

STEP'N'DESIGN USER GUIDE

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

StiboSystems

STEP Trailblazer 8.1

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About This Guide

The STEP'n'design User Guide contains information about the STEP'n'design component.

The guide assumes that users have:

- A working knowledge of InDesign
- A working knowledge of the STEP workbench
- A working knowledge of STEP Flatplanner (if using this component)
- A working knowledge of STEP AutoPage (if using this component)
- An assigned STEP user name and password in order to connect to the STEP database

Note: The guide only contains information about the STEP'n'design component. For more information about STEP, see the STEP User Guide and the Online Help. For more information about Flatplanner, see STEP Flatplanner User Guide. For more information about AutoPage, see STEP AutoPage User Guide.

About STEP'n'design

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

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

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

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

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

- Integration with publishing workflows, easing communication between departments in production environments (*only available with the Flatplanner and STEP Workflow components*)

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

Topics covered in this documentation include:

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

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

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

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

Mounting (Paginating)

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

Templates

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

For more information, see the **Templates in STEP'n'design** topic.

Saving Documents to STEP

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

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

For more information, see the following topics:

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

Updating Documents and Writing Back Data to STEP

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

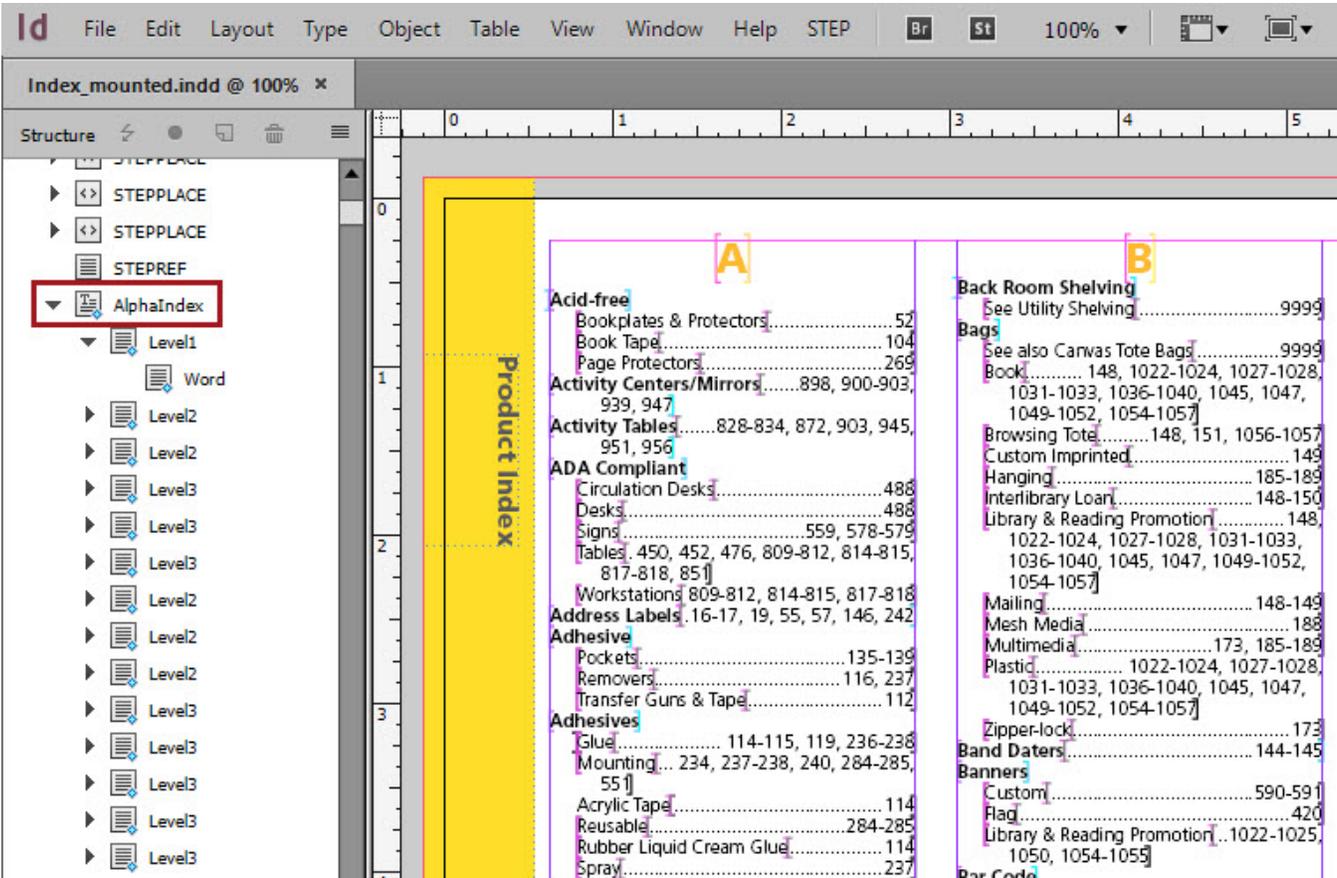
You can also work the other way around and update the STEP database with the latest changes from content on your mounted pages.

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

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

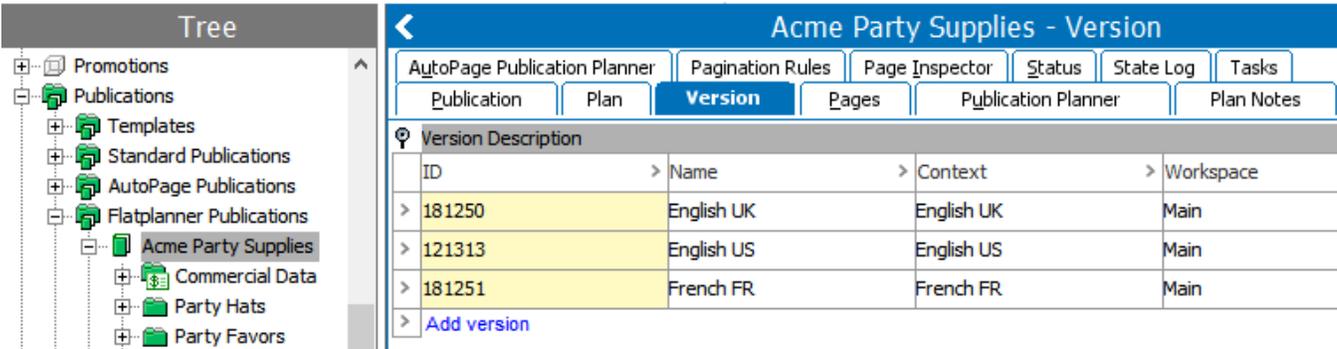
Creating Indexes

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



Publications and Versions

Because STEP can store multiple 'views' of the same data in different contexts and workspaces, STEP'n'design allows for these different contexts to be represented in publications by **versions**. Versions are modeled around specific language and country views of data. Versions can also be created to support currency zones, vertical markets, or types of catalog. Individual publication versions are typically mounted on separate layers within the STEP'n'design document (publication template, or mounting page).



The advantages of using different versions and layers include:

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

For more information about creating publications and versions, see **Creating and Removing a Publication Version** in the **Getting Started / STEP User Guide** documentation. For more information about working with versions, see the **Working With Version Layers** topic.

Publishing (Flatplanner) Workflows

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

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

Installing STEP'n'design

This section contains information about installing the STEP'n'design plug-in(s) on your local computer and logging on to STEP from within InDesign. This topic assumes the following:

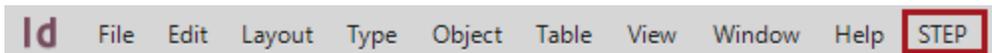
- You have InDesign installed on your computer
- You have been assigned a STEP user name and password
- A publication containing at least one publication version has already been created in your STEP system. A publication version is required to define the workspace and context in which you will be working. For more information about creating a publication version, see **Creating and Removing a Publication Version** in the **Getting Started / STEP User Guide** documentation.

Installing the STEP'n'design Plug-in

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

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

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



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

1. In your browser, navigate to the WebStart page for your STEP system and locate the STEP'n'design icon at the bottom of the screen.



2. Click on the 'STEP'n'Design' icon to display the supported plug-ins for your STEP system. The selection of plug-ins may be different depending on the release version and/or patch level of your system.



3. Select the plug-in that matches the version and platform of InDesign that you are running. For Windows users, the plug-in is contained within a .ZIP file. For Mac users, the plug-in is contained within a .dmg file. The file should download automatically, though the file may download differently depending on your browser settings. The following screenshot shows how the downloaded .ZIP file appears at the bottom of a browser window in Chrome.



4. Locate the ZIP file in its download location (such as your Downloads folder or other default download location), then move it into your Adobe InDesign **Plug-Ins** folder. For Windows platforms, the file path format is as follows. ('Adobe InDesign CC 2015' will be replaced with the specific version of InDesign that you are using.)
 C:\Program Files\Adobe\Adobe InDesign CC 2015**Plug-Ins**
5. Unzip the file directly into the Plug-Ins folder. Optionally, you can create your own folder within the Plug-Ins folder to store the STEP'n'design plug-in (for example, 'STEPplugins'), but this is not necessary.
6. Once unzipped, your Plug-Ins folder should resemble the following. The ZIP file may be deleted at this point, though it is not required to do so.

« OSDisk (C:) » Program Files » Adobe » Adobe InDesign CC 2015 » Plug-Ins

Name	Date modified	Type
Data Services	10/3/2016 2:37 PM	File folder
Dictionaries	10/3/2016 2:37 PM	File folder
Filters	10/3/2016 2:37 PM	File folder
Graphics	10/3/2016 2:37 PM	File folder
ICWF	10/3/2016 2:37 PM	File folder
indesign-step-n-design.win.client.cc11	12/6/2016 5:15 PM	File folder
Interactive	10/3/2016 2:37 PM	File folder
Layout	10/3/2016 2:37 PM	File folder
Page Item	10/3/2016 2:37 PM	File folder
PMPack	10/3/2016 2:37 PM	File folder
Prepress	10/3/2016 2:37 PM	File folder
Sandbox	10/3/2016 2:37 PM	File folder
SavebackService	10/3/2016 2:37 PM	File folder
Script	10/3/2016 2:37 PM	File folder
SettingsInCloud	10/3/2016 2:37 PM	File folder
Tables	10/3/2016 2:37 PM	File folder
Text	10/3/2016 2:37 PM	File folder
UI	10/3/2016 2:37 PM	File folder
Utility	10/3/2016 2:37 PM	File folder
Workflow	10/3/2016 2:37 PM	File folder
Workgroup	10/3/2016 2:37 PM	File folder
XMedia	10/3/2016 2:37 PM	File folder
indesign-step-n-design.win.client.cc11.zip	12/6/2016 5:15 PM	Compressed (zipp...

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

Name	Type
(step-n-design.logic.win.cc11 Resources)	File folder
(step-n-design.ui.win.cc11 Resources)	File folder
step-n-design.logic.win.cc11.pln	InDesign 3d Party Plug-in
step-n-design.ui.win.cc11.pln	InDesign 3d Party Plug-in

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

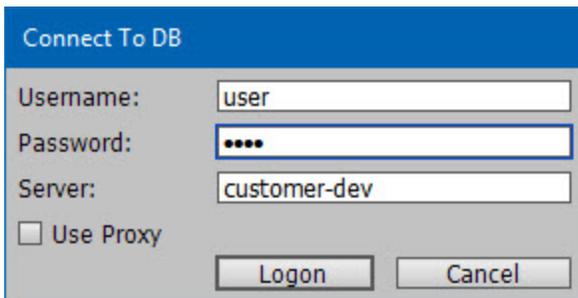


8. After installing the plug-in in the Plug-Ins folder, open your InDesign client to complete the installation process and log onto STEP.

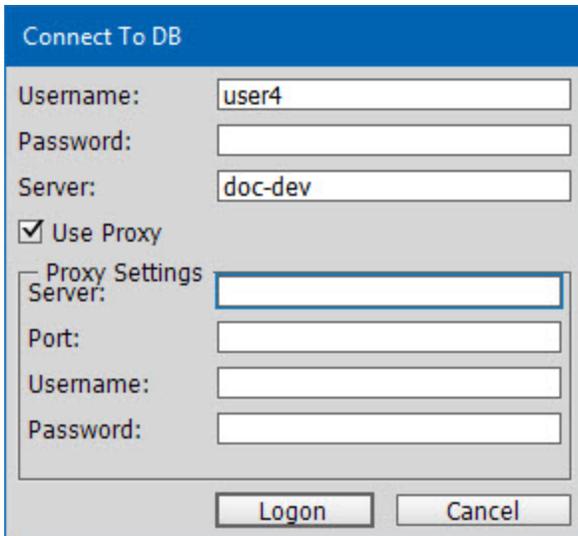
Logging on to STEP from InDesign

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

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



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



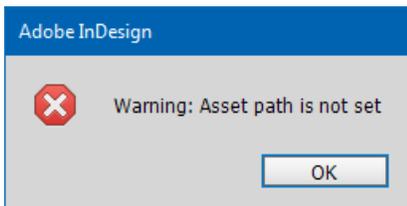
The 'Connect To DB' dialog box contains the following fields and options:

- Username:** user4
- Password:** (empty)
- Server:** doc-dev
- Use Proxy
- Proxy Settings:**
 - Server:** (empty)
 - Port:** (empty)
 - Username:** (empty)
 - Password:** (empty)
- Buttons:** Logon, Cancel

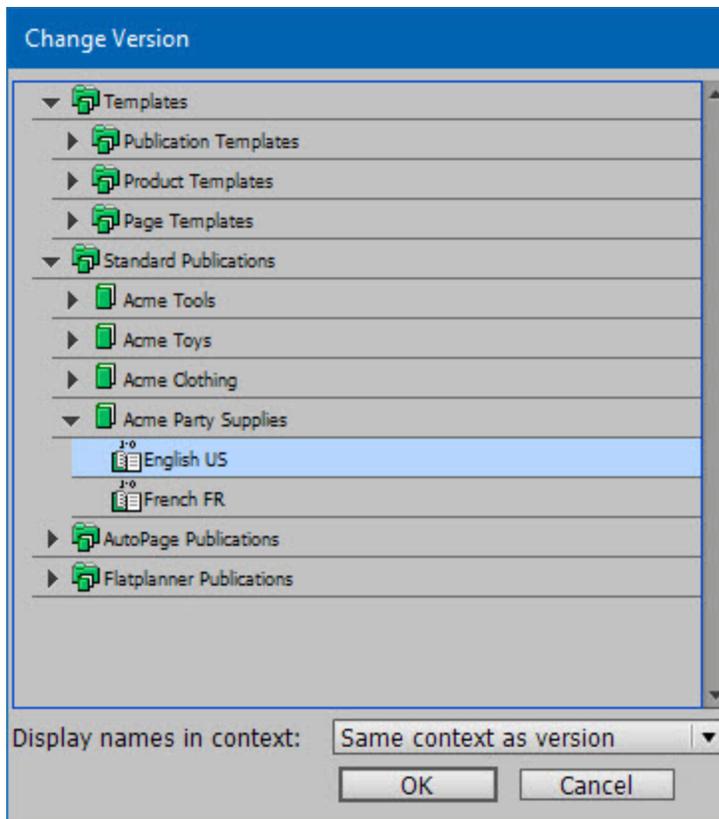
Note: If using http://, by default the system will connect using a port number. If SSL is enabled and you are using https://, then the system will connect using a different port number for the same server. For more information, please contact Stibo support staff.

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

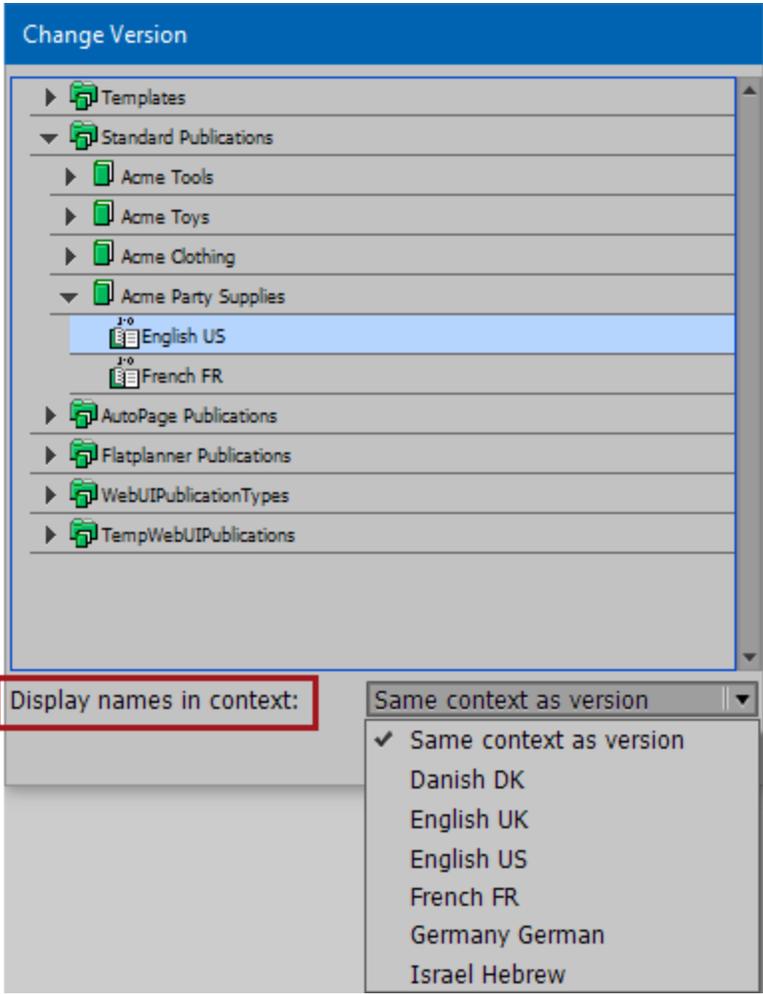
For information on setting an asset path and disabling this warning, see the **Linking to an Asset Location** topic.



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



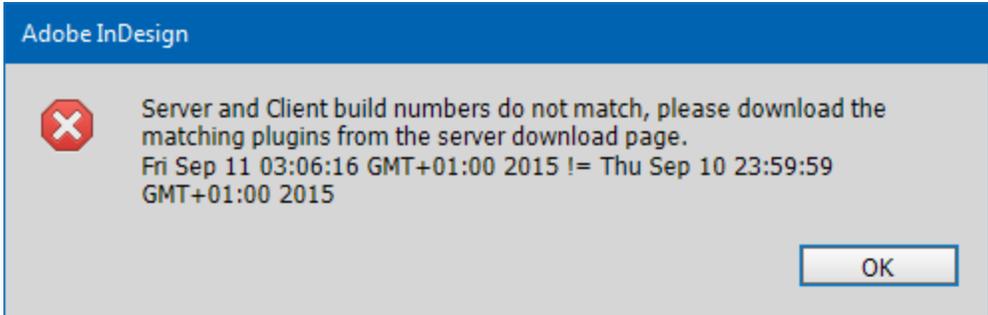
9. Navigate to the relevant publication, then click the black arrow to the left of the publication icon to display the available versions for the publication.
10. Select a version, then click **OK**.
11. To use a different display language than that of your publication version for object names and attribute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



Reinstalling the STEP'n'design Plug-in After System Patches and Upgrades

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

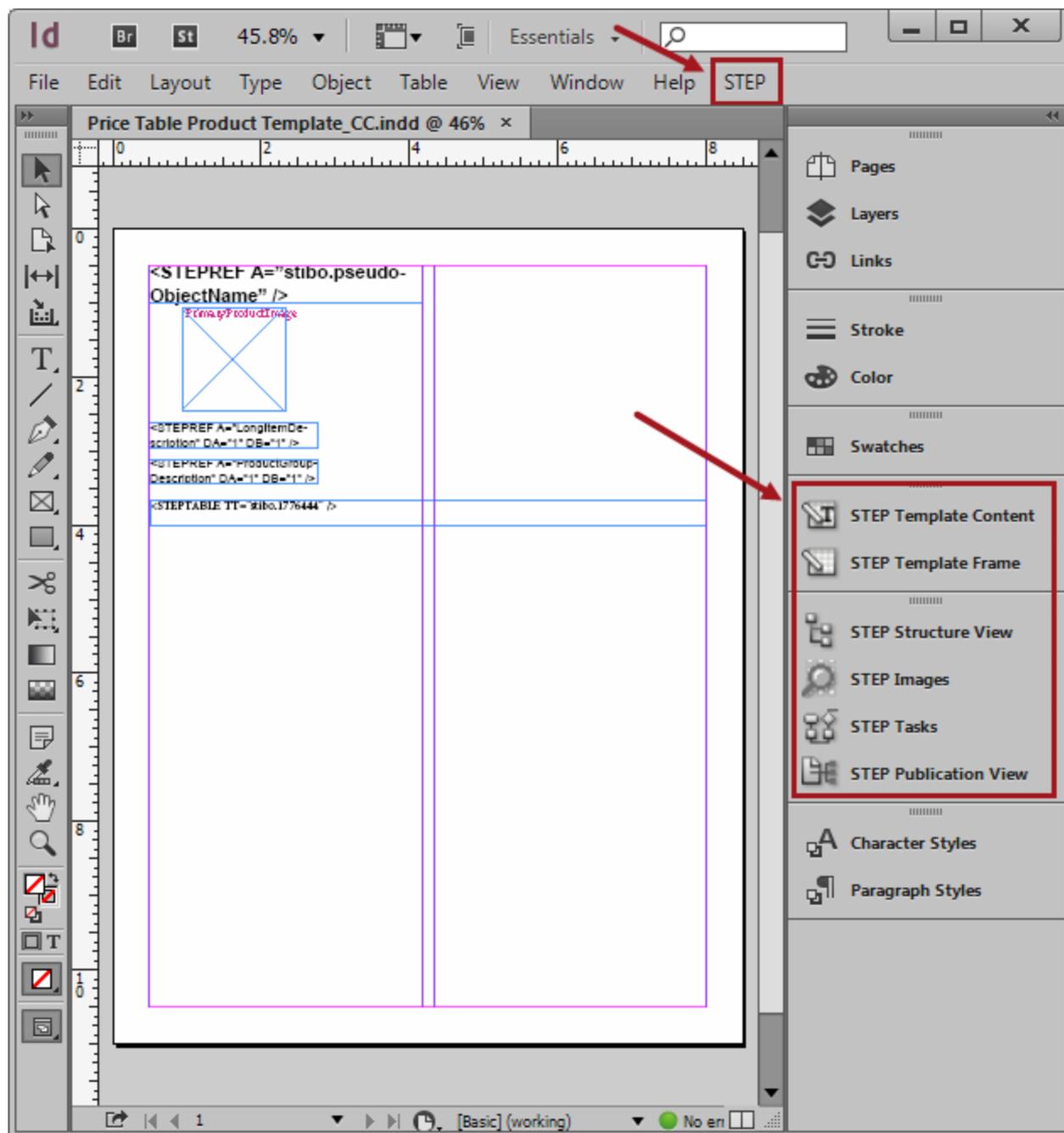
If the build level of your STEP'n'design plug-in does not match the build level of your STEP system, you will receive a warning such as the below after you connect to your STEP server from InDesign:



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

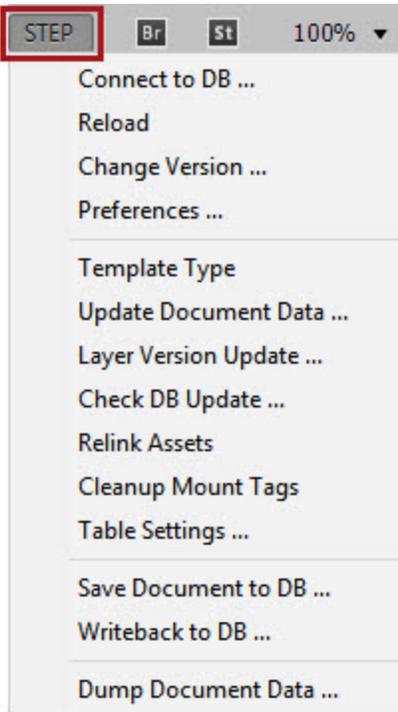
Description of the InDesign Interface

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



STEP Menu

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



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

Connect to DB

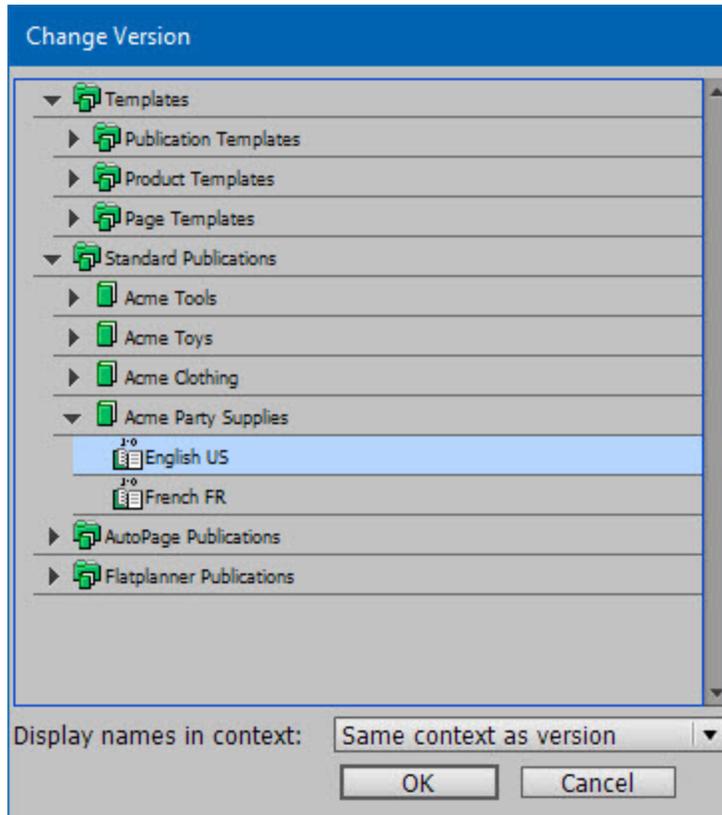
Use this command to connect your InDesign client to the STEP database. For more information about connecting to STEP, see the **Installing STEP'n'design** topic.

Reload

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

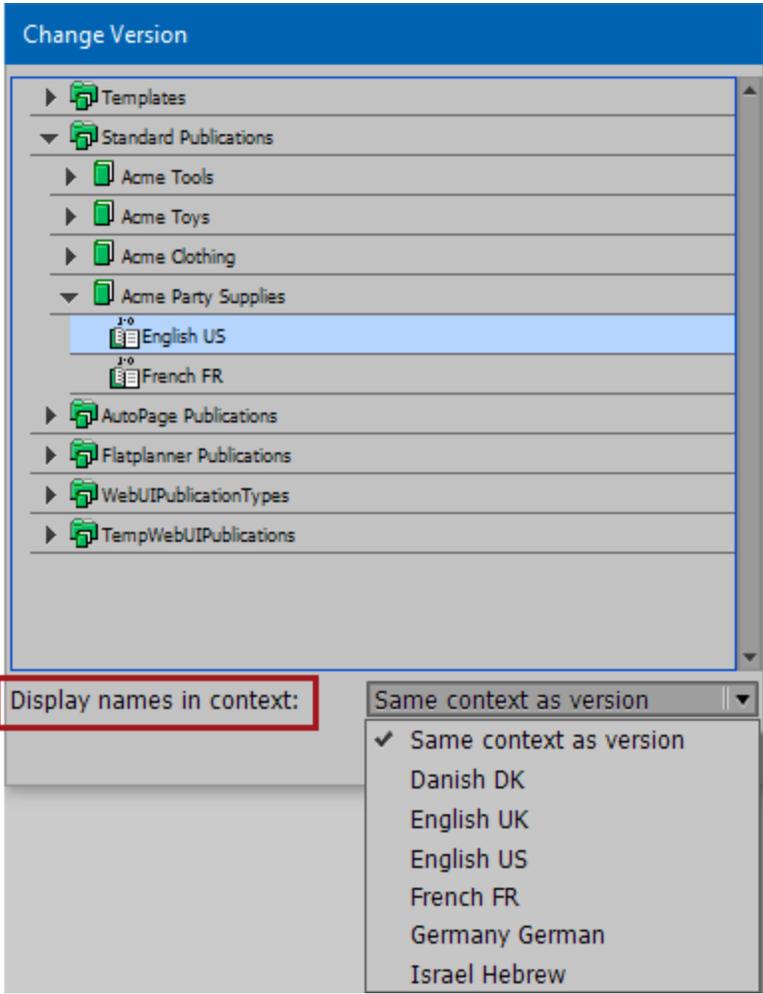
Change Version

Use this command to change the publication version that you are working in and/or the context in which object names are displayed in the STEP palettes. A publication version defines the workspace and context from which mounted data is being pulled from STEP. For more information about creating a publication version, see **Creating and Removing a Publication Version** in the **Getting Started / STEP User Guide** documentation.

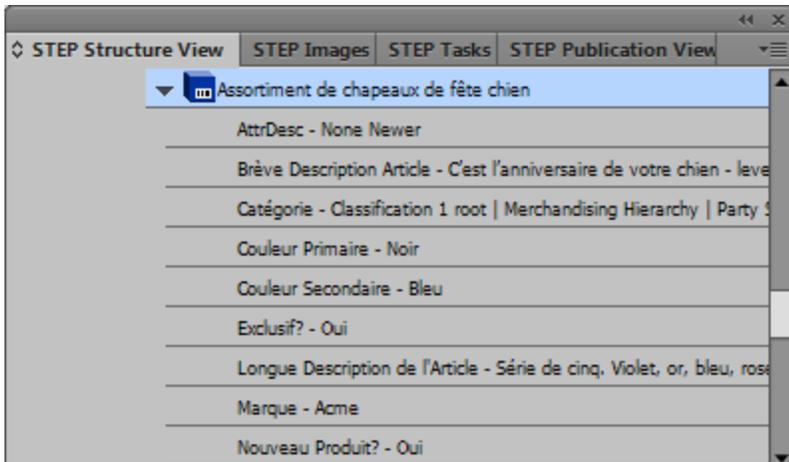


Display names in context

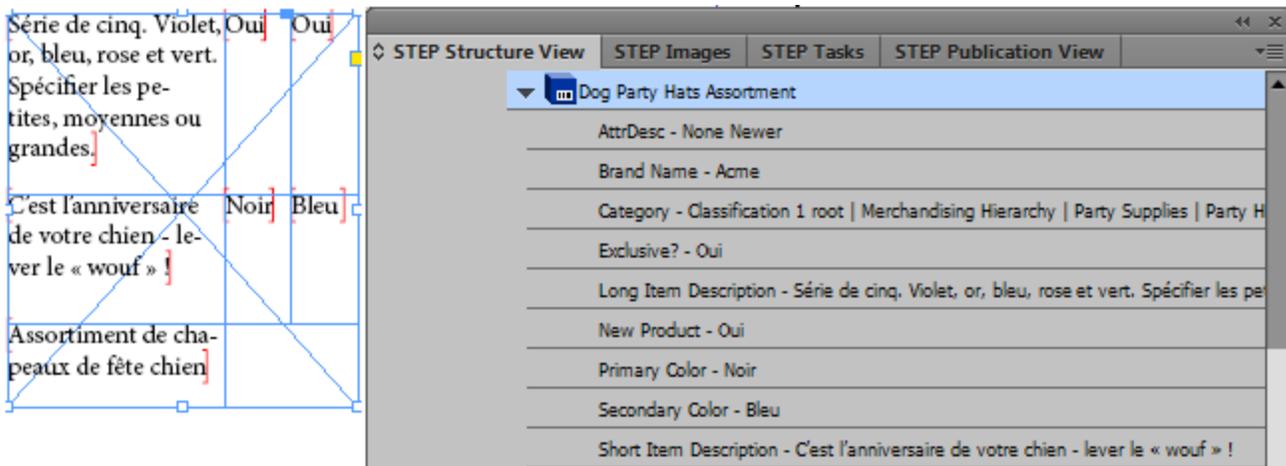
At the bottom of the Change Version dialog is the 'Display names in context:' dropdown menu, which allows you to choose the display language for object names and attribute names in the following STEP palettes: STEP Structure View, STEP Template Content, STEP Images, and STEP Publication View.



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

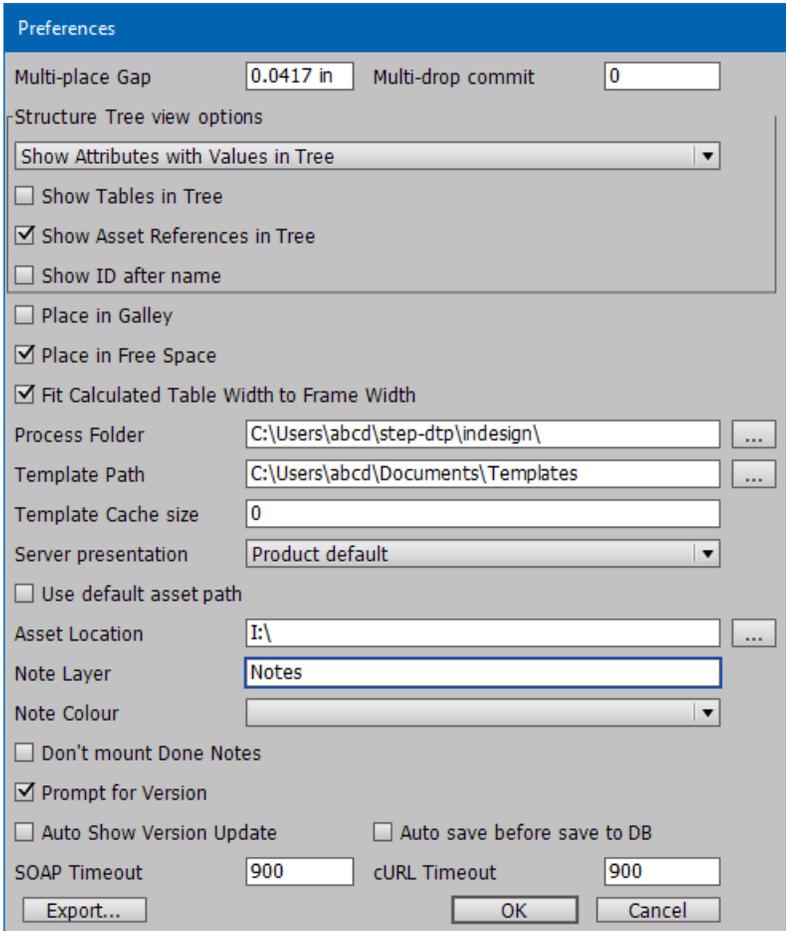


To remedy this situation, the English speakers would select 'English US' from the 'Display names in context' dropdown menu. The following screenshot shows the same object in the STEP Structure View palette while working with a French publication version but with English chosen as the display language.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



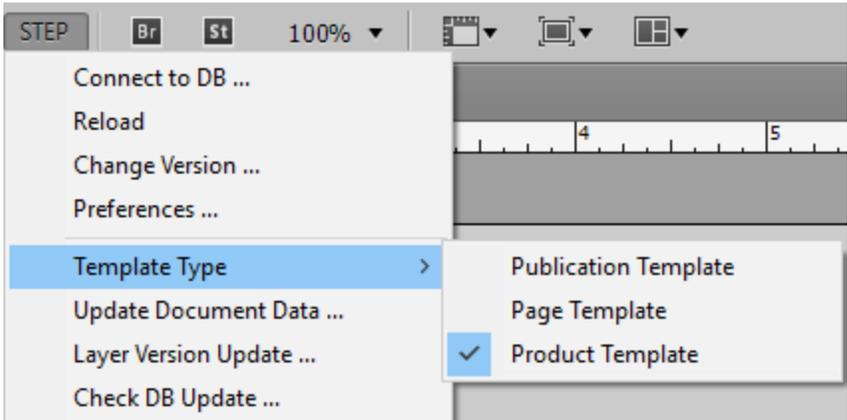
Preferences

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



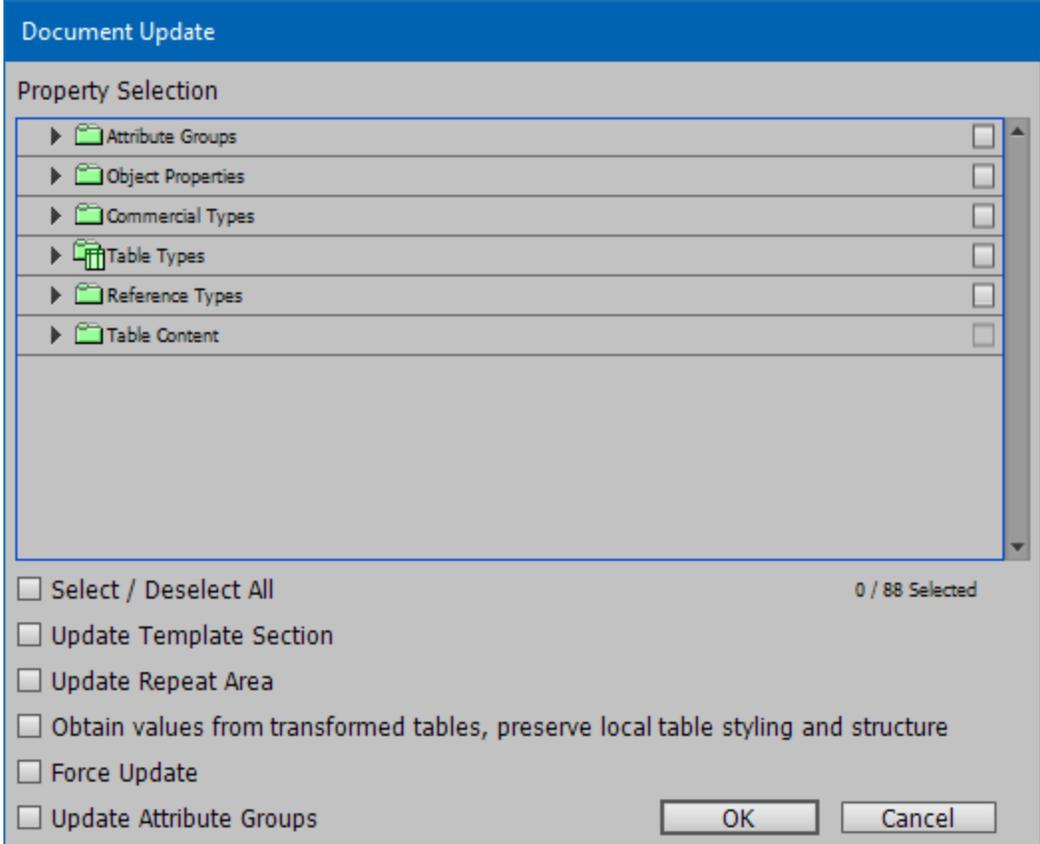
Template Type

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



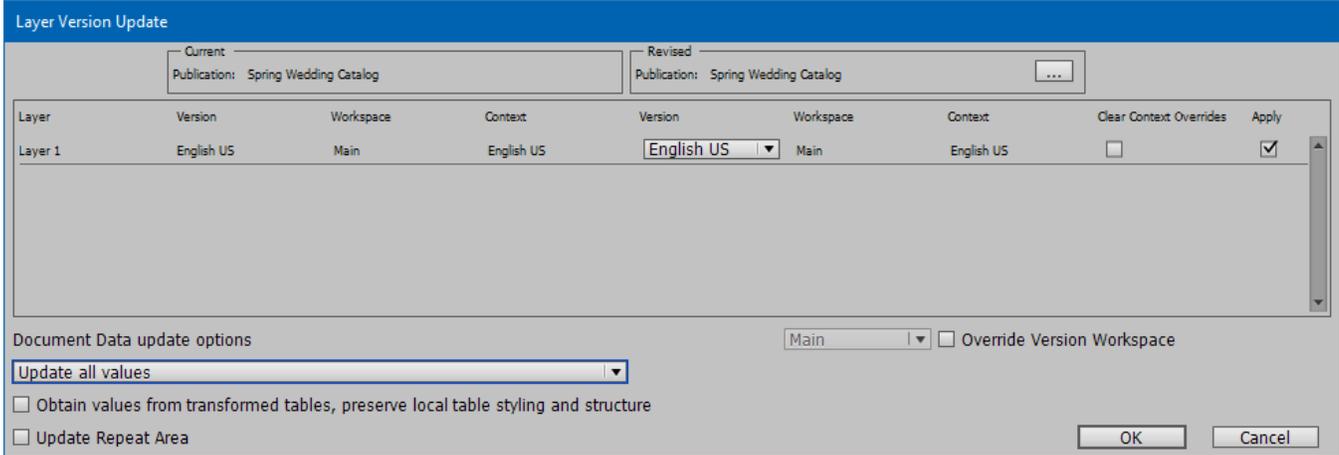
Update Document Data

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



Layer Version Update

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



Check DB Update

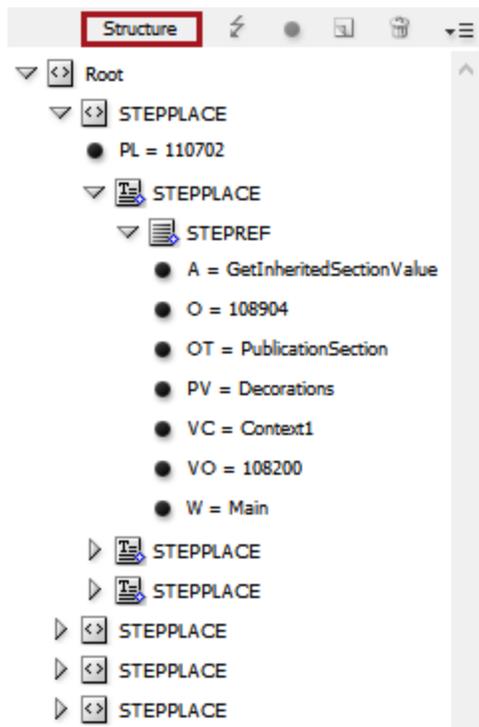
Use this command to check the page against the STEP database and list all the cases where a newer version of the data exists in STEP. For more information, see the **Updating Documents From InDesign** topic.

Relink Assets

See the **Relinking Assets in STEP'n'design** topic for information on this functionality.

Cleanup Mount Tags

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



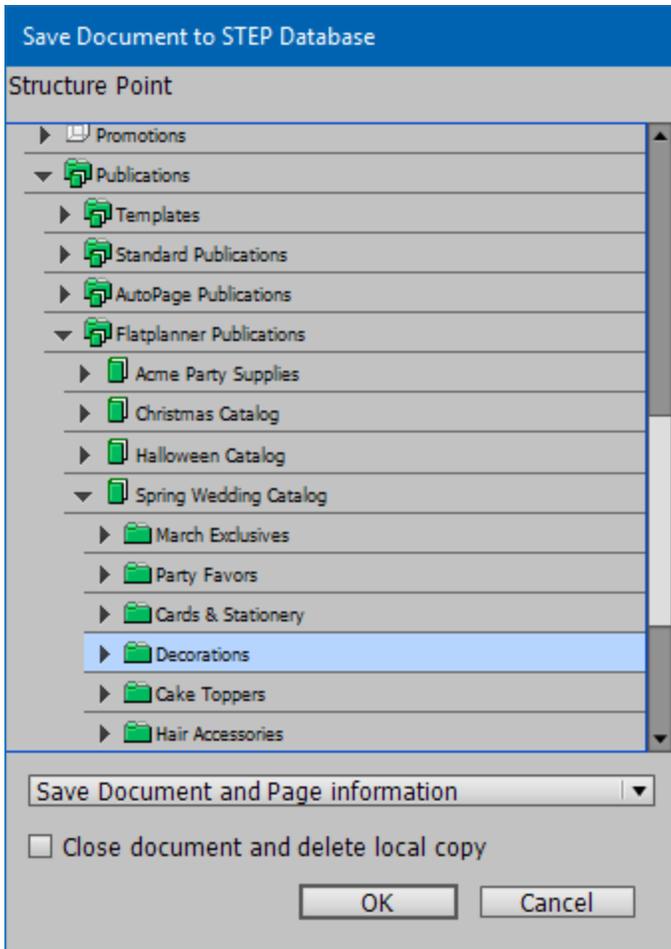
For more information, see the **Mounting Products** topic.

Table Settings

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

Save Document to DB

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



Writeback to DB

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

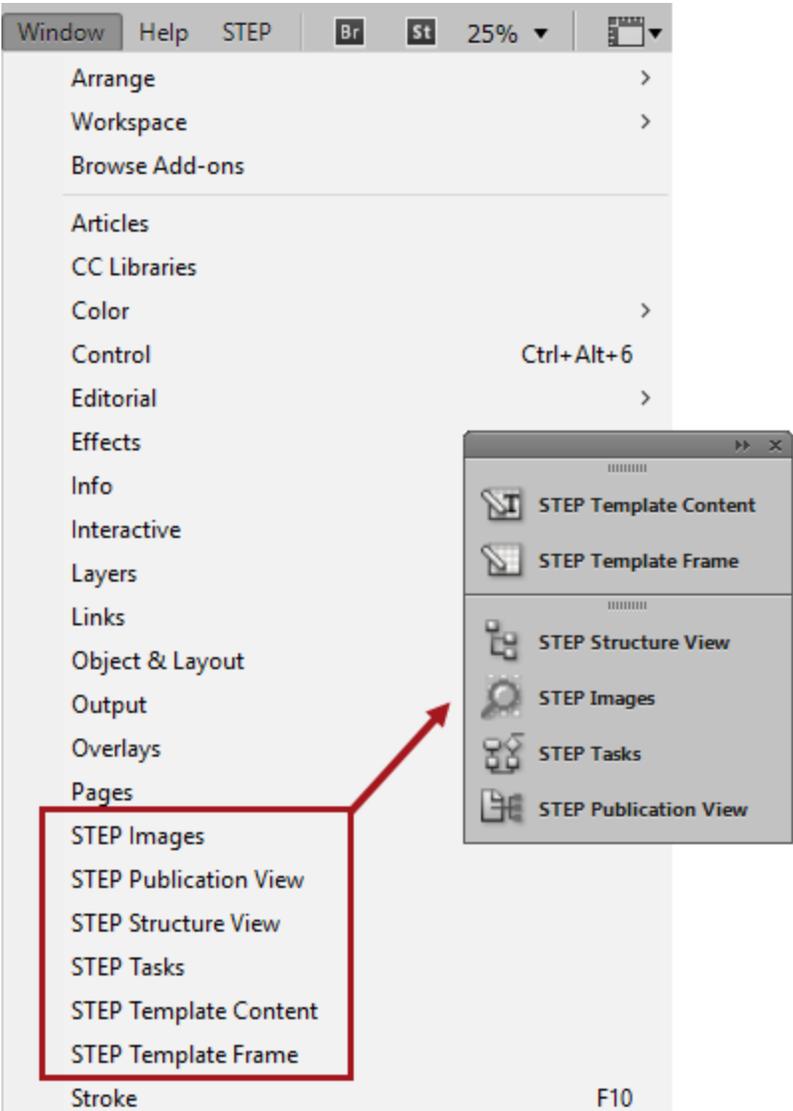
For more information, see the **Writing Data Back to STEP** topic.

Dump Document Data

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

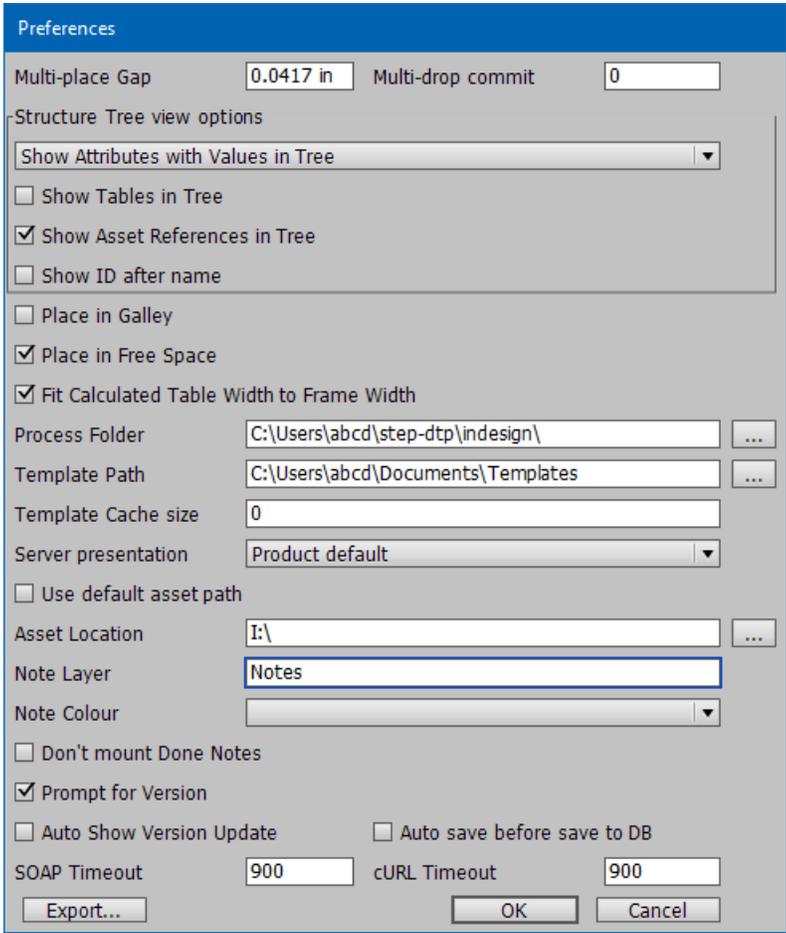
STEP Palettes

The STEP palettes / panels are accessed from the **Window** menu on the application bar across the top of the InDesign interface. For more information, see **STEP Palettes in InDesign**.

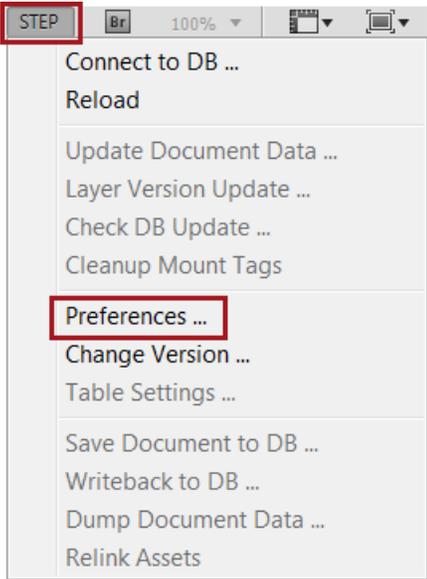


Configuring the STEP Preferences Menu

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



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

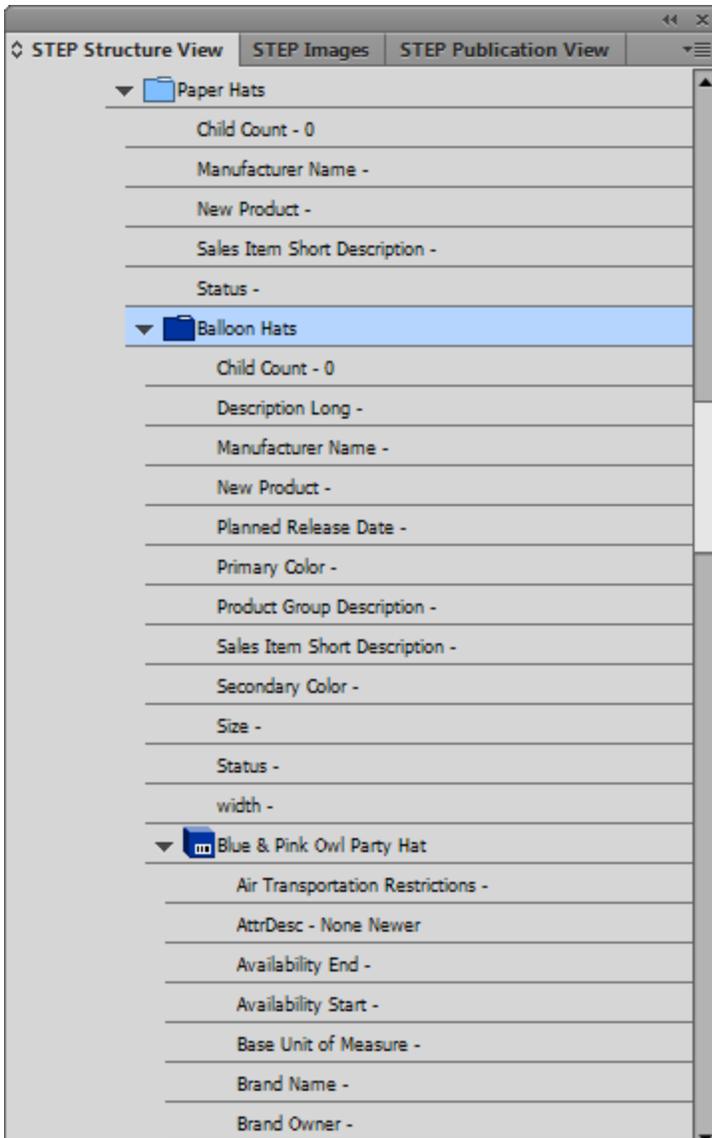


The following list describes the settings contained within the Preferences menu:

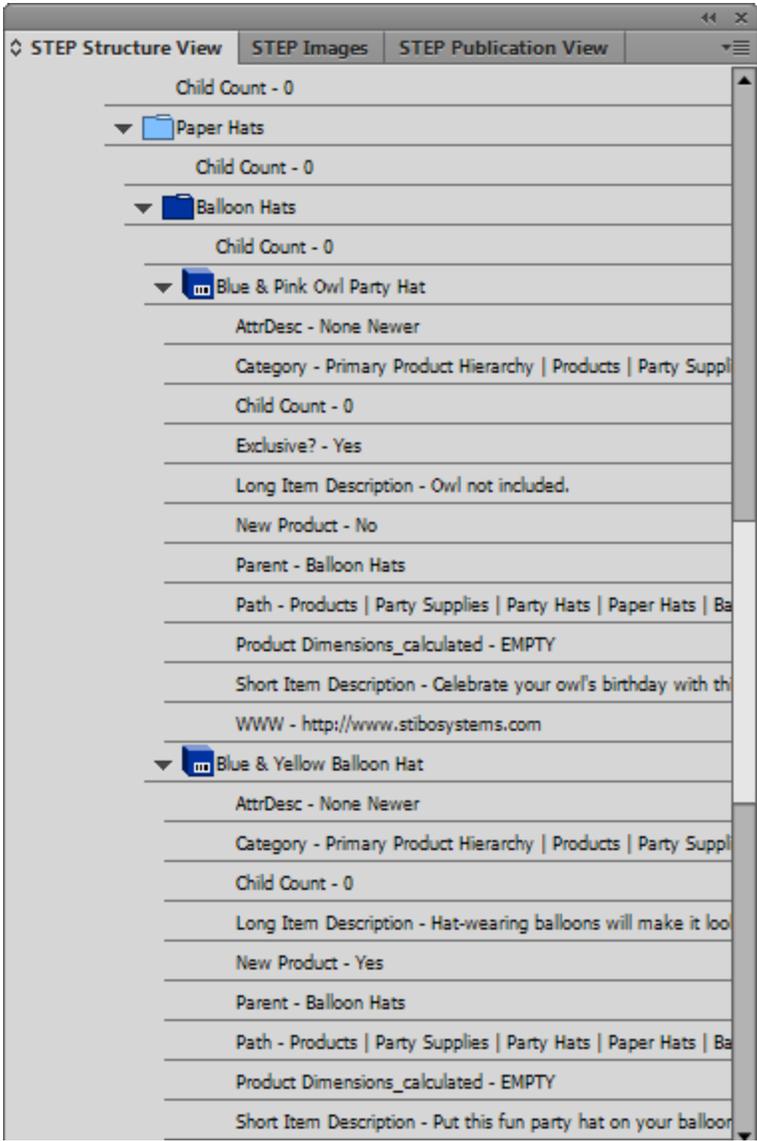
- **Multi-place Gap:** The distance added here is the distance that STEP'n'design will add between objects when mounting multiple objects in the same drag and drop operation.
- **Multi drop commit:** The number added here is the frequency of mount that should take place before a commit is made, when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

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

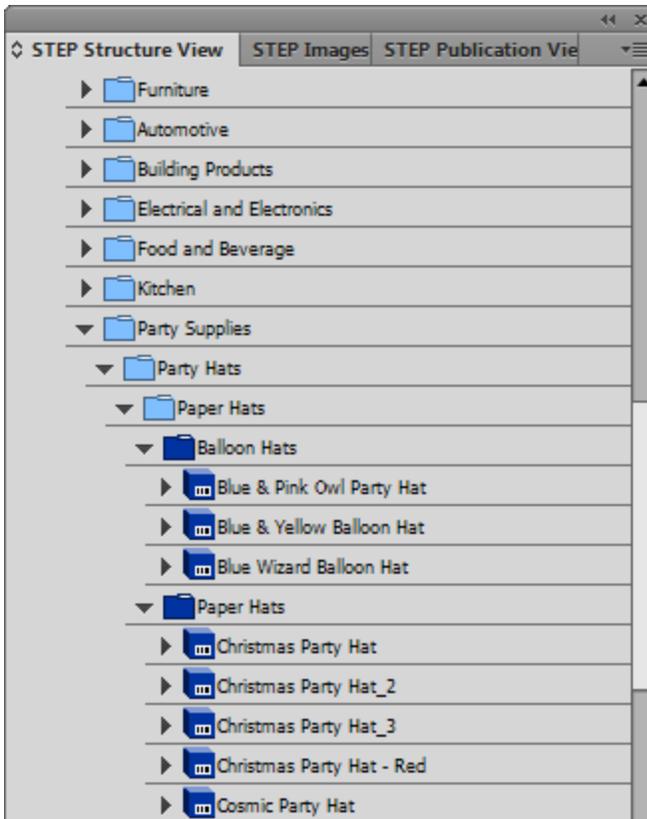
- **Structure Tree view options:** Controls the visibility of attributes when viewing objects in the **STEP Structure View** panel. Options are **Show all Attributes in Tree**, **Show Attributes with Values in Tree**, and **Don't show Attributes in Tree**. Showing attributes makes them available for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



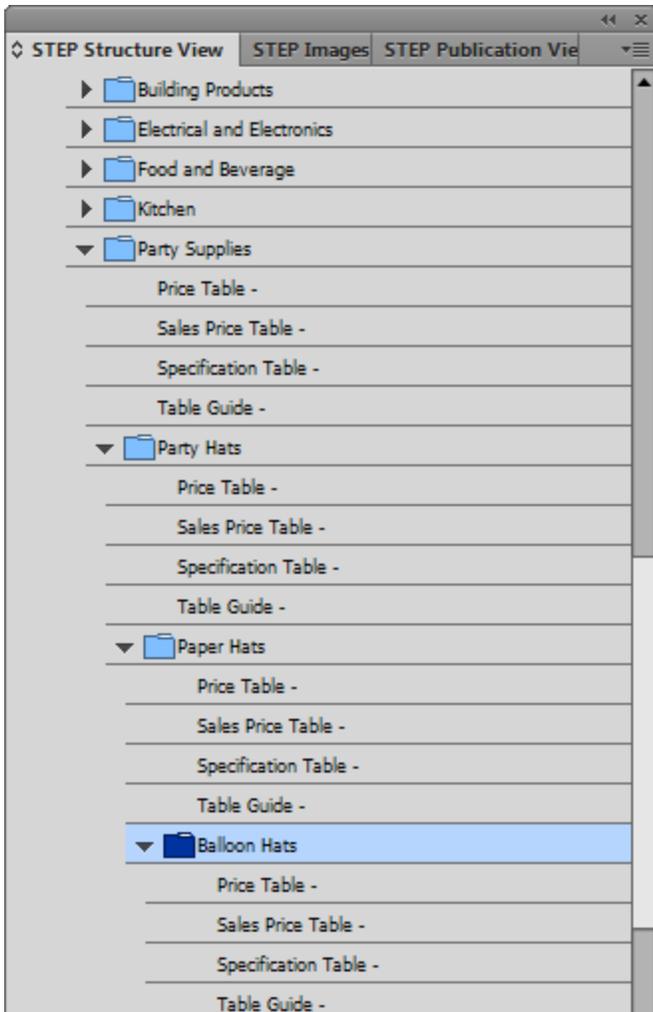
- This screenshot shows a sample STEP Structure View with **Show Attributes with Values in Tree** selected. This option reduces the number of attributes displayed in the tree, making it easier to locate the relevant attributes for mounting.



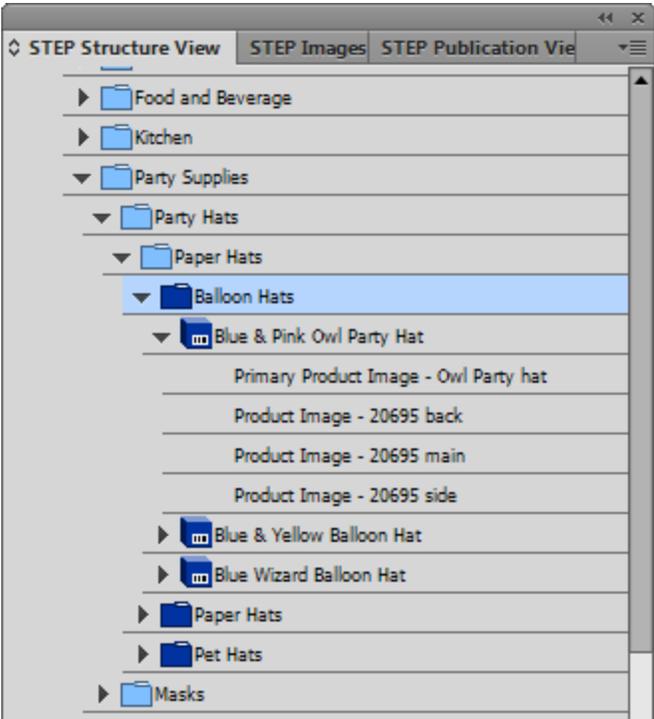
- This screenshot shows a sample STEP Structure View with **Don't show Attributes in Tree** selected.



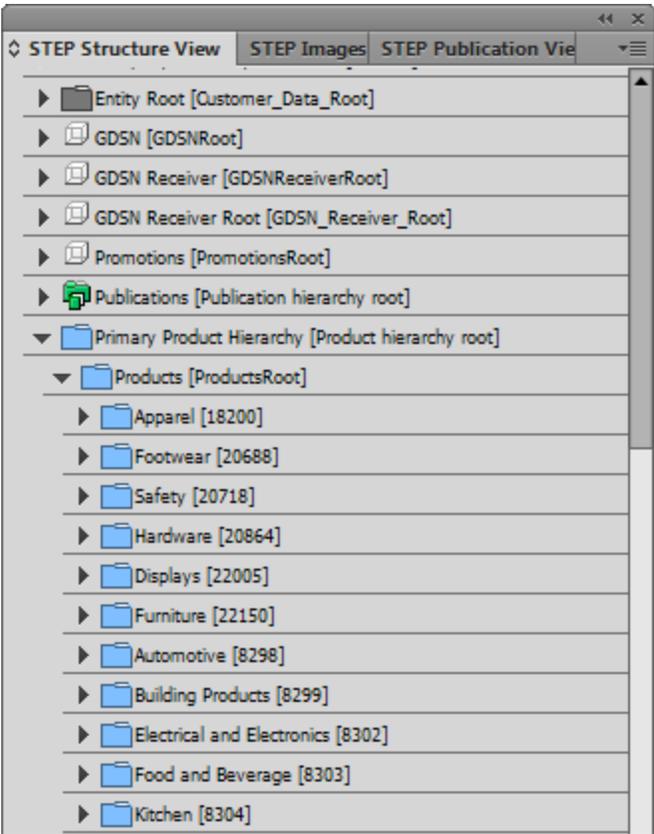
- **Show Tables in Tree:** Check this box to display the tables that are linked to products and classifications in the STEP Structure View panel, thus making them available for page mounting and for converting sample documents into product templates.



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



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



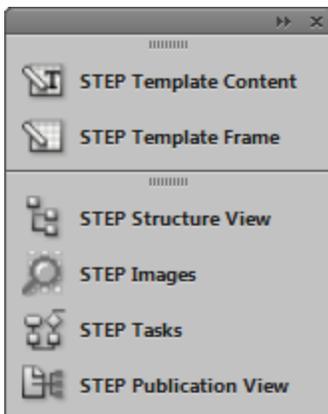
- **Place in Galley:** Selecting this check box indicates that mounting using a product template (and not using STEP Flatplanner) should be performed into a text galley. For more information, see the **Mounting Products** section of the **STEP'n'design** documentation.
- **Place in Free Space:** Check this box to make STEP'n'design place your element in the first available free space on the page when you drag and drop it onto the publication template or mounting page. If not selected, the object will be placed in the specific location where you drop it.
- **Fit Calculated Table Width to Frame Width:** Check this box to adjust the width of calculated table columns (starting with the widest column) until the width is identical to the width of the frame if a table width is not defined in STEP.
- **Process Folder:** This is the path in the directory structure in which STEP'n'design stores information. This folder may contain a number of items: inSTEPLogOptions.xml to control logging and sub-folders for logs (default destination for logging), tmp (where any temporary files are stored), comms (where communications trace information is stored for diagnostic), and scripts (JavaScript event handler[s], when applicable). The system will use the default path (C:\Users\[User_Name]\step-dtp\indesign\) if not set by the user.
- **Template Path:** This is the path to the folder / directory where your product templates are stored.
- **Template Cache size:** Increases performance when working with templates saved in STEP. Size is defined in MB and a setting of 2 to 5 MB is normally suitable for most users.
- **Server Presentation:** Defines which product template should be used for mounting objects. Choose **None** to use the product template specified in the **STEP Structure View** panel. Choose **Product default** to use the default product template assigned to the object in STEP. Choose **Publication rules** to use the product template(s) specified by the Object Layout pagination rules specified in STEP.
- **Use Default Asset Path:** If checked, a default Asset Push path will be used to mount images. A default asset path is typically configured by Stibo. Do not check if an Asset Location is specified in the Asset Location field.
- **Asset Location:** If a system has been set up to use Asset Push, then a path to the location of the hi-res images is specified here. This field should be left empty if your system has not been set up to use Asset Push. See the **Linking to an Asset Location** topic for more information.
- **Note Layer:** *(Only relevant for Flatplanner)* Type the name of the layer in which the Notes from the Flatplanner should be shown.
- **Note Colour:** *(Only relevant for Flatplanner)* Select a background shading color for Flatplanner Notes when mounted on the InDesign page.
- **Don't mount Done Notes:** *(Only relevant for Flatplanner)* Check this box to prevent any Flatplanner Notes marked 'Done' from mounting on the InDesign page.
- **Prompt for Version:** Check this box to have STEP'n'design prompt you to select a publication version every time you mount an object onto a page.
- **Auto Show Version Update:** Check this box to automatically show the **Change Version** dialog box whenever your version has been redefined in STEP (e.g., if the workspace on a version has been changed from Main to Approved).

- **Auto Save before save to DB:** Check this box to automatically save your documents (templates and actual pages) locally before saving them to STEP. Since documents must be saved locally anyway before they can be saved to STEP, checking this box will eliminate the clicks needed to save the documents manually.
- **SOAP Timeout:** Enter a configurable timeout for SOAP (Simple Object Access Protocol) operations in order to improve performance on slow systems. Default is 900 seconds (15 minutes).
- **cURL Timeout:** Enter a configurable timeout for cURL operations in order to improve performance on slow systems. Default is 900 seconds (15 minutes).
- **Export:** Click this button to save your STEP'n'design preferences into a text file. This file can be used by Stibo support personnel to help troubleshoot issues.

STEP Palettes in InDesign

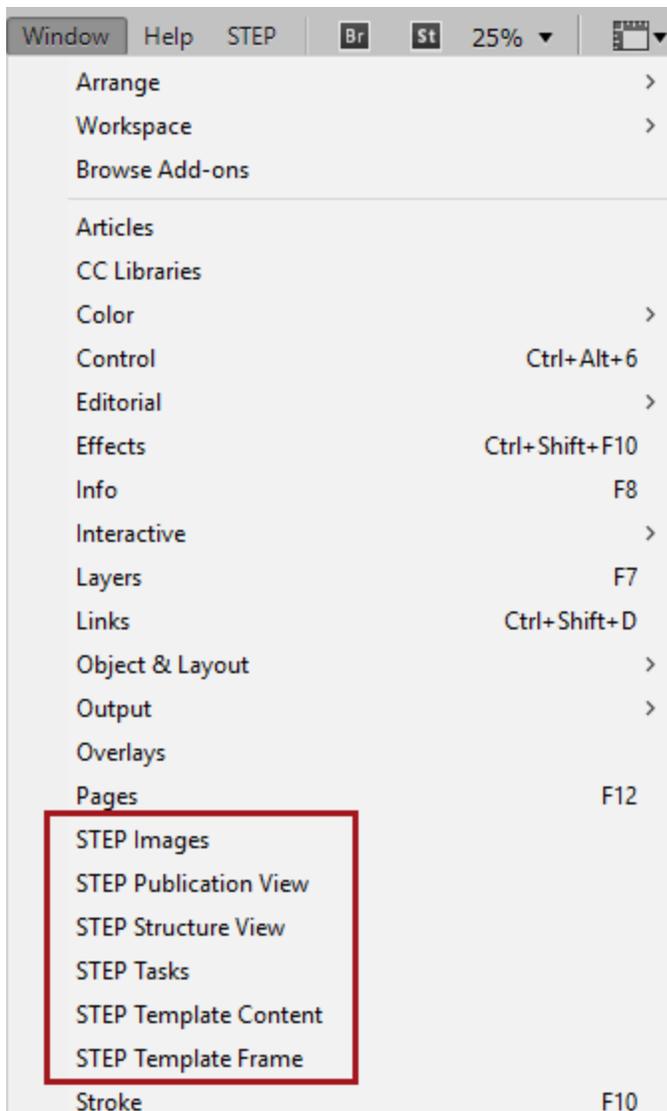
The **STEP Palettes** are used for actual mounting of STEP data, including template composition and image mounting. Six InDesign palettes (also known as **panels** in InDesign terminology) are used with STEP'n'design:

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



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

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

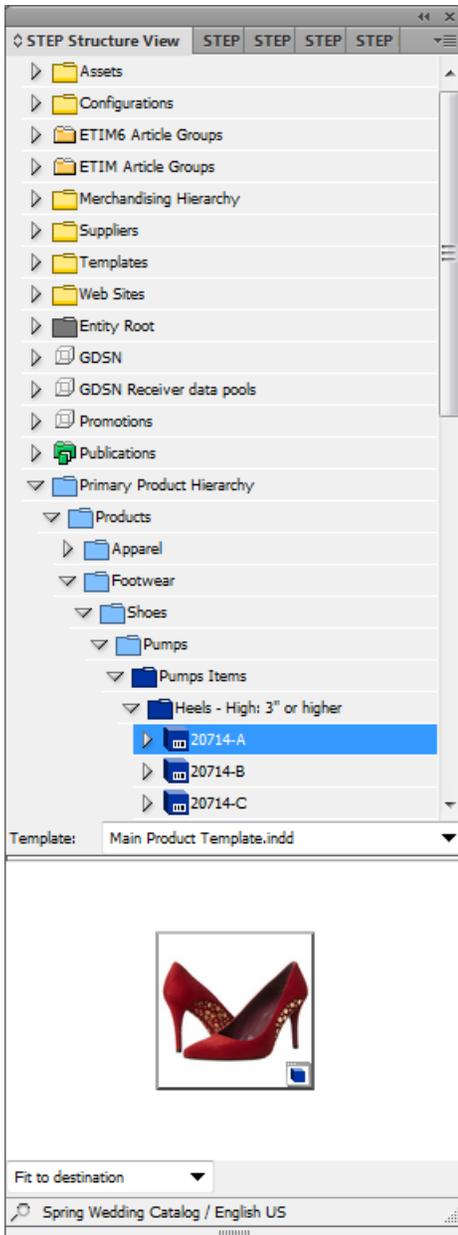


STEP Structure View

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

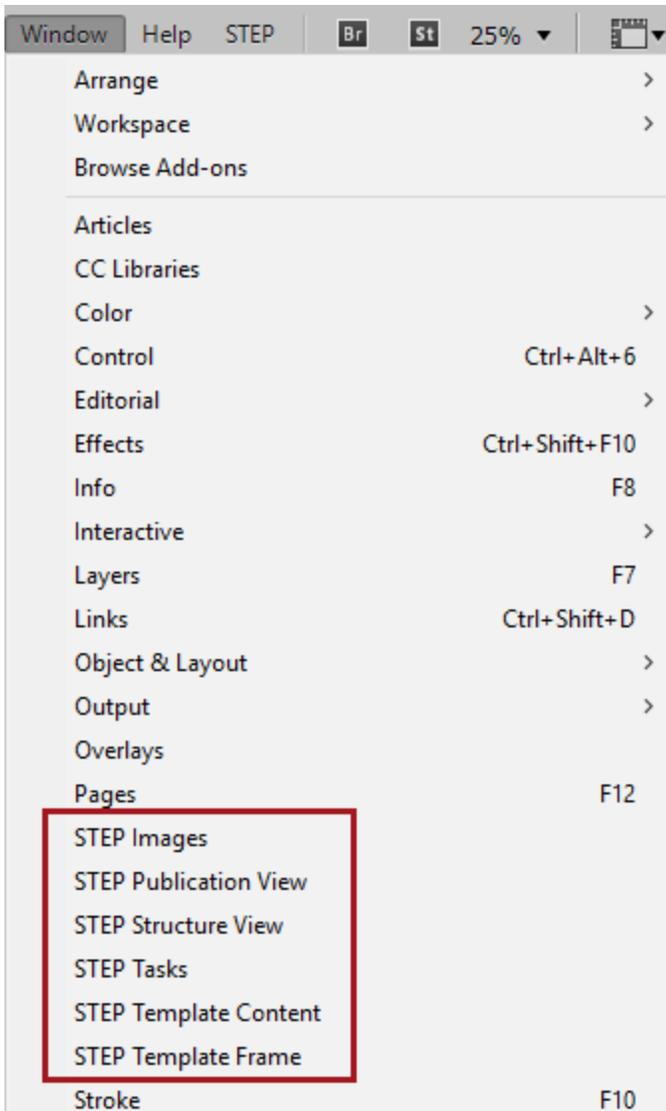
The STEP Structure View is essentially a mirror of the Tree in the workbench. It allows InDesign (DTP) users to access contents of the workbench from within InDesign without having to log into the workbench.

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



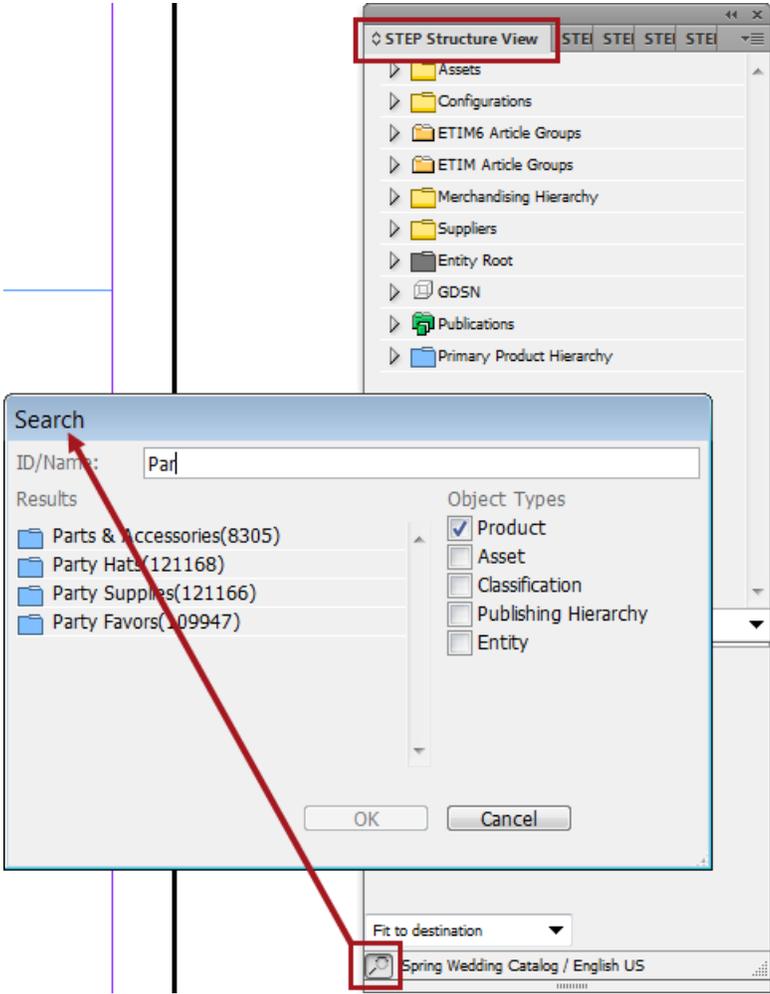
Accessing the STEP Structure View

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



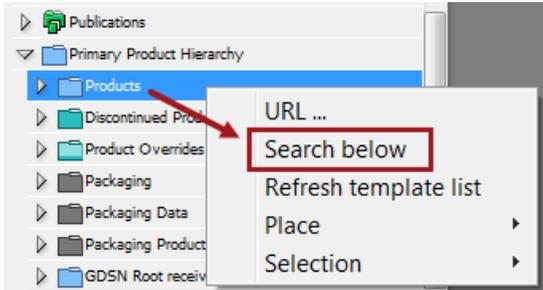
Navigation and Search in the STEP Structure View

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



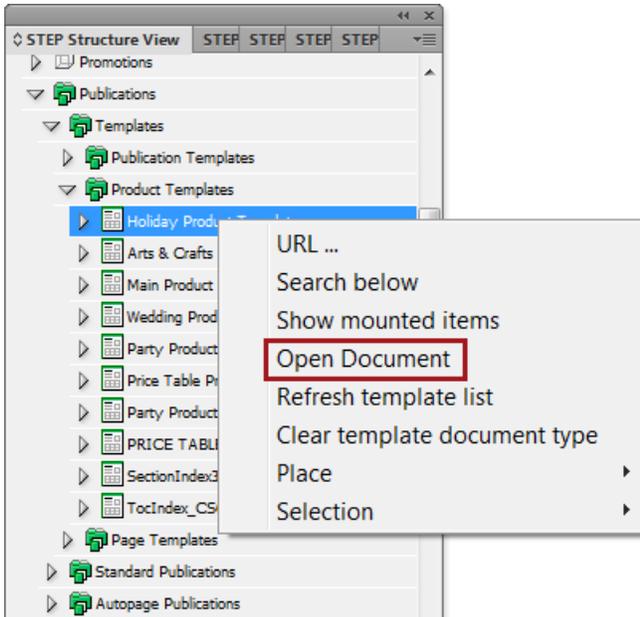
The **Search** dialog enables typeahead and filtered searches in the STEP Structure View. Searches are performed by **Name** or **ID**. Searches may be filtered by one or more of the following object types: Product, Asset, Classification, Publishing hierarchy, and Entity. Search is not enabled unless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

Searches in the STEP Structure View may also be limited to a specific level (node) of a hierarchy by using the **Search below** option. **Search below** is accessed through a right-click action on the chosen node. Note that there is a three-character limit before typeahead search results will populate using **Search below**.

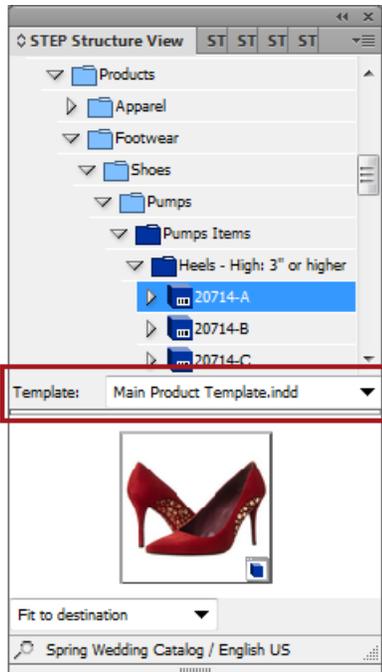


Additional Features of the STEP Structure View Panel

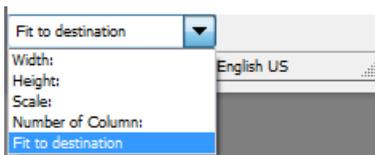
- Publication Hierarchy:** Templates and actual pages that have been saved back to STEP can be opened for editing from the Publication hierarchy. To open a template or actual page, right-click on the document and select **Open Document** from the menu.



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



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

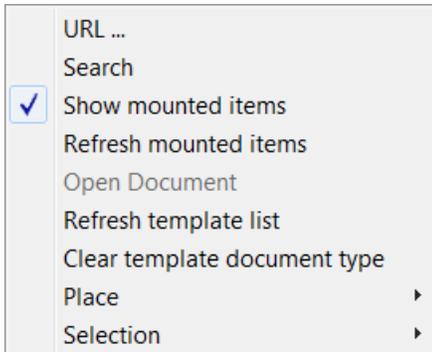


- **Width:** Sets the width of the text or image frame when dragging an attribute or asset reference directly onto a page (not into an existing frame)
- **Height:** Sets the height of the text or image frame when dragging an attribute or asset reference directly onto a page (not into an existing frame)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

- **Fit to destination:** Causes an image reference to scale (up or down) to fit the existing frame that it is dragged into
- **Status bar:** Displays the name and version of the publication you are currently working with. For example, 'Spring Wedding Catalog / English US'

Options Menu

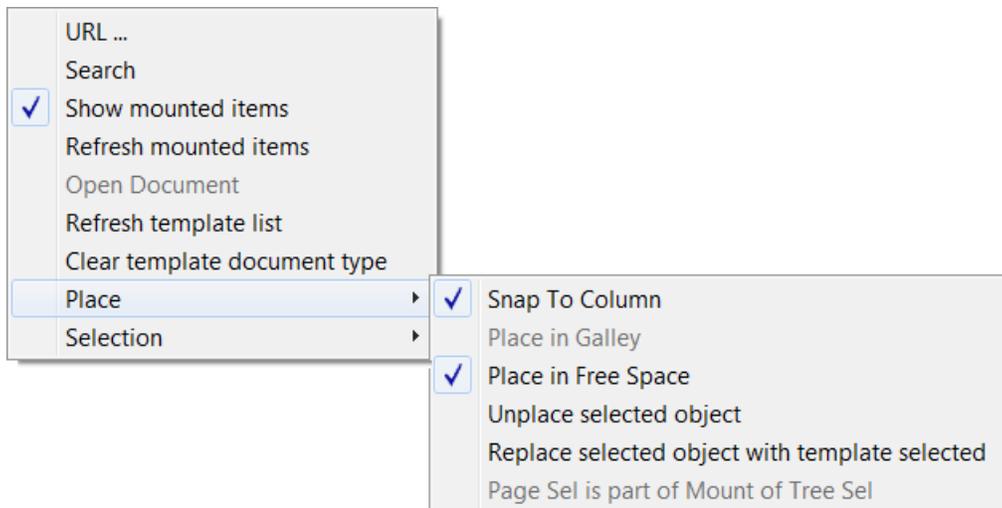
The **Options** menu in the STEP Structure View is accessed by clicking in the dropdown arrow in the upper right corner of the panel. It contains the following commands:



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

Place Options

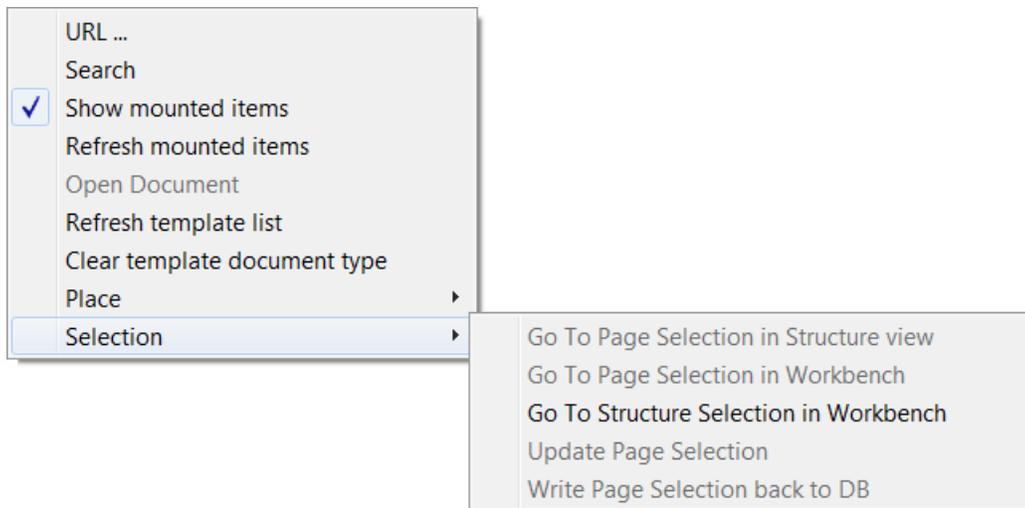
The options available in the **Place** sub-menu enable you to set a range of parameters for the mounting process, as follows. These options are also available in a menu that appears when right-clicking on a selected object in the STEP Structure View palette tree.



