FLATPLANNER

USER GUIDE

StiboSystems

STEP Trailblazer 8.1

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Introduction

About This Guide

The STEP Flatplanner User Guide contains information about STEP Flatplanner.

The guide assumes the following.

- That users have a working knowledge of STEP Information Server
- That users have a working knowledge of InDesign.
- That publications have already been created in STEP Information Server.
- That product templates and a publication template have been created in InDesign and assigned to the STEP Information Server database.

The guide only contains information about the STEP Flatplanner. For more information about STEP Information Server and publication creation, see the STEP User Guide and the Online Help.

For more information about DTP integration, see the STEP Publisher User Guide.

About STEP Flatplanner

STEP Flatplanner helps you make more educated product choices and produce 'Intelligent Catalogs' that will improve your company's sales. The visual page briefing tools replace 'lick and sticker' paper briefing.

Flatplanner includes tools that enable advanced collaboration, automation, and analysis, and make your product selection easier and more efficient.

In addition, Flatplanner provides a single interface for business users to plan, review, and analyze publications. Creative users can access the publication plan through STEP'n'design for InDesign. Merchandisers can review and approve artwork at any time through STEP Flatplanner.

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

Flatplanner License Requirements

To be able to use the Flatplanner component, the following components are required in addition to the STEP Information Server:

- STEP Publisher component
- STEP Flatplanner component

Other licenses may be required for specific features.

Overview of the Flatplanner User Interface

The Flatplanner consists of two main tabs: the **Plan** tab and the **Publication Planner** tab.

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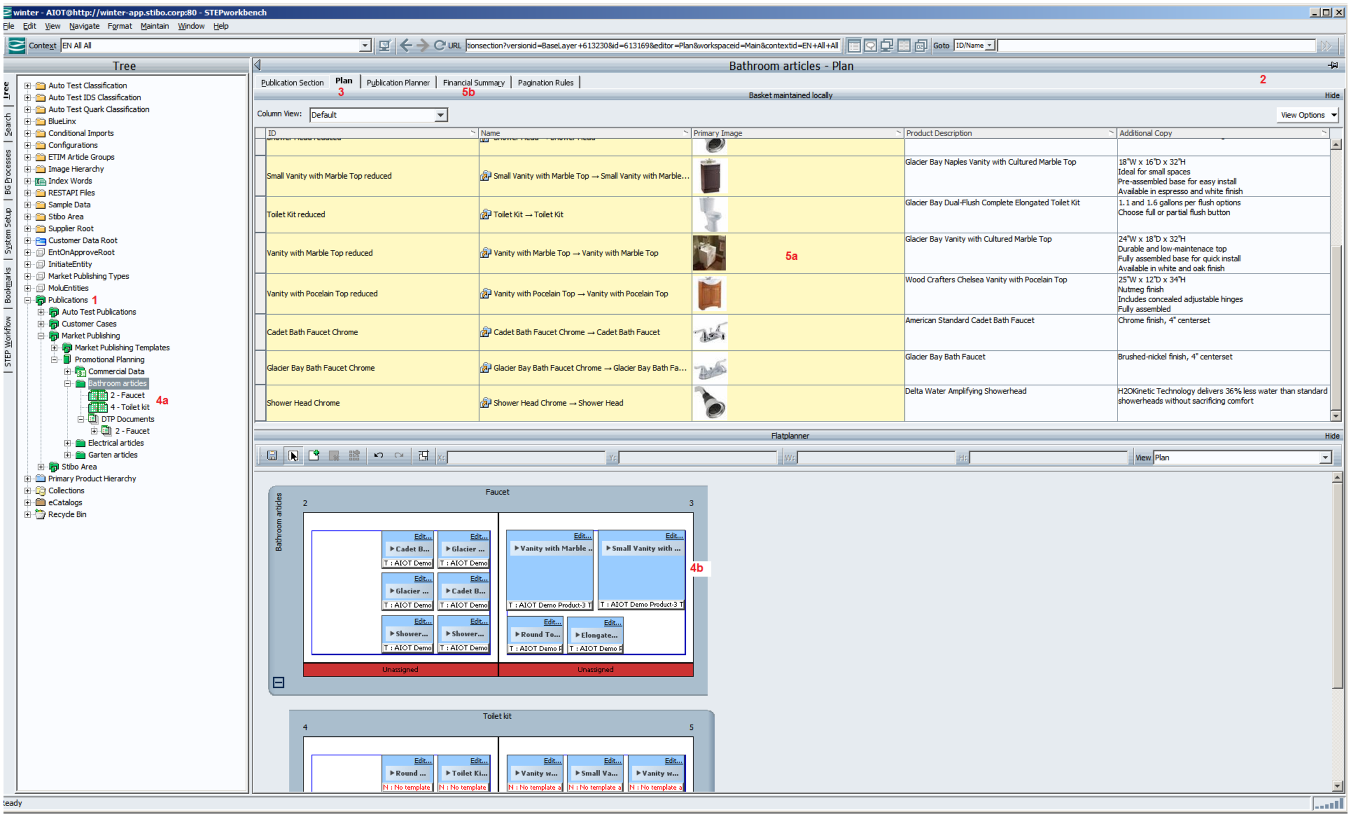
Plan Tab

The Plan tab is available when a publication, section, or spread is selected in the Tree.



1. **Publication hierarchy**. Your starting point.
2. **Basket** and **Flatplanner view**. If you have selected your planned pages, you can choose between Basket and Plan view and Plan view only. Here the Basket and Plan view is shown.
3. **Plan tab**. If you have selected a publication, section, or spread, you can select Plan view.

4a. **Spreads** displayed under Section are Planned Pages.

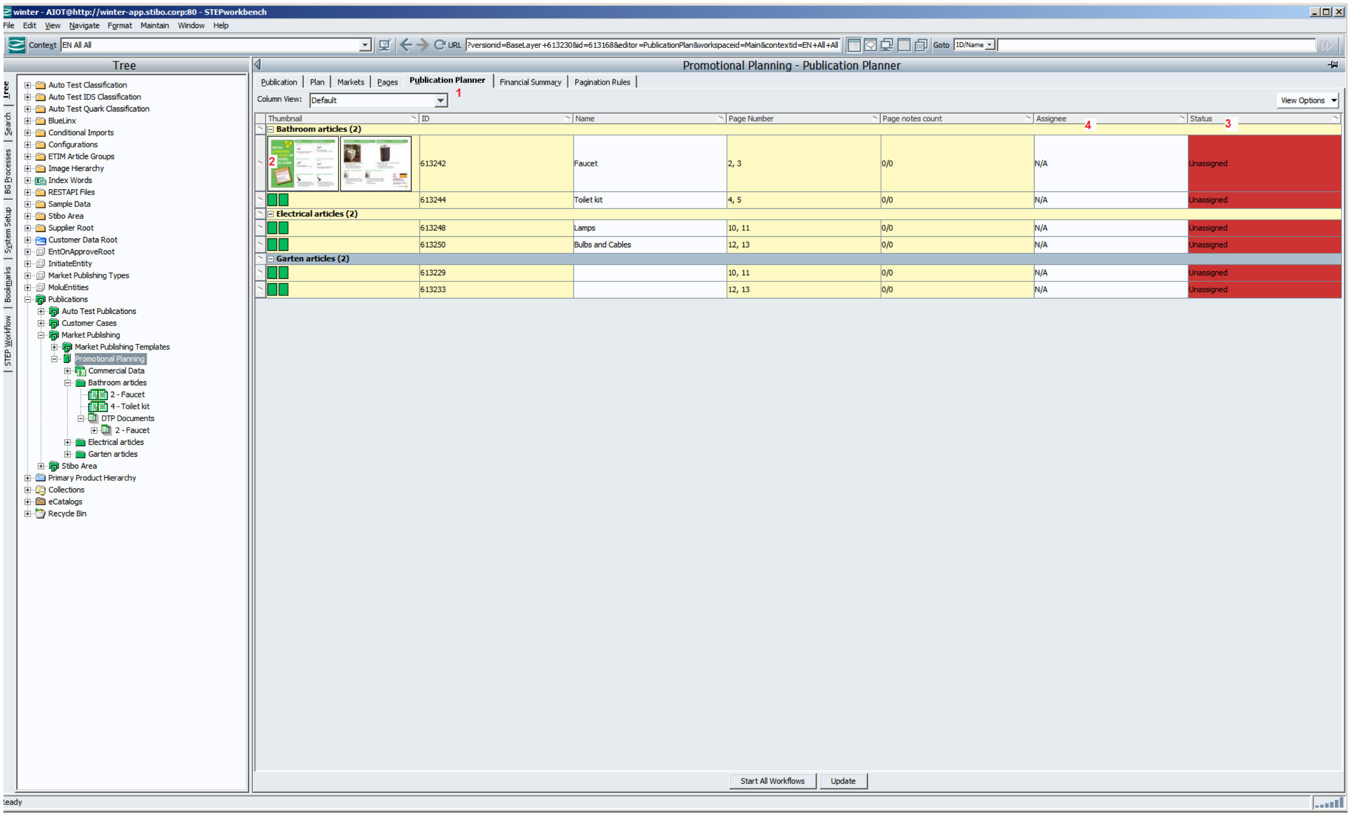
4b. **Flatplanner**. The Flatplanner is a visual-oriented page planning tool. When you drag a product from the basket or Tree and drop it on a Flatplan in an area identified for products, it will be placed / added to the products in that frame.

5b. **Basket**. In your Basket you can see your products and a thumbnail of each of your products.

5c. **Financial Summary**. You can also view data on the Financial Summary tab.

Publication Planner Tab

The Publication Planner tab is available when a publication or section is selected.



1. **Publication Planner**. The Publication Planner is a monitoring tool. Clicking the Publication Planner tab instead of the Plan tab gives you a different view on the same Publication. You can see the name and page numbers of the pages in the Section and the status of each page or Spread.
2. **Thumbnail**. When a page has been finalized in InDesign and saved back to STEP, a thumbnail of the page is shown.
3. **Status**. You can follow the lifecycle of the page in the status column.
4. **Assignee**. The Assignee field displays a list of stakeholders that you can assign to the page.

Element	Icon	Status
Publication Group		Publication group folder
Publication		Publication folder
		Commercial data folder (automatically generated when creating a publication)
		Commercial list

Element	Icon	Status
		Types of commercial lists that are not price
Section		Section folder
		Planned Pages (a Spread)
		DTP Documents (including finalized pages that have been saved back to STEP)
		Finalized DTP page the has been saved back to STEP
Spread		A Spread
Basket		Thumb Pin, locked position
		Thumb Pin, unlocked position

Flatplanner Components

STEP Flatplanner consists of the following components:

- Publication Planner
- Flatplanner

Publication Planner

The Publication Planner allows you to plan the rough layout of a catalog in sections and spreads or individual pages, and assign page templates that decide the overall layout.

You can assign owners to individual spreads or pages.

Flatplanner

The Flatplanner is a page planning and briefing tool that allows you to plan the position, size and layout of products on pages. The Flatplanner consists of a basket area and a spread or page planning area.

Yous can pick product offers from a collection or from the tree and add them to the basket for a section or a spread.

Basket View

The basket provides decision support by displaying product attribute information. Filtering and sorting features help you select the right products to be placed in a particular position on the page.

Collections are sometimes used to gather products that should be linked into a basket. Each publication can include products from several collections.

Collection examples:

Collection	Criteria
Acme Pens Spring Catalog	Include Products with Attribute “Brand Name” = “Acme” Exclude uploaded file with Product IDs
Zeta Pens Spring Catalog	Include uploaded file with Product IDs

For more information about working with Collections, see the **Collections** topic within the **Getting Started** documentation.

Sticker Book View

Turn on sticker book view in the Flatplanner to show additional data about the product.

Use the sticker book view to further inspect if the right products have been selected and if they have been placed in the right location on the page and allocated enough space.

Turn on page preview to view the product in a layout that corresponds to the selected product template. You can also view it in a layout picked up from another catalog.

When the planned spread or page is completed, it can be forwarded to a DTP Designer who can adjust the layout in InDesign.

The result of this can be saved back to STEP, and the mounted page can be viewed in the Flatplanner.

Publication Related Elements

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

Publication Group

A publication group is a collection of different publications.

Publication

A publication is a collection of the different sections and commercial data lists. For more information about creating a publication, see the **Overview of Publication Maintenance** section of the **Getting Started** / **STEP User Guide** documentation.

Version

A publication version holds the different variants of the same publication. A publication can have a number of different versions that each point to a commercial list, a context and a workspace.

This is useful, for example, if a publication is released in several languages. Then it is possible to create a version for each language.

Section

A section is an object that is used to store actual (mounted) pages within the publication

Spread

A spread consists of two adjacent, facing pages in a publication with conjoined or connected content.

Basket

A basket is a container for temporarily storing and displaying products, classifications, and assets before they are used on a planned page. Products, classifications, and assets can be retrieved from the STEP database or collection lists and dragged into baskets that are tied to the publication, section, or an individual spread. Alternately, objects can be imported into the basket by the import of a Flatplan Excel, Publication Excel, STEPXML, or even a plain .txt file or .csv file.

For more information about collection lists, see the **Collections** section of the **Getting Started** / **STEP User Guide** documentation.

Using Templates With Flatplanner

To plan and design a catalog in STEP Flatplanner, you will use a **publication template**, **page templates**, and **product templates**.

You can design page templates directly in STEP. However, before you start using Flatplanner, the publication template and product template(s) must be created in InDesign and stored in STEP. For more information, see the STEP'n'design User Guide.

The following is a brief description of the different types of templates.

Page Templates

A page template allows you to define the layout of a page such as defining where you are allowed to place a product and the related product template. For more information, see **Creating Page Templates** in the **Flatplanner** documentation.

Product Templates

A product template enables you to mount fully formatted product presentations directly to the page. The product template controls the following:

- Which attributes are part of the product presentation
- The formatting of the product presentation such as fonts, styles, and so on
- The position of the individual elements

Publication Templates

A publication template defines the document size and margins and contains information about static elements such as page tabs. It also contains definitions of all paragraph and character styles to be used from the product templates.

A publication template is used to create the PDF files of your pages, to create a preview of your pages, and it is also used when mounting the pages in InDesign.

For more information about creating product templates and publication templates, see the following sections of the **STEP'n'design** documentation:

- Publication Templates
- Product Templates

Creating Page Templates

The Create Page Template wizard helps you create a page template with the measures you prefer.

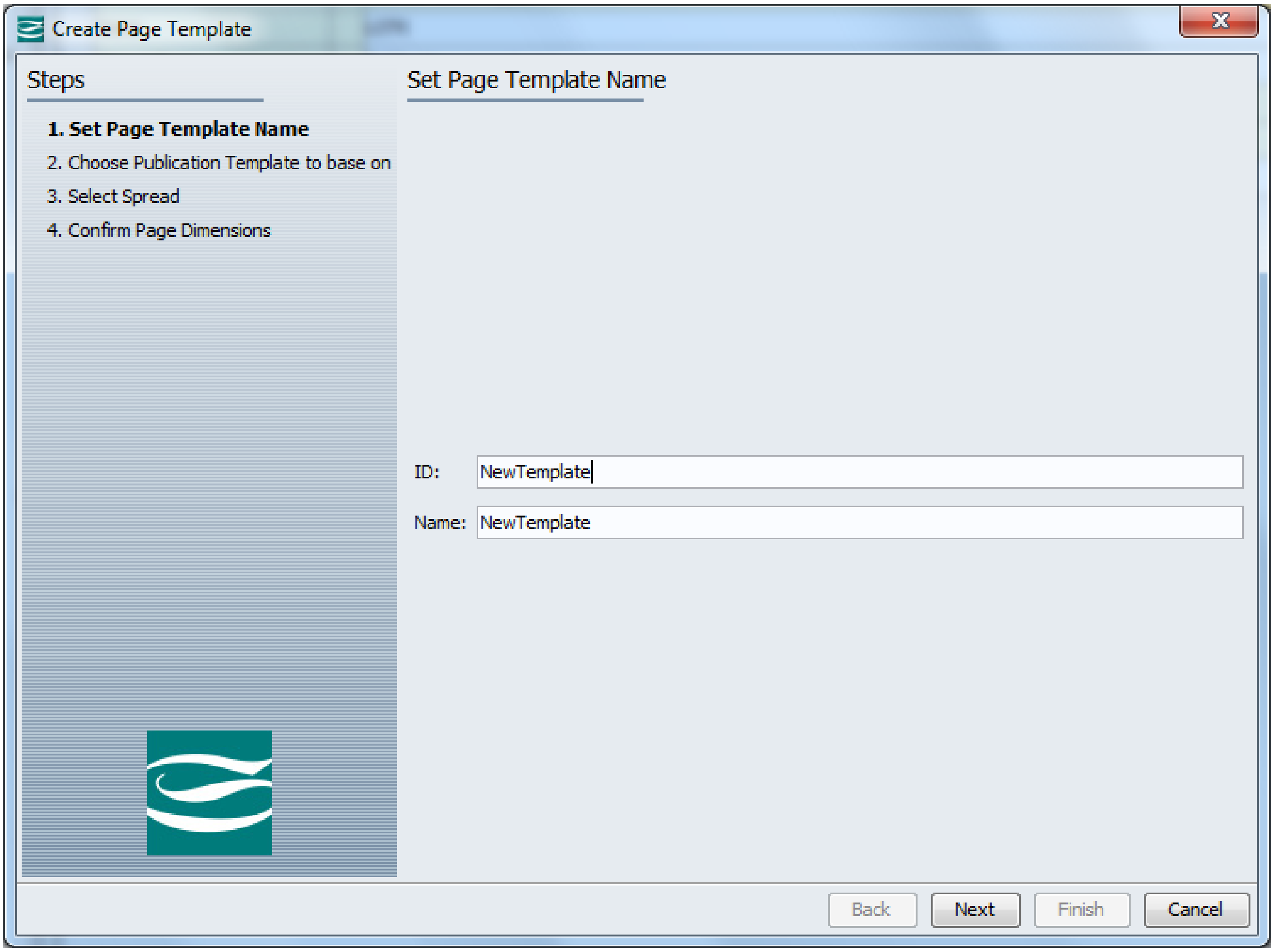
- To start the Create Page Template Wizard, right-click a **Publication Group**, and then select **New Page Template**. The **Create Page Template** wizard appears.

The wizard walks you through four steps.

The Create Template Wizard

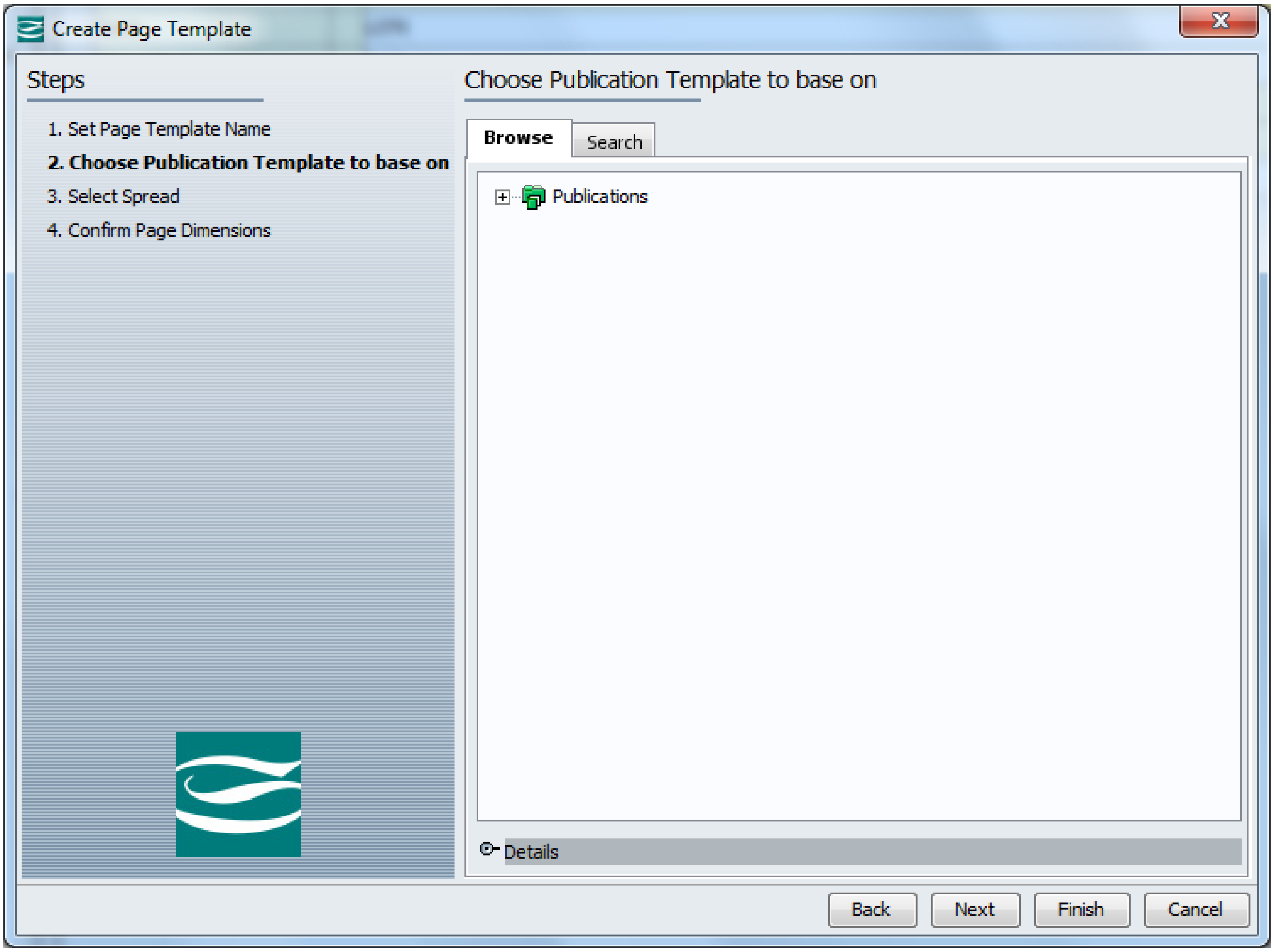
Step 1 - Set Page Template

On the first screen of the Create Template wizard, you specify the name of the template. Enter the **ID** and **Name** of the new page template, and then click **Next**.



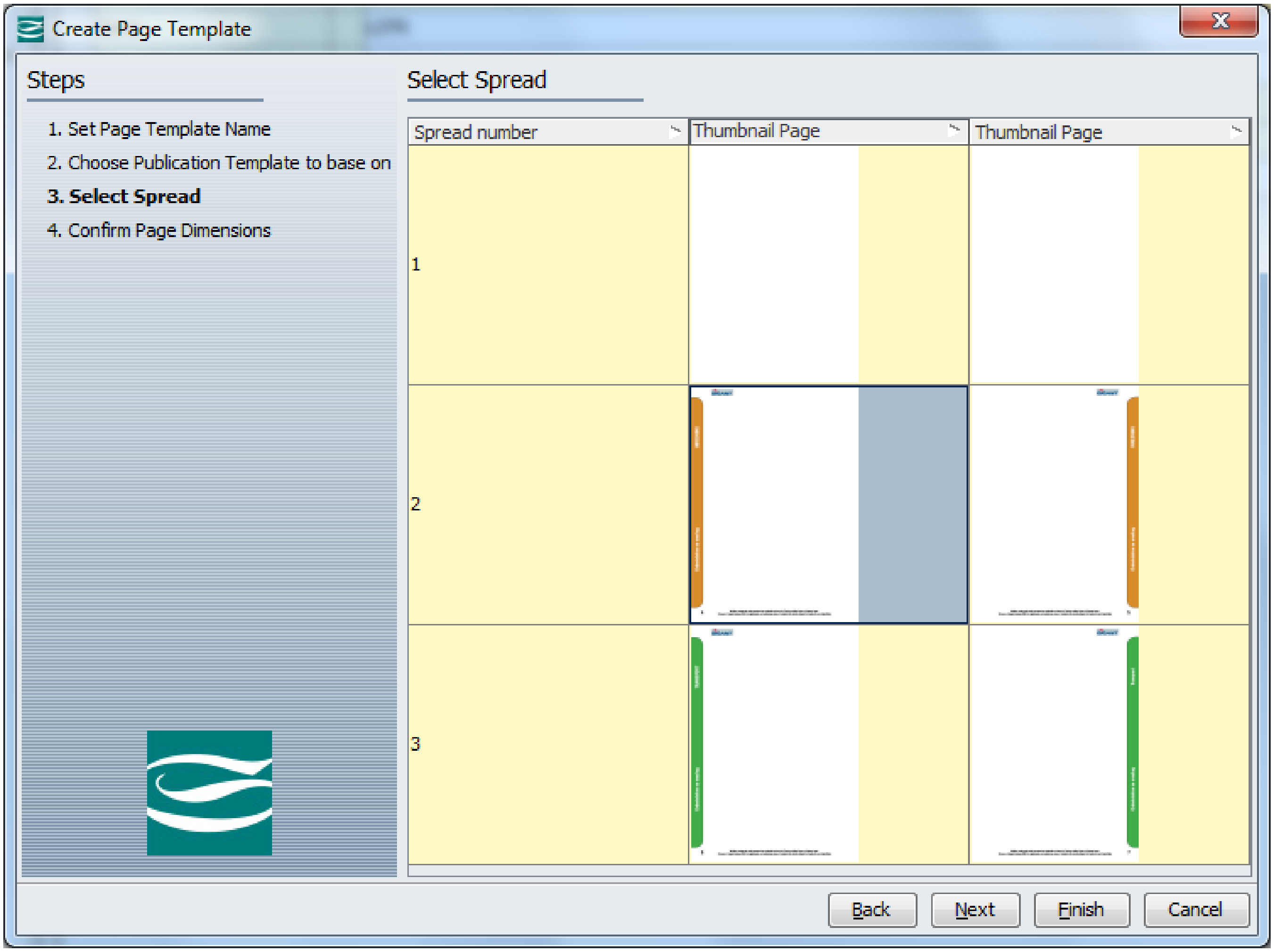
Step 2 - Choose Publication Template

In the next step, you choose the publication template that you want to base the page template on. Expand the **Publication** hierarchy to locate the preferred template. Alternatively, use search to find the preferred template. Click **Next**.



Step 3 - Select Spread

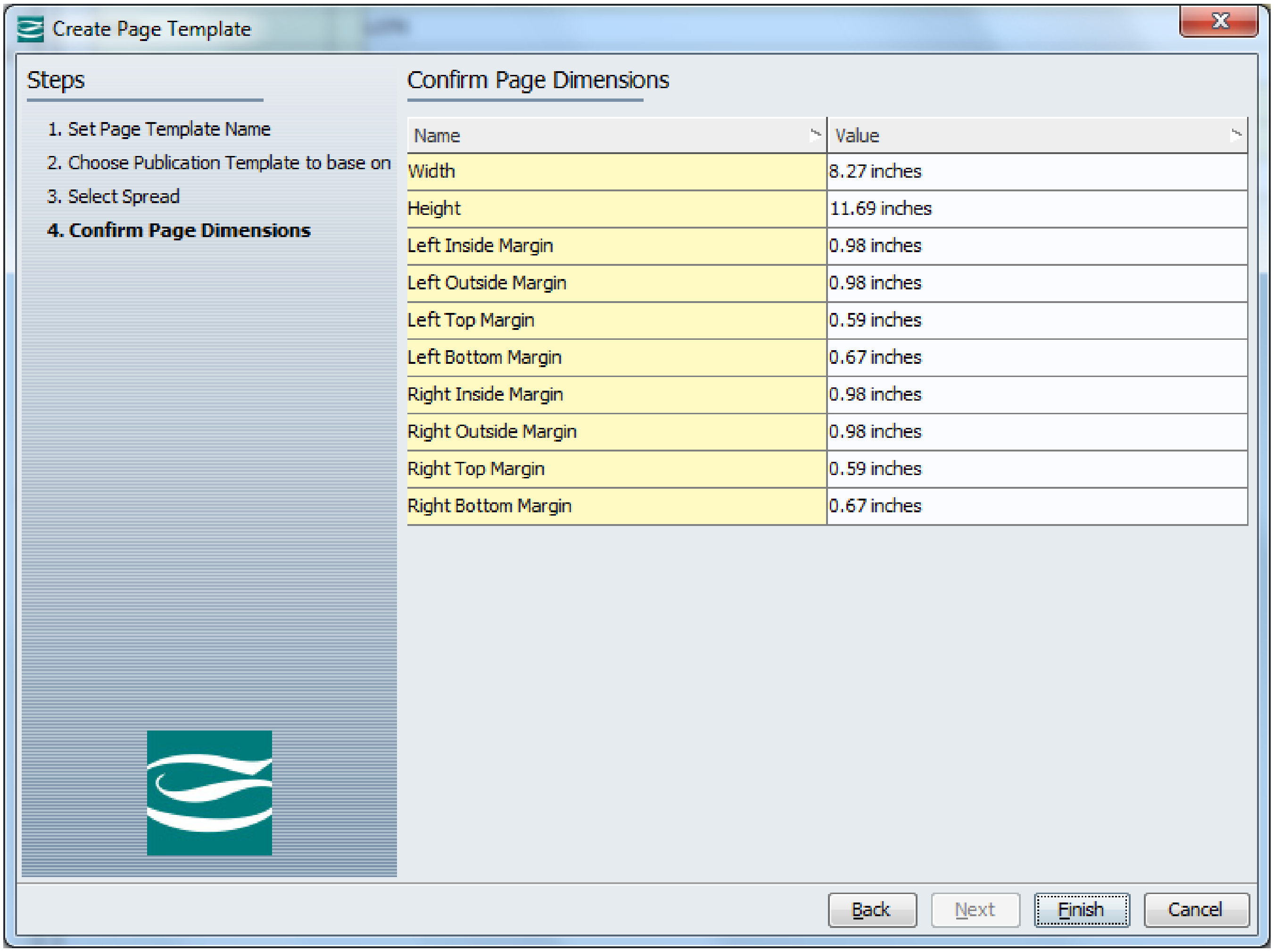
On this screen, you select the relevant spread in the publication template, from which you want to inherit the page size and margins. A thumbnail of each available spreads is displayed. Click **Next**.



Step 4 - Confirm Page Dimensions

The final step of the Create Template wizard provides an overview of the page size and margins of the new page template. You can change any of the measures.

Click **Finish** to create the new page template. The new page template is placed in the Tree below the publication group you initially selected.



Note: You can change the margins of the page template later, but you cannot change the page size of the page template once the page template has been created.

Designing Frames for Page Templates

Frames are used to place product presentations and images in Flatplanner. You use the Designer tool bar on the Designer tab to add and position frames on the page template.

Designer Toolbar

To access the Designer toolbar, click a page template in the Tree, and then click the **Designer** tab.

Tool	Description
 Save	Used to save all changes

Tool	Description
Select	Used to select and move frames and content on the page by dragging them.
Add frame	Used to add new frames by clicking and dragging the mouse.
Delete	Used to delete a frame. Delete is only enabled when one or more frames are selected.
Insert frames on a grid	Used to insert multiple frames in a grid on the page.
Undo	Used to undo your last action.
Redo	Used to redo your last action.
Snap positioning toggle button	Used to enable or disable snapping of frames when they are moved or re-sized.
X Pos: X Pos	Shows the horizontal position of a selected frame. If more frames are selected, the horizontal position is only displayed if it is the same for all selected frames. To change the horizontal position of a frame, enter a new value in the X position field.
Y Pos: Y Pos	Shows the vertical position of a selected frame. If more frames are selected, the vertical position is only displayed if it is the same for all selected frames. To change the vertical position of a frame, enter a new value in the Y position field.

Tool	Description
Width: Width	Shows the width of a selected frame. If more frames are selected, the width is only displayed if it is the same for all selected frames. To change the width of a frame, enter a new value in the Height field.
Height: Height	Shows the height of a selected frame. If more frames are selected, the height is only displayed if it is the same for all selected frames. To change the height of a frame, enter a new value in the Height field.

Working with Frames in Page Templates

To Add a Frame

- To add a frame to a page, select the **Add Frame** tool in the tool bar. Drag an outline of the frame with the cursor while holding down the left mouse button, and then release the mouse button.

To Insert Frames on a Grid

1. To quickly create many frames in a grid, select a page, then click **Insert frames on a Grid** in the tool bar. A dialog box appears:
2. In the **Across** field, enter the number of rows of frames you want to be inserted.
3. In the **Down** field, enter the number of columns of frames you want to be inserted.
4. In the **Vertical Gap** field, enter the distance between the rows of frames.
5. In the **Horizontal Gap** field, enter the distance between the columns of frames.
6. Click **Enter**. The frame grid is inserted on the selected page.

To Select Frames

- To select a frame, click the **Select** tool in the tool bar and click a frame.
- To select multiple frames click the frames while holding down the shift key.

To Delete Frames

- To delete a frame, select the frame with the **Select** tool and then click the **Delete frame** button in the tool bar. You can also select multiple frames and delete these frames the same way.

To Move Frames

- To move a frame, choose the **Select** tool in the tool bar, and then drag and drop the frame. You can also set the X and Y position of one or more selected frames by entering a new value in the **X Position** field and **Y Position** field.

To Resize Frames

- To resize a frame, choose the **Select** tool in the tool bar, select the frame, and then drag the handles on the frame border. Alternatively, enter a new value for one or more selected frames in the **Width** and **Height** fields in the tool bar.

To Enable Snap Positioning

When you move frames on the page using drag and drop, it can be useful to enable Snap Positioning. This makes the moved frame snap to a position when you release the mouse button. This way you can easily place frames in the same X and Y positions on the page. The snap positions are :

- Margin borders: Upper and right hand side border
- Frame borders: All borders

Note: Only the upper frame border and the left hand frame border of the frame that is being moved snaps.

To Change the Order of Frames

Frames are placed on the page in a specific order relative to each other. Adding a new frame places that frame on top of other frames. This is only noticeable if frames overlap each other.

If you want to change the ordering of frame layers, right-click the frame, select **Layers**, and select one of the four options:

- **Bring to fron**t: Brings the selected frame to front.
- **Send to back**: Sends the selected frame to the back.
- **Bring forward**: Brings the selected frame one level forward.
- **Send backward**: Sends the selected frame one level backward.

Note: Moving a frame from one page to another brings the frame layer to a front position.

To Change Frame Properties

To view and maintain details of a frame, select the frame, right-click and select **Frame Properties**. A dialog box appears with the following options.

- **Frame ID**: Editable field that shows the ID of the selected frame.
- **X Position**: Editable field that shows the horizontal position of the selected frame.

- **Y Position**: Editable field that shows the vertical position of the selected frame.
- **Width**: Editable field that shows the width of the selected frame.
- **Height**: Editable field that shows the height of the selected frame.
- **Layer**: Editable list that defines the frames order relative to other frames on the page. '0' means that the frame is in the back.

To View Frame IDs

Each frame on a page template has an ID.

- To view the ID of the frames on a page, right-click the page and select **Show Frame IDs**. A small box containing the IDs appears in all the frames on the spread.

To Change Frame IDs

- To change the ID of a frame, right-click the frame and select **Frame Properties**. A dialog box appears where you can change the ID.

To Change Margins

- To change the margins of a page template, right-click the white area on the page and select **Margins**. A dialog box appears where you can set the margins. You can choose if the changes should apply to the whole spread or only to the selected page.
- To apply the changes to the selected page, click **Left** if you have selected a left-hand page or **Right** if you have selected a right-hand page.. To apply the changes to both the left-hand and the right-hand page, click **Spread**.

If you want to enter the same values for Top/Bottom/ Inside/Outside margins,make sure the padlock button is enabled (locked).

To Zoom In and Out

- To zoom in, right-click the page and select **Zoom In**.
- To zoom out, right-click the page and select **Zoom Out**.

To Copy and Paste Pages

It is possible to copy and paste a page including frames:

1. Right-click the page you want to copy and select **Copy Page**.
2. Right-click the page you want to paste the copied page to and select **Paste Page**.

The copied page including frames is pasted.

Note: A warning appears if you try to paste a left-hand page to a right-hand page and vice versa.

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Creating Page Templates in InDesign

This section describes how to create a page template in InDesign, apply layout styles to a page, and how to store the page template locally and/or in STEP. Page templates are only used in conjunction with STEP Flatplanner.

A page template allows you to define the layout style of a page. It defines:

- Where you are allowed to place a product with its product template.
- How many products you are allowed to place.
- Where you can place images.
- Where you can place free text.

Though it is strongly recommended to create page templates directly in the Page Template Designer tool in the STEP Workbench, there are certain exceptions where the page template must be created in InDesign:

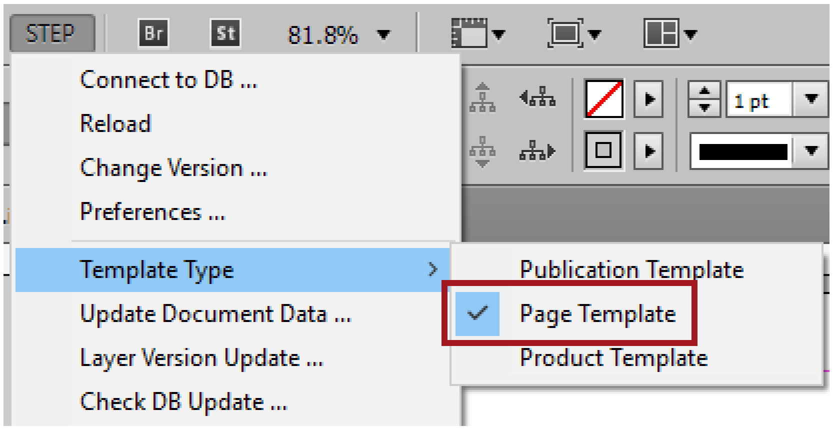
- **Galley** page templates must be created in InDesign
- Page templates where styling is needed in the Flatplanner frames must be created in InDesign, though this is uncommon. Typically, all styling is handled on product templates and publication templates / mounting pages.
- Layouts where Flatplanner frames must be very precisely aligned against each other with no or extremely little space in between (also uncommon, but may be helpful for layouts such as coupon flyers). Using InDesign to create these types of page templates will give a more precise level of control over frame alignment than what is available in the Flatplanner.

Note: Before you can use InDesign-created page templates with STEP Flatplanner, the templates must first be saved back to STEP and assigned to a publication.

Creating a Page Template in InDesign

To create a page template in InDesign:

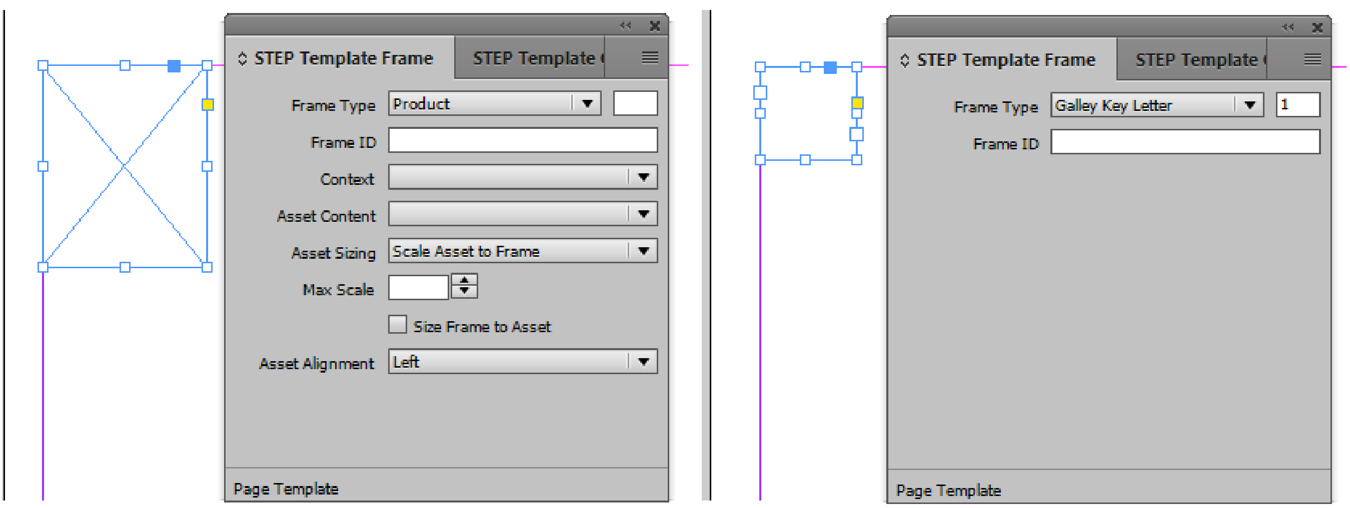
1. Create a new InDesign document that has the same page size and margins as the publication template being used in the publication.
2. Check the **Facing Pages** check box to create a spread.
3. Navigate to STEP > Template Type and choose **Page Template**.



Applying Frames to the Page Template

To complete the page template, frames must be added to it. Frames are added from the **STEP Template Frame** palette.

1. Open the STEP Template Frame palette by navigating to Window > STEP Template Frame.
2. Draw either a text frame using the Type tool (T) or an image frame using the Rectangle Frame tool (F).
3. With the frame selected, choose the desired frame type from the **Frame Type** dropdown list. The following screenshots show the available options for image frames (L) and text frames (R).



4. Repeat step 2 - 3 for each element you want to allow on the pages in your publication.

When the pages with the different frame types are viewed in the Flatplanner **Plan** view, each frame type is represented by a colored square. For more information about the Flatplanner and the colored squares, see STEP Flatplanner User Guide.

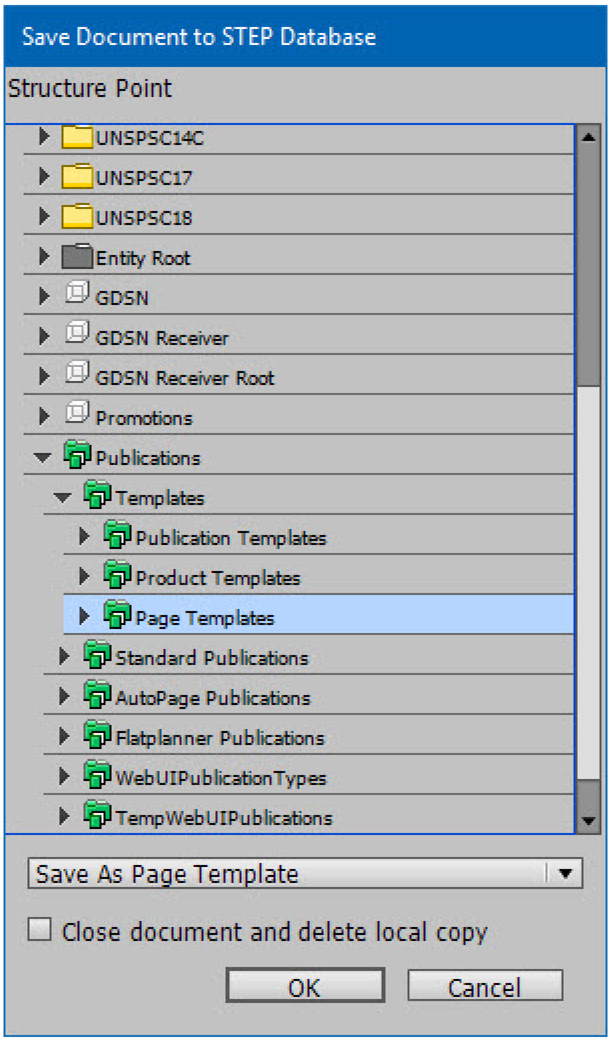
For more detailed information about the different frame types, see the **Galley Templates** section of the **Flatplanner** documentation.

Storing the Page Template

Once you have created a page template, it must be saved to STEP in order to use it in conjunction with Flatplanner, as well as to make it available to other STEP users.

To store the template in STEP:

1. Save the InDesign document on your local hard drive as a standard InDesign file (suffix .indd).
2. In the STEP menu, click 'Save Document to DB.' A Save Document to STEP Database dialog box appears.

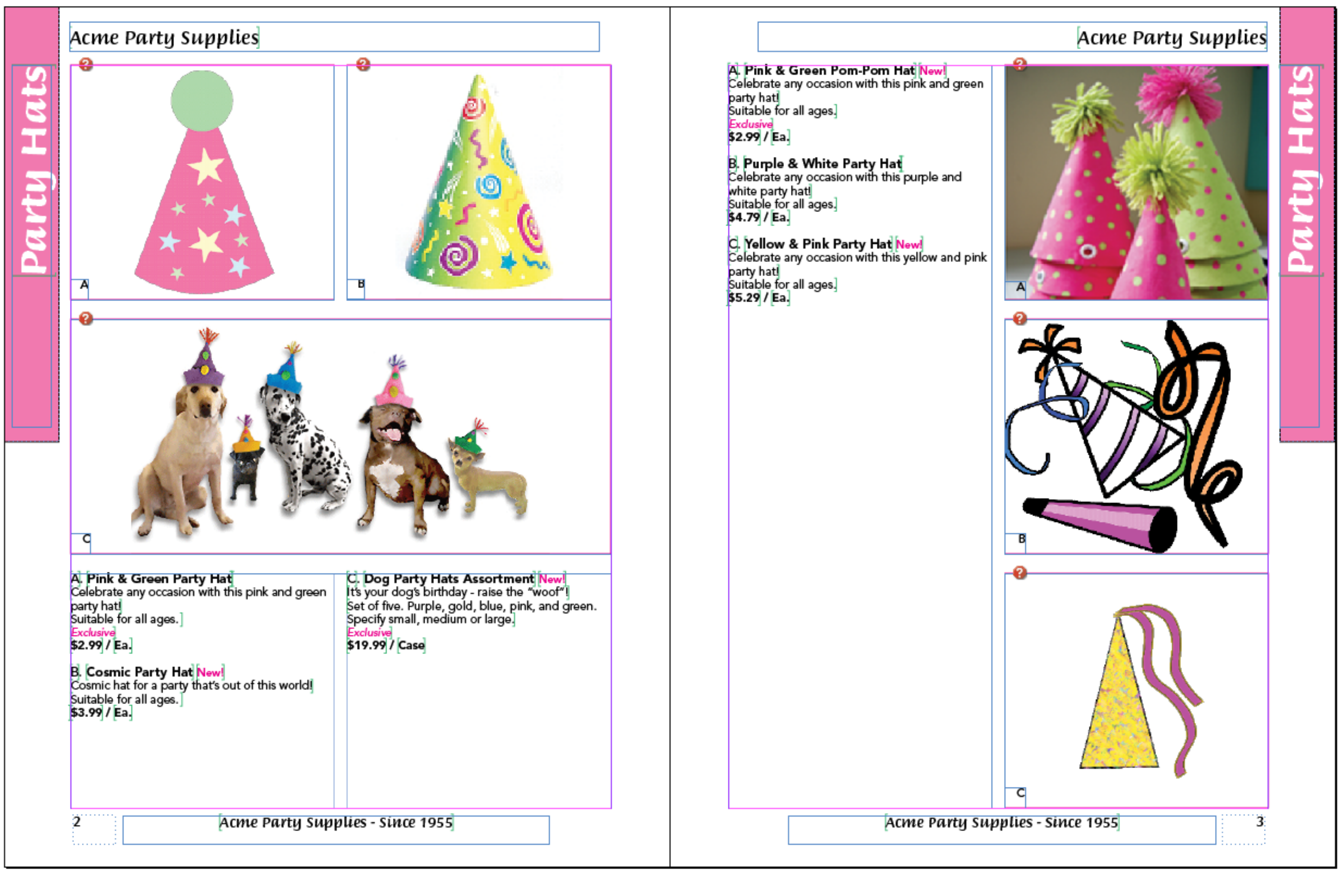


3. Select the publication group you want to save the document to, then select **Save as Page Template** from the dropdown list.
4. Click **OK**.

Galley Templates

The 'galley' format is a common layout style for retail catalogs. Galley layouts incorporate the use of Key Letters, which connect product images with the text that describes the product. To build a Galley Page layout in STEP, Galley Page Templates are used in conjunction with Galley Product Templates. Both types of Galley Templates are supported by Flatplanner publications only.

The following is an example of a Galley Page created from STEP. Notice how images are separate from the text, which appears at either the bottom or the side of the page. Each image is identified by a Key Letter (A, B, C, etc.) that correlates it to the corresponding text across the bottom or the side of the page.



Galley Page Templates

Unlike standard page templates, which are typically created in the workbench, Galley page templates are created in InDesign.

Galley page templates use **key letters**, which must be designated in the page template in InDesign.

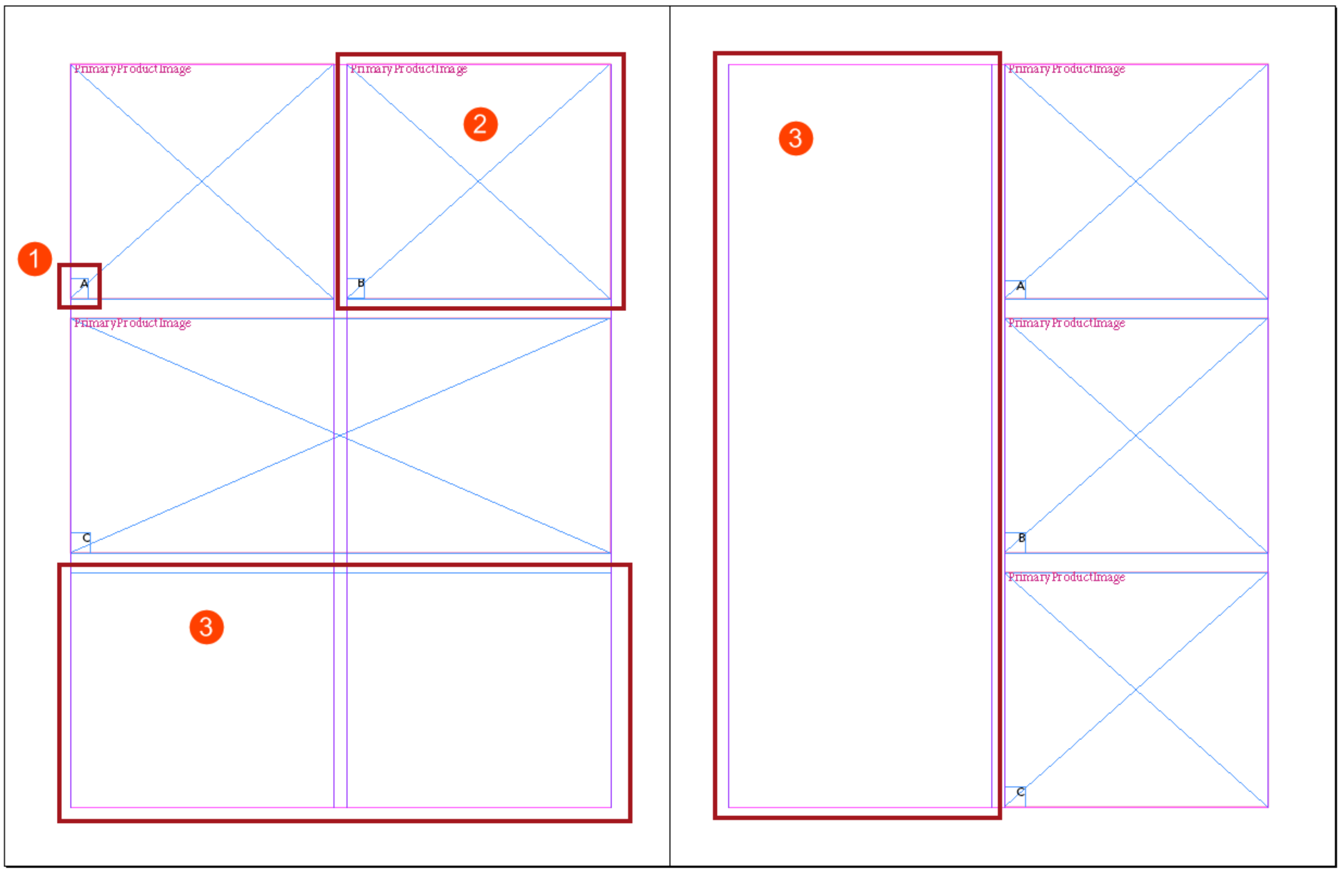
The following types of frames are used in Galley page templates:

1. Galley key letter
2. Image frame
3. Galley text frames

Optionally, Galley page templates can also contain the following additional frame types:

- Text frames containing attribute references
- Standalone image frames that are not connected with key letters
- Standalone product frames that are not connected with key letters and can be linked to non-Galley product templates

For more information on these optional frame configurations, see the **Advanced Galley Page Template Frame Options** section of the **Galley Templates** documentation.

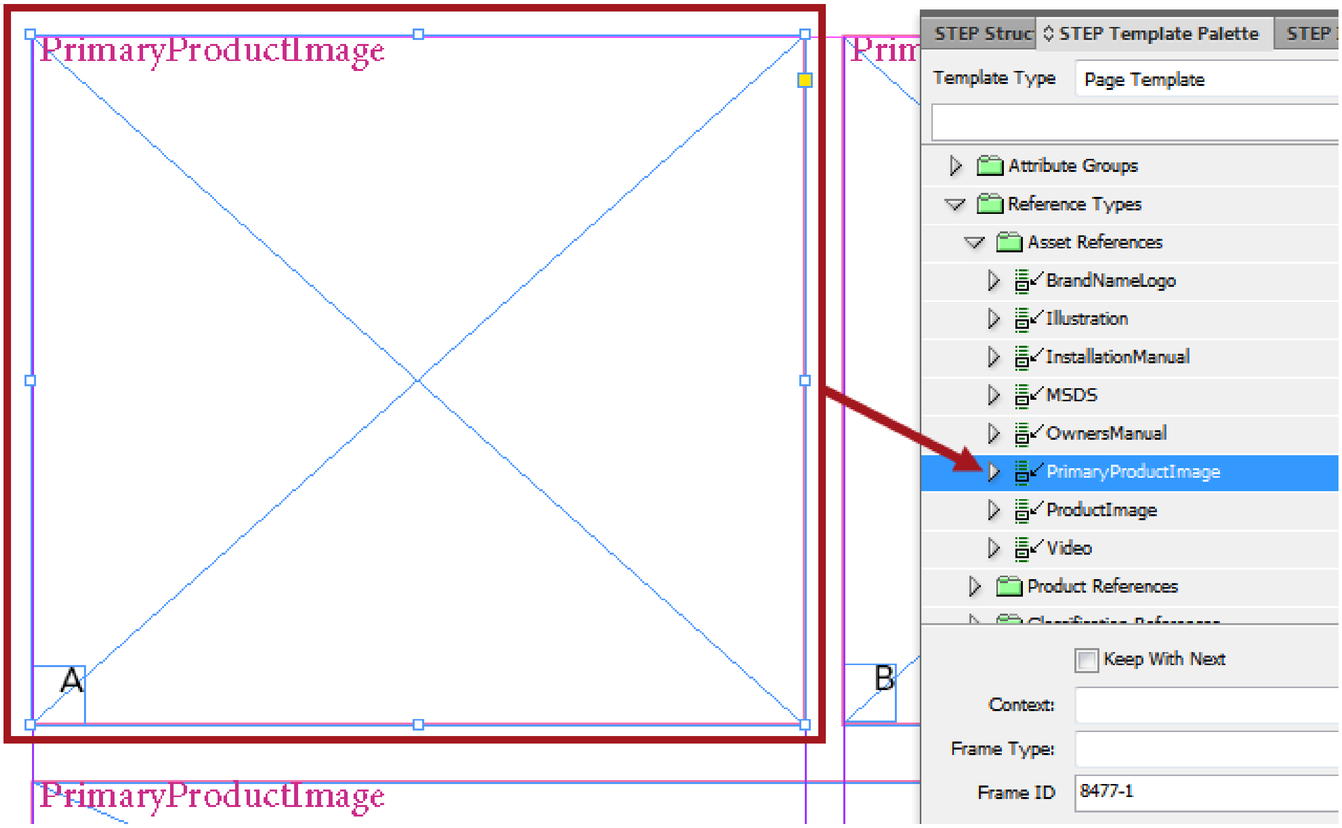


Grouping and Configuration of Key Letters and Image Frames

Galley page templates typically use three types of frames: image, Galley key letter, and Galley text.

