected the relevant **Version** from the dropdown list in the upper right corner of the STEP toolbar. The terms that display will be those included in the terms list(s) that have been mapped to the selected version. You can toggle the version to view commercial data that is linked to different versions.
4. The commercial data values will display in the locations configured in your Sticker Book view options.



View Commercial Data in a Financial Summary

Commercial data information from products in baskets, on planned pages, and on actual pages can be viewed from the **Financial Summary** tab, which is available when a publication or section is selected in a Flatplanner publication.

If viewing the Financial Summary from the publication level, each row contains section-level data. If viewed from the section level, each row contains page-level data. The below screenshot shows a Financial Summary as viewed from a publication with three sections.



Considerations for the Financial Summary

- At least one commercial data column(s) must be added to the Financial Summary **view** in order to view the commercial data. See the **Views** topic in the **Flatplanner** documentation for information on how to edit the view.
- Commercial data values must contain numeric values *only* to be visible on the Financial Summary tab. Values that contain other characters, such as a dollar sign, will not display. E.g., the value must be 2.73 and not $2.73, otherwise it will display as 0. However, the values will be included in the extracted **Financial Report**.

View Commercial Data in a Financial Report

Commercial data information from products can be viewed by pulling a **Financial Report** spreadsheet from a Flatplanner publication or section. The information can be viewed for products in the basket, on planned pages, and on actual pages.

The following screenshot shows a Financial Report extracted from a publication section, with commercial information for the mounted products on two Actual Pages.

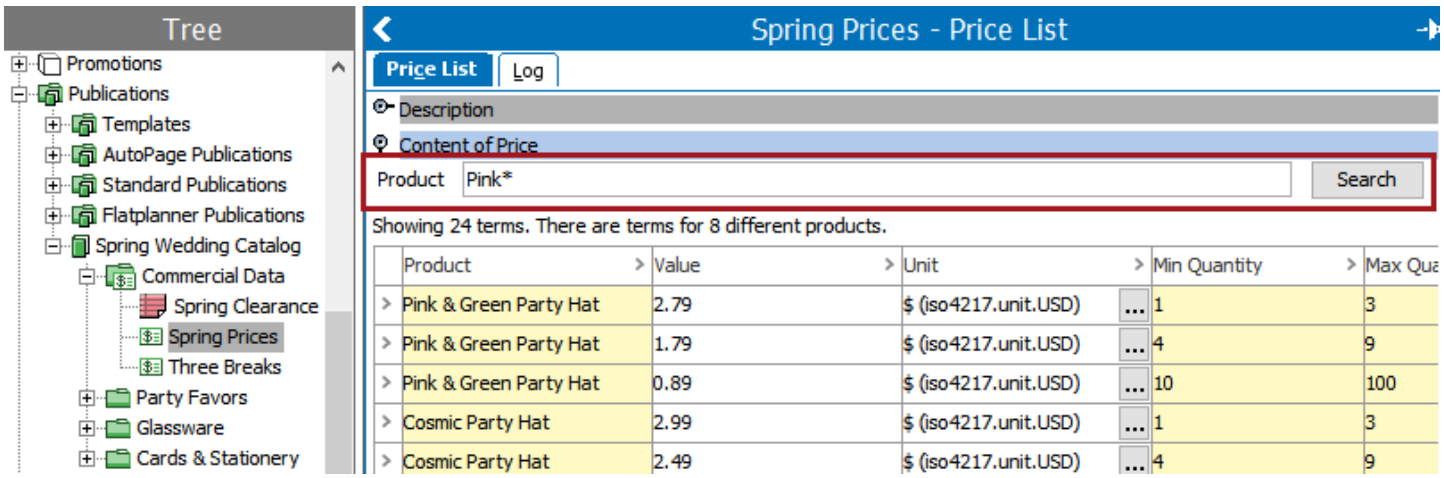
	A	B	C	D	E	F
1	Section	Page	Product/Classification	Image Reference	Price	Space Usage
2	Paper Hats					
3		2				
4			Cosmic Party Hat	step://asset?id=121199	3.99	1603.11mm²
5			Pink & Green Party Hat	step://asset?id=121204	2.99	1660.48mm²
6			Pink & Green Pom-Pom Hat	step://asset?id=121205	2.99	1706.46mm²
7			Politics Party Hats	step://asset?id=121206	17.76	1625.83mm²
8		Total for 2			$27.73	6595.88mm²
9		3				
10			Blue & Yellow Balloon Hat	step://asset?id=121196	2.29	1691.11mm²
11			Blue Wizard Balloon Hat	step://asset?id=121197	2.59	1673.36mm²
12			Pink & Blue Owl Party Hat	step://asset?id=121220	4.79	1690.33mm²
13			Yellow & Pink Party Hat	step://asset?id=121208	5.29	1665.26mm²
14		Total for 3			$14.96	6720.06mm²
15						

For information on how to extract a Financial Report, see the **Financial Summary and Financial Reports** topic in the Flatplanner documentation.

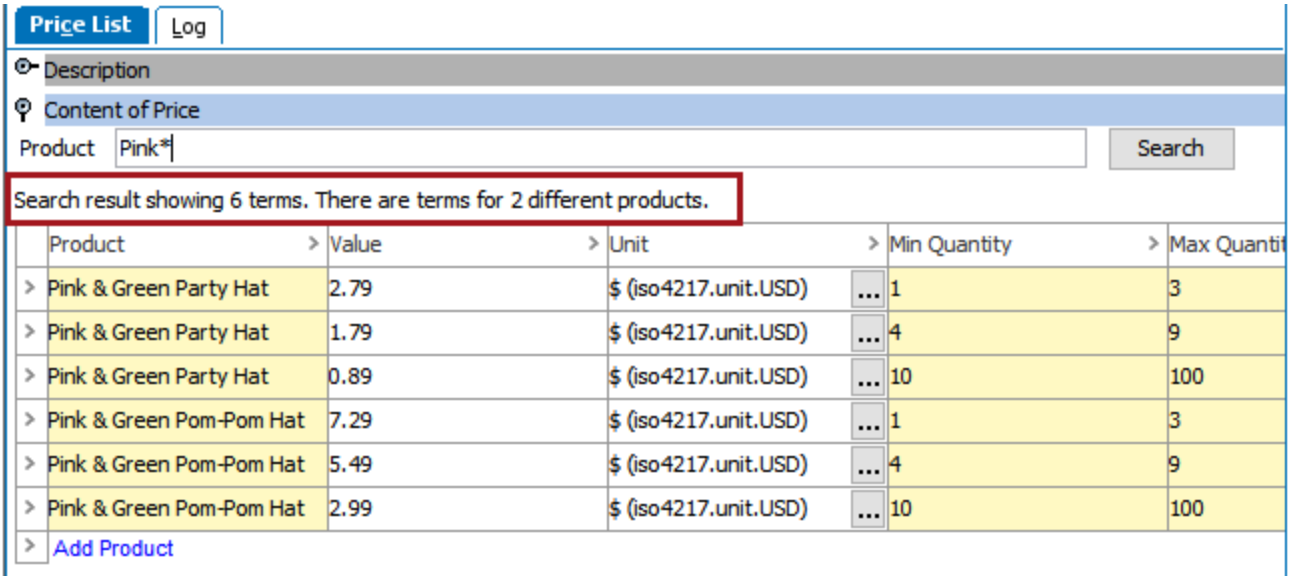
Searching Commercial Data

Products within a commercial list can be located easily using the **Search** feature. Follow these steps to search for specific products in a commercial list.