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

Selection Options

The options available in the **Selection** sub-menu enable you to perform a range of operations on the element that you have selected on your InDesign page, as follows:



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

STEP Template Palettes

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

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

STEP Template Content

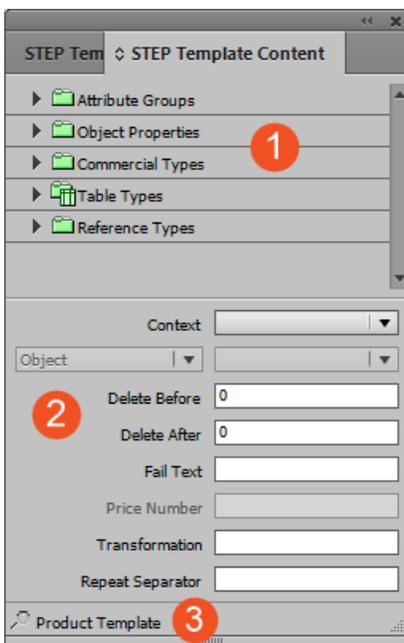
The **STEP Template Content** palette (or *panel*, in InDesign terminology) is used primarily when creating **product templates** in InDesign. The STEP Template Content palette is where elements from STEP—including attributes, asset references, and tables—are linked to frames on InDesign pages in order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

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

Sections of the STEP Template Content Palette

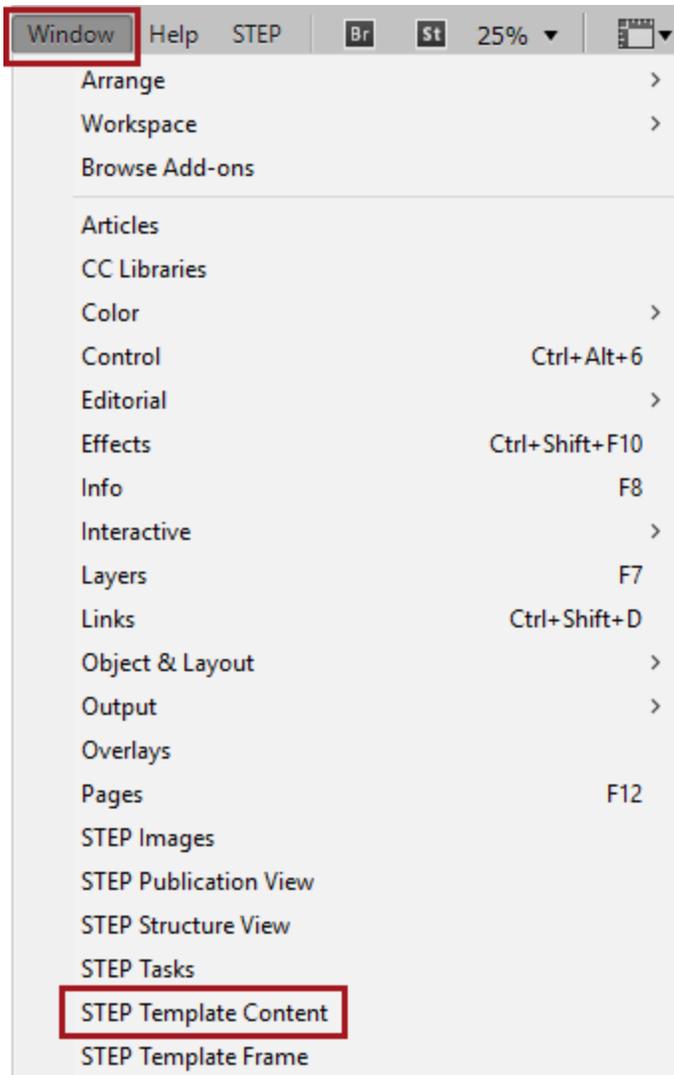
The STEP Template Content palette is composed of three panel divisions.

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



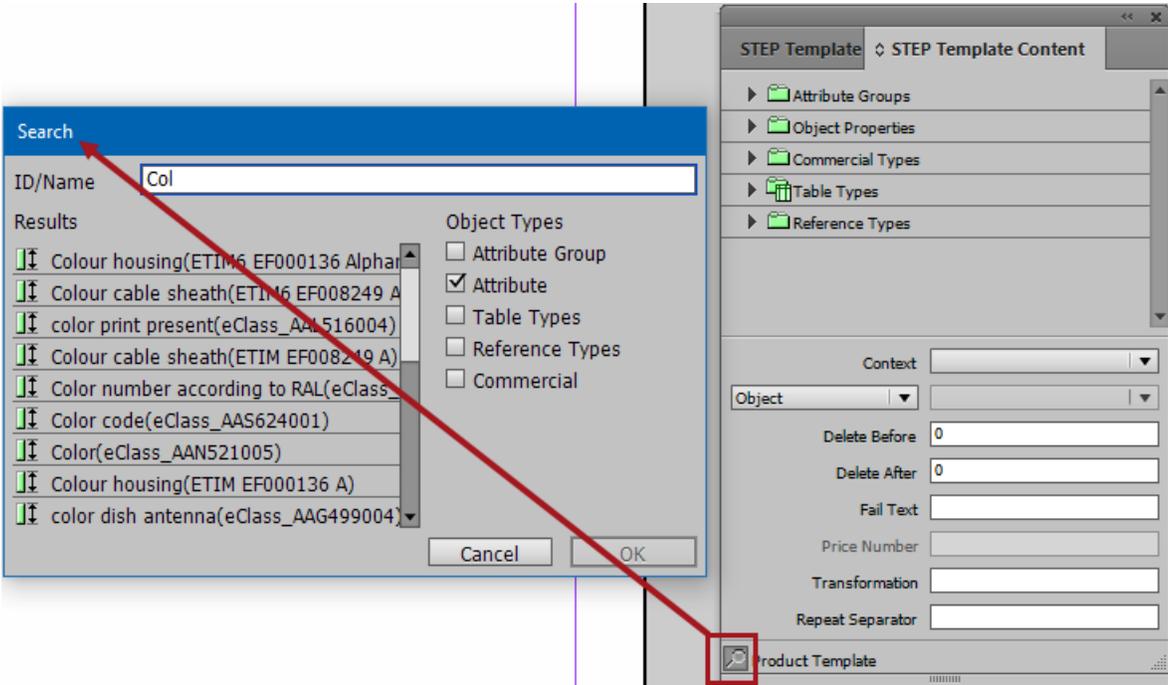
Accessing the STEP Template Content Palette

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



Navigation and Search in the STEP Template Content Palette

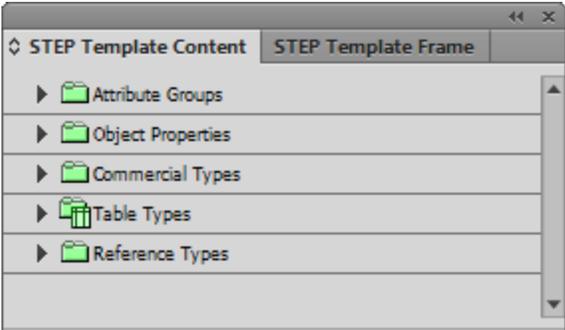
The STEP Template Content palette can be navigated by browsing or searching. To **browse**, hierarchies may be expanded and collapsed by clicking on the arrow signs to the left of the hierarchy levels. To **search**, click on the magnifying glass search icon in the lower left corner of the panel to display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



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

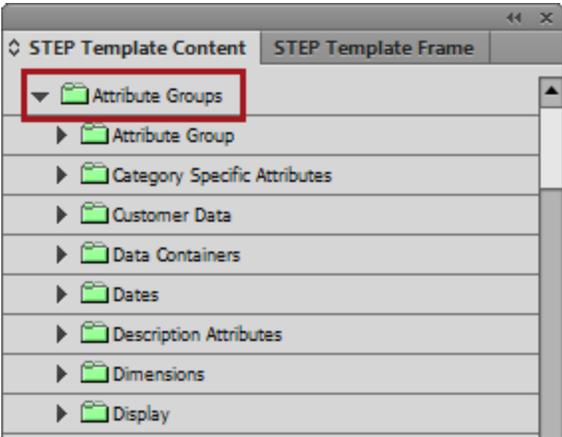
STEP Template Content Palette Tree

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

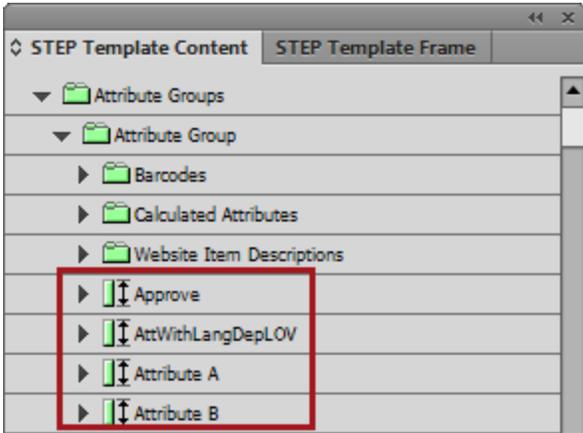


Descriptions of each folder and its contents are as follows:

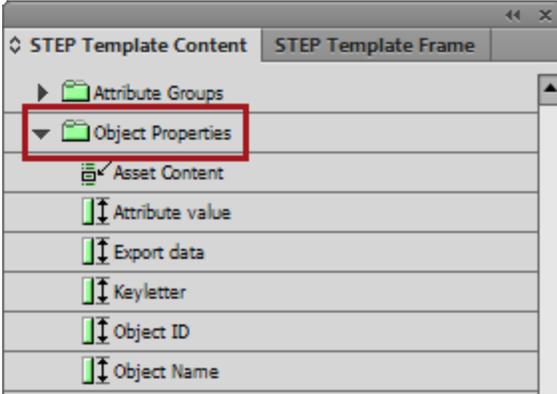
1. **Attribute Groups:** Expand the top-level Attribute Groups folder to see all attribute groups in STEP.



- Expand the attribute folders to access individual attributes.

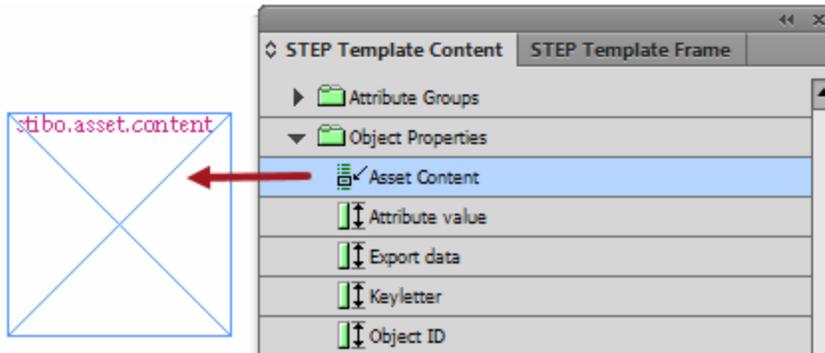


- 2. **Object Properties:** This folder contains non-attribute elements that can be mounted on InDesign pages. Each option is described in the bullet list below.

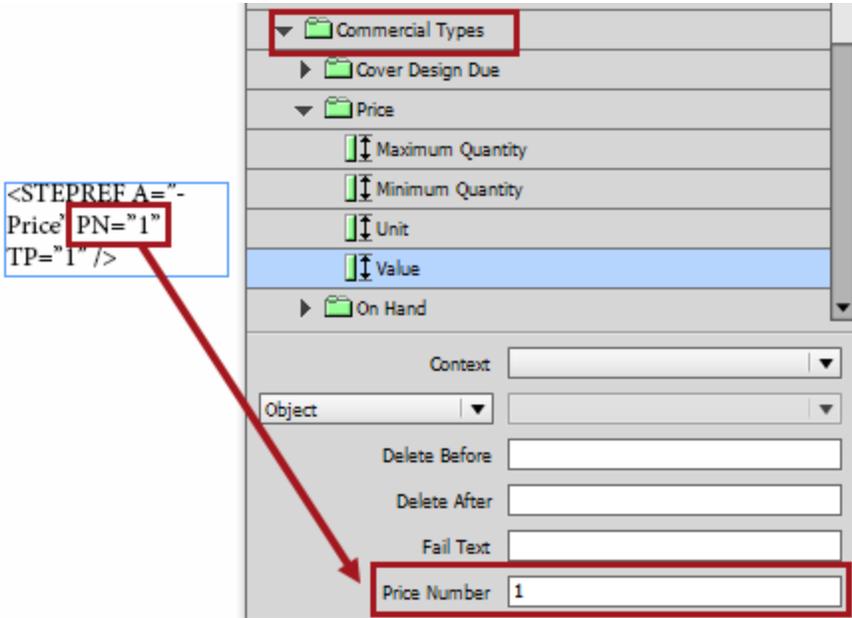


- **Asset Content:** Typically used in conjunction with the 'Data Source' setting (on the STEP Template Frame palette) to mount referenced image assets. Some examples of when this tag (stibo.asset.content) is used

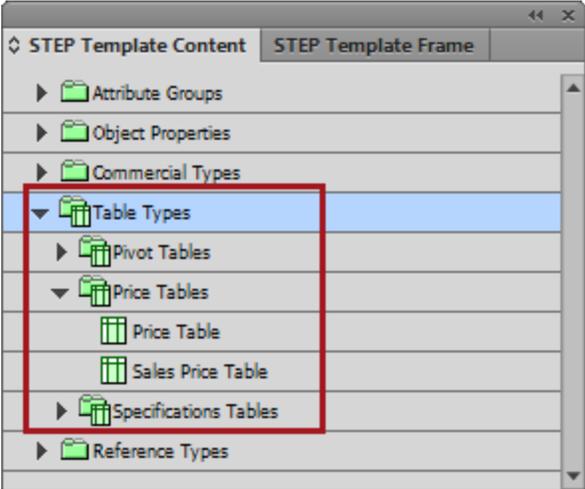
include: an image frame that will display multiple images from a multi-valued asset reference; an image frame that is intended to tile across the page when displaying multiple images; or for image frames that are grouped with text frames to mount image metadata captions. For more information, see the **Sequencing Images in InDesign** topic.



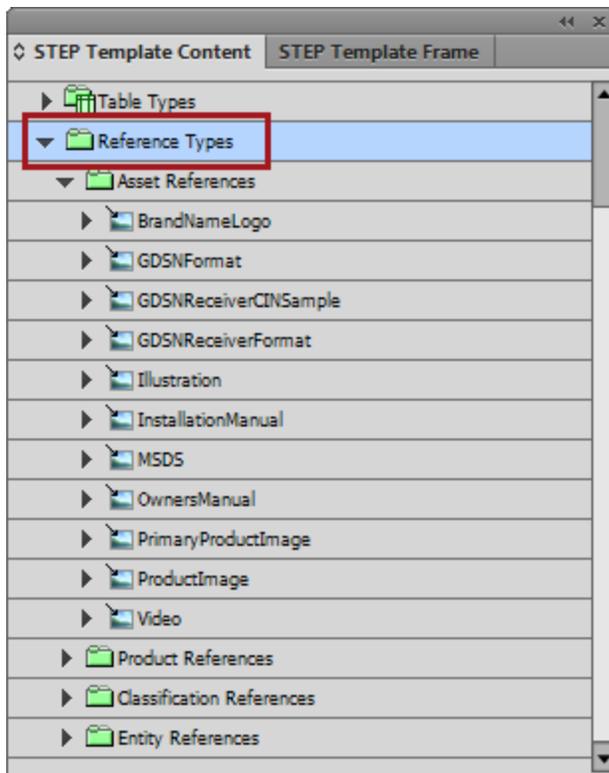
- **Attribute value:** Used when mounting attribute groups.
 - **Export data:** Used on product templates in AutoPage publications to include index mounting as part of the autopagination process.
 - **Keyletter:** Used to create Galley page templates. See the **Galley Templates** section of the **Flatplanner** documentation for more information.
 - **Object ID:** Used to display the STEP ID of the object being mounted.
 - **Object Name:** Used to display the STEP Name of the object being mounted.
3. **Commercial Types:** Used to mount the following information from a selected commercial terms list: Maximum Quantity, Minimum Quantity, Unit, and Value. Note that a Price Number must also be designated in the tag when mounting commercial data.



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



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



STEP Template Content Palette Parameters

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

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

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

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

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

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

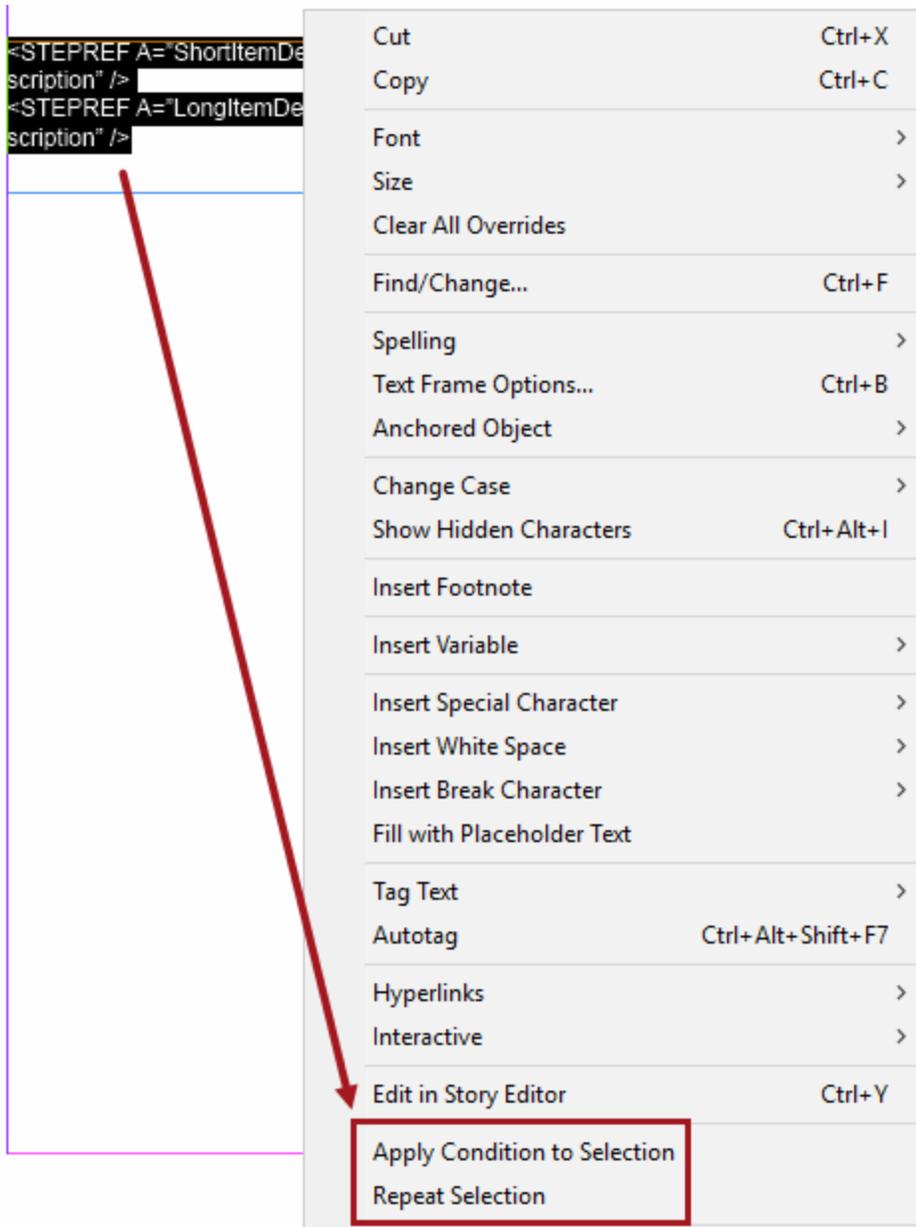
- **Fail Text:** If an attribute does not contain a value for the product you are mounting, you can use this field to insert text that should appear on the page instead of a blank space or frame. This field is typically used for text replacement strings such as 'Not Applicable', 'N/A', 'Call for details',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

The Repeat Separator value is a string, which is set in by STEP'n'design every time a 'Repeat Selection' operation is performed. Often, the repeat separator is used to put in a new line character between the individual attribute rows. In that case, the Repeat Separator is the InDesign character for new line \n.

Available Right-Click Options Inside Text Frames

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

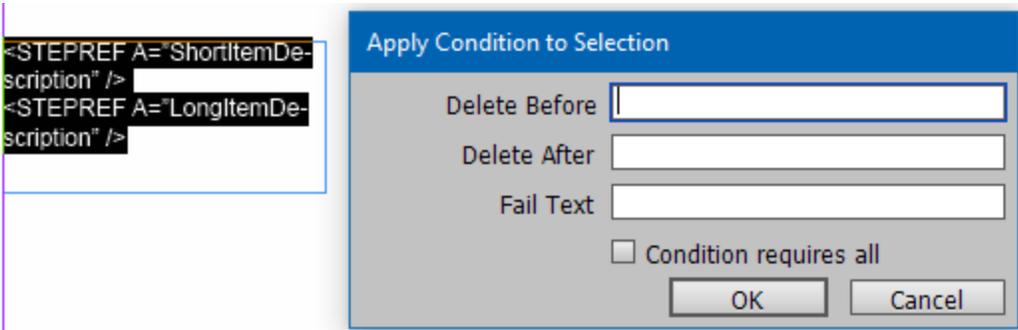
Though the STEP Template Content is not used to access these options, they are detailed in this topic because they involve the setting of parameters on content inside of frames.



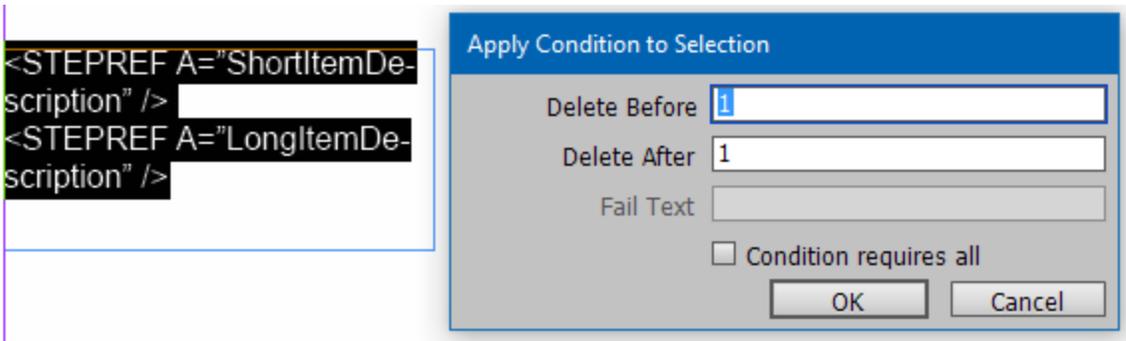
Apply Condition to Selection

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

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



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



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

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

Condition requires all

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

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

Repeat Selection

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

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

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

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

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

The 'Repeat Selection' dialog box contains the following fields and controls:

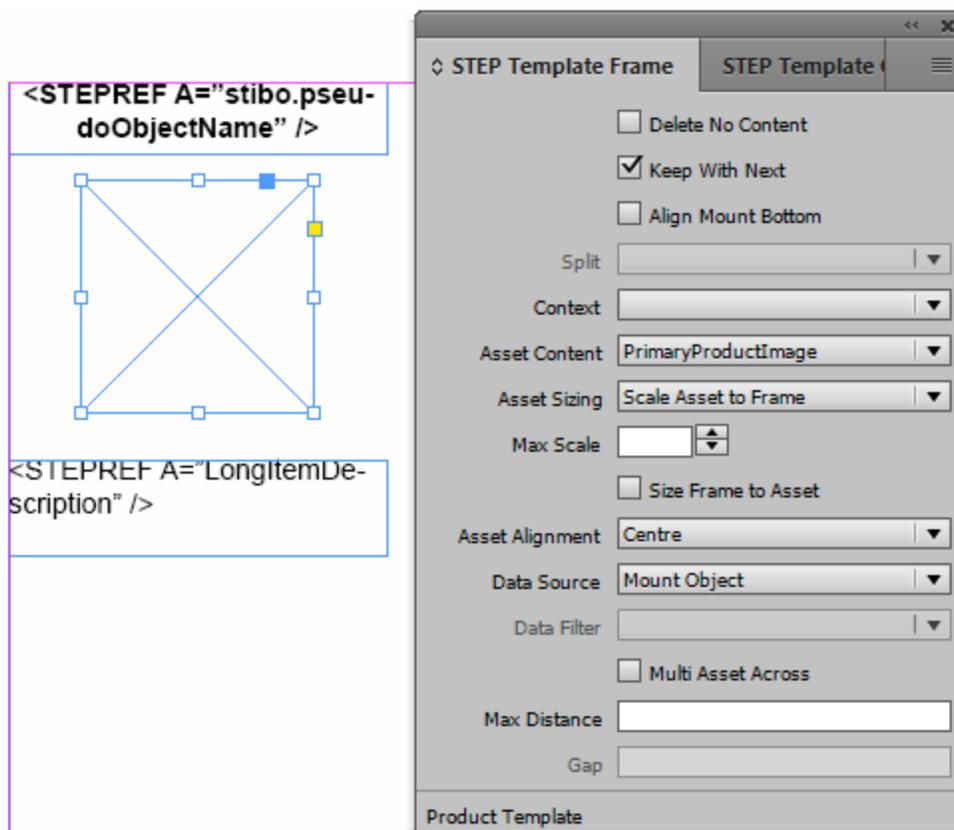
- Delete Before:
- Delete After:
- Fail Text:
- Repeat Separator:
- First Line Style:
- Odd Line Style:
- Even Line Style:
- Odd Last Line Style:
- Even Last Line Style:
- Data Filter:
- OK:
- Cancel:

For more information about the repeat selection option, see the **Using the Repeat Function for Subproducts** section of the **STEP'n'design** documentation.

STEP Template Frame

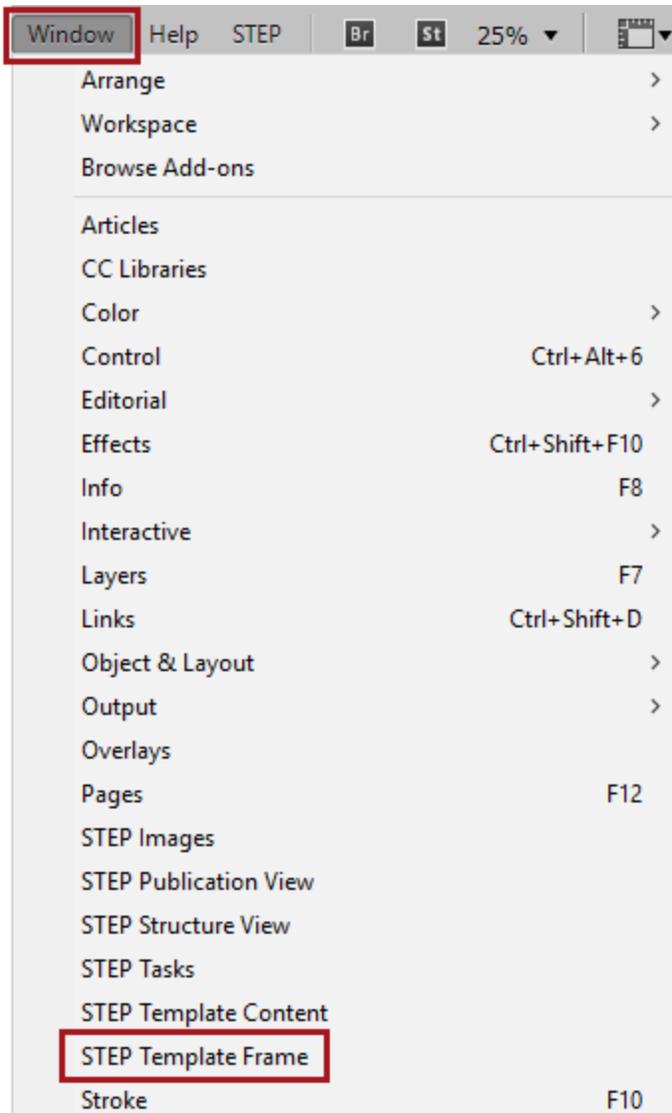
The **STEP Template Frame** palette (or *panel*, in InDesign terminology) is primarily used when creating **product templates** in InDesign. This palette is where settings that apply to entire frames on templates are configured, such as settings to adjust image scaling and text frame height. The STEP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

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



Accessing the STEP Template Frame Palette

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



STEP Template Frame Palette Parameters

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

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

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

Parameters Available for Product Templates

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

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

Parameters Available for Page Templates

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

Parameters Available for Publication Templates

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

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

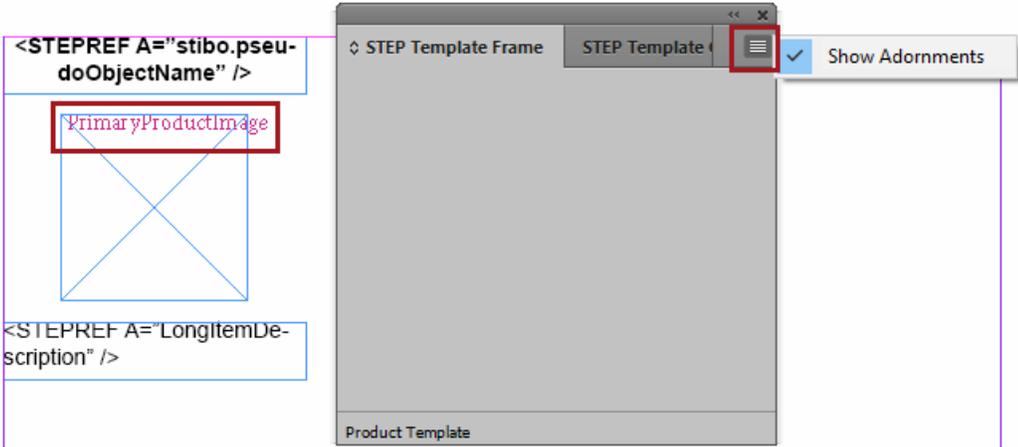
Attribute text frames and image reference frames are configured on publication templates the same way that they are configured for product templates.

For more information about adding Product Continuation Notes to publication templates for AutoPage publications, see the **About Templates in AutoPage** section of the **AutoPage** documentation.

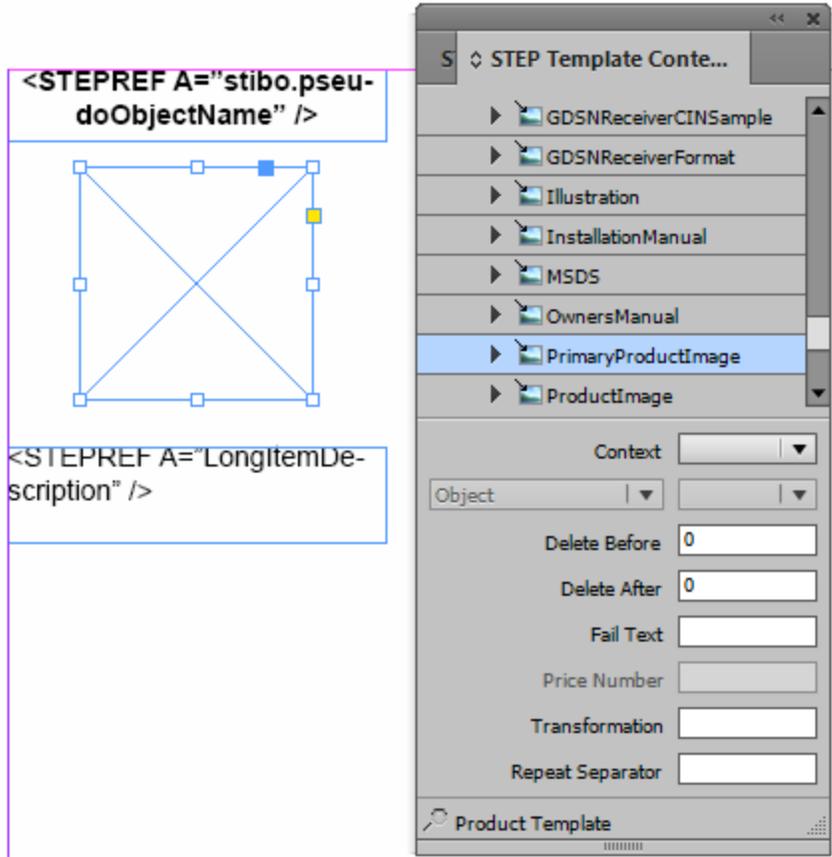
Options Menu

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

Note: The template must be closed and reopened before adornments take effect.

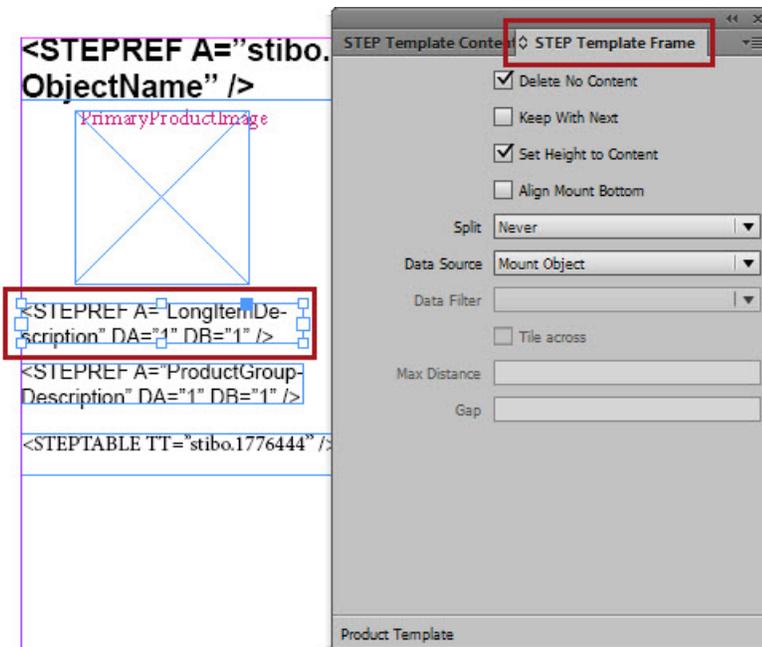


When adornments are not displayed, the asset reference type assigned to a frame can be determined by opening the **STEP Template Content** palette and selecting the frame. The attribute tree will 'jump' to the assigned asset reference type. For more information on the STEP Template Content palette, see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

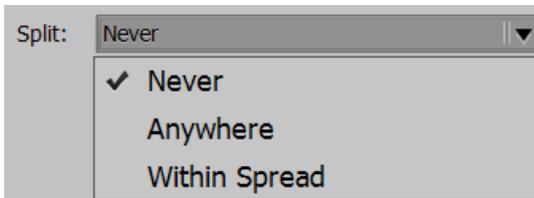


Text Frame Parameters in the STEP Template Frame Palette

Below is a description of the individual parameters available when configuring text frames using the **STEP Template Frame** palette in InDesign.



- **Delete No Content:** This option can be best understood as 'Delete IF No Content.' Check this box to ensure that empty frames do not mount on pages if there is no content in STEP available to populate the text of the attribute(s) linked to the text frames. This setting ignores static text within the frame. If this box is left unchecked, the frame will be mounted, either as empty or with the XML references appearing, depending on the settings placed in 'Delete Before' and 'Delete After' (details on these settings are explained further down in this list).
- **Keep With Next:** When this option is selected, the selected frame will always remain with the frame directly below it.. This setting prevents situations where, for example, the name of a product would be separated from its image if the product mounts at the bottom of the page, and there is only enough room to mount the frame containing the product name. With this box checked, both frames will mount on the following page in order to keep the two frames together. A frame with **Keep With Next** set cannot have a **Split** setting of **Anywhere** or **Within Spread** and vice versa.
- **Set Height to Content:** Check this box if you want STEP'n'design to automatically adjust the height of your text frame if the text or table content is too lengthy to fit in the frame at its original size.
- **Align mount bottom:** Select this to ensure that a text frame will always mount at the bottom of the page. In Flatplanner, the frame will align to the bottom of the Flatplan frame. If more than one frame is designated to align mount bottom, the lowermost frame will align to the bottom and the other frame(s) will mount above it, separated by the same gap amount as on the product template.
- **Split:** This option applies to both individual and repeating (tiling) text frames. Three split options are available: **Never**, **Anywhere**, and **Within Spread**.



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

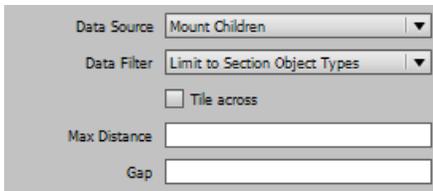
- Select **Never** to prevent the text box from ever splitting across a column or a page.
- Select **Anywhere** to allow the text box to split across columns and pages even if the split results in the creation of a new spread. I.e., the text box will be permitted to split from a right-hand page onto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

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

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

- Select **Never** to prevent the series of repeating text frames from splitting across a column or page if there are too many frames to fit in one column or on one page.
- Select **Anywhere** to allow the series of repeated frames to split across a column or onto another page, even if the split continues from a right-hand page to a left-hand page, creating a new spread.
- Checking **Within Spread** to limit the repeated frames to continue from a left-hand page to a right-hand page only, disabling the ability to create a new spread.
- **Data source:** This controls whether the frame should mount content from the object that is being mounted (**Mount Object**; most common), from children of the mounted object (**Mount Children**), or from an asset or product linked to the mounted object by a reference type. By default, the data source is **Mount Object**, which extracts values from the mounted object only.

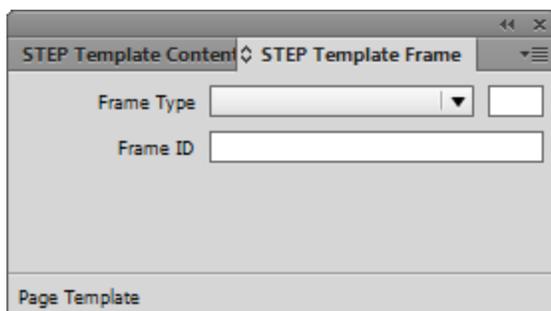
Select **Mount Children** or an **asset / product reference type** when the text frame is intended to repeat on the page. The text frame repeats in instances where information is available from multiple child objects or from multiple referenced products or assets. When Mount Children or an asset / product reference type is selected, the following options are activated in the STEP Template Frame palette: **Tile across**, **Max Distance**, and **Gap**. If Mount Children is selected, the **Data Filter** option is also activated.



- **Data Filter:** Only one option is available—'Limit to Section Object Types'. Choose this when using the STEP REPEAT function to mount metadata attributes and/or other information from child section / subsection objects when mounting publication or section objects. This functionality is typically used in AutoPage publications to create tables of contents / section indexes. See the **Creating a Table of Contents Product Template** topic for more information.
- **Tile across:** Check this box if repeated frames should be tiled horizontally across the page instead of stacking vertically beneath one another.
- **Max Distance:** The maximum distance that horizontally tiled frames should repeat across the page (L-R) before stopping and wrapping back around to begin a new row of repeated frames underneath
- **Gap:** The amount of space to place between repeated frames when tiled horizontally

Text Frame Parameters for InDesign-created Page Templates

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



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

Text Frame Parameters for Publication Templates

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

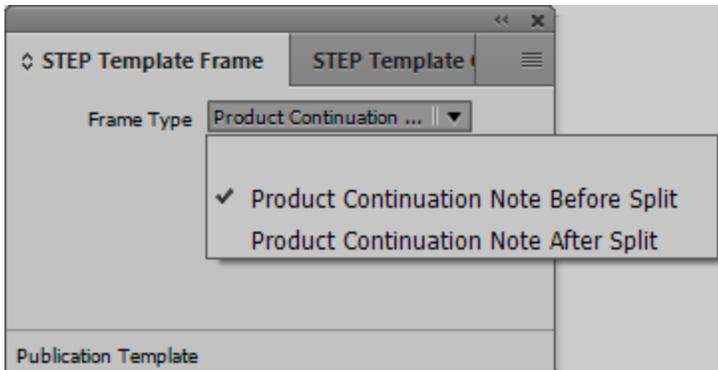
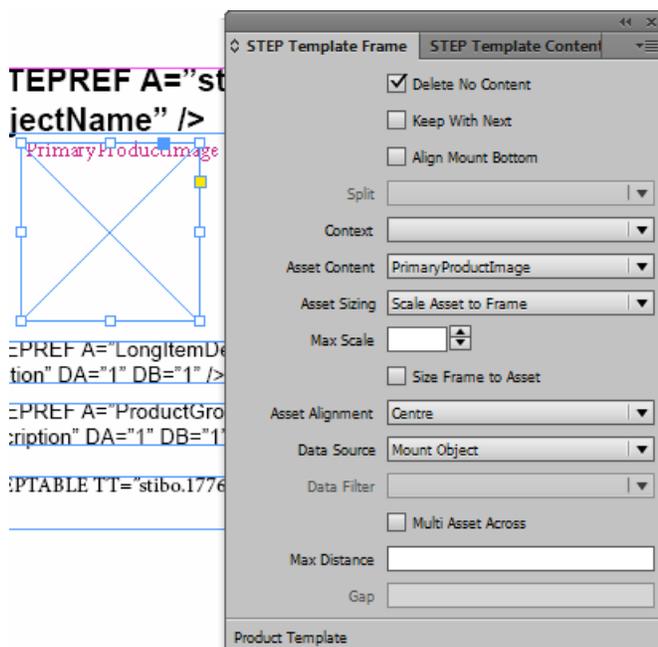


Image Frame Parameters in the STEP Template Frame Palette

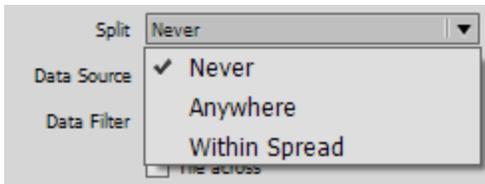
Below is a description of the individual parameters available when configuring image frames on product templates using the **STEP Template Frame** palette in InDesign. For information on the parameters available for page templates and publication templates, see the bottom sections of this topic ('Image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



- **Delete No Content:** This option can be best understood as 'Delete IF No Content.' Check this box to ensure that empty image frames do not mount on pages if there is no image of the asset reference type linked to the mounted product.
- **Keep With Next:** Check this box to ensure that the selected frame remains with the frame that follows it (resides directly below) on the page. This setting prevents situations where, for example, the name of a product would be separated from its image if the product were mounted at the bottom of the page, and there is only enough room to mount the image frame. With this box checked, both the image and the text box below it

containing the product name will mount on the following page in order to keep the elements together. A frame with **Keep With Next** set cannot have a **Split** setting of **Anywhere** or **Within Spread** and vice versa.

- **Align mount bottom:** Select this to ensure that an image frame will always mount at the bottom of the page. In Flatplanner, the frame will align to the bottom of the Flatplan frame. If more than one frame is designated to align mount bottom, the lowermost frame will align to the bottom and the other frame(s) will mount above it, separated by the same gap amount as on the product template.
- **Split:** (For repeating grouped frames) For repeating grouped frames, the three split options are **Never**, **Anywhere**, and **Within Spread**.



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

- **Context:** The Context option allows for the selection of a STEP context from which to select the image. If left empty, the system will mount the image from your version into the page instead. Normally, you will only choose a specific context here if you are building a multi-versioned document and need to determine exactly which context goes into a certain layer version. The quickest and most flexible solution is to leave the context selection empty.
- **Asset Content:** Used to assign an asset reference type to the frame.
- **Asset Sizing:** Dropdown list containing the following options:
 - **Import Asset at Scale:** Image will be scaled according to the **Scale** value entered in the STEP Template Frame palette. By default, the Scale field is blank, meaning that the image will be mounted at actual size unless a percentage below or above 100% is entered.
 - **Scale Asset to Frame:** Image will be scaled proportionally until either width or height fit into the box, unless a **Max Scale** limit is set (see below)
 - **Fit Asset to Frame Width:** Image will be scaled proportionally until the width is identical to the width of the frame, unless a **Max Scale** limit is set (see below)
 - **Fit Asset to Frame Height:** Image will be scaled proportionally until the height is identical to height of the frame, unless a **Max Scale** limit is set (see below)
- **Scale:** Only active when **Import Asset at Scale** is selected. Using this option, images can be scaled with a certain percentage, calculated on the basis of their original scanned size.

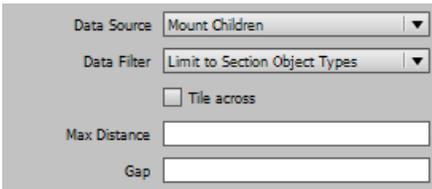
- **Max Scale:** Only active when **Scale Asset to Frame**, **Fit Asset to Frame Width**, or **Fit Asset to Frame Height** are selected. Max Scale can be set from 5% to 500%.

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

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

- **Size Frame to Asset:** Automatically sizes the image frame to match the size of the image(s) linked inside. I.e., if the image mounts smaller than the image frame on the product template, the frame will shrink to fit the size of the image, and vice versa for images that mount at a larger size than the original image frame.
- **Asset Alignment:** Defines whether the images should be aligned left, center, or right within the image frame.
- **Data Source:** This controls whether the frame should mount content from the object that is being mounted (**Mount Object**; most common), from children of the mounted object (**Mount Children**), or from an asset or product reference type. By default, the data source is **Mount Object**, which mounts the object only.

Select **Mount Children** or a product / asset reference type when the image frame is intended to repeat on the page. The image frame repeats in instances where information is available from multiple child objects or from multiple referenced assets. When selected, the following options are activated in the STEP Template Frame palette: **Data Filter**, **Multi Asset Across**, **Max Distance**, **Gap**, and **Split**. (If anything other than 'Mount Object' is selected for Data Source, the checkbox is labeled **Tile Across** instead of Multi Asset Across.)



The screenshot shows a control panel with the following elements:

- Data Source:** A dropdown menu currently set to "Mount Children".
- Data Filter:** A dropdown menu currently set to "Limit to Section Object Types".
- Tile across:** An unchecked checkbox.
- Max Distance:** An empty text input field.
- Gap:** An empty text input field.

- **Data Filter:** Only activated when Data Source is 'Mount Children.' Choose **Limit to Section Object Types** when using the STEP REPEAT function to mount metadata attributes and/or other information from child section objects when mounting publication or section objects. This functionality currently does not exist for images, but the dropdown exists for image frames in the instance that a future customer need may arise.

This functionality is typically used in AutoPage publications to create tables of contents / section indexes. See the **Creating Tables of Contents in AutoPage** section of the **AutoPage** documentation for more information.

- **Multi Asset Across:** Is activated when Data Source is 'Mount Object.' When there are multiple images linked to a single product using the same asset reference type, this setting allows multiple images to be placed inside a single frame and tiled horizontally. If not selected, the images will be mounted vertically.

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

Image Frame Parameters for InDesign-created Page Templates

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

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

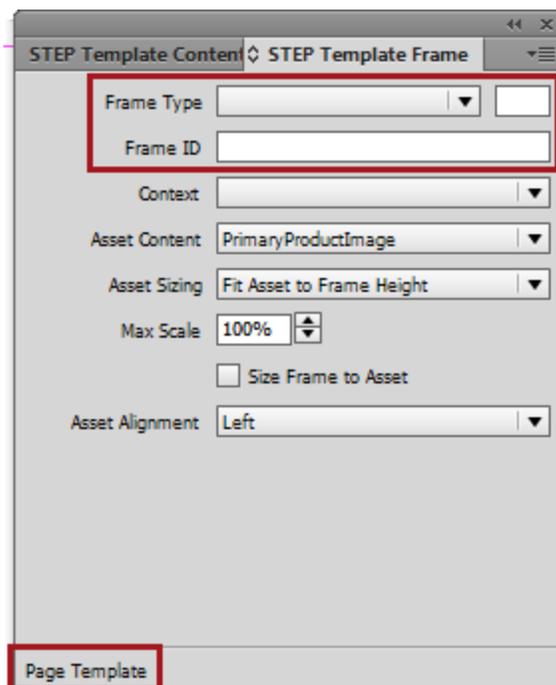
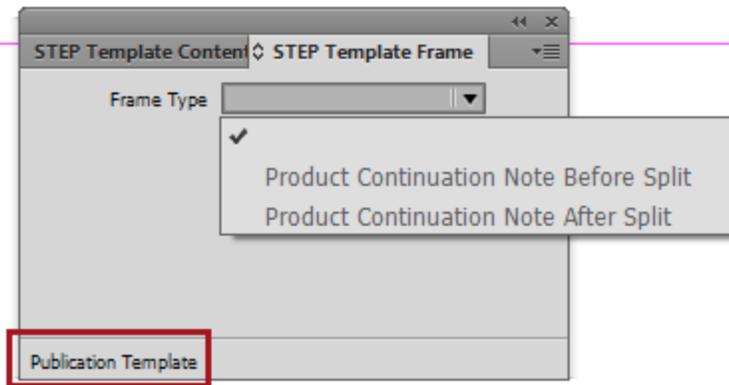


Image Frame Parameters for Publication Templates

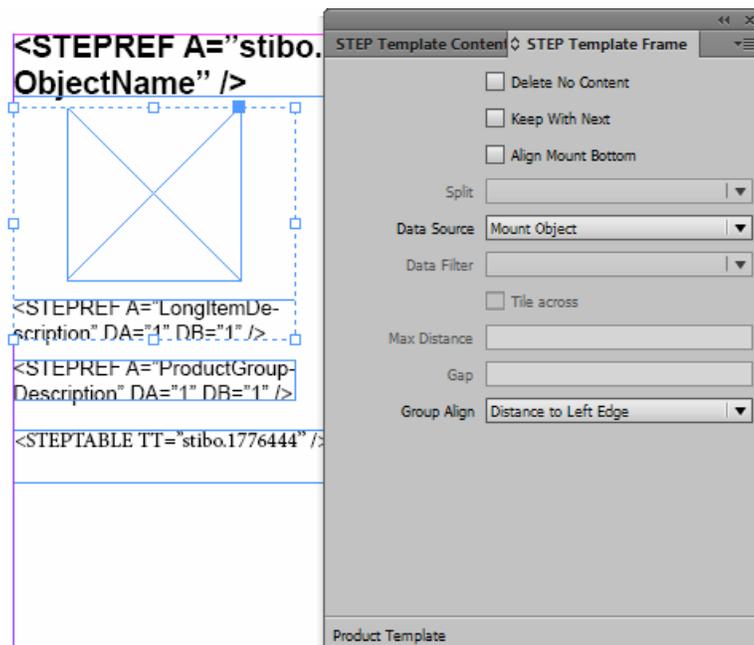
Though a 'Frame Type' dropdown list is available for image frames when working with publication templates, the options are grayed out, as they are not applicable to image frames. The dropdown exists, however, in the instance that it might have a future use if a customer need arises.

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



Grouped Frame Parameters in the STEP Template Frame Palette

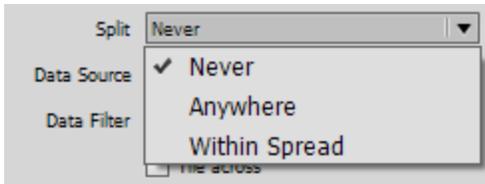
Below is a description of the individual parameters available when configuring grouped frames using the STEP Template Frame palette in InDesign. One common use for grouped frames is to group an image frame together with a text frame in order to mount a linked asset and a metadata attribute connected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



- Delete No Content:** This option can be best understood as 'Delete IF No Content.' Check this box to ensure that the group of frames does not mount on pages if no content exists in STEP for *all* of the individual frames included in the group.
- Keep With Next:** Check this box to ensure that the grouped frame remains with the frame that follows it (resides directly below) on the page. A frame with **Keep With Next** set cannot have a **Split** setting of **Anywhere** or **Within Spread**, and vice versa.
- Align mount bottom:** Select this to ensure that a grouped frame will always mount at the bottom of the page. In Flatplanner, the frame will align to the bottom of the Flatplan frame. If more than one frame is designated to

align mount bottom, the lowermost frame will align to the bottom and the other frame(s) will mount above it, separated by the same gap amount as on the product template.

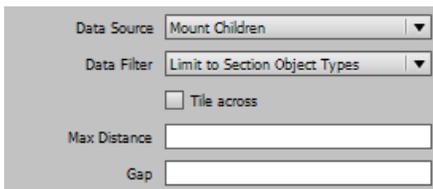
- **Split:** The three split options are **Never**, **Anywhere**, and **Within Spread**.



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

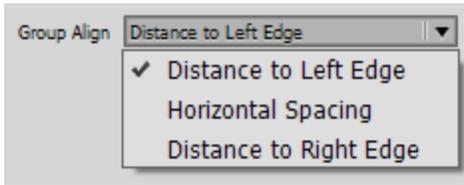
- **Data Source:** This controls whether the grouped frames should mount content from the object that is being mounted (**Mount Object**; most common), from children of the mounted object (**Mount Children**), or from an asset or product linked to the mounted object by a reference type. By default, the data source is **Mount Object**, which extracts values from the mounted object only.

Select **Mount Children** or a product / asset reference type when the grouped frame is intended to repeat on the page. The frame repeats in instances where information is available from multiple child objects or from multiple referenced products or assets. When selected, the following options are activated in the STEP Template Frame palette: **Data Filter**, **Tile across**, **Max Distance**, and **Gap**.



- **Data Filter:** Only activated when Data Source is 'Mount Children.' Choose **Limit to Section Object Types** when using the STEP REPEAT function to mount metadata attributes and/or other information from child section objects when mounting publication or section objects. This functionality is typically used in AutoPage publications to create tables of contents / section indexes. See the **Creating Tables of Contents in AutoPage** section of the **AutoPage** documentation for more information.
- **Tile across:** Check this box if repeated frames should be tiled horizontally across the page instead of stacking vertically beneath one another
- **Max Distance:** The maximum distance that horizontally tiled frames should repeat across the page (L-R) before stopping and wrapping back around to begin a new row of repeated frames underneath
- **Gap:** The amount of space to place between repeated frames when tiled horizontally

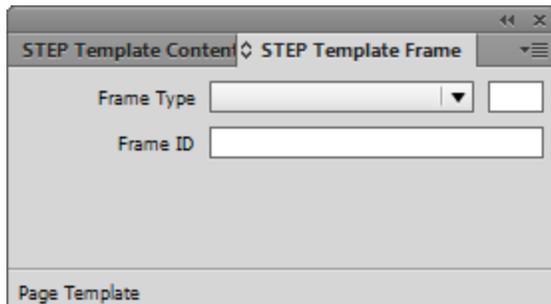
- **Group Align:** Three options are available in the Group Align dropdown menu that enable you to set additional parameters for grouped frames.



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

Grouped Frame Parameters for InDesign-created Page Templates

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

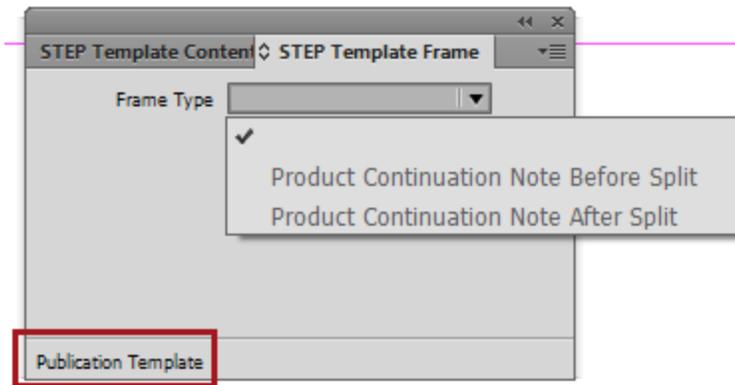


For information on how to use these options, see the **Galley Templates** section of the **Flatplanner** documentation.

Grouped Frame Parameters for Publication Templates

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

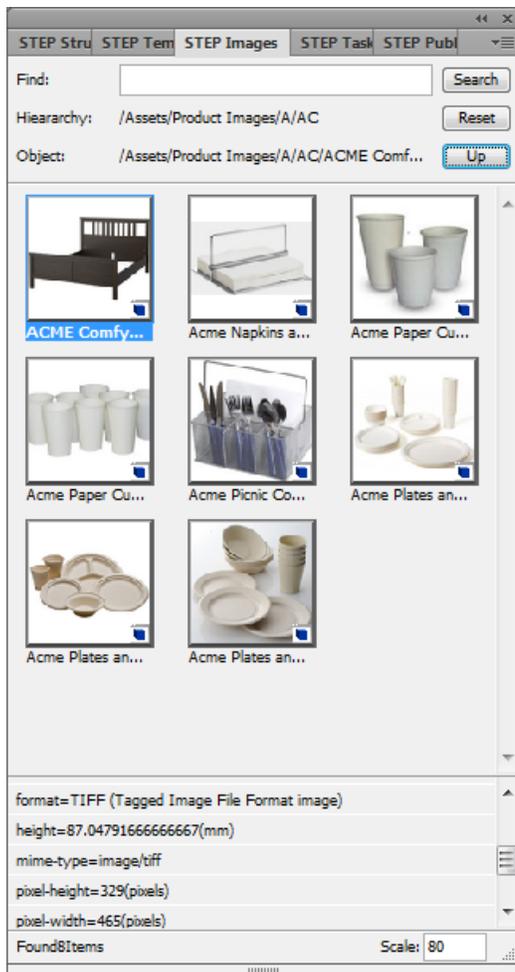
These two options (Product Continuation Note Before Split and Product Continuation Note After Split) only apply to text frames on publication templates that will be used in AutoPage publications. See **About Templates in AutoPage** in the **AutoPage** documentation for more information.



STEP Images

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

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



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

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

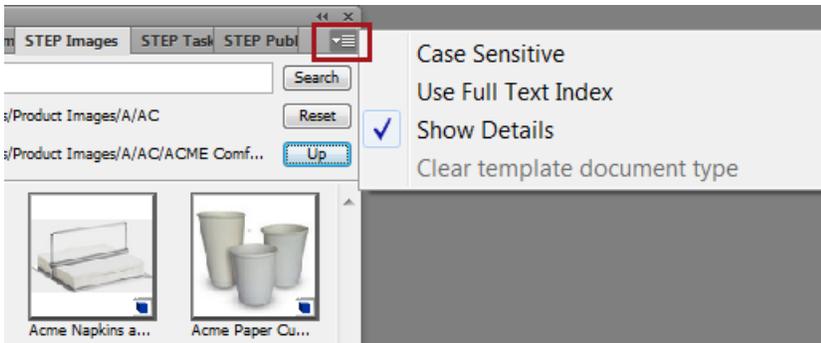
Clicking the **Up** button will bring the view one level back.

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

Options Menu

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

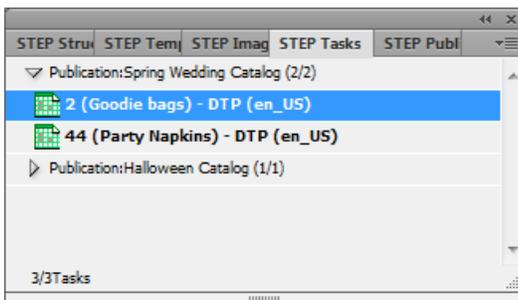
- **Case Sensitive:** Use this option to determine if you want to search in case sensitive mode or not.
- **Use Full Text Index:** Use this option to search for attribute values that are defined as full text indexable in the attribute editor in STEP. (It may take a little while to show the results).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



STEP Tasks

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

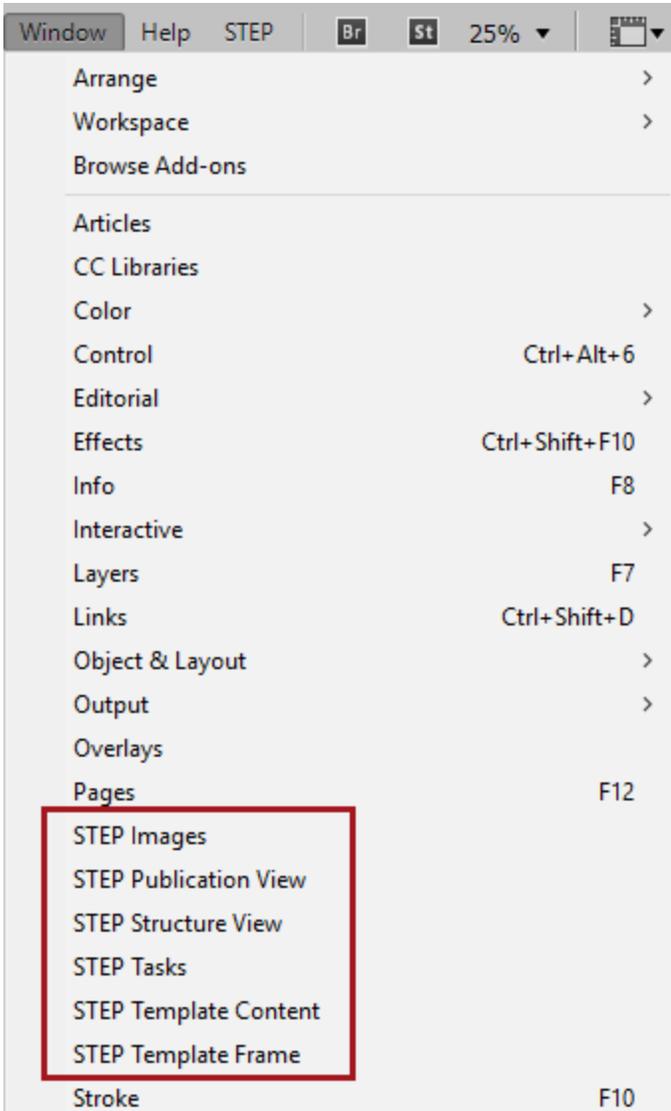
From the STEP Tasks palette, DTP operators can accept tasks, submit tasks, reject tasks, and more. Tasks typically arrive in the STEP Tasks palette after the page has already been planned in STEP by a merchandiser user, and then released to the DTP operator for further work.



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

Accessing the STEP Tasks Palette

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



Description of the STEP Tasks Palette

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

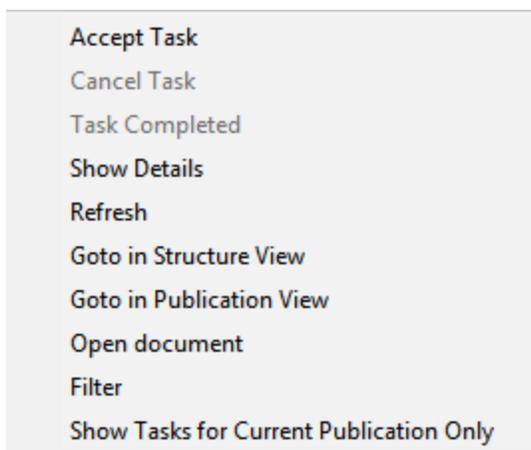


1. **Publication:** Each task (Flatplanner planned page) is organized by publication in the STEP Tasks palette. The numbers in parentheses after the publication name represent the number of unaccepted tasks for the publication / number of available tasks for the entire publication.
2. **Task:** The Flatplanner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

Options Menu

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

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



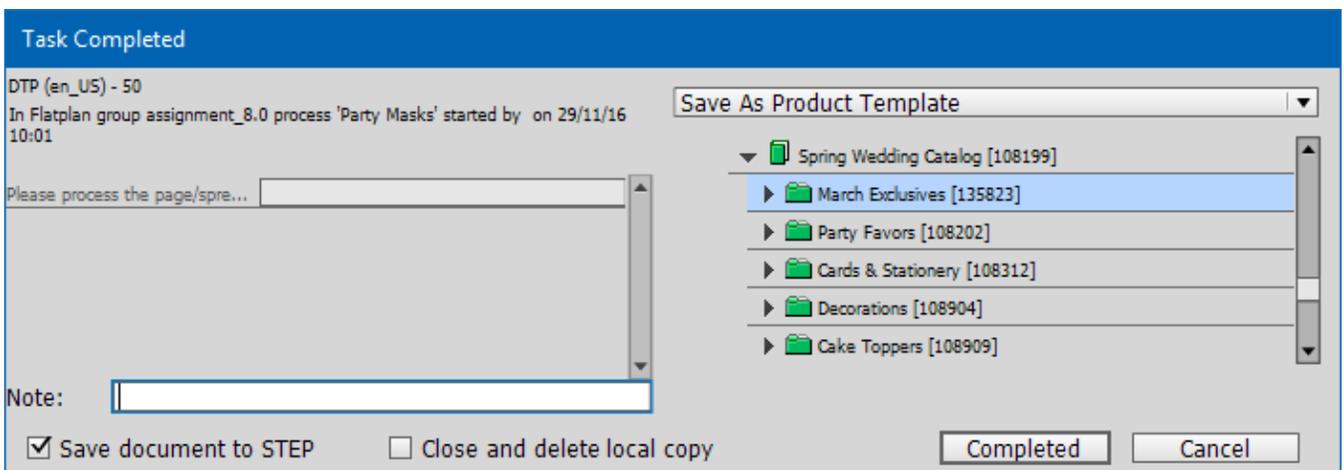
- **Accept Task:** Launches the 'Accept' Task dialog. To accept the task, click 'Accept'. To cancel and leave the task unaccepted, click 'Cancel'. To open the document in InDesign once the task is accepted, check 'Open document' before clicking 'Accept'. To automatically jump to the planned page in the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



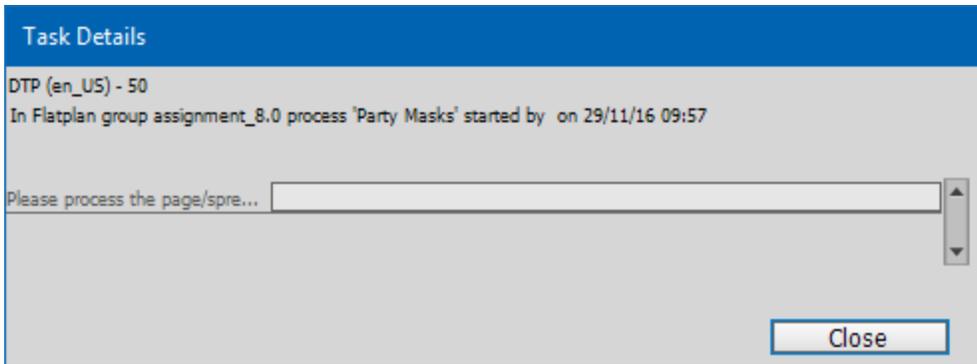
- **Cancel Task:** Launches the 'Cancel Task' dialog. This option is only activated when an accepted task is selected. Click 'Cancel Task' to return the accepted task to the list of incomplete tasks. After canceling a task, the name of the task becomes bold again and the list of tasks is refreshed. (Note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

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

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



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



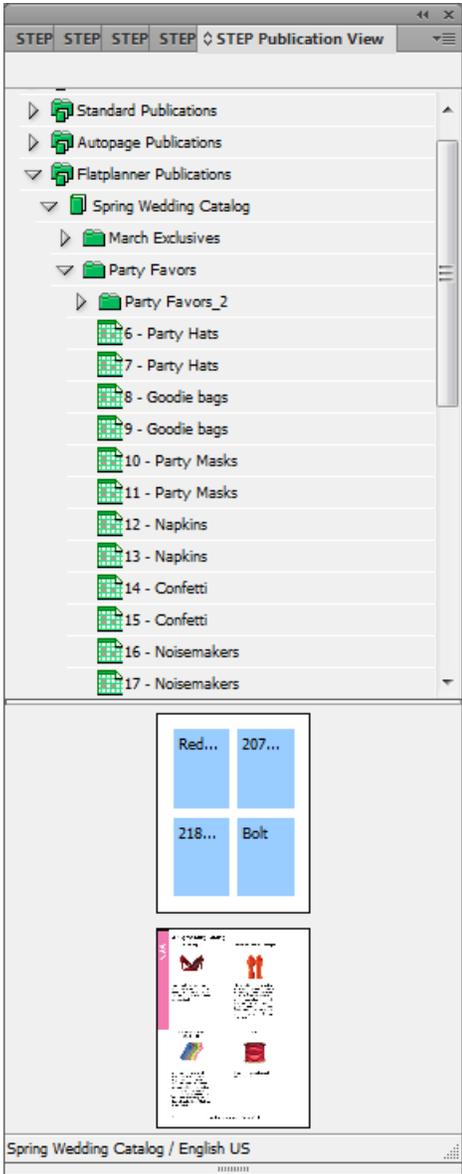
- **Refresh:** Click to refresh the list of tasks.
- **Goto in Structure View:** Click to jump to the planned page in the STEP Structure View palette.
- **Goto in Publication View:** Click to jump to the planned page in the STEP Publication View palette.
- **Open document:** Click to open the InDesign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

STEP Publication View

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

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

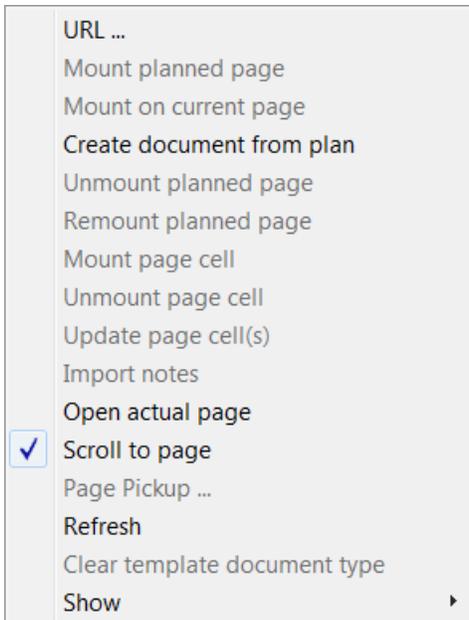
Note: Search functionality is not available within the STEP Publication View panel.



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

Options Menu

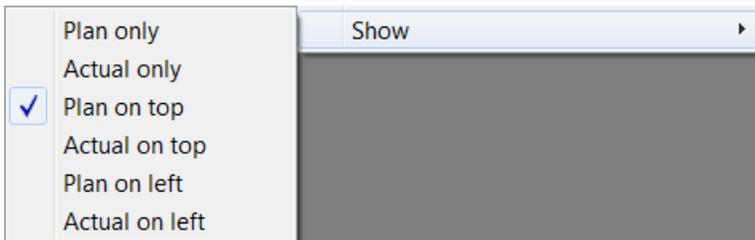
The **Options** menu in the STEP Publication View (arrow in upper right corner) contains the following commands.



- **URL:** Selecting this option allows you to enter a STEP URL pointing to a node in STEP. This way you can easily navigate to a specific node without browsing through the Structure View.
- **Mount planned page:** Use this option to mount a planned page.
- **Mount on current page:** Use this option to mount a planned page on a specific page, e.g. page 3 in your InDesign document.
- **Create document from plan:** Use this option to mount the plan using the publication template saved in STEP.
- **Unmount planned page:** Use this option to remove mounted plan on a page.
- **Remount planned page:** Use this option to remount planned pages if content in STEP has been updated since the page was originally mounted.
- **Mount page cell:** Use this option to mount a page cell if you have mounted a Flatplan and selected a cell in the Preview area (lower area of the STEP Publication View).
- **Unmount page cell:** Use this option to unmount a page cell if you have mounted a Flatplan and selected a cell in the Preview area (lower area of the STEP Publication View).
- **Update page cell(s):** Use this option to update cells if you have mounted a Flatplan and selected a cell in the Preview area (lower area of the STEP Publication View). If you need to update page cells, a “not equal” symbol  is shown in the STEP Publication View.
- **Import notes:** Use this option to import Notes placed on the Flatplan in STEP
- **Open actual page:** Use this option to open a DTP document (InDesign page) from a section in your publication.
- **Scroll to page:** Use this option to auto-scroll the page in the document that corresponds to the selected Flatplan in the STEP Publication View.
- **Page Pickup:** n/a - Currently not available.

- **Refresh:** Use this option to update the STEP Publication View.
- **Show:** Use this option to choose between different views of the pages (actual / planned) in the lower part of the STEP Publication View.

Available **Show** options are Plan only, Actual only, Plan on top, Actual on top, Plan on left, and Actual on left.



Templates in STEP'n'design

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

The STEP'n'design plug-in enables creation of the following template documents:

- Publication templates
- Product templates
- Page templates

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

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

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

Note: Since page templates are only used with Flatplanner, they are not covered in the STEP'n'design portion of the STEP online help documentation. See the **Creating PageTemplates** topic in the **Flatplanner** documentation for more information.

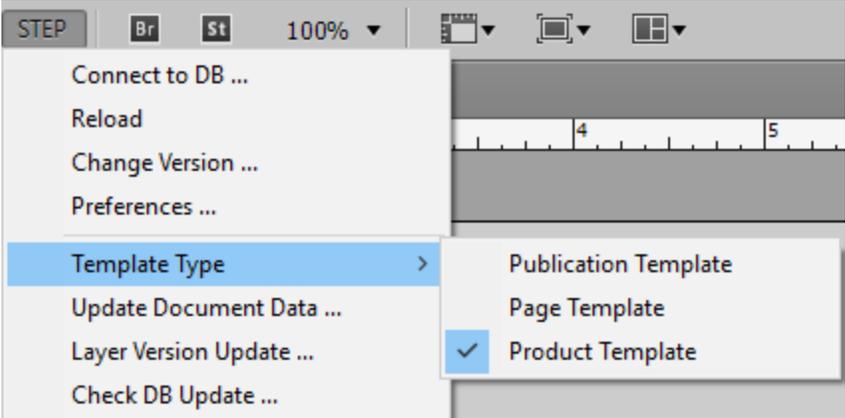
Which templates to use depends on the STEP publisher components that your system contains (see table below).

	STEP'n'design	STEP Flatplanner	STEP AutoPage
Product Template	X*	X	X
Page Template		X	
Publication Template	X	X	X

* The use of product templates is optional when building publications strictly through drag and drop, but strongly recommended.

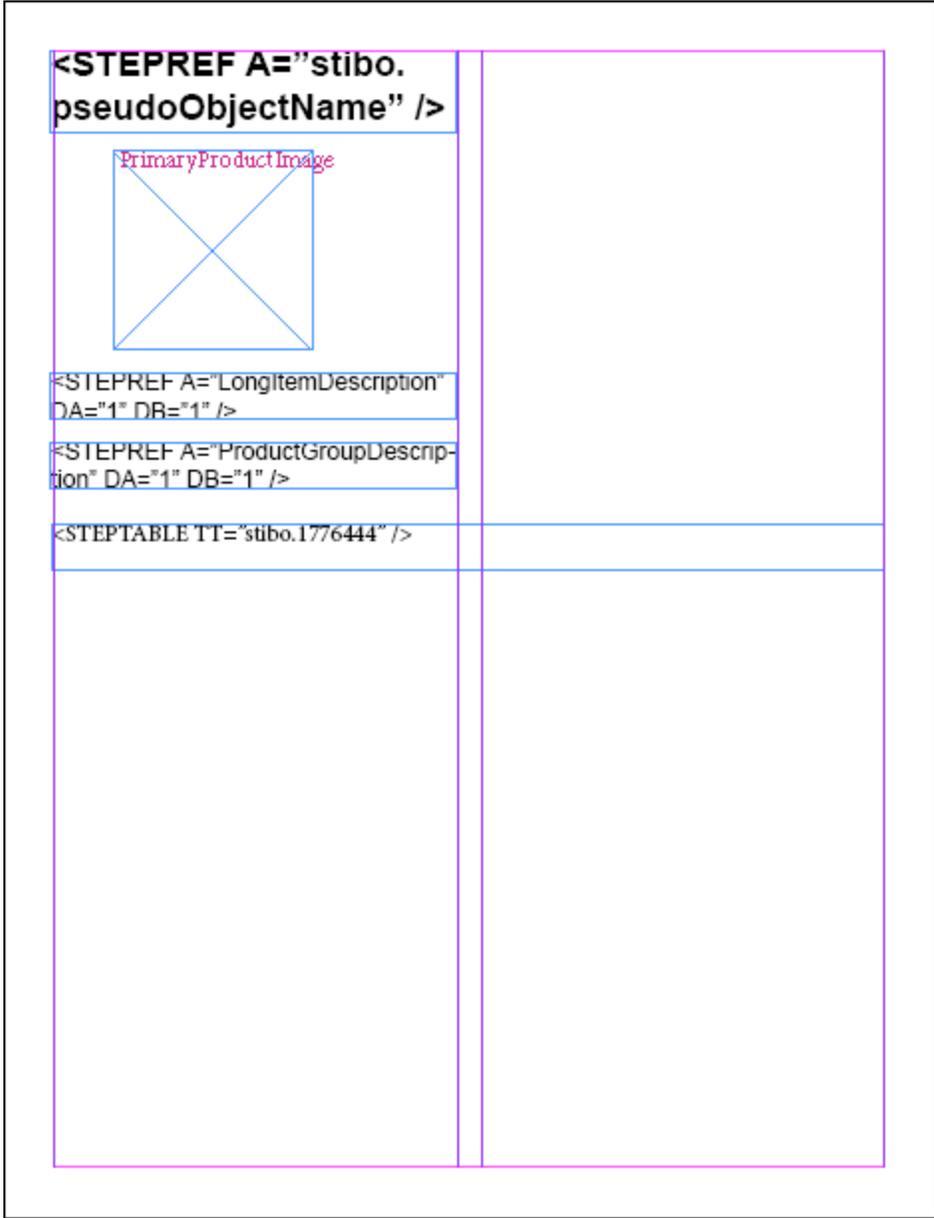
Note: The product templates used when working with or without STEP Flatplanner / STEP AutoPage are exactly the same.

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



Product Templates

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



Advantages of Using Product Templates

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

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

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

Topics Covered in this Documentation Section

This documentation section addresses the following product template topics:

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

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

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

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

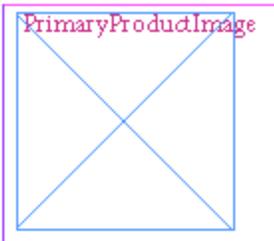
Creating a Product Template

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

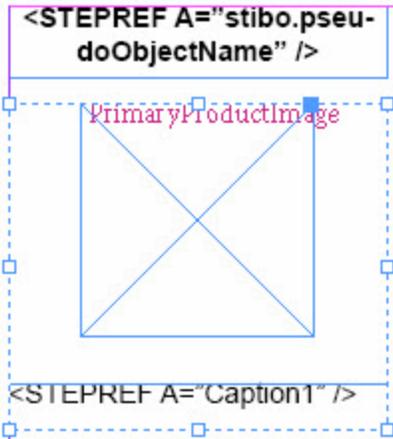
Product template **text** frames contain STEPXML tags that can mount information from attributes, 'object properties' such as STEP ID or name, commercial terms list values, and tables.

```
<STEPREF A="stibo.pseudoObjectName" />
<STEPREF A="ShortDescription" />
Price this week: $<STEPREF A="Price" />
<STEPTABLE TT="stibo.1776444" />
```

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



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



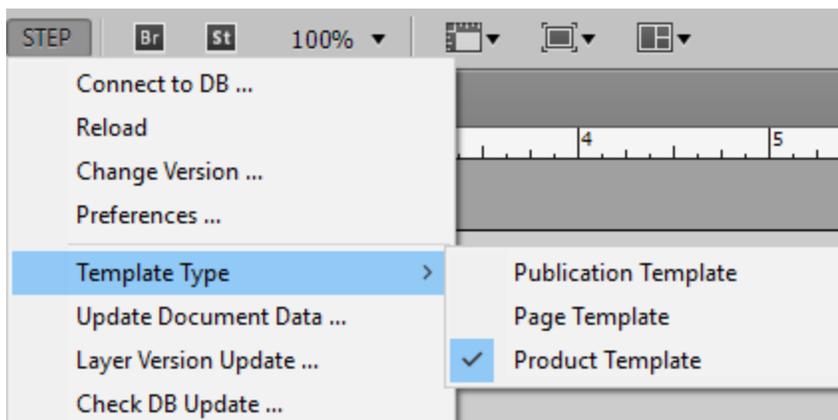
The general method for creating a new product template is as follows:

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

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

Create the Document and Designate the Template Type

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

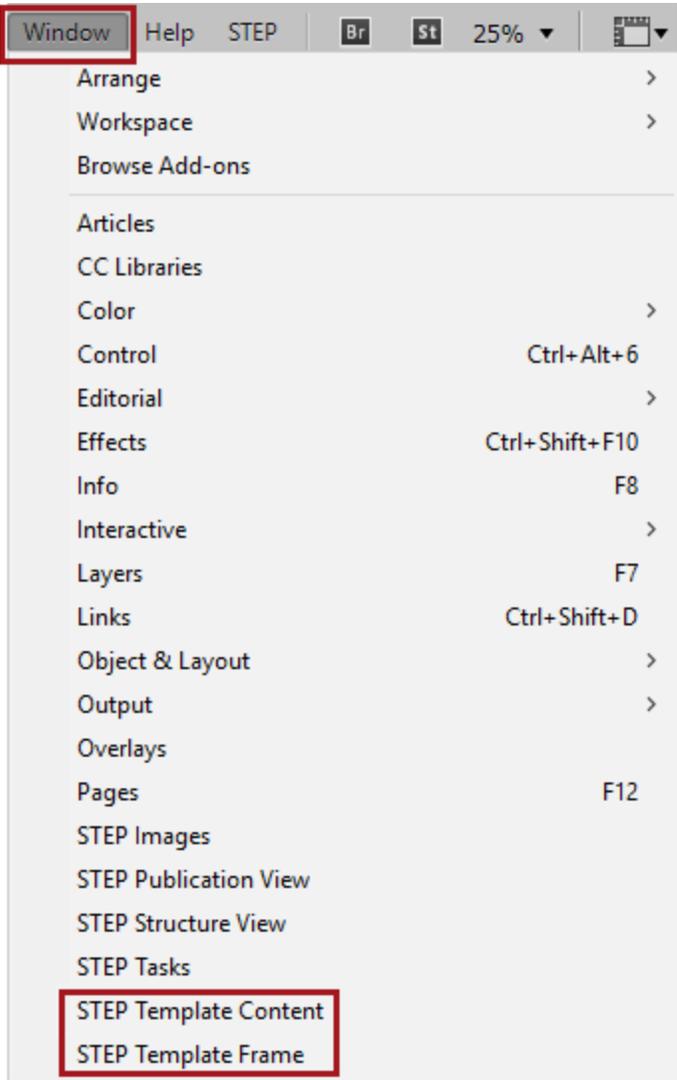


Open the STEP Template Palettes

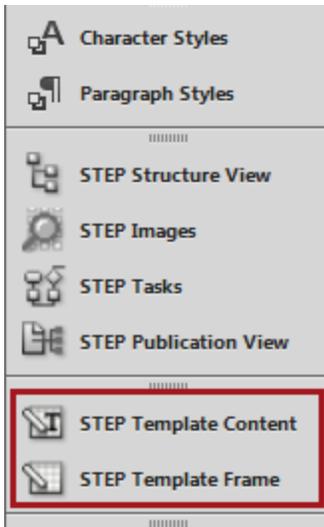
Two STEP palettes (also known as *panels* in InDesign terminology) are used to create product templates from your blank document: **STEP Template Content** and **STEP Template Frame**.

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

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



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



Text Frames in Product Templates

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

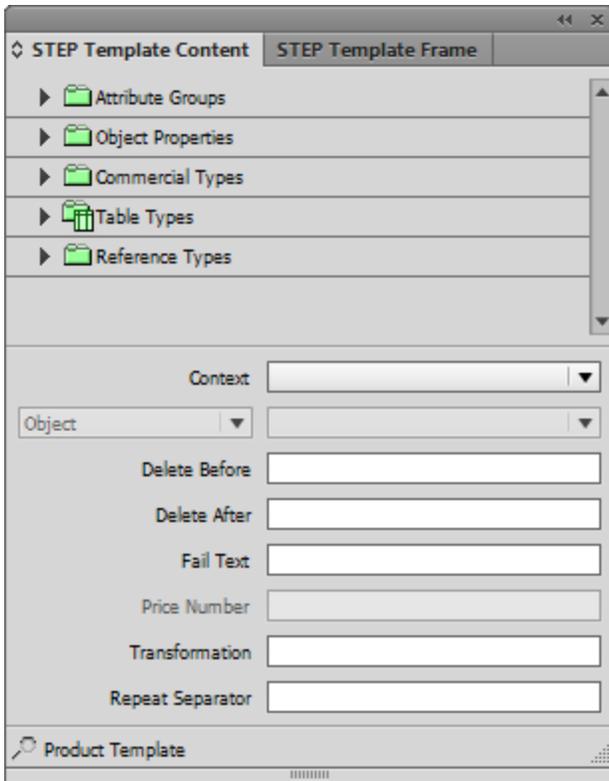
Once the frame has been placed, its size can be edited and additional tags and content can be added to it. Standard practice is to create the frame with the correct width and height for your future output. However, additional configurations can be applied to these frames from the STEP Template Frame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

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

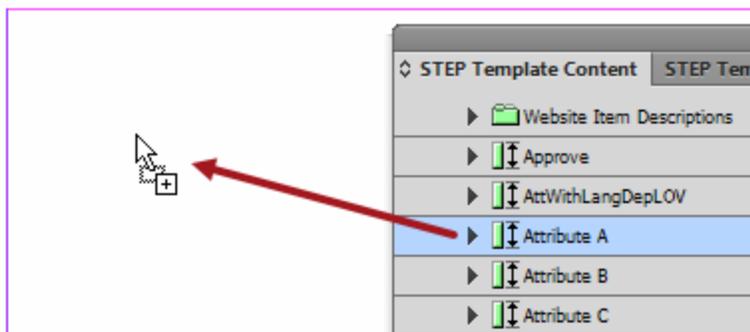
Dragging Elements Directly From the STEP Template Content Palette

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

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



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



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

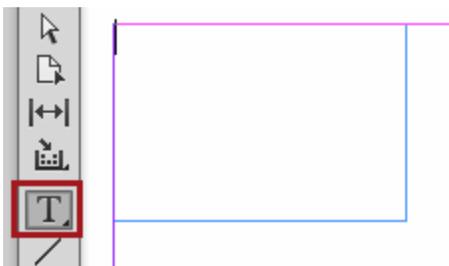
```
<STEPREF A="AttributeA" />
```

5. Resize and reposition the frame as needed.

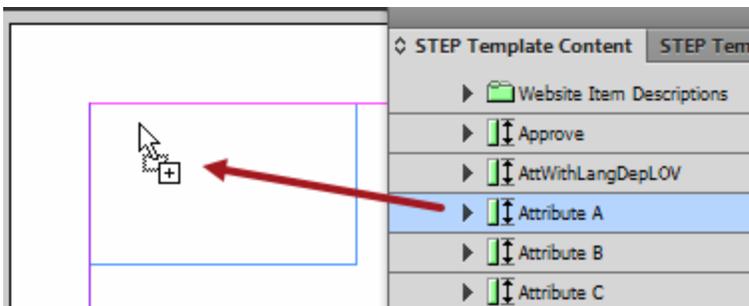
Using the Text Tool to Draw the Frame

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

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



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



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

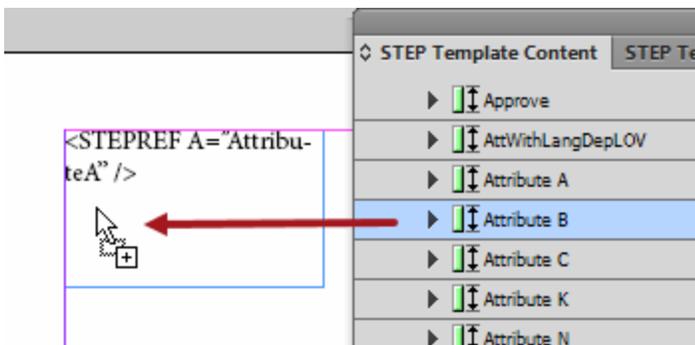
```
<STEPREF A="AttributeA" />
```

Insert Additional Attributes into Existing Text Frames

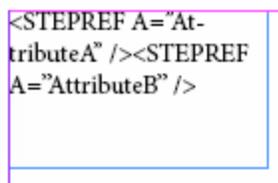
It is common for more than one STEP tag to appear in a frame, and there is no limit on how many tags can be placed into a single frame, since overset text is allowed in the text frame. Auto-sizing features for frames, applied on the STEP Template Frame palette, will ensure that the frame sizes to fit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

To add additional STEP tags to your frame:

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



3. The second attribute now displays in the frame.



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

Edit STEP Tags Within a Text Frame

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

Add Plain Text and Characters Between STEPXML Tags

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

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

```
<STEPREF A="Attribu-
teA" />
<STEPREF A="At-
tributeB" />#
```

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

```
<STEPREF A="stibo.pseudoObjectName" />
<STEPREF A="ShortDescription" />
Price this week: $<STEPREF A="Price" />
<STEPTABLE TT="stibo.4117215" />#
```

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

Edit XML Tags Freehand

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

Additional Configurations for Product Template Text Frames

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

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

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

Image Frames in Product Templates

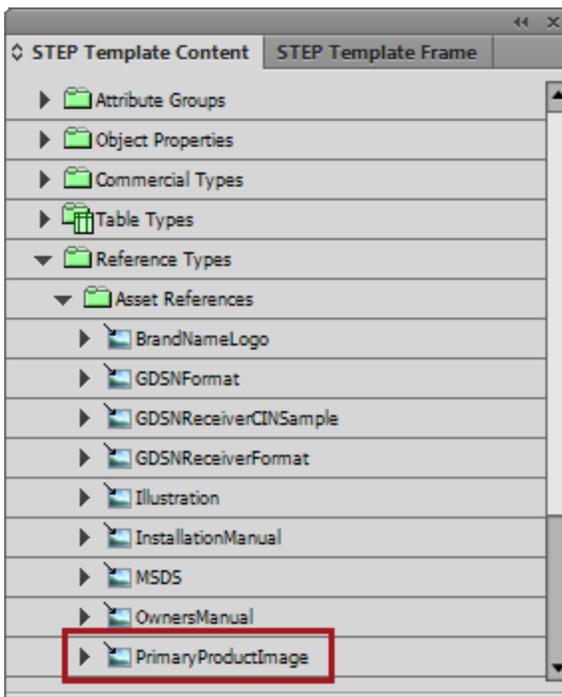
This topic explains the initial creation and configuration of image frames in product templates. Image frames are added to product templates in much the same way as text elements are, except there is some overlap between how adding images works between the STEP Template Content palette and the STEP Template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

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

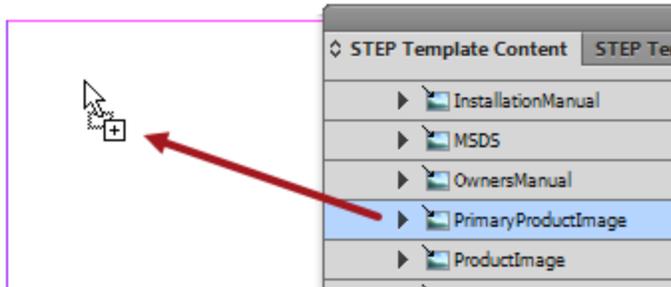
Dragging Asset References Directly From the STEP Template Content Palette

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

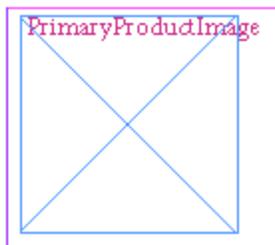
1. Open your product template, then open the **STEP Template Content** palette.
2. Search for or browse to the relevant reference type in the attribute tree of the palette. For this example, the PrimaryProductImage asset reference type will be used.



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



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



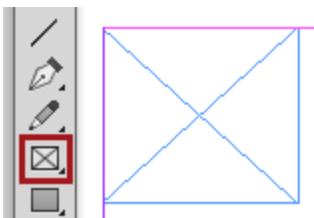
- Resize and reposition the frame as needed.

Note: Unlike text frames on product templates, only one asset reference type can be applied to an image frame at a time.

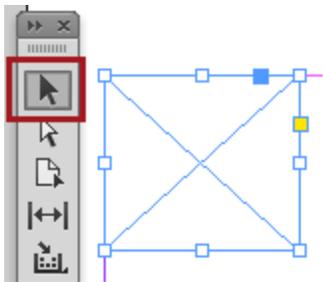
Using the Rectangle Tool to Draw the Frame

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

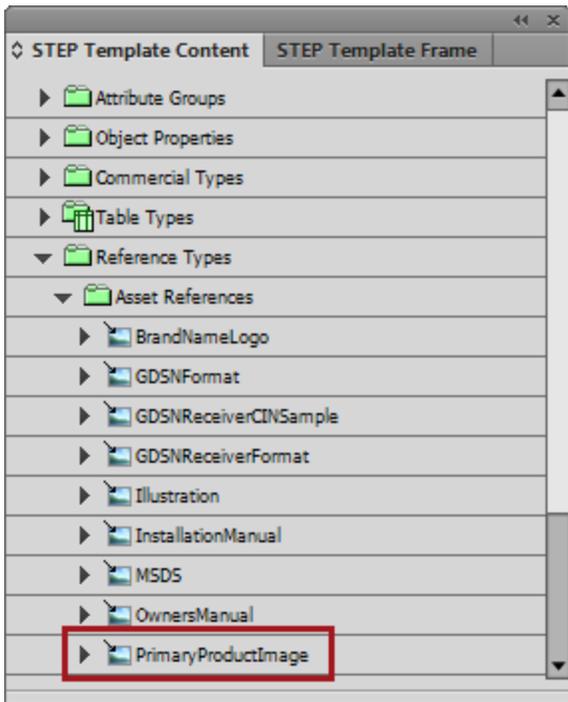
- Draw an image frame on the product template with the InDesign rectangle frame tool.



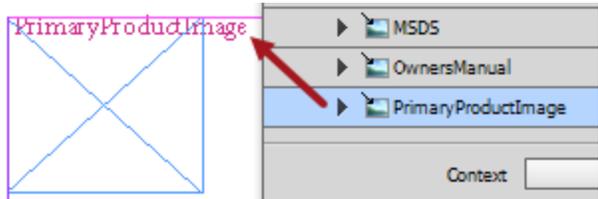
- Select the image frame with the InDesign selection tool.



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



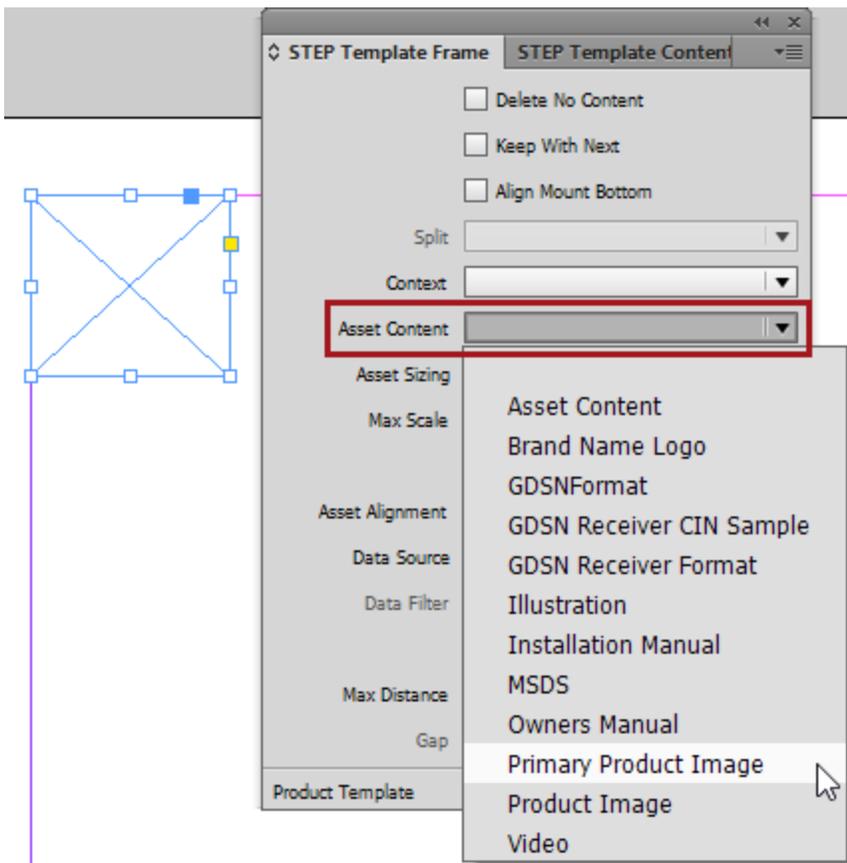
4. Once the asset reference type is selected, the STEPXML tagging is applied to the frame.



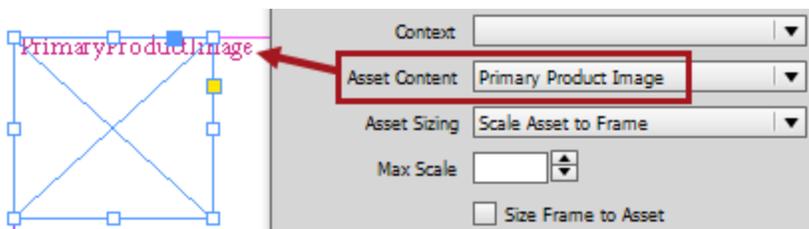
Using the STEP Template Frame Palette to Create the Image Frame

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

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



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



Additional Configurations for Product Template Image Frames

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

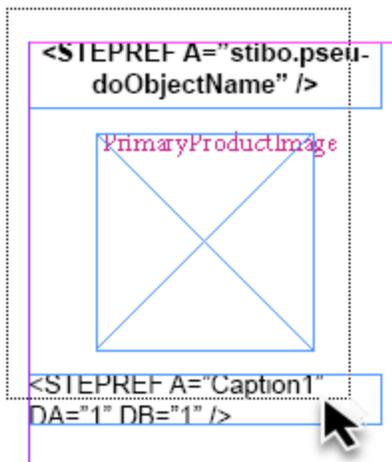
Grouped Frames in Product Templates

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

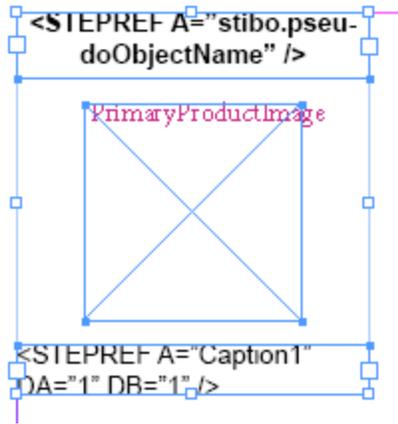
- To mount a linked asset and a metadata attribute connected to the asset (for example, an image caption) by grouping an image frame together with a text frame
- To tie together a product presentation with information from a referenced product, such as bringing in an image from a secondary product that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

Frames are grouped using standard InDesign functionality.

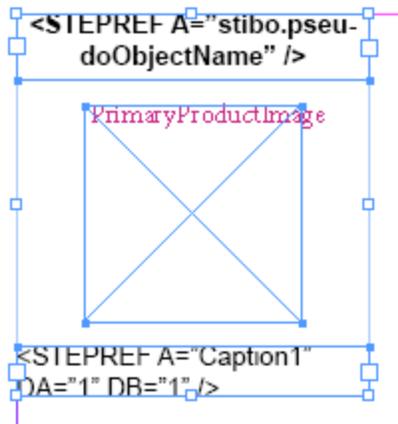
1. Choose the InDesign **selection tool**, then hold down the left button on your mouse while drawing a 'selection' frame around the objects that you wish to group.



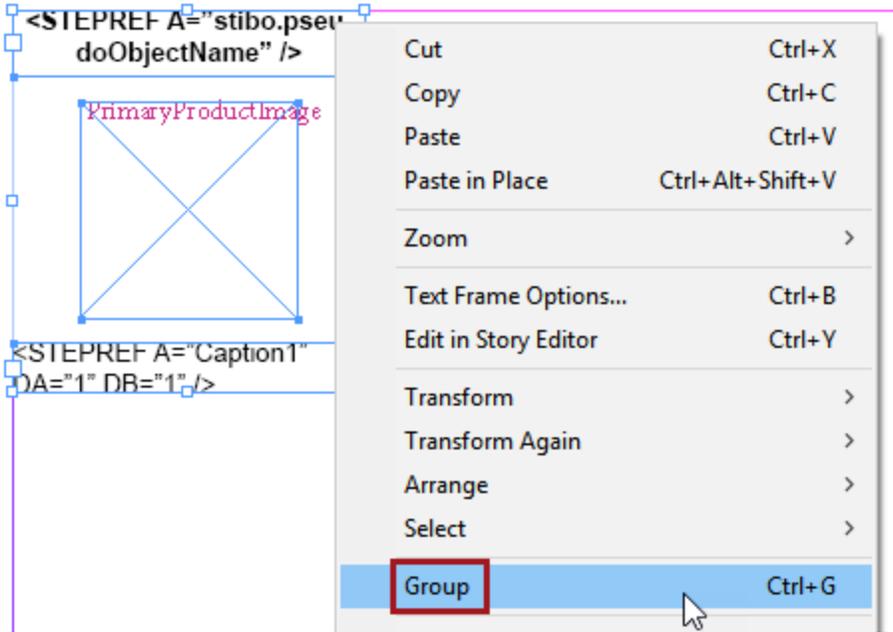
2. Release the mouse button to select all the frames.



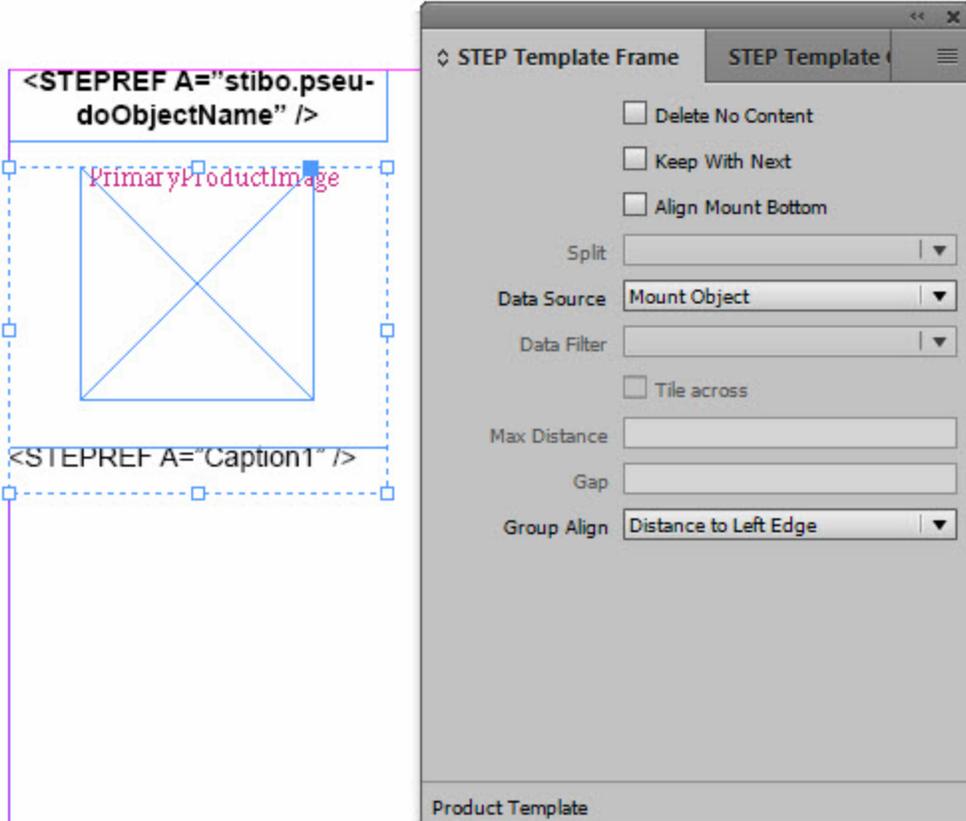
3. Right-click anywhere within the selected frames, then click **Group** from the popup menu. You may also right-click anywhere within the selected frames and press **Ctrl+G**.



4. The frames are now grouped.



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



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

Product Template Layout, Formatting, and Styles

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

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

Positioning Text and Image Frames

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

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

Positioning Frames

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

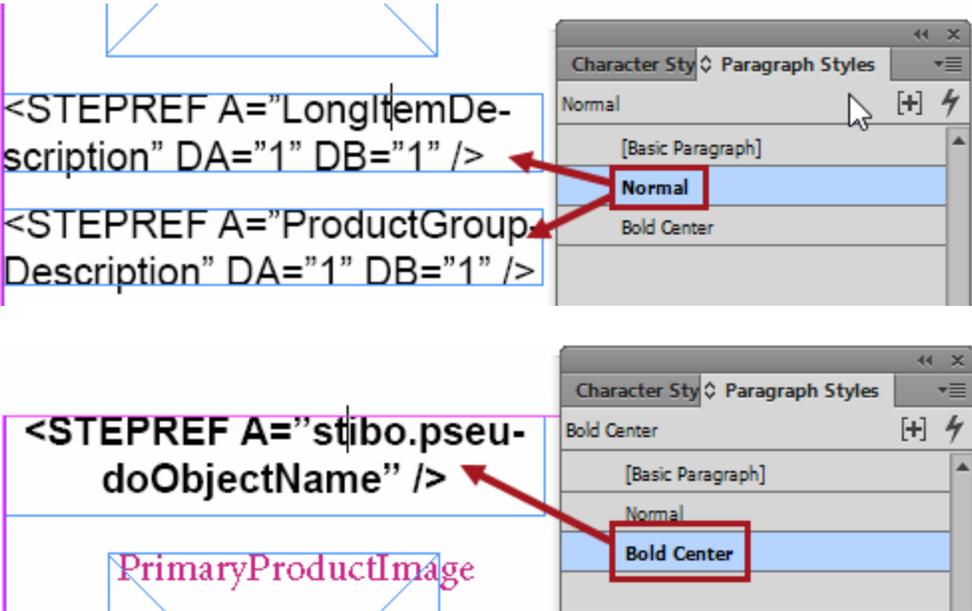
The distance between the elements in the product template will be kept when a product is mounted to the page using that template. When organizing and positioning your frames, you can use standard InDesign functions such as aligning, grouping, and rotation.

Applying Styles to Frames and Frame Contents

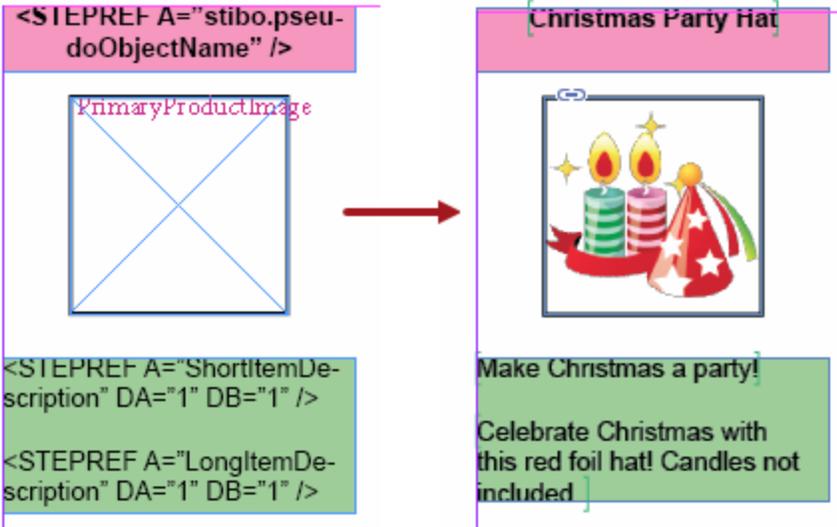
Even though STEP'n'design publication templates (also referred to as 'master pages' or 'mounting pages') are the documents that define the document size, margins, paragraph styles, character styles, table rules, swatches, and so forth that are used throughout a publication, it is strongly recommended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

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

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



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



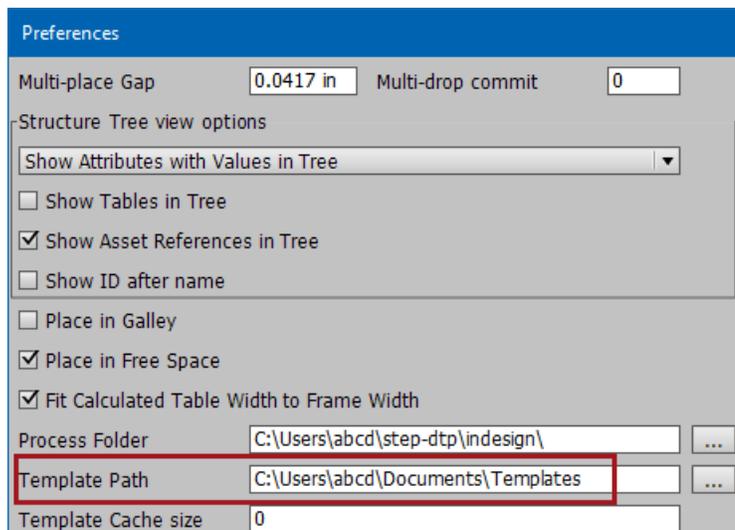
Note: Style tags do not need to be created in STEP for InDesign paragraph styles used in standard text frames. The only time STEP style tags are needed is for InDesign **character styles** and for text that appears within **tables**. See the **Publication Template Layout, Formatting, and Styles** topic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

Storing and Editing Product Templates

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

Storing Product Templates Locally

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



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

Storing Product Templates in STEP

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

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

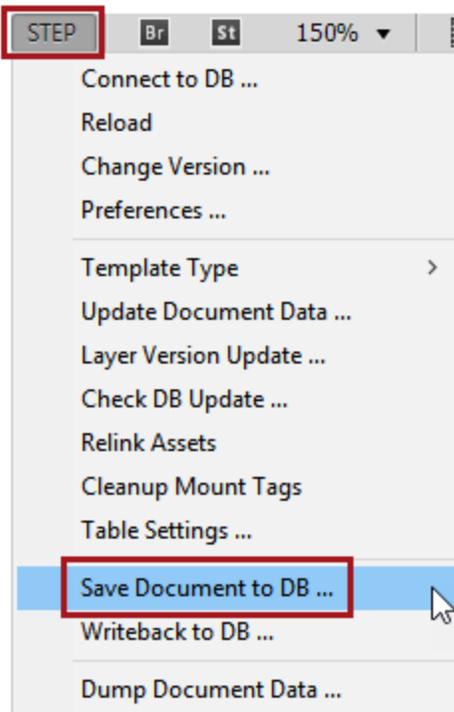
Note: For standard drag-and-drop functionality, *all* product templates do not have to be saved in STEP, but it is recommended to store them in STEP so other users can open and edit them if needed.

To store a product template in STEP:

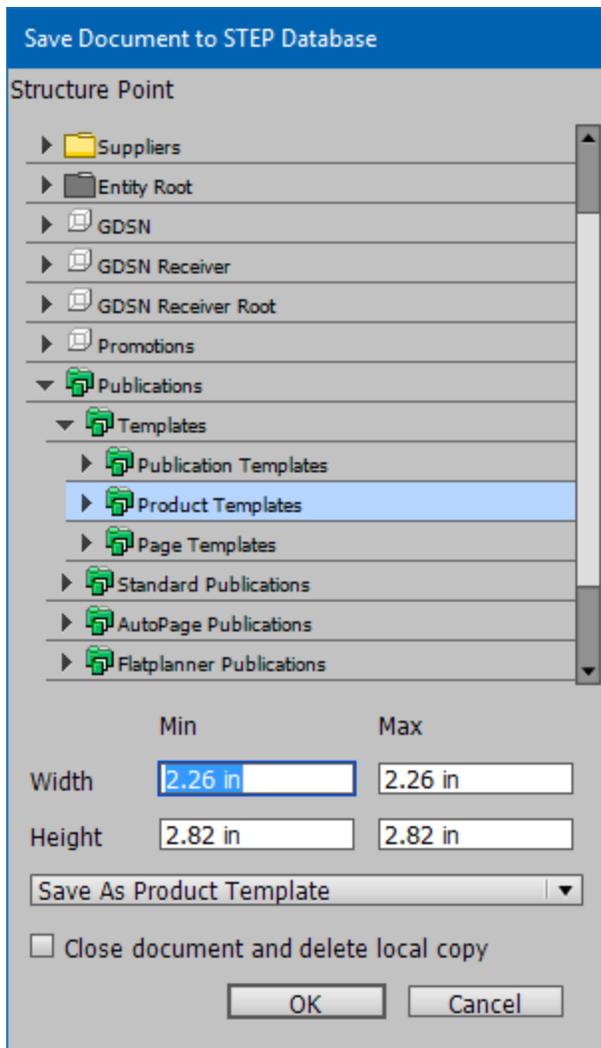
1. Save the InDesign document on your local hard drive as a standard InDesign file.

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

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



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



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

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

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

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

of your product template but can be overridden by entering new values in the fields. For more information on pagination rules, see **Pagination Rules for Flatplanner** in the **Flatplanner** documentation and **About AutoPage Pagination Rules** in the **AutoPage** documentation.

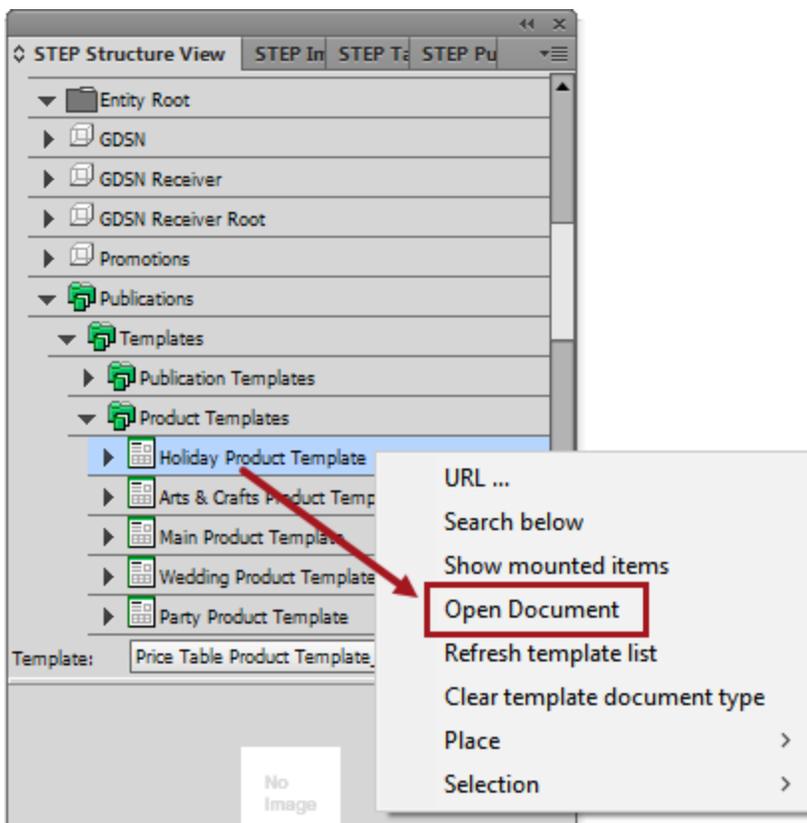
8. Click **OK**. The product template is saved in STEP.

Opening and Editing Product Templates

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

To open and edit a product template:

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



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

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

Creating a Table of Contents Product Template

Product templates that mount tables of contents in publications can be created in STEP'n'design. Tables of contents typically appear at the beginnings of publications and/or sections and can be mounted manually using 'drag and drop' operations, as well as automatically using AutoPage. These tables of contents can also be thought of as **section indexes**, as their intent is to alphabetically list the STEP names of all sections that appear within an entire publication and/or the names of all subsections that appear within a section.

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

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

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

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

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

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

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

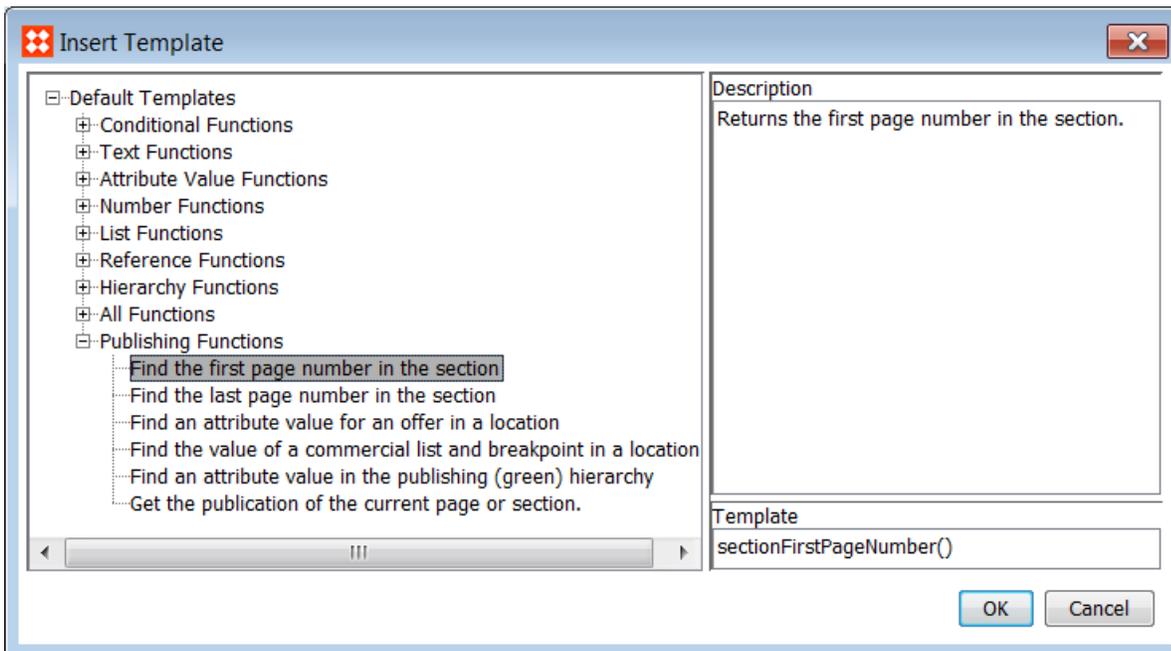
Note: Names of sections and subsections are mounted in alphabetical order in tables of contents / section indexes.

Configuring Page Number Calculated Attributes

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

To create these attributes, follow these steps:

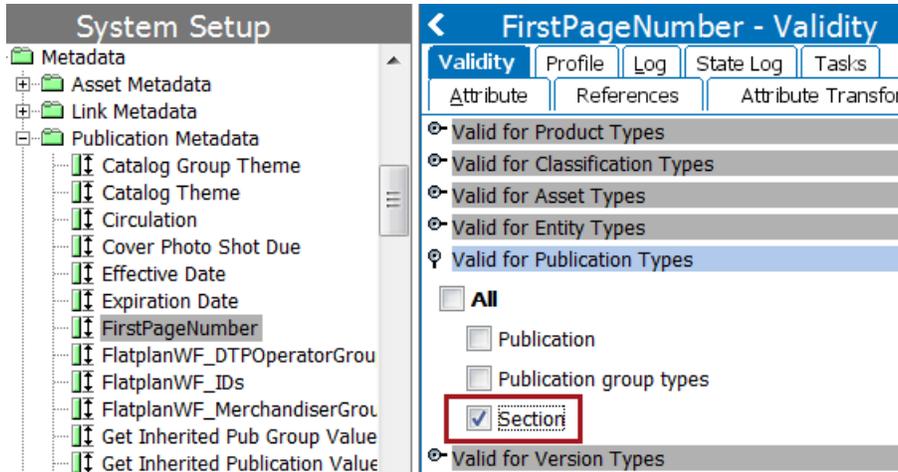
1. Create a Description attribute by the same method that you would create any other description attribute. (See the **Creating Attributes** section of the **System Setup / STEP Super User Guide** documentation for more information.) Give it a name that indicates what it is used for, e.g., FirstPageNumber.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



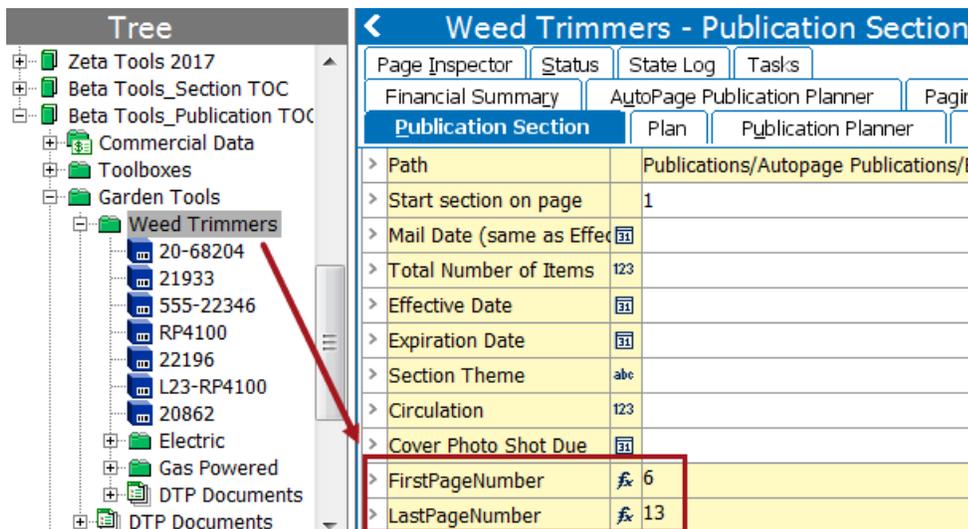
5. No additional action is needed in the **Function Editor**, so click **OK** to close it.
6. To create the second calculated attribute—which will pull the last page number in the section—the steps are identical to 1 - 5 above, except in step 4 you will select 'Find the last page number in the section.'

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

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

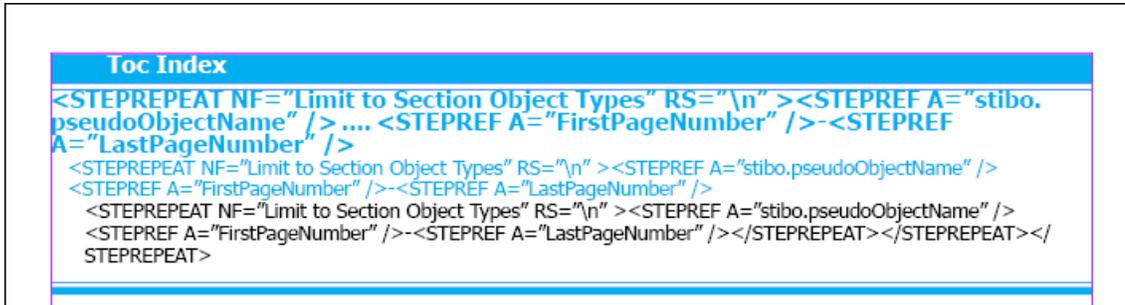


- When actual pages have been saved to STEP into your section, the calculated attributes will display page numbers as such:



Configuring the Table of Contents Product Template

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



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

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

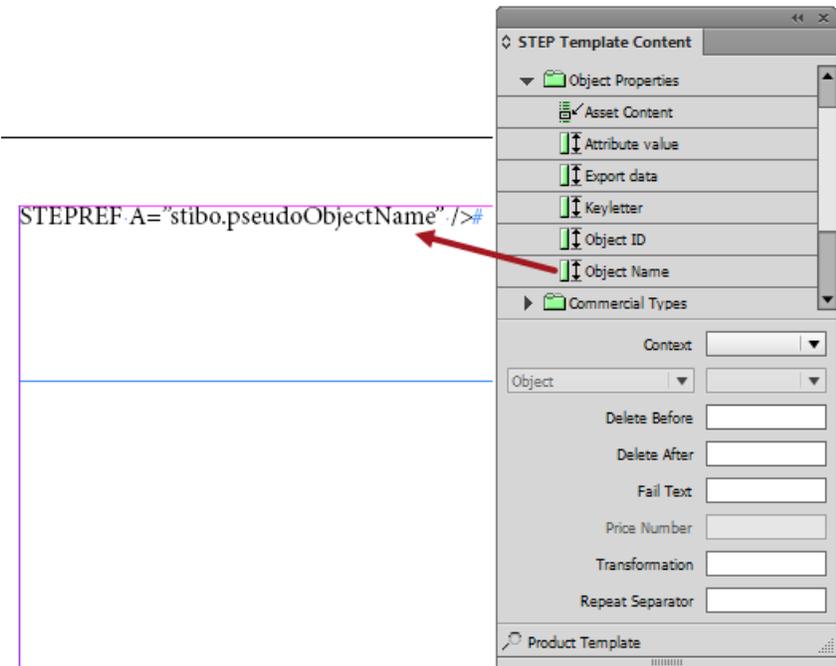
```
<STEPREPEAT NF="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObjectName" />
<STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" />

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

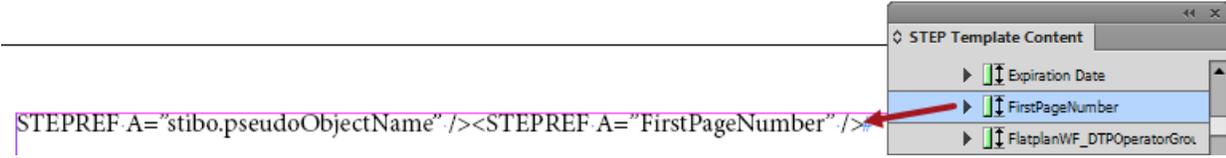
<STEPREPEAT NF="Limit to Section Object Types" RS="\n" ><STEPREF A="stibo.pseudoObjectName" />
<STEPREF A="FirstPageNumber" />-<STEPREF A="LastPageNumber" />
/></STEPREPEAT></STEPREPEAT></STEPREPEAT>
```

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

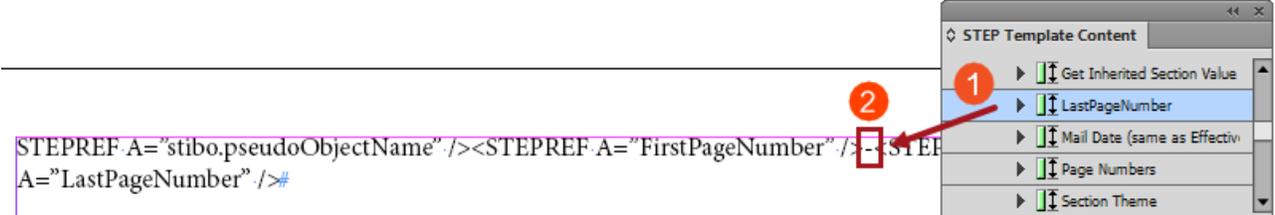
1. With your product template open, open the **STEP Template Content** palette by navigating to Window > STEP Template Content from the application bar across the top of the InDesign interface.
2. Using the InDesign **Text** tool, draw a text frame to the width that you would like your table of contents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



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



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

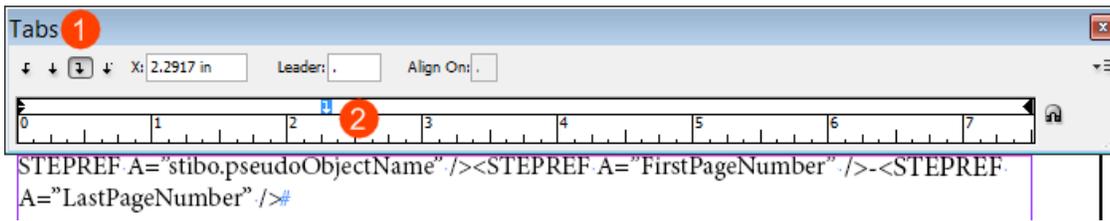


- 6. To set up the dots (dot leader) between the tags for the section name and the first page number, follow these steps.

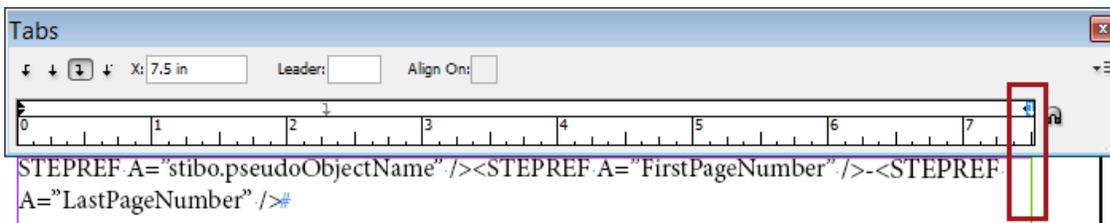
Note: This dot leader should be added to your paragraph style so you can reuse it later if needed.

- With your text frame selected, navigate to Type > **Tab**s in the InDesign application bar. The **Tab**s dialog will display at the top of your text frame.

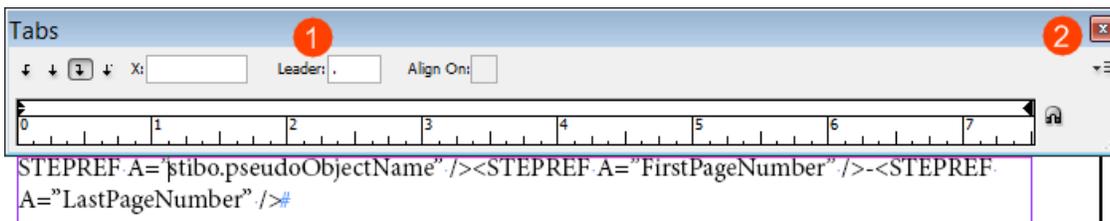
- Click the **right tab** icon, then click anywhere on the ruler to apply the right tab.



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



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



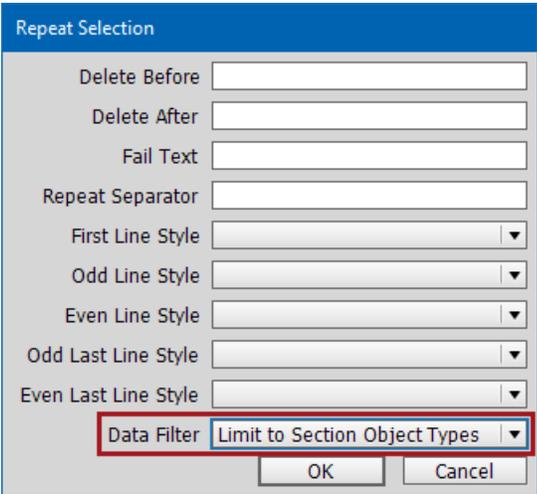
- Using the **text** tool, place your cursor between the tags for the section name and the first page number, then press the Tab key. The dots will appear between the two tags.

```
<STEPREF A="stibo.pseudoObjectName" /><...x...<STEPREF A="FirstPageNumber" /><STEPREF A="LastPageNumber" />#
```

- Next, using the text tool, highlight all content in the frame, then right-click and select **Repeat Selection**.
- On the **STEP Template Palette**, type `\n` into the **Repeat Sep.** (repeat separator) field. (The repeat separator is the string or character that will be placed between each repeated entry. `\n` is the symbol for hard return.) Then, click the **Options** menu in the upper right corner of the STEP Template Palette and click **Repeat Selection**.



- 10. In the **Repeat Selection** dialog that displays, choose **Limit to Section Object Types** from the **Data Filter** dropdown list, then click **OK**.



- 11. Your tagging should now look like this.

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

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

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

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

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

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

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

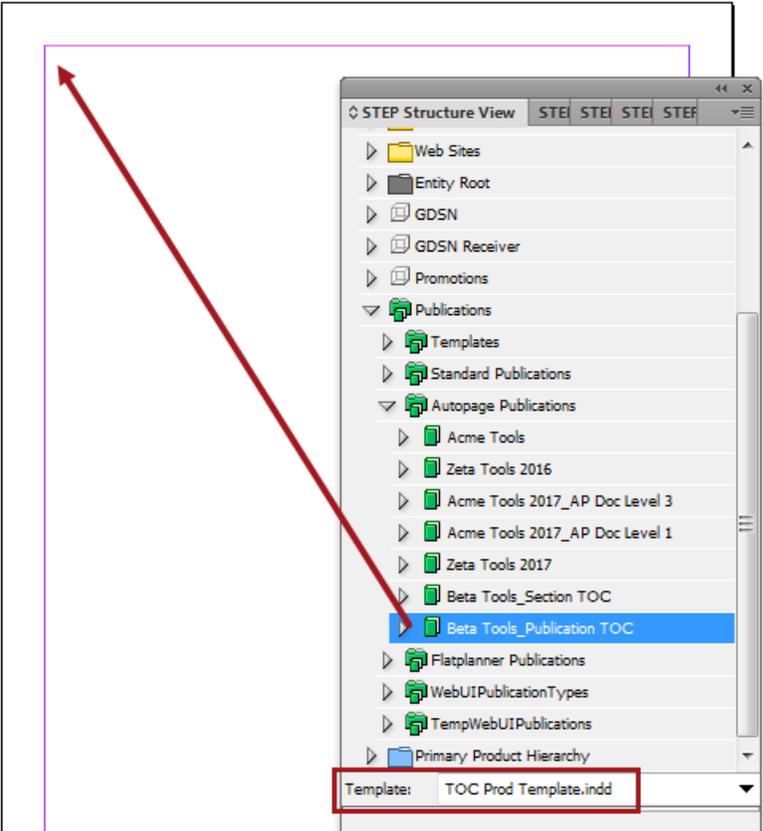
- Next, test your product template to ensure that it has been set up correctly.

Mounting the Table of Contents Product Template

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

To test the TOC product template, follow these steps:

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



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

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

Converting a Sample Document into a Product Template

A sample document created outside of STEP can be converted into a STEP'n'design product template in InDesign—either an entire page at once or one link at a time—by using the **Convert to STEP Product Template** and **Convert to STEP Tags** functions, respectively. These features are intended for use on existing pages on which all page elements are already arranged in the desired page layout, preventing the need to create

the product template from scratch. Though documents created outside of STEP are commonly used as a starting point for product template creation, these features enable users to partially (or even fully) automate the process instead of having to manually remove all content from frames, identify what STEP content belongs in each frame, and manually apply STEP'n'design template tagging to each frame.

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

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

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

Method 1: Entire Page at Once

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

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

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

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

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

Sample Document Elements

1 Acme® Door Knobs



DF • 5 • B 4

Black Ring Cut Glass Door Knob With Nickel Back Plate

Shown in Nickel

Price: £ 320.00 per pair 5

Available in Nickel.
Alternative finishes are not available due to glass composition.
Single door knobs may be purchased at half the price per pair.
Shown with smaller matching cupboard knob.

Ref. DF • 5 • C

Dimensions:	In	Cm
Backplate Diameter	2.60	6.60
Protrusion	4.00	10.16
Knob Diameter	2.00	5.08

Weight:	lb	Kg
	0.66	0.30

All items are handmade and specifications may vary slightly from those stated. 6

Un-sprung turning door knob for use with sprung mortice latches.
Supplied with spindles and screws as standard. Range of key hole escutcheons available.
Conversion to fixed handle upon request POA. Conversion kits are available for use with US locking systems.

All prices exclude VAT, export packing and delivery. Custom sizes and modifications are available on request.

For current lead times and full quotation, contact:
info@acmeprods.com or phone on +44 (0) 55 5555 5555

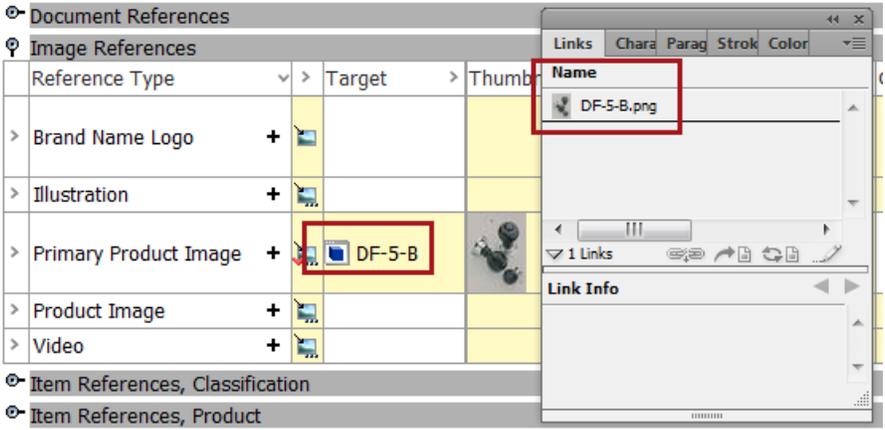
1. Brand Name:

Item Brand Information		
Name	>	Value
> Brand Owner	abc	Acme®
> Brand Name	abc	Acme® Door Knobs

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

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3. Manufacturer's Part Number:

Item Manufacturer Information		
Name		Value
Manufacturer Name	abc	
Manufacturer's Part Number	abc	DF • 5 • B
Manufacturer Warranty	abc	

4. Name:

Description		
Name		Value
ID		180582
Name		Black Ring Cut Glass Door Knob With Nickel Back Plate

5. Long Item Description:

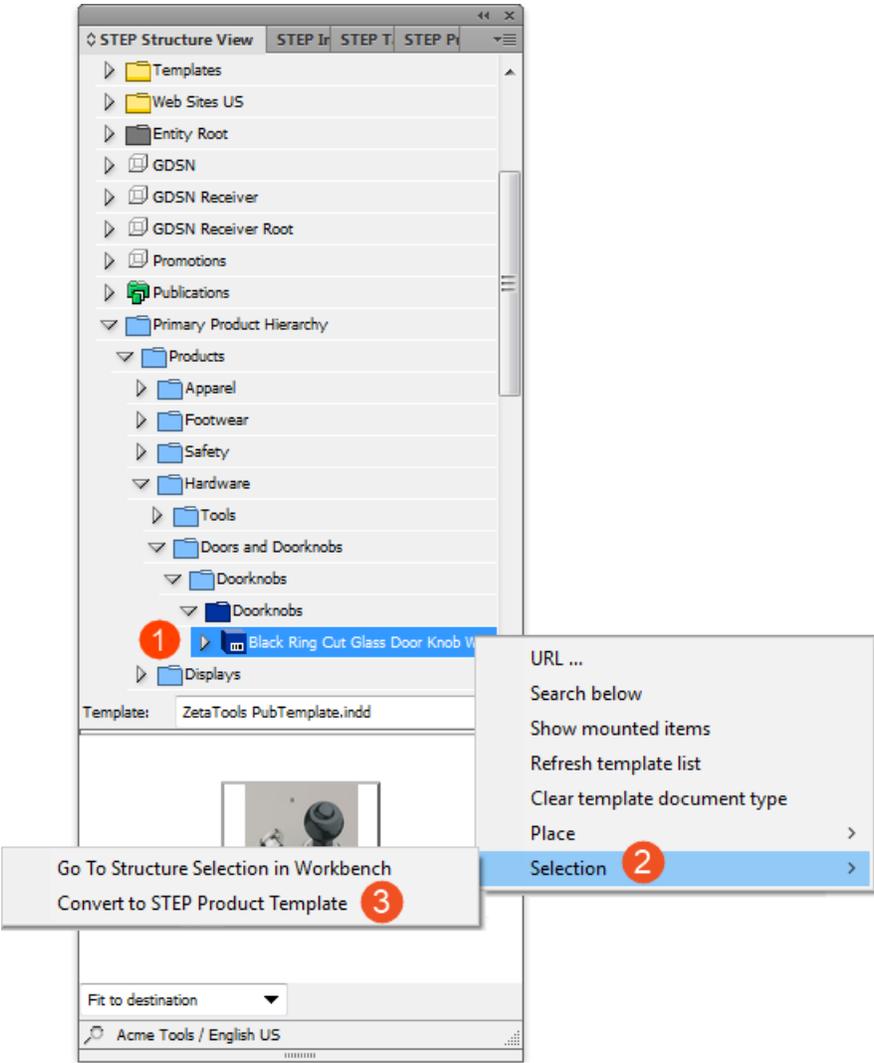
Long Item Description	abc	Shown in Nickel
		Price: £ 320.00 per pair
		Available in Nickel. Alternative finishes are not available due to glass composition. Single door knobs may be purchased at half the price per pair. Shown with smaller matching cupboard knob.
		Ref. DF • 5 • C

6. Product Group Description:

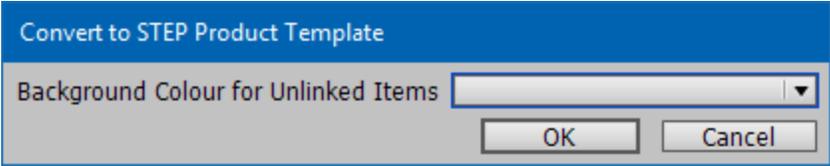
Name	Value
Product Group Description	<p>All items are handmade and specifications may vary slightly from those stated.</p> <p>Un-sprung turning door knob for use with sprung mortice latches. Supplied with spindles and screws as standard. Range of key hole escutcheons available. Conversion to fixed handle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

Steps to Convert the Sample Document to a Product Template

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



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



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

<STEPREF A="BrandName" />

<p style="color: red; font-size: 0.8em;">PrimaryProductImage</p>	<pre style="font-family: monospace; font-size: 0.8em; margin: 0;"> <STEPREF A="Manufactur- <STEPREF A="stibo.pseudoObject- Name" /> <STEPREF A="LongItemDescription" /> </pre> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="text-align: left;">Dimensions:</th> <th style="text-align: center;">In</th> <th style="text-align: center;">Cm</th> </tr> </thead> <tbody> <tr> <td>Backplate Diameter</td> <td style="text-align: center;">2.60</td> <td style="text-align: center;">6.60</td> </tr> <tr> <td>Protrusion</td> <td style="text-align: center;">4.00</td> <td style="text-align: center;">10.16</td> </tr> <tr> <td>Knob Diameter</td> <td style="text-align: center;">2.00</td> <td style="text-align: center;">5.08</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse; font-size: 0.8em; margin-top: 5px;"> <thead> <tr style="background-color: #f2f2f2;"> <th style="text-align: left;">Weight:</th> <th style="text-align: center;">lb</th> <th style="text-align: center;">Kg</th> </tr> </thead> <tbody> <tr> <td></td> <td style="text-align: center;">0.66</td> <td style="text-align: center;">0.30</td> </tr> </tbody> </table> <pre style="font-family: monospace; font-size: 0.8em; margin-top: 5px;"> <STEPREF A="ProductGroupDescription" /> </pre>	Dimensions:	In	Cm	Backplate Diameter	2.60	6.60	Protrusion	4.00	10.16	Knob Diameter	2.00	5.08	Weight:	lb	Kg		0.66	0.30
Dimensions:	In	Cm																	
Backplate Diameter	2.60	6.60																	
Protrusion	4.00	10.16																	
Knob Diameter	2.00	5.08																	
Weight:	lb	Kg																	
	0.66	0.30																	

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

When Page Content Cannot be Matched to STEP Content

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

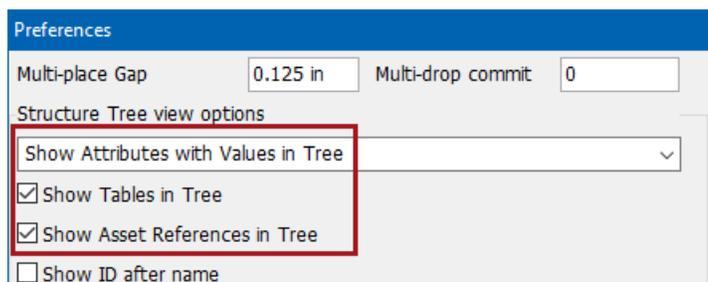
Note that, in the previous screenshot, the tables are shaded pink and have not been converted to STEP tags. Even if a STEP table exists on the product object and contains identical content to that of a table on the sample page, the table frames must be converted manually, as explained in the next section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

Method 2: Manually Converting Frames and Text to STEP Tags

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

- Attributes
- Tables
- Asset References

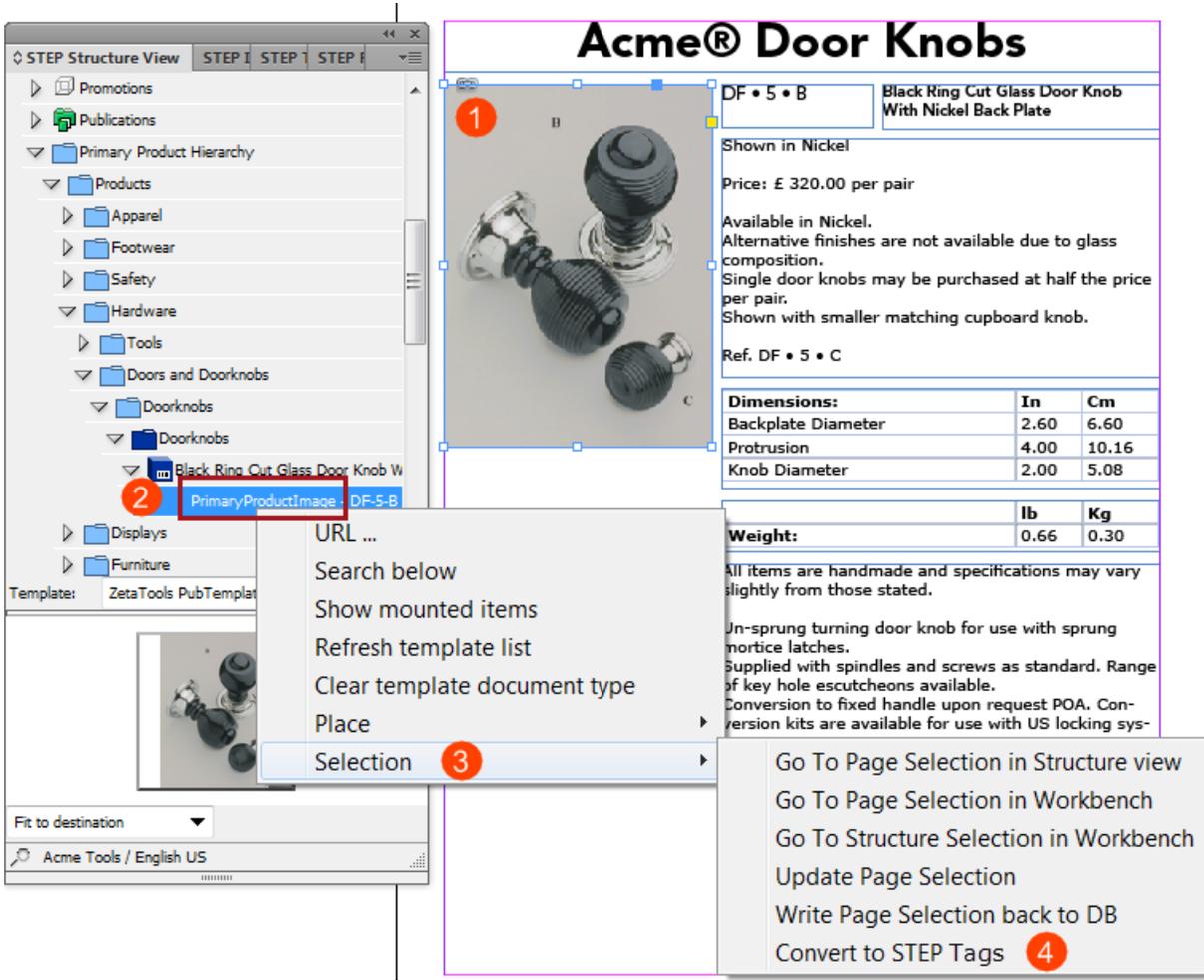
These options are selected in the 'Structure Tree view options' of the STEP **Preferences** menu. From the dropdown list, choose either 'Show all Attributes in Tree' or 'Show Attributes with Values in Tree.' Then, check the boxes for 'Show Tables in Tree' and 'Show Asset References in Tree.'



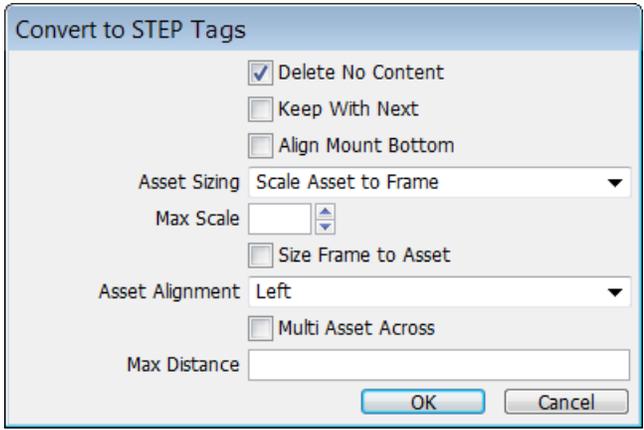
Converting Asset Frames

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

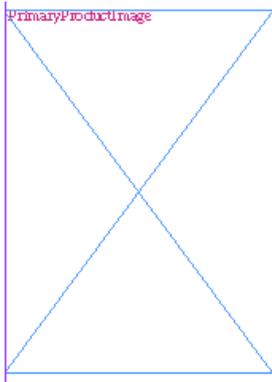
1. Select the relevant image frame on the sample document.
2. In the STEP Structure View, expand a product object (can be any product object) and select the desired asset reference type.
3. Right click the reference type, then click Selection > **Convert to STEP Tags**.



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



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



Converting Text Frames

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

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

The screenshot shows the 'STEP Structure View' window. On the left, a tree view is expanded to 'Doorknobs' > 'Black Ring Cut Glass Door Knob With Nickel Back'. A context menu is open over the 'Long Item Description' attribute, with 'Selection' > 'Convert to STEP Tags' highlighted. In the main text area, a text frame is selected, and a red circle '1' is placed over the text 'Shown in Nickel'. A red circle '2' is placed over the 'Long Item Description' attribute in the tree view. A red circle '3' is placed over the 'Selection' menu item, and a red circle '4' is placed over the 'Convert to STEP Tags' option. Below the text area, a table is visible:

Options:	In	Cm
Backplate Diameter	2.60	6.60
Knob Diameter	4.00	10.16
Knob Diameter	2.00	5.08

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

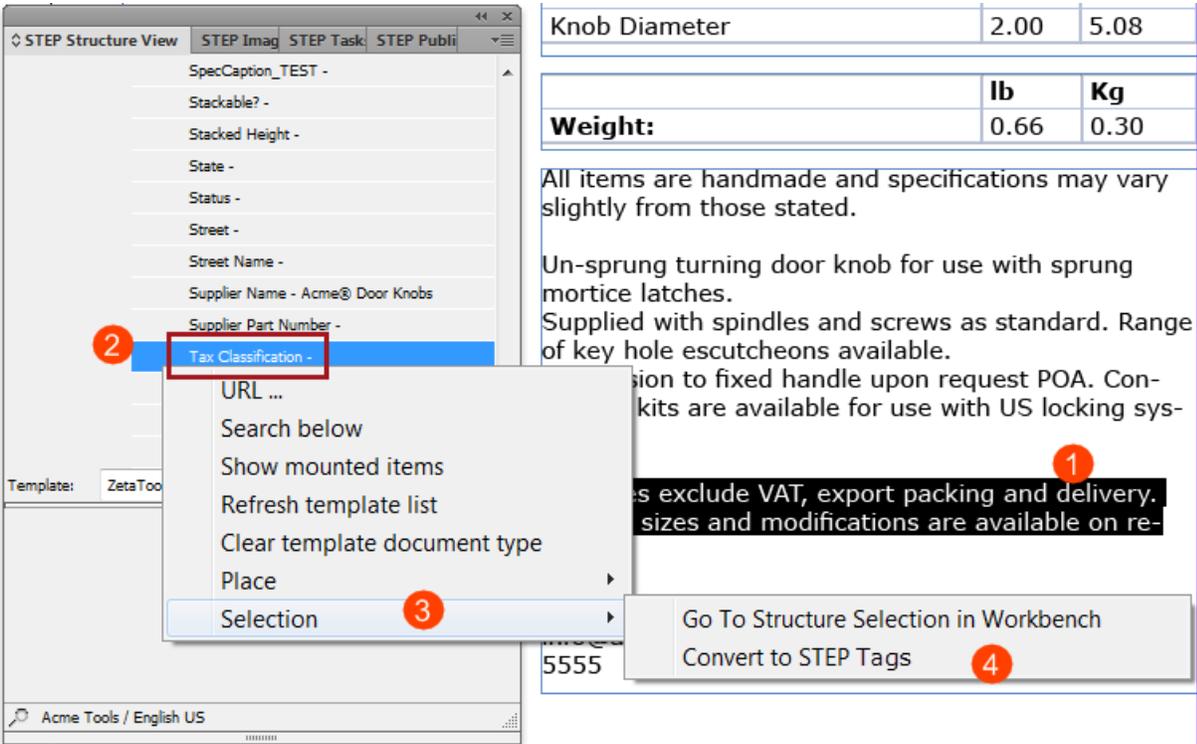
5. The original text is removed and replaced with the STEP tag for the attribute.

```
<STEPREF A="LongItemDescription" />
```

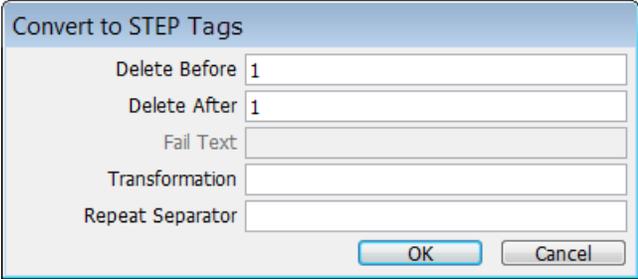
Converting Partial Text Within Frames

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

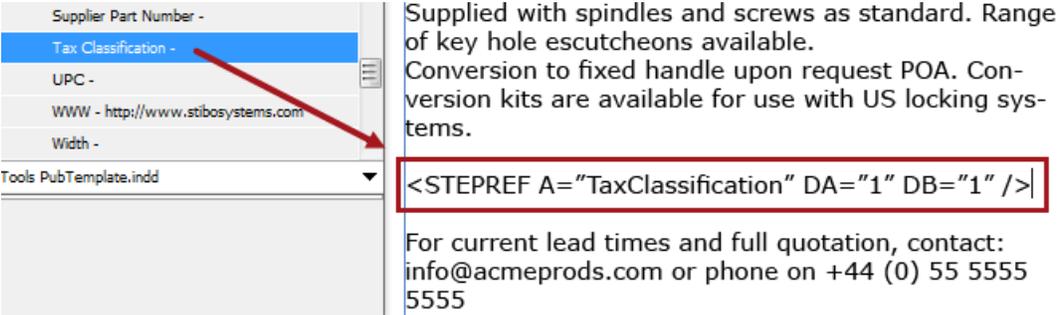
1. In a text frame, highlight the selection of text that you would like to convert to an attribute tag.
2. In the STEP Structure View, expand a product object (can be any product object) and select the relevant attribute.
3. Right-click the attribute and choose Selection > **Convert to STEP Tags**.



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



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



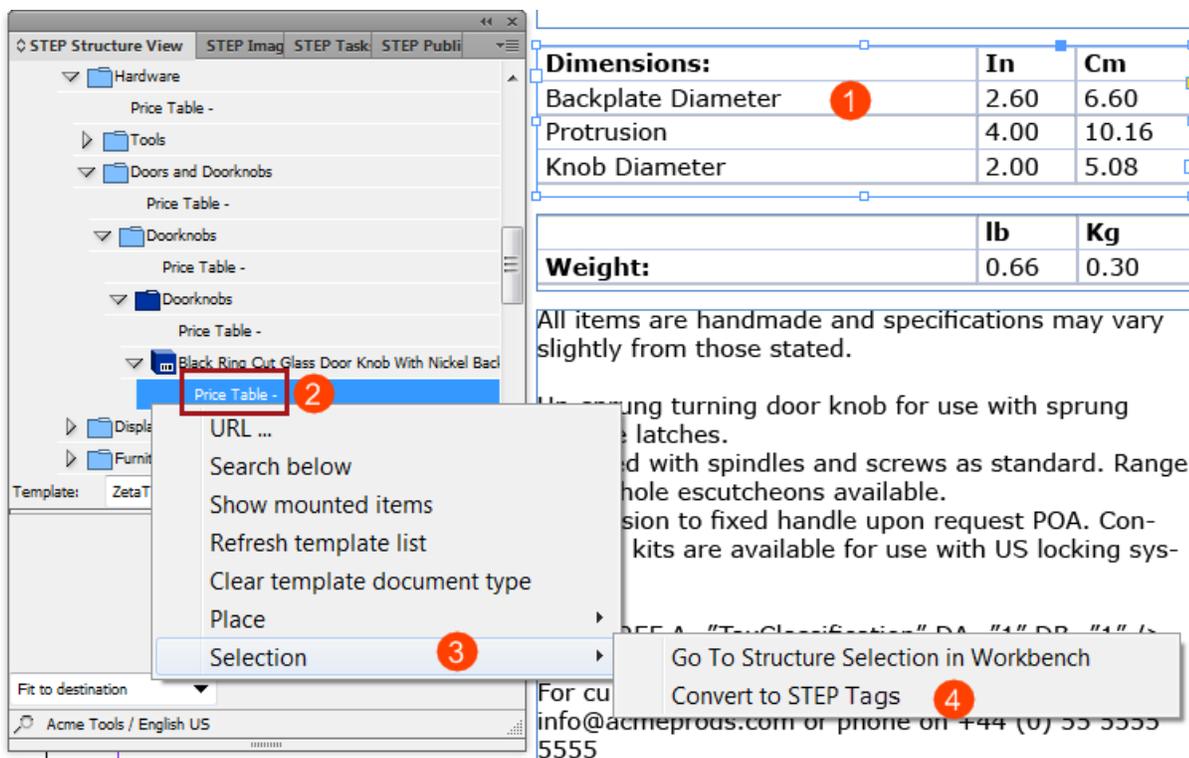
Converting Frames to STEP Table Tags

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

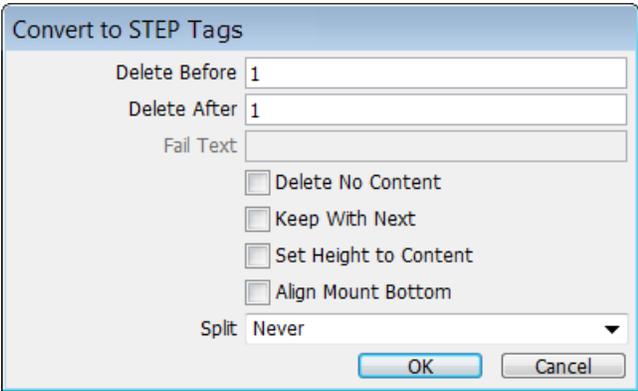
An entire text frame, or partial text within the frame, can be converted to a table tag. Note that a table tag can be placed in any text frame; the frame does not have to already contain a table.

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

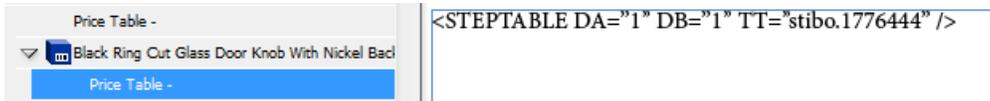
1. Select the relevant text frame or text on the sample document.
2. In the STEP Structure View, expand a product object (can be any product object) and select the desired table type.
3. Right-click the table tag and choose Selection > **Convert to STEP Tags**.



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

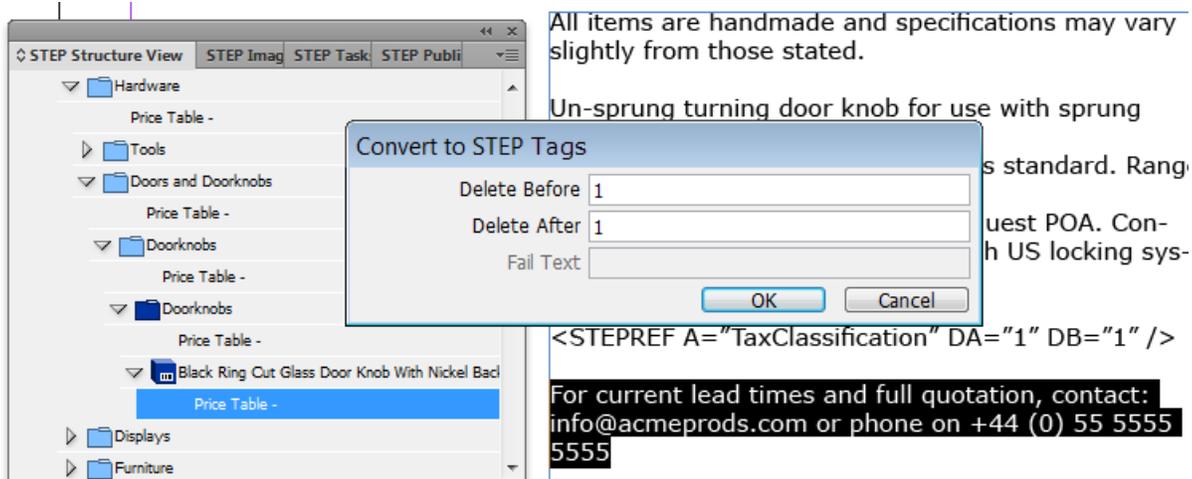


5. The original text is removed and replaced with the STEP table tag.

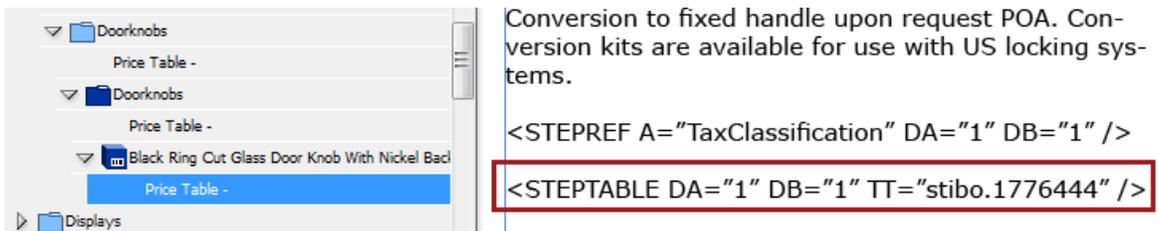


Converting Partial Text to a Table Tag

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

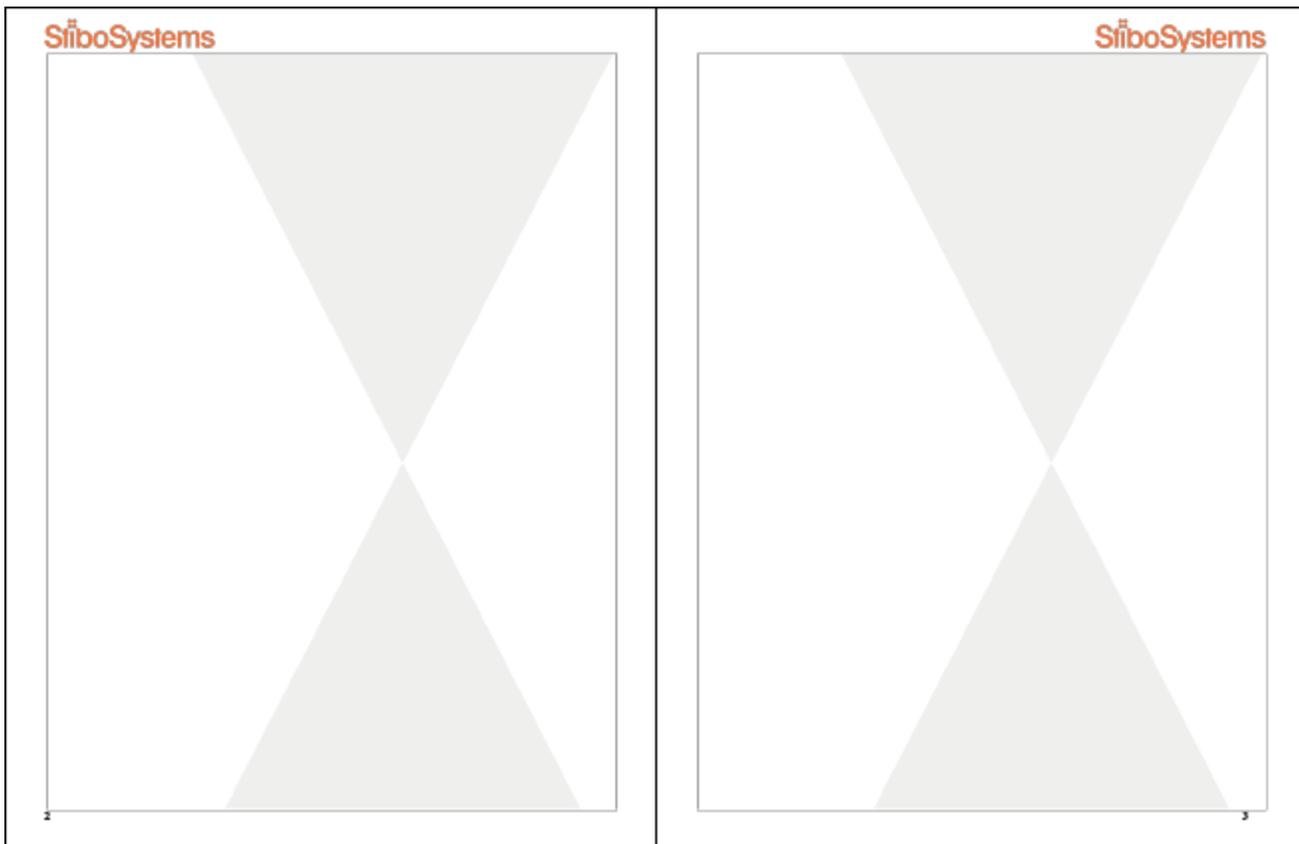


As with attributes, the selected text is removed and replaced with the table tag.



Publication Templates

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



Topics Covered in this Documentation Section

This documentation section addresses the following publication template topics:

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

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

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

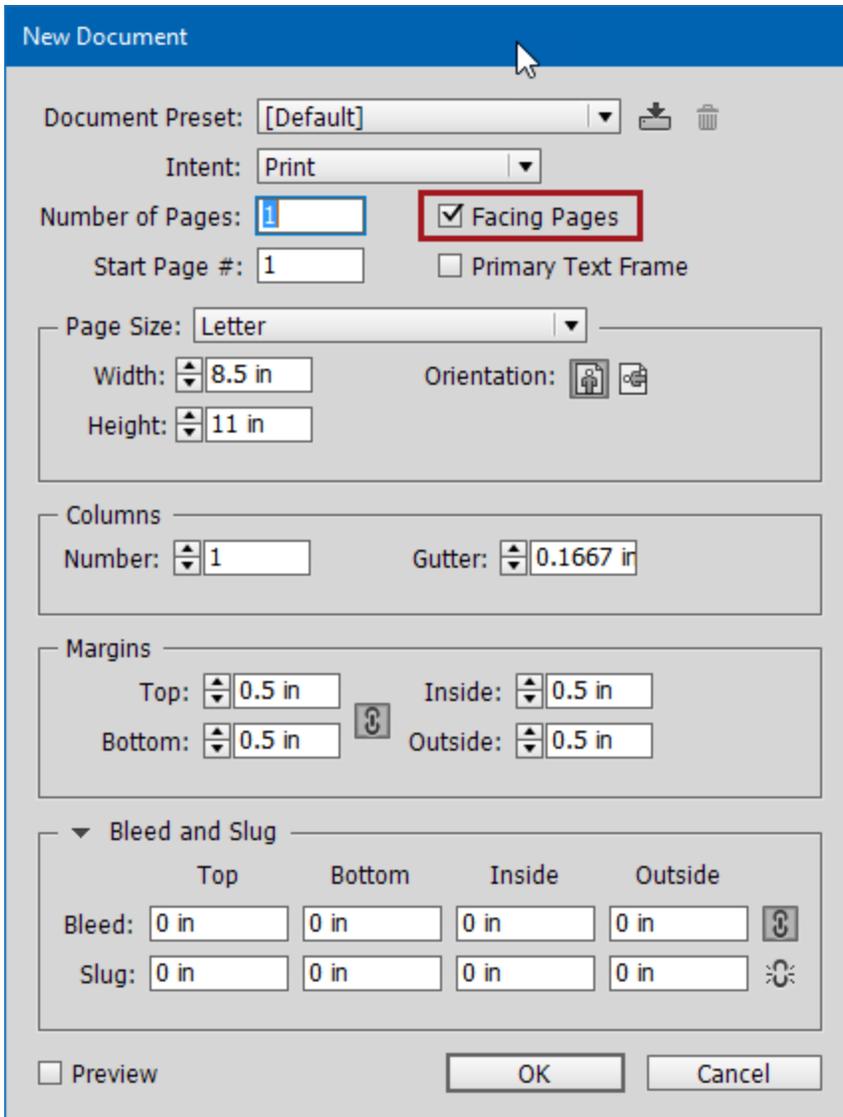
Note: Though objects other than products can be mounted onto InDesign pages from STEP (including classification folders, entities, and green publication hierarchy objects themselves), the subtopics in this documentation will refer to InDesign page layouts as 'product presentations.' This is to streamline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

Creating a Publication Template

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

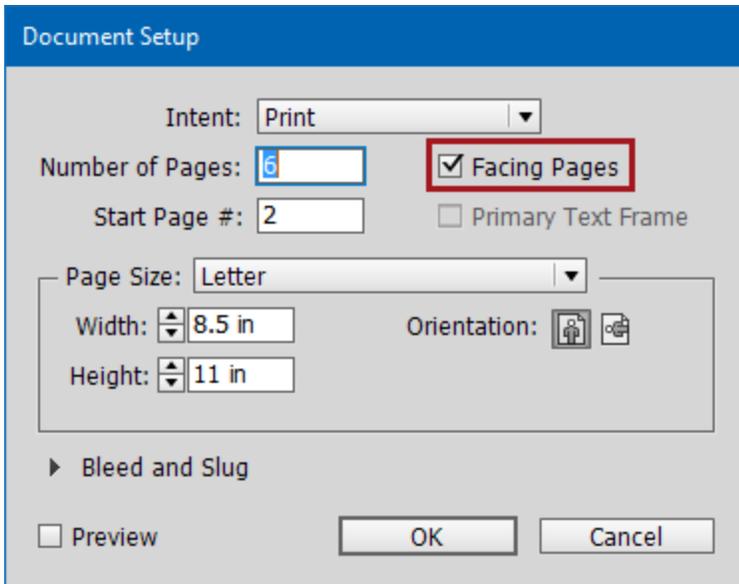
This topic explains how to create and configure a publication template from a blank InDesign file, as well as create a publication template from a previously existing master document. It does not describe how to use standard InDesign functionality such as adding page numbers to master pages, since this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

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



3. Check the **Facing Pages** check box to create a spread for the master page.

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

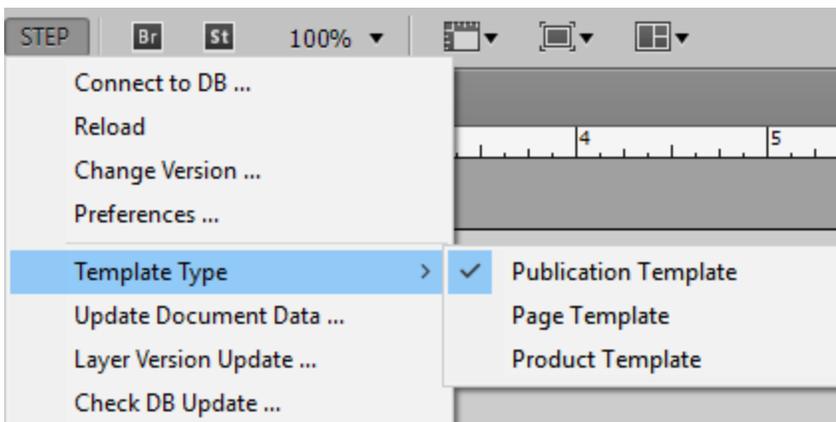


4. Click **OK** to finish creating the empty document.

Designating the Template Type

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

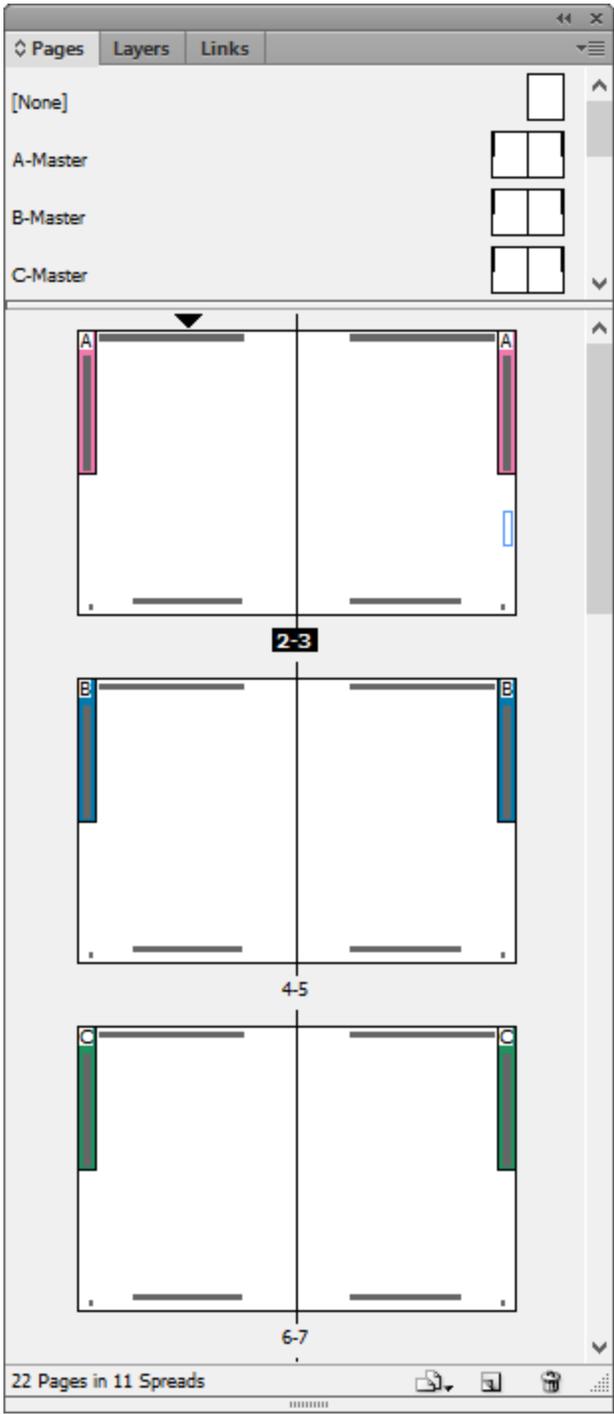
1. With your blank InDesign document open, Navigate to **STEP > Template Type**.
2. Select **Publication Template** from the STEP menu.



Master Pages and Spreads

A publication template can consist of one or many master pages and spreads. Many publications, especially large catalogs, need more than one master spread because each section may have, for example, different colored thumb tabs for each chapter. The following screenshot shows a publication template as viewed in the InDesign **Pages** panel. It contains three **master pages** (A-Master, B-Master, and C-Master) and three **spreads** based off of these master pages—pages 2-3 are created from A-Master, pages 4-5 are created from B-Master, and pages 6-7 are created from C-Master.

Note: Each page spread must only contain two pages.

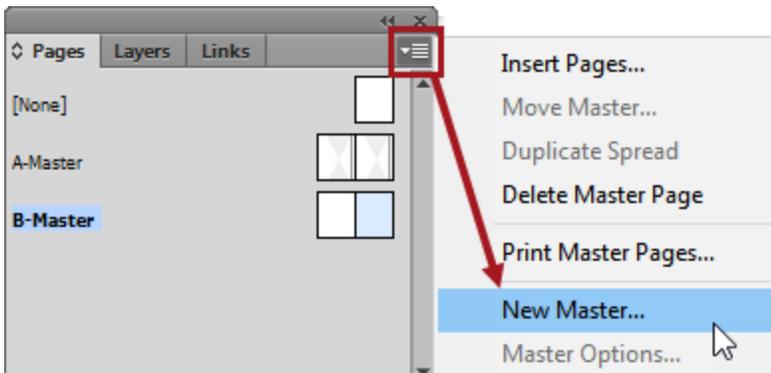


Page spreads must be created from the master pages because products can only be mounted on **pages**, not on master pages. For standard drag-and-drop mounting operations, users will drag products onto one of the page spreads and not a master page. For the AutoPage and Flatplanner components, these page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

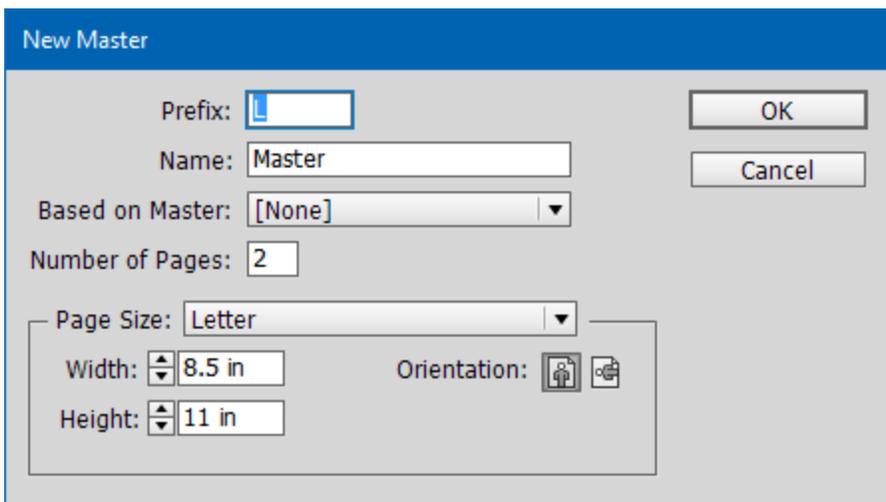
AutoPage, see **About Pagination Rules** in the **AutoPage** documentation. For more information about pagination rules in STEP Flatplanner, see **Pagination Rules for Flatplanner** in the **Flatplanner** documentation.

To create a new master page in InDesign:

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



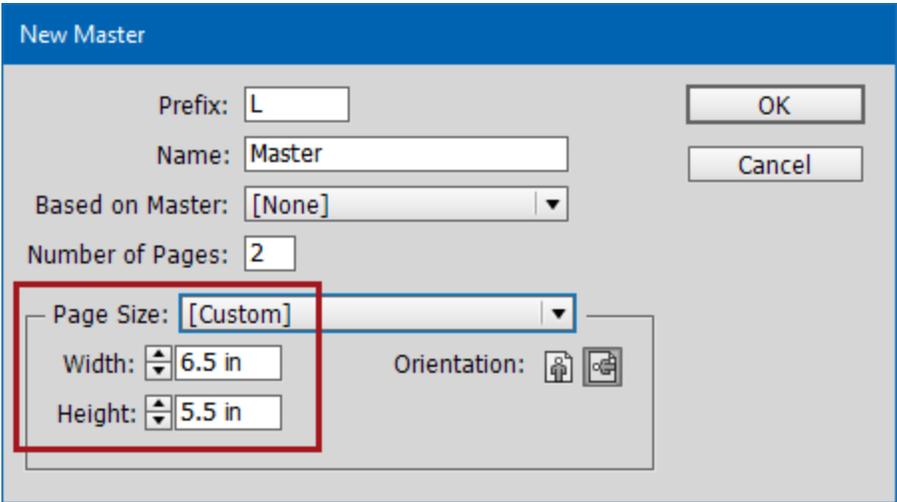
3. Configure your new master page on the **New Master** dialog, then click OK to complete.



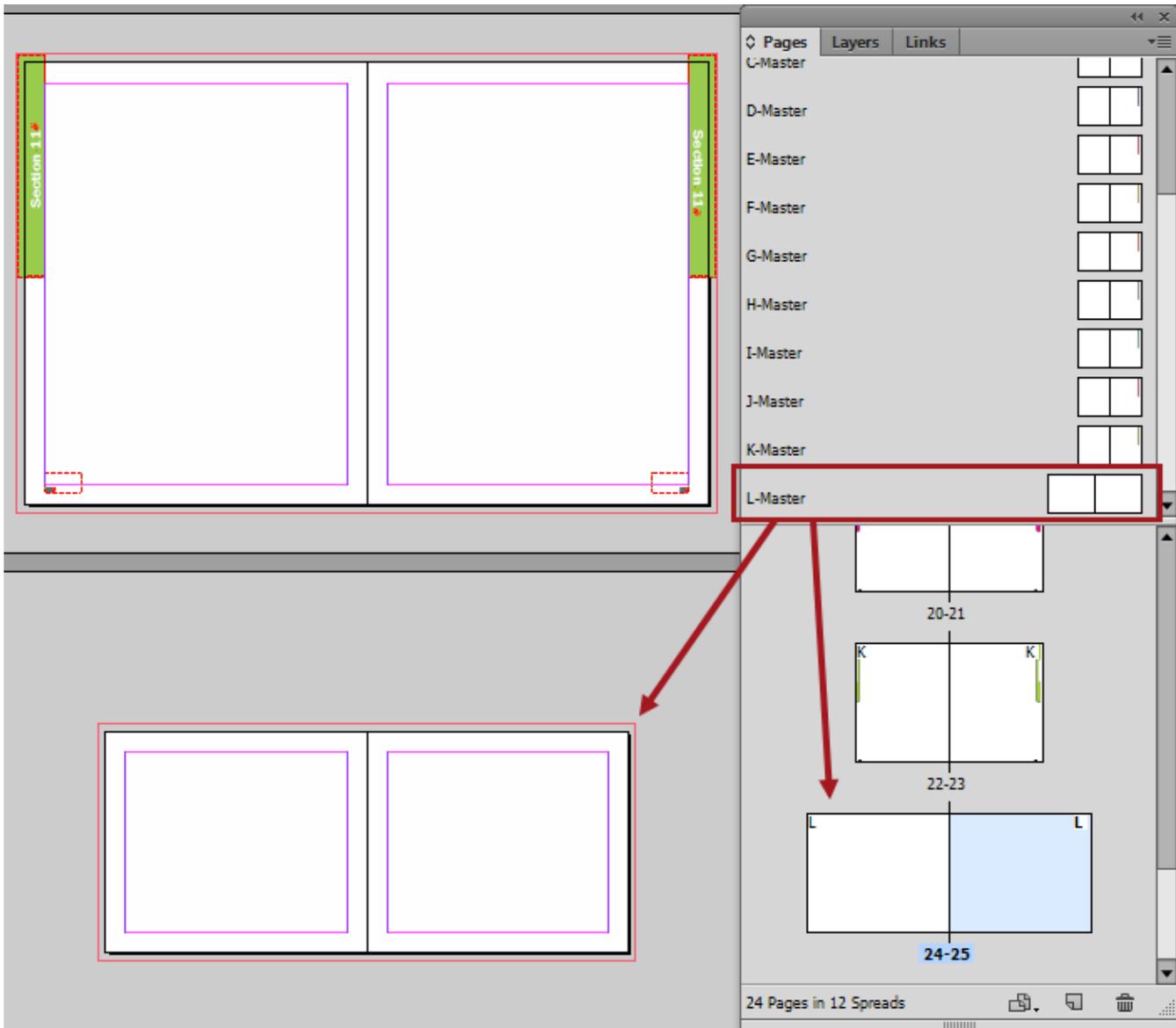
Master Pages of Different Sizes

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

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



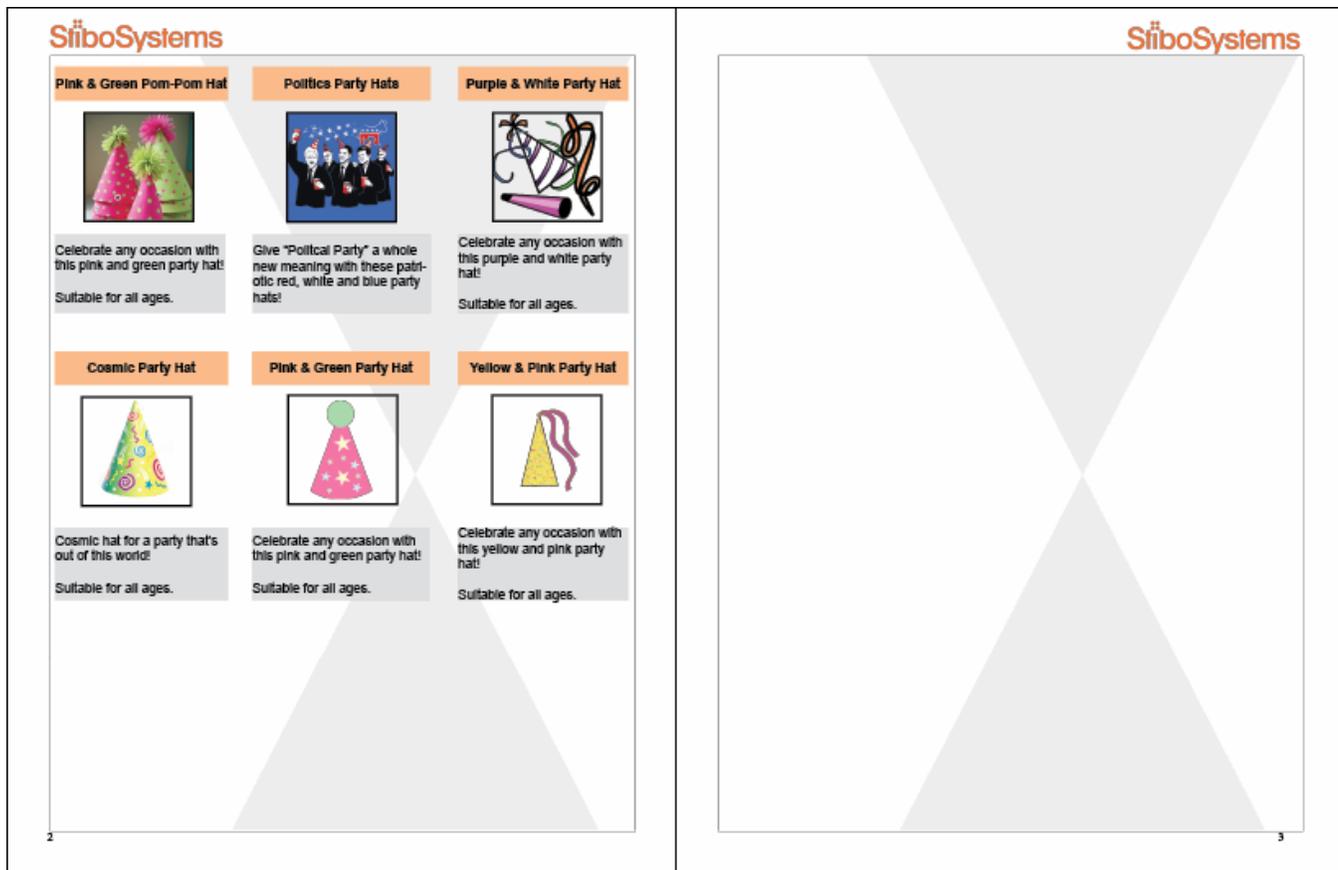
The following screenshot shows how a page created from a master page of a different page size looks alongside the other pages in the template. The InDesign **Pages** panel is on the right and the page spreads (viewed at a zoom level of 25%) are on the left.



Publication Template Layout, Formatting, and Styles

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

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



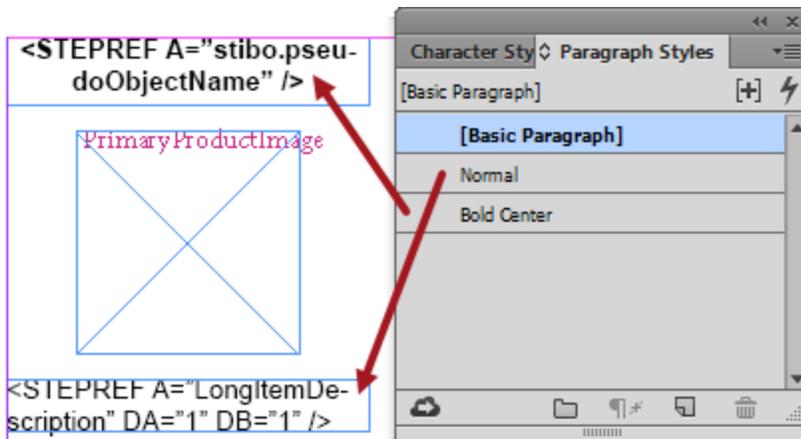
This topic focuses on the following subjects specific to configuring a publication template for use with STEP'n'design:

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

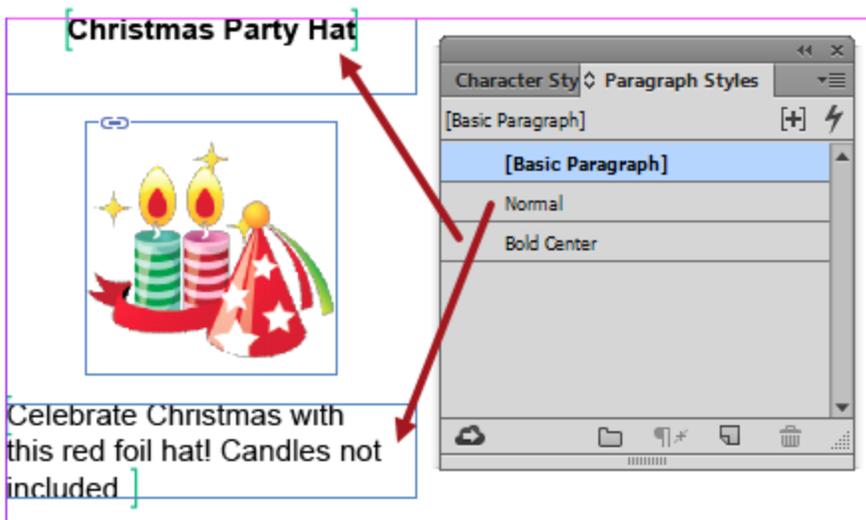
Paragraph Styles in Publication Templates

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

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

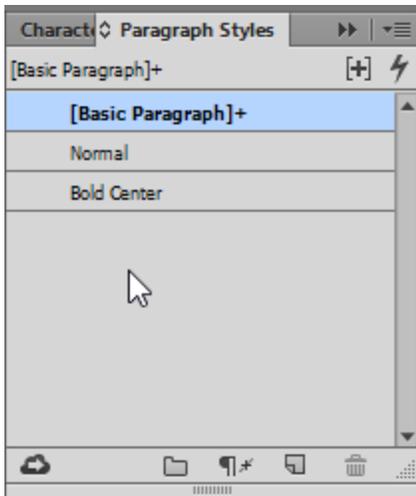


The following screenshot shows how a product mounted using this product template looks on a **publication** template containing the same styles.



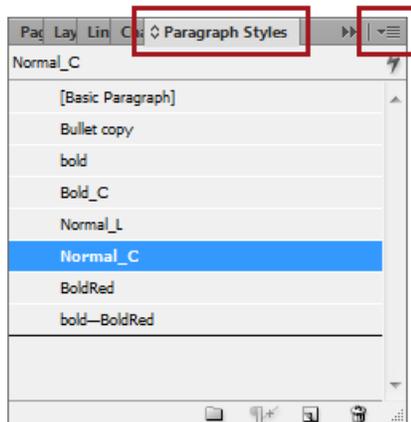
Note: Best practice is for publication templates to contain the identical paragraph styles that are used in the product templates associated with the publication. It is possible to mount styled pages without using paragraph styles, but this is not recommended because you will not be able to globally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

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

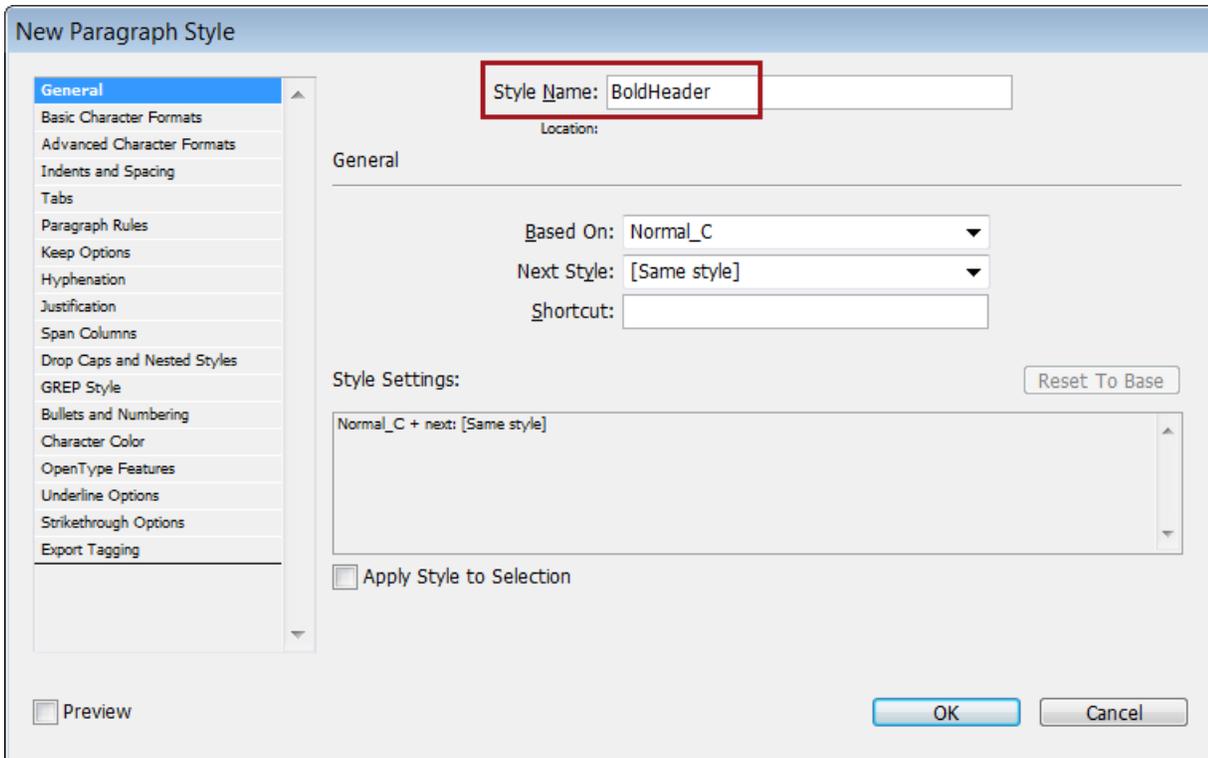


Creating a Paragraph Style in InDesign

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



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



Character Styles in Publication Templates

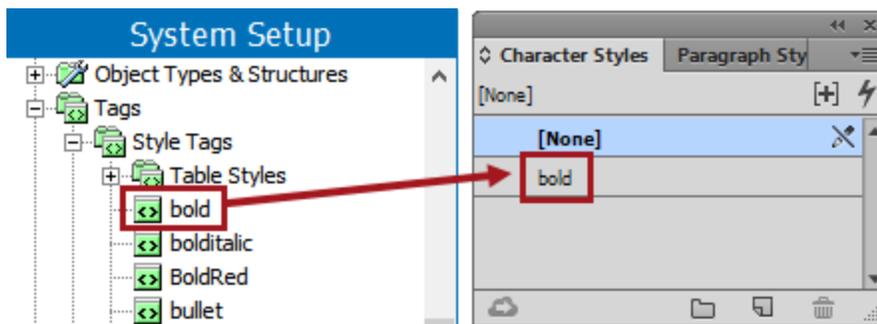
InDesign **character styles** are used in conjunction with STEP **style tags** to apply formatting to characters embedded *within* paragraph styles. For example, a STEP style tag can be used with a corresponding InDesign character style to bold a single word inside of a non-bold sentence.

Note: This topic does not explain how to create a style tag in STEP; only how to use pre-made style tags in conjunction with InDesign character styles. For instructions on how to create and configure style tags in the STEP Workbench, see **Creating Tags** in the **System Setup / Super User Guide** documentation.

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



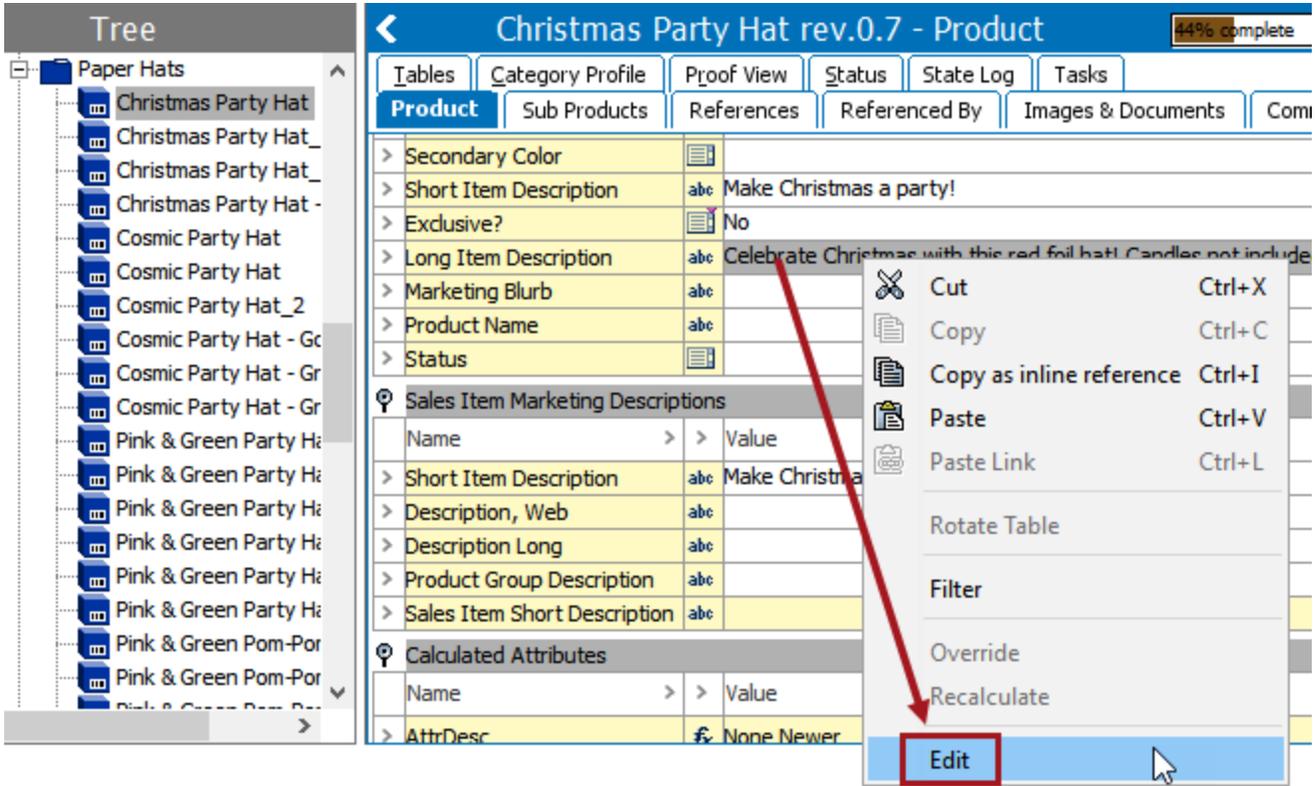
This is picked up from the bold **style tag** created in STEP (left) and applied with the bold **character style** in InDesign (right)



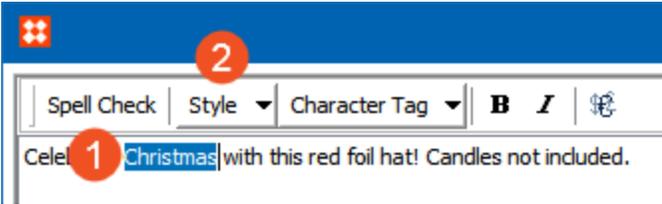
Note: STEP style tags are case-sensitive; therefore, the name of the style tag in STEP and the character style in InDesign must match exactly.

To apply this style in STEP, using a product object as an example:

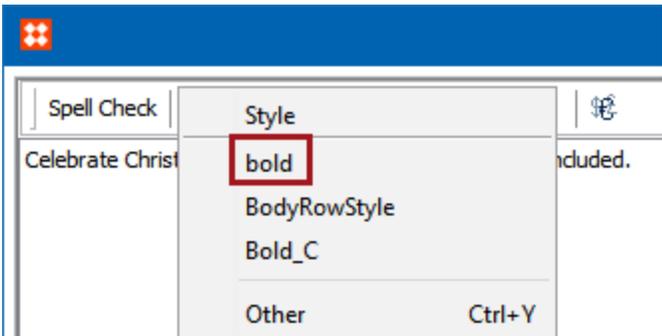
1. On the **Product** tab, navigate to the attribute value that you want to edit and select the attribute value field.
2. Right click and select **Edit** to open the large value editor for the cell.



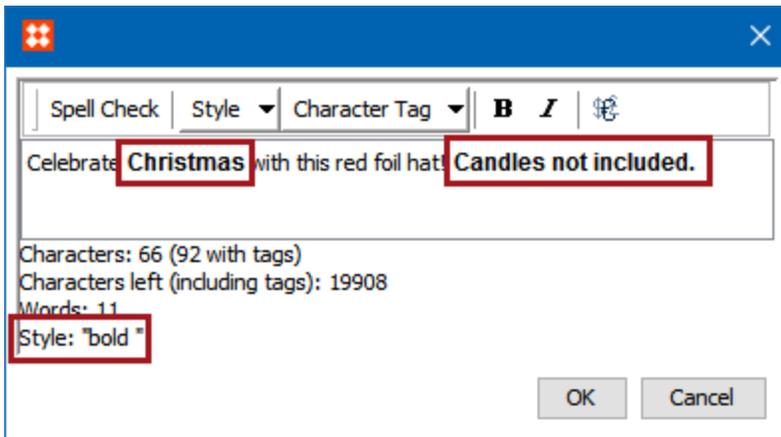
3. In the value editor, highlight the word(s) to which you would like to apply a style, then click the **Style** button.



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



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



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

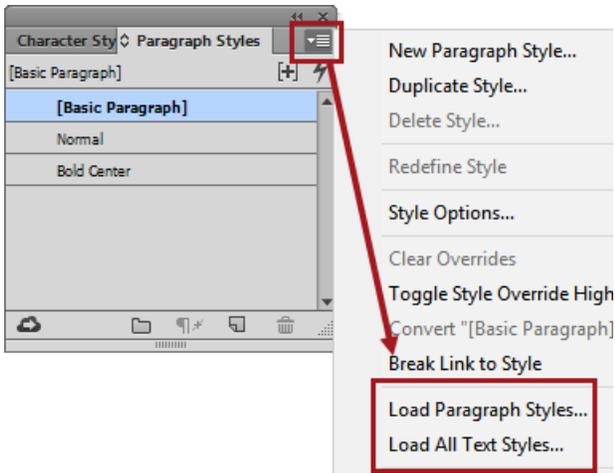
Note: Style tags are not created in STEP for InDesign *paragraph* styles used in standard text frames. STEP style tags are only used with InDesign *character* styles and for text that appears within STEP tables. See the **Configuring Table Styles in Publication Templates** topic for more information.

Loading Text Styles From Another Template

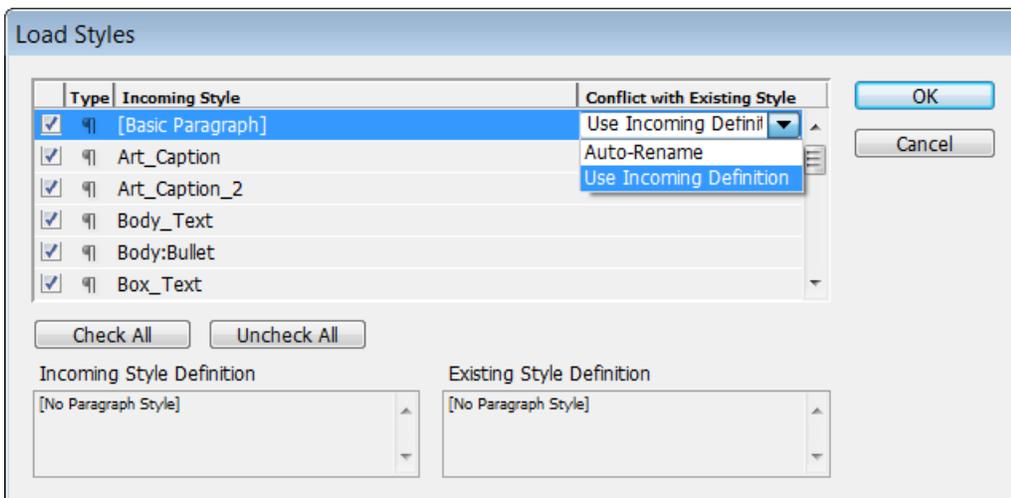
If paragraph styles have already been defined in another InDesign document, these styles may be imported from the other document in order to save time when setting up your publication template. The other InDesign document does not need to be a publication template that was created using STEP'n'design;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

To load text styles from another InDesign document:

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



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



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

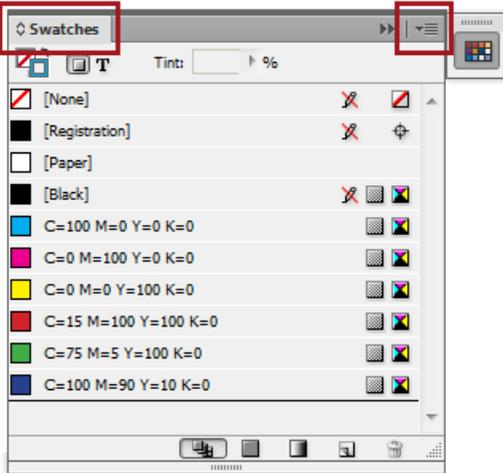
Choose **Auto-Rename** from the dropdown if you do not want to overwrite the existing style. Choose **Use Incoming Definition** if you want to overwrite the existing style and use the imported style.

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

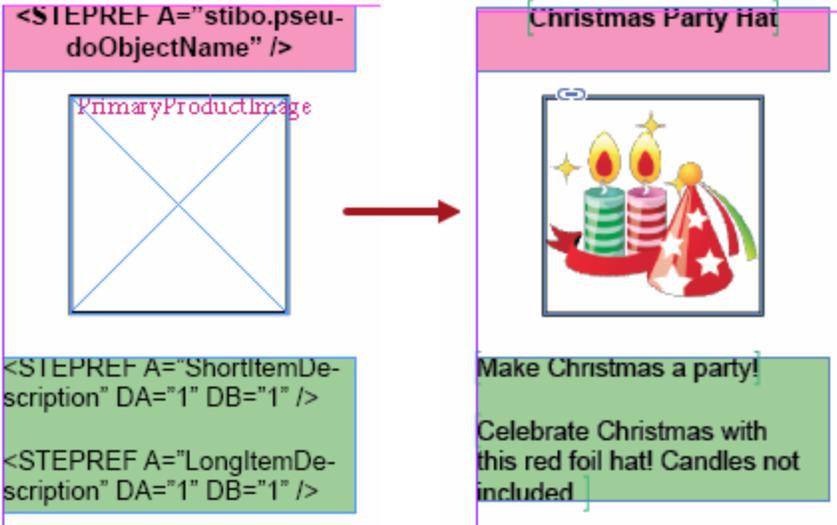
Swatches in Publication Templates

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

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



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



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

Configuring Table Styles in Publication Templates

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

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

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

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

Example of a Styled Table in STEP

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

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

Definition **Preview**

Select version Acme Party Supplies/English US Select Preview Node

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

Transformation Parameters

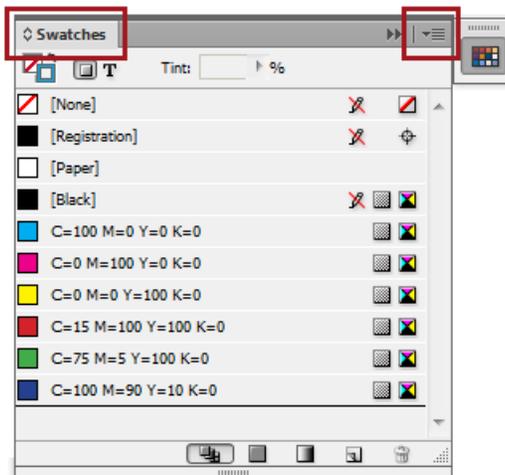
Alternate Row Colors Color 1 rows "White" then 1 "Light Blue". Restart count after...

[Add Transformation](#)

Configuring Table Colors in InDesign

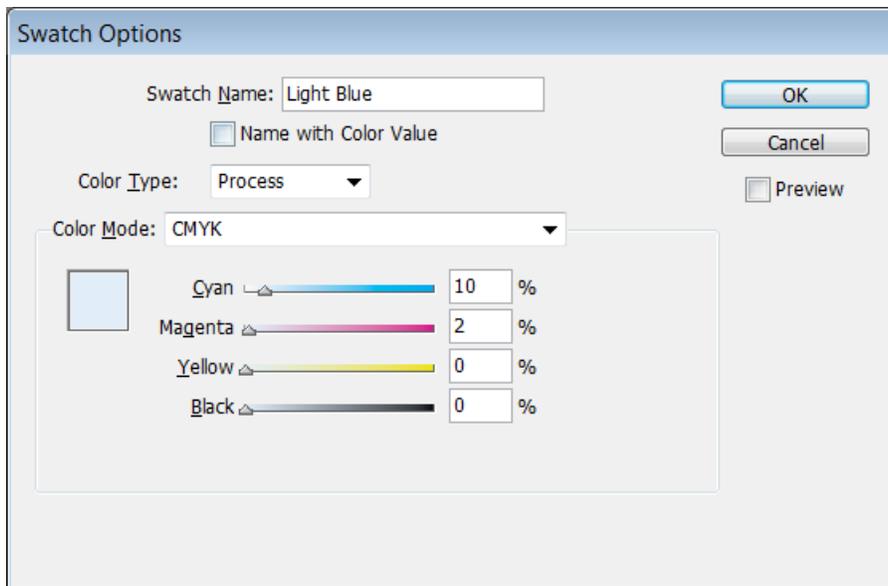
Colors defined in STEP are configured in InDesign as **Swatches**, as follows:

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



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

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



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

Loading Swatches From Another InDesign Document

To load swatches from another InDesign document:

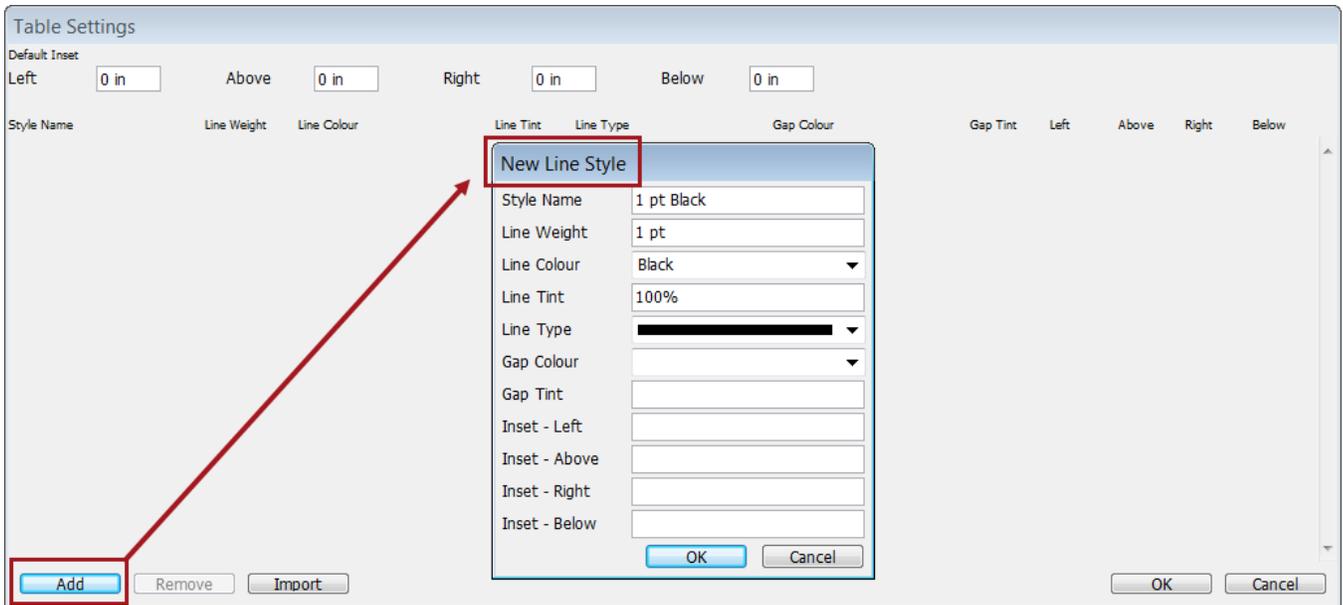
1. In the **Swatches** panel, click the **Options** menu, and then click **Load Swatches**. An **Open a File** dialog box displays.
2. Navigate to the InDesign file that contains the swatches that you would like to import, then click **Open**. (This file does not have to be another publication template;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

Configuring Table Line Styles in InDesign

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

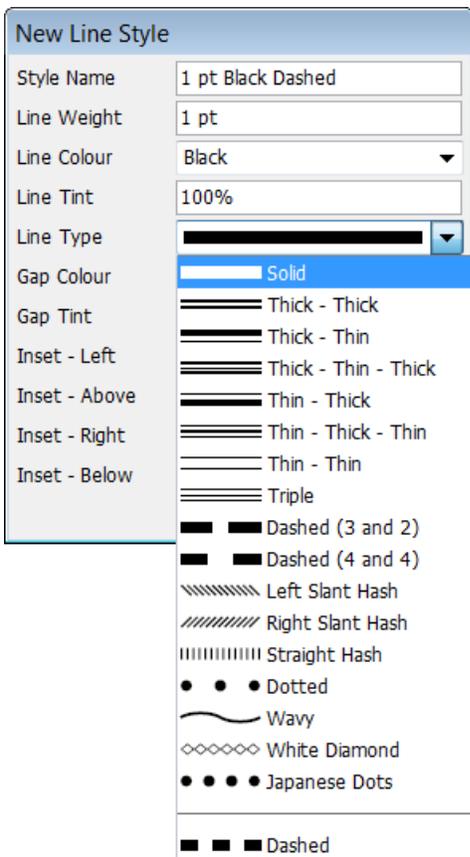
To create line styles in the InDesign publication template:

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



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

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



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

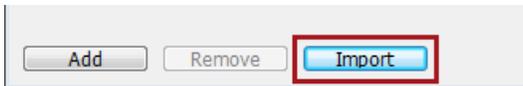
Note: If you would like no inset padding at all, enter a hairline space value of .0001. The system will recognize this value as being so close to 0 that there will be no visible inset padding.

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

Loading Table Line Styles From Another InDesign Document

To load table line styles from another InDesign document:

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

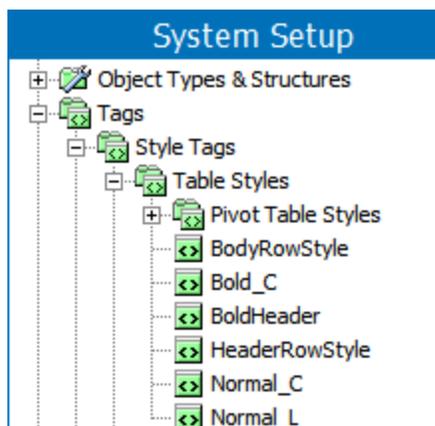


2. An **Open a File** dialog box displays. Locate the InDesign publication template containing the line styles that you would like to import, then click **Open**.
3. The line styles from the selected InDesign file will automatically import.
4. Click **OK** to complete.

Configuring Paragraph Styles for Tables in InDesign

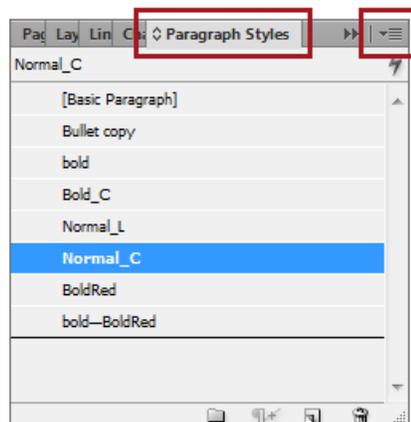
Style tags created in STEP and applied to tables are configured as **paragraph styles** in InDesign.

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

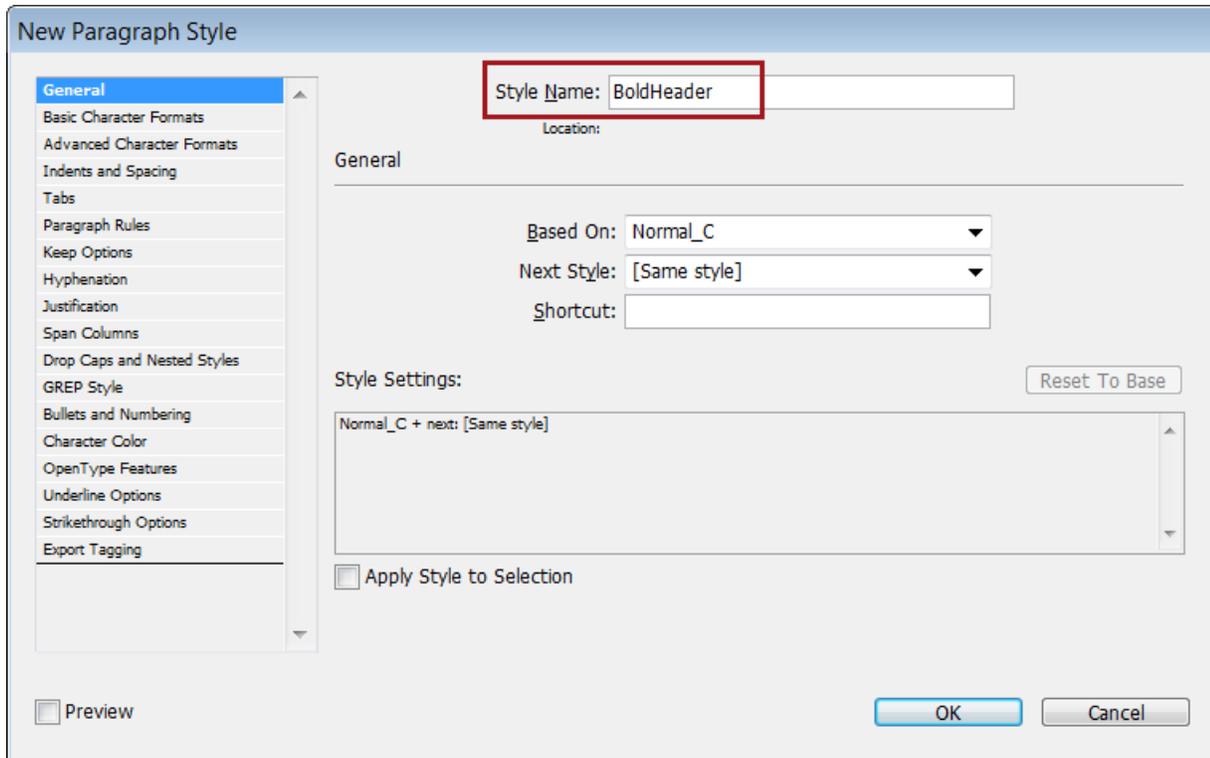


To create a paragraph style in InDesign:

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



2. Click the **Options** menu in the upper right corner of the **Paragraph Styles** panel, then click **New Paragraph Style**.
3. On the **New Paragraph Style** dialog, enter a **Style Name** that exactly matches the corresponding style tag in STEP.

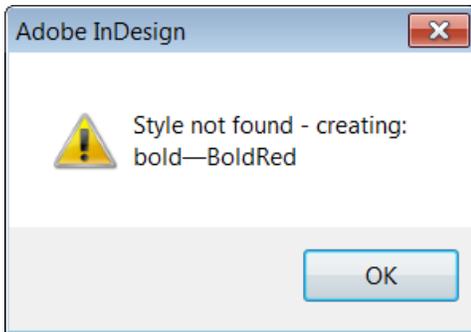


4. Continue configuring the paragraph style as needed, then click **OK** to complete.

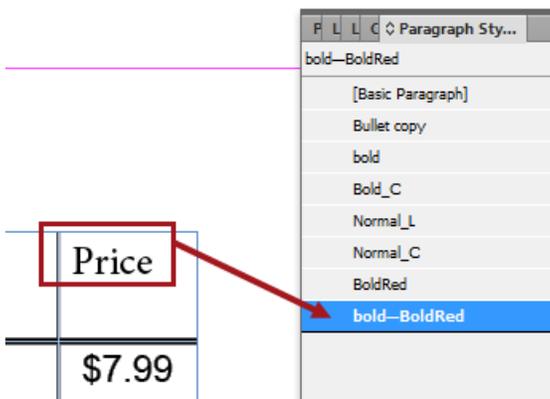
Merge of Row / Column Style Names

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

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



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



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

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

Storing and Editing Publication Templates

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

Storing Publication Templates Locally

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

Storing Publication Templates in STEP

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

- At least one publication template must exist in STEP in order to create a publication. (The exception to this is if you create a publication by using a Publication Excel import. However, the publication cannot be used until

a publication template is linked to it, as the Publication Excel import merely creates the publication *structure*. See **Importing Publications in Excel** for more information.)

- Templates stored in STEP can be opened and edited by any user who has access to the same STEP environment, in essence treating STEP as a 'cloud' storage solution.
- Publication templates must be stored in STEP in order to utilize Proof View functionality.
- Publication templates must be stored in STEP in order to use the Flatplanner and AutoPage components.
- Publication templates must be stored in STEP in order to create Flatplanner **page templates** in the workbench

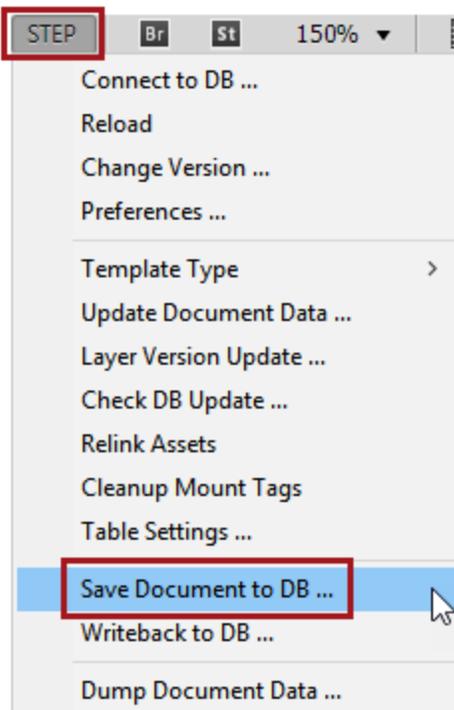
Note: For users who only use 'drag-and-drop' functionality to build InDesign pages, a 'dummy' publication template may be saved to a publication in STEP instead of the actual 'mounting page.' This 'dummy' template (which may be a blank page with no graphical elements) can be used solely to generate proof views in the workbench, while actual pages are built in the InDesign client by dragging and dropping products onto the more fully developed mounting page.

To store a publication template in STEP:

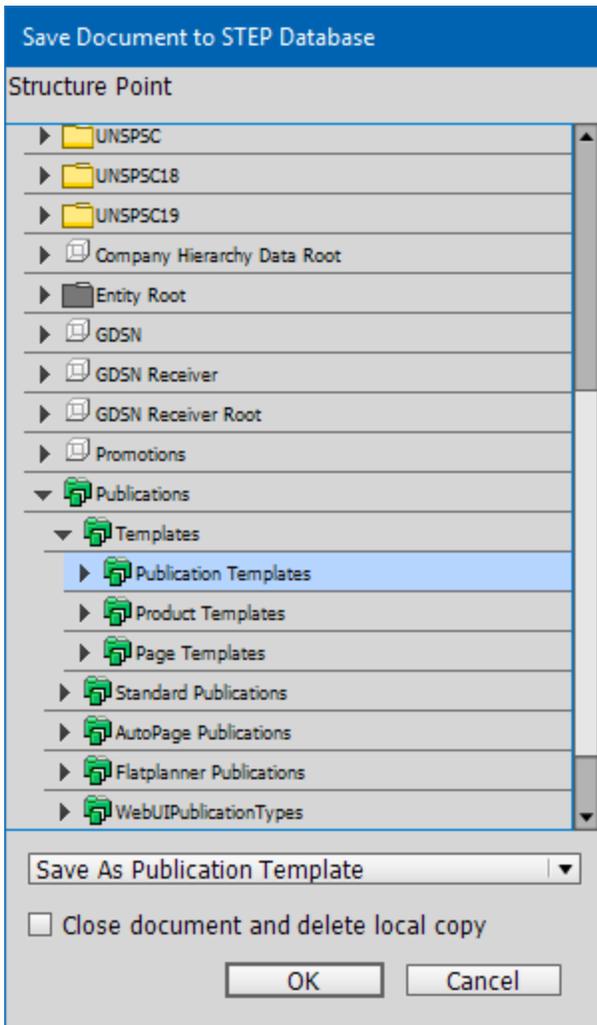
1. Save the publication template on your local hard drive as a standard InDesign file.

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

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



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



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

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

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

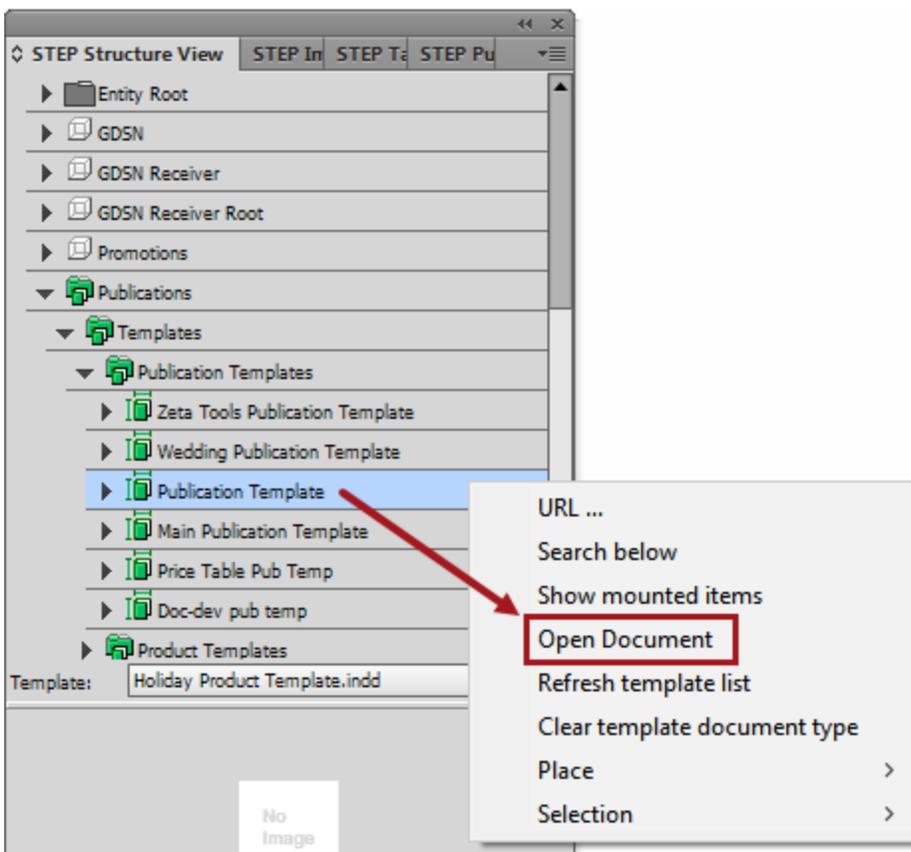
5. Choose **Save as Publication Template** from the dropdown list near the bottom of the dialog.
6. Check the **Close document and delete local copy** box to delete the local copy of your template once you save it to STEP.
7. Click **OK**. The publication template is saved in STEP.

Opening and Editing Publication Templates

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

To open and edit a publication template:

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



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

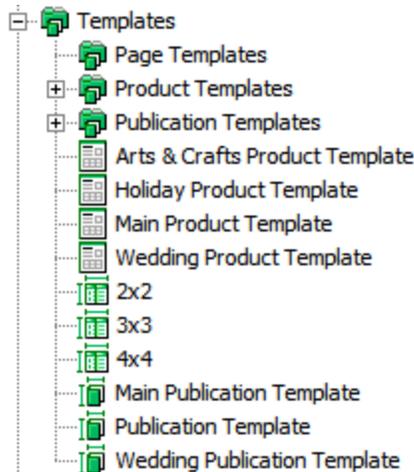
Sorting Templates in STEP

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

Automatic Sorting

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

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



Manual Sorting

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

The screenshot shows the 'System Setup' interface. On the left, a tree view shows 'Publication group types' selected. On the right, a table displays the details for this object type. The 'ID' field is set to 'Publication group root' and the 'Manually Sorted' field is set to 'Yes'. A red arrow points from the selected item in the left pane to the 'ID' field in the right pane.

Object Type	References	Log
Description		
Name	>	> Value
ID	>	Publication group root
Name	>	Publication group types
Last edited by	>	2015-10-09 16:49:26 by USER
Name Pattern	>	
ID Pattern	>	[id]
Manually Sorted	>	Yes
Icon	>	

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

The screenshot shows a tree view of the 'Templates' folder. The templates listed are: Main Product Template, Wedding Product Template, Holiday Product Template, Arts & Crafts Product Template, 3x3, 2x2, 4x4, Wedding Publication Template, Main Publication Template, and Publication Template.

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

Mounting Products

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

This topic does not explain:

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

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

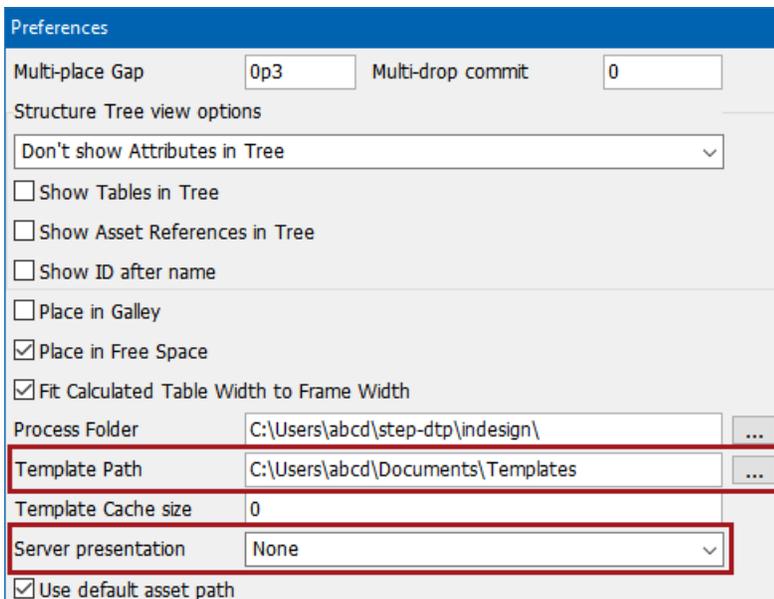
This topic assumes that:

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

Setting Product Template Preferences in the STEP Preferences Menu

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

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

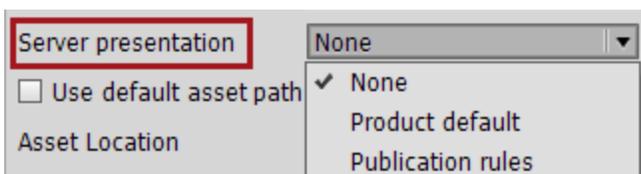


To set these preferences, follow these steps:

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

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

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



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

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

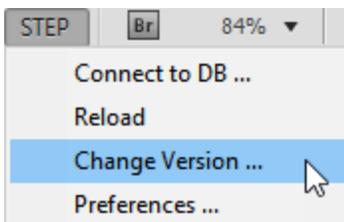
- **Publication rules:** Choose this to mount products using the product template specified by the Object Layout pagination rules in STEP.

Choosing a Version

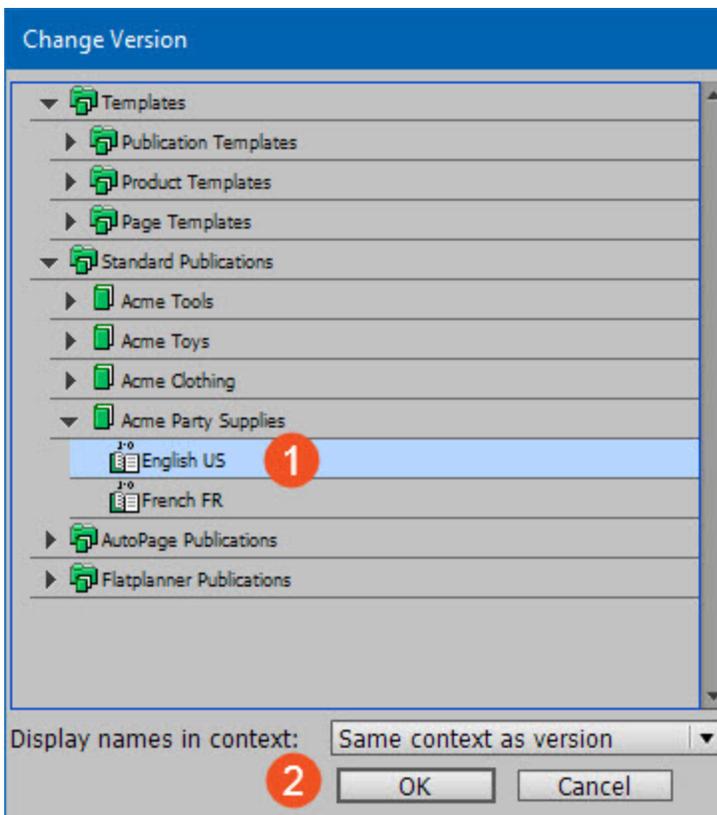
Before mounting a product, you must always designate from what publication **version** you will be mounting data. This is important because the system needs to know not only what publication you are building but from what context and workspace the product data should be pulled. You can either make a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

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

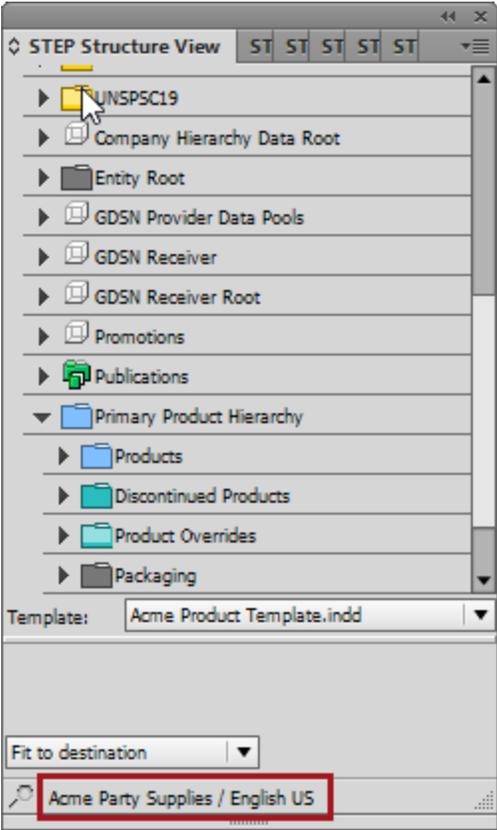
1. In InDesign, Navigate to STEP > **Change Version ...**



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



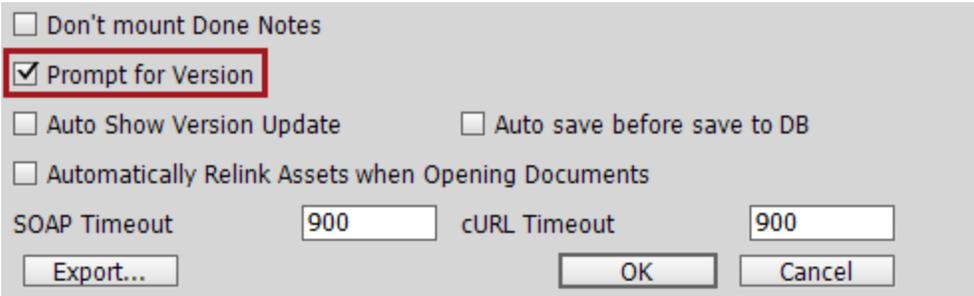
3. The selected version displays at the bottom of the STEP Structure View.



Prompt for Version

To have STEP'n'design prompt for a version every time you mount a product:

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

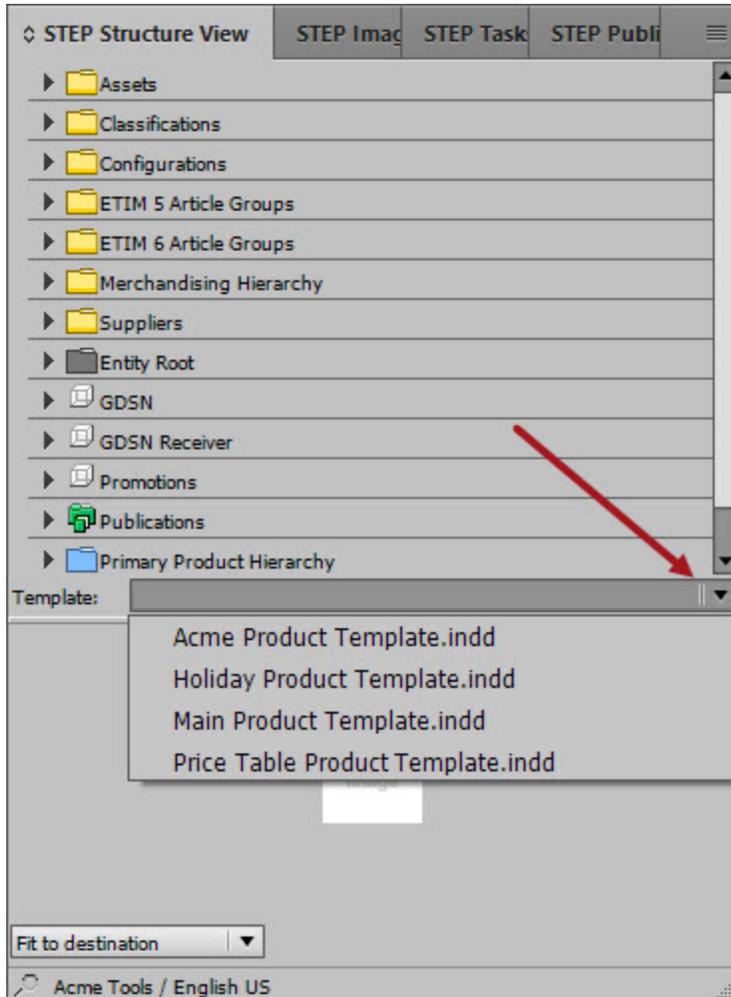


Mounting the Product(s)

- 1. Open the STEP Structure View palette by navigating to Window > **STEP Structure View**.

2. If using locally stored product templates, select the product template that you would like to use from the **Template** list at the bottom of the palette.

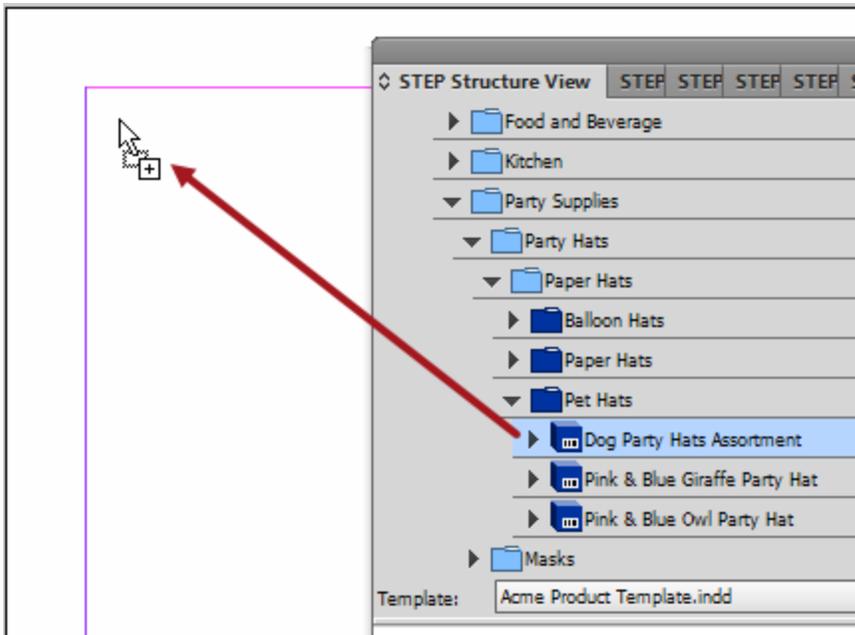
Note: The product templates in the dropdown list are the templates stored in the **Template Path** folder designated in the STEP Preferences menu.



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

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

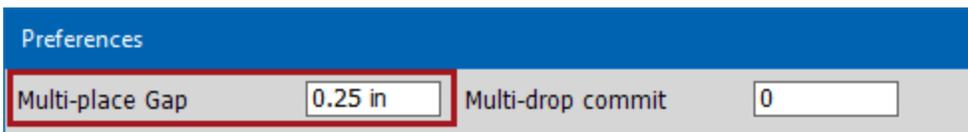
4. Select the object, then hold down the left button of your mouse while you drag it to the desired location on the page.



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

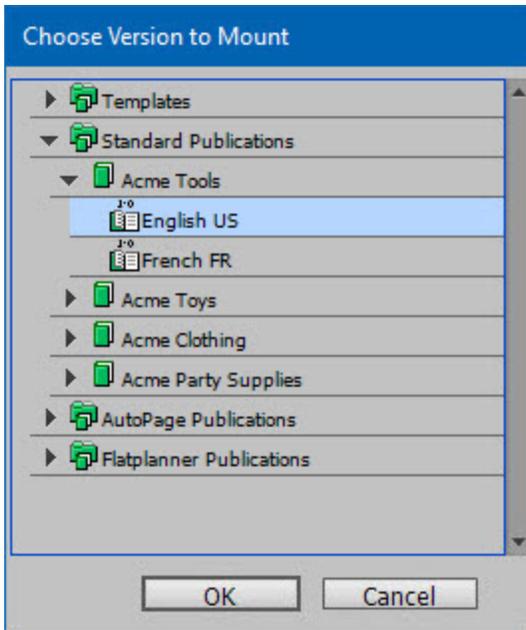
Note: Your multi-selection must be within the same classification or product family.

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

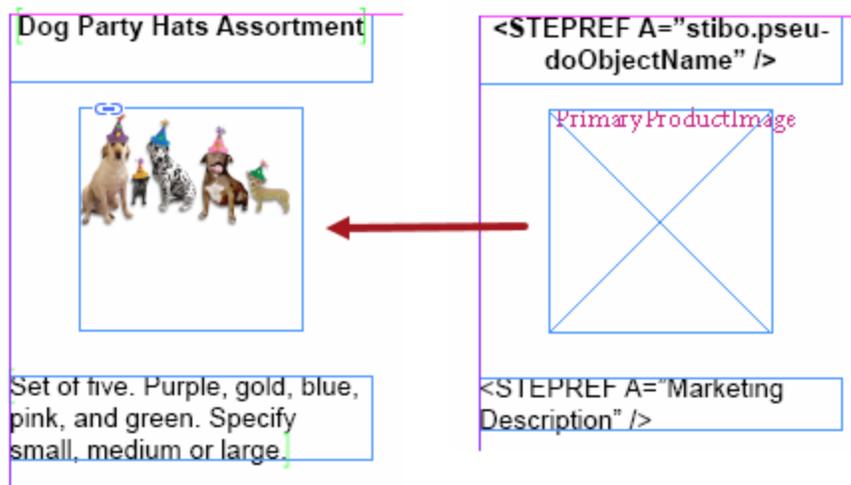


If the product data exceeds the available space on the column or page or column, STEP'n'design can be configured to flow the data into next column or page by splitting a frame, or group of frames, across the column or page. These split settings are applied to product template frames on the STEP Template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

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



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



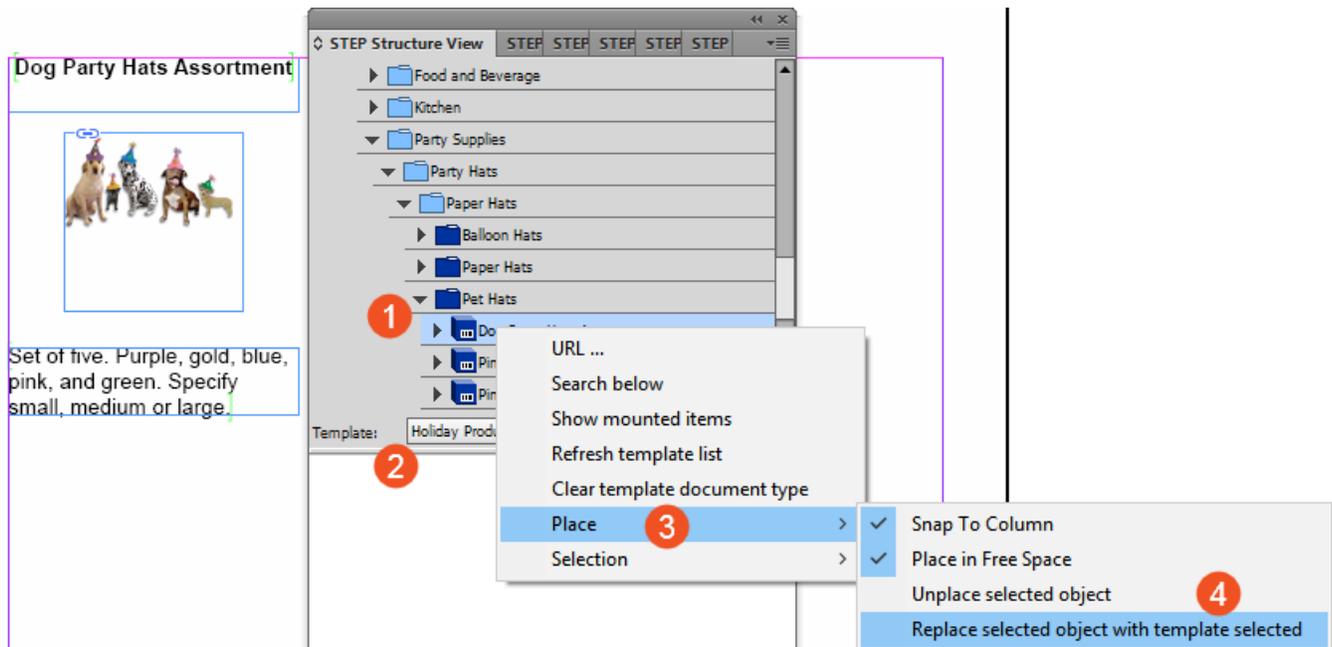
Remounting Products

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

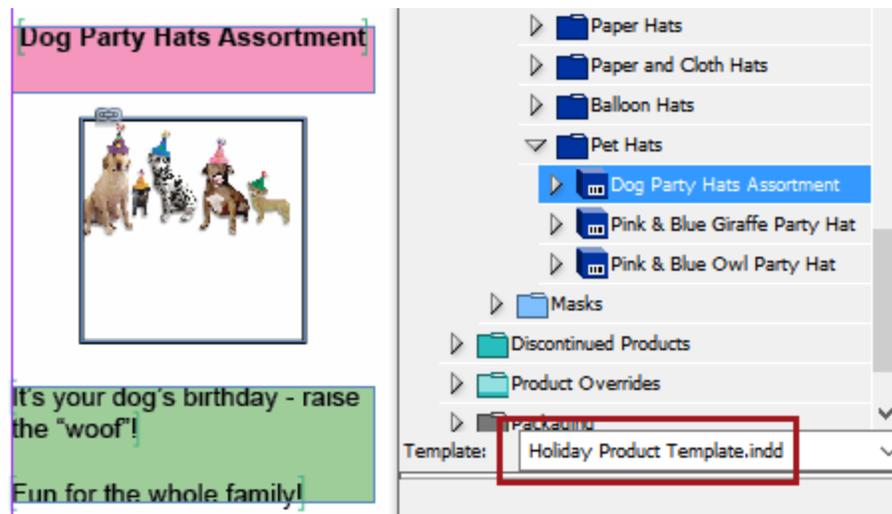
To use this command, follow these steps:

1. In the **STEP Structure View** palette, navigate to the product that you would like to remount.
2. Select the new template from the **Template** dropdown list.

3. Select **Place**, then **Replace selected object with template selected**.



4. The product is remounted using the selected template.



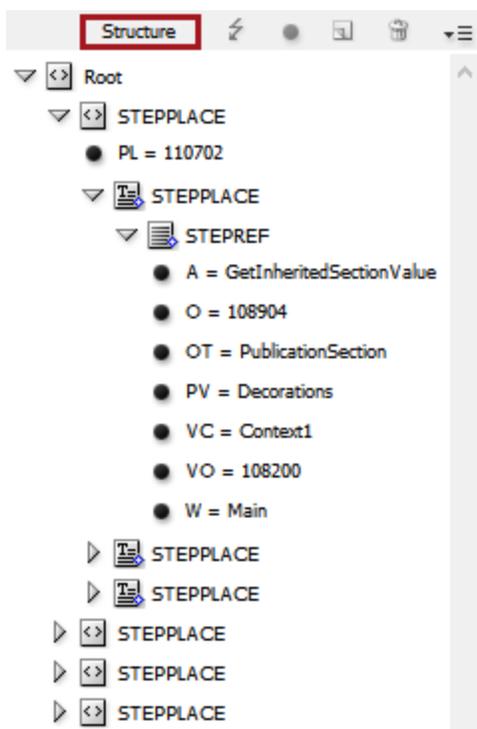
Unmounting Products

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

Once a product is mounted onto a page from STEP, information about the mounted object is embedded into the **XML Structure** in InDesign. However, unmounting a product involves more steps than simply deleting it from the page. When a mounted product is deleted, STEPXML tags still remain in the InDesign XML Structure, even though the visible data is gone from the page. Leftover STEPXML tags mean that historical data is still embedded on pages, and these leftover tags can cause issues such as:

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

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



There are three ways to properly unmount a product and clear the InDesign XML structure.

Undo

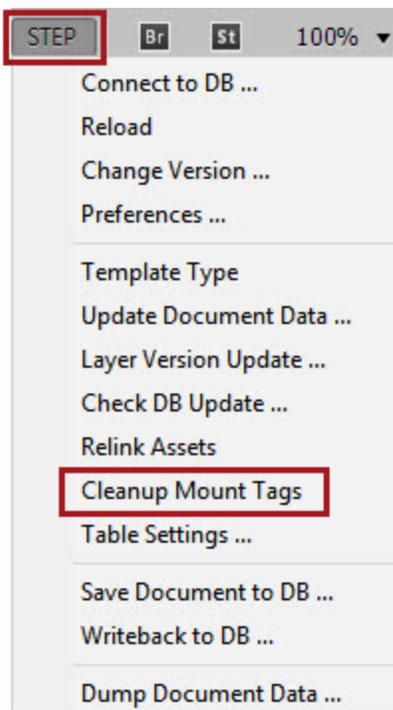
After mounting a product, if you decide that you are unhappy with the results and would like to mount it again, or, you are testing on a publication template and want to return to a clean slate after mounting, perform one of the following actions:

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



Delete Mounted Object and Cleanup Mount Tags

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

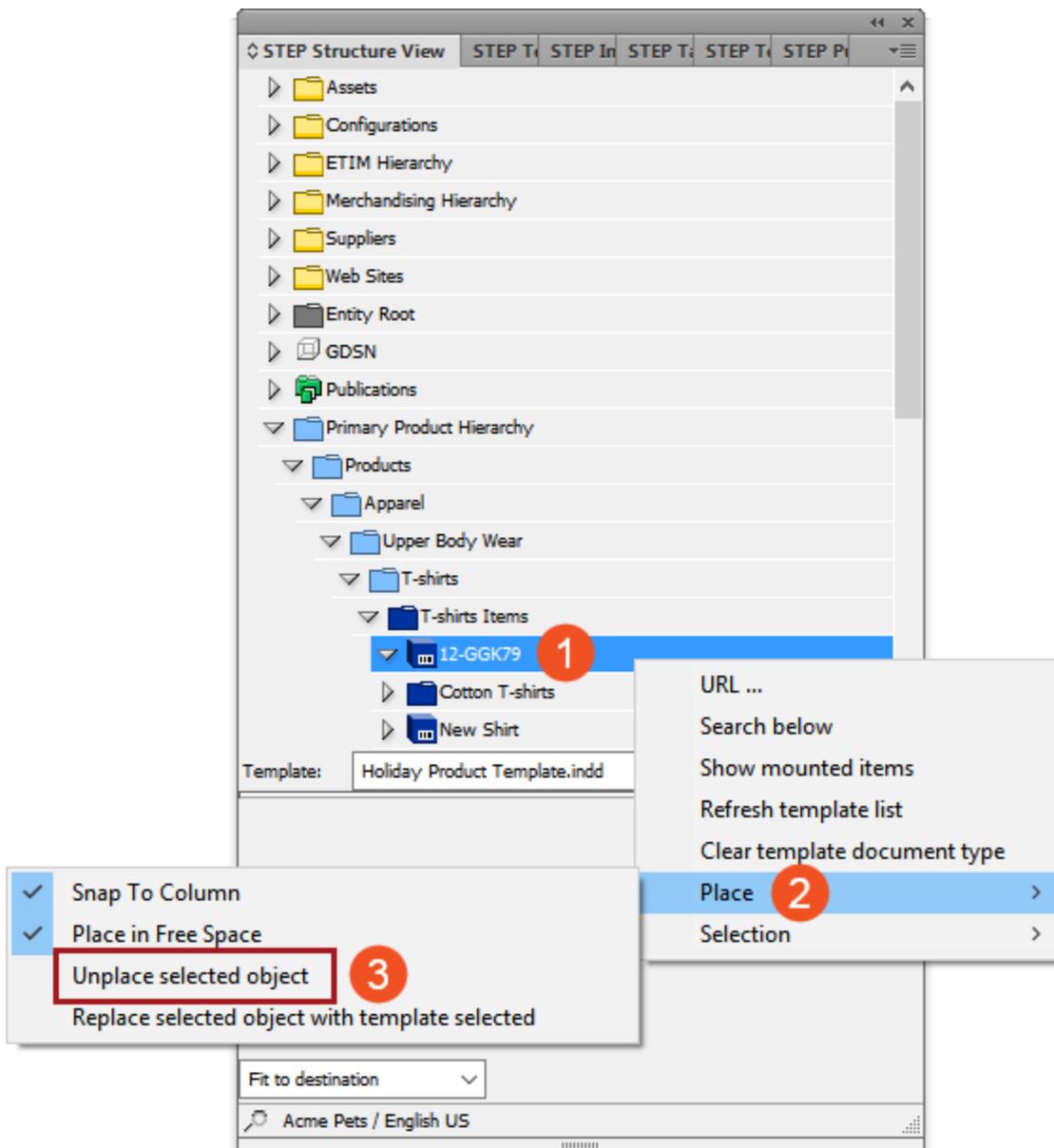


3. The XML Structure is now cleared.

Unplace selected object

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

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



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

Sequencing Images in InDesign

Assets can be mounted in a specified sequence on InDesign pages by using an **Asset Order Meta-attribute** that is valid on the link between products and image reference types. This attribute is used for asset reference types that allow for multiple references.

If there are multiple references from a product to various images using the same reference type (for example, 'Product Images'), and the product template calls out the Product Images, then all of the images will mount to the page. However, without configuring an asset order meta-attribute to control their sequence, they will mount in the alphabetically / numerically sorted order that they appear in the workbench.

This topic explains how to create and configure an asset order meta-attribute, how to configure image frames on product templates to mount multiple images at one time, how to tile these images, and how to sequence them.

Product	Sub Products	References	Referenced By	Images & Documents	Commercial	Tables	Categories
Image References							
Reference Type	>	Target	>	Thumbnail		Image Display Sequence	>
		20801				20	
		20803				30	
		20805				60	
> Product Images	+	Cosmic Party Hat				50	
		orange cap				10	
		Pink & Green Hat				40	
		Yellow & Pink Hat				70	

Creating and Configuring the Asset Order Meta-attribute

If your system does not already have an attribute that is dedicated for use as the asset order meta-attribute, you can create this attribute with the following steps.

1. Create a description attribute following the steps outlined in the **Creating Attributes** topic in the **System Setup / Super User Guide** documentation. A suggested location for the attribute is within a 'Metadata' folder.
2. The following screenshot shows an attribute with a STEP ID of **ImageDisplaySequence** and a name of **Image Display Sequence**. It is recommended to give the attribute an easily identifiable ID and name so it will not be confused with other sequencing attributes, such as an attribute display sequence attribute. The same attribute cannot be used for both image display and attribute display. The attribute must have a Type of **Description** and a Validation Base Type of **Number**.

System Setup

- eClass Meta Attributes
- ETIM6 Attributes
- ETIM Attributes
- GDSN Attributes
- GDSN System Attributes
- Manual Sequencing
- Manufacturer Information
- Metadata
 - Asset Metadata
 - Asset Keywords
 - Caption 1
 - Caption 2
 - Caption 3
 - Caption 4
 - Image Display Sequence**
 - Link Metadata
 - Publication Metadata

Image Display Sequence - Attribute

Profile | Log | State Log | Tasks

Attribute | References | Attribute Transformation

Description

Name	Value
ID	ImageDisplaySequence
Name	Image Display Sequence
Last edited by	2016-07-26 15:26:26 by USER
Full Text Indexable	No
Externally Maintained	No
Completeness Score	
Hierarchical Filtering	None
Calculated	No
Type	Description

Image Display Sequence - Attribute

Profile | Log | State Log | Tasks

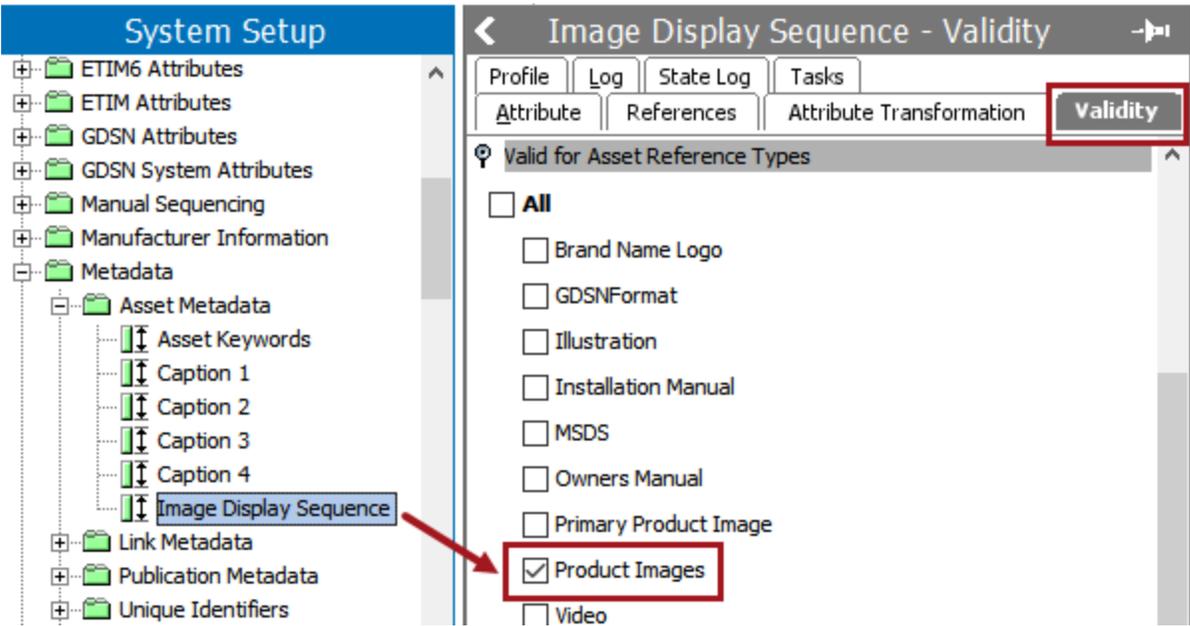
Attribute | References | Attribute Transformation

Description

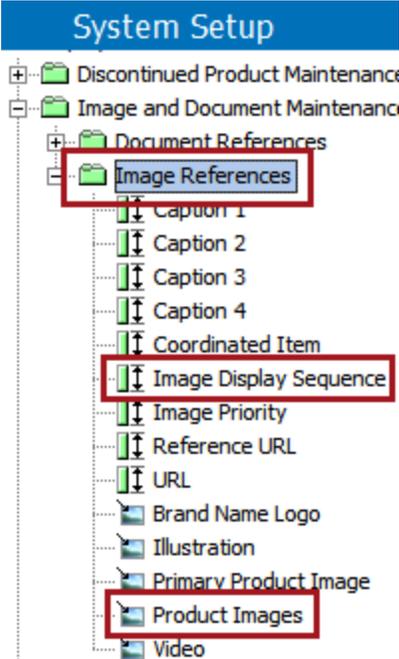
Attribute Validation

Name	Value
Validation Base Type	Number
List Of Values	N/A

3. On the **Validity** tab for the attribute, make the attribute valid on the asset reference types that you will be using it for. In this example, the Image Display Attribute is valid on the Product Images reference type.

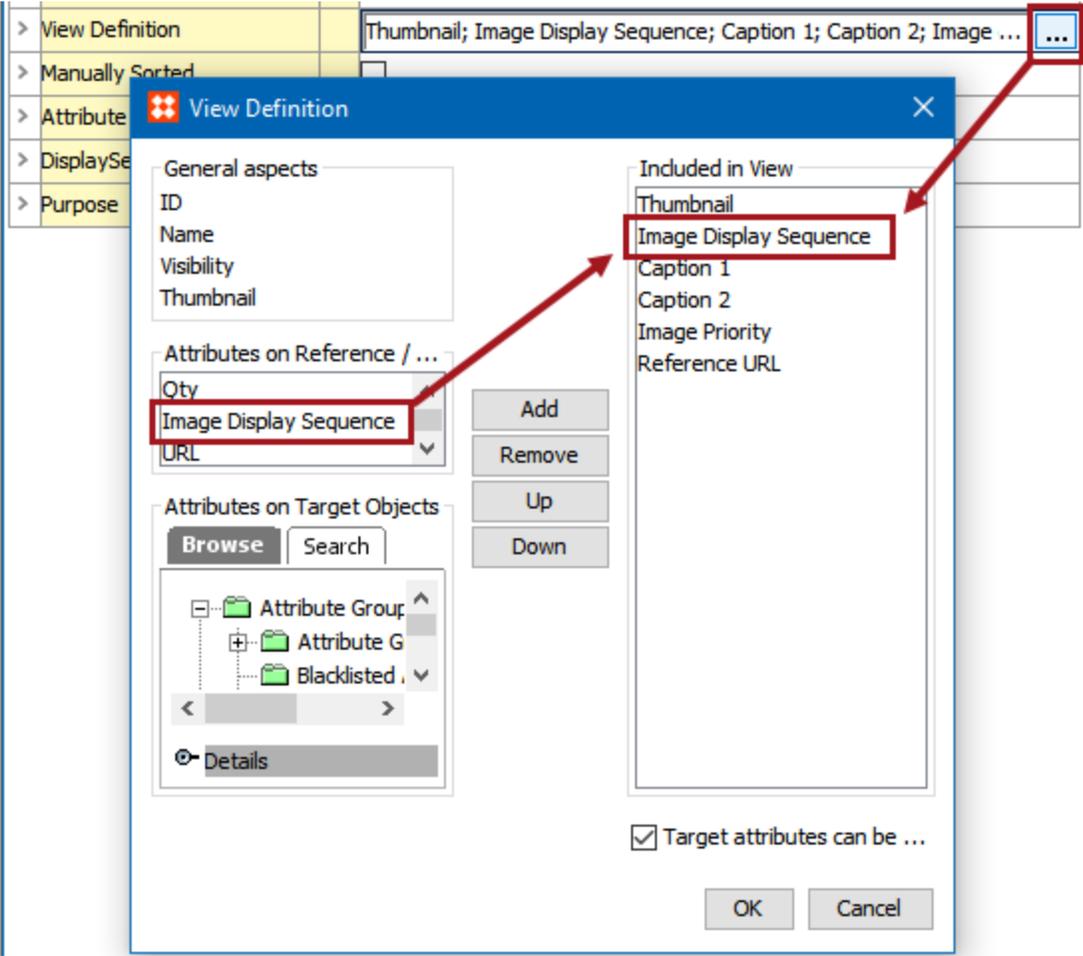


4. The attribute must also be placed into an attribute group that contains the relevant asset reference type(s) for which the attribute is valid.

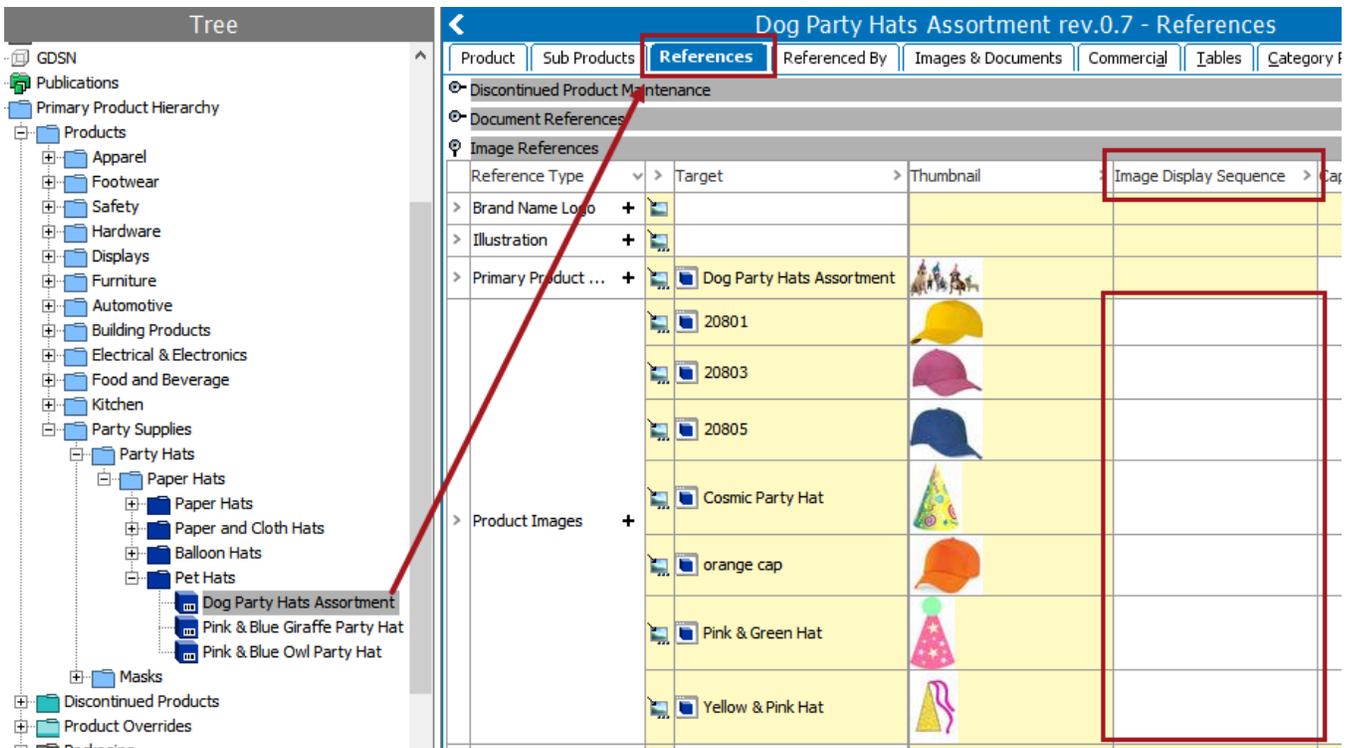


5. The **View Definition** for the attribute group that contains the asset order meta-attribute and associated asset reference type must be configured to display the asset order meta-attribute on the links between the assets and the product on the **References** tab in the workbench. For details on how to configure a view definition for

an attribute group, see the **Attribute Groups** topic in the **System Setup / Super User Guide** documentation.

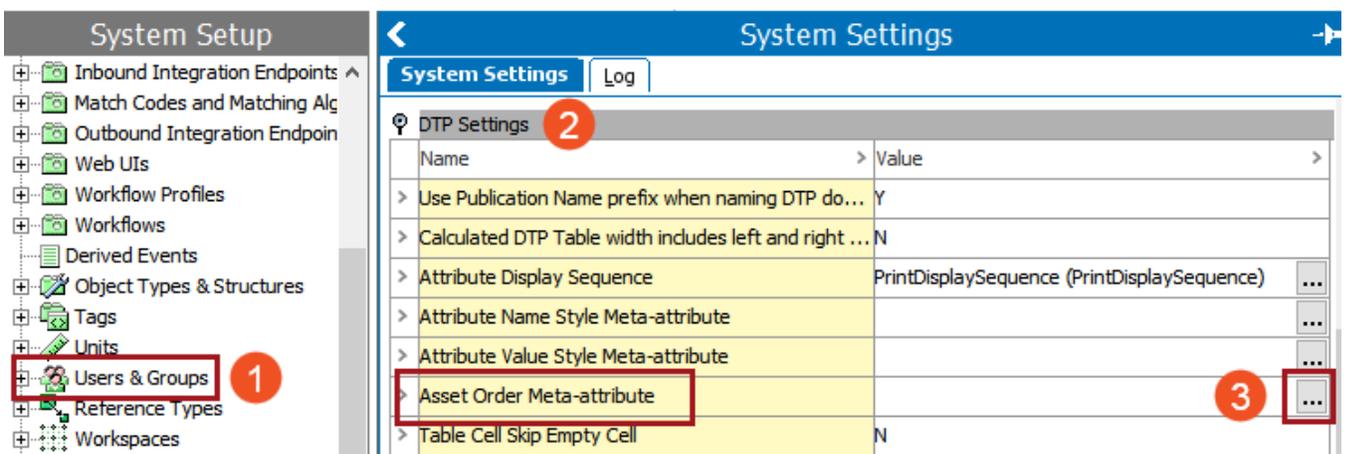


- 6. After the View Definition is configured, the Image Display Sequence attribute will be visible on the References tab of your product on the link between the product object and the assets. The below screenshot shows seven images linked to the product using the Product Images reference type and a column containing the Image Display Sequence attribute.

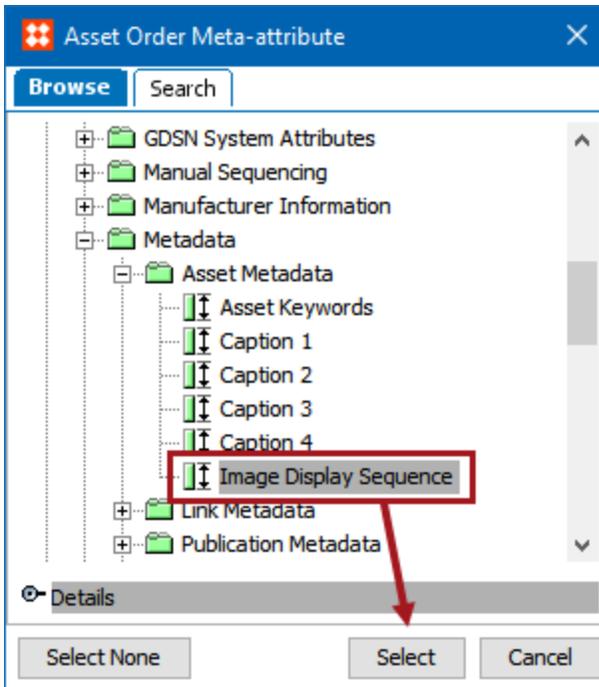


7. In order for the sequencing attribute to take effect on InDesign pages, the attribute must be designated as the **Asset Order Meta-attribute** in System Settings.

- Navigate to System Setup > Users & Groups, System Settings, then expand the **DTP Settings** flipper.
- Click the ellipsis button (...) in the **Asset Order Meta-attribute** field.



- In the Asset Order Meta-attribute dialog that displays, browse to or search for the asset ordering attribute, then click **Select**.



- The attribute is now set as the system-wide asset order meta-attribute.



Setting the Sequence of Images in STEP

Once the Image Display Sequence attribute is available on the References tab and has been set as the asset order meta-attribute, the next step is to designate the order in which you would like the images to mount.

1. Navigate to your product object in the Tree, then click on the **References** tab.
2. Enter numbers in the asset order meta-attribute fields (in this example, Image Display Sequence) to designate the order in which you would like the images to mount.

In this example, seven product images are ordered in increments of 10. This method of numbering is best practice in case the images need to be rearranged later or if a new image needs to be added to the group. For example, if an image is added later but needs to mount in the third position, it can be numbered 21 and the numbering on the other images can be left as-is.

Thumbnail >	Image Display Sequence >
	20
	30
	60
	50
	10
	40
	70

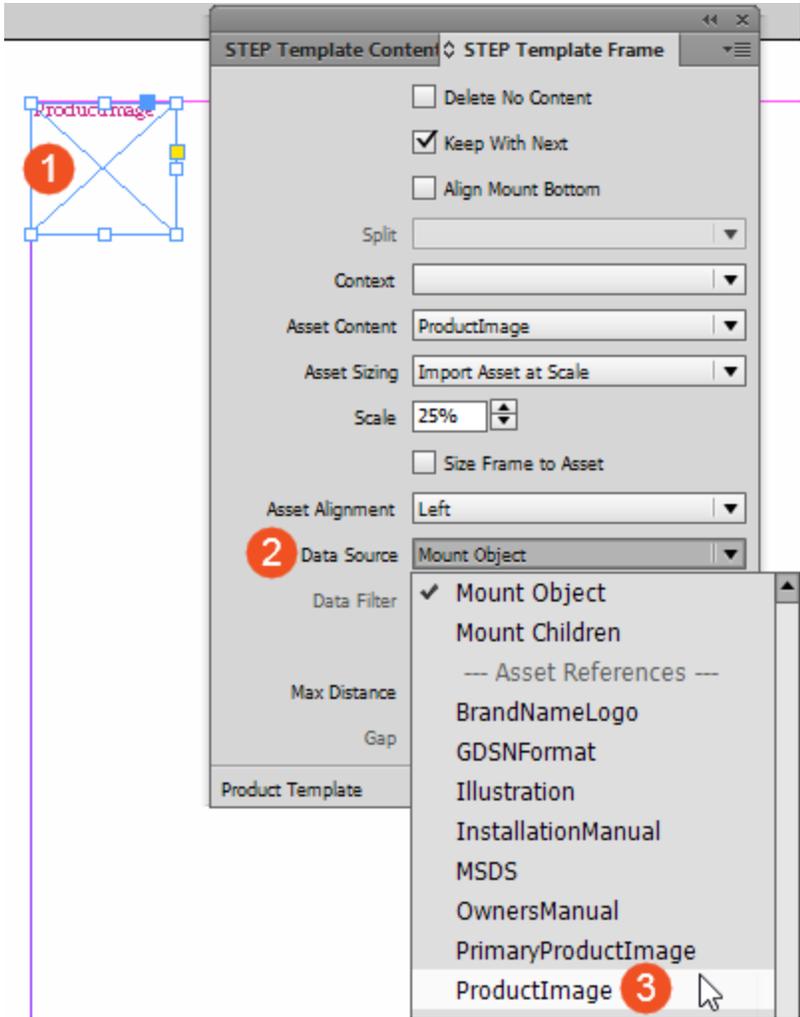
Tiling Images in Individual Frames on InDesign pages

Once the asset order meta-attribute has been created and configured, the next step is to configure the image frame on your product template to tile multiple assets across the page. These configurations are applied using the **STEP Template Frame** palette.

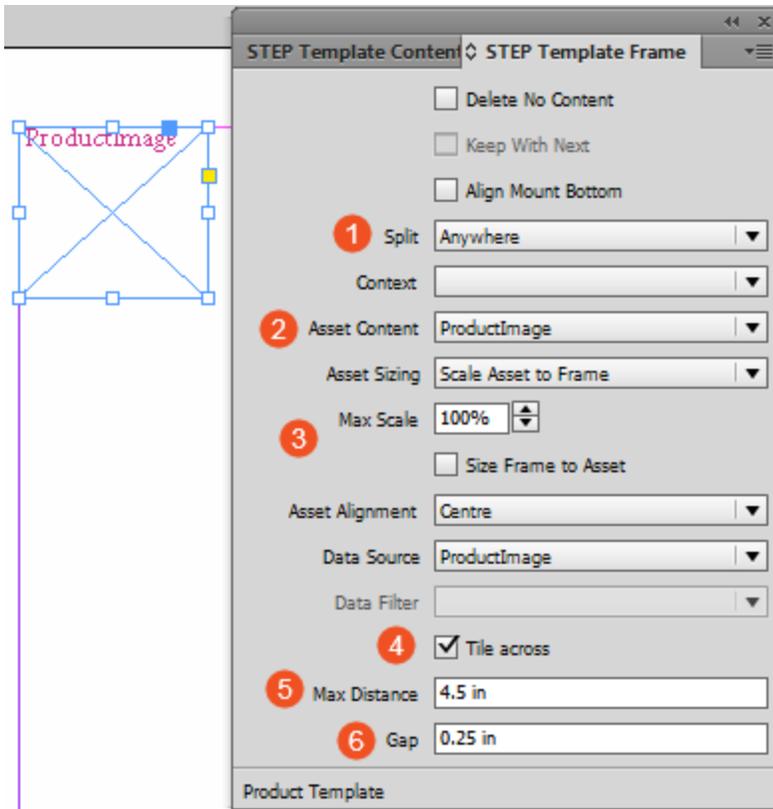
Configuring the Product Template to Tile Image Frames

The following steps assume that you have already created a product template with an image frame, the template is open in InDesign, and the **STEP Template Frame** palette is also open. For more detailed information on all available options on STEP Template Frame palette for image frames, see the **Image Frame Parameters** topic.

- Select the image frame on your product template, then click on the **Data Source** dropdown list on the STEP Template Frame palette and select the desired asset reference type, for example, ProductImage.

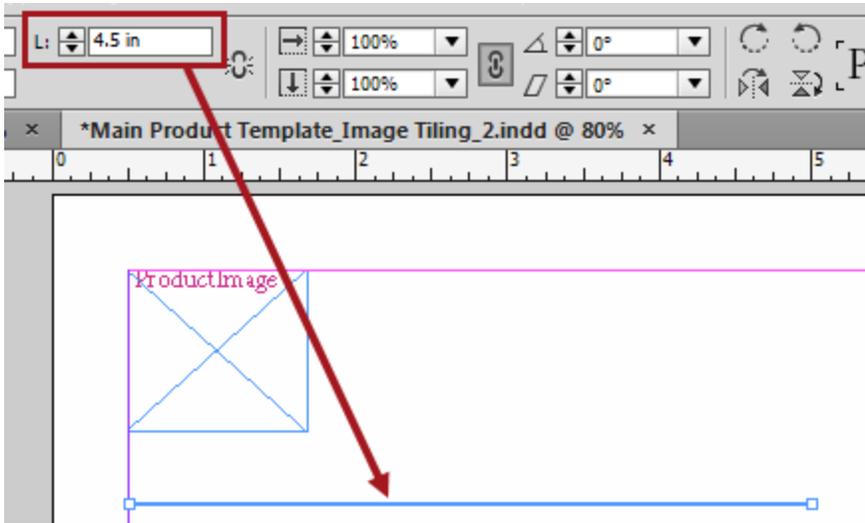


- The following settings also must be set on the STEP Template Frame palette for the images. The numbers in the following screenshot correspond to the numbers in the list below the screenshot.



1. Select a **Split** setting to determine what should happen if there are so many images that they tile off of the page when mounted. In this example, the split setting of 'Anywhere' means that a new page will be created if the images cannot fit on one page.
2. In the **Asset Content** field, select the same asset reference type that was chosen in the **Data Source** field.
3. The selections chosen for **Asset Sizing**, **Max Scale**, **Size Frame to Asset**, and **Asset Alignment** are up to the user. In this example, the settings ensure that the assets will be scaled to the size of their frames and centered within the frames.
4. The **Tile across** checkbox must be selected in order for the images to tile across the page. If left unchecked, the images will mount vertically.
5. A **Max Distance** must be entered to tell the system how far across the page the images should tile before wrapping around to a second row. If no distance is set here, the images will tile off of the edge of the page if there are too many to fit in a single row. Max distance starts at the left edge of the image frame and ends at the point where you would like the tiling to start over on a second row.

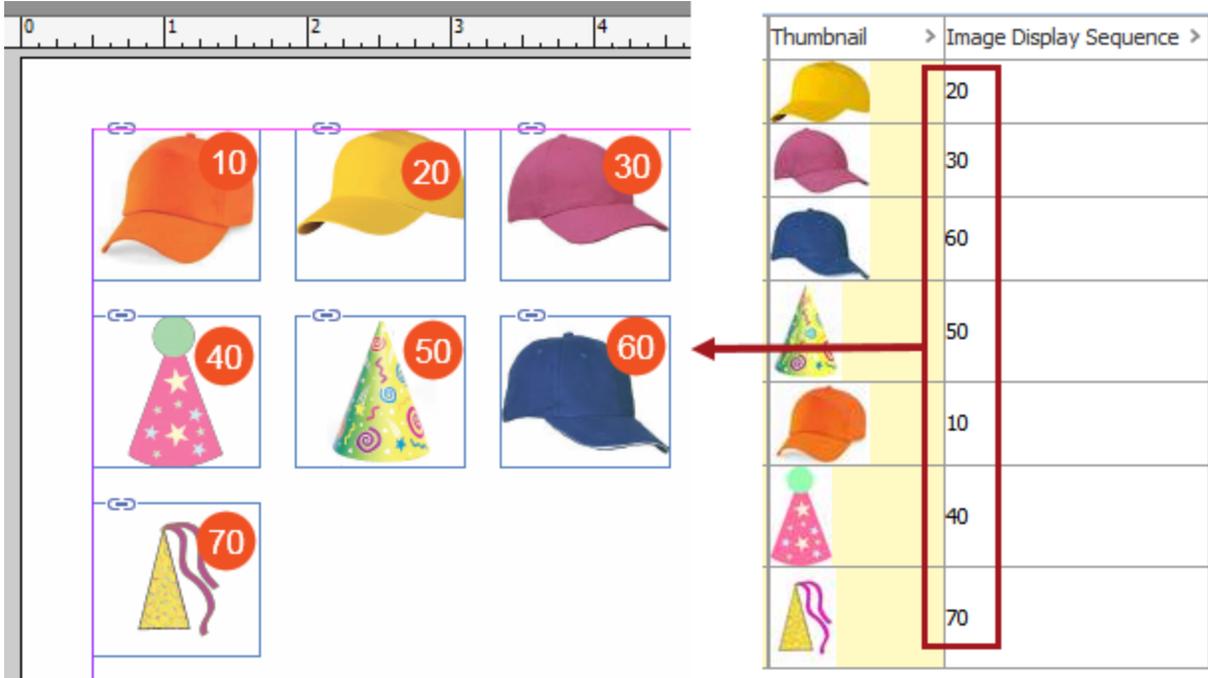
One method of determining max distance is to draw a line on the product template that aligns with the left edge of the image, then enter the length of that line into the Max Distance field. Delete the line once you have determined its length.



6. A **Gap** distance must be set if you would like space to appear between the image frames when mounted.

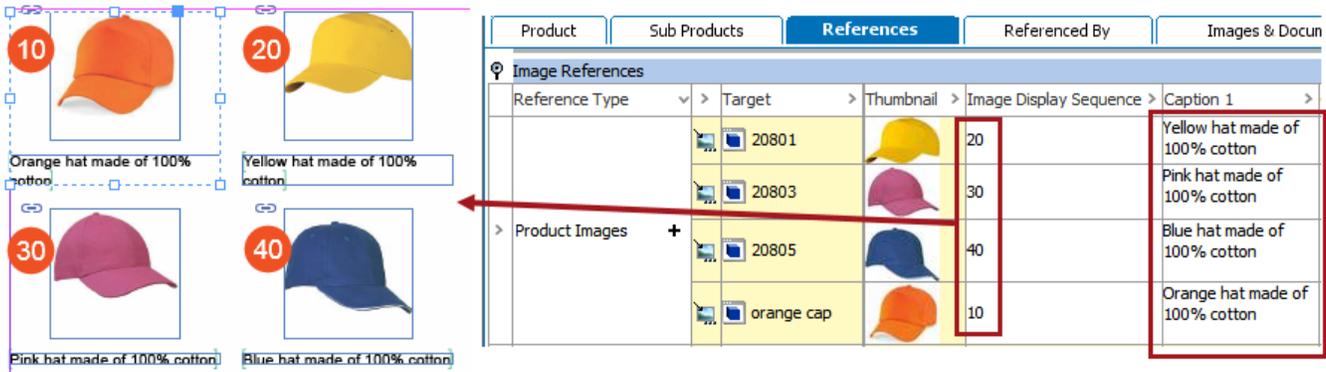
Note: The **Gap** distance should be factored in when setting **Max Distance**.

- When the product is mounted, the images appear in the location on the page designated by the template and in the order specified in STEP. See the **Mounting Products** topic for more information on how to mount objects to InDesign pages.



Sequencing Grouped Image Frames

Image frames that are part of tiled grouped frames, which are commonly used to mount images with metadata captions, can also be sequenced using the steps outlined in this topic. For information on images in grouped frames, see the **Mounting Images With Metadata Captions** topic.



Mounting Images With Metadata Captions

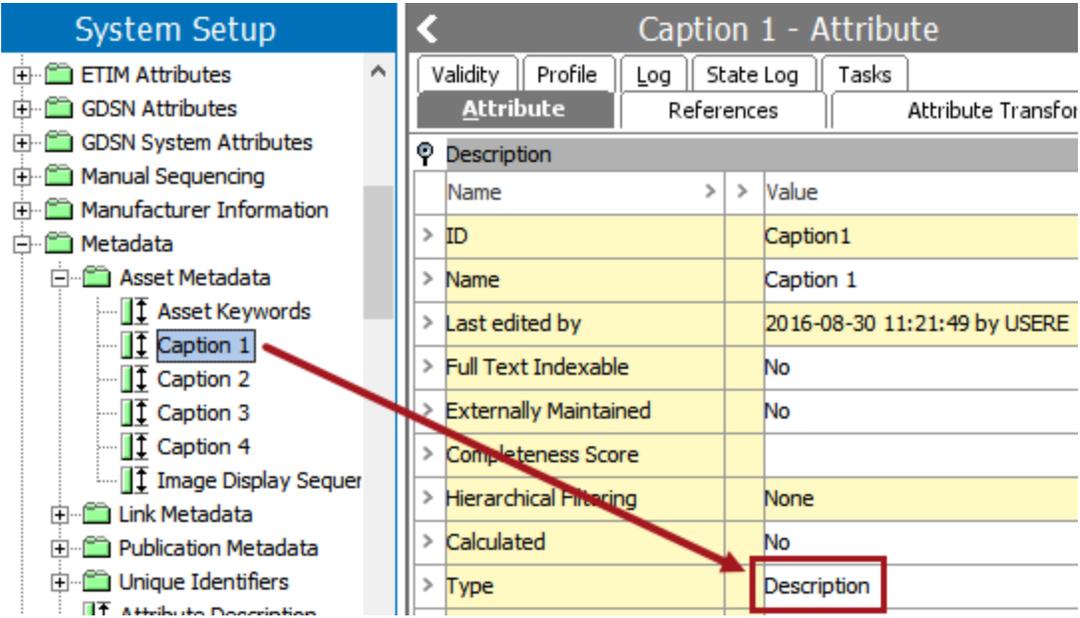
To keep the number of caption attributes at a minimum in STEP, image metadata captions are commonly used. Image metadata captions are description attributes that are made valid for Asset Reference types. As such, they exist on the link between products and assets. **Grouped frames** are used on product templates to mount these captions along with their corresponding images onto InDesign pages.

Using metadata captions for images keeps the number of caption attributes low because a single metadata attribute can be used, for example, on seven images that are linked to a single product, as opposed to needing seven different caption attributes. Another advantage to using caption attributes that are valid for an asset reference type, as opposed to using a description attribute that is valid on the asset type itself, is that the caption is not attached to the asset, and can change from product to product that the image is linked to.

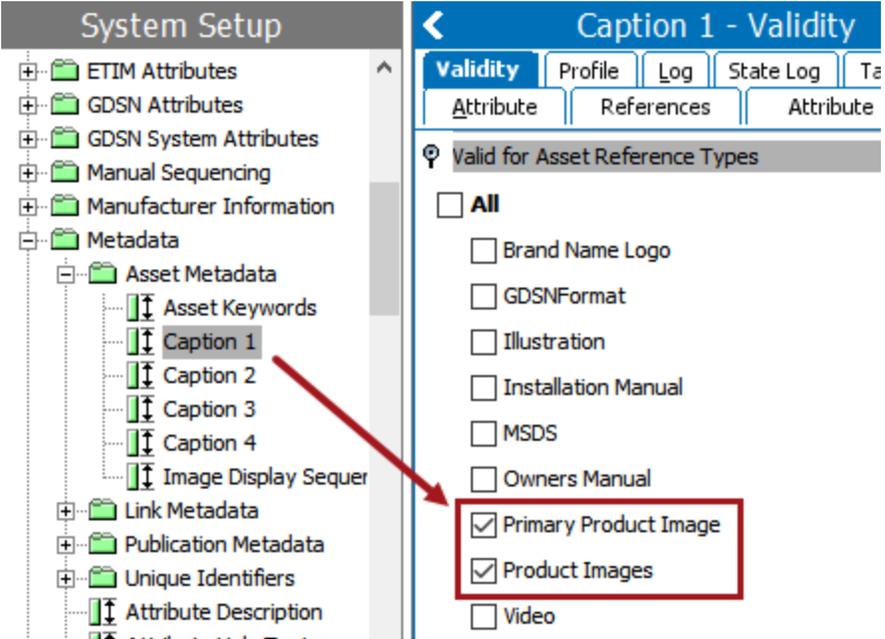
Configuring a Metadata Caption Attribute

Metadata image caption attributes are created and configured like any other description attribute that is made valid on an asset reference type. If your system does not already have attribute(s) that are being used for image captions, you can create them with the following steps.

1. Create a description attribute following the steps outlined in the **Creating Attributes** topic in the **System Setup / Super User Guide** documentation. A suggested location for the attribute is within a 'Metadata' or 'Asset Metadata' folder.
2. The following screenshot shows a sample attribute with a STEP ID of **Caption1** and a name of **Caption 1**. The attribute must have a Type of **Description**.

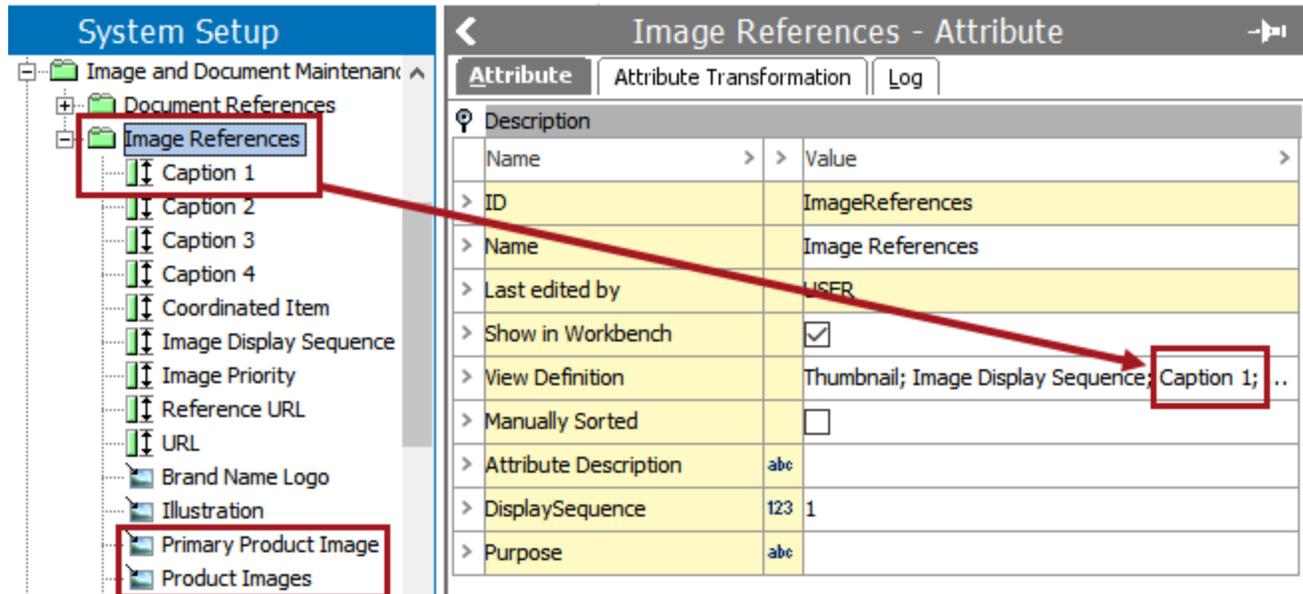


3. On the **Validity** tab for the attribute, make the attribute valid on the asset reference types that you will be using it for. In this example, the Caption 1 attribute is valid on the 'Primary Product Image' and 'Product Images' reference types.

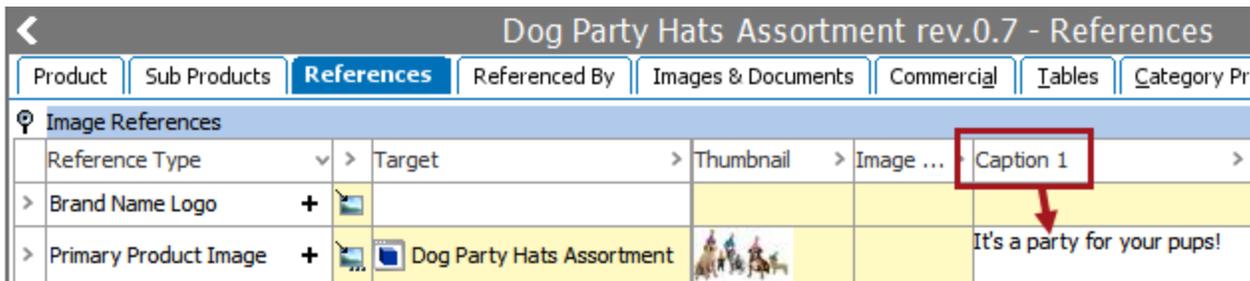


4. Lastly, the attribute must be placed into an attribute group that contains the relevant asset reference type(s) for which the attribute is valid. This attribute group must have its **View Definition** configured to display the caption attribute on the reference links between the assets and the product on the **References** tab in the workbench.

For details on how to configure a view definition for an attribute group, see the **Attribute Groups** topic in the **System Setup / Super User Guide** documentation.



5. After the View Definition is configured, the caption attribute will be visible on the **References** tab of your product on the link between the product object and the asset(s). The below screenshot shows the Caption 1 attribute on the link between the product object and the asset linked with the Primary Product Image asset reference type.

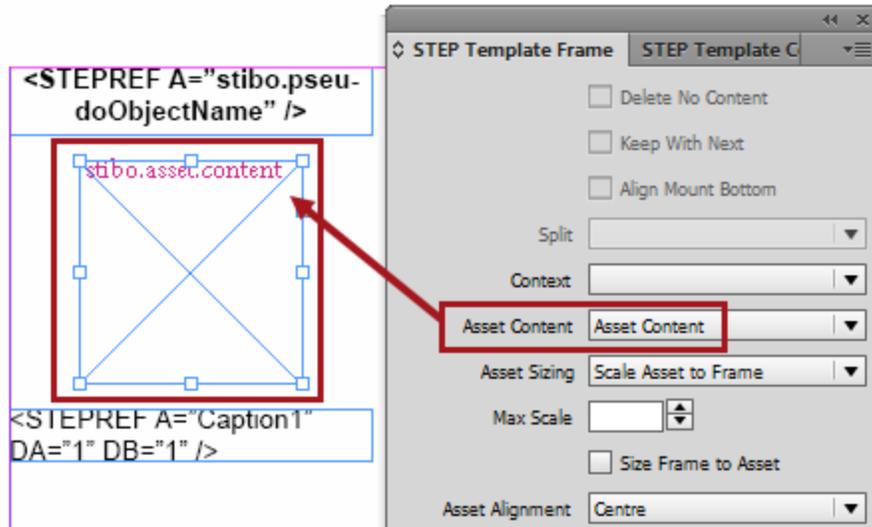


Configuring the Product Template to Mount a Metadata Image Caption

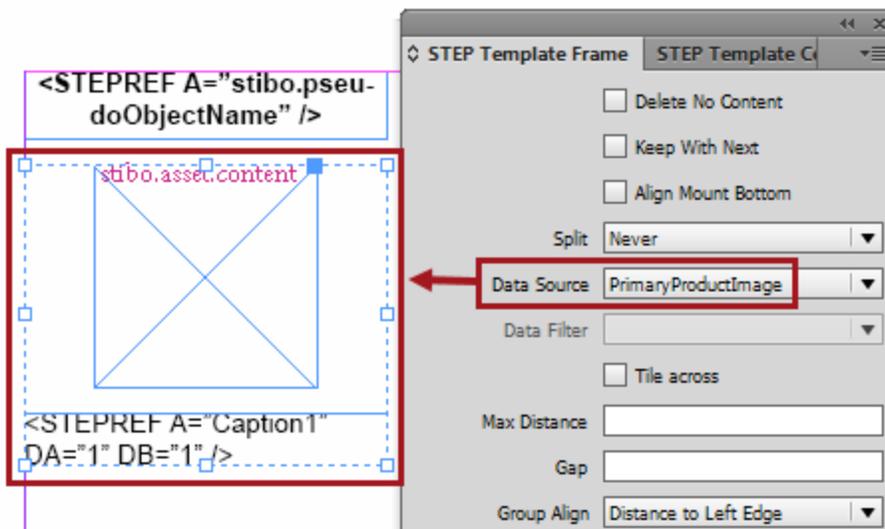
Once the image caption attribute has been created and configured, the next step is to configure a **grouped frame** on your product template that contains an image frame for the asset and a text frame for the caption. These configurations are applied using the **STEP Template Frame** palette.

The following steps assume that you have already created a product template with an image frame and a text frame (which contains the STEPXML tag for the caption attribute), the template is open in InDesign, and the **STEP Template Frame** palette is also open. For more detailed information on all available options on the STEP Template Frame palette for image frames, see the **Image Frame Parameters** topic. For more detailed information on all available options on the STEP Template Frame palette for grouped frames, see the **Grouped Frame Parameters** topic.

1. Select the image frame on your product template, then select **Asset Content** from the Asset Content dropdown list on the STEP Template Frame palette. This setting tells the system that the frame will contain asset *content*, but does not designate the asset reference type itself because it will be applied to the entire grouped frame in step 3 below.



2. Group the image and text frames together by following the instructions in the **Grouped Frames in Product Templates** topic [here](#)
3. Choose the relevant asset reference type from the **Data Source** dropdown list. In this example, the Primary Product Image reference type is used. Applying the reference type to the grouped frame instead of the image frame *inside* of the group tells the system that everything in the group will be pulled from this asset reference, including the caption attribute in the text frame.



- 4. When the product is mounted, the image caption will appear beneath the image on the page. See the **Mounting Products** topic for more information on how to mount objects to InDesign pages.

Dog Party Hats Assortment rev.0.7 - References							
Product	Sub Products	References	Referenced By	Images & Documents	Commercial	Tables	Category Pr
Image References							
Reference Type	>	Target	>	Thumbnail	>	Image ...	Caption 1
> Brand Name Logo	+						
> Primary Product Image	+	Dog Party Hats Assortment					It's a party for your pups!



Sequencing Grouped Image Frames

Image frames that are part of grouped frames can also be tiled and sequenced on the InDesign page when the product to which the images are linked is mounted. For information on sequencing images in InDesign, see the **Sequencing Images in InDesign** topic.

Product	Sub Products	References	Referenced By	Images & Docun			
Image References							
Reference Type	>	Target	>	Thumbnail	>	Image Display Sequence	Caption 1
		20801			20		Yellow hat made of 100% cotton
		20803			30		Pink hat made of 100% cotton
> Product Images	+	20805			40		Blue hat made of 100% cotton
		orange cap			10		Orange hat made of 100% cotton

Mounting Product References

The method of configuring a product template to mount data from product references is similar to the method used to mount images with metadata captions, detailed in the **Mounting Images With Metadata Captions** topic.

The example shown in this topic mounts a product object (LED Pocket Flashlight) and an associated item (AA Batteries) using a product reference type of 'Accessory Required'.

The screenshot displays the 'LED Pocket Flashlight rev.0.3 - References' window. On the left, a 'Tree' view shows a product hierarchy: Entity Root > GDSN > Publications > Primary Product Hierarchy > Products > Hardware > Tools > Task Lighting > Flashlights > Flashlights Items > LED Pocket Flashlight. A red arrow points from this node to the table below. The table has two sections: 'Image References' and 'Item References, Classification'. The 'Image References' section has columns for Reference Type, Target, and Thumbnail. The 'Item References, Classification' section also has these columns. The 'Accessory Required' reference type is highlighted, with 'AA Batteries' as the target and a thumbnail of batteries.

Reference Type	Target	Thumbnail
> Brand Name Logo		
> Illustration		
> Primary Product Image	Flashlight	
> Product Images		
> Video		

Reference Type	Target	Thumbnail
> Accessory Required	AA Batteries	

Configuring the Product Template to Mount Data from a Referenced Product

To mount data from a product object that is referenced to the object that you are mounting, certain configurations must be applied to the frame(s) on your product template using the STEP Template Frame palette. For detailed information on this palette, see the **STEP Template Frame** topic [here](#)

The following steps assume:

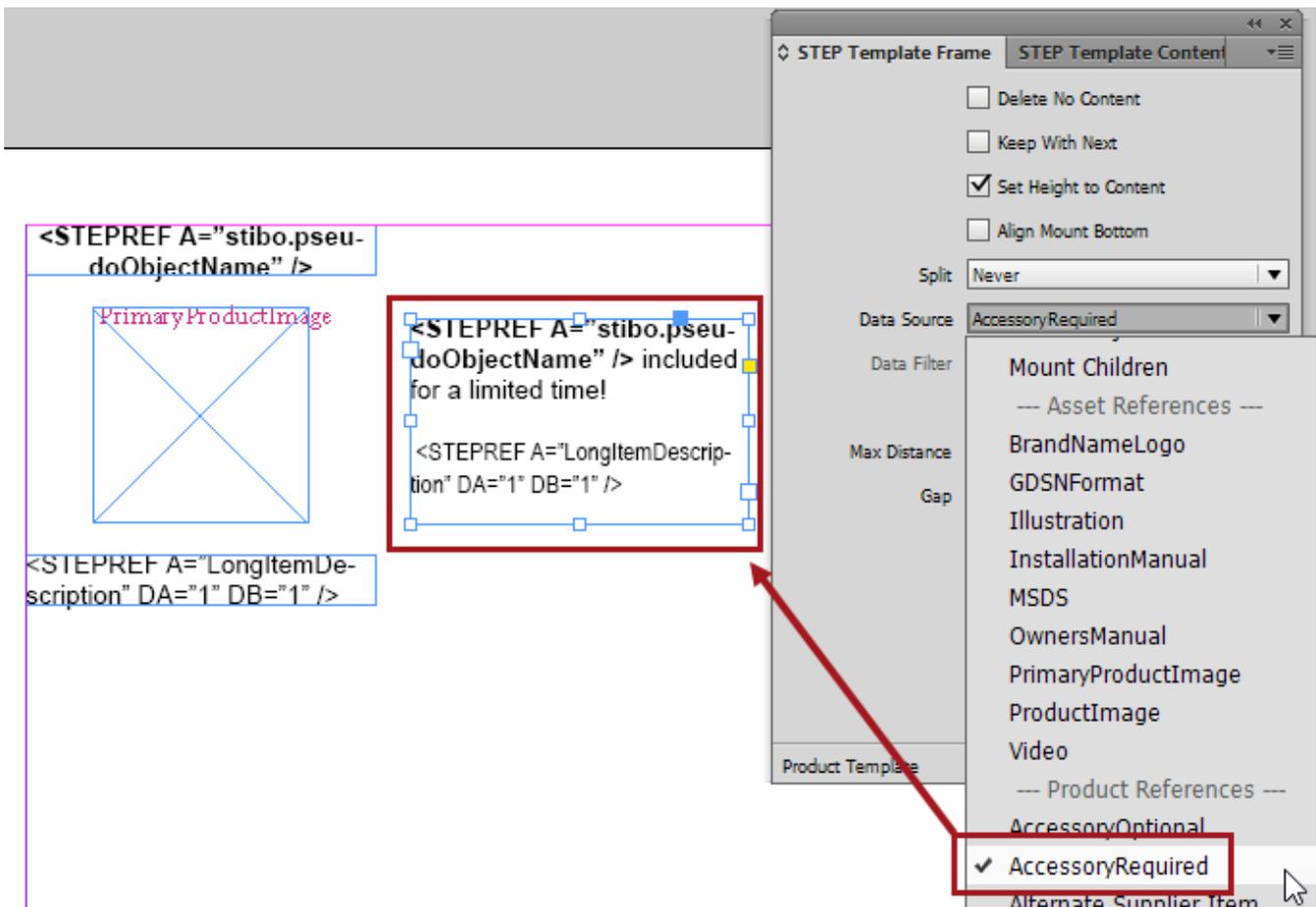
- You have already created a product template, and it is open in InDesign
- A text frame exists that contains STEPXML tags for the attribute(s) that you wish to display from the referenced product
- The STEP Template Frame palette is open
- You are familiar with the process for mounting objects to InDesign pages (see the **Mounting Products** topic for more information)

Mounting Textual Content From a Referenced Product

The product template used in this example is configured to pull in the STEP name, Primary Product Image, and Long Item Description attribute value from the product being mounted. A second frame, directly to the right, is configured to pull in the STEP name and Long Item Description attribute value from the referenced product.

To mount textual content from a referenced product:

1. Select the frame on your product template that contains the STEPXML attribute tags for the data that you wish to mount from the referenced product.
2. Select the relevant Product Reference from the **Data Source** dropdown list on the STEP Template Frame palette.



3. When the product is mounted, the data from the referenced product (AA Batteries) appears in the frame that was configured to bring in data from the Accessory Required product reference.

Batteries Items	Display
20881 AA Battery 2 Pk	Name > > Value
20881 C Battery 2 Pack	Long Item Description abc Acme battery, all purpose, AA, 4 per pack
20888 AAA Batteries	> Manufacturer's Part Number abc A4-73328
AA Batteries	> Country of Origin CHINA
Batteries Deco Items	> Manufacturer Name abc Acme, Inc.

LED Pocket Flashlight



AA Batteries included for a limited time!

Acme battery, all purpose, AA, 4 per pack

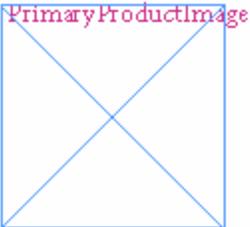
This handy pocket-sized flashlight is stainless steel and waterproof.

Mounting Textual and Asset Content From a Referenced Product

The following steps build on the procedure outlined in the previous section, except an asset frame will be added and grouped with the text frame to mount an asset that is linked to the referenced product.

- 1. Add an image frame to the product template and apply the relevant asset reference type to the frame, which is Primary Product Image in this example.

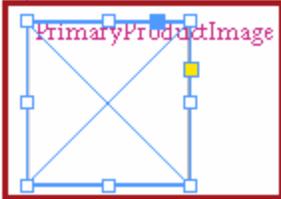
```
<STEPREF A="stibo.pseudoObjectName" />
```



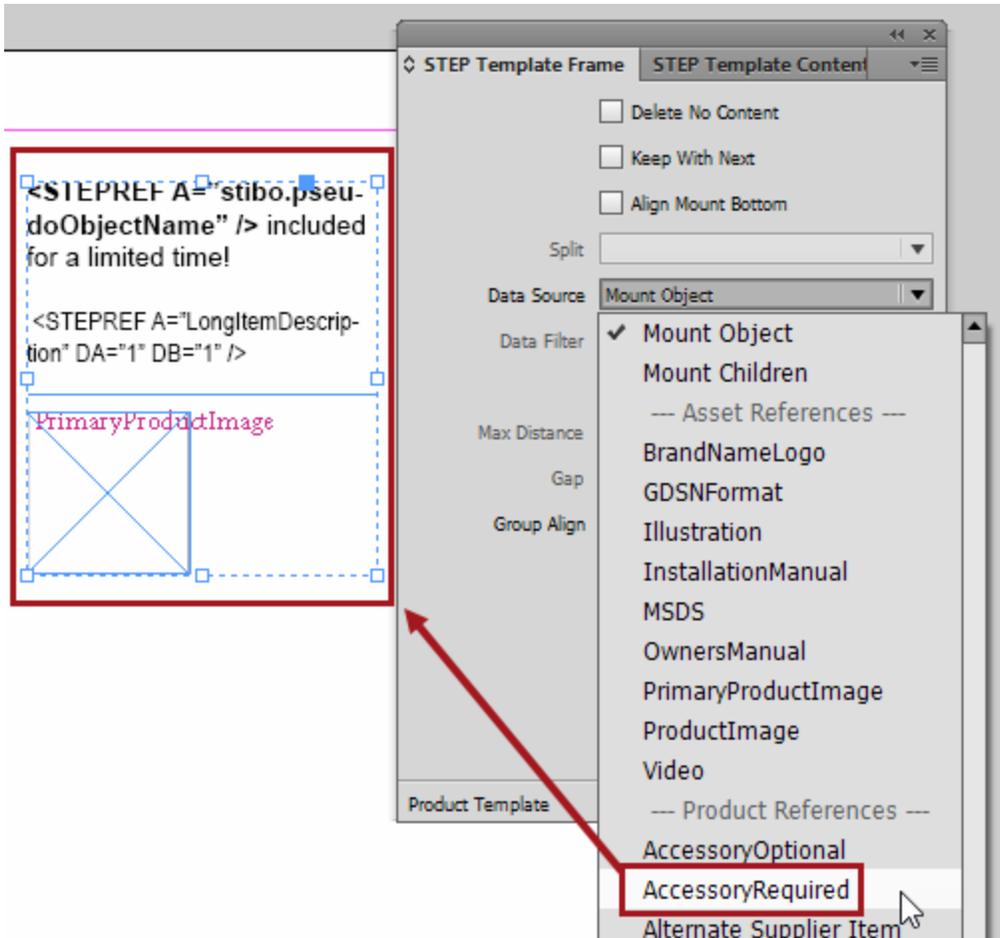
```
<STEPREF A="LongItemDescription" DA="1" DB="1" />
```

```
<STEPREF A="stibo.pseudoObjectName" /> included for a limited time!
```

```
<STEPREF A="LongItemDescription" DA="1" DB="1" />
```



- Group the image frame with the text frame following the instructions provided in the **Grouped Frames in Product Templates** topic [here](#)
- Select the grouped frame, then select the relevant Product Reference from the **Data Source** dropdown list on the STEP Template Frame palette.



- When the product is mounted, the textual and asset data from the referenced product (AA Batteries) appears on the page.



Using the Repeat Function for Subproducts

The STEP'n'design repeat function **STEPREPEAT** is used to mount attributes, asset references, tables, or any other values from child objects of a parent object by repeating the STEPXML tags for subproducts. For example, if mounting a product family, the repeat function STEPREPEAT is used to pull data that exists on the child products of the family. In addition to child product objects, this function can also be used to mount data from child objects within the classification structure or the publication structure.

Manufacturing Information:

Christmas Party Hat is made by Acme Party Supplies in CHINA.
 Cosmic Party Hat is made by Beta Party Supplies in BRAZIL.
 Dog Party Hats Assortment is made by Hats-R-Us in VIET NAM.
 Pink & Green Party Hat is made by Parties Inc. in UNITED STATES.
 Pink & Green Pom-Pom Hat is made by Zeta Party Supplies in TAIWAN.
 Political Party Hat is made by Acme Party Supplies in MEXICO.
 Purple & White Party Hat is made by Hats-R-Us in HONG KONG.
 Yellow & Pink Party Hat is made by Parties Inc. in INDIA.

As an alternative to creating a table in STEP, the STEPREPEAT function can repeat a range of attributes for the subproducts of the product being mounted. This can enable you to create a simple, table-like structure on your InDesign page where every subproduct has its own row. However, to make the data more closely resemble a table, additional formatting would need to be applied, and STEP tables provide more complex formatting options. For information on STEP Tables, see **About STEP Tables** in the **Tables** documentation.

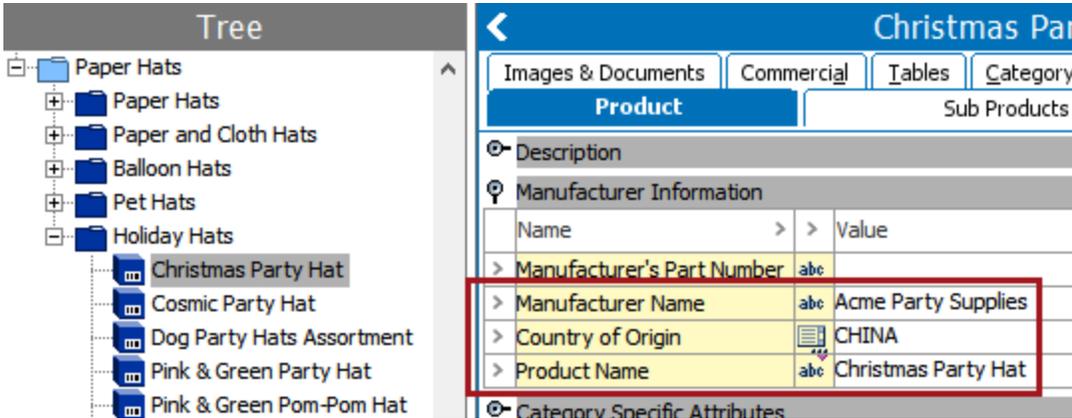
Configuring the Product Template to use the Repeat Function

This topic assumes that a product template has already been created with a frame that contains the STEPXML tags for the attributes that should be mounted from the child objects. In this example, the original frame on the product template—before the repeat functionality is applied—looks like the following and contains free text values along with three attributes: 'ProductName,' 'ManufacturerName,' and 'CountryOfOrigin.'

Manufacturing Information:

<STEPREF A="ProductName"/> is made by <STEPREF A="ManufacturerName"/> in <STEPREF A="CountryOfOrigin"/>.

The parent object that will be used in this example is 'Holiday Hats.' One of its child objects, 'Christmas Party Hat,' is pictured below in the STEP Workbench. The values for 'ProductName,' 'ManufacturerName,' and 'CountryOfOrigin' are outlined in red.



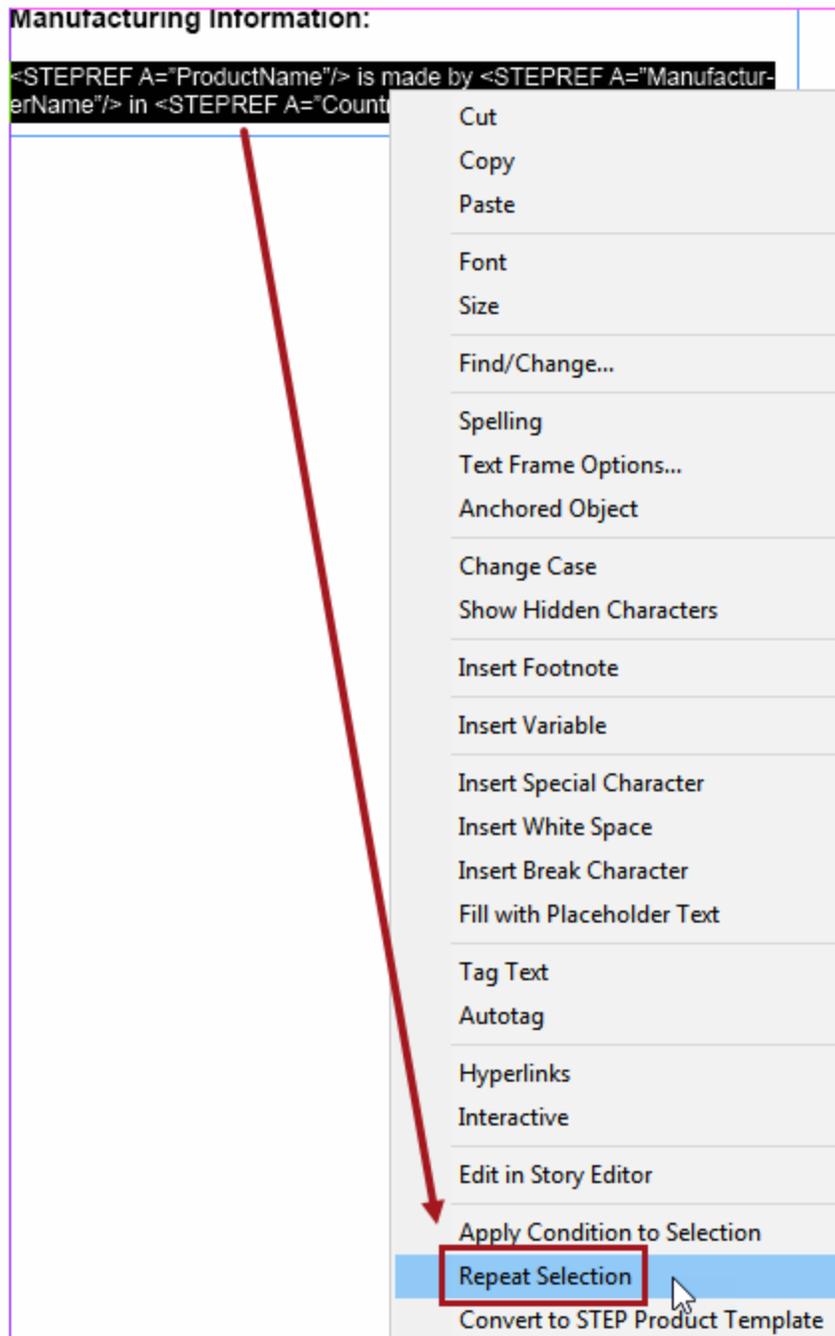
Before applying the repeat functionality to the template, and when only mounting a child product, the mounted page looks as follows. The goal of applying the STEP REPEAT functionality to the template will be to mount the same attribute data from the other child objects in the parent folder.

Manufacturing Information:

Christmas Party Hat is made by Acme Party Supplies in CHINA.

Applying the STEP REPEAT Function to Product Template Tags

1. On your product template, expand the InDesign text frame containing the STEP tag(s) that you would like to repeat.
2. Using the InDesign Text tool, select the XML tag(s) within the frame that you would like to repeat. One or more STEPXML tags can be selected.
3. With the tags selected, right-click and select **Repeat Selection** from the menu that displays.



4. In the **Repeat Selection** dialog that displays, there are 10 options that can be configured to control how the repeated content appears on the page. Click **OK** when you have finished configuring your selections.

The options and their descriptions are as follows. For more information on the options that are identical to those present on the STEP Template Content palette, see the **STEP Template Content** topic.

- **Delete Before + Delete After:** If a mounted attribute is empty, STEP'n'design can be configured to remove a number of characters either before or after the location where the attribute should have been placed. This setting is identical to the 'Delete Before' and 'Delete After' options that appear on the STEP Template Content palette.
- **Fail Text:** If an attribute does not contain a value for the product you are mounting, you can use this field to insert text that should appear on the page instead of a blank space or frame. This setting is identical to the Fail Text option that appears on the STEP Template Content palette.
- **Repeat Separator:** Enter the repeat separator string or character that will separate the repeated values ('rows') on the page. The most commonly used separators are **ln** (hard return), **lr** (soft return), and **lt** (tab), though the character can be as simple as a comma.
- **Line Styles:** Allows you to assign specific InDesign styles to the 'rows' in the 'table' created by the repeat function. Choose which InDesign **paragraph style** to apply to each 'line' of the repeated attribute values. These are not the same as *table* rule line settings. The styles in the line style dropdowns are populated by the InDesign paragraph styles present in the product template.

- **Data Filter:** Only one option is available—'Limit to Section Object Types'. Choose this to mount metadata attributes and/or other information from child section / subsection objects when mounting publication or section objects. This functionality is typically used in AutoPage publications to create tables of contents / section indexes. See the **Creating a Table of Contents Product Template** topic for more information.
5. Once all options have been configured on the **Repeat Selection** dialog, the product template will resemble the following. The STEP REPEAT tag has been placed at the beginning and end of the selected tags. The paragraph style 'Blue Text' has been selected as the Even Line Style (ELS), and the hard return (\n) has been selected as the repeat separator (RS).

Manufacturing Information:

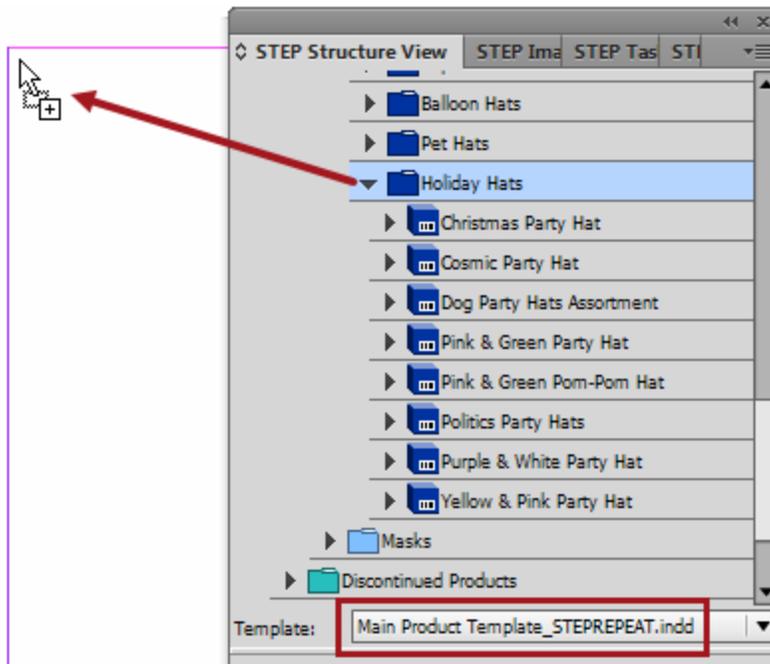
```
<STEPREPEAT ELS="Blue Text" RS="\n" ><STEPREF A="Product-Name /> is made by <STEPREF A="manufacturerName"/> in <STEPREF A="CountryOfOrigin"/> </STEPREPEAT>
```

Mounting a Product Using the Repeat Function

A *parent* product object will be mounted using the product template configured with the STEP REPEAT option.

The following steps assume that you have already selected the relevant product template from the **Template** dropdown menu in the **STEP Structure View** palette and that you have already located the product that you want to mount. Additionally, it assumes that you already have a publication template / mounting page created and configured.

1. Drag the parent product object onto the publication template / mounting page following the instructions outlined in the **Mounting Products** topic.



- The attributes specified on the product template are mounted from each child product. In the below example, every other 'line' of text—the even lines—are mounted in blue text, and each line is separated by a hard return.

```

Manufacturing Information:
Christmas Party Hat is made by Acme Party Supplies in CHINA.
Cosmic Party Hat is made by Beta Party Supplies in BRAZIL.
Dog Party Hats Assortment is made by Hats-R-Us in VIET NAM.
Pink & Green Party Hat is made by Parties Inc. in UNITED STATES.
Pink & Green Pom-Pom Hat is made by Zeta Party Supplies in TAIWAN.
Political Party Hat is made by Acme Party Supplies in MEXICO.
Purple & White Party Hat is made by Hats-R-Us in HONG KONG.
Yellow & Pink Party Hat is made by Parties Inc. in INDIA.
    
```

Mounting Attributes and Images Without a Product Template

Though uncommon, it is possible to mount attribute values and images onto pages without using a product template. This type of 'one-off' mounting is done in case you would like to add additional data to a page that is not included in a product template, allowing you to add elements from STEP that you can update later instead of adding free text or an image that has no connection to STEP.

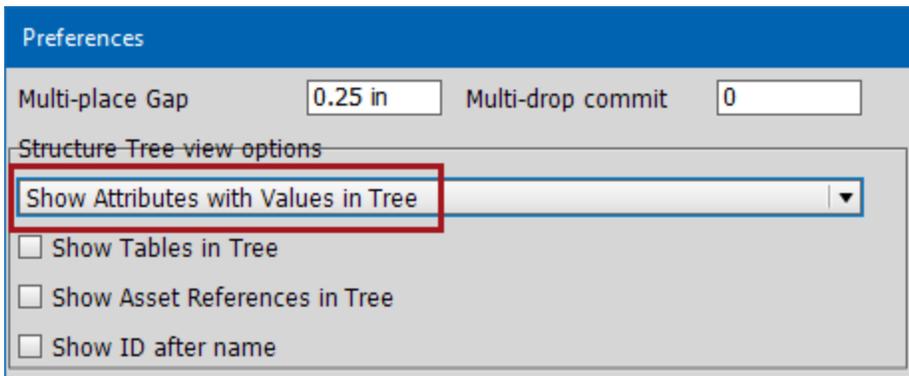
Attributes are mounted from the **STEP Structure View** palette, and images are mounted from the **STEP Images** palette.

This topic assumes that you have a basic familiarity with these palettes and have already created the publication template / mounting page onto which you will be mounting data.

Mounting Attributes Without a Product Template

In order to mount attributes onto the page, they must first be visible within the STEP Structure View palette. The following steps explain how to display the attributes in the STEP Structure View tree, then how to drag them onto the InDesign page.

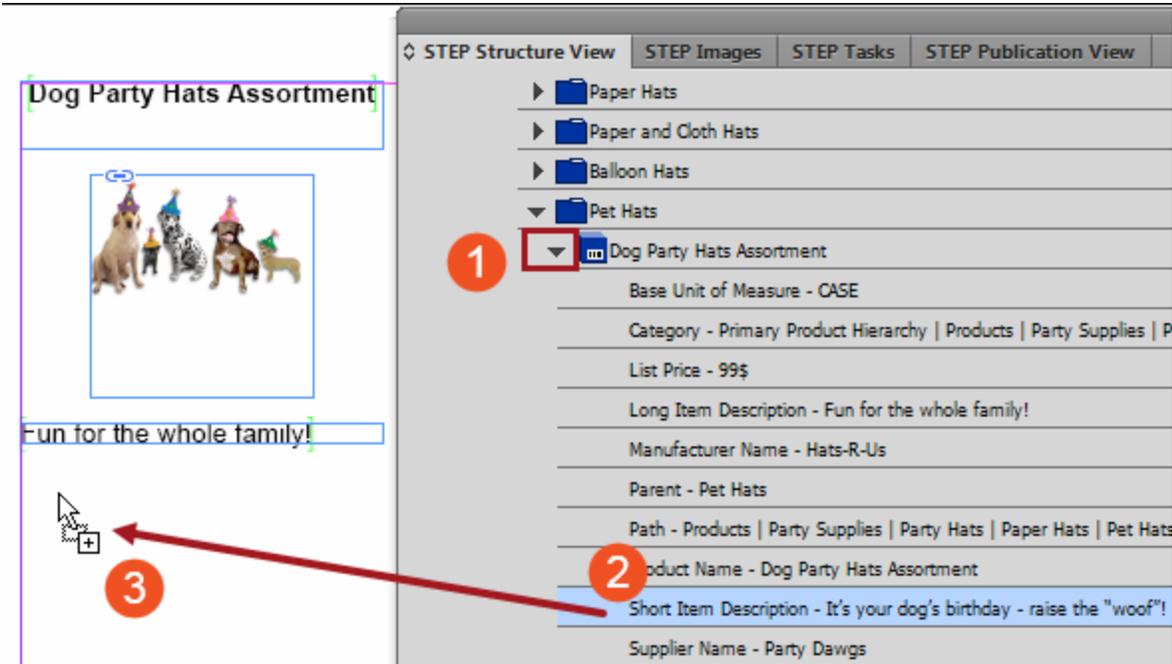
1. In InDesign, navigate to STEP > Preferences to open the **Preferences** menu.
2. Select **Show Attributes with Values in Tree** from the topmost dropdown list on the dialog, then click **OK**.



3. Open the STEP Structure View palette by navigating to Window > **STEP Structure View**.
4. In the STEP Structure View tree, locate the object that contains the attribute(s) with the values that you would like to mount onto the page. This can be any object type that has linked attributes and is not limited to product objects.

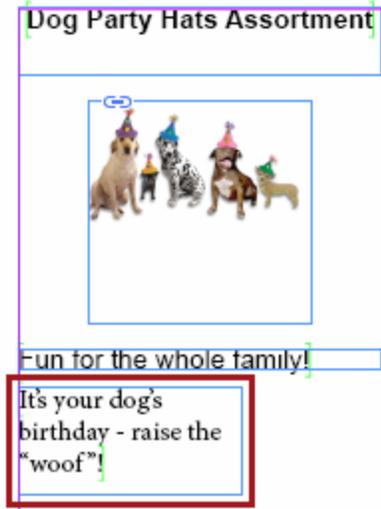
To locate an object in the STEP Structure View, either browse through the tree or click on the magnifying glass icon in the lower left corner of the palette to display the **Search** dialog. The Search dialog can also be accessed by clicking the **Options** dropdown arrow in the upper right corner of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

5. Click the black arrow next to the object to expand the list of linked attributes with values.
6. With your publication template or mounting page open, select the attribute whose value you would like to mount onto the page, then hold down the left mouse button as you drag it onto the InDesign page.



Note: Attributes can be multi-selected by holding the Ctrl or Shift key while making selections, but all attribute values will mount into a single text frame.

- 7. Release your mouse button where you would like to drop the content.
- 8. A frame is created on the page containing the attribute value.

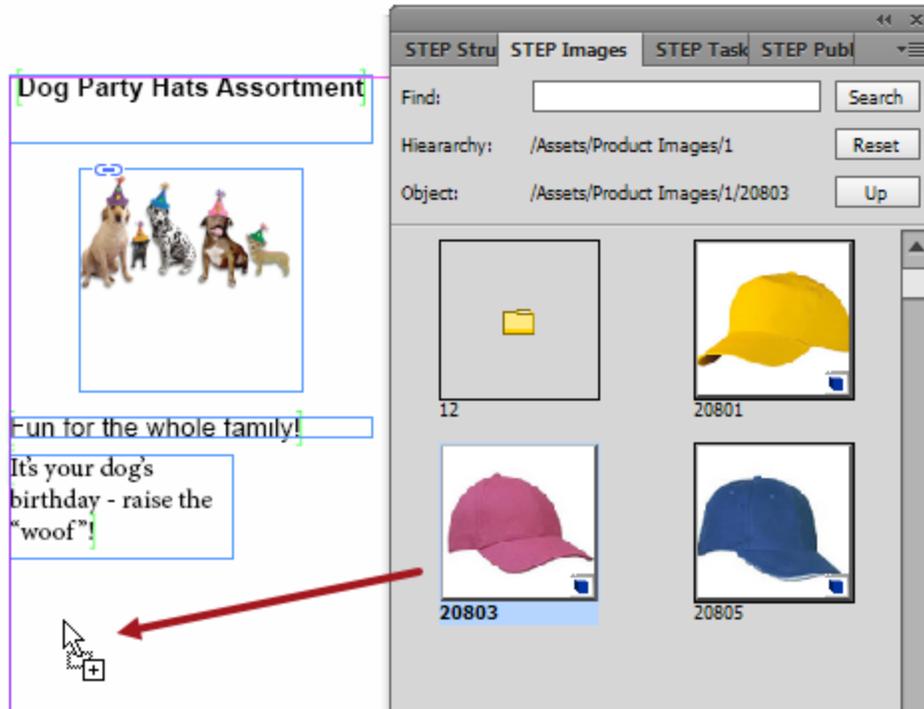


Alternatively, you may draw a text frame on the InDesign page using the Type tool (T) before dragging over the attribute value. The value is dragged and dropped onto the page in the same manner as described in the previous instructions, except the attribute is dropped into the preexisting frame instead of onto a blank area on the page.

Mounting Images Without a Product Template

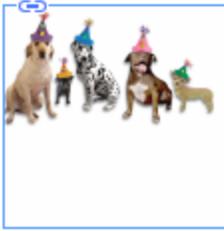
Images are mounted directly from the STEP Images palette for reasons such as full-page ads in catalogs that consist of a single image that do not need to be mounted with a product template.

1. Open the STEP Images palette by navigating to Window > **STEP Images**.
2. Locate the image that you would like to mount by searching or browsing in the palette. Only one image at a time can be mounted from the STEP Images palette.
3. Select the image, then hold down the left button of your mouse as you drag the image onto the page.



4. Let go of the mouse button where you would like to drop the image.
5. The image is placed on the page.

Dog Party Hats Assortment



Fun for the whole family!

It's your dog's
birthday - raise the
"woof"!



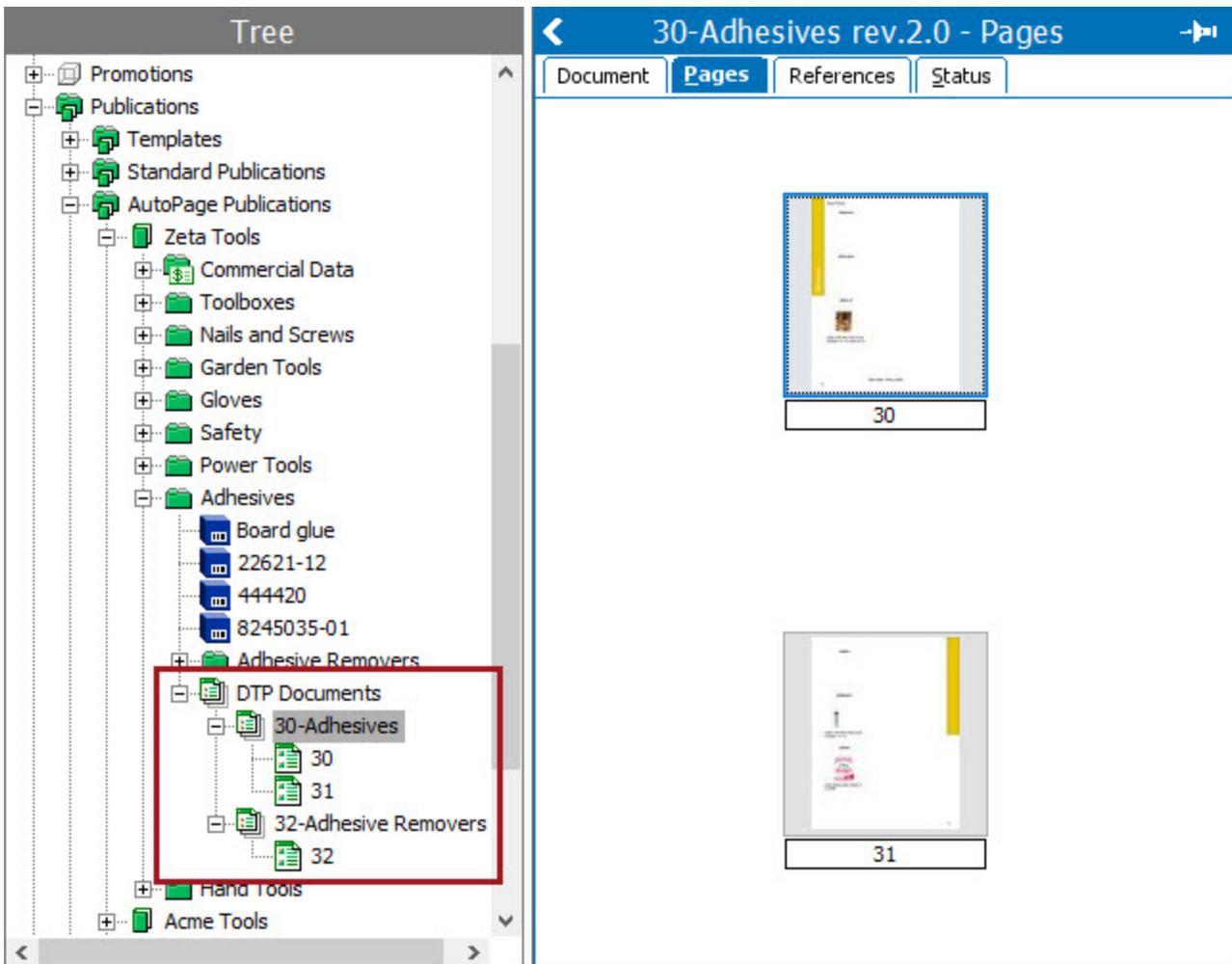
Note: Images dragged onto pages from the STEP Images palette are placed onto the page at the actual size that they exist in STEP.

Saving Finalized InDesign Documents to STEP

Another important feature of STEP'n'design is the ability to save finalized InDesign documents back to STEP. One of the primary reasons to save InDesign documents to STEP is to enable users across an organization or across geography to access these documents, in addition to the following advantages:

Document Visibility in STEP

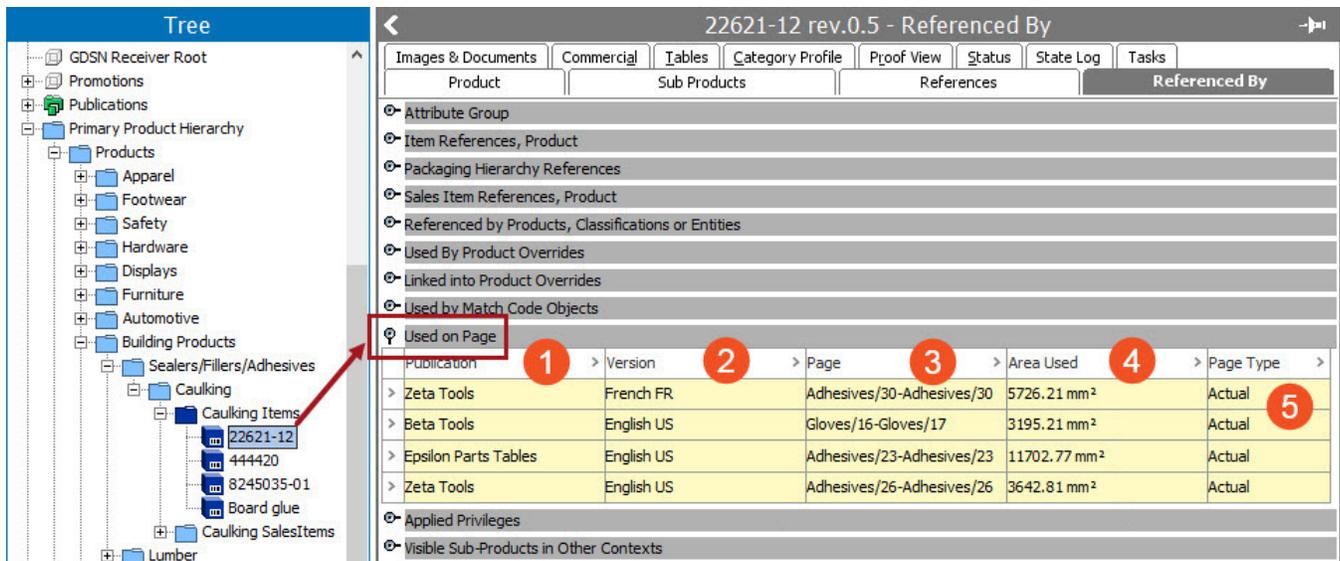
The documents become visible in STEP, allowing users who do not use InDesign to view the pages in the workbench.



'Referenced By' Product Data for Publications

It is possible to view a **product** in STEP and view the following publication-related information on the **Referenced By** tab under the **Used on Page** flipper. The numbers in the below list correspond with the numbers in the screenshot directly below the list.

1. Which **publications** the product appears in
2. Which **versions** of these publications the product appears in
3. What **page(s)** the product appears in within these publications
4. How much **space** the product takes up on the page(s) on which it appears (Area Used)
5. Whether the page type is Actual (a mounted InDesign document) or Planned (a Flatplanner planned page).



Page Data

It is possible to look at a **page** in STEP and view the following information on the **Page Data** tab. The numbers in the below list correspond with the numbers in the screenshot directly below the list.

1. Thumbnail preview of the InDesign page
2. Page description:
 - STEP ID and Name
 - Date created (when the document was saved to STEP)
 - **Status:** If the page is in a Flatplanner workflow, the status will change from Unassigned to the user name to which the DTP page is assigned.
 - Page number
 - **Overset:** If the page contains text or frames with overset content, meaning there is content on the page that does not fit in one or more frames, then the value will be 'Yes'.
3. The list of **products** used on the page and the space used by each product
4. The list of **classifications** used on the page (if any) and the space used by each classification
5. The list of **images** used on the page

Other Advantages

- It is possible to reuse product layouts when working with STEP Flatplanner. See **Reusing Saved Layouts** in the **Flatplanner** documentation for more information.
- It is possible to create **indexes** that list the page numbers of all mounted objects in the publication. See the **Creating Document Indexes** topic for more information.

Saving a Mounted Document to STEP

Once you have finalized your mounted page in InDesign, the typical next step is to save it back to STEP.

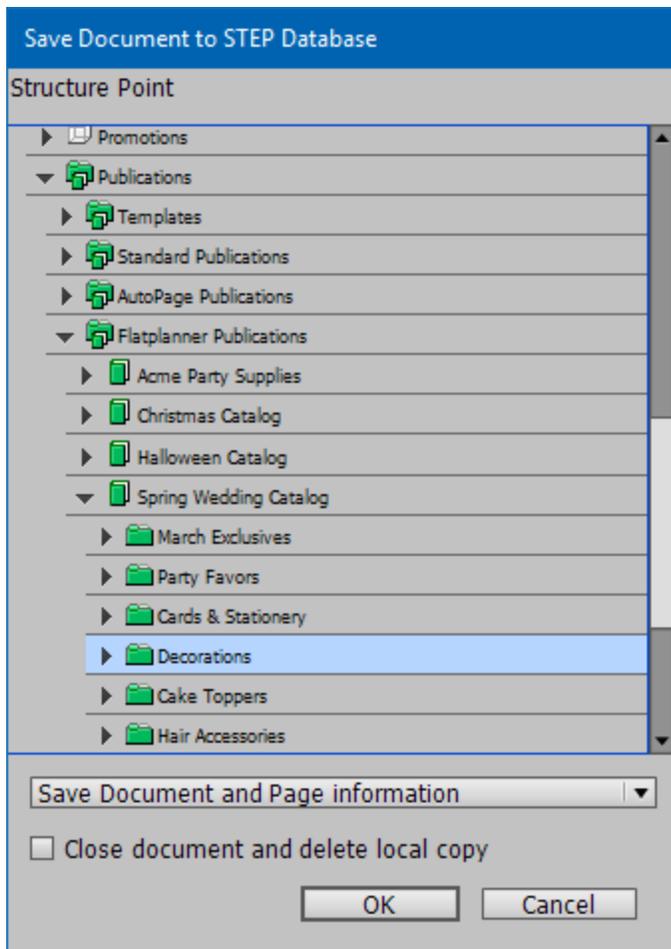
Though it is optional to save mounted InDesign documents back to STEP, these documents must exist in STEP in order to take full advantage of STEP's publishing capabilities, such as extraction of product indexes and calculation of space usage.

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

1. With your mounted document open in InDesign, first save it to your computer's hard drive.

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

2. Next, navigate to STEP > **Save Document to DB** from the top of the InDesign interface.
3. In the **Save Document to STEP Database** dialog box that displays, the section folder from which you mounted your planned page should be automatically selected. If not, navigate to the correct section.



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

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

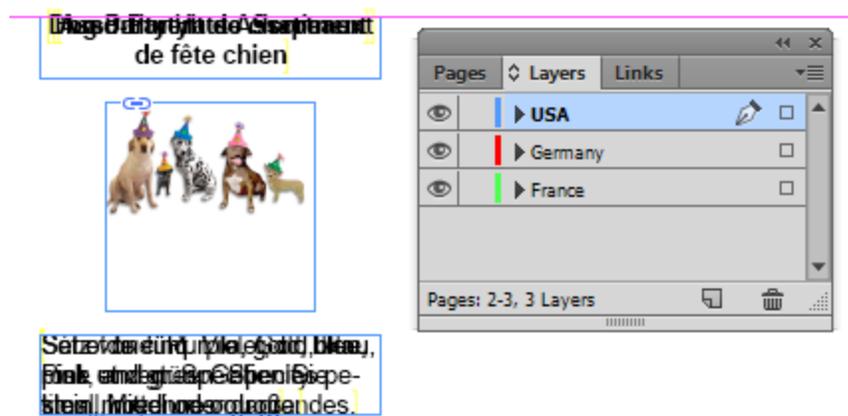
Select **Save Page Information** if you would only like to save page information into STEP. This option will save a thumbnail of your page to STEP but not the actual InDesign page itself. Some users may prefer this option in order to save space on their STEP application server.

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

Working With Version Layers

This documentation section describes how to work with version layers when creating publications in STEP'n'design. Both the STEP database and STEP'n'design are capable of supporting multi-dimensional product data. In STEP publications, these multi-dimensional views are configured as publication **versions** and are typically modeled around specific language and country views of data. Versions may also be created to support currency zones, vertical markets, or different types of catalogs. Therefore, product data in STEP must be organized into different versions in a publication.

The following image shows an example of a product mounted in three languages simultaneously onto the same InDesign page. Each layer in the InDesign document corresponds to a publication version. Since all three layers are made visible with the eye icon on the left of the layer, they will appear overlapping. In use, only one language will show based on the current context.



This topic assumes the following:

- Basic understanding of standard InDesign layers functionality
- An understanding of publication versions (see **Creating and Removing a Publication Version** in the **Getting Started / STEP User Guide** documentation for more information on versions)

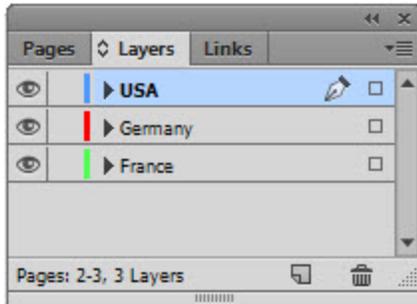
Using Version Layers

Layers are used typically for 'black plate' language and pricing content. For example, an English US layer will contain US English textual content; a French layer will contain French content, and so on. Layers are most commonly used with publications created in Flatplanner and AutoPage, although layers may also be used for standard STEP'n'design ('drag and drop') publications. Layers are useful for mounting all language versions at once, in order to save time on manual duplication of layers or creating multiple publications for different languages.

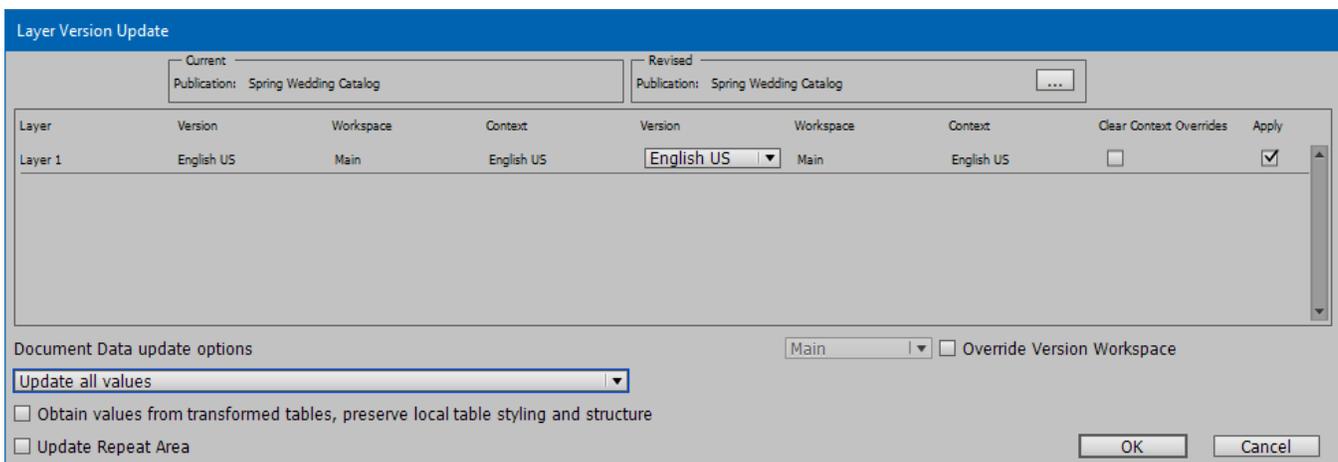
However, all layers do not need to be mounted at once. A single layer can be mapped first, e.g., US English. Then, as translated content becomes available, the layer can be duplicated, and the content on the duplicated layer can be updated using Layer Version Update in order to replace all the US English content with content from another language, e.g. French.

Viewing Version Layers

From within InDesign, you can inspect the different versions you will be mounting by clicking the **Layers** tab (Window menu/Layers or F7). Each version has its own layer (see example in illustration below). If multiple versions share a layer, you will still only see one layer here, as this will match the name in the layer mapping.



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



Creating Layers in Templates

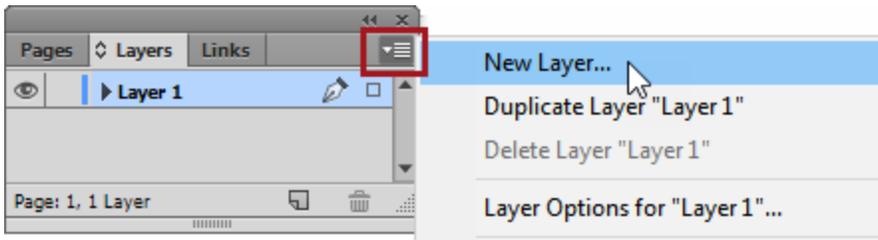
In order to work with multi-dimensional data in STEP'n'design, both **product templates** and **publication templates** must be configured with InDesign **layers**. Standard practice is for there to be a 1-to-1 relationship between publication versions and layers. Though less common in modern printing, a single layer may also be designated as the repository for product images, while the additional layers each correspond to publication version but contain black text only. This is to accommodate what is known in the printing industry as 'fifth-black' plate change.

Creating a New Layer

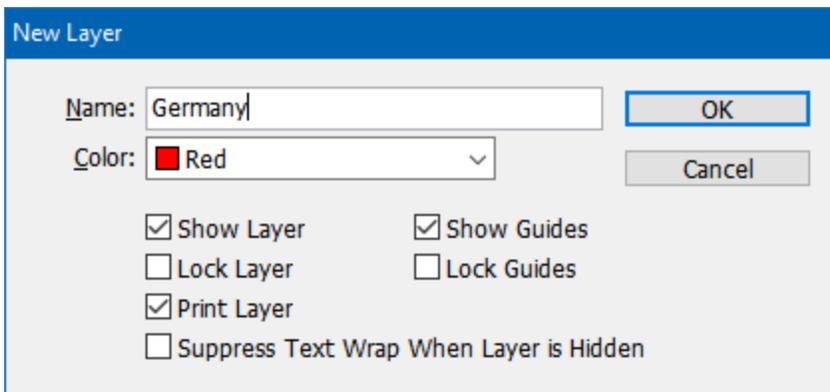
The process for creating a new layer is identical for both product templates and publication templates since both are standard InDesign documents. The following steps describe standard InDesign functionality.

By default, all new InDesign documents already have one layer defined called 'Layer 1'. In order to define additional layers, either new layers must be created, or the original layer can be duplicated.

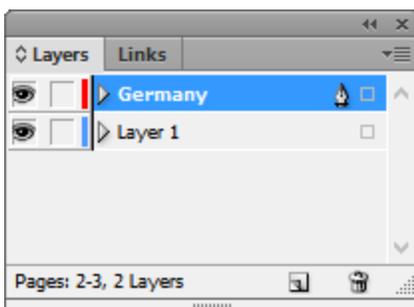
1. Open your product template in InDesign.
2. In InDesign, navigate to Window > **Layers** (or click F7) to open the InDesign **Layers** panel.
3. On the Layers panel, expand the Options menu and click **New Layer**. Or, right-click on the layer name and select **New Layer**.



4. In the **New Layer** dialog, type the name for the new layer in the **Name** field.



5. To change the color of the layer, select a color from the **Color** dropdown. The layer color determines what color the frames will appear on your layer. Best practice is to have a different color for each layer so they can be easily differentiated.
6. Click **OK** to close the New Layer dialog and finish creating the layer.

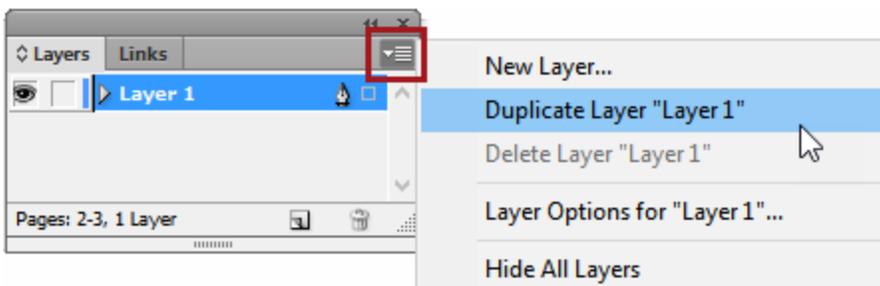


Duplicating a Layer

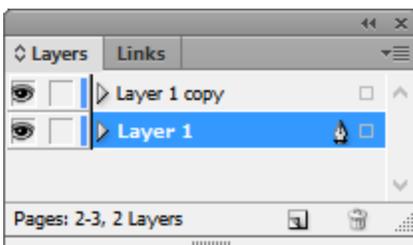
Duplicating a layer follows a similar process to creating a new layer. You may choose to duplicate a layer either as an alternative to creating a new layer or as a method to copy all contents of a layer that already contains mounted products. A layer with preexisting mounted content can be duplicated so that the duplicated pages can then be updated with content from a different publication version. For more information on this, see the **Changing a Version Layer** topic for more information.

To duplicate a layer:

1. Open your product template in InDesign.
2. In InDesign, navigate to Window > **Layers** (or click F7) to open the InDesign **Layers** panel.
3. On the Layers panel, expand the Options menu and click **Duplicate Layer**. Or, right-click on the layer name and select Duplicate Layer.



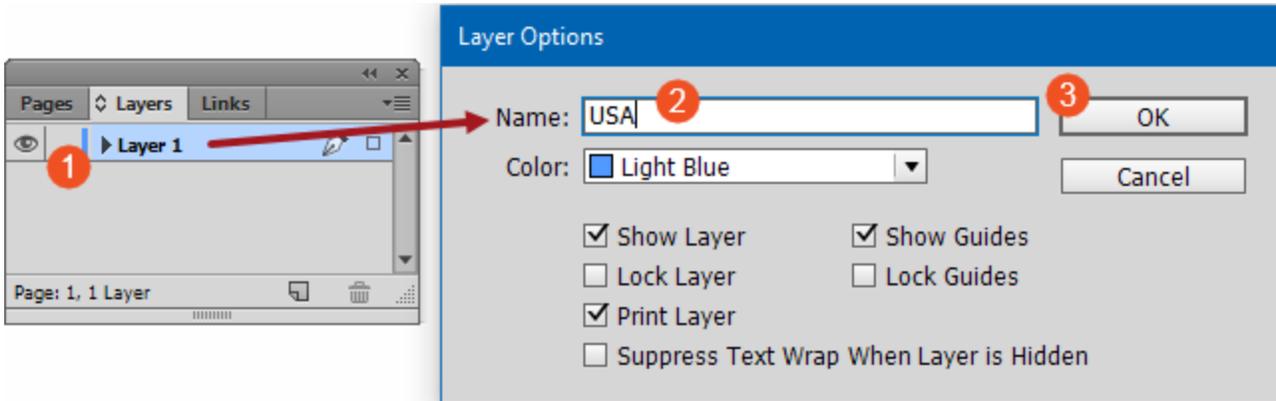
4. The layer is duplicated.



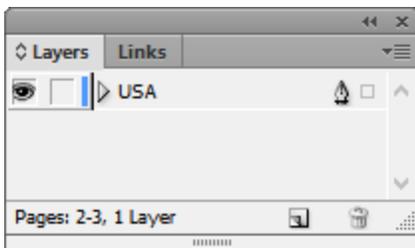
Changing the Name of a Layer

The process for renaming a new layer is also identical for both product templates and publication templates since both are standard InDesign documents. The following steps describe standard InDesign functionality.

1. Open your product template in InDesign.
2. In InDesign, navigate to Window > **Layers** (or click F7) to open the InDesign **Layers** panel.
3. Double click on the layer name (in this example, Layer 1) to open the **Layer Options** dialog.
4. Type the new name for your layer in the **Name** field, then click **OK**.



5. The layer is renamed.



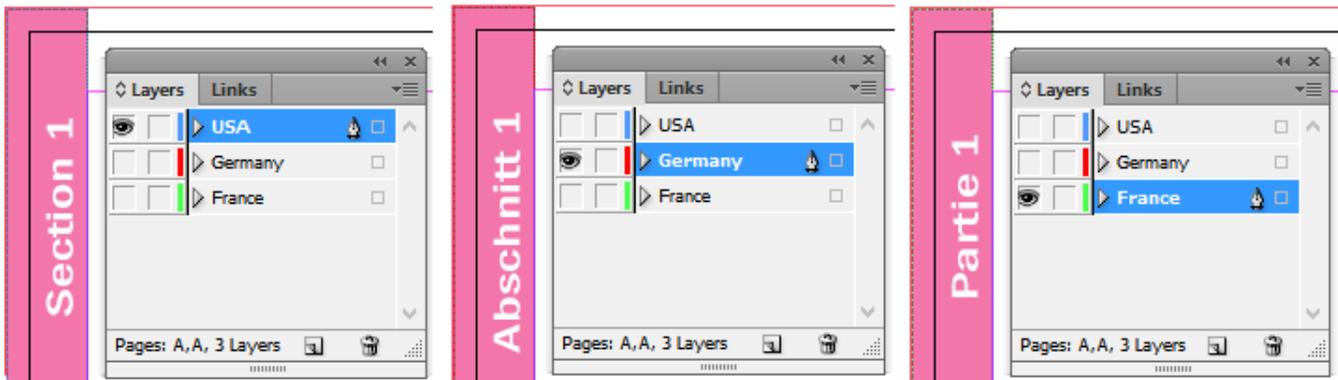
Layers in Publication Templates

When mounting multiple versions onto a publication template, it is not always required to have layers set up on the template beforehand. Layers from the **product template** will be copied across the publication template during product mounting.

However, if you need translated content in the 'furniture' of the publication template—meaning the background elements on the page that are not placed through the product template, such as text on side tabs—then the layers must already be created in the publication template.

The below screenshot shows three views of the same side tab on a publication template as it appears on an English, a German, and a French layer. In this example, the content is not populated by STEP—it is already on the publication template.

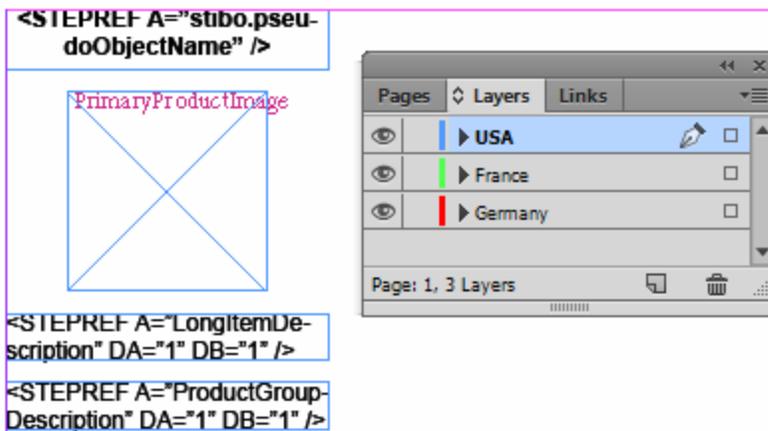
Note: To view an individual layer, click the box in the first column next to the layer that you wish to view. The eye icon will display to indicate that the layer is visible. To hide the layer, click the eye icon to make it disappear.



It is possible to populate publication template background elements with content from STEP by using STEP tags on the publication template, but this can only be done using Flatplanner or AutoPage. For more information, see **Using the getInheritedPublicationValue Function in Flatplanner** in the **Flatplanner** documentation and **Using the getInheritedPublicationValue Function in AutoPage** topic in the **AutoPage** documentation.

Layers in Product Templates

When mounting multiple publication versions at one time (typically in Flatplanner and AutoPage), it is mandatory that product templates contain layers. As stated in the previous section of this topic, layers in *publication* templates are not always required since the layers from the product template will be copied across to the page when mounting. In other words, when a document is mounted using a product template that contains layers, the same layers will be automatically created in the publication template.

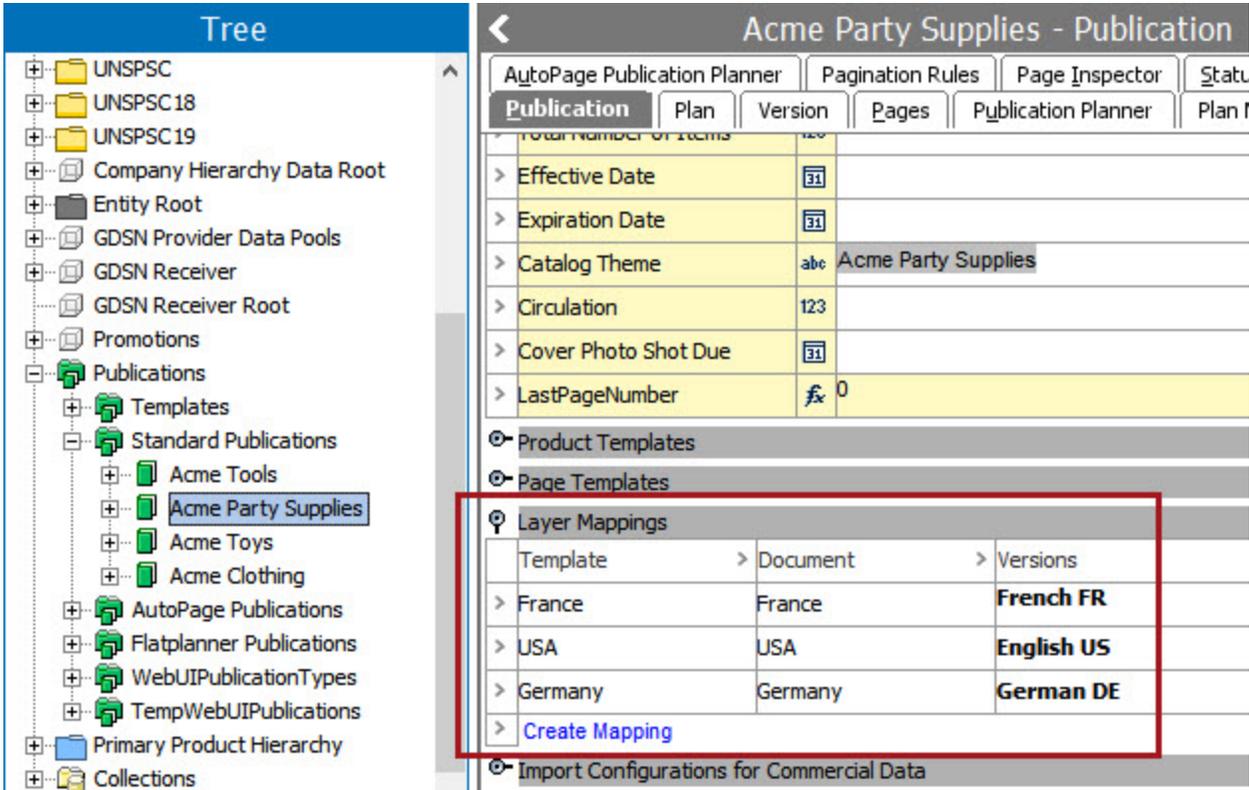


Mapping Versions to Layers

If you plan to set up a publication in which you would like all publication versions to mount onto the InDesign publication template / mounting page at the same time, you must define which layer each publication version will be placed onto. This definition is accomplished through **Layer Mappings**. Layer mapping is required when the intent is to mount multiple versions onto multiple layers at one time and applies to multi-versioned publications created with any STEP Publisher component—STEP'n'design (drag and drop), Flatplanner, and AutoPage.

The following screenshot shows a publication with three mapped versions.

Note: If you have a single-version publication, you do not need to create layer mapping.

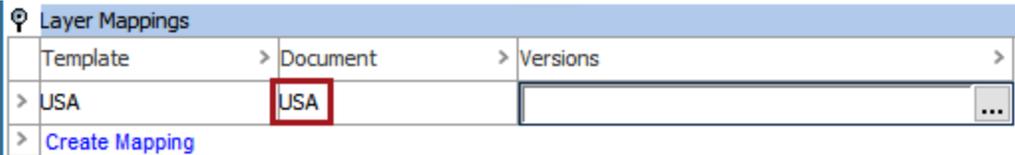


Steps to map publication versions to layers are as follows:

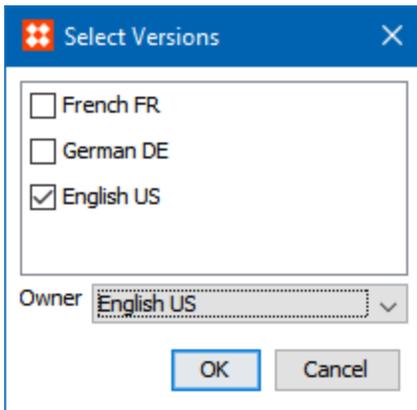
1. In the Tree, navigate to the relevant publication, then click the **Publication** tab.
2. Expand the **Layer Mappings** section, then click 'Create Mapping.'
3. In the blank row that is created after clicking 'Create Mapping,' enter the name of one of the layers from your **product template** in the **Template** column. This field is case sensitive.



4. In the **Document** column, enter the name of the corresponding layer in the publication template / mounting document. Best practice is for the names of the layers to match on both templates. If the publication template does not already have layers, the layers will be created from the product template when a product is mounted. The created layers will be given the names provided in the layer mapping.



5. In the **Versions** column, click the ellipsis button (...).
6. Select the relevant version(s) in the **Select Versions** dialog.



7. By default, the selected version will also be the *owner* of the layer. If you map more than one version to a layer, you must designate one of these versions as the owner from the **Owner** dropdown list. See the following section of this topic for more information on layer ownership.
8. Click **OK**.
9. To create more layer mappings, repeat steps 1-8.

Versions Owning Layers

In almost all cases, when mapping publication versions to InDesign page layers, there is a 1-to-1 relationship between publication versions and layers. The concept of a version 'owning' a layer is related to the idea of the 'fifth black plate' change print process that can be used to reduce print costs.

Note: The Owner is the version that will be used when mounting in InDesign. However, content on the layer is shared by the other versions that are mapped to it and will appear in the PDF output of the document.

In commercial printing, color printing presses produce pages using four plates, with each plate containing a different color of ink—Cyan, Magenta, Yellow, and Black (referred to as CMYK). Publishers use a 'fifth black' color when the text and/or prices are different for each publication version. It is more cost-effective for publishers to first print their books using the CMYK process but excluding the text. Then the publications are 'overprinted' with a fifth black plate that contains only the text portion, and a different fifth black plate is used for each text version.

Since most printing houses these days have the ability to separate these layers digitally from PDFs, it is not a requirement to map version layers in STEP to precisely match the way the printer will create the fifth black plates. Specifically, it is OK if color elements (such as images or background colors) are included in every layer of the InDesign document (and subsequently the PDF that is created from it), as long as these elements are placed in an identical location within each layer.

The following use cases describe more traditional layer mappings based on the idea of mapping text ('fifth black') to separate layers than images.

'Fifth Black' Use Cases

A basic use case for 'fifth black' layer mapping is as follows:

A catalog is being produced in both the U.S. and the U.K. The desired layers are:

- An **image** layer with the same color pictures in both countries
- A US **text** and **price** content layer
- A UK **text** and **price** content layer

In this instance, the **product template** would have two layers:

- Image Layer
- Text Layer (which contains your region text as well as the price)

The layer mapping would be as follows. Note that a single layer from a product template—in this case, **Text**—can be mapped to mount onto more than one layer in the publication template.

Template	Document	Owner version	Other Version
Image	Image	US	UK
Text	US-Text	US	
Text	UK-Text	UK	

The layer mapping in this example will resemble the following. Versions that own the layers are in **bold text**.

Layer Mappings		
Template	Document	Versions
> Image	Image	English US ; English UK
> Text	US-Text	English US
> Text	UK-Text	English UK
>	Create Mapping	

A more complex use case for 'fifth black' layer mapping is as follows:

A catalog is being produced in both France and Germany. The desired layers are:

- An **image** layer with the same color pictures in both countries
- A German **text** content layer
- A French **text** content layer
- A Euro **price** layer

In this instance, the **product template** would have three layers:

- Image Layer
- Text Layer
- Price Layer

The layer mapping would be as follows. Note that a single layer from a product template—in this case, **Text**—can be mapped to mount onto more than one layer in the publication template.

Template	Document	Owner version	Other Version
Image	Image	DE	FR
Text	DE-Text	DE	
Text	FR-Text	FR	
Price	Price	DE	FR

The layer mapping in this example will resemble the following.

Layer Mappings		
Template	Document	Versions
> Image	Image	German DE; French FR
> Text	FR-Text	French FR
> Price	Price	German DE; French FR
> Text	DE-Text	German DE
>	Create Mapping	

Mounting Products to Version Layers

One advantage to using version layers in a publication is the ability to mount content from all publication versions in one operation. This is typically only used for Flatplanner and AutoPage publications, but multiple versions can also be mounted in one operation using the standard 'drag-and-drop' functionality of STEP'n'design.

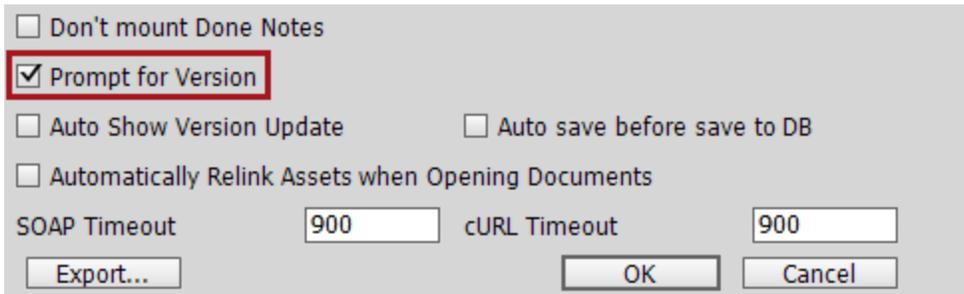
Layers are useful for mounting all language versions at once in order to save time on manual duplication of layers or creating multiple publications for different languages.

However, all layers do not need to be mounted at once. A single layer can be mapped first, e.g., US English. Then, as translated content becomes available, the layer can be duplicated, and the content on the duplicated layer can be updated using Layer Version Update in order to replace all the US English content with content from another language, e.g. French. All methods require layer mapping.

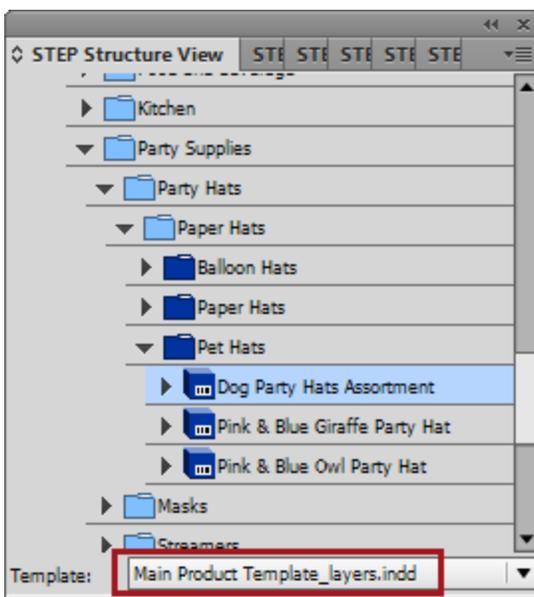
Mounting Multiple Versions in STEP'n'design

Multiple versions can be mounted to a page in a single drag and drop operation by multi-selecting the versions you would like to mount when prompted to choose a version.

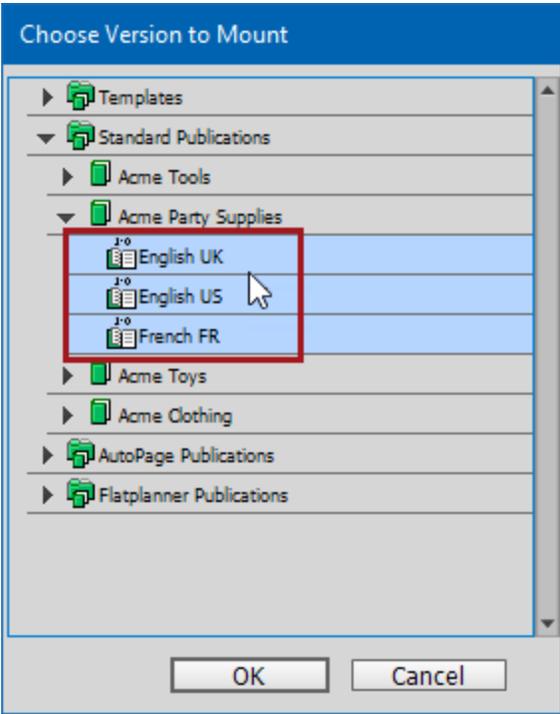
1. Open InDesign, then navigate to **STEP > Preferences** to open the **Preferences** menu.
2. Tick the **Prompt for Version** box, then click **OK** to close the Preferences menu.



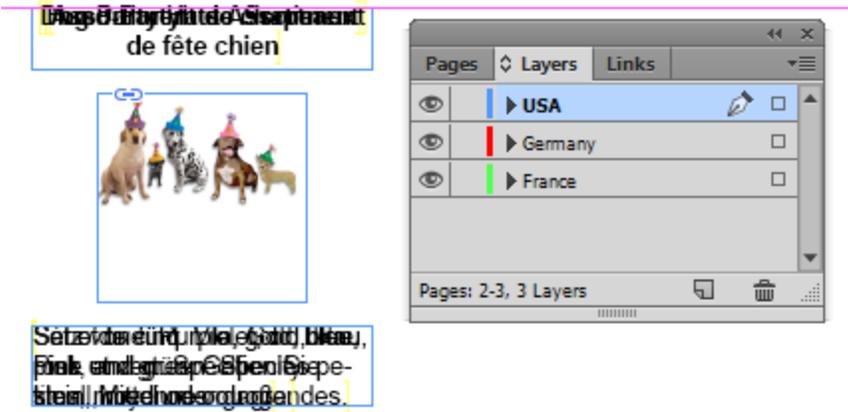
3. Open the STEP Structure View palette by navigating to **Window > STEP Structure View**.
4. Ensure that the correct layer-containing product template is selected in the **Template** dropdown in the palette.



5. In the STEP Structure View tree, locate the product object that you would like to mount, then hold down your left mouse button as you drag it onto the publication template.
6. Release the mouse button where you would like to drop the product onto the page.
7. In the **Choose Version to Mount** dialog that displays, multi-select the versions that you would like to mount by holding **Ctrl** or **Shift** while making your selections, then click **OK**.

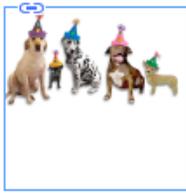


8. The product is mounted on the layers of the publication template.

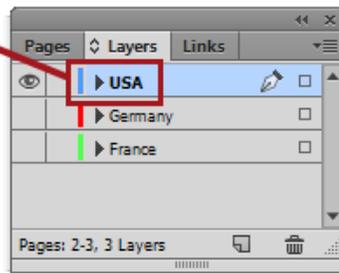


The following screenshots show how the content looks on the page when viewed one layer at a time.

Dog Party Hats Assortment



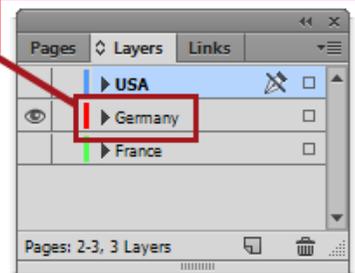
Set of five. Purple, gold, blue, pink, and green. Specify small, medium or large.



Hund-Partyhute-Sortiment



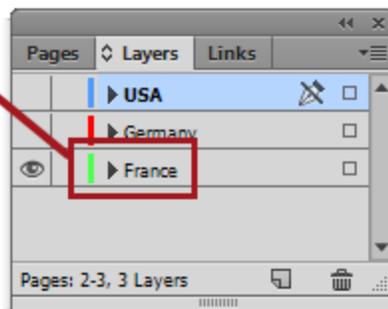
Satz von fünf. Lila, Gold, blau, Pink und grün. Geben Sie klein, Mittel oder groß



Assortiment de chapeaux de fête chien



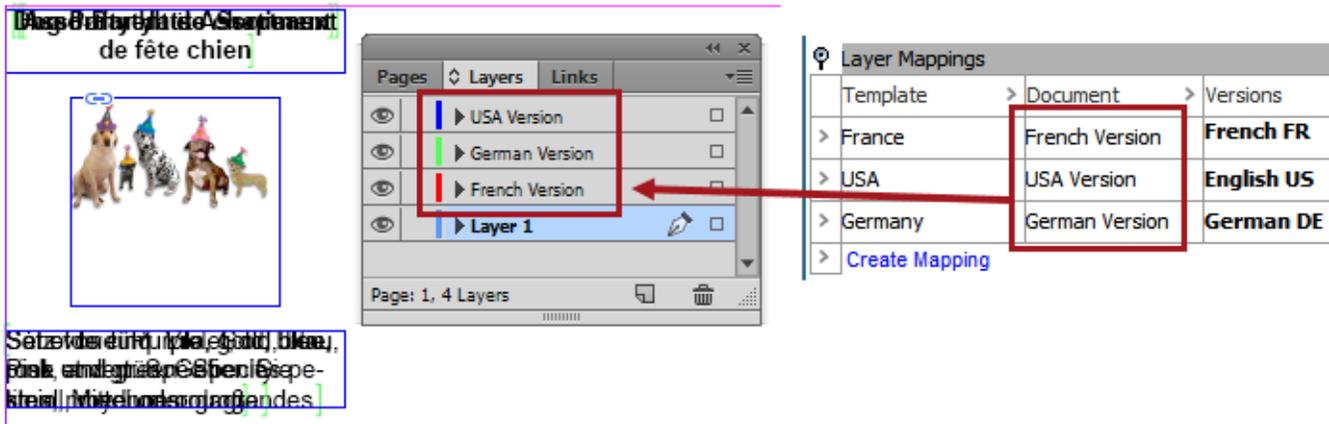
Sène de cinq. Violet, or, bleu, rose et vert. Spécifier les petites, moyennes ou grandes.



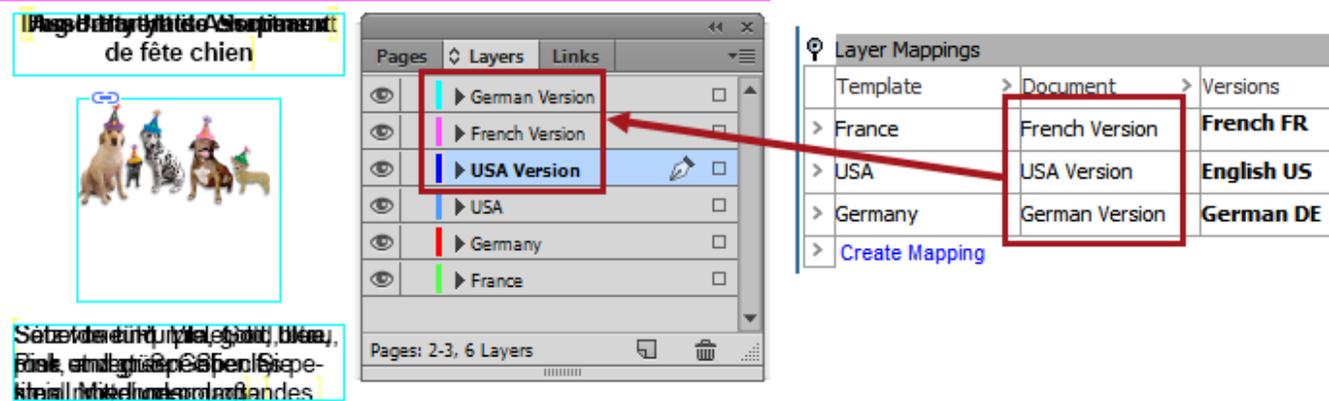
Working With Preexisting Layers and Newly Created Layers

If there are preexisting layers in your publication template and the layer names *exactly* match the name of the layers mapped in the **Document** column of the layer mappings in STEP, then the publication versions will mount on the preexisting mapped layers. If the names of the layers on the publication template do *not* match those in STEP—or if there are no layers to begin with in the publication template—then the layers will be created and given the names provided in the layer mappings.

The following image shows a product mounted on a publication template that did not already have layers other than Layer 1. The product was mounted from a product template containing layers named France, USA, and Germany. Because of the **Document** layer names provided in STEP, the layers were created in the publication template and named 'French Version', 'USA Version', and 'German Version'.



This image shows a similar scenario, except there were already layers on the publication template. However, the content was mounted on three newly created layers since the names of the preexisting layers did not match those in the **Document** column. No content was mounted on the existing layers.



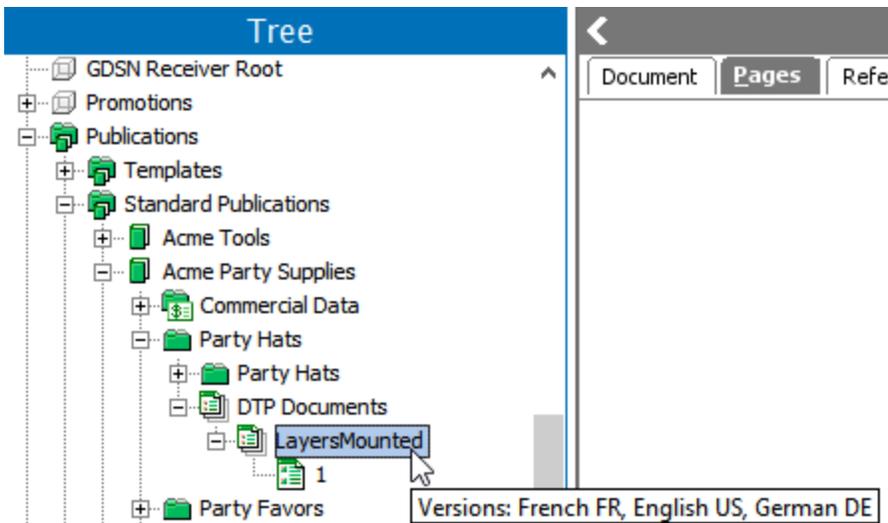
Mounting Multiple Versions in STEP Flatplanner and STEP AutoPage

A huge advantage of using STEP Flatplanner and STEP AutoPage is the ability to mount all publication versions in one operation for entire sections of a publication or even an entire publication at once. Layers and versions are mapped for Flatplanner and AutoPage publications in an identical fashion as that described in this topic.

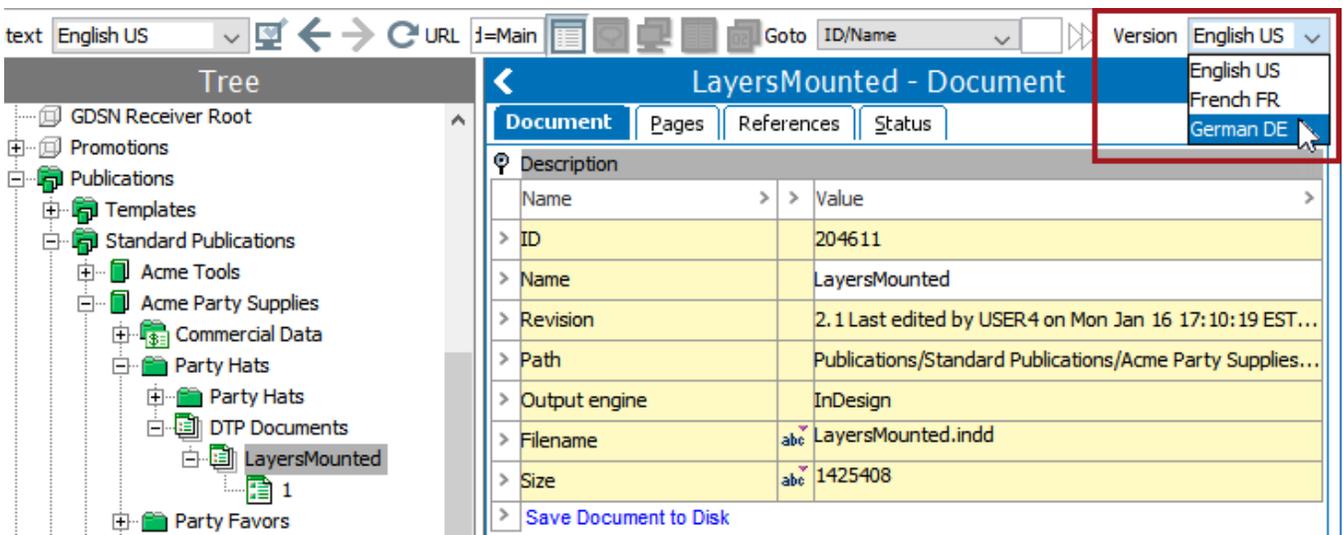
Viewing Version Layers in STEP

When layered InDesign documents are saved to STEP, the individual layers can also be viewed in the workbench based on their publication versions, allowing users to view the different versions without having to access the documents in InDesign.

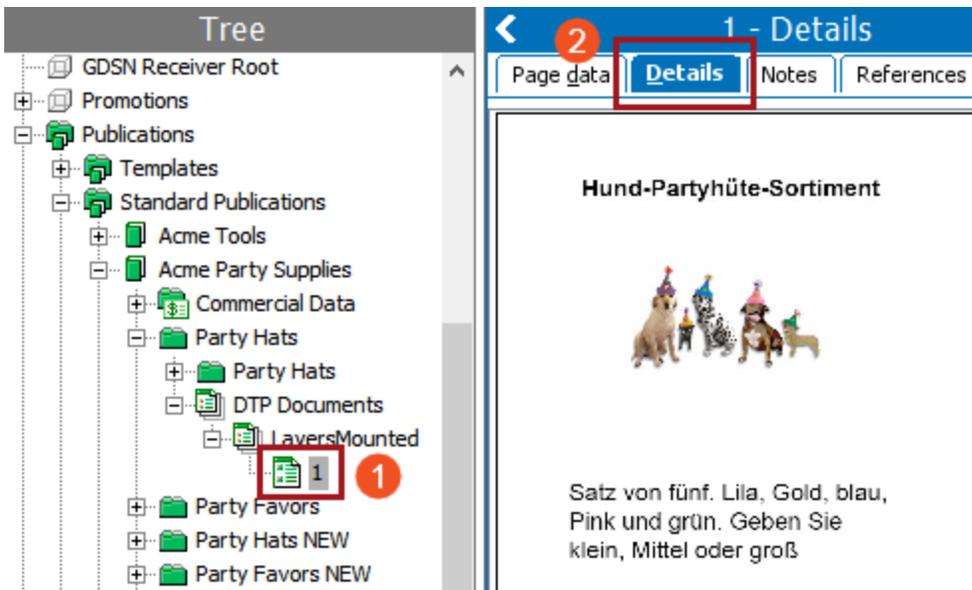
1. Save your finalized InDesign document to STEP by following the instructions outlined in the **Saving Finalized InDesign Documents to STEP** topic.
2. In the STEP Workbench, navigate to the DTP document in the Tree. As pictured below, if you hover over the document with your cursor, the versions mounted in the document appear in the hover text.



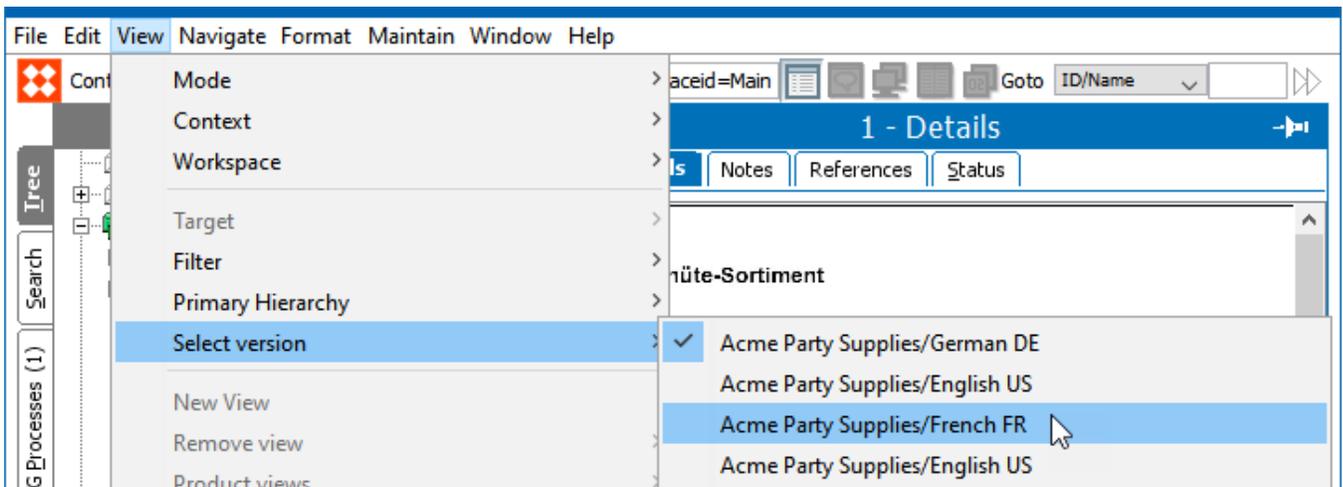
- With the document selected, choose the version you wish to view from the **Version** dropdown in the upper right corner of the workbench.



- Select a page in the DTP document, then click on the **Details** tab to view the mounted page. The below screenshot shows the mounted product in the German DE publication version.



- Alternatively, you can navigate to View > **Select version**, and choose the publication version that you would like to view from the menu.



- After choosing a version from the **Select version** list, return to step 4 above—select a page in the DTP document, then click on the **Details** tab to view the mounted page.

Changing a Version Layer

Changing a version layer in InDesign will force InDesign to re-fetch the data contents for your version from STEP. Changing context / workspace for a certain version layer will potentially affect all data in the selected version layer in the active document.

The reasons for changing the content on a version layer include the following:

- You have finished creating the pages for the master language of your publication and are now ready to duplicate the layer and update the new layer with content from another version of your publication.
- You have finished creating the pages for your publication by using a publication version that is using content from the Main workspace. You now need to update the pages with content from the Approved workspace.
- You want to attach an existing document to another publication.
- You actually want to *avoid* working with layers in your InDesign documents.

Adopting Layout and Content From Another Version

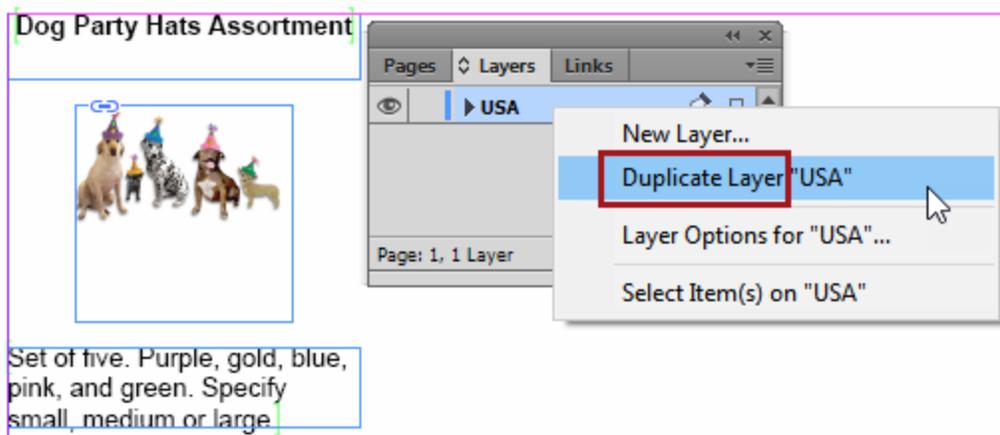
When creating new version layers it is possible to adopt the layout from another publication version—either within the same publication or a different one—then swap out the dimension-dependent content on the page using the **Layer Version Update** feature in STEP'n'design.

A typical workflow for working with version layers in STEP'n'design is that you first create your full master version layer. This means that you mount your products from your first version into your InDesign page or spread. Then you use the features of InDesign to edit the layout of the pages and the products on the pages. Only when you are happy with the way a version's pages look, you will start creating the other version layers. Following this procedure will make it easier for you to let the remaining version layers in a publication reuse the layout you have created on the original mounted pages.

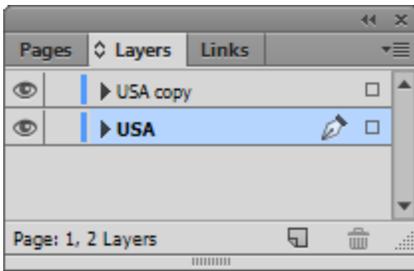
It is possible to duplicate a version layer from the **Layers** panel (opened by navigating to Window > Layers in InDesign, or pressing F7) and then change the version afterward. This way, you keep all your formatting and layout from one version to another within a publication, and you can mount several versions of a publication within the same document.

The following directions are for adding content from a different publication version when working within the *same* publication or from a *different* publication.

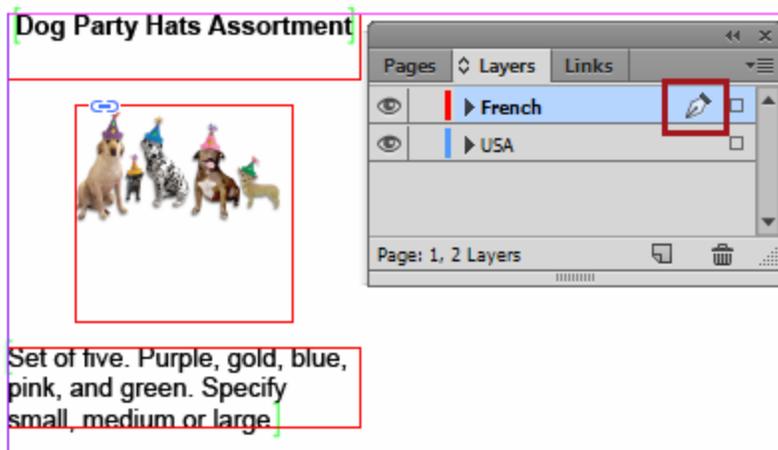
1. Select the relevant version layer in the **Layers** tab, then right-click and select **Duplicate Layer**.



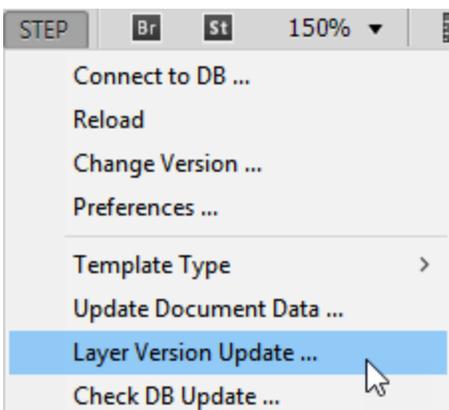
2. The layer is duplicated into a new layer with the name of the original layer followed by the word 'copy'.



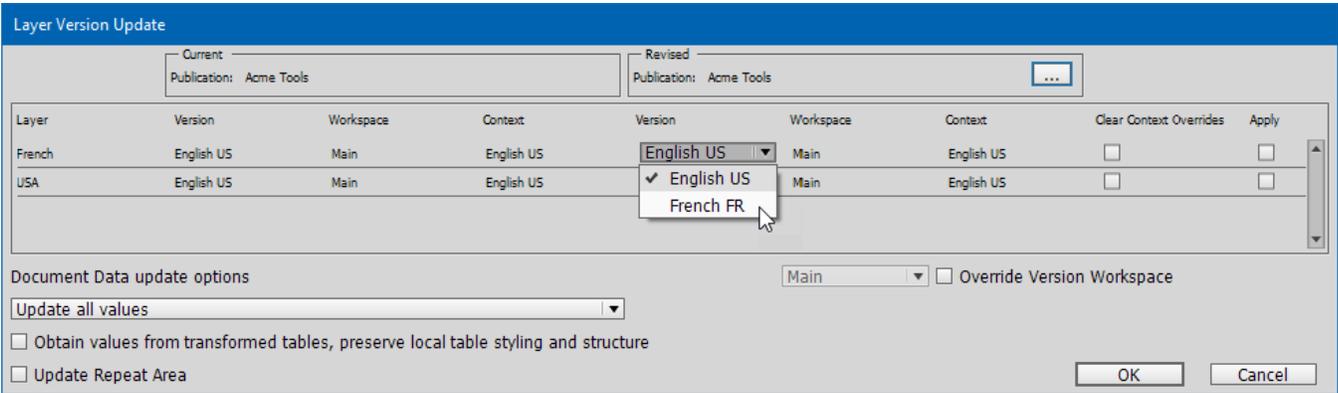
3. Rename the duplicated layer and change its color by following the instructions outlined in the **Creating Layers in Templates** topic.
4. Ensure that you are working on the duplicated layer by making sure that the **pen** icon is visible on the selected layer.



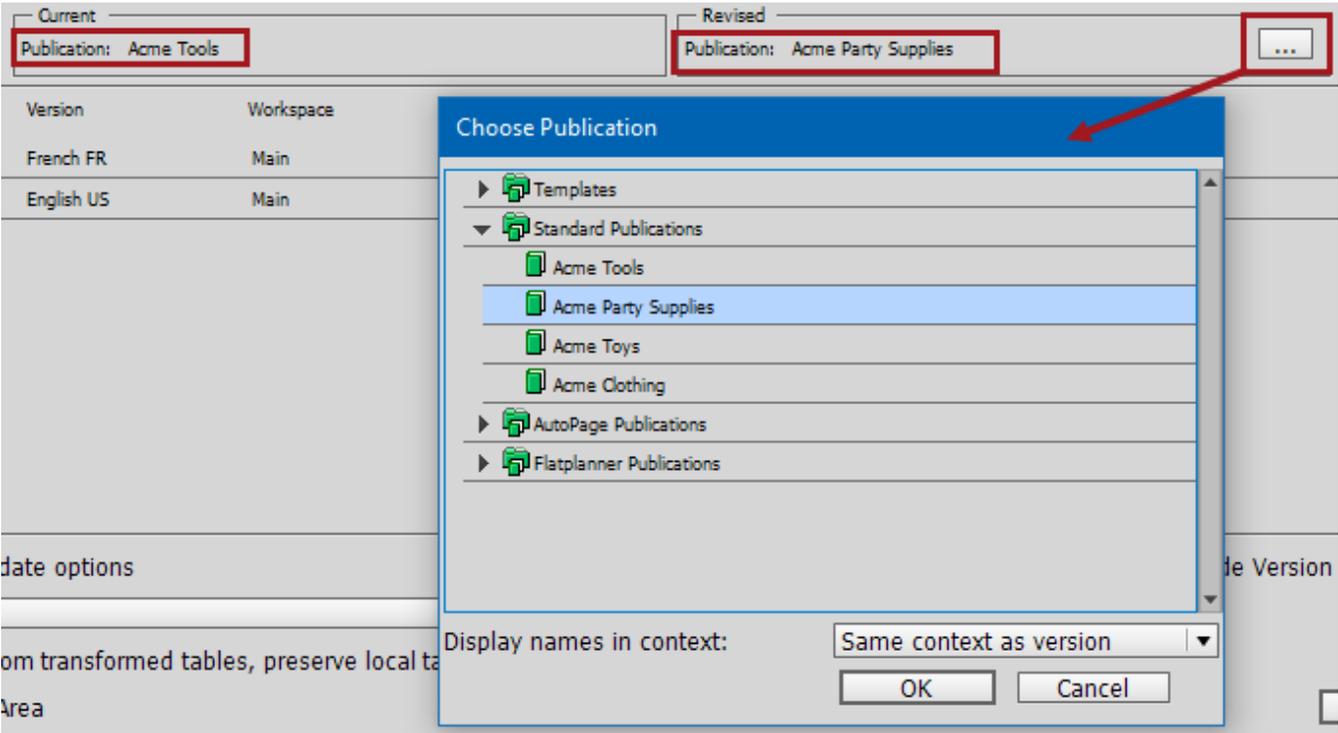
5. Navigate to STEP > **Layer Version Update**.



6. In the **Layer Version Update** dialog, select the version that you would like to update your layer to from the **Version** dropdown list.



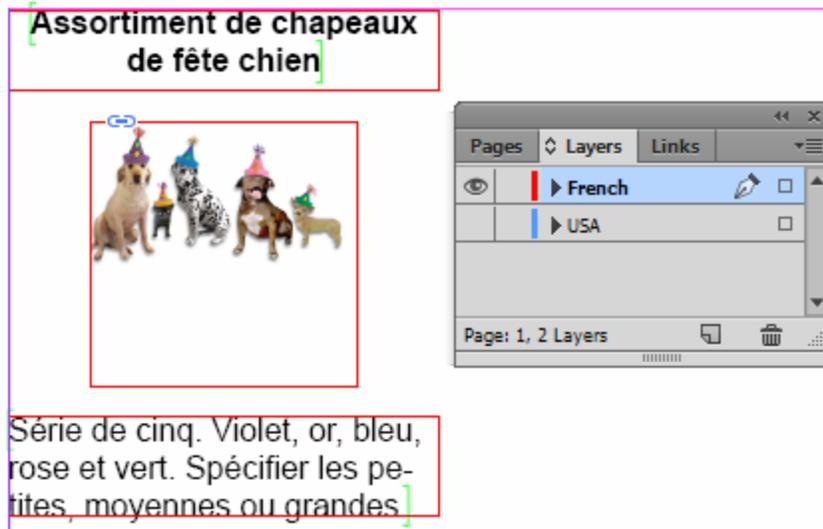
If you wish to use a version from a *different* publication, click the ellipsis button (...) in the 'Revised' field. Select the desired publication from the **Choose Publication** dialog, then click OK. Updating the content with a version from a different publication will allow you to save your mounted pages back to that publication in STEP.



7. Once the new version is selected, the **Apply** checkbox is automatically selected.



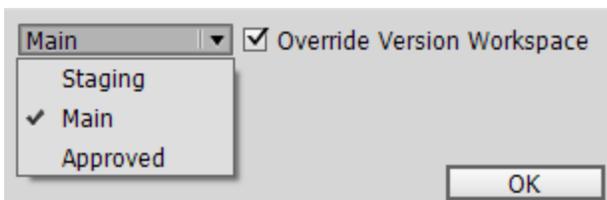
8. Click **OK** to update the layer content.



Additional Options on the Layer Version Update Dialog

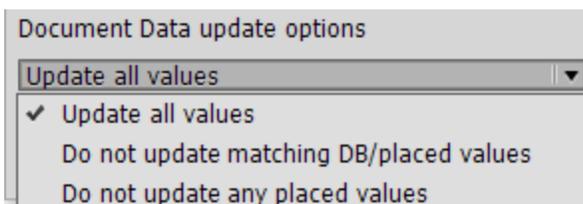
The following options available on the Layer Version Update dialog can be selected to further control how data on the duplicated layer is updated from STEP.

- **Clear Context Overrides:** This option sets the context applied to all items on the layer to that is assigned to the version. If a frame or attribute had a specific context applied through the product template settings on the STEP Template Content palette, these context overrides are removed.
- **Override Version Workspace:** This option swaps the workspace of mounted products. For example, if you built your publication using a publication version that was pulling content from the Main workspace, you can then swap the workspace to the Approved workspace to overwrite the values with those from the Approved workspace. To swap the workspace, tick the 'Override Version Workspace' checkbox and select the workspace from which you would like to pull the content from when you update the content on your layer.



For more information about workspaces, see the **Workspaces** topic in the System Setup / STEP Super User documentation.

- Under the **Document Data update options** label is a dropdown list that contains the following options.



- **Update all values:** Updates all values within the document, even if the values are identical to those in STEP.
- **Do not update matching DB/placed values:** Only updates values that do not match placed values. 'Placed' values refer to the values that exist on the page, which may or may not be different than the values that exist in STEP at the time of the update. The placed values will be compared to the values in STEP and if these two values are identical, no change will occur. This option is a useful way to retain styling made to placed values that match the new values in STEP. This also allows for quicker processing time, since all values do not have to be updated—only the ones that do not match.
- **Do not update any placed values:** Updates the publication and version references of the mounted elements but does not update the page data.
- **Obtain values from transformed tables, preserve local table styling and structure:** If there are mounted tables on the layer that you are updating, checking this box will retain the existing table structures and only update the values within the tables. For example, local styling might have been applied to the table on the InDesign page after its original mount, such as the alteration of row / column sizes or the addition of color shading (either manually or through a previous table transformation). Checking this box ensures that the table structure and formatting remain as-is and only the values are updated. If the box is not checked, the entire table is re-sent from the database (force updated) and any local updates made to the table are lost.
- **Update Repeat Area:** Checking this box will compare the list of objects in STEP applicable to a repeat area to the objects mounted on the page (ignoring order). Additional objects are placed at the end of the list unless deleted items are also found, in which case added items replace the deleted items until there are no more deleted items and the remaining items are then placed at the end of the list.

Alternative to Working With Version Layers

InDesign documents created from a publication that has multiple versions are not required to use layers. A single 'master' publication can be created that contains multiple versions, but layers are not needed because all versions will not be mounted at once.

For example, your business may publish a near-identical catalog in 15 languages, but the 'master' language catalog (e.g., US English) needs to go to press before the translated versions are ready. When the translated content is available in STEP, the single-layer US English catalog can be opened in InDesign, then the layer can be updated with content from a different version within the publication by using the **Layer Version Update** feature. This updated document can then either be saved back to the publication in STEP (as separate files from the original language) or saved locally, outside of STEP.

Creating Document Indexes

This documentation section provides information about creating document indexes from finalized InDesign pages that have been saved back to STEP.

The two most common types of indexes created from STEP are a basic 'stock number' index and a more advanced 'alphabetical index.' These are not official STEP terms, but they are used in this documentation as labels to describe the two most common types of indexes generated from finalized InDesign pages saved into STEP.

Though an index can be generated using standard InDesign features, this is not ideal for a typical STEP-produced product catalog, since, in most cases, using InDesign to generate the index requires a manual selection of index words on each individual page.

Stock Number Indexes

Stock number indexes do not use index words or an index words hierarchy. The following screenshot shows a sample stock number index mounted onto an InDesign page.

Stock No.	Page(s)	Stock No.	Page(s)
121171.....	6	138926.....	2
121177.....	3	138927.....	2
121178.....	15	138928.....	5
121179.....	18	138929.....	3
121184.....	1	138930.....	4
121192.....	12	138931.....	6
121193.....	9	138932.....	7
134413.....	1	138933.....	8
134414.....	5	138934.....	10
134415.....	8	138935.....	10
134416.....	9	138936.....	11
134417.....	13	138937.....	14
134418.....	16	138938.....	13
134419.....	19	138939.....	14
134422.....	4	138940.....	16
134424.....	7	138941.....	17
134426.....	11	138942.....	17
134428.....	12	138943.....	18
134430.....	15	138944.....	20
134432.....	19	138945.....	20

Alphabetical Indexes

Alphabetical indexes require the use of **index words** and an index words hierarchy. The following screenshot shows a sample alphabetical index mounted onto an InDesign page.

Product Index

A

Acid-free
 Bookplates & Protectors..... 52
 Book Tape..... 104
 Page Protectors..... 269

Activity Centers/Mirrors898, 900-903, 939, 947

Activity Tables828-834, 872, 903, 945, 951, 956

ADA Compliant
 Circulation Desks488
 Desks.....488
 Signs559, 578-579
 Tables . 450, 452, 476, 809-812, 814-815, 817-818, 851
 Workstations 809-812, 814-815, 817-818

Address Labels .16-17, 19, 55, 57, 146, 242

Adhesive
 Pockets.....135-139
 Removers..... 116, 237
 Transfer Guns & Tape..... 112

Adhesives
 Glue 114-115, 119, 236-238
 Mounting ... 234, 237-238, 240, 284-285, 551
 Acrylic Tape 114
 Reusable.....284-285
 Rubber Liquid Cream Glue..... 114

B

Back Room Shelving
 See Utility Shelving 9999

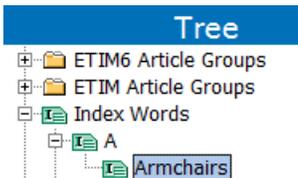
Bags
 See also Canvas Tote Bags 9999
 Book..... 148, 1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057
 Browsing Tote.....148, 151, 1056-1057
 Custom Imprinted.....149
 Hanging185-189
 Interlibrary Loan.....148-150
 Library & Reading Promotion148, 1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057
 Mailing148-149
 Mesh Media 188
 Multimedia173, 185-189
 Plastic..... 1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057
 Zipper-lock..... 173

Band Daters144-145

Banners
 Custom590-591
 Flag420
 Library & Reading Promotion ..1022-1025, 1050, 1054-1055

Index Words

Index words are created in the workbench Tree under the **Index Words** node and can be linked to as many products as needed. For more information about creating Index words and linking them to products in STEP, see the **Creating an Index Words Structure** topic.



Tables of Contents

As opposed to indexes, which are located at the back of publications, tables of contents are found at the beginnings of publications or publication sections. It is typically recommended to use the standard table of contents functionality in InDesign to create traditional tables of contents.

However, STEP'n'design can be used to create 'section indexes' from STEP, which are a type of table of contents. Since the creation of a section index follows a different process than the creation of a document index, it is not covered in this section. For information on how to create a product template designed to create a 'section index' table of contents, see the **Creating a Table of Contents Product Template** topic.

Creating an Index Words Structure

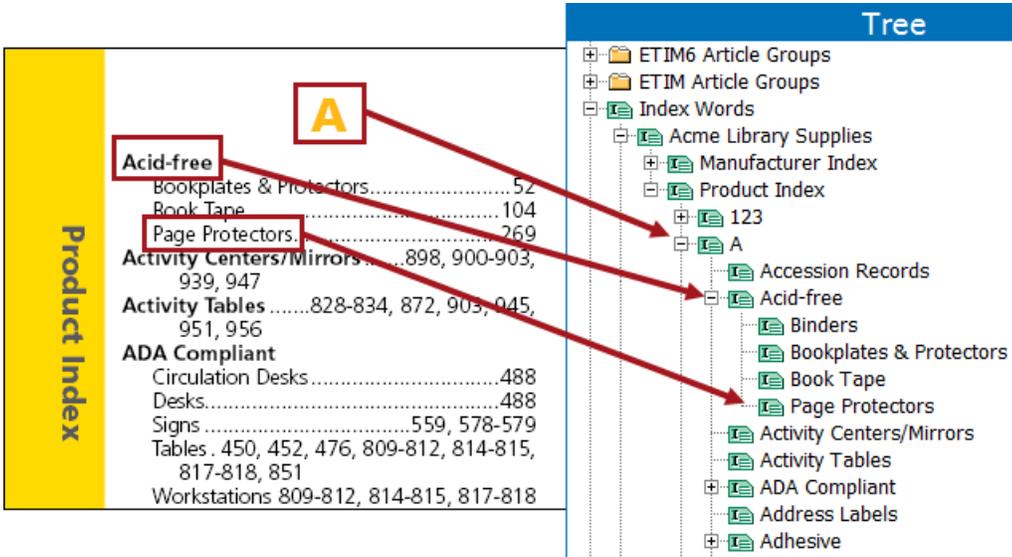
In order to generate and extract an alphabetical index from a publication in STEP, a hierarchy of **Index Words** must first be created. These words must then be linked to the products that should appear in the index. Index words are created in the Tree under the Index Words root node and can be linked to as many products as needed. For example, you may need to link a product family containing chair products to two different index words—'Chairs' and 'Furniture.' Child products within the family could further be linked to sub-levels of index words, for example, 'Swivel chairs' or 'Recliners.'

The index word hierarchy functions similarly to a classification hierarchy in STEP. Products are linked to index words from the product **References** tab, similar to how products are linked to classification folders. Index word links are also inherited from parent to child objects.

The following screenshot shows a partial sample of an index exported from a publication in STEP:

Product Index	A	B
	<p>Acid-free Bookplates & Protectors..... 52 Book Tape..... 104 Page Protectors.....269 Activity Centers/Mirrors898, 900-903, 939, 947 Activity Tables828-834, 872, 903, 945, 951, 956 ADA Compliant Circulation Desks488 Desks.....488 Signs559, 578-579 Tables . 450, 452, 476, 809-812, 814-815, 817-818, 851 Workstations 809-812, 814-815, 817-818 Address Labels .16-17, 19, 55, 57, 146, 242 Adhesive Pockets.....135-139 Removers..... 116, 237 Transfer Guns & Tape..... 112 Adhesives Glue 114-115, 119, 236-238 Mounting... 234, 237-238, 240, 284-285, 551 Acrylic Tape 114 Reusable.....284-285 Rubber Liquid Cream Glue..... 114</p>	<p>Back Room Shelving See Utility Shelving 9999 Bags See also Canvas Tote Bags 9999 Book..... 148, 1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057 Browsing Tote.....148, 151, 1056-1057 Custom Imprinted..... 149 Hanging185-189 Interlibrary Loan.....148-150 Library & Reading Promotion148, 1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057 Mailing148-149 Mesh Media 188 Multimedia173, 185-189 Plastic..... 1022-1024, 1027-1028, 1031-1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057 Zipper-lock..... 173 Band Daters144-145 Banners Custom590-591 Flag420 Library & Reading Promotion ..1022-1025, 1050, 1054-1055</p>

The next screenshot shows a section of the same index, superimposed with a portion of the index words hierarchy that was used to generate the index:

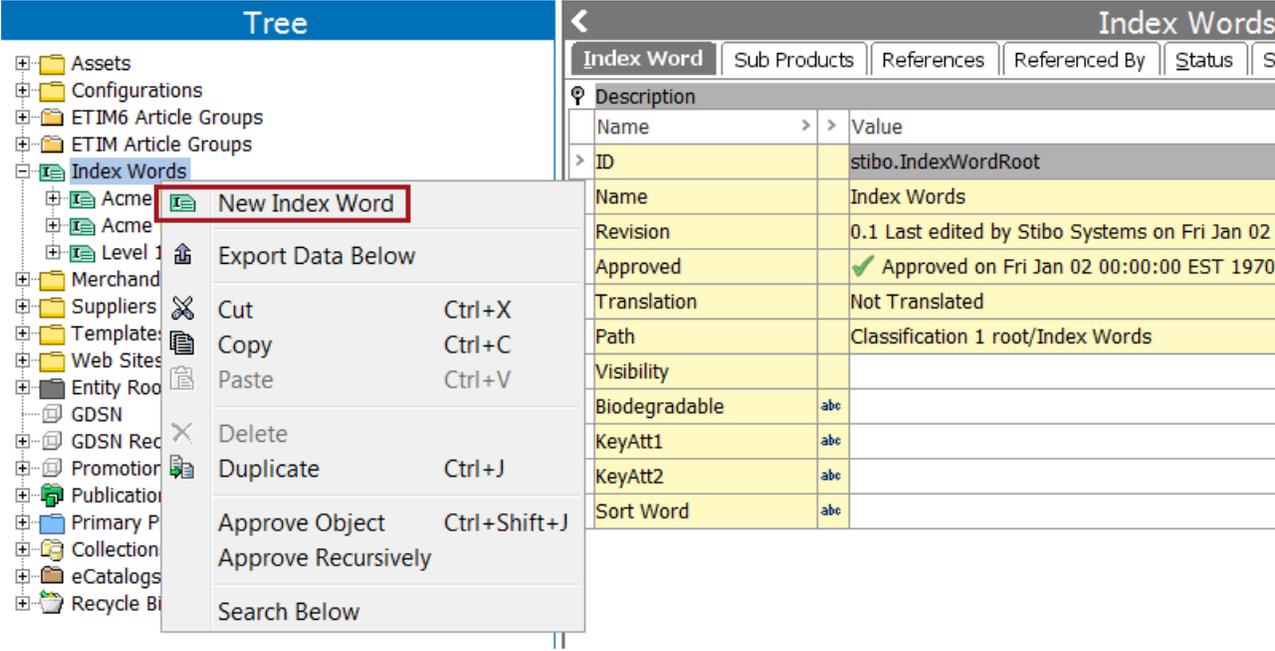


When generating an index, it is possible to use InDesign’s standard features. However, for a typical STEP-produced publication, standard InDesign functionality is not ideal as it typically requires a manual selection of index words on each individual page. An index created in STEP, however, can generate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

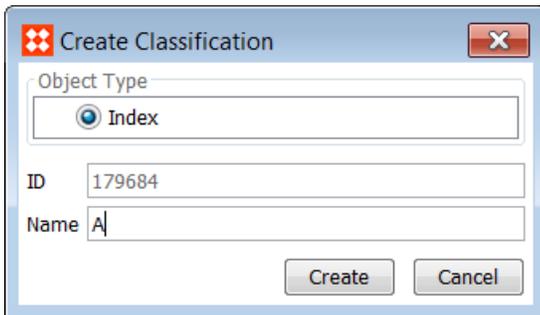
For detailed instructions on how to export an index from a publication in STEP, see the **Creating Document Indexes** section of the **STEP'n'design** documentation.

Creating Index Words

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



- In the **Create Classification** dialog that displays, enter a **Name** for your index word, then click **Create**. (By default, the 'Index' alternate classifications object type [ID = stibo.IndexWord] is configured to autogenerate an ID by using the ID Pattern of [id].)



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



Note: Typically, an index word hierarchy intended for use with a single language will have a 'parent' level of single index letters (for example, A, B, C). For dimension-dependent indexes, however, it is recommended to instead use a transformation on export that extracts the first letter of each word that begins a new letter in the index. For information on this method, see the **Creating Document Indexes** section of the **STEP'n'design** documentation.

Using a Sort Word

In the index word editor, enter a **Sort Word** if, on output, you would like your index word to be placed in a different area of the index than its alphabetical order. For example, if you are creating a supplier index and one of your company names begins with a numeral, such as '1st Acme Corp.', you may want this company to appear in the F section of the index output (listed with other companies whose names begin with the word 'First') instead of appearing before the letter A, where entries that begin with numbers would be placed in a standard alphabetical sort order.

The screenshot shows the Stibo Systems interface. On the left is a 'Tree' view with a hierarchy: Assets, Configurations, ETIM6 Article Groups, ETIM Article Groups, Index Words, Acme Educational Supplies, Acme Library Supplies, Manufacturer Index, 123, and 1st Acme Corp. (highlighted). Below 1st Acme Corp. are items A through H. On the right is a detailed view for '1st Acme Corp. rev.0.1 - Index Word'. It has tabs for Index Word, Sub Products, References, Referenced By, Status, State Log, and Tasks. The 'Index Word' tab is active, showing a 'Description' table with the following data:

Name	Value
ID	179695
Name	1st Acme Corp.
Revision	0.1 Last edited by USER7 on Thu May 19 17:36:05 EDT 2016
Approved	✘ Never Been Approved
Translation	Not Translated
Path	Classification 1 root/Index Words/Acme Library Supplies/Manufacturer
Visibility	
Biodegradable	abc
KeyAtt1	abc
KeyAtt2	abc
Sort Word	abc First

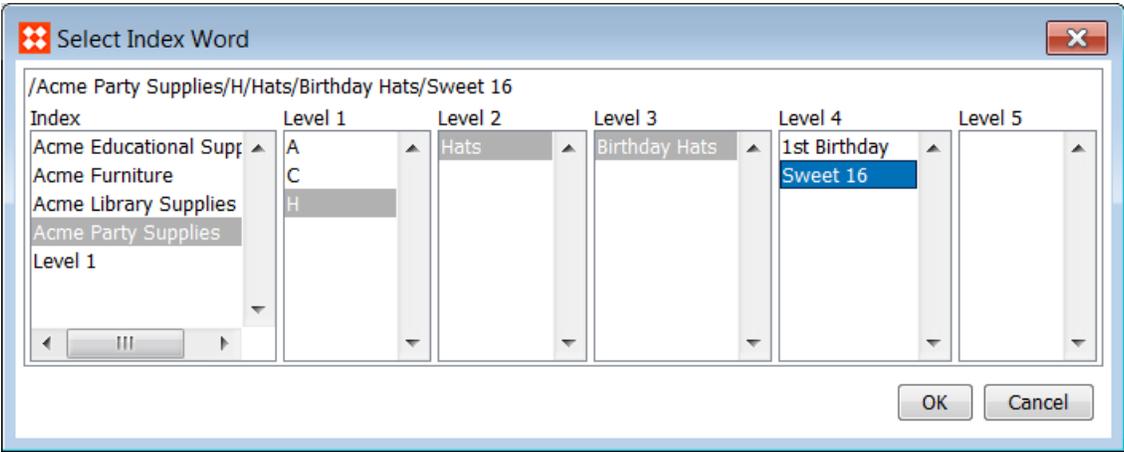
Linking Products to Index Words from the Product Hierarchy

Once your index words hierarchy is created, you may now link these words to products.

1. In the Tree, navigate to the product to which you would like to link your index word(s).
2. On the **References** tab, expand the flipper for Index Words and click **Add Index Word**.

The screenshot shows the 'References' tab for 'Sweet 16 Hat rev.0.2'. It has tabs for Commercial, Tables, Category Profile, Proof View, Status, State Log, and Tasks. The 'References' tab is active, showing sub-tabs for Product, Sub Products, References, Referenced By, and Images & Documents. The 'References' sub-tab is active, showing a list of reference types: Document References, Image References, Item References, Classification, Item References, Product, Packaging Hierarchy References, Index Words, and Publications. The 'Index Words' section is expanded, showing 'Inherited From' and 'Index' with expandable arrows. The 'Add Index Word' link is highlighted with a red box.

3. Select the relevant index, then click through the additional levels until you have applied the desired index words. Click **OK**.



4. The product is now linked to the index word.

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

5. Repeat the above steps to link your product to additional index words. A single product can be linked to multiple index words, depending on all of the index locations where the product should appear.

Note on Index Word Pathnames

If the system setting **Use full pathname for classes on Product References Tab** is set to **Y**, the lowest level of each linked index word will appear as a path instead of an individual word. However, this will not impact the output of the index words in the 'Alphabetical Index - XML' file; linked index words will correctly appear as words, not paths.

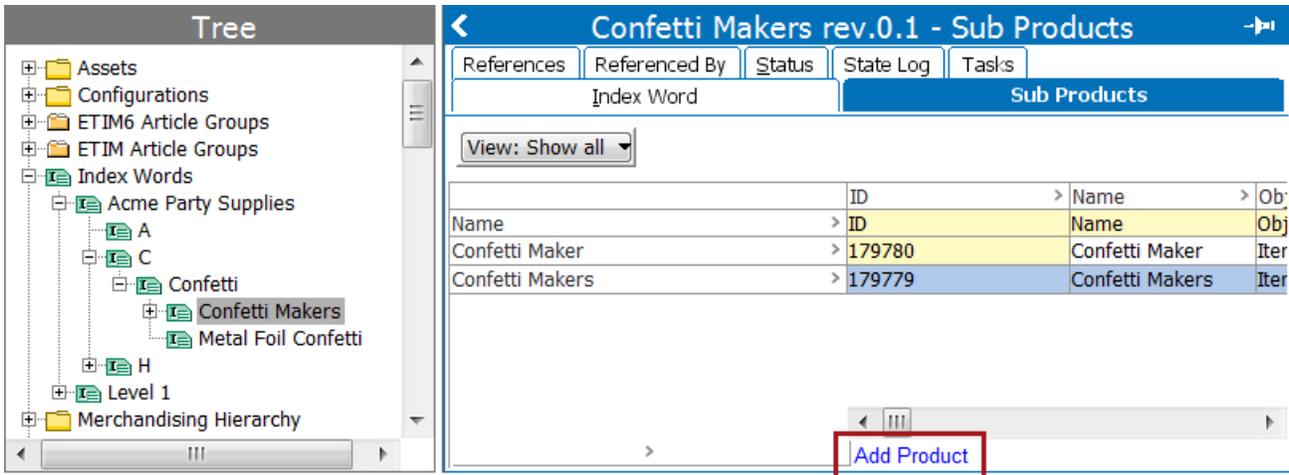
Index Words						
Inherited From	Index	Level 1	Level 2	Level 3	Level 4	
>	Locally defined	Acme Party Supplies	H	Hats	Birthday Hats	Index Words/Acme Party Supplies/H/Hats/Birthday Hats/Sweet 16
Add Index Word						

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

Viewing and Linking Products from the Index Words Hierarchy

All products linked to a particular index word can be viewed from the **Sub Products** tab of the index word object. Additionally, products can be added to index words from this tab.

1. In the Tree, navigate to the index word to which you would like to link your product(s).
2. On the **Sub Products** tab, click 'Add Product.'



3. In the **Select Classification Product Link** dialog that displays, browse or search for the product(s) that you would like to link to the index word. Multiple products may be selected by holding Shift or Ctrl when making selections.
4. Click **Select** to close the Select Classification Product Link dialog. The products are now linked to the index word.

Inheritance of Index Words

Index words are inherited in a similar fashion to how standard product-to-classification references are inherited. By default, index words are inherited in an **Accumulative** fashion. This means that an index word that is linked to a parent product will be inherited by all of its child products, and additional index words can be linked to the children *in addition to* the inherited word(s). However, inherited words cannot be overwritten or removed from lower levels.

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

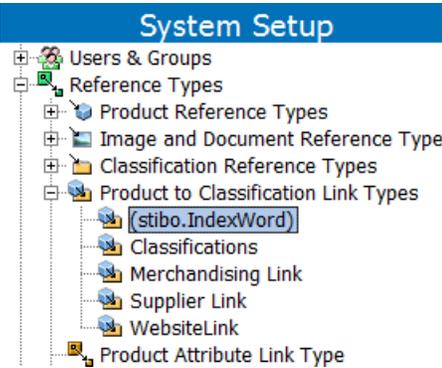
Inherited From	Index	Level 1	Level 2	Level 3	Level 4
> Paper Hats	Acme Party Supplies	H	Hats		
> Paper Hats	Acme Party Supplies	H	Hats	Birthday Hats	
> Locally defined	Acme Party Supplies	H	Hats	Birthday Hats	Sweet 16

> [Add Index Word](#)

For more information on reference link inheritance, see the **Reference and Link Types** section of the **System Setup / STEP Super User Guide** documentation.

Note on the Index Word Product to Classification Link Type

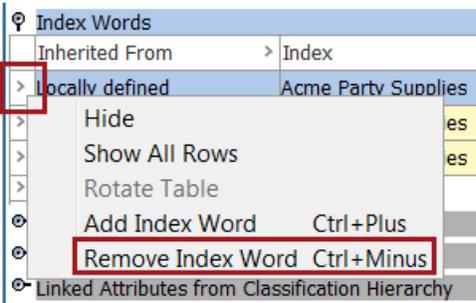
The Index Word product-to-classification link type (ID = stibo.IndexWord) is a hidden object in STEP. It can only be accessed by searching for its ID in the **Goto** field or on the **Search** tab. Typically, no configuration changes should be made to this object. However, an occasional configuration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



Unlinking Products from Index Words

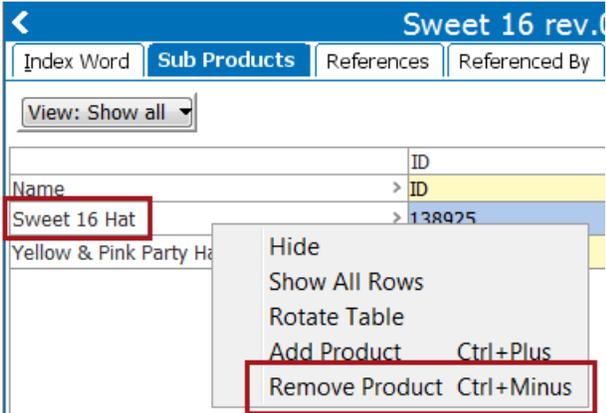
Unlinking From the Product Hierarchy

1. Navigate to the relevant product in the Tree, then expand the **Index Words** flipper on the product **References** tab.
2. Right-click the arrow to the left of the word that you would like to remove, then select **Remove Index Word** from the menu. (Note that only words designated as 'Locally defined' can be removed. Inherited words can only be removed from the parent level to which they are linked.)



Unlinking From the Index Word Hierarchy

1. Navigate to the relevant index word in the Tree, then click the **Sub Products** tab.
2. Right-click the name of the product that you would like to unlink, then select **Remove Product**.



Exporting Index Data from STEP

After all InDesign documents for a publication have been finalized and saved back to STEP, data about the mounted products and the pages on which they appear can be exported from the publication in order to generate an **Alphabetical Index - XML** file. This XML file format is used to create both types of indexes—the basic 'stock number' index and the more advanced 'alphabetical index.'

If building an alphabetical index, **index words** are required. This topic assumes that you have already created your index words and index words hierarchy and linked them to the products in your publication. See the **Creating an Index Words Structure** topic for more information.

This topic describes how to export an Alphabetical Index - XML file from a publication in STEP using standard STEP Export Manager functionality. By using the Export Manager, you can define, through mapping, which index words and/or STEP attribute(s) to include in the index output; how to sort the exported data (for example, what country, language, or numerical order should be used to sort); and what separator characters should be placed between multiple page numbers and/or page ranges (such as 1, 2 or 1-3).

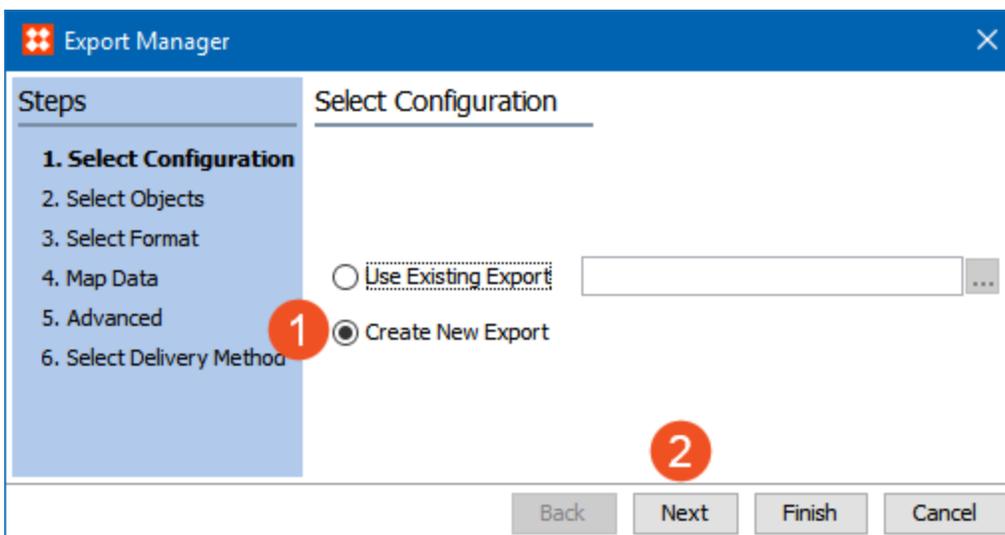
The exported index will organize the index entries into XML tag structures, such as:

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

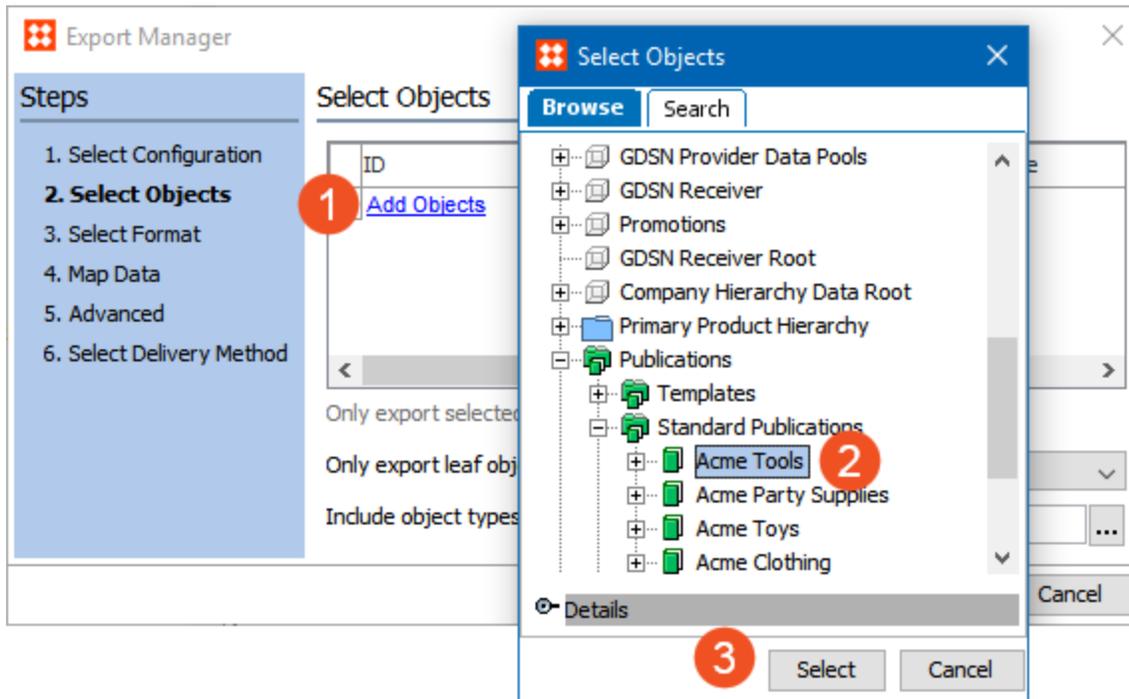
Note: This topic assumes a basic familiarity with the STEP Export Manager. For full details on Export Manager functionality, see the **Export Manager** section of the **Data Exchange** documentation.

Exporting an Index Using the STEP Export Manager

1. In the workbench, navigate to File > Export > Data to launch the Export Manager. Select **Create New Export**, then click **Next**. Alternatively, you may right-click on the publication from which you want to export the index and click **Export Data Below**.

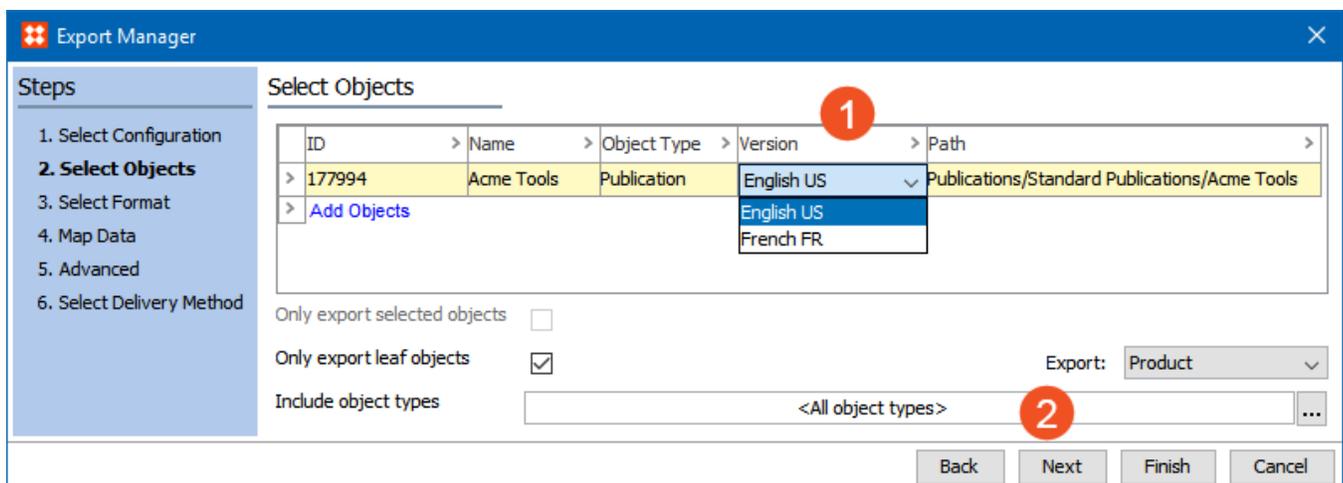


- In step 2 (Select Objects), define the publication from which you would like to export the index. Click **Add Objects**, search for or browse to the relevant publication in the **Select Objects** dialog, then click **Select**.



- To define the publication **version** from which you want to export your index, select the relevant version from the dropdown list in the **Version** column, then click **Next**.

Note: 'Product' should be selected from the **Export:** dropdown, not 'Publication Objects'. Also, it does not matter if 'Only export leaf objects' is checked. Since the export will be in XML format, this option is ignored.



- In step 3 (Select Format), choose **Alphabetical Index - XML** from the dropdown list.

The screenshot shows the 'Export Manager' window with the 'Select Format' dialog open. The 'Steps' pane on the left indicates that step 3, 'Select Format', is the current step. The 'Select Format' dialog has a dropdown menu with 'Alphabetical Index - XML' selected. Below the dropdown, there is a description: 'Provides a format for export of alphabetical index in XML format'. The dialog contains several input fields: 'Sort Language Code' with 'en', 'Sort Country Code' with 'US', 'Page Number Separator' with ',', 'Page Range Separator' with '-', and 'Use Numerical Sort' with 'yes'. At the bottom of the dialog are four buttons: 'Back', 'Next', 'Finish', and 'Cancel'.

5. Configure the remaining options in step 3 as follows:

- **Sort Language Code:** This is a free-text field. Enter the two-letter lowercase ISO 639-1 language code on which you would like to sort the index words. The default selection is **en**. A full list of codes can be found on the web.
- **Sort Country Code:** This is a free-text field. Enter the two-letter uppercase ISO-3166 country code on which you would like to sort the index words. The default selection is **US**. A full list of codes can be found on the web.
- **Page Number Separator:** This defines what character should be placed between page numbers if a product appears on more than one page in the publication. This is typically a comma with a space added after.
- **Page Range Separator:** This defines what character should be placed between page numbers if a product appears on more than one consecutive page. This is typically a hyphen with no space on either side.
- **Use Numerical Sort:** Select **yes** to sort numerical entries in ascending numerical order:
 - 100
 - 200
 - 1002345
 - 1003456
 - 2001234

Select **no** to sort numerical entries on the first number, as follows:

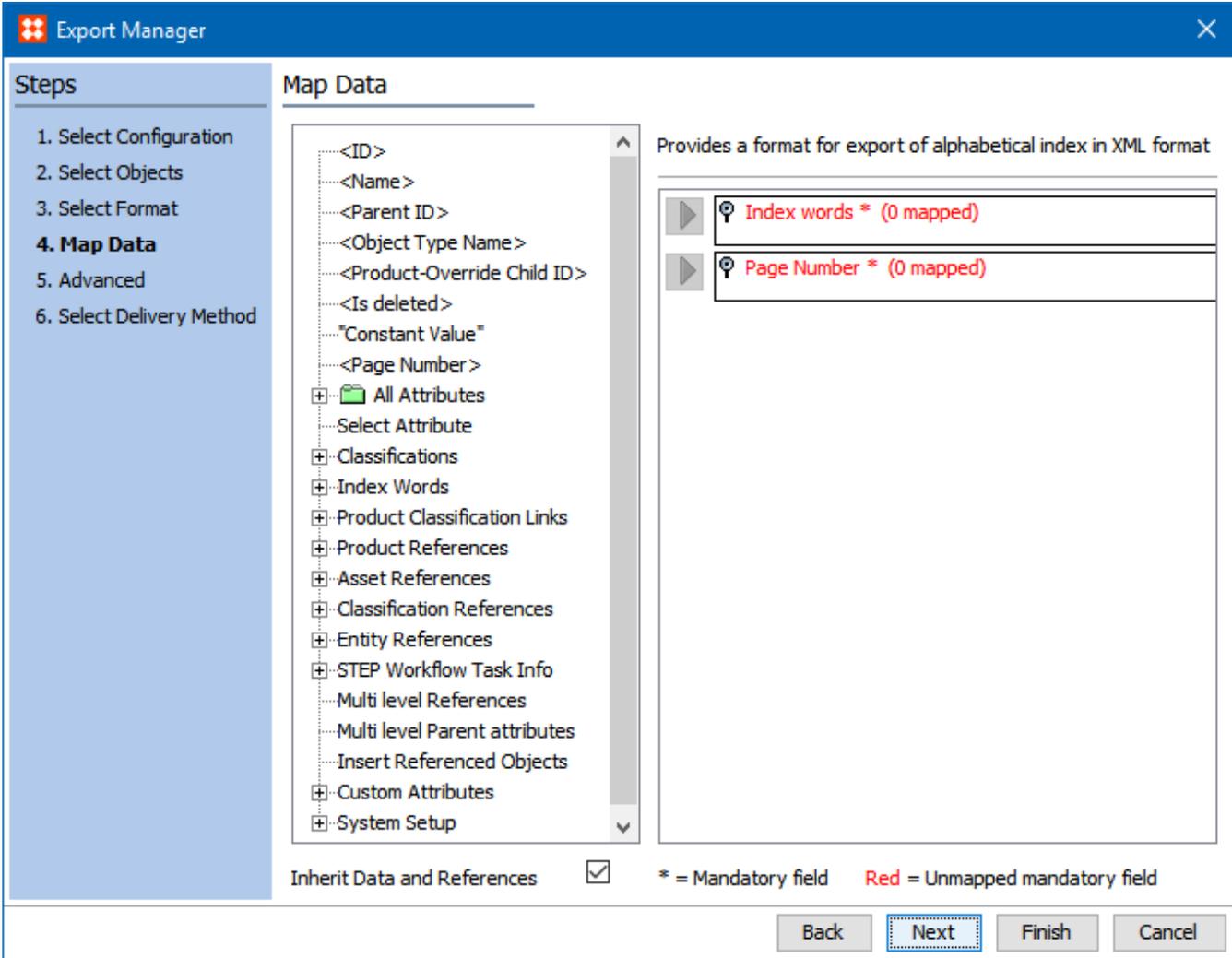
- 100
- 1002345
- 1003456
- 200
- 2001234

6. Click **Next** to move to step 4, **Map Data**.

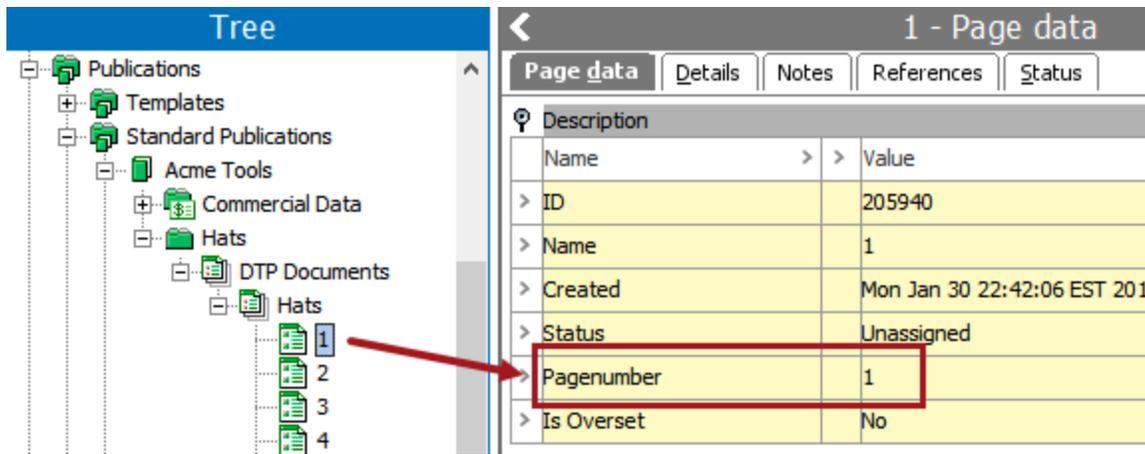
Mapping Index Data

The next step in configuring the index export is to map the data, which occurs in step 4 of the Export Manager, **Map Data**.

All indexes must contain at least two elements—an **index word** and a **page number**.



Page number is not mapped as an attribute, since page numbers are automatically populated from InDesign pages after they are saved to STEP.

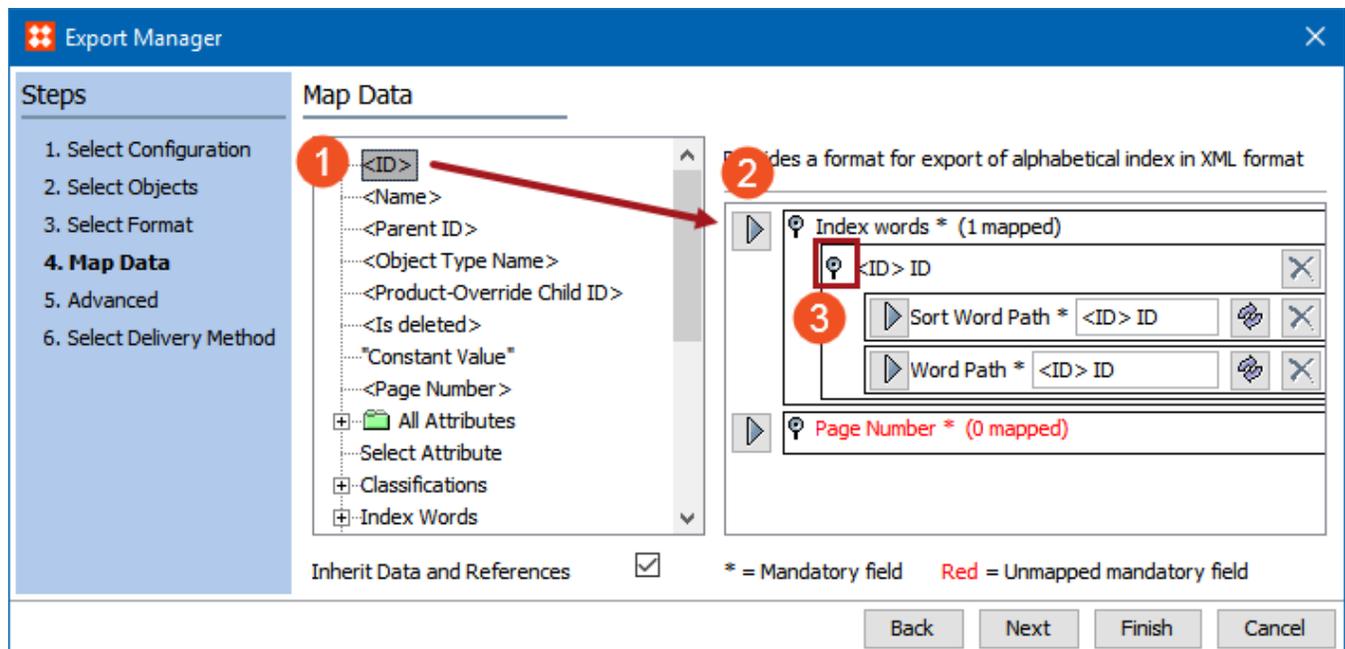


Mapping a Basic Stock Number Index

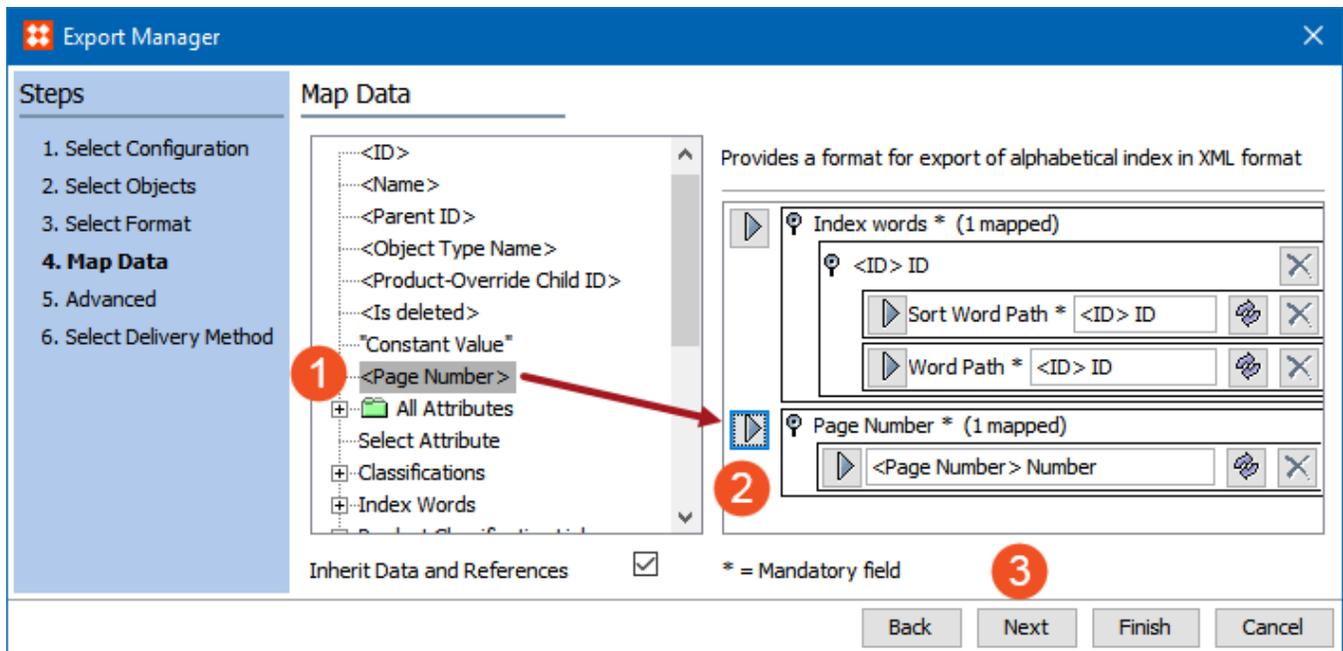
The **index word** in a basic stock number index is typically a part number or a catalog number. This can either be an attribute, a STEP ID, or a STEP name. For this example, the **STEP ID** will be used as the index word.

1. On the **Map Data** screen of the Export Manager (step 4), select **<ID>**, then click on the arrow directly to the left of the **Index words** flipper.
2. Expand the **<ID>** flipper to display the **Sort Word Path** and **Word Path**. Leave these as-is.

Sort Word Path denotes the content that the Index is sorted by—in this case, the ID of the products. **Word Path** is the content that is actually being pulled into the index—in this case, also the ID of the products.



3. Select **<Page Number>**, then click on the arrow directly to the left of the **Page Number** flipper. Click **Next**.



4. To complete the export of the stock number index, see the last section in this topic, 'Completing the Index Export'.

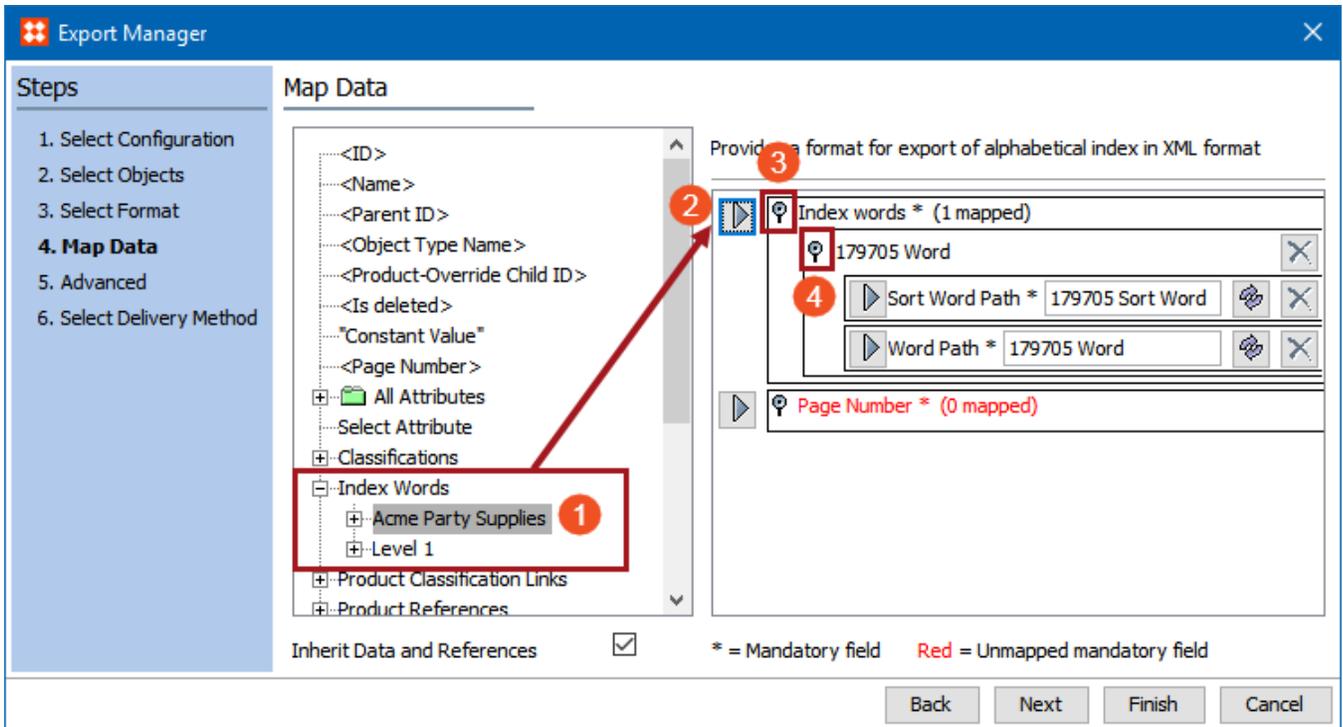
Mapping an Alphabetical Index

Mapping an alphabetical index is more in-depth than mapping a basic stock number index, as more considerations are made for index words and translated content.

The **index words** in an alphabetical index are pulled from the index words that are linked to the products mounted to the InDesign pages.

1. On the **Map Data** screen of the Export Manager (step 4), expand the **Index Words** hierarchy and select the relevant index hierarchy.
2. Click the arrow directly to the left of the **Index words** flipper.
3. Expand the **Index words** flipper
4. Expand the **Word** flipper to display the **Sort Word Path** and **Word Path**. The number in front of Word is the STEP ID of the selected index word hierarchy.

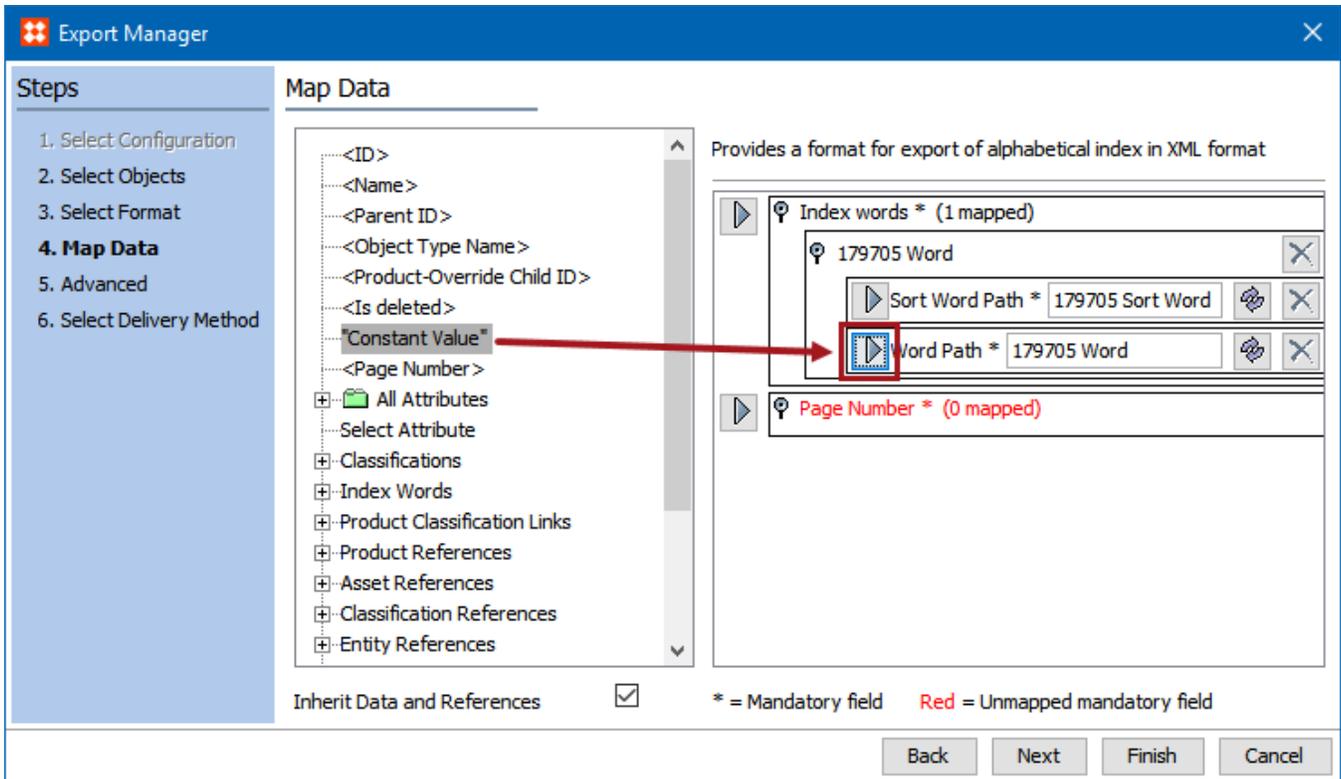
Sort Word Path denotes the content that the Index is sorted by—in this case, the **sort word** attached to the index words. **Word Path** is the content that is actually being pulled into the index—in this case, the actual index words in the hierarchy. See the **Creating an Index Words Structure** topic for more information on sort words.



5. If your index will contain translated content, it is recommended to map a **constant value** in order to generate top-level **index letters**—1, 2, 3, A, B, C, and so forth. For example, in English, a product named 'Black chair' would be listed under the letter B, but in Germany, the same product would be named 'Schwarz stuhl' and would need to be listed under the letter S. This enables you to use a single dimension-dependent index words hierarchy that is translated instead of having a separate hierarchy for English, a separate hierarchy for German, and so forth.

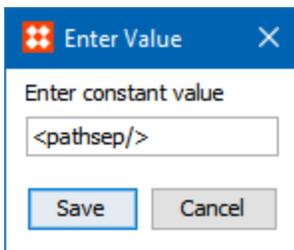
If there is no chance that the contents of your publication will be translated, it is acceptable to *not* map a constant and instead use letters as the **Level 1** index word, as shown throughout the **Creating an Index Words Structure** topic.

6. Select "**Constant Value**" under Map Data, then click the arrow to the left of Word Path.



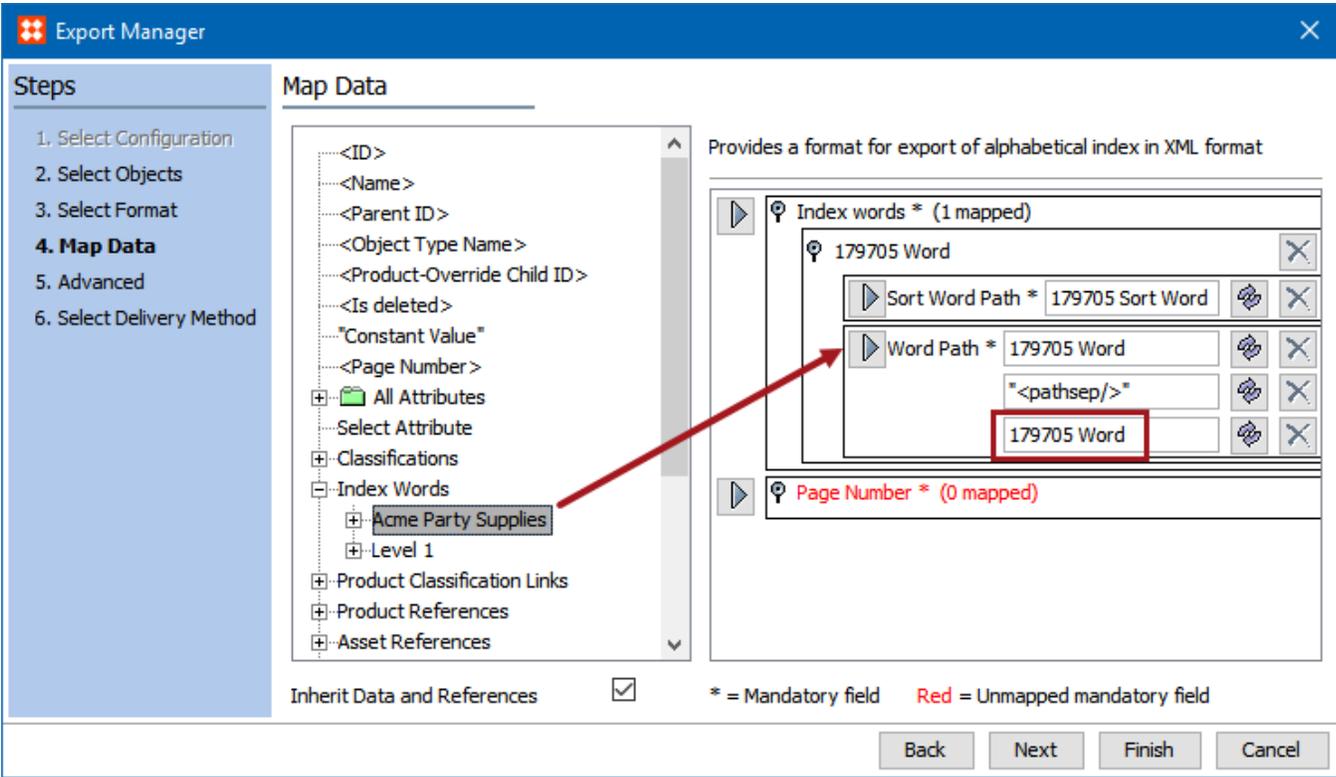
7. On the **Enter Value** dialog that displays, enter the string `<pathsep/>`, then click **Save**.

The constant `<pathsep/>` is used to identify each individual index letter and ensures that the same index letter is only shown once.

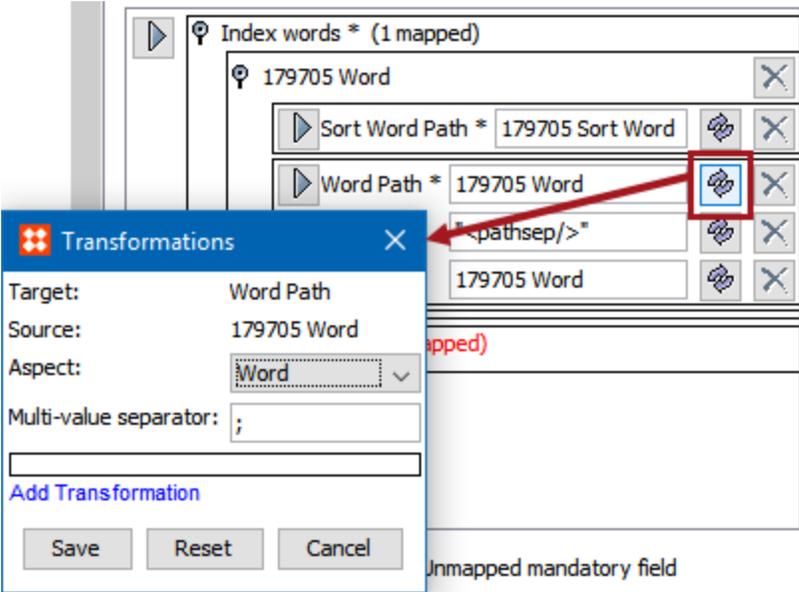


8. Next, the index hierarchy must be mapped to the Word Path again. The first mapped index will be used to extract the index letters from the index words through a transformation (see step 10). The second mapped index will be used to extract the index words themselves.

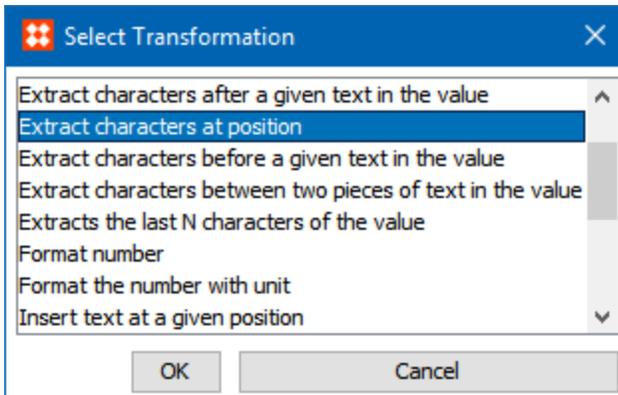
Select the relevant index hierarchy again from beneath Map Data, then click on the arrow to the left of Word Path to map the index hierarchy a second time.



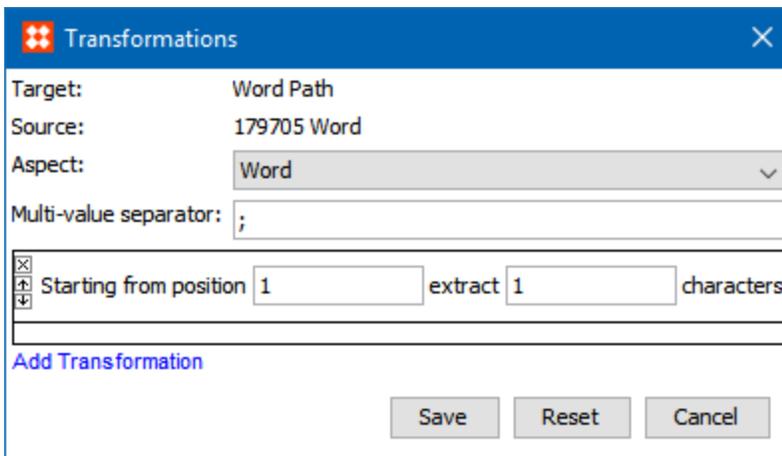
- 10. Next, a **transformation** must be applied to the first mapped Index hierarchy to extract the first letter of each index word. This letter will be used as the index letter when a new letter begins in the index. Click on the transformations icon to the right of the first Word Path field to display the **Transformations** dialog.



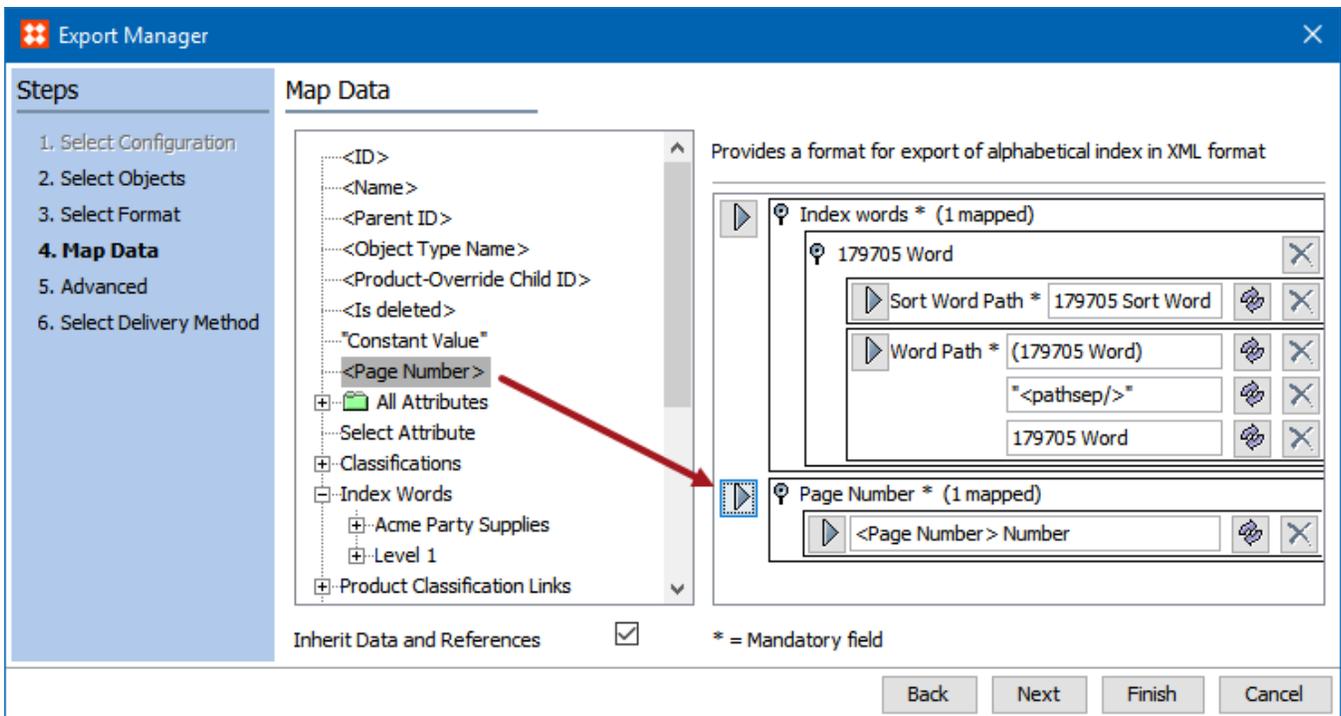
11. Click 'Add Transformation' to display the **Select Transformation** dialog.
12. Select 'Extract characters at position' from the list of transformations, then click **OK** to return to the Transformations dialog.



13. Enter a '1' in both the 'Starting from position' and 'extract' fields, then click **Save**.



14. Last, map the Page Number by clicking **<Page Number>** and clicking the arrow next to Page Number, then click **Next**.



Completing the Index Export

Once you have completed your index mappings, follow these steps to complete the index export from STEP. The following steps describe basic Export Manager functionality and are not unique to the Alphabetical Index - XML format.

1. After clicking **Next** on the **Map Data** screen of the Export Manager (step 4), you are taken to the **Advanced** screen (step 5). All options may be left as-is. Click **Next**.
2. On the **Select Delivery Method** screen (step 6), choose **File** from the dropdown, then click **Finish**.
3. On the **Save Export Configuration** dialog, select 'Save Options' to save the Index Export configuration, which is recommended. Click the ellipsis button (...) by the **Save to** window and choose a classification folder in which to store your export configuration. A typical location is Configurations > Export Configurations.

Note: For more information on saving export configurations, see the **Running a Data Export** section of the **Export Manager** documentation.

1. Click **OK** to begin the Export Process, then click **Go to Process** to go to the BGProcesses tab and retrieve the file once the export is completed. The file is exported as XML.
2. Save the XML file to a location of your choosing on your hard drive.

Once these steps are completed, the XML file is ready to be formatted and imported into InDesign. For instructions on next steps, see the **Formatting and Mounting an Index in InDesign** topic.

Formatting and Mounting an Index in InDesign

Once the Index XML has been exported from STEP, the next steps are as follows:

1. Format the XML file
2. Create the index mounting page
3. Configure the paragraph and character styles within the mounting page
4. Import the XML file into InDesign
5. Mount the index onto the page
6. Apply final formatting to the index

Formatting the Index XML File

The typical desired end result for a mounted index is to have what is known as **dot leaders** to separate the index words from their corresponding page numbers. For example:

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

Dot leaders are not placed into the XML file itself. Instead, a special character—typically a # symbol—is added to the XML file, and this symbol will later be replaced in InDesign with a tab character that will generate the dot leaders. This process is explained later in this topic in the 'Replacing Special Characters With Dot Leaders on the InDesign Page' subsection.

To add the special character to the index XML:

1. Open the XML file in the XML editor of your choice, such as UltraEdit or Notepad++.
2. In the XML file, find all instances of the string **</Word><PageNumber>** and replace them with **</Word>#<PageNumber>**.

```
<?xml version="1.0" encoding="UTF-8"?>
<AlphaIndex>
  <Level1><Word>A</Word></Level1>
  <Level2><Word>AccurateCut Die Cutting Machines & Dies</Word>
  <Level2><Word>Acid-free</Word></Level2>
  <Level3><Word>Bookplates & Protectors</Word><PageNumber>82</
  <Level3><Word>Book Tape</Word><PageNumber>104</PageNumber></Leve
  <Level3><Word>Page Protectors</Word><PageNumber>269</PageNumber>
  <Level2><Word>Activity Centers/Mirrors</Word><PageNumber>898, 90
  <Level2><Word>Activity Tables</Word><PageNumber>828-834, 872, 90
  <Level2><Word>ADA Compliant</Word></Level2>
```

```

<?xml version="1.0" encoding="UTF-8"?>
<AlphaIndex>
<Level1><Word>A</Word></Level1>
<Level2><Word>AccurateCut Die Cutting Machines & Dies</Word>#
<Level2><Word>Acid-free</Word></Level2>
<Level3><Word>Bookplates & Protectors</Word>#<PageNumber>52</PageNumber>
<Level3><Word>Book Tape</Word>#<PageNumber>104</PageNumber></Level3>
<Level3><Word>Page Protectors</Word>#<PageNumber>269</PageNumber></Level3>
<Level2><Word>Activity Centers/Mirrors</Word>#<PageNumber>898, 901</PageNumber>
<Level2><Word>Activity Tables</Word>#<PageNumber>828-834, 872, 901</PageNumber>
<Level2><Word>ADA Compliant</Word></Level2>

```

3. Save the file.

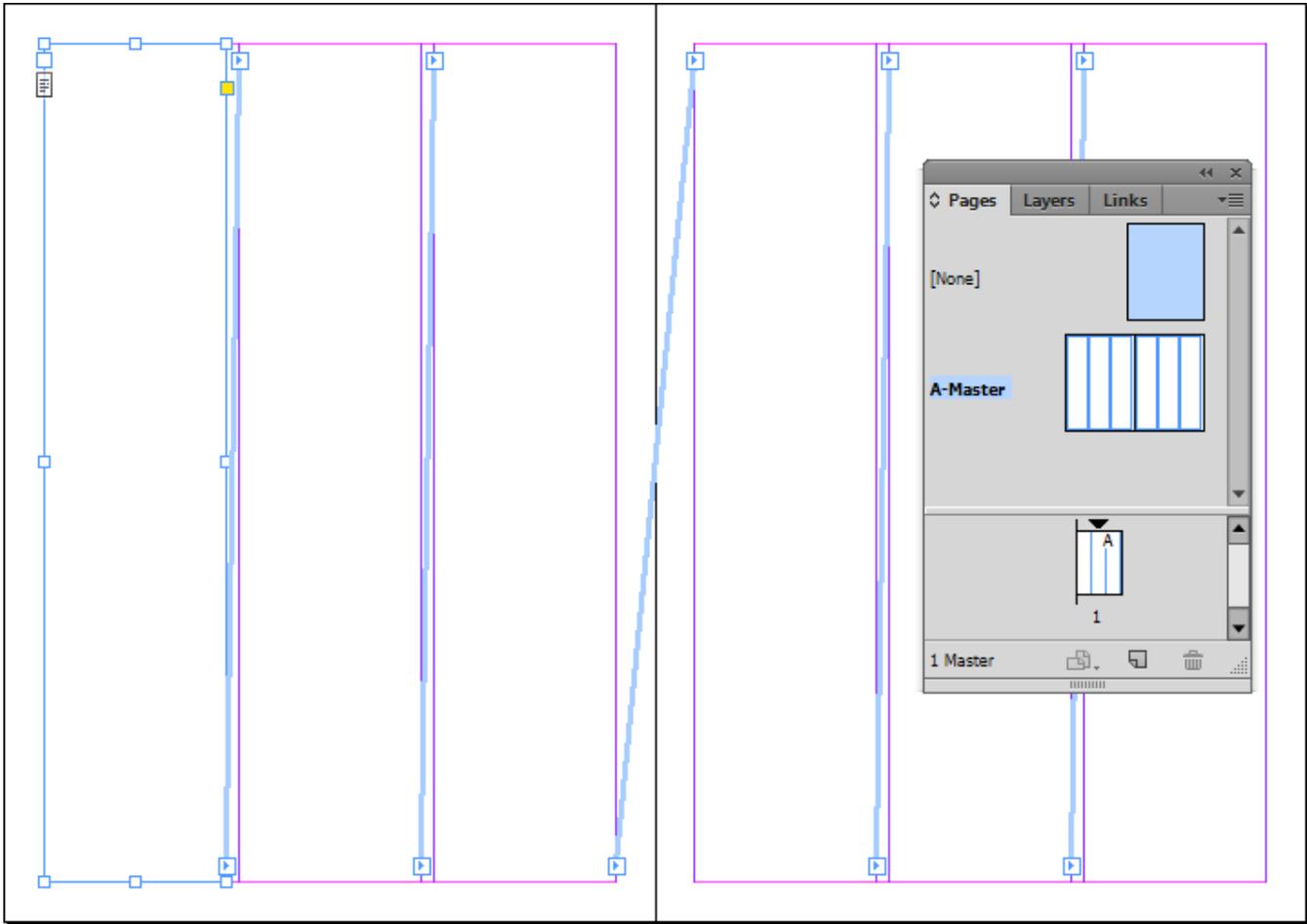
Configuring the Index Mounting Page

The best practice for index mounting pages is to create an InDesign document that contains columns with threaded text frames on the master pages.

Note: A mounting page for an index is *not* a publication template.

The following screenshot shows an index mounting page with three text columns threaded to one another on the master page. Placing text frames on the master eliminates the need to draw a text frame on the page when mounting an index, as the frames will be automatically created. This setup is ideal for lengthy indexes, as new text frames and pages are automatically created as the index mounts.

Since this type of document is created using standard InDesign functionality, instructions on how to create the document itself are outside the scope of STEP documentation. Refer to Adobe InDesign's help documentation for more information. However, the information is presented here to illustrate the recommended document setup for mounting indexes generated from STEP.



Configuring InDesign Paragraph and Character Styles for Indexes

The index mounting page must also have InDesign paragraph styles and character styles configured to properly format the different levels of the index.

Note: This topic does not explain how to create InDesign paragraph styles and character styles themselves; see the **Publication Template Layout, Formatting, and Styles** topic for more information.

As illustrated in the **Creating an Index Words Structure** topic, there are multiple levels to index words—Level 1, Level 2, and so forth.

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

In the index XML, these levels have corresponding **tags**. Level1 corresponds to the <Level1> tag, PageNumber corresponds to the <PageNumber> tag, and so forth.

```

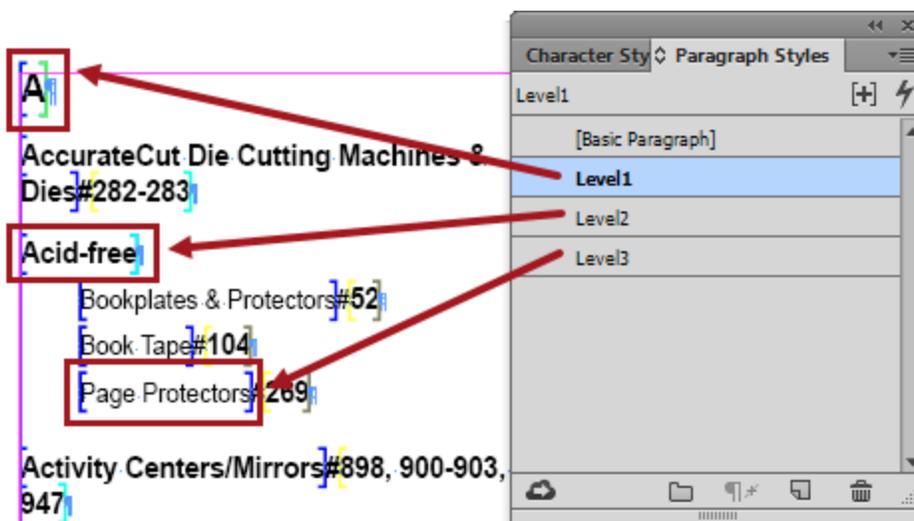
<?xml version="1.0" encoding="UTF-8"?>
<AlphaIndex>
  <Level1><Word>A</Word></Level1>
  <Level2><Word>AccurateCut Die Cutting Machines & Dies</Word>#<PageNumber>282-283</PageNumber>
  <Level2><Word>Acid-free</Word></Level2>
  <Level3><Word>Bookplates & Protectors</Word>#<PageNumber>52</PageNumber></Level3>
  <Level3><Word>Book Tape</Word>#<PageNumber>104</PageNumber></Level3>
  <Level3><Word>Page Protectors</Word>#<PageNumber>269</PageNumber></Level3>
  <Level2><Word>Activity Centers/Mirrors</Word>#<PageNumber>898, 900-903, 939, 947</PageNumber>
  <Level2><Word>Activity Tables</Word>#<PageNumber>828-834, 872, 903, 945, 951, 956</PageNumber>

```

Paragraph Styles for Index Words

Each level of index words needs to have a corresponding paragraph style configured in InDesign, not only for the textual formatting but to place the dot leaders between the words and the page numbers. Best practice is to name the paragraph styles to match the tag names, though any naming can be used as long as the styles are correctly mapped to the tags. See the 'Mapping Styles After Importing the XML' section of this topic below for more information.

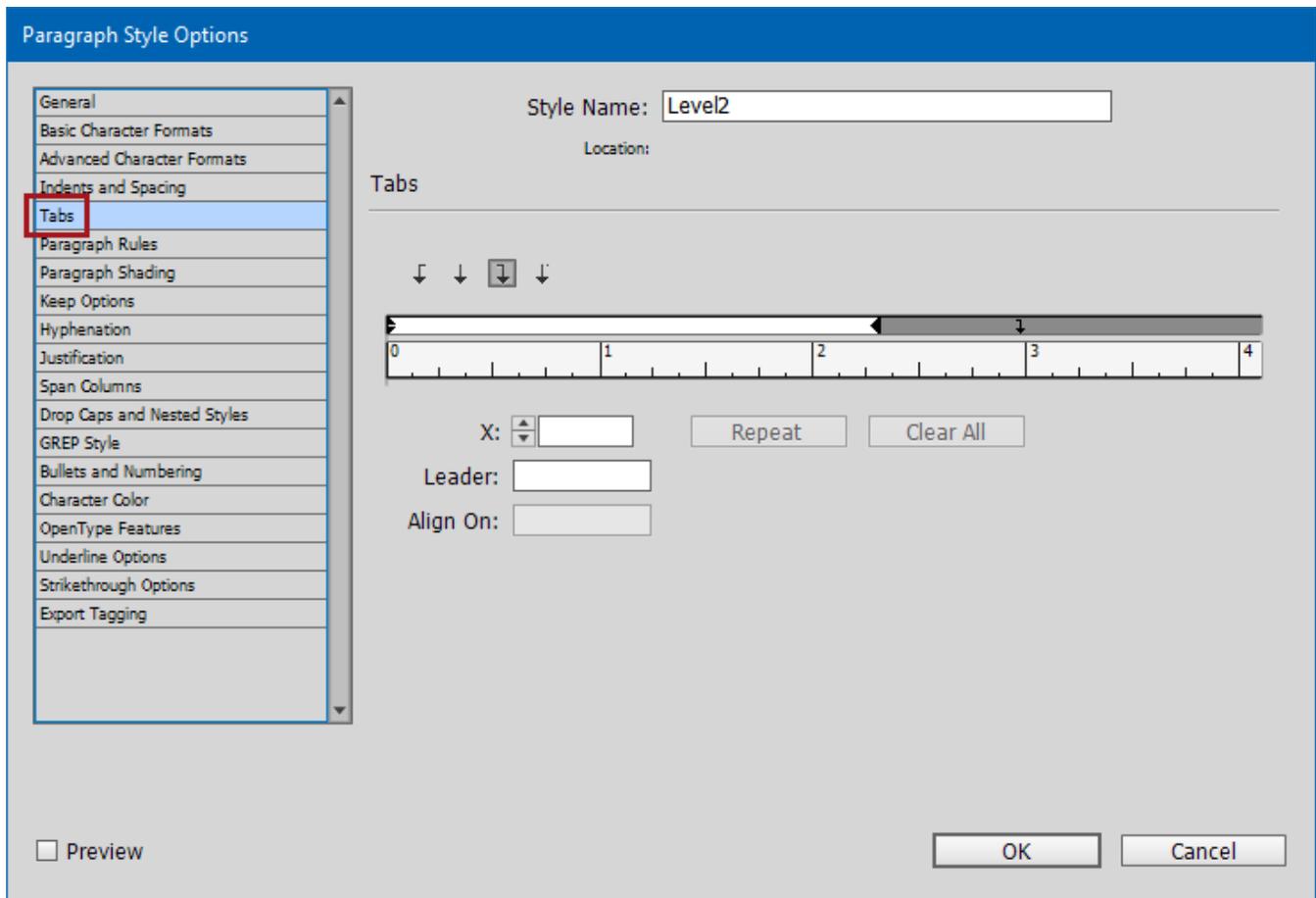
Formatting of the styles is up to the user, but the following screenshots show a common configuration. 'Level1' is a bold 12 pt font; 'Level 2' is a bold 9 pt font; and 'Level 3' is a regular 8 pt font. The font sizes typically get smaller as the index levels go lower.



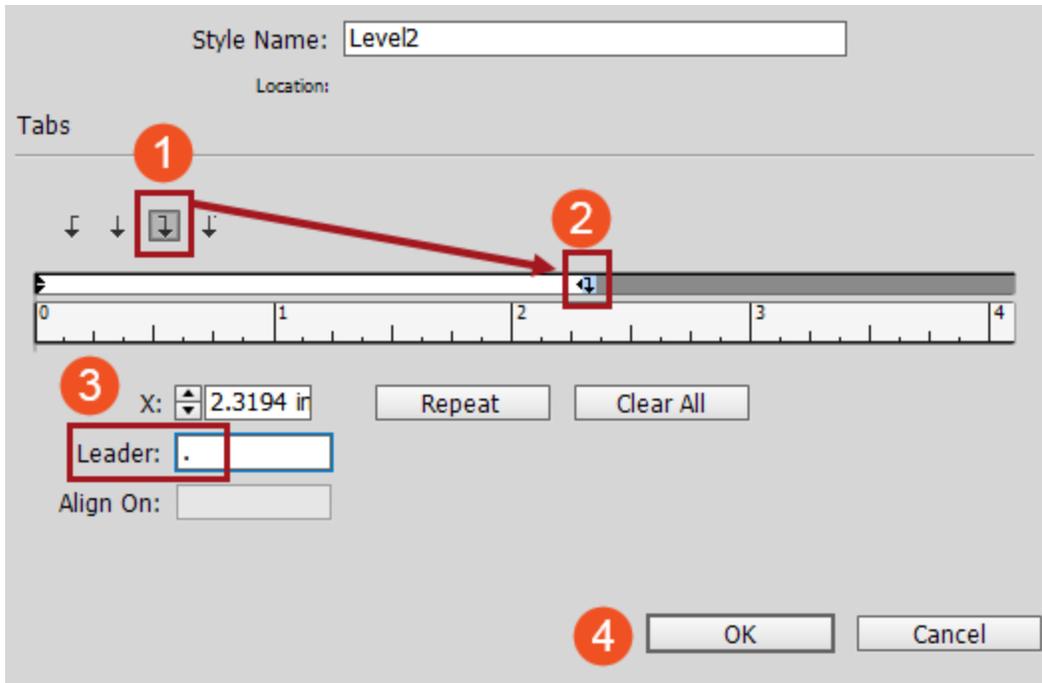
Creating Dot Leaders in Paragraph Styles

To place dots between the index words and page numbers in your index, you will need to configure **dot leaders**. Dot leaders are embedded into the **Tabs** area of InDesign paragraph styles and are configured as follows.

1. Open the InDesign **Paragraph Styles** panel (Window > Styles > Paragraph Styles, or F11), then double-click on the paragraph style that you would like to edit.
2. On the **Paragraph Style Options** dialog, click on **Tabs** in the left column.



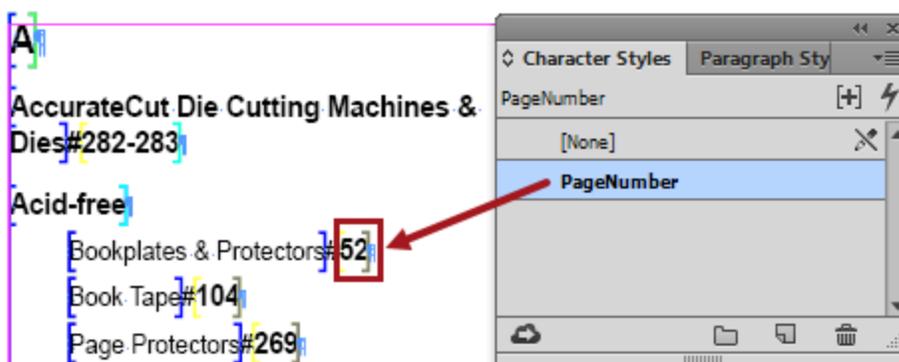
- Under **Tabs** in the right panel, select the right tab icon (1 in the below screenshot), then click the white area above the ruler to place the tab. Drag the tab over until it aligns with the edge of the column (2 in the below screenshot).



4. Enter a period in the **Leader** field (3 in the above screenshot), then click **OK** (4).
5. The dot leader is now configured. Repeat the above steps for all other paragraph styles that should have a dot leader.

Character Styles for Page Numbers

Page numbers are frequently mounted using a character style, as it is common for the page number to be a different style than the index word immediately preceding it. In the below instance, the 'Level3' paragraph style is used to format the index word ('Bookplates & Protectors') and the character style 'PageNumber' is used to override the Level3 paragraph style with a 9 pt bold font for the page number.

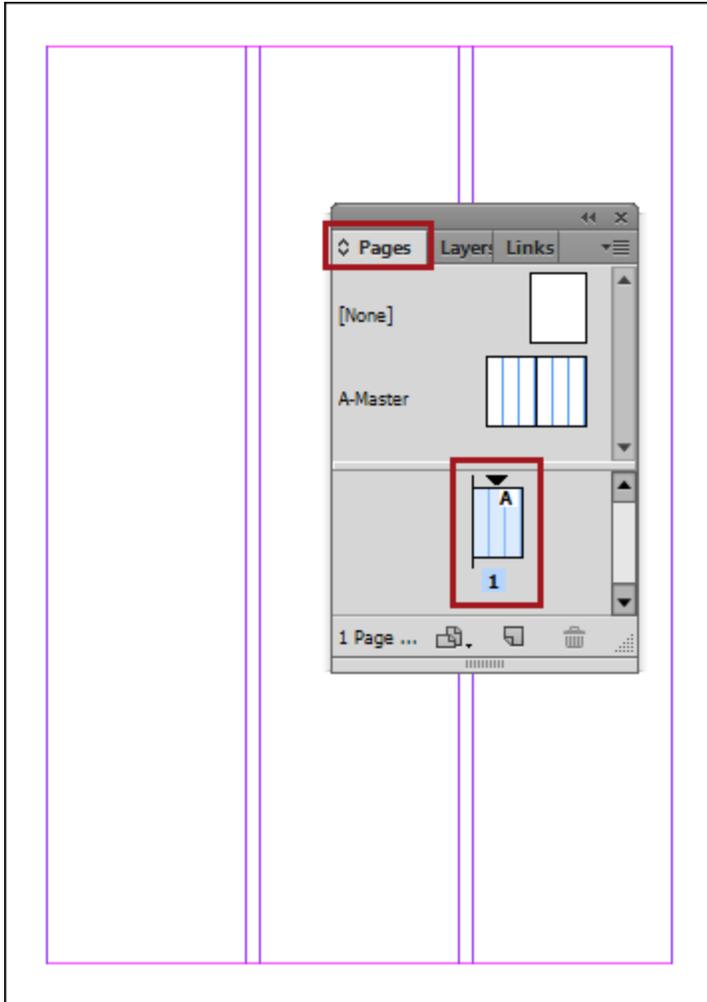


Importing an Index XML File Into InDesign

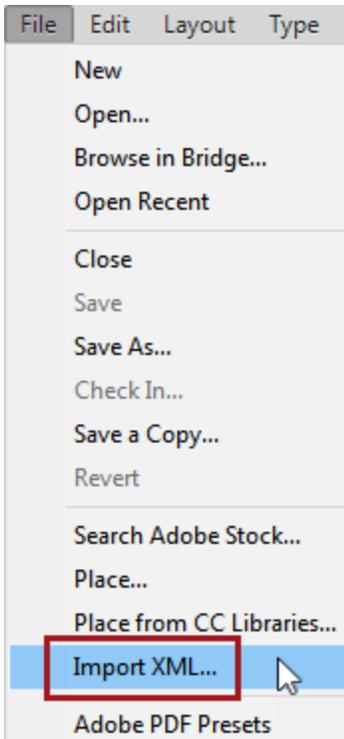
After formatting your index mounting page and the paragraph and character styles, the next step is to import the index XML file into InDesign. With your index mounting page open, follow these steps to import the index XML file.

1. Open the InDesign **Pages** panel (Window > Pages, or F12), then click on the **page** in the lower portion of the panel. Since indexes are not mounted on master pages, the page must be selected.

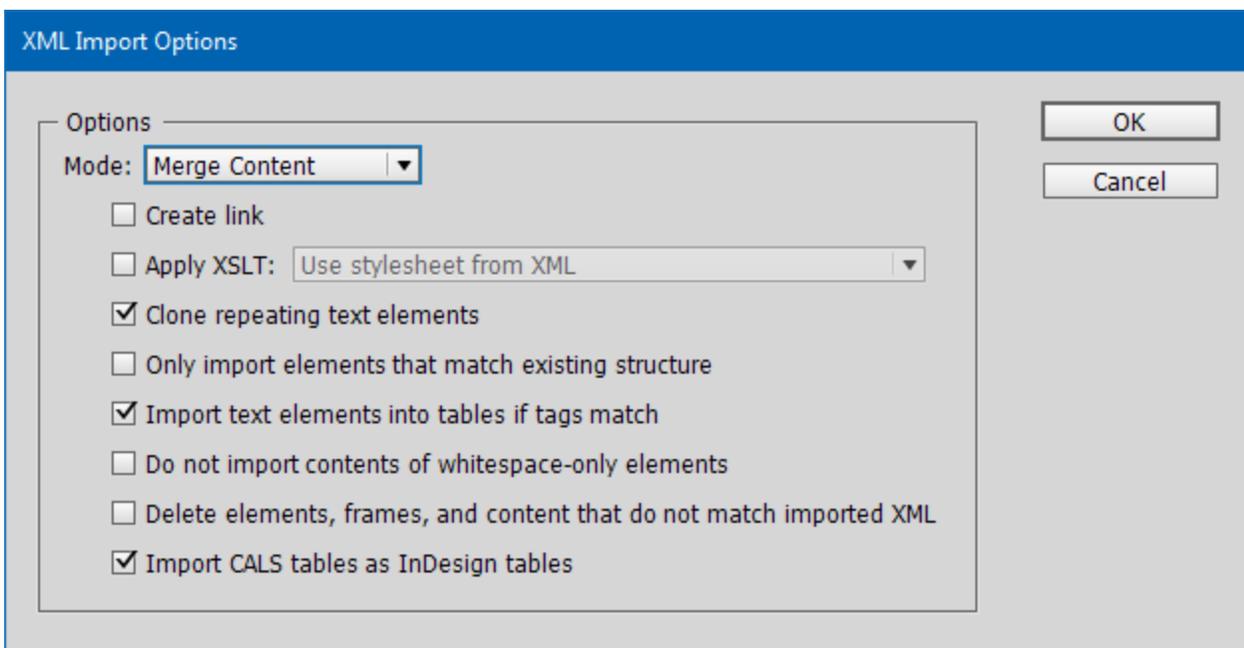
Note: The master page must be applied to the page. In the below example, the A-Master master page has been applied to page 1.



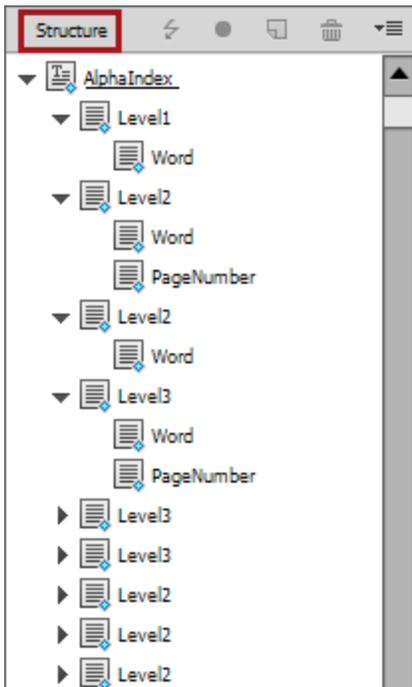
2. Navigate to File > **Import XML...** in the **File** menu to import the index XML file.



3. In the **Import XML** dialog that displays, locate the XML file that you want to import, then click **Open**.
4. Click **OK** on the **XML Import Options** dialog that displays. All settings can be left as-is.



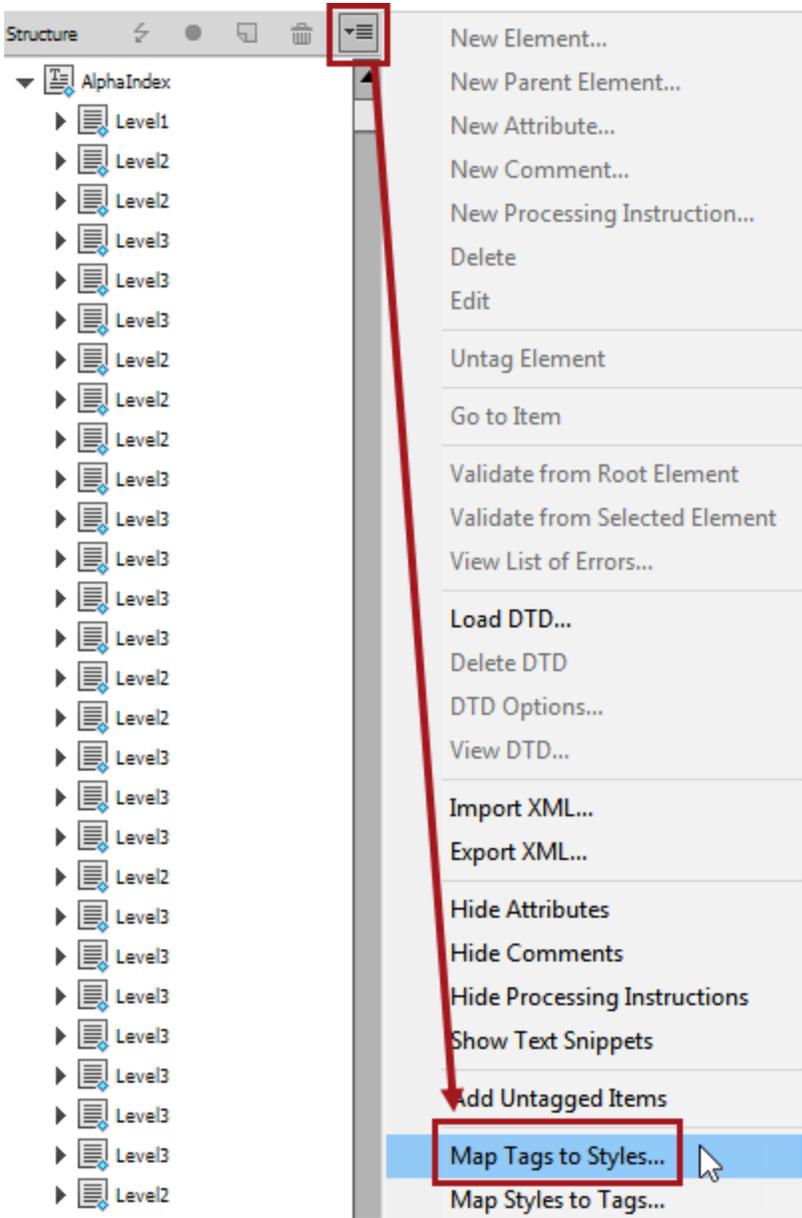
5. The index file (AlphaIndex) displays in the InDesign XML **Structure** window on the left-hand side of the InDesign interface.



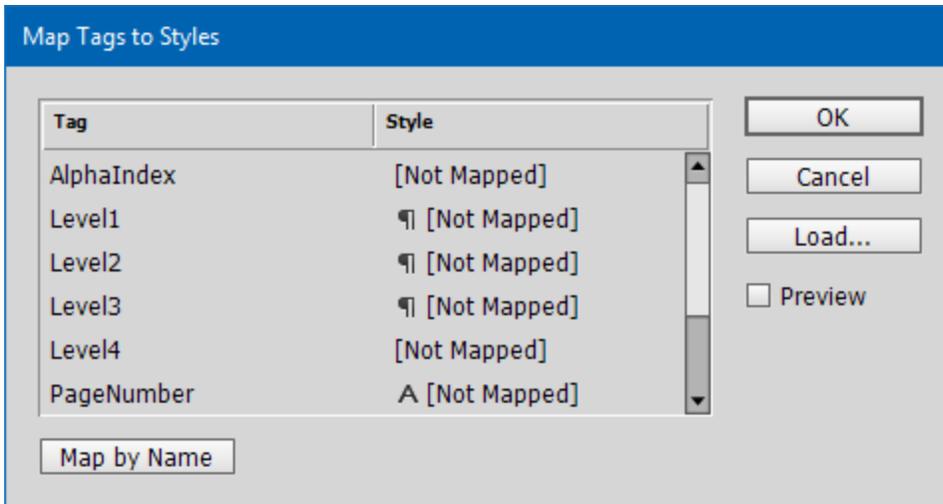
Mapping Styles After Importing the XML

After importing the index XML file, the next step is to map your paragraph and character styles to the XML tags contained within the index file. This mapping ensures that your index will be properly formatted and that styles can be applied automatically upon mounting.

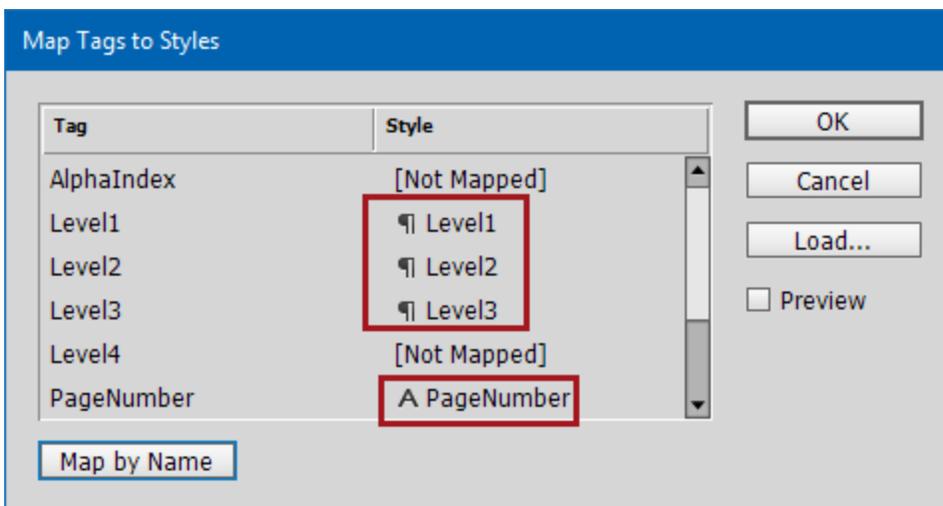
1. Click the **Options** menu in the upper right corner of the InDesign XML structure panel, then click **Map Tags to Styles**.



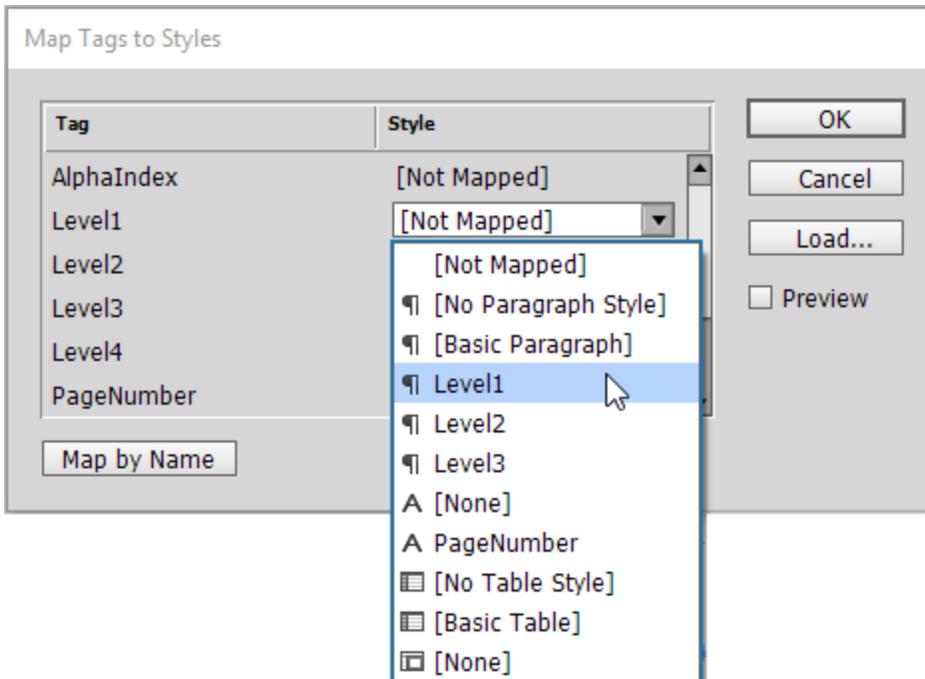
2. The **Map Tags to Style** dialog displays.



3. If your style names are identical to the tag names, click **Map By Name** to automatically map the tags to the styles, then click **OK**.



4. If your style names do *not* match the tag names, they must be mapped.
 - In the **Style** column of the **Map Tags to Styles** dialog, click on [Not Mapped] for each tag that you would like to map.
 - Select the relevant paragraph style or character style from the dropdown list.
 - Follow these steps for the remainder of styles that should be mapped.

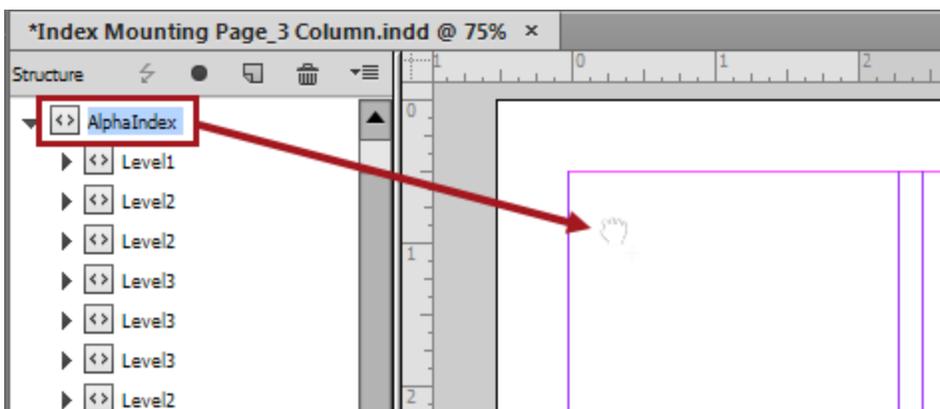


5. Click **OK** when complete.

Mounting the Index XML

After mapping the index tags to the paragraph and character styles, the next step is to mount the index onto the page. The mounting is performed by a drag-and-drop method.

1. Select the AlphaIndex XML file in the InDesign **Structure** panel.
2. While holding down your left mouse button, drag the index onto the page in the desired location (typically the upper left corner of the page).



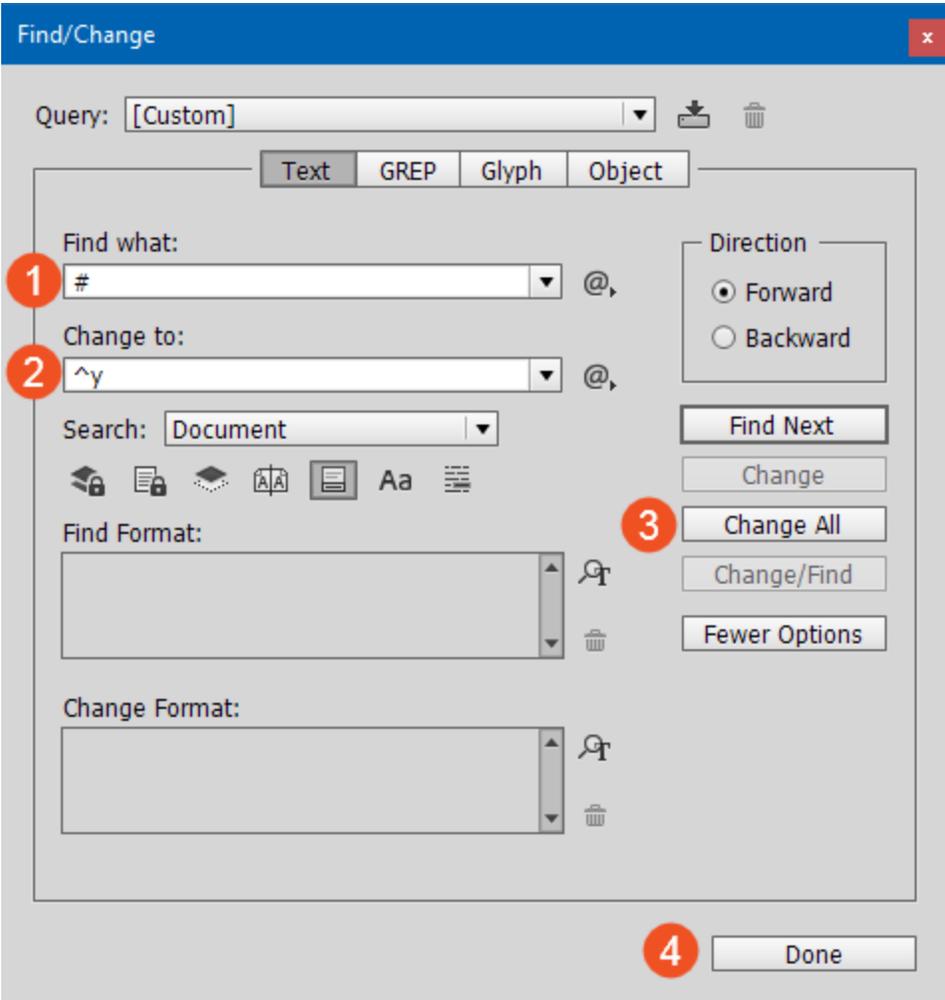
3. The index is now mounted with the relevant mapped styles applied to each level of the index. The next step is to generate the dot leaders by replacing the # characters with tab characters.

A AccurateCut Die Cutting Machines & Dies#282-283 Acid-free Bookplates & Protectors#52 Book Tape#104 Page Protectors#269 Activity Centers/Mirrors#898, 900-903, 939, 947 Activity Tables#828-834, 872, 903, 945, 951, 956 ADA Compliant Circulation Desks#488 Front Covers#1488	Application Cards#133 Applicators Glue#119, 236 Tape#87, 101, 112, 240 Aprons#119, 121 Area Rugs Children's#890, 892, 906-919, 923, 954 Patterned#350-351, 890-892 Teen#351, 890-892 Art Tables 333See Activity Tables#9999 Artwork Prints#894	1033, 1036-1040, 1045, 1047, 1049-1052, 1054-1057 Zipper-lock#173 Band Daters#144-145 Banners Custom#590-591 Flag#420 Library & Reading Promotion#1022-1025, 1050, 1054-1055 Bar Code Duplicating System#24, 129 Label Protectors#4-11, 28 Labels#25-28, 54-55, 57, 175 Scanners#124-127
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Replacing Special Characters With Dot Leaders on the InDesign Page

The final step in mounting the index is to complete the formatting by replacing the # symbols with a right-tab character in InDesign, which will insert the dot leaders.

1. With the mounted index open in InDesign, click on Ctrl+F or Edit > **Find/Change** to open the Find/Change menu.
2. Type # in the 'Find what' field and ^y in the 'Change to' field. ^y is the InDesign character for Right Indent Tab.
3. Click **Change All**, then click **Done**.



4. Your index should now resemble the following:

A [AccurateCut Die Cutting Machines & Dies] 282-283 [Acid-free] [Bookplates & Protectors] 52 [Book Tape] 104 [Page Protectors] 269 [Activity Centers/Mirrors] 898, 900-903, 939, 947 [Activity Tables] 828-834, 872, 903, 945, 951, 956 [ADA Compliant] [Circulation Desks] 488	Applicators [Glue] 119, 236 [Tape] 87, 101, 112, 240 [Aprons] 119, 121 [Area Rugs] [Children's] 890, 892, 906-919, 923, 954 [Patterned] 350-351, 890-892 [Teen] 351, 890-892 [Art Tables] [333See Activity Tables] 9999 [Artwork] [Prints] 894	Zipper-lock 173 [Band Daters] 144-145 [Banners] [Custom] 590-591 [Flag] 420 [Library & Reading Promotion] 1022-1025, 1050, 1054-1055 [Bar Code] [Duplicating System] 24, 129 [Label Protectors] 4-11, 28 [Labels] 25-28, 54-55, 57, 175 [Scanners] 124-127
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Exporting and Importing Publications

Publications may be exported from and imported into STEP in two formats: **Publication Excel** and **STEPXML**. Both formats supports all publication types: standard STEP'n'design ('drag and drop'), Flatplanner, and AutoPage. In addition, publications and their accompanying templates can be exported from one STEP system and imported into another through the use of publication **Transfer Packages**.

Using Publication Excel sheets, STEPXML files, and transfer packages to export and import publications can help reduce the time spent on manual publication-building tasks in the workbench, such as the manual creation of publication hierarchies as well as the linking of product, asset, and classification objects into publication sections. Publication transfer packages not only include this functionality, but they also remove the need to manually link templates into a new publication created from the import.

The ability to export and import publications also greatly simplifies the migration of publications from one STEP system to another, reducing the number of manual steps needed to duplicate and/or rebuild these publications.

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

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

Exporting Publications in Excel

Publications can be exported and imported in an Excel format called **Publication Excel**. The Publication Excel format supports all publication types: standard STEP'n'design ('drag and drop'), Flatplanner, and AutoPage.

The instructions in this section focus on the export process, as the typical first step in using a Publication Excel sheet to import a publication is to *export* a pre-existing publication. This exported Publication Excel file can then be used as a 'template' sheet to import new publications.

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

The following screenshots show a sample Publication Excel spreadsheet in three sections; columns A - F, G-M, and N- W. The Publication Excel format only allows one object per row.

	A	B	C	D	E	F
1	PublicationID	PublicationName	PublicationType	PublicationTemplateID	PublicationInheritedUnit	PubPageTemplateID
2	127311	Zeta Tools	Default publication type	110116	inches	
3						

	G	H	I	J	K	L	M
1	VersionID	VersionName	VersionContextID	VersionWorkspaceID	LayerMappingTemplate	LayerMappingDocument	LayerMappingOwner
2							
3							
4	127314	French FR	Context2	Main			
5					France	France	true
6					Images	Images	false
7	127313	English US	Context1	Main			
8					USA	USA	true
9					Images	Images	true
10	127315	English UK	Context7	Main			
11					UK	UK	true
12					Images	Images	false

	N	O	P	Q	R	S	T	U	V	W
1	SectionLevel	SectionID	SectionName	SectionTypeID	MetaDataAttributeID	MetaDataAttributeValue	RuleSettings	ProductTemplateID	LinkedObjectID	LinkedObjectType
2										
3					CatalogTheme	Zeta Tools 2016	<Action ID="ProductTemplateAction" Type="ProductTemplateAction" parameterTemplateID=			
4										
5										
6								107821		
7	1	109032	Toolboxes	Section			<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndex	108803		
8					SectionTheme	Toolboxes				
9									20881	Product
10									7829	Product
11									20682	Product
12									6806	Product
13	1	109148	Nails and Screws	Section						
14					SectionTheme	Nails and Screws				
15									8108	Product
16									20674	Product
17									7829	Product
18									101118	Product
19									107628	Asset
20									107629	Asset
21	1	109033	Garden Tools	Section			<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndex			
22					SectionTheme	Garden Tools				
23	2	110370	Weed Trimmers	Section						
24	3	110379	Electric	Section						
25	4	110395	Corded	Section						
26	5	110399	25' Cords	Section						
27									109952	Product
28									109951	Product
29									109955	Product
30	5	110403	50' Cords	Section						
31									110049	Product
32									110050	Product
33									109953	Product
34									109954	Product

Information Included in the Export

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

Column Header	Description
PublicationID	STEP ID of exported publication
PublicationName	STEP Name of exported publication
PublicationType	Object type ID of exported publication
PublicationTemplateID	STEP ID of publication template linked to the exported publication
PublicationInheritedUnit	Unit applied to the publication group that contains the publication (mm, inches,

Column Header	Description
	points, or picas)
VersionID	STEP ID of the publication version(s) of the exported publication
VersionName	STEP Name of the publication version(s) of the exported publication
VersionContextID	STEP ID of the context(s) used in the publication version(s) of the exported publication
VersionWorkspaceID	STEP ID of the workspace(s) used in the publication version(s) of the exported publication
LayerMappingTemplate	Name of the layer in the templates (Publication, Product, and InDesign-created Page templates)
LayerMappingDocument	Name of the corresponding layer in the Publication Document (mounting page)
LayerMappingOwner	Displays whether the publication version to which the layer is mapped is the owner of the layer
SectionLevel	A number that represents whether the section is a top-level section (1) or a subsection (2, 3, 4, etc.)
SectionID	STEP ID of the exported publication section(s)
SectionName	STEP Name of the exported publication section(s)
SectionTypeID	Object type ID of the exported publication section(s)
MetaDataAttributeID	STEP ID of metadata (description) attributes linked to the publication or section (column will not appear in the export if there are no values populated for the metadata attributes)
MetaDataAttributeValue	Value of metadata (description) attributes linked to the publication or section (column will not appear in the export if there are no values populated for the metadata attributes)
RuleSettings	Pagination Rules used in the publication(s) and sections

Column Header	Description
	Example: <Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parameterTemplateSpreadIndex="1"> <Condition ID="AlwaysCondition" /> </Action>
ProductTemplateID	STEP ID of the product template(s) linked to the exported publication
LinkedObjectID	STEP ID of the product, asset, or classification object linked into the section(s).
LinkedObjectType	Value will either be 'Product', 'Asset', or 'Classification' depending on whether a product, asset, or classification object is linked to the section(s). 'Product', 'Asset', and 'Classification' are generic terms and do not specify the exact object types of the product, asset, or classification.

Location of Publication Export Information in STEP

The following sections use a sample publication to illustrate where the information included in a Publication Excel export resides in the STEP workbench.

Publication Group Tab (Parent Publication Group)

The **PublicationInheritedUnit** field contains the unit used in the publication. The unit for a publication is set on the publication group parent object that contains the publication. This unit inherits to all publications contained within the publication group.

Publication Group		Status
Description		
Name	> >	Value
ID	>	108372
Name	>	Autopage Publications
Object Type	>	Publication group types
Revision	>	0.1 Last edited by USER on Fri Sep
Path	>	Publications/Autopage Publications
Unit	>	inches
Mail Date (same as Effective)	>	<input type="text" value="31"/>

Publication Tab

In this example, the sample publication contains eight top-level sections, two linked product templates, one metadata (description) attribute that contains a value, and four mapped layers.

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

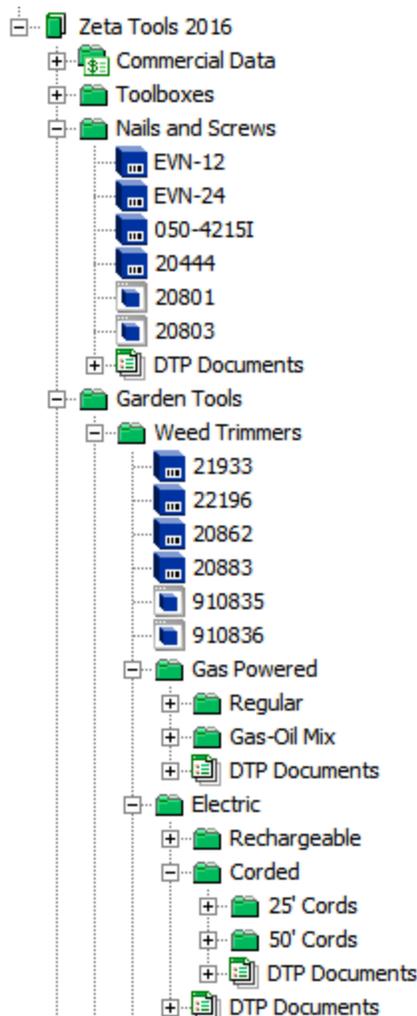
Note: When exporting a 'model' publication in order to use the resulting Publication Excel sheet as a template for later publication imports, it is recommended to populate at least one metadata attribute on the publication (and each section) with a 'dummy' value. This ensures that the **MetaDataAttributeID**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

Zeta Tools - Publication		
AutoPage Publication Planner Pagination Rules Page Inspector Status State Log Tasks		
Publication Plan Version Pages Publication Planner Plan Notes Financial Summary		
Description		
Name	>	Value
> ID		109027
> Name		Zeta Tools
> Object Type		Publication
> Revision		0.4 Last edited by USER4 on Fri Jul 15 13:44:22 EDT 2016
> Path		Publications/AutoPage Publications/Zeta Tools
> Pages per spread		2
> Auto page Document Level		1
> Publication template		Zeta Tools Publication Template (110408)
> Output engine		InDesign
> DTP Queue		
> Effective Date	<input type="text" value="31"/>	
> Expiration Date	<input type="text" value="31"/>	
> Catalog Theme	abc	Zeta Tools
> LastPageNumber	fx	0
Product Templates		
Name		>
> TocIndex		
> Main Product Template		
>		Add template
Page Templates		
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
Import Configurations for Commercial Data		
Name		>
>		Create Import Configuration

Sections, Subsections, Linked Products, and Assets

The sample AutoPage publication also contains subsections (sections within sections), product objects, and asset objects linked to the publication sections.

- The **SectionLevel** column contains a number that represents whether the section is a top-level section (1) or a subsection (2, 3, 4, etc.).
- The **SectionID** and **SectionName** columns contain the STEP IDs and STEP Names of all sections and subsections.
- The **LinkedObjectID** column contains the STEP ID(s) of the product and/or asset objects that are linked to each section.
- The **LinkedObjectType** column contains either 'Product' or 'Asset' depending on whether a product object or an asset object is linked to the section. 'Product' and 'Asset' are generic terms, as the exact object types of the products or assets are not necessary for the Publication Excel format.



Version Tab

All information related to the publication version(s) is included in the export.

1. The **VersionID** column contains the STEP ID(s) of the publication version(s).
2. The **VersionName** column contains the STEP Name(s) of the publication version(s).

- 3. The **VersionContextID** column contains the STEP ID(s) of the context(s) to which each publication version is linked.
- 4. The **VersionWorkspaceID** column contains the STEP ID of the workspace to which each publication version is linked (will either be 'Main' or 'Approved').

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

Pagination Rules Tab

STEPXML code for **Pagination Rules** linked to the publication and/or sections are included in the **RuleSettings** column. The screenshot below shows four pagination rules set at the top level of the publication.

If a publication has no pagination Rules, the **RuleSettings** column will not appear on the exported sheet.

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

Zeta Tools 2016 - Pagination Rules

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

Object Layout

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

Add Rule

Position rules

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

Add Rule

Set publication template spread index

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

Add Rule

Using gap

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

Add Rule

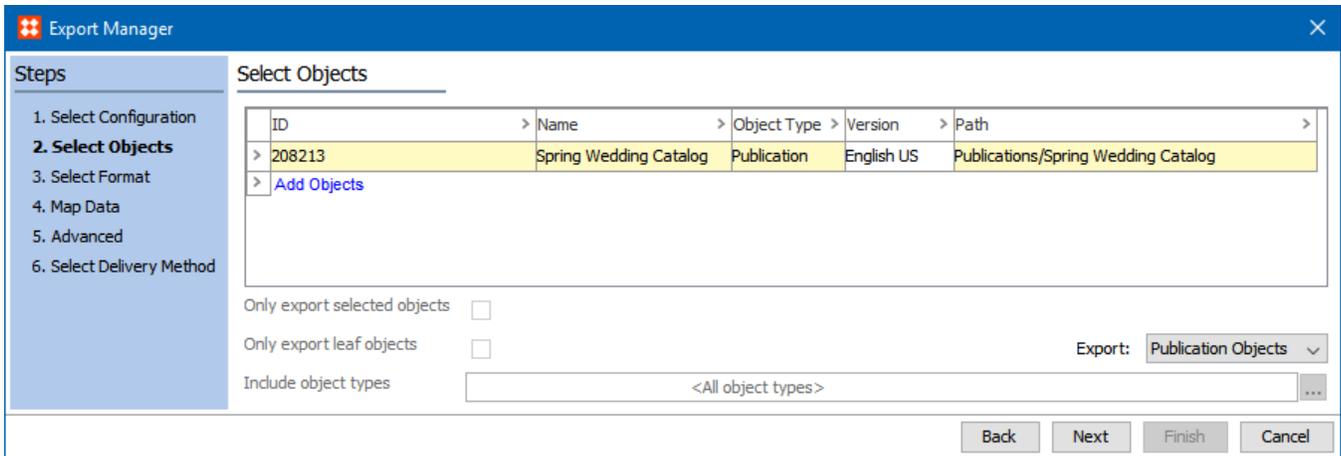
Add Rule Group

Exporting a Publication Excel Sheet

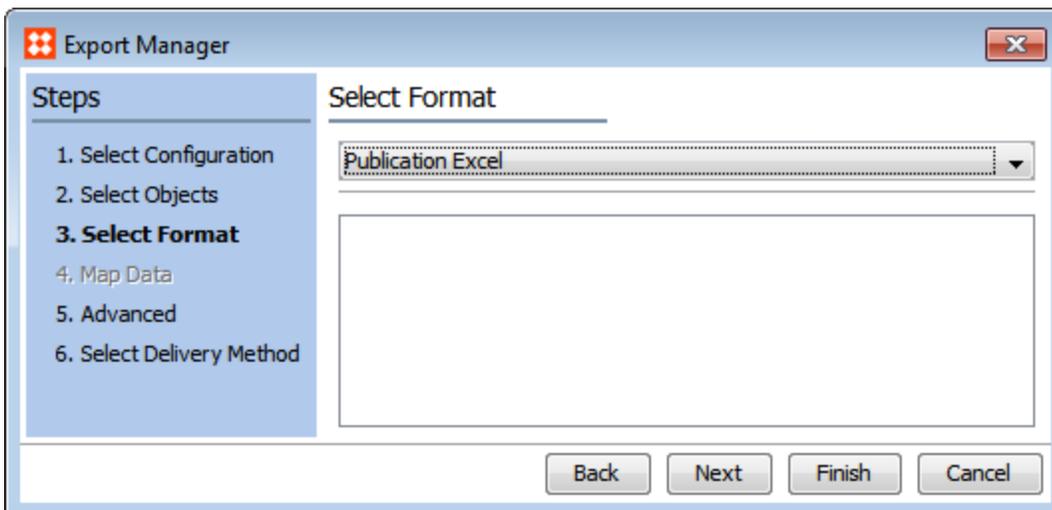
1. Right-click on a publication object and select **Export Data Below**, or go to File > Export > Data. To export in the **Flatplan Excel** format, you may click on either a publication or a section, depending on whether you would like to export a Flatplan from the entire publication or only from a specific section or sections in your export.

Note: If you export directly from the publication or section object, the publication / section will already be selected in Step 2 of the Export Manager (Select Objects), and **Publication Objects** will already be populated in the Export dropdown list. If you wish to export more than one publication / section, click 'Add Objects' and add more publications / sections.

2. Nothing else needs to be done on the Select Objects screen, as all other options are grayed out when **Publication Objects** is selected for export. Click **Next**.



- On the Select Format screen, choose **Publication Excel** from the dropdown list. Click **Next**.



- Since data does not need to be mapped for the Publication Excel format, Step 4 (Map Data) will be skipped.
- On the Advanced screen (Step 5) may be ignored, as adjusting these settings has no impact on the content of the export. (For example, if metadata attributes attached to publication or section objects are populated using Inline References, unchecking 'Resolve Inline References' will not cause the values to export as unresolved.) Click **Next**.
- Choose **File** as the Delivery Method in Step 6, then click **Finish**.
- On the **Save Export Configuration** screen, check 'Save Options' if you would like to save the Export configuration.
- Click **OK**, then retrieve the Excel file.

Considerations and Limitations

- Though multiple publications may be exported in a single Publication Excel file, multiple publications may not be *imported* in the Publication Excel format. To import multiple publications at once, the STEPXML format must be used.
- Support for Publication Excel export is currently unavailable in the Web UI.
- All pagination rules are exported in a single cell. If the exported publication has numerous rules, the character count can grow into the thousands. If the pagination rules character count exceeds of 32,767 characters, an error will occur. If the system property `PublicationExcelExport.OneRulePerCell=true` is added to the `sharedconfig.properties` file, then only one rule will display per row.

For More Information

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

For more information on Flatplanner Excel exports and imports, see **Exporting and Importing Flatplanner Publications in Excel** in the **Flatplanner** documentation.

For more detailed information on Export Manager functionality and the Export Manager wizard, see **Creating a Data Export** section of the **Data Exchange** documentation.

For more information on STEPXML imports, see **STEPXML Format** in the **Data Exchange** documentation.

Importing Publications in Excel

Publications can be imported in an Excel format called **Publication Excel**. All objects required for a publication in the green Publication hierarchy can be created with a Publication Excel import, with the exception of publication group objects. The Publication Excel format supports all publication types: standard STEP'n'design ('drag and drop'), Flatplanner, and AutoPage.

The typical first step in importing a publication in the Publication Excel format is to *export* a pre-existing publication. This exported Publication Excel file can then be used as a 'template' sheet for new publications, i.e., existing information on the export sheet will be replaced with new information for the subsequent import. For more information on the Publication Excel export process, see **Exporting Publications in Excel**.

The following screenshots show a sample Publication Excel spreadsheet that could be used to create a two-version publication with multiple sections and subsections. In addition, this sheet is populated with data that will link product and asset objects to the sections, populate metadata attributes that exist on the publication and sections, and create pagination rules for the publication and sections. Note that the ID fields have been left blank for PublicationID, VersionID, and SectionID, as the intention is for the system to autogenerate these IDs upon import.

Note: It is strongly recommended that the STEP ID is set to autogenerate (by use of an ID Pattern) for the 'Publication Version' Basic Object Type and all object types used to create publications and sections (typically 'Default publication type' and 'Section'). If not, you must provide these IDs in the Publication Excel import sheet. If a Publication ID on the import sheet matches the ID of an existing publication in STEP, the import will simply

update the existing publication. For information on autogenerating STEP IDs, see **Autogenerate using Name Pattern and ID Pattern** in the **System Setup / Super User** documentation.

	A	B	C	D	E	F	G	H	I	J	K	L
	PublicationID	PublicationName	PublicationType	PublicationTemplateID	PublicationInheritedUnit	VersionID	VersionName	VersionContextID	VersionWorkspaceID	LayerMappingTemplate	LayerMappingDocument	LayerMappingOwner
1		Zeta Tools	Default publication type	110408	inches							
2							French FR	Context2	Main			
3										France Images	France Images	true
4							English US	Context1	Main			false
5										USA Images	USA Images	true
6							English UK	Context7	Main			true
7										UK Images	UK Images	false

	M	N	O	P	Q	R	S	T	U	V	W
	SectionLevel	SectionID	SectionName	SectionTypeID	MetaDataAttributeID	MetaDataAttributeValue	RuleSettings	ProductTemplateID	LinkedObjectID	LinkedObjectType	
1					CatalogTheme	Zeta Tools 2017	<Action ID="ProductTemplateAction" Type="ProductTemplateAction" parameterTemplateID="107821" parameterTemplateTitle=				
2								107821			
3								108803			
4											
5											
6											
7	1		Toolboxes	Section	SectionTheme	Toolboxes	<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parameterTemplateSpre				
8									20881	Product	
9									7829	Product	
10											
11	1		Nails and Screws	Section	SectionTheme	Nails and Screws					
12											
13											
14											
15											
16	1		Garden Tools	Section	SectionTheme	Garden Tools	<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parameterTemplateSpre				
17											
18											
19	2		Weed Trimmers	Section							
20											
21											
22	3		Electric	Section							
23											
24	4		Corded	Section							

Mandatory and Optional Information for Publication Excel Imports

The following table outlines the contents of a **Publication Excel** import spreadsheet and whether the fields are mandatory or optional. The columns are ordered from top to bottom as they would appear left to right when exported from STEP. Columns can be reordered or removed before import as long as there is only one object per row. Columns may be reordered or removed if, for example, you find that a certain order is more intuitive or if you would like to work with a more compact spreadsheet that contains only the columns that you need.

Though a publication template and product template(s) are required to manually create a publication in STEP, this is not the case for Publication Excel imports. The fields for PublicationTemplateID and ProductTemplateID are listed as optional in the following table because templates can be linked to publication(s) in STEP *after* the publication is created. In addition, a Publication Excel import can create sections without a designated version, hence the optional designation for VersionID. This functionality is useful if you would like to quickly create the structure of a publication before deciding which templates or versions you will need. The bare minimum amount of information that is required to create a publication with a Publication Excel import is the object type ID of the publication and the object type ID(s) of the section objects.

Note: Even though the system will allow a Publication Excel import to create a publication without a version, it is not recommended to do so. A version must still be created before the publication can actually be used for production, as actual pages cannot be built in InDesign without a version.

Column Header	Description	Mandatory?
PublicationID	STEP ID of imported publication	No

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

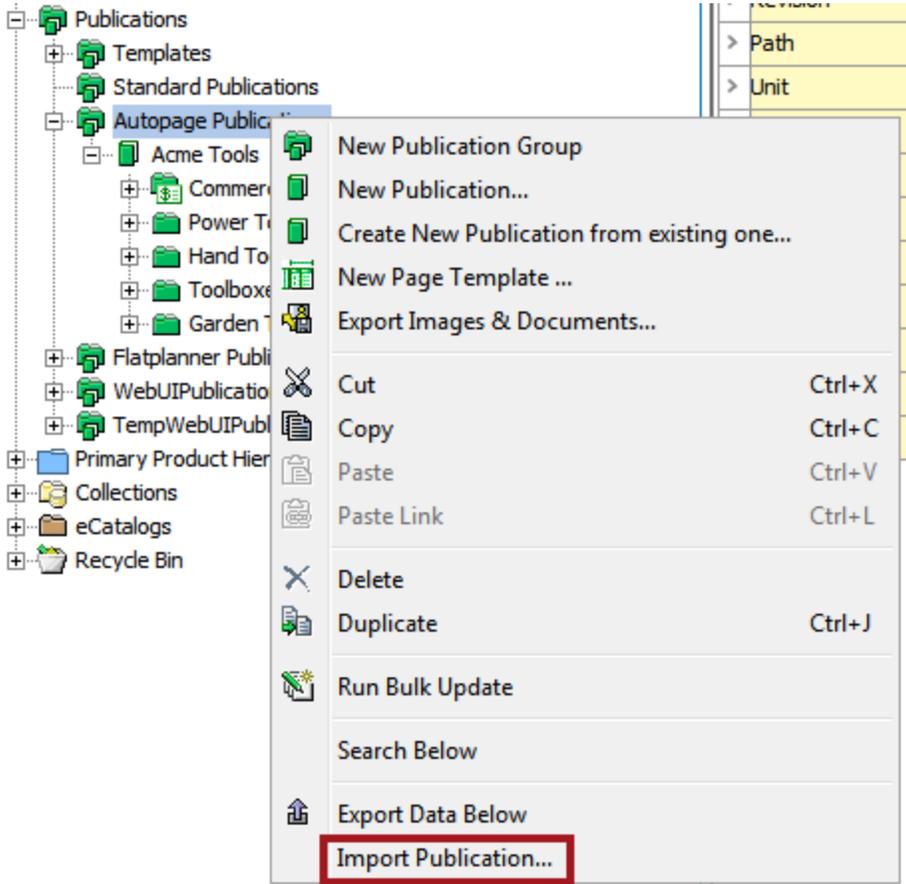
Column Header	Description	Mandatory?
VersionContextID	STEP ID of the Context(s) used in the publication version(s) of the imported publication	<p>No, but it is strongly recommended to provide this information.</p> <p>If not provided in the import, the Version Context ID must be manually added to the publication before it can be used for production.</p>
VersionWorkspaceID	STEP ID of the workspace(s) used in the publication version(s) of the imported publication	<p>No, but it is strongly recommended to provide this information.</p> <p>If not provided in the import, the Version Workspace ID must be manually added to the publication before it can be used for production.</p>
LayerMappingTemplate	Name of the document layers in the templates (Publication, Product, and InDesign-created Page templates)	No
LayerMappingDocument	Name of the corresponding document layers in the Publication Document (mounting page)	No
LayerMappingOwner	Whether the publication version to which the layer is mapped is the owner of the layer ('true' for yes, 'false' for no)	No
SectionLevel	A number that represents whether the section is a top-level section (1) or a subsection (2, 3, 4, etc.)	<p>No</p> <p>(Yes if you do not want all sections to import as top-level sections)</p>
SectionID	STEP ID of the imported publication section(s)	<p>No</p> <p>(Yes if the STEP ID of</p>

Column Header	Description	Mandatory?
		the section object type is not set to autogenerate)
SectionName	STEP Name of the imported publication section(s)	No
SectionTypeID	Object type ID of the imported publication section(s)	Yes
MetaDataAttributeID	STEP ID of metadata (description) attributes linked to the publication or section	No
MetaDataAttributeValue	Value of metadata (description) attributes linked to the publication or section	No
RuleSettings	<p>Pagination Rules used in the publication(s) and sections</p> <p>Example: <Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parameterTemplateSpreadIndex="1"> <Condition ID="AlwaysCondition" /> </Action></p>	No
ProductTemplateID	STEP ID of the product template(s) linked to the imported publication	<p>No, but it is strongly recommended to provide this information.</p> <p>If not provided in the import, a product template must be manually linked to the publication before it can be used for production.</p>
LinkedObjectID	STEP ID of the product, asset, or classification object linked into the section(s)	No
LinkedObjectType	Value will either be 'Product', 'Asset', or 'Classification' depending on whether a product, asset, or classification object is linked to the section(s). 'Product', 'Asset', and 'Classification' are generic terms and do not specify the exact object types of the	<p>No</p> <p>(Yes if you have provided a LinkedObjectID, as the possibility exists that a</p>

Column Header	Description	Mandatory?
	product, asset, or classification.	product object and asset object could share the same STEP ID)

Importing a Publication Excel Sheet

1. Right-click on the publication group object in which you would like to create your publication, then select **Import Publication**.



2. In the **Select Excel file** dialog that displays, navigate to the desired Publication Excel file, then click **Open**.
3. In the **Save Import Configuration** dialog that displays, select **Start Import Process**, then click **OK**. The file will import with no additional prompts, as columns do not need to be mapped for Publication Excel imports. STEP automatically recognizes the file format, which is pre-mapped.

Importing a Publication Excel Sheet – Alternate Methods

Alternately, you may import a Publication Excel sheet by the following methods:

- Import Manager (File > Import > Data)
- Hotfolders (IIEP)
- Publishing Web UI (Import Publication XLS Action)

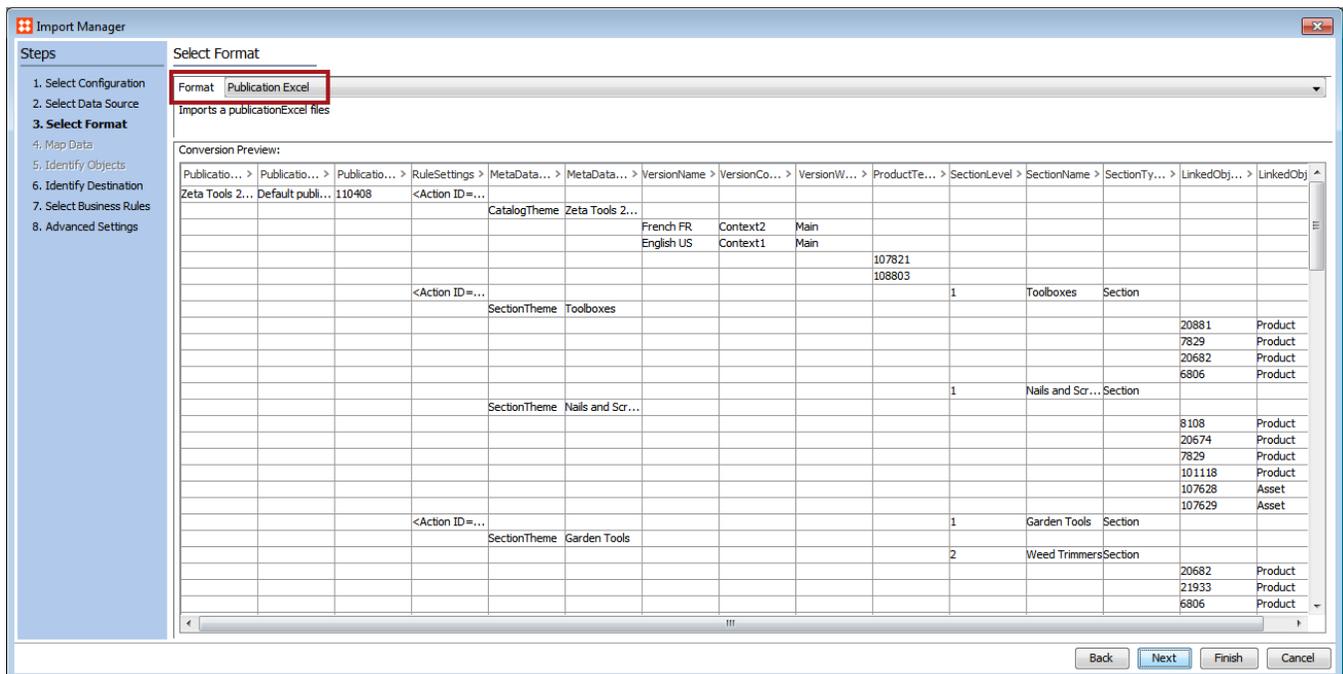
Importing Publication Excel Files in the Import Manager (File > Import > Data)

The File > Import > Data method launches the **Import Manager** wizard, which involves more screens to click through but provides more control over what happens when the Publication Excel file is imported. Some standard options in the Import Manager wizard are available for the Publication Excel import format just as they are for other formats, including the ability to perform a test-only import and run business rules on import.

Note: The imported publication will be created beneath the top (root) node of the Publication hierarchy if this option is chosen.

The following steps presume that a new import configuration is being created.

1. In **Step 1** (Select Configuration), choose Create New Import. Click Next.
2. In **Step 2** (Select Data Source), choose the Publication Excel file that you would like to import. Click Next.
3. In **Step 3** (Select Format), the Publication Excel format will already be selected and the Import Manager will display a preview of the file. This visual representation of the file may prove useful as a 'final check' on the import sheet's contents before proceeding with the import. Click Next. Steps 4 and 5 will be skipped.



4. In **Step 6** (Identify Destination), all settings may be ignored, as none of them apply to publication objects. However, you may check **Test Only Import** if you would like to run the import as test only. Click Next.

- 5. In **Step 7** (Select Business Rules), business conditions and/or actions may be selected if workflows have been configured for publication and/or section objects. Click **Next**.
- 6. In **Step 8** (Advanced Settings), all settings may be ignored. Click **Finish**.
- 7. Check **Save Options** on the Save Import Configuration screen if you would like to save the Publication Excel import configuration. Click **OK** to complete.

Importing Publication Excel Files Via Hotfolders

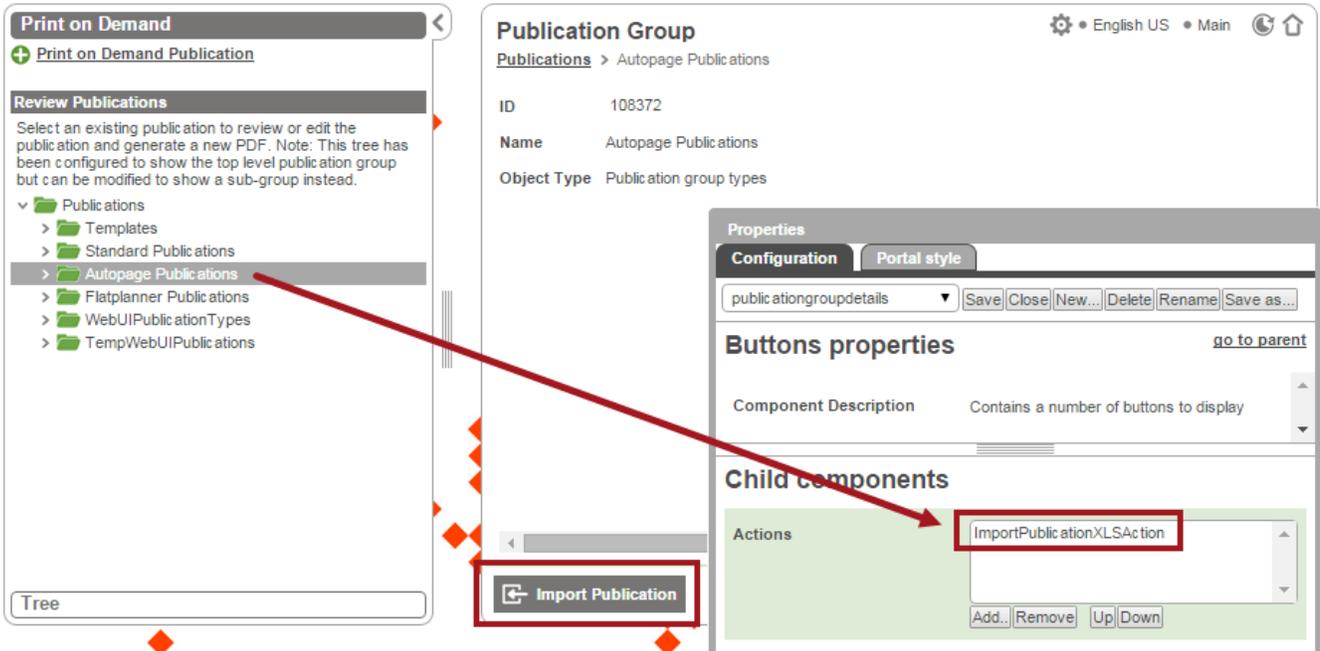
Publication Excel files may also be uploaded via hotfolders, which are configured through Inbound Integration Endpoints (IIEPs). Configuring an IIEP for Publication Excel imports is similar to configuring a Publication Excel import using the standard Import Manager.

Note: The imported publication will be created beneath the top (root) node of the Publication hierarchy if this option is chosen.

For more information on configuring hotfolders and IIEPs, see **Creating an Inbound Integration Endpoint** in the **Data Exchange** documentation.

Importing Publication Excel Files in Web UI

In the Web UI, Publication Excel import functionality is available through the Import Publication XLS Action, which can be added as a button on a Node Details component. It is intended to be used from a publication group details screen, as publications must be imported into a publication group folder.



Considerations and Limitations

- Though multiple publications may be exported in a single Publication Excel file, multiple publications may not be *imported* in the Publication Excel format. To import multiple publications at once, the STEPXML format must be used. For more information on STEPXML imports, see **STEPXML Format** in the **Data Exchange** documentation.
- Import of layer mapping information is not currently available in either the Publication Excel or the STEPXML format.

For More Information

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

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

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

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

Linking Objects to the Publication Hierarchy by Excel Import

Product, classification, and asset objects may be linked to publication sections in the Publication (green) hierarchy by using a **Publication Excel** import sheet.

Though the Publication Excel format can be used to create entire publications on import, it can also be used to link objects into the sections of *existing* publications.

Note: The Publication Excel format will only link objects to publication *sections*. If you need to link objects to a *publication*, this linking must be performed manually. See the **Linking and Unlinking Publication Products, Assets, and Classifications** section of the **Getting Started / STEP User Guide**.

To obtain the 'template' spreadsheet that you will use for your import, you should first *export* the publication into which you would like to link your objects. To export the publication, follow the steps outlined in the **Exporting a Publication Excel Sheet** section of the **STEP'n'design** documentation.

Once you have the Publication Excel sheet, follow these steps to link objects to the sections within your publication. The first two steps are optional, as columns do not actually need to be removed for the sheet to function correctly. However, removing extraneous columns makes the sheet easier to manage.

1. Delete all columns between **PublicationID** and **SectionLevel** (in this example, columns B through J).

	A	B	C	D	E	F	G	H	I	J	K
1	PublicationID	PublicationName	PublicationType	PublicationTemplateID	PublicationInheritedUnit	PubPageTemplateID	VersionID	VersionName	VersionContextID	VersionWorkspaceID	SectionLevel
2	177994	Acme Tools	Default publication type	110408							
3											
4							177996	French FR	Context2	Main	
5							177997	English US	Context1	Main	
6											

2. Delete all columns after **SectionTypeID** (in this example, F through H).

	A	B	C	D	E	F	G	H
1	PublicationID	SectionLevel	SectionID	SectionName	SectionTypeID	MetaDataAttributeID	MetaDataAttributeValue	RuleSettings
2	177994							<Action ID= Rept
3						CatalogTheme	Acme Tools	

3. Add two columns at the end with these headers: **LinkedObjectID** and **LinkedObjectType**.

	A	B	C	D	E	F	G
1	PublicationID	SectionLevel	SectionID	SectionName	SectionTypeID	LinkedObjectID	LinkedObjectType
2	177994						
3		1	177998	Toolboxes	Section		
4							
5		1	177999	Nails and Screws	Section		
6							
7		1	178000	Garden Tools	Section		
8							
9		2	178001	Weed Trimmers	Section		
10		3	178002	Gas Powered	Section		
11		4	178003	Gas-Oil Mix	Section		
12		4	178004	Regular	Section		
13		1	178005	Gloves	Section		

4. Insert blank rows beneath each **Section** into which you would like to link products, assets, and/or classifications. Then, enter the STEP IDs of the linked objects in the **LinkedObjectID** column, starting with the row directly beneath the appropriate Section row.

	A	B	C	D	E	F	G
1	PublicationID	SectionLevel	SectionID	SectionName	SectionTypeID	LinkedObjectID	LinkedObjectType
2	177994						
3		1	177998	Toolboxes	Section		
4						18210	
5						18212	
6						18213	
7						18216	
8						100812	
9						168527	
10						100703	
11						100305	
12						18207	
13						18214	
14						18215	
15						18217	
16						20803	
17							
18		1	177999	Nails and Screws	Section		
19							
20		1	178000	Garden Tools	Section		

A list of STEP IDs of products, assets, and/or classifications may be obtained by exporting the relevant objects—in Excel format—from their respective hierarchies in STEP or from a Collection. These IDs can then be pasted into the **LinkedObjectID** column of the Publication Excel sheet where needed. See the **Excel Format** section of the **Data Exchange** documentation for more information.

5. In the **LinkedObjectType** column, enter 'Product', 'Asset', or 'Classification', depending on what type of object is being linked.

Note: The generic terms 'Product', 'Asset', and 'Classification' are required; the actual object types of the linked items should not be specified.

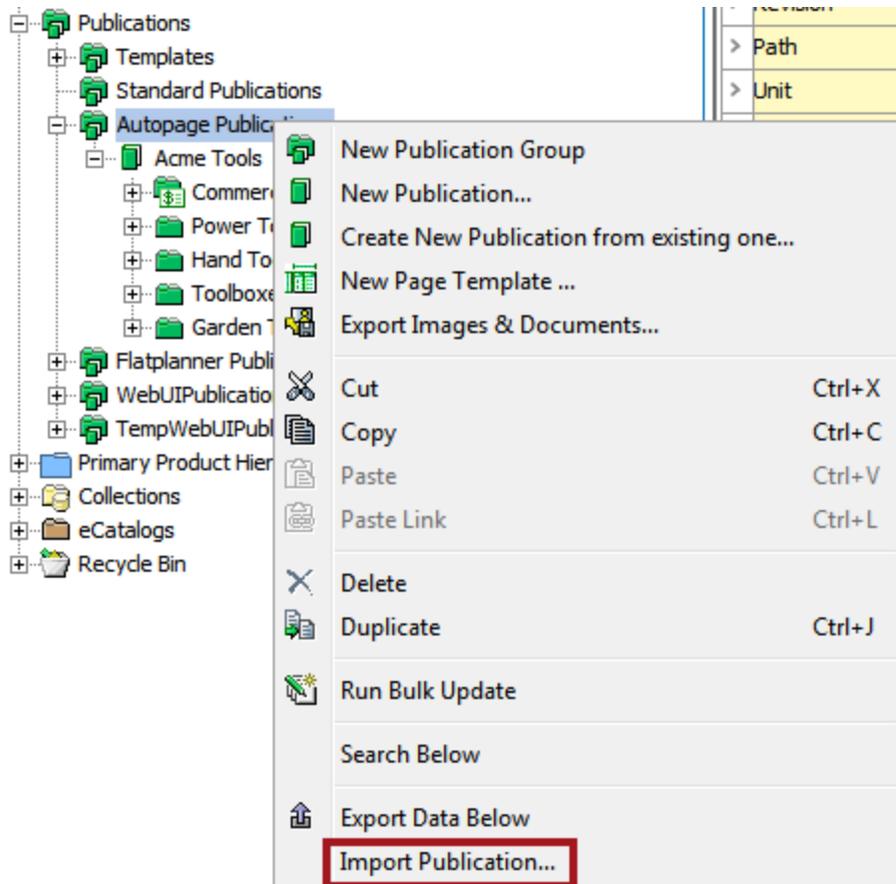
	A	B	C	D	E	F	G
1	PublicationID	SectionLevel	SectionID	SectionName	SectionTypeID	LinkedObjectID	LinkedObjectType
2	177994						
3		1	177998	Toolboxes	Section		
4						18210	Product
5						18212	Product
6						18213	Product
7						18216	Product
8						100812	Product
9						168527	Product
10						100703	Product
11						100305	Product
12						18207	Product
13						18214	Product
14						18215	Product
15						18217	Asset
16						20803	Classification
17							
18		1	177999	Nails and Screws	Section		

6. Repeat the above steps for each additional section into which you would like to link objects.

Importing the Sheet

Once all STEP IDs and object type designations have been added to the sheet, import it into your publication by following these steps:

1. Right-click on the publication group that contains your publication and select **Import Publication....**



2. In the **Select Excel file** dialog that displays, navigate to the desired Publication Excel file, then click **Open**.
3. In the **Save Import Configuration** dialog that displays, select **Start Import Process**, then click **OK**. The file will import with no additional prompts, as columns do not need to be mapped for Publication Excel imports. STEP automatically recognizes the file format, which is pre-mapped.
4. When the background process successfully completes, the product, asset, and/or classification objects will be linked into the publication sections.

For more information on other ways to import a Publication Excel sheet (for example, by using the Import Manager or in Web UI), see the **Importing a Publication Excel Sheet** section of the **STEP'n'design** documentation.

Exporting and Importing Publications in STEPXML

Publications and publication hierarchies can be exported and imported using the STEPXML file format. STEPXML supports publications created with any STEP publisher component: STEP'n'design (standard 'drag and drop'), Flatplanner, and AutoPage. The STEPXML format is available when exporting from any node in the publication hierarchy—publication group, publication, or section.

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

Importing a Publication in STEPXML

Publications and publication structures can be created by importing a STEPXML file. This same file can also be used to link the relevant publication template and product templates to the publication, populate metadata attributes on the publication objects, and more. An example of a STEPXML file that can be used to import a publication is provided later in this topic in the 'File Example' section.

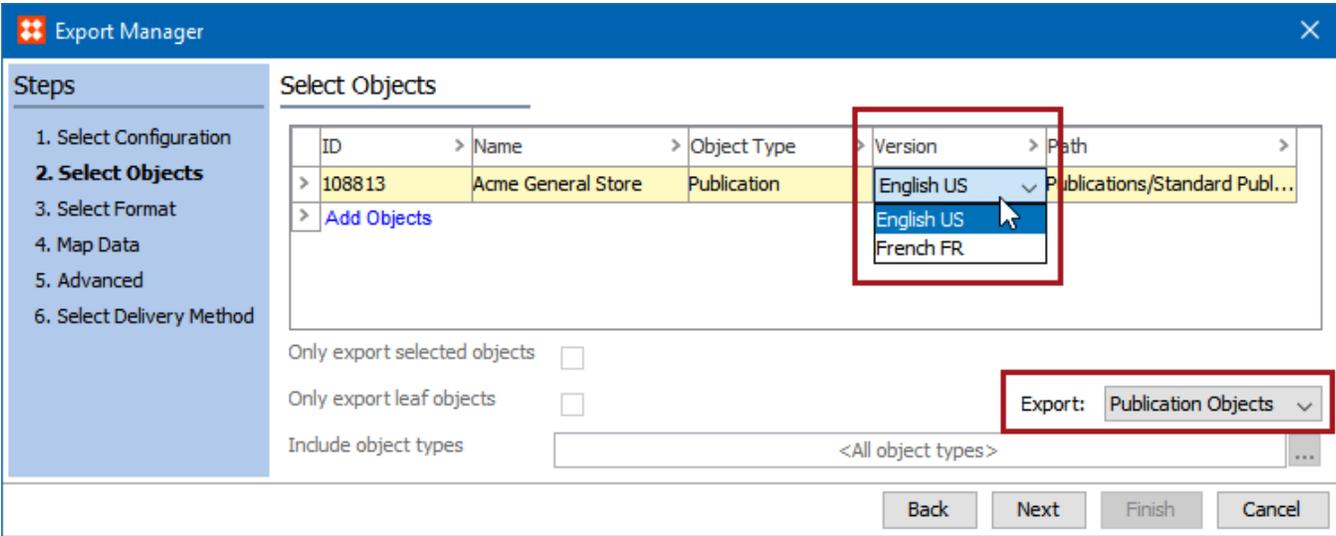
Instructions on how to import the STEPXML file itself are not detailed in this topic since the steps are the same as those for importing any other type of data into STEP using STEPXML.

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

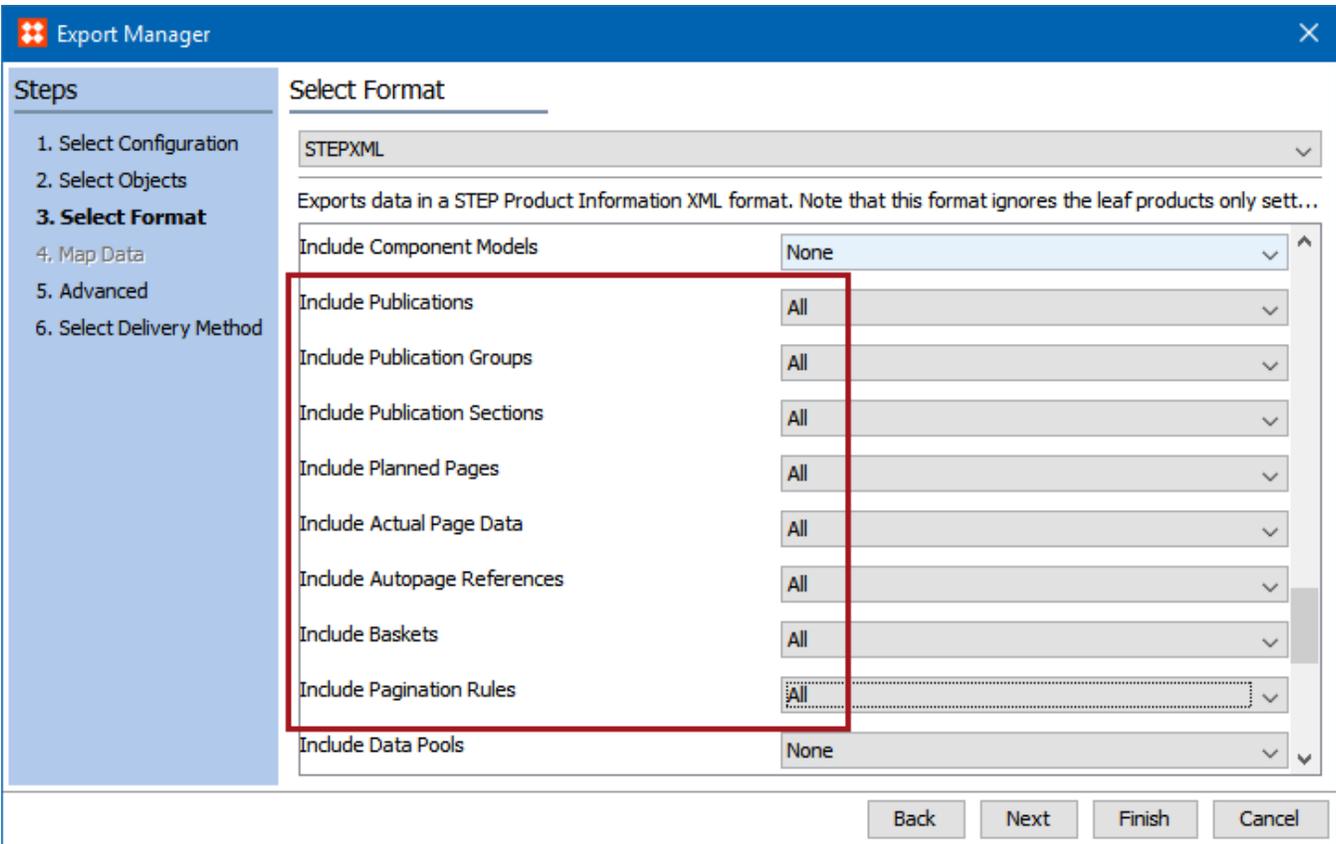
Exporting a Publication in STEPXML

The overall steps to export a publication in the STEPXML format using the Export Manager are the same as those used in exporting any other type of data from STEP. The following steps describe the additional publication-specific options that must be chosen, such as the outbound parameters that are chosen in the Select Format step of the wizard.

1. To initiate the export, follow the initial steps outlined in the **Creating a Data Export** topic in the **Export Manager** documentation.
2. On the Select Objects screen, add the publication hierarchy object(s) that you would like to export by following the steps outlined in the **Export Manager - Select Objects** topic in the **Export Manager** documentation. You can also initiate the export by right-clicking on a publication group, publication, or section object in the publication hierarchy and selecting 'Export Data Below.'
3. Choose **Publication Objects** from the 'Export' dropdown in the lower right corner of the wizard, then click **Next**.
 - If the publication contains more than one version, a version can be selected from the dropdown list in the **Version** column. Typically, the contents of the export will be the same regardless of which version is selected. However, in some cases it may be necessary to select a version if there are differences on actual pages saved to STEP. For example, a different product or asset may be mounted to an English version but not a French version.



4. On the Select Format screen (step 3), choose **STEPXML** from the dropdown list.
5. The STEPXML outbound parameters that apply to publication objects are highlighted in the below screenshot.



Choose the relevant information that you want to include in your export, then click **Next**. All other default options can be left as-is (for example, 'Include Products' = Minimum).

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

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

Note: Include Autopage References is also relevant for standard 'drag and drop' publications if objects have been linked to the publication sections to organize them for mounting. However, since it is more common practice to link objects to sections in AutoPage publications, this option is instead detailed in **Exporting and Importing AutoPage Publications in STEPXML** in the **AutoPage** documentation.

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

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

File Example

The following STEPXML sample shows an export from a standard publication that contains two versions, three sections, and metadata attributes on the publication and section objects.

Note: This example does not contain code for Actual Page Data, since that information is only of value for exports. It cannot be imported into STEP to create actual pages. See the 'Include Actual Page Data' section below in this topic for a code sample.

```

<STEP-ProductInformation ExportContext="Context1" ContextID="Context1" WorkspaceID="Main"
UseContextLocale="false">
<PublicationGroups>
  <PublicationGroup UserTypeID="Publication group root" ParentID="108372" ID="115722">
    <Name>Standard Publications</Name>
    <Publication UserTypeID="Default publication type" MasterDocumentID="107822"
DTPType="InDesign" ParentID="108372" ID="111508">
      <Name>Beta Tools</Name>
      <MetaData>
        <Value AttributeID="LastPageNumber" Derived="true">0</Value>
      </MetaData>
      <Version ContextID="Context1" WorkspaceID="Main" ID="111511">
        <Name>English US</Name>
      </Version>
      <Version ContextID="Context2" WorkspaceID="Main" ID="111510">
        <Name>France FR</Name>
      </Version>
      <ProductTemplateLink ProductTemplateID="107821"/>
      <PublicationSection ID="111512" UserTypeID="Section">
        <Name>Power Tools</Name>
        <MetaData>
          <Value AttributeID="LastPageNumber" Derived="true">0</Value>
          <Value AttributeID="FirstPageNumber" Derived="true">0</Value>
        </MetaData>
      </PublicationSection>
      <PublicationSection ID="111513" UserTypeID="Section">
        <Name>Hand Tools</Name>
        <MetaData>
          <Value AttributeID="LastPageNumber" Derived="true">0</Value>
          <Value AttributeID="FirstPageNumber" Derived="true">0</Value>
        </MetaData>
      </PublicationSection>
      <PublicationSection ID="111514" UserTypeID="Section">
        <Name>Toolboxes</Name>
        <MetaData>
          <Value AttributeID="LastPageNumber" Derived="true">0</Value>
          <Value AttributeID="FirstPageNumber" Derived="true">0</Value>
        </MetaData>
      </PublicationSection>
    </Publication>
  </PublicationGroup>
</PublicationGroups>
</STEP-ProductInformation>

```

```

    </MetaData>
  </PublicationSection>
</Publication>
</PublicationGroup>
</PublicationGroups>
</STEP-ProductInformation>

```

Information Included in the Export

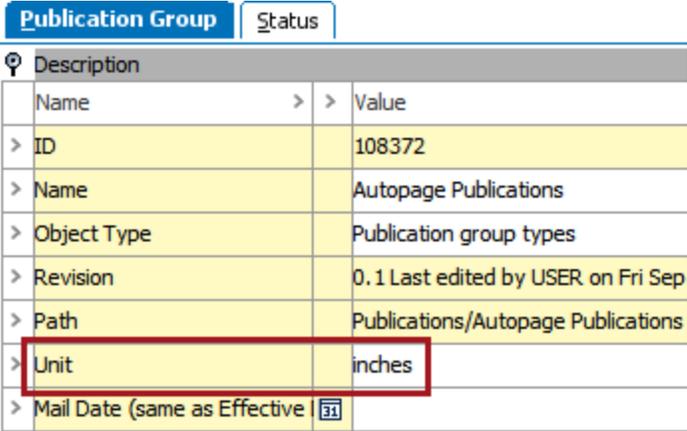
The following sections explain the data included in the STEPXML file in the order in which it appears in the file.

Include Publication Groups

```

</PublicationGroup>
<PublicationGroup UserTypeID="Publication group root" ParentID="Publication hierarchy root" ID="108198" UnitID="inches">
  <Name>Flatplanner Publications</Name>
  <MetaData>
    <Value AttributeID="LastPageNumber" Derived="true">0</Value>
    <Value AttributeID="CatalogGroupTheme">Acme Party Supplies - Since 1955</Value>
  </MetaData>
</PublicationGroup>

```

Tag	Description
<PublicationGroup>	<p>Returns the following information:</p> <ul style="list-style-type: none"> UserTypeID: The object type of the publication group ParentID: The ID of the parent publication group ID: The STEP ID of the publication group UnitID: The ID of the default unit set on the publication group 
<Name>	Returns the STEP name of the publication group

Tag	Description
<MetaData>	Parent tag for <Value> tags
<Value>	Returns the ID (AttributeID) and value of the description (metadata) attributes present on the publication group. If an attribute is calculated, Derived="true".

Include Publications & Include Publication Sections

```
<Publication UserTypeID="Default publication type" MasterDocumentID="107822" DTPTYPE="InDesign" ParentID="108718" ID="108813">
  <Name>Acme Toys</Name>
  <MetaData>
    <Value AttributeID="CatalogTheme">Acme General Store</Value>
    <Value AttributeID="LastPageNumber" Derived="true">0</Value>
  </MetaData>
  <Version ContextID="Context2" WorkspaceID="Main" ID="208627">
    <Name>French FR</Name>
  </Version>
  <Version ContextID="Context1" WorkspaceID="Main" ID="123669">
    <Name>English US</Name>
  </Version>
  <ProductTemplateLink ProductTemplateID="107821"/>
  <ProductTemplateLink ProductTemplateID="108803"/>
  <PublicationSection ID="108819" UserTypeID="Section">
    <Name>Dolls</Name>
    <MetaData>
      <Value AttributeID="FirstPageNumber" Derived="true">0</Value>
      <Value AttributeID="LastPageNumber" Derived="true">0</Value>
    </MetaData>
  </PublicationSection>
</Publication>
```

Publication Information

Tag	Description
<Publication>	<p>Returns the following information:</p> <ul style="list-style-type: none"> • UserTypeID: The object type of the publication • MasterDocumentID: The ID of the publication template linked to the publication • DTPTYPE: The DTP (desktop publishing) platform used in the publication, which will always be InDesign. This is a backward-compatible tag from previous versions of STEP where there could have been a choice between InDesign and Quark as the DTP type. • ParentID: The ID of the publication's parent publication group • ID: The ID of the publication

Tag	Description
<Name>	Returns the STEP name of the publication
<MetaData>	Parent tag for <Value>
<Value>	Returns the ID and value of the description (metadata) attributes present on the publication. If an attribute is calculated (as shown in the above example), Derived="true".
<Version>	Returns the following information: <ul style="list-style-type: none"> ContextID: The ID of the context used in the publication version WorkspaceID: The ID of the workspace used in the publication version ID: The ID of the publication version
<Name>	When nested inside the <Version> tag, returns the STEP name of the publication version
<ProductTemplateLink>	Returns the ID of the product template(s) linked to the publication (ProductTemplateID=)

Section Information

Tag	Description
<PublicationSection>	Returns the ID and object type ID (UserTypeID) of the publication section(s) contained within the publication
<Name>	Returns the STEP name of the publication section
<MetaData>	Parent tag for <Value>
<Value>	Returns the ID and value of the description (metadata) attributes present on the publication section. If an attribute is calculated (as shown in the above example), Derived="true".

Include Actual Page Data

When actual mounted InDesign pages are saved into STEP, they appear in the STEPXML file as <Assets>.

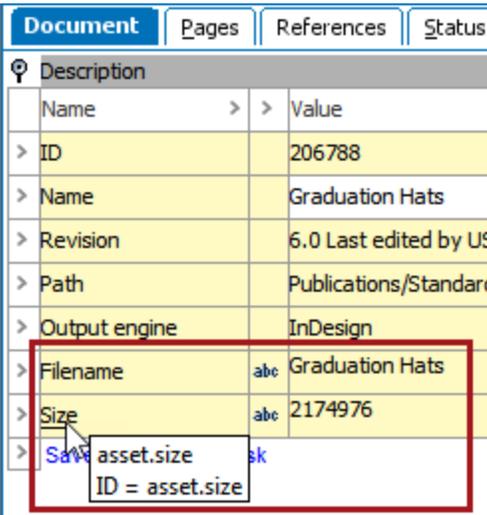
Note: Actual page assets are not nested within the publications that contain them but appear in a separate section in the XML file. The **VersionID** indicates which publication version the assets are stored in. To determine the publication, the version should be matched to the publication that contains it. The VersionID for the pages will typically match the publication version is chosen in the Select Objects step of the Export Manager.

```

<Assets>
  <Asset ID="111824" UserTypeID="InDesign Document">
    <Name>PetPartyHats</Name>
    <Values>
      <Value AttributeID="asset.size">1417216</Value>
      <Value AttributeID="asset.filename">PetPartyHats.indd</Value>
    </Values>
    <Pages>
      <Page ID="111825" VersionID="111818" PageNumber="1">
        <Name>1</Name>
        <ProductCrossReference ProductID="121190" Type="MountedProduct" MountLocation="true"/>
        <ProductCrossReference ProductID="121183" Type="MountedProduct" MountLocation="true"/>
        <ProductCrossReference ProductID="121218" Type="MountedProduct" MountLocation="true"/>
        <AssetCrossReference AssetID="111667" Type="MountedAsset"/>
        <AssetCrossReference AssetID="111666" Type="MountedAsset"/>
        <AssetCrossReference AssetID="111663" Type="MountedAsset"/>
      </Page>
    </Pages>
  </Asset>
</Assets>

```

Tag	Description
<Asset>	Returns the ID and the UserTypeID (object type) of the InDesign document, which will always be 'InDesign Document.'
<Name>	Returns the STEP name of the InDesign document. This can be different from the file name returned within the <Value> tag.
<Value>	Returns the values of the system metadata attributes 'asset.size' and 'asset.filename'

Tag	Description
	
<Page>	<p>Returns the following information:</p> <ul style="list-style-type: none"> • ID of the page • VersionID: The ID of the publication in which the page is stored • PageNumber: The page number of the individual pages within the InDesign document. InDesign documents typically have multiple pages.
<ProductCrossReference>	<p>Returns the following information:</p> <ul style="list-style-type: none"> • ID of the products mounted onto the page • The 'reference type' of the product 'link' (Type="MountedProduct") • The status of whether the product is actually on the page (MountLocation="true") <hr/> <p>Note: No actual reference or link types are used to link products onto pages. They are linked onto pages by being mounted in InDesign.</p>
<AssetCrossReference>	<p>Returns the following information:</p> <ul style="list-style-type: none"> • ID of the assets mounted onto the page • The 'reference type' of the asset 'link' (Type="MountedAsset"). <hr/> <p>Note: No actual reference or link types are used to link assets onto pages. They are linked onto pages by being mounted in InDesign.</p>

Working with Publication Transfer Packages

Publications and their accompanying templates can be exported from one STEP system and imported into another through the use of **publication transfer packages**.

Publication transfer packages enable the exporting of entire STEP publications and their associated templates into a .ZIP folder, which can in turn be easily imported to STEP in a single operation. These transfer packages contain the following items:

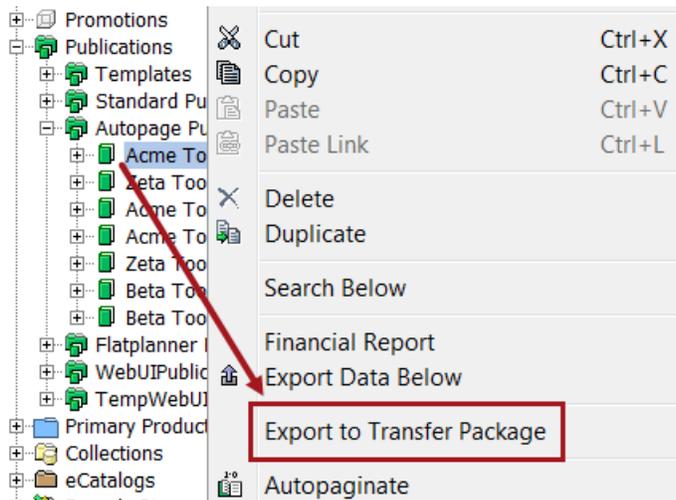
- Publication Excel spreadsheet
- Publication STEPXML file
- Publication templates
- Product templates
- Page templates *(for Flatplanner publications only)*
- XML mapping files that link the STEP names of all templates to STEP IDs
- Export configuration property file

Note: Your STEP system must be connected to an InDesign server in order to import publication transfer packages. If your system is not connected to an InDesign server, contact Stibo Systems for assistance.

Exporting a Publication Transfer Package

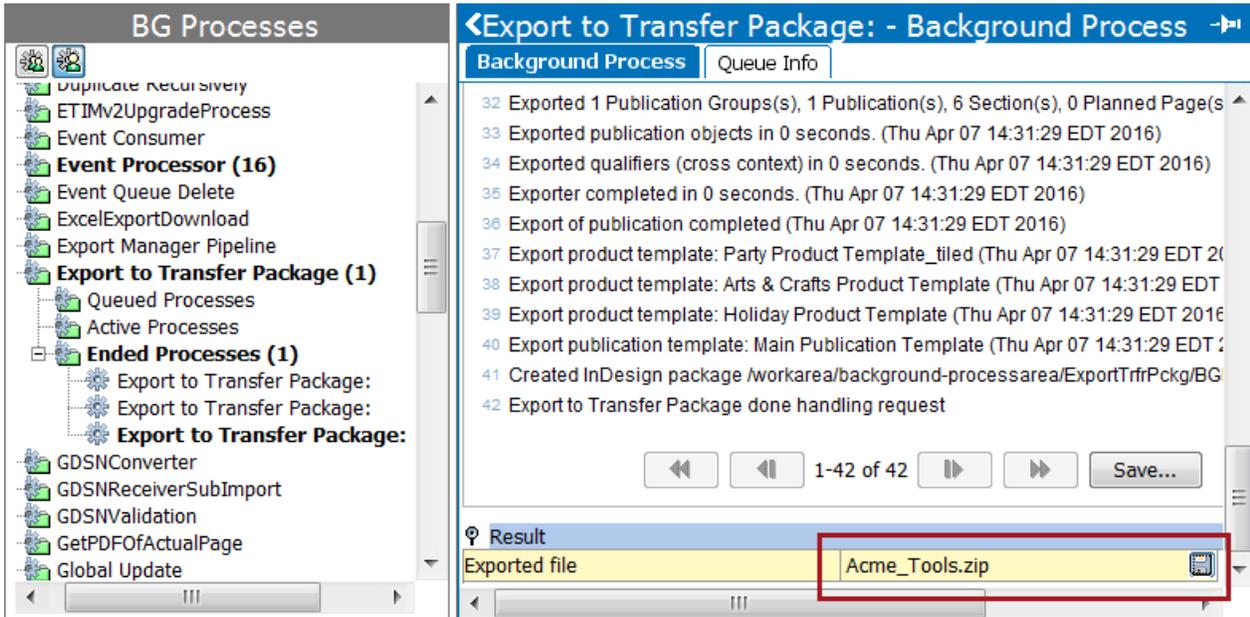
To create a transfer package for export, follow these steps:

1. In the Tree, navigate to the publication that you would like to export.
2. Right-click on the publication and select **Export to Transfer Package**.



3. A background process starts and the 'Starting process Export to Transfer Package' dialog displays. Click **Go to process** in order to view the background process on the BGProcesses tab.

- When the export process is complete, click on the file icon (located at the bottom right corner of the **Background Processes** tab screen), then save the .ZIP file to a location on your computer.



- There is no need to extract the contents of the .ZIP file, as the .ZIP file itself is the transfer package that will be used to import the publication and templates into STEP. The folders contained in the .ZIP file are as follows:

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

- pageTemplates:** Contains all page templates associated with the publication and an XML file (TemplateNameIDMapping.xml) that maps the file names of the templates to their corresponding STEP IDs. The pageTemplates folder is always included but will only contain content when a Flatplanner publication is exported.

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

- **productTemplates:** Contains all product templates associated with the publication plus an XML file (TemplateNameIDMapping.xml) that maps the file names of the templates to their corresponding STEP IDs.

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

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

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

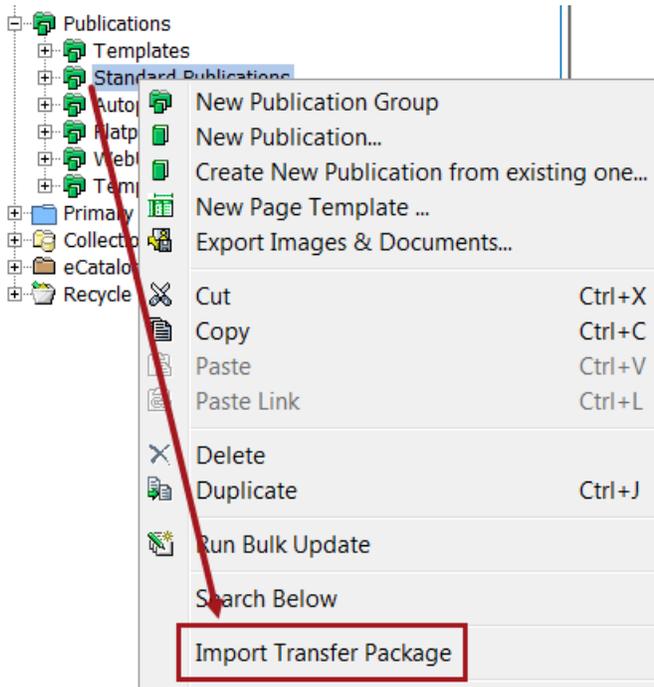
- **publicationTemplate:** Contains the publication template associated with the publication plus an XML file (TemplateNameIDMapping.xml) that maps the file name of the template to its corresponding STEP ID.

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

Importing a Publication Transfer Package

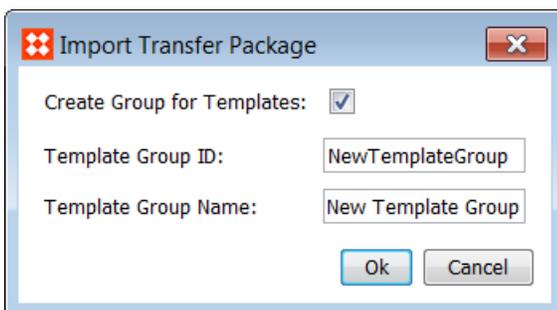
To import a publication transfer package, follow these steps:

1. In the Tree, navigate to the publication group into which you would like to import the transfer package.
2. Right-click on the publication group and select **Import Transfer Package**.



3. The 'Select Zip File' dialog displays. Navigate to the publication transfer package .ZIP file that you would like to import, then click **Open**.
4. In the 'Import Transfer Package' dialog that displays, check the **Create Group for Templates** box if you would like to create a new publication group to house the templates contained within the transfer package. This new group will be created inside of the publication group that you have selected.

Enter an ID and a name for the new publication group, then click **Ok**. If you leave the box unchecked, then the templates will be imported directly into the publication group that you have selected.



5. A background process starts and the 'Starting process Import Transfer Package' dialog displays. Click **Go to process** to view the background process on the BGProcesses tab.

- When the background process completes, the publication and its associated templates are now created on the destination system. If you checked the **Create Group for Templates** box in step 4, this new publication group is also created.

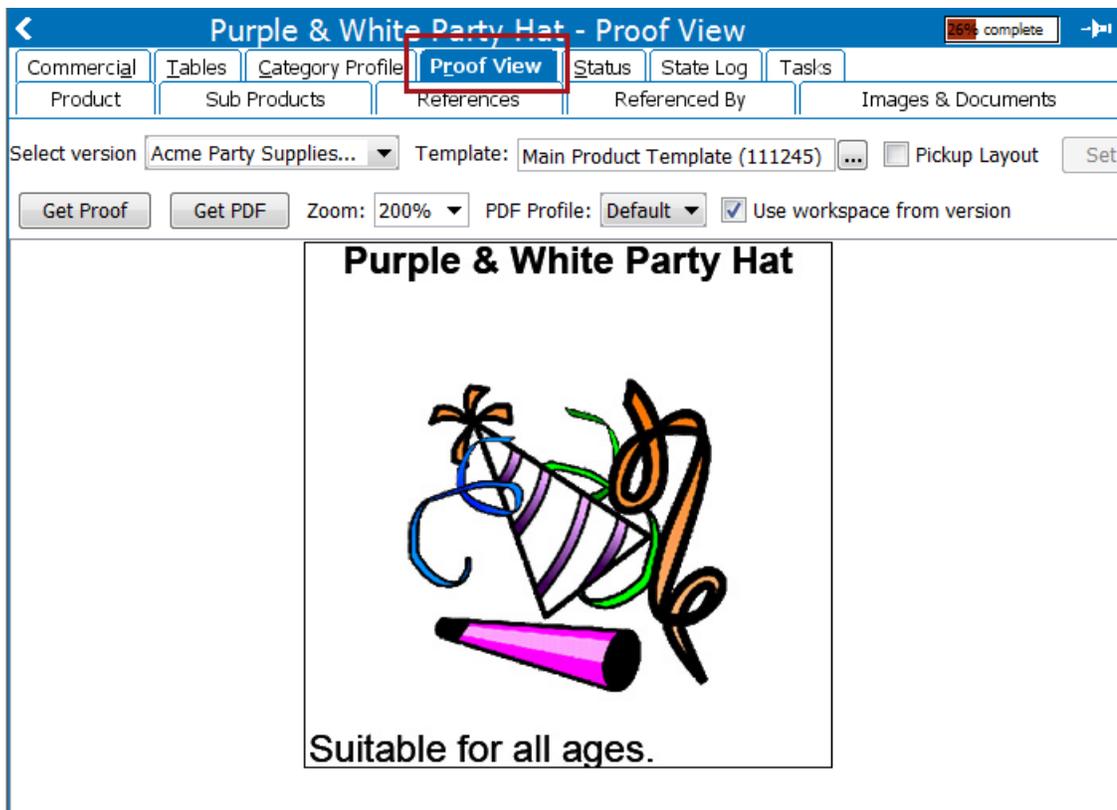
Note: If the Publication Excel / Publication STEPXML files in your transfer package contain the IDs of products, classifications, or assets that do not exist on the destination system, these objects will **not** be created in the destination system.

Generating Proof Views

Proof views can be generated for a single page or single spread in the STEP Workbench using the **Proof View** tab on **product** objects (blue Primary Product Hierarchy nodes). Proof views display a close representation of how a product will look when mounted onto a page.

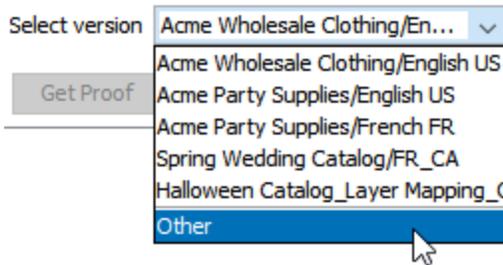
Note: An InDesign server must be connected to your STEP system to enable proof view functionality, as it is the InDesign server that generates proofs. For more information on the deployment of an InDesign server, contact Stibo Systems.

Proof views are also available from the Web UI, but this topic only explains how to access proof views in the workbench. See the **Proof View** topic in the **Web User Interfaces** documentation for more information.

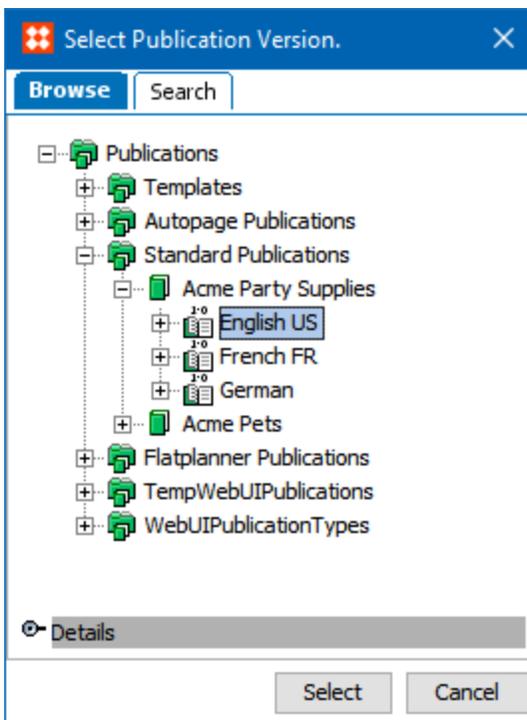


To generate a proof view in the workbench:

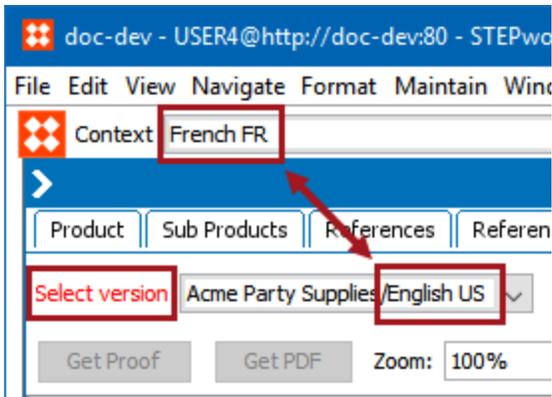
1. In the **Tree**, navigate to the product object that you would like to preview, then click on the **Proof View** tab.
2. In the **Select version** dropdown, choose the publication version that you would like to use to preview the product. By choosing the version, you are also selecting the publication and using its associated publication template as the backdrop of the proof view.
3. If the version you are looking for is not on the initial dropdown list, click **Other** to open the **Select Publication Version** dialog.



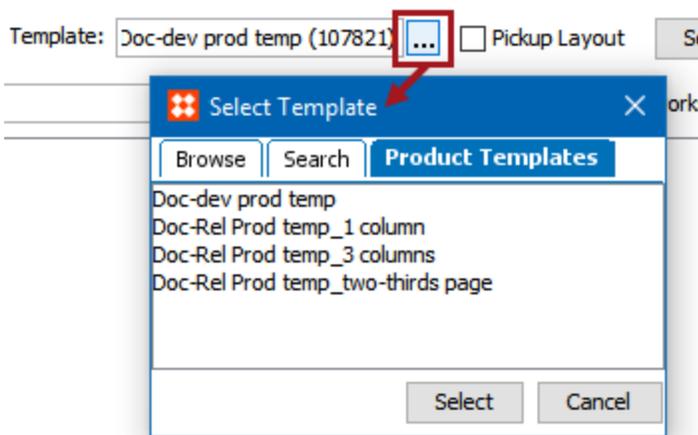
4. Browse to or search for the publication version that you would like to use, then click **Select**.



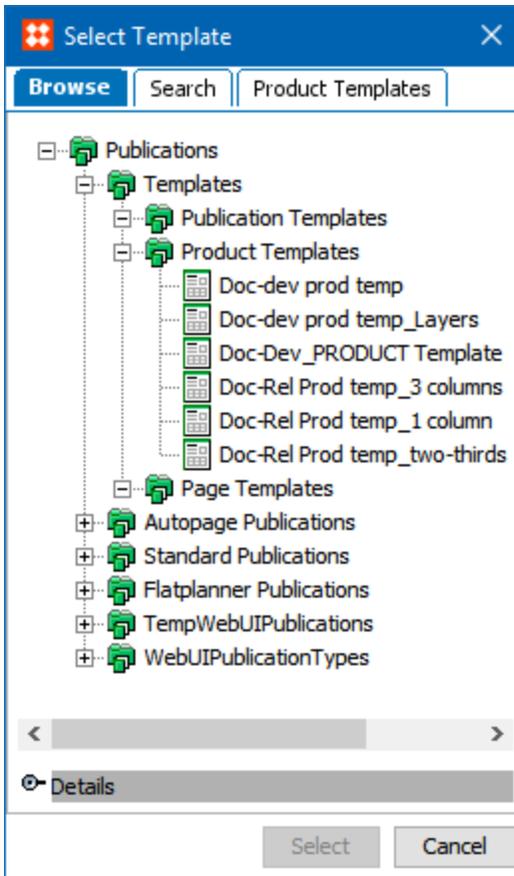
Note: If the context of the selected publication version does not match the context in which you are currently viewing the workbench, the words 'Select version' will appear in red to provide you with a visual indicator that the language displayed in the proof view will be different than that of the language displayed in the workbench.



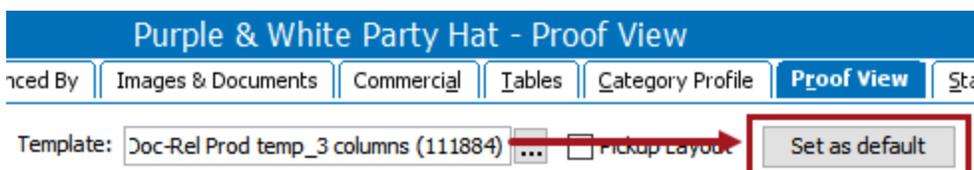
- To select the product template that you would like to use to view the product, click the ellipsis button to the right of the **Template** field. If a default product template has already been assigned to the product, it will display in this field.
- In the **Select Template** dialog that displays, there are three tabs. By default, the dialog opens on the **Product Templates** tab.



- **Product Templates:** The product templates linked to the publication you chose from the 'Select version' dialog display here. Only one can be chosen.
- **Browse:** Displays the publication hierarchy. Only product templates are available for selection.



- **Search:** Displays a field where product templates can be located through typeahead search.
7. Once you have selected a product template, you can make it the default product template for your product by clicking **Set as default**.



- To confirm that the default template selection is successful, click on the **Product** tab and check that the template displays in the **Default InDesign template** field.

Product		Sub Products
Description		
Name	> >	Value
ID		121178
Name		Purple & White Party Hat
Object Type		Item
Revision		0.5 Last edited by USER4 on Thu Jan 05 :
Approved		✘ Last Approved on Mon Jan 02 08:03:
Translation		Not Translated
Path		Primary Product Hierarchy/Products/Party
Default InDesign template		Doc-Rel Prod temp_3 columns (111884)
UPC	abc	

Note: If there is already a default product template assigned to the product, clicking **Set as default** on the Proof View tab will overwrite the previously chosen template.

- 8. If you do not want to select a product template, and instead would like to pick up a layout from a publication in which the product was previously mounted, check the **Pickup Layout** box.

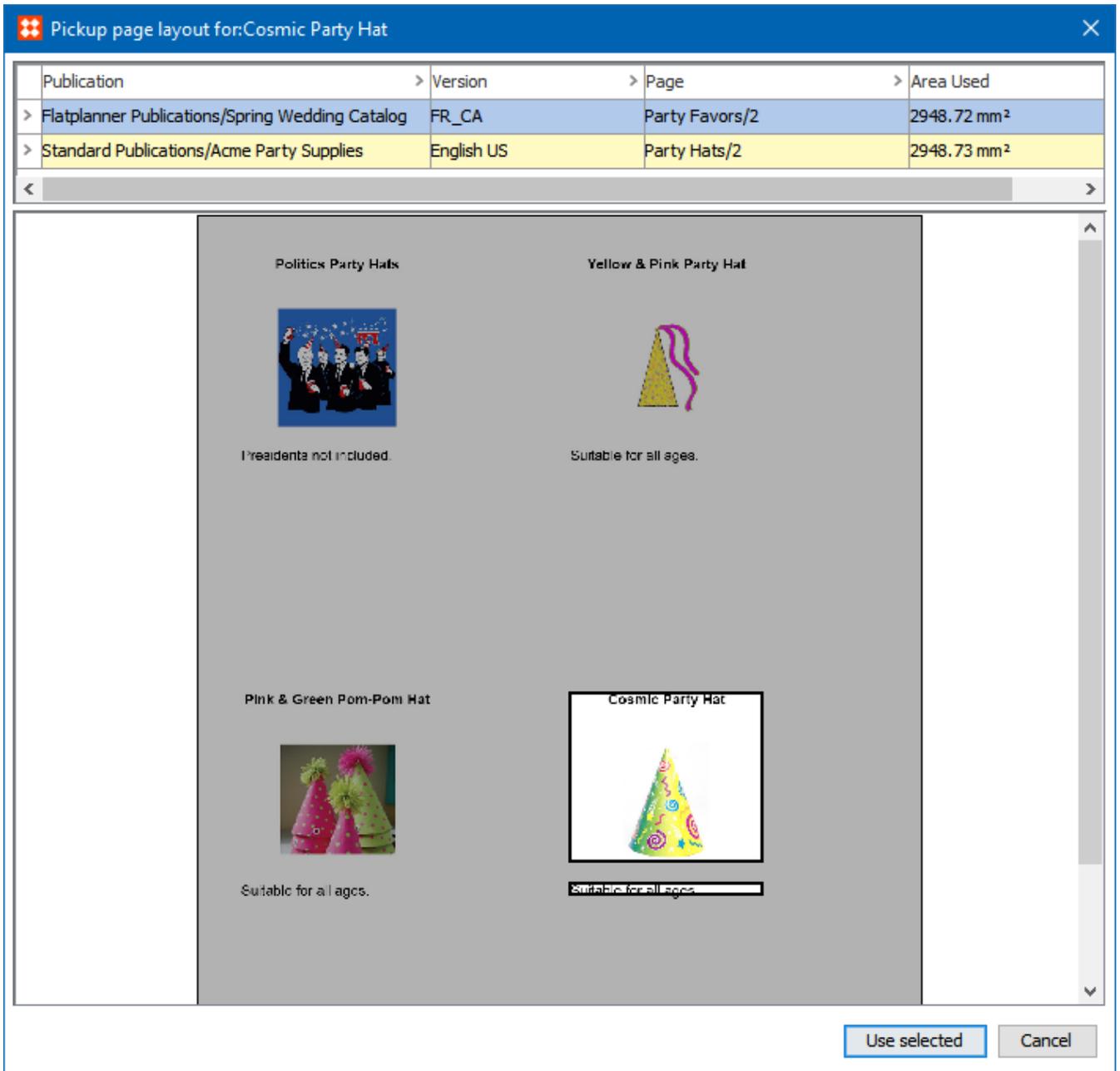
Note: The Pickup Layout option is only available for systems that use the Flatplanner component.

- When Pickup Layout is checked, the Template field is replaced with a **Pickup** field.

- Click the ellipsis button (...) to the right of the Pickup field to launch the **Pickup page layout for** dialog.

Publication	Version	Page	Area Used
> Flatplanner Publications/Spring Wedding Catalog	FR_CA	Party Favors/2	2948.72 mm ²
> Standard Publications/Acme Party Supplies	English US	Party Hats/2	2948.73 mm ²

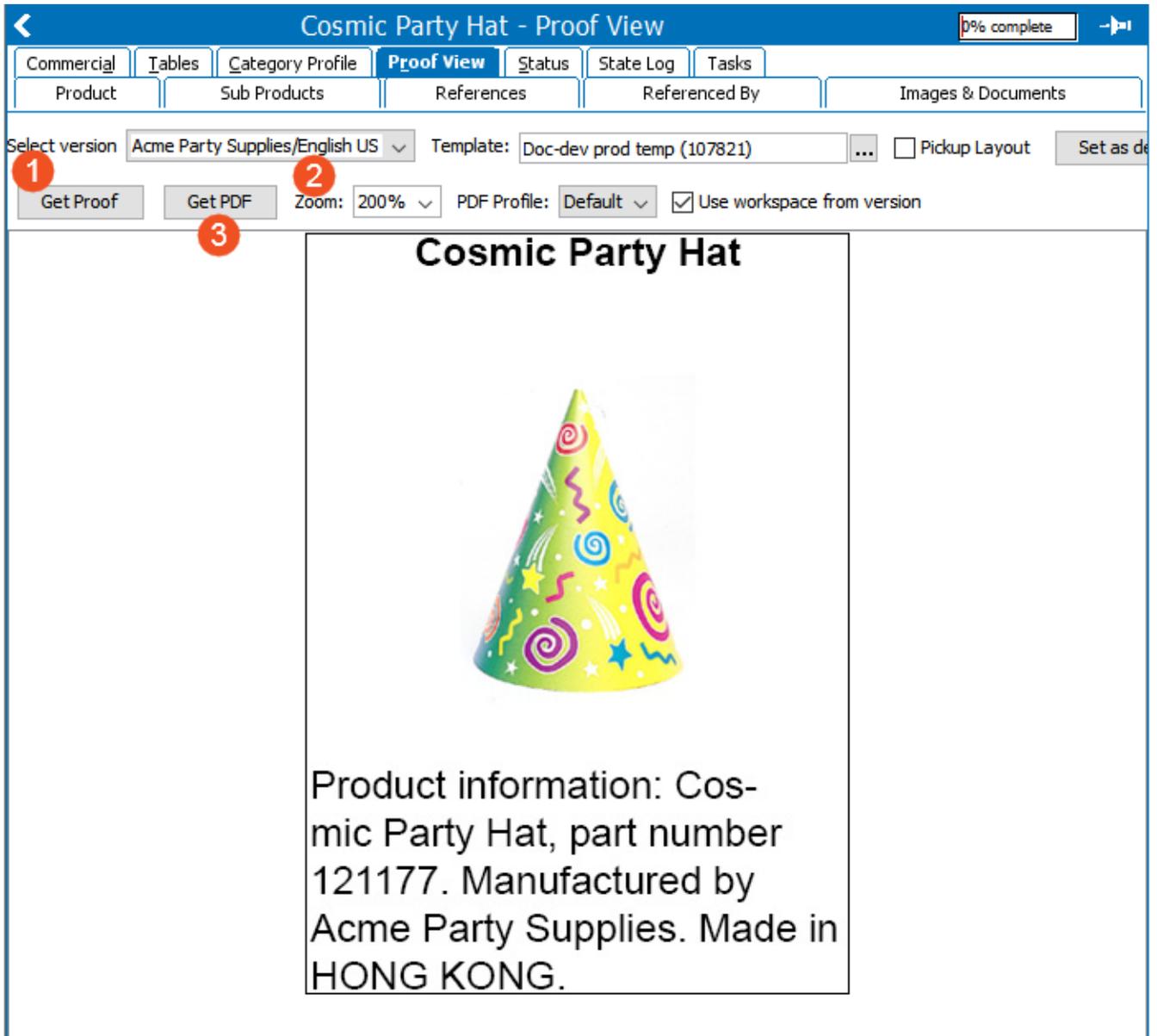
- Select the publication from which you would like to pick up your product's layout. The bottom of the dialog displays a preview of the actual page as it appears in the selected publication, with your product's layout highlighted, and the rest of the page in gray.



- Click **Use selected** to select the layout and close the dialog.
9. Click **Evaluate Pagination Rules** to evaluate pagination rules that will affect the layout. This feature is most commonly used for AutoPage publications. When a pagination rule exists in the publication that you are using

to view the proof, you can use this option to ensure that the pagination rule is causing the product to display correctly.

10. Click **Get Proof** to fetch the proof view from the InDesign server.
11. Click **Zoom** to zoom in or out of the proof. Zoom ranges from 25% to 200%. Alternately, you can zoom in and out by using the scroll wheel on your mouse.
12. Click **Get PDF** to have STEP automatically generate a PDF of the proof view. This is considered a *foreground task* of the InDesign server, as a background process is not kicked off. The PDF will automatically display in the default PDF application once generated.



13. In the **PDF Profile** dropdown, the default selection is **Default**.

Note: PDF profiles are system dependent. Therefore, the PDF profile is set to Default if no special PDF profiles have been configured for the system.

14. Check **Use workspace from version** to view the proof using the workspace from the publication version, which will be either Main or Approved. This option exists because proof views automatically display using the workspace that you are currently using in the workbench, *not* the workspace attached to the publication version.

Considerations for Proof Views

- For users who only use 'drag-and-drop' functionality to build InDesign pages, a 'dummy' publication template may be linked to a publication in STEP instead of the actual 'mounting page.' This 'dummy' template (which may be a blank page with no graphical elements) can be used solely to generate proof views in the workbench, while actual pages are built in the InDesign client by dragging and dropping products onto the more fully developed mounting page.
- The same fonts used in your publication and product templates must be installed on your InDesign server in order for the pages to render accurately. If the fonts are not available, then a generic font (such as Minion Pro) will be used for the rendering.
- If your system does not return proof views, one or more of the following issues could be the cause:
 - You may not be connected to an InDesign server
 - Your InDesign server may be offline, or one or more renderers on your InDesign server may be offline
 - The InDesign templates stored on your STEP server were created with a higher version of InDesign than that of your InDesign server. For example, if you are using templates that were created using a CC version of InDesign but your InDesign server is running on CS6, then proof views will not be fetched because the server cannot open the templates.

See the **InDesign Queues** topic for more information on monitoring and troubleshooting the InDesign server.

Updating Documents From InDesign

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

STEP'n'design supports three ