

STEP 'N'DESIGN USER GUIDE

The logo for StiboSystems, featuring the word "StiboSystems" in a white, sans-serif font. The letter "i" in "Stibo" has a small crown-like symbol above it. The logo is positioned on the left side of the page, partially overlapping a large orange triangle that points to the right.

StiboSystems

STEP Trailblazer

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About This Guide

The STEP'n'design User Guide contains information about the STEP'n'design plug-in to Stibo's STEP solution. The STEP'n'design plug-in is available from Stibo.

The guide assumes that:

- Users (creative staff and/or designers) have a working knowledge of InDesign
- Users have a working knowledge of the STEP workbench
- Users have a working knowledge of STEP Flatplanner (if using this component)
- Users have a working knowledge of STEP AutoPage (if using this component)
- Users have a STEP user name and password assigned to be able to connect to the STEP database

Note: The guide only contains information about the STEP'n'design plug-in. For more information about STEP PIM, see the STEP Product Information Manager User Guide and the Online Help. For more information about STEP Flatplanner, see STEP Flatplanner User Guide. For more information about STEP AutoPage, see STEP AutoPage User Guide.

About STEP'n'design

This section provides general information about the STEP'n'design plug-in and how it is used in connection with Adobe InDesign, the STEP Workbench, STEP Flatplanner, and STEP AutoPage components.

Note: Supported versions of Adobe InDesign are CS6, CC 2015 (CC11), and CC 2015.4 (CC11.4.0, June 2016 release).

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'n'design 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'n'design include:

- Use of pre-built InDesign page layout templates that can be used repeatedly ('create once, use many')
- Instant availability (via STEP) of text and images for placement ('mounting') on pages
- Ability for creative users to access content in STEP without having to log into the workbench (all tasks can be performed from within InDesign)
- 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 component*)

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 STEP'n'design.

Topics covered in this documentation include:

- STEP'n'design template creation
- Mounting (paginating) pages
- Saving Documents to STEP
- Index generation

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

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

Additionally, limited STEP'n'design functionality—including print on demand—is available in the Web UI. For more information, see the **STEP Publishing Web UI** section of the **Web User Interfaces** documentation [here](#).

Mounting (Paginating)

STEP'n'design provides creative users with a view of text and images within STEP. Mounting of product data can be done by dragging and dropping from the STEP'n'design STEP palettes onto the InDesign page.

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

A template predefines a selection of STEP database content with powerful formatting rules that will automatically style content dragged and dropped onto the page. This feature reduces the time needed to build pages, ensures style consistency, and improves accuracy. Templates can easily be created, maintained, and reused by designers using InDesign.

Using the STEP'n'design plug-in, you can create the following documents:

- Product templates
- Page templates
- Publication templates

Which templates to use depends on your system setup (see table below).

	InDesign	STEP Flatplanner	STEP AutoPage
Product Template	X*	X	X
Page Template		X	
Publication Template	X	X	X
<p>* The use of product templates is optional, but strongly recommended.</p> <hr/> <p>Note: The product templates used when working with or without STEP Flatplanner / STEP AutoPage are exactly the same.</p>			

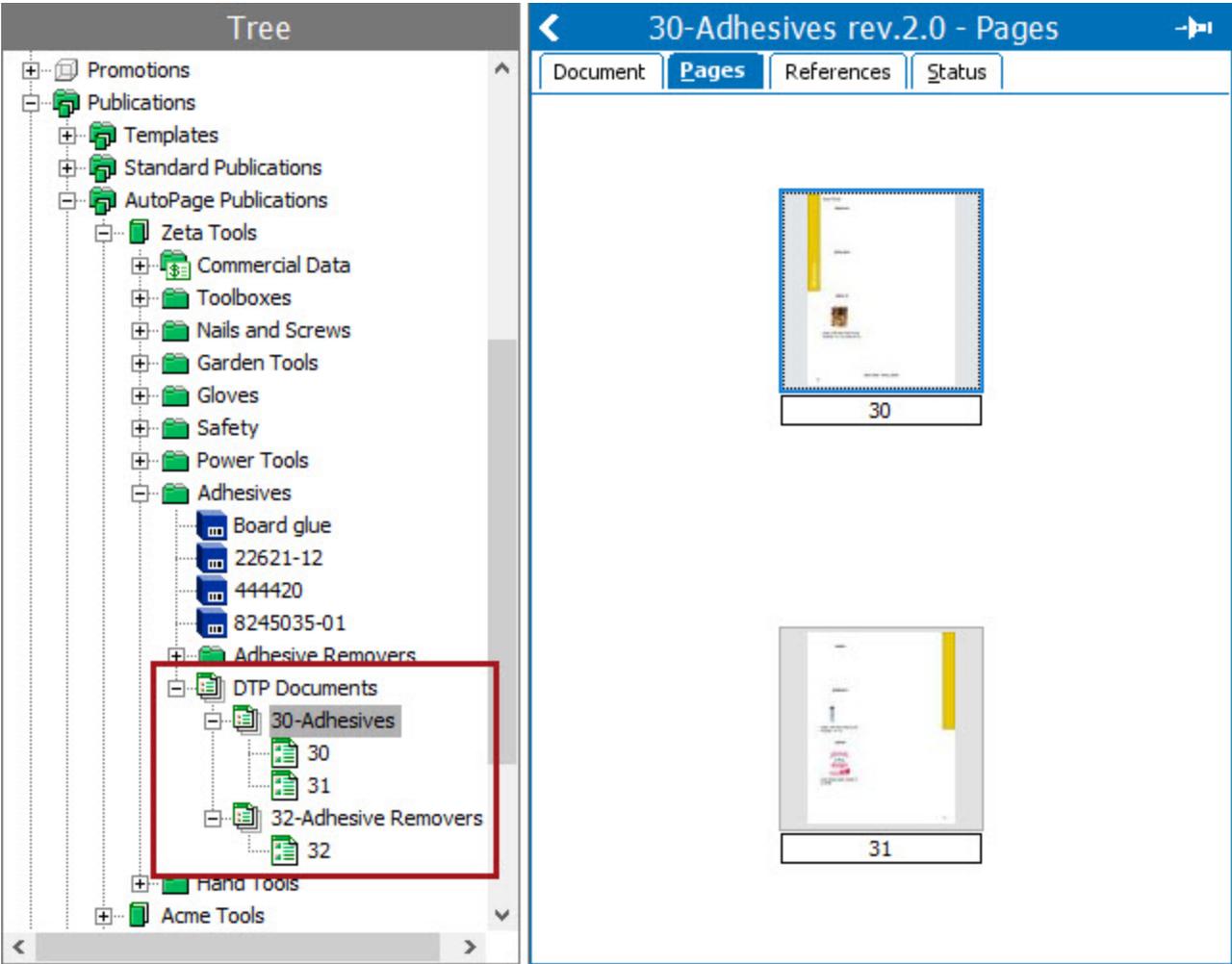
For more information about mounting products and planned pages, see "[Mounting Products](#)" on page 103 and "[Mounting Planned Pages](#)".

For more information about creating templates, see "[Product Templates](#)" on page 59, see "[Publication Templates](#)" on page 80 and "[Page Template](#)".

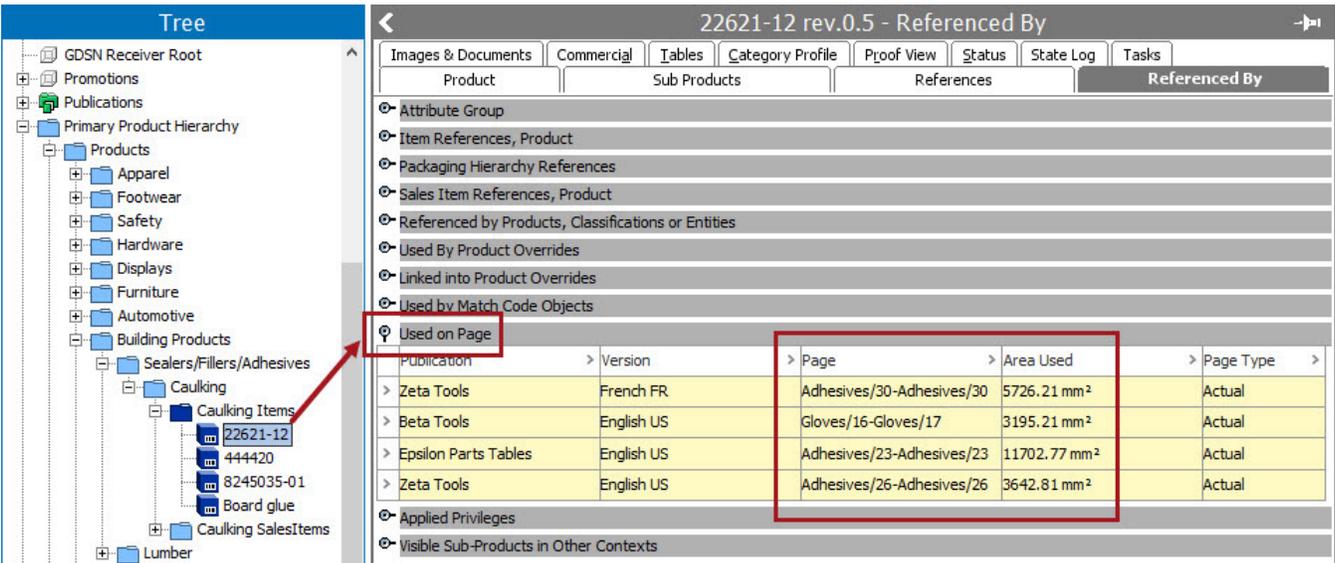
Saving Documents to STEP

Another feature in STEP'n'design is the ability to save InDesign documents back to STEP. Documents to be saved back could be either templates or finalized pages or documents. The advantages of saving documents back to STEP are:

- 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 layout
- It is possible to create indexes

For more information about saving mounted pages and documents, see the section about “finalizing pages/documents” in the respective chapters describing mounting.

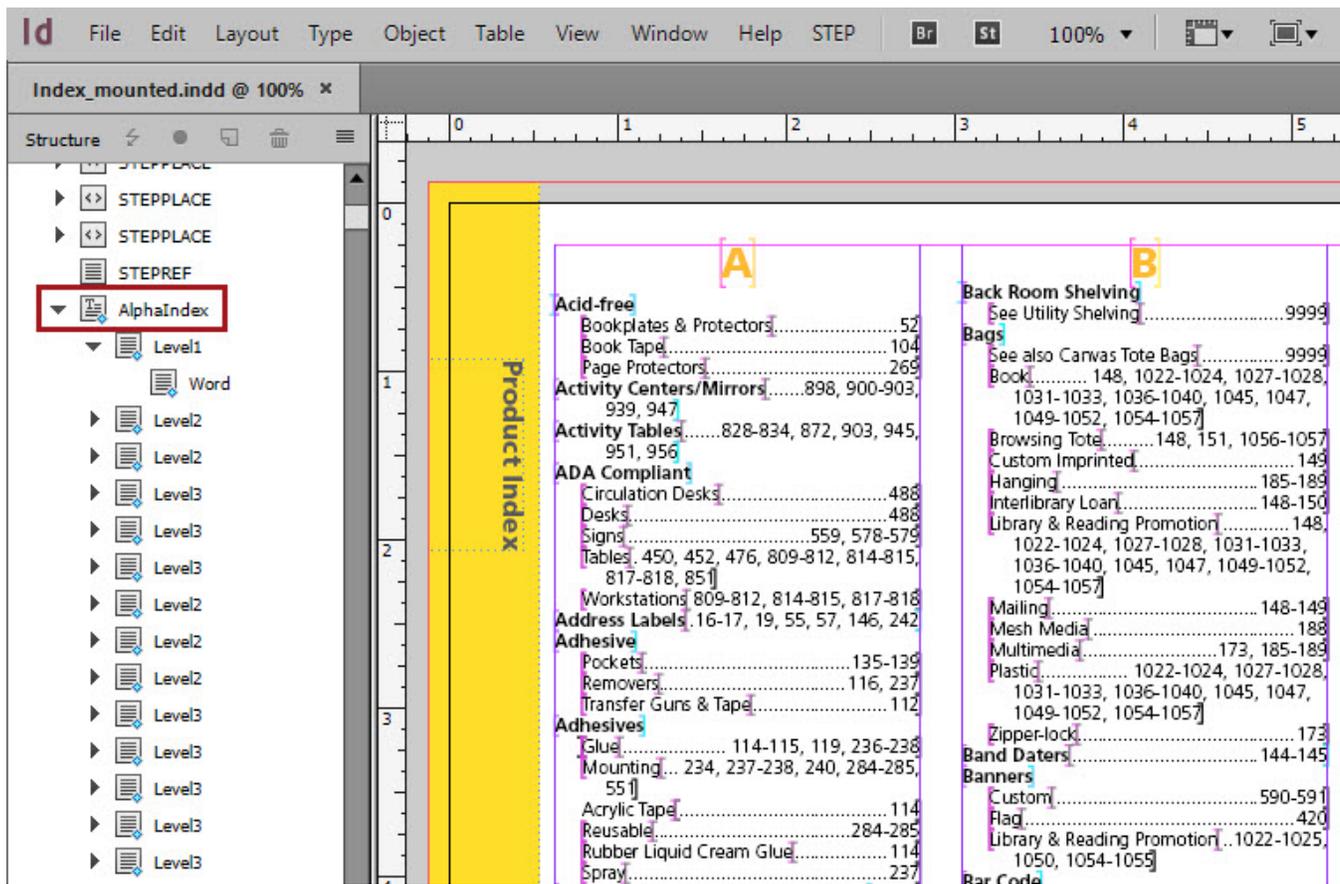
Updating Documents / Database

A key feature in STEP’n’design is the ability to update your already created page(s) with the latest changes from the database. This ability enables you to start building your pages even when product data is not complete or approved yet. Using the update features, you can, at all times, make sure that the contents of your page matches that of the STEP database. You can also work the other way around and update the STEP Database with the latest changes in content on your mounted pages.

For more information about updating documents and writing information back to STEP, see ["Updating Documents in InDesign"](#) on page 141, and ["Writing Data Back to STEP"](#) on page 137.

Creating Indexes

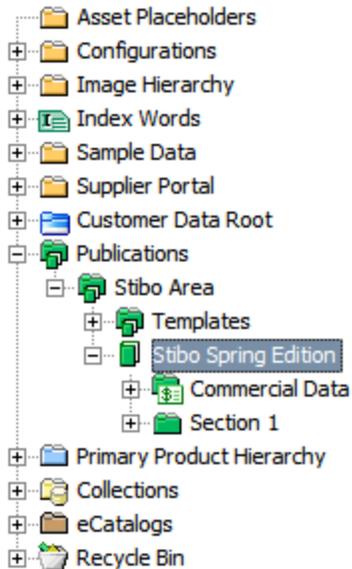
As STEP’n’design enables you to save documents back to STEP with page numbers, you can create an index by using the STEP Export Manager to export the index words in an XML file. From InDesign, the file can then be imported from the File menu. For more information, see [Creating Document Indexes](#).



Publications and Versions

As complexity has increased with the requirement for marketing in multiple languages and to specific consumer segments, it is necessary to define different versions for your publications.

STEP'n'design is capable of supporting 'multi-dimensional' product data. This means that the database can store multiple 'views' on the same product data. Typically, these views—called **versions**—are modeled around specific language and country views on data. Versions could also be created to support currency zones, vertical markets, or type of catalog. Therefore, product data is organized into different versions in publications to enable publishing into InDesign.



The advantages of STEP'n'design that enable you to work with different versions (defining context and workspace) and layers are the following:

- You can see a proof view of the individual layers
- You save cost for printing by using black plate change

For more information about creating publications and versions, see STEP PIM User Guide. For more information about working with versions, see ["Working With Version Layers"](#) on page 97.

Using Workflow

When working with STEP Flatplanner it is possible to set up a workflow. The STEP'n'design integration enables creative staff to use a STEP Flatplanner workflow to access the publications in STEP and accept and complete tasks from within InDesign.

For more information about using a workflow, see ["Mounting Planned Pages"](#).

Installing STEP'n'design

This section contains information about installing the STEP'n'design plug-in(s) on your local computer, logging on to STEP from within InDesign, and setting preferences for your InDesign session.

This topic assumes that you already have InDesign installed on your computer.

Installing the STEP'n'design Plug-in

In order to log onto STEP from within InDesign, you must first install the STEP'n'design plugin relevant to the system that you are trying to access. It is strongly recommended that InDesign is closed while you install the plugin. If InDesign is open, you will need to close and reopen InDesign before the plugin can be registered.

1. Open a browser and type **http://MYSTEPDATABASE:11207/webstart/indesign- Plugin.html** in the **Address** bar to locate the plug-ins.

Note: Substitute **MYSTEPDATABASE** with the name of your own STEP system.

2. Depending on your platform, do the following:
 - If Windows platform, unzip **step-n-design.win.client.csX.zip**, and then save the two InDesign plug-ins, **step-n-design.logic.win.csX.pln** and **step-n-design.ui.win.csX.pln** into the **Plug-Ins** folder within Adobe InDesign.
 - If Mac platform, save the **step-n-design.osx.client.csX.dmg** plug-in on your Macintosh. Open it, and then copy the two files into the **Plug-Ins** folder within Adobe InDesign.

Note: Instead of installing the files in the Plug-Ins folder, you can also create your own folder within the Plug-Ins folder, such as e.g. "STEPplugins".

After installing the plug-ins, you can now log on to the STEP database.

Logging on to STEP and Starting InDesign

To log on to STEP you must have the STEP'n'design plug-ins installed and have a STEP user name and password. Furthermore, a version must have been created, defining the workspace and context you want to work with. For more information about creating a version, see STEP PIM User Guide.

1. Start InDesign. A **Connect to DB** dialog box appears.



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. Click **Logon**. The **Change Version** dialog displays.



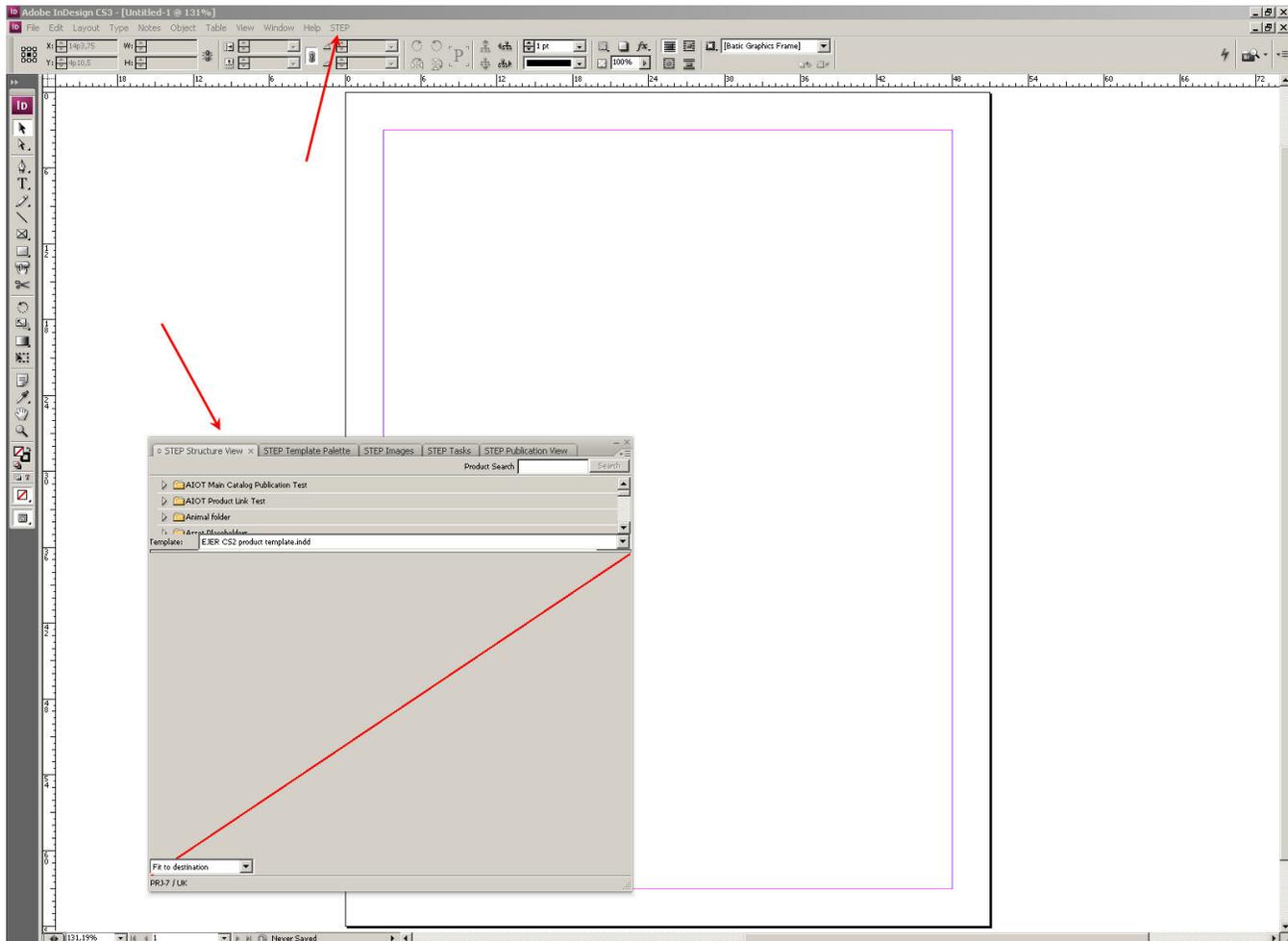
6. Unfold the relevant publication, click a version, and then click **OK**. The version defines the workspace and context to be used.

InDesign will now open. As the STEP'n'design plug-ins have been installed, the InDesign interface contains a **STEP** menu in the menu bar and a number of **STEP Palettes**.

For more information about the STEP menu and the STEP Palettes, see "[Description of the InDesign Interface](#)" on page 14.

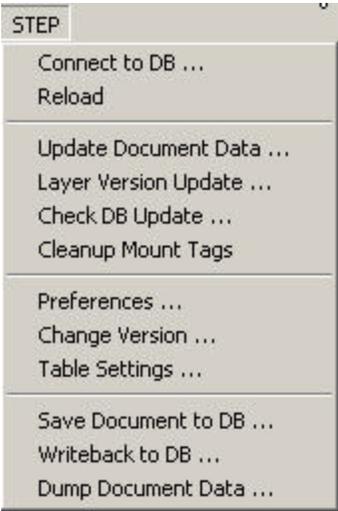
Description of the InDesign Interface

This section contains a description of the InDesign interface and the different commands and views that are available in a **STEP Palette** and **STEP** menu when the STEP'n'design plug-in is installed and you are connected to a STEP database. For more information, see **Installing STEP'n'design** in the **STEP'n'design** documentation.



STEP Menu

In the menu bar of InDesign, a **STEP** menu is available. Clicking the **STEP** menu gives you access to specific STEP'n'design function and allows 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



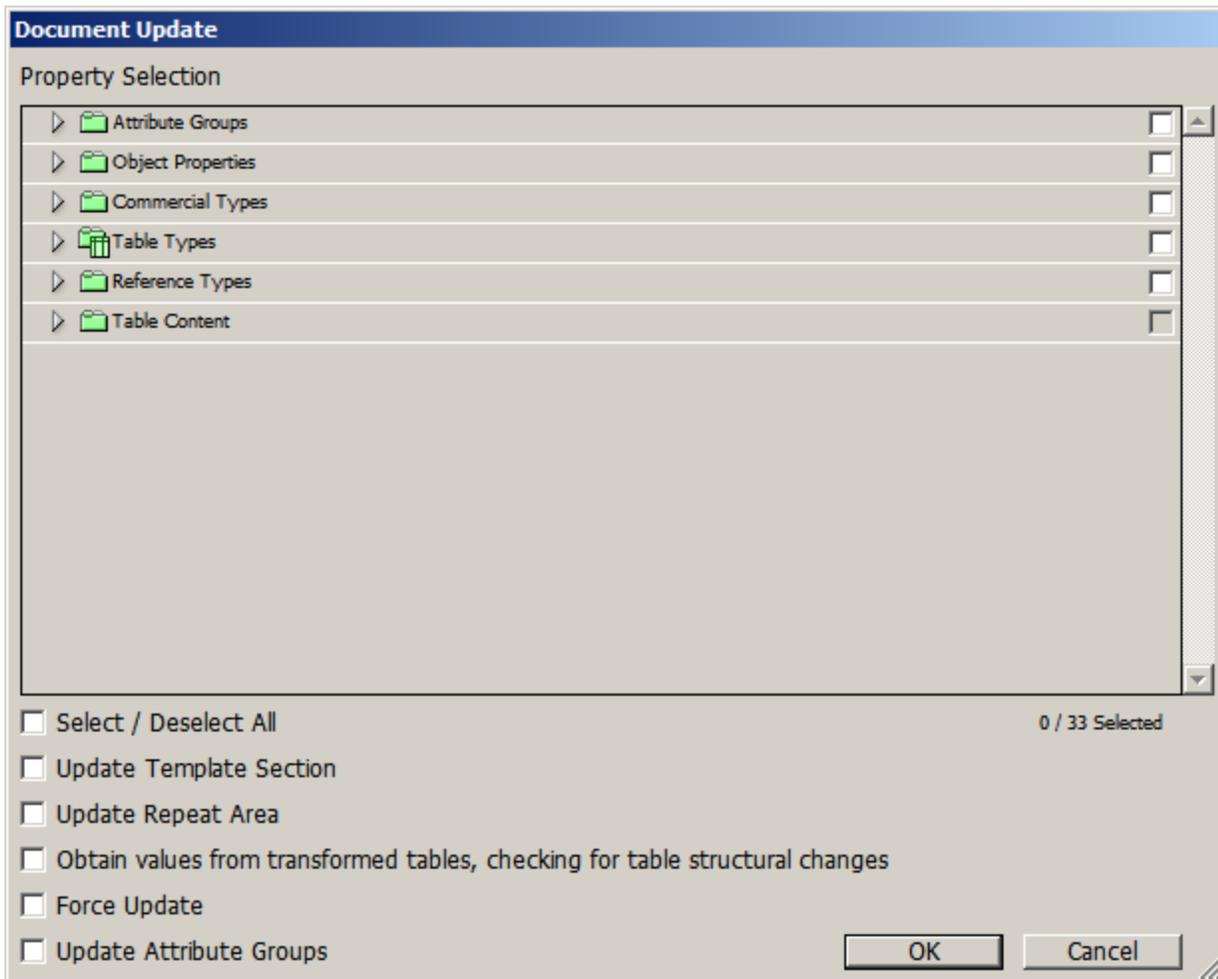
Use this command to connect your InDesign installation to the STEP database.

For more information about connecting to STEP database, see "[Installing STEP'n'design](#)" on page 12.

Reload

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

Update Document Data



Use this command to update your existing document with the latest STEP data structures such as attributes, images or tables.

You can selectively choose which data structure to update, if you know that a certain category of data (such as image references, attributes or tables) have been changed in the database, and you want to have your page updated to reflect those changes.

You can update either a small data structure such as one individual attribute, or you can update an entire group of attributes, images and tables. A very typical use is to do a traditional price merge, where all price attributes must be updated.

You select data structures to be updated by expanding the element types and selecting the relevant check boxes (right hand-side) for one or several data structures.

When selecting the **Select/Deselect All** check box you allow selection/deselection of all items within the tree. The check box indicates how many items have been selected, and the total amount of items.

When selecting the **Update Template Section** check box the list of objects applicable to a template section is compared to those 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** check box is selected the template section is removed from the page and replaced with the original gap etc settings - thus the objects will appear in the order of the database.

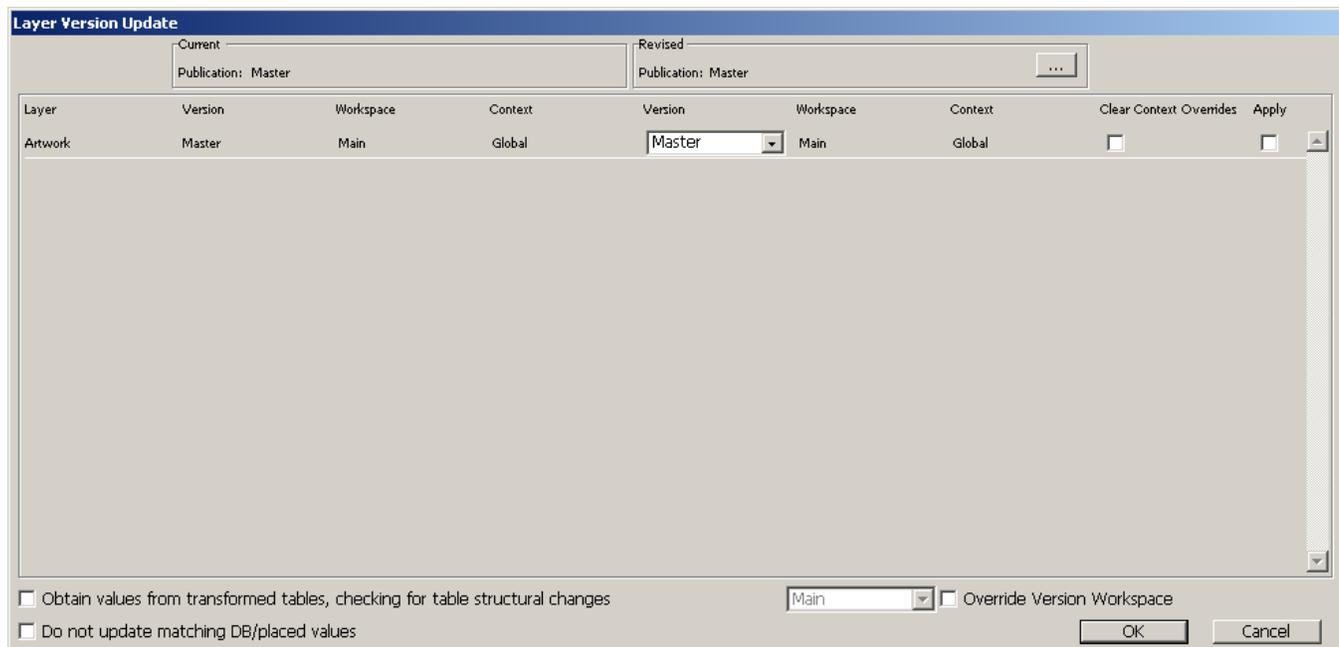
When selecting the **Update Repeat Area** check box the list of objects applicable to a repeat area is compared to those mounted on the page (ignoring order). Additional objects are placed at the end of the list unless deleted items are also found - in which case added items replace the deleted items until there are no more deleted items and the remaining items are then placed at the end of the list. When the **Force Update** check box is selected the repeat area is removed from the page and replaced with the original gap etc. settings - thus the objects will appear in the order of the database.

Selecting the **Obtain values from transformed tables, checking for table structural changes** check box will update the attribute values by resolving the table and getting the value from the table - if structure matches. This option is very useful since transformations in a table are applied in a sequence, and the resulting attribute value in a cell may therefore be very different from the value entered by the PIM operator.

Selecting the **Force Update** check box will re-send a value from the STEP database to the page and overwrite local changes on the InDesign page.

For more information about updating existing document with the latest STEP data, see "[Updating Documents in InDesign](#)" on page 141.

Layer Version Update



Use this command to switch context/workspace for an InDesign version layer of your own choice.

Changing version layer 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. For more information about changing version layers and context / workspace, see "[Working With Version Layers](#)" on page 97.

It is possible to change the publication as well by clicking the [...] button (upper right area). This is useful if you want to attach an existing document to another publication.

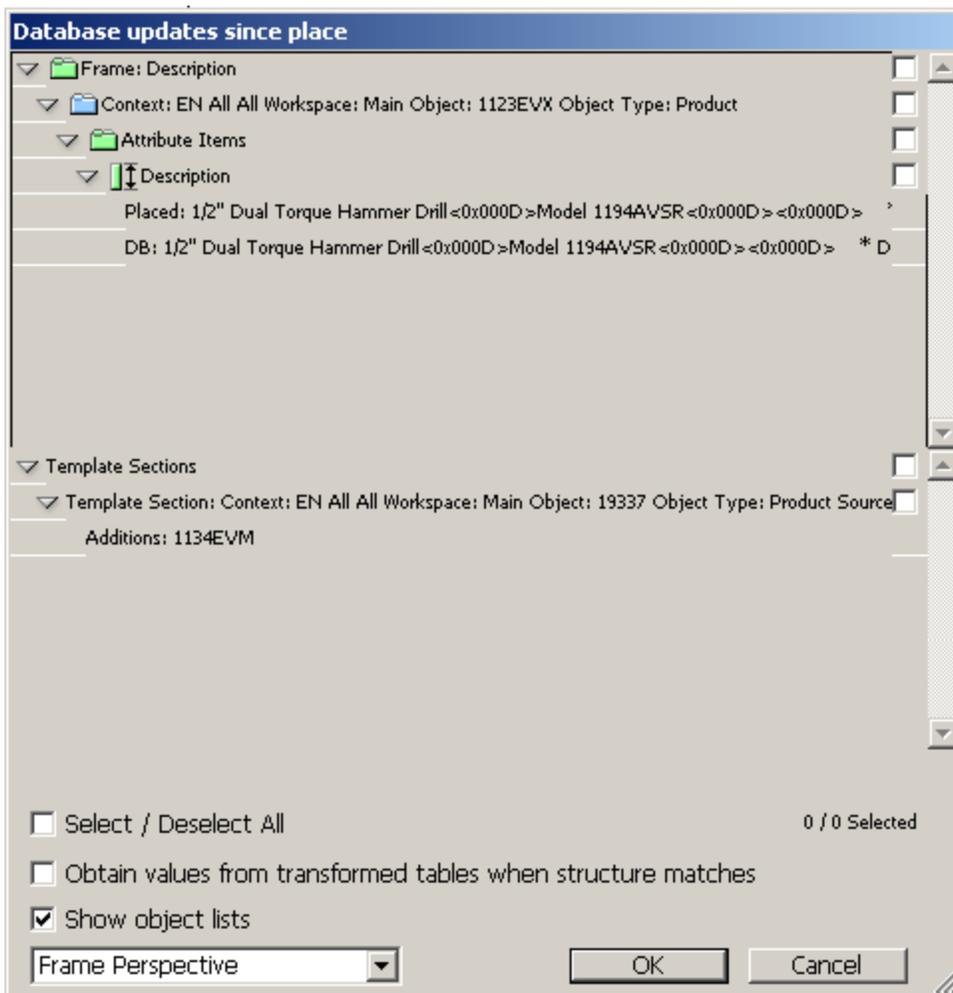
You can also use the command to swap workspace of mounted products. When swapping workspace, you may need to mount product data from the Main workspace first and then swap the workspace to the Approved workspace later. To be able to swap workspace the **Override Version Workspace** check box must be selected.

You can choose not to update placed values in case the placed values are identical to the new values. This is done by selecting the **Do not update matching DB/placed values** check box. The placed values will be compared to the values that need to be replaced and if these two values are identical no change will occur. This is a useful way to retain styling made to placed values that matches the new values.

The **Clear Context Overrides** option sets the context applied to all items on the layer to that assigned to the version. If a frame or attribute had a specific context applied through the product template settings on the template palette there are removed.

For more information about workspaces, see [About Workspaces](#).

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 the STEP database.

From the list (lower left corner) you can choose to display the update-candidates by:

- Frame-Perspective (which means that data will be displayed frame-by-frame as mounted on the page)
- or by Object Perspective, which means data will be displayed product-by-product as it is organized in the STEP database.

When selecting the **Select/Deselect All** check box you allow selection/deselection of all items within the tree. The check box indicates how many items have been selected, and the total amount of items.

Selecting the **Show object** lists will 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.

It is possible to perform the actual update from within this dialog box by selecting the relevant check boxes in the right hand-side. If selecting the **Obtain values from transformed tables when structure matches** check box when updating, the table structure is retained and only the values are updated - if structure matches.

Cleanup Mount Tags

Use this command to cleanup mount tags on the page after removing a product (unless you are using the **Unplace selected object** option under STEP Structure View/Place).

STEP Preferences

See **Configuring the STEP Preferences Menu** in the **STEP'n'design** documentation for full details.

Preferences

Multi-place Gap: 0.0417 in Multi-drop commit: 0

Structure Tree view options

Show all Attributes in Tree

Show Tables in Tree

Show Asset References in Tree

Show ID after name

Place in Galley

Place in Free Space

Fit Calculated Table Width to Frame Width

Process Folder: C:\Users\abcd\step-dtp\indesign\

Template Path: C:\Users\abcd\Documents\Templates

Template Cache size: 0

Server presentation: None

Use default asset path

Asset Location:

Note Layer: Notes

Note Colour:

Don't mount Done Notes

Prompt for Version

Auto Show Version Update Auto save before save to DB

SOAP Timeout: 900 cURL Timeout: 900

Export... OK Cancel

Change Version



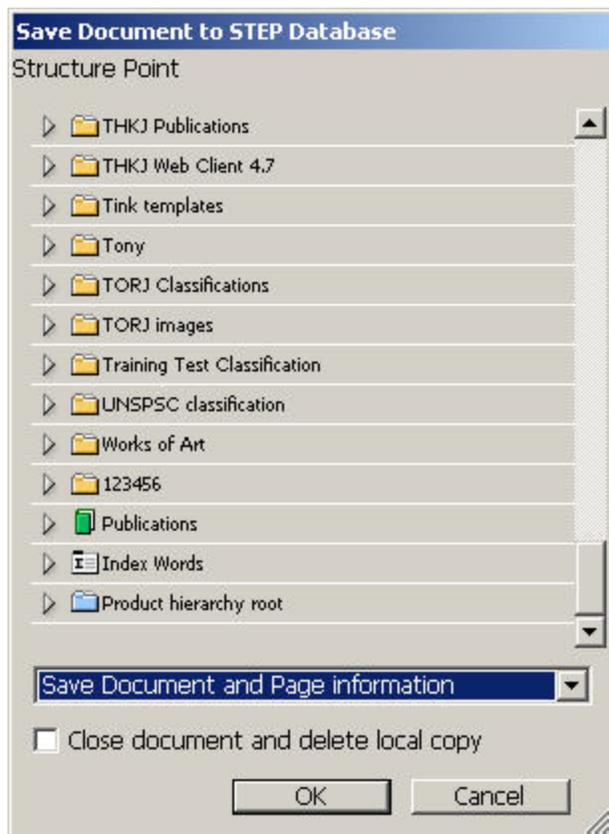
Use this command to change version. The version defines the workspace and context you view in.

For more information about creating a version, see STEP PIM User Guide. For more information about working with version layers, see ["Working With Version Layers"](#) on page 97.

Clean Mount Tags

Use this command to cleanup mount tags on the page after removing a product (unless you are using the **Unplace Selected Object** option under STEP Structure View/Place).

Save Document to DB



Use this command to save your InDesign page back to the STEP database (alternative to storing it on your local hard drive). If you save templates and publication templates back to STEP, the documents are selectable as templates for other STEP users. You can save templates and publication templates back to a green publication group. This way you keep publications and relevant templates together.

You can save the page in the following ways:

Save as Template: It is possible to save a document back to STEP as a product template. Once saved as a product template, the document is selectable as a template for STEP users, who want to assign it as a default template for a product.

Save Page Information: Document data (product assignment, page numbers, preview)—but not the physical InDesign file—is stored in STEP. A document can only be saved into the section in the green Publication hierarchy.

Save Document and Page Information: Document data (product assignment, page numbers, preview) as well as the physical InDesign file, is stored in STEP. A document can only be saved into a Section in the green Publication hierarchy.

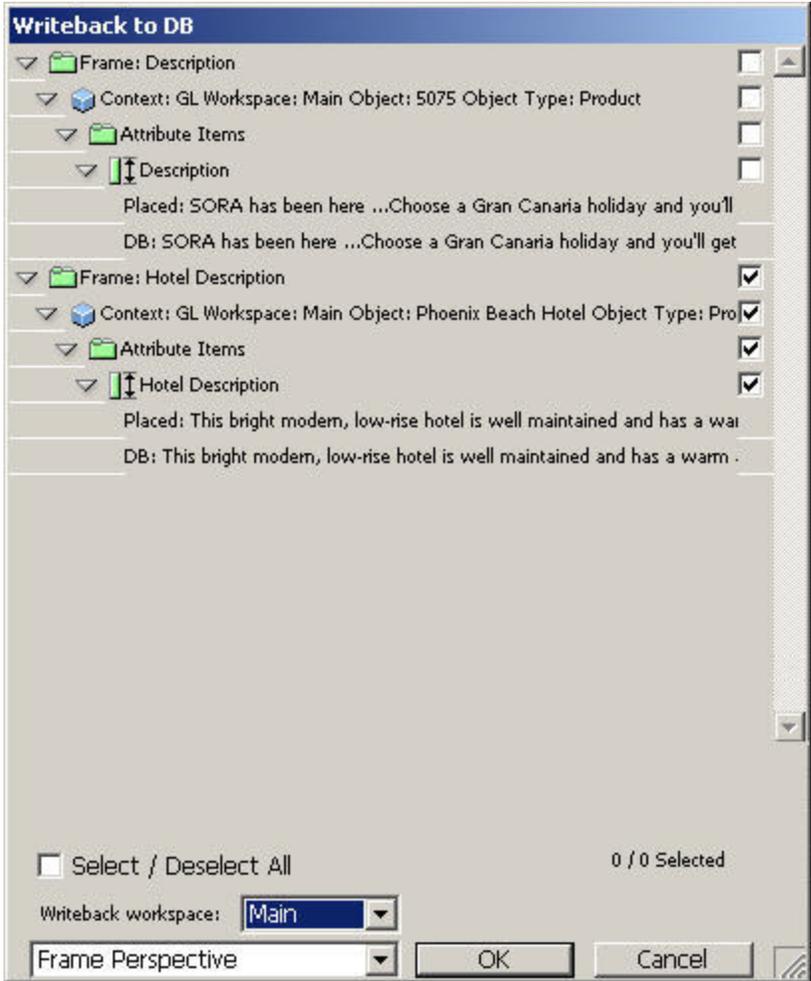
Note: For users with large files and/or slow network connection, this option will significantly increase the time taken to save to database compared to the **Save Page Information** option.

Save Publication Template: It is possible to save a document back to STEP as a publication template. A publication template is the one that product data is mounted onto.

Save Page Template: (Only relevant if you have a STEP Flatplanner license) It is possible to save a document back to STEP as a page template. A page template is used together with Flatplanner. A page template specifies areas where products, assets and other items can be mounted.

Selecting the **Close document and delete local copy** check box will delete your locally stored document after saving back to database.

Writeback to DB



Use this command to write back mounted attribute content from InDesign to the STEP PIM database in case you have made some changes to the product data in your InDesign document that must be reflected in the database.

You can choose which data to write back by selecting the check box in the right hand-side.

When selecting the **Select/Deselect All** check box you allow selection/deselection of all items within the tree. The check box indicates how many items have been selected, and the total amount of items.

From the Writeback workspace list you can select the workspace to write back to.

From the list (lower left corner) you can then choose to display the write back-candidates by:

- Frame-Perspective (which means that data will be displayed frame-by-frame as mounted on the page)
- or by Object Perspective, which means data will be displayed product-by-product as it is organized in the STEP database.

For more information about writing data back to STEP, see "[Writing Data Back to STEP](#)" on page 137.

Show Hidden Text Markers

Use this command to display the hidden text markers around STEP values.

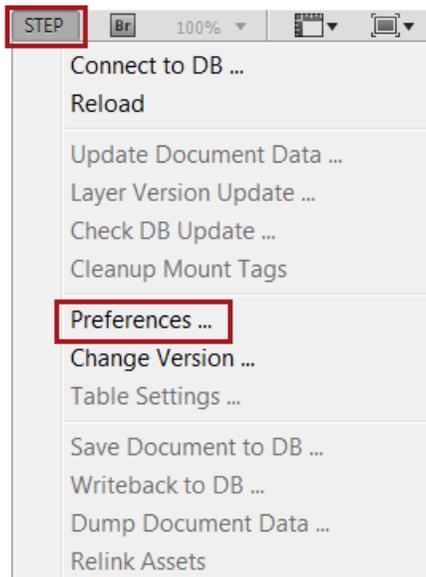
Dump Document Data

Use this command to save an XML file containing information about the document, such as context, workspace, mounted Objects, layers and page information. This is useful in case of troubleshooting.

Configuring the STEP Preferences Menu

The STEP **Preferences** menu in STEP'n'design contains settings that control much of the behavior of the STEP palettes 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 here 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 here 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.
- **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.
- **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.
- **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.
- **Show ID after name:** Check this box to display both object IDs and Names in the different STEP palettes (panels).
- **Place in Galley:** Selecting this check box indicates that mounting using a product template (and not using STEP Flatplanner) should be performed into a text galley. For more information, see the **Mounting Products** section of the **STEP'n'design** 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 (rather than placing it in the specific location where you drop it) when creating a product template. For more information about creating product templates, see the **Product Templates** section of the **STEP'n'design** documentation.

- **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'n'design 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).
- **Template Path:** This is the path to the folder / directory where your product templates are stored. Required when mounting pages locally through drag and drop operations.
- **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 product template specified in the **STEP Structure View** panel. Choose **Product default** to use the default product template assigned to the object in STEP. Choose **Publication rules** to use the product template(s) specified by the Object Layout pagination rules specified in STEP.
- **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 Technical Support. 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 hi-res images is specified here. This field should be left empty if your system has not been set up to use Asset Push. See the Linking to an Asset Location on an InDesign Server documentation 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 color for the Notes to be displayed.
- **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.
- **Prompt for Version:** Check this box to have STEP'n'design 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.
- **SOAP Timeout:** Enter a configurable timeout for SOAP 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'n'design preferences into a text file. This file can be used by Stibo support personnel to help troubleshoot issues.

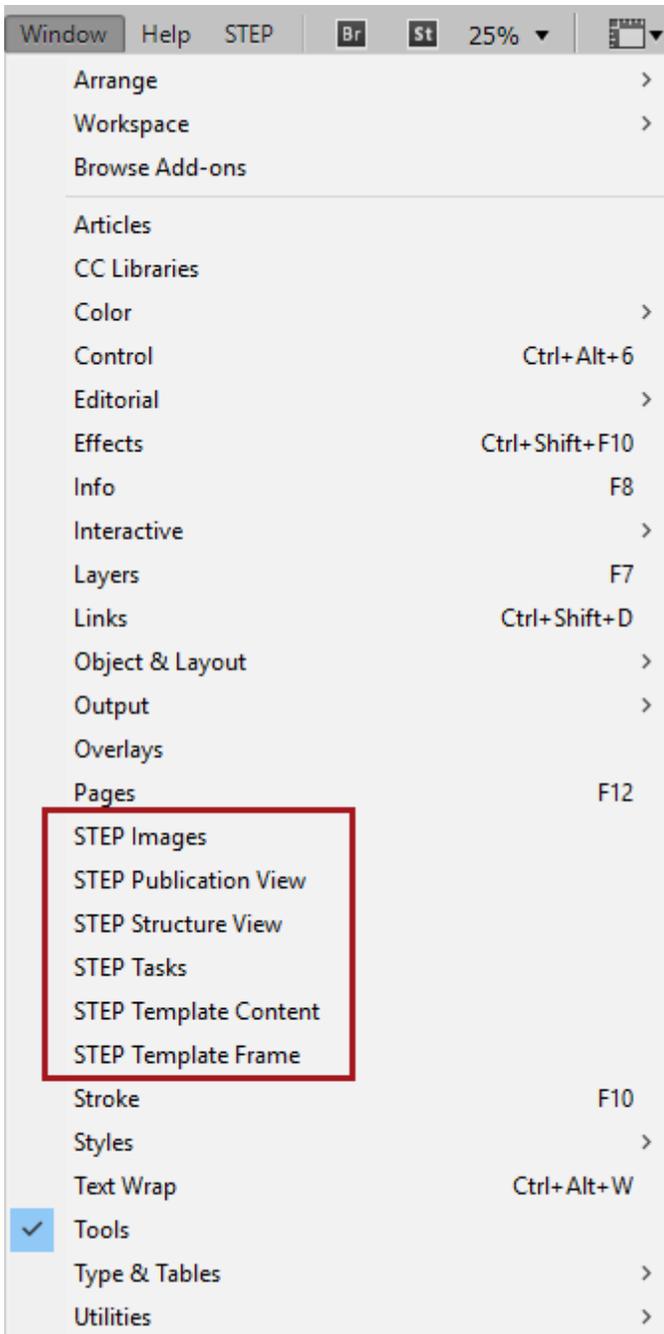
STEP Palettes in InDesign

The **STEP Palettes** are used for actual mounting of STEP data, including template composition and image mounting. Six InDesign palettes (also known as **panels** in InDesign terminology) are used with STEP'n'design:

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

The STEP palettes are accessed from the **Window** menu in InDesign (accessed from the InDesign application bar across the top) 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 palette are addressed in the following sections of this documentation.

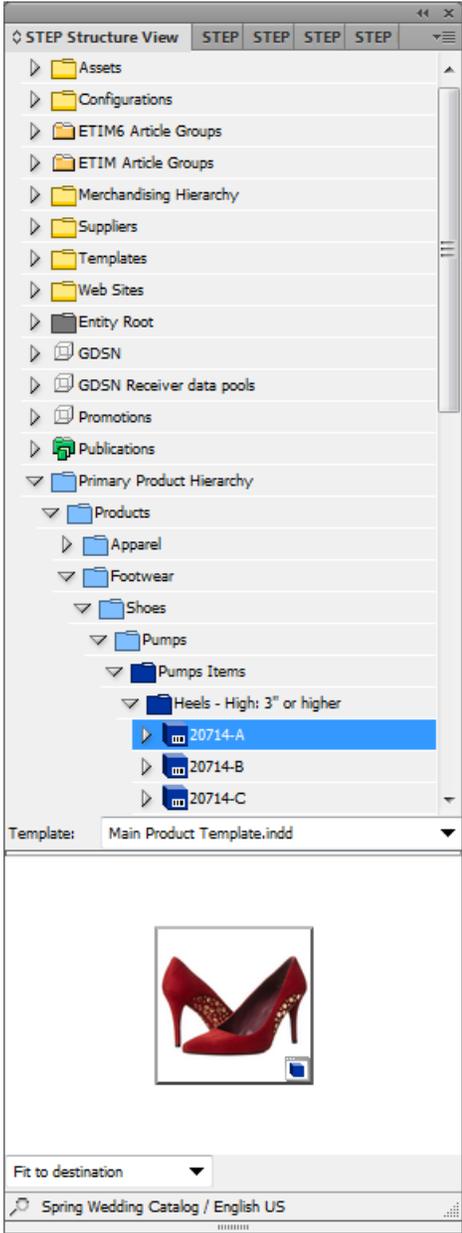


STEP Structure View

The **STEP Structure View** InDesign palette (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 here if needed (for example, entities).

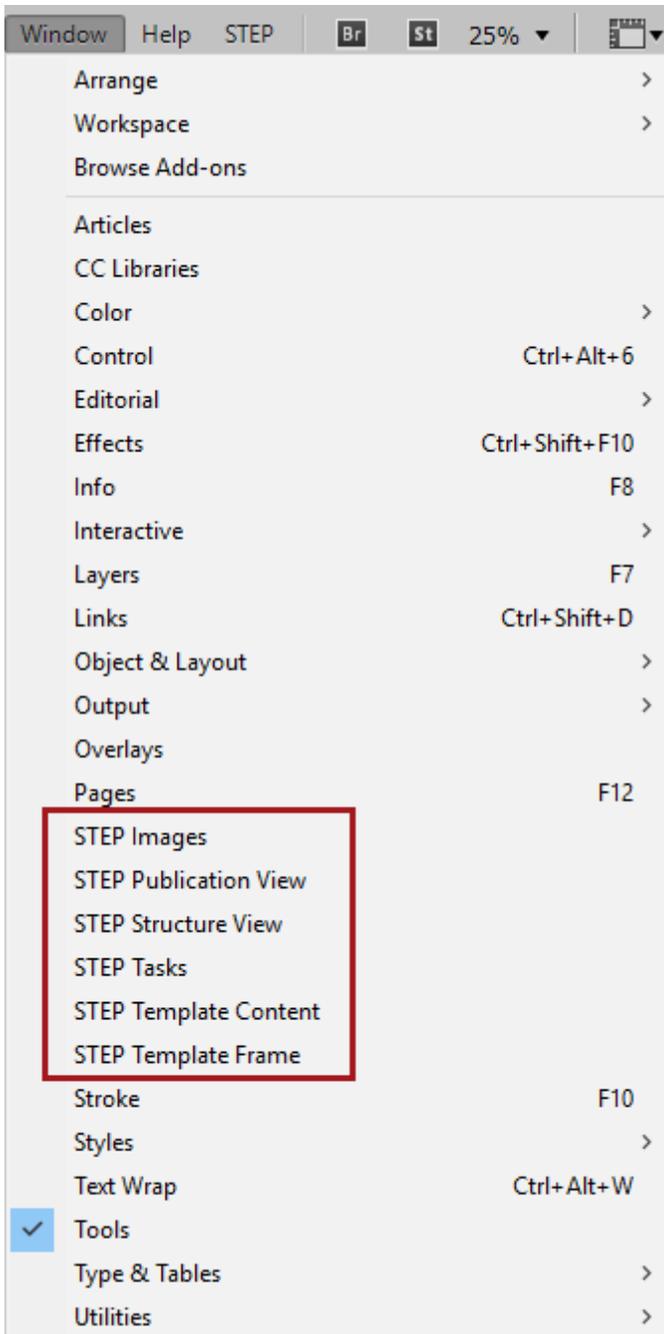
The STEP Structure View is essentially a mirror of the Tree in the workbench. It allows InDesign (DTP) users to access contents of the workbench from within InDesign without having to log into the workbench.

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.



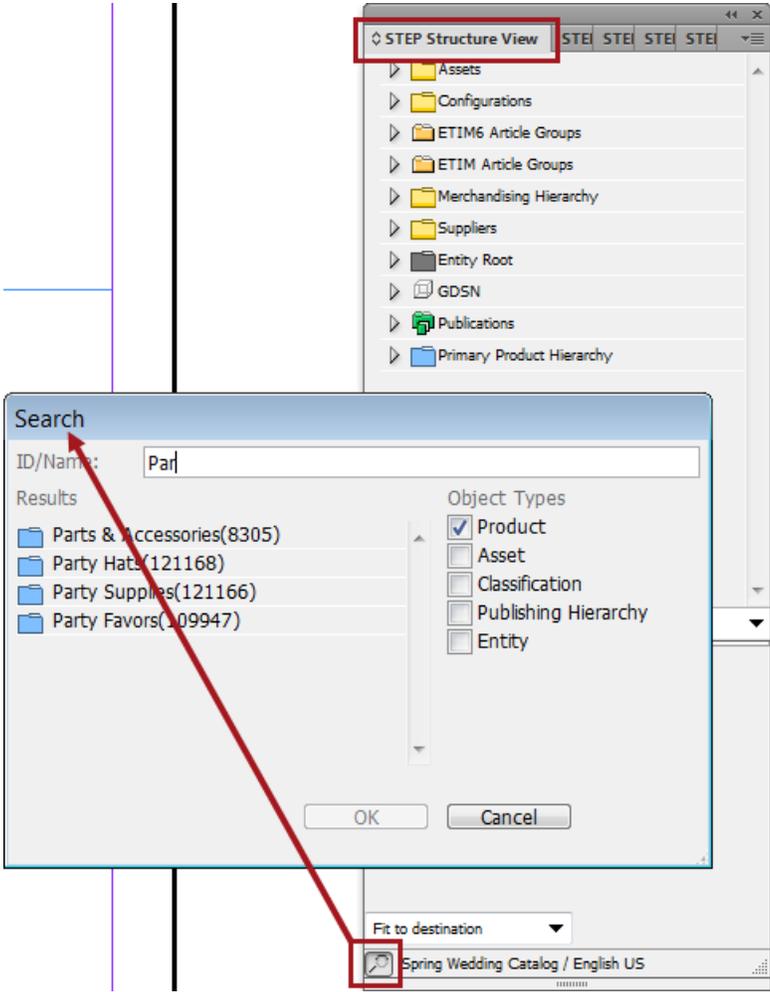
Accessing the STEP Structure View

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.



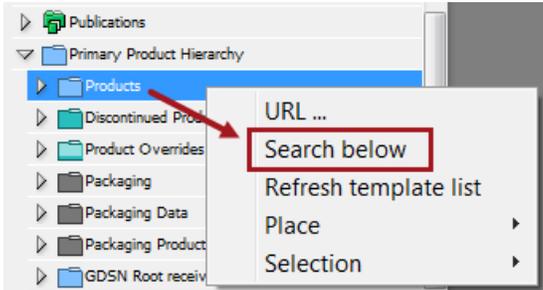
Navigation and Search in the STEP Structure View

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 arrow in the upper right corner of the panel.)



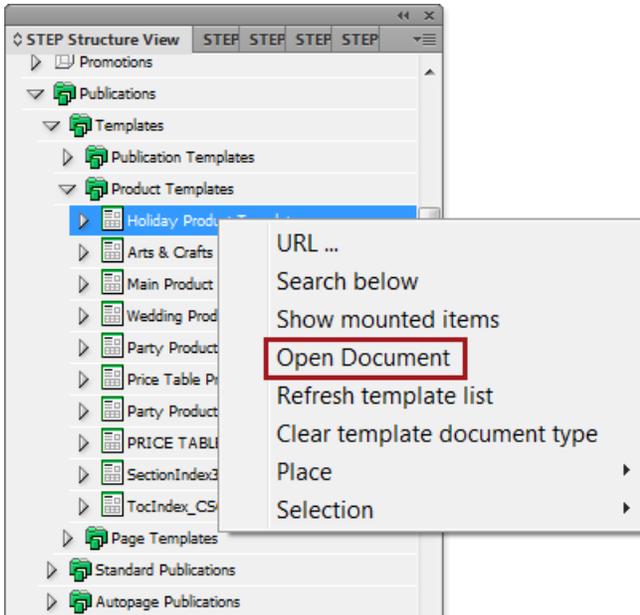
The **Search** dialog enables typeahead and filtered searches in the STEP Structure View. Searches are performed by **Name** or **ID**. Searches may be filtered by one or more of the following object types: Product, Asset, Classification, Publishing hierarchy, and Entity. Search is not enabled unless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

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. Note that there is a three-character limit before typeahead search results will populate using **Search below**.

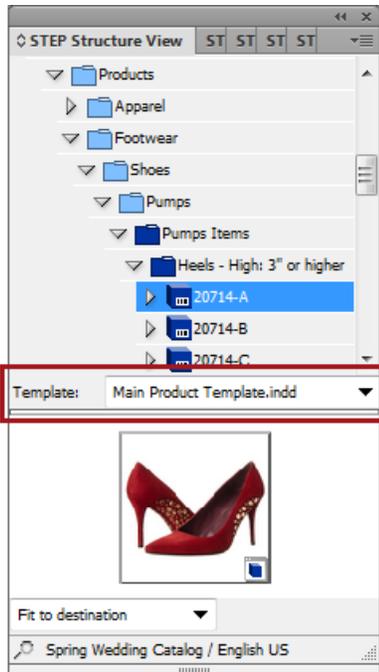


Additional Features of the STEP Structure View Panel

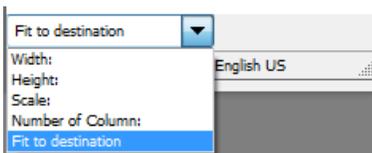
- Publication Hierarchy:** Templates and actual pages that have been saved back to STEP can be opened for editing from the Publication hierarchy. To open a template or actual page, right-click on the document and select **Open Document** from the menu.



- 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'n'design** 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 here.)
- **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:

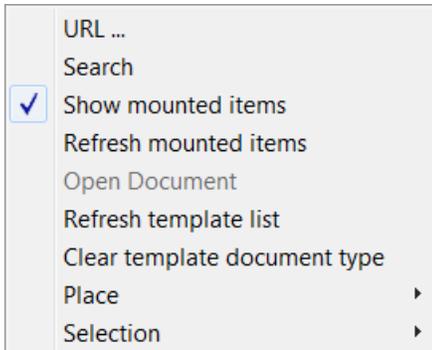


- **Width:** Sets the width of the text or image frame when dragging an attribute or asset reference directly onto a page (not into an existing frame)
- **Height:** Sets the height of the text or image frame when dragging an attribute or asset reference directly onto a page (not into an existing frame)
- **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

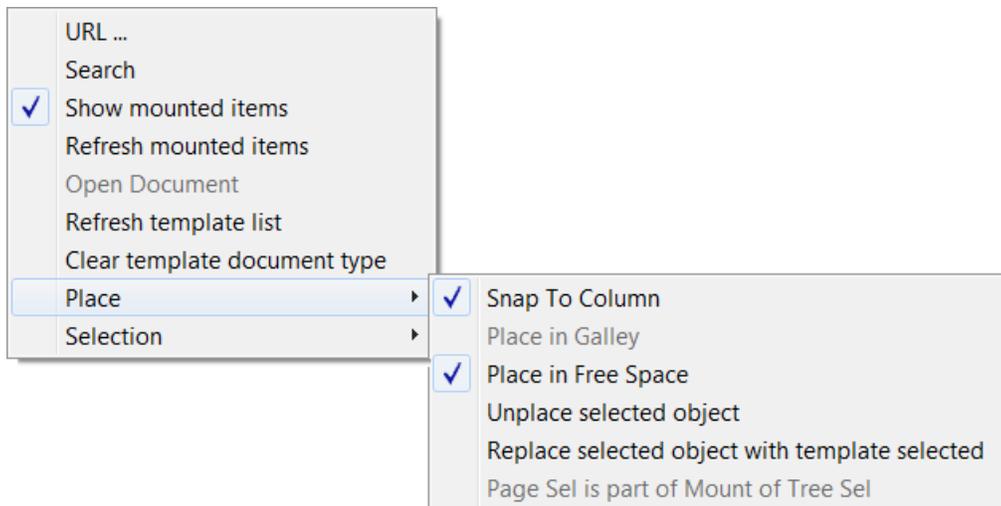
The **Options** menu in the STEP Structure View is accessed by clicking in the dropdown arrow in the upper right corner of the panel. It contains the following commands:



- **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

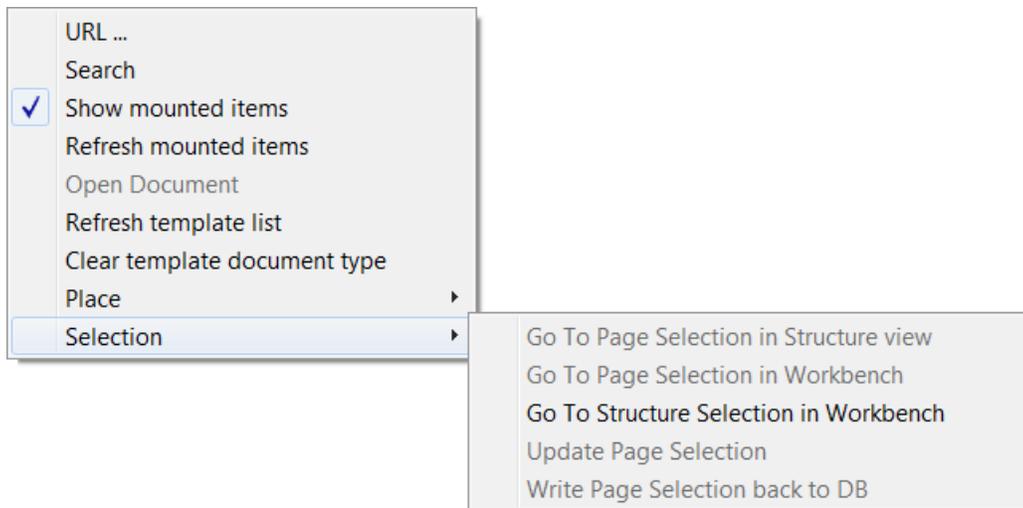
The options available in the **Place** sub-menu enable you to set a range of parameters for the mounting process, as follows:



- **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 STEP 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(ection) is part of Mount of Tree Sel(ection):** *(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 STEP 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, as follows:

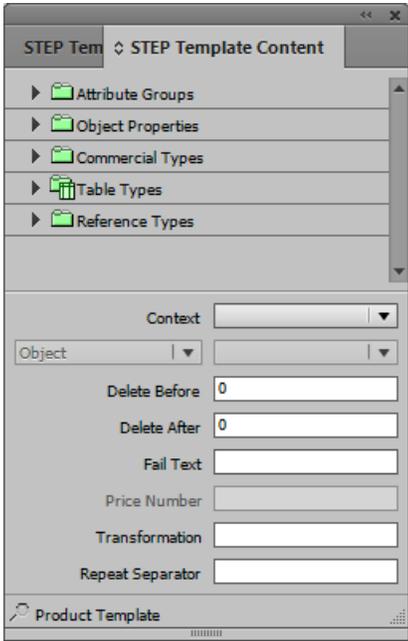


- **Go To Page Selection in Structure view:** When selected, the element you have selected on the page will be shown in the STEP Structure View tree.
- **Go To Page Selection in Workbench:** When selected, the element you have selected on the page will be shown in STEP Workbench (this requires that STEP 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 Palette

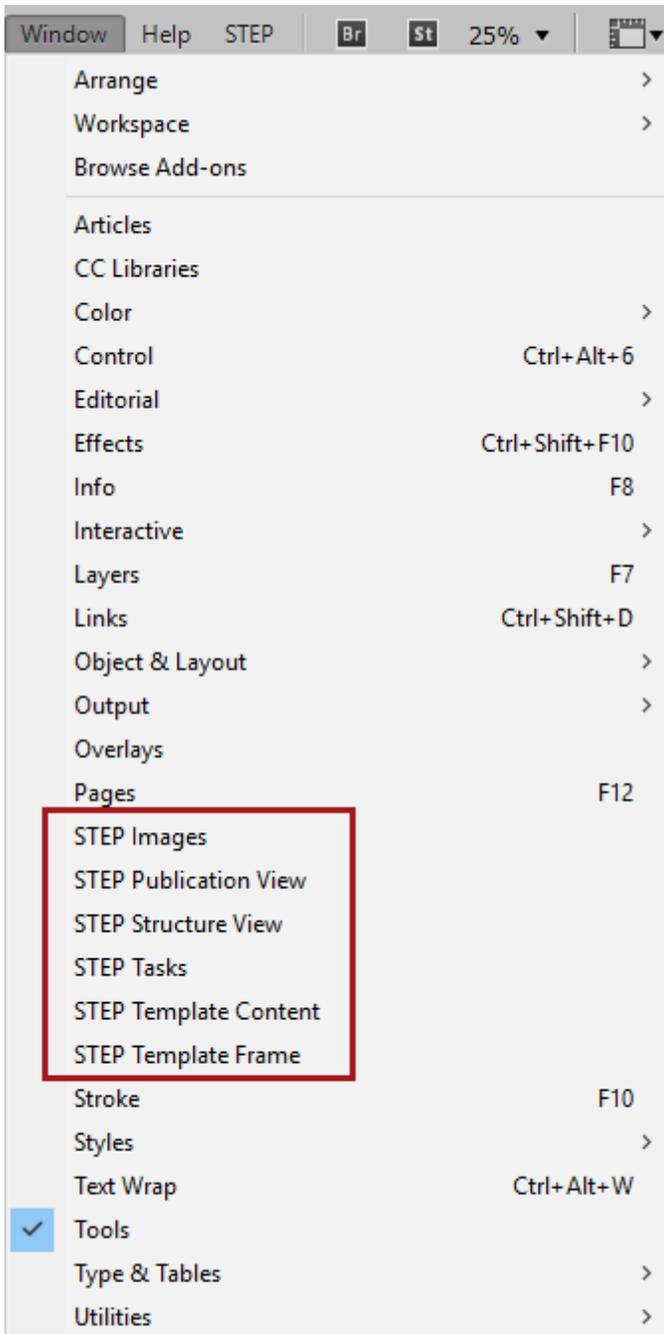
The **STEP Template Palette** (or *panel*, in InDesign terminology) is used primarily to create **product templates** in InDesign. This palette is where elements from STEP—including attributes, asset references, and tables—are linked to InDesign pages in order to build mounted pages in conjunction with **publication templates**. The STEP Template Palette can also be used to link these same elements to page templates and publication templates, though this is less common.

The STEP Template Palette mirrors many of the contents of the **System Setup** tab 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.



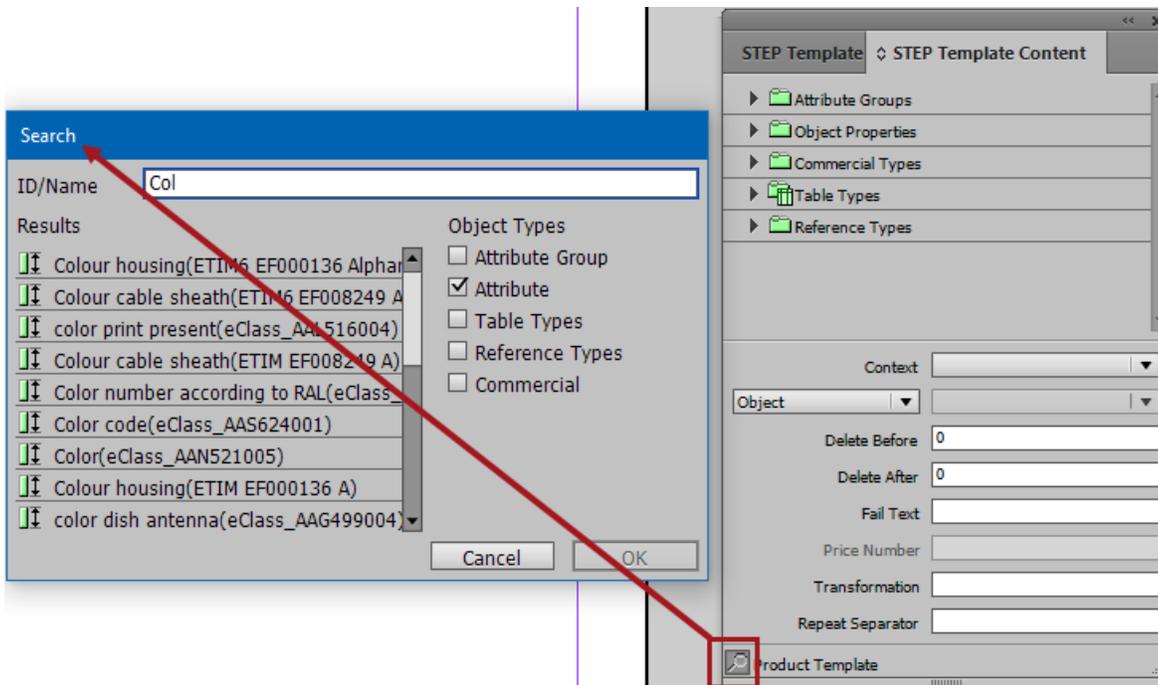
Accessing the STEP Template Palette

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



Navigation and Search in the STEP Template Palette

The STEP Template Palette 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 in the STEP Template Palette. 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.

STEP Template Palette Parameters

A range of parameters are set on **product templates**, **page templates**, and **publication templates** from the lower half of the **STEP Template Palette** 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 Palette 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 Palette 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'n'design** topics:

- Text Frame Parameters in the STEP Template Palette
- Image Frame Parameters in the STEP Template Palette
- Grouped Frame Parameters in the STEP Template Palette

Parameters Available for Page Templates

Only relevant when using the STEP Flatplanner component. For more information, see the **STEP Template Palette Parameters for Page Templates** section of the **Flatplanner** documentation 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 **STEP Flatplanner** or **STEP AutoPage** publishing components.

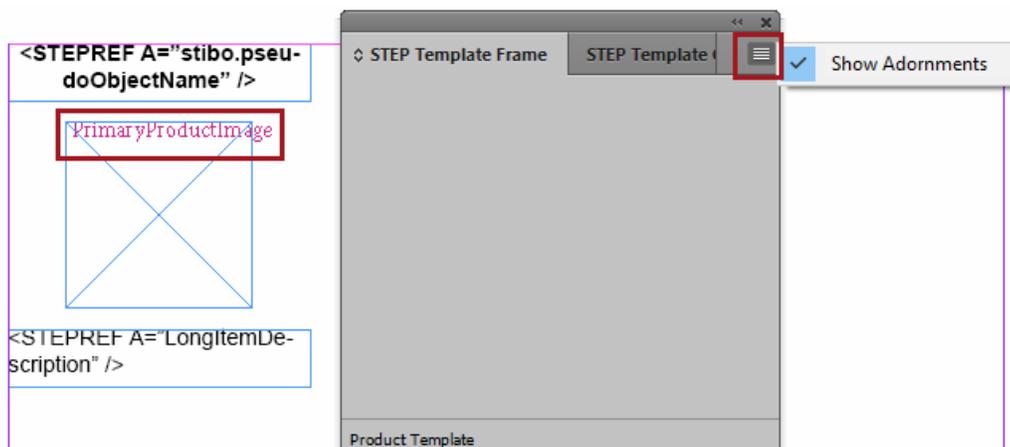
Elements added to publication templates from the STEP Template Palette are typically text frames that either display description attribute values (such as page headers) or **Product Continuation Notes** for **AutoPage** publications. Image frames may also be added to display logos or background images, 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 adding Product Continuation Notes to publication templates for AutoPage publications, see the **About Templates in AutoPage** section of the **AutoPage** documentation.

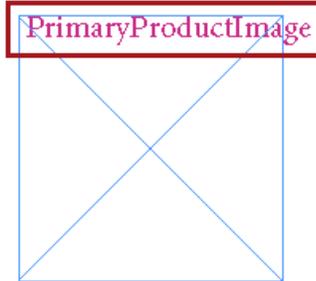
Options Menu

The **Options** menu in the STEP Template Palette (arrow in upper right corner) contains the following commands:



- Apply Condition to Selection:** This option is activated when the XML tagging for more than one attribute in a text frame is selected. You can select multiple attributes by highlighting them 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.
- Repeat Selection:** Use this option when you want to perform a repeat selection for XML tags. For more information about the repeat selection option, see the **Using the Repeat Function for Subproducts** section of the **STEP'n'design** documentation.

- **Repeat Options:** Use this option to apply styling to elements in Repeat Selection. For more information about styling, see the **Using the Repeat Function for Subproducts** section of the **STEP'n'design** documentation.
- **Show Adornments:** Use this option to display the STEP ID of the asset reference type assigned to each image frames on the product template.

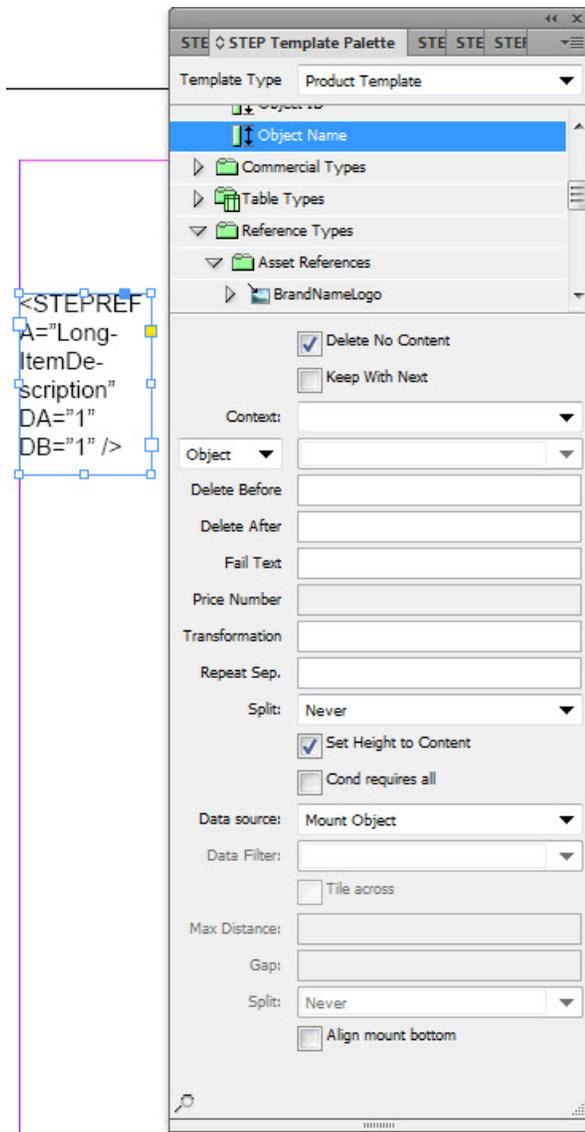


When adornments are not displayed, the asset reference type assigned to a frame can be found by selecting the frame, at which point the STEP Template Palette tree will scroll to the assigned asset reference type.

- **Group Alignment:** For information, see the **Grouped Frame Parameters in the STEP Template Palette** section of the **STEP'n'design** documentation.

Text Frame Parameters in the STEP Template Palette

Below is a description of the individual parameters available when configuring text frames using the **STEP Template Palette** 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:** 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 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.

- **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.
- **Delete Before + Delete After:** In case your attribute is empty, you can force STEP'n'design to remove some characters either before or after the location where the attribute should have been placed. This is especially useful if you have some characters, which do not make sense to have 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.

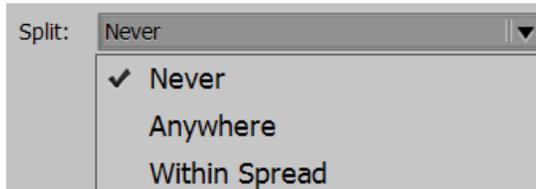
Note: In most cases you do not need to count the exact number of characters to delete, as delete before / after will not delete another attribute reference. In addition, these delete options only take effect if there is no value for the attribute.

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 STEP XML 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 here are those that transform text values into images.
- **Repeat Sep.:** 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.

- **Split:** For non-repeating text frames, three split options are available from this dropdown list: **Never**, **Anywhere**, and **Within Spread**. These settings are used to control the behavior of text frames that are too lengthy to fit entirely in a column or on a page.

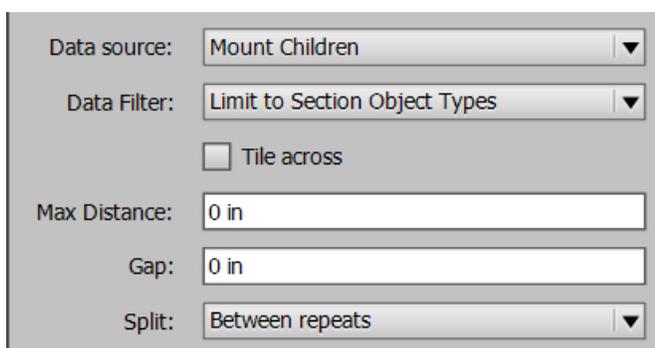


Select **Never** to prevent the text box from ever splitting across a column or a page. Select **Anywhere** to allow the text box to split across columns and pages even if the split results in the creation of a new spread. I.e., the text box will be permitted to split from a right-hand page onto a left-hand 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.

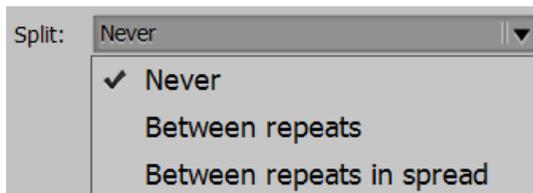
A text frame with a Split setting of **Anywhere** or **Within Spread** cannot have **Keep With Next** set, and vice versa. (Information on Split options for repeating text frames appears below in this list.)

- **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.
- **Cond requires all:**
- **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 a product / asset 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 selected, the following options are activated in the STEP Template Palette: **Data Filter**, **Tile across**, **Max Distance**, **Gap**, and **Split**.



- **Data Filter:** Choose **Limit to Section Object Types** when using the STEP REPEAT function to mount metadata attributes and/or other information from child section objects when mounting publication or section objects
- **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
- **Split:** (For repeating text frames) For repeating text frames, the three split options are **Never**, **Between repeats**, and **Between repeats in spread**.

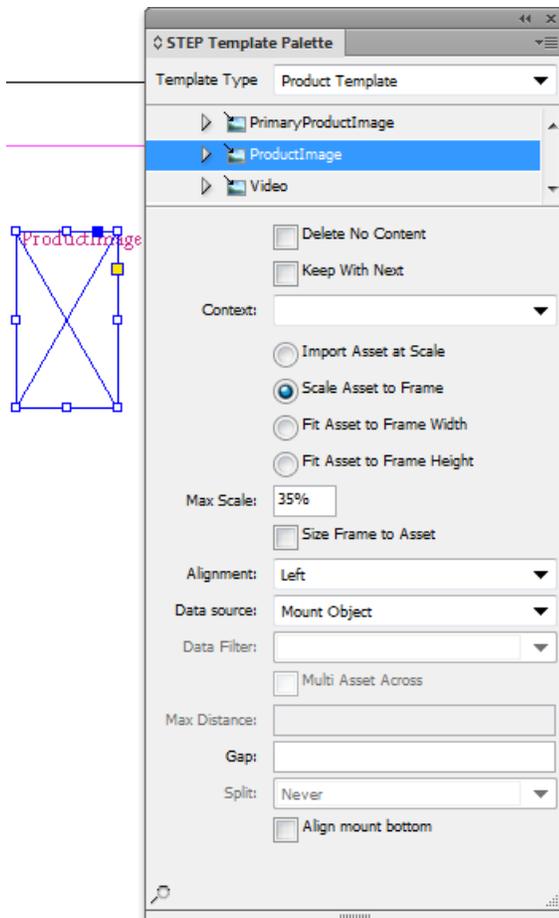


Select **Never** to prevent a series of repeating text frames from splitting across a column or page if there are too many frames to fit in one column or on one page. Select **Between repeats** to allow the series of repeated frames to split across a column or onto another page, even if the split continues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

- **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.

Image Frame Parameters in the STEP Template Palette

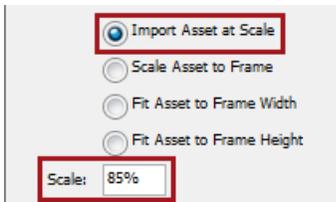
Below is a description of the individual parameters available when configuring image frames using the **STEP Template Palette** in InDesign.



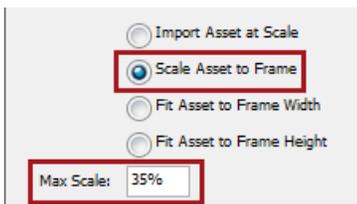
- Delete No Content:** This option can be best understood as 'Delete IF No Content.' Check this box to ensure that empty image frames do not mount on pages if there is no image of the asset reference type linked to the mounted product.
- Keep With Next:** Check this box to ensure that the selected frame 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.
- Context:** Use this option to reference an image from a specific context into your product template. If left empty, the system will mount the image from your version into the page instead. Normally, you will only choose a specific context here 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.
- Import Asset at Scale:** Image will be scaled according to the **Scale** value entered in the STEP Template Palette. 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:** 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.



- **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)
- **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.

- **Multi Asset Across:** Allows multiple images (when there are multiple images linked to a single product using the same asset reference type) to be placed inside a single frame and tiled horizontally. If not selected, the images will be composed vertically. Only available when **Import Asset at Scale** is selected.
- **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.
- **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 Palette:

Data Filter, **Tile across**, **Max Distance**, **Gap**, and **Split**.

The screenshot shows a configuration panel with the following settings:

- Data source: Mount Children
- Data Filter: Limit to Section Object Types
- Tile across
- Max Distance: 0 in
- Gap: 0 in
- Split: Between repeats

- **Data Filter:** *(For AutoPage only)* Choose **Limit to Section Object Types** when using the STEP REPEAT function to mount metadata attributes and/or other information from child section objects when mounting publication or section objects in AutoPage publications.
- **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 be 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
- **Split:** *(For repeating image frames)* For repeating image frames, the three split options are **Never**, **Between repeats**, and **Between repeats in spread**.

The screenshot shows the 'Split' dropdown menu with the following options:

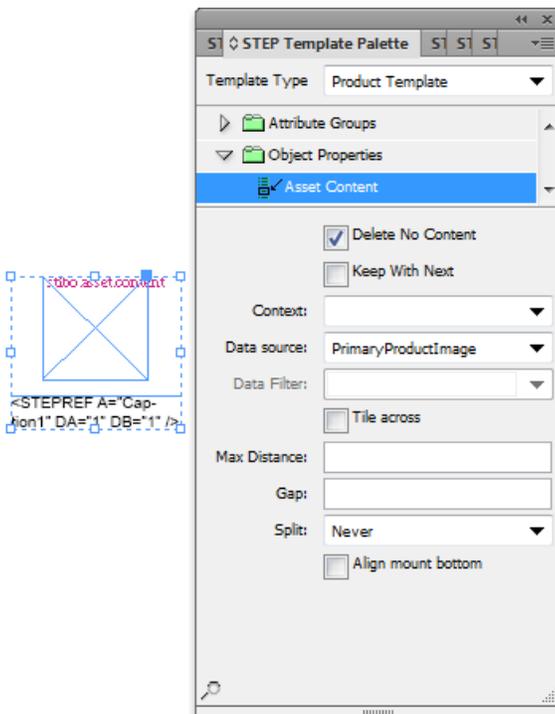
- ✓ Never
- Between repeats
- Between repeats in spread

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 **Between repeats** 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 **Between repeats in spread** only permits the repeated frames to continue from a left-hand page to a right-hand page, disabling the ability to create a new spread.

- **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.

Grouped Frame Parameters in the STEP Template Palette

Below is a description of the individual parameters available when configuring grouped frames using the STEP Template Palette 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.
- **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 content 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.

- **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 a product / asset 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 selected, the following options are activated in the STEP Template Palette: **Data Filter**, **Tile across**, **Max Distance**, **Gap**, and **Split**.

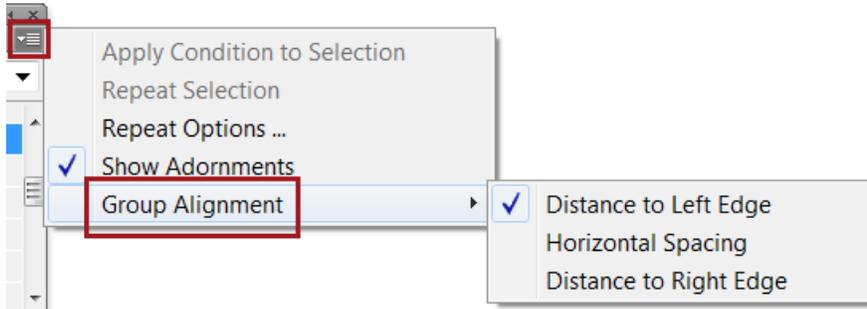
- **Data Filter:** (For AutoPage only) Choose **Limit to Section Object Types** when using the STEP REPEAT function to mount metadata attributes and/or other information from child section objects when mounting publication or section objects in AutoPage publications.
- **Tile across:** Check this box 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
- **Split:** The three split options are **Never**, **Between repeats**, and **Between repeats in 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 **Between repeats** 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. Checking **Between repeats in spread** only permits the repeated grouped frames to continue from a left-hand page to a right-hand page, disabling the ability to create a new spread.

- **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.

Group Alignment Options

The Group Alignment selections in the Options menu enable you to set additional parameters for grouped frames.

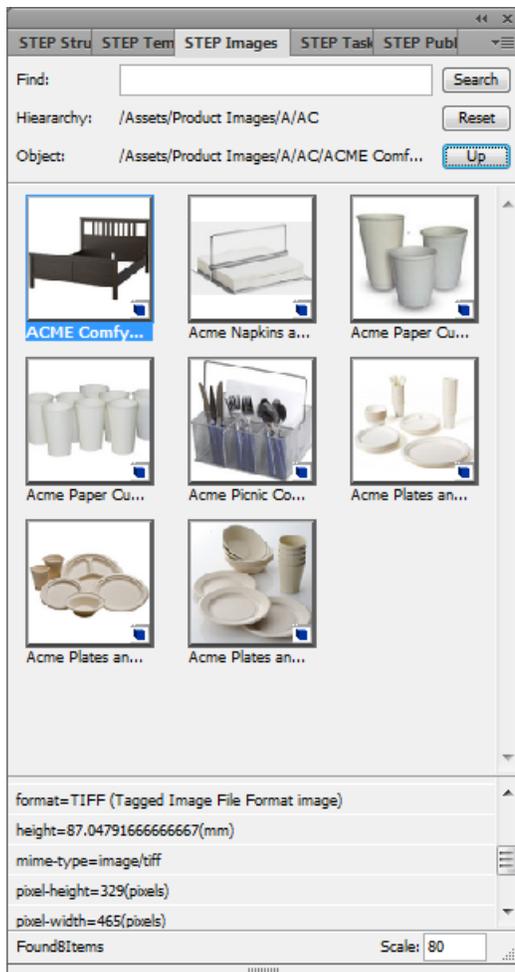


- **Distance to Left Edge:** Same distance as if items were not grouped.
- **Horizontal Spacing:** If the text is to the right of the image with a 5 mm gap and the image changes size, the text ends up 5 mm from the image.
- **Distance to Right Edge:** If the group grows or shrinks due to image size,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

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 Palette 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.

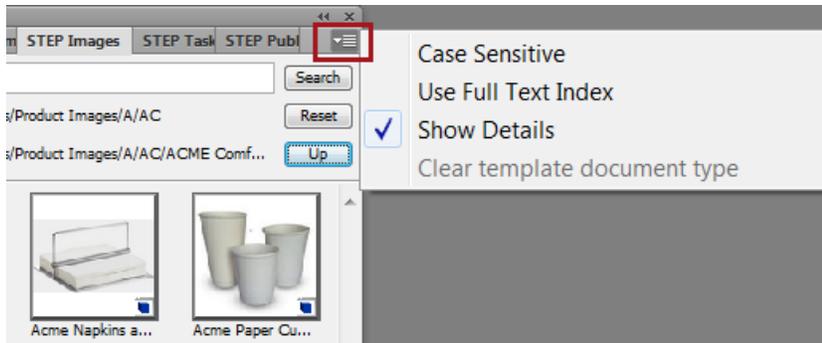
Clicking the **Up** button will bring the view one level back.

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

Options Menu

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

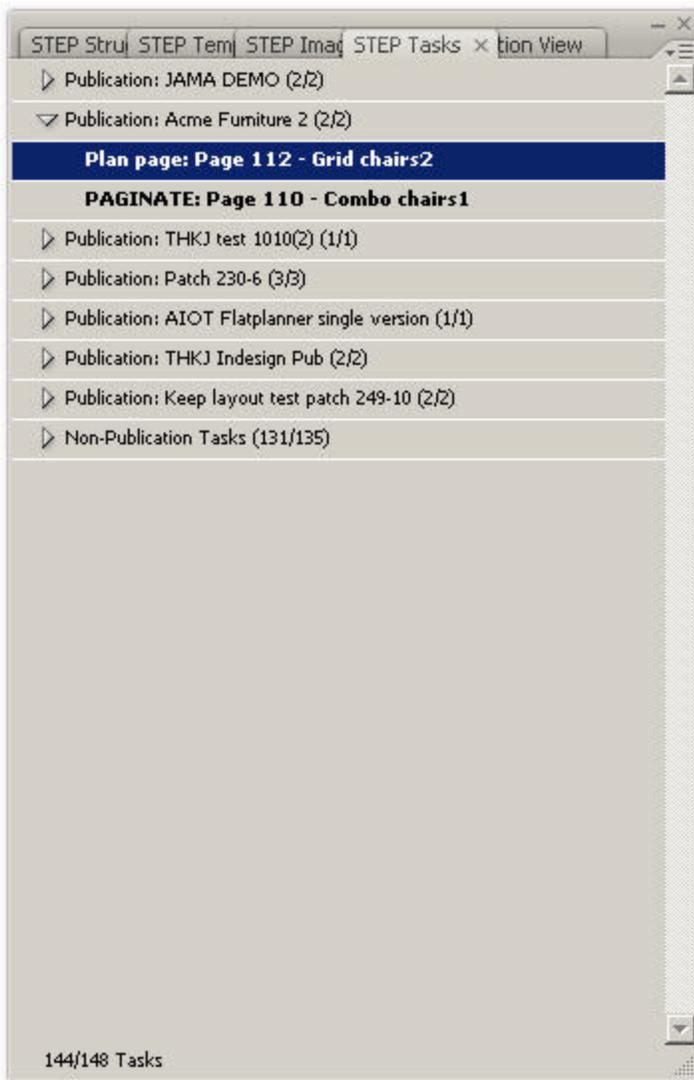
- **Case Sensitive:** Use this option to determine if you want to search in case sensitive mode or not.
- **Use Full Text Index:** Use this option to search for attribute values that are defined as full text indexable in the attribute editor in STEP. (It may take a little while to show the results).
- **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

STEP Tasks is used for DTP operators to pick up tasks available in Flatplanner workflows. DTP operators can accept tasks, submit tasks, reject tasks, etc. from this view. Typically it is used when a page has already been planned in STEP by a merchandiser user, then it goes to the DTP operator for further work.

Depending on the configuration of your Flatplanner workflow, comment fields may also be visible here.



STEP Tasks comprises a tree view of tasks similar to the STEP Workflow **Tasks** tab in STEP. The tasks are grouped by publication.

The status of the task is indicated visually by the following layout:

- If bold, the task is new and it has not been accepted yet.
- If regular (and not bold), the task has been accepted.

For more information about accepting tasks, see ["Accepting Tasks from"](#).

Options Menu

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



Accept Task: Use this option to accept a task if working in a workflow. After accepting a task, the list in the STEP Tasks tab is refreshed.

Cancel Task: Use this option to cancel a task that you have already accepted. The task is returned to the list of incomplete tasks. After canceling a task, the list in the STEP Tasks tab is refreshed.

Task Completed: Use this option 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.

Show Details: Use this option if you want to see more details about a selected task.

Refresh: Use this option to refresh the list of tasks in the STEP Tasks tab.

Goto in Structure View: Use this option to go to task object in STEP Structure View.

Goto in Publication View: Use this option to go to task object in STEP Publication View.

Goto in Image Search: Use this option to go to task object in STEP Images.

Open document: Use this option to open an attached document in an external editor.

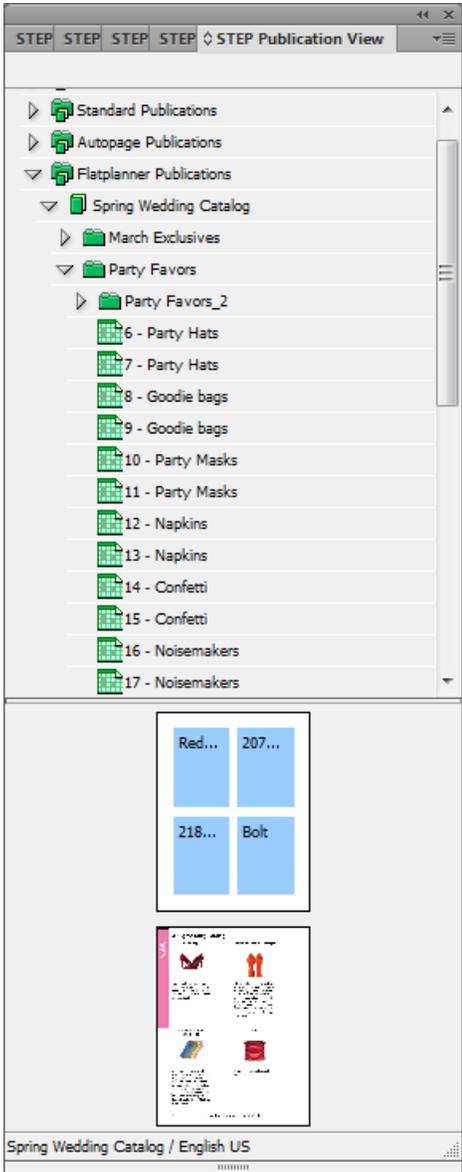
Filter: Use this option to filter your task types. A **Choose Item** dialog box appears where you can select the tasks you want to see.

STEP Publication View

The STEP Publication View panel is used in conjunction with the STEP Flatplanner publishing component.

STEP Publication View is used to view the Publication hierarchy in STEP.

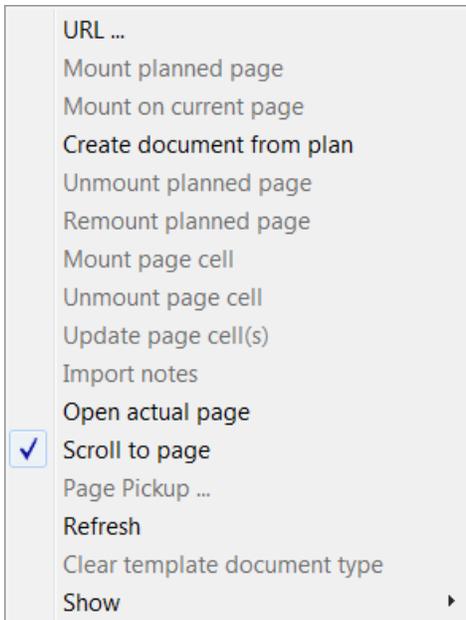
Note: Search functionality is not available within the STEP Publication View panel.



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

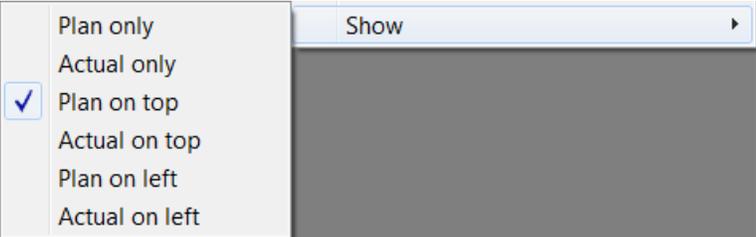
The **Options** menu in the STEP Publication View (arrow in upper right corner) contains the following commands.



- **URL:** Selecting this option allows you to 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.
- **Mount planned page:** Use this option to mount a planned page.
- **Mount on current page:** Use this option to mount a planned page on a specific page, e.g. page 3 in your InDesign document.
- **Create document from plan:** Use this option to mount the plan using the publication template saved in STEP.
- **Unmount planned page:** Use this option to remove mounted plan on 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:** Use this option to mount a page cell if you have mounted a Flatplan and selected a cell in the Preview area (lower area of the STEP Publication View).
- **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 cells if you have mounted a Flatplan and 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 - Currently 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.



Product Templates

This section describes how to create a product template and how to store a product template locally and/or in STEP.

Product templates are used whether you use InDesign with or without STEP Flatplanner and STEP AutoPage. The advantage of using a product template is that it enables you to mount specific product data from one or several products directly to the page in one operation.

You can work in InDesign without using a product template, but it is strongly recommended to create product templates, as you can mount one or several products directly to the page in one operation. If you mount without using a template, you can only mount data one attribute / reference at a time.

Using the product template, you can control:

- Which attributes are part of the product presentation.
- How the product presentation is formatted in terms of fonts, styles, etc. by applying style names to the content and frames.
- How the individual elements are positioned.

Note: Before you can use the product templates together with STEP Flatplanner and STEP AutoPage, the templates must be saved to STEP.

The general method for linking a STEP element into a product template includes four operations:

1. Drawing a text frame or an image frame on your InDesign page.
2. Determining which database element (such as attribute or image) you want in the template, and which parameters apply to it.
3. Dragging your definition into the frame.
4. Applying style names to the content or frame to be able to apply InDesign formatting such as style, font size, indent, frame border etc.

Creating a Product Template

STEP'n'design enables you to mount fully made-up product presentations directly to the page. In order to do that, you must first define one or several product templates, which the product will be mounted according to.

This section contains a description of how to:

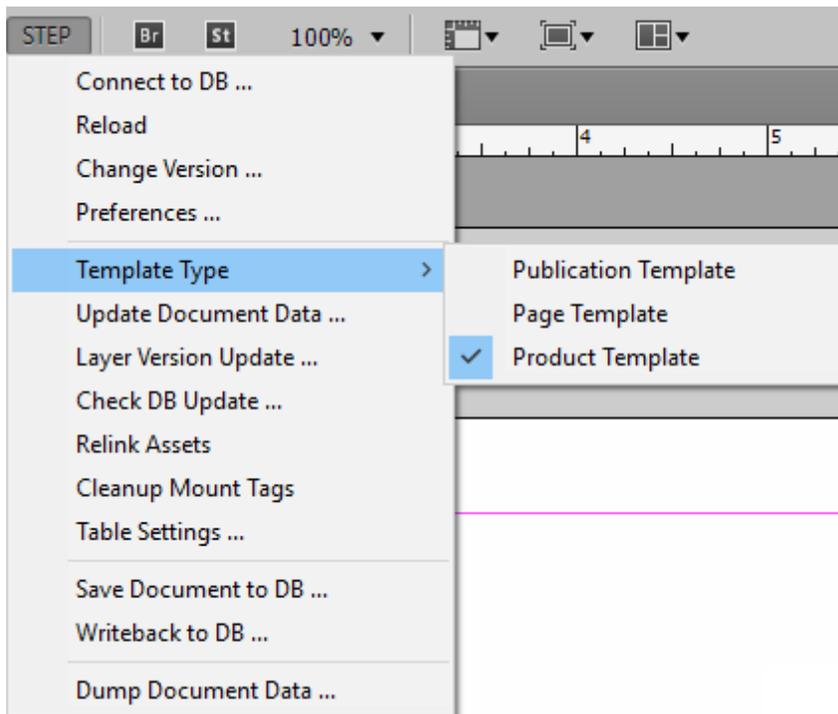
- Draw text frames in InDesign
- Determine frame content
- Link STEP data into frame
- Edit STEP tags within an InDesign text frame
- Draw image frames in InDesign (create template elements for images)

- Create product template containing galley text
- Create layers

Note: As you work with your product template set-up, it is recommended that you save your work as you go along. As the product template is a normal InDesign document, you can save it as a normal file anywhere on your hard drive.

Designating the Template Type

1. Navigate to STEP > **Template Type**
2. Select **Product Template** from the STEP menu



Draw a Text Frame

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

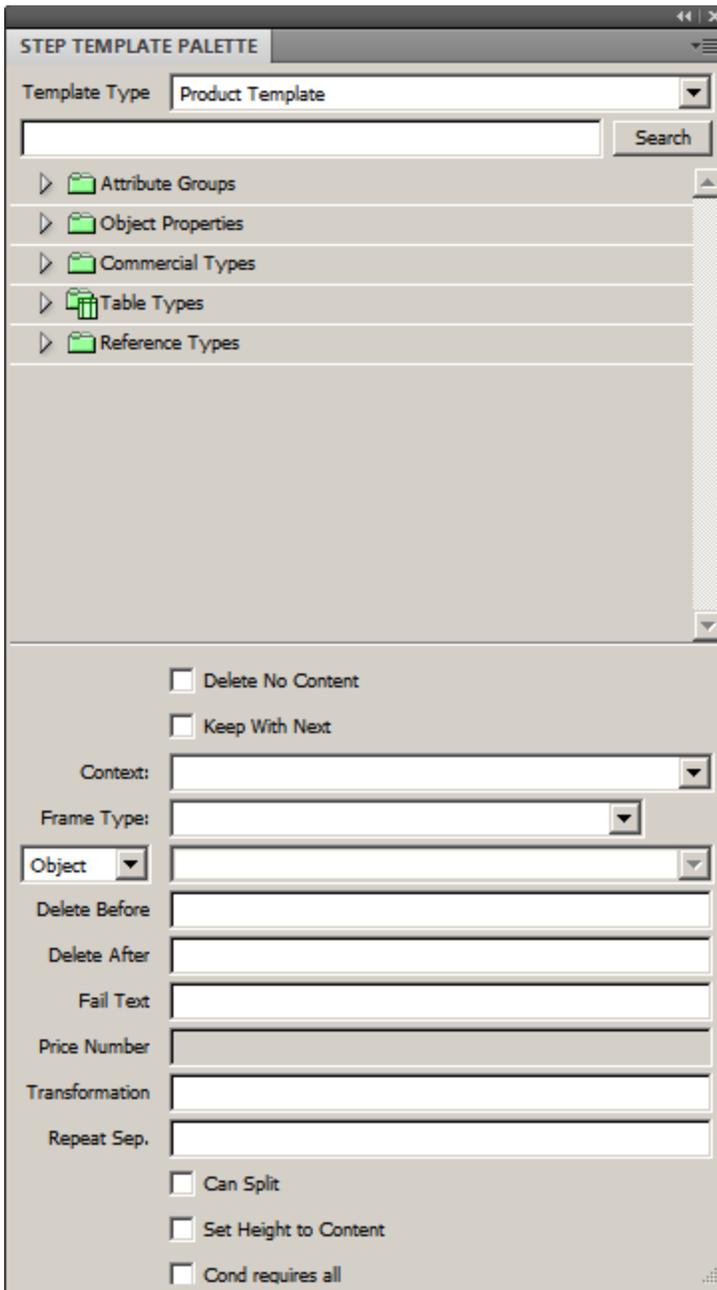
The width and the height of the frame should be the correct width/height for your future output, unless you have set the height to be auto-adjusted by STEP'n'design depending on the data mounted into it.

For information about drawing an image frame, see , see ["Creating Template Elements for Images"](#) on page 65.

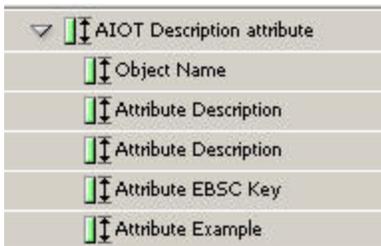
Determine Frame Content

To determine what content to put in the created frame:

1. Put the cursor in the frame to which you want to add content.
2. If not selected, click the **STEP Template Palette**.



3. Select what you want to put into the template frame: Attributes, Product ID/Name, tables or Commercial Data (Term-lists).
 - Attributes are found in the Attribute Groups hierarchy. The Attribute hierarchy shows the valid metadata for Attributes as children of each Attribute. Expanding the Attribute hierarchy, you can also add an Attribute metadata property to a template.



- The ID or name of the product you are using can be put into your template using Object ID or Object Name, respectively. ID's can be found under Object Properties hierarchy.
- Tables can be found in the Table Types hierarchy.
- Commercial Data can be found in the Commercial Data hierarchy.

Note: Text frames cannot have images added, unless an image frame is embedded into the text frame. For more information about creating template elements for images, see '[Description of the InDesign Interface](#) on page 14.

1. Once you have selected which element you want to link into your product template, you can optionally set a range of parameters (lower half of the **STEP Template Palette** panel) to control how the element is referenced into the product template.

For example, template parameters can control the behavior of your database element by scaling the text box to the size of the text, or allowing the text box to split if it reached the bottom of a column.

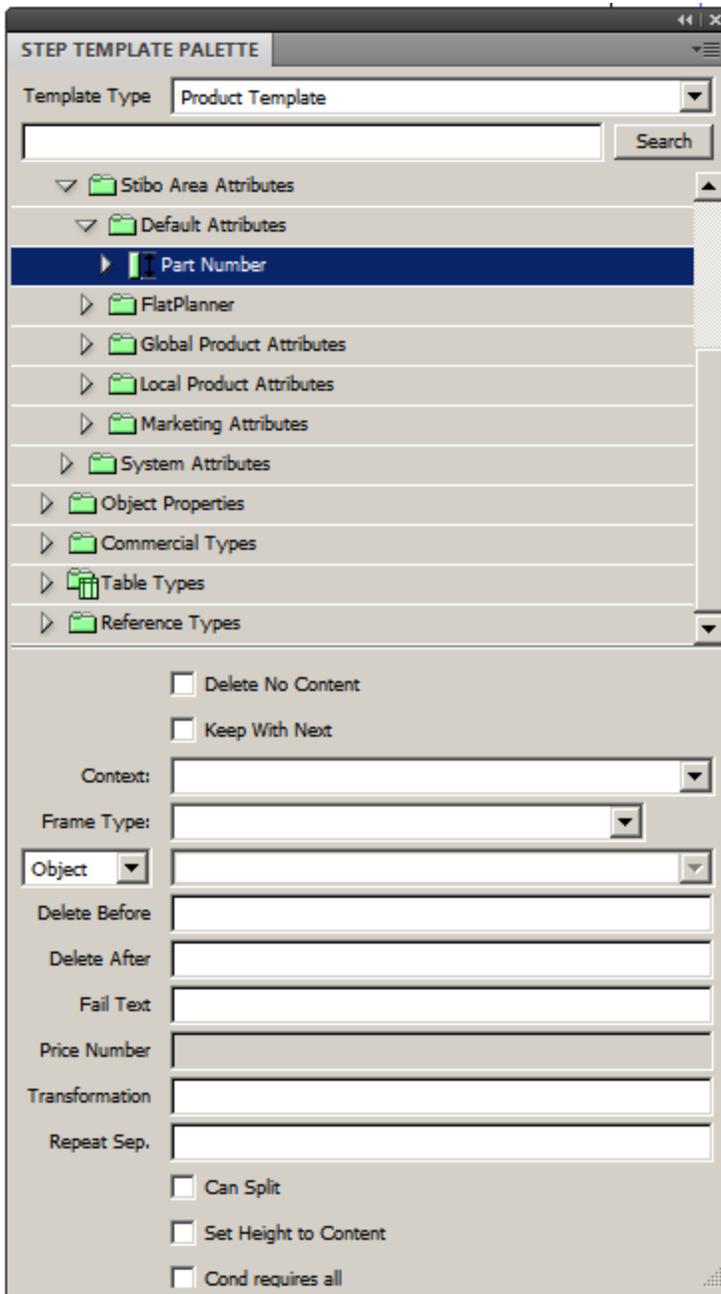
For more information about the individual parameter '[Description of the InDesign Interface](#) on page 14.

Link STEP Data Into a Text Frame

Once you have selected your STEP element and set the correct parameters for it, you are ready to link it into the product template.

- The actual linking is a drag and drop operation. Drag the attribute from the **STEP Template Palette** and into the created InDesign text frame.

When the element is dropped, the definition will appear as a STEP XML tag within the text frame.



```
<STEPREF A="Part Number" />
```

Edit STEP Tags within a Text Frame

After STEP data is linked to a frame it is possible to perform a range of modifications and operations to the text frame and the STEP XML tag itself. Among the most important are:

- Insert additional attributes, product names and tables into existing frame.
- Add plain text and characters in-between STEP XML tags.
- Use the “repeat” function to let XML tags be repeated for sub-products.
- Edit the XML tags freehand.

Insert Additional Attributes into Existing Text Frame

You can link (drag and drop) as many STEP elements as you want into the text frame (overset text is allowed in the text frame).

- To add an additional text element, repeat the linking STEP data procedure (see "[Link STEP Data Into a Text Frame](#)" on page 62), and drag your new STEP element into the text frame.

Note: In the InDesign text frame, the element can exist before or after other elements, but not within/overlapping.

Add Plain Text and Characters Between STEP XML Tags

Using the normal editing features of InDesign, you can add plain text or characters such as new-line, tab, empty lines, etc. to the text frame. This means that you can separate multiple attributes (i.e. multiple STEP XML tags) by tab, space, new-line character or really any other text string of your choice.

The characters you add into the text frame manually, will be used every time the template is utilized to mount products on a page.

See an example of adding plain text and characters in-between STEP XML tags below:

```
<STEPREF A="stibo.pseudoObjectName" />¶
<STEPREF A="MarketingText" />¶
Price this week: <STEPREF A="Price" />$¶
<STEPTABLE TT="SpecificationTable" />#
```

In this example:

- a template text frame has been set up.
- STEP XML tags have been created by dragging and dropping definitions for product name, the attribute Marketing Text, the attribute Price and a table type called SpecificationTable.

Notice how a paragraph-character separates all data structures and how some plain text has been added as a prefix to the Price attribute. Likewise, the currency symbol for price has been applied directly in the template.

Edit XML Tags Freehand

Though the normal way of maintaining the STEP XML tags in the text frame is by dragging the definition across from the **STEP Template Palette**, it is also possible to change or add tags manually. Just 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" />`, make sure that the name of attribute as well as XML syntax is correct.

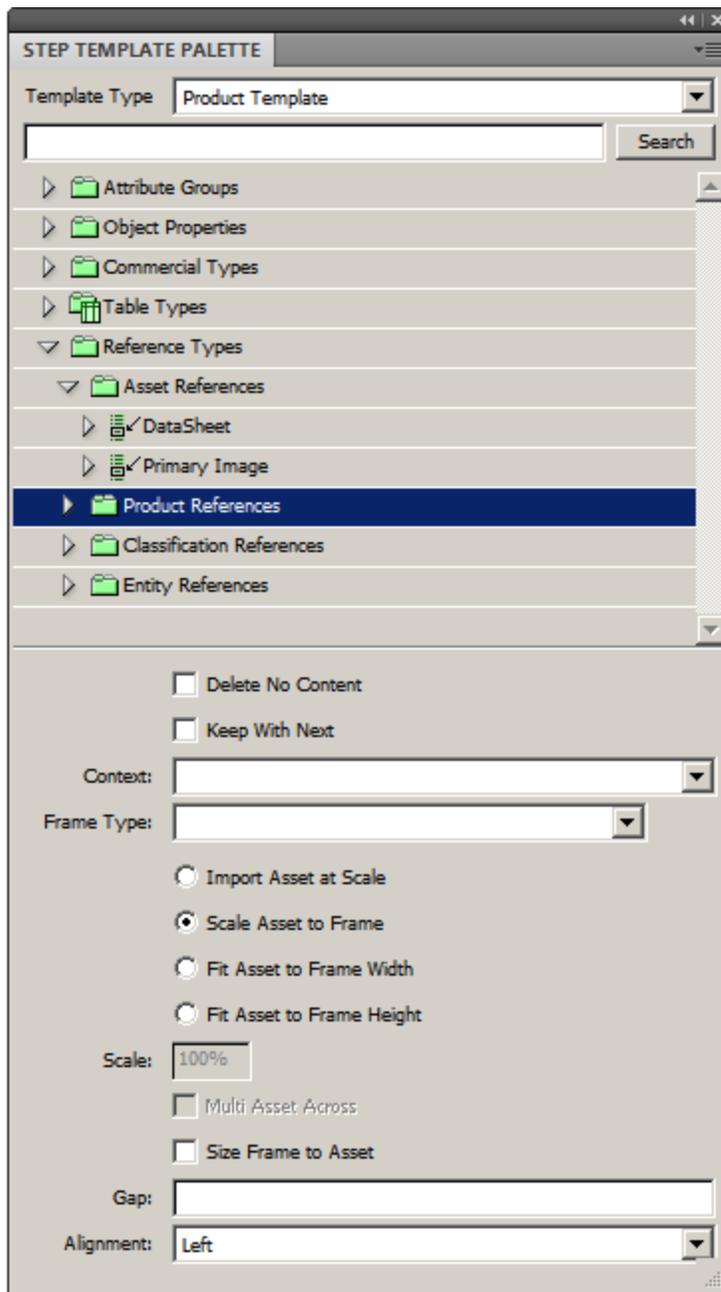
Note: When placing the cursor in the XML text it is also possible to edit XML tags using the STEP Template Palette.

Creating Template Elements for Images

Images are built into the product template in much the same way as text elements (typically attributes) are.

To apply an image to your product template:

1. Draw an image frame on the product template using the Rectangle Frame Tool (F).
2. To determine your image frame content, click the **STEP Template Palette**.



The system automatically displays the valid choices for the image frame setup.

- Optionally, you can set a range of parameters (lower half of the **STEP Template Palette** tab) to control how your image frame is referenced into the product template.

For more information about the individual parameters, see ["Description of the InDesign Interface"](#) on page 14.

Creating Product Templates Containing Galley Text

The procedure of creating a product template containing galley text is the same as if creating any other product template, except that it can only have one text frame defined. You can link as many attributes into the text frame as desired. See the **Galley Product Templates** section of the **Flatplanner** documentation for more information.

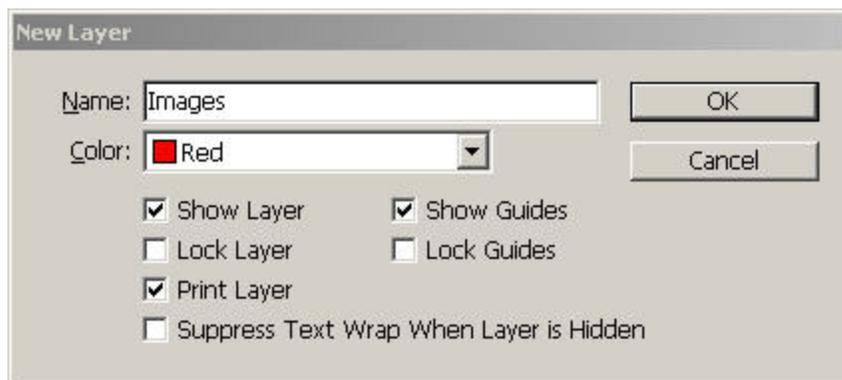
Creating Layers

When creating a product template it is possible to work with more layers, e.g you can create a text / language layer and an image layer if you want to separate your images. This is useful in case you want to create catalogs in different languages but use the same images for all of them.

To create a new layer, do the following:

- Ensure that the relevant product template is opened.
- Click the **Layers** tab, expand the Options menu, and then click **New Layer**.

A **New Layer** dialog box appears.



- In the **Name** field, type a name for the new layer, e.g. 'Images,' and then click **OK**.
- You now create the relevant frames, determine frame content, link STEP data etc. as previously described in this section.

Important: When creating different layers in a product template you must remember to map the layers in the publication. If the layers are mapped correctly, the elements will automatically be placed on the defined layers when mounting products. For more information about creating publications and layer mapping, see the STEP User Guide.

Product Template Layout and Formatting

After creating a product template and defining which elements (attributes, images and other elements) should be part of your product template, it is possible to define how the data should be formatted once it comes across to the InDesign page, hereunder:

- How to apply style name to the content or frame.
- How to position text and image frames within the product presentation.

Below you will find information about how to apply style names to content or frame and how to position and group frames on the product template.

Applying Style Name to Content or Frame

In your product template you can have several text or image frames. To make these frames and their content appear in a certain way you must define style names on your template and apply them to the frames.

Note: Ensure that styles—with corresponding style names—are defined in the publication template. You can also define all styles in the product template and then load them to the publication template—or vice versa (When using STEP Flatplanner the styles must be defined in the publication template). Defining styles in a product template is identical to the procedure of defining styles in a publication template. For more information, see ["Publication Template Layout and Formatting"](#) on page 82.

To define the style names do the following:

1. Create the needed style name, either:
 - paragraph style name (to format contents of a text frame)

Note: The process of applying style names to STEP content is case-sensitive, therefore you must be familiar with the 'tag' naming in STEP in order to use paragraph styles successfully.

- or object style name (to format image or text frame)

2. Select the relevant content / frame and then apply the created style name on it.

Positioning Text and Image Frames

The STEP'n'design product template also enables you to position the individual frames, effectively enabling you to assign a layout to the general product page presentation.

For some publications, this functionality means that you can build templates in such a way that a product can be mounted onto the page with a perfect or near-perfect layout. You can even build multiple templates, and when mounting, you can select the template most appropriate for the kind of catalog you are building

Positioning Frames

Once you have built a product template with some image and text frames, you can determine their position-relationship (i.e. distance between the individual frames) by simply 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.

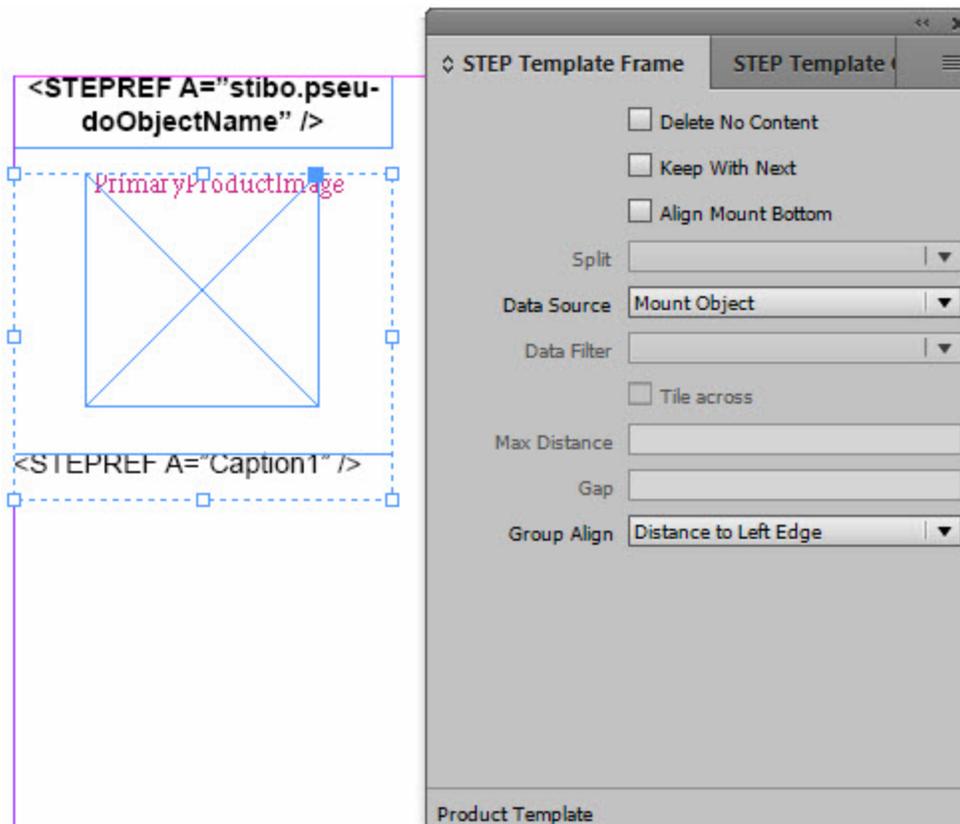
Note: When organizing and positioning your frames, you can use standard InDesign functions such as aligning, grouping and rotation.

Grouping Frames

When the product template has been built with all needed frames containing products, tables and images, it is possible to group the frames.

To group frames do the following:

1. Multi-select the relevant frames by holding down Shift button and clicking on each frame.
2. In the **Object** menu, click **Group** (you can also just press **Ctrl G** on keyboard if using a PC, or **Apple G** if using Mac) to group the frames.
2. In the **Item** menu, click **Group** (you can also just press **Ctrl + G** on keyboard if using a PC, or **Apple + G** if using Mac) to group the frames.
3. Clicking a grouped frame will enable options in the **STEP Template Frame** palette, where you can specify from where the template contents should be mounted.



For more information about the individual parameters, see ["Description of the InDesign Interface"](#) on page 14.

Storing your Product Template

Once you have created a product template, you can:

- Store the product template on your own hard drive and use it for mounting products from your own computer.
- Upload the product template to STEP, which means that other users can use of the template, and that the template can be used with STEP Flatplanner.

Storing Product Templates Locally

To store a product template on your local computer:

- Save it as a normal InDesign file into a directory or folder on your own hard drive.

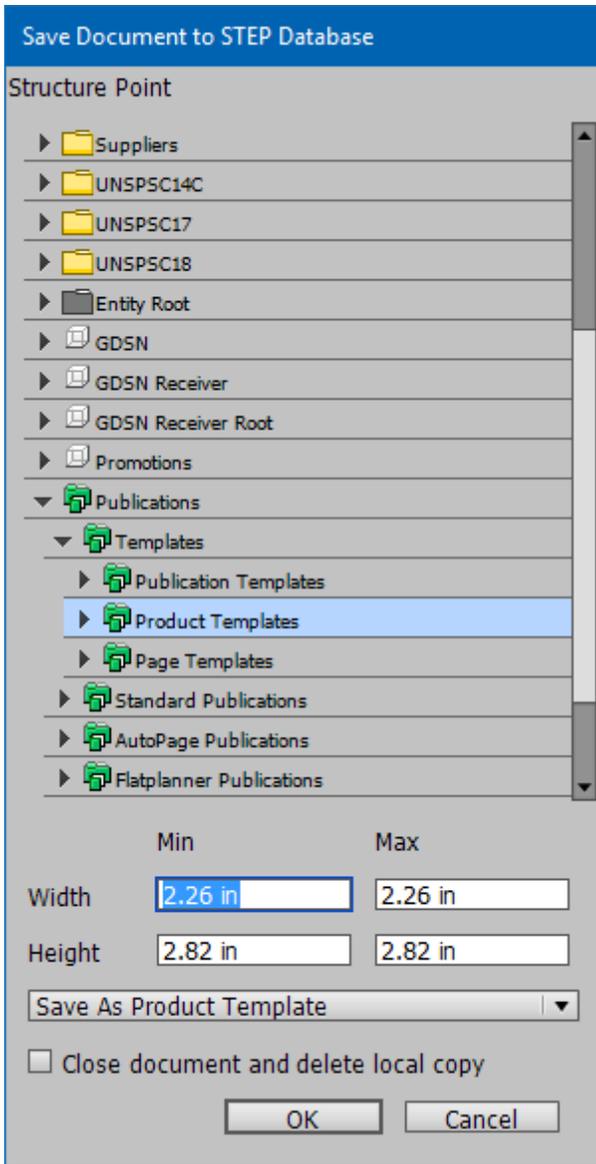
Note: To be able to use the Product template for page mounting, remember to set the **Template Path** in the **Preferences** dialog box (**Preferences** command in the **STEP** menu).

Storing Product Templates in STEP

To store the template in STEP database:

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 a publication group you want to save the document to, and then click **Save as Product Template** from the list. This way you keep publications and relevant templates together.

Clicking **Save as Product Template** will make the product template selectable for other STEP users.

Note: If you want to create a new publication group for your templates, you must do so in STEP.

4. Optionally, you can specify a Minimum and Maximum value for the product template's dimensions by entering the values in the **Min/Max** value fields for the **Height** and **Width** dimensions. The Min/Max dimension values can be used in Pagination rules. For more information on Pagination Rules, see **Pagination Rules for Flatplanner** in the **Flatplanner** documentation and **About AutoPage Pagination Rules** in the **AutoPage** documentation.

Note: The **Min/Max** value fields for the **Height** and **Width** dimensions are prepopulated based on the dimensions of the total content of your product template. These values can be overridden by entering new values in the fields.

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

Creating a Table of Contents Product Template

Product templates that mount tables of contents in publications can be created in STEP'n'design. 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 also 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.

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 a table of contents mounted from a publication object:

Toc Index	
Garden Tools	4-13
Weed Trimmers	4-13
Electric	7-10
Gas Powered	11-13
Gloves	15-21
Adhesives	17-21
Adhesive Removers	18-21
Power Tools	22-21
Hand Tools	24-25
Safety	14-15
Safety Apparel	0-0
Hard Hats	0-0
Safety Equipment	14-15
Flares	0-0
Toolboxes	2-3
Nails and Screws	3-3

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.

This topic explains how to mount a table of contents using standard STEP'n'design 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.

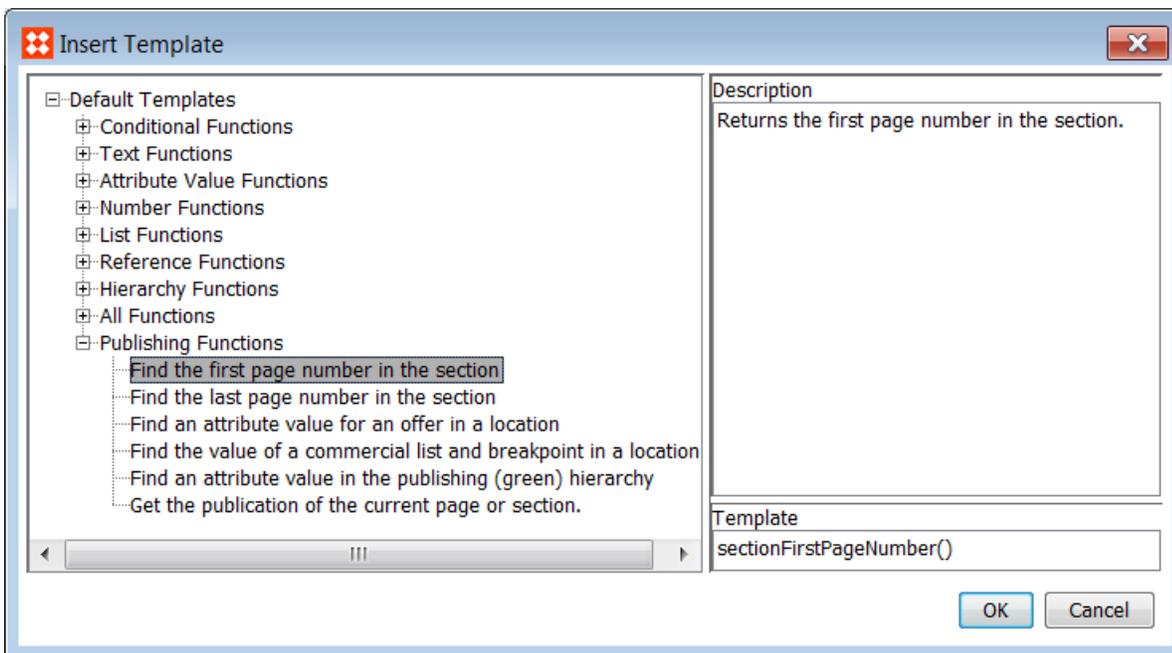
Note: Names of sections and subsections are mounted in alphabetical order in tables of contents / section indexes.

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:

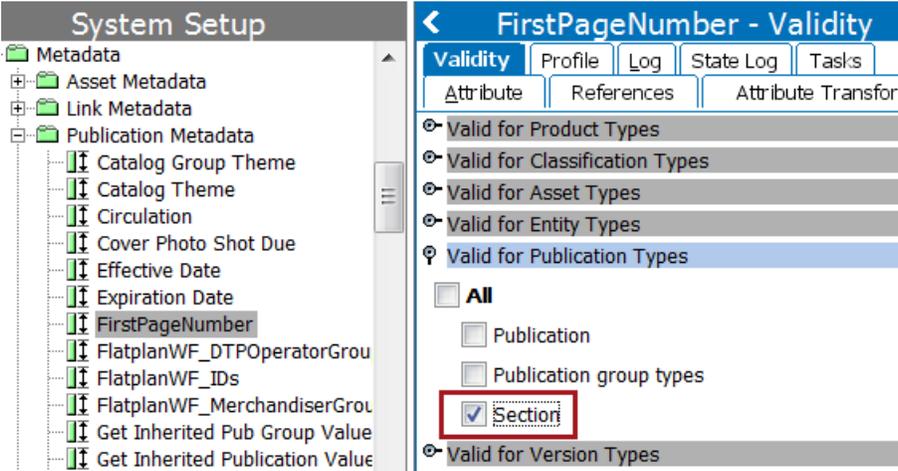
1. Create a Description attribute by the same method that you would create any other description attribute. (See the **Creating Attributes** section of the **System Setup / STEP Super User Guide** documentation for more information.) Give it a name that indicates what it is used for, e.g., FirstPageNumber.
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.



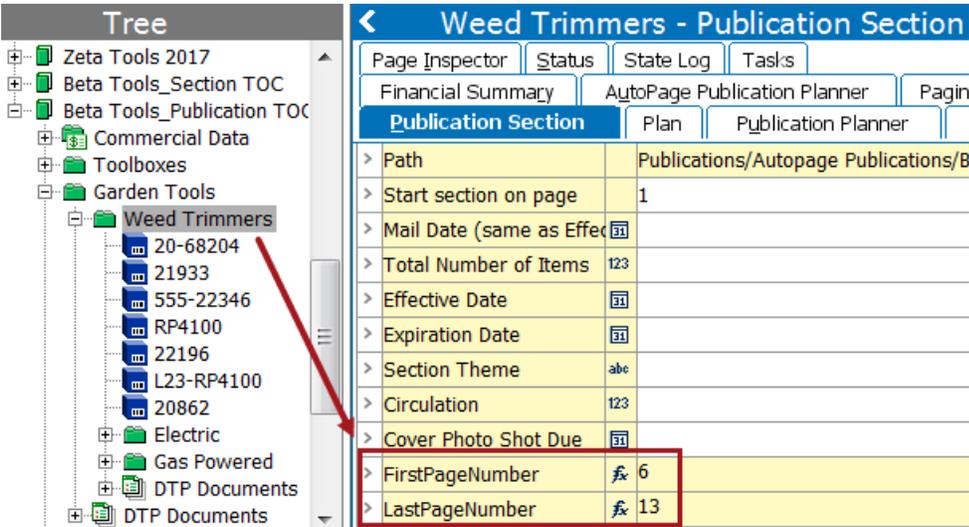
5. No additional action is needed in the **Function Editor**, so click **OK** to close it.
6. To create the second calculated attribute—which will pull the last page number in the section—the steps are identical to 1 - 5 above, except in step 4 you will select 'Find the last page number in the section.'

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.

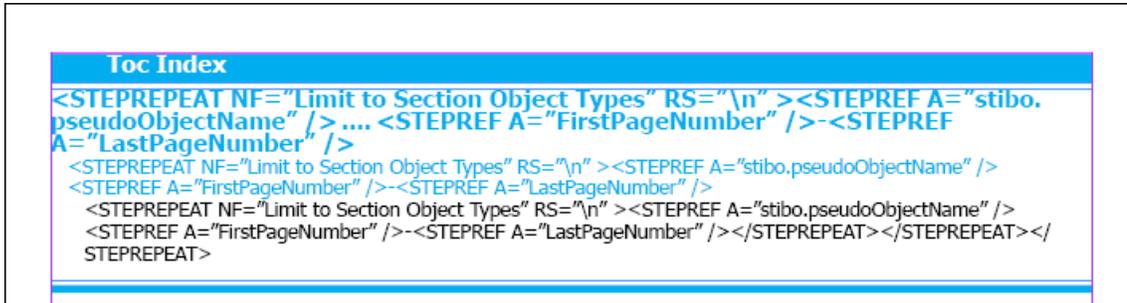


8. When actual pages have been saved to STEP into your section, the calculated attributes will display page numbers as such:



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, etc., 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** section of the **STEP'n'design** documentation.

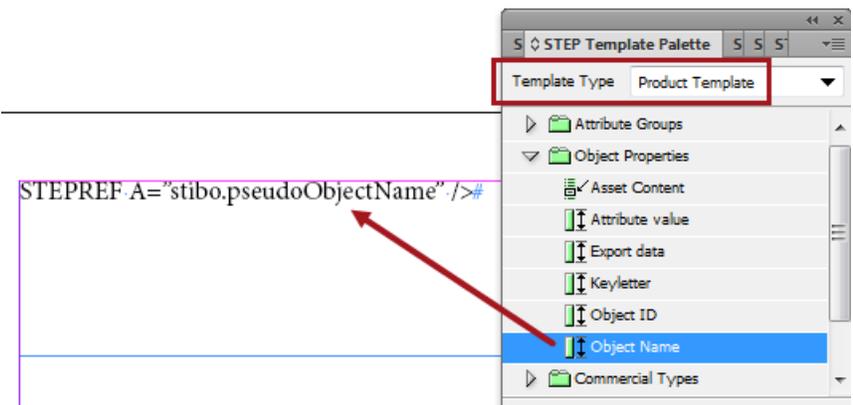
The sample pictured above is designed to mount three levels of subsections by using the **Repeat Options** available in the **STEP Template Palette**. The following text is the content that appears in the above screenshot:

```
<STEPREPEAT NF="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObjectName" />
<STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" />

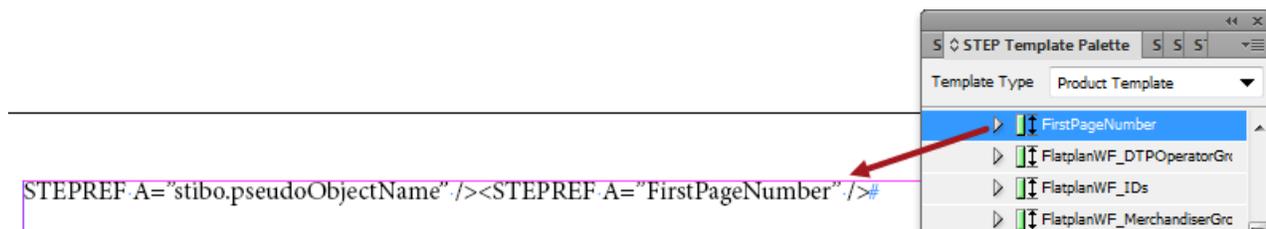
<STEPREPEAT NF="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObjectName" />
<STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" />
<STEPREPEAT NF="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObjectName" />
<STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" /></STEPREPEAT></STEPREPEAT></
STEPREPEAT>
```

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

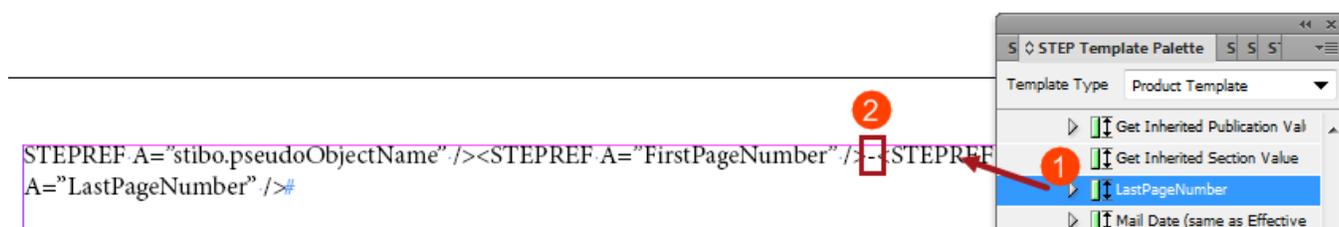
1. With your product template open, open the STEP Template Palette by navigating to Window > **STEP Template Palette** from the application bar across the top of the InDesign interface. Make sure that **Product Template** displays in the **Template Type** dropdown menu at the top of the palette.
2. Using 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 Palette. Object Name will be 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.

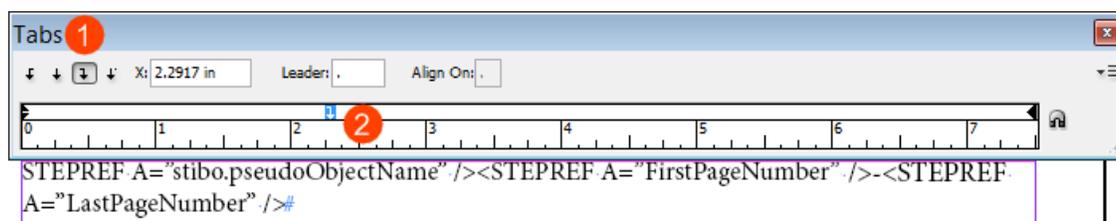


5. Drag the attribute that you are using for the **last** page number into the text frame, directly after the first page number tag, then place a hyphen between the two tags.

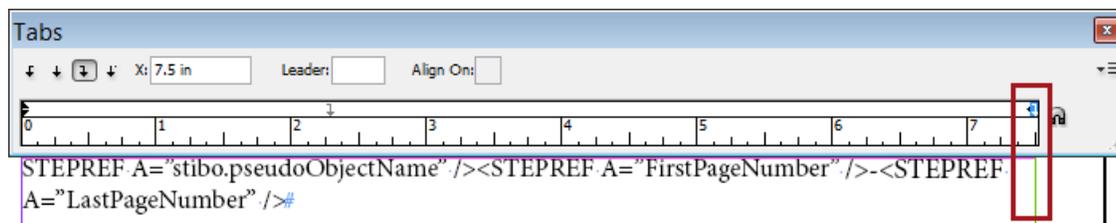


6. To set up the dots (dot leader) between the tags for the section name and the first page number, follow these steps. (**Note:** This dot leader should be added to your paragraph style so you can reuse it later if needed.)

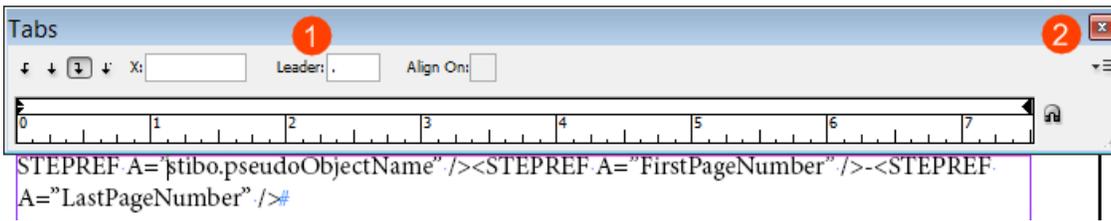
- With your text frame selected, navigate to Type > **Tabs** in the InDesign application bar. The **Tabs** dialog will display at the top of your text frame.
- Click the **right tab** icon, then click anywhere on the ruler to apply the right tab.



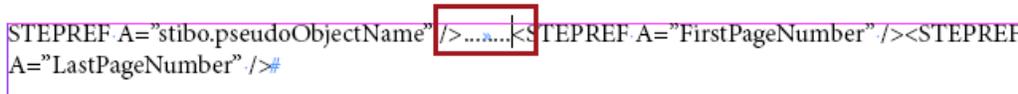
- Click the tab symbol that you just placed in the ruler, then hold down the left button on your mouse and drag the tab symbol to the far right of the ruler until it aligns with the right edge of the text frame. (The edge of the frame will turn green if you have Smart Guides turned on in InDesign.)



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

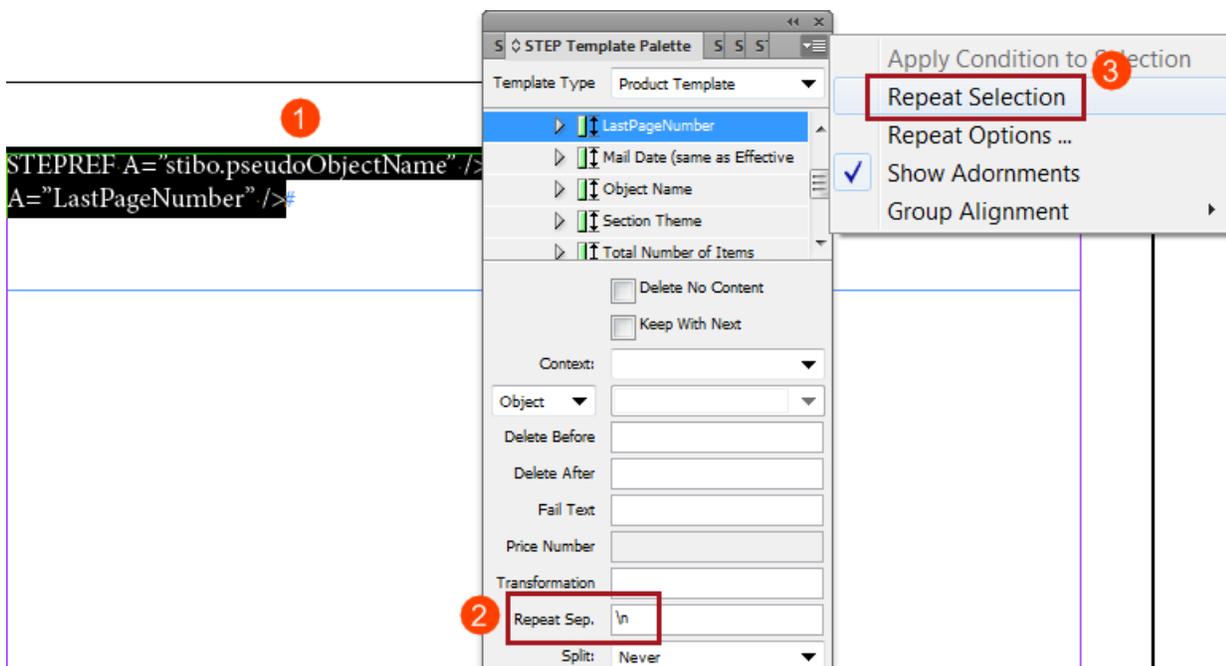


- Using the **text** tool, place your cursor between the tags for the section name and the first page number, then press the Tab key. The dots will appear between the two tags.

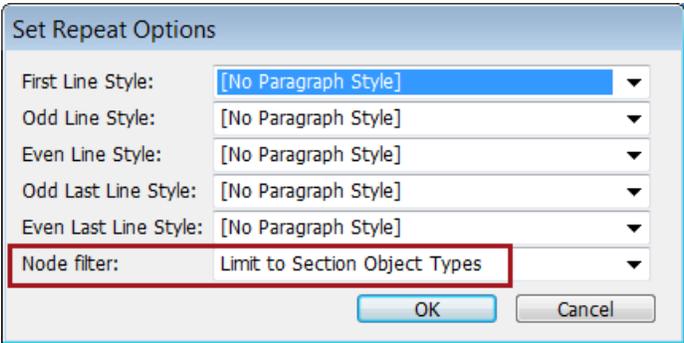


- Next, using the text tool, highlight all content in the frame. On the **STEP Template Palette**, type **\n** into the **Repeat Sep.** (repeat separator) field. (The repeat separator is the string or character that will be placed between each repeated entry. **\n** is the symbol for hard return.)

Then, click the **Options** menu in the upper right corner of the STEP Template Palette and click **Repeat Selection**.



- With the text still highlighted, click on the **Options** menu again and select **Repeat Options**. In the **Set Repeat Options** dialog that displays, choose **Limit to Section Object Types** from the **Node filter** dropdown list, then click **OK**.



10. Your tagging should now look like this.

```
<STEPREPEAT NF="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObject-
jectName" /> .....<STEPREF A="FirstPageNumber" /><STEPREF A="LastPageNumber" /></
STEPREPEAT>#
```

11. 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="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObject-
Name" /><STEPREF A="FirstPageNumber" /><STEPREF A="LastPageNumber" /></STEPREPEAT>
<STEPREPEAT NF="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObject-
Name" /><STEPREF A="FirstPageNumber" /><STEPREF A="LastPageNumber" /></STEPREPEAT>
<STEPREPEAT NF="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObject-
Name" /><STEPREF A="FirstPageNumber" /><STEPREF A="LastPageNumber" /></STEPREPEAT>
```

12. 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="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObject-
Name" />.....<STEPREF A="FirstPageNumber" /><STEPREF A="LastPageNumber" />
<STEPREPEAT NF="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObject-
Name" />.....<STEPREF A="FirstPageNumber" /><STEPREF A="LastPageNumber" />
<STEPREPEAT NF="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObject-
Name" />.....<STEPREF A="FirstPageNumber" /><STEPREF A="LastPageNumber" />
</STEPREPEAT></STEPREPEAT></STEPREPEAT>
```

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

```

<STEPREPEAT NF="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudo-
ObjectName" /><STEPREF A="FirstPageNumber" /><STEPREF A="LastPageNumber" />
<STEPREPEAT NF="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObjectName" />
<STEPREF A="FirstPageNumber" /><STEPREF A="LastPageNumber" />
<STEPREPEAT NF="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObjectName" /> .....<STEPREF
A="FirstPageNumber" /><STEPREF A="LastPageNumber" /></STEPREPEAT></STEPREPEAT></STEPREPEAT>#

```

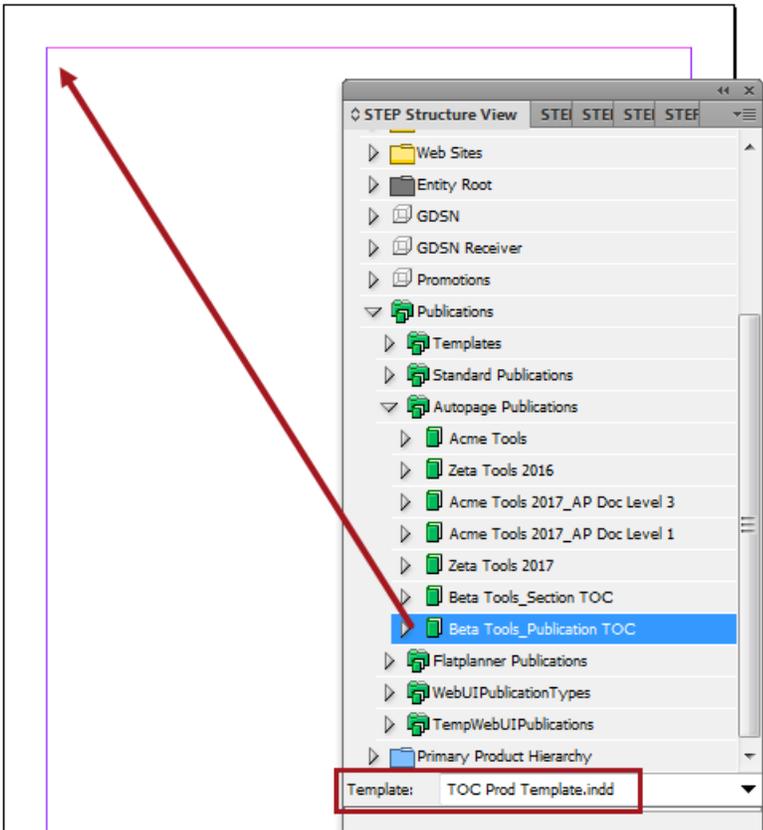
14. Next, test your product template to ensure that it has been set up correctly.

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:

Garden Tools	6-13
Weed Trimmers.....	6-13
Electric	9-12
Gas Powered.....	12-13
Gloves	15-19
Adhesives	17-19
Adhesive Removers	18-19
Power Tools	20-23
Hand Tools.....	22-23
Safety	14-15
Safety Apparel.....	0-0
Hard Hats.....	0-0
Safety Equipment	14-15
Flares	0-0
Toolboxes	2-5
Nails and Screws	3-5

Publication Templates

This section describes how to create a publication template (which is a standard InDesign document), how to add graphical formatting to the template, and how to store the template locally and/or in STEP.

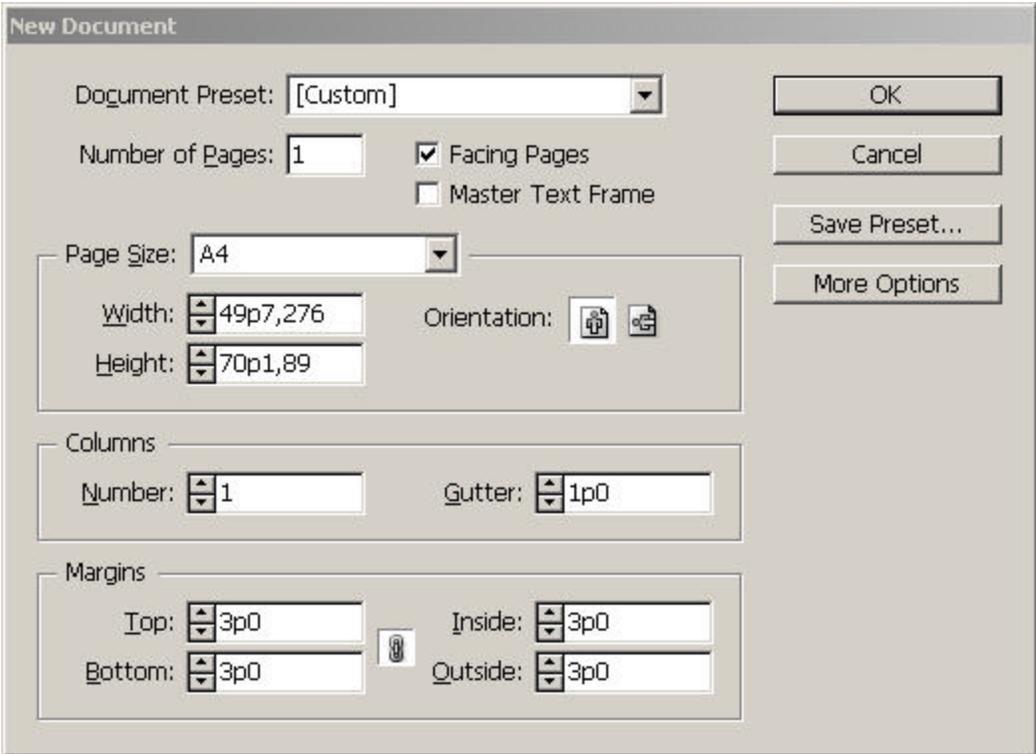
The publication template is the InDesign document that is used when mounting product data. A publication template defines the document size and contains information about styles to be used from the product template. The publication template must contain all styles (paragraph styles, object styles, character styles, swatches - ID colors - and line styles) that are used / defined in the different product templates you have created. Furthermore, it must contain the same layers as used in the product template (if working without STEP Flatplanner or STEP AutoPage). A publication template is used to create the PDF files of your pages.

Publication templates are required in a certain capacity whether you use 'standard' STEP'n'design ('drag and drop') publishing, STEP Flatplanner, or STEP AutoPage. If you choose not to create a publication template but just to mount product data on an empty InDesign page, this page is considered the publication template.

Note: Before a publication can be created in STEP, a publication template must be saved to the STEP Workbench.

Creating a Publication Template

- 1. Open InDesign, from the **File** menu, point to **New**, and then click **Document**.
A **New Document** dialog box appears.



2. Define the settings for the document: page size, columns and margins.
3. Check that the **Facing Pages** check box is selected to create a spread.

When using STEP Flatplanner it is recommended to create the publication template as a spread.

4. Click **OK**.

A new empty document is created. You now need to define publication template layout and formatting.

Note: A publication template can consist of several spreads, a spread for each section, e.g. containing different thumb tabs for each chapter in a catalog. To use a specific spread in a publication template, you must define a rule in STEP AutoPage or in STEP Flatplanner that points out a spread in a publication template document. For more information about Pagination Rules in STEP AutoPage, see "[About Pagination Rules](#)" in the STEP AutoPage User Guide. For more information about Pagination Rules in STEP Flatplanner in the STEP Flatplanner User Guide.

Creating Layers

Note: If working with STEP Flatplanner and using a Multi-Version license, you do not create layers in the publication template as described below, as you only need to mount one version and then the other versions in the same publication will be mounted automatically (provided that layer mapping has been performed correctly for each version). If you have a single version publication, then you do not need to create layer mapping. The layers from the product template will be copied across to the output page when mounting.

When creating a publication template it is possible to work with more layers, e.g you can create a text / language layer and an image layer if you want to separate your images. This is useful in case you want to create catalogs in different languages but use the same images for all of them.

To create a new layer, do the following:

1. Ensure that the relevant publication template is opened.
2. Click the **Layers** tab, expand the Options menu, and then click **New Layer**.

A **New Layer** dialog box appears.



3. In the **Name** field, type a name for the new layer, e.g. "Images", and then click **OK**.

Publication Template Layout and Formatting

You can apply layout and formatting to the publication template either by:

- Defining all the styles being used in your product templates in the publication template. Generally, you use standard InDesign formatting features, such as font face, size, color, style, frame border to format the document.

Note: It is recommended to organize graphical formatting using InDesign paragraph styles, object styles, swatches, and line styles as these styles can be updated globally, thereby providing you with a more flexible solution.

- or by loading all styles (paragraph styles, object styles, character styles, swatches - ID colors - line styles and table styles) from each product template you have created.

Note: The publication template must contain all styles used on the relevant templates. Ensure that the naming of the styles defined in the publication template is identical to the style naming in the templates.

Formatting Document Using Styles

In your product template, you can have several text or image frames. To make these frames and their contents appear in a certain way on your output page, you can add graphical formatting to your publication template using:

- Paragraph styles (to format contents of a text frame): mandatory if mounting STEP tables
- Object styles (to format image or text frames): user preference, not needed at all to work with STEP
- Swatches and line styles (to format tables): mandatory if mounting STEP tables

Standard InDesign features are used when creating paragraph styles and object styles. Make sure that the naming of the styles in the publication template is identical to the style naming on the product template. If styles used in the product template are not defined on the publication template, then the styles from the product template are copied to the publication template.

For more information on how to create and configure paragraph styles, swatches, and line styles in publication templates, see **Configuring Table Styles in Publication Templates** in the **STEP'n'design** documentation.

Storing Your Publication Template

Once you have created a publication template, you can:

- Store the publication template on your own hard drive and use it for mounting products from your own computer.
- Upload the publication template to STEP, which means that other users can use the template.

Storing Publication Templates Locally

To store a publication template on your local computer:

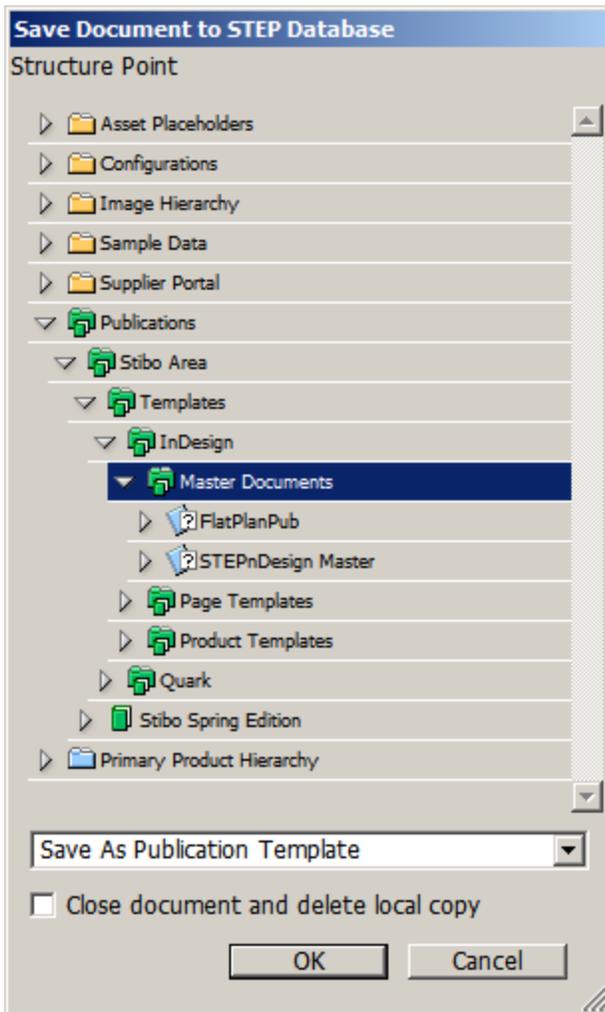
- Save it as a normal InDesign file into a directory or folder on your own hard drive.

Storing Publication Templates in STEP

To store the publication 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 a publication group you want to save the document to, and then click **Save as Publication Template** from the list. This way you keep publications and relevant templates together.

Clicking **Save as Publication Template** will make the publication template selectable for other STEP users.

Note: If you want to create a new publication group for your templates, you must do so in STEP.

4. Click **OK**. The publication template is saved in STEP.

Configuring Table Styles in Publication Templates

In order to format STEP Tables on InDesign pages, a parallel set of formatting configurations must be created in STEP and InDesign for the following:

- Colors (used both for rule lines and background shading)
- Rule lines
- Text styles

In STEP, these configurations are the **Colors**, **Rules**, and **Style Tags** created on the System Setup tab. The corresponding configurations in InDesign are **swatches**, **line styles**, and **paragraph styles**. The InDesign configurations are created in the InDesign **publication template** that will be used to mount (generate) tables in InDesign.

This topic deals only with the table formatting definitions created in publication templates. Full details on how to configure the corresponding definitions in STEP are outlined in the **Creating Table Formatting in System Setup** section of the **STEP Tables** documentation.

Example of Styled Table in STEP

The following screenshot shows a styled table in STEP as it appears in the STEP Table Preview. The background colors, rule lines, and text styles have been applied using the settings created in System Setup. In order for the table to appear with the same colors, text styles, and rule lines in InDesign, the corresponding settings must be created in the publication template.

Note: If no styles are defined for the table in STEP, the table will be mounted in InDesign with basic InDesign paragraph styling, and the table must then be styled manually using the standard InDesign table editor. Manual styling of tables on InDesign pages is strongly discouraged, as formatting not connected to STEP is easily lost when tables are updated.

Definition **Preview**

Select version Acme Party Supplies/English US Select Preview Node

Product Name	Part No.	Image	Product Name	Price
Christmas Party Hat	121184-A		Christmas Party Hat	\$7.99
Cosmic Party Hat	121177-A		Cosmic Party Hat	\$3.99
Pink & Green Party Hat	121171-A		Pink & Green Party Hat	\$2.99
Pink & Green Pom-Pom Hat	121193-A		Pink & Green Pom-Pom Hat	\$2.99
Political Party Hat	121192-A		Political Party Hat	\$17.76

Transformation Parameters

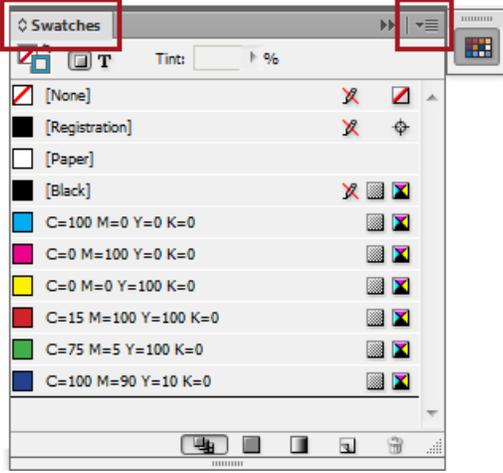
Alternate Row Colors Color 1 rows "White" then 1 "Light Blue". Restart count after...

Add Transformation

Configuring Table Colors in InDesign

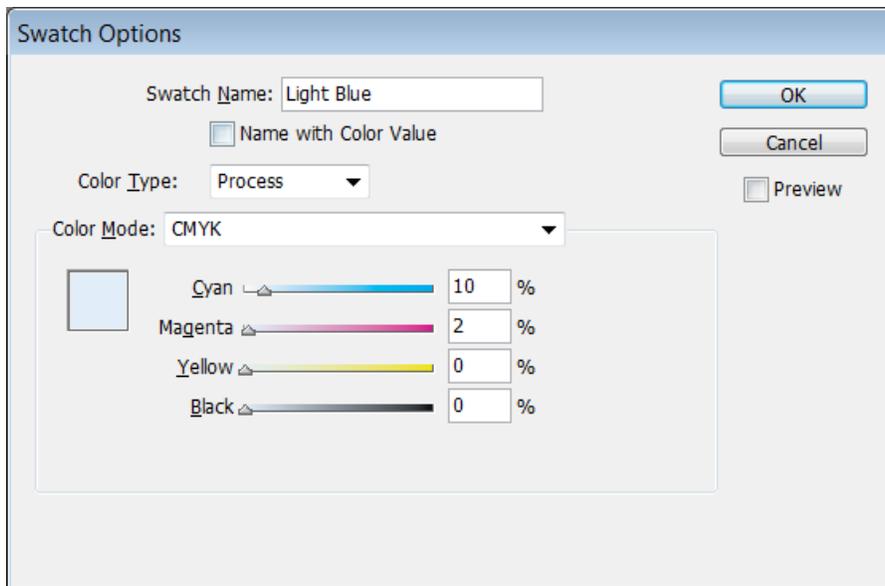
Colors defined in STEP are configured in InDesign as **Swatches**, as follows:

1. In InDesign, navigate to Window > Color > **Swatches** (or press F5). The **Swatches** panel displays.



2. Click the **Options** menu in the upper right corner of the **Swatches** panel, then click **New Color Swatch**.
3. On the **New Color Swatch** dialog, deselect the **Name with Color Value** check box, then type a name in the **Swatch Name** field.

Note: The name of the swatch must be identical to the corresponding color created in STEP. Names of colors and swatches are case sensitive.



4. Adjust the color values as needed, then click **OK**.

Loading Swatches From Another InDesign Document

To load swatches from another InDesign document:

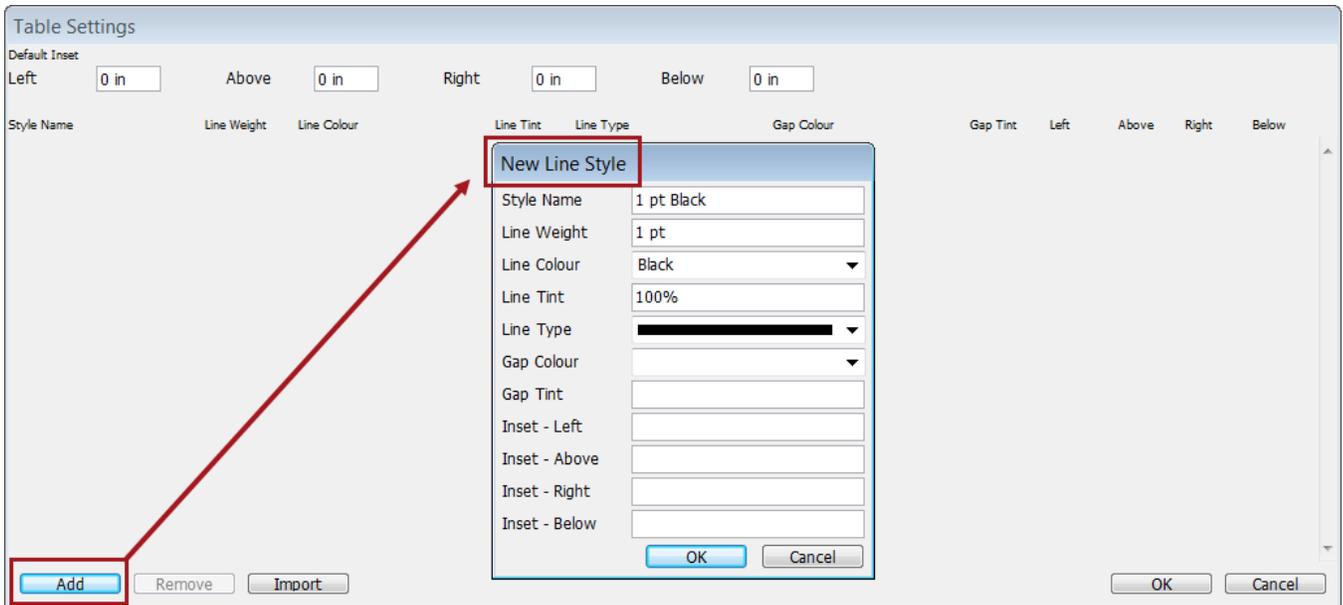
1. In the **Swatches** panel, click the **Options** menu, and then click **Load Swatches**. An **Open a File** dialog box displays.
2. Navigate to the InDesign file that contains the swatches that you would like to import, then click **Open**. (This file does not have to be another publication template; it can be any InDesign document.)
3. The Swatches from the selected InDesign file will automatically import.

Configuring Table Line Styles in InDesign

Rules defined in STEP are configured as table **Line Styles** in InDesign via the STEP > **Table Settings** menu. Line styles govern the lines ('borders' or 'rulers') that appear between cells and/or surround the table.

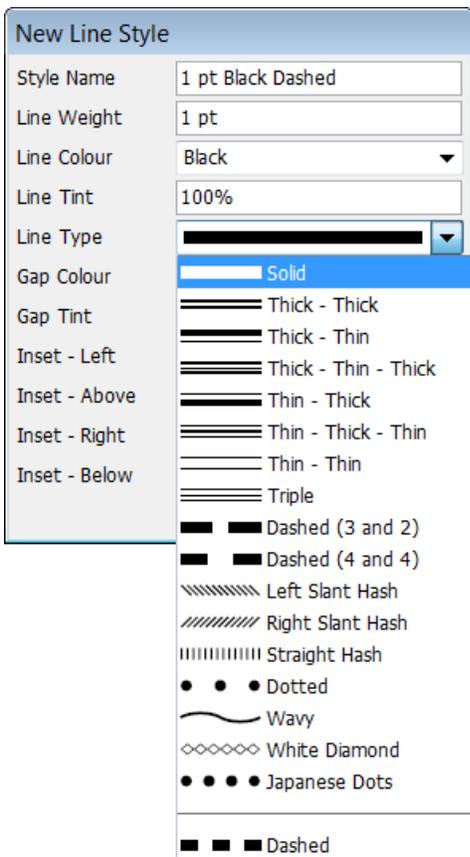
To create line styles in the InDesign publication template:

1. Navigate to STEP > **Table Settings**. The **Table Settings** dialog box displays.
2. Click **Add** in the lower left-hand corner. The **New Line Style** dialog box displays.



3. Populate the fields in the **New Line Style** dialog as follows:

- **Style Name:** Name of the line style. Must exactly match the name of the corresponding rule created in STEP. Is case sensitive.
- **Line Weight:** Width in points. The measurement unit will always default to points regardless of what measurement unit is being used for the rest of the page (for example, mm, inches, or picas).
- **Line Colour:** Color of the line style. An InDesign **swatch** for the color must first be created in the publication template before the color will appear in this dropdown list.
- **Line Tint:** Opacity level of the line style. Default is 100%. Value must be typed.
- **Line Type:** Specify whether the line style should be solid (most common) or a different style such as dashed or dotted. The same line styles available in the InDesign **Stroke** panel are available in the Line Type dropdown.



- **Gap Colour:** Only applicable for non-solid rule lines. Defines the color that goes in between the dashes, dots, hashes, etc. The same colors (swatches) that appear in the dropdown list for Line Colour appear in the Gap Colour dropdown. Leave blank for solid rule lines.
- **Gap Tint:** Opacity level of the gap color. Default is 100%.
- **Insets (Left, Above, Right, Below):** How much inset space ('padding') should be placed between the edge of a cell that is bordered by the rule line and the text or image content within the cell. If left blank—or if a value of 0 is inserted—the insets will default to InDesign's default table cell inset, which is 4 points (or, 0.0556 inches or 1.411 mm).

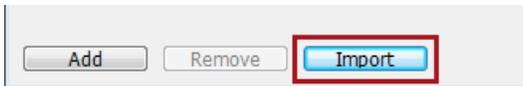
Note: If you would like no inset padding at all, enter a hairline space value of .0001. The system will recognize this value as being so close to 0 that there will be no visible inset padding.

4. Click **OK** when finished. Any values entered during the initial creation of the line style may be edited later if needed.

Loading Table Line Styles From Another InDesign Document

To load table line styles from another InDesign document:

1. Navigate to **STEP > Table Settings**, then click the **Import** button in the lower left corner of the **Table Settings** dialog box.



2. An **Open a File** dialog box displays. Locate the InDesign publication template containing the line styles that you would like to import, then click **Open**.
3. The line styles from the selected InDesign file will automatically import.
4. Click **OK** to complete.

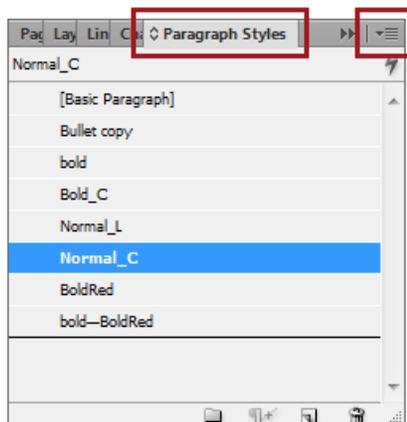
Configuring Paragraph Styles for Tables in InDesign

Style tags created in STEP and applied to tables are configured as **paragraph styles** in InDesign.

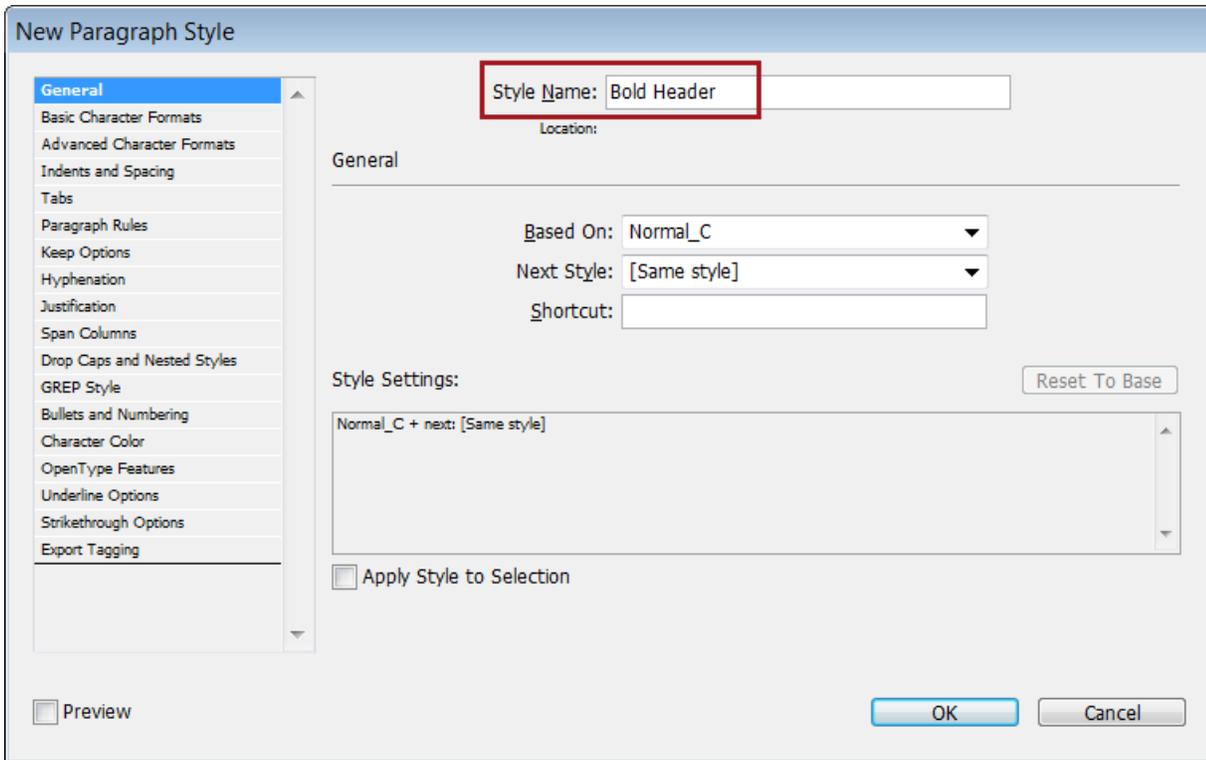
For example: If the tables you are mounting from STEP contain the styles 'HeaderRowStyle' and 'BodyRowStyle', then there must be corresponding paragraph styles also named 'HeaderRowStyle' and 'BodyRowStyle'. STEP style tags and InDesign paragraph styles are both case sensitive and must match exactly.

To create 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** that exactly matches the corresponding style tag in STEP.

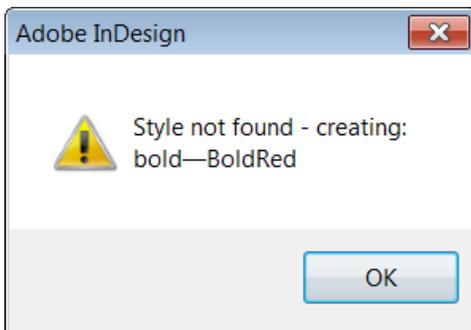


4. Continue configuring the paragraph style as needed, then click **OK** to complete.

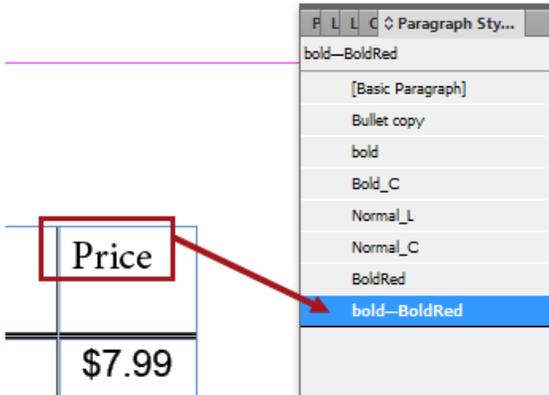
Merge of Row / Column Style Names

In the case where a row with a style applied crosses a column with a style applied, a third paragraph style is created when the table is mounted in InDesign. The name of this third paragraph style (sometimes called an 'intersection style') is a combination of the name of the paragraph style used for the row and the paragraph style used for the column, connected by an em dash.

For example, a table may contain a row style called 'bold' and a column style called 'RedBold'. In the cells where these rows and columns cross over each other, the two styles will overlap. When the table is mounted in InDesign, the system will automatically create a new paragraph style called 'bold—BoldRed'.



However, with the system not knowing which of the two paragraph styles to 'pick up,' the newly created 'intersection' style will appear as a generic (basic) paragraph style.



Note: In order to avoid the creation of 'intersection' styles in InDesign, it is recommended to apply text styling at the **cell** level in STEP Tables where an overlap will occur between row and column styles. 'Intersection' styles are essentially duplicates of existing styles and can cause clutter in a long list of paragraph styles.

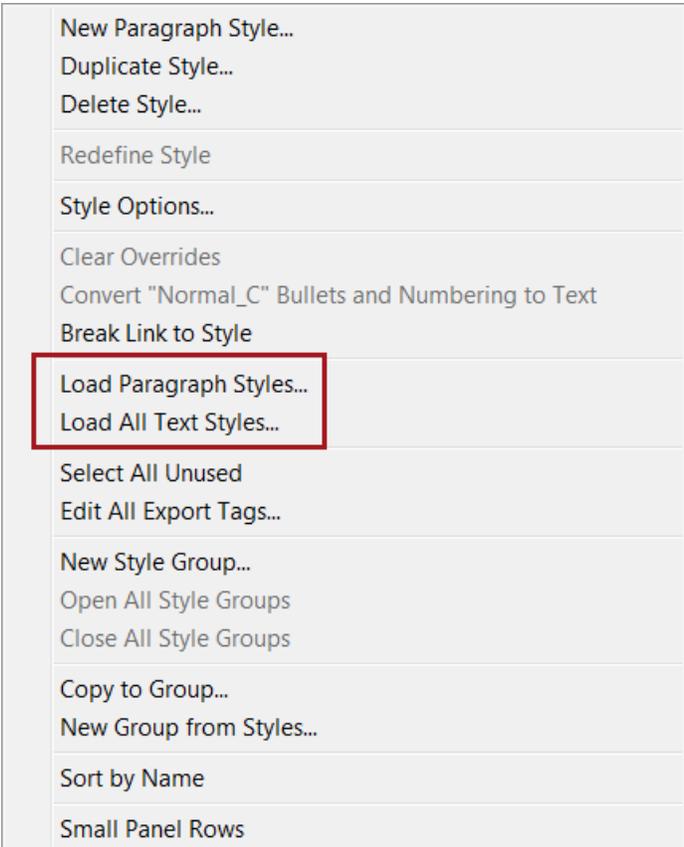
For more information on applying formatting to STEP Table **cells**, see **Specifying Local Cell Formatting** in the **STEP Tables** documentation.

Loading Paragraph Styles From Another Template

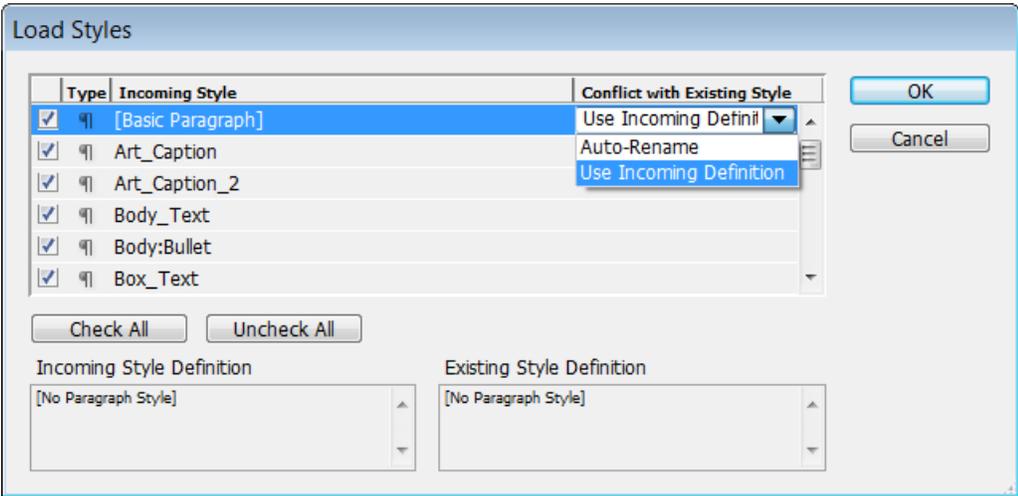
If paragraph styles have already been defined in another InDesign document, these styles may be imported from the other document in order to save time when setting up your publication template. The other InDesign document does not need to be a publication template that was created using STEP'n'design;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

To load paragraph 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**.) An **Open a File** dialog box displays.



3. Navigate to the InDesign document that contains the styles that you would like to import, then click **Open**. A **Load Styles** dialog box appears.



4. Select the styles that you want to load. As 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.
6. Choose **Auto-Rename** if you do not want to overwrite the existing style. Click **Use Incoming Definition** if you want to overwrite the existing style and use the imported style.
7. Click **OK**.
8. Repeat these steps to load styles from other documents to the publication template.

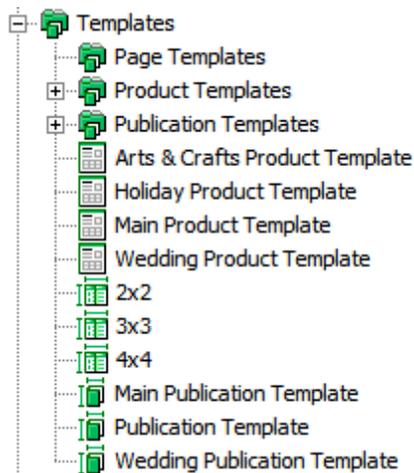
Sorting Templates in STEP

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

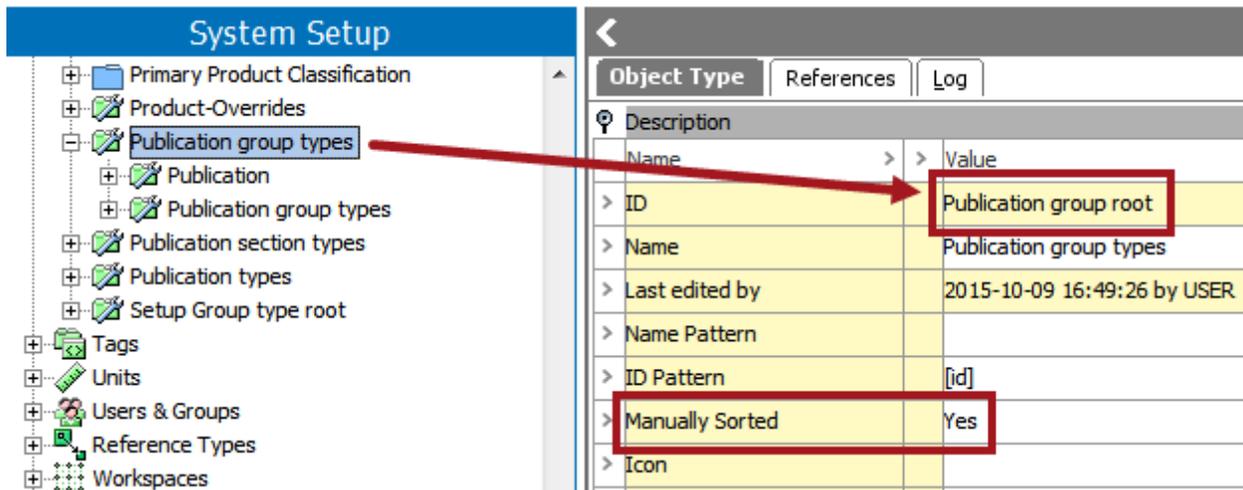
If **Manually Sorted** is set to **No** on the publication group object type, all template types shown in the STEP Workbench Tree are grouped by type, with alphabetical sorting applied within each group. The default sort order is as follows:

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

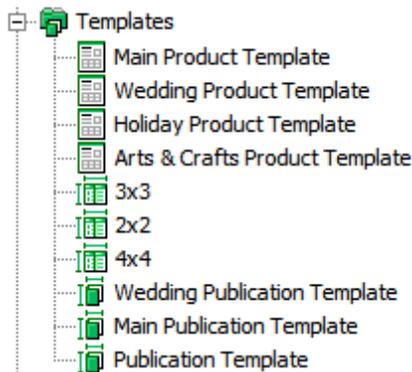


Manual Sorting

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.

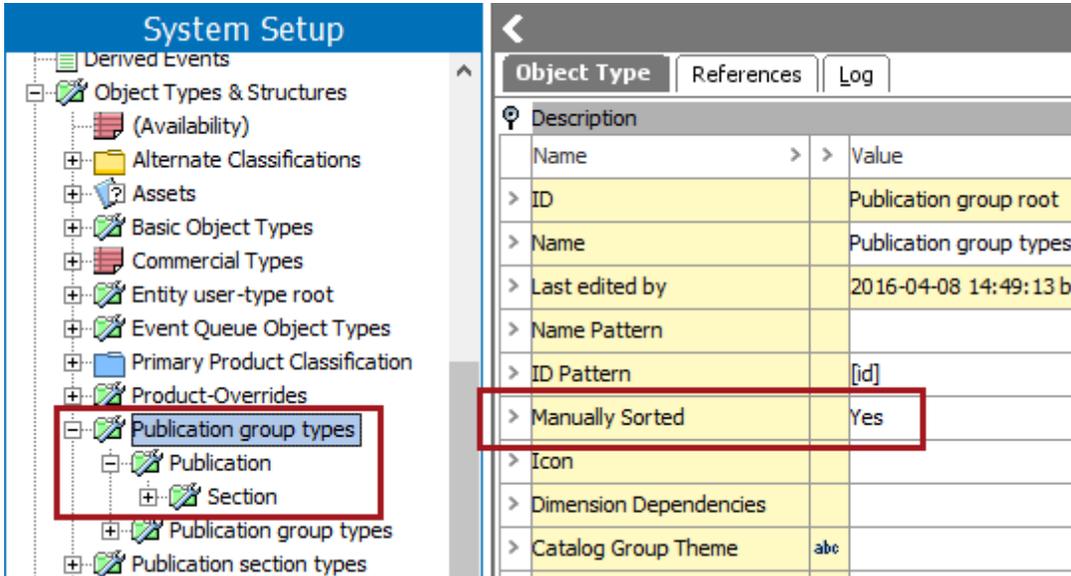


For more information about object type sorting in STEP, see the 'Manually Sorted' section of the System Setup / STEP Super User Guide documentation.

Organizing Publication Sections in STEP

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:

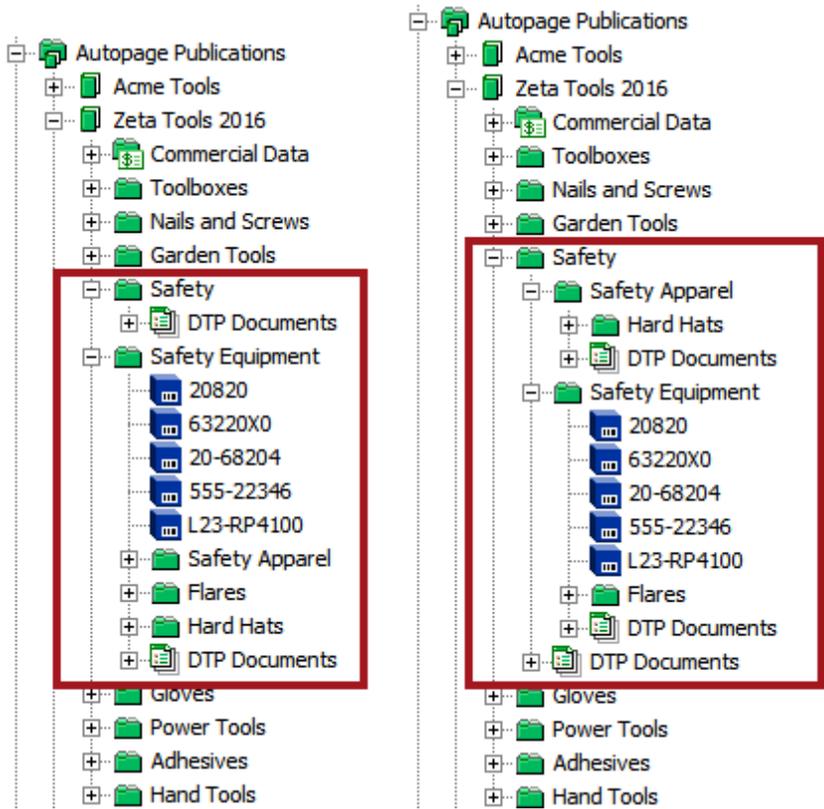
- Publication Group (typically, the object type with the STEP ID 'Publication group root')
- Publication (typically, the object type with the STEP ID 'Default publication type')
- Section (typically, the object type with the STEP ID 'Section')



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 show 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'n'Design documentation for more information.

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

Working With Version Layers

This section describes how to work with version layers when creating publications in STEP'n'design. The STEP database, as well as STEP'n'design, is capable of supporting multi-dimensional product data. This means that the database can store multiple views of the same product data. Typically, these views (or 'versions' as they are called), are modeled around specific language and country views on data. Versions could also be created to support currency zones, vertical markets, or types of catalogs. Therefore, product data in STEP must be organized into different versions in a publication.

This part of the STEP'n'design User Guide will explain how you can work with these different versions in your STEP'n'design mounting and pagination process.

Note: Version layers do not apply to Page Templates.

Using Version Layers

There are two ways of working with version layers:

- Adopting layout from another version
- Using STEP Flatplanner

Adopting Layout from another Version

Note: Adopting layout from another version is not relevant if using STEP Flatplanner.

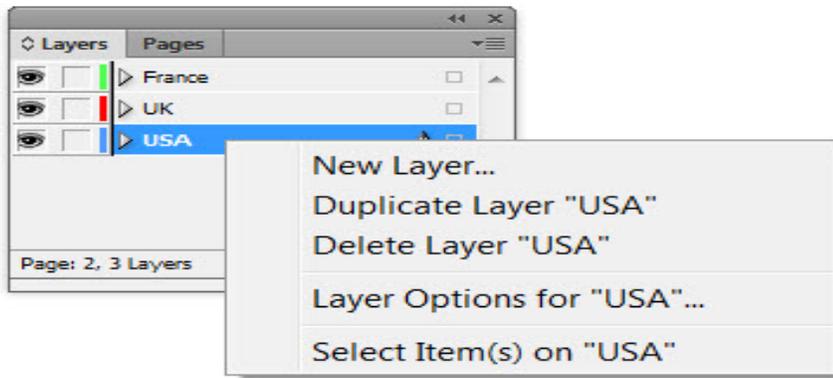
When creating new version layers it is possible to adopt the layout from another Version.

The normal workflow for working with version layers in STEP'n'design (without using STEP Flatplanner) 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 or modify the layout and appearance of the pages and the product on the page. 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 adopt or reuse the layout you have created on a version layer pages after mounting the product data.

It is possible to duplicate a version layer from the **Layers** tab (Window menu/F7) and then change version afterward. This way, you keep all your formatting and layouting from one version to another within a publication and you can mount several versions (pointing at different context) of a publication.

1. Click the relevant version layer in the **Layers** tab (F7), expand the Options menu, and then click **Duplicate Layer** “**”.

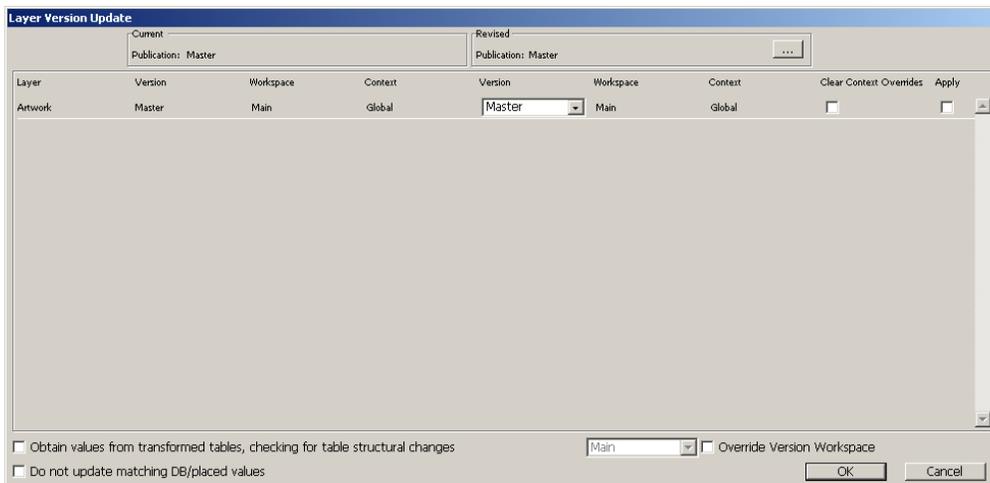
A **Duplicate layer** dialog box appears.



2. In the **Name** field, type a name for the new layer, and then click **OK**.

Note: It is recommended to change the layer name to something that relates to the context that the version defines, e.g. "German version".

3. To have the new version layer to pick up a new context, click **Layer Version Update** from the **STEP** menu. A **Layer Version Update** dialog box appears.

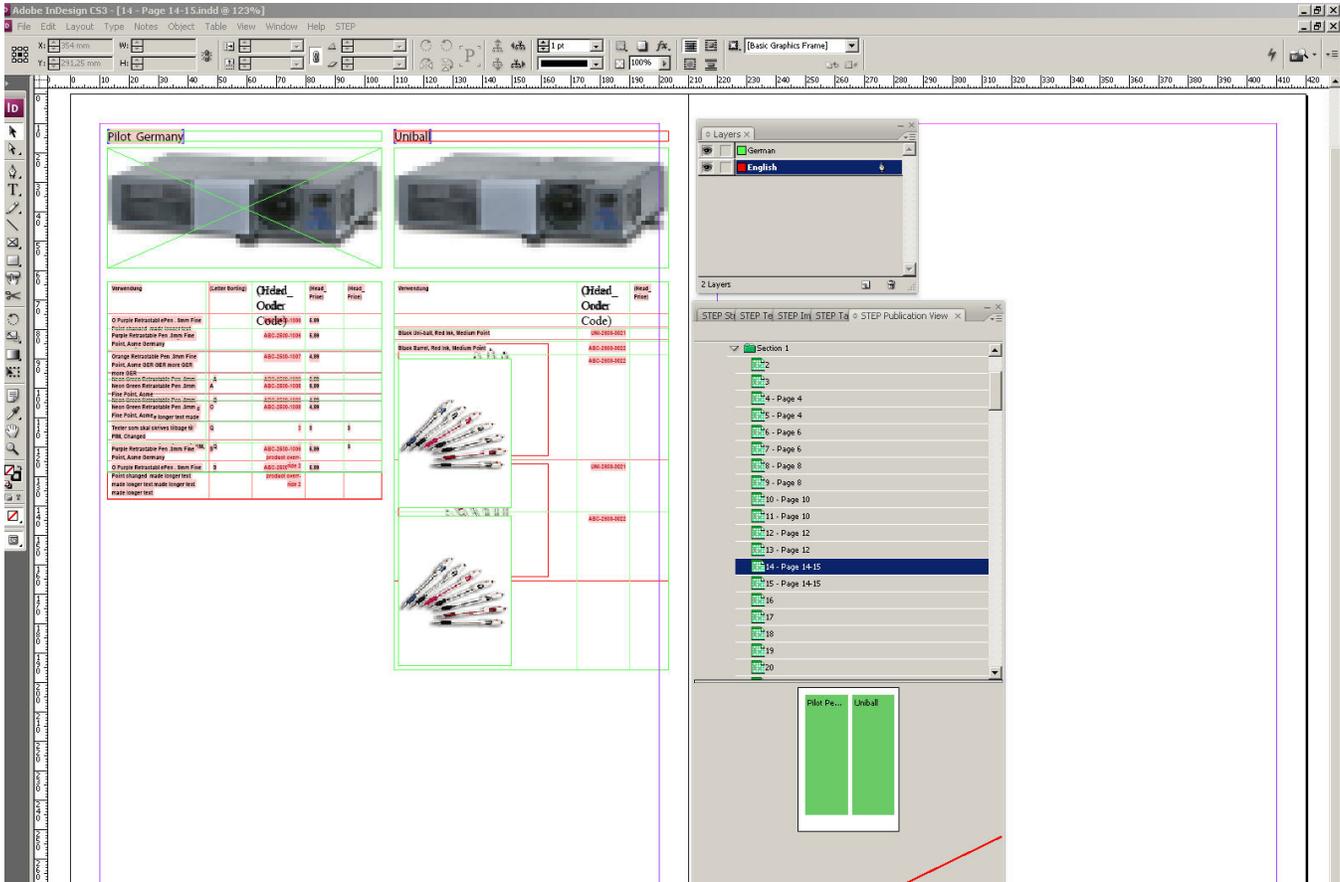


4. Change the version for the layers as required, select the **Apply** check box, and then click **OK**.

The content on the new version layer now changes from the content in the duplicated version layer to the correct content as defined by the context of the new version - but the layout of the versions are identical.

Working with Version Layers together with STEP Flatplanner

A huge advantage of using the STEP Flatplanner is the possibility of mounting all your versions in one operation - provided that you have defined the relevant layer mappings for your publication. When mounting one Version, all the other versions are mounted automatically in new layers.



For information about viewing the different version layers, see ["Viewing Version Layers"](#) below.

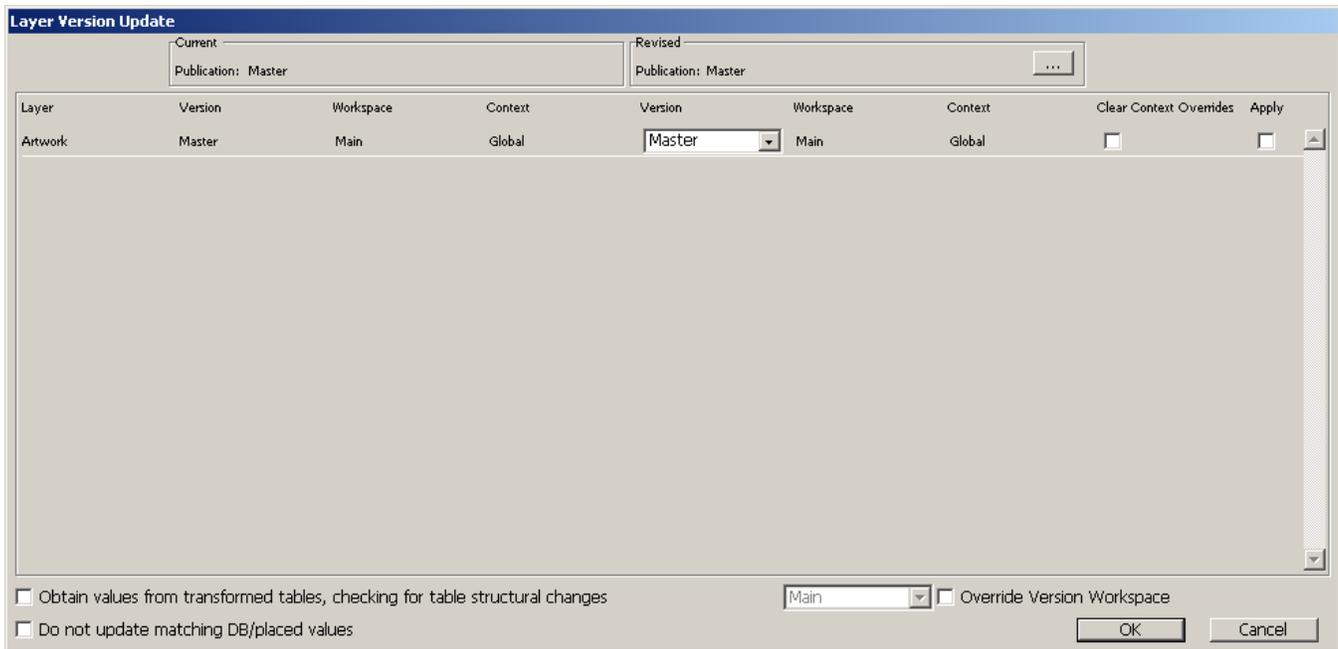
For more information about layer mapping, see the STEP Flatplanner User Guide.

Viewing Version Layers

From your DTP application, you can inspect the different versions you are mounting from, by clicking the **Layers** tab (Window menu/Layers or F7). Each version has it's own layer (see example in illustration below).



Likewise, you can see how STEP'n'design knows which STEP PIM context is mounted on a layer, by clicking **Layer Version Update** in the **STEP** menu.



Changing Versions

To change the viewing versions in your DTP application do the following:

1. In the **STEP** menu, click **Change Version**.
A **Change Version** dialog box appears.

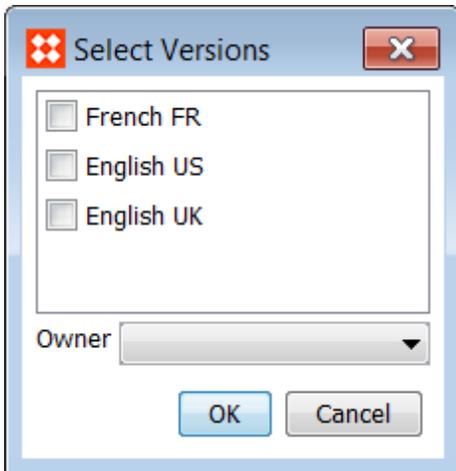


2. Unfold the relevant publication, click the version you want to change to, and then click **OK**.

Mapping Versions to Layers

When you create a new version you must define which layer it will use.

1. In [Tree], unfold the **Publication** hierarchy.
2. Click the relevant **publication** and then click the **Publication** tab.
3. Under **Layer Mappings**, click the **Versions** column for the layer you want to map a version to, and then click on the
A **Select version** dialog box appears.



4. Select the relevant version(s).
5. If you have selected more than one version, you must select which version should be the owner.

Note: The Owner Version is the version that will be used when mounting in the DTP application.

6. Click **OK**.
7. In the **Template** column, enter the case-sensitive name of the layer in the product template that you want to map to version(s).
8. In the **Document** column, enter that name you want for the layer in the DTP document created when mounting in the DTP application.
9. To create more layer mappings, repeat step 1-8.

Mounting Products

This section contains a description of how to mount products in InDesign using product templates.

Using a product template, you can mount one or several products directly to the page in one operation. If the product template uses more layers (e.g. a text / language layer and an image layer), then the elements will automatically be mounted on the defined layers in the product template.

Note: It is possible—but not recommended—to mount product data without using a product template. You then mount STEP data one attribute at a time.

Mounting Products Using Product Templates

This section describes how to mount specified product data of one or several products directly to the page in one operation by using a product template. It also contains information about mounting 'single' attributes—though using a product template—in case you need to add data that is not part of the product template.

Before you start mounting data using a product template, you should check the following:

- The page you mount data onto must have settings for object, paragraph, line and color styles that your template uses.
- A valid product template must exist and must be active when you mount data.

A valid product template can be stored either at a location on your local hard drive, or it can be uploaded to STEP and thus stored centrally.

Note: You define whether to use a local or a STEP-stored product template under Preferences in the STEP menu. For more information, see "[Installing STEP'n'design](#)" on page 12..

- Relevant **versions** must exist pointing out the context and workspace from which the product data must be mounted. For more information about creating versions, see the STEP User Guide.
- If working with multiple layers in the product template, ensure that layer mapping has been performed. For more information, see STEP PIM User Guide.

To mount products, you must do the following:

1. Open InDesign, log on to the relevant STEP environment, and then define which template to use in **Preferences** dialog box (**Preferences** command in the **STEP** menu).

Preferences

Multi-place Gap: 0.0417 in Multi-drop commit: 0

Structure Tree view options

Show all Attributes in Tree

Show Tables in Tree

Show Asset References in Tree

Show ID after name

Place in Galley

Place in Free Space

Fit Calculated Table Width to Frame Width

Process Folder: C:\Users\abcd\step-dtp\indesign\

Template Path: C:\Users\abcd\Documents\Templates

Template Cache size: 0

Server presentation: None

Use default asset path

Asset Location:

Note Layer: Notes

Note Colour:

Don't mount Done Notes

Prompt for Version

Auto Show Version Update Auto save before save to DB

SOAP Timeout: 900 cURL Timeout: 900

Export... OK Cancel

To use locally stored templates do the following:

- In the **Preferences** dialog box, you must select the Template Path where your local templates are stored. Ensure that **None** is selected from the **Server Presentation** list.

To use STEP-stored object templates do the following:

- In the **Preferences** dialog box, select the **Product Default** from the **Server Presentation** list. When mounting products, then the product template applied the Product in STEP PIM will be used.

Note: Before you can use a default template, the product you want to mount on a page needs to have the **Default InDesign Template** designated in the workbench. For more information about setting the default template, see Online Help.

To use a combination of centrally STEP-stored product templates and locally stored templates, do the following:

- In the **Preferences** dialog box, select the **Product Default** from the **Server Presentation** list. If you have not selected a default InDesign Product template for the product you are mounting, then the system will attempt to use a local product template instead.

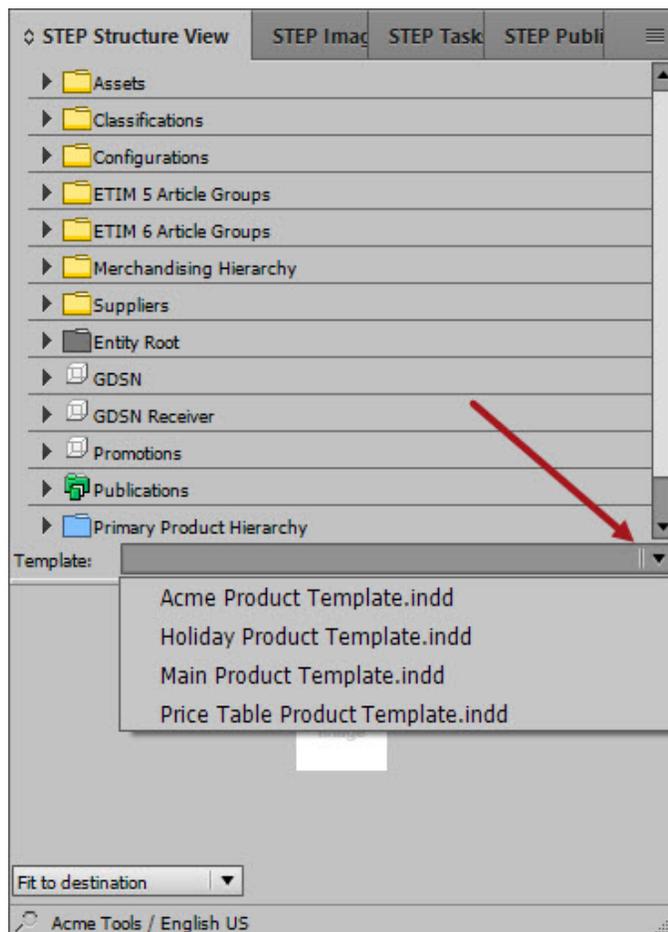
For information about uploading a product template to STEP and use it as default template, see ["Storing your Product Template"](#) on page 68.

To use Publication rules validated object templates do the following:

In the **Preferences** dialog box, select the **Publication rules** from the **Server Presentation** list. When mounting products, then the product template found from the validated publication rules in STEP will be used.

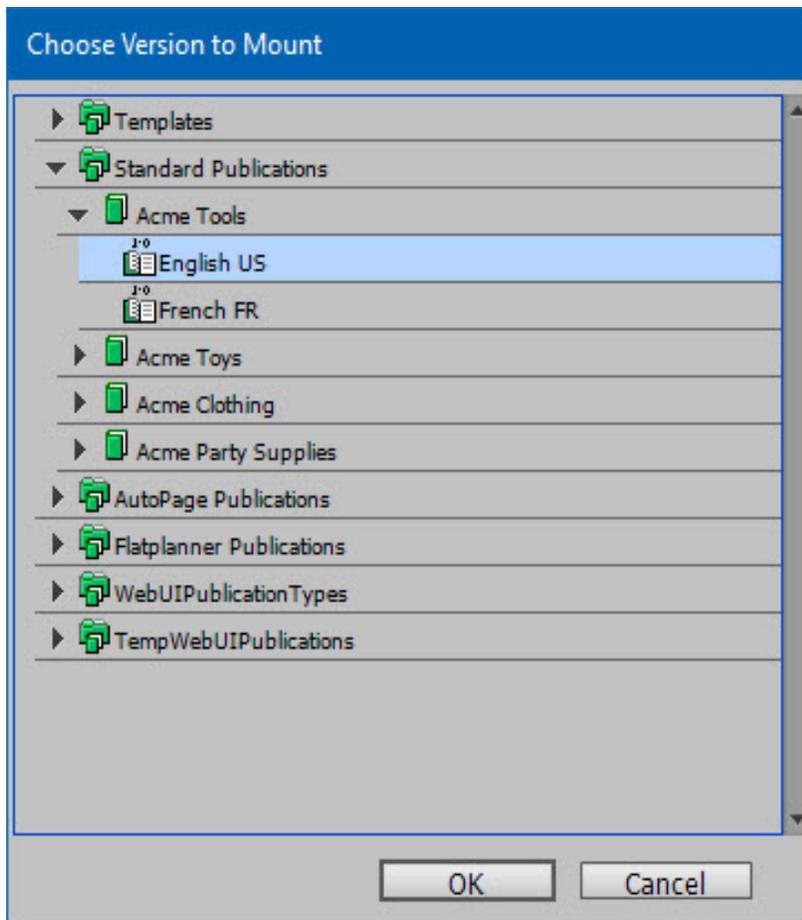
2. In the **STEP Structure View** (if using locally stored product templates), click the relevant template from the **Template** list.

Note: The selectable product templates in the list are the templates stored in the **Template Path** folder (**Preferences** command under **STEP** menu).



3. Find your product in the **STEP Structure View** either by navigating through the classification hierarchy or by searching for the product using the **Product Search** field.
4. Drag the product.

If you have selected the **Prompt for Version** check box in the **Preferences** dialog box, then a **Choose Version to mount** dialog box appears, when you try to drop the product into the desired location on the page.



Click the relevant version, and then click **OK**.

- Drop the product into the desired location on the page.

Note: When working with product templates you must mount (drag) the product—or product family—not the attribute, as the product template only takes effect on products and product families.

Note: You can mount several products in one operation. Simply hold down **Ctrl** or **Shift** and select multiple products in the **STEP Structure View** before dragging into page. Products will be mounted sequentially in the column you drag them into. If product data exceeds available column space, STEP'n'design will flow data into next column or page. Be aware that your multi-selection must be within the same classification or product family.

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

Attribute Mounting

In some situations you may need to mount attributes—and not just products—to the InDesign page.

Note: To mount single attributes you must have selected the **Show Attributes in Tree** check box under **Preferences**. For more information, see "[Installing STEP'n'design](#)" on page 12..

1. If not already, log on to STEP.
2. Optionally, draw a text frame using the Type tool (T).
The width and height of the frame should be the correct width / height for your future output.
3. In the **STEP Structure View**, find your product either by navigating through the classification hierarchy or by searching for the product using the **Product Search** field.

You can mount data from either the blue product structure or the yellow classification structure - or a combination of both.

The **Product Search** field allows you to search for a string of text within the name of the product or product family.

Note: The Product Search will not search classification names or values of product attributes.

The Product Search supports the wild card operators ? and *. Product Search is not case-sensitive.

This means that a search for:

“canon * printer ?12”

will return hits on:

Canon Laser Printer 112

Canon Inkjet Printer 212

but not on:

Canon Laser Printer 1112

or:

Brother Laser Printer 112

4. Once you have found your product, click on the arrow to the left of the product to expand it and view the attributes within the product.
5. Click the attribute and drag (i.e. hold down mouse button) and drop it e.g. into the text frame you created.

Galley Text Mounting

When mounting galley text and galley key letters onto an empty document it is necessary to perform the following.

1. Ensure that you have setup preferences to use the **Place in Galley** option instead of the **Place in Free Space** option. For more information about setting preferences, see "[Installing STEP'n'design](#)" on page 12.
2. To mount galley text with galley key letters you must now:
 - Create the needed text frames with numbers.
 - Create the needed image frames and then mount the relevant images.
 - Add numbers manually in the mounted text (galley).

Note: When adding numbers in the mounted text it is recommended to put the numbers outside the brackets, otherwise they will disappear during update.

Finalizing Pages and Saving Documents

If using STEP Flatplanner, please refer to "[Mounting Planned Pages](#)" for a description of how to finalize pages.

1. After you have mounted all the products, make relevant adjustments to the page using normal InDesign functionality.

It is possible to drag and drop additional elements from STEP (e.g. from **STEP Images** and/or **STEP Structure View**).

2. Optionally, if you want to continue with mounting products in another version:

- Click the **Layers** tab (F7), expand the Options menu, and then click **Duplicate Layer** “**”.
- In the **Duplicate layer** dialog box, type a name for the new layer, and then click **OK**.
- To have the layer to pick up a new language and context, click **Layer Version Update** from the **STEP** menu, and then make the necessary changes, and then click **OK**.

Products are now mounted in the new version also.

For more information about working with version layers, see "[Working With Version Layers](#)" on page 97.

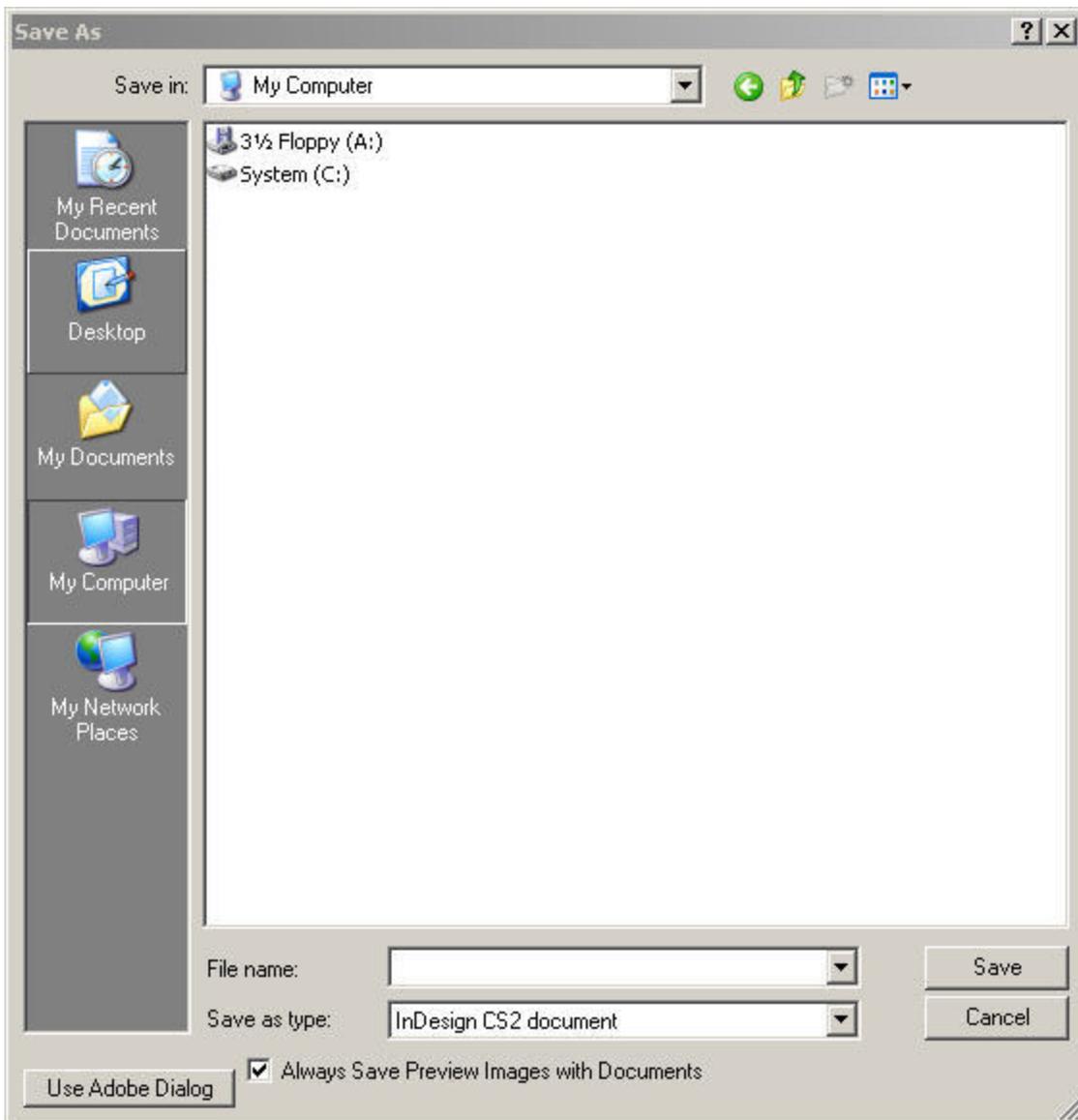
3. Optionally, you can check database for updates before saving the documents back to STEP.

For more information about checking for STEP PIM database updates, see "[Checking Database Update](#)" on page 141.

4. Now save the document. You must always save the document locally first before InDesign allows you to save the page back to STEP.

- On the **File** menu, click **Save**.

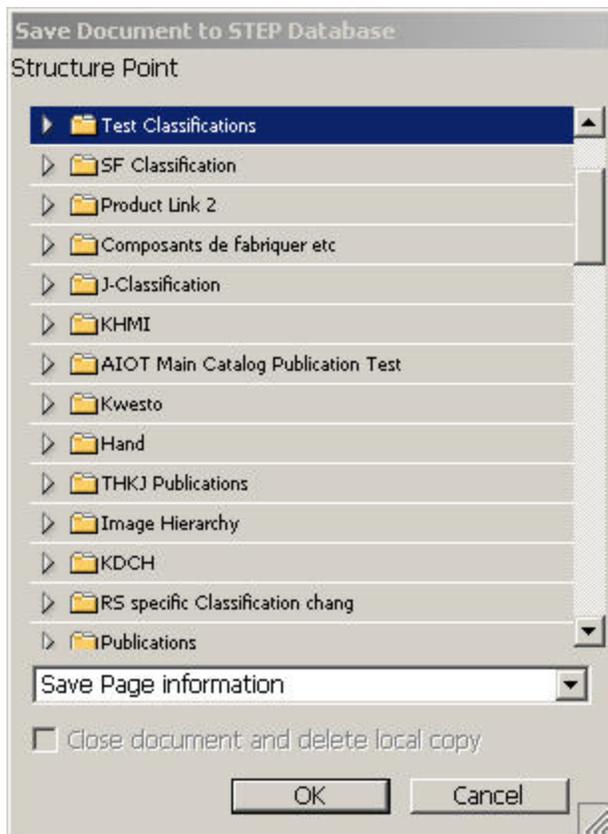
A **Save As** dialog box appears.



Indicate in which folder and under what name the file should be saved, and then click **Save**.

- To save the page back to STEP, click **Save Document to DB** in the **STEP** menu.

A **Save Document to STEP Database** dialog box appears.



Select the publication you are working on, and then click **Save Page Information** from the list.

When clicking **Save Page Information** a thumbnail of your page as well as information regarding the page numbers and the space allocation are saved.

Note: You can also click **Save Document and Page Information** from the list. This will save page information as well as the physical page itself. This means that you can open the documents from STEP.

Click **OK** to save the page back to STEP within the correct publication.

5. After the pages have been saved back to STEP, it is possible to create document indexes. For more information, see "[Creating Document Indexes](#)" on page 120..

Calculation of Space Usage

When pages have been saved back to STEP PIM, then it is possible to see which product is mounted on a page, and how much space it uses on the mounted page. Calculation of space usage is visible in the **Page Data** Editor in STEP PIM.

Note: Calculation of space usage is important to the catalog coordinator, as it makes it possible to determine if the product has enough space on the page to make sales better.

- Unfold the relevant publication, unfold DTP **Documents**, and then click the page you want to see.

Page data		References	Status	Details	Notes
Description					
Name	Value				
ID	stibo.1707490				
Name	4				
Created	Wed Jun 06 23:05:18 CEST 2007				
Status					
Pagenumber	abc 4				
Whitespace area	t23 -30796.0 mm2				
Products					
ID	Name	Space Used	Page Type		
4013-059	4013-059	3368.0 mm2	Actual		
4015-979	4015-979	3291.0 mm2	Actual		
5007-116	5007-116	3593.0 mm2	Actual		
5007-129	5007-129	3482.0 mm2	Actual		
5009-754	5009-754	3694.0 mm2	Actual		
5003-143	5003-143	3368.0 mm2	Actual		
5007-324	5007-324	3485.0 mm2	Actual		
5007-325	5007-325	3511.0 mm2	Actual		
5010-205	5010-205	2961.0 mm2	Actual		
Images					

The space used is per default calculated as a square around each product. Within that square, there are brackets around each line/table/image.

Note: Space calculation can be customized. It is beyond the scope of this User Guide to cover the options for customizing the space usage calculation.

Using the Repeat Function for Subproducts

Use the **Repeat** function to repeat XML tags for subproducts.

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'n'design 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 specific 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.

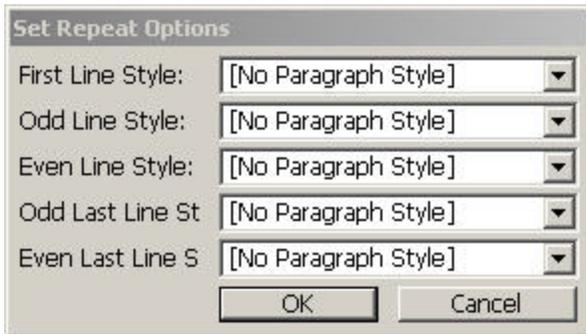
Note: A more complex presentation is to build a STEP table, as this provides more complex formatting options.

To use the Repeat function:

1. Within the InDesign text frame, select the XML tag in which you want the repeating text. One or several STEP XML tags can be selected.
2. In the **Repeat Sep.** field (in the **STEP Template Palette** panel), set a "Repeat Separator" string or character. The most commonly used separators are **\n** (hard return), **\r** (soft return) and **\t** (tab).

This separator string will be placed in-between the individual product rows in the product family.

3. In case you want individual rows to have different styles applied:
 - In the Options menu, click **Repeat Options**. A **Set Repeat Options** dialog box appears.



Activating the “**Set Repeat Options**” dialog box will enable you to assign specific InDesign styles to the rows in the table created by the repeat function.

- Define your repeat options, and then click **OK**.
1. Mark up the relevant tag markers in your text frame.
 2. In the Options menu, click **Repeat Selection** to insert the repeat tag into your XML tag structure in the text frame.

Creating an Index Words Structure

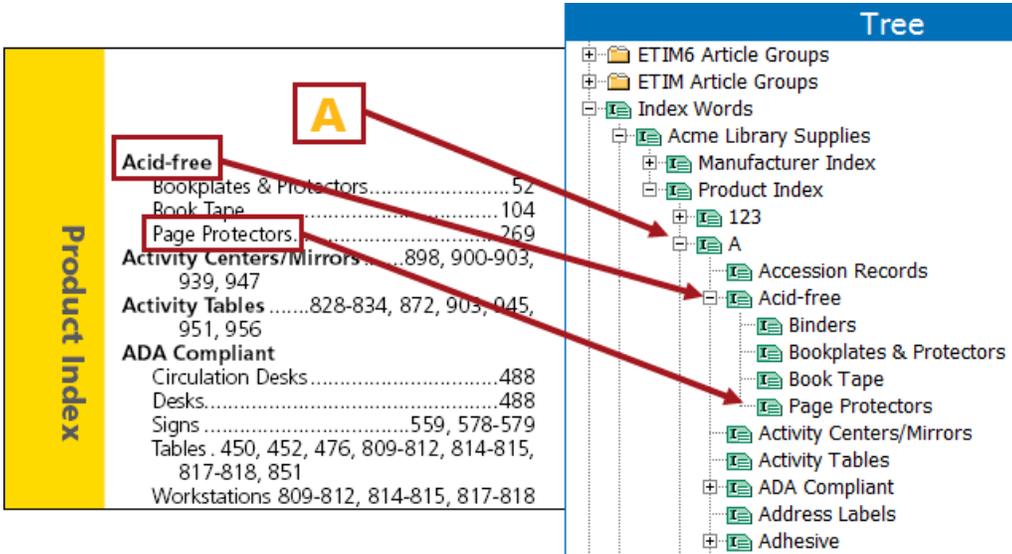
In order to generate and extract an alphabetical index from a publication in STEP, a hierarchy of **Index Words** must first be created. These words must then be linked to the products that should appear in the index. Index words are created in the Tree under the Index Words root node and can be linked 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		B
	Acid-free		Back Room Shelving
	Bookplates & Protectors.....52		See Utility Shelving9999
	Book Tape.....104		Bags
	Page Protectors.....269		See also Canvas Tote Bags9999
	Activity Centers/Mirrors898, 900-903, 939, 947		Book.....148, 1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057
	Activity Tables828-834, 872, 903, 945, 951, 956		Browsing Tote.....148, 151, 1056-1057
	ADA Compliant		Custom Imprinted.....149
	Circulation Desks.....488		Hanging185-189
	Desks.....488		Interlibrary Loan.....148-150
	Signs.....559, 578-579		Library & Reading Promotion148, 1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057
	Tables .450, 452, 476, 809-812, 814-815, 817-818, 851		Mailing.....148-149
	Workstations 809-812, 814-815, 817-818		Mesh Media188
	Address Labels .16-17, 19, 55, 57, 146, 242		Multimedia173, 185-189
	Adhesive		Plastic.....1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057
	Pockets.....135-139		Zipper-lock.....173
	Removers.....116, 237		Band Daters144-145
	Transfer Guns & Tape.....112		Banners
	Adhesives		Custom590-591
	Glue.....114-115, 119, 236-238		Flag420
	Mounting ...234, 237-238, 240, 284-285, 551		Library & Reading Promotion ..1022-1025, 1050, 1054-1055
	Acrylic Tape114		
	Reusable.....284-285		
	Rubber Liquid Cream Glue.....114		

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:

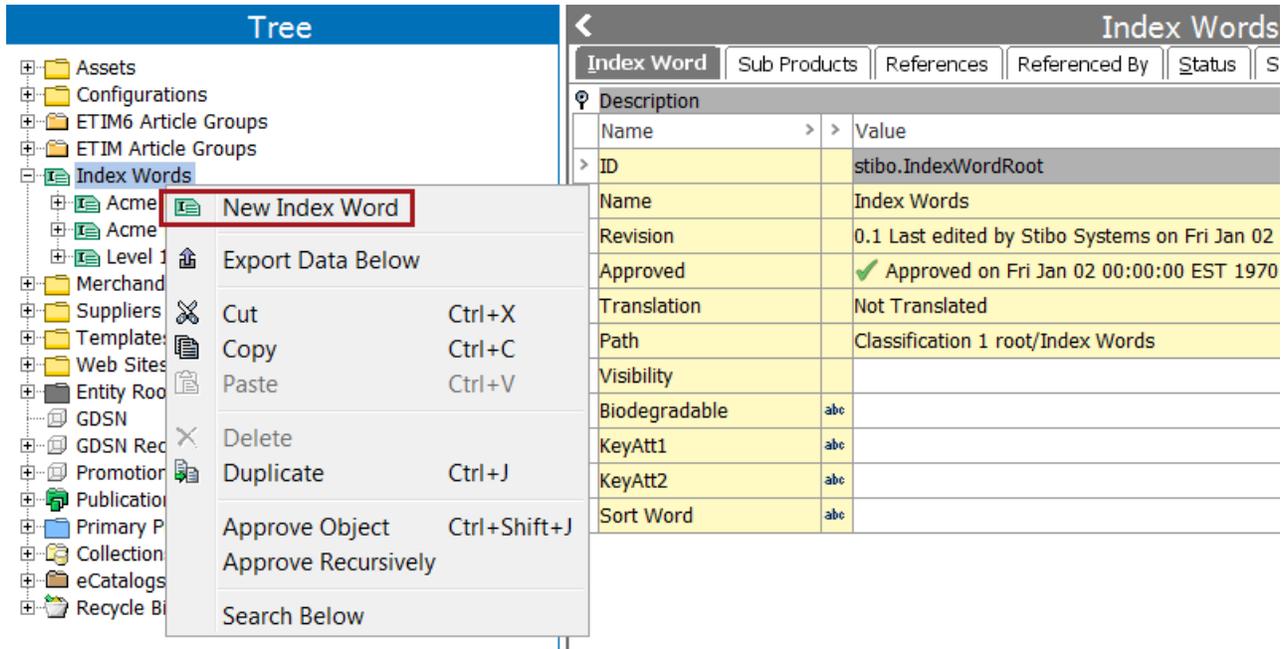


When generating an index, it is possible to use InDesign’s standard features. However, for a typical STEP-produced publication, standard InDesign functionality is not ideal as it typically requires a manual selection of index words on each individual page. An index created in STEP, however, can generate an entire publication index with a single STEPXML export in the 'Alphabetical Index - XML' format.

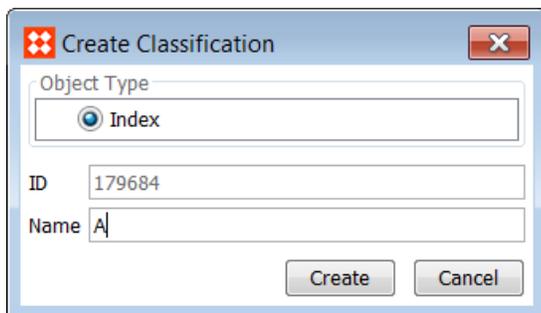
For detailed instructions on how to export an index from a publication in STEP, see the **Creating Document Indexes** section of the **STEP'n'design** documentation.

Creating Index Words

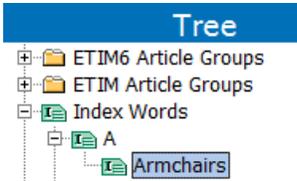
1. In the Tree, navigate to the Index Words root node, then right-click and select **New Index Word**.



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].)



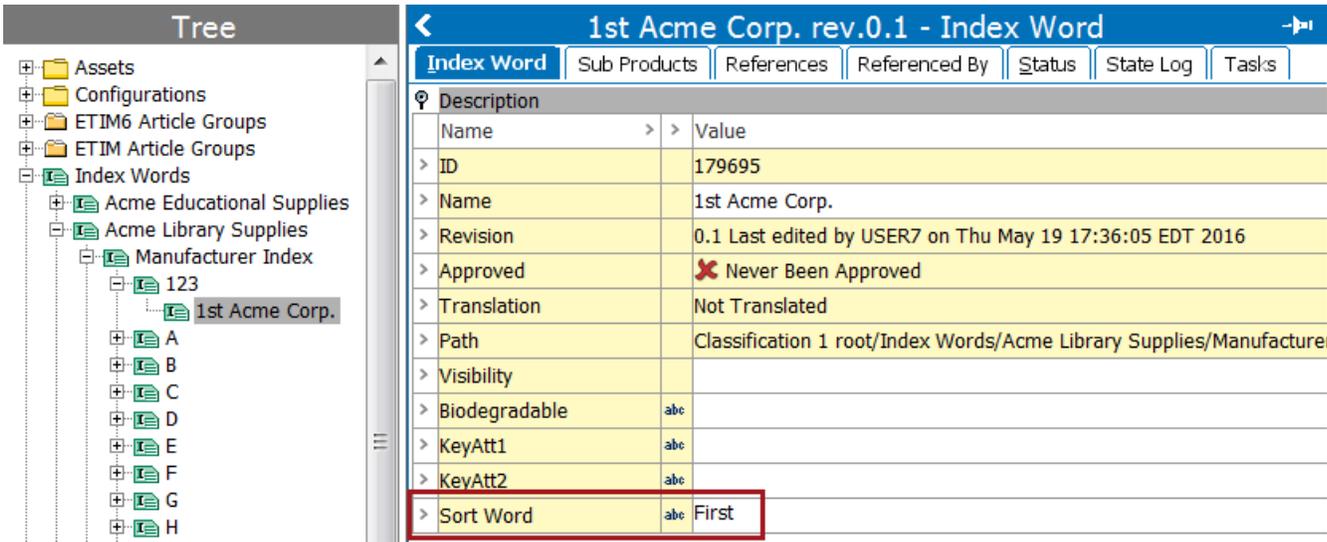
3. To create additional sub-levels of index words, right-click on the index word you just created (in this example, 'A'), select **New Index Word**, then repeat step 2. An unlimited number of sub-levels may be created.



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 **Creating Document Indexes** section of the **STEP'n'design** documentation.

Using a Sort Word

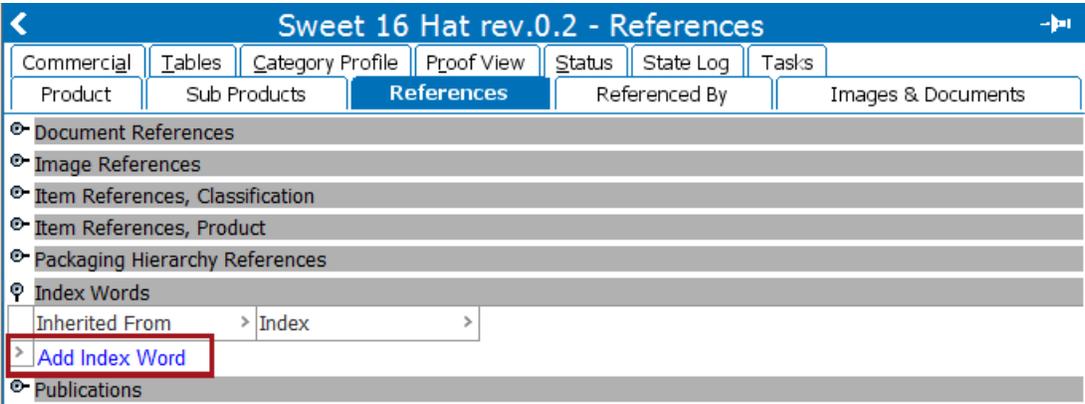
In the index word editor, enter a **Sort Word** if, on output, you would like your index word to be placed in a different area of the index than its alphabetical order. For example, if you are creating a supplier index and one of your company names begins with a numeral, such as '1st Acme Corp.', you 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.



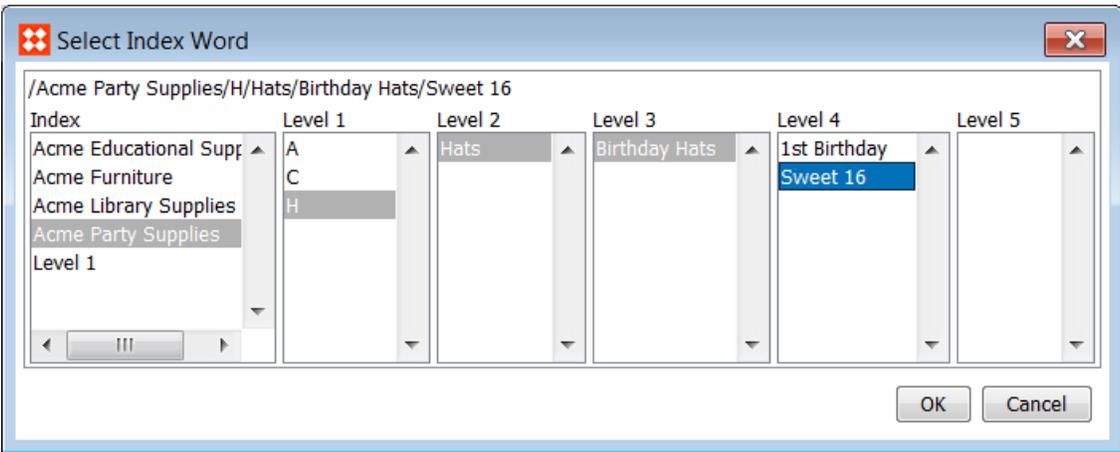
Linking Products to Index Words from the Product Hierarchy

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.

Index Words						
Inherited From	Index	Level 1	Level 2	Level 3	Level 4	
> Locally defined	Acme Party Supplies	H	Hats	Birthday Hats	Index Words/Acme Party Supplies/H/Hats/Birthday Hats/Sweet 16	>
Add Index Word						

For more information on this system setting, see the **Product Information Manager Default Settings** section of the **System Setup / STEP Super User Guide** 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.'

Confetti Makers rev.0.1 - Sub Products			
Index Word		Sub Products	
View: Show all			
Name	ID	Name	Obj
Confetti Maker	179780	Confetti Maker	Iter
Confetti Makers	179779	Confetti Makers	Iter

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. This means that an index word that is linked to a parent product will inherit to 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.

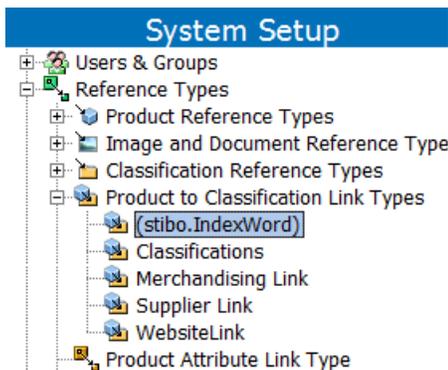
The **Inherited From** column displays the level at which the index word is linked in the hierarchy. In the following example, the words 'Hats' and 'Birthday Hats' are linked to the parent product 'Paper Hats.' The index word 'Sweet 16' is linked locally ('Locally defined') on the child product.

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 **Reference and Link Types** section of the **System Setup / STEP Super User Guide** documentation.

Note on the Index Word Product to Classification Link Type

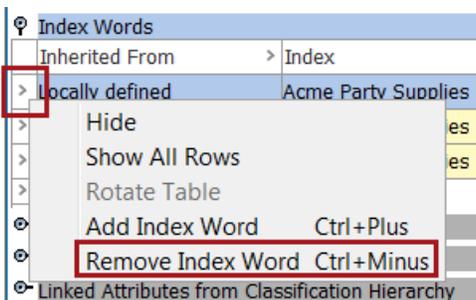
The Index Word product-to-classification link type (ID = stibo.IndexWord) is a hidden object in STEP. It can only be accessed by searching for its ID in the **Goto** field or on the **Search** tab. Typically, no configuration changes should be made to this object. However, an occasional configuration need may arise, such as the need to make the link type externally maintained.



Unlinking Products from Index Words

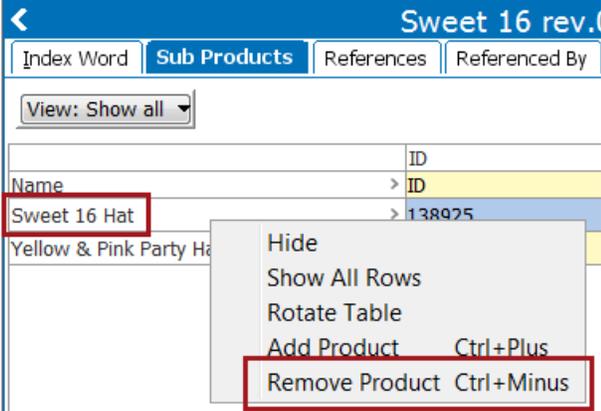
Unlinking From the Product Hierarchy

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**.



Creating Document Indexes

This section provides information about creating document indexes after the finalized pages have been saved back to STEP.

Generally, STEP'n'design uses standard InDesign functions in the creation of document indexes such as indexes and tables of contents.

This section briefly describes two recommended strategies for creating document indexes such as tables of contents and indexes.

Table of Contents

To create a traditional table of contents (the one you typically find in the beginning of a catalog or section) it is recommended to use the standard table of contents function in InDesign.

For more information about creating a standard table of contents in InDesign, see the topic "Basic steps for creating a table of contents" in the InDesign online help. (Press F1 on keyboard).

Note: When creating a standard table of contents in InDesign, you most likely do not have to style up manually any of the table of contents entries (such as the headlines or sub-headlines) as these styles probably already exist in your document.

Indexes

You can create different types of indexes in STEP, e.g. an Alphabetical Index or a Stock number Index.

Examples of index words and levels in an alphabetical index could be names such as:

- Chairs
- Swivel chairs
- Filing cabinets
- Tables
- Workstations

Examples of index words in a stock number index could be numbers such as:

- 100
- 1002345
- 1003456
- 200
- 2001234

Index word are created in the Tree under the **Index Words** tree node and can be linked to as many products as needed. You may e.g. need to link a Product Family: Chairs to the index words "Chairs" and "Furniture". And, a leaf product could be linked to the index words "Chairs", "Swivel chairs" etc.

When generating an index, it is possible to use InDesign's standard features. For instance, a stock number index can be easily created by having all stock numbers formatted with a specific InDesign style, and then using that style to create an alpha-sorted table of contents. For more information about creating a standard Index in InDesign, see the topic "Index" in the InDesign Online Help. (Press F1 on keyboard).

Note: For a typical STEP-produced product catalog, the functionality of standard InDesign is not ideal, as it—in most cases—requires a manual selection of index words on each individual page.

Exporting Index Data from STEP

Before you can create an Index in InDesign, the relevant Index words must be created in STEP PIM, and then exported to an XML file from STEP.

The index export is a specific output format, which you activate within the STEP Export Manager. Name is Alphanumerical Index.

Using the standard STEP Export Manager mapping tools, you can determine which STEP attribute you want in your index output (Product Name or Short Description are two typical choices).

Page number is normally the attribute named Page Numbers (ID: ProductPageNumber). This attribute is automatically populated with actual InDesign page numbers once you upload an InDesign document to STEP.

The STEP Export Manager also enables you to select sort sequence of index words, as well as the separator the system should add between multiple page numbers (such as 1-3 or 1...3).

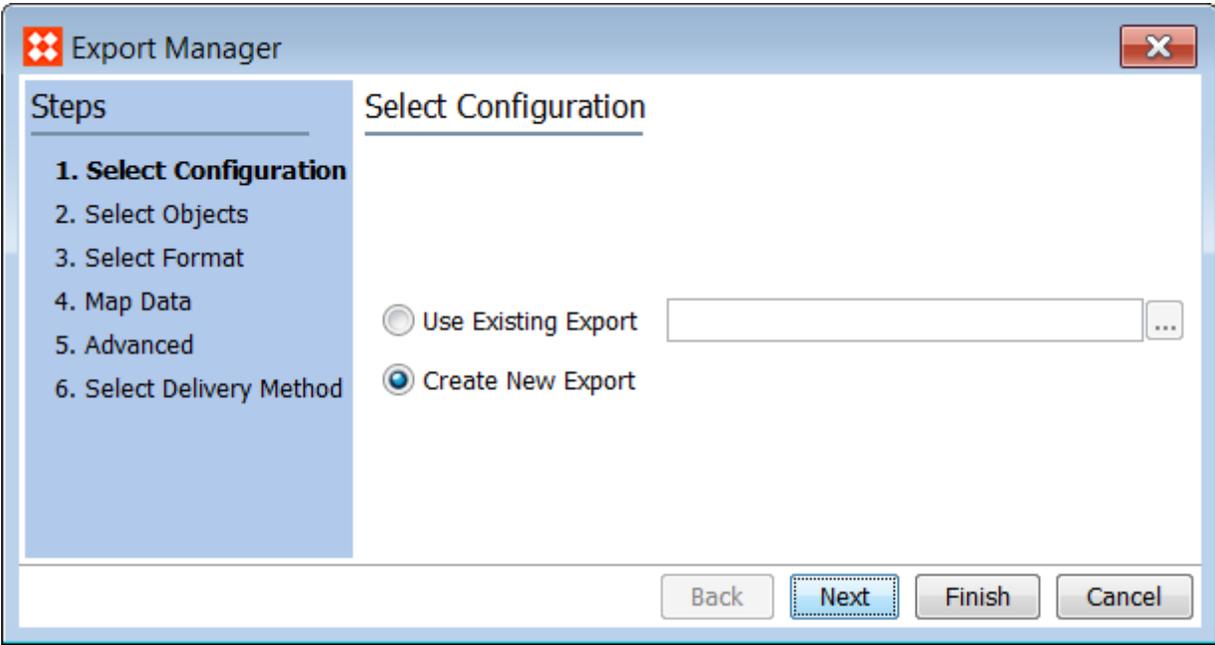
The exported index will organize the index entries into XML tag structures, such as:

```
<Level1>  
<Word>Laser Printer</Word>  
<PageNumber>2,5-6</PageNumber>  
</Level1>
```

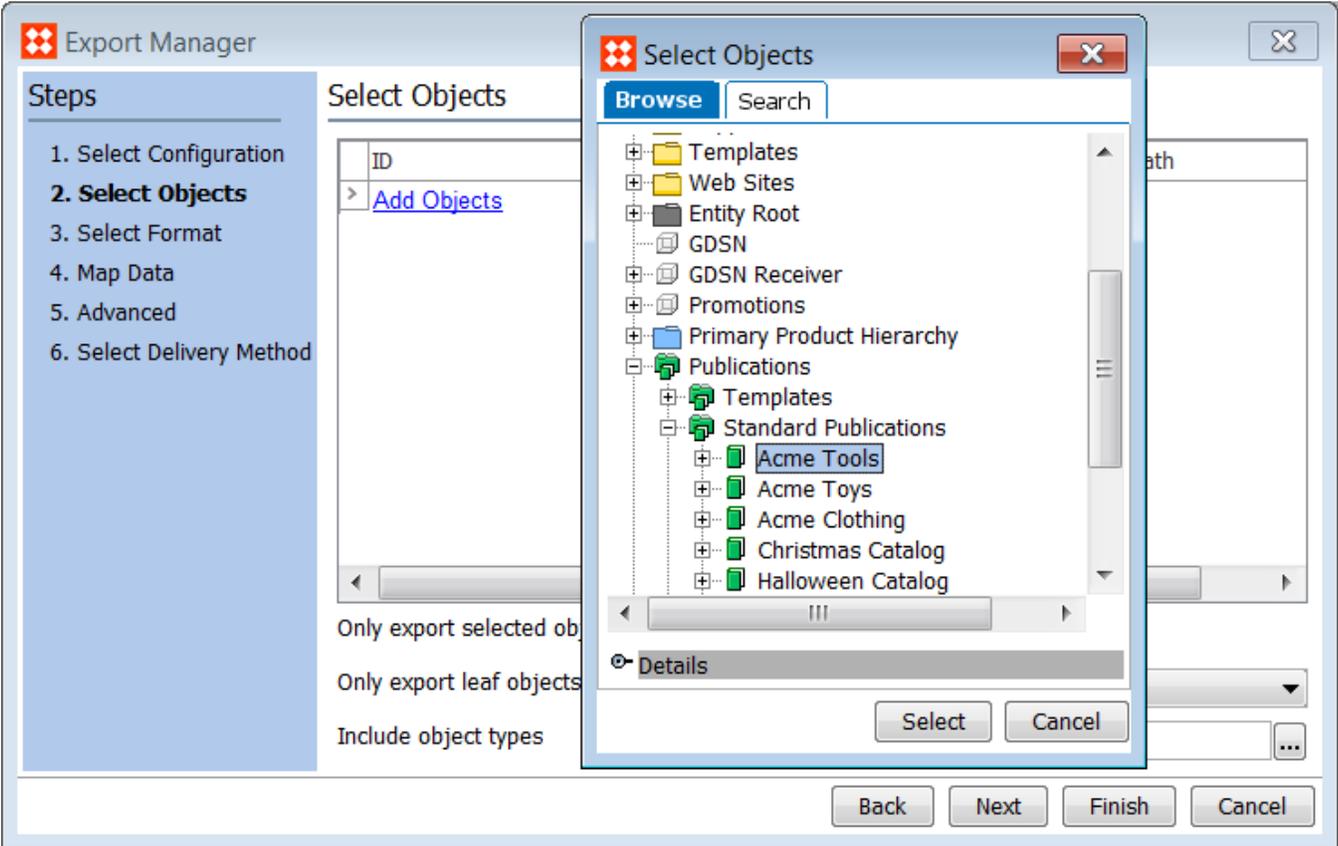
Note: The names of the tags are important to remember, as they will be used for formatting and styling later.

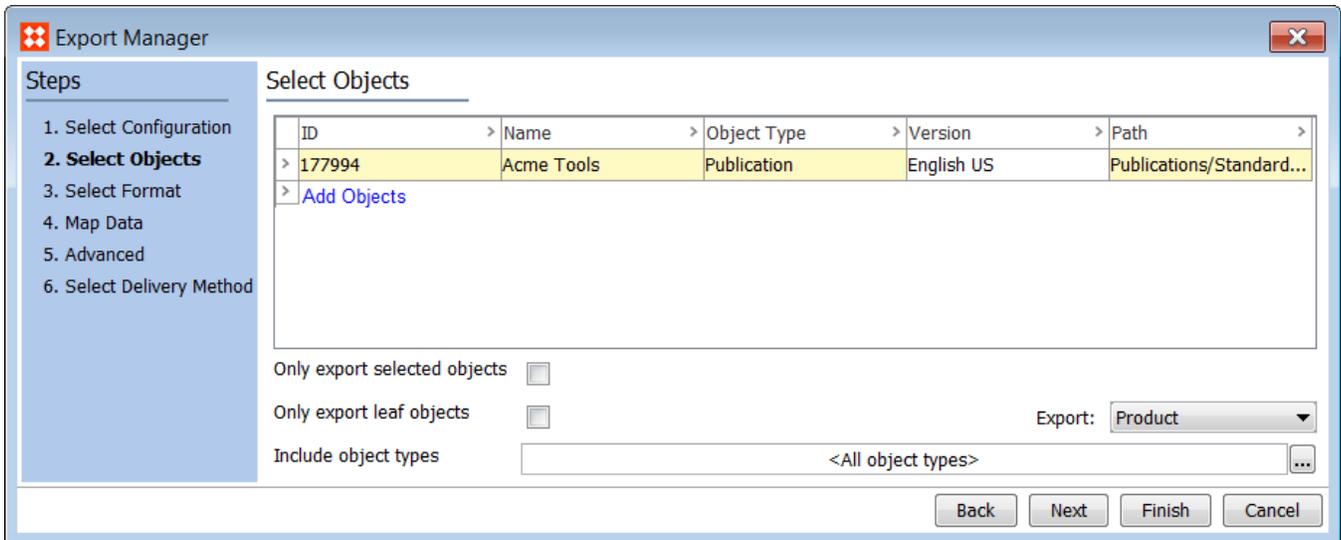
To export an index using STEP Export Manager:

1. Navigate to File > Export > Data. The Export Manager dialog displays. Select **Create New Export**, then click **Next**.

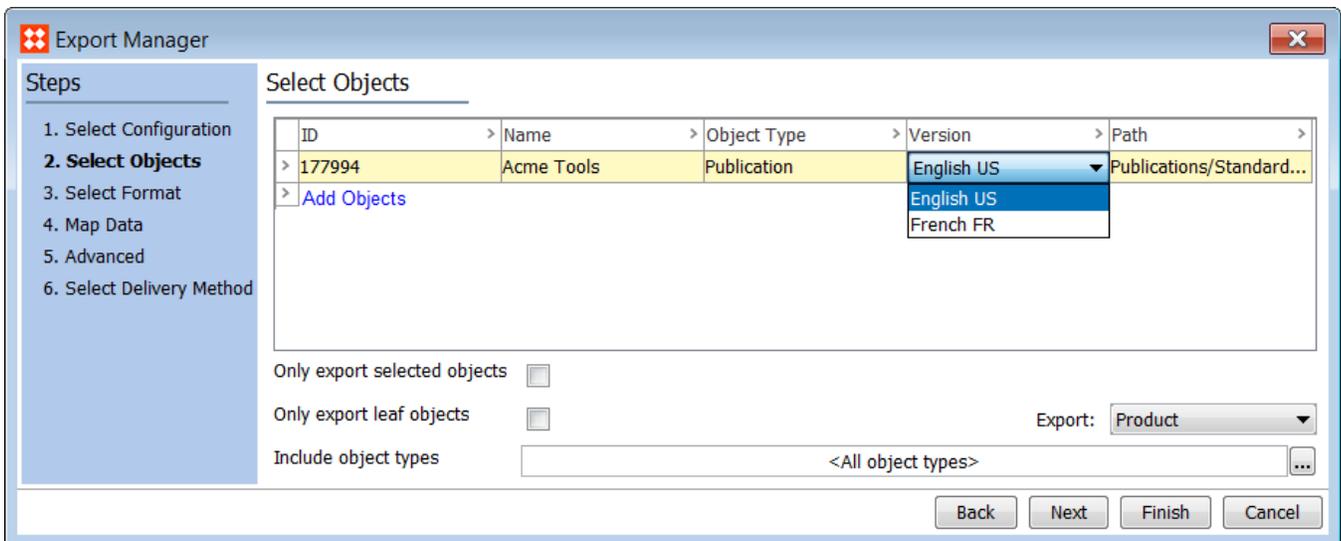


2. To define the publication from which you would like to export index words, click **Add Objects**, browse for the relevant publication, and then click **Select**.





- To define from which publication version you want to export index words, click the field in the version column, then select the desired version. Click **Next**.

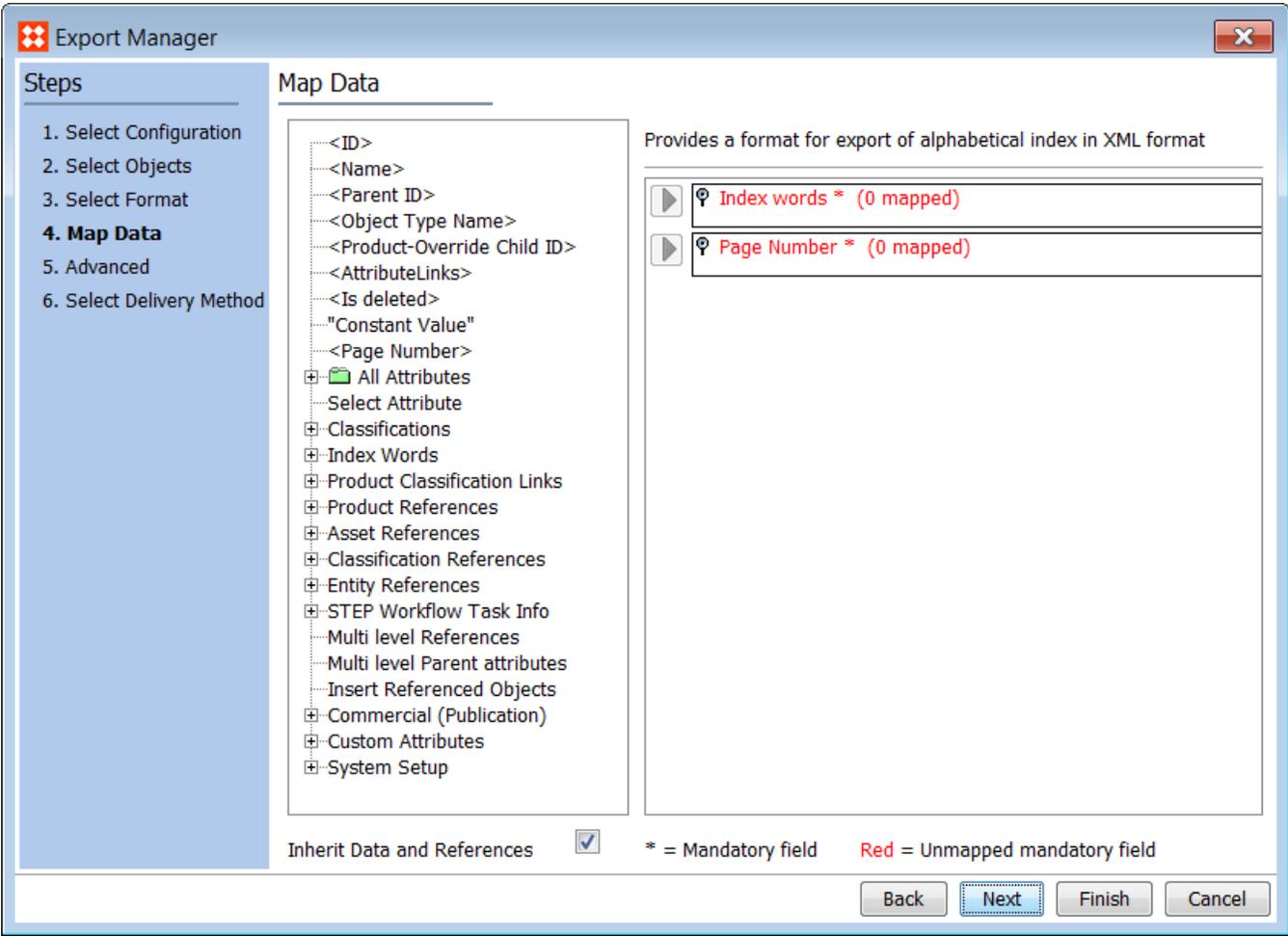


Note: Regarding the **Only export leaf products** check box: When exporting as XML, then this option is ignored.

The screenshot shows a software window titled "Export Manager" with a close button in the top right corner. On the left side, there is a "Steps" sidebar with a list of six steps: "1. Select Configuration", "2. Select Objects", "3. Select Format" (which is bolded and highlighted), "4. Map Data", "5. Advanced", and "6. Select Delivery Method". The main area of the window is titled "Select Format" and contains a dropdown menu currently set to "Alphabetical Index - XML". Below the dropdown, a descriptive text reads: "Provides a format for export of alphabetical index in XML format". There are five input fields: "Sort Language Code" with the value "en", "Sort Country Code" with the value "US", "Page Number Separator" with the value ",", "Page Range Separator" with the value "-", and "Use Numerical Sort" with a dropdown menu set to "yes". At the bottom of the window, there are four buttons: "Back", "Next" (which is highlighted with a dashed border), "Finish", and "Cancel".

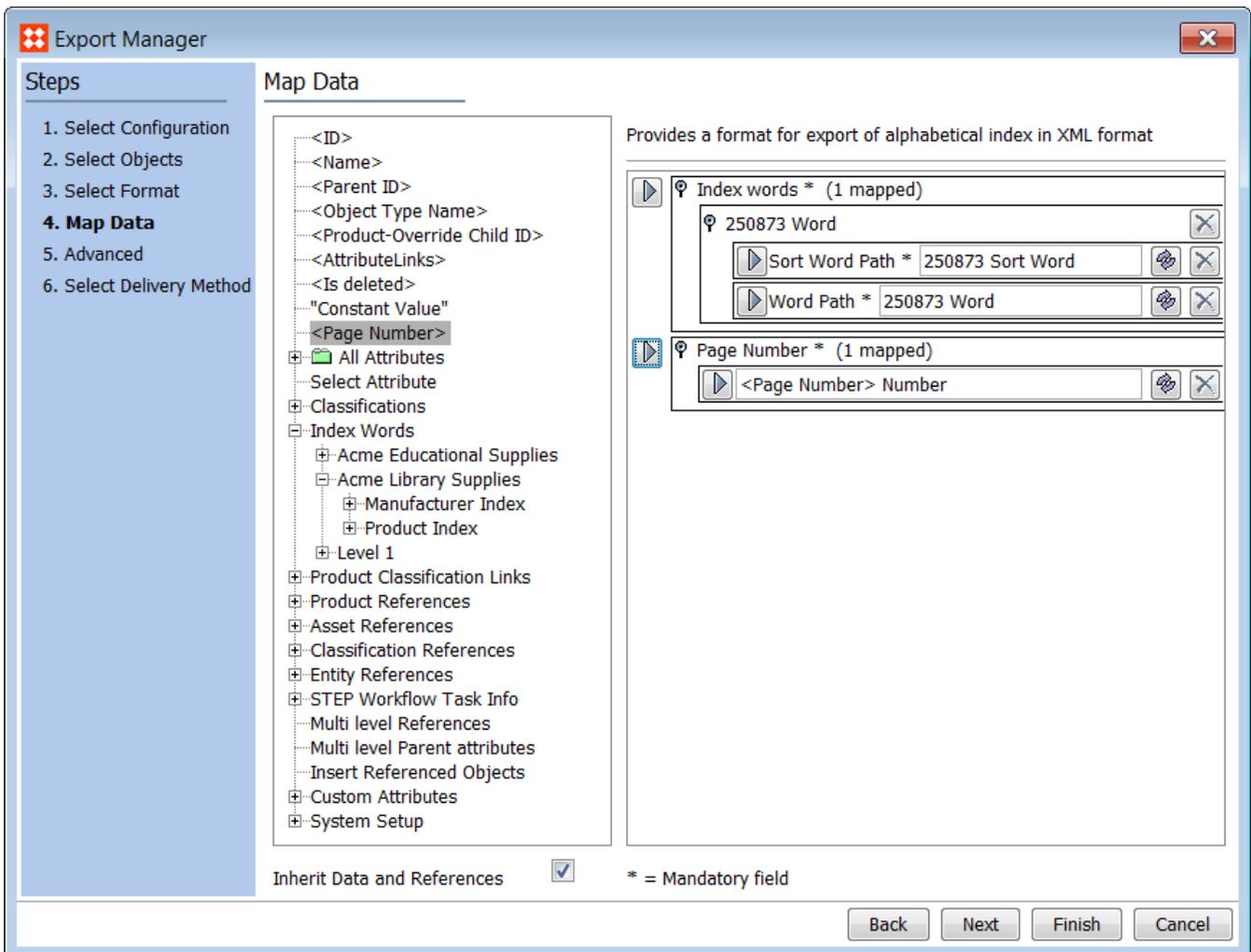
4. From the list, click **Alphabetical index - XML**, then add the relevant information about sort codes and separators (what separator the system should add between multiple page numbers etc.).

Click **Next**. A **Map Index Data** window displays.

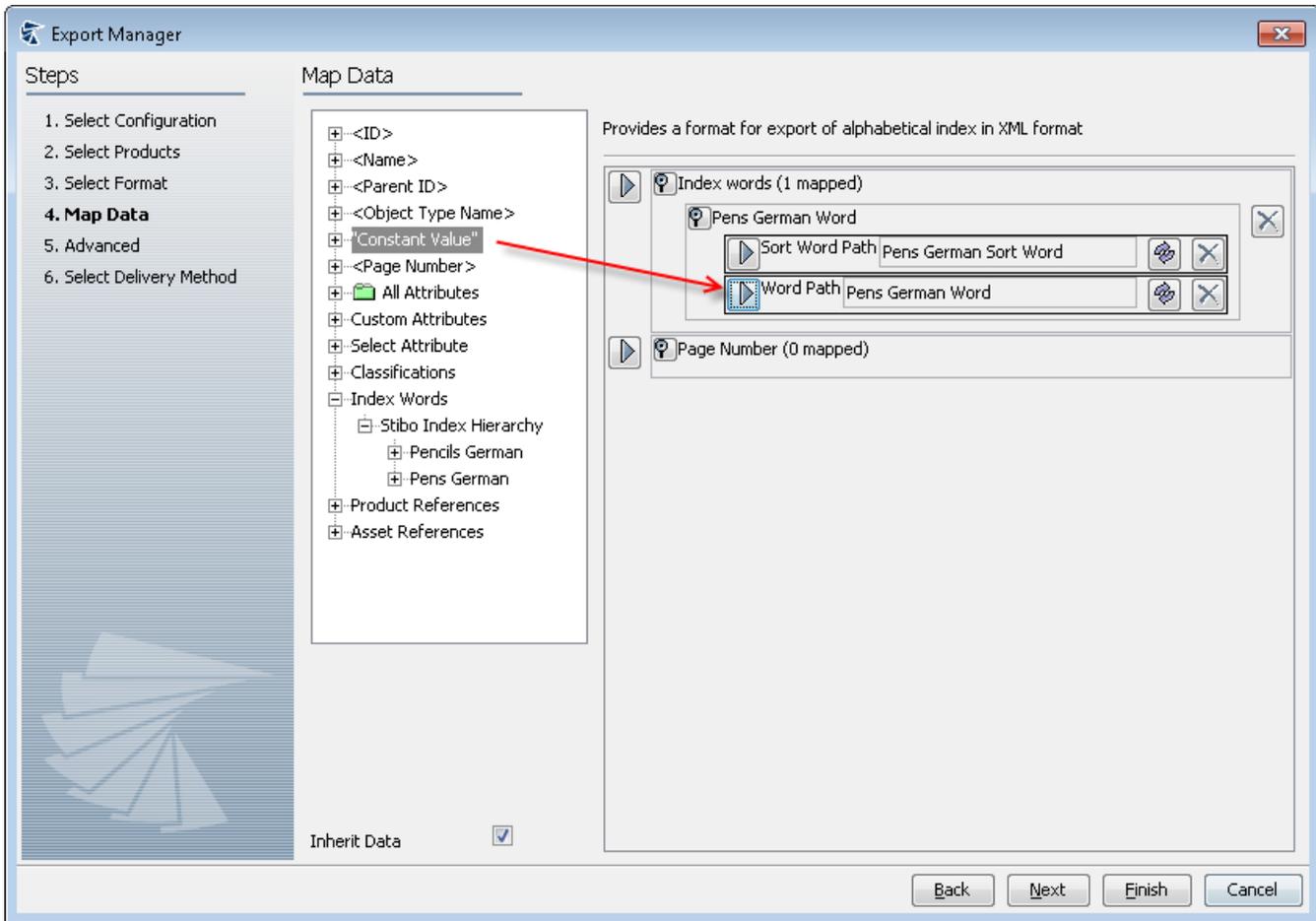


You now need to perform mapping of index data as described below:

- 5. Map the index hierarchy:

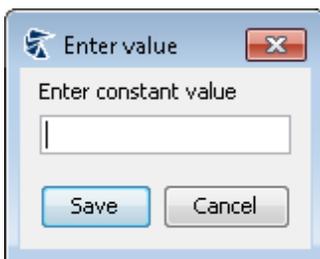


- Unfold the **Index Words** hierarchy, click the relevant index, and then click the arrow to the left of Index words (right side of window).
7. If you want an alphabetic index with Index Letters you must map a constant:

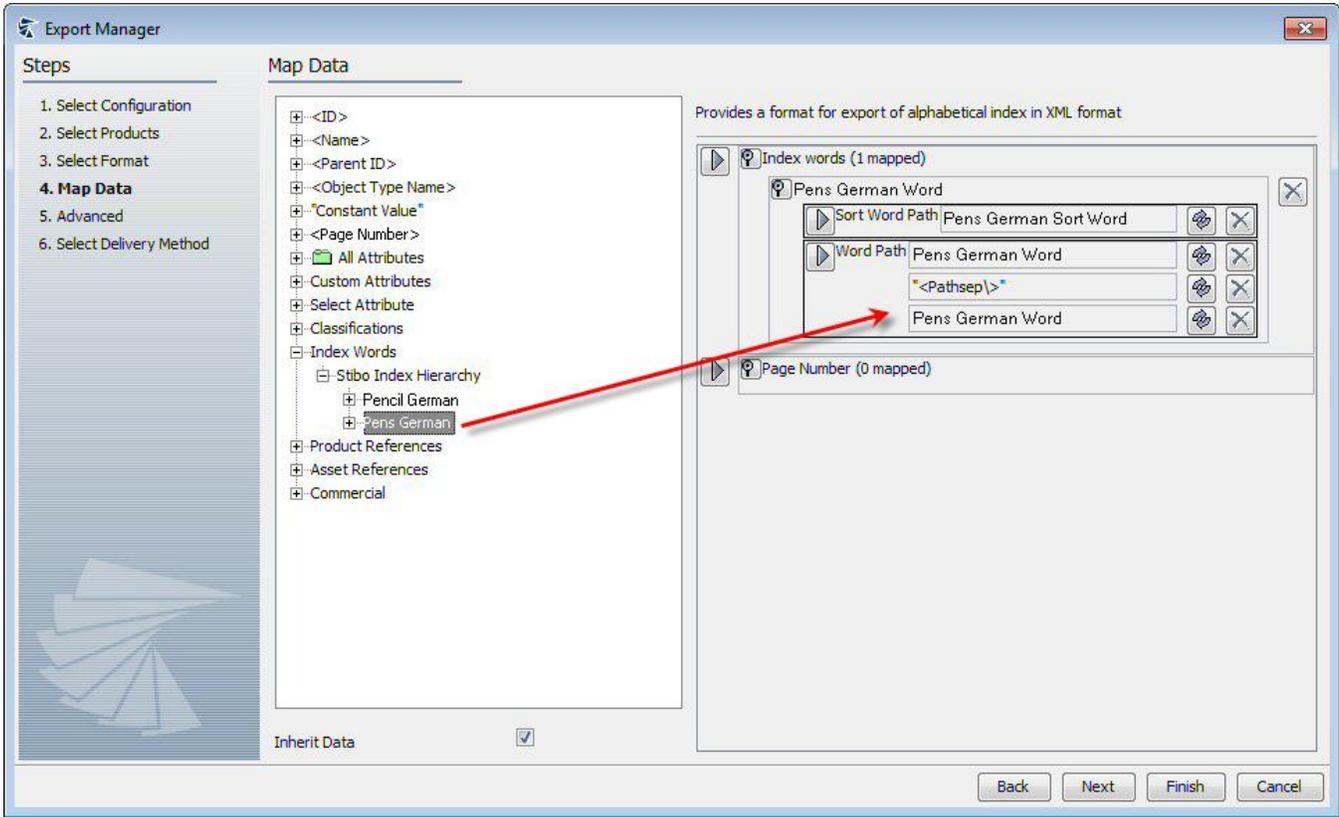


- Unfold the mapped index hierarchy by clicking the flipper icon to the left of it.
- Click **Constant**, and then click the arrow to the left of **Word Path**.

An **Enter Value** dialog box appears.

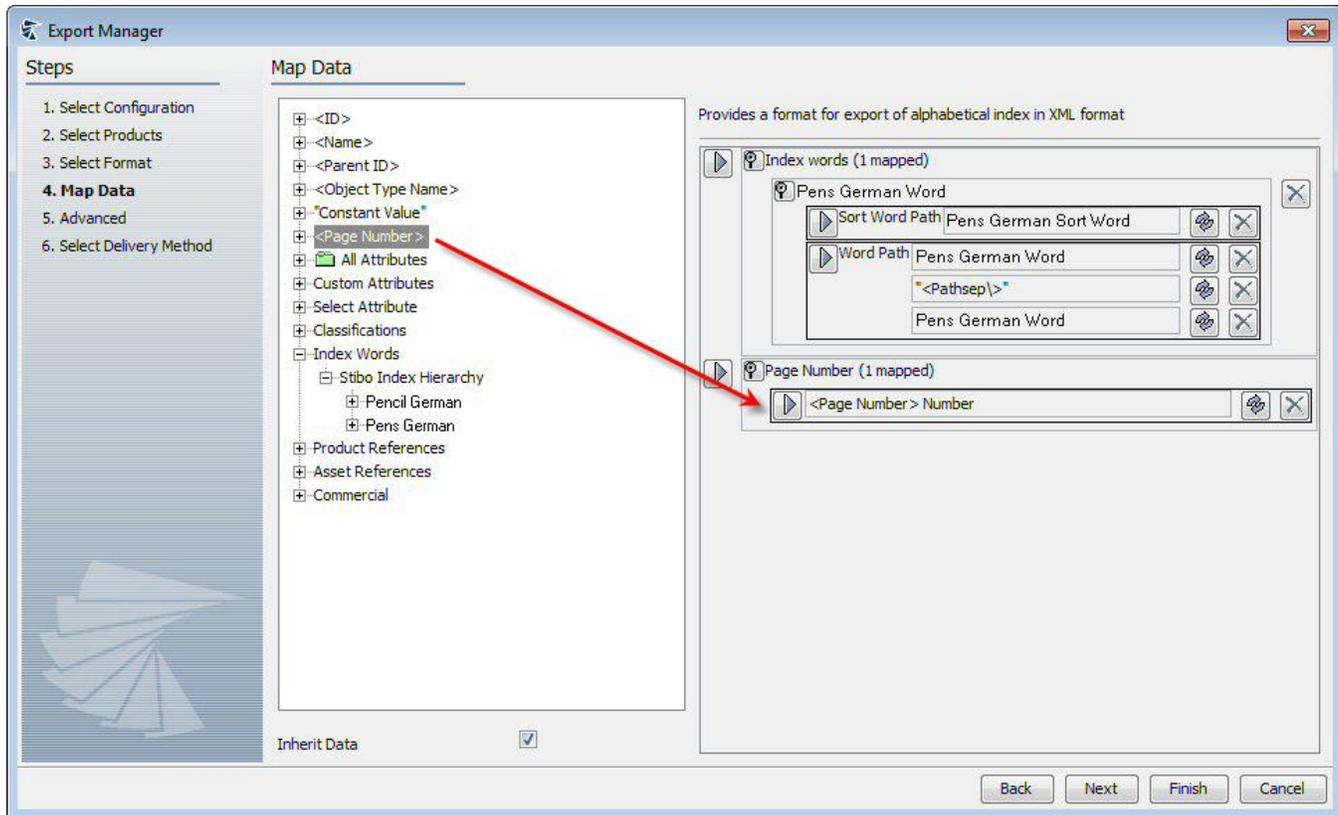


- Type e.g. **<pathsep>**, and then click **Save**. The constant **<pathsep>** is used to identify each single IndexLetter, and to ensure that the same index letter is only shown one time.
8. If you want an alphabetic index with Index Letters you must now map the index hierarchy to the Word path again. The first mapped index will be used for extracting the Index Letter from the Index Word through a transformation (see step 10). The second mapped index will be used for extracting the Index Word.



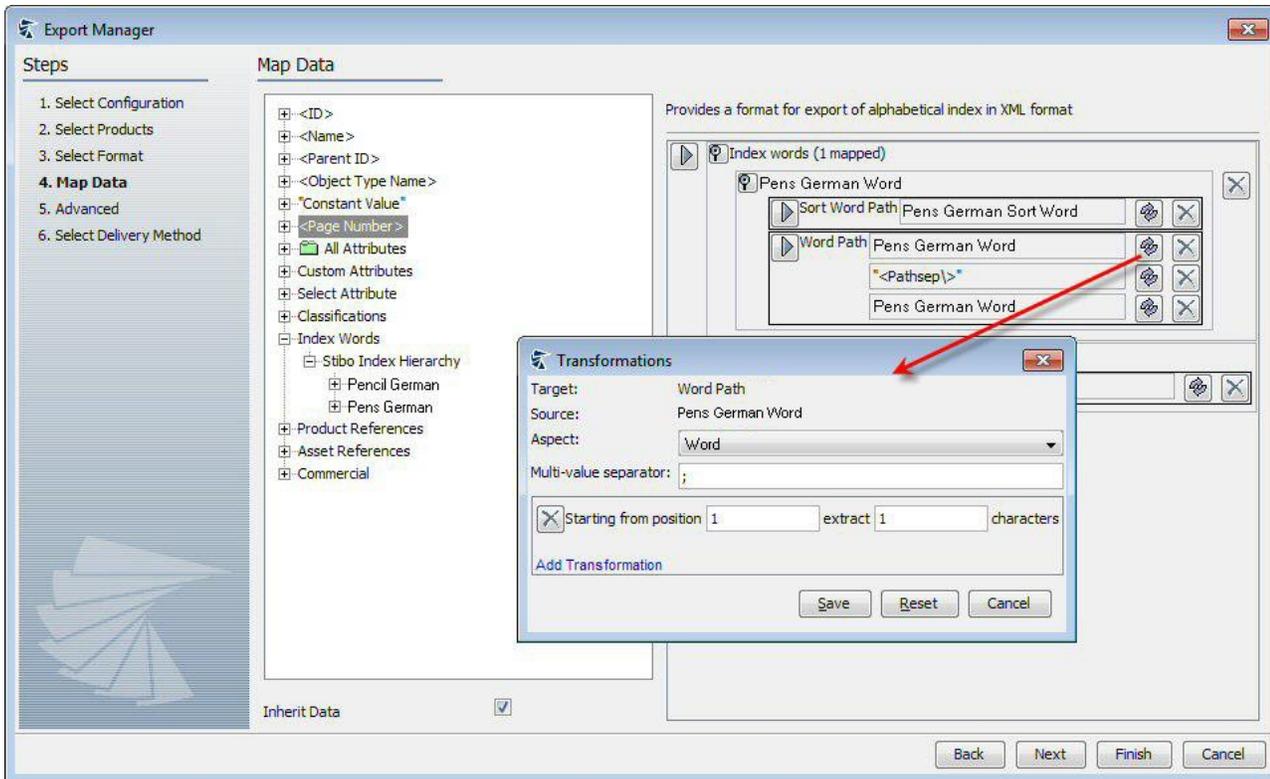
- Click the relevant index under the **Index Words** hierarchy, and then click the arrow to the left of the Word Path (right side of window).

9. Map Page:



- Click **Page**, and then click the arrow to the left of **Page Number**.

10. Make transformations on the relevant mapped entries. If you want an alphabetic index with Index Letters you must make a transformation on the first mapped Index hierarchy:

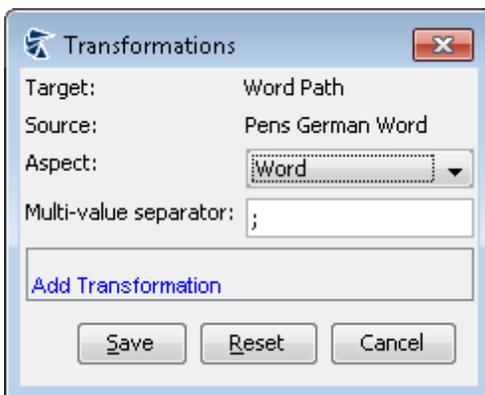


The transformation shown in the illustration outputs the first letter in each word, and is used for the `IndexLetter` when a new letter begins in the index. The constant `<pathsep>` is used to identify each single `IndexLetter`, and to ensure that the same index letter is only shown one time.

If for example you want the first letter in each word outputted and used for `IndexLetter` (A, B, C etc.) when a new letter begins in the index, you must do the following:

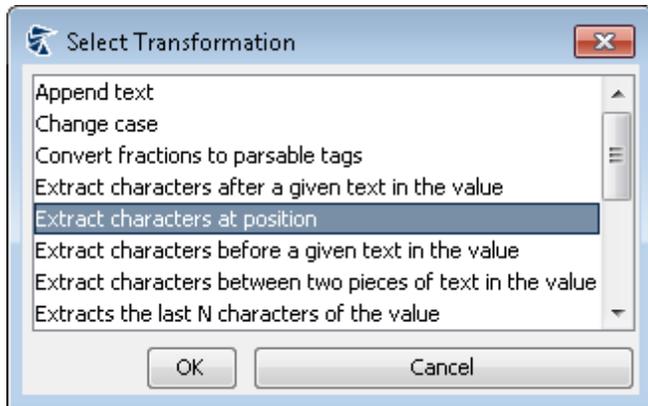
- Click the Transformation icon  next to **Word Path** (testindex Word).

A **Transformations** dialog box appears.

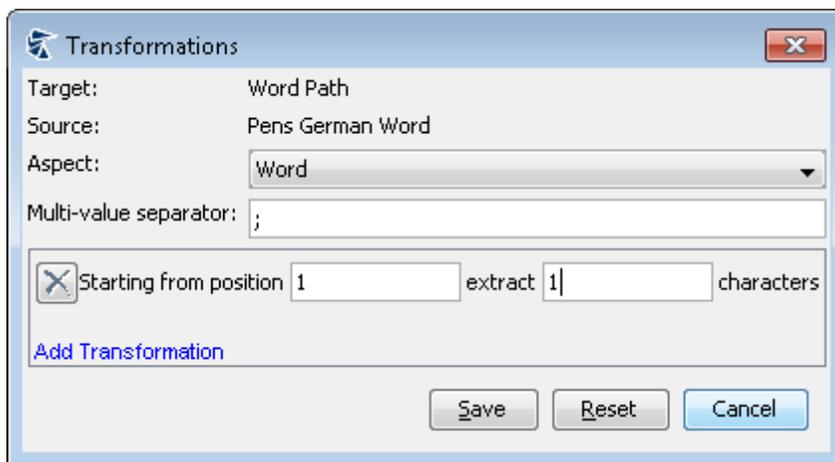


- Click **Add Transformation**.

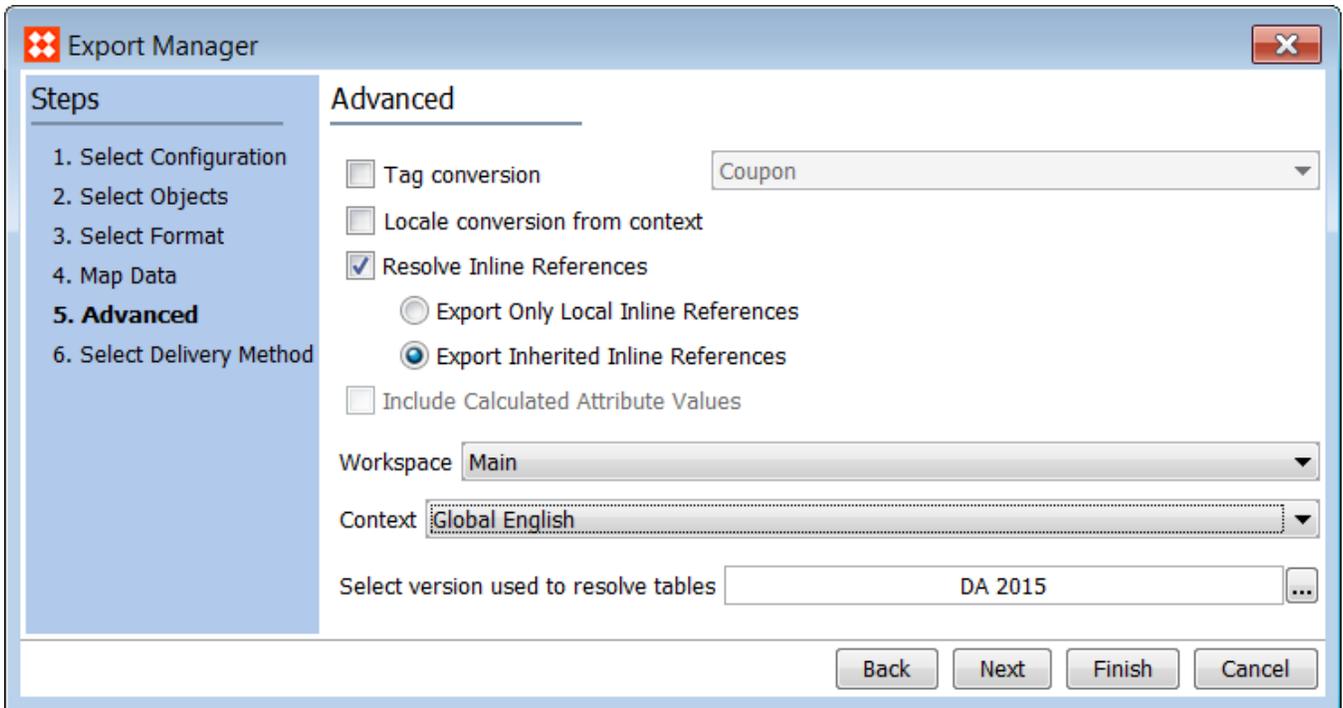
The **Select Transformation** dialog box appears.



- Click the relevant transformation - for example **Extract characters at position**, and then click **OK**.
The following dialog box appears.

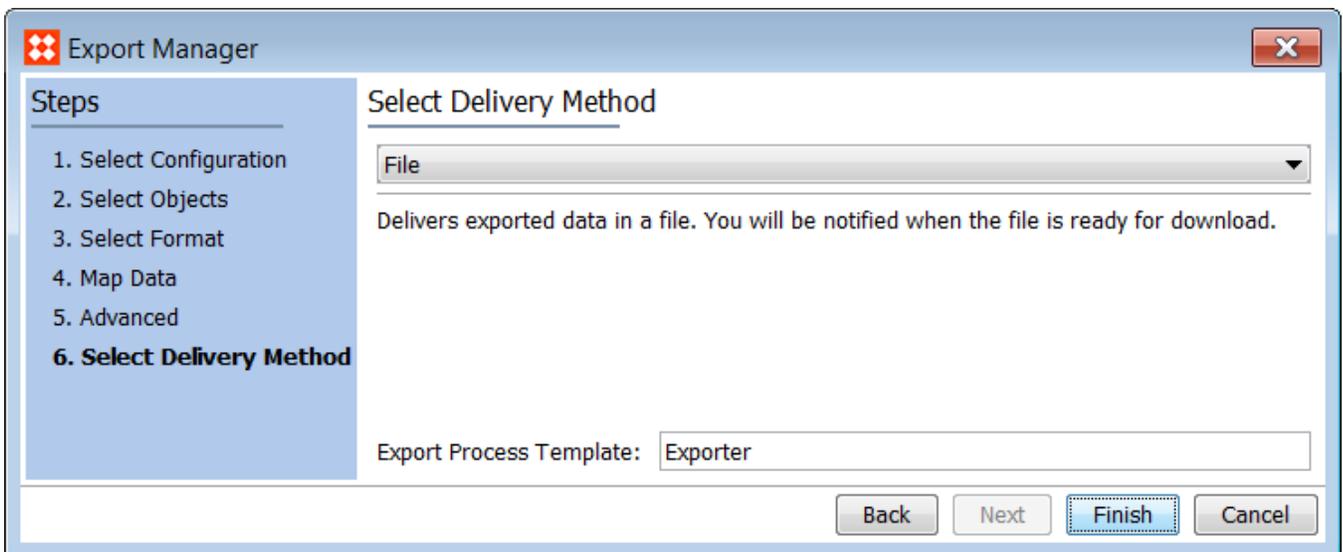


- If you want to extract an IndexLetter, type **1** in the **extract** field, and then click **Save**.
 - Make the needed transformations and remember to click **Save** after each transformation.
 - When finished mapping data, click **Next**.
- An **Advanced** window appears.



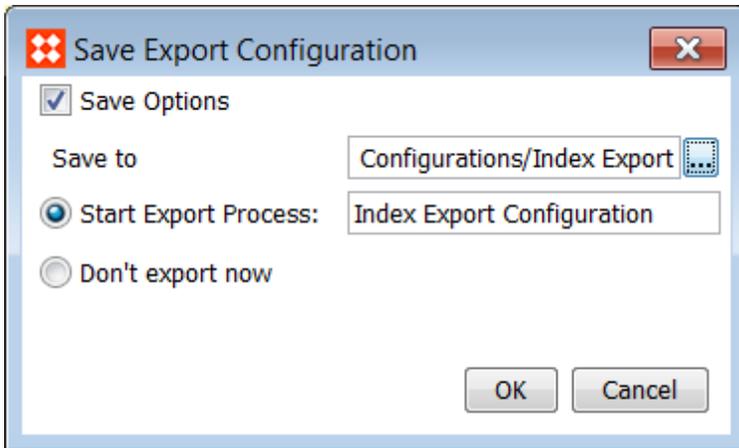
11. The settings in the advanced step are not relevant for exporting index words. Click **Next**.

12. Select delivery method.



- Click the relevant delivery method from the list, and then click **Finish**.

A **Save Export Configuration** dialog box appears.

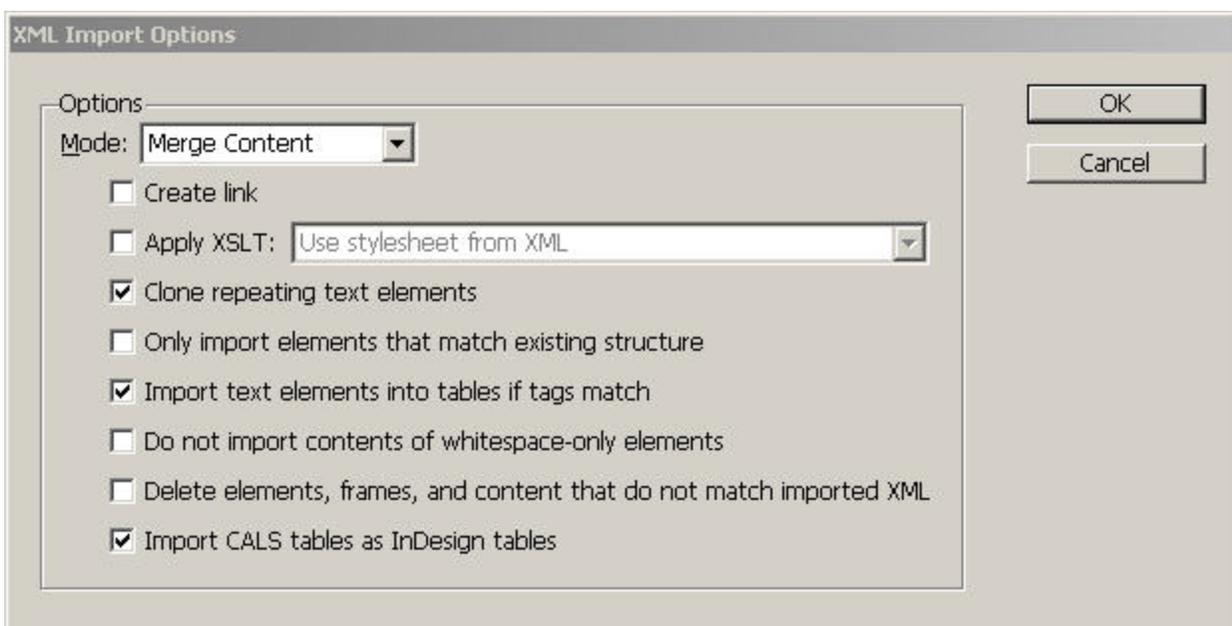


- Define your save and export settings, and then click **OK**.
If clicking **Start export process**, the XML file is exported.

Creating Indexes

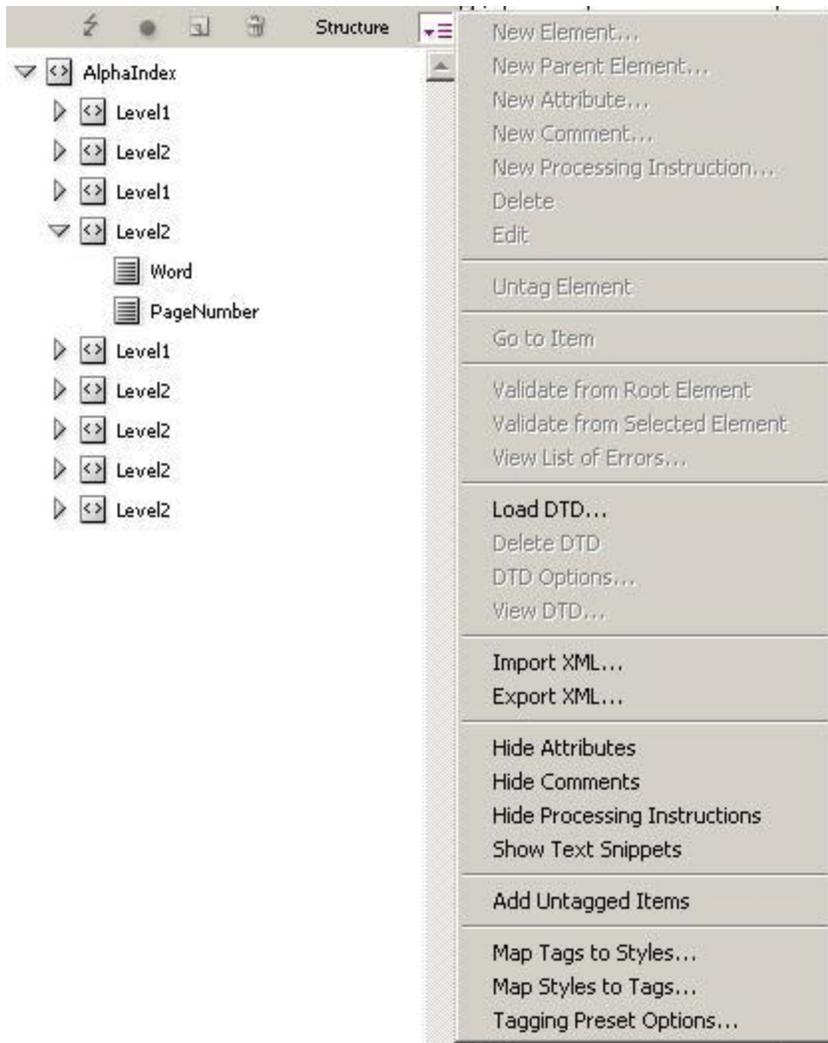
To use the recommended way for making a typical STEP product catalog index:

1. Export the Index out as XML from STEP PIM. For more information, see ["Exporting Index Data from STEP"](#) on page 121..
2. In InDesign, click **Import XML** in the **File** menu to import the exported file into InDesign.
An **Import XML** dialog box appears.
3. Find the XML file you want to import, and then click **Open**.
An **XML Import Options** dialog box appears.



As you can import the Index XML file without touching or changing the XML Import Options, just click **OK**.

After importing your STEP generated XML index file, the index words are made available in an XML hierarchy (left side of screen).



The index tags **<Word>** and **<PageNumber>** (see illustration above) are now selectable from within the XML structure.

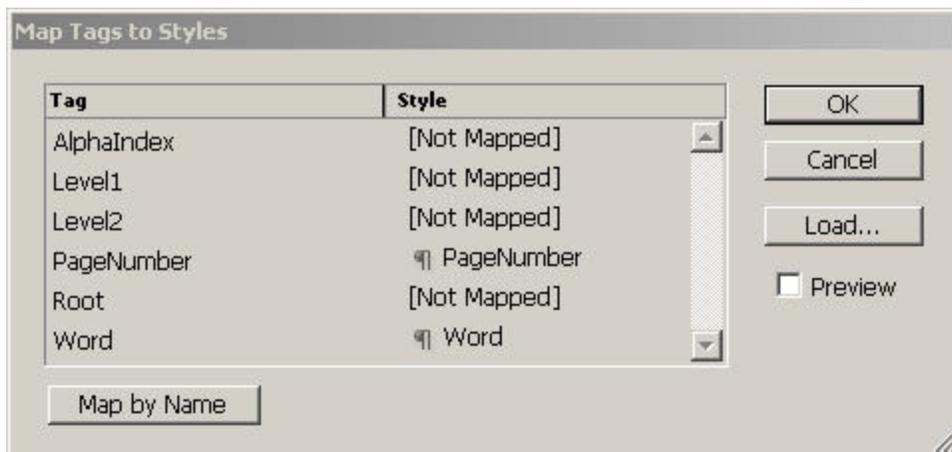
4. Create the needed paragraph styles for each index tag in InDesign.

Note: The naming of the paragraph styles must be identical to the naming of the index tags (in this case “Word” and “PageNumber”) to be able to apply the formatting successfully.

You can format the styles any way you want. For information about using “dot leaders”, see ["Creating Dot Leaders"](#) on the next page.

5. After having set up your styles, click the Options menu (arrow in the top-right corner of the XML hierarchy view), and then click the **Map Tags to Style**.

A **Map Tags to Style** dialog box appears.



- If you have a perfect match between the names of your index tags and the names of your paragraph styles, click **Map By Name**.
Alternatively, map the index tags to the paragraph style one by one by clicking the relevant styles from the style lists.
- Click **OK**.
- When finished mapping index tags to the paragraph styles, draw a text frame on your InDesign page using the Type Tool (T).
- Drag the Index (from the AlphaIndex level in the XML view) and drop it into the created text frame.
The index is now created with the relevant mapped styles applied to it.

Creating Dot Leaders

In many of the indexes, you would want a dot leader (a dotted line of variable width) pre-pending the page number, e.g.:

```
Laser Printer .....1
Inkjet Printer .....2
```

To create a dotted line in your index with STEP and InDesign:

- Make sure that your XML load file contains a character, which will enable you to separate the specific XML tags.

Note: If the load file was not exported with such a character directly from STEP PIM export, you can easily add one using a simple text editor such as WordPad for Windows.

Example:

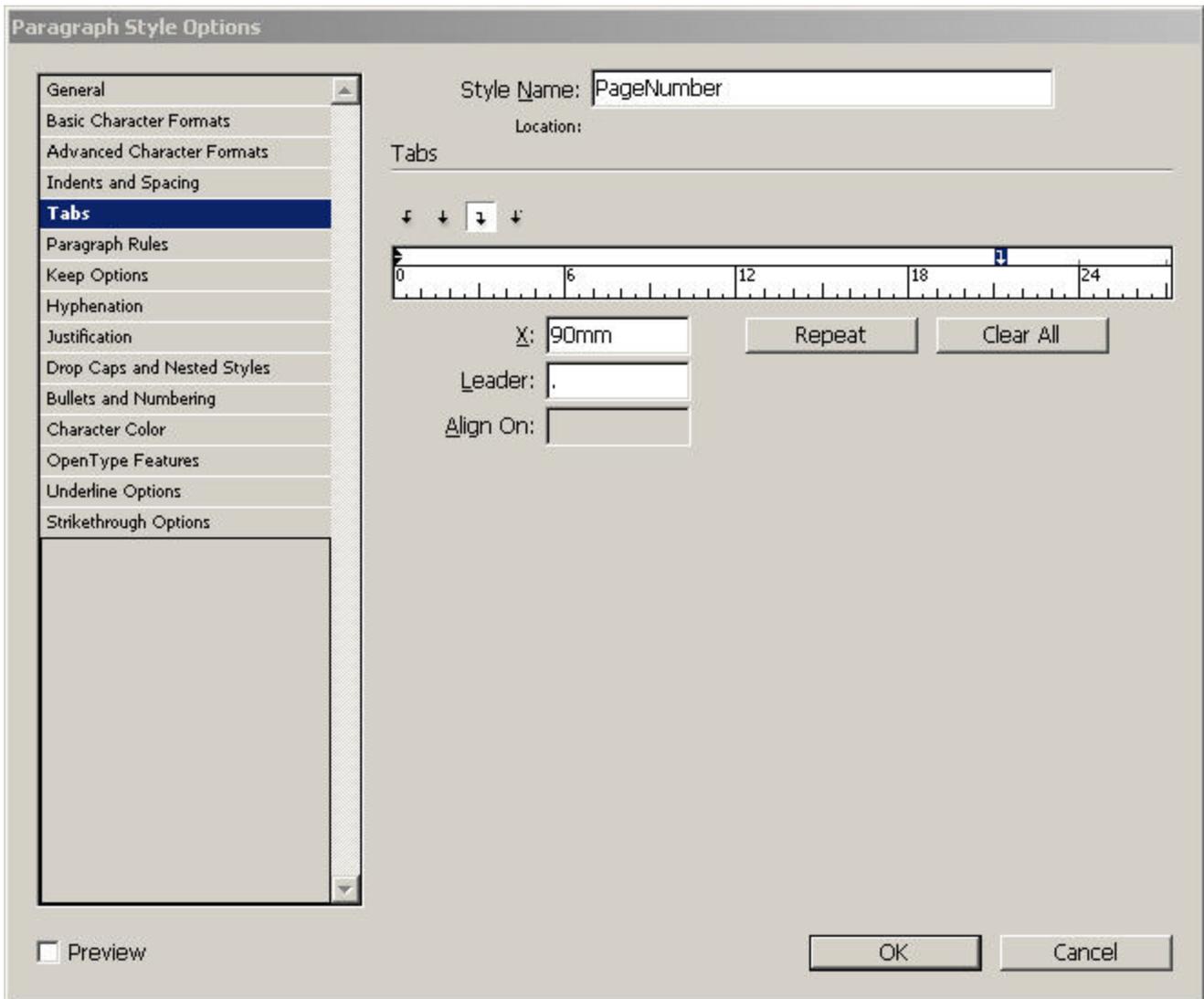
Before replace:

```
</Word><PageNumber>
```

After replace

</Word>#<PageNumber>

2. After you have imported the XML file with the separator character, you can now use that character:
 - to turn your index into an InDesign table by clicking **Convert Text to Table** in the **Table** menu.
 - to format the index any way you want, using InDesign’s table formatting features.
 - to convert the special character to a tab character by clicking **Find/Change** in the **Edit** menu. By now adding a right-aligned tab with a dot leader to your PageNumber style, you can format your index entries with proper, dotted lines (see **Paragraph Style Options** dialog box below).



Once you have configured a tab leader for your page number style, you can make the page number space out to the full width using a dot leader character.

Writing Data Back to STEP

This section describes how you can write certain types of data from your InDesign page back to STEP without having to launch STEP and locate the product and attribute first.

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 can only write data back to the STEP database provided you have the required user privileges.

Note: This means, that you can never write data directly back to the **Approved** workspace, as no users, under normal circumstances, are allowed to change data in the **Approved** workspace.

- Calculated attributes or attributes which have undergone a data transformation (for instance in a table) cannot be written back to the STEP database.
- Graphical formatting such as bold, italic or underscore might be written back to the database if you manage the styles carefully (i.e., if this formatting is tied to InDesign character styles that have corresponding Style Tags in STEP)
- Invalid tags or special characters not defined in STEP PIM can not be written back

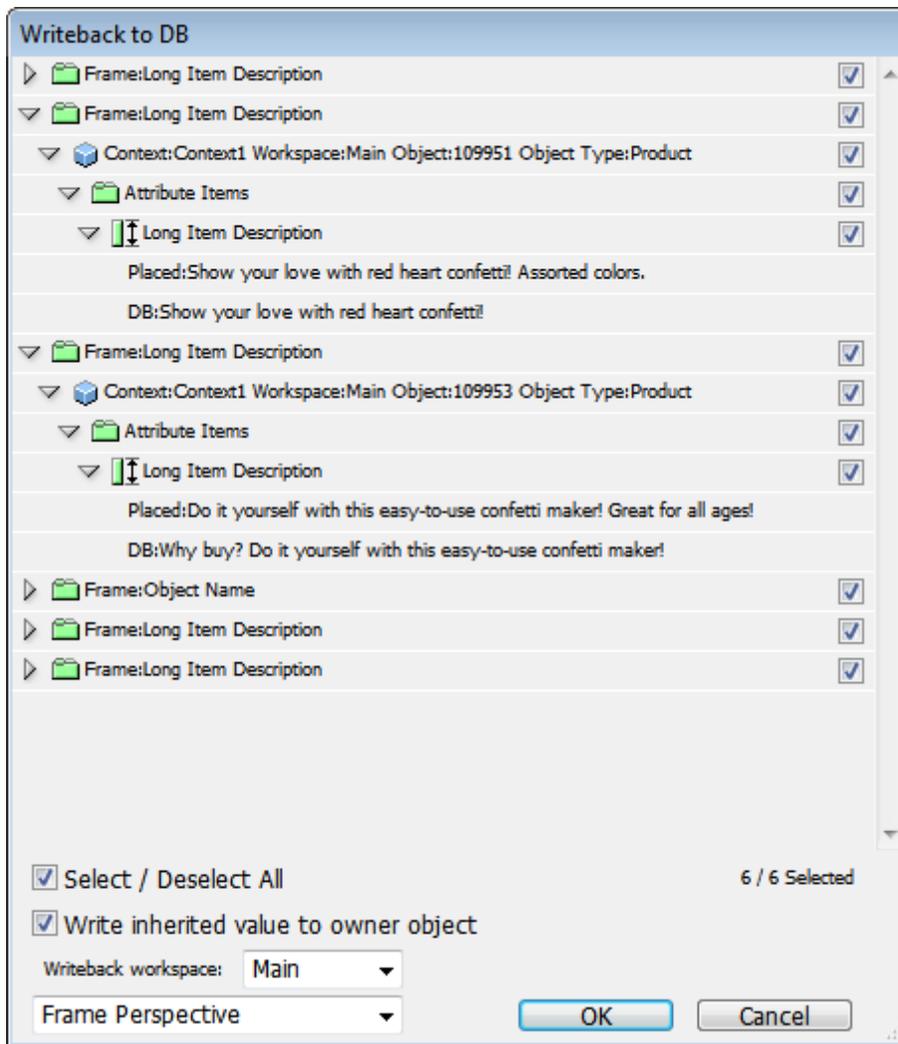
STEP'n'design supports two ways of writing data back from document to database:

- A dialog box that shows all items on the document that could be written back and allows the user to mark the items chosen.
- A direct writeback option, where you select the specific element on the page that you want to write back to the database.

General Data Writeback

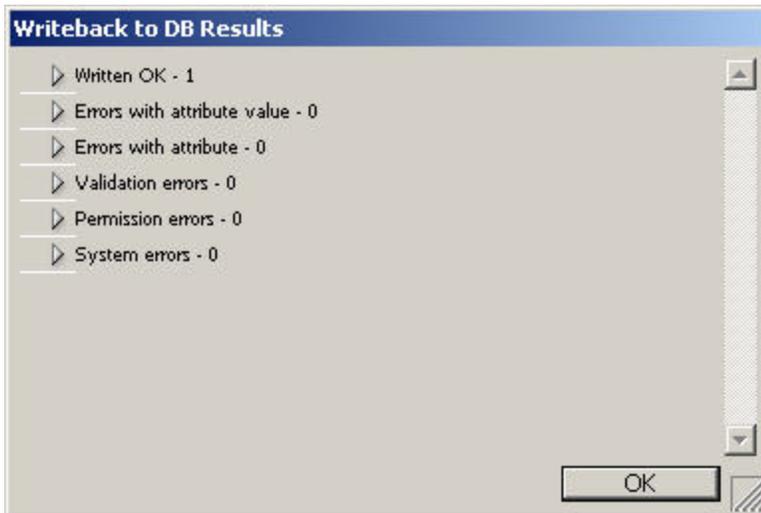
To perform a general STEP PIM database writeback operation after you have changed some attribute text on the InDesign page:

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.
3. Select the relevant check boxes to the right for the data you want to write back to STEP.
4. Select / deselect the **Select / Deselect All** check box if you want to allow selection / deselection of all items within the tree. The check box indicates how many items have been selected, and the total amount of items.
5. 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.
6. 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**.
7. Click **OK**. The contents of your attribute on the InDesign page will now be written back to the STEP database, provided that the STEP database allows it.

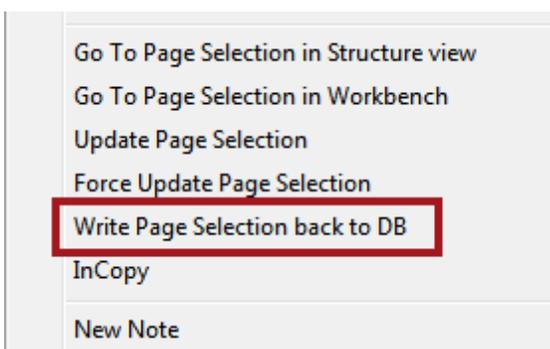
8. A **Writeback to DB Results** dialog box appears. If no errors have been encountered during the writeback process, you may click **OK** to close the window. Users who do not have privileges to make changes in the STEP Workbench, such as changing attribute values, may receive errors in the **Writeback to DB Results** dialog when attempting a data writeback.
9. After the writeback operation has been performed, it will take the STEP Workbench a few seconds to update.



Direct Data Writeback

To perform a direct STEP PIM database writeback operation after you have changed some attribute text on the InDesign page:

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 pop-up menu.

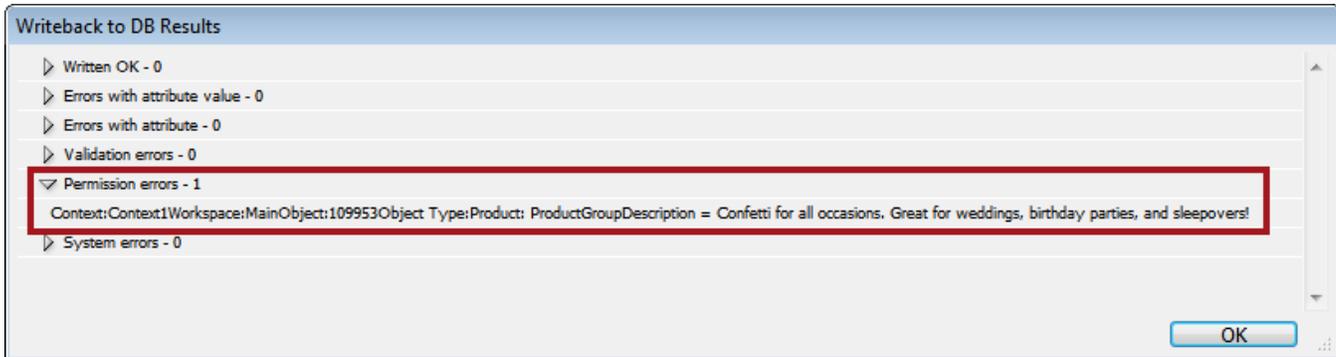


Writeback Errors for Inherited Values

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' here refers to core functionality of STEP'n'design itself, in which no users have the authority to overwrite inherited values from within InDesign.

Updating Documents in InDesign

A key feature in STEP'n'design is the ability to update your already created page(s) with the latest changes from the database. This ability enables you to start building your pages even when product data is not complete or approved yet. Using the update features, you can, at all times, make sure that the contents of your page matches that of the STEP database.

STEP'n'design supports three ways of updating documents:

- 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

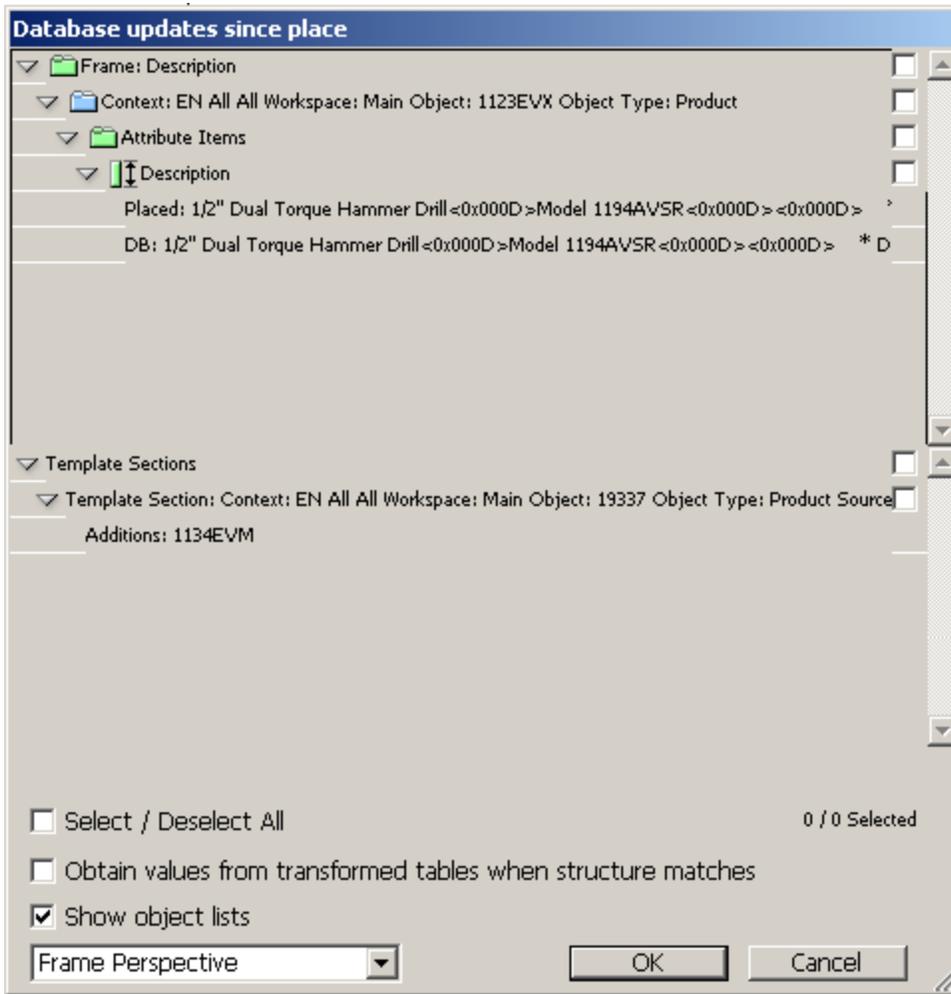
This section describes how to check the content of the document against the corresponding content in STEP and how to update already-created pages with the latest changes from STEP.

Checking Database Update

As you can start building your pages even when product data is not complete or approved yet, it is possible to check the database for updates before saving the documents back to STEP.

1. With the relevant InDesign page opened, click **Check DB Update** from the **STEP** menu.

A **Database updates since place** dialog box appears.



The dialog box lists all the cases, where a newer version of the data exists in the STEP database.

2. Select/deselect the **Select/Deselect All** check box if you want to allow selection/deselection of all items within the tree. The check box indicates how many items have been selected, and the total amount of items.
3. From the list (lower left corner) you can select between **Frame Perspective** and **Object Perspective**, depending on how you want the update-candidates to be shown.
4. Select the **Show Object lists** check box if you want 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.
5. If you want to update the document, select the relevant check boxes (in the right hand-side).

Note: If a table as such is updated, the entire table is re-sent from the database, and all formatting applied on the InDesign page is lost. To prevent this, you can choose to only update the relevant attributes within the table using **Update Document Data** command from the **STEP** menu (see "[Updating by Type](#)" on the next page) or perform a direct data update on the table (see "[Direct Data Update](#)" on page 145).

6. If a table is chosen for update, you can select the **Obtain values from transformed tables when structure matches** check box if you want to retain table structure (e.g. keep current row/column sizes) and only update the values.

If not selecting this check box, then the table is updated to the database value.

7. Click **OK**.

If you selected check boxes, then the document is updated. If not, you are just closing the dialog box after viewing the database update-candidates.

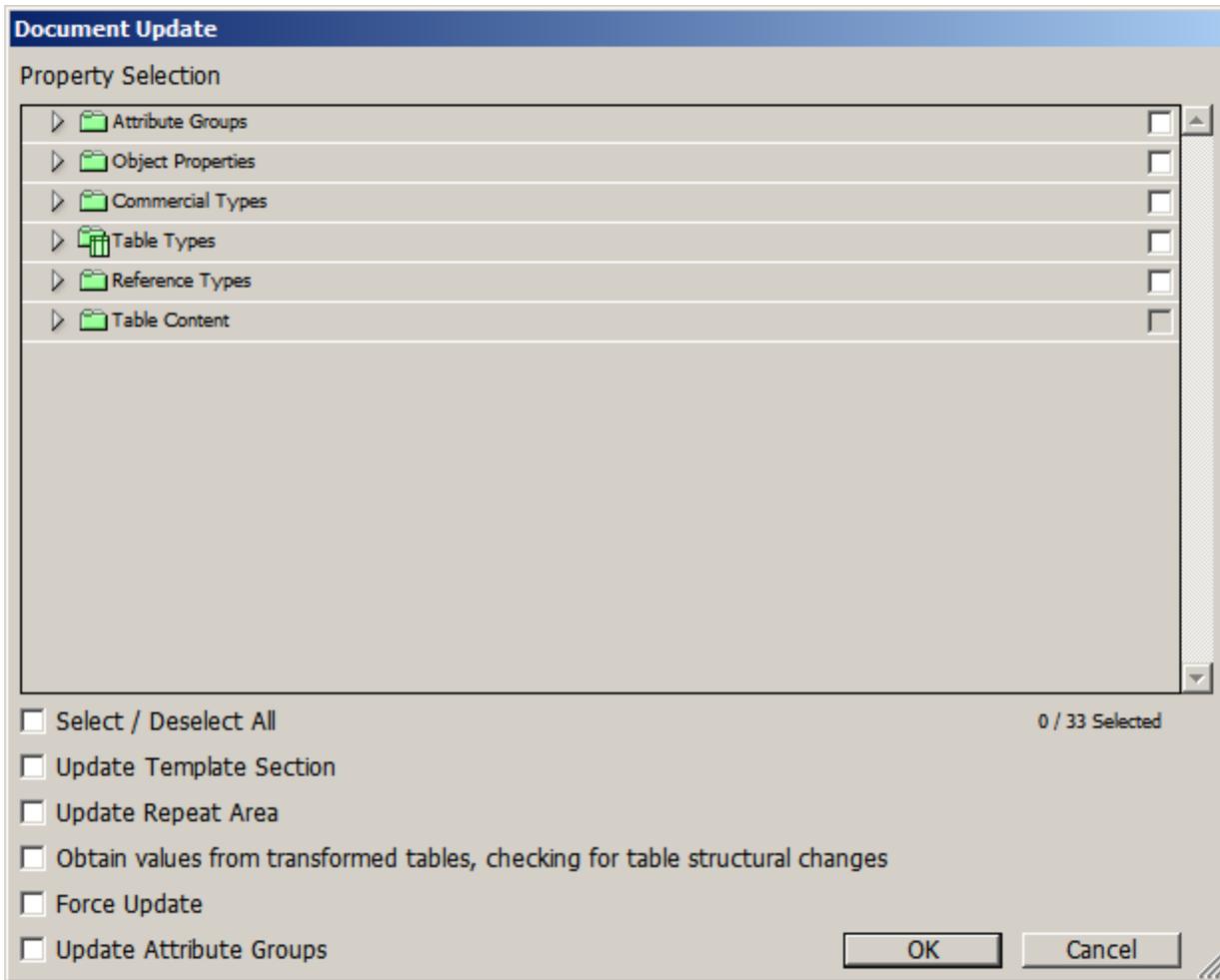
Updating by Type

You can selectively choose which data structure to update, if you know that a certain category of data (such as image references, attributes or tables) have been changed in the database, and you want to have your page updated to reflect those changes. You can update either a small data structure such as one individual attribute, or you can update an entire group of attributes, images and tables. A very typical use of this feature is to do a traditional price merge, where all price attributes must be updated.

To perform an update by type operation after you have changed some attribute text in the STEP PIM database:

1. When having the relevant InDesign page opened, click **Update Document Data** from the **STEP** menu.

A **Document Update** dialog box appears.



2. Select the relevant check boxes (right hand-side) for the elements to be updated.

You can select between groups or individual attributes, object names, table or image type. If checking the highest level, then everything underneath is automatically selected.

If you choose a table type for update, the tables of that update are updated to the database value. Attributes within tables where the type is not chosen are updated according to the attributes selected. In effect, at table can be updated and its format maintained by checking all the top level, except the table types, since that will update every attribute/asset in the table.

Note: If a table type as such is updated, the entire table is resent from the database, and all formatting applied on the InDesign page is lost. To prevent this, you can choose to perform a direct data update on the table. For more information, see "[Direct Data Update](#)" on the next page..

3. Select/deselect the **Select/Deselect All** check box if you want to allow selection/deselection of all items within the tree. The check box indicates how many items have been selected, and the total amount of items.
4. If selecting the **Update Template Section** check box the list of objects applicable to a template section is compared to those 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** check box is selected the template section is removed from the page and replaced with the original gap etc settings - thus the objects will appear in the order of the database.

This will refresh the selected sections with the current data that is in the database.

5. If selecting the **Update Repeat Area** check box the list of objects applicable to a repeat area is compared to those 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** check box is selected the repeat area is removed from the page and replaced with the original gap etc. settings—thus the objects will appear in the order of the database.
6. If a table is chosen for update, you can select the **Obtain values from transformed tables when structure matches** check box if you want to update attribute values by resolving the table and getting the value from the table (e.g. if a selected attribute appears in a mounted table (and the table type is not chosen) and the table structure matches (same #rows, same #cells in each row, same attribute in each cell).

The option is very useful since transformations in a table are applied in a sequence, and the resulting attribute value in a cell therefore be very different from the value entered by the PIM operator.

If not selecting this check box, then the table is updated to the database value.

7. Select the **Force Update** check box if you want to have a value re-sent from the STEP database to the page and overwrite local changes on the InDesign page.

Important: If selecting the **Force Update** check box, then all local changes on the InDesign page are overridden.

If not selected, an attribute is only updated, if the current value is different to the value when it was mounted.

8. Select the **Update Group** check box if you want to have updated the sequence and number of visible attributes within in a referenced Attribute Group.
9. Click **OK**. The document is now updated to match the content in STEP.

Direct Data Update

You can perform a direct data update after you have changed some attribute text or table values in STEP.

Direct Data Update of Attribute Text

To perform a direct data update:

1. Place the cursor within the tag markers of the element on the InDesign page.

If the tag markers (the [and] characters) are not visible, click the **View** menu, point to **Structure**, and then click **Show Tag Markers**.

2. Right-click.

The following options become available.



3. Click either **Update Page Selection** or **Force Update Page Selection**.

- Clicking **Update Page Section**, updates the attribute value if it is different since mounted.
- Clicking **Force Update Page Selection**, forces the attribute value to be updated.

The content is updated on the page, reflecting the data in the database.

Direct Data Update in Tables

To perform a direct data update in a table:

- 1. Right-click anywhere in the table you want to update.

The following options become available.



2. Depending on whether you want to update the whole table (changes in content as well as structural changes), just content changes or just structural changes do the following:

- To update all structural and content changes (styles, transformations, attribute values etc.) in a table, click either **Update Table** or **Force Update Table**.

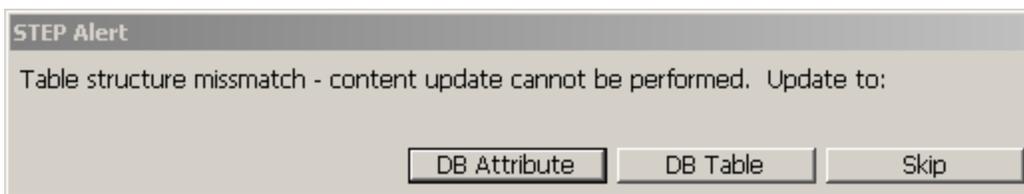
Clicking **Update Table** updates the table if it is different since mounted.

Clicking **Force Update Table** forces the table to be updated.

- To update table content, click **Update Table Content**.

Clicking **Update Table Content** updates every attribute in the table if the table structure matches, and the update only take 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, the content is just being updated.

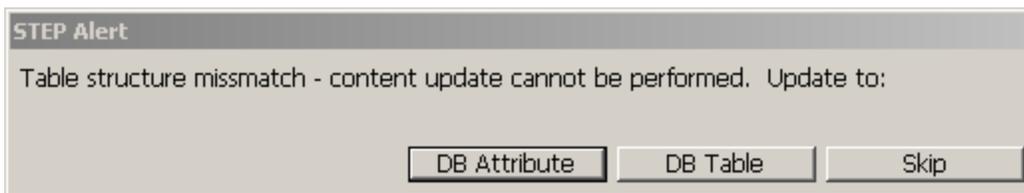


Click **DB Attribute** to update the content of the table. If you want to update the structural changes as well, you must click **DB Table**.

- To force a table content update, click **Force Update Table Content**.

Clicking **Force Update Table Content** forces the table content to be updated with the current values in the STEP database.

If both structural changes and changes to content have been made, then a **STEP Alert** dialog box appears - otherwise, the content is just being updated.



Click **DB Attribute** to force update the content of the table. If you want to force update the structural changes as well, you must click **DB Table**.

Exporting and Importing Publications

Publications may be exported from and imported into STEP by using an Excel format called **Publication Excel**. The Publication Excel format supports all publication types: standard STEP'n'design ('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 and publication 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 also include this functionality, plus remove the need to manually link templates into a new publication exported from one STEP system and imported into another.

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 following sections of this documentation explain the information included in the **Publication Excel** spreadsheet for standard ('drag and drop') and AutoPage publications. For information on the additional information included in the export of **Flatplanner** publications in the Publication Excel format, see these sections of the Flatplanner documentation:

- **Exporting and Importing Flatplanner Publications in Excel**
- **Contents of Flatplanner Publication Excel Exports**

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'n'design ('drag and drop'), Flatplanner, and AutoPage.

The instructions in this section focus on the export process, as 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 three sections; columns A - F, G-M, and N- W. 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										
3					CatalogTheme	Zeta Tools 2016	<Action ID="ProductTemplateAction" Type="ProductTemplateAction"		parameterTemplateID=	
4										
5								107821		
6								108803		
7	1	109032	Toolboxes	Section						
8					SectionTheme	Toolboxes	<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction"			
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						
22					SectionTheme	Garden Tools	<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction"			
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

The following table outlines the contents of a Publication Excel export, in the order that the columns appear.

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
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

Column Header	Description
	publication
LayerMappingTemplate	Name of the layer in the templates (Publication, Product, and InDesign-created Page templates)
LayerMappingDocument	Name of the corresponding layer in the Publication Document (mounting page)
LayerMappingOwner	Displays whether the publication version to which the layer is mapped is the owner of the layer
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)
RuleSettings	Pagination Rules used in the publication(s) and sections Example: <Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parameterTemplateSpreadIndex="1"> <Condition ID="AlwaysCondition" /> </Action>
ProductTemplateID	STEP ID of the product template(s) linked to the exported publication
LinkedObjectID	STEP ID of the product, asset, or classification object linked into the section(s)

Column Header	Description
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 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.

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.

Autopage Publications rev.0.1 - Publication Group	
Publication Group	Status
Description	
Name	Value
ID	108372
Name	Autopage Publications
Object Type	Publication group types
Revision	0.1 Last edited by USER on Fri Sep 25 09:49:37 EDT 2015
Path	Publications/Autopage Publications
Unit	inches
Mail Date (same as Effective)	31

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.

Zeta Tools - 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 1	109027
Name	Zeta Tools
Object Type 2	Publication
Revision	0.4 Last edited by USER4 on Fri Jul 15 13:44:22 EDT 2016
Path	Publications/AutoPage Publications/Zeta Tools
Pages per spread	2
Auto page Document Level	1
Publication template	Zeta Tools Publication Template (110408) 3
Output engine	InDesign
DTP Queue	
Effective Date	<input type="text" value="31"/>
Expiration Date	<input type="text" value="31"/>
Catalog Theme	abc Zeta Tools 4
LastPageNumber	fx 0

Product Templates

Name
TocIndex 5
Main Product Template
Add template

Page Templates

Layer Mappings

Template	Document	Versions
France	France	French FR
Images	Images	English US; French FR; English UK 6
USA	USA	English US
UK	UK	English UK
Create Mapping		

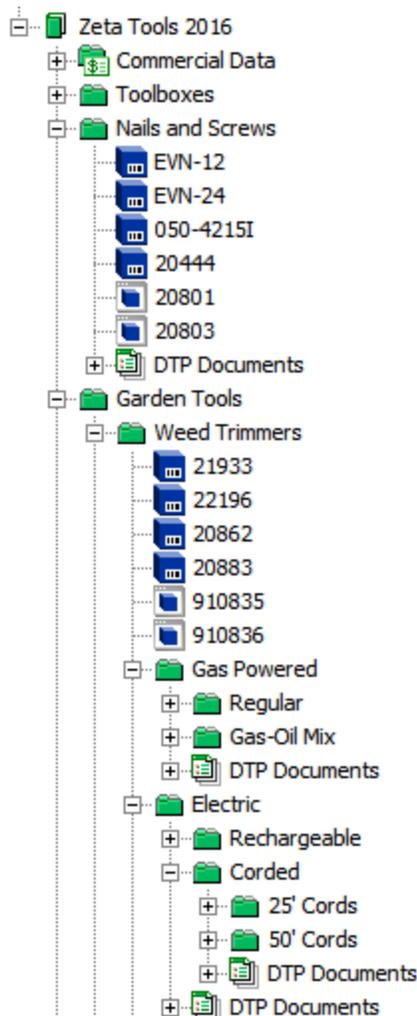
Import Configurations for Commercial Data

Name
Create Import Configuration

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.
- The **LinkedObjectID** column contains the STEP ID(s) of the product and/or asset objects that are linked to each section.
- The **LinkedObjectType** column contains either 'Product' or 'Asset' depending on whether a product object or an asset object is linked to the section. 'Product' and 'Asset' are generic terms, as the exact object types of the products or assets are not necessary for the Publication Excel format.



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').

Zeta Tools - Version					
AutoPage Publication Planner		Pagination Rules		Page Inspector	
Publication		Plan		Version	
Pages		Publication Planner		Plan Notes	
Financial Summary					
Version Description					
ID	Name	Context	Workspace	Price	
127315	English UK	English UK	Main		
127313	English US	English US	Main		
127314	French FR	French FR	Main		
Add version					

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, 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.

Zeta Tools 2016 - Pagination Rules

AutoPage	Publication Planner	Pagination Rules	Page Inspector	Status	State Log	Tasks
Publication	Plan	Version	Pages	Publication Planner	Financial Summary	

Object Layout

Condition	> Action
> Default condition	Use product template Doc-dev prod temp

Add Rule

Position rules

Condition	> Action
> If first in section 1	Place at top of new document

Add Rule

Set publication template spread index

Condition	> Action
> Default condition	Set publication template spread index 1

Add Rule

Using gap

Condition	> Action
> Default condition	Place using gap of 0.55 inches

Add Rule

Add Rule Group

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'n'design ('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 simply 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.

PublicationID	PublicationName	PublicationType	PublicationTemplateID	PublicationInheritedUnit	VersionID	VersionName	VersionContextID	VersionWorkspaceID	LayerMappingTemplate	LayerMappingDocument	LayerMappingOwner
	Zeta Tools	Default publication type	110408	inches		French FR	Context12	Main	France Images	France Images	true
						English US	Context1	Main	USA Images	USA Images	true
						English UK	Context7	Main	UK Images	UK Images	true

SectionLevel	SectionID	SectionName	SectionTypeID	MetaDataAttributeID	MetaDataAttributeValue	RuleSettings	ProductTemplateID	LinkedObjectID	LinkedObjectType
				CatalogTheme	Zeta Tools 2017	<Action ID="ProductTemplateAction" Type="ProductTemplateAction" parameterTemplateID="107821" parameterTemplateTitle="107821 108803			
1		Toolboxes	Section	SectionTheme	Toolboxes	<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parameterTemplateSpre		20881	Product
1		Nails and Screws	Section	SectionTheme	Nails and Screws			7829	Product
1		Garden Tools	Section	SectionTheme	Garden Tools	<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parameterTemplateSpre		3108	Product
2		Weed Trimmers	Section					20674	Product
3		Electric	Section					20682	Product
4		Corded	Section					21933	Product
								20695	Product
								20714	Product

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)

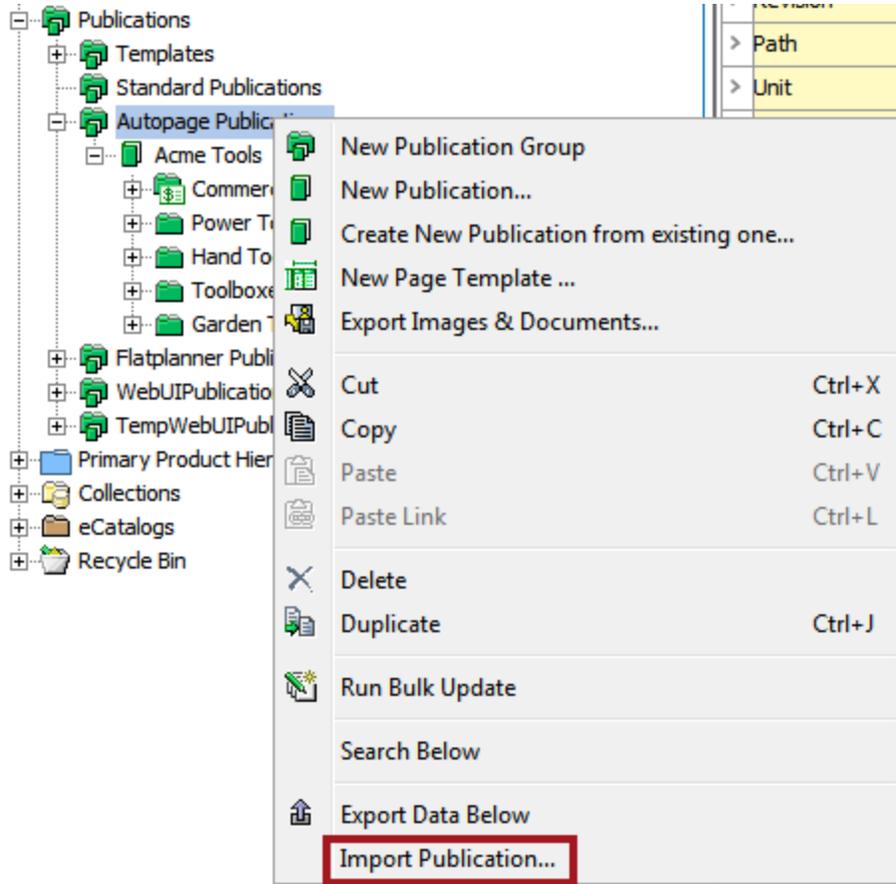
Column Header	Description	Mandatory?
		type is not set to autogenerate)
PublicationName	STEP Name of imported publication	No
PublicationType	Object type ID of imported publication	Yes
PublicationTemplateID	STEP ID of publication template linked to the imported publication	<p>No, but it is strongly recommended to provide this information.</p> <p>If not provided in the import, a publication template must be manually linked to the publication before it can be used for production.</p>
PublicationInheritedUnit	Unit applied to the publication group that contains the publication (mm, inches, points, or picas)	<p>No, but it is strongly recommended to provide this information.</p> <p>If not provided in the import, the unit will default to mm, regardless of what unit is set on the existing publication group.</p>
VersionID	STEP ID of the publication version(s) of the imported publication	<p>No</p> <p>(Yes if the STEP ID of the Publication Version object type is not set to autogenerate)</p>
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

Column Header	Description	Mandatory?
		<p>this information.</p> <p>If not provided in the import, the Version Context ID must be manually added to the publication before it can be used for production.</p>
VersionWorkspacelD	STEP ID of the workspace(s) used in the publication version(s) of the imported publication	<p>No, but it is strongly recommended to provide this information.</p> <p>If not provided in the import, the Version Workspace ID must be manually added to the publication before it can be used for production.</p>
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.)	<p>No</p> <p>(Yes if you do not want all sections to import as top-level sections)</p>
SectionID	STEP ID of the imported publication section(s)	<p>No</p> <p>(Yes if the STEP ID of the section object type is not set to autogenerate)</p>

Column Header	Description	Mandatory?
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) attributes linked to the publication or section	No
MetaDataAttributeValue	Value of metadata (description) attributes linked to the publication or section	No
RuleSettings	<p>Pagination Rules used in the publication(s) and sections</p> <p>Example: <Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parameterTemplateSpreadIndex="1"> <Condition ID="AlwaysCondition" /> </Action></p>	No
ProductTemplateID	STEP ID of the product template(s) linked to the imported publication	<p>No, but it is strongly recommended to provide this information.</p> <p>If not provided in the import, a product template must be manually linked to the publication before it can be used for production.</p>
LinkedObjectID	STEP ID of the product, asset, or classification object linked into the section(s)	No
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.	<p>No</p> <p>(Yes if you have provided a LinkedObjectID, as the possibility exists that a product object and asset object could share the same STEP ID)</p>

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)

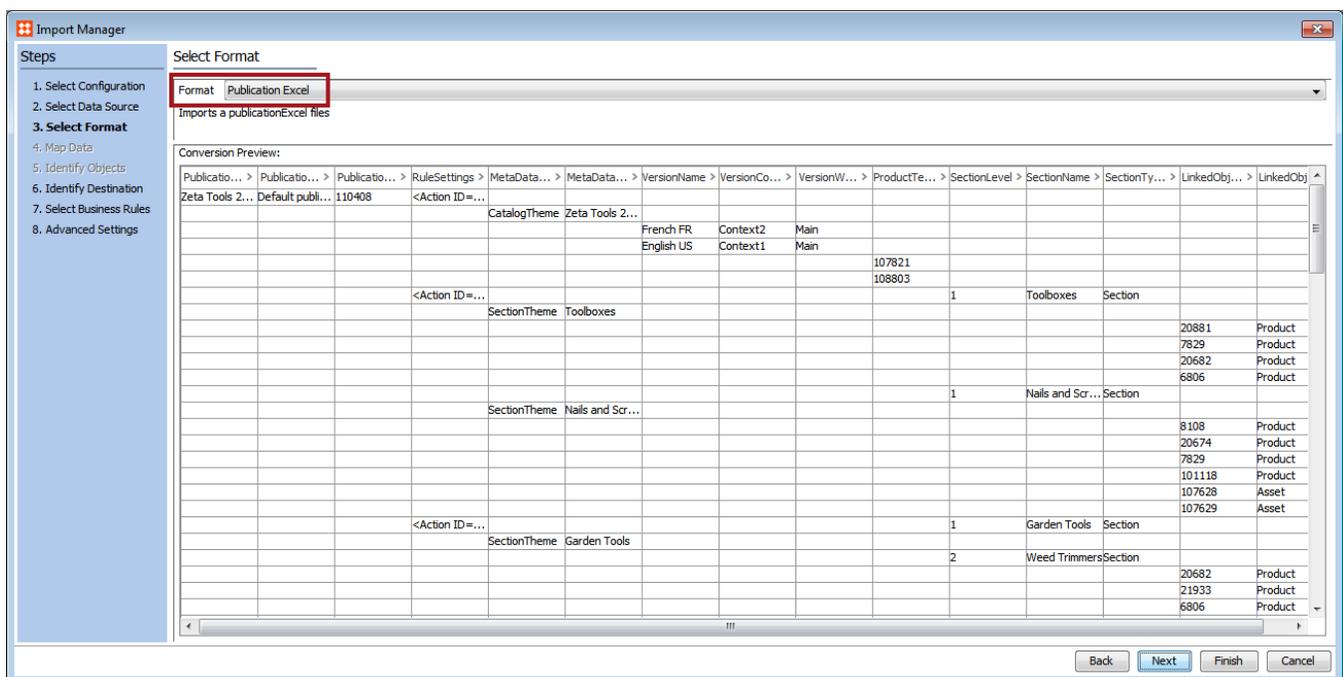
Importing Publication Excel Files in the Import Manager (File > Import > Data)

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

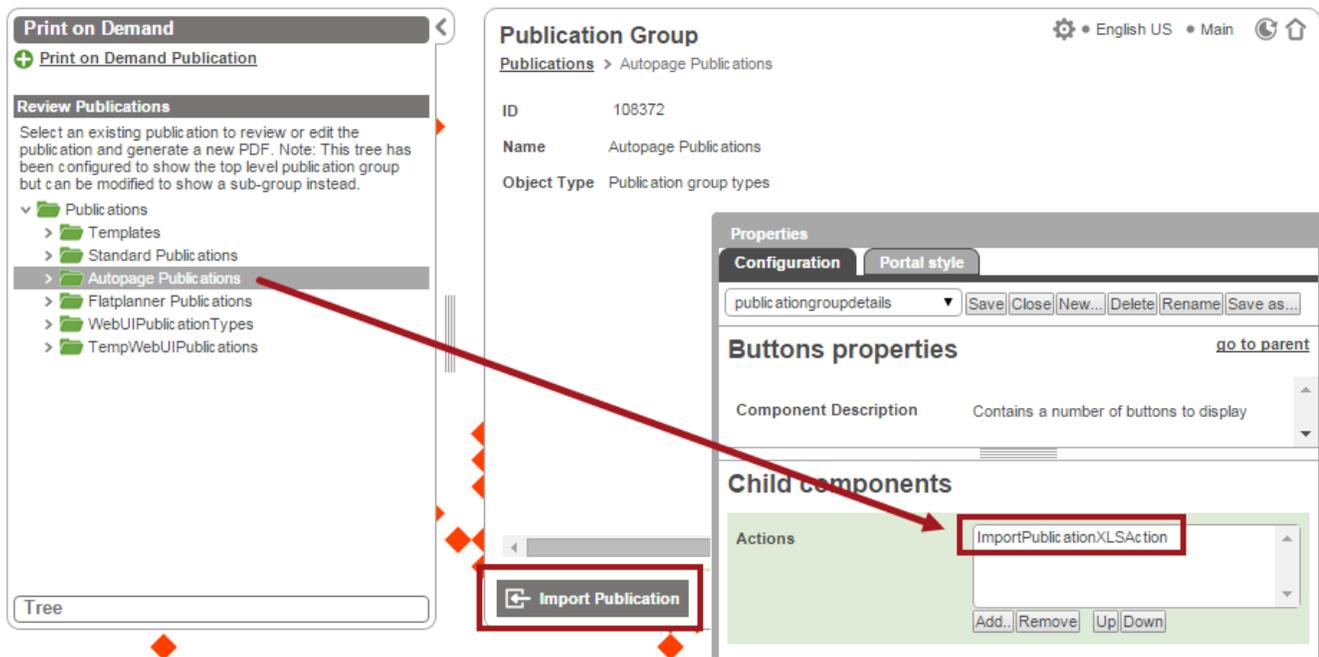
Publication Excel files may also be uploaded via hotfolders, which are configured through Inbound Integration Endpoints (IIEPs). Configuring an IIEP for Publication Excel imports is similar to configuring a Publication Excel import using the standard Import Manager.

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 Inbound Integration Endpoints** in the **Integration Endpoints** 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.



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 on STEPXML imports, see **STEPXML Format** in the **STEP Import Manager** documentation.
- Import of layer mapping information is not currently available in either the Publication Excel or the STEPXML format.

For More Information

For information on Publication Excel exports, see the **Exporting Publications in Excel** section of the **STEP'n'design** documentation.

For more information on the export and import of Flatplanner publications in Excel, see **Exporting and Importing Flatplanner Publications in Excel** in the **Flatplanner** documentation.

For more detailed information on Import Manager functionality and the Import Manager wizard, see **Data Import Manager Wizard** in the **Import Manager** documentation.

For information on the Publishing Web UI, See **STEP Publishing Web UI** in the **Web User Interfaces** documentation.

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 / STEP 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'n'design** 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 keeps 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= Rep
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 **Exporting in Excel or CSV Format** section of the **Exporting Data and Images** documentation for more information.

5. 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							
18		1	177999	Nails and Screws	Section		

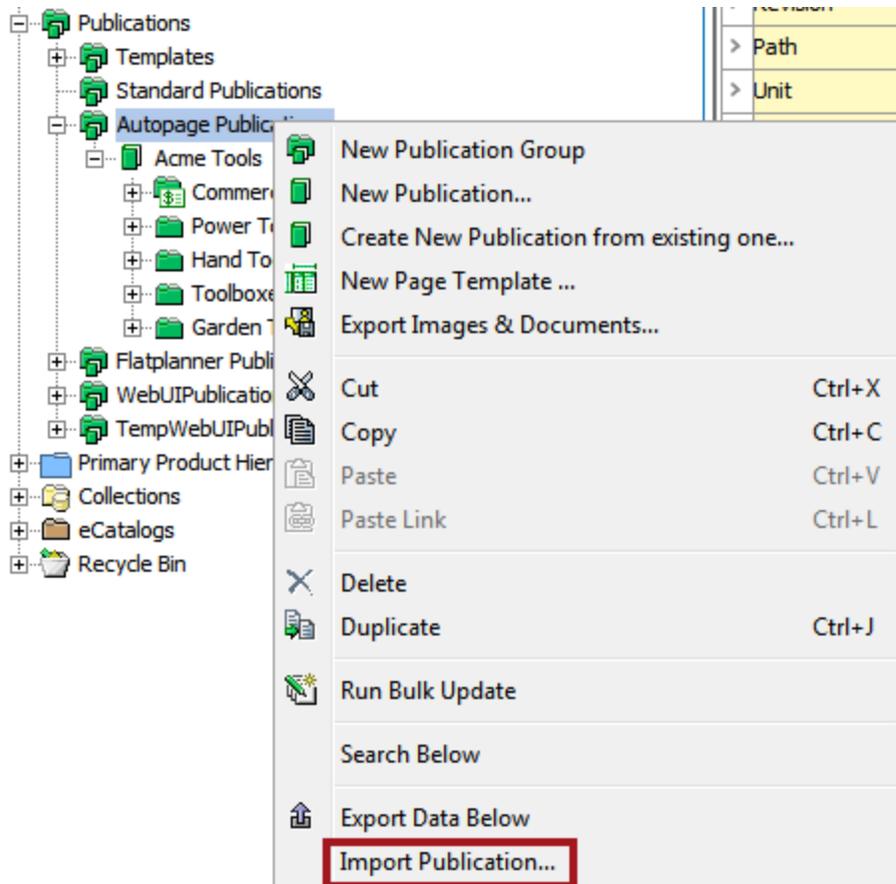
Product
Asset
Classification

6. 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** section of the **STEP'n'design** documentation.

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 another STEP system in a single operation. These Transfer Packages contain the following items:

- Publication Excel spreadsheet
- Publication STEPXML file

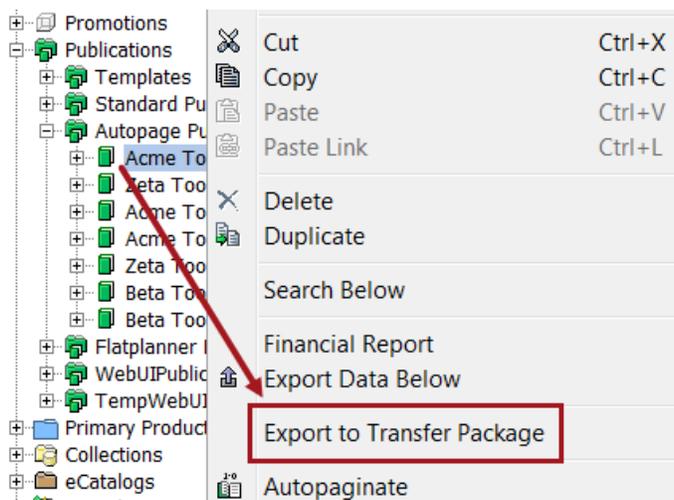
- Publication templates
- Product templates
- Page templates *(for Flatplanner publications only)*
- XML mapping files that link the STEP names of all templates to STEP IDs
- Export configuration property file

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.

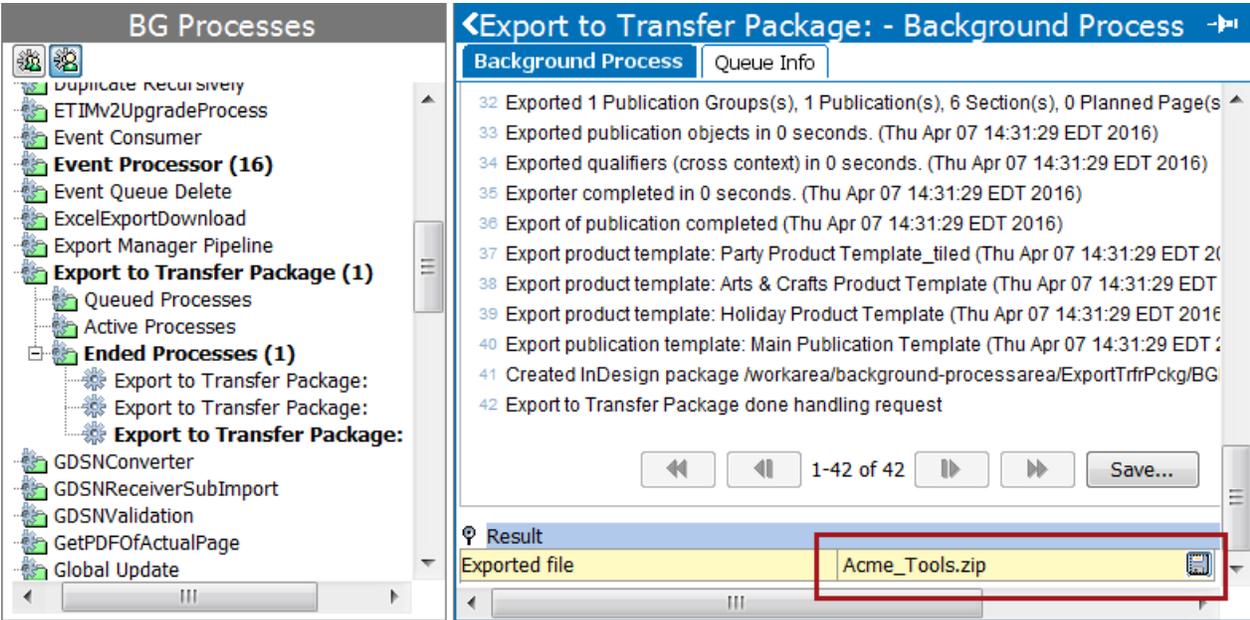
Exporting a Publication Transfer Package

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 another STEP system. However, the folders contained in the .ZIP file are as follows:

Name	Type
pageTemplates	File folder
productTemplates	File folder
publication	File folder
publicationTemplate	File folder

- pageTemplates:** Contains all **page templates** associated with the publication plus 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.

Name	Type
3x31.generic	GENERIC File
3x32.generic	GENERIC File
4x41.generic	GENERIC File
4x42.generic	GENERIC File
Doc-dev page temp1.generic	GENERIC File
Doc-dev page temp2.generic	GENERIC File
TemplateNameIDMapping.xml	XML File

- **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.

Name	Type
 Arts & Crafts Product Template.indd	InDesign Document
 Holiday Product Template.indd	InDesign Document
 Party Product Template_tiled.indd	InDesign Document
 TemplateNameIDMapping.xml	XML File

- **publication:** Contains a **Publication Excel** sheet, a publication export **STEPXML** file (PUBLICATION_EXPORTED.xml), and an export configuration file (ExportConfiguration.tmp).

Name	Type
 ExportConfiguration.tmp	TMP File
 exported.xls	Microsoft Excel 97-2003 ...
 PUBLICATION_EXPORTED.xml	XML File

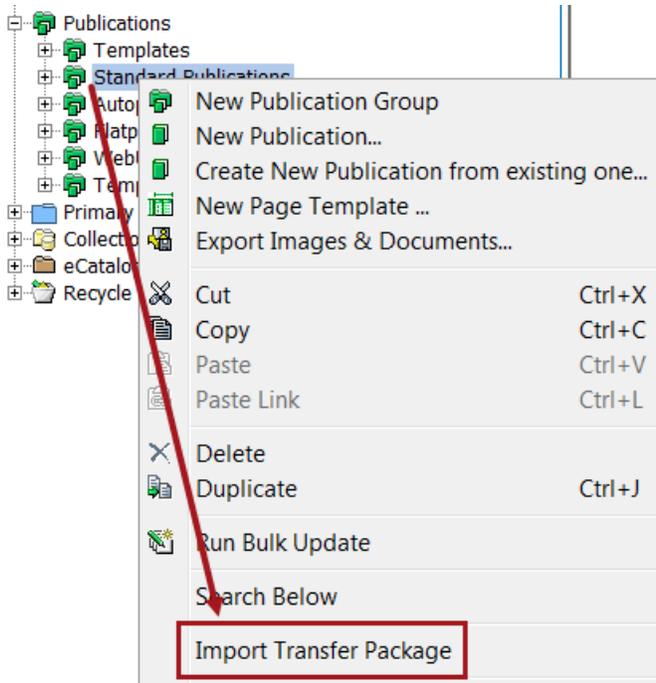
- **publicationTemplate:** Contains the **publication template** associated with the publication plus an XML file (TemplateNameIDMapping.xml) that maps the file name of the template to its corresponding STEP ID.

Name	Type
 Main Publication Template.indd	InDesign Document
 TemplateNameIDMapping.xml	XML File

Importing a Publication Transfer Package

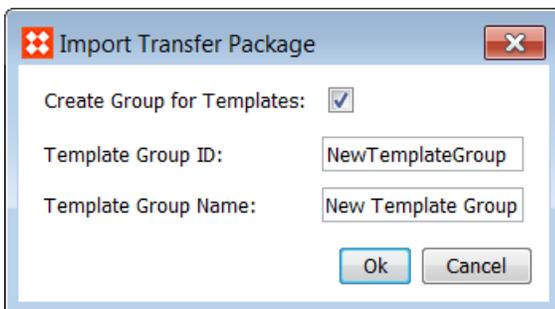
To import a publication Transfer Package, follow these steps:

1. In the **Tree**, navigate to the **publication group** into which you would like to import the publication 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.

For More Information

For more information on exporting and importing publications in the **Publication Excel** format, see the following topics:

- Standard ('drag and drop') and AutoPage publications: **Exporting and Importing Publications in Excel**
- Flatplanner publications: **Exporting and Importing Flatplanner Publications in Excel**

Linking to an Asset Location

This topic describes a common setup for users of STEP'n'design 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.

The screenshot shows the 'Preferences' dialog box for STEP. The 'Asset Location' field is highlighted with a red box and contains the text 'I:\'. Other fields include 'Process Folder' (C:\Users\abcd\step-dtp\indesign\), 'Template Path' (C:\Users\abcd\Documents\Templates), 'Template Cache size' (0), 'Server presentation' (None), 'Note Layer' (Notes), 'Note Colour' (dropdown), 'SOAP Timeout' (900), and 'cURL Timeout' (900). The 'OK' button is highlighted in blue.

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'n'design. See the next topic in this documentation, **Relinking Assets in STEP'n'design**, 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 information on Asset Push, see the **Asset Push Overview** section of the **Exporting Data and Images / STEP Asset Push User Guide** 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'n'design 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'n'design 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:

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

```

dtp-server.properties - Notepad
File Edit Format View Help
#This file contains the configuration needed locally on this dtp server
#Fri Dec 04 04:19:25 PST 2015
ServerDir=C:\Program Files\Adobe\Adobe InDesign CS6 Server x64
#BackgroundRoot=Set this to shared background process directory
#AdobeSerializationDir=optional. Set this to the directory that contains the Adobe
#serialization tool (AdobeSerialization or adobe_prtk)
AssetPushRoot=E:\step\assetpush\images
#AdobeSerializationProvFile=optional. Absolute Path to the prov.xml file. This contains
the provisioning information needed when serializing.
  
```

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

Description	
Name	Value
ID	110051
Name	Streamers - Blue & Orange
Object Type	Product Image
Revision	1.1 Last edited by USER on Fri Oct 16 ...
Approved	✓ Approved on Fri Oct 16 09:37:30 E...

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.'

raw-approved - Asset Push Configuration	
Name	Value
ID	raw-approved
Name	raw-approved
Notification Email	
Workspace	Approved
Image Conversion	<source>
Relative Path Template	\$configID\$/contentdimensionpointsID\$/IDpath\$/assetID\$.autodetected-extension\$
Auto Cleanup	true
Include Classification	Icons, Illustrations, Logos, Product Images
	image/*

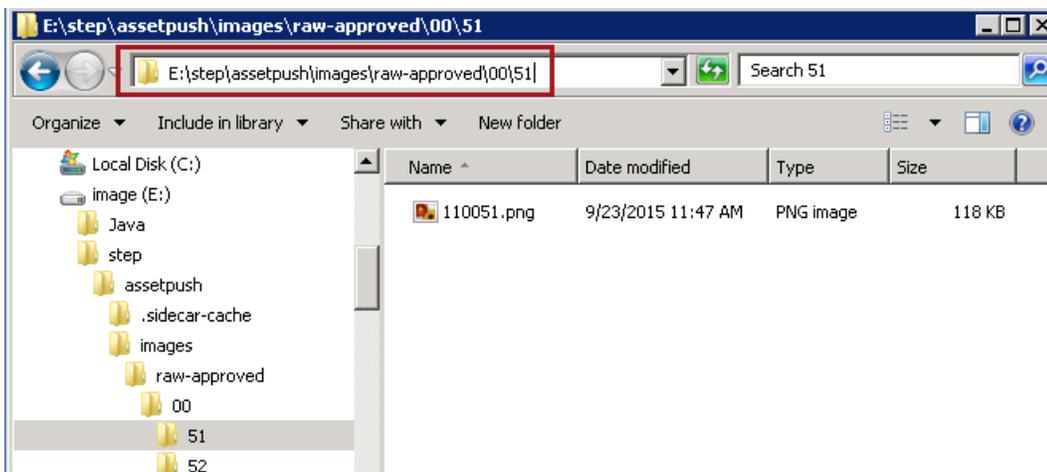
Configuration entries in the sharedconfig.properties file point the InDesign server to the appropriate queue. AssetPush.DTPConfiguration is the default queue to use when the workspace is Main, and AssetPush.DTPConfiguration.Approved is the default queue to use when the workspace is Approved.

```
#=====#
# AssetPush event queue configuration. Must always be configured!
#=====#
EnableAssetPushQueue = yes
AssetPush.UseSystem = new
AssetPush.DTPConfiguration = raw-main
AssetPush.DTPConfiguration.Approved = raw-approved
#AssetPush.LegalChars = -$_-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.)

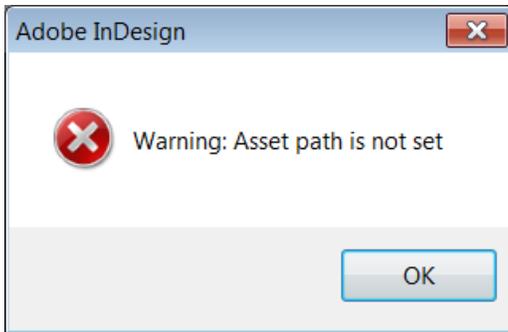
Streamers - Blue & Orange rev.1.1 - Status				
Images & Documents References Referenced By Status State Log Tasks				
Asset Push Status				
Configuration	Asset Push Status	Relative Path	Workspace	Visibility
> raw-main	✓ Up to date	raw-main/00/51/110051.png	Main	Language R...
> raw-approved	✓ Downloaded	raw-approved/00/51/110051.png	Approved	Language Root

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.

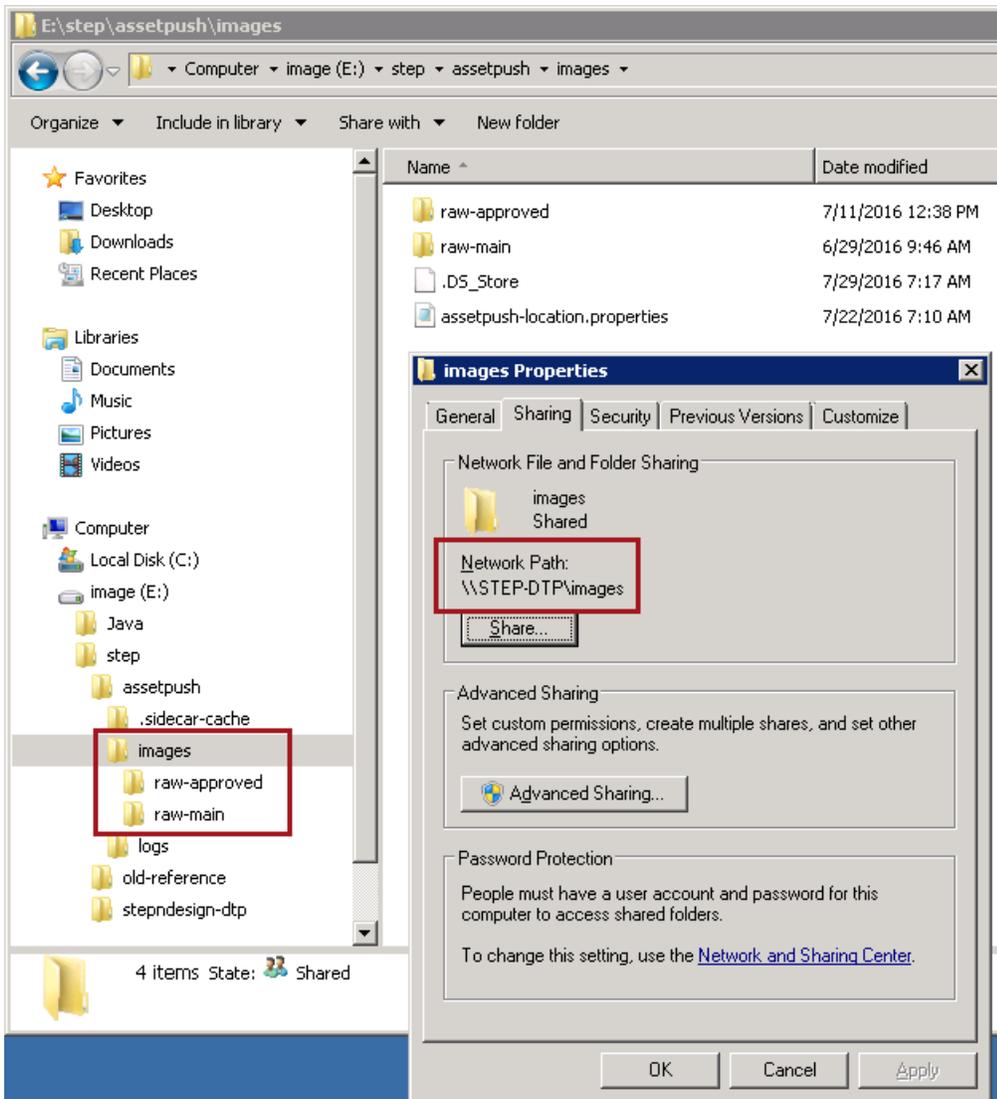
Instructions for Mac users are nearly identical to those for Windows except for Mac file path formats and specifics of how to share folders on a Mac operating system.

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.

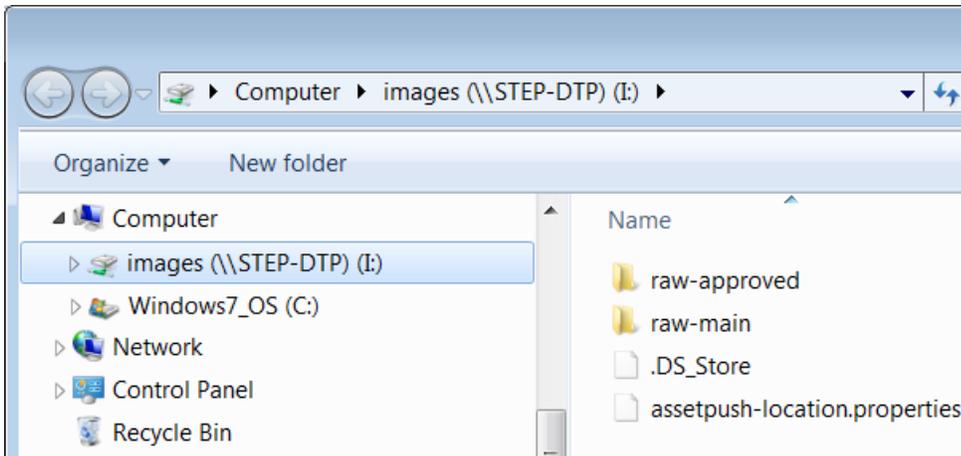
The following screenshot shows a sample 'images' folder hierarchy containing images that have been pushed from the main and approved workspaces in STEP (raw-main and raw-approved, respectively). To determine the correct path to enter into the **Asset Location** field in the STEP Preferences menu:

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.



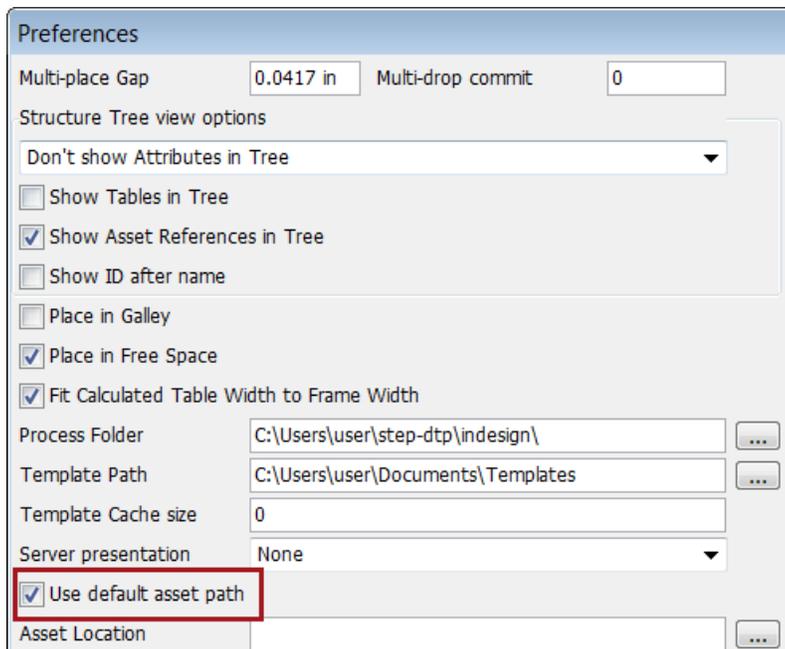
Default Asset Path

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.

Relinking Assets in STEP'n'design

Two functions exist within STEP'n'design 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).

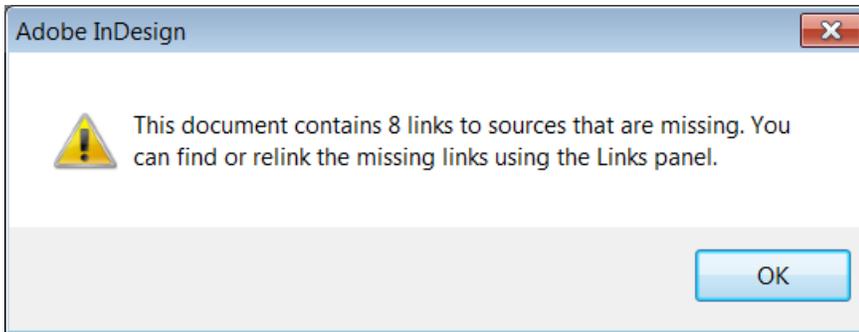
Although the standard InDesign function of relinking assets may be done via the **Links** panel, that method can be cumbersome because it requires users to manually search for or navigate to image locations. If links are broken on hundreds upon hundreds of pages, relinking assets by this method could 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.

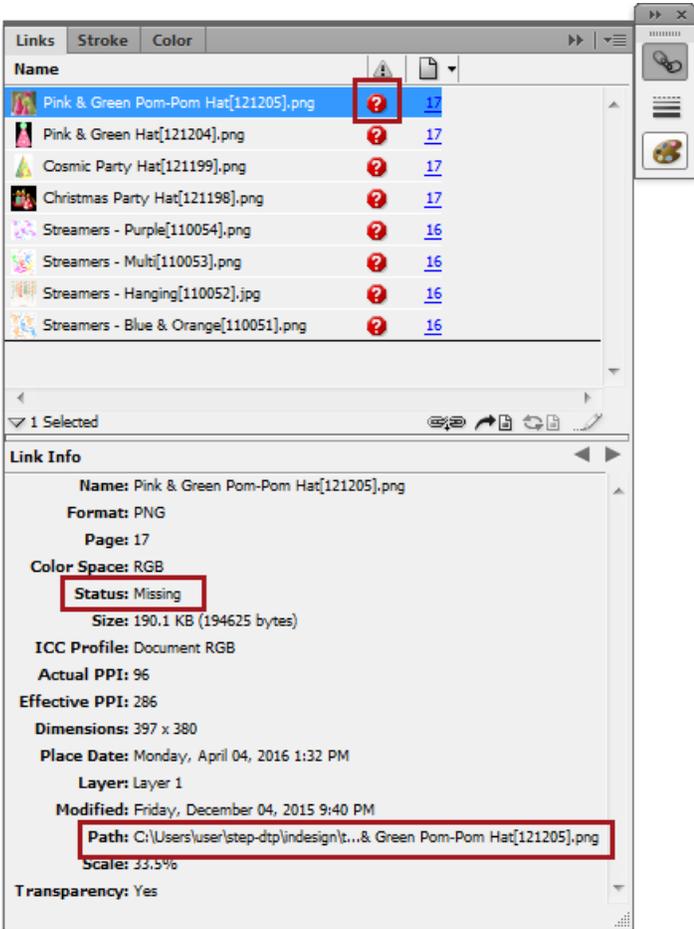
When opening a document in InDesign that contains unlinked images, the following warning dialog displays:



Unlinked images display a red question mark to indicate that InDesign can no longer locate the original image:



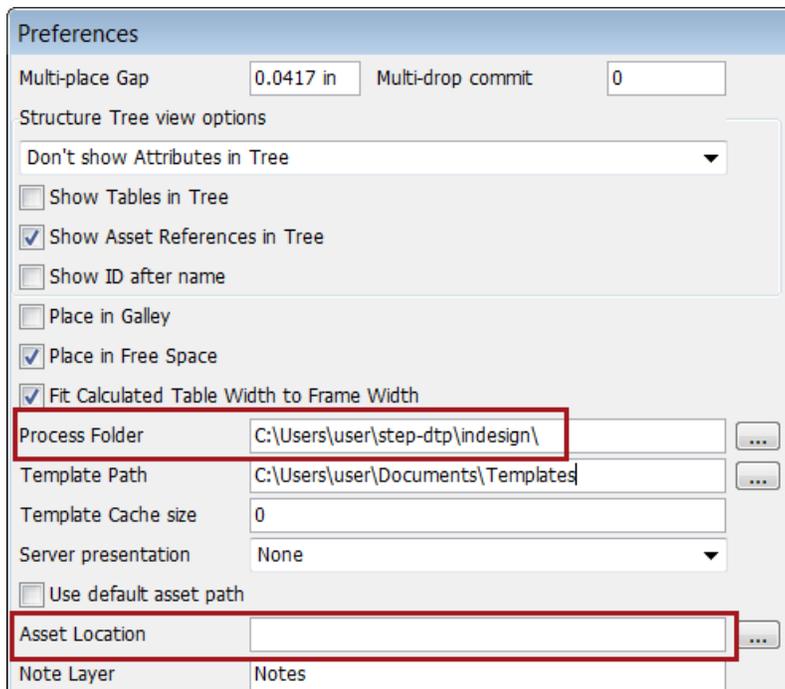
The **Links** panel displays the same red question mark for missing image links and a **Status** of 'Missing.' The displayed **Path** indicates where InDesign is expecting to find the image. This location is where the current user must be connected in order for InDesign to find the image.



Common Causes of Broken Links for STEP'n'design Users

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 here, 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.

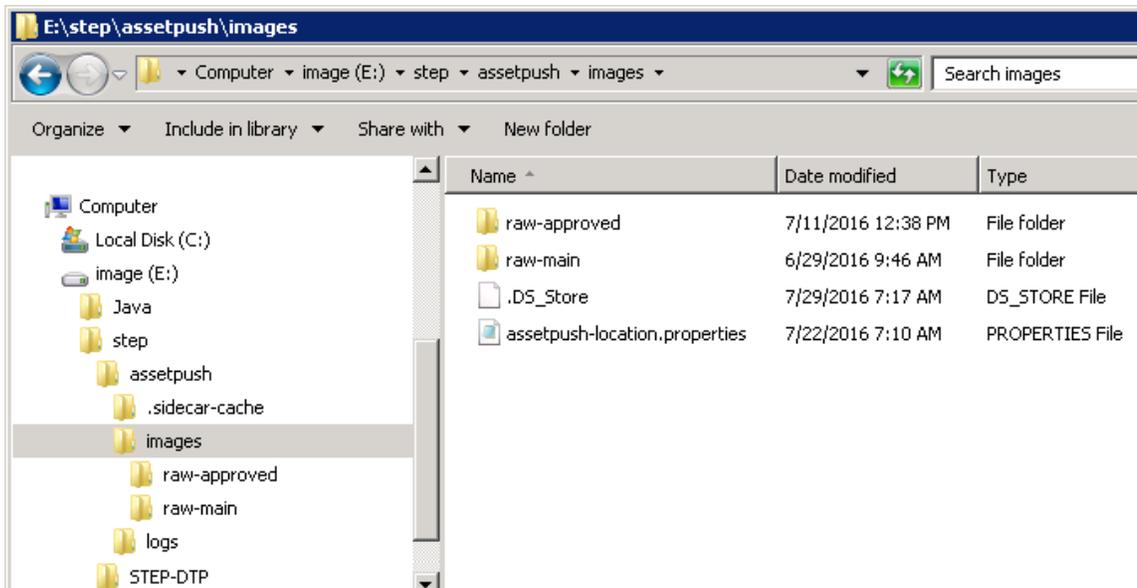


For information on how to determine what file path to place into the Asset Location field, see the **Linking to an Asset Location** documentation.

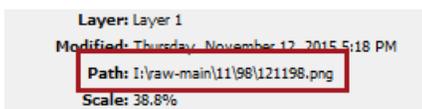
Changes to How the Shared Image Drive is Connected

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 same STEP'n'design 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.

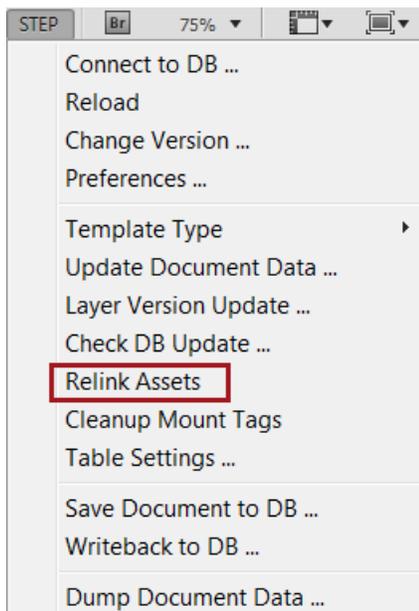
Correcting Broken Links

Relinking Assets from InDesign

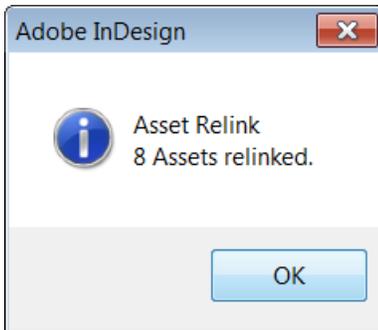
Missing assets can be relinked from within InDesign by using the **Relink Assets** function. (An InDesign server is not required to perform this action.) Provided that the Asset Location is set correctly and connection to the shared drive (asset push images folder) is established, STEP'n'design will 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:

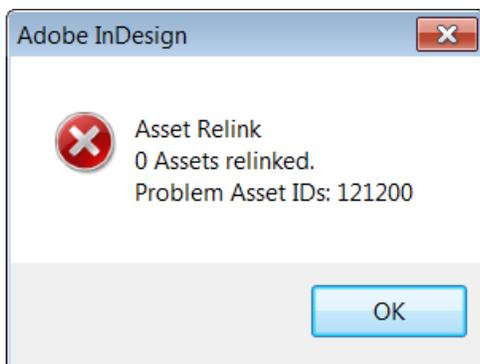
1. In InDesign, open the **STEP** menu and select **Relink Assets**.



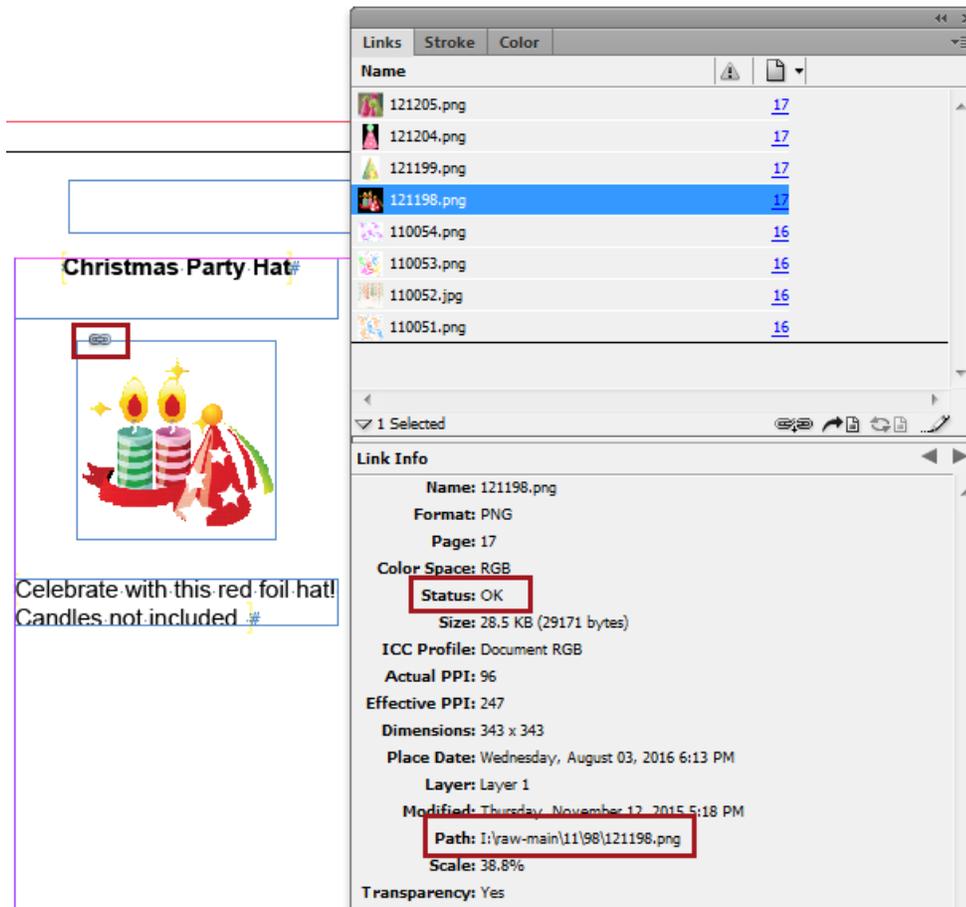
- STEP automatically searches in the specified asset location and matches the IDs of the images in the document to those of the images in the asset location.
- Once the relink is complete, an Adobe InDesign dialog appears that displays the number of assets that were relinked.



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.



- 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.

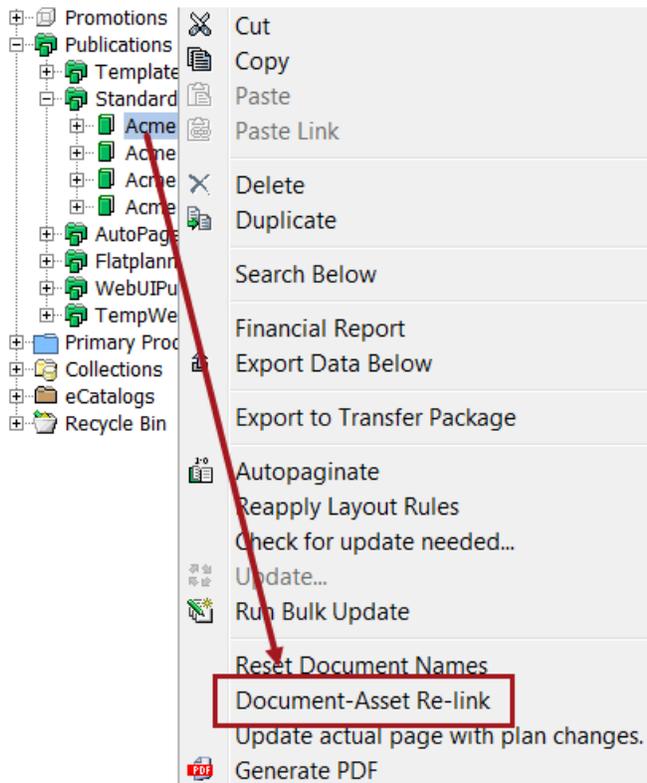
Document Asset Re-link enables a one-click relinking of assets throughout an entire publication or section. As mentioned in previous sections of this topic, image links can break on mounted pages when saved back to STEP from Mac clients but are opened by an InDesign server that is running on a Windows 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.

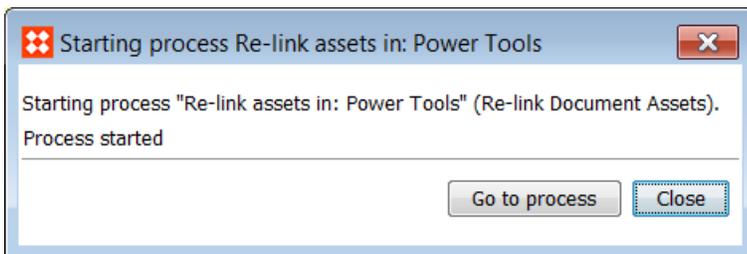
As long as the **dtp-server.properties** file has the AssetPushRoot parameter set correctly and a connection to the shared drive is established, the InDesign server will be able to open the InDesign documents that are in STEP, locate the images, and change the path in the documents so that all images 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.

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 smaller tasks are handled before larger tasks so users do not have to wait for a large job to finish before starting another. In addition, multiple queues can be created to handle multiple versions of InDesign.

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 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.
2. 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).
3. You may need to create a queue with no InDesign server renderers. This queue could be called, for example, 'Frozen.' Once a publication is finished it could be set to use the 'Frozen' queue, meaning that STEP users cannot make any further updates / changes to the documents via workbench actions. (Note that this does not prevent an InDesign user from opening and saving the document.)

Setting up the InDesign Queue

InDesign queues in STEP are created under System Setup > **InDesign Queue**.

DTP Queue Definition					
				10.64.205.155 cs6	
	Reserved for Foreground		9090	9091	
Online?			✓	✓	
Default Queue (cs6*)		0	✓	✓	
Default Queue (CC)		0			
			Manage the queues		

DTP Queue: Default Queue (cs6*)					
User	Renderer	Description	Background ...	Start Time	Progress

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, 9090), and the version of InDesign they are running (for example, CS6).

Default queues are created automatically for any InDesign server renderers that are not assigned to a user-defined queue. Multiple default queues are created so that one queue does not contain multiple InDesign versions. Multiple InDesign versions in a queue could cause problems if, for example, a document is created on a user's local InDesign client with CC but is then sent to an InDesign server running CS6, in which case the document

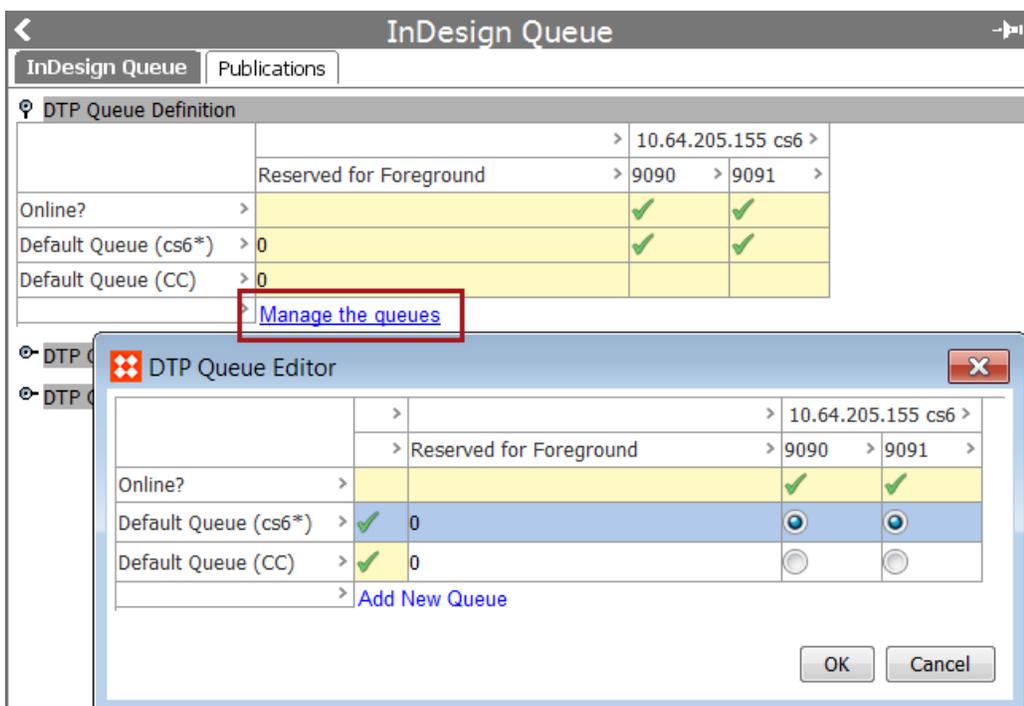
cannot be opened. A default queue with an asterisk (*) after the InDesign version is the queue used when a specific queue has not been assigned to the publication.

There is no limit to the number of InDesign queues that can be created, but each InDesign server instance may only be allocated to one queue. In other words, there is a 1-to-1 relationship between InDesign server and InDesign queue.

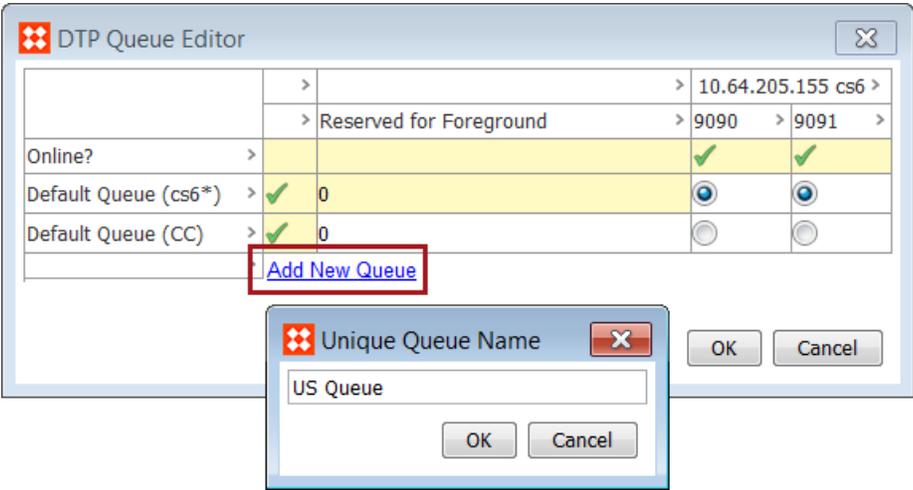
Note: The initial connection of InDesign servers to your STEP system must be performed by Stibo Systems. However, once the servers are connected, end users may create InDesign queues to prioritize the order in which pagination and proof view jobs are sent to these servers.

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**.

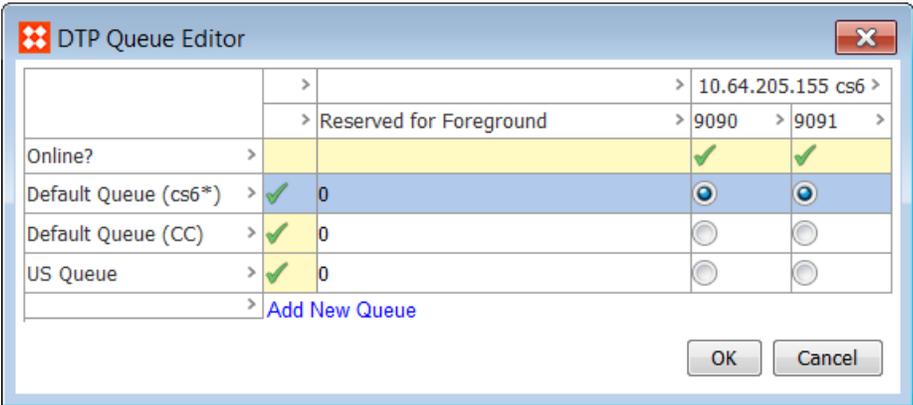


3. In the DTP Queue Editor dialog, click 'Add New Queue.'
4. In the Unique Queue Name dialog, enter a name for the queue, then click **OK**.



5. In the **Reserved for Foreground** column, enter a zero (0) for the queue(s) that should handle foreground tasks, which are typically smaller jobs such as product proofs and page previews. Enter higher numbers for queues that should handle background jobs, such as autopagination of large publications.

By default, all new queues are set to 0. Leaving all queues at 0 means that a foreground task (a smaller job) may have to wait until a renderer has finished processing a larger job before it can complete.



6. 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.

The screenshot shows the 'InDesign Queue' window with tabs for 'InDesign Queue' and 'Publications'. It displays 'DTP Queue Definition' for 'Default Queue (cs6*)' and 'Default Queue (CC)'. A table below shows active jobs for the 'Default Queue (cs6*)' with columns for User, Renderer, Description, Background Process, Start Time, and Progress. A red box highlights the 'Background Process' column for the job 'Paginate Zeta To...'. Below this, another table shows the 'DTP Queue: Default Queue (CC)' with similar columns.

DTP Queue Definition					
		>	10.64.205.155 cs6 >		
	Reserved for Foreground	>	9090 > 9091 >		
Online?	>		✓	✓	
Default Queue (cs6*)	>	0	✓	✓	
Default Queue (CC)	>	0			
	>	Manage the queues			

DTP Queue: Default Queue (cs6*)					
User	Renderer	Description	Background Process	Start Time	Progress
> user	10.64.205.155:9090	Paginating page 18	Paginate Zeta To... 	Thu Apr 21 11:26:29 ...	53%

DTP Queue: Default Queue (CC)					
User	Renderer	Description	Background Process	Start Time	Progress
>	>	>	>	>	>

Assigning a Queue to a Publication

Publications can be set to use a particular queue via the **DTP Queue** list, which is located on the **Publication** tab. If only one queue exists, or if no queue is specified on the publication, the default queue indicated by an asterisk (*) after the InDesign version will be used.

The screenshot shows the 'Publication' tab in the InDesign Queue editor. It displays a list of publication properties such as ID, Name, Object Type, Revision, Path, Pages per spread, Auto page Document, Publication template, Output engine, and DTP Queue. A red box highlights the 'DTP Queue' dropdown menu, which is currently set to 'Default Queue (CC)'.

Publication		Plan	Version	Pages	Publication Planner	Plan Notes
Description						
Name	>	>	Value >			
ID	>	109027				
Name	>	Zeta Tools 2016				
Object Type	>	Publication				
Revision	>	0.3 Last edited by USER on Wed Apr 20 17:50:39 EDT 2016				
Path	>	Publications/Autopage Publications/Zeta Tools 2016				
Pages per spread	>	2				
Auto page Document ...	>	1				
Publication template	>	Zeta Tools Publication Template (110408) ...				
Output engine	>	InDesign				
DTP Queue	>	Default Queue (CC) ▼				

The publications assigned to each queue are displayed on the **Publications** tab in the InDesign Queue editor:

System Setup

- Attribute Groups
- Attribute Transformations
- Action Sets
- Contexts
- InDesign Queue**
- Lists of Values / LOVs
- Change Packages
- Completeness Metrics
- Event Processors
- Gateway Endpoint
- GDSN WF and BR
- Global Business Rules
- Inbound Integration Endpoints
- Match Codes and Matching Algorithm
- Outbound Integration Endpoints

Publications

InDesign Queue | Publications

Default Queue (cs6*)

ID
> 107826
> 108199
> 108288
> 108321
> 108339

Default Queue (CC)

ID
> 109027