1. Navigate to the relevant publication in the **Tree**, then expand the **Commercial Data** folder.
2. Select the relevant commercial list, then click the **Price List** tab.
3. Expand the **Content of** area to view the content of the list.
4. In the **Product** field, enter a product name or ID, or use an asterisk to enter part of a name or ID, and then click **Search**.



5. The search results are displayed.



6. To show the entire content of the list again, leave the search field blank, then click **Search**.

Editing Commercial Data

After being imported, commercial data can be edited, either from a commercial list or from a product.

Note: Commercial data cannot be edited if the **Immutable** box has been checked on the price list object. See the 'Additional Configurations for Commercial Lists' subsection of the **Creating Commercial Lists** topic for more information.

This topic details how to edit commercial data in the workbench. For information on editing commercial data in the Publishing Web UI, see **Working with Commercial Data in the Publishing Web UI** in the **Web User Interfaces** documentation.

Edit Commercial Data from a Commercial List

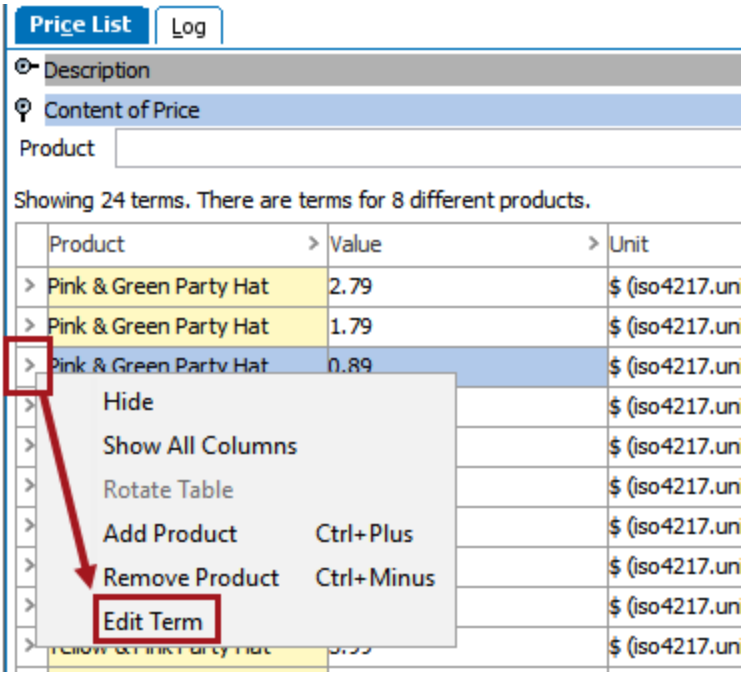
There are two ways to edit commercial data from a commercial list. The **Value** and **Unit** can be edited *directly* from the list. The **Value**, **Min Quantity**, **Max Quantity**, **Start Date**, and **End Date** values can be edited by right-clicking on a product in the list and accessing the **Edit Terms** dialog.

Editing Commercial Data Directly

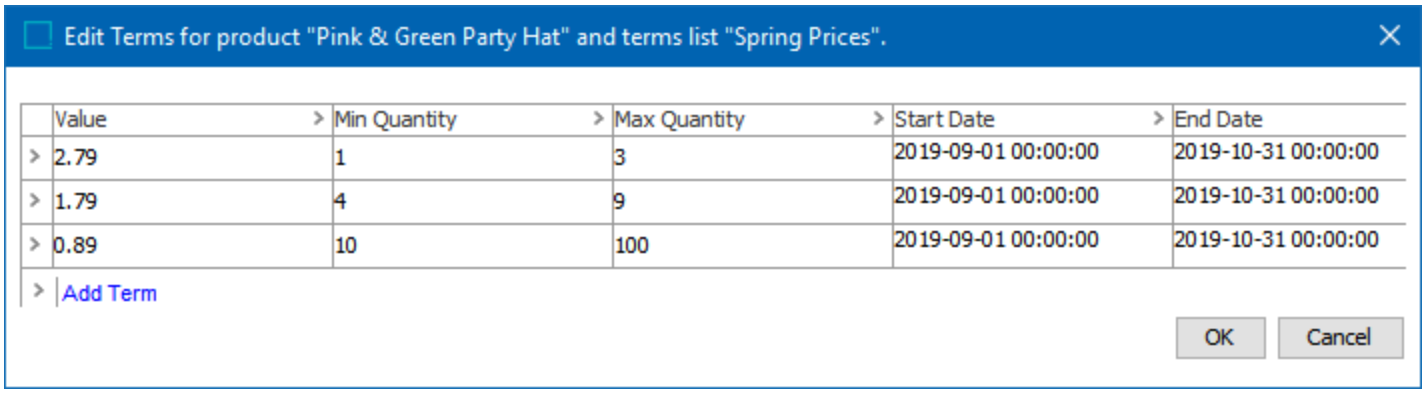
1. Navigate to the relevant **publication** In the Tree, then expand the publication and expand the **Commercial Data** folder.
2. Select the relevant commercial list, then click on the **Price List** tab.
3. Expand the **Content of** section to view the content of the list.
4. Double-click in any **Value** field to edit the value.
5. Click the ellipsis button (...) in the **Unit** field to edit the unit.

Editing Commercial Data from the Edit Terms Dialog

6. Navigate to the relevant **publication** In the Tree, then expand the publication and expand the **Commercial Data** folder.
7. Select the relevant commercial list, then click on the **Price List** tab.
8. Expand the **Content of** section to view the content of the list.
4. Right-click the right arrow next to the preferred term, then choose **Edit Term**.