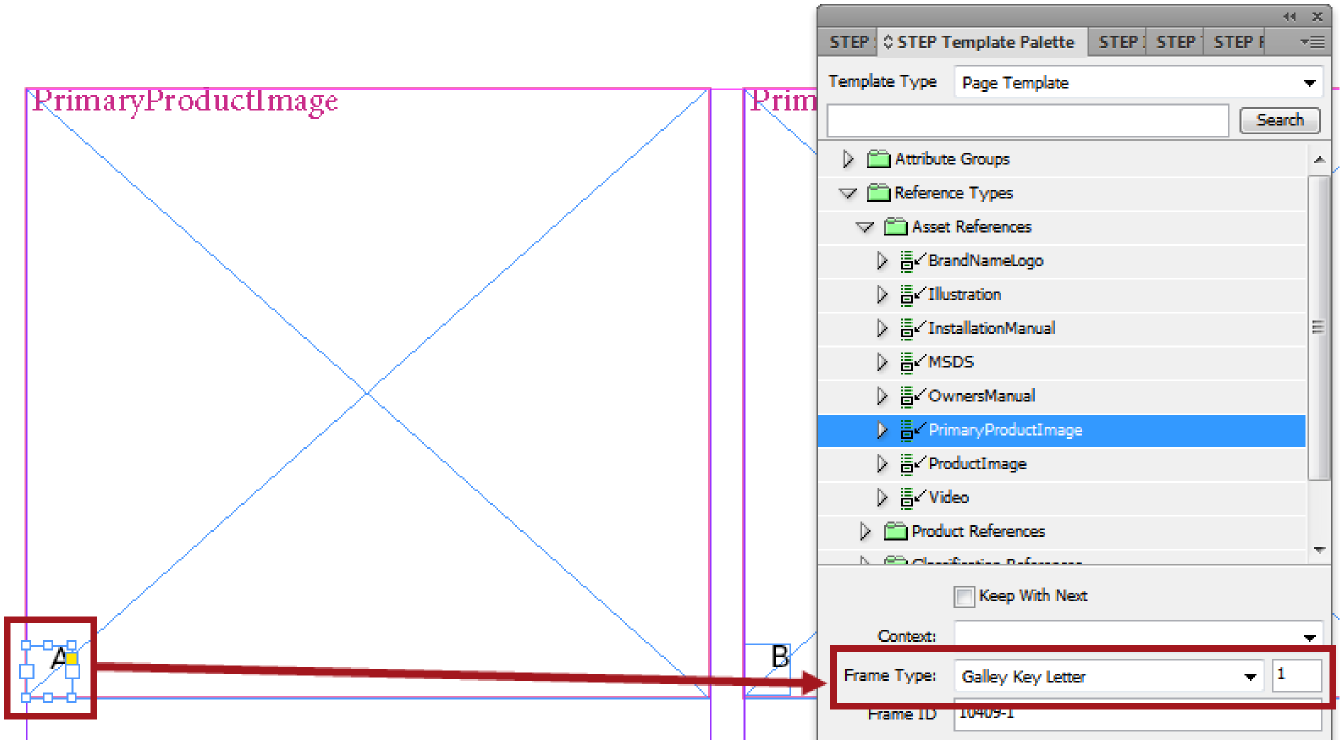
Image Frames

Image frames should be configured in the STEP Template Palette to call out an image reference type. This is nearly identical to product template functionality. A frame type is not assigned to the image frame. (The only time a frame needs to be designated as an 'image' is if an image asset will be dragged directly into that square in the Flatplan.) Best practice for images on Galley pages is to only use one image per reference type. Note that Frame IDs are automatically generated, as they must always be unique.

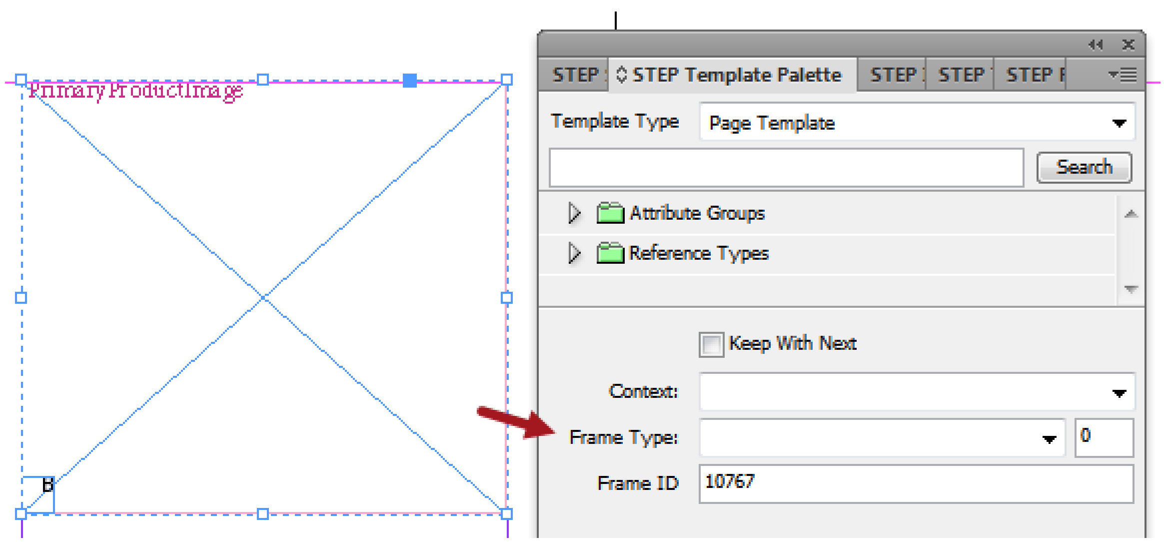


Galley Key Letter Frames

The Galley key letter frame should be a standard text box with the letter / number manually entered inside. This frame must be designated as a **Galley Key Letter**. The number indicates the order in which products should appear on the page. For this example, box A will be 1, box B will be 2, and so forth.

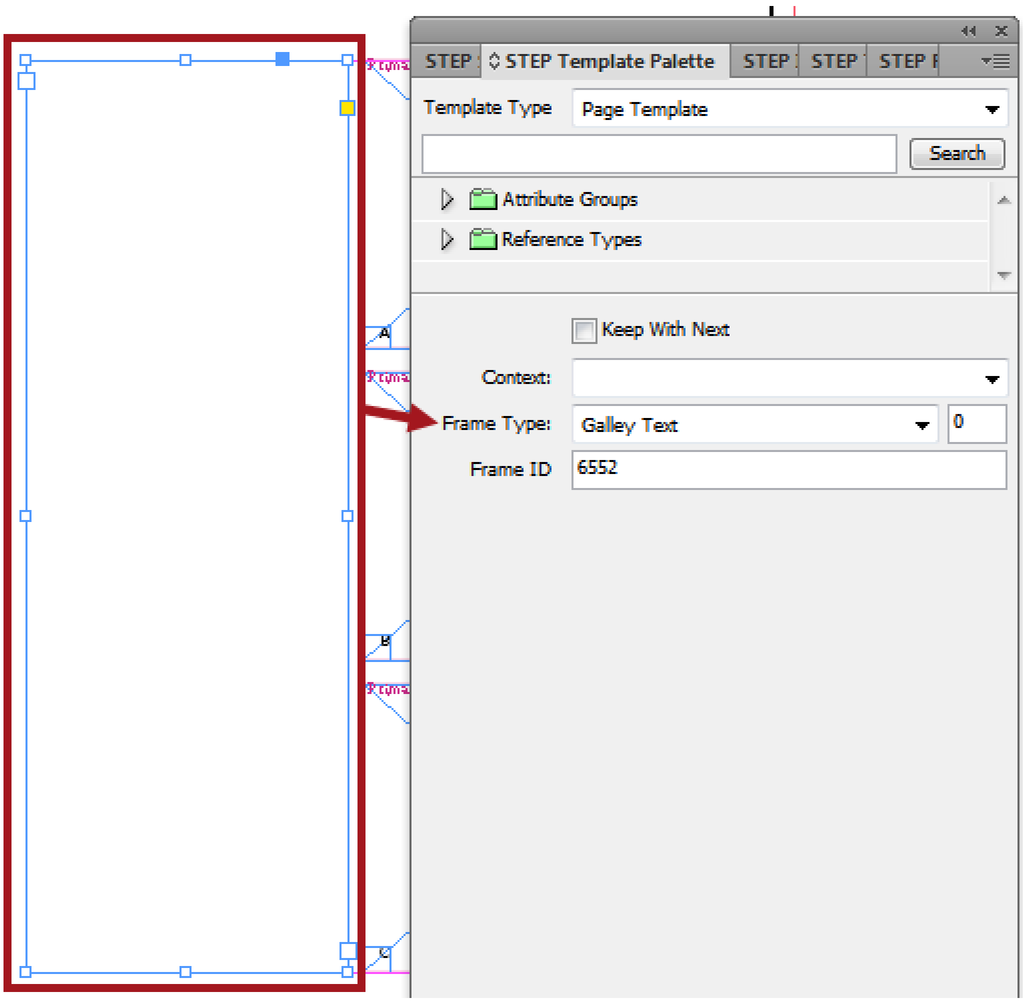


The image and Galley key letter frame must next be grouped together. A frame type does not need to be assigned to the grouped frames.



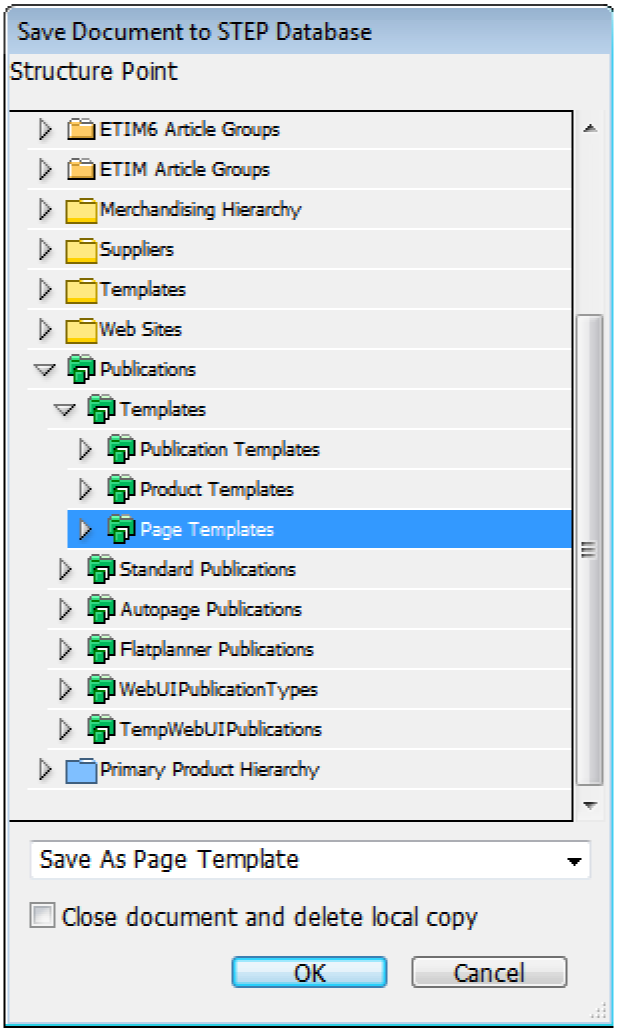
Galley Text Frame

In this example, the text frame is a single text frame across the left-side of the page. It will be designated as a **Galley Text** frame. Since text from all products will go into this single frame, it does not need a number designation.



Saving the Galley Page Template to STEP

The Galley page template will be saved to STEP from within InDesign. It will be saved as a page template to a publication group folder. See the **Page Template** section of the **STEP'n'design** documentation for more information on saving page templates to STEP.



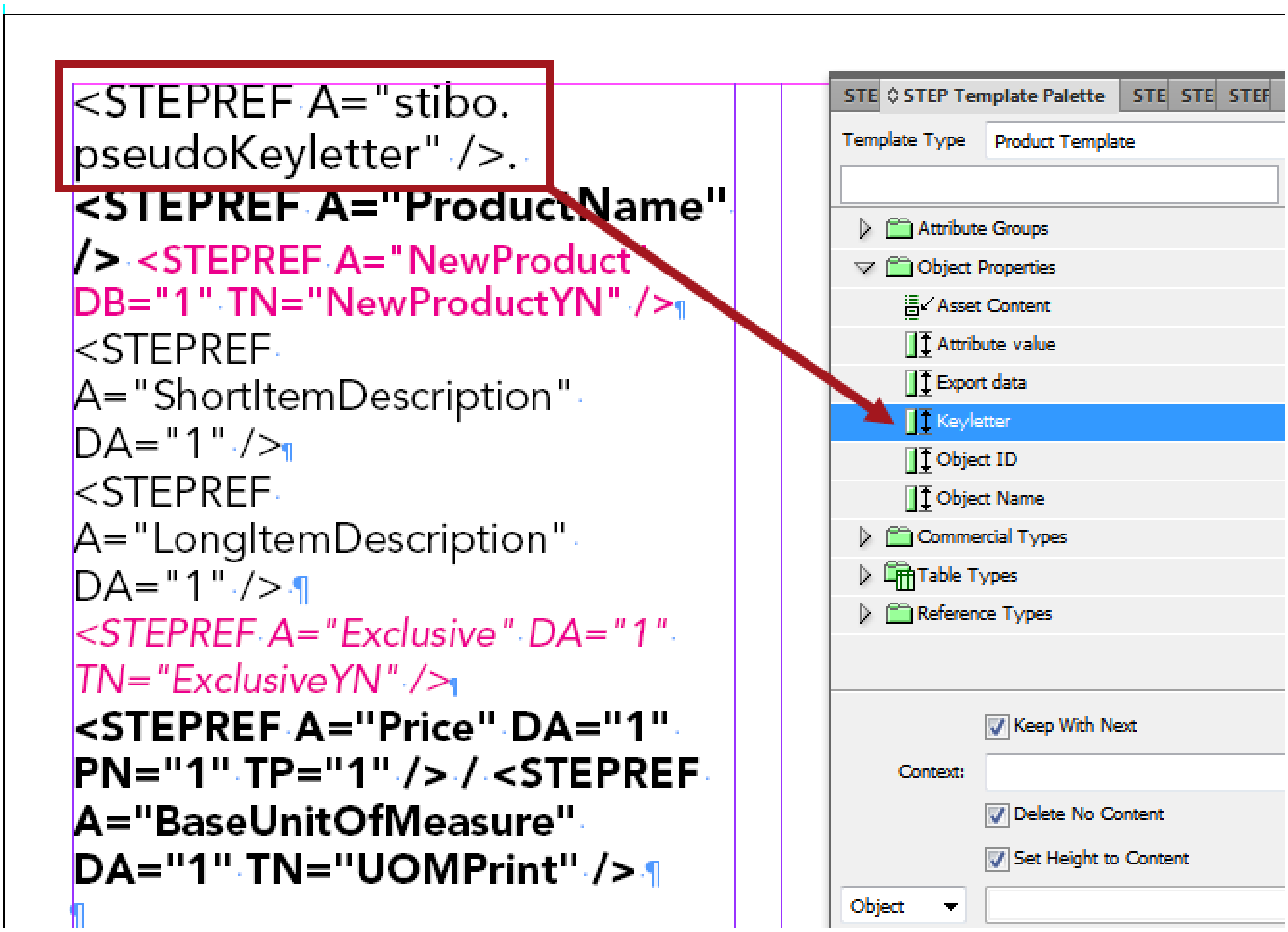
Galley Product Templates

Galley product templates differ from standard product templates in that image frames are not included on Galley product templates. Images for Galley pages are handled by Galley page templates instead.

Key Letter and attribute (i.e., textual) content is all that appears in Galley product templates. All content is placed inside a single text frame.

To add the Key Letter tag to the product template, navigate to **Object Properties** > **Keyletter** in the STEP Template Palette in InDesign. Then, drag the Keyletter 'attribute' onto the page. Other attributes will be added into the text frame as per standard product template procedure.

For more information on building standard product templates, see the **Product Template** section of the **STEP'n'design** documentation.

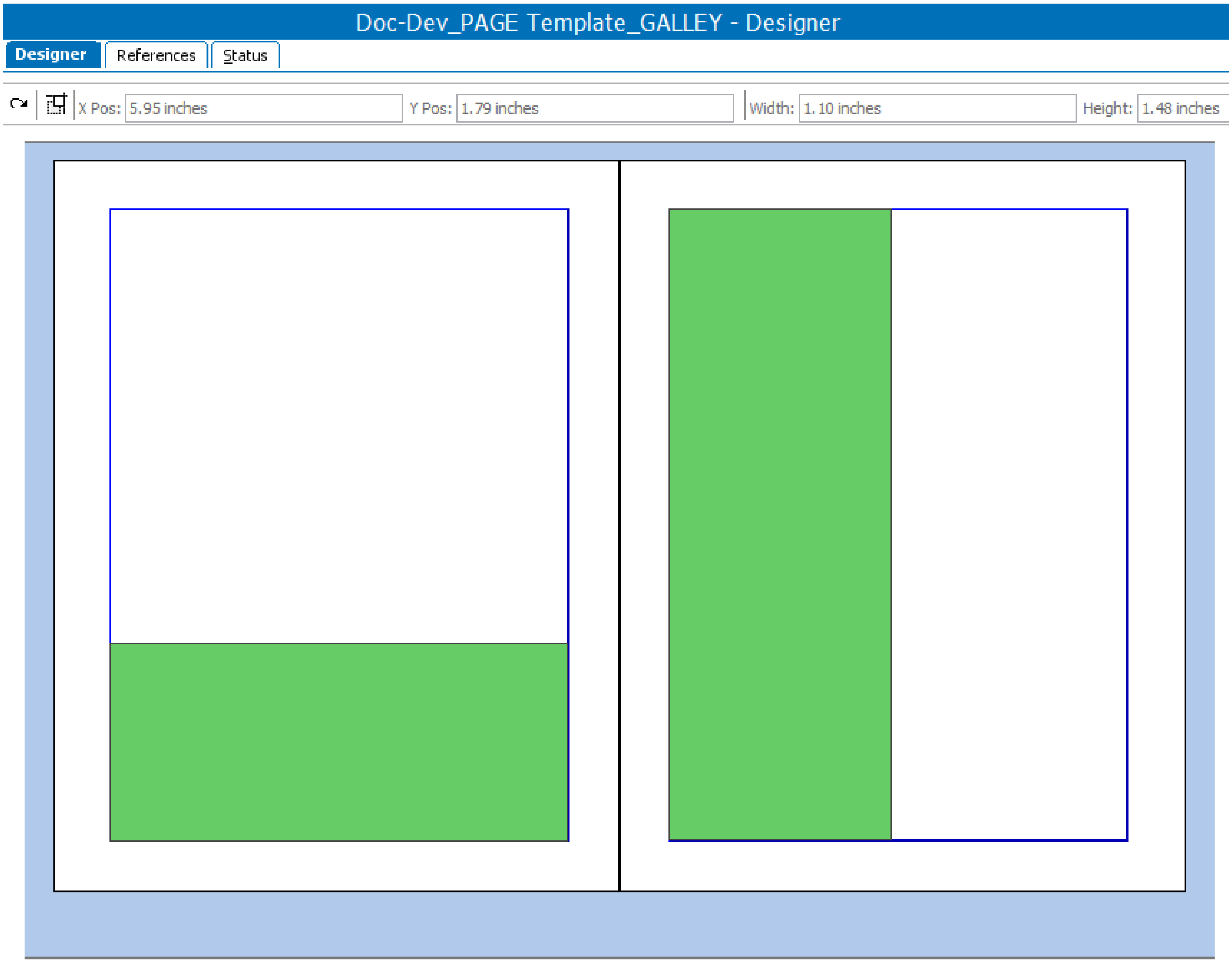


Working With Galley Page Templates in STEP

The following screenshot shows what a Galley page template looks like on the page template **Designer** tab. The green frames indicate **Galley Text** frames. Note that no image frames appear on the page.

Unlike the frames contained in standard page templates created in the workbench, green Galley text frames cannot be manipulated in the page template designer.

This section will explain the special handling involved in linking product objects to planned pages that use a Galley page template to drive the layout.

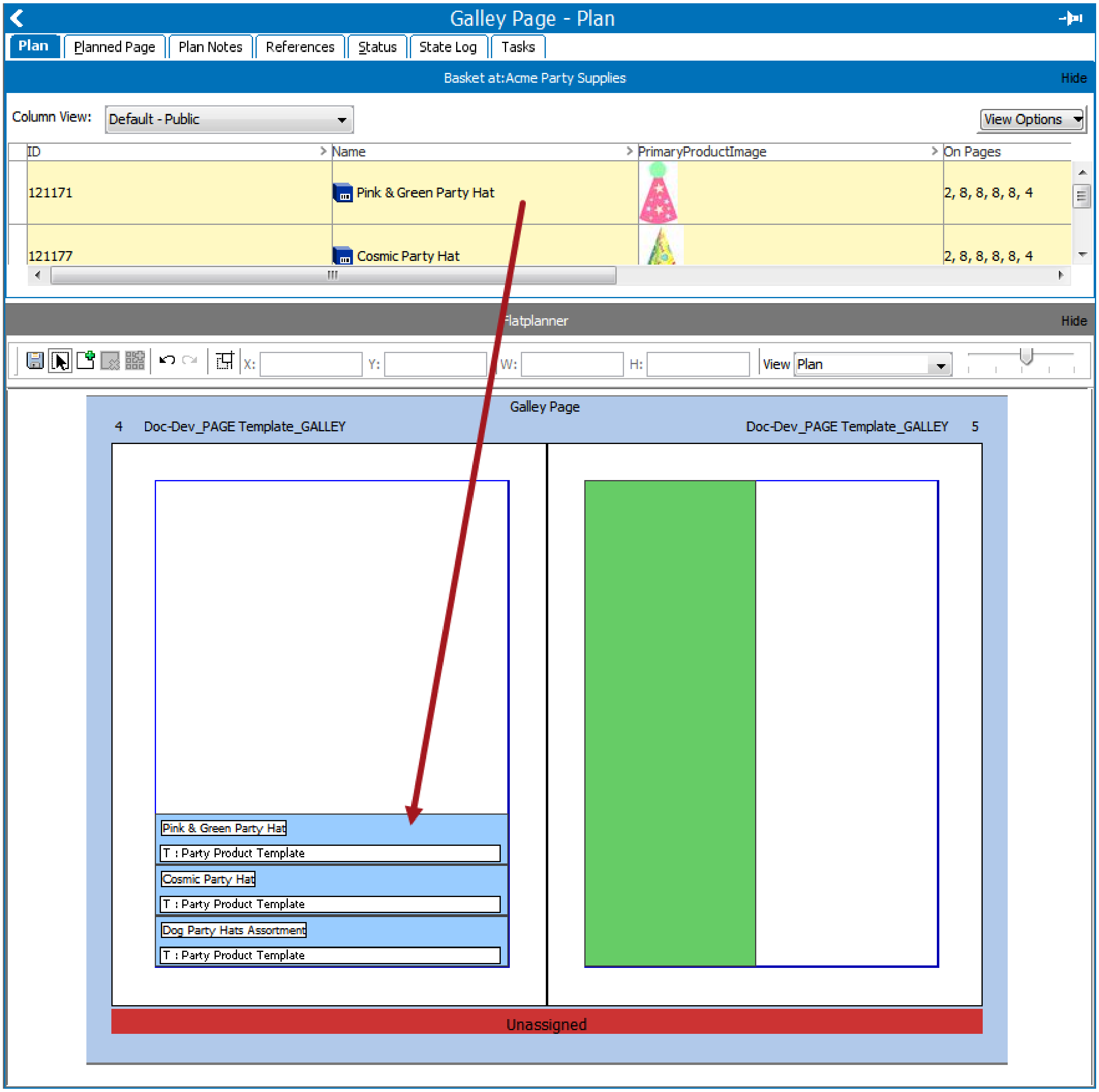


Linking Products to Galley Text Frames

Unlike standard Flatplanner planned pages, there is not a 1-to-1 relationship between product objects and Flatplanner frames when using Galley layouts. All products that should appear on a page are linked into a single green Galley text frame. In other words, there is a 1-to-many relationship between Galley frames and product objects.

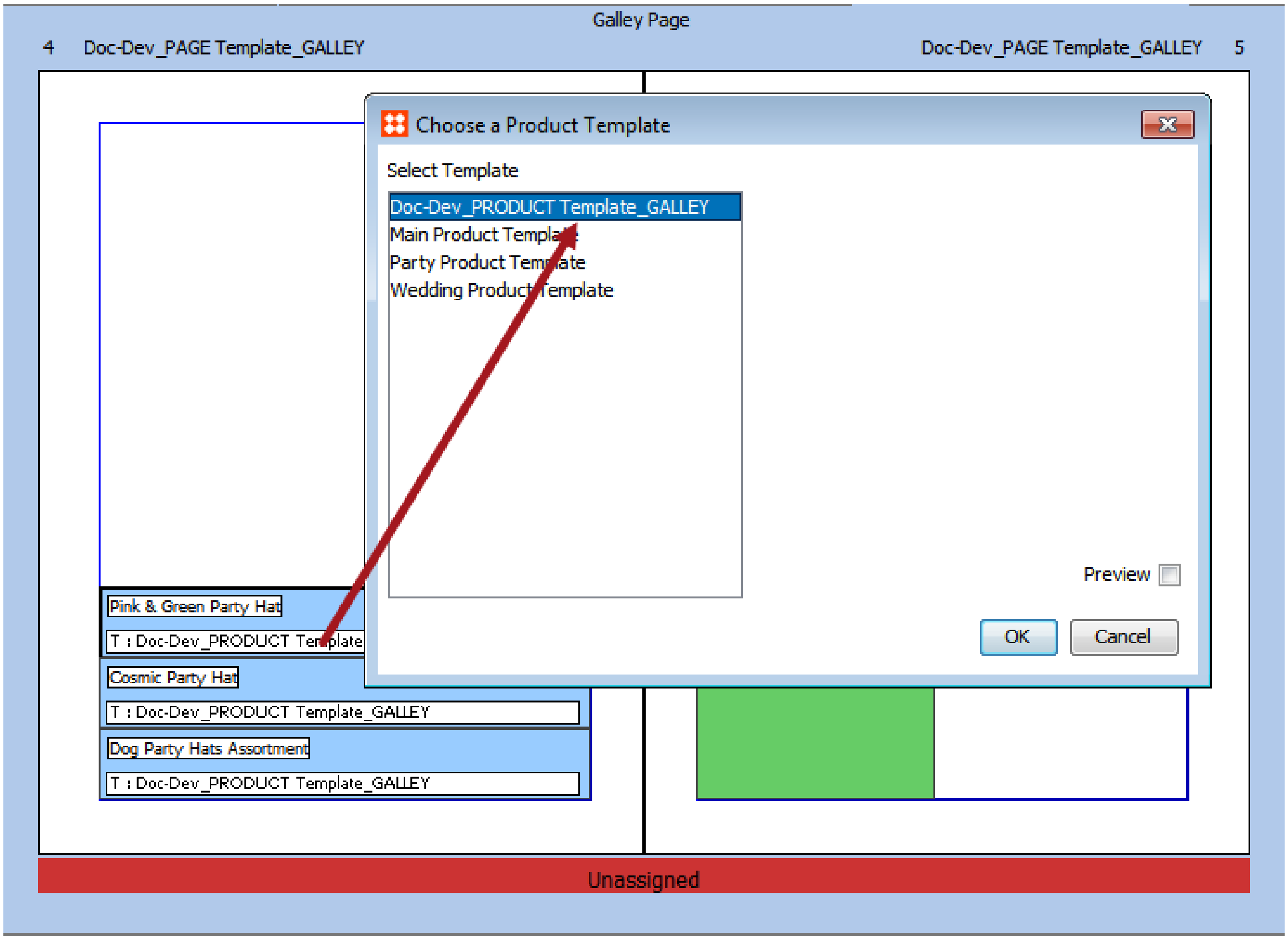
In the **Plan** view, product objects should be dragged into Galley frames in the order that they should appear on the planned page. In the example below, there are three products inside a single frame. The product on the top will be the first product, i.e., Galley key letter A. The second product will be Galley key letter B, and so on.

Note: Ordering product objects in Galley frames may involve some removal and re-adding, as the products cannot be rearranged once placed into the frame. One way to ensure that your product objects appear in the correct order is to arrange them in the Flatplanner basket first, then multi-select them and drag them onto the frame together.

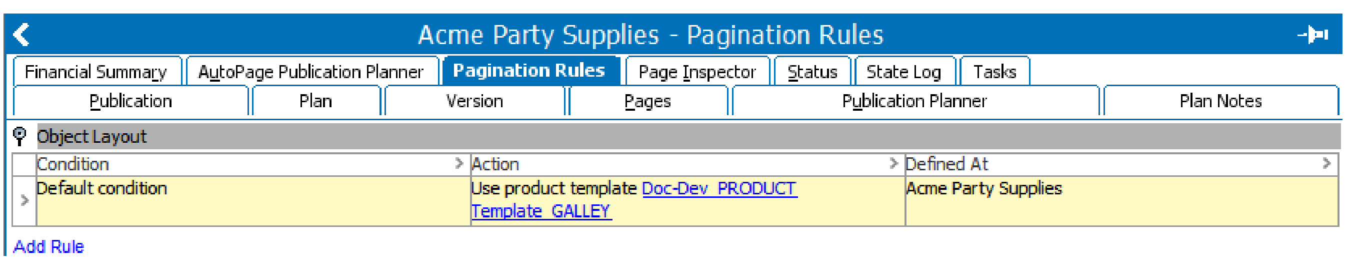


Assigning Galley Product Templates to Products in a Galley Frame

1. Right-click in a white area on the planned page and select View > **Show Product Templates**.
2. Left-click in the white product template box on the frame and choose the Galley product template that you would like to use in the **Choose a Product Template** dialog.



Galley product templates may also be pre-assigned to product objects through Flatplanner pagination rules. The following screenshot shows an example of a rule that has been set to use a Galley product template as the default layout. For more information on Flatplanner pagination rules, see **Pagination Rules for Flatplanner** in the **Flatplanner** documentation.



Mounting the Galley Page

Galley pages are mounted like any other Flatplanner page in InDesign. For more information, see **Finalizing Pages in InDesign** in the **Flatplanner** documentation.

Advanced Galley Page Template Frame Options

Text frames containing attribute references, as well as additional image frames containing product or asset references, may be grouped together with the image frame and Galley key letter frame. In addition, any frame appearing on a Galley page template may be styled with background shading, borders, and so forth. This allows more flexibility in the layout of Galley pages, since Galley product templates may only contain text. (See the **Galley Product Templates** documentation for Galley product template configuration instructions.)

The following screenshots show a 'before' and 'after' of a more advanced setup. The first screenshot shows the stylized page template, and the second screenshot shows the mounted page in InDesign:

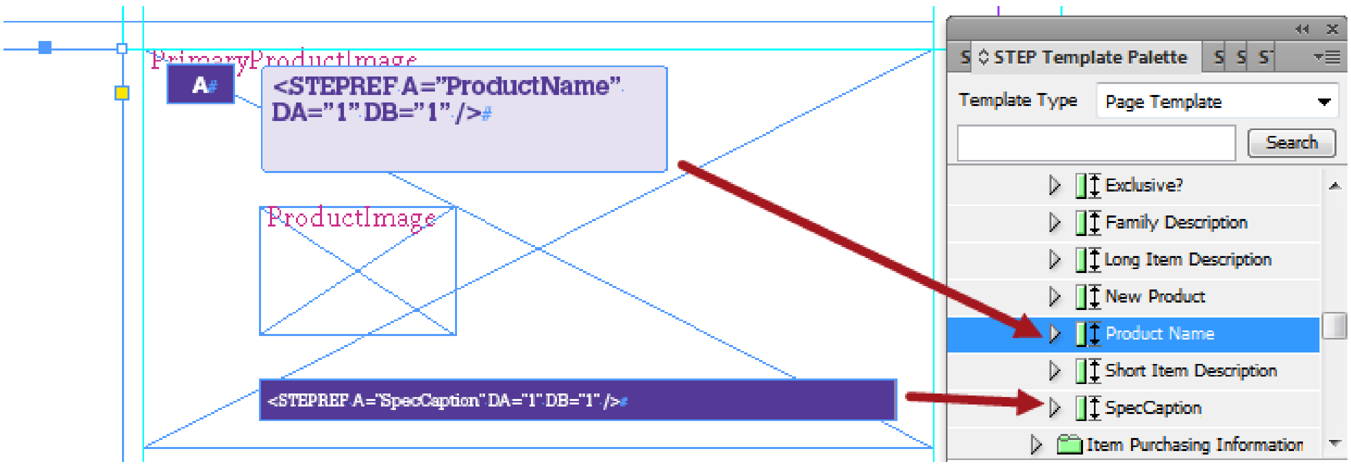


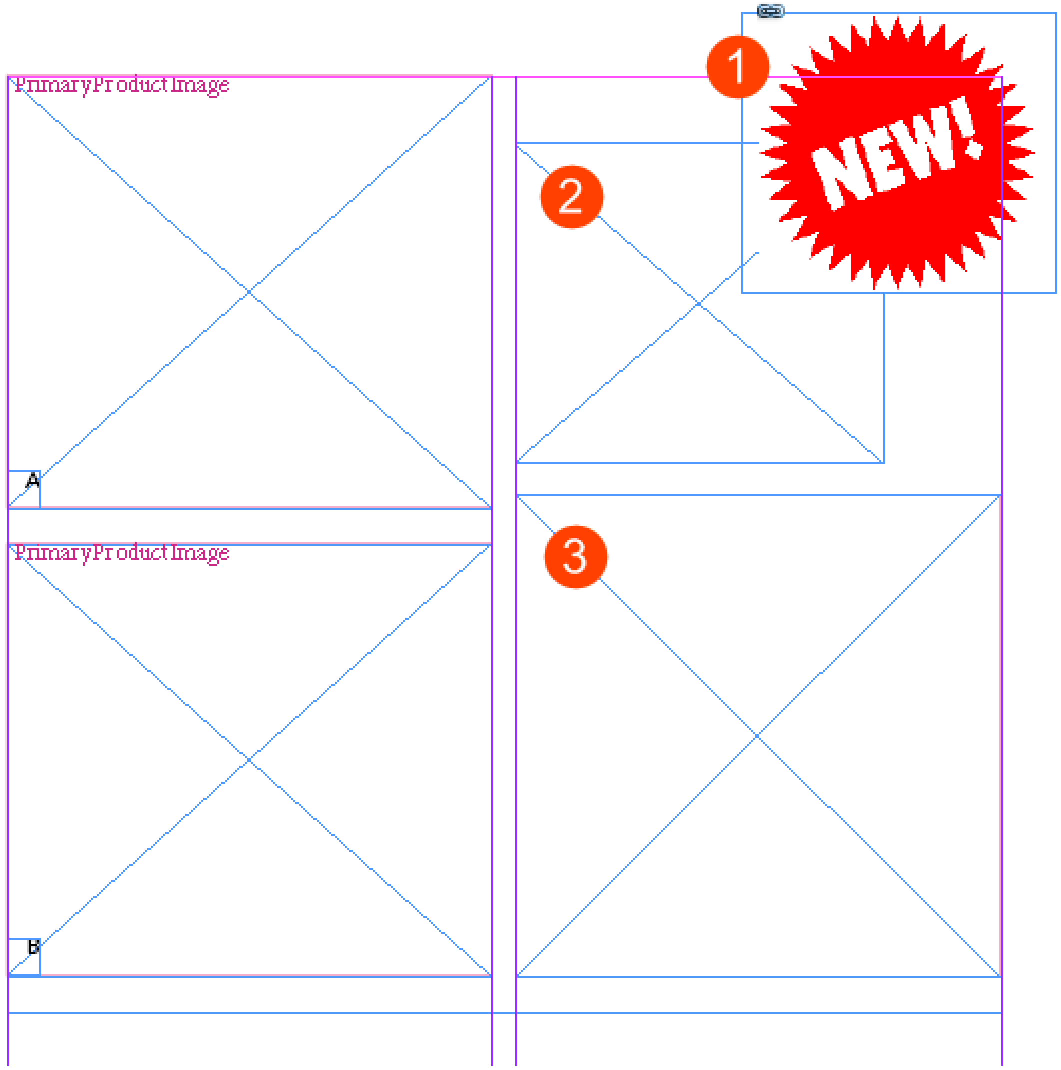
Image and Product Frames Without Key Letters

In addition to the frame types required for Galley layouts, other frame types may be 'nested' within the page to allow expanded layout flexibility.

The following Galley template example shows three additional frame types:

1. Static

2. Image (no Key Letter)
3. Product



Static Frames

Static Frames are used for content that should never be manipulated in the workbench Plan view. They typically contain logos or brand images.

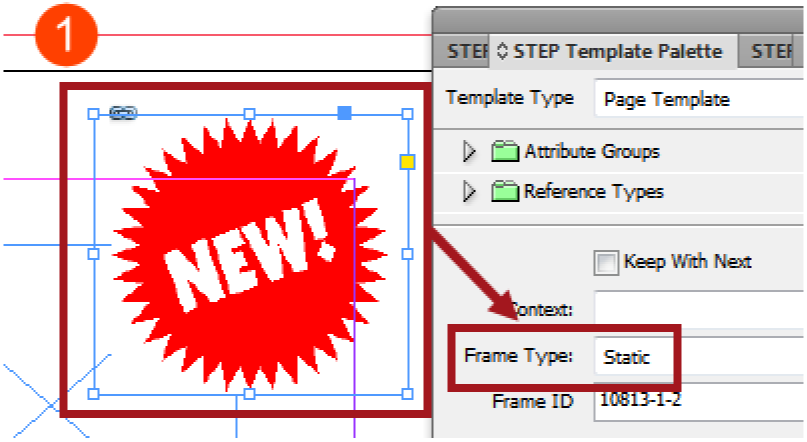
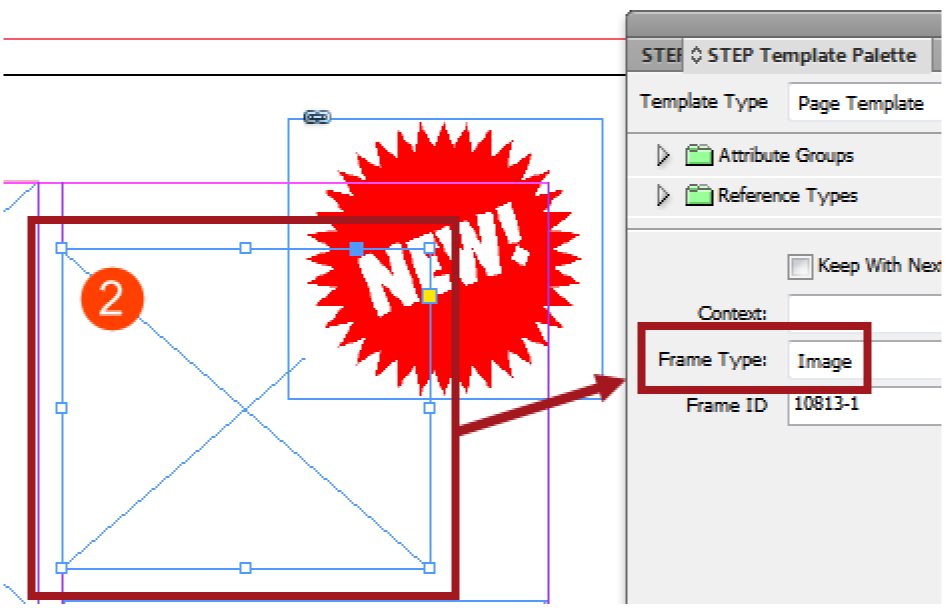


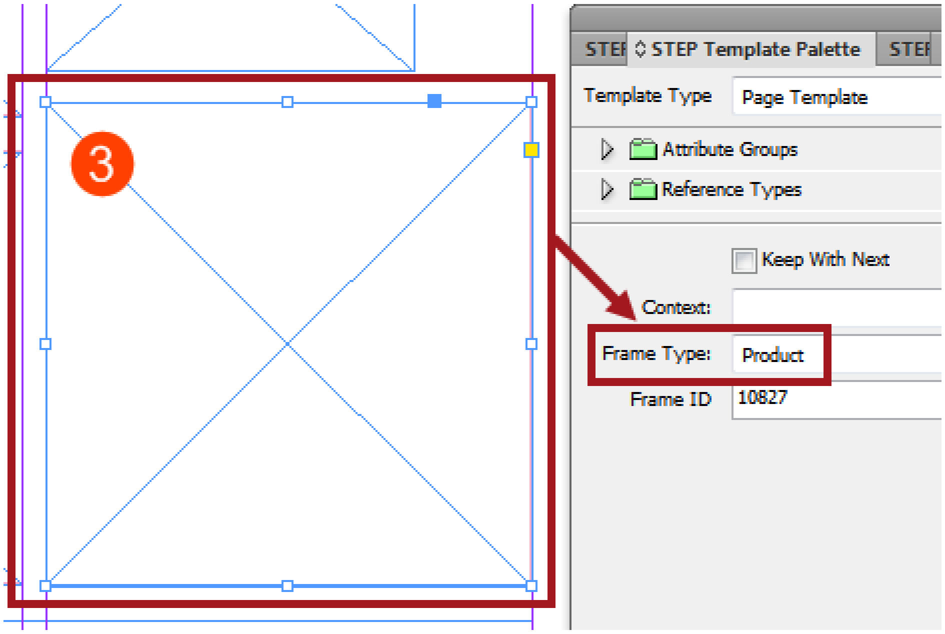
Image Frames

Image Frames are not connected to Key Letters and are intended to contain image assets only.



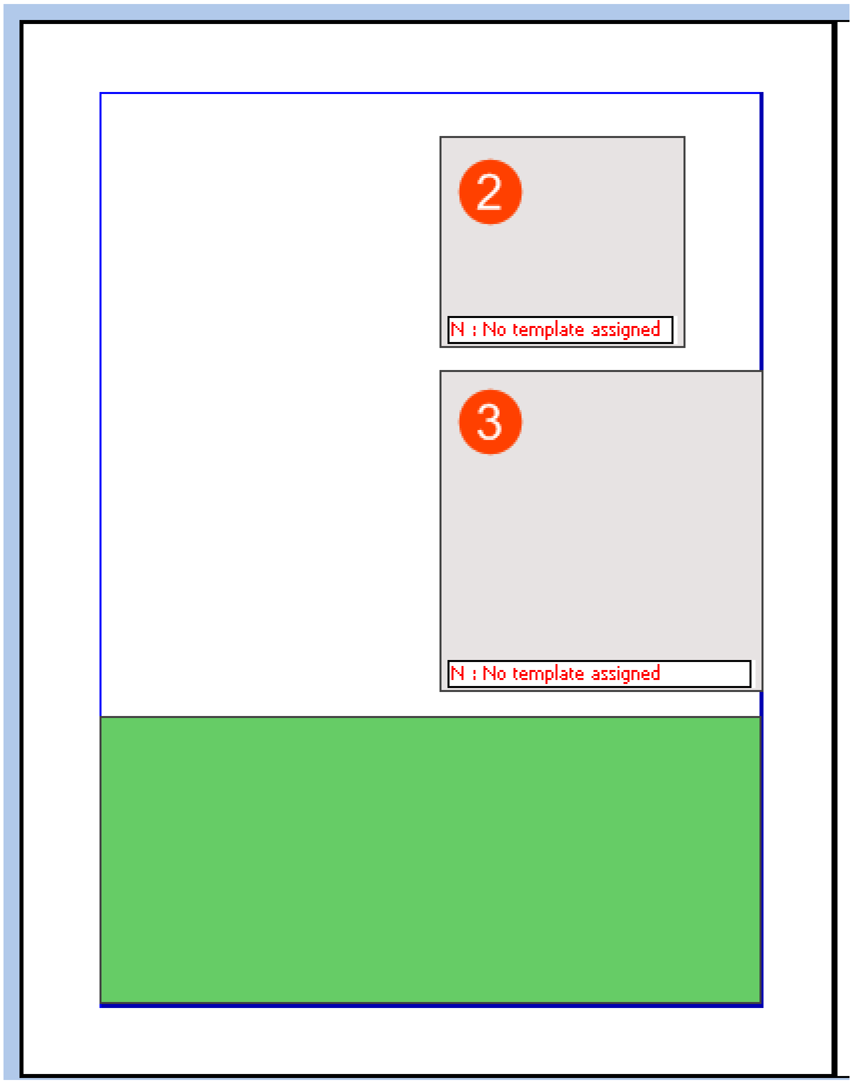
Product Frames

Product frames allow 'nesting' of content on a page, allowing a different, non-Galley product template to be linked to the frame.

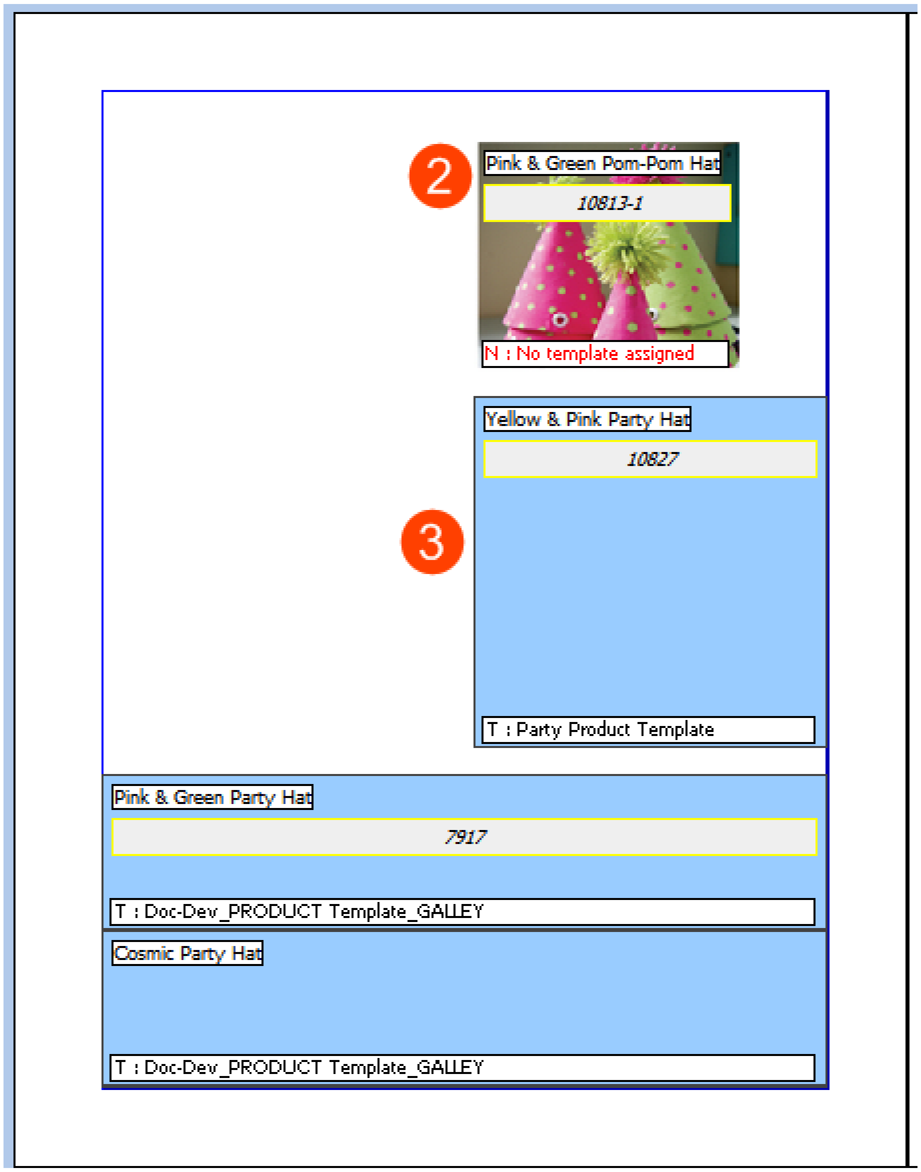


Working With Optional Galley Page Template Frame Types in the Workbench

To prevent manipulation by users in the workbench, **Static Frames** do not appear in the Plan view. Numbers 2 and 3 on the below screenshot show the product and image frames from the previous example.



The following screenshot shows the Plan with an image object linked to the **Image Frame** and a product object linked to the **Product Frame**. Note that the product template applied to the product frame is a non-Galley template.



The document described in this example will appear as follows when mounted in InDesign:

Note: To apply more advanced product template-style parameters to image and text frames on Galley page templates (e.g., image alignment settings and Delete Before / Delete After text options), you can temporarily change the Template Type to 'Product Template' in the STEP Template Palette. Once your template is complete, you must change the Template Type back to 'Page Template' before saving it back to STEP.

Pagination Rules for Flatplanner

A pagination rule is a rule that controls how, when, and where product presentations are added to a page.

A pagination rule consists of one or more conditions and an action that takes place if the condition is met. You also have to specify detailed criteria for some of the conditions and actions.

Pagination Rule Groups

Two pagination rule groups are available in Flatplanner:

- Object layout
- Set publication template spread index

Pagination Tab

You add pagination rules on the Pagination tab, which is available when you select a publication, section, or subsection in the tree.

On the Pagination tab, there is a table which displays all rules that are applied to a publication. You get an overview of all conditions and actions, and you can see where in the publication structure the rules are defined.

If there all rules with in a rule group are overridden, they are displayed in green. If you have edited the action of an inherited rule, it is displayed in red.

Pagination Rule Inheritance

Pagination rules are inherited from higher levels to lower levels. Rules that are applied at lower levels take precedence over rules applied at higher levels. So if you have applied a rule at publication level it is inherited to sections and subsections, but rules applied at section or subsection level takes precedence over the inherited rule.

Important: All rules within a pagination rule group are effected when your create a local rule. Therefore, if you make changes at publication level, the changes are not inherited by lower level sections and subsections.

Pagination Rule Evaluation

Pagination rules are evaluated one by one in the list from top to bottom. When the condition of a rule evaluates to **True**, the associated action is then evaluated. The layout of a page is decided by the sum of all conditions with actions that evaluate to true.

Note: The order of evaluation means that one action can override an action associated with a rule further down in the list. Therefore, you should always specify the rule with the more general rule first and the most specific rule last.

To Change the Evaluation Order of Pagination Rules

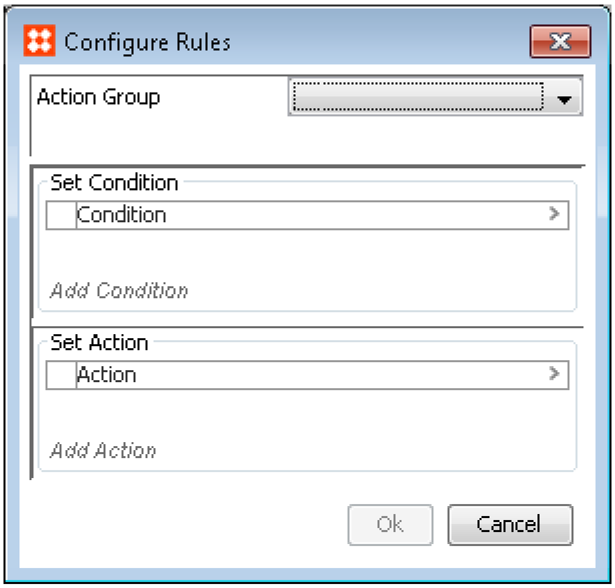
- You can change the order of evaluation by clicking the rule you want to move, and then drag and drop it to its new position in the list.

Adding Pagination Rules in Flatplanner

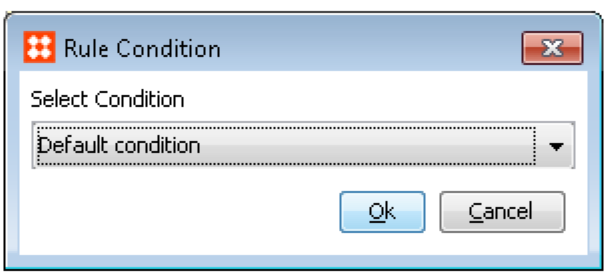
To add a pagination rule, use the following steps.

To Add a Pagination Rule

1. In the **Tree**, expand the publication hierarchy, and then click the publication that you want to add a pagination rule to.
2. Click the **Pagination Rules** tab.
3. Click **Add Rule Group**. The **Configure Rules** dialog appears where you can define the rules.

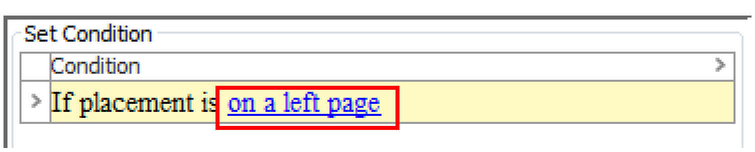


4. From the **Action Group** list, select the rule group that you want to apply.
5. In the **Set Condition Area**, click **Add Condition**. The **Rule Condition** dialog appears.

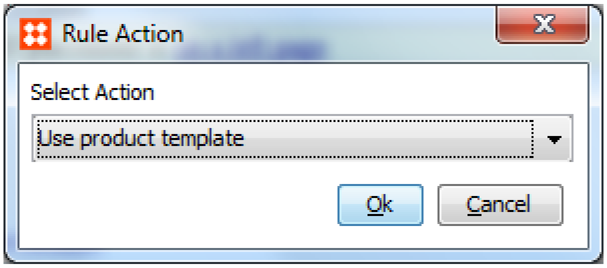


6. In the **Select Condition** list, select the relevant condition, and then click **OK**.

   Some conditions can be limited further. Click the blue, underlined text to enter the criteria that determine when the condition should be applied.

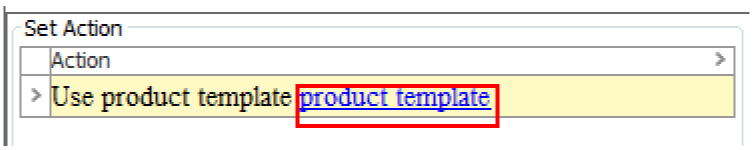


7. In the **Set Action** area, click **Add Action**. The **Rule Action** dialog appears.



8. In the **Select Action** list, select the relevant action, and then click **OK**.

   Some actions can be limited further. Click the blue, underlined text to enter the criteria that further defines the action.



To Add Local Pagination Rules

It is possible to add local rules to a rule group at a lower level in the tree.

- if you add a rule to a group with inherited rules, a message is displayed asking if you want all rules in that group to become local. Click **Yes** to make all rules local.

All rules in the rule group are then displayed in green in the list. As a result, the rules will no longer inherit changes made to the rules at a higher level.

Tip: To remove local rules, remove all the rules in a group one by one. The rule group reverts back to the inherited rules.

Editing Pagination Rules

You can edit both local and inherited pagination rules. On local rules, you can change both conditions and actions, but on inherited rules you can only change the actions.

To Edit Pagination Rules

1. In the **Tree**, click the publication, section or subsection whose rule you want to edit.
2. On the **Pagination Rules** tab, click the **arrow** icon next to the rule you want to edit, right-click, and then select **Edit Pagination Rule**. The **Configure Rules** dialog is displayed.
3. Make the desired changes, and then click **OK**.

If you have changed the action on an inherited rule, it is now displayed in red in the list on the Pagination Rules tab.

Note: You can not edit or add or delete conditions on inherited rules. Also, you can not add or remove actions from inherited rules.

To Override Inherited Rules

To make all rules within a rule group local, you can override inherited rules. If local inherited rules are overridden, changes made at higher levels are not inherited to the level where the rules have been overridden.

1. In the **Tree**, click the publication, section or subsection whose rules you want to override.
2. On the **Pagination Rules** tab, click the **arrow** icon next to the rule you want to edit, right-click, and then select **Override Rules**.

The rules are overridden and displayed in green in the list. You can now edit the actions and conditions on the rules and you can edit and remove rules from the rule group.

To Remove a Pagination Rule

1. In the Tree, click the publication, section or subsection that you want to delete a rule from.
2. On the **Pagination Rules** tab, click the **arrow** icon next to the rule you want to edit, right-click, and then select **Remove Pagination Rules**.

To Copy Pagination Rules

It is possible to copy a rule from one rule group to another. Rules can be copied to and from publications, sections and subsections. The paste destination does not have to be of the same type as the source.

1. In the **Tree**, click the publication, section or subsection that holds the rule you want to copy.
2. On the **Pagination Rules** tab, click the **arrow** icon next to the rule you want to copy, right-click, and then select **Copy Pagination Rules**.
3. Om the Tree, click the destination publication, section or subsection.
4. On the **Pagination Rules** tab, click the **arrow** icon of an existing rule, right-click, and then select **Paste Pagination Rules**.

Note: If you paste a local rule into a group with inherited rules all rules in the group become local.

Pagination Rule Actions

For each rule group, a number of actions are available.

Object Layout Actions

Action	Description
Keep user assigned template	Uses the already assigned template.
Pickup document	Uses a product layout from a publication that you select.
Use default product	Uses the default product presentation that has been assigned to the product.

Action	Description
presentation	
Use product template	Uses a specific product template that you select from a list of available templates.

Set Publication Template Spread Index Actions

Action	Description
Set publication template spread index	Defines which spread within a publication template to use.

Pagination Rule Conditions

The following table describes the pagination rule conditions that are available in the Flatplanner

Condition	Description
Default condition	The rule is always applied. There are no specific conditions that must be met.
If first in section	The rule is applied if the object is the first object in the section specified in the condition.
If frame dimensions fit product template min/max dimensions	The rule is applied if the width or the height of the frame meets the conditions you specify.
If the object type is	The rule is applied if the object is of the same object type as specified in the condition.
If the object is	The rule is applied if the object is the same as the object specified in the condition.
If the product attribute value equals	The rule is applied if the product attribute value is the same as the value specified in the condition.

Pagination Rule Groups

There are two pagination rule groups that you can apply in Flatplanner. For each group, there are a number of actions available. For more information about actions, see Pagination Rule Actions.

Object Layout

Use the object layout rule to specify the layout of an object on a page.

The following conditions are available.

- Default conditions
- If first in section
- If frame dimensions fit product template min/max dimensions
- If the object type is
- If the object is
- If the product attribute value equals

Set Publication Template Spread Index

Use the set publication template spread index to specify which publication template spread number to use in the mount process.

The following conditions are available.

- Default conditions
- If object type is
- If the product attribute value equals

Flatplanner Baskets

Flatplanner **baskets** are a way to store and organize products and images (and less commonly, classifications) that will be linked to frames on Flatplanner planned pages throughout a publication. Baskets can be accessed at the publication, section, and spread level of publications.

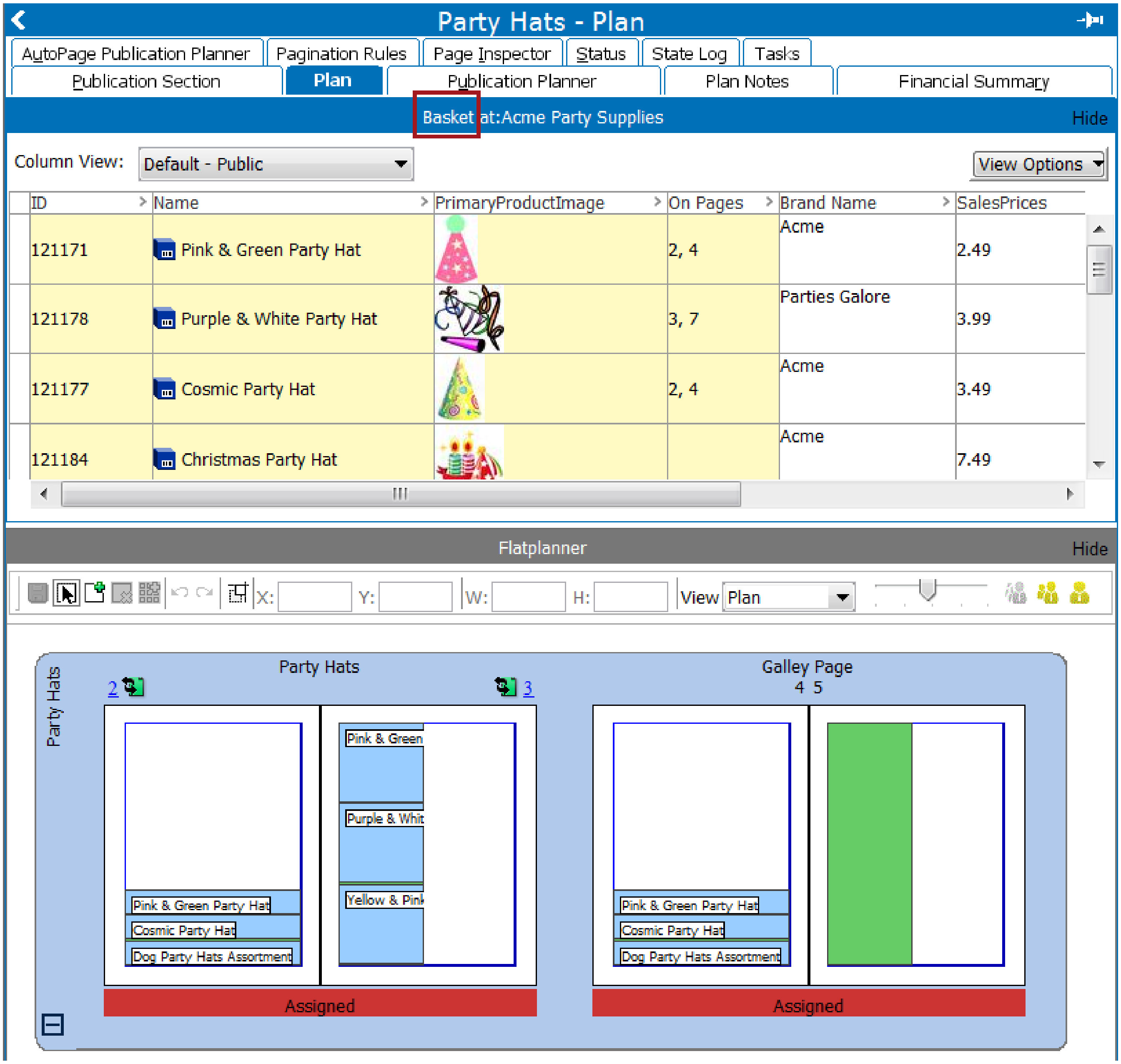
The most common use for Flatplanner baskets is the ability to view the assortment of products that have been selected for your spread, section, or publication, then drag these objects from the basket onto the frames on your Flatplanner planned pages.

Baskets are optional, as objects may be linked directly to planned page frames by a number of different methods: directly from the Tree, from a listing of search results, from the contents of a collection, and through a Flatplanner Excel or Publication Excel import. However, Flatplanner baskets are a convenient visual tool for users who plan pages in STEP, as basket views can be configured to display image thumbnails, attribute values, commercial data (such as pricing), and other useful information about the product selection.

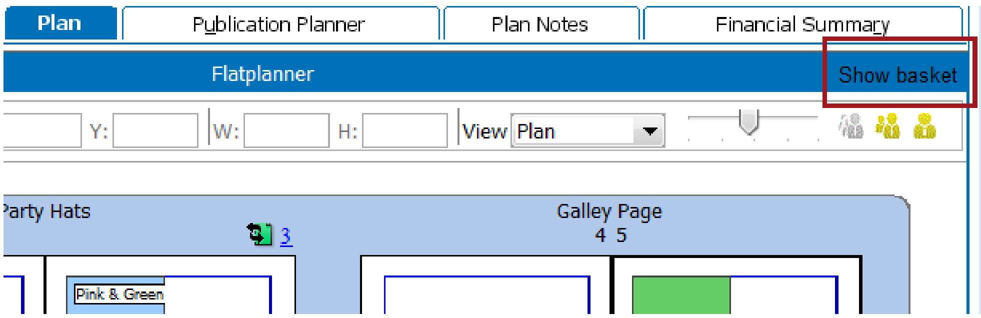
Objects linked to baskets at higher levels in the publication hierarchy are inherited by the baskets of child sections and spreads, following the same manner of inheritance as that of other hierarchies in STEP (for example, how attributes and references that are linked to higher levels in the product hierarchy are inherited by child products).

Viewing a Basket

Baskets are viewed from the **Plan** tab on publications, sections, and spreads.



- To open the basket, click **Show basket** in the upper right corner of the basket window.



- To hide the basket, click **Hide** in the upper right corner of the basket window (visible in the first screenshot in this topic).

Adding Objects Manually to Baskets

Products, assets, and classifications can be added to Flatplanner baskets through both manual and automated methods. The following instructions outline how to add objects to Flatplanner baskets manually: from the Tree, from search results, and from collections.

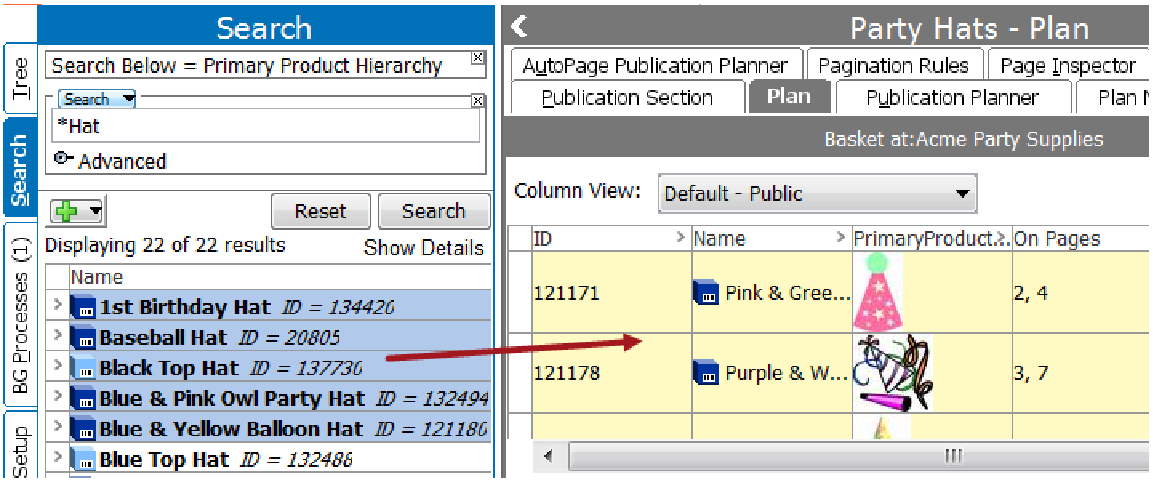
For all of the following methods, the relevant basket must be open (unhidden) and the **Plan** editor must be pinned to the window by clicking the thumb pin icon in the upper left corner.

To Add Objects From the Tree

1. In the Tree, locate the relevant publication, and then navigate to the level of the publication that contains the basket to which you would like to add objects. (This is typically a section or spread, but could also be at the top publication level.)
2. Click the **Plan** tab.
3. Click **Show basket** to make the basket available.
4. Ensure that the editor is locked by clicking the thumb pin icon in the upper right corner of the Plan window.
5. In the Tree, navigate to the object(s) that you want in your basket.
6. Select one or more objects, then hold down the left mouse key and drag the object(s) into the basket. To select multiple objects, press Ctrl or Shift while making selections.

To Add Objects from a Search Result

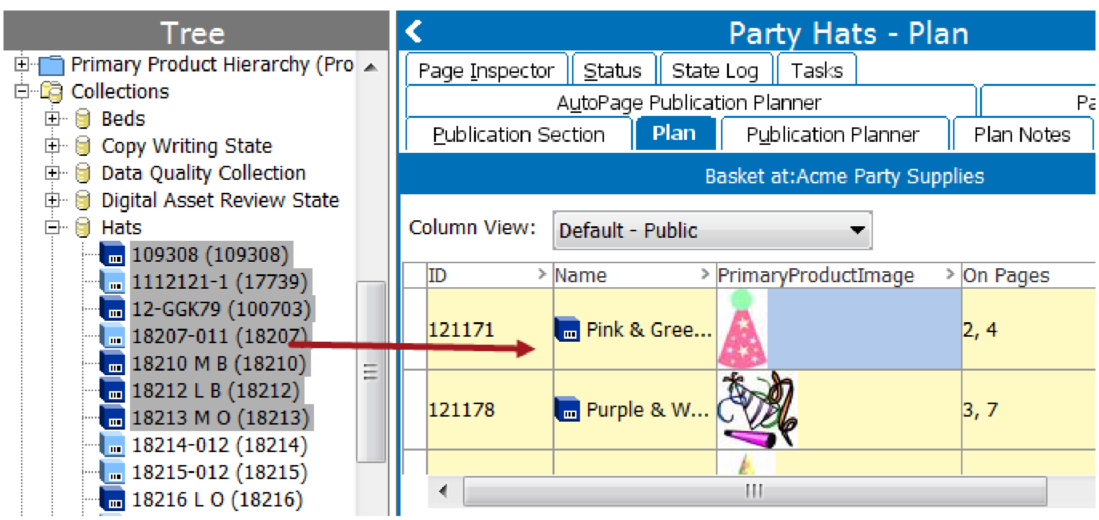
1. Follow steps 1-4 from the previous section to locate, open, and pin the relevant basket.
2. Click on the Search tab, make your selections, and then click **Search**.
3. Select one or more objects, then hold down the left mouse key and drag the object(s) into the basket. To select multiple objects, press Ctrl or Shift while making selections.



For more information on how to conduct searches in the STEP Workbench, see the **Search Overview** section of the **STEP User Guide** / **Getting Started** documentation.

To Add Objects from a Collection List

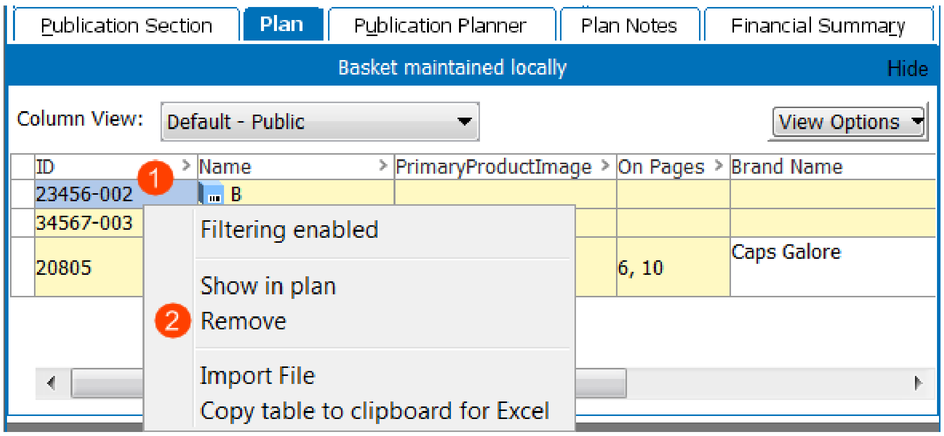
1. Follow steps 1-4 from the 'To Add Objects From the Tree' section above to locate, open, and pin the relevant basket.
2. In the Tree, navigate to the relevant collection and expand it to view its contents.
3. Select one or more objects, then hold down the left mouse key and drag the object(s) into the basket. To select multiple objects, press Ctrl or Shift while making selections.



For more information on how to create and work with collections, see the **Collections** section of the **STEP User Guide** / **Getting Started** documentation.

Removing Objects from Baskets

1. Select the row(s) containing the products that you would like to remove by clicking the cells under the ID column. Rows may be multi-selected by holding Shift or Ctrl while making selections. (**Note:** Cells in any column may be clicked to select rows, though using the ID column is the most logical, since it is the first column and also contains no hyperlinks.)
2. Right-click and select Remove.



Importing Objects Into Baskets

Objects can be imported into Flatplanner baskets using the following file formats:

- CSV
- Plain text (.txt)
- Publication Excel
- STEPXML

The following sections outline the steps for each method. This topic assumes that you have already navigated to the relevant basket in your publication and have the basket open.

CSV

Two methods exist for importing objects to Flatplanner baskets using CSV files. The first is for loading a sheet containing objects that are all of the same 'super type'—product, asset, or classification. The second is for loading a sheet that contains an assortment of super types.

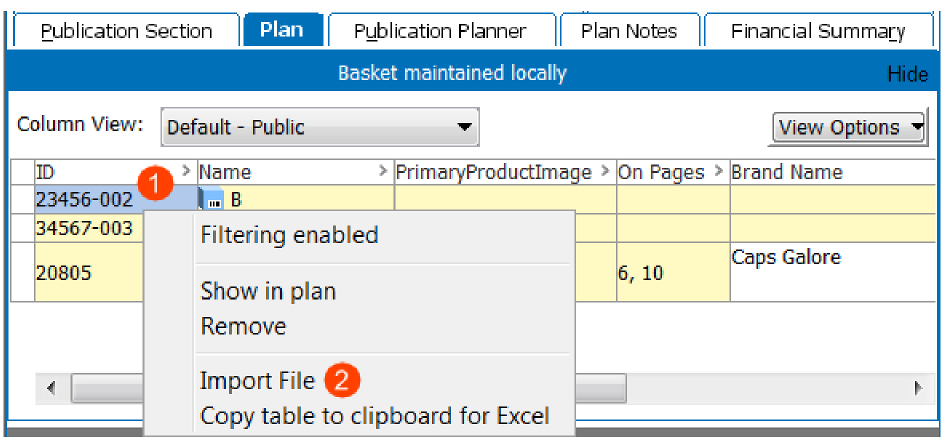
Objects of the Same Super Type

To load a CSV file composed of objects of the same super type, a one-column CSV file containing a list of object IDs is used.

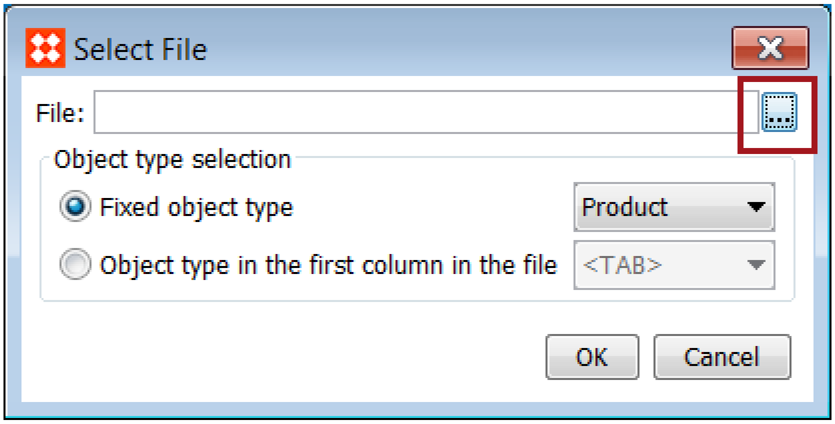
	A
1	20805
2	114509
3	181198
4	20803
5	179857
6	179858
7	134420
8	121177
9	121171
10	121192
11	138925

To load this file, follow these steps:

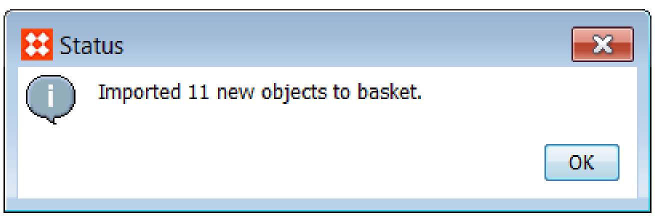
1. Right-click anywhere inside of the basket and select **Import File**.



2. In the **Select File** dialog, click the ellipsis button **(…)**.



3. In the **Open** dialog, navigate to the relevant CSV file, then click **Open**.
4. In the 'Object Type selection' area of the **Select File** dialog, choose **Fixed object type**, then choose the appropriate super type from the dropdown list (Product, Classification, or Asset).
5. Click **OK**. A **Status** dialog displays.
6. If the load is successful, a message appears in the **Status** dialog box with the number of new objects that were loaded. If the load was unsuccessful, an error message appears instead. (For example, an error may appear if the 'fixed object type' file contains different super types, or if the system cannot locate an object in the file.)



7. Click **OK** to close the Status dialog. The objects from the imported file are displayed in the basket.

Objects of Different Super Types

To load a CSV file composed of objects of different super types, a two-column CSV file is used that contains super type identifiers in the first column and a list of corresponding object IDs in the second column. The first column identifies the objects' super type with a value of 'product,' 'asset,' or 'classification.'

	A	B
1	product	134420
2	product	20805
3	product	121177
8	product	121192
9	product	179857
10	product	179858
11	product	138925
12	asset	107625
13	classification	8735

To load this file, follow these steps:

1. Follow steps 1-3 from the previous section on uploading single-column CSV files.
2. In the 'Object Type selection' area of the **Select File** dialog, choose **Object type in the first column in the file**, then select the appropriate delimiter from the dropdown list. Available delimiters in the 'Object type in the first column in the file' dropdown list are <TAB>, <SPACE>, comma, semicolon, and pipe.
3. Click **OK**. A **Status** dialog displays.
4. If the load is successful, a message appears in the **Status** dialog box with the number of new objects that were loaded. If the load was unsuccessful, an error message will appear instead. (For example, an error may appear if no super types are listed in the first column, or if the system cannot locate an object in the file.)
5. Click **OK** to close the Status dialog. The objects from the imported file are displayed in the basket.

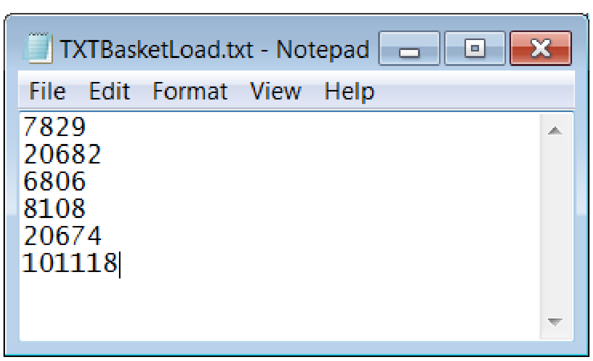
Plain text (.txt)

The steps for loading plain text files to baskets are nearly identical to those of uploading CSV files.

Note: Imported text files must be true plain text. The import will not work with document types that contain rich text elements (for example, Microsoft Word documents).

Objects of the Same Super Type

To load a list of objects of the same super type (for example, an assortment of products), a plain text file containing a list of object IDs is used.


TXTBasketLoad.txt - Notepad

File Edit Format View Help

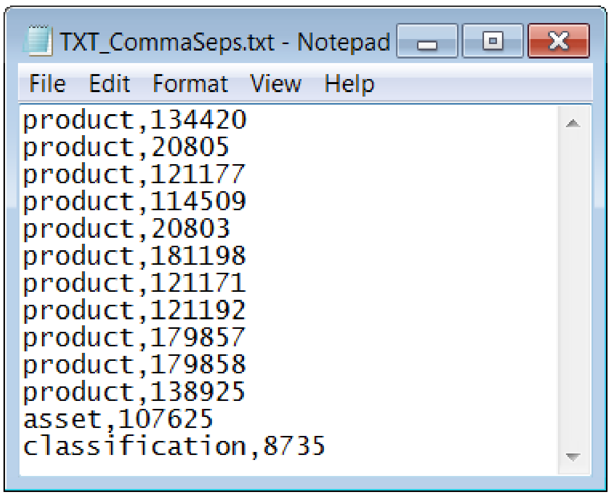
7829
20682
6806
8108
20674
101118

To load this file:

1. Follow steps 1-3 from the previous section on uploading single-column CSV files, except you will open a .txt file instead of a CSV file in step 3.
2. In the 'Object Type selection' area of the Select File dialog, choose **Fixed object type**, then click **OK**.
3. The **Status** dialog displays with the number of new objects that were loaded to the basket. (If the load was unsuccessful, an error message appears.)
4. Click **OK** to close the Status dialog. The objects from the imported file are displayed in the basket.

Objects of Different Super Types

To load a list of objects of different super types, a plain text file containing a list of super types and object IDs is used. The super type and ID are separated by a delimiter (for example, a tab or comma).



To load this file:

1. Follow steps 1-3 from the previous section on uploading single-column CSV files, except you will open a .txt file instead of a CSV file in step 3.
2. In the 'Object Type selection' area of the Select File dialog, choose **Object type in the first column in the file**, then select the relevant delimiter from the dropdown list and click **OK**.
3. The **Status** dialog displays with the number of new objects that were loaded to the basket. (If the load was unsuccessful, an error message appears.)
4. Click **OK** to close the Status dialog. The objects from the imported file are displayed in the basket.

Publication Excel

A Publication Excel sheet may also be used to load objects into the baskets of an existing publication. The sheet needs the following columns, at minimum, to successfully import objects: PublicationID, SectionID, BasketObjectID, and BasketObjectType.

	A	B	C	D
1	PublicationID	SectionID	BasketObjectID	BasketObjectType
2	110642			
3		124278		
4			109308	Product
5			17739	Product
6			18212	Product
7			18213	Product
8			Tire Kit12	Asset
9			Icons	Classification
10		110016		
11			20805	Product
12			134420	Product
13			121177	Product
14			121171	Product
15			121192	Product
16			138925	Product

To load the file, right-click on a publication group and select **Import Publication...**. Alternately, you may select File > Import > Data. The ensuing steps will be the same as those for uploading any Publication Excel document.

For complete instructions on loading Publication Excel files, as well as additional information about how to use them (for example, how to create new publications), see the **Importing Flatplanner Publications in Excel** section of the **Flatplanner** documentation and the **Importing a Publication Excel Sheet** section of the **STEP'n'design** documentation.

STEPXML

Typically, users will not manually create a STEPXML file for the sole purpose of importing objects into Flatplanner baskets. STEPXML files are most commonly used for the export / import of entire publications. However, objects can be loaded to baskets in pre-existing publications through a STEPXML import as long as the IDs for the existing publication (and sections, if section-level baskets are being loaded), are present in the file.

The following STEPXML snippet shows the minimum amount of information needed to load a selection of products, assets, and classifications to a basket at the section level of an existing publication.

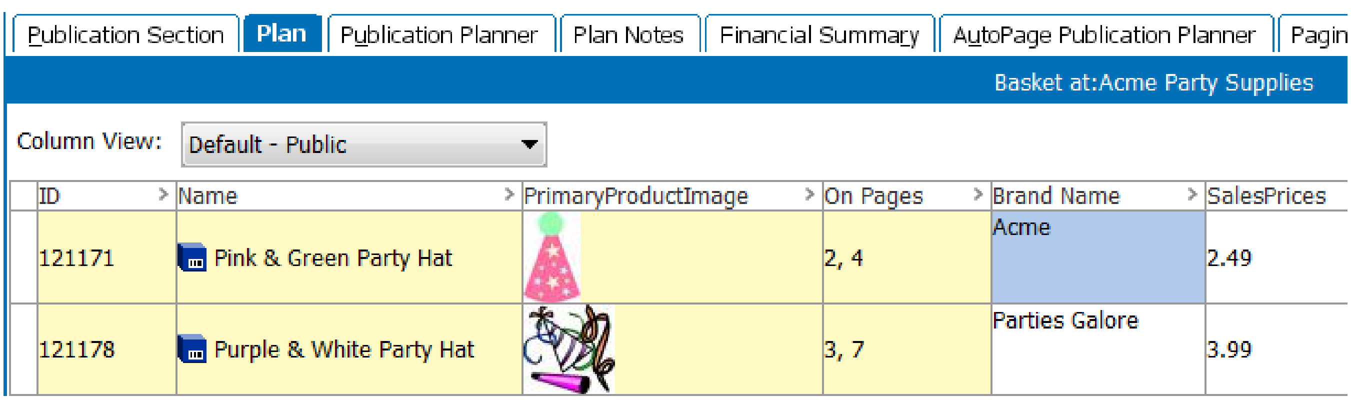
```
<STEP-ProductInformation ContextID="defaultcontext" WorkspaceID="Main">

<PublicationGroups>

<PublicationGroup UserTypeID="Publication group root" ParentID="Publication hierarchy root"
ID="108198">

<Name>Flatplanner Publications</Name>

<Publication UserTypeID="Default publication type" DTPType="InDesign" ParentID="108198"
ID="110642">

<Name>Christmas Catalog</Name>

<PublicationSection ID="124278" UserTypeID="Section">

<Name>Decorations</Name>

<Basket>

<ProductBasketLink ProductID="109308"/>

<ProductBasketLink ProductID="17739"/>

<ProductBasketLink ProductID="100703"/>
```

```
<ProductBasketLink ProductID="18207"/>
<ProductBasketLink ProductID="18210"/>
<ProductBasketLink ProductID="18212"/>
<ProductBasketLink ProductID="18213"/>
<ProductBasketLink ProductID="18214"/>
<AssetBasketLink AssetID="Ornaments"/>
<ClassificationBasketLink ClassificationID="Icons"/>
</Basket>
</PublicationSection>
</Publication>
</PublicationGroup>
</PublicationGroups>
</STEP-ProductInformation>
```

For more information on importing STEPXML files, see the **STEPXML Format** section of the **Data Exchange** documentation.

Editing Data in Baskets

It is possible to edit attribute values and commercial data directly in a basket. Attributes are only editable if the attributes are valid for the product. Commercial data is only editable if the relevant commercial list is valid for the publication and has been mapped to the publication version that you are working in. As with editing values in any other location in the workbench, you must have the appropriate user permissions in order to edit values in the basket.



1. In the Tree, expand the publication hierarchy.
2. Click the relevant publication and expand the hierarchy.
3. Click a publication, section, or a spread.

4. Select the **Plan** tab.
5. Click **Show Basket** to make the basket available.
6. Click the field in which you want to add or change the value.
7. Enter the new value.
8. Click outside of the field. The value is saved.

Working with Frames in Publications, Sections, and Spreads

You can edit and add frames and content.

- To edit frames, in the **Tree**, select the preferred publication, section, or spread, and then click the **Plan** tab.

To Add a Frame

- To add a frame to a page, select the **Add Frame** tool in the tool bar. Drag an outline of the frame with the cursor while holding down the left mouse button, and then release the mouse button.

To Insert Frames on a Grid

1. To quickly create many frames in a grid, select a page, then click **Insert frames on a Grid** in the tool bar. A dialog box appears:
2. In the **Across** field, enter the number of rows of frames you want to be inserted.
3. In the **Down** field, enter the number of columns of frames you want to be inserted.
4. In the **Vertical Gap** field, enter the distance between the rows of frames.
5. In the **Horizontal Gap** field, enter the distance between the columns of frames.
6. Click **Enter**. The frame grid is inserted on the selected page.

To Select Frames

- To select a frame, click the **Select** tool in the tool bar and click a frame.
- To select multiple frames, hold down the **Shift** key, and click the frames you want to select.

To Delete Frames

- To delete a frame, select the frame with the **Select** tool and then click the **Delete frame** button in the tool bar. You can also select multiple frames and delete these frames the same way.

To Move Frames

- To move a frame, choose the **Select** tool in the tool bar, and then drag and drop the frame. You can also set the X and Y position of one or more selected frames by entering a new value in the **X Position** field and **Y Position** field.

To Resize Frames

- To resize a frame, choose the **Select** tool in the tool bar, select the frame, and then drag the handles on the frame border. Alternatively, enter a new value for one or more selected frames in the **Width** and **Height** fields in the tool bar.

To Enable Snap Positioning

When you move frames on the page using drag and drop, it can be useful to enable Snap Positioning. This makes the moved frame snap to a position when you release the mouse button. This way you can easily place frames in the same X and Y positions on the page. The snap positions are :

- Margin borders: Upper and right hand side border
- Frame borders: All borders

Note: Only the upper frame border and the left hand frame border of the frame that is being moved snaps.

To Change the Order of Frames

Frames are placed on the page in a specific order relative to each other. Adding a new frame places that frame on top of other frames. This is only noticeable if frames overlap each other.

If you want to change the ordering of frame layers, right-click the frame, select **Layers**, and select one of the four options:

- **Bring to front**: Brings the selected frame to front.
- **Send to back**: Sends the selected frame to the back.
- **Bring forward**: Brings the selected frame one level forward.
- **Send backward**: Sends the selected frame one level backward.

Note: Moving a frame from one page to another brings the frame layer to a front position.

To Move Content Between Frames

You can move content such as products and images from one frame to another.

- Select the Select tool, in the preferred frame, click the object you want to move, and then drag and drop the object to the desired frame.

To Remove Content from a Frame

- Right-click the desired frame, and then click **Remove Content**.

To Change Frame Properties

To view and maintain details of a frame, select the frame, right-click and select **Frame Properties**. A dialog box appears with the following options.

- **Frame ID**: Editable field that shows the ID of the selected frame.
- **X Position**: Editable field that shows the horizontal position of the selected frame.

- **Y Position**: Editable field that shows the vertical position of the selected frame.
- **Width**: Editable field that shows the width of the selected frame.
- **Height**: Editable field that shows the height of the selected frame.
- **Layer**: Editable list that defines the frames order relative to other frames on the page. '0' means that the frame is in the back.

To View Frame IDs

Each frame on a page template has an ID.

- To view the ID of the frames on a page, right-click the page and select **Show Frame IDs**. A small box containing the IDs appears in all the frames on the spread.

To Change Frame IDs

- To change the ID of a frame, right-click the frame and select **Frame Properties**. A dialog box appears where you can change the ID.

To Zoom In and Out

- To zoom in, right-click the page and select the **Zoom in** option. To zoom out, right-click the page and select the **Zoom out** option.

To Change the Size of a Frame

It is possible to resize a frame on a spread.

To Copy and Paste Pages

It is possible to copy and paste a page including frames:

1. Right-click the page you want to copy and select **Copy Page**.
2. Right-click the page you want to paste the copied page to and select **Paste Page**.

The copied page including frames is pasted.

Note: A warning appears if you try to paste a left-hand page to a right-hand page and vice versa.

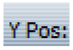
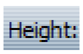
Designing Frames for Publications, Sections, or Spreads

When you apply a template to a publication in the Flatplanner, it comes with a number of predefined frames. However, it is possible to add or change frames on a publication, section, or spread. Use the Designer tool bar on the Plan tab to add and position frames on the page template.

Designer Tool Bar

- To access the Designer tool bar, click a publication, section, or spread in the Tree, and then click the **Plan** tab.

Tool	Description
Save	Used to save all changes
Select	Used to select and move frames and content on the page by dragging them.
Add frame	Used to add new frames by clicking and dragging the mouse.
Delete	Used to delete a frame. Delete is only enabled when one or more frames are selected.
Insert frames on a grid	Used to insert multiple frames in a grid on the page.
Undo	Used to undo your last action.
Redo	Used to redo your last action.
Snap positioning toggle button	Used to enable or disable snapping of frames when they are moved or re-sized.
X Pos	Shows the horizontal position of a selected frame. If more frames are selected, the horizontal position is only displayed if it is the same for all selected frames. To change the horizontal position of a frame, enter a new value in the X position field.

Tool	Description
 Y Pos	Shows the vertical position of a selected frame. If more frames are selected, the vertical position is only displayed if it is the same for all selected frames. To change the vertical position of a frame, enter a new value in the Y position field.
 Width	Shows the width of a selected frame. If more frames are selected, the width is only displayed if it is the same for all selected frames. To change the width of a frame, enter a new value in the Height field.
 Height	Shows the height of a selected frame. If more frames are selected, the height is only displayed if it is the same for all selected frames. To change the height of a frame, enter a new value in the Height field.

Adding Products and Images to a Page

You drag and drop products, images, and classifications to a page from:

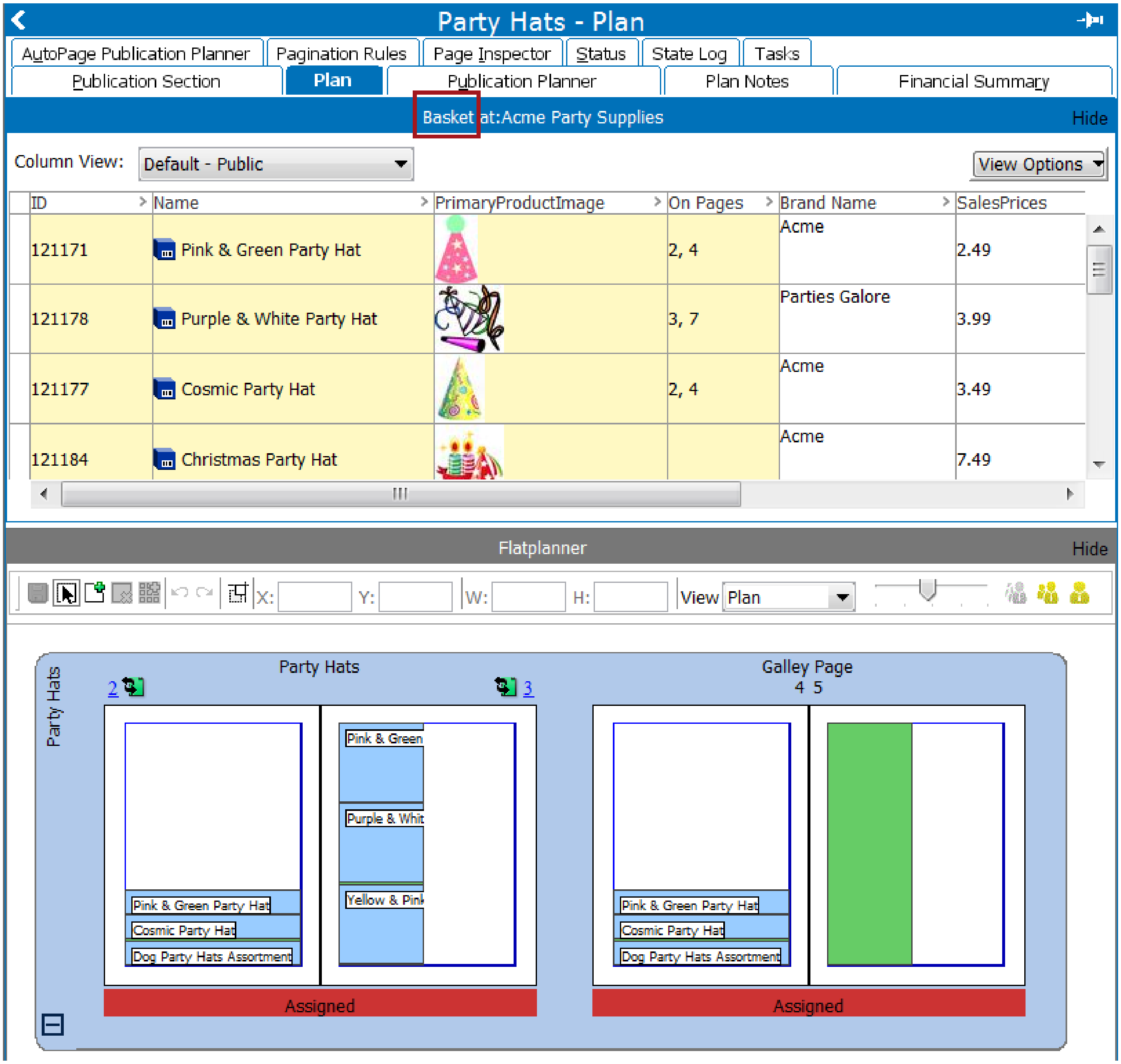
- Basket
- Tree
- Collection List
- Search Result

This topic describes the manual methods for linking objects to Flatplanner frames through dragging and dropping. For information on how to link objects to Flatplanner frames through Excel imports, see E**xporting and Importing Flatplanner Publications in Excel** in the **Flatplanner** documentation.

Dragging and Dropping from the Basket

You can drag and drop products and images from the basket to the Flatplanner.

1. In the Tree, expand the publication hierarchy.
2. Click the relevant **publication** and expand the hierarchy.
3. Click a **publication**, **section**, or a **spread**.
4. Click the **Plan** tab.
5. Click **Show basket** to make the Basket available.



6. Drag and drop the relevant products or images from the basket to the Flatplanner.

Dragging and Dropping from the Tree

You can drag and drop products and images directly from the Tree to the Flatplanner.

1. In the Tree, expand the Classification hierarchy or the Product hierarchy and locate the product or image you want to use.
2. Drag and drop the relevant product or image from the Tree to the Flatplanner.

Dragging and Dropping from a Collection List

You can drag and drop products and images directly from a collection list to the Flatplanner.

1. Ensure that the editor is locked by checking the **Thumb Pin** icon .
2. In the **Tree**, expand the relevant **Collection** hierarchy.
3. Drag and drop the relevant products or images from the collection list to the Flatplanner.

Dragging and Dropping from a Search Result

You can drag and drop products and images directly from a search result to the Flatplanner.

1. Ensure that the editor is locked by checking the **Thumb Pin** icon .
2. In **Search**, define your search criteria and then click **Search**.
3. The search results are displayed in the **Search Result** window.
4. Drag and drop the relevant products or images from the search result to the Flatplanner.

Changing and Reapplying Page Templates

When you first create a publication, you define which page template you want to use in the publication.However, it is possible to change the page template later, and to add different page templates to different sections or spreads in your publication.

You can also reapply a page template to a publication, section or spread.

To Change a Page Template

1. In the **Tree** expand the **Publication** hierarchy, and then expand the relevant publication.
2. Click the relevant publication, section or spread, and then click the **Plan** tab.
3. Right-click a white area in the Promotion Planner, and then select **Set page template**. The **Choose a Page Template** dialog appears.
4. From the list of available templates, choose the preferred template, and then click **OK**.

If you have changed a page template and want to switch back to the original page template, you can reapply the page template.

To Reapply a Page Template

1. In the **Tree** expand the **Publication** hierarchy, and then expand the relevant publication.
2. Click the relevant publication, section or spread, and then click the **Plan** tab.
3. Right-click a white area in the Flatplanner, and then point to **Layout**, and then select **Reapply page template.**

If you have changed the position of frames on a page and you reapply or change the template, the frames on the page are positioned according to the frame positions of the page template.

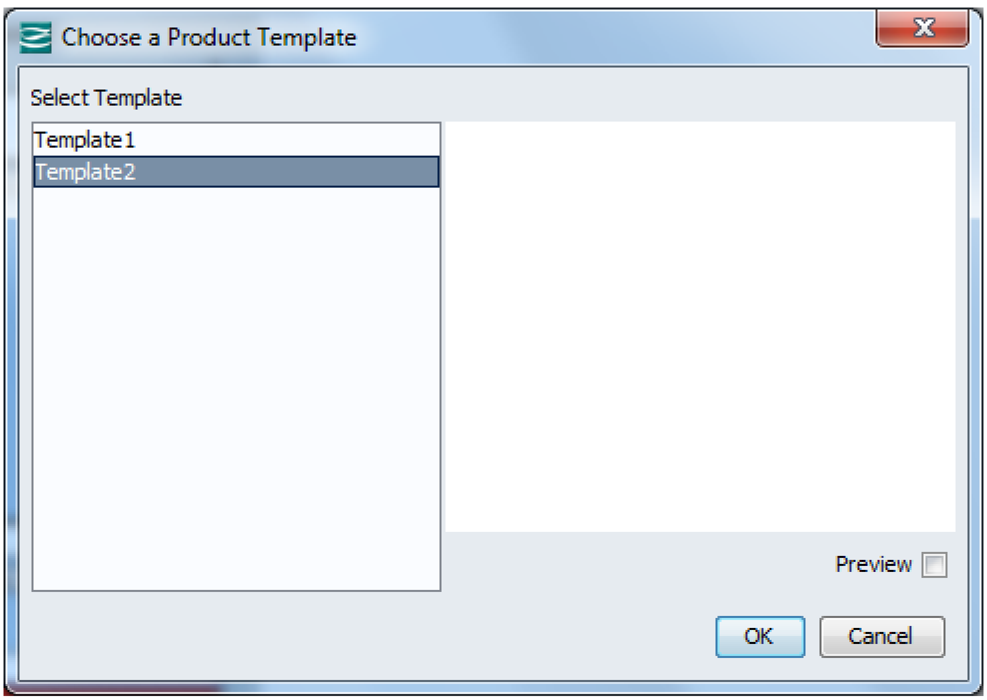
While the position of a frame can change after changing the page template, the content of the frame remains the same. If you have added additional frames with content, those frames will remain on the page as well. However, frames without content are deleted.

Applying Product Templates

You can apply different product templates to different products, and you can change the assigned product template.

To Add or Change a Product Template

1. In the **Tree** expand the **publication** hierarchy, and then expand the relevant publication.
2. Click the relevant spread, and then click the **Plan** tab.
3. Right-click a product (a light blue area) in the Flatplanner, point to **Layout**, and then select **Set product template**. The **Choose a Product Template** dialog appears.
4. From the list of available templates, choose the preferred template, and then click **OK**.



Note: All products must have a product template assigned, otherwise the products will not be mounted.

It is also possible to add the same product template to all products on a page in one go.

To Apply the Same Product Template to all Products on a Spread

1. In the **Tree** expand the **Publication** hierarchy, and then expand the relevant publication.
2. Click the relevant spread, and then click the **Plan** tab.

3. Right-click a white area in the Promotion Planner, point to **Layout**, and then select **Set all product templates**. The **Choose a Product Template** dialog appears.
4. From the list of available templates, choose the preferred template, and then click **OK**.

Removing Product Templates

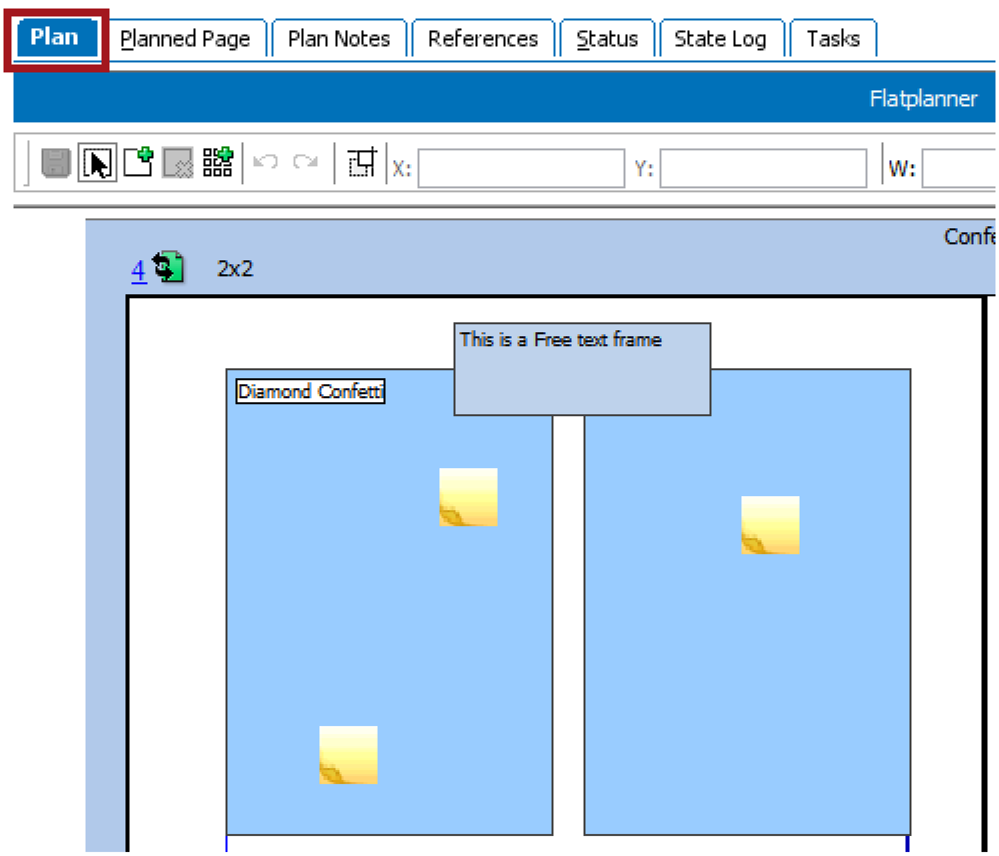
You can remove the assigned product template from a Flatplan frame by following these steps:

1. In the **Tree** expand the **publication** hierarchy, and then expand the relevant publication.
2. Click the relevant spread, and then click the **Plan** tab.
3. Right-click a product (a light blue area) in the Flatplanner, point to **Layout**, and then select **Clear layout**. The template is removed from the frame.

Adding Notes and Free Text

Notes and free text can be added directly to planned pages (spreads) from the **Plan** tab. Notes and free text are useful, for example, when you want to communicate with an art director or designer about the pages.

Notes can be added to planned page spreads in the **Plan** view and **Preview** view. They cannot be added in the **Sticker Book** view.



To Add a Note to a Planned Page

1. In the **Tree**, expand the **Publication** hierarchy, and then click the relevant spread.
2. Click the **Plan** tab.
3. Right-click a frame or the white area of the spread, and then click **Add Note**. The **Notes** dialog appears.
4. In the **New Message** field, enter the text.
5. Click **Add**, and then click **Close**. The note is visible in the frame or in the white space.

Note: Notes can be added to planned pages in both the Plan view and the Preview view. Free text can be added in the Plan view only.

To Add Free Text to a Frame on a Planned Page

You can only add free text to empty frames, and you cannot add products to frames that contain free text.

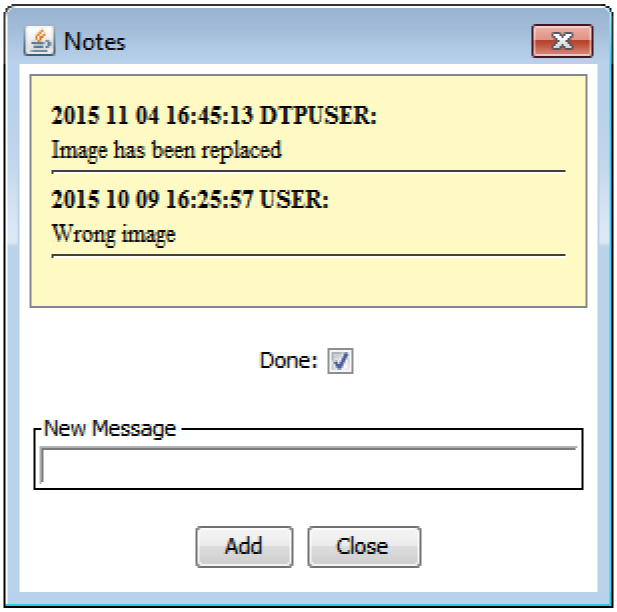
1. In the **Tree**, expand the **Publication** hierarchy, and then click the relevant spread.
2. Click the **Plan** tab.
3. Double-click the free text frame, or right-click and select **Set Text**. The **Add Text** dialog appears.
4. Enter the text in the text field.
5. Click **Add**, and then click **Close**. The text appears in the frame.

To Edit and Delete Free Text

- To **edit** free text, follow the same steps as you would to add free text.
- To **delete** free text, right-click the free text frame and select **Remove Content**.

To Edit and Delete Notes From the Plan

- To **edit** a note from the Plan, double-click on the relevant note and add text.
- To **delete** a note from the Plan, right-click the relevant note, and then click **Delete Note**.
- Instead of deleting a note, you may also mark it as **Done**. This allows you to keep the note while letting other users know that no further action needs to be taken.



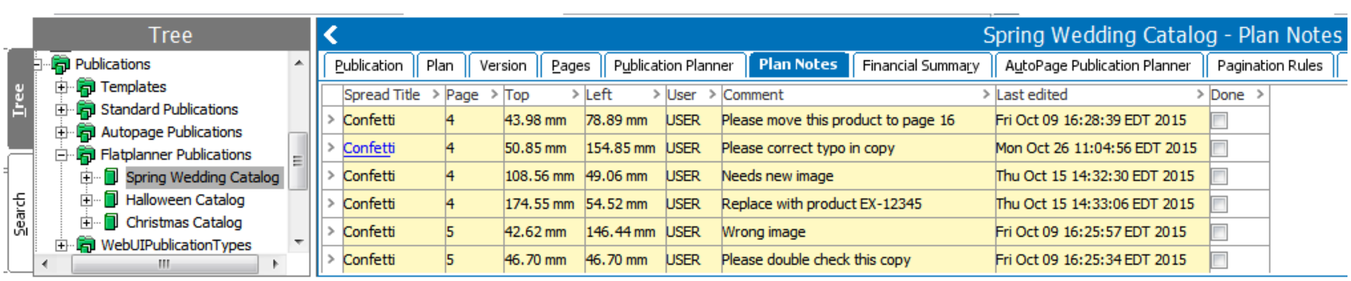
Using the Plan Notes Tab

The **Plan Notes** tab enables the viewing, editing, and deletion of all planned page notes in one location. This tab is accessible from the publication, section, and planned page level of publications. You can access all notes in a publication from the publication level; all notes in a section from the section level; and all notes in a spread from the planned page level.

Edits made to notes from the Plan Notes tab will be reflected in the notes attached to the Flatplan. Likewise, edits made to notes on the Flatplan will be reflected on the Plan Notes tab.

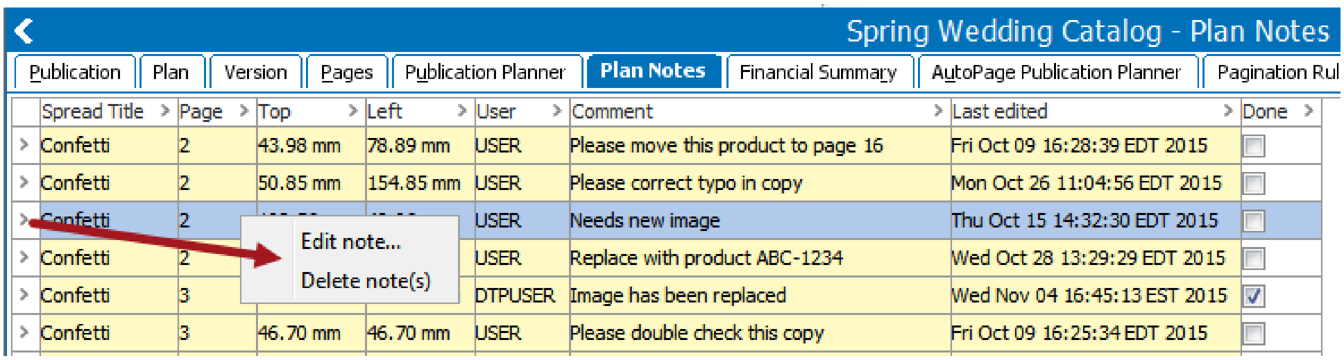
Editing notes on this tab is similar to editing notes on Flatplan frames—new text can be added, but existing text cannot be edited. The Plan Notes tab will always display the most recent notes text.

Note: Notes cannot be added to planned pages from the Plan Notes tab, as there is no way to position them on the page. Notes can only be added via a right-click action on page spreads.



To Edit or Delete Notes From the Plan Notes Tab

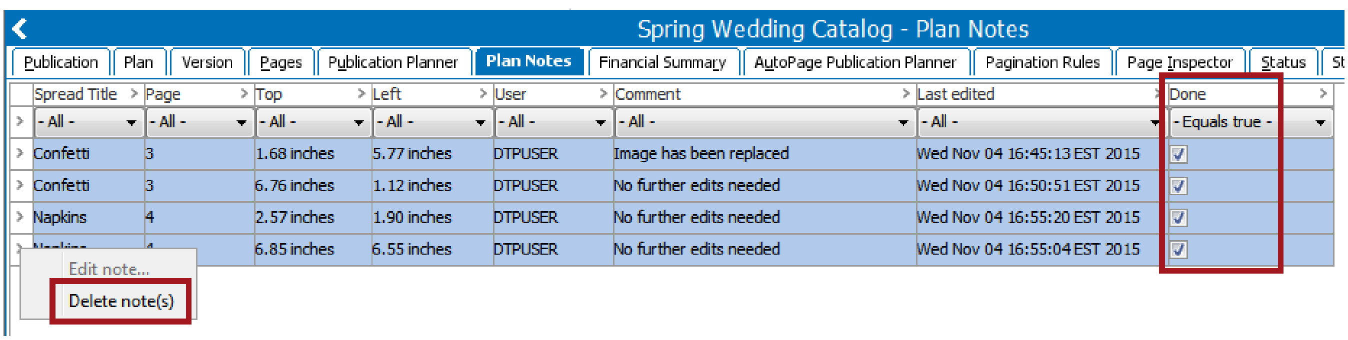
1. Select the note that you would like to edit or delete by left- or right-clicking on the small gray arrow at the beginning of the row.
2. In the popup menu, choose 'Edit note...' or 'Delete note(s)'. Multiple notes may deleted at once if multiselected.



Sorting and Filtering Notes

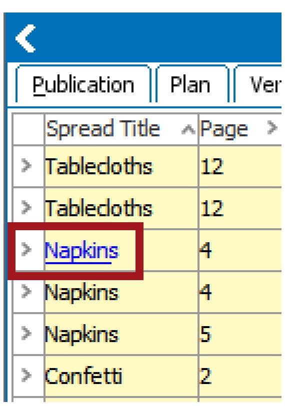
Notes can also be sorted and filtered on the Plan Notes tab. Example use cases include:

- The placement of notes throughout a publication can be determined by filtering on Spread Title, then further pinpointed by sorting on 'Left' and 'Top' (X / Y) coordinates.
- All notes that are marked as 'Done' can be identified by filtering the Done column on 'true'. The notes can then be multiselected and deleted.



Navigation to Spreads

Spread titles are hyperlinked in the 'Spread Title' column. Simply slick on a hyperlink to navigate directly to the Planned Page.



View Modes

Different viewing modes allows you to view the content and layout of planned and actual pages in different ways.

To Change the View Mode

1. In the **Tree**, expand the **publication** hierarchy, and then select a section or spread.
2. On the **Plan** tab, right-click in the white area, and then select the preferred view from the list.

View Mode	Description
Show Plan	Displays the allocated space and position for each type of object specified in the template. The page is divided into colored squares where you can mount products or images. If you are using page templates created in InDesign, the frame types are automatically converted into generic frame types that can be used for both images and products.
Show Preview	Displays a preview of how the product and images are positioned on the page based on the product template applied to the frames. The preview is created from the InDesign (DTP) server.
Show Sticker Book	Displays products and images along with commercial data such as prices and sales numbers. The commercial data is displayed as yellow sticky notes along with a thumbnail image of the product. If no commercial data is displayed, you must add the commercial data element to the Sticker Book view.
Show Mounted Page	Displays how the actual pages look after the pages have been completed in the InDesign and saved back to STEP. This view is read-only.
Show Frame IDs	Displays the frame id for each frame on the plan. You use the frame ids when the importer is used to add objects to a frame.
Show Product Template	Displays the product template that is assigned to each frame.
Show Page Template	Displays the page template that is assigned to the page in the gray area above the plan.

View Mode	Description
Show Page Spaces	Displays how the page space is split and how the page spaces are assigned.
Highlight Differences Relative to Default Layer	Is only active when preview mode is selected. Any differences between the current layer and the default layer are highlighted by a gray box.

Customized Views

You have a number of options to customize views so that they are more efficient for you to work with. You can add additional content, choose whether a view is private or public, and you can filter the data that is displayed.

You can customize the following views.

- Basket view
- Financial Summary view
- Sticker Book view

Customized View Content

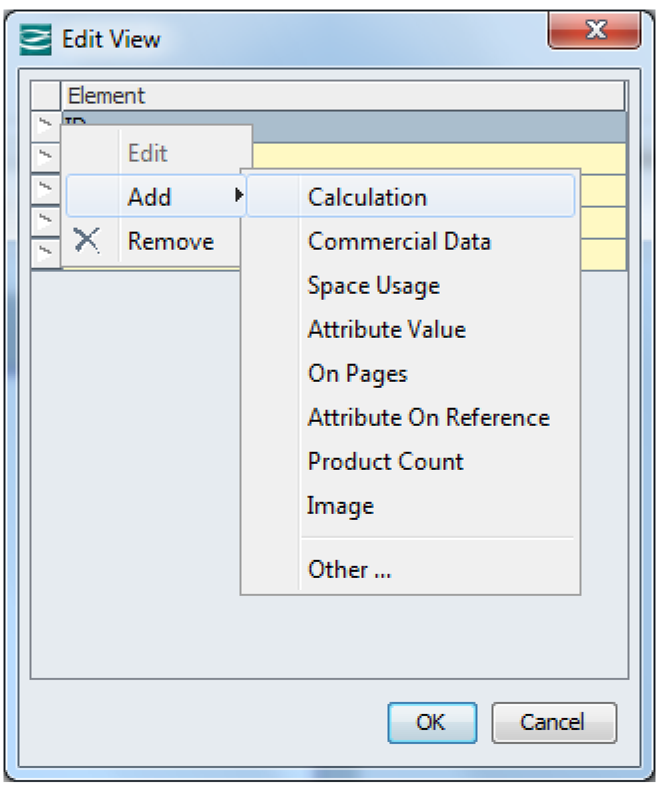
You can add or remove the following view content.

Content Element	Description
Commercial Data	Enables you to select a specific term type to be included in the view. A term is a combination of a value and a set of conditions.
Attribute On Reference	Displays the attribute values of the selected reference type.
Attribute Value	Displays the value of the attribute.
Calculation	Enables you to specify a calculated attribute formula. The result of the formula is then displayed in the view.
ID	Displays the IDs of the objects.
Image	Displays a thumbnail of the image.

Content Element	Description
Name	Displays the name of the objects.
On Pages	Displays information about the pages the object is used on.
Product Count	Displays information about the number of products in the view.
Space Usage	Displays information about how much space a product takes up on a page.

Adding View Content

1. In the **Tree**, expand the **Publication** hierarchy, then select a section or spread.
2. On the **Plan** tab, select **Sticker View** from the **View** list, click **Show basket**, or click the **Financial Summary** tab.
3. In the upper right corner, click **View Options**, and then choose **Edit**. The **Edit View** dialog displays a list of the current view content elements.
4. Click an element, right-click, point to **Add**, and then choose the element you want to add. The eight most recently used elements are displayed. To view more content options, click **Other ...**.



5. Click **OK**, to save the view. By default, the view is saved as a private view and is not available to others.

Some content elements are added immediately and require no further action. However, for each of the following elements, a dialog is displayed where you have to specify more information.

Attribute On Reference

- From the **Reference Type** list, select the preferred reference type.
- From the **Attribute** list, select the attribute whose value you want to be displayed.

Attribute Value

Click the ellipsis points (**...**), and then navigate to the preferred attribute.

Calculation

- In the **Name** field, enter a name for the calculation.
- In the **Formula** field, click the ellipsis button **(...)**, and then specify the preferred formula.

For detailed information about calculations and how to specify functions, see Calculated Attributes and Function Editor in the Attributes section of the System Setup guide.

Commercial Data

- In the **Data Type** list, select the preferred data type.
- In the **Break No.** field, enter the quantity break number of the quantity span that you want to be displayed.
- For detailed information, see commercial data
- If your price list contains multiple prices for the same product covering different quantities and/or date spans (also called quantity breaks), use the Group field to map the various price groups. Quantity breaks are numbered from 1 and up.

Image

- In the **Reference Type** field, enter the type of image to be displayed.
- From the **Size** list, select the preferred image size.

Copying Views

In some cases it can be useful to copy an existing view before creating a new customized view. For example, when you want to create a view that, with a few exceptions, is similar to an existing view. If you want to rename a view, you also have to copy the view before you can rename it.

To Copy a View

1. On the plan tab,select **Sticker View** from the **View** list, or click **Show basket** or click the **Financial Summary** tab.
2. In the upper right corner, click **View Options**, and then choose **Copy**. The **Copy Column View** dialog is displayed.
3. In the **Copy to ...** field, enter the name of the new view, and then click **OK**. You can now select the view from the view list.

Deleting Views

1. On the plan tab,select **Sticker View** from the **View** list, or click **Show basket** or click the **Financial Summary** tab.
2. In the upper right corner, click **View Options**, and then choose **Delete**. A dialog is displayed asking if you want to delete the view. Click **Yes**.

Filtering Options

Filters allow you to view a subset of data. Instead of viewing all data in Basket view or Financial Summary view, you can choose which data you want to see at any given time.

To Filter Information

1. On the plan tab, click **Show basket** or click the **Financial Summary** tab.
2. Right-click a column header, and then choose **Filtering enabled**. A row with filtering options is added.
3. In a column, click the arrow , and then choose the preferred filtering options. You have the following options.

Filter Options	Description
All	Displays all data.
Empty Values	Displays only fields with empty values.
Non Empty Values	Displays only fields with values.
< (less than)	Displays only values that are less than the number you specify.
> (greater than)	Displays only values that are greater than the number you specify.
Contains	Displays only values that contain the string you specify.
Equals	Displays only values that match the text you specify.
Begins with	Displays only values that begin with the text you specify.
Ends with	Displays only values that end with the text you specify.

Public and Private View Options

Views can be public or private. Public views are available to all users. Private views are only available to the user who created them.

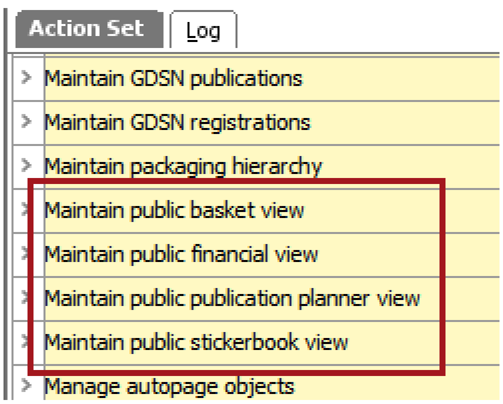
To Make the Current View Public

1. On the plan tab, select **Sticker Book** from the **View** list, click **Show basket**, or click the **Financial Summary** tab.
2. In the upper right corner, click **View Options**, and then choose **Public** or **Private**.
   - When you select **Public**, all users can select the view from the view list in the upper left corner. A Public view has "- Public" appended to its name.
   - When you select **Private**, the view is only available to you from the view list in the upper left corner.

Restrict Users From Maintaining Public Views

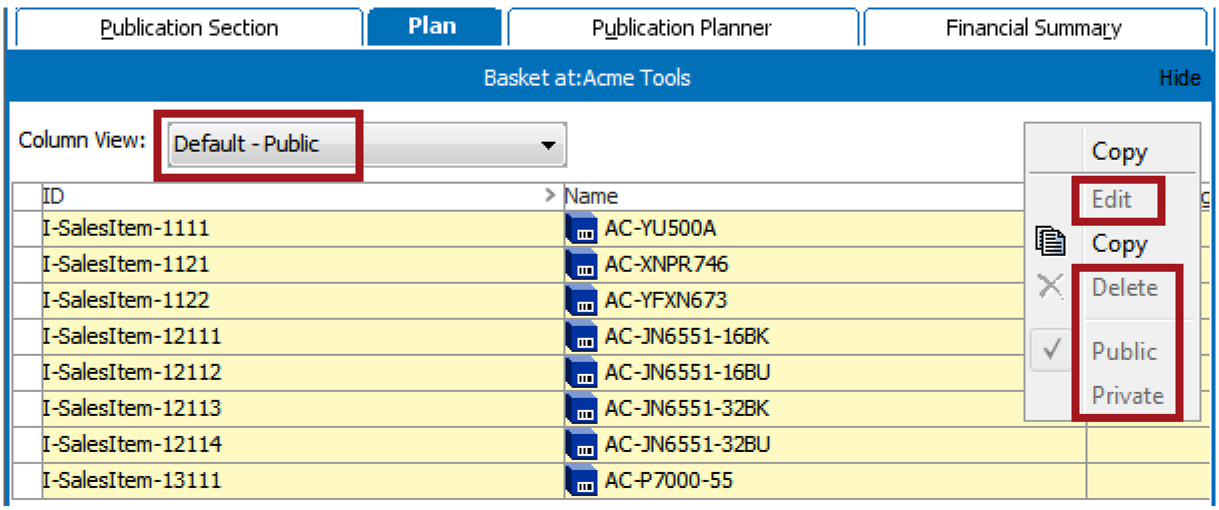
Users may not create, edit, or delete public views of the basket, financial summary, publication planner, or sticker book unless they have the privileges to do so. The following four user actions enable these privileges:

- Maintain public basket view
- Maintain public financial view
- Maintain public publication planner view
- Maintain public stickerbook view



Users who are not granted these privileges will have the option to maintain individual private views only, thereby blocking the possibility of a user saving a private view over a public view. Non-privileged (restricted) users may copy a public view and configure this copy to their individual preferences, but this copied view will be Private and only visible to the user who created it.

In a **Public** view, the following 'view options' commands are disabled for restricted users: Edit, Delete, Public, and Private.



In a **Private** view, Edit and Delete are enabled, but Public and Private remain disabled.

See the **About Privilege Rules** section of the **System Setup** / **Super User** documentation for more information on the setup and configuration of user privileges.

Removing View Content

Just as you can add view content, you can remove view content as well.

1. Activate **Basket** view, **Financial Summary** view or **Sticker Book** view.
2. In the upper right corner, click **View Options**, and then choose **Edit**. The **Edit View** dialog displays a list of the current content elements of the view.
3. Click the element you want to remove, right-click, choose **Remove**, and then click **OK**.

Sorting and Show Options in Basket View

By using the sort options, you can arrange the data in Basket view in ascending or descending order.

1. On the plan tab, click **Show basket** or click the **Financial Summary** tab.
2. Right-click a column header, and then choose the preferred sort order.
   - Sort ascending: sorts alphabetically from A to Z or from the smallest to largest number of data.
   - Sort descending: sorts alphabetically from Z to A or from the largest to smallest number of data.

In Basket view, you can also choose to see where an object is used in the planned pages.

- In **Basket** view, right-click a column, and then choose **Show in plan**. The object is selected in the planned page.

Reusing Saved Layouts

When a document has been finalized in InDesign, and saved back to the STEP database, you can reuse the layout of that document.

There are two ways of reusing layouts.

- Keeping the finalized layout of the actual page that matches the planned page.
- Using the layout of a different publication that has been saved back to the STEP database.

Keeping the Saved Layout of an Actual Page

When a document that has been finalized in InDesign is saved back to the relevant publication in the STEP database, the product layouts of the planned pages are automatically picked up from the actual pages. This means that the product layout defined for the mounted products on the planned pages is overridden.

- To determine if a product uses a saved layout, select **Plan** view, and then **Show Product Templates** view. Keep Layout is displayed at the bottom of the frame instead of the name of the product template.

You can revert to the old layout of the planned pages because the old layout rules are overridden but not deleted.

To Revert to the Planned Layout

1. In the **Tree**, expand the **publication** hierarchy, and then click the preferred section or spread.
2. On the **Plan** tab, right-click the white area of a page or select a product frame and right-click the frame.
3. Point to **Layout**, and then select **Revert to Planned Element Layout**.

The layout of the selected product or all products on the page reverts to the planned layout. When you view the name of the product template, a **T**: is displayed.

To Switch Back to the Saved Layout

- On the **Plan** tab, right-click the white area or select a product, and then right-click the product.Point to **Layout**, and then select **Keep Saved Element Layout**.

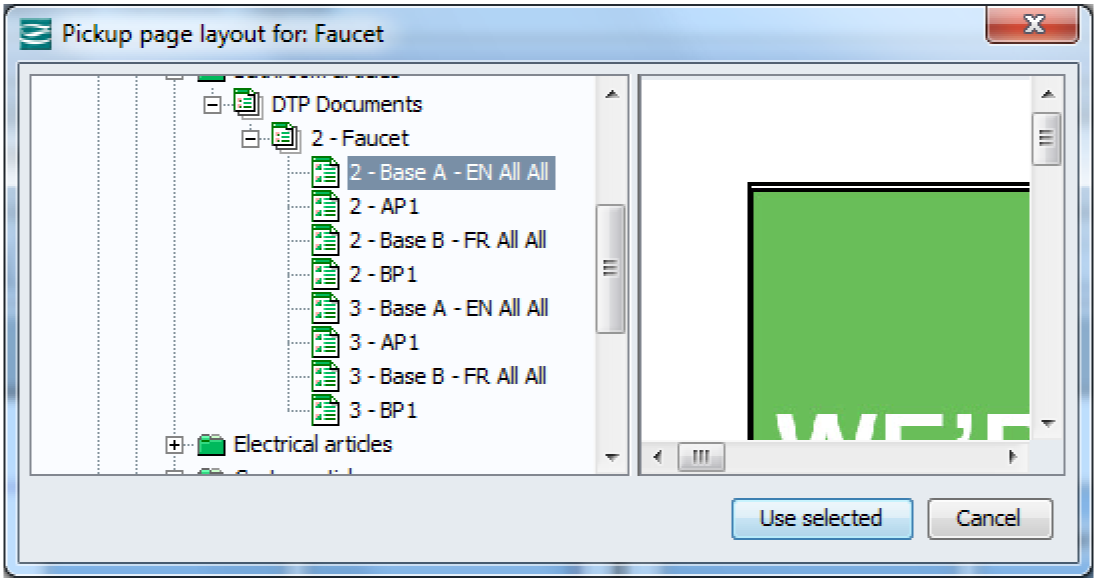
Using a Saved Layout from Another Publication

You can reuse layouts from all publications that have been saved back to the STEP database after having been finalized in InDesign. This is called Pickup Layout. You can pickup both product and page layouts.

Finalized documents are located in the tree in a node called DTP Documents under the associated publication.

To Pickup a Saved Page Layout

1. In the **Tree**, expand the **publication** hierarchy, and then click the preferred section or spread.
2. On the **Plan** tab, right-click the white area, point to **Layout**, and then select **Pickup Page Layout**.
3. In the **Pickup Page Layout** dialog, navigate to and expand the relevant publication and **DTP Documents** folder, and then click the preferred page. A preview of the selected page is displayed.



1. Click **Use Selected** to apply the layout to the planned page.

To Pickup a Saved Product Layout

1. In the **Tree**, expand the **publication** hierarchy, and then click the preferred section or spread.
2. On the **Plan** tab, select the frame that contains the object that you want to apply the layout to.
3. Right-click the frame, point to **Layout**, and then select **Pickup Layout**.
4. In the **Pickup Layout** dialog, navigate to and expand the relevant publication and **DTP Documents** folder, and then click the preferred page. A preview of the selected page is displayed.
5. Click **Use Selected** to apply the layout to the product.

If you decide that you don't want to use the product or page layout that has been picked up, you can revert to the planned layout as described previously.

Finalizing Pages in InDesign

Pages created with the Flatplanner can be finalized in InDesign. You can use the standard InDesign tools in combination with the STEP'n'design plug-ins. The STEP'n'design plug-ins enable you to connect to the STEP database and work with InDesign documents as dynamic documents.

This has a number of advantages:

- You have access to approved text and images that are ready for layout
- You can view notes and comments added to the pages in the Flatplanner
- You can save finalized documents back to STEP

Overview of the STEP Menu in InDesign

- When the STEP'n'design plug-ins are installed in InDesign, a STEP menu is added to InDesign's menu bar. The STEP menu gives you access to specific STEP'n'design functions and enables you to perform a range of operations on the active InDesign page.
- The STEP palettes (also known as **panels**) are used for actual mounting of STEP data, including template composition and image mounting. The STEP palettes consist of six different tabs: STEP Structure View, STEP Template Content, STEP Template Frame, STEP Images, STEP Tasks, and STEP Publication View. The tabs are used like other InDesign panels.

For more information, see the following STEP'n'design introductory topics:

- **Installing STEP'n'design**
- **Description of the InDesign Interface**

Mounting Planned Pages

This section provides information about mounting planned pages and finalizing pages in InDesign when working with STEP Flatplanner. It also contains a description of how to update planned pages and how to use a workflow when using STEP Flatplanner.

This topic assumes the following:

- Products have already been linked to planned pages in the Flatplanner
- You have already logged into the relevant STEP system from InDesign using the STEP'n'design plugin

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Note: Before mounting your pages, make sure that you are working in the correct publication **version**. The current version is displayed at the bottom of the STEP Publication View panel (e.g., 'Spring Wedding Catalog / English US'). For information on how to change your current version, see **Working With Version Layers** in the **STEP'n'design** documentation.

Mounting Planned Pages Using a Stored Publication Template

If using a publication template already stored in STEP, there is no need to have an InDesign document already open to mount your pages. In fact, there is no need to even have the templates saved on your local machine.

Follow these steps to mount a planned page in InDesign by using documents stored in STEP and not on your local computer.

Note: When using this method, you should mount the left side of a spread first (the even-numbered page), then the right side (odd-numbered) next.

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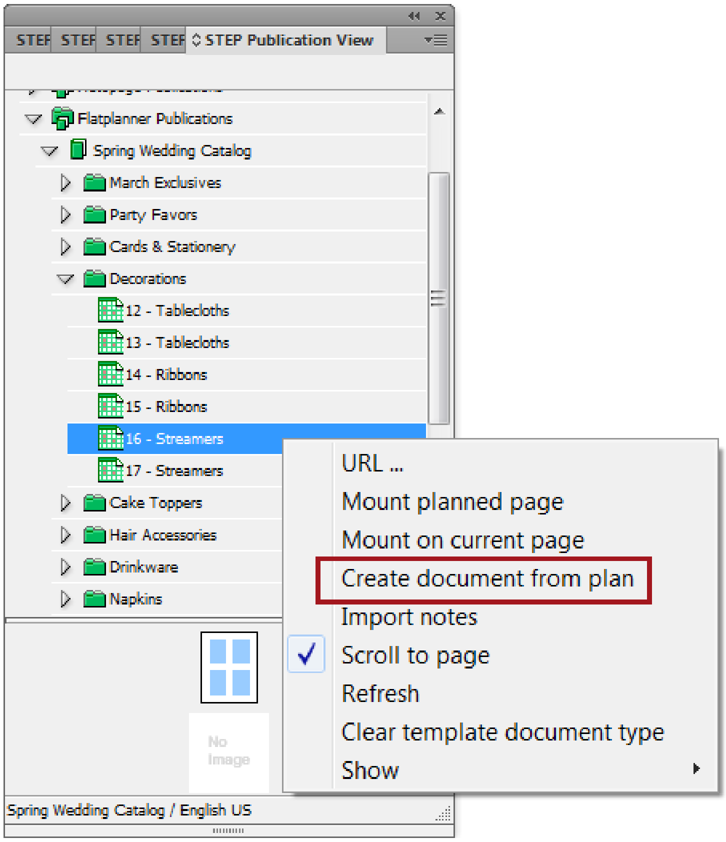
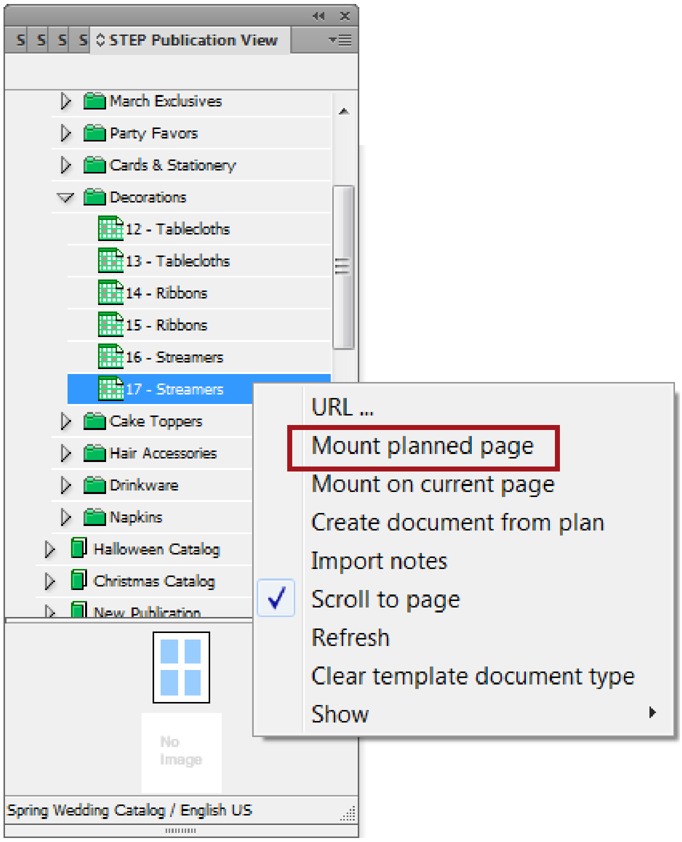
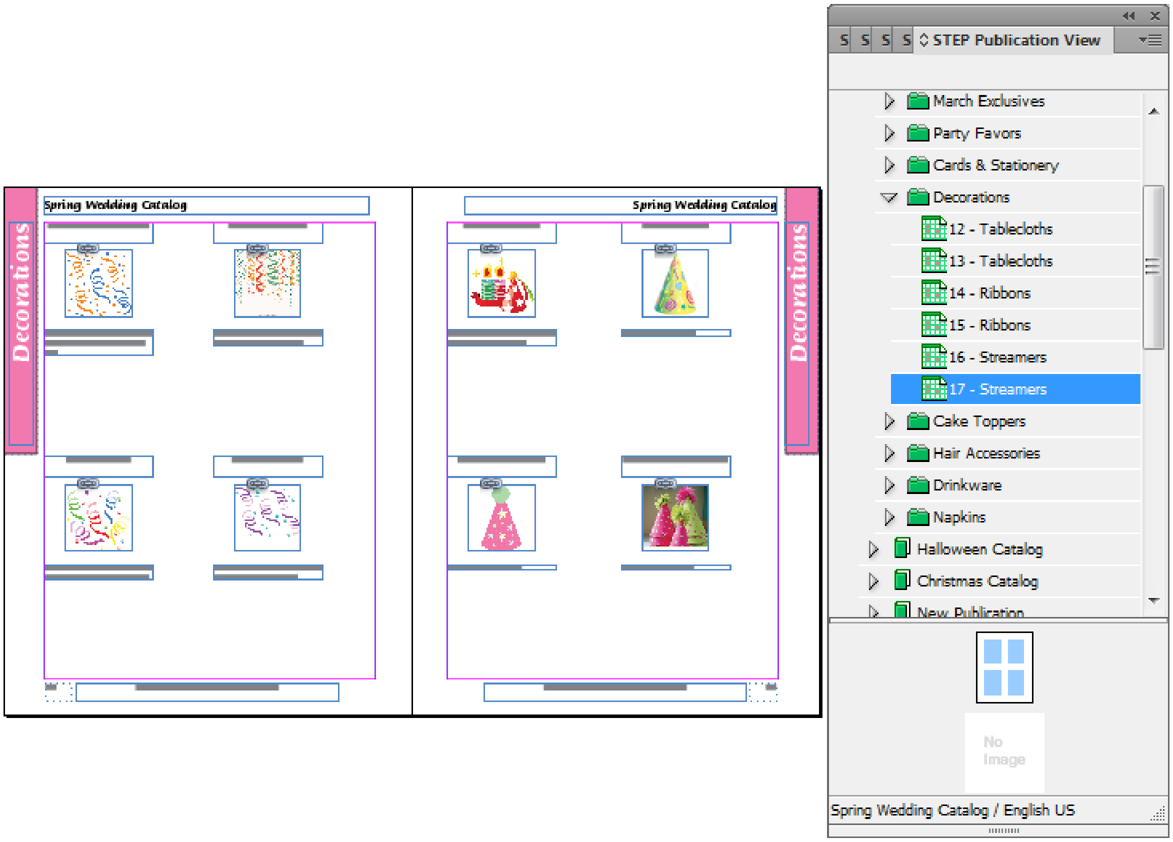
1. In InDesign, navigate to the **STEP Publication View** panel by navigating to Window > STEP Publication View from the InDesign application bar across the top of the InDesign interface.
2. In the **STEP Publication View** panel, navigate to the even-numbered page that you would like to mount, then right-click and select **Create document from plan**. (You can also access **Create document from plan** by clicking on the **options** dropdown menu in the upper right corner of the STEP Publication View panel.)



3. In a few moments (depending on your system's speed), the InDesign page will generate in the background, then automatically open with the mounted Flatplanner content. This page (the even-numbered one) will be a single page.
4. To mount the second page in the spread, right-click on the next page (the odd-numbered page) in the STEP Publication View, then click **Mount planned page.**



5. In a few moments (depending on your system's speed), the second InDesign page in the spread will generate in the background, then automatically open as the right page of the spread, complete with its mounted Flatplanner content.



6. Make additional changes to the document as needed. These changes could include adding standalone graphics, manually manipulating the layout of objects, or even dragging and dropping additional elements onto the page from the **STEP Structure View** or **STEP Images** panels.
7. Save the document locally, then save it into STEP. (See the **Saving the Mounted Spread to STEP** section later in this topic for instructions.)

Mounting Planned Pages Using a Mounting Page

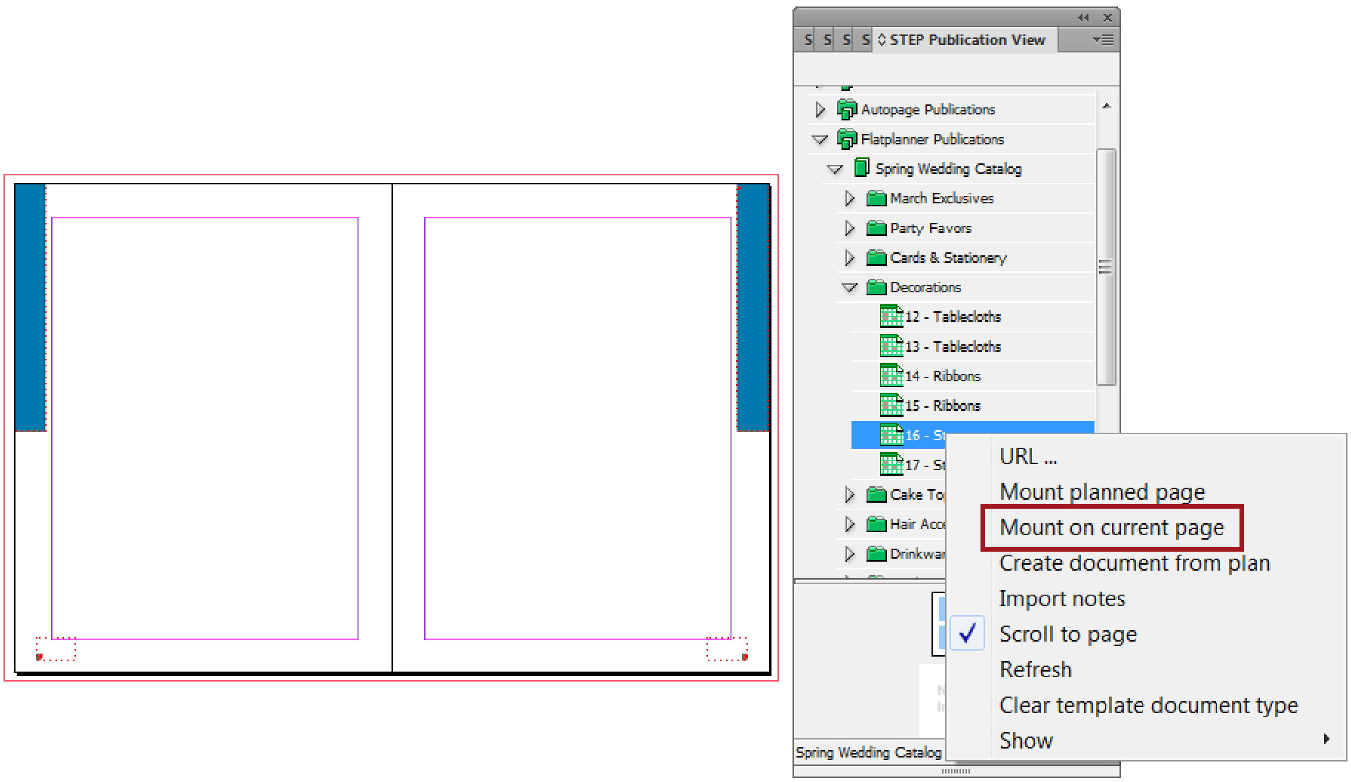
Even though a publication template is required to be stored in STEP in order to create publications and generate proof views, designers will often choose to build pages using a document called a **mounting page**. A mounting page is not generated using STEP'n'design, nor is it saved into STEP. However, it functions like a publication template in that it contains all the paragraph styles, swatches, background elements, etc., that would typically be included on a publication template.

Note: If you would like to mount metadata (description) attribute values from a publication, section, or planned page object onto your InDesign page, the associated STEP'n'design tagging must be present on the publication template and/or page template(s) that are stored in STEP and linked to your publication. This information cannot be mounted to the InDesign page using a mounting page alone.

Follow these steps to mount a planned page in InDesign by using a **mounting page** that is saved on your local machine:

1. With your mounting page open in InDesign, navigate to the **STEP Publication View** panel by navigating to Window > STEP Publication View from the InDesign application bar across the top of the InDesign interface.
2. In the **STEP Publication View** panel, navigate to the page that you would like to mount.
3. Select the InDesign page (left or right side of your mounting page) onto which you would like to mount the Flatplan.
4. Right-click your page in the STEP Publication View panel and select **Mount on current page**. (You can also access **Mount on current page** by clicking on the **options** dropdown menu in the upper right corner of the STEP Publication View panel.)

Note: If the Flatplan mounts on the incorrect page, navigate to the Pages panel in InDesign (Window > Pages) to ensure that the correct InDesign page is selected.



5. Follow the same steps for the other side of your spread.
6. Make additional changes to the document as needed. These changes could include adding standalone graphics, manually manipulating the layout of objects, or even dragging and dropping additional elements onto the page from the **STEP Structure View** or **STEP Images** panels.
7. Save the document locally, then save it into STEP. (See the **Saving the Mounted Spread to STEP** section later in this topic for instructions.)

Mounting Planned Pages Using a STEP Workflow

Flatplanner workflows can be configured with built-in functionality to automatically mount planned pages using an InDesign server, which is linked to the STEP application server as a sidecar. When InDesign pages are automatically built by an InDesign server, the workflow tasks performed by DTP users of Flatplanner workflows involve opening pre-mounted pages and making layout adjustments to them before saving back to STEP.

For more information on how to open pre-mounted pages in InDesign in conjunction with the Flatplanner workflow, as well as save these pages back to STEP once completed with the workflow task, see the **Flatplanner Workflows** documentation.

Saving Mounted Planned Pages to STEP

Once your planned page has been mounted in InDesign and all necessary changes have been made on the page, the typical next step is to save it back to STEP.

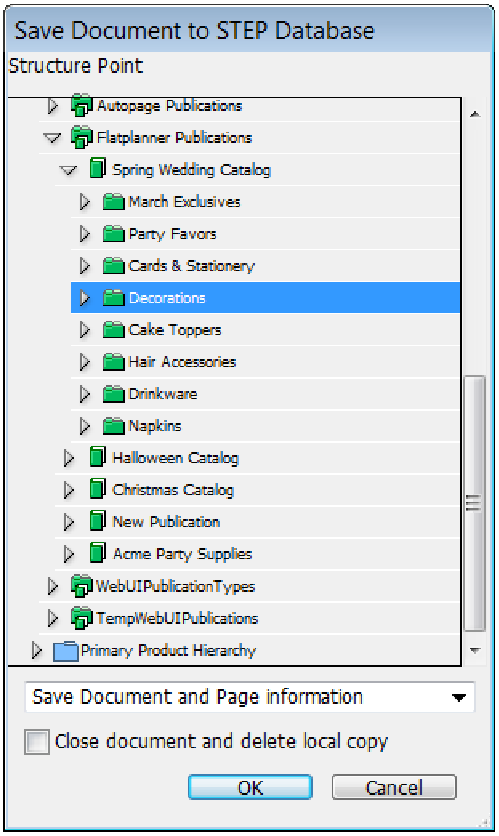
Though it is optional to save mounted InDesign documents back to STEP, these documents must exist in STEP in order to take full advantage of STEP's publishing capabilities, such as extraction of product indexes and calculation of space usage.

To save a mounted InDesign document back to STEP, follow these steps:

1. With your mounted document open in InDesign, first save it to your local computer.

   Note: InDesign documents must first be saved locally before they can be saved to STEP.

2. Next, navigate to STEP > **Save Document to DB** from the **STEP** menu (which appears in the InDesign application bar across the top of the InDesign interface). The **Save Document to STEP Database** dialog box displays. The section folder from which you mounted your planned page should be automatically selected. (If not, navigate to the correct section.)



3. From the dropdown list, select **Save Document and Page Information** (default) or **Save Page Information**.

   Choose **Save Document and Page Information** to save page information (such as page numbers and space allocation) into STEP as well as the actual InDesign page itself. This option stores these documents in the database for you and other users to access later.

   Select **Save Page Information** if you would only like to save page information into STEP. This option will save a thumbnail of your page to STEP but not the actual InDesign page itself. Some users may prefer this option in order to save space on their STEP application server.

4. Check **Close document and delete local copy** if you would like to save the document to STEP, then have the local copy automatically deleted from your computer.
5. Click **OK**. The document is saved back to STEP within the correct publication.

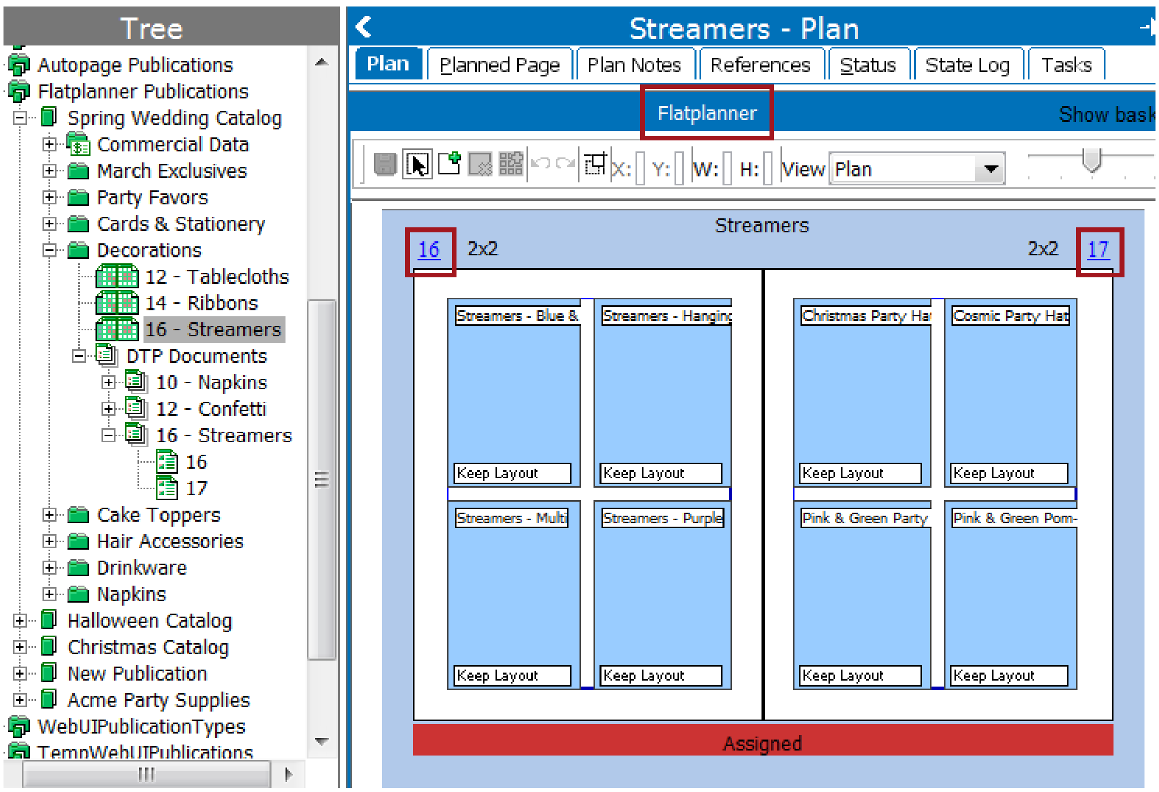
Note: Once mounted pages from a Flatplan are saved back into STEP, the frames on the Flatplanner page (in the Plan view) now display 'Keep Layout' instead of the name of the product template that was previously applied to the frame. If the planned page is mounted again, the layout from the saved actual page will be used instead of the layout from the original product template. For more information about layout rules and reusing saved layouts, see **Reusing Saved Layouts** in the **Flatplanner** documentation.

Viewing Mounted Actual Pages in STEP

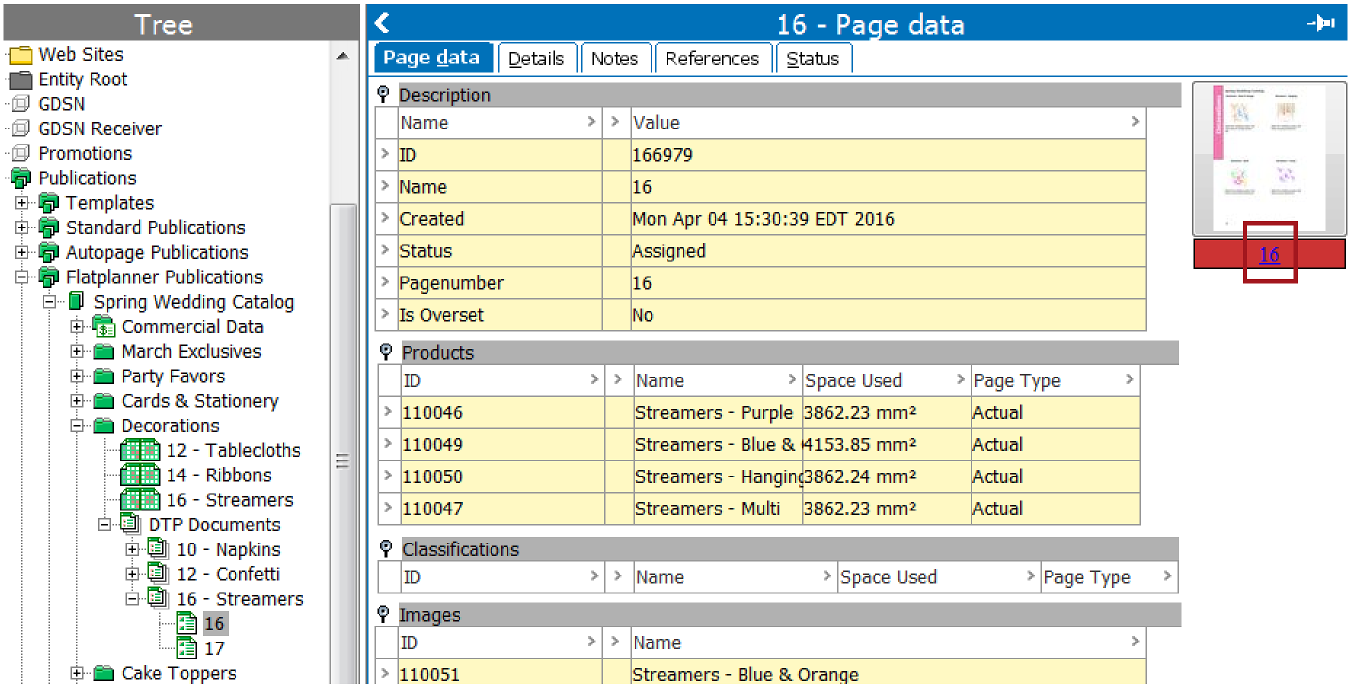
Mounted InDesign pages that are saved back to STEP are linked back to their original Flatplans through hyperlinks and can be viewed in multiple locations in STEP. The linking that exists between actual pages and Flatplans enables easy toggling between the original plan and the actual page.

The following list shows how actual pages, once saved back to STEP, are linked to Flatplans:

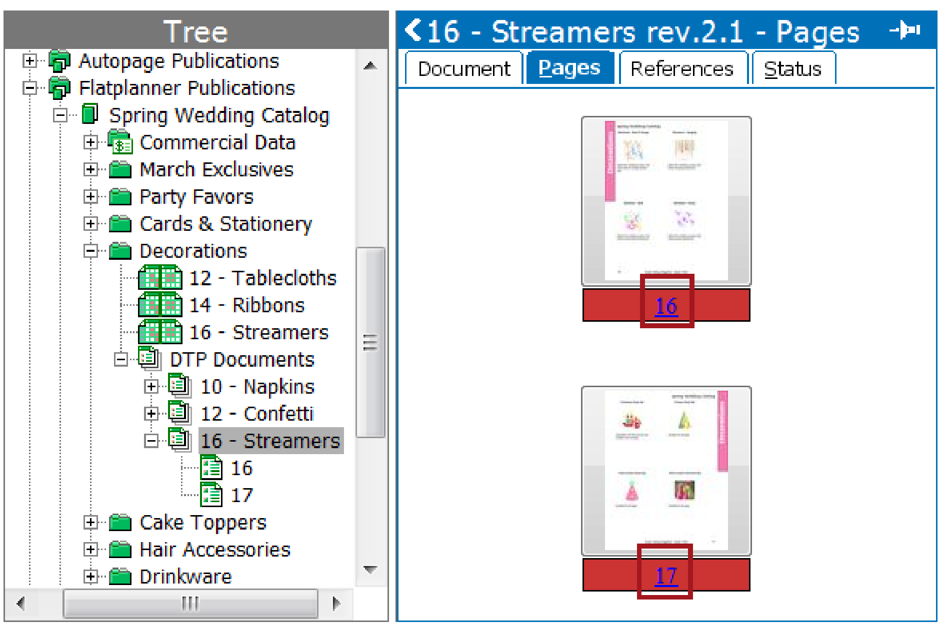
1. In the **Flatplanner**, hyperlinked page numbers appear in the upper left- and right-hand corners in all Views (Plan, Preview, Sticker Book, and Mounted Pages).



2. Click one of these hyperlinked page numbers to go to the **Page data** tab of the actual page. Click the page hyperlink below the actual page thumbnail to return to the Flatplan.



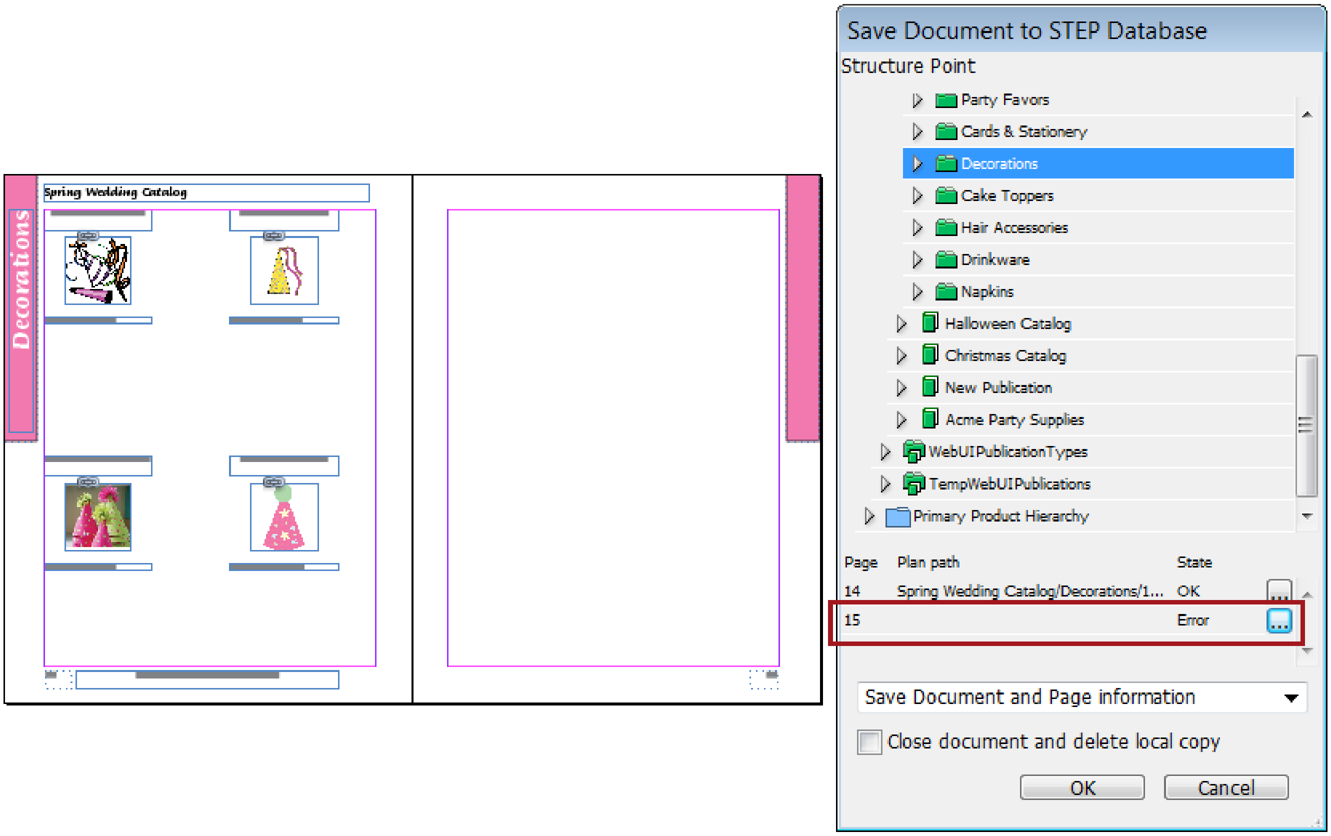
3. With the actual page **document** selected in the Tree, hyperlinks to the Flatplan appear beneath the thumbnails of the actual pages on the **Pages** tab.



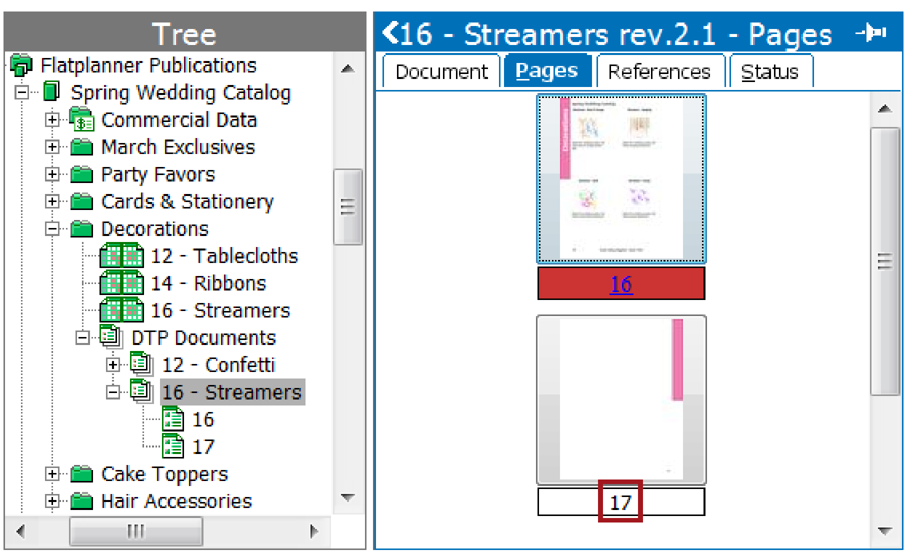
Saving Empty Mounted Pages Back to STEP

Pages in Flatplanner spreads must sometimes be left empty in order to allow space for content outside of STEP. Examples of content that designers may add from outside of STEP include full-page graphics or advertisements. A spread with an empty page is saved back to STEP in the same fashion as if both pages in the spread contained content.

Sometimes, however, an **Error** warning (outlined in the below screenshot) will appear when saving back an empty page. This typically happens if the empty page was manually added to the spread in InDesign (or was already present in the mounting page) and was not mounted from an empty Flatplan (i.e. a Flatplan that contains frames but has no linked products).

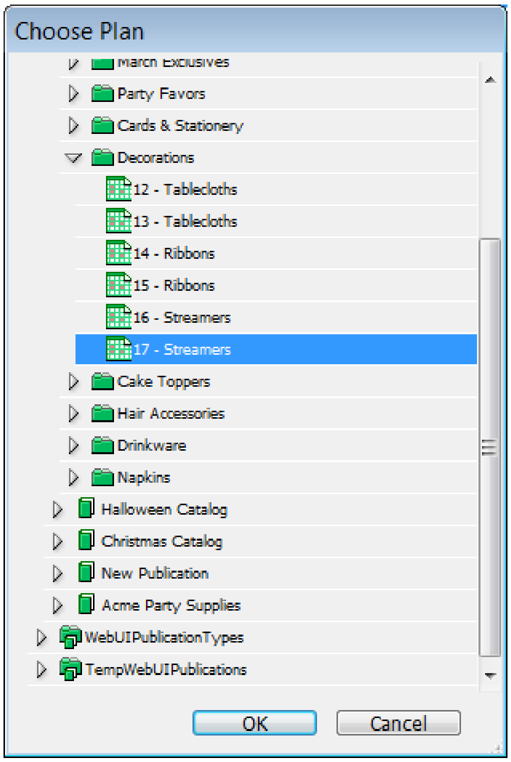


If you receive this error and ignore it, your empty actual page will be saved back to STEP but there will be no hyperlinks connecting it to the Flatplan, as pictured below:

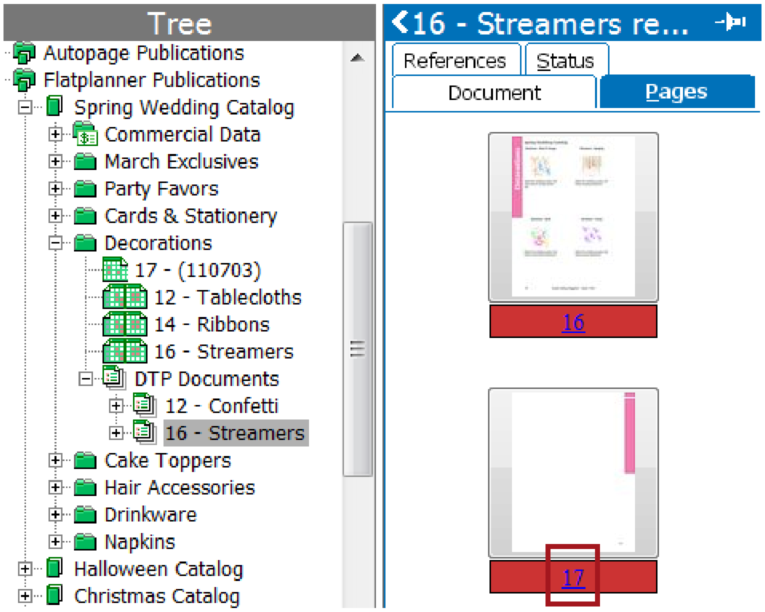


If you receive this error and would like to have your empty actual page linked to a Flatplan in STEP, follow these steps:

1. Click on the ellipsis button next to the **Error** status (outlined with a red frame in the first screenshot in this section). A **Choose Plan** dialog displays.
2. In the **Choose Plan** dialog, navigate to the Flatplan (planned page) to which you would like to link your actual page, then click OK.



3. The empty actual page is saved to STEP and contains a hyperlink to the selected Flatplan.



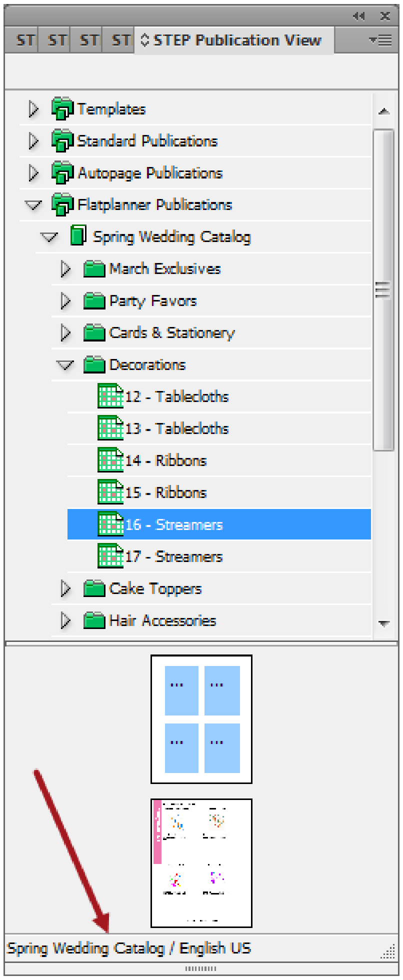
Opening Mounted Flatplanner Pages in InDesign

If changes need to be made to mounted pages after they are initially saved in STEP, they should be opened from within InDesign, *not* from your local computer.

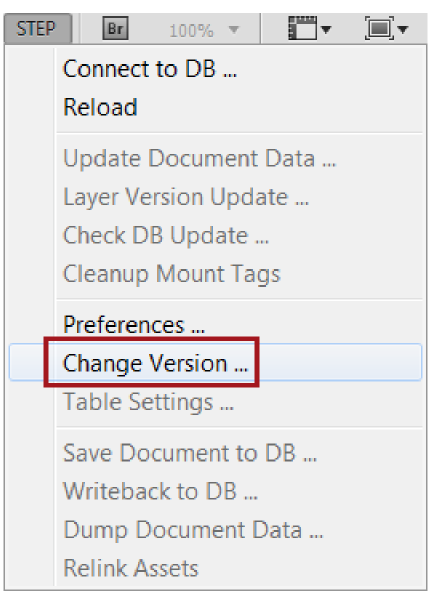
When a page in STEP is opened from within InDesign and edited, saving this page back to STEP from within InDesign will overwrite the page that was previously saved. If you make edits to a page from your local machine instead, then save that document back to STEP, a new document will be created in STEP and this document will not be linked to the original Flatplan.

To open mounted Flatplanner pages from the **STEP Publication View** panel, follow these steps:

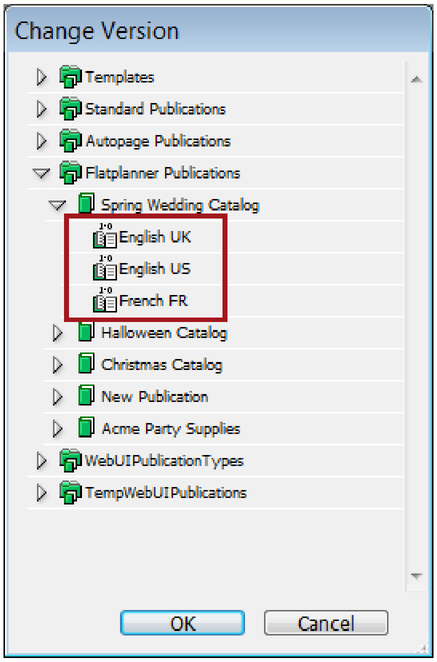
1. In InDesign, open the **STEP Publication View** by navigating to Window > STEP Publication View from the InDesign application bar across the top of the InDesign interface.
2. Next, make sure that you are working in the correct publication **version** in InDesign. Your publication version will be displayed at the bottom of the STEP Publication View palette; for example, Spring Wedding Catalog / English US.



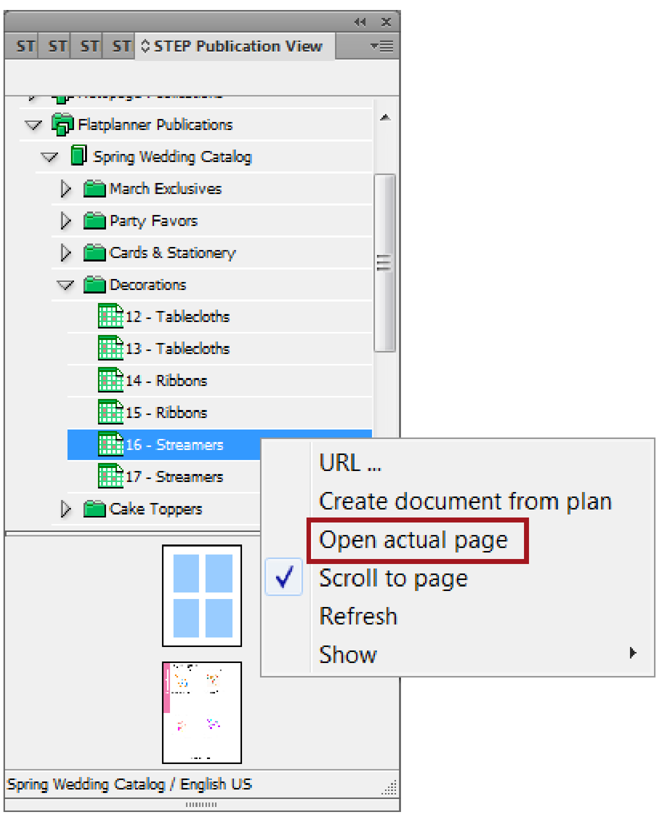
3. If the displayed version does not match the publication that you are working with, navigate to STEP > **Change Version** to change to the correct version.



4. In the **Change Version** dialog that displays, select the correct publication version, then click **OK**.



5. In the **STEP Publication View,** navigate to the Flatplan for the page that you would like to open. With the page object selected, right-click and select **Open actual page**.



6. The mounted page that was saved back to STEP will open. If the page was saved as part of a spread, both pages in the spread will open.
7. Make any changes to the page as needed, then save it back to STEP by following the same steps outlined in the first section of this topic.

Updating Documents in Flatplanner

After a document has been saved back to STEP it is possible to update page cells from the STEP Publication View palette.

Note: If a page needs to be updated, then a 'not equal' symbol is shown in the Preview area of the STEP Publication View.

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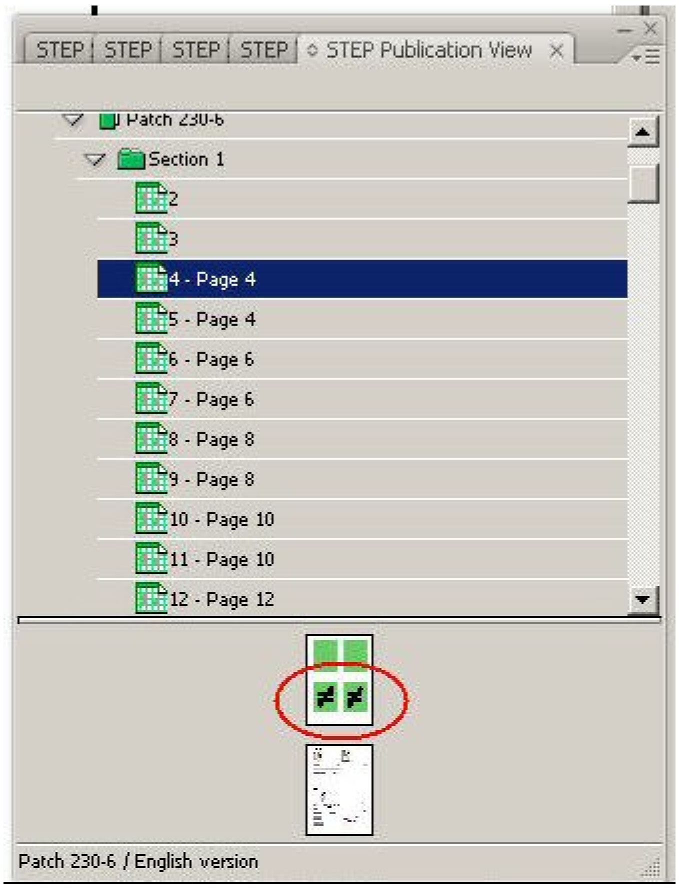
1. Click the relevant page in the Preview area of the **STEP Publication View**.



2. Expand the Options menu, and then click **Update page cell(s)**.

   The page cell is updated.

Using the getInheritedPublicationValue Function in Flatplanner

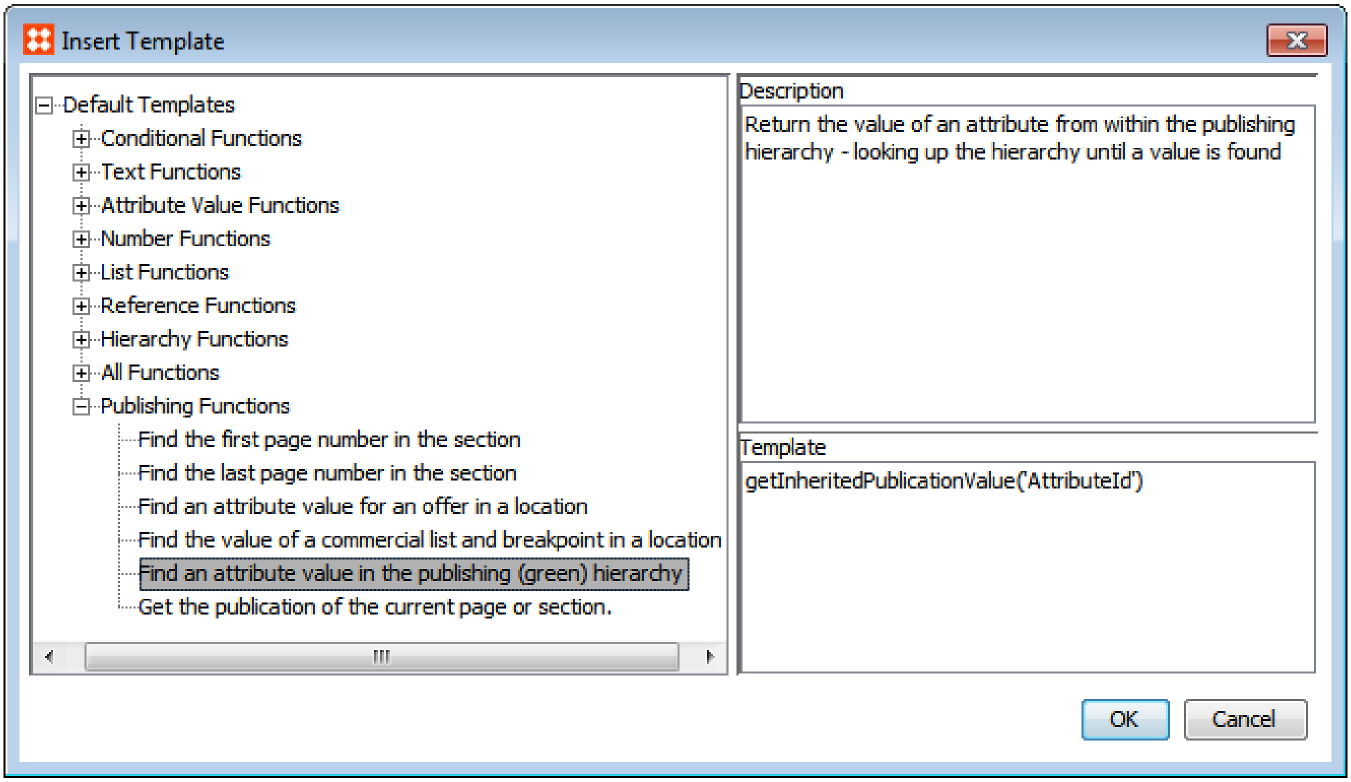
The calculated attribute function 'getInheritedPublicationValue' is used to pick up metadata (Description) attribute values from section, publication, and publication group objects. Use cases for this function include the display of publication-related metadata on mounted product objects, in Flatplanner Sticker Book views, and on Flatplanner planned pages.

When valid for Flatplanner planned pages, calculated attributes using the 'getInheritedPublicationValue' function can be used to mount publication metadata onto InDesign pages by way of InDesign tagging applied to the publication template. This functionality allows users more dynamic control over content that exists as 'furniture' (publication template elements) on page spreads. For example, a section-level description attribute that identifies the 'theme' of the Section could be displayed on side tabs or headers of mounted pages, reducing manual work on publication templates and mounted pages.

The following steps describe how to use the 'getInheritedPublicationValue' function to pull metadata values from a section, a publication, and a publication group onto an InDesign page mounted from a Flatplanner planned page.

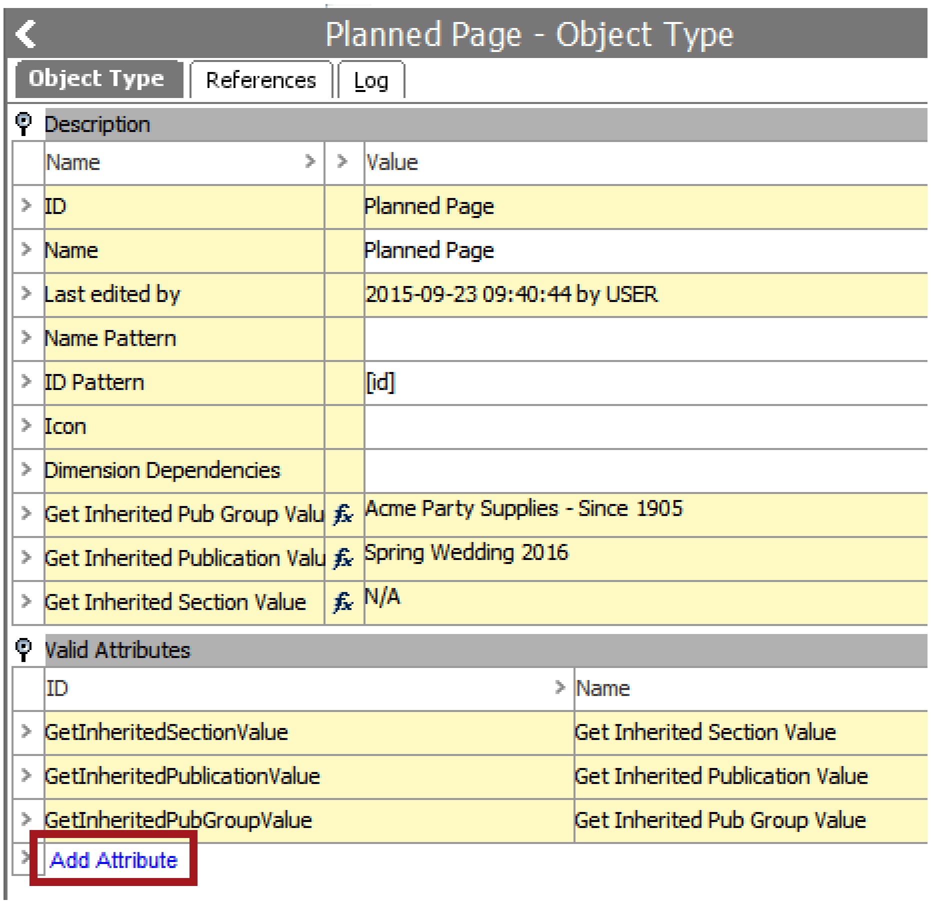
Configuring the Calculated Attribute(s)

1. Create a calculated Description attribute using the 'getInheritedPublicationValue' calculated attribute function by following these steps:
    - After creating the attribute, right-click in the **Value template** field on the **Attribute** tab and select **Edit Function**. The **Function Editor** will open.
    - Click **Insert Template**, then expand the **Publishing Functions** section of the Default Templates.
    - Select 'Find an attribute value in the publishing (green) hierarchy' and click OK. The **Insert Template** window will close.
    - In the **Function Editor**, replace ‘AttributeId’ with the ID of the metadata attribute that you would like to pull onto the page.

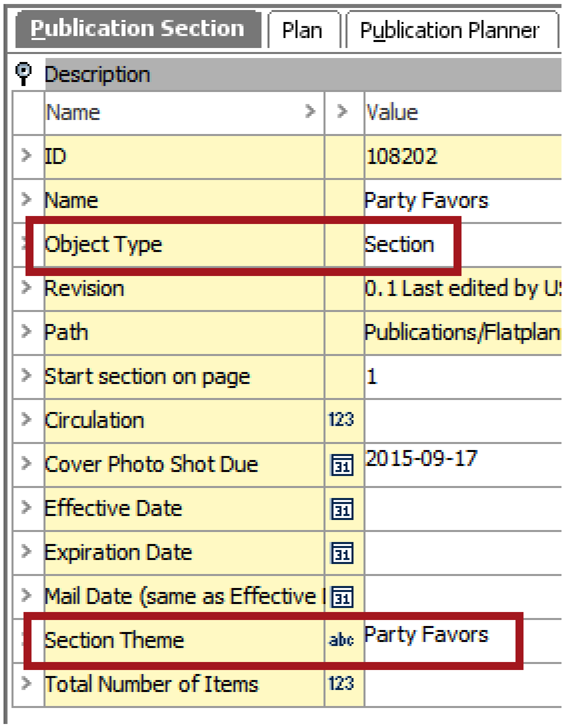


2. Make the attribute valid on **Planned Page** objects by following these steps:

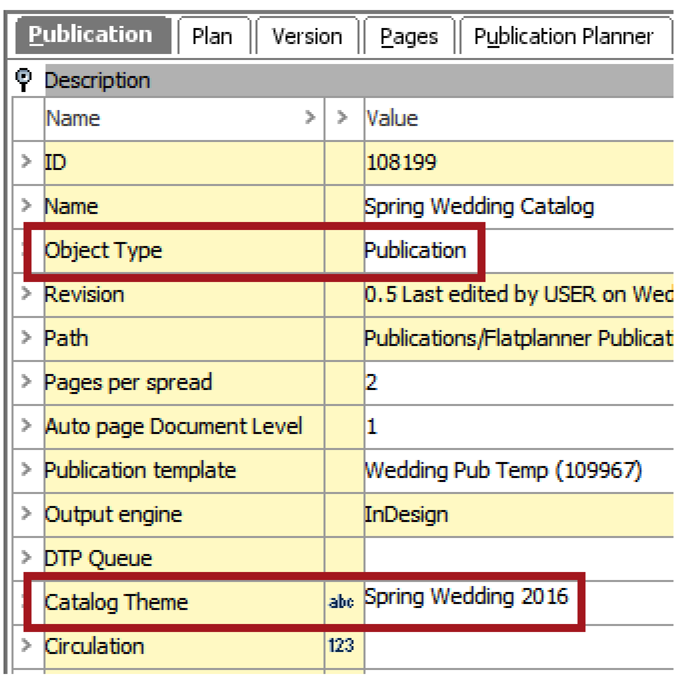
- Under **System Setup**, navigate to **Basic Object Types** > **Planned Page**
- On the **Object Type** tab, click **Add Attribute**, then select the calculated attribute(s) that you would like to place on your publication template. In this example, three calculated attributes have been created: one to pick up values from Section objects (ID = GetInheritedSectionValue), one to pick up values from publication objects (ID = GetInheritedPublicationValue), and one to pick up values from publication group objects (ID = GetInheritedPubGroupValue).



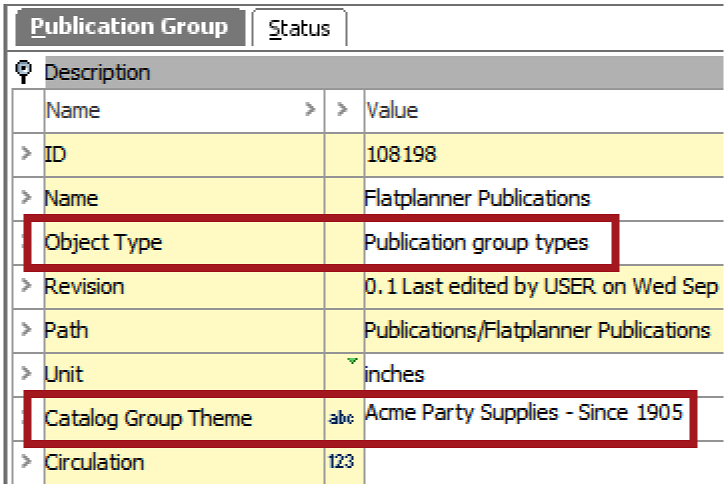
- GetInheritedSectionValue [using the formula **getInheritedPublicationValue**('SectionTheme')] will pick up the value of the description attribute SectionTheme:



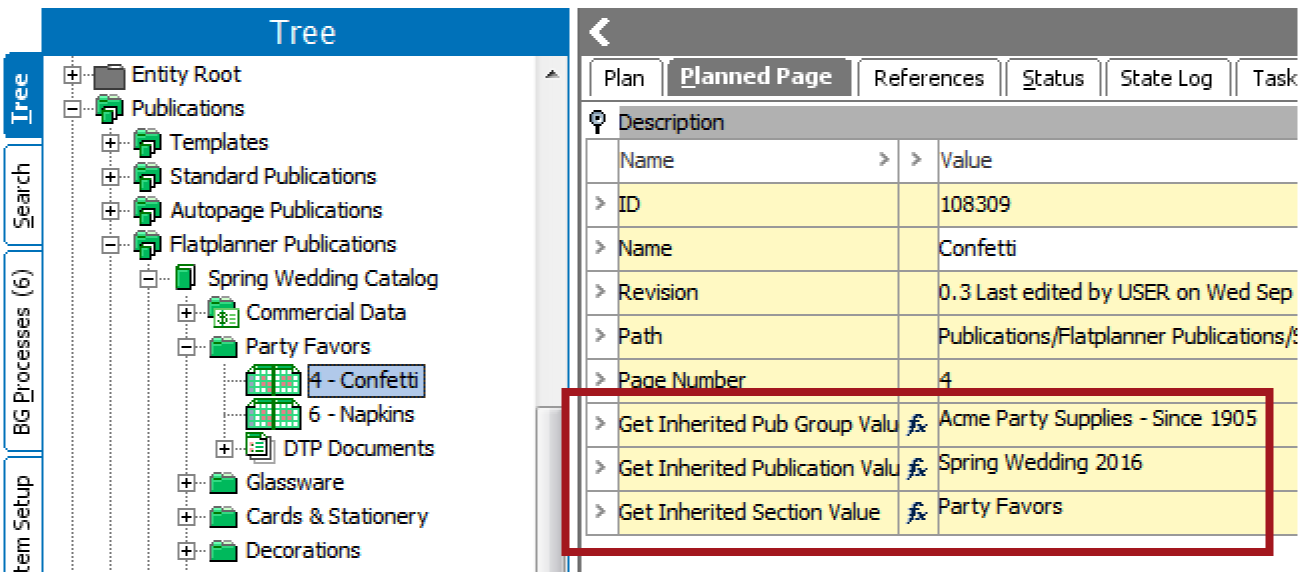
- GetInheritedPublicationValue [using the formula **getInheritedPublicationValue**('CatalogTheme')] will pick up the value of the description attribute CatalogTheme:



- GetInheritedPubGroupValue[using the formula **getInheritedPublicationValue**('CatalogGroupTheme')] will pick up the value of the description attribute CatalogGroupTheme:



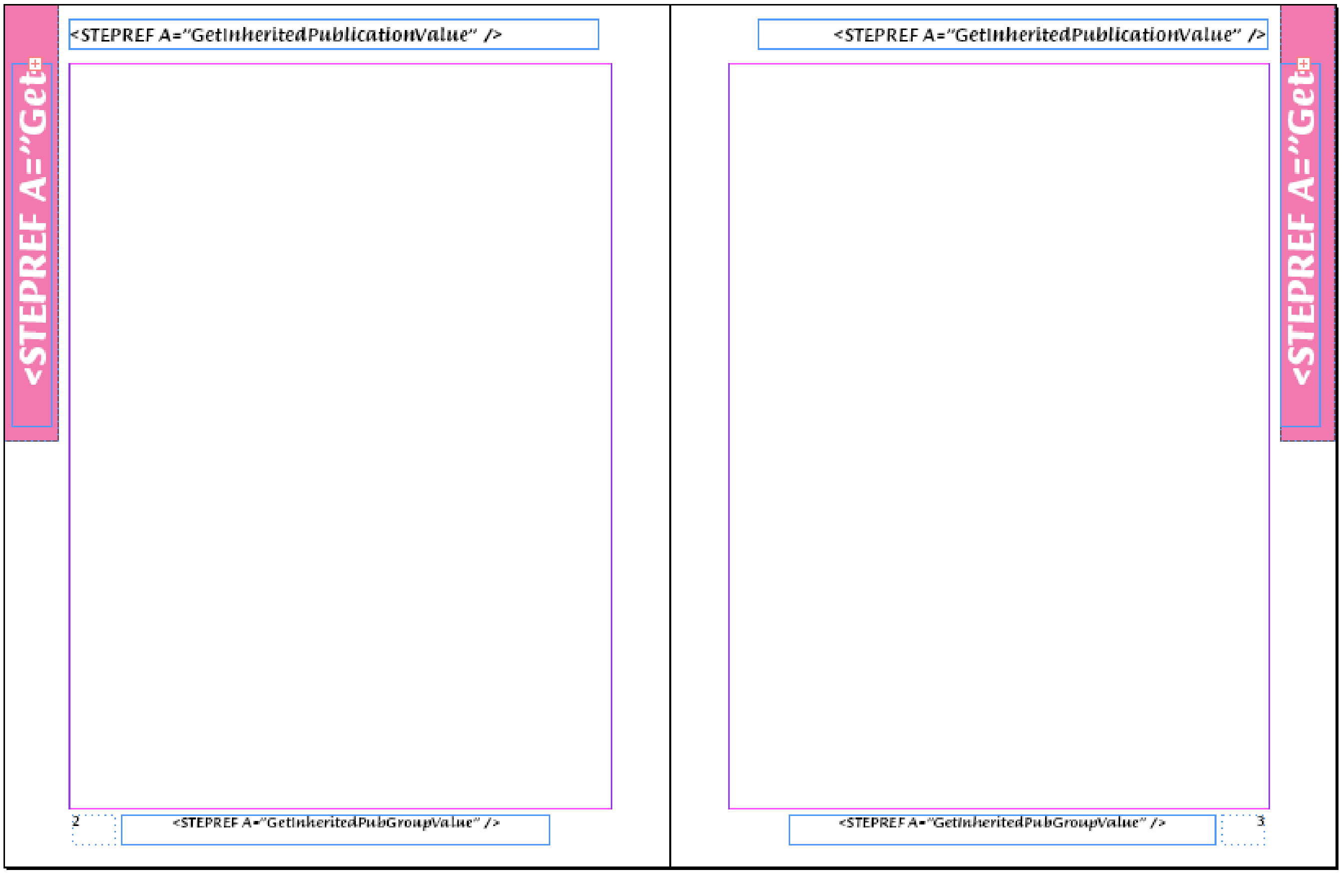
3. Navigate to a Planned Page object to confirm that the values are displaying correctly.



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.

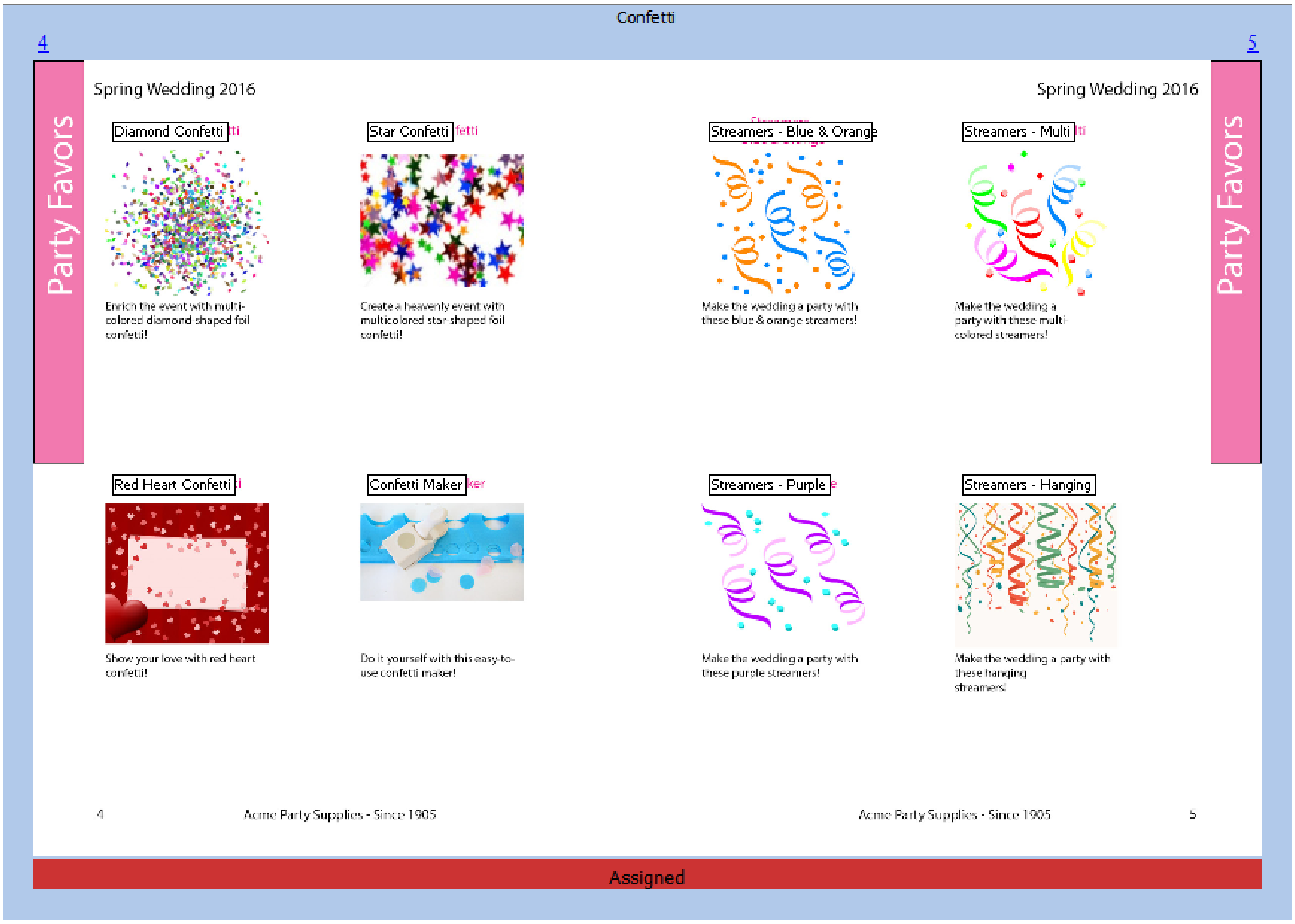
Configuring the Publication Template

1. Place the attributes on the publication template just as you would place attributes on a product template. **Note:** attributes must be placed on the page spread, not the master spread.



2. The publication description attribute values will display on the mounted page in InDesign and the Flatplanner Preview view.


Spring Wedding 2016
Party Favors
Diamond Confetti
Enrich the event with multicolored diamond-shaped foil confetti!
Star Confetti
Create a heavenly event with multicolored star-shaped foil confetti!
Red Heart Confetti
Show your love with red heart confetti!
Confetti Maker
Do it yourself with this easy-to-use confetti maker!
4
Acme Party Supplies - Since 1905
Spring Wedding 2016
Party Favors
Streamers - Blue & Orange
Make the wedding a party with these blue & orange streamers!
Streamers - Multi
Make the wedding a party with these multi-colored streamers!
Streamers - Purple
Make the wedding a party with these purple streamers!
Streamers - Hanging
Make the wedding a party with these hanging streamers!
Acme Party Supplies - Since 1905
5



For More Information

See the **Calculated Attribute Functions** section of the **System Setup** / **Super User** documentation for general information on calculated attribute functions.

See the following sections of the **STEP'n'design** documentation for more information on building and configuring publication templates and product templates:

- Publication Templates
- Product Templates

Generating PDFs

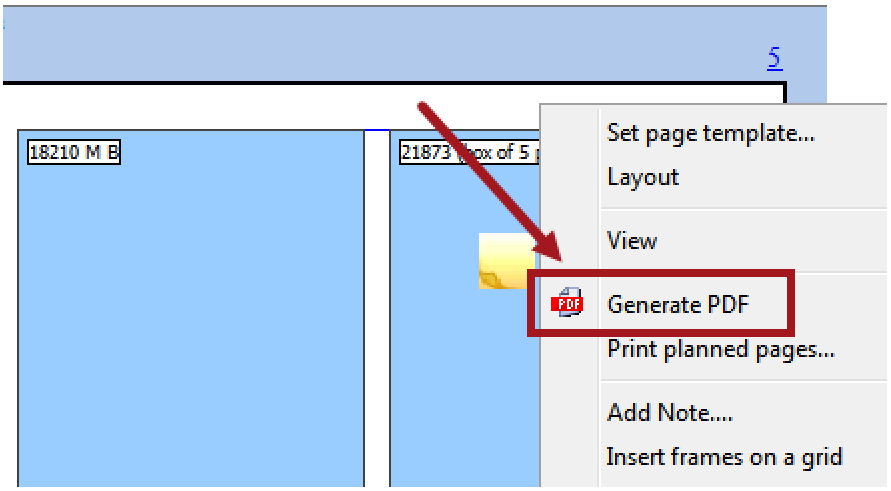
When you have planned your pages in the Publication Planner, you can generate PDF proofs of the planned pages to ensure that they look the way you want them to.

You can also generate a PDF that only includes pages that have already been completed in InDesign and saved back to STEP.

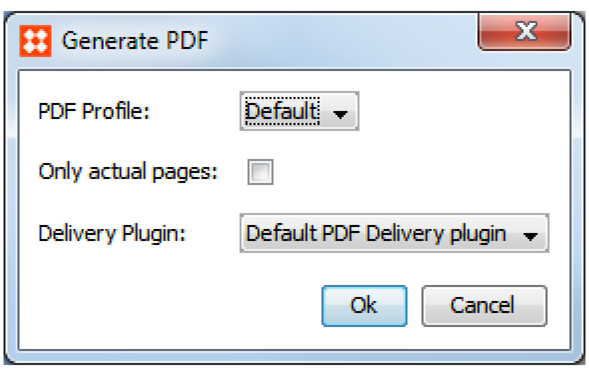
To Generate a PDF from a Publication or Section

1. In the **Tree**, expand the **Publication** hierarchy, and then select the relevant section or spread.
2. On the **Plan** tab, right-click in the white area of the page, and then choose **Generate PDF**. The **Generate PDF** dialog appears.

Note: Clicking on either the left-hand page or the right-hand page will generate a PDF of both pages in the spread.



3. In the **PDF Profile** list, select the preferred profile.



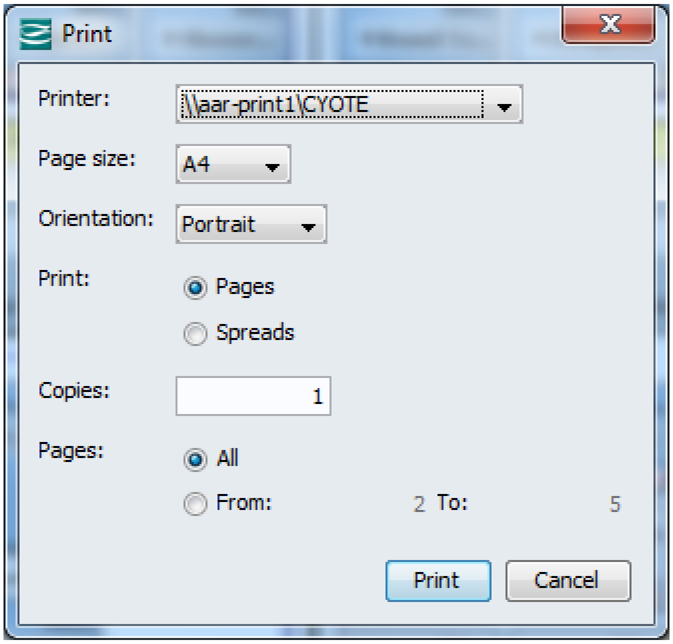
4. If you want the PDF to only include pages that have been completed in InDesign and saved back to STEP, check **Only actual pages**.
5. Click **OK**.

Note: PDF profiles are system dependent. Therefore, the PDF profile is set to Default if no special PDF profiles have been configured for the system. Please contact Stibo Systems if you need additional PDF profiles.

Printing Planned Pages

You can print planned pages from the Promotion Planner.

1. In the **Tree**, expand the publication hierarchy.
2. Click the relevant publication, expand the hierarchy and select the section or spread you want to print.
3. On the **Plan** tab, right-click the white area, and the choose **Print planned pages**. The print dialog appears.



4. From the **Printer** list, select the relevant printer.
5. From the **Page Size** list, select the relevant page size.
6. From the **Orientation** list, select the relevant page orientation.
7. Select **Pages** if you want to print a page on each page or select **Spread** if you want to print a spread on each page.
8. In the **Copies** field, enter the number of copies you want to print.
9. Select **All** to print all pages or select **From** to define the range of pages you want to print.
10. Click **Print**.

About the Publication Planner

The Publication Planner is used to control the sections and pages of a publication. You can perform the following tasks in the Publication Planner:

- Insert or remove pages and sections
- Reorder the sequence of pages and sections
- Apply page templates to pages
- Start and stop workflows
- View information related to the plan page or frame contents

To View the Publication Planner

- In the **Tree**, select a publication or a section, and then click the **Publication Planner** tab.

Using the Publication Planner with Flatplanner Workflows

Using the Publication Planner with Flatplanner workflows is covered in the **Flatplanner Workflows** documentation.

Configuring the Publication Planner Column View

The columns in the Publication Planner are configurable by using the **Column View** dropdown at the top of the editor. The entries in the Column View dropdown are managed by the **View Options** drop down at the top right of the editor. For more information about creating a customized view, see the **Customized Views** documentation.

Customized View Content

You can add or remove the following view content within the Publication Planner.

Content Element	Description
Assignee*	Displays the current user assigned to the spread
DTP update needed	Displays the result of a previously performed comparison between the data held on an actual page for the planned spread and that active in the step database
Frame	Displays the frame ID
Group by section	Adds a tree like control for each section and groups the planned pages under them.
ID	Displays the ID of the first page in the spread.
Name	Displays the name of the spread
Next Milestone Date*	Displays the next milestone date based on the milestone configuration and the workflow's next milestone.
Next Milestone Name*	Displays the next milestone name as defined by the workflow business rule actions.
Page Attribute	Displays the value of an attribute from the planned page (attribute is configurable).

Content Element	Description
Page note count	Display the number of notes applied to a page.
Page Number	Displays the page number of the planned page
Page Template	Displays the page template assigned to the plan
Plan to Actual update needed	Indicates if the plan has been updated since the actual page was last worked on and saved to the database.
Product	Displays the Product assigned to a frame.
Section name	Displays the name of the section
Status	Displays the currently workflow state
Thumbnail	Displays a thumbnail of the actual page if one has been produced for the plan
Traffic Light Name*	Displays the name of the attribute calculated as the milestone date color

*Requires a STEP Workflow component license. The columns Next Milestone Date, Next Milestone Name and Traffic Light Name are colored according to the current date, milestone date and duration / color settings. For more information about how to configure Milestones and Traffic lighting, see the **Publication Milestones** documentation. For general information on Flatplanner workflows, see the **Flatplanner Workflows** documentation.

Sorting / Filtering

Right clicking on the Publication Planner column headers shows a menu that allows the contents to be sorted / filtered and columns to be added / removed from the current view.

Publication Planner Actions

The Publication Planner supports the following actions by right clicking with one or more rows selected. Some of the mentioned actions are described in more details later in this section.

Action	Description
Add Section in	Created a new section on specified level
Create new Section from existing...	Creates a new section in the selected section by duplicating from another.
Add Pages Before Selected Page	Creates additional Flatplan pages
Add Pages After Selected Page/Section	Creates additional Flatplan pages
Autonumber pages	Renumbers the Flatplan pages
Set page template	Sets the page template on the selected Flatplan pages
Remove pages	Deletes the selected spreads
View Plan	Changes the workbench view to show the selected Flatplan
Assign Pages*	Sets the merchandiser assigned to the pages (if workflow is not active for the pages)
Start Workflows*	Starts the workflow for the selected Flatplan pages
Stop Workflows*	Stops the workfow for the selected Flatplan pages
Return task to default group assignment*	Releases a current task that has been claimed by a user to the default group assignment.
Go to workflow process*	Go to the workflow process in the workflow tab.
Create InDesign Package from flatplans	Initiates a process that creates an InDesign package for the Flatplans
Import InDesign Package	Initiates a process that imports an InDesign package

Action	Description
Generate PDF	Initiates a process that creates a PDF of the pages.
Check for update needed...	Initiates a process that compares the STEP data mounted onto the InDesign documents with that in the database and reports if a difference is found.
Update...	Initiates a process that updates STEP data mounted onto the InDesign documents.
Update actual page with plan changes	Initiates a process that adjusts the actual pages for changes made to the Flatplan pages (e.g. product swapped between pages).
Copy table to clipboard for Excel	Copies the data displayed in the publication planner so it can be pasted into a spreadsheet for external purposes.

*Requires a STEP Workflow component license. For more information about how to work with the Flatplanner workflow, see the **Flatplanner Workflows** documentation.

Changing the Page Order in the Publication Planner

You can reorder pages in the Publication Planner.

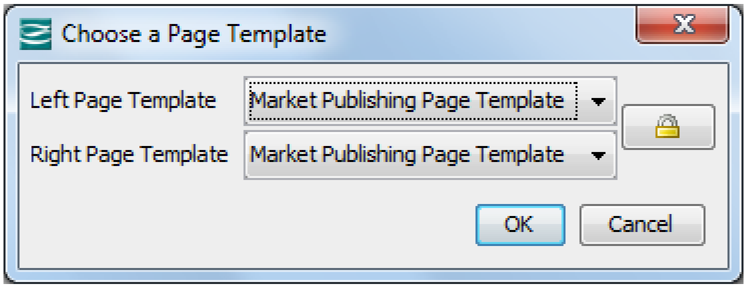
1. In the **Tree**, expand the publication hierarchy, and then click the relevant publication or section.
2. Click the **Publication Planner** tab.
3. Click the **+** sign next to the name of a section to view the pages of the section.
4. Click the row that contains the page that you want to move, and then hold down the left mouse button while you drag and drop the page to its new position.

When a page is moved, the page numbers are automatically updated.

Changing the Page Template in the Publication Planner

In the Publication Planner, you can change the page templates that are used on the different pages.

1. In the **Tree**, expand the publication hierarchy, and then click the relevant publication or section.
2. Click the **Publication Planner** tab.
3. Click the **+** sign next to the name of a section to view the pages of the section.
4. Select the row of the preferred page, right-click, and then choose **Set Page Template**. The **Choose a Page Template** dialog appears.

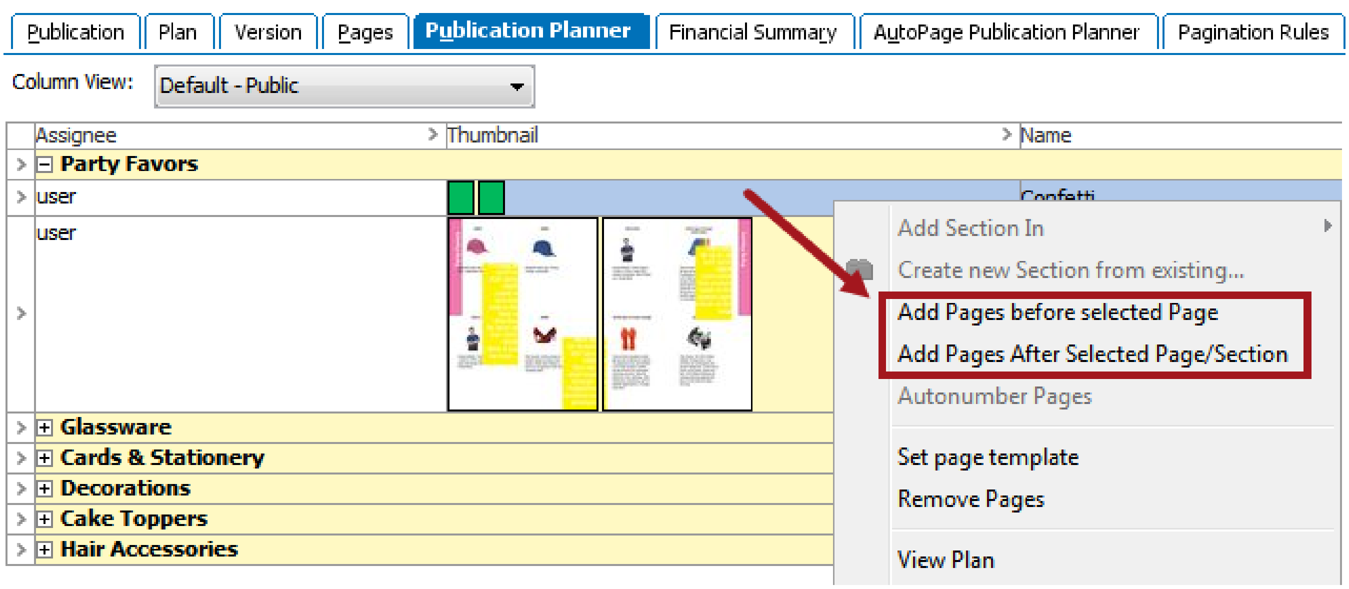


5. From the **Left Page Template** list, select the preferred template. To use different templates on the left and right, click the **Padlock** button to unlock it.
6. Click **OK**.

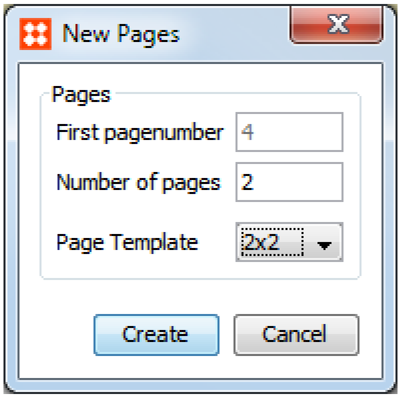
Inserting Pages Into a Section in the Publication Planner

You can use the Publication Planner to manage pages of a publication.

1. In the **Tree**, expand the publication hierarchy, and then click the relevant publication or section.
2. Click the **Publication Planner** tab.
3. Click the **+** sign next to the name of a section to view the pages of the section.
4. Right-click the row of the section where you want to add pages, then choose either **Add Pages before selected Page** or **Add Pages After Selected Page/Section**.



5. The **New Pages** dialog appears.



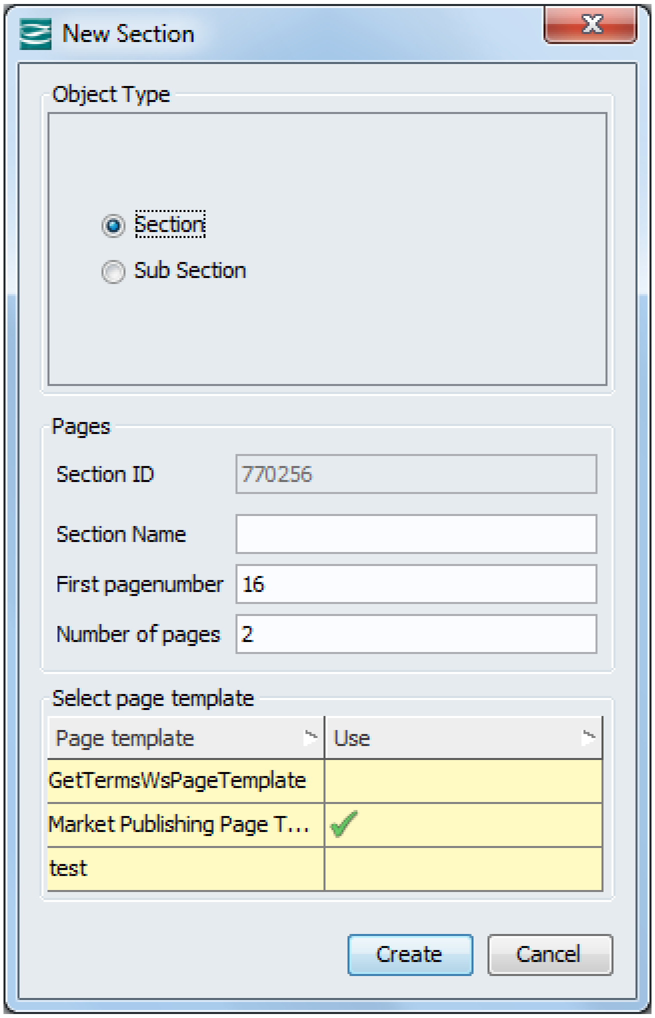
6. In the **Number of pages** field, enter the number of pages you want to add.
7. In the **Page Template** dropdown list, select the template you would like to use for the new pages.
8. Click **Create** to insert the pages.

Inserting Sections in the Publication Planner

The Publication Planner is used to manage the sections within a Flatplanner publication.

1. In the **Tree**, expand the publication hierarchy, and then click the relevant publication or section.
2. Click the **Publication Planner** tab.
3. Select a section, and then right-click the arrow next to the section row. If you want to add a subsection to an existing section, make sure that you have selected the preferred section.

Choose **Add Section In**, and then click either the publication or a section from the list. The **New Section** dialog appears.



1. Select whether you want to add a **Section** or **Sub Section**.
2. In the **Section Name** field, enter the name of the section.
3. In the **First page number** field, enter the page number that is the first page number of the new section.
4. In the **Number of pages** field, enter the number of pages you want the section to have.
5. In the **Select page template** area, click the **Use** field next to the template you want to use. A green check mark appears next to the selected template.
6. Click **Create** to insert the section.

Removing Pages in the Publication Planner

You can use the Publication Planner to remove pages and sections from a publication.

1. In the **Tree**, expand the publication hierarchy, and then click the relevant publication or section.
2. Click the **Publication Planner** tab.
3. Click the **+** sign next to the name of a section to view the contents of the section.

4. Right-click a page, and then choose **Remove Pages**. If you want to remove multiple pages, hold down the SHIFT key while you select the pages.
5. A warning message appears asking you to confirm the deletion. Click **OK** to confirm the deletion.

Exporting and Importing Flatplanner Publications

Three formats are available for the export and import of Flatplans and Flatplanner publications: **Flatplan Excel**, **Publication Excel**, and **STEPXML**.

Using Excel and/or STEPXML files to export and import Flatplanner publications can help reduce the time spent on manual publication-building tasks in the workbench, such as the manual drag and drop of products out of Flatplanner baskets onto Flatplanner frames or the manual linking of product templates to Flatplanner frames. If all product and asset objects are already mapped to Flatplan frames on an importable Excel sheet or STEPXML file, there is not even a need to populate a Flatplanner basket.

The import of Flatplanner publications and Flatplans is suitable for users who prefer to plan their publications before building out planned pages in STEP. For example, businesses that publish sales flyers may receive page planning information from an upstream ERP system that predetermines item placement based on analysis of historical pricing and sales data. In this use case, planning decisions do not need to happen in STEP; users can skip directly to the DTP page building process once their Flatplanner publication is built in STEP with the import.

Even for users who prefer to manually plan and build their pages simultaneously in STEP, the ability to export and import Flatplans and Flatplanner publications greatly simplifies the migration of publications from one STEP system to another, reducing the number of manual steps needed to duplicate and/or rebuild these publications.

The following sections of this documentation explain the information included in the Flatplanner import / export formats, the similarities and differences between them, and where the information contained in these files exists in STEP.

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

Exporting Flatplanner Publications in Excel

The typical first step in using a **Flatplan Excel** or **Publication Excel** sheet to *import* a Flatplanner publication or Flatplan is to *export* a pre-existing Flatplanner publication or Flatplan. This exported Excel file can then be used as a 'template' sheet to import new Flatplanner publications and Flatplans.

The **Flatplan Excel** format is only available for Flatplanner publications and supports the export of section-level Flatplanner information, i.e., Flatplans. A Flatplan—also known as a plan—is composed of planned pages (also known as spreads) and the product and/or asset objects that are linked to the Flatplan frames on these pages. Flatplan Excel sheets contain information about the page templates used on each page and the product templates used on each frame. Additional frame-level information, such as X / Y coordinates and frame height and width, is also included.

While the Flatplan Excel format is only available for Flatplanner publications, the **Publication Excel** format supports all publication types: standard STEP'n'design ('drag and drop'), Flatplanner, and AutoPage. When used to export Flatplanner publications, additional columns with information specific to Flatplanner are included in the sheet.

The Flatplan Excel and Publication Excel formats are nearly identical in structure and functionality, but with a few notable differences. While the **Flatplan Excel** format only includes section-level plan information, the **Publication Excel** format includes more in-depth information about the entire Flatplanner publication.

A **Publication Excel** sheet could later be used to build an entire Flatplanner publication on import, whereas the Flatplan Excel must be used with an existing publication. The **Publication Excel** format also contains the following Flatplanner information that is not present in a basic Flatplan Excel sheet:

- Publication-level information that could be used to later create an entire publication on import (e.g., Publication ID, Version ID, Publication Template ID, and Version ID)
- Publication hierarchy metadata (description) attribute IDs and attribute values
- Pagination rules
- Layer mapping configurations
- IDs and object types of Flatplanner basket contents
- Frame type information (i.e., galley or object)
- Free Text frame contents

Note: The Publication Excel format is only available when exporting from the publication level. It is not available for exports from the publication group level or section level.

Sample Flatplanner Publication Excel Export Spreadsheet

The following screenshots show a sample Flatplanner **Publication Excel** export spreadsheet in three sections—columns A - I, J - R, and S - AG. Columns shaded light yellow appear in both the **Publication Excel** and **Flatplan Excel** formats. Both formats allow only one object per row.

	A	B	C	D	E	F	G	H	I
1	PublicationID	PublicationName	PublicationType	PublicationTemplateID	PubPageTemplateID	VersionID	VersionName	VersionContextID	VersionWorkspaceID
2	121311	Acme Party Supplies	Default publication type	109967					
3									
4						121313	English US	Context1	Main
5									
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19					121163				
20					Doc-dev page temp				
21					4x4				
22					3x3				

	J	K	L	M	N	O	P	Q	R
1	SectionLevel	SectionID	SectionName	SectionTypeID	MetaDataAttributeID	MetaDataAttributeValue	RuleSettings	BasketObjectID	BasketObjectType
2							<Action ID="PublicationTemplateSpreadIndexAction" Ty		
3					CatalogTheme	Acme Party Supplies			
4									
5								121171	Product
6								121177	Product
7								121178	Product
8								121179	Product
9								121184	Product
10								121192	Product
11								121193	Product
12								121180	Product
13								121182	Product
14								121183	Product
15								121190	Product
16								121218	Product
17								121175	Product
18								121176	Product
19								121200	Asset
20									
21									
22									
23									
24									
25									
26									
27	1	121314	Party Hats	Section					
28					SectionTheme	Party Hats			
29	2	121316	Party Hats	Section					
30					SectionTheme	Party Hats			

	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG
1	PageNumber	PageName	PageTemplateID	PagePickupID	MountObjectID	MountObjectType	ProductTemplateID	FrameID	X	Y	Width	Height	FrameType	TextContent	AssignedUserID
31	2	Party Hats	121163												
32							121324	7917	0.85	7.25	6.9	3.0	Galley		
33					121171	Product									
34					121177	Product									
35					121190	Product									
36	3		121163												
37							121324	6552	0.75	0.75	3.37	9.5	Galley		
38					121193	Product									
39					121178	Product									
40					121179	Product									
41															
42															
43															
44	4	Confetti	Doc-dev page temp												DTPUSER
45					109954	Product	109964	200	1.0	0.75	3.25	4.63	Object		
46					109955	Product	109964	201	4.52	0.75	3.25	4.62	Object		
47					121200	Asset	109964	202	1.0	5.62	3.25	4.63	Object		
48					109953	Product	109964	203	4.52	5.62	3.25	4.63	Object		
49								204	3.03	4.03	2.56	0.94	Object	Fun for everyone!	
50	5	Confetti	Doc-dev page temp												
51					110049	Product	109964	200	0.75	0.75	3.25	4.63	Object		
52					110047	Product	109964	201	4.25	0.75	3.25	4.62	Object		
53					110046	Product	109964	202	0.75	5.62	3.25	4.63	Object		
54					110050	Product	109964	203	4.25	5.62	3.25	4.63	Object		
55	6	Napkins		121073											DTPUSER
56					109954	Product	121073	200	1.0	0.75	3.25	4.63	Object		
57					109955	Product	121073	201	4.52	0.75	3.25	4.62	Object		
58					109951	Product	121073	202	1.0	5.62	3.25	4.63	Object		
59					109953	Product	121073	203	4.52	5.62	3.25	4.63	Object		

Contents of Flatplanner Publication Excel Exports

The following table outlines the contents of both Excel formats available for Flatplanner Publication Excel exports—**Publication Excel** and **Flatplan Excel**—in the order that the columns appear:

Column Header	Description	Publication Excel	Flatplan Excel
PublicationID	STEP ID of exported publication	X	
PublicationName	STEP Name of exported publication	X	
PublicationType	Object type ID of exported publication	X	
PublicationTemplateID	STEP ID of publication template linked to the exported publication	X	
PubPageTemplateID	STEP ID of page template(s) linked to the exported publication	X	
VersionID	STEP ID of the publication version(s) of the exported publication	X	
VersionName	STEP Name of the publication version(s) of the exported publication	X	
VersionContextID	STEP ID of the context(s) used in the publication version(s) of the exported publication	X	
VersionWorkspaceID	STEP ID of the workspace(s) used in the publication version(s) of the exported publication	X	
SectionLevel	A number that represents whether the section is a top-level section (1) or a subsection (2, 3, 4, etc.)	X	
SectionID	STEP ID of the exported publication section(s)	X	X
SectionName	STEP Name of the exported publication section(s)	X	X
SectionTypeID	Object type ID of the exported publication section(s)	X	X
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)	X	

Column Header	Description	Publication Excel	Flatplan Excel
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)	X	
RuleSettings	Pagination rules used in the publication(s) and sections **Example**: <Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parametertemplateSpreadIndex="1"> <Condition ID="AlwaysCondition" /> </Action>	X	
BasketObjectID	STEP ID of the product(s) and/or asset(s) linked into the Flatplanner Basket	X	
BasketObjectType	Value will either be 'Product' or 'Asset' depending on whether a product object or an asset object is linked to the Flatplanner Basket. 'Product' and 'Asset' are generic terms and do not specify the exact object types of the products or assets.	X	
PageNumber	Page number of the planned page	X	X
PageName	STEP Name of the planned page	X	X
PageTemplateID	STEP ID of the page template linked to the planned page	X	X
PagePickupID	STEP ID of the actual page that was picked up as the layout for the planned page	X	
MountObjectID	STEP ID of the product or asset object linked to the Flatplanner frame	X	X
MountObjectType	Value will either be 'Product' or 'Asset' depending on whether a product object or an asset object is linked to the Flatplanner frame. 'Object' and 'Asset' are generic terms and do not specify the exact object types of the	X	X

Column Header	Description	Publication Excel	Flatplan Excel
	products or assets.		
ProductTemplateID	• In the **Publication Excel** format, this column contains the STEP ID(s) of the product template(s) linked to the exported **publication** and each individual **Flatplan frame** • In the **Flatplan Excel** format, this column only contains the STEP ID(s) of the product template(s) linked to each individual **Flatplan frame**	X	X
FrameID	STEP ID of the Flatplanner frame	X	X
X	X coordinate of the Flatplanner frame on the planned page	X	X
Y	Y coordinate of the Flatplanner frame on the planned page	X	X
Width	Width of the Flatplanner frame	X	X
Height	Height of the Flatplanner frame	X	X
FrameType	Value will either be 'Object' or 'Galley', depending on whether the Flatplanner frame contains a product, asset, or free text ('Object') or is a Galley text frame ('Galley')	X	
TextContent	Free text content of the Flatplanner frame	X	
AssignedUserID	STEP user who is currently assigned the planned page in the Flatplanner workflow	X	X

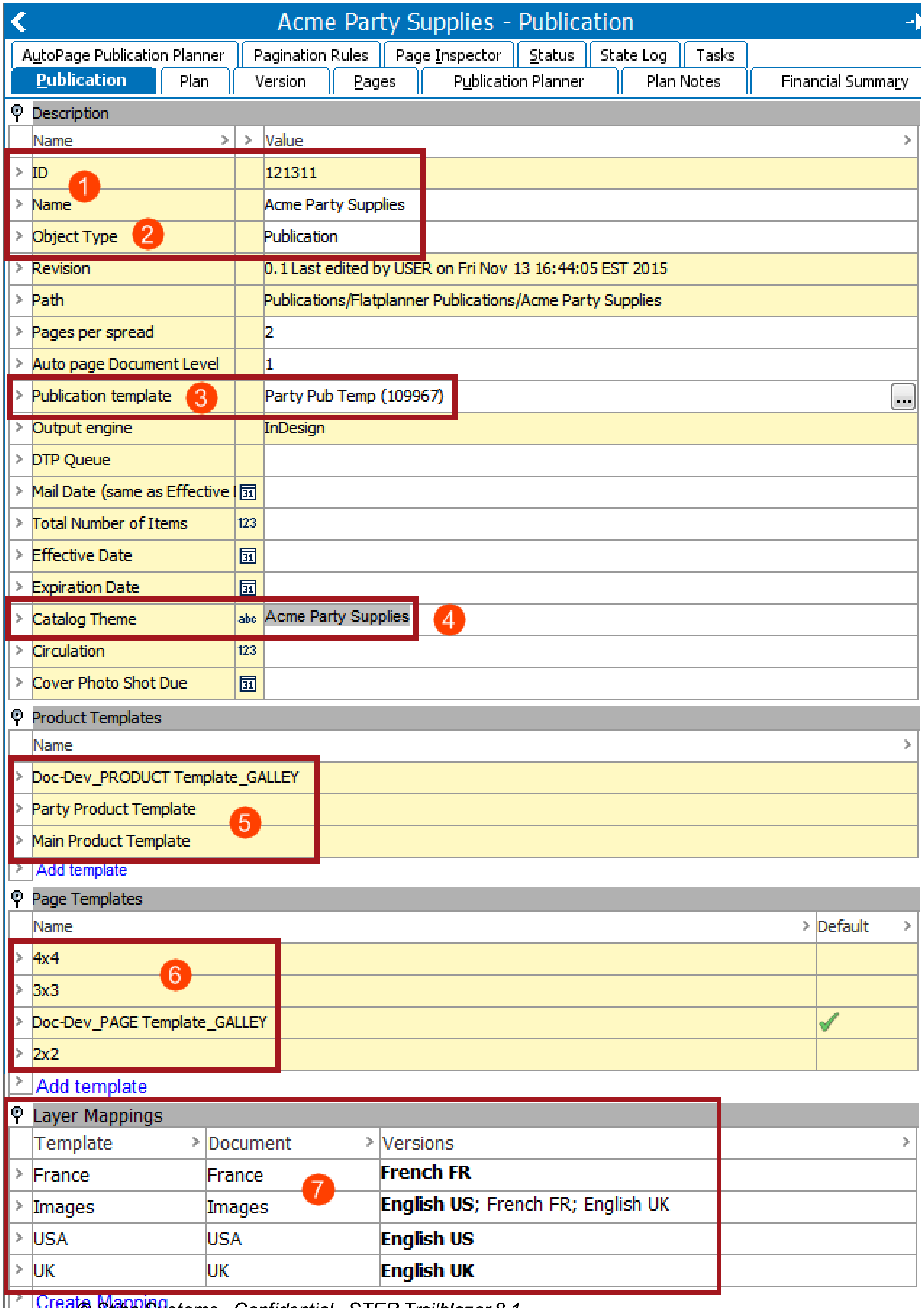
Location of Flatplanner Publication Export Information in STEP

The following sections use a sample Flatplanner publication to illustrate where the information included in Flatplanner **Publication Excel** and **Flatplan Excel** exports resides in the STEP Workbench.

Publication Tab

1. The **PublicationID** and **PublicationName** columns will contain the STEP ID and STEP Name of the publication, respectively.
2. The **PublicationType** column will contain the object type ID of the publication.
3. The **PublicationTemplateID** column will contain the STEP ID of the publication template.
4. The **MetaDataAttributeID** and **MetaDataAttributeValue** columns will contain the STEP ID(s) and STEP Names(s) of populated metadata attributes that appear on the publication and section(s). Note that if a publication (or section) has linked metadata attributes but these attributes do not contain values, the **MetaDataAttributeID** and **MetaDataAttributeValue** columns will not appear on the exported sheet.
5. The **ProductTemplateID** column will contain the STEP ID(s) of the product template(s).
6. The **PubPageTemplateID** column will contain the STEP ID(s) of the page template(s).
7. The **LayerMappingTemplate** column will contain the name of the layer in the templates (publication, product, and InDesign-created page templates); **LayerMappingDocument** will contain the name of the corresponding layer in the Publication Document (mounting page); and **LayerMappingOwner** will display whether the publication version to which the layer is mapped is the owner of the layer—value of 'true' or 'false.' In the following screenshot, 'English US' (displayed in bold) is the owner of the 'Images' layer.

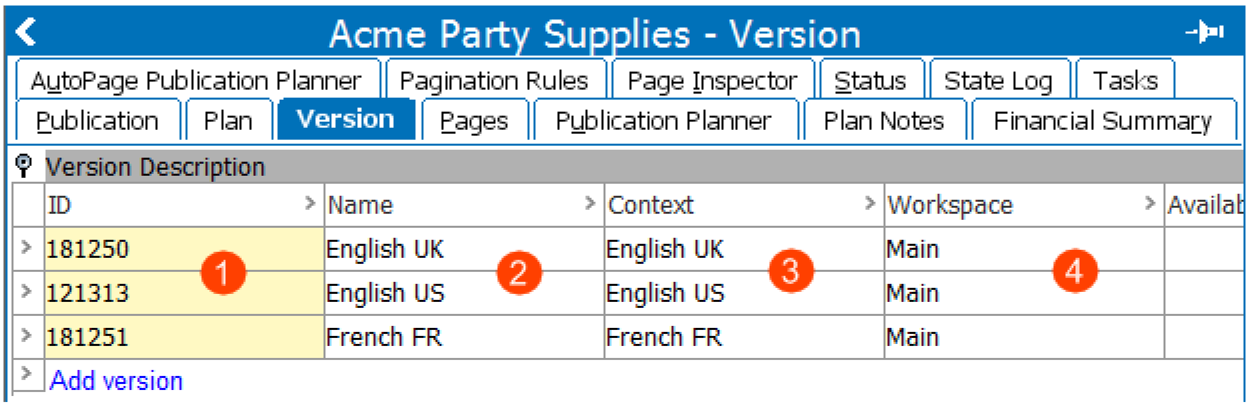
Note: When exporting a 'model' Flatplanner publication in order to use the resulting publication Excel sheet as a template for later Flatplanner publication imports, it is recommended to populate at least one metadata attribute on the publication (and each section) with a 'dummy' value. This ensures that the MetaDataAttributeID and MetaDataAttributeValue columns appear on the 'template' sheet and will not have to be manually inserted later.



Acme Party Supplies - Publication
AutoPage Publication Planner
Pagination Rules
Page Inspector
Status
State Log
Tasks
Publication
Plan
Version
Pages
Publication Planner
Plan Notes
Financial Summary
Description
Name
Value
ID
121311
Name
Acme Party Supplies
Object Type
Publication
Revision
0.1 Last edited by USER on Fri Nov 13 16:44:05 EST 2015
Path
Publications/Flatplanner Publications/Acme Party Supplies
Pages per spread
2
Auto page Document Level
1
Publication template
Party Pub Temp (109967)
Output engine
InDesign
DTP Queue
Mail Date (same as Effective I
Total Number of Items
Effective Date
Expiration Date
Catalog Theme
Acme Party Supplies
Circulation
Cover Photo Shot Due
Product Templates
Name
Doc-Dev_PRODUCT Template_GALLEY
Party Product Template
Main Product Template
Add template
Page Templates
Name
Default
4x4
3x3
Doc-Dev_PAGE Template_GALLEY
2x2
Add template
Layer Mappings
Template
Document
Versions
France
France
French FR
Images
Images
English US; French FR; English UK
USA
USA
English US
UK
UK
English UK
Create Mapping
1
2
3
4
5
6
7

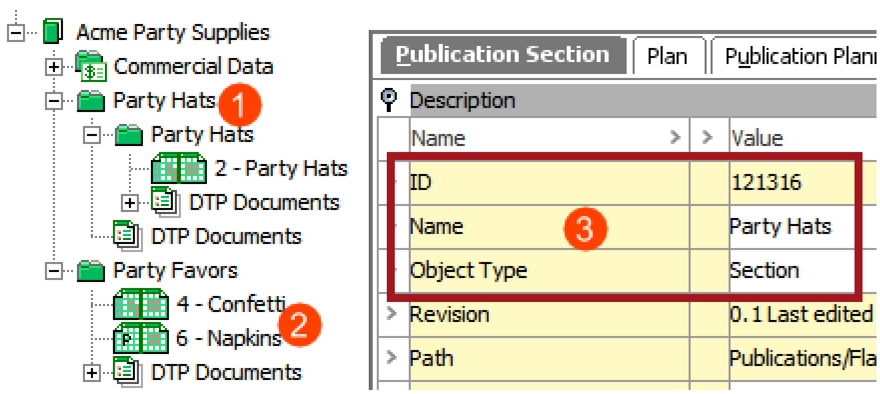
Version Tab

1. The **VersionID** column will contain the STEP ID(s) of the publication version(s).
2. The **VersionName** column will contain the STEP Name(s) of the publication version(s).
3. The **VersionContextID** column will contain the STEP ID(s) of the context(s) to which each publication version is linked. (**Note:** The context *name* is displayed in the workbench.)
4. The **VersionWorkspaceID** column will contain the STEP ID of the workspace to which each publication version is linked (will either be 'Main' or 'Approved').



Sections and Planned Pages

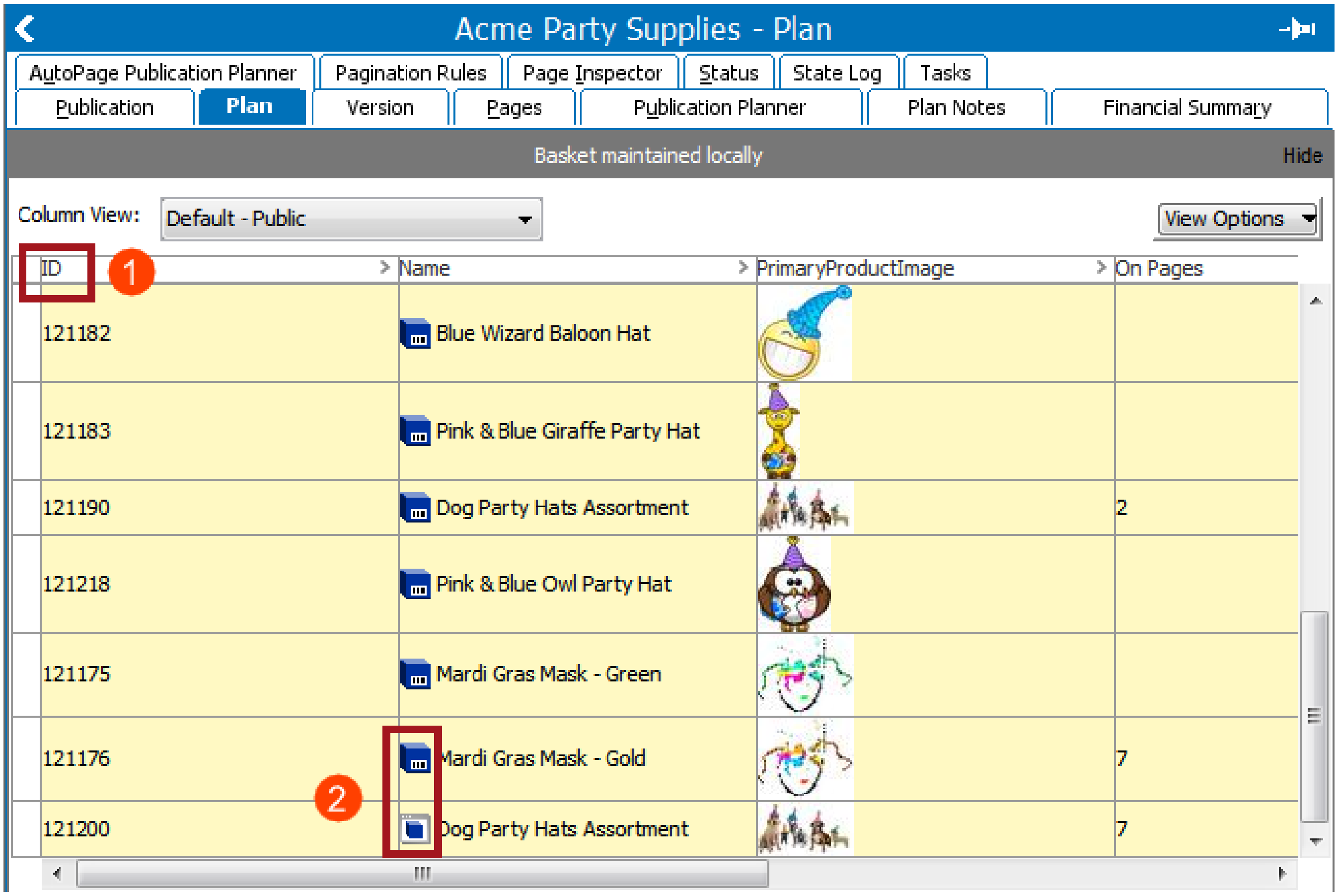
1. The **SectionLevel** column will contain a number that represents whether the section is a top-level section (1) or a subsection (2, 3, 4, etc.).
2. The **PageNumber** and **PageName** columns will contain the page number and name of planned pages.
3. The **SectionID**, **SectionName**, and **SectionTypeID** columns will contain the STEP IDs, STEP Name, and STEP object type of all sections and subsections.



Plan Tab – Basket

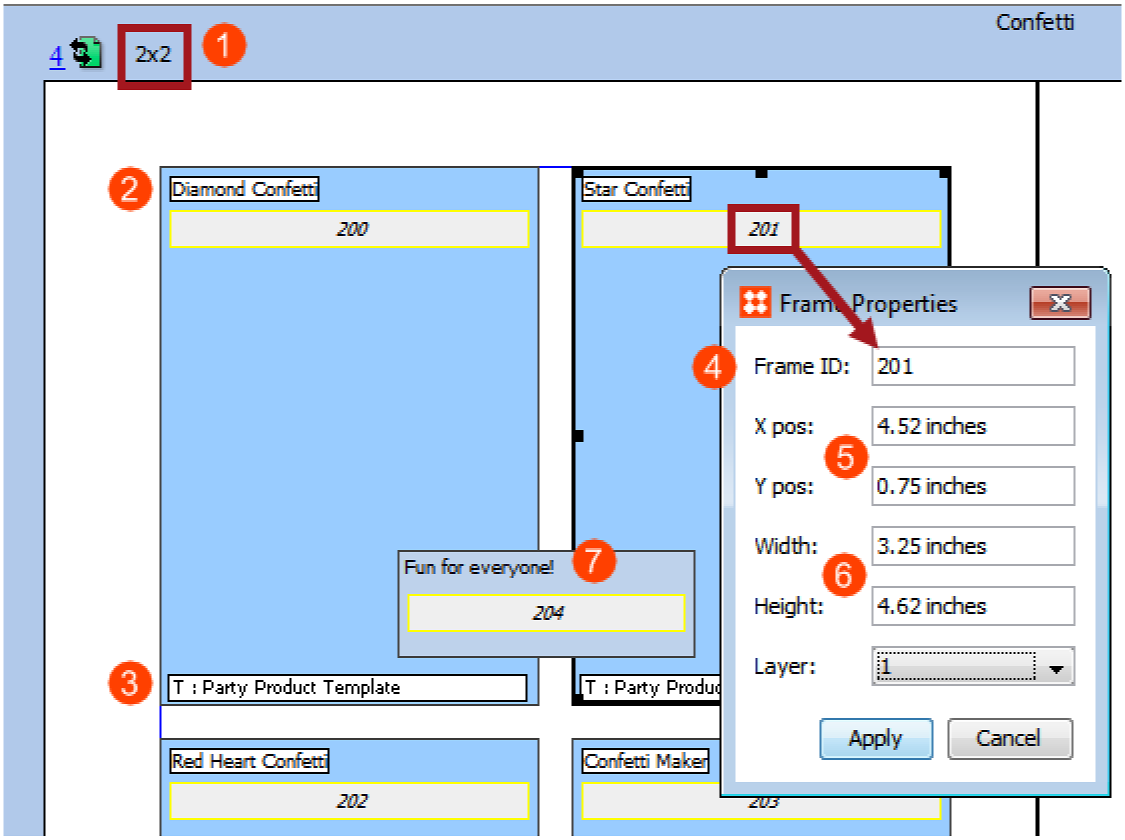
1. The **BasketObjectID** column will contain the STEP ID of the objects linked into the Flatplanner Basket

2. The **BasketObjectType** column will contain 'Product' or 'Asset' depending on whether a product object or an asset object is linked to the Flatplanner Basket.



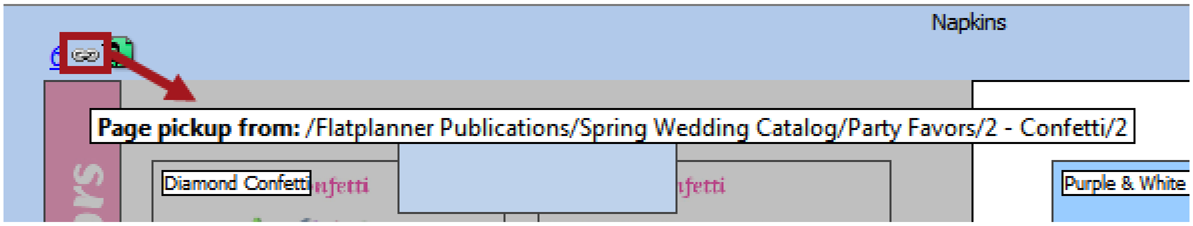
Plan Tab – Page Information

1. The **PageTemplateID** column will contain the STEP ID of the page template used on the Flatplan page. (**Note:** The page template *name* is displayed in the Plan view in the Workbench.)
2. The **MountObjectID** column will contain the STEP ID of the object linked to the Flatplanner frame. (**Note**: The object *name* is displayed in the Plan view in the Workbench.)
3. The **ProductTemplateID** column will contain the STEP ID of the product template linked to the Flatplanner frame. (**Note:** the product template *name* is displayed in the Plan view in the workbench.)
4. The **FrameID** column will contain the STEP ID of the Flatplanner frame.
5. The **X** and **Y** columns will contain the X and Y coordinates of the Flatplanner frame.
6. The **Width** and **Height** columns will contain the dimensions of the Flatplanner frame.
7. the **TextContent** frame will contain the content of Free Text frames.

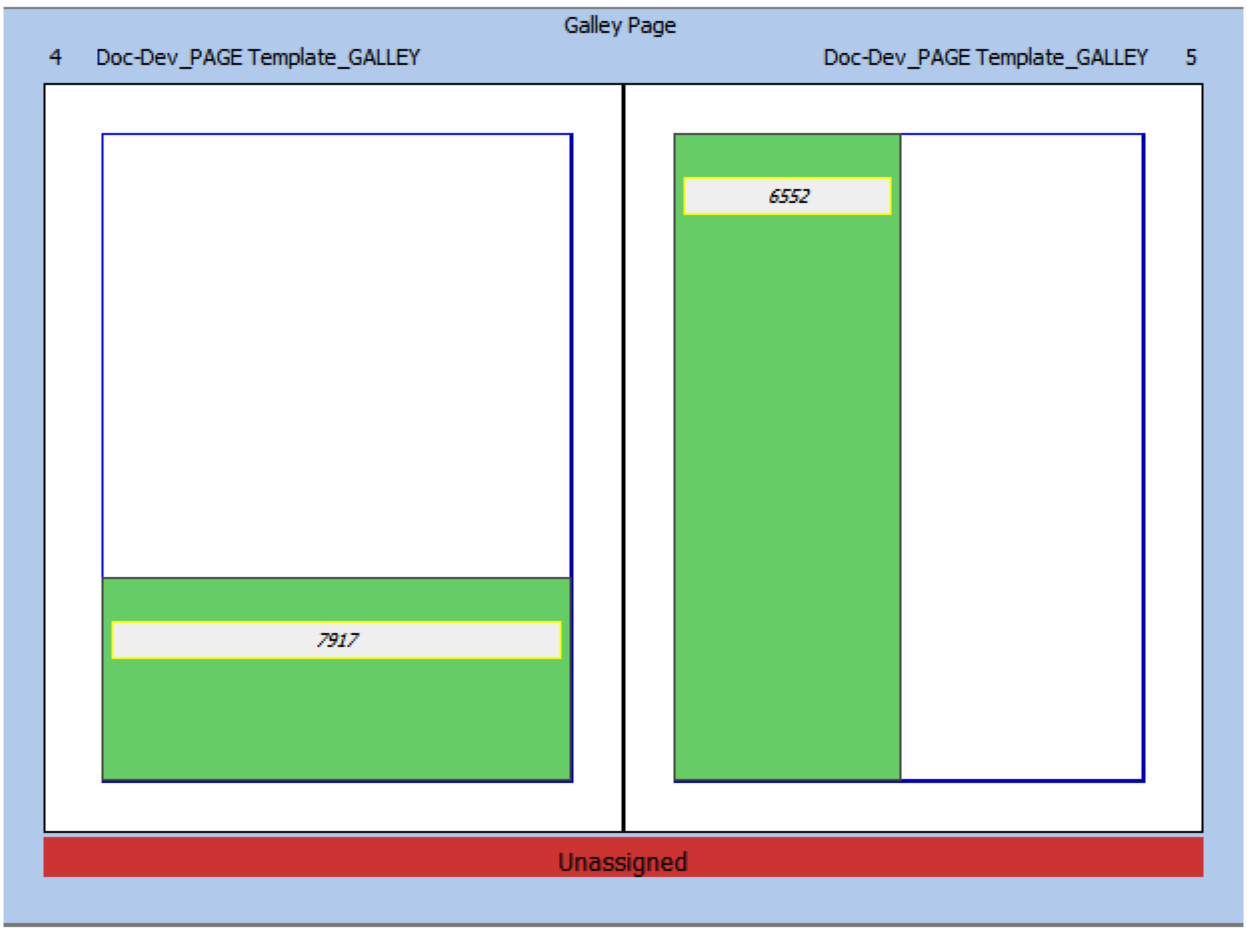


8. The **MountObjectType** column will contain 'Product' or 'Asset' depending on whether a product object (left) or an asset object (right) is linked to the Flatplanner frame.

9. The **PagePickupID** column will contain the STEP ID of the Actual Page that was picked up as the layout for the planned page. (**Note:** The *link* to the actual page is displayed in the tooltip text in the Plan view.)

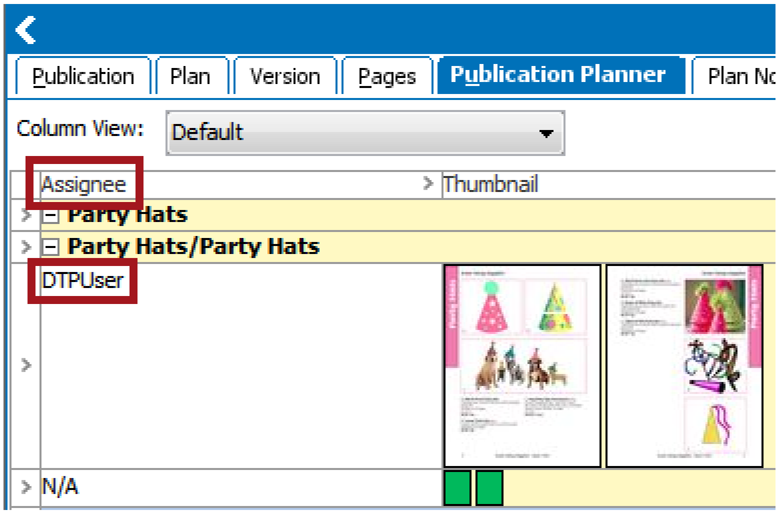


10. The **FrameType** column will contain either 'Object' or 'Galley' depending on whether a standard page template (blue frames) or Galley page template (green frames) is used on the page. Pictured below is a Galley page template as viewed in the Plan view.



Publication Planner Tab

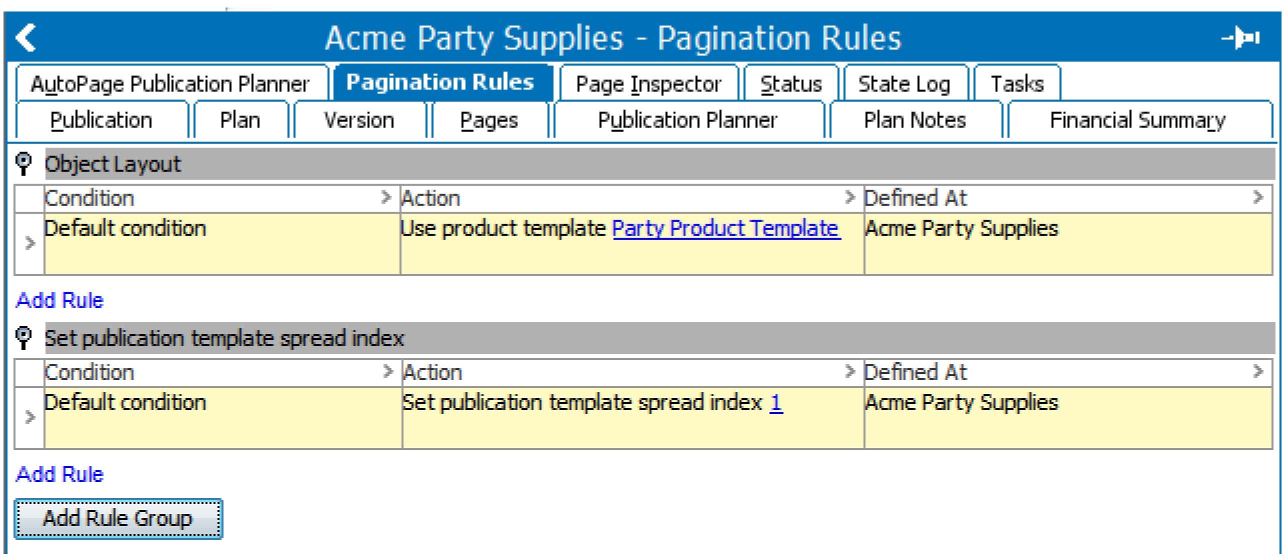
The **AssignedUserID** column will display the User who has been assigned the page in the Flatplanner workflow.



Pagination Rules Tab

STEPXML code for **Pagination Rules** linked to the publication and/or sections will be included in the **RuleSettings** column. The screenshot below shows a pagination rule set at the top level of the publication. Note that if a publication has no pagination rules, the **RuleSettings** column will not appear on the exported sheet.

Note: When exporting a 'model' publication in order to use the resulting Publication Excel sheet as a template for later publication imports, it is recommended to manually set up the desired pagination rules first. This ensures that the **RuleSettings** column appears on the 'template' sheet and will not have to be manually inserted later.



Importing Flatplanner Publications in Excel

Entire Flatplanner publications can be created or updated with the import of a **Publication Excel** spreadsheet. For existing Flatplanner publications, the **Flatplan Excel** format can be used to create or update sections and Flatplans, which are the planned pages (spreads) within the sections.

The typical first step in importing a Flatplanner publication and/or Flatplan is to *export* a pre-existing Flatplanner publication. The resulting Publication Excel or Flatplan Excel file can then be used as a 'template' sheet for new Flatplanner publications or Flatplans, i.e., existing information on the export sheet will be replaced with new information for the subsequent import.

For more information on *exporting* Flatplanner publications in either Excel format, see the **Exporting Flatplanner Publications in Excel** topic.

Importing a Flatplanner Publication Excel Sheet

The steps to import or update a Flatplanner publication using a **Publication Excel** sheet are nearly identical to those of importing a Publication Excel for any other publication type, with the exception of the additional Flatplanner-specific columns needed for Flatplanner publications.

While some fields may be left blank on the Publication Excel sheet to successfully create a new Flatplanner publication (e.g., PublicationName, MetaDataAttributeID, and RuleSettings) all Flatplanner-specific fields on the Publication Excel sheet must be filled out if your intention is to update an existing Flatplanner publication. If you want to create a *new* Flatplanner publication or Flatplan—and you have configured the STEP IDs to autogenerate for your publication, section, and version object types—then the ID fields for these object types should be left blank.

For step-by-step **Publication Excel** import instructions, see the **Importing a Publication Excel Sheet** section of the **STEP'n'design** documentation.

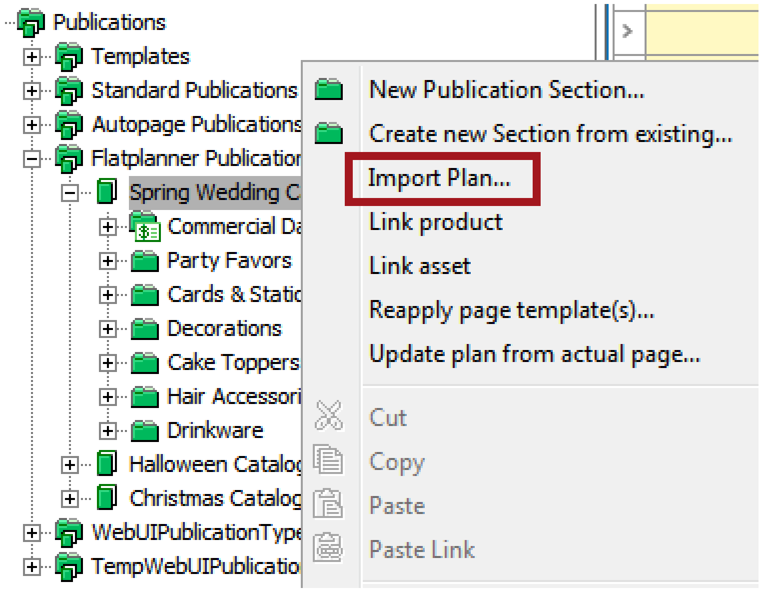
Importing a Flatplan Excel Sheet

Flatplan Excel sheets can be imported either at the publication or section level. The following screenshots show a sample Flatplan Excel spreadsheet that could be used to create two sections and nine pages of a Flatplanner publication.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	SectionID	SectionName	SectionTypeID	PageNumber	PageName	PageTemplateID	MountObjectID	MountObjectType	ProductTemplateID	FrameID	X	Y	Width	Height	AssignedUserID
2		Party Hats NEW	Section	2	Party Hats	121163									
3				3		121163									
4				4	Galley Page	121163									
5				5		121163									
6		Party Favors NEW	Section	4	Confetti	Doc-dev page temp	109954	Product	121385	200	1.0	0.75	3.25	4.63	DTPUSER
7							109955	Product	121385	201	4.52	0.75	3.25	4.62	
8							109951	Product	109964	202	1.0	5.62	3.25	4.63	
9							109953	Product	109964	203	4.52	5.62	3.25	4.63	
10										204	3.03	4.03	2.56	0.94	
11				5	Confetti	Doc-dev page temp	110049	Product	109964	200	0.75	0.75	3.25	4.63	
12							110047	Product	109964	201	4.25	0.75	3.25	4.62	
13							110046	Product	109964	202	0.75	5.62	3.25	4.63	
14							110050	Product	109964	203	4.25	5.62	3.25	4.63	
15				6	Napkins		109954	Product		200	1.0	0.75	3.25	4.63	USER
16							109955	Product		201	4.52	0.75	3.25	4.62	
17							109951	Product		202	1.0	5.62	3.25	4.63	
18							109953	Product		203	4.52	5.62	3.25	4.63	
19										204	3.24	0.29	2.56	0.94	
20				7	Napkins	Doc-dev page temp	121176	Product	109964	201	4.38	0.75	3.28	4.63	
21							121200	Asset		202	0.75	5.62	6.89	4.63	
22							121178	Product	109964	UpperLeft	0.75	0.75	3.38	4.63	
23				8	Children's Party Hats	Doc-dev page temp	121177	Product	121385	201	4.38	0.75	3.38	4.62	
24							121178	Product	121385	202	0.85	5.62	3.28	4.63	
25							121179	Product	121385	203	4.38	5.62	3.38	4.63	
26							121171	Product	121385	UpperLeft	0.85	0.78	3.28	4.63	
27				9		Doc-dev page temp	121205	Asset		201	4.38	0.75	3.28	4.63	
28							121218	Product	121385	202	0.75	5.62	3.38	4.63	
29							121183	Product	121385	203	4.38	5.62	3.28	4.63	
30							121182	Product	121385	UpperLeft	0.75	0.75	3.38	4.63	

Steps to Import a Flatplan Excel Sheet

1. Right-click on the publication or section object into which you would like to import your sheet. Select **Import Plan**.



2. The **Select Excel File** dialog will appear. Navigate to your Flatplan Excel import sheet and click **Open**.
3. The **Save Import Configuration** dialog will appear. Click **OK**. (Though you have the option to save your import configuration on this screen, there is no real need to do so, as no mapping is required for a Flatplan Excel import.)
4. The import process will begin automatically. Click **Go to process** on the **Starting process Importing** dialog if you would like to monitor the import Background Process as the Plan imports.

Considerations and Limitations

- **Flatplan Excel** files cannot be imported using File > Import > Data. Flatplan Excel sheets must be imported by a right-click action on either publication or section objects.
- Frame sizes and X / Y coordinates cannot be altered with Publication Excel or Flatplan Excel imports. Frame sizes will remain the same size as specified by the page template that is linked to the page.

Exporting and Importing Flatplanner Publications in STEPXML

Flatplanner publications can be exported and imported using the STEPXML format.

This topic explains the manual process for exporting Flatplanner publications in STEPXML using the **Export Manager** in the STEP Workbench, the outbound parameters available for Flatplanner publications, a sample XML file, and a description of the tags inside the resulting STEPXML file.

This topic details the most common tags that will appear in a STEPXML export of a Flatplanner publication. For a comprehensive list of STEPXML tags, refer to the STEPXML **XSD** file located in the **STEP API** documentation, which is accessible from the WebStart page of your STEP instance.

Importing a Flatplanner Publication in STEPXML

Product, asset, and/or classification objects can be linked to the frames of Flatplanner planned pages by importing a STEPXML file. This same file can also be used to create the publication structure, the publication, and to link the relevant publication template, page templates, and product templates to the publication, the planned pages, and the page frames, respectively. An example of a STEPXML file that can be used to import a Flatplanner publication is provided later in this topic in the 'File Example' section.

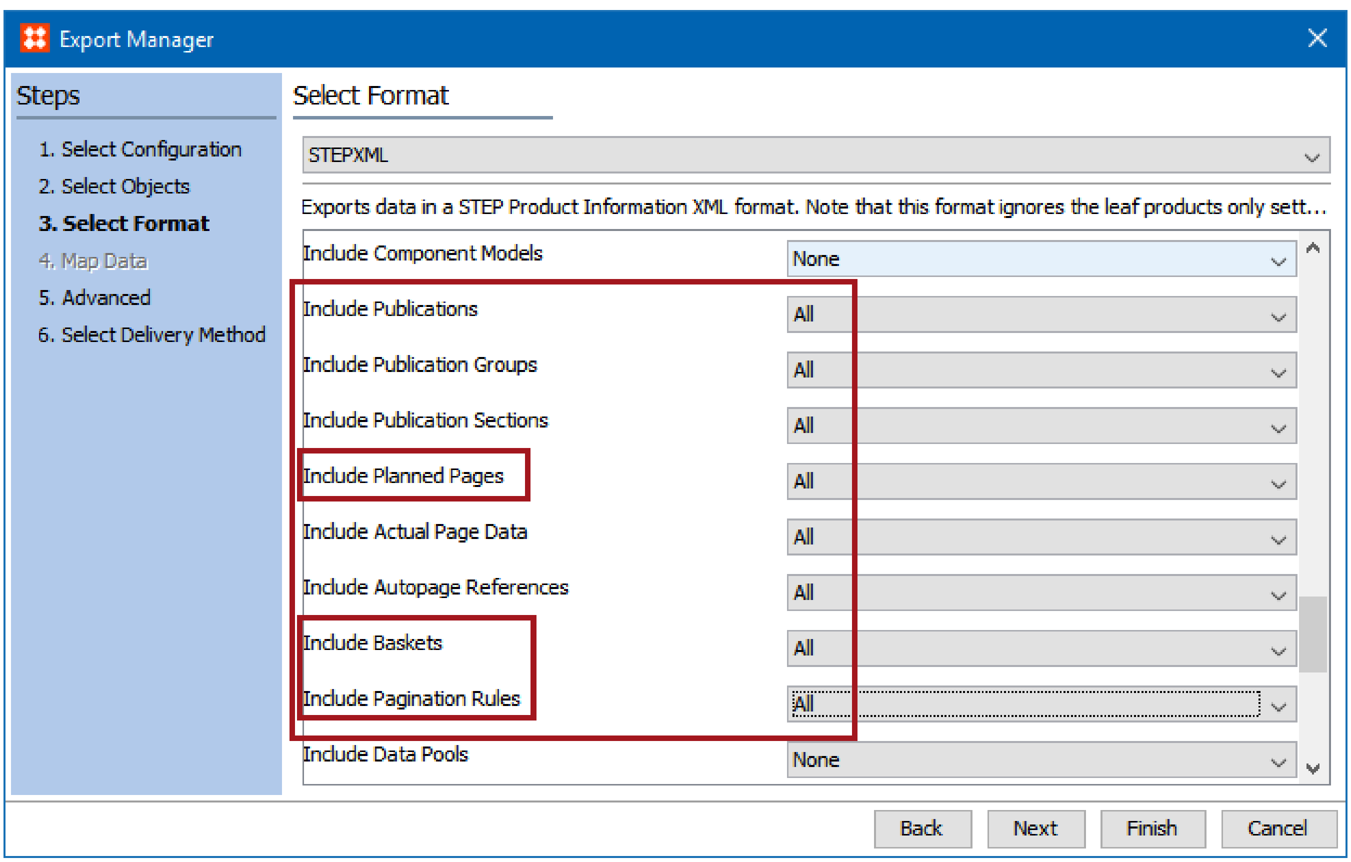
Instructions on how to import the STEPXML file itself are not detailed in this topic since the steps are the same as those for importing any other type of data into STEP using STEPXML.

For more information, see the **Import Manager** section of the **Data Exchange** documentation.

Exporting a Flatplanner Publication in STEPXML

The steps to export a Flatplanner publication in STEPXML are the same as those for exporting any other type of publication (standard 'drag and drop' or AutoPage), except a few additional Flatplanner-specific options are chosen when selecting the STEPXML outbound parameters.

1. To initiate the export, follow the initial steps outlined in **Exporting and Importing Publications in STEPXML** in the **STEP'n'design** documentation.
2. On the Select Format screen (step 3), after choosing STEPXML from the dropdown list, navigate to the publication options pictured below and choose the relevant information that you want to include in your export. All other default options can be left as-is (for example, 'Include Products = Minimum).



Note: The only options available for publication parameters are 'All' or 'None.' You may need to experiment with the combination of objects selected in the Select Objects step and the 'All' settings chosen in the Select Format step to ensure that you do not get too much or too little information in your export. For instance, if you export from a publication object and select 'All' for 'Include Publication Groups' but 'None' for 'Include Publications,' the export will include all publication groups that exist in your STEP system as well as the single publication selected, even though 'None' was selected for publications.

- The following parameters are relevant for **all** types of publications (standard STEP'n'design, Flatplanner, and AutoPage). Information on these parameters and the resulting tags in the STEPXML file are detailed in the **Exporting and Importing Publications in STEPXML** topic in the **STEP'n'design** documentation.
    - Include Publications
    - Include Publication Groups
    - Include Publication Sections
    - Include Actual Page Data: relevant if you have saved mounted DTP documents into your publication
- The following options are valid for **Flatplanner** publications.
    - Include Planned Pages
    - Include Baskets
    - Include Pagination Rules

3. Choosethe following STEPXML outbound parameter if it is relevant to your publication:
    - **Include STEP Workflow Task Info:** If you are using a Flatplanner workflow, this parameter will return the ID of the user to whom the Flatplanner planned page is currently assigned. 'Include Planned Pages' must also be set to All to return this information. For more information on Flatplanner workflows, see the **Flatplanner Workflows** documentation.

4. The Map Data step is skipped as with any other STEPXML export, since data is not mapped in the STEPXML format.
5. The options in the Advanced step and the Select Delivery Method step are the same as those available for any other type of STEPXML export. See **Export Manager - Advanced** and **Export Manager - Select Delivery Method** in the **Export Manager** documentation for more information.

Note: Though the **Select version used to resolve tables** option references publication versions, this setting is only relevant if the 'Include Tables' parameter is set to 'Yes' in the Select Objects step. This setting has no impact on publication-only exports.

File Example

The following STEPXML sample shows an export from a Flatplanner publication that contains two versions, a basket, pagination rules, one section with one planned page, and metadata attributes on the publication, section, and planned page objects.

Note: The content inside the <PaginationRules> tag in the below file sample has been abbreviated for illustration purposes, and as such is not valid for importing pagination rules in an actual publication import.

```
<STEP-ProductInformation ExportContext="Context1" ContextID="Context1" WorkspaceID="Main"
UseContextLocale="false">
<PublicationGroups>
  <PublicationGroup UserTypeID="Publication group root" ParentID="Publication hierarchy
root" ID="108198" UnitID="inches">
    <Name>Flatplanner Publications</Name>
      <Publication UserTypeID="Default publication type" MasterDocumentID="109967"
PagesPerSpread="2" DefaultPageTemplateID="121163" DTPType="InDesign" ParentID="108198"
ID="128523">
        <Name>Acme Party Supplies</Name>
        <MetaData>
          <Value AttributeID="CatalogTheme">Acme Party Supplies</Value>
          <Value AttributeID="LastPageNumber" Derived="true">0</Value>
        </MetaData>
        <Version ContextID="Context2" WorkspaceID="Main" ID="204372">
          <Name>French FR</Name>
        </Version>
        <Version ContextID="Context1" WorkspaceID="Main" ID="128525">
          <Name>English US</Name>
        </Version>
        <Basket>
          <ProductBasketLink ProductID="121193"/>
          <ProductBasketLink ProductID="121180"/>
          <ProductBasketLink ProductID="121182"/>
          <ProductBasketLink ProductID="121183"/>
          <ProductBasketLink ProductID="121190"/>
          <ProductBasketLink ProductID="121218"/>
          <AssetBasketLink AssetID="121200"/>
          <ClassificationBasketLink ClassificationID="IllustrationRoot"/>
        </Basket>
        <PaginationRules><!--Abbreviated--
>PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ1bGVzIFZlcnNpb249IjMiPgogIDxQYWdpbm
F0aW9uUnVsZUdyb3VwPgogICAg=</PaginationRules>
        <PageTemplateLink PageTemplateID="2x2"/>
        <PageTemplateLink PageTemplateID="4x4"/>
        <PageTemplateLink PageTemplateID="3x3"/>
        <ProductTemplateLink ProductTemplateID="123670"/>
        <ProductTemplateLink ProductTemplateID="109964"/>
        <ProductTemplateLink ProductTemplateID="121385"/>
```

```
        <PublicationSection ID="128535" UserTypeID="Section">
          <Name>Party Favors</Name>
          <MetaData>
            <Value AttributeID="SectionTheme">Party Favors</Value>
            <Value AttributeID="FirstPageNumber" Derived="true">4</Value>
            <Value AttributeID="LastPageNumber" Derived="true">9</Value>
          </MetaData>
          <PaginationRules><!--Abbreviated--
>PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ1bGVzIFZlcnNpb249IjIiPgogIDxQYWdpbm
F0aW9uUnVsZUdyb3VwPgogICAg=</PaginationRules>
          <PlannedPage PageNumber="4" ID="128536" User="DTPUSER">
            <Name>Confetti</Name>
            <MetaData>
              <Value AttributeID="GetInheritedSectionValue" Derived="true">Party
Favors</Value>
              <Value AttributeID="GetInheritedPubGroupValue" Derived="true">Acme Party
Supplies - Since 1955</Value>
              <Value AttributeID="GetInheritedPublicationValue" Derived="true">Acme Party
Supplies</Value>
            </MetaData>
            <TemplateLayout TemplateID="2x2"/>
            <PageContents>
              <Frame ID="200" X="1.0" Y="0.75" Width="3.25" Height="4.63" ZOrder="0"
UnitID="inches">
                <ProductElement ProductID="109954">
                  <TemplateLayout TemplateID="121385"/>
                </ProductElement>
              </Frame>
              <Frame ID="201" X="4.52" Y="0.75" Width="3.25" Height="4.62" ZOrder="1"
UnitID="inches">
                <ProductElement ProductID="109955">
                  <TemplateLayout TemplateID="121385"/>
                </ProductElement>
              </Frame>
              <Frame ID="202" X="1.0" Y="5.62" Width="3.25" Height="4.63" ZOrder="2"
UnitID="inches">
                <ProductElement ProductID="109951">
                  <TemplateLayout TemplateID="109964"/>
                </ProductElement>
              </Frame>
              <Frame ID="203" X="4.52" Y="5.62" Width="3.25" Height="4.63" ZOrder="3"
UnitID="inches">
                <ProductElement ProductID="109953">
```

```
                    <TemplateLayout TemplateID="109964"/>
                  </ProductElement>
                </Frame>
                <NoteFrame ID="1490212610420" X="1.79" Y="1.97" Width="0.59" Height="0.59"
ZOrder="4" UnitID="inches" Status="true">
                  <NoteRecord Username="USER4" Timestamp="Wed Mar 22 15:56:50 EDT 2017">This
is approved</NoteRecord>
                </NoteFrame>
              </PageContents>
            </PlannedPage>
          </PublicationSection>
        </Publication>
      </PublicationGroup>
    </PublicationGroups>
</STEP-ProductInformation>
```

Flatplanner Information Included in the Export

The following sections explain the Flatplanner information included in the STEPXML file.

Include Publications

Full details on the information included in the <Publication> tag is provided in the **Exporting and Importing Publications in STEPXML** topic. Highlighted below are the two additional XML attributes included for Flatplanner publications.

```
<Publication UserTypeID="Default publication type" MasterDocumentID="109967" PagesPerSpread="2"
DefaultPageTemplateID="121163" DTPType="InDesign" ParentID="108198" ID="128523">
```

Tag	Description
<Publication>	Returns the following additional information for Flatplanner publications: • PagesPerSpread: The default number of pages used for spreads in the publication (valid values are 1 and 2) • DefaultPageTemplateID: The default page template used for planned pages in the publication

Include Planned Pages

```
<PlannedPage PageNumber="5" ID="128537">
  <Name>Confetti</Name>
  <MetaData>
    <Value AttributeID="GetInheritedSectionValue" Derived="true">Party Favors</Value>
    <Value AttributeID="GetInheritedPubGroupValue" Derived="true">Acme Party Supplies - Since 1955</Value>
    <Value AttributeID="GetInheritedPublicationValue" Derived="true">Acme Party Supplies</Value>
  </MetaData>
  <TemplateLayout TemplateID="Doc-dev page temp"/>
  <PageContents>
    <Frame ID="200" X="0.75" Y="0.75" Width="3.25" Height="4.63" ZOrder="0" UnitID="inches">
      <ProductElement ProductID="110049">
        <TemplateLayout TemplateID="109964"/>
      </ProductElement>
    </Frame>
    <Frame ID="201" X="4.25" Y="0.75" Width="3.25" Height="4.62" ZOrder="1" UnitID="inches">
      <ProductElement ProductID="110047">
        <TemplateLayout TemplateID="109964"/>
      </ProductElement>
    </Frame>
    <Frame ID="202" X="0.75" Y="5.62" Width="3.25" Height="4.63" ZOrder="2" UnitID="inches">
      <ClassificationElement ClassificationID="IllustrationRoot">
        <TemplateLayout TemplateID="109964"/>
      </ClassificationElement>
    </Frame>
    <Frame ID="201" X="4.38" Y="0.75" Width="3.28" Height="4.63" ZOrder="3" UnitID="inches">
      <AssetElement AssetID="121205"/>
    <NoteFrame ID="1490212610420" X="1.79" Y="1.97" Width="0.59" Height="0.59" ZOrder="4" UnitID="inches"
     Status="true">
      <NoteRecord Username="USER4" Timestamp="Wed Mar 22 15:56:50 EDT 2017">This is approved</NoteRecord>
    </NoteFrame>
  </PageContents>
  </PlannedPage>
```

Tag	Description
<PlannedPage>	Parent tag for all planned page information included in the export. Returns the following information: • PageNumber: Page number of the planned page • ID: STEP ID of the planned page
<Name>	Returns the STEP name of the planned page
<MetaData>	Parent tag for metadata <Value> tags
<Value>	Returns the ID (AttributeID) and value of the description (metadata) attributes linked to the planned page. If an attribute is calculated, Derived="true".
<TemplateLayout>	Returns the STEP ID (TemplateID) of the page template used on the planned page

Tag	Description
<PageContents>	Parent Tag for <Frame> tags
<Frame>	Returns the following information about the Flatplanner frame: • ID: STEP ID of the frame • X: The X coordinate of the frame on the planned page • Y: The Y coordinate of the frame on the planned page • Width: The width of the frame • Height: The height of the frame • ZOrder: The layering order of the frames • UnitID: STEP ID of the unit used in the frame measurements
<ProductElement>	Returns the ID (ProductID) of the product object linked to the frame
<ClassificationElement>	Returns the ID (ClassificationID) of the classification object linked to the frame
<AssetElement>	Returns the ID (AssetID) of the asset linked to the Flatplanner frame
<TemplateLayout>	When nested inside the <ProductElement> tag, returns the ID of the product template attached to the frame

<NoteFrame>	Returns the following information about the Flatplanner note:
	• ID: STEP ID of the note
	• X: The X coordinate of the note on the planned page
	• Y: The Y coordinate of the note on the planned page
	• Width: The width of the note frame
	• Height: The height of the note frame
	• ZOrder: The layering order of the note frame.
	• UnitID: STEP ID of the unit used in the note frame measurements
	• Status: Whether or not the note has been marked 'done.' Returns 'true' if the note has been marked done and 'false' if it has not.
	• <NoteRecord>: Nested tag that returns the content of the note as well as the following information:
	    • Username: STEP ID of the user that created the note
	    • Timestamp: Date and time that the note was created

Include Baskets

```
<Basket>
  <ProductBasketLink ProductID="121171"/>
  <ProductBasketLink ProductID="121178"/>
  <ProductBasketLink ProductID="121177"/>
  <ProductBasketLink ProductID="121184"/>
  <ProductBasketLink ProductID="121192"/>
  <ProductBasketLink ProductID="121218"/>
  <ProductBasketLink ProductID="121175"/>
  <ProductBasketLink ProductID="121176"/>
  <AssetBasketLink AssetID="121200"/>
  <AssetBasketLink AssetID="121205"/>
  <ProductBasketLink ProductID="121179"/>
  <ClassificationBasketLink ClassificationID="IllustrationRoot"/>
</Basket>
```

Tag	Description
<BasketLink>	Parent tag for objects contained in the Flatplanner basket
<ProductBasketLink>	Returns the STEP ID of the product object linked to the basket
<AssetBasketLink>	Returns the STEP ID of the asset object linked to the basket
<ClassificationBasketLink>	Returns the STEP ID name of the classification object linked to the basket

Include Pagination Rules


```
<PaginationRules>
PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ1bGVzIFZlcnNpb249IjIiPgogID
xQYWdpbmF0aW9uUnVsZUdyb3VwPgogICAgPFBhZ2luYXRpb25SdWxlIFR5cGU9IlByb2R1Y3RUZW1wbGF0
ZUFjdGlvbiIgT3ZlcnJpZGRlbj0iMTA4MjAyLTEiIElkPSIxMDgyMDItMSI+CiAgICAgIDxDb25kaXRpb2
5zPgogICAgICAgIDxDb25kaXRpb24gSUQ9IkFsd2F5c0NvbmRpdGlvbiI+CiAgICAgICAgICA8UGFyYW1l
dGVycy8+CiAgICAgICAgPC9Db25kaXRpb24+CiAgICAgIDwvQ29uZGl0aW9ucz4KICAgICAgPEFjdGlvbn
M+CiAgICAgICAgPEFjdGlvbiBJRD0iUHJvZHVjdFRlbXBsYXRlQWN0aW9uIiBUeXBlPSJQcm9kdWN0VGVt
cGxhdGVBY3Rpb24iPgogICAgICAgICAgPFBhcmFtZXRlcnM+CiAgICAgICAgICAgIDxQYXJhbWV0ZXIgSU
Q9InRlbXBsYXRlSUQiPmNvbS5zdGliy5jb3JlLnBlcnNpc3RlbmNlLk5vZGVQTy0yMDg2NDAzPC9QYXJh
bWV0ZXI+CiAgICAgICAgICAgIDxQYXJhbWV0ZXIgSUQ9InRlbXBsYXRlVGl0bGUiPldlZGRpbmcgUHJvZC
BUZW1wPC9QYXJhbWV0ZXI+CiAgICAgICAgICA8L1BhcmFtZXRlcnM+CiAgICAgICAgPC9BY3Rpb24+CiAg
ICAgIDwvQWN0aW9ucz4KICAgIDwvUGFnaW5hdGlvblJ1bGU+CiAgPC9QYWdpbmF0aW9uUnVsZUdyb3VwPg
o8L1J1bGVzPg==</PaginationRules>
```

Pagination rules are included in encrypted strings in STEPXML files. As such, no additional information is available. However, pagination rule strings are consistent, and as such can be copied and pasted between files for reimport.

Include STEP Workflow Task Info

```
<PlannedPage PageNumber="2" ID="108315" User="DTPUSER">
```

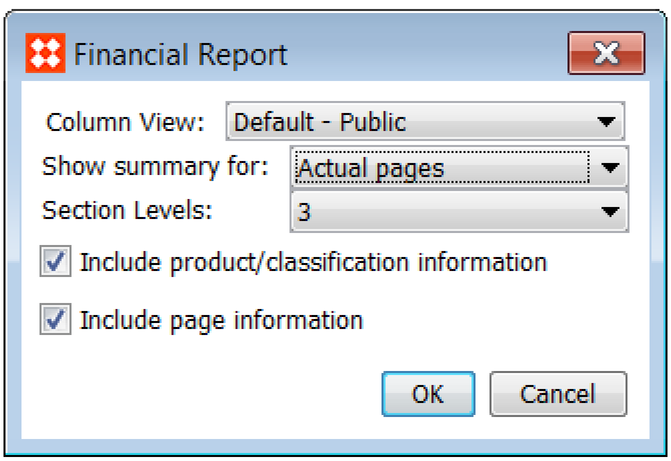
If 'Include STEP Workflow Task Info' is chosen as an outbound parameter in the Select Format step of the Export Manager, the STEP ID of the user to whom the planned page is currently assigned in the Flatplanner workflow will be returned within the <PlannedPage> tag.

Creating Financial Reports

To analyze the data that is available in the Financial Summary view, you can create an Excel-based Financial Report. You can create the report from two places in the publication hierarchy—the publication level and the section level.

To Create a Financial Report

1. In the Tree, expand the publication hierarchy. Right-click the relevant publication or section, and then choose **Financial Report.** The Financial Reports dialog appears.



2. From the **Column View** list, select the preferred column view. The available views correspond to the views that are available in **Financial Summary** view.
3. From the **Show summary for** list, select either Basket, Planned pages or Actual pages.
   - **Basket** provides the data from Basket view
   - **Actual pages** provides the data for DTP pages that have been saved back to STEP.
   - **Planned pages** provides the data for the planned pages. If available, space usage data is extracted from the actual pages.

4. From the **Section Levels** list, select the number of levels you want to include in the report. The level is relative to the level you have clicked in the Tree.

   Example: If you have selected a publication node in the tree, the publication is level 1, the version is level 2, and the section is level 3.

5. To include product names, check **Include product information**.
6. To view the financial data per page, check **Include page information**.
7. Click **OK**. Excel opens and displays the report.

Space Usage in Financial Reports

Space usage provides information about how much space a product presentation takes up on a page. This information is useful, for example, to analyze sales per square inch or millimeter for a product. This in turn helps you decide how much space to give a product in the next catalog or where to place the product.

To include space usage information in a financial report, do the following.

- Verify that space usage handles the white space of a product presentation the way you want it to.
- Add a Space Usage column to Financial Summary view.

Space Usage Setup

The standard space usage setup calculates the space usage for a product presentation based on the raw data on a page. It does not include the white space of the product presentation in the calculation.

For example, if you increase the font size of a product title, the space usage increases. However, if you increase the size of a frame without increasing the size of the content of the space, the space usage does not increase.

To Include White Space in Space Usage Calculations

If you want to include the white space of a product presentation in the calculation as well, you have to set this up in System Setup.

1. In **Systems Setup**, click **Users and Group**.
2. On the **System Settings** tab, locate the **Flatplanner Default Settings** area.
3. Click the **Value** field of **Enable calculation of border rectangle space usage for actual page**.

Merchandiser Default Settings

Name	Value
Enable keep layouts for publications	Y
Enable calculation of border rectangle space usage for actual pages	N

The space usage now includes the white space of a product presentation from the upper left corner of the product presentation to the lower right corner.

Note: You can only change this setting if you are a member of the Super User group.

Add Space Usage to Financial Summary View

If you want a financial report to include space usage information, you have to add the column Space Usage to the Financial Summary view.

1. In the Tree, expand the **Publication** hierarchy, select a section or spread.
2. On the plan tab, click the **Financial Summary** tab.
3. In the upper right corner, click **View Options**, and then choose **Edit**. The **Edit View** dialog displays a list of the current view content elements.
4. Click an element, right-click, point to **Add**, and then choose Space Usage. If Space Usage is not listed, click **Other …**.
5. Click **OK**.

Flatplanner Workflows

A STEP Flatplanner workflow links together all of the tasks involved in the process of planning and approving the pages that comprise Flatplanner publications.

Unlike other STEP workflows, the Flatplanner workflow is integrated with **InDesign** through the **STEP'n'design** plugin. This integration allows DTP (desktop publishing) users (also referred to as designers) to accept Flatplanner workflow tasks from within InDesign without ever having to log into the workbench.

STEP Flatplanner workflows typically involve tasks such as planning pages, approving planned pages, routing planned pages to designers who carry out layout tasks in InDesign, and approving finalized pages. The object type that moves through a Flatplanner workflow is the **Planned Page**.

Configuring a Flatplanner Workflow

Instructions on how to configure specific elements of a Flatplanner workflow that are unique to the Flatplanner workflow are covered in the **Configuring Flatplanner Workflows** documentation. These unique elements include the configuration of the **STEP Tasks** dialogs in InDesign as well as the options available in the **Publication Planner**.

Sample Flatplanner Workflow

A sample Flatplanner workflow, which details the tasks involved in accepting tasks, planning a page, and approving a page, is detailed in the **Flatplanner Workflow Example** documentation.

As with any STEP workflow, Flatplanner workflows are customized according to specific customer requirements. This is merely a 'how to' example that serves as a walkthrough of a simple Flatplanner workflow.

Publication and Section Object Workflows

Workflows for publication and publication section objects may also be implemented in addition to a Flatplanner workflow.

Publication and section workflows enable the assignment of tasks such as:

- Importing prices
- Publication planning, where information such as dates and styles are defined
- Linking of products to sections
- Population of metadata attributes on publication and section objects

Unlike Flatplanner page spread workflows (which require use of the Publication Planner), publication and section workflows function like standard STEP workflows used for classifications, products, and assets. Also, a Flatplanner license is not required to use a publication or section workflow. However, even with a Flatplanner license, DTP users cannot pick up tasks related to publication and section objects in InDesign.

Note: Publication objects and section objects cannot share the same workflow. Each object type must have its own standalone workflow.

Publication and section workflows are created by the same methods as any other workflow in STEP. For instructions, see the **Getting Started with STEP Workflows** section of the **STEP Workflows** documentation.

Configuring Flatplanner Workflows

A Flatplanner workflow is built and configured like any other workflow in STEP, though it has a few features that are unique to it, such as:

- The ability to send planned pages through a workflow
- The ability to stop and start workflows from the Publication Planner
- The ability to color-code workflow states in the Publication Planner
- The ability to set milestone / 'traffic light' colors in the Publication Planner, to give users a visual indicator of how far along a Planned Page is in a particular state (see **Publication Milestones** in the **Flatplanner** documentation for more information)
- The ability for desktop publishing (DTP) users to pick up workflow tasks in InDesign when changes need to be made on actual pages
- Automated generation of InDesign pages using a background process, enabling DTP users to pick up mounted InDesign pages in InDesign as part of the Flatplanner workflow process without having to manually mount the pages themselves

The available options for a Flatplanner workflow will vary depending on how the workflow has been configured and will vary from user to user.

General workflow topics such as configuring workflow states, transitions, views, etc., are not covered in this topic, as they are not unique to the Flatplanner workflow.

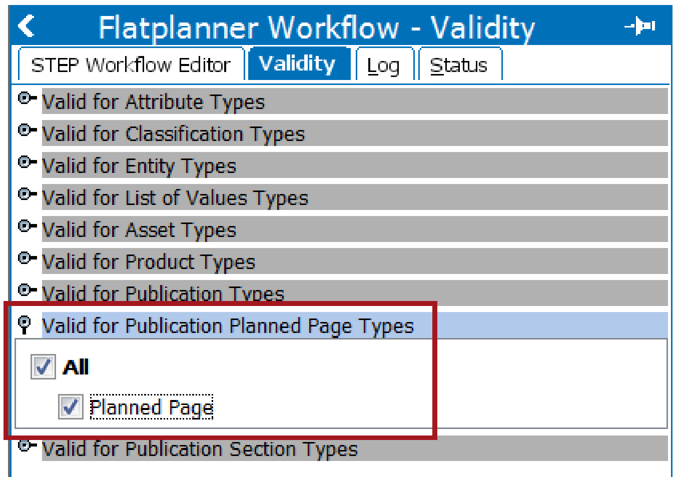
Note: If you are using a Flatplanner workflow for the first time on a STEP system that is version 8.0 or higher, the following property must be added to the sharedconfig.properties file on your application server: `Workflow.FlatPlanner.SelfContained=true`. For users who have upgraded to STEP 8.0 but need to continue using an existing (pre-STEP 8.0) Flatplanner workflow, this property should either be omitted from the sharedconfig.properties file altogether or set to **false**. Contact Stibo Systems if you need assistance with this configuration.

Creating the Workflow

A Flatplanner workflow is created by the same method as any other workflow in STEP. For instructions, see the **Getting Started with STEP Workflows** section of the **STEP Workflows** documentation.

Flatplanner workflows must be made valid for the **Planned Page** object type.

Note: Only one object type is available in STEP for Planned Pages. Additional Planned Page object types cannot be created.



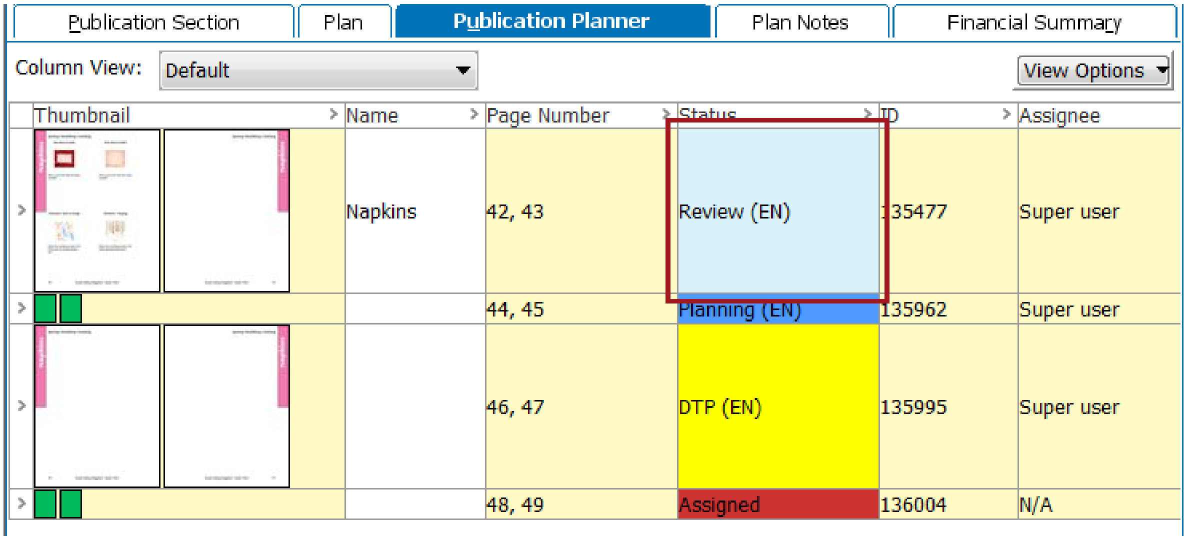
In addition, at least one state must be configured for use by DTP users in InDesign. See **Configuring DTP Task Views for InDesign** in the **Flatplanner** documentation for more information.

Configuring Status / Workflow State Colors

In Flatplanner workflows, workflow states can be configured with color coding that displays in the Publication Planner, on planned pages, and on actual pages. This color coding gives workbench users a quick way to obtain an overview of which states each planned page is currently in.

The following screenshot shows how these state colors display in the **Publication Planner**.

Note: If the **Status** column is not visible in your **Publication Planner** view, it must be added. See the **Configuring the Publication Planner Column View** section of the **Flatplanner** documentation for more information.



Each status may be assigned a custom color. These status colors are configured by adding an RGB value to an On Entry business action for each state that should receive a color code. This is achieved by setting the value of a workflow variable called STATE_COLOR in the following business rule:

```
node.getWorkflowInstance(workflow).setSimpleVariable("STATE_COLOR",
"217,241,253");
```

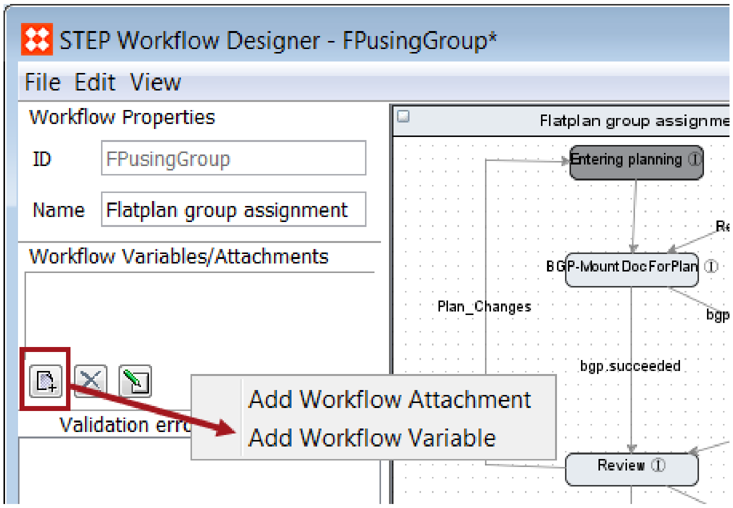
In this example, 217,241,253 is the RGB value of the light blue **Review** state shown in the previous screenshot.

Note: The **Assigned** status cannot be assigned a color by this method, since it is not a workflow state. If you require a different color for the Assigned status, contact Stibo Systems.

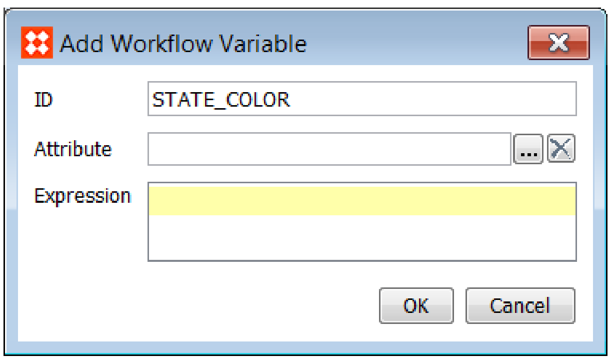
Configuring State Color Business Actions

To configure the business rules that set status colors, follow these steps:

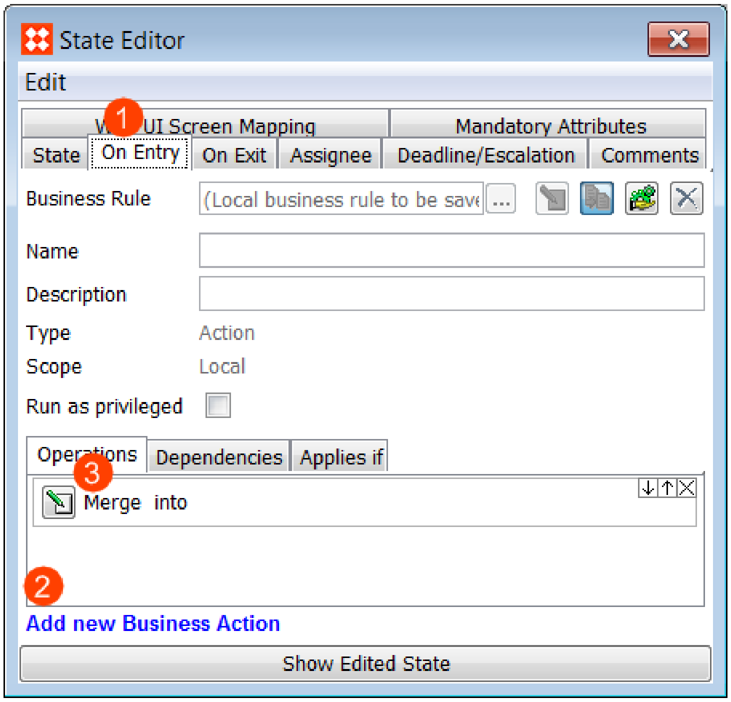
1. Locate the Flatplanner workflow in **System Setup** that you would like to edit, then right click and select **Edit STEP Workflow**. The **STEP Workflow Designer** displays.
2. In the **Workflow Variables/Attachments** area, click the **Add** icon and select **Add Workflow Variable**.



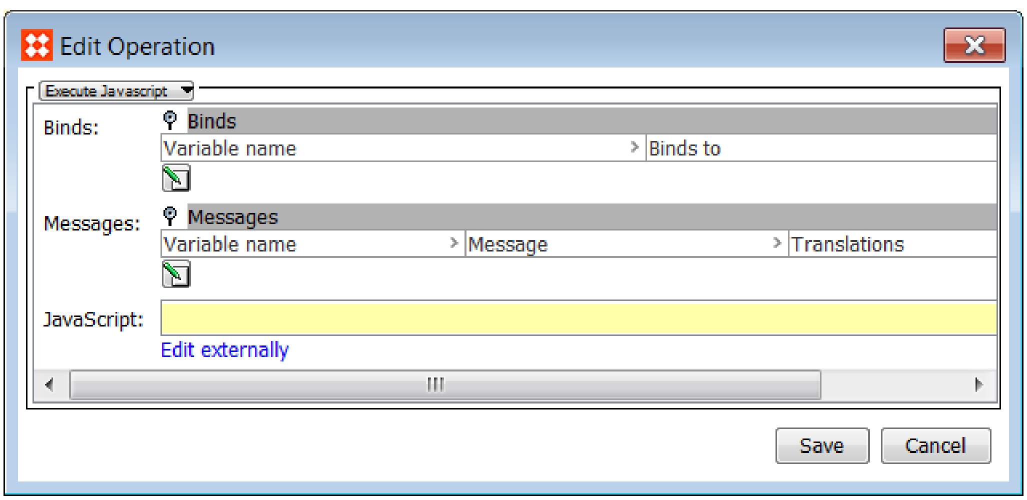
3. In the **Add Workflow Variable** dialog that displays, enter the ID **STATE_COLOR**, then click **OK**. The variable is created.



4. Next, in the **STEP Workflow Designer**, double click on the workflow state for which you would like to specify a state color. The **State Editor** dialog displays.
5. In the **State Editor**, navigate to the **On Entry** tab and click **Add new Business Action**, then click on the **Edit Operation** icon on the **Operations** tab.

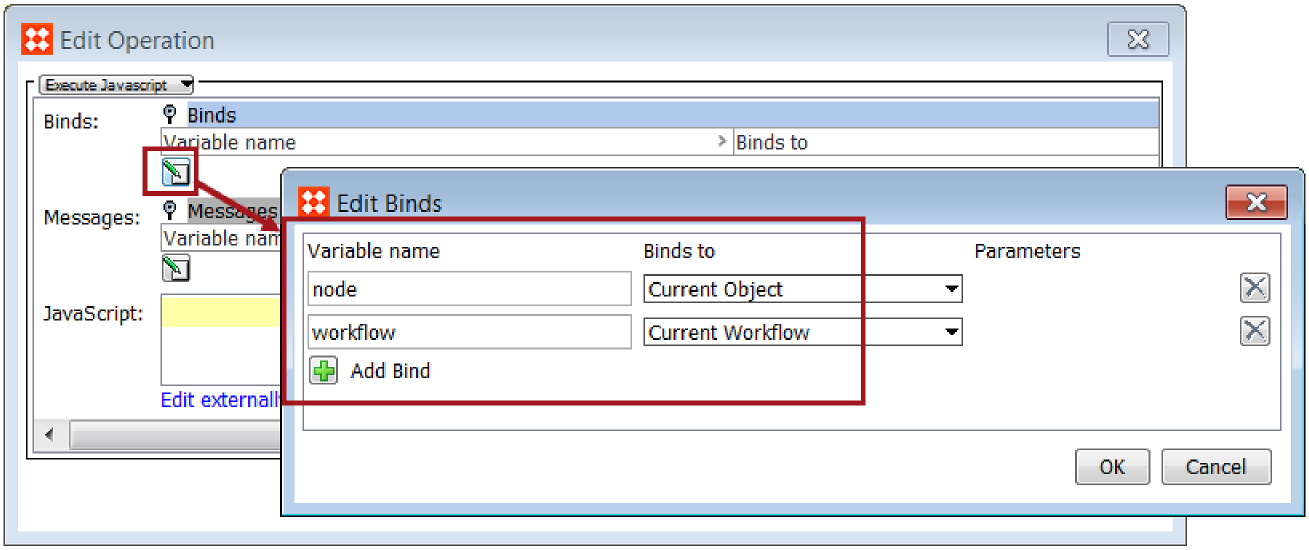


6. In the **Edit Operation** dialog that displays, click the dropdown list in the upper left-hand corner and select **Execute Javascript**. The Execute Javascript options now display in the Edit Operation dialog.



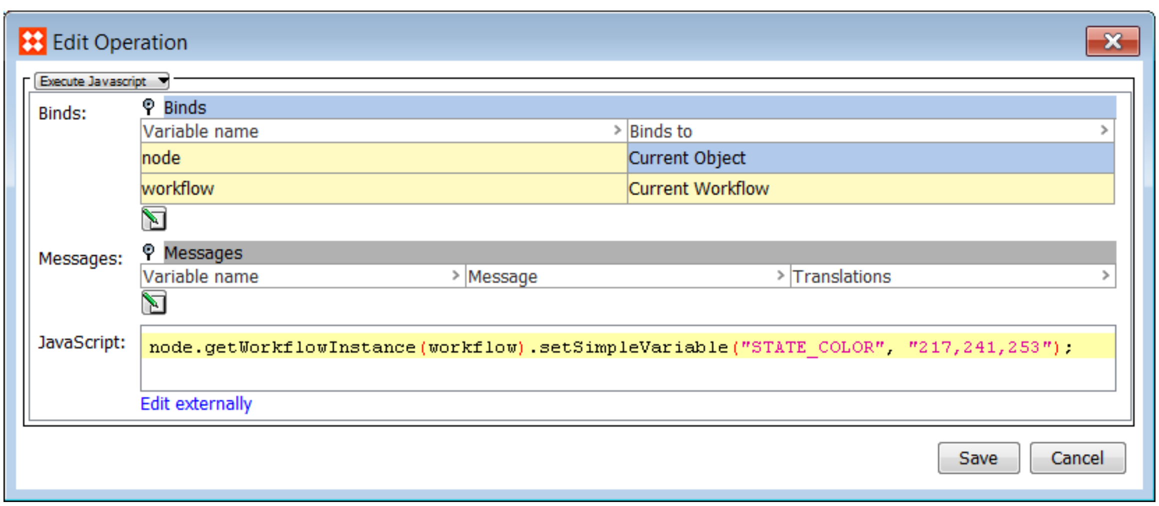
7. Click the 'edit' icon under the **Binds** flipper. The **Edit Binds** dialog displays.
8. Click the green plus sign **Add Bind** icon. Type **node** in the **Variable name** field, then select **Current Object** from the **Binds to** dropdown list.
9. Click the green plus sign **Add Bind** icon again. Type **workflow** in the **Variable name** field, then select Workflow > **Current Workflow** from the **Binds to** dropdown list.

10. Your **Edit Binds** dialog should now look like the following screenshot. When finished, click **OK** to close the dialog.



11. In the **JavaScript** field, copy and paste the following code:

```
node.getWorkflowInstance(workflow).setSimpleVariable("STATE_COLOR",
"217,241,253");
```

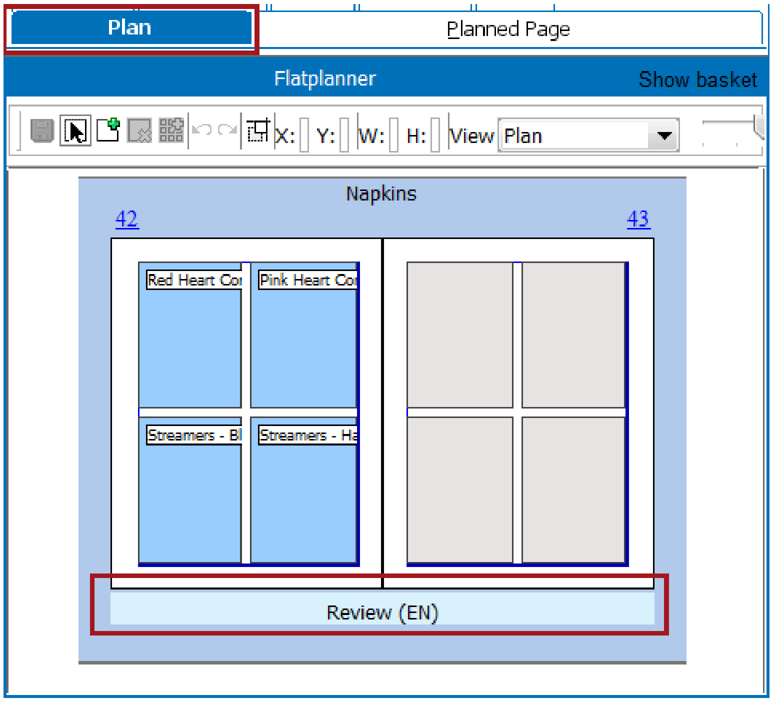


12. To customize the RGB value, replace the three numeric values with the RGB values of the preferred color.
13. Click **Save** to close the Edit Operation dialog. The business action is configured.

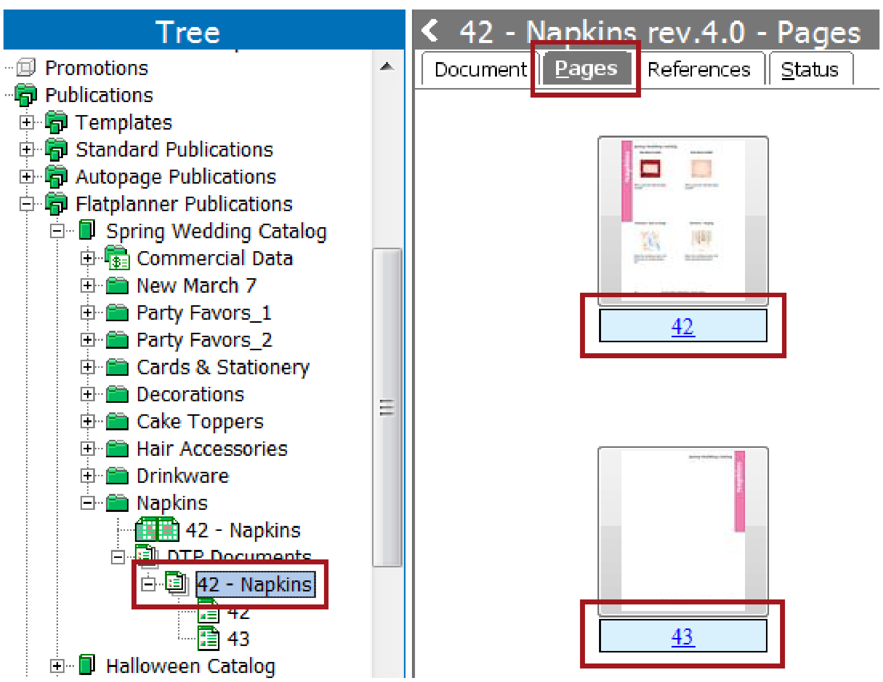
Viewing State Colors in Locations Other Than the Publication Planner

State colors for Flatplanner workflows also appear in the workbench in the following locations:

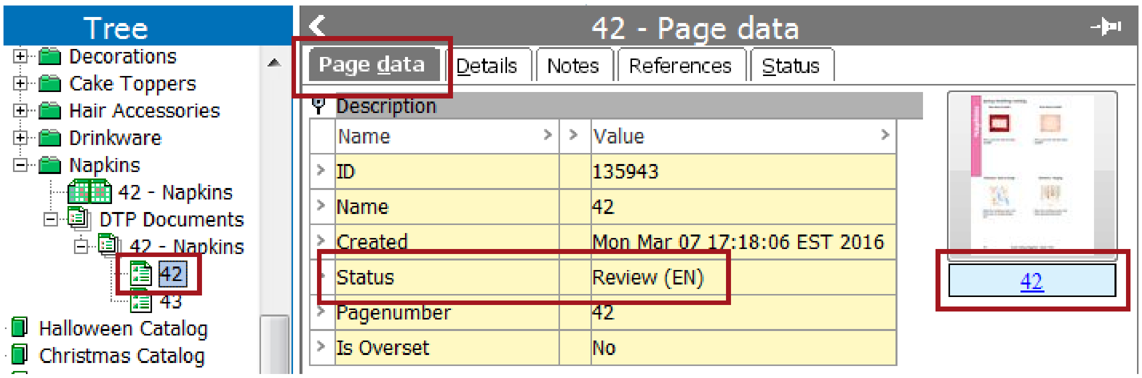
- Below Planned Pages on the **Plan** tab:



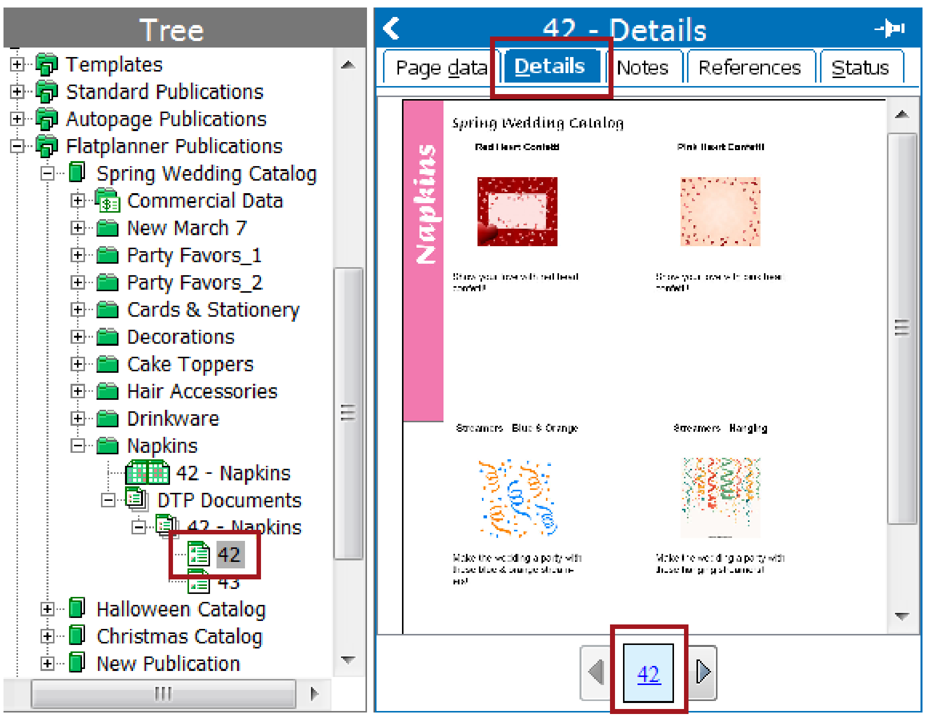
- Below **actual pages** on the **Pages** tab:



- Below **actual pages** on the **Page data** tab:

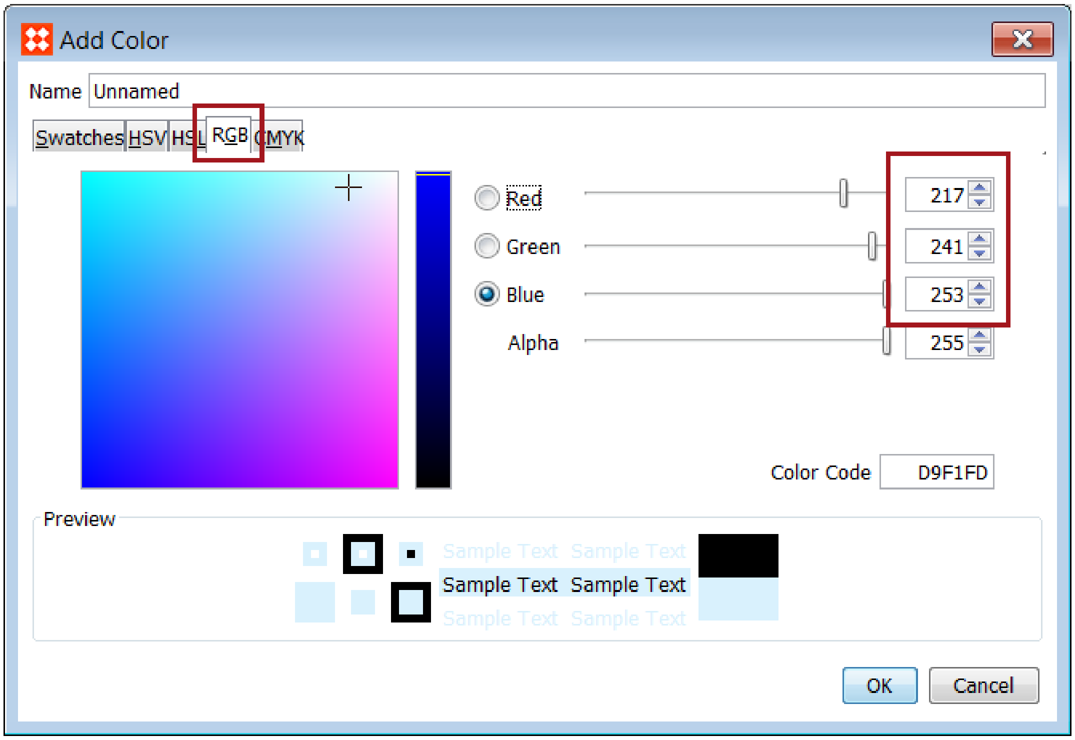


- Below actual pages on the **Details** tab:



For More Information on RGB Values

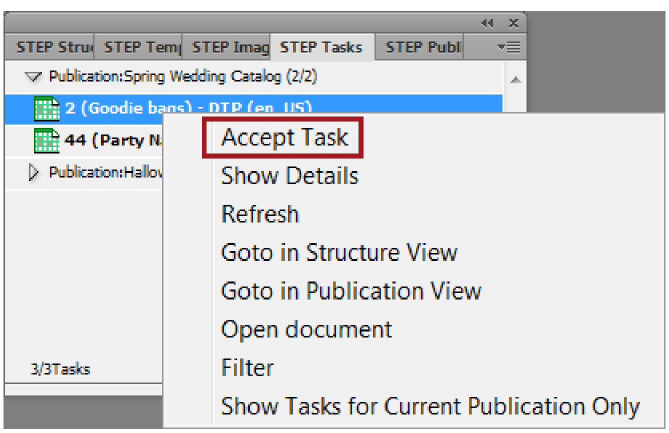
Though RGB values must be entered manually in the JavaScript string to configure state / status colors, an **Add Color** dialog exists in STEP that could be used as a guide when deciding on a color. This guide displays the numeric values for RGB colors, which could be copied and pasted into the relevant area of the JavaScript string. For information on how to access the **Add Color** dialog, see the **Defining Table Colors in STEP** section of the **STEP Tables** documentation.



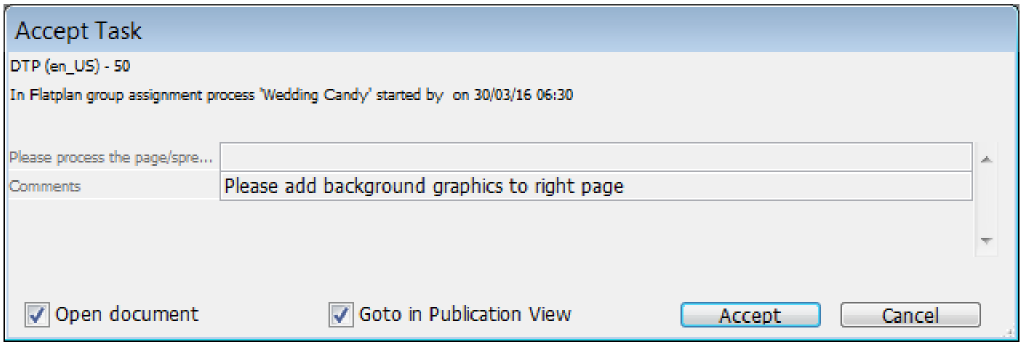
Configuring DTP Task Views for InDesign

DTP users accept STEP Workflow tasks in InDesign from the **STEP Tasks** palette / panel. This panel is also where DTP users return these tasks (in the form of actual pages) back to STEP after completing work on the page.

Note: This topic describes the functionality of the STEP Tasks palette in the context of how to use it with a Flatplanner workflow. For a detailed explanation of all menu items on the palette, see the **STEP Tasks** topic in the **STEP'n'design** documentation.



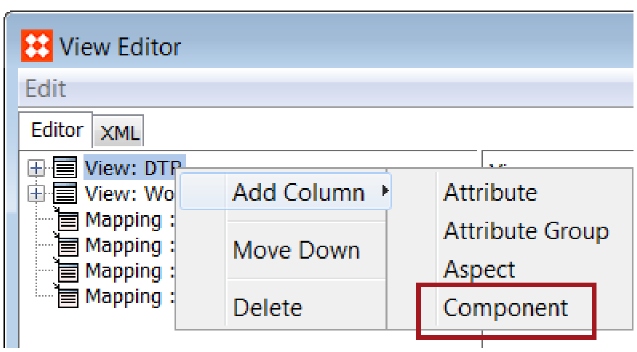
When DTP users click Accept Task from the STEP Tasks panel, an **Accept Task** dialog displays.



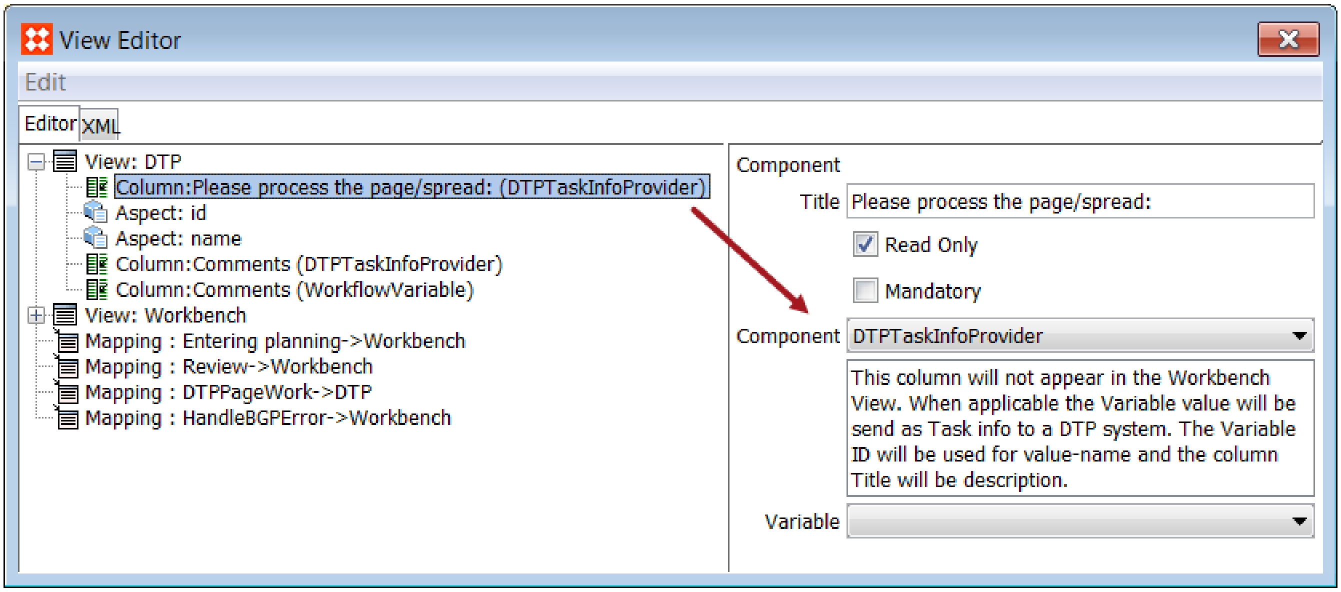
Enabling the Accept Task Action in the STEP Tasks Panel

To enable the **Accept Task** action in the **STEP Tasks** panel in InDesign, at least one **Component** column using the **DTPTaskInfoProvider** component must be added to the **View** for the DTP workflow state. This is configured as follows:

1. In **System Setup**, navigate to the desired Flatplanner workflow, then right click and select **Edit STEP Workflow**. The **STEP Workflow Designer** displays.
2. In the STEP Workflow Designer, navigate to Edit **> Edit Workbench Views and Mappings**. The **View Editor** displays.
3. If no views or mappings are already present, create them according to the steps outlined in the **Views and Mappings for Workflows** section of the **STEP Workflows** documentation.
4. Right click the **View** for the DTP workflow state, then select Add Column > **Component**.



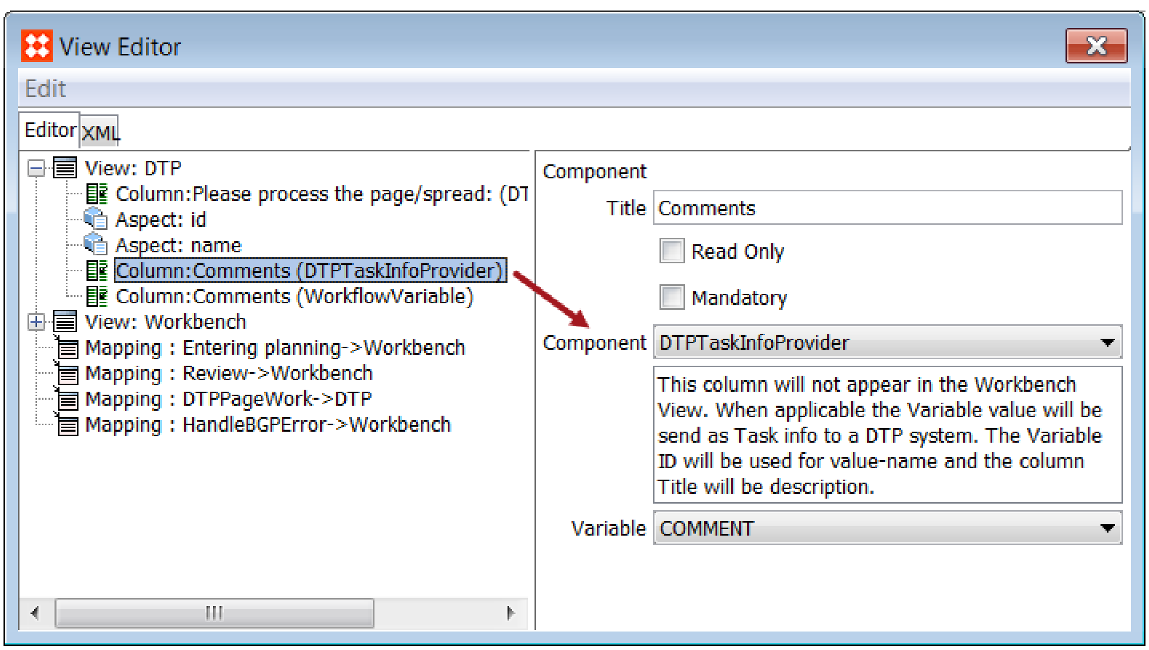
5. Select **DTPTaskInfoProvider** from the Component dropdown list, then insert the desired text (which you would like the DTP operator to see) in the **Title** field. The following screenshot shows the standard configuration for the required DTPTaskInfoProvider component column.



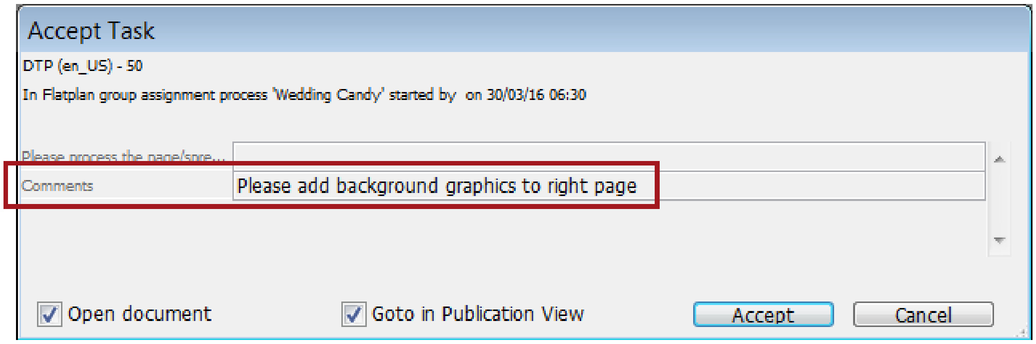
Adding Additional Fields to the Accept Task Dialog

To add additional fields to the **Accept Task** dialog in InDesign, additional columns using the **DTPTaskInfoProvider** component may be added to the View in conjunction with workflow **Variables**.

The following example shows the column configuration for a Comments field. It uses the **DTPTaskInfoProvider** component in conjunction with a workflow variable called COMMENT:

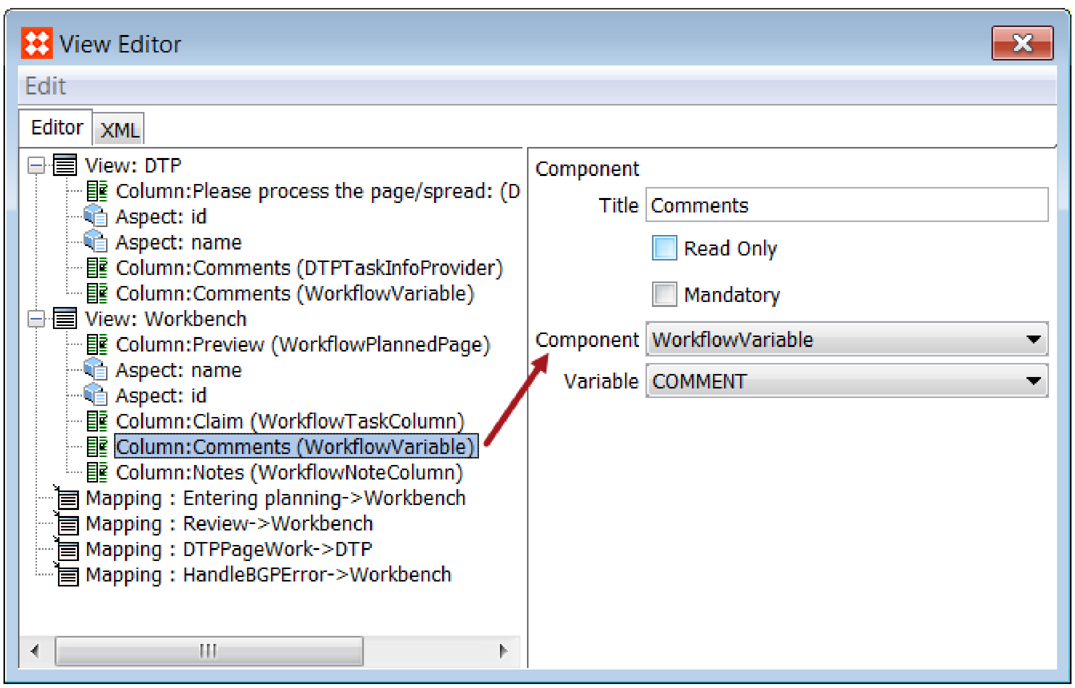


Here is how this Comments field appears in the Accept Task dialog in InDesign:

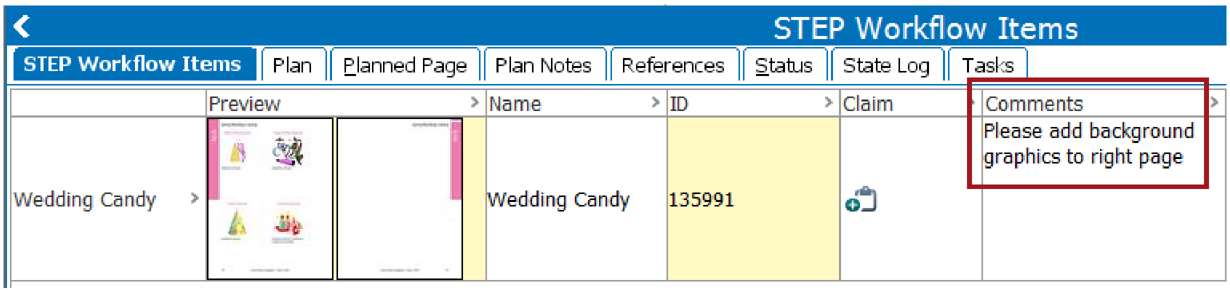


This same Comments field can also be viewed in the workbench and populated with content before DTP users pick up the task in InDesign. This is accomplished by adding a **Component** column to the **View** of another workflow state that is viewable in the workbench. This should be a state that the Planned Page passes through *before* it is routed to InDesign.

In this example, the component is **WorkflowVariable** and the variable is COMMENT (the same variable used to generate the Comments field in the **Accept Task** dialog). The following screenshot shows this configuration for a sample View called 'Workbench':



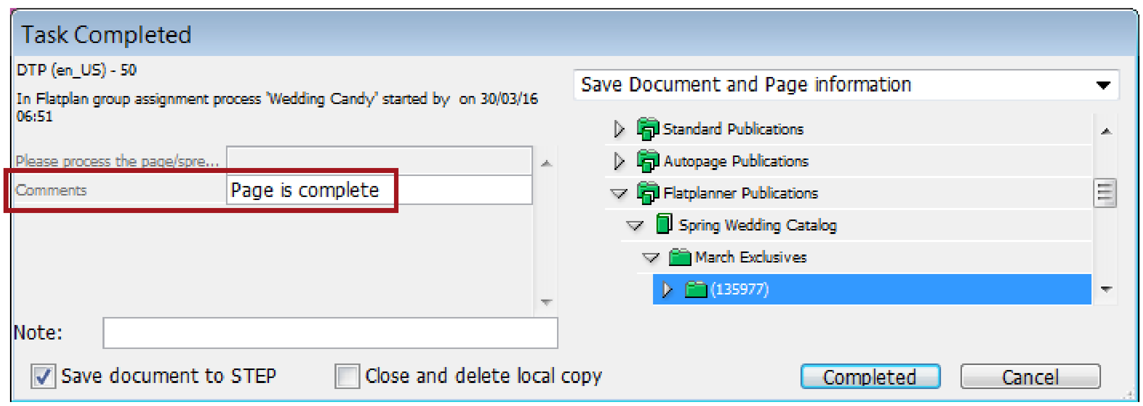
Here is how this column looks in the workbench:

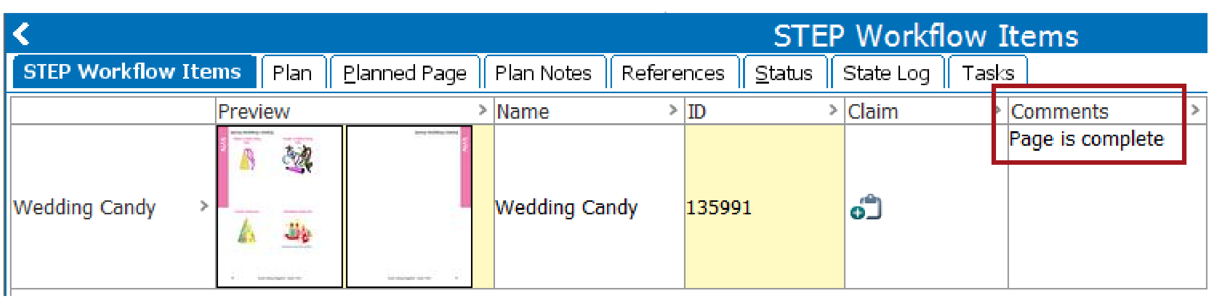


Fields in the Task Completed Dialog

Any columns added to the **Accept Task** dialog in InDesign using the DTPTaskInfoProvider component also appear in the **Task Completed** dialog (also accessed from the **STEP Tasks** panel in InDesign). The Task Completed dialog displays when DTP users have completed working with the page in InDesign and return it to STEP.

The following screenshot shows how the Comments 'column' looks in the **Task Completed** dialog. DTP users may overwrite the incoming comments, which will display in the workbench when the page is returned to STEP:

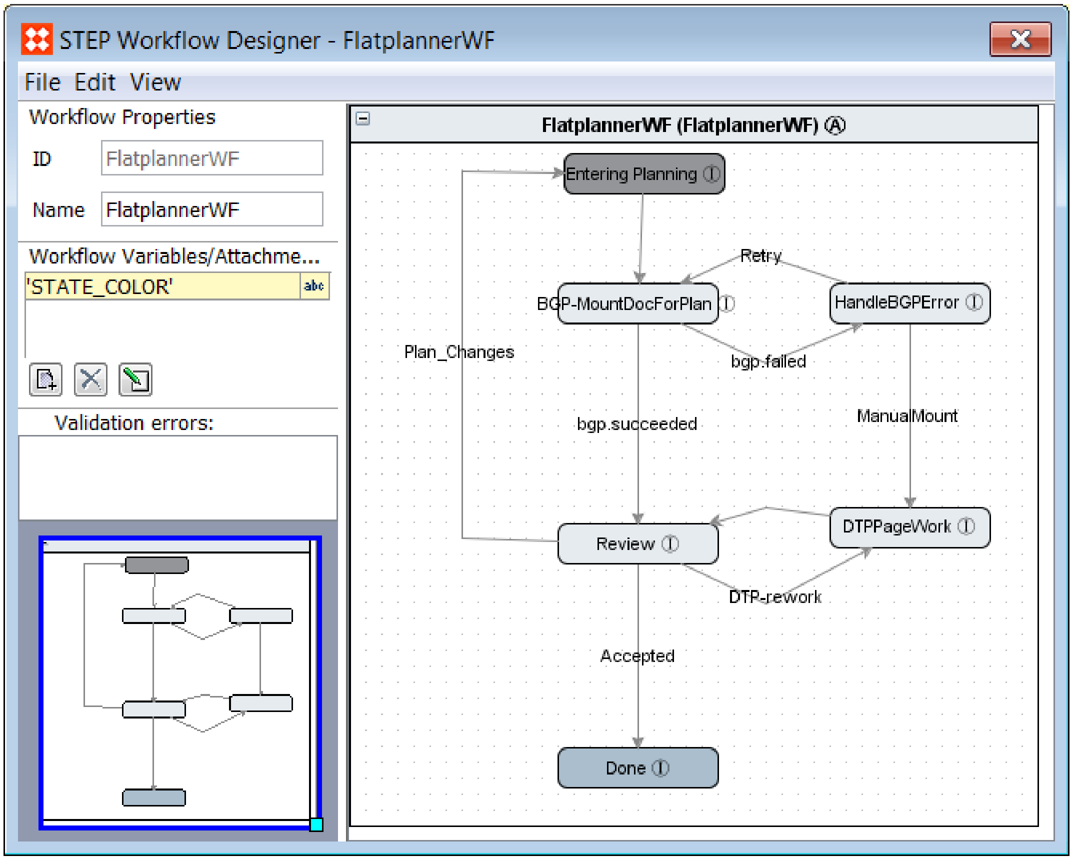




Flatplanner Workflow Example

This topic serves as a 'how-to' primer for working with a **sample** Flatplanner workflow and illustrates some common tasks that are performed as a Planned Page moves through the various workflow states. The example is simple but is examined on a state-by-state basis to provide you with a working knowledge of how a Flatplanner workflow actually functions, not just how to configure one.

The following screenshot shows a very simple Flatplanner workflow configuration in the STEP Workflow Designer. This is the example used in this tutorial.



This topic does not explain how to create or configure a Flatplanner workflow and assumes the following:

- The Flatplanner workflow is already created in STEP

  (If not, refer to the **Configuring Flatplanner Workflows** section of the **Flatplanner** documentation for more information)

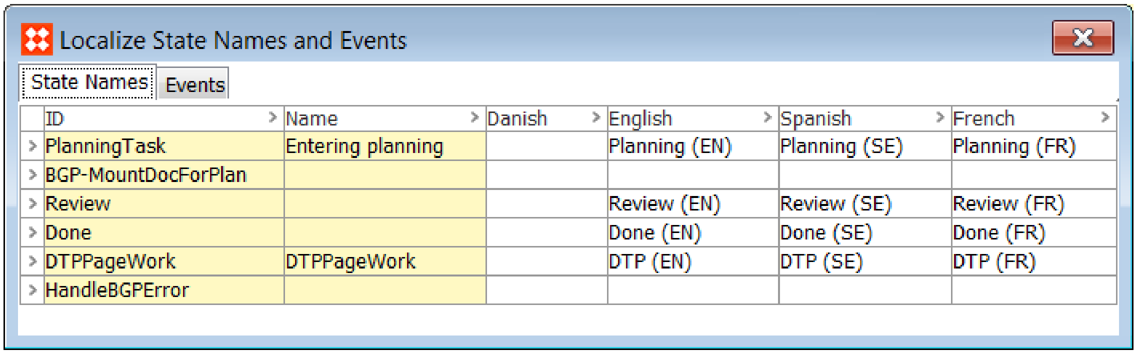
- The Planned Page has already been initiated into the workflow

  (If not, refer to the **Starting and Stopping Flatplanner Workflows** section of the **Flatplanner** documentation for more information.)

Note: As with any STEP Workflow, individual user requirements will determine the exact configurations. This sample merely illustrates some standard uses of Flatplanner workflows in general.

Planning the Page

The first state of our example workflow is named **Entering Planning**. The name that displays on the **STEP Workflow** tab under **Tasks** is determined by locale. In this instance, the Entering Planning state is named **Planning (EN)** since we are working with an English version of STEP.



Localize State Names and Events

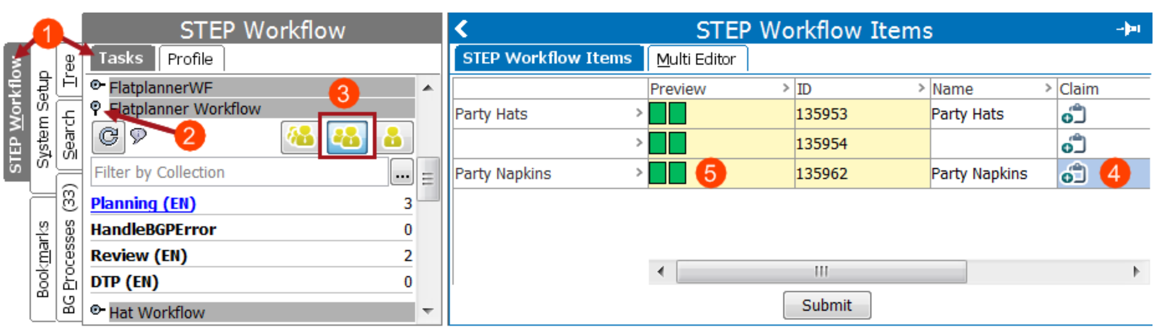
State Names | Events

ID	Name	Danish	English	Spanish	French
PlanningTask	Entering planning		Planning (EN)	Planning (SE)	Planning (FR)
BGP-MountDocForPlan					
Review			Review (EN)	Review (SE)	Review (FR)
Done			Done (EN)	Done (SE)	Done (FR)
DTPPageWork	DTPPageWork		DTP (EN)	DTP (SE)	DTP (FR)
HandleBGPError					

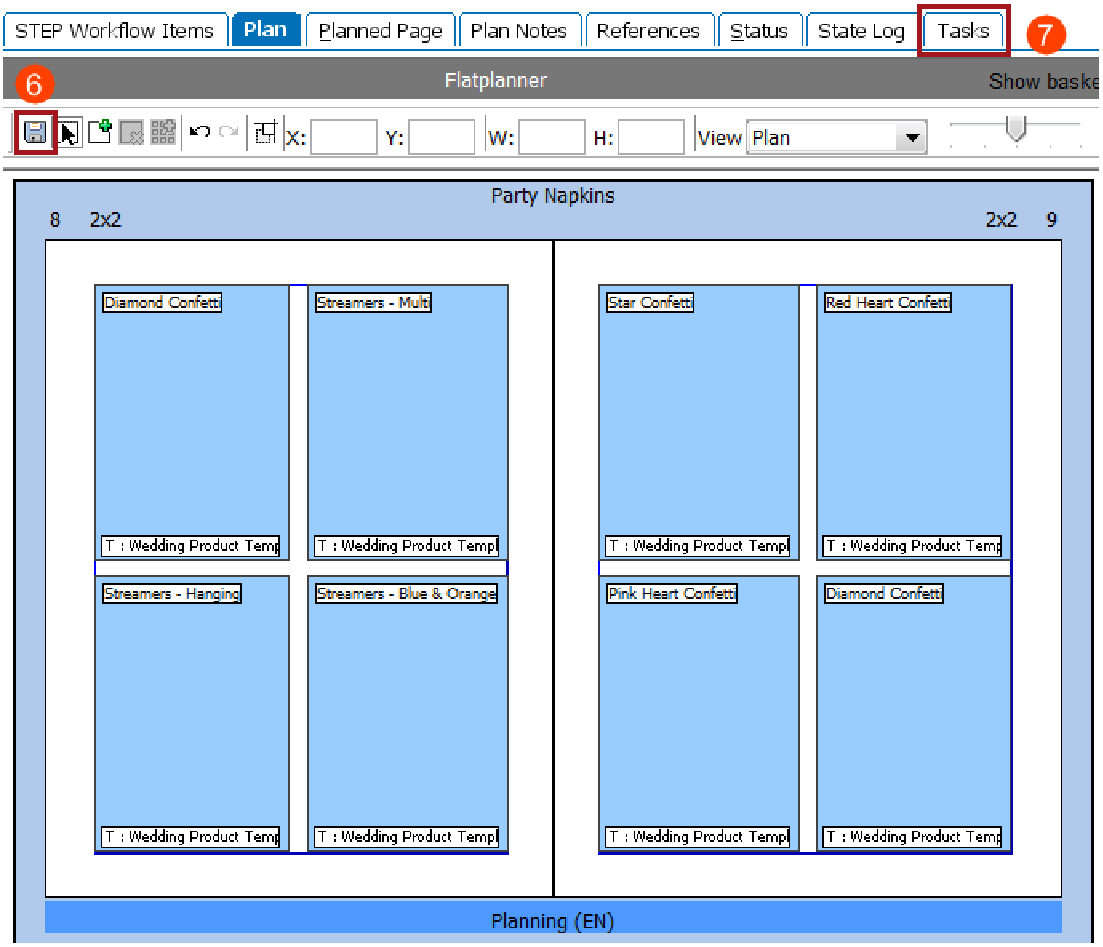
The typical task performed during this state is for a workbench user—for example, a merchandiser who determines product placement in catalogs—to plan the Flatplan pages. The central task of planning a page involves linking products into frames on a Flatplanner page spread (Planned Page). Page planning can be done without using a Flatplanner workflow, but the workflow enables you to receive your page planning assignments as **tasks**.

If you are a page planning user, follow these steps to plan a page in conjunction with our sample Flatplanner workflow:

1. To determine if you have been assigned a page planning task, click the **STEP Workflow** tab, and then click the **Tasks** tab.
2. Navigate to the relevant Flatplanner workflow, then click the **Flipper** icon to view the tasks for the workflow.
3. In the Tasks list, click the first state, **Planning (EN),** to view the pages that are in the Planning state. Unless the task has been assigned directly to you, you will need to click on the 'Show all items' or 'Show all items assigned to me or any group I am a member of' icon [outlined below in red frame] in order to view all available tasks to your User Group.
4. To claim a task and make it unavailable to other users in your User Group, click on the **Claim** icon.
5. In the **Preview** column, click on the page spread that you would like to plan.



6. The planned page spread displays in the **Flatplanner** on the **Plan** tab. Plan your page, and then click the **Save** icon in the toolbar to save the changes.
7. Click on the **Tasks** tab to navigate to the Tasks view.



8. On the **Tasks** tab, click **Submit** to move the spread to the next workflow state. A **Submit items** dialog displays where you can enter information about the page if you wish, but this is optional.
9. Click **Submit Now**. The page moves along to the next state in the workflow, a 'hidden' state named **BGP-MountDocForPlan**.

Auto-generation of the Actual Page

In the **BGP-MountDocForPlan** state, a background process calls the InDesign server. The InDesign server then generates (mounts) the actual pages based on the information linked to the Flatplanner page spread. When completed, the InDesign server saves these actual pages into STEP.

Note: An InDesign server (sidecar) must be connected to your STEP system in order for this background process to run. For more information on the deployment of an InDesign server, contact Stibo Systems.

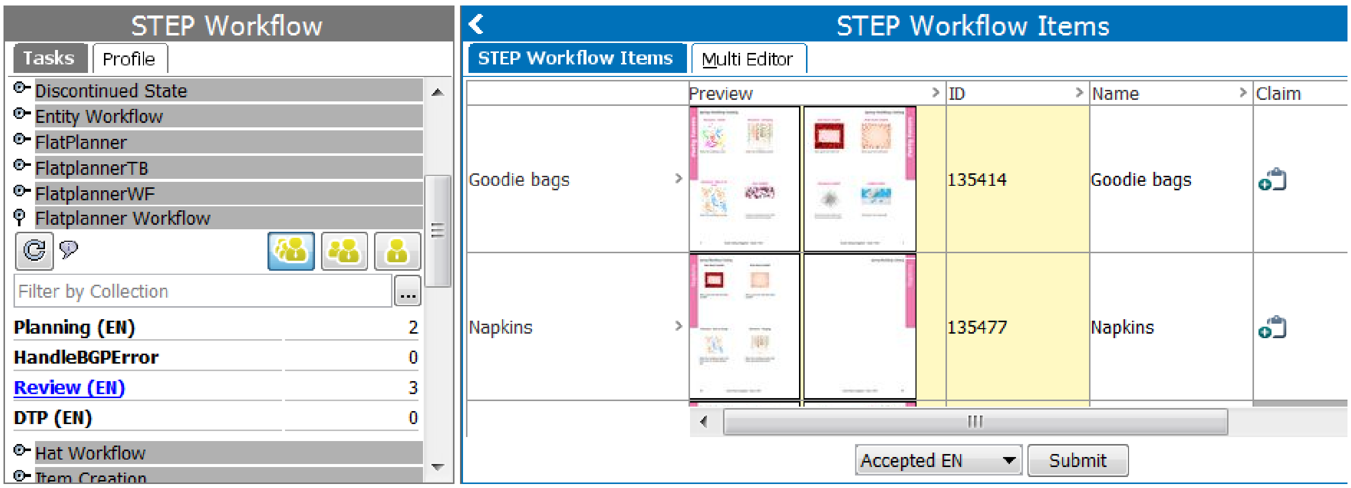
Once the InDesign server saves the actual pages to STEP, the actual pages are routed to the **Review** state.

If the background process fails (for reasons that could include the InDesign server being offline), and the actual pages are not generated by the InDesign server, then business rules may be put in place that will route the planned pages into the **DTPPageWork** state in order for a DTP (Desktop Publishing) operator to manually mount the Flatplan onto actual pages in InDesign.

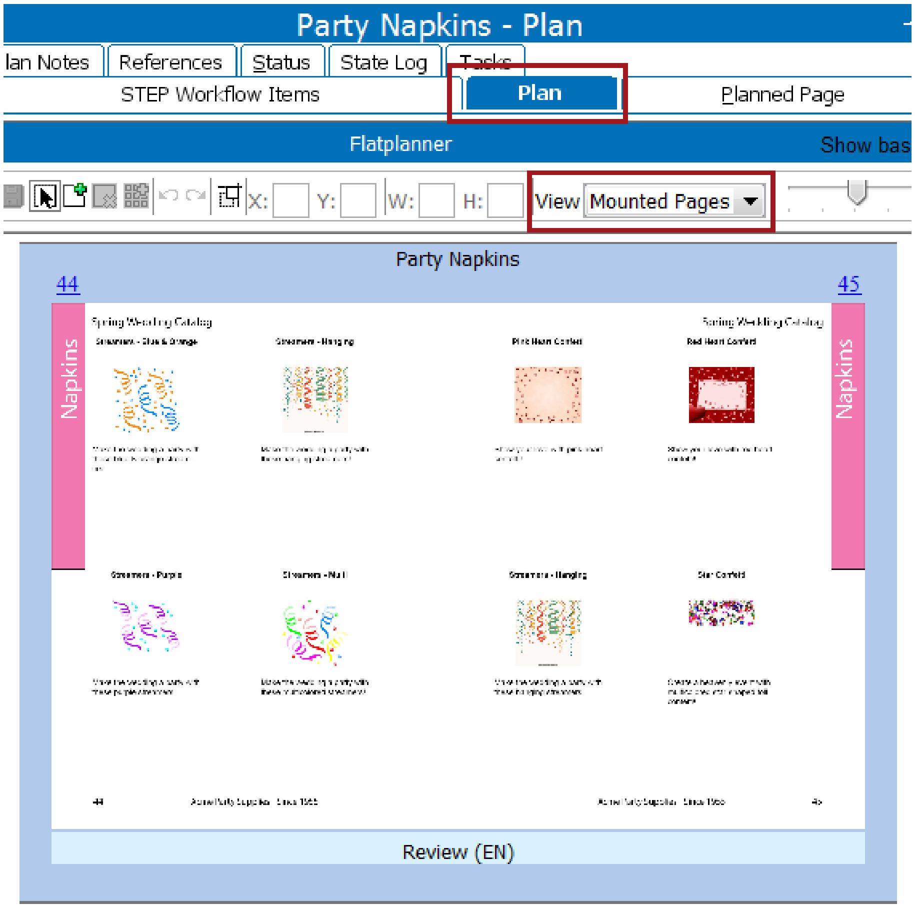
Reviewing the Actual Page

In a typical page reviewing state, you will look at the mounted actual pages to determine if the pages are OK as-is or if they need additional layout work performed in InDesign.

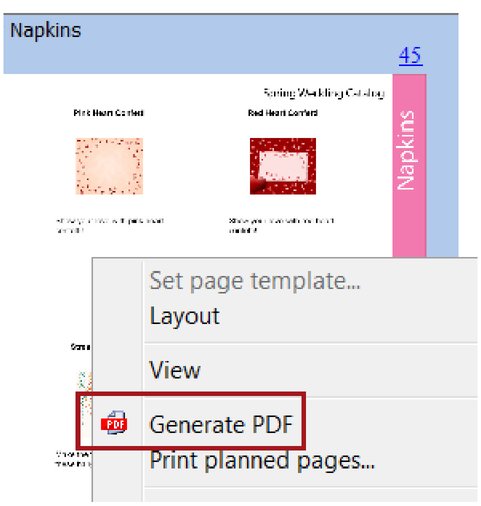
1. To determine if you have been assigned a page reviewing task, follow steps **1 - 4** as outlined in the previous section, except this time click on the **Review (EN)** state.
2. In the **Preview** column, click the page spread that you want to review.



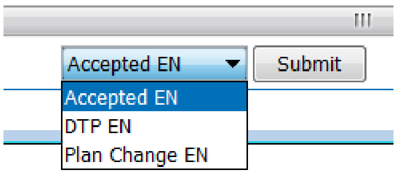
3. The actual page displays in the Flatplanner on the **Plan** tab in the **Mounted Pages** view.



4. If you wish to generate a PDF of the actual page, right click anywhere on the displayed page and select **Generate PDF**. The system will call the InDesign server and a PDF of the page will generate and open automatically.



5. When you have finished reviewing the page, the following **Submit** options are available in our sample workflow:



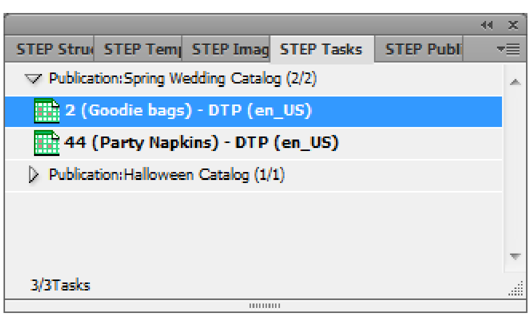
- **Accepted EN**: The page is approved and is sent to the **Done** state of the workflow, at which point it is removed from the workflow.
- **DTP EN:** The page needs some manual work performed on it by a DTP operator in InDesign. The page will be sent to the **DTPPageWork** state [**DTP (EN)**], which is a state in which the task must be accepted in InDesign.
- **Plan Change EN:** The Flatplan needs more planning work performed in the workbench. The page will be returned to the **Planning (EN)** state.

Accepting a DTP Task in InDesign

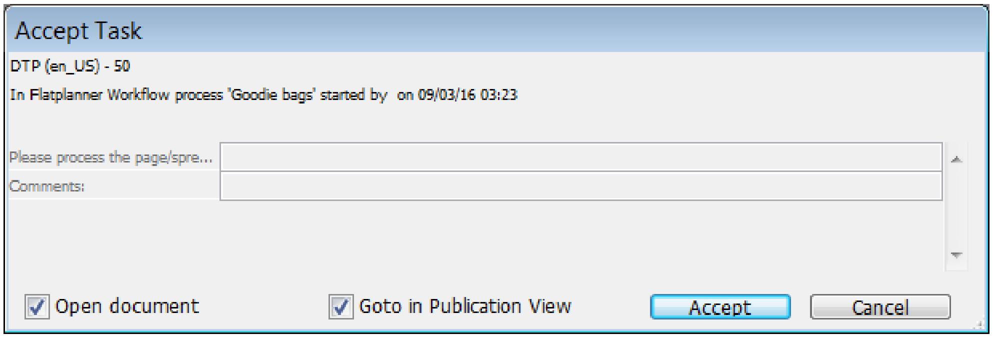
If the page reviewer chose the **DTP EN** transition from the Review state in the workbench, the page is routed to the **DTPPageWork** state [**DTP (EN)**] in our sample Flatplanner workflow. Tasks in the DTPPageWork state must be accepted from within InDesign.

To accept a Flatplanner workflow task from within InDesign, follow these steps:

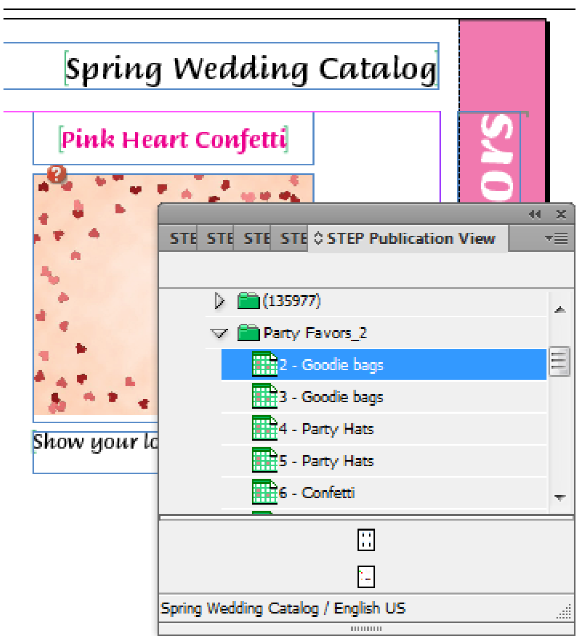
1. Open InDesign and log onto the relevant STEP system.
2. Navigate to Window > **STEP Tasks**. The **STEP Tasks** panel displays.
3. Click the arrow next to the relevant publication to expand all tasks that are available for that publication.



4. Right-click on the relevant page, then click **Accept Task**. The **Accept Task** dialog displays.

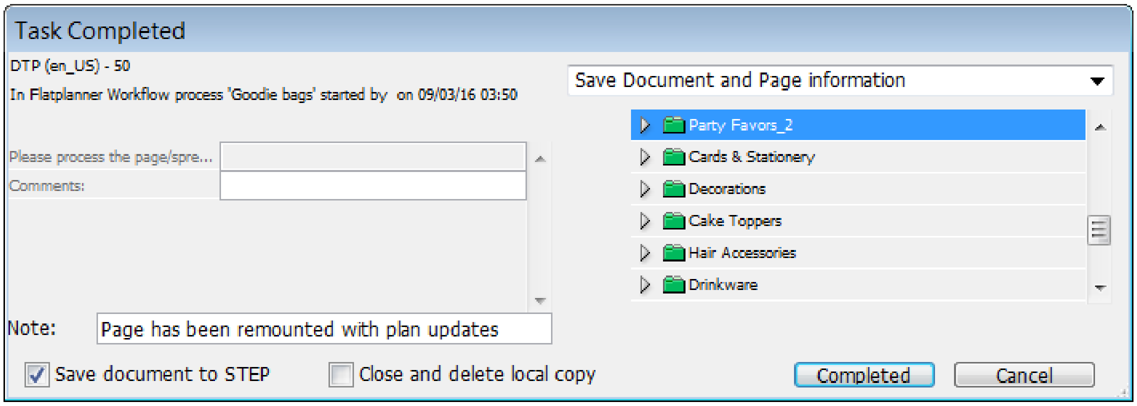


5. Click **Accept** to simultaneously open the document and the **STEP Publication View** panel, where the accepted page will be highlighted.



Note that **Open document** and **Goto in Publication view** are checked by default in the Accept Task dialog. Uncheck **Open document** if you would like to finish claiming the task but open the document later. Uncheck **Goto in Publication View** if you do not want the STEP Publication View panel to automatically display when the page is opened.

6. Once you have finished work on the pages, return to the **STEP Tasks** panel. Right-click the page that you were just working on (which is distinguishable by no longer being in bold text), then click **Task Completed**. The **Task Completed** dialog displays.



7. To save the finished document back to STEP (which is the most common action at this stage of the workflow), check the **Save document to STEP** box, then click **Completed**. The Section folder where the actual pages should be saved in STEP is highlighted automatically. Optionally, you may leave a comment in the **Note** field (and/or **Comments** field, if present, depending on your workflow's configuration).

   If you prefer to not save your documents locally and only save them in STEP, then check **Close and delete local copy** before clicking **Completed**.

Note: The page must first be saved locally, regardless, before it can be saved back to STEP.

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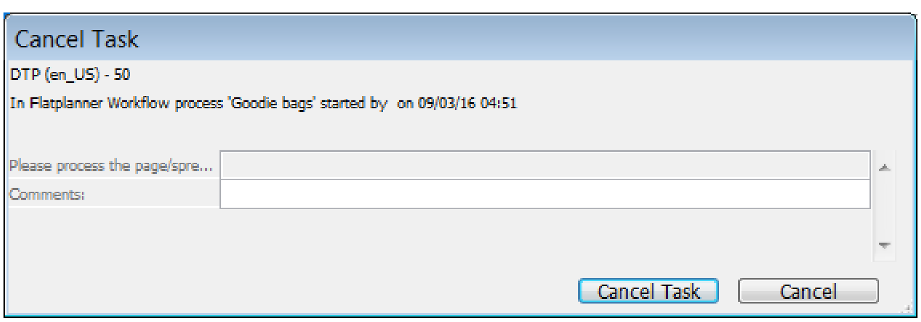
8. In our sample workflow, the actual page will now be routed back to the **Review** state for final signoff by a page reviewer (e.g., the merchandiser).

Canceling a DTP Task in InDesign

If, after you claim the task in InDesign, you determine that you need to release it back to your user group so another user can claim it, you may cancel the task. To cancel the task, follow these steps:

1. In the **STEP Tasks** panel, right-click on the page and select **Cancel Task**. The **Cancel Task** dialog displays.



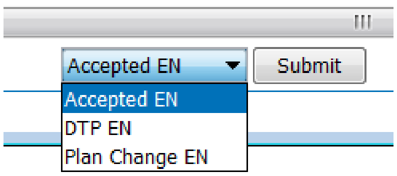
2. Click **Cancel Task** to reject the task, enabling another user from your group to claim it. The task will remain in the **STEP Tasks** panel and return to bold text.

If your workflow has been configured with a Comments variable, you may optionally leave a comment in this field. For more instruction on how to configure the Tasks view in InDesign, see the **Configuring Flatplanner Workflows** section of the **Flatplanner** documentation.

Final Review

When the InDesign page has been completed, or if it never needed to be updated in the first place, the page will be in the **Review** state of our sample Flatplanner workflow. To complete the journey of the page, follow these steps:

1. Follow the same steps as outlined in the previous **Reviewing the Actual Page** section of this topic.
2. When happy with the page, select **Accepted EN** to route the page to the **Done** state. Typically, an on-entry business rule action will be applied to the state to automatically remove the page from the workflow.



Starting and Stopping Flatplanner Workflows

Planned Pages (also known simply as **pages** or **spreads**) can be initiated into a Flatplanner workflow both manually and automatically. By either method, planned pages can be initiated into a workflow on a one-at-a-time basis or in bulk actions where multiple pages are initiated at once.

Pages can be initiated manually from both the **Publication Planner** and **Tree**, and automatically upon their creation when the primary Flatplanner workflow is set to initiate automatically.

Planned Pages can be manually removed from a Flatplanner workflow from the same two locations where they can be manually initiated: the Publication Planner and the Tree.

Starting the Workflow Manually

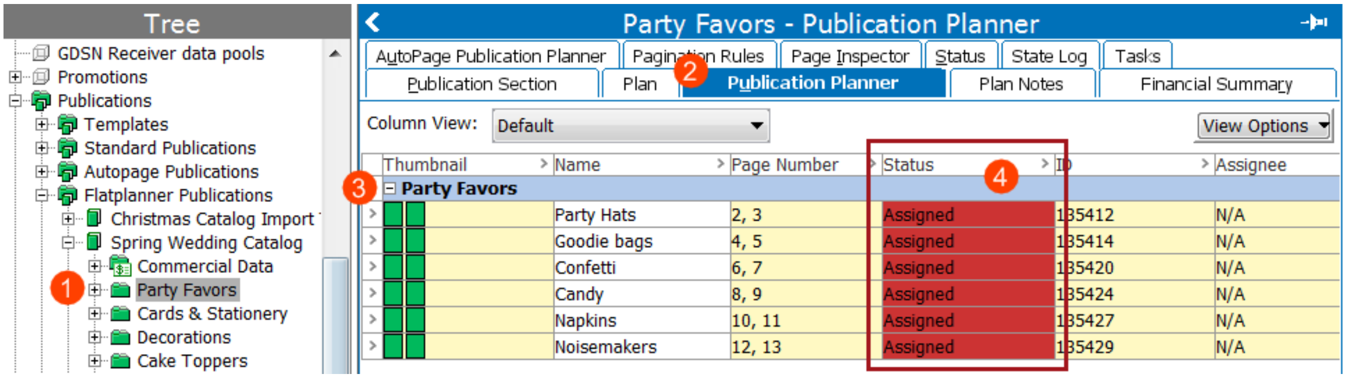
If your Flatplanner workflow has not been configured to initiate automatically, you will need to manually initiate your Planned Pages into the workflow. Planned Pages can be initiated into a Flatplanner workflow from two locations: the **Publication Planner** and the **Tree**.

Method 1 - Publication Planner

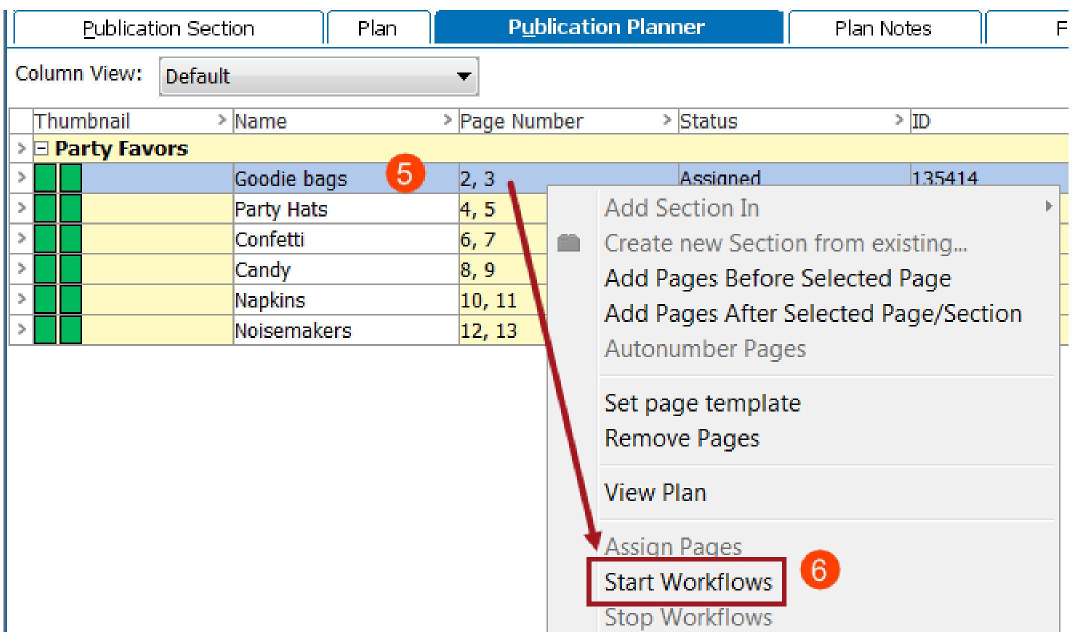
To manually initiate a Planned Page into a Flatplanner workflow from the Publication Planner, follow these steps:

1. In the **Tree**, expand the **Publication** hierarchy, and then select the relevant **publication** or **section**. The Publication Planner is accessible from both locations.
2. Click on the **Publication Planner** tab.
3. On the **Publication Planner** tab, click the plus **+** sign next to the relevant section to view the Planned Pages within the Section. If your Publication Planner view has not been configured with the 'Group by section' view option, the Section name and **+** sign will not appear.

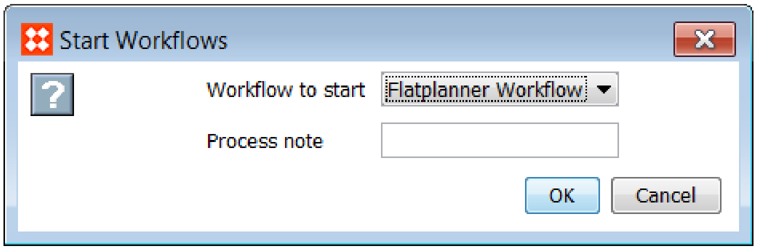
4. Planned Pages that are not already in a workflow will show a status of **Assigned** in the Publication Planner. Assigned means that the planned page will automatically be assigned to a User Group once the page is initiated into the workflow.



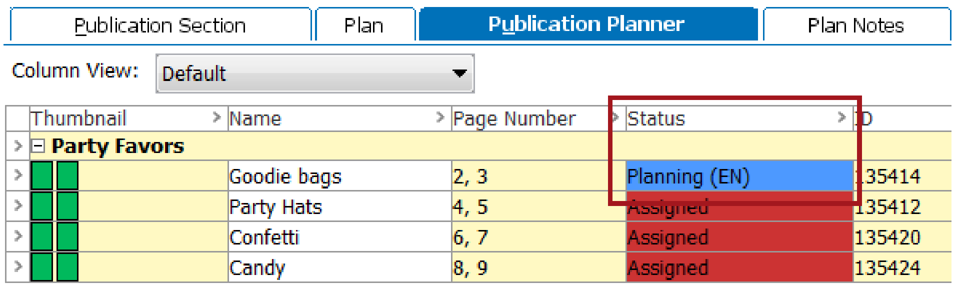
5. Select the Planned Page spread or spreads that you would like to initiate into a Flatplanner workflow. Spreads may be multi-selected by holding Ctrl or Shift while making selections.
6. Right click and select **Start Workflows**. The **Start Workflows** dialog displays.



7. In the **Start Workflows** dialog, select the relevant workflow from the **Workflow to start** dropdown list, then click **OK**. Optionally, you may enter a process note in the **Process note** field.



8. The Planned Page is initiated into the initial state of the selected Flatplanner workflow.

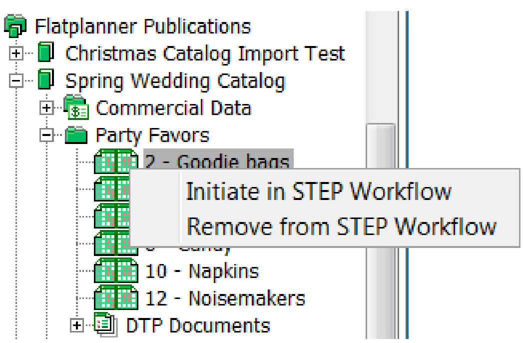


Note: Once a Planned Page (spread) has been initiated into a Flatplanner workflow, it may not be initiated into another Flatplanner workflow.

Method 2 - Tree

To manually initiate a Planned Page into a Flatplanner workflow from the Tree, follow these steps:

1. In the Tree, navigate to the Planned Page(s) that you would like to initiate into the workflow.
2. Right-click and select **Initiate in STEP Workflow**. Multiple Planned Page spreads may be chosen at once by holding Ctrl or Shift while making selections.

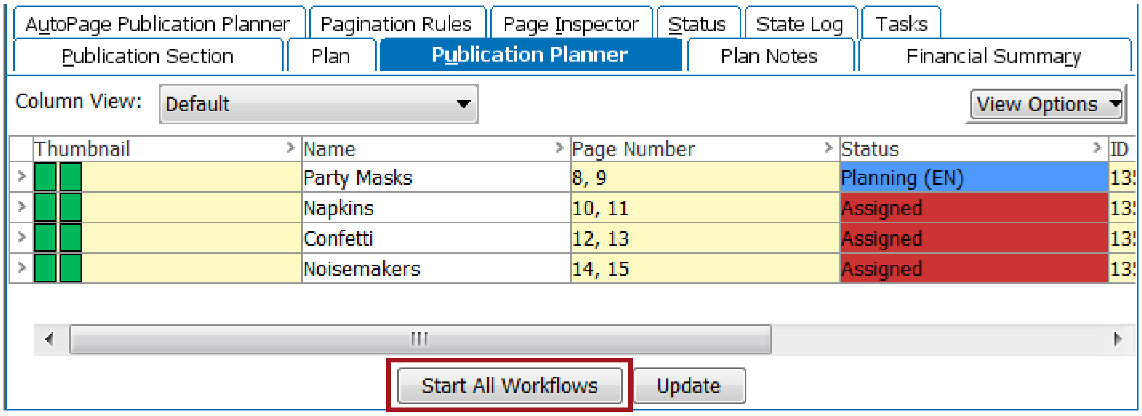


3. In the **Start Workflows** dialog, select the relevant workflow from the **Workflow to start** dropdown list, then click **OK**. Optionally, you may also enter a process note in the **Process note** field.
4. The Planned Page is initiated into the initial state of the selected Flatplanner workflow.

Note: Once a Planned Page has been initiated into a Flatplanner workflow, it may not be initiated into another Flatplanner workflow.

Start All Workflows Option in Publication Planner

As outlined in the steps in the previous two sections, multiple Planned Pages can be initiated into a workflow by multi-selecting them in the Tree or Publication Planner. A third option also exists to submit Planned Pages into a workflow at once: the **Start All Workflows** button in the Publication Planner.



Clicking **Start All Workflows** is essentially the same thing as multi-selecting all Planned Pages in the Publication Planner, right-clicking, and selecting **Start Workflows**. This button merely provides the convenience of a one-click operation to achieve the same outcome.

Starting the Workflow Automatically

If the Flatplanner workflow is set to auto-initiate, new spreads will automatically appear in the initial state in the Publication Planner.

In order to allow Planned Pages to initiate automatically in the workflow, follow these steps, which are the same as for any standard STEP workflow:

1. In **System Setup**, navigate to the relevant Flatplanner workflow.
2. On the **STEP Workflow Editor** tab, check the **Initiate automatically** box.
3. New Planned Pages will automatically initiate into this workflow when created.

Note: Though STEP systems of version 8.0 and above allow the existence of more than one Flatplanner workflow, only *one* Flatplanner workflow at a time should ever be set to auto-initiate. Allowing Planned Pages in more than one workflow at once can cause conflicts if more than one user is working on the same page at the same time, as STEP provides no version control to prevent multiple users from saving over each other's work.

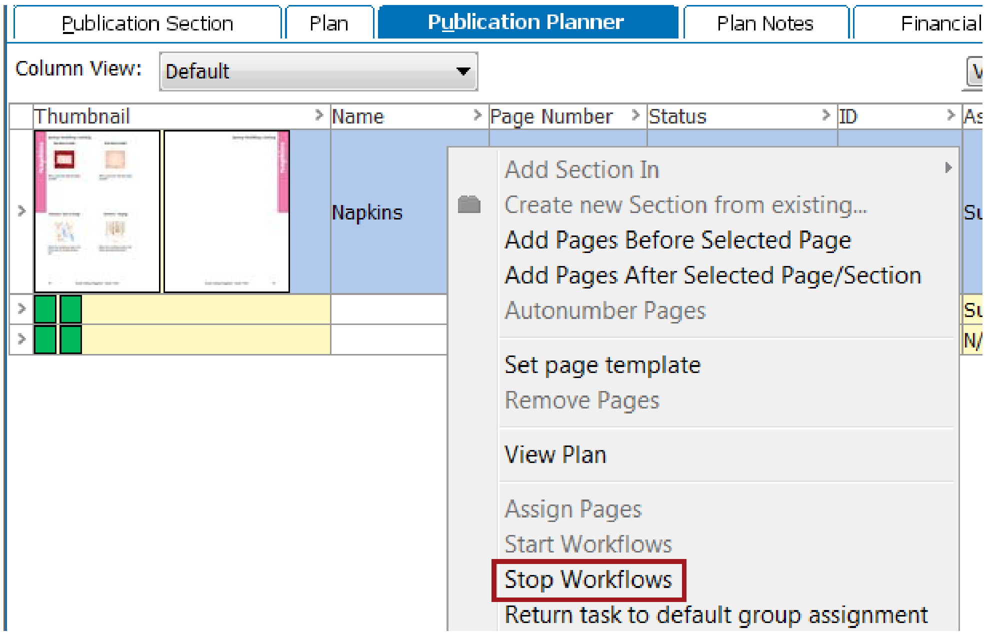
Stopping the Workflow

Planned Pages may be manually removed from workflows in the same two locations where they can be started manually: in the **Publication Planner** and in the **Tree**.

Method 1 - Publication Planner

To remove a Planned Page from a Flatplanner workflow from the Publication Planner, follow these steps:

1. In the **Tree**, expand the **Publication** hierarchy, and then select the relevant Publication or Section.
2. On the **Publication Planner** tab, click the plus **+** sign next to the relevant Section to view the Planned Pages within the Section.
3. Right click the relevant spread(s) and click **Stop Workflows**.

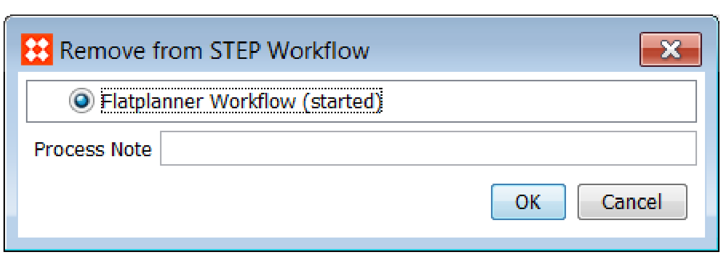


4. The **Stop Workflows** dialog appears. Click **Yes**.
5. The spread is now removed from the workflow.

Method 2 - Tree

To manually remove a Planned Page from a Flatplanner workflow from the Tree, follow these steps:

1. Navigate to the Planned Page(s) that you would like to remove from the workflow.
2. Right-click and select **Remove from STEP Workflow**.
3. In the **Remove from STEP Workflow** dialog, select the workflow that the spread is in, then click OK. (Typically, spreads are only in one workflow.) Optionally, you may also add a Process Note.



4. The spread is now removed from the workflow.

Publication Milestones

The Component Model **Publishing - Milestone Settings** enables monitoring of Flatplan workflow progress in the Publication Planner via the Next Milestone Date/Next Milestone Name and Traffic Light Name columns.

The model allows you to:

- Select the object types where milestone dates can be entered—normally publication but can also be publication section and publication group
- Select the object types where traffic lights can be defined—normally publication group
- Select the attribute that is used to hold the date when the workflow starts and up to 20 additional attributes to hold the subsequent milestone dates
- Up to five traffic light colors can be defined—each of which requires a numeric attribute to store the 'percentage of working time remaining' and a second attribute to store the traffic light color

Component Model 'Publishing - Milestone Settings' Example

Milestone date and period / color configuration in Publication with Milestones component model		
Name	**Example Value**	**Validation Type**
Publication Types defining milestone dates	Publication	
Publication Types defining traffic lights	Publication Group	
Workflow Start	Start Date	ISO Date and Time
Milestone Date #01 Attribute	Plan Page	ISO Date and Time
Milestone Date #02 Attribute	Plan Approved	ISO Date and Time
Milestone Date #03 Attribute	DTP Page Approved	ISO Date and Time
Period #01	Normal Period	Number
Period #01 Colour	Normal Colour	Regular Expression: [0-9a-f]{6}
Period #02	Warning Period	Number
Period #02 Colour	Warning Colour	Regular Expression: [0-9a-f]{6}

Milestone date and period / color configuration in Publication with Milestones component model		
Name	**Example Value**	**Validation Type**
Period #03	Late Period	Number
Period #03 Colour	Late Colour	Regular Expression: [0-9a-f]{6}

The other configuration option that effects the milestones is the definition of the working week. Unless modified the default setting is Monday to Friday from 09:00 to 17:00. Please contact Stibo if you need another definition of a working week. When entering the milestone dates for a publication it is advisable that they are set to be during working time.

Milestone Configuration Example on Publication Level

The attributes that are configured in the Component Model 'Publishing - Milestone Settings' must have values on publication group, publication, or section level. The example below shows how the attributes might be configured for a particular publication.

Attribute values at a publication		
Attribute	**Example value**	**Description**
Start Date	2013-08-20 09:00:00	Tuesday
Plan Page	2013-09-02 09:00:00	Monday
Plan Approved	2013-09-10 09:00:00	Tuesday
DTP Page Approved	2013-09-20 09:00:00	Friday
Normal Period	100	If the remaining working time is 100% then...
Normal Colour	'green'	... the traffic light is green
Warning Period	40	If the remaining working time is 40% then...
Warning Colour	'amber'	... the traffic light is amber

Attribute values at a publication		
Attribute	**Example value**	**Description**
Late Period	0	If the remaining working time is 0% then...
Late Colour	'red'	... the traffic light is red

The milestone and traffic light information shown in the Publication Planner for a given page is calculated in the following way:

- The workflow variable MILESTONE contains the Attribute ID of the next milestone date applicable to that flatplan workflow. This variable is set by the business rules attached to the states within the workflow.
- The name of this attribute is displayed in the Next Milestone Name column of the Publication Planner
- The Next Milestone date is the value of the attribute obtained from the first publication/publication group above the Flatplan with a value.
- The duration of the current task is then calculated as the amount of working time between the next milestone date and the milestone prior to that date.
- The amount of remaining working time is then calculated as the difference between the next milestone date and the current date and time.
- The percentage of remaining time is the amount of remaining working time as a percentage of the duration of the current task. This can be greater than 100% and can also be negative if the next milestone date is in the past.
- The traffic light is selected based on the percentage of remaining working time. From the above example: percentages of 0% or less will show as red, 40% to 1% as amber, and everything else as green.
- The Traffic Light Name is the name of the attribute defining the traffic light color.

Monitoring of Flatplan workflow progress in the Publication Planner Example

Assuming that a publication has been created with the example dates and colors shown in the table above, and that the current time is Friday 2013-09-06 09:00:00, then this is how the traffic light colors would be calculated.

Flatplan page-workflow and traffic light status with current date/time 2013-09-06 09:00:00			
Page	**Workflow MILESTONE**	**Colour**	**Explanation**
1	Plan page	'red'	The next milestone date is (Plan Page) 2013-09-02 09:00:00

Flatplan page-workflow and traffic light status with current date/time 2013-09-06 09:00:00			
Page	**Workflow MILESTONE**	**Colour**	**Explanation**
			The previous milestone date is (Start Date) 2013-08-20 09:00:00 The duration of the current task is therefore 8 working days The current date/time exceeds (Plan Page) 2013-09-02 09:00:00 by 6 working days. -6 as a percentage of 8 is -78% and so the corresponding color is 'red'
2-3	DTP Page approved	'green'	The next milestone date is (DTP Page Approved) 2013-09-20 09:00:00 The previous milestone date is (Plan Approved) 2013-09-10 09:00:00 The duration of the current task is therefore 8 working days There are 10 working days from the current date/time until the next milestone date 10 as a percentage of 8 is 125% and so the corresponding color is 'green'
4-5	Plan Approved	'amber'	The next milestone date is (Plan Approved) 2013-09-10 09:00:00 The previous milestone date is (Plan Page) 2013-09-02 09:00:00 The duration of the current task is therefore 6 working days There are 2 working days from the current date/time until the next milestone date 2 as a percentage of 6 is 33% and so the corresponding color is 'amber'