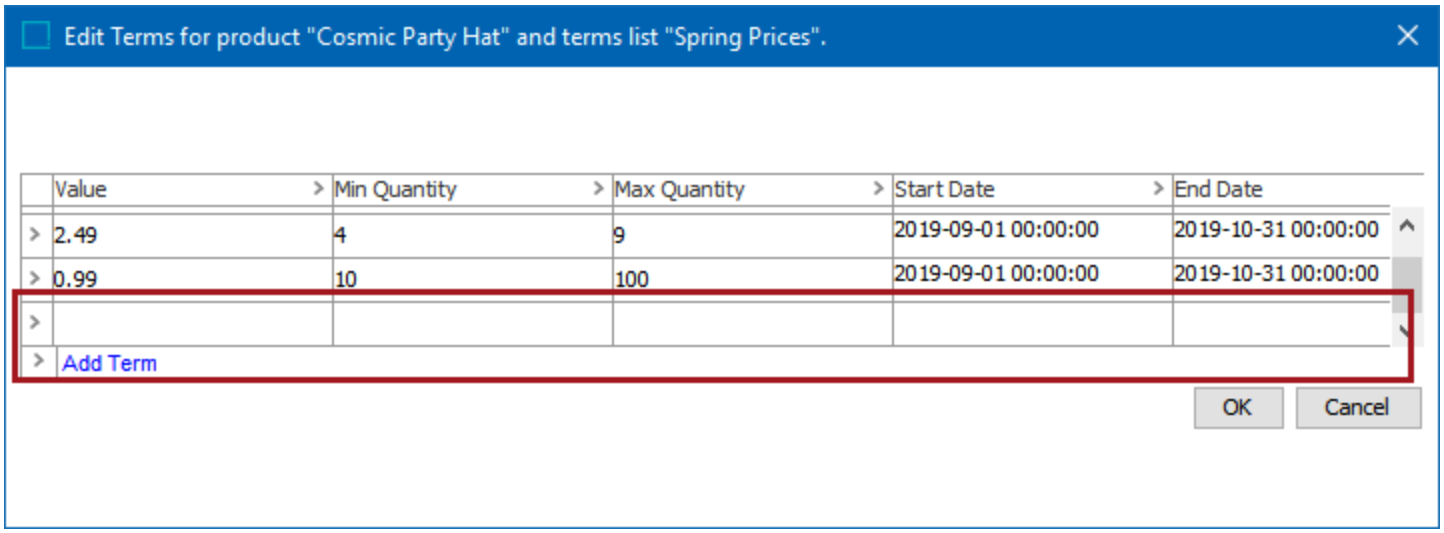


5. In the **Edit Terms** dialog, double-click inside the field for the term that you want to edit, then click **OK** when complete.



Add Terms to a Commercial List

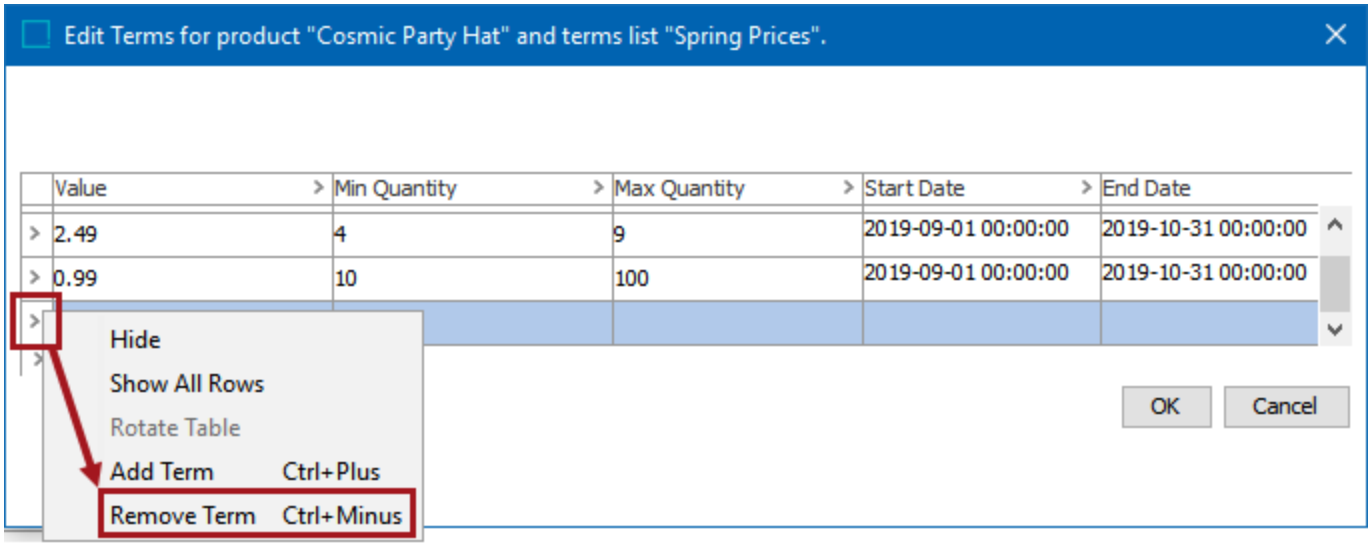
1. Follow the steps outlined above to access the **Edit Terms** dialog.
2. Click **Add Term** to add a new row to the Edit Terms dialog.



3. Enter the relevant term values in the new row, then click **OK**.

Remove Terms from a Commercial List

1. Follow the steps outlined above to access the **Edit Terms** dialog.
2. In the **Edit Terms** dialog, right-click the arrow next to the term you want to remove, then choose **Remove Term**.



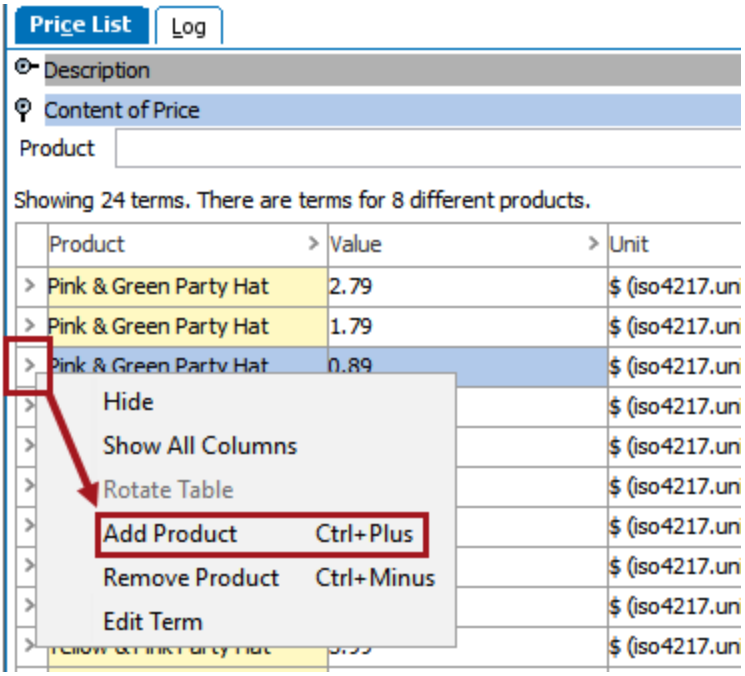
Add Products to a Commercial List

Instead of importing products into a commercial list, you can add products manually, for which you then can edit the terms.

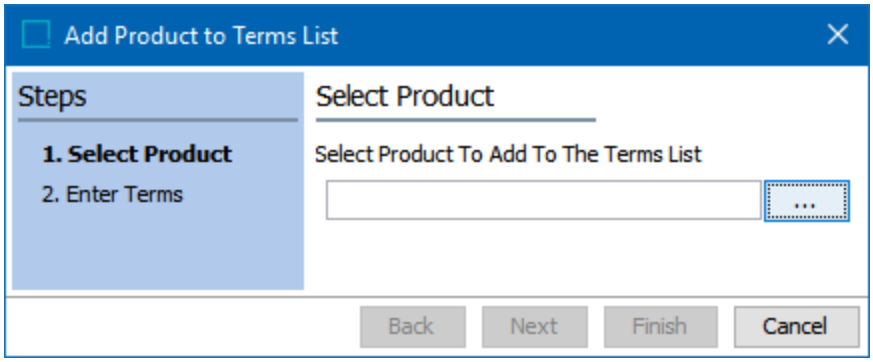
3. Navigate to the relevant **publication** In the Tree, then expand the publication and expand the **Commercial Data** folder.

4. Select the relevant commercial list, then click on the **Price List** tab.
5. Expand the **Content of** section to view the content of the list.

4. Right-click the menu icon (arrow) next to one of the terms in the table, and then click **Add Product**. Alternatively, scroll to the bottom of the table-based view, then click **Add Product**.



4. In the **Add Product to Terms** List dialog, click the ellipsis button (...).



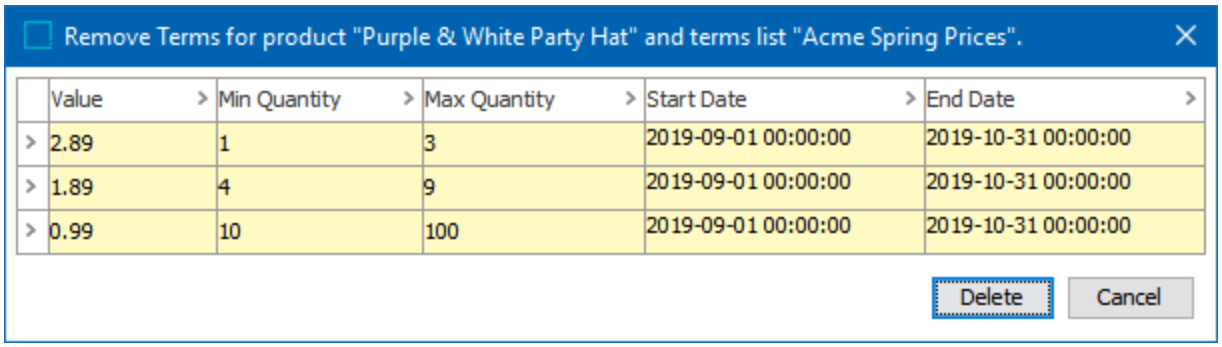
4. Browse to or search for the relevant product on the **Select Product** dialog, then click **Select**. Only one product can be selected; an option to multi-select products is not available.
5. After selecting the product, click **Next** on the **Add Product to Terms** list dialog.
6. In the **Add Product to Terms** List dialog, click **Add Term** to add a new blank row to the dialog.
7. Enter the relevant terms, then click **Add Term** again to add more terms.

Note: No option is available in this dialog to add a Unit. It must be added after the product is added to the list.

4. Click **Finish**. The product is now available in the list.

Remove Products from a Commercial List

1. Follow the same initial steps as above for adding a product, but click **Remove Product** instead of Add Product.
2. The **Remove Terms for** dialog displays, showing all the terms that will be affected.
3. Click **Delete** to remove the product from the list.



To Edit Commercial Data from a Product

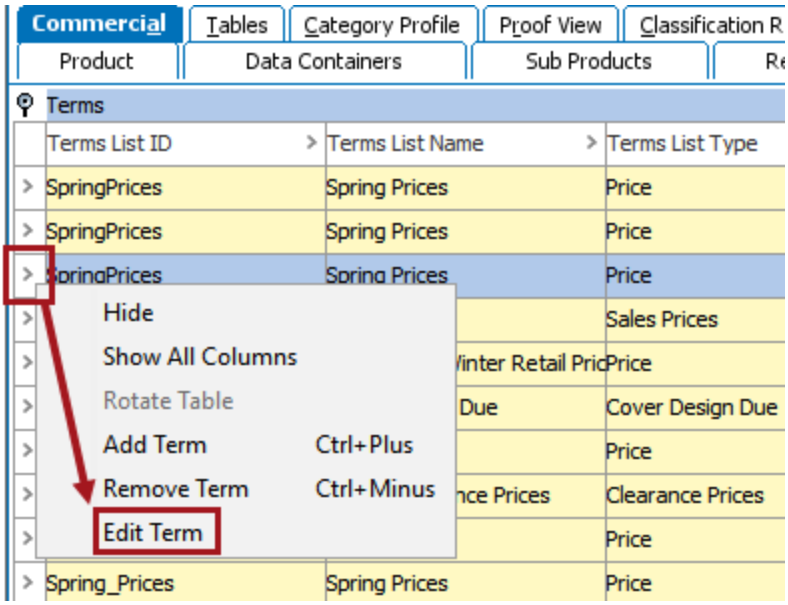
Commercial data can also be edited from product objects that appear in at least one commercial terms list. When viewing commercial terms lists for a product on the **Commercial** tab, the Value and Unit can be edited directly. The Value, Min Quantity, Max Quantity, Start Date, and End Date values can be edited by right-clicking on a **terms list** and accessing the **Edit Terms** dialog.

Editing Commercial Data Directly

1. In the **Tree**, navigate to and select the relevant product.
2. On the **Commercial** tab, expand the **Terms** area. The content of the lists related to the product is displayed.
3. Double-click in any **Value** field to edit the value.
4. Click the ellipsis button (...) in the **Unit** field to edit the unit.

Editing Commercial Data from the Edit Terms Dialog

1. In the **Tree**, navigate to and select the relevant product.
2. On the **Commercial** tab, expand the **Terms** area. The content of the lists related to the product is displayed.
3. Right-click the right arrow next to the relevant term, then choose **Edit Term**.

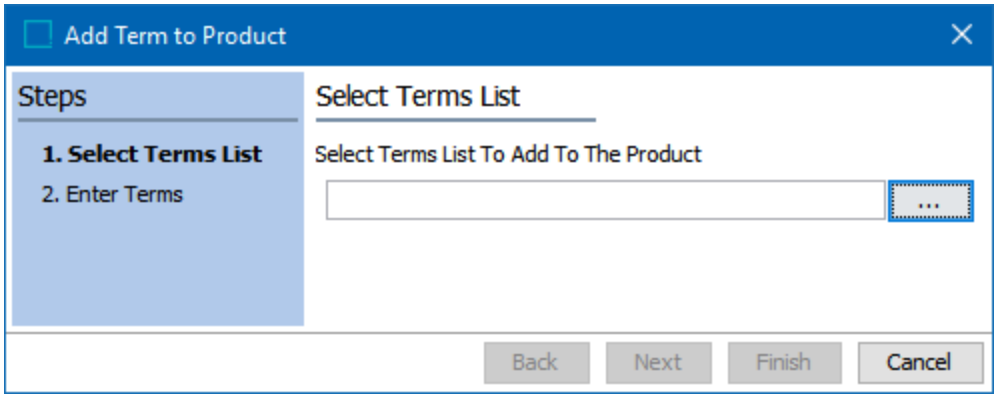


4. In the **Edit Terms** dialog, double-click inside the field for the term that you want to edit, then click **OK** when complete.

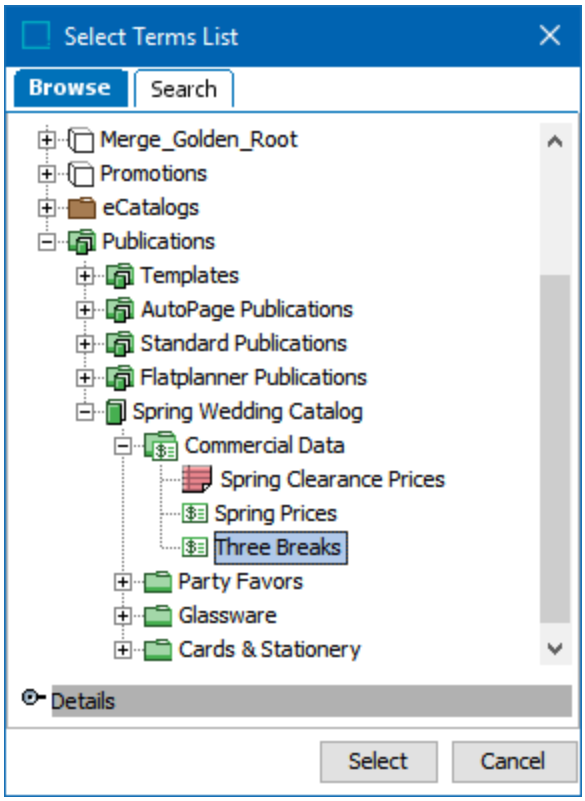
Add Terms to a Product

Terms can be added to a product from the **Edit Terms** dialog, or from the **Add Term to Product** dialog. Follow these steps to add a term from the 'Add Term to Product' dialog.

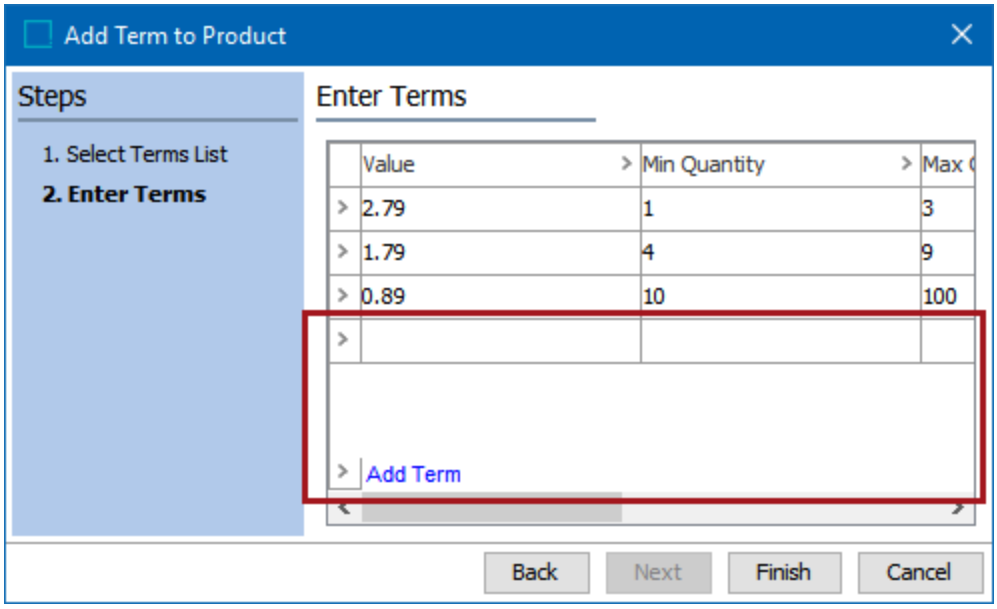
1. In the **Tree**, navigate to and select the relevant product.
2. On the **Commercial** tab, expand the **Terms** area. The content of the lists related to the product is displayed.
3. Click the **Add Term** link at the bottom of the list.
4. In the **Add Term to Product** dialog, click the ellipsis button (...).



5. In the **Select Terms List** dialog, browse to or search for the relevant commercial list, then click **Select** to close the dialog.



6. Click **Next** to go to the **Enter Terms** screen, then click **Add Term** to add a new row under **Enter Terms**.



7. Enter the relevant terms, then click **Finish**.

Remove a Single Term from a Product

1. Follow the steps outlined above to access the **Edit Terms** dialog.
2. Right-click the right arrow next to the preferred term, then choose **Remove Term**.

Remove All Terms from a Product

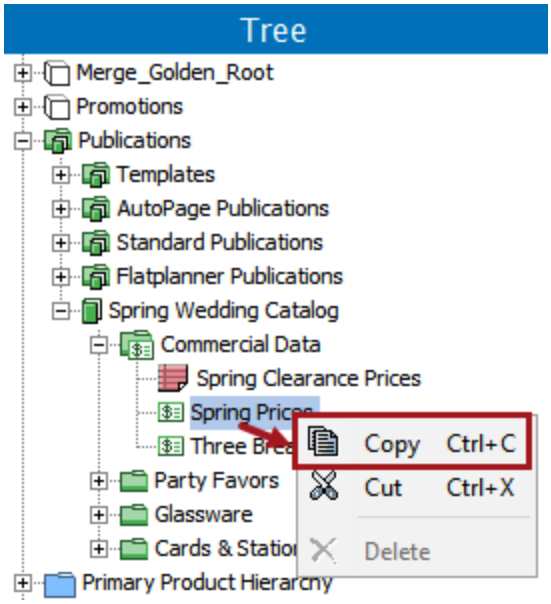
Removing all terms from a product will remove the product itself from the terms list.

1. In the **Tree**, navigate to and select the relevant product.
2. On the **Commercial** tab, expand the **Terms** area. The content of the lists related to the product is displayed.
3. Right-click the right arrow next to the relevant term, then click **Remove Term**.
4. The **Remove terms for product** dialog displays.
5. Verify that you want to remove the listed terms, then click **Delete**. All the product terms are removed.

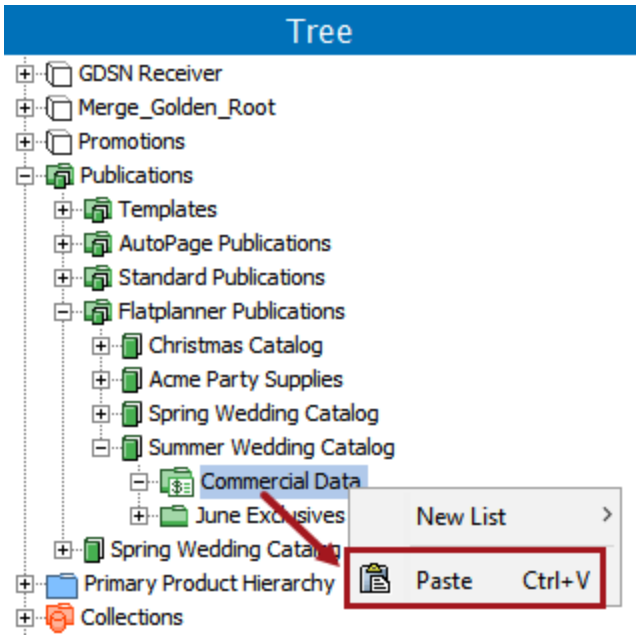
Copying Commercial Lists

You can make a copy of a commercial list and use it as a commercial list in a different publication. You can also copy commercial lists to eCatalogs. For more information on eCatalogs, see the **eCatalogs** documentation in the STEP Online Help.

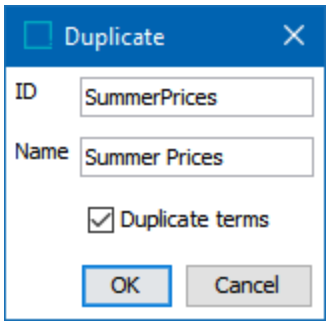
1. Navigate to the relevant **publication** in the Tree, then expand the publication and expand the **Commercial Data** folder.
2. Right-click the commercial list you want to copy, then choose **Copy**.



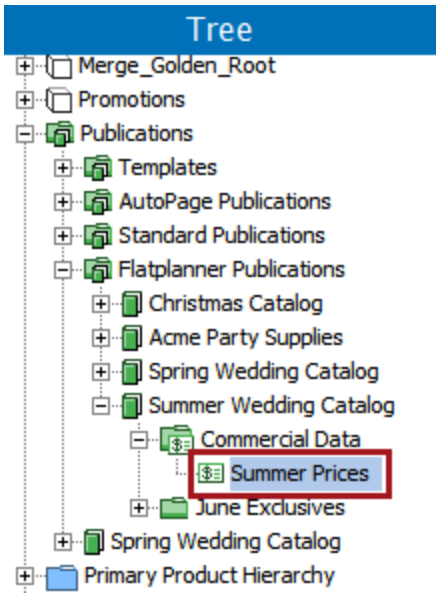
3. Navigate to the publication that you want to copy the list to, then expand the publication and select the **Commercial Data** folder.
4. Right-click the folder, then choose **Paste**.



5. In the **Duplicate** dialog, enter an **ID** and **Name** for the new list. Check the **Duplicate terms** box if you want to copy the actual contents of the list.



6. Click **OK**. The copied terms list is now present in the publication.


Tree
Merge_Golden_Root
Promotions
Publications
Templates
AutoPage Publications
Standard Publications
Flatplanner Publications
Christmas Catalog
Acme Party Supplies
Spring Wedding Catalog
Summer Wedding Catalog
Commercial Data
Summer Prices
June Exclusives
Spring Wedding Catalog
Primary Product Hierarchy

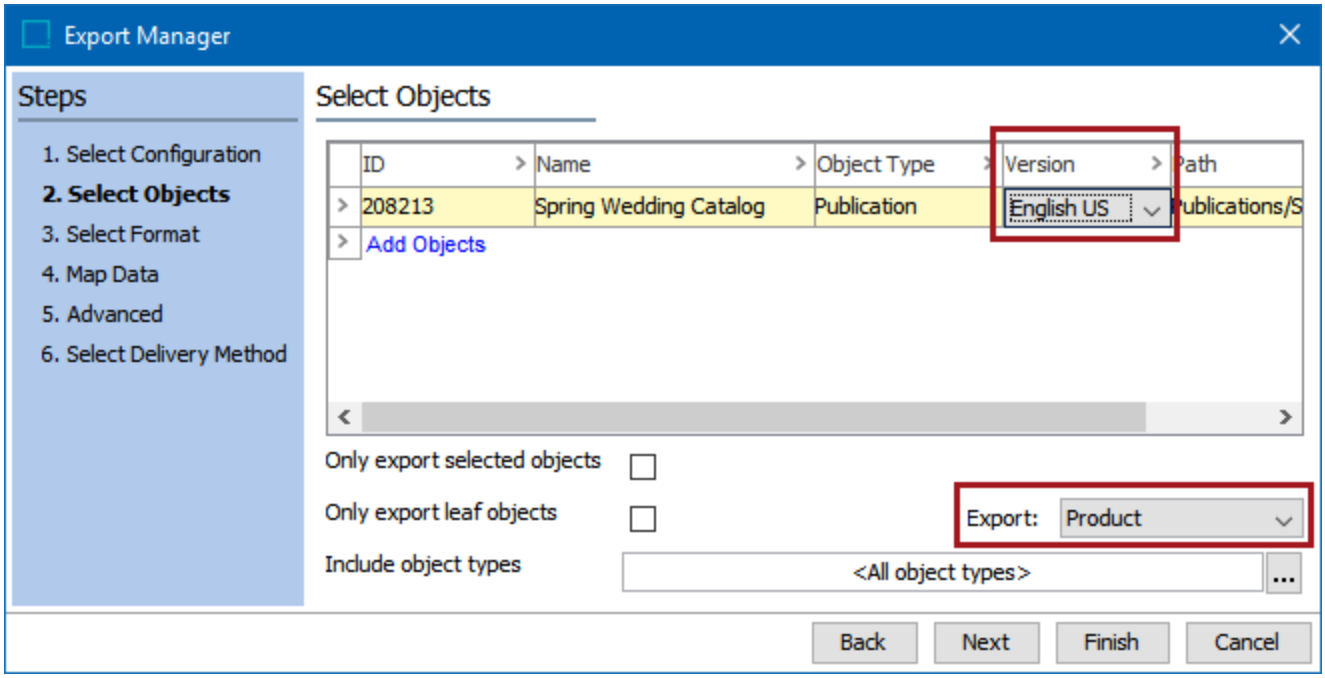
Exporting Commercial Data

Commercial data values can be exported from publications and sections in the **Excel** format by using standard Export Manager functionality. The export extracts commercial data information from the **products** that are mounted onto the InDesign pages that have been saved back to the publication. As long as the products are mounted onto the pages, the commercial data values will export; the commercial terms values themselves do not have to be mounted onto the pages.

Note: Only terms lists **values** are included in the export. Other information (min / max quantity, units, or start / end dates) is not included.

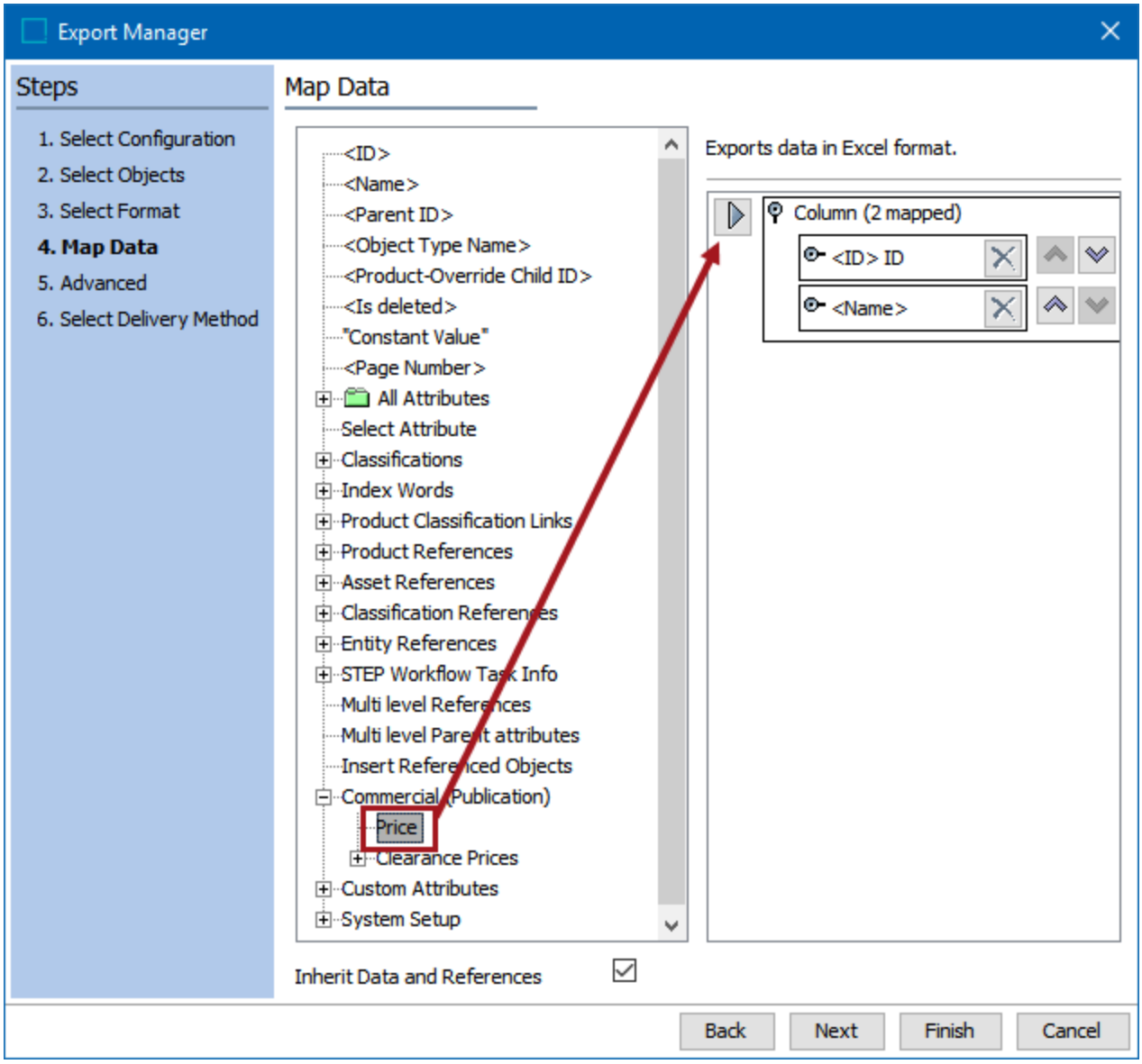
To export commercial data values from a publication or section:

1. Right-click on the desired publication or section and select **Export Data Below**. The Export Manager wizard displays.
2. In the **Select Objects** step, select the relevant version from the dropdown list in the **Version** column and select **Product** in the 'Export' dropdown list. Click **Next**.

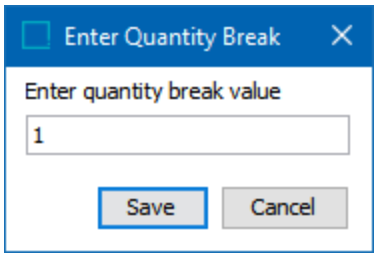


3. On the **Select Format** screen, choose **Excel**.
4. On the **Map Data** screen, click on the relevant information that you want included in the export (for instance, <ID>), then click the arrow button in the right part of the window to add it to the list of data to be exported. At a minimum, you must map **ID** and a **price** column. **Name** is also recommended.

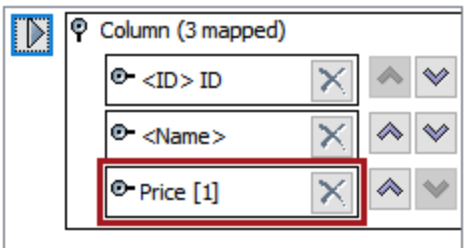
5. To map the commercial data, expand **Commercial (Publication)**. Select the relevant commercial data list (in this example, 'Price'), then click the mapping arrow to add it as a column in the Excel sheet.



6. In the **Enter Quantity Break** dialog that displays, enter the quantity break value (e.g., 1), then click **Save**.

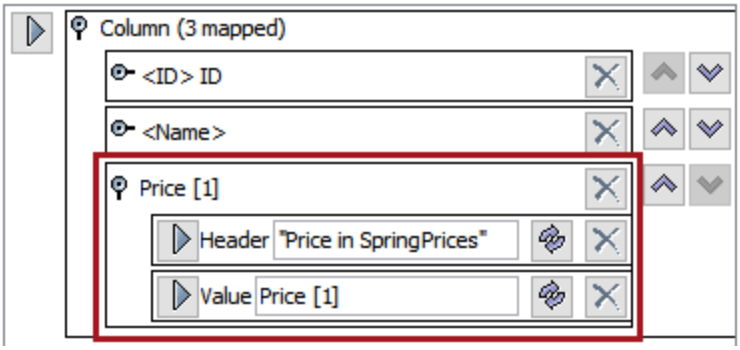


7. The price value is mapped, followed by the break number in brackets, e.g., [1].

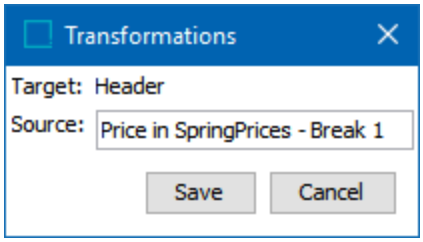


8. To apply **transformations** on the column headers and values that display in the export, click the Price flipper to view the fields that allow transformations ( ). When mapping a commercial value, the same transformations are available as for a product attribute, but the available **aspects** differ.

   For more information on applying aspect transformations to outbound data, see the **Aspect - Transform Outbound** topic in the **Data Exchange** documentation. For a broader overview on applying transformations to outbound data, see the **Outbound Map Data - Transform** topic in the **Data Exchange** documentation.



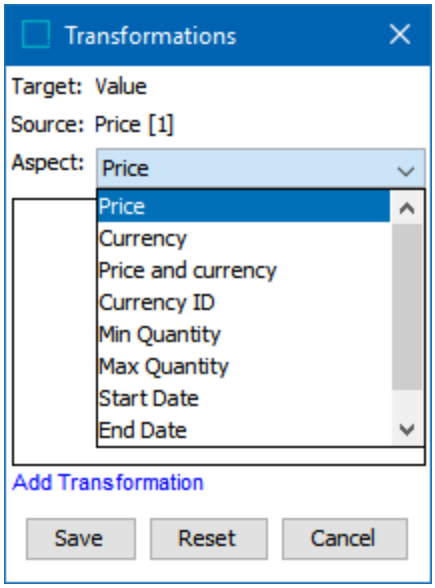
9. Click the **Header** transformation button ( ) to change the header that will display in the Excel export spreadsheet for the price value. In the **Transformations** dialog, enter the desired header in the **Source** field, then click **Save**.



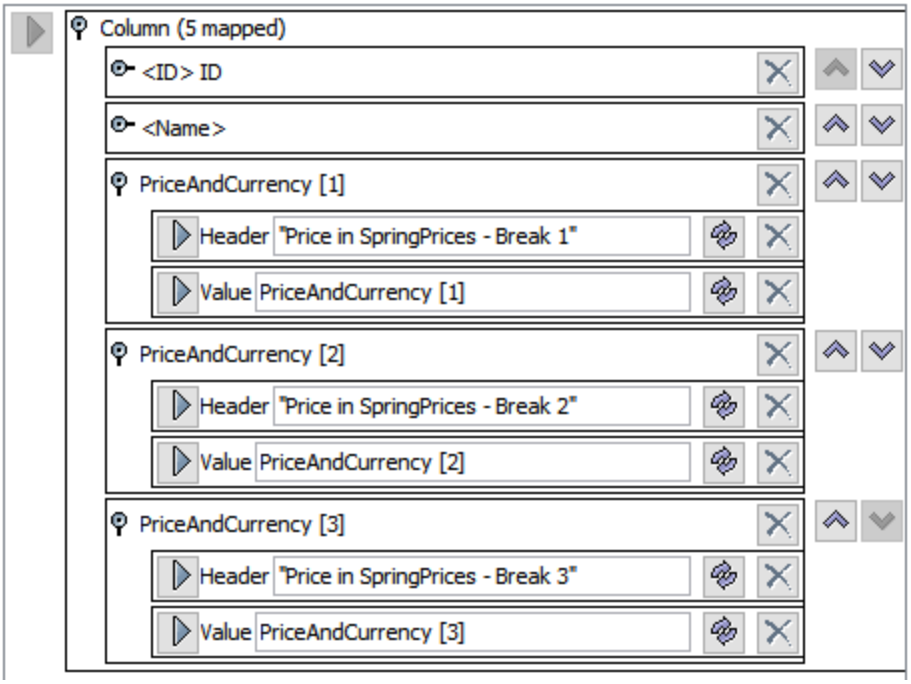
Note: If the header is not changed, then the header in the Excel sheet will be the same for all price breaks, e.g., 'Price in SpringPrices.' As such, it is recommended to customize the header for each break, for example, 'Price in SpringPrices - Break 1.'

10. Click the transformation icon ( ) next to the **Value** field if you want to apply a transformation to the values that display in the price columns. If changing the **aspect**, the following aspects are available:

    - **Price** - default; the value field from the commercial list
    - **Currency** - the unit from the commercial list
    - **Price and currency** - both the value and the unit from the commercial list
    - **Currency ID** - the ID of the unit from the commercial list
    - **Min Quantity** - the Min. Quantity value from the commercial list
    - **Max Quantity** - the Max. Quantity value from the commercial list
    - **Start Date** - the Start Date value from the commercial list
    - **End Date** - the End Date value from the commercial list



11. Repeat the process to map values from additional price breaks. The following screenshot shows a sample mapping with ID, Name, and three price breaks with transformations applied:



12. Click **Next** on the **Map Data** screen when finished.
13. Options on the **Advanced** screen may be ignored, unless you are exporting other product data in addition to commercial terms values and you have special considerations. For information on the options available on this screen, see the **Export Manager - Advanced** section of the **Data Exchange** documentation. Click **Next**.
14. Select **File** on the **Select Delivery Method** screen, then click **Finish**.
15. The export background process launches. Click on 'Go to process' to go to the process on the BGProcesses tab, then retrieve the file under the 'Result' flipper.
16. If three price breaks are mapped, the resulting Excel file will resemble the below screenshot. This example shows values exported from products in a single terms list, with column C containing values from break 1, column D containing values from break 2, and column E containing values from break 3. (This example does not have any transformations applied to the values or the header.)

	A	B	C	D	E
1	<ID>	<Name>	Price in SpringPrices	Price in SpringPrices	Price in SpringPrices
2	121171	Pink & Green Party Hat	2.79	1.79	0.89
3	121177	Cosmic Party Hat	2.99	2.49	0.99
4	121178	Purple & White Party Hat	2.89	1.89	0.99
5	121179	Yellow & Pink Party Hat	3.99	2.79	0.79
6	121184	Christmas Party Hat	1.99	0.79	0.49
7	121192	Politics Party Hats	17.76	9.76	5.76
8	121193	Pink & Green Pom-Pom Hat	7.29	5.49	2.99
9	121190	Dog Party Hats Assortment	9.99	5.99	2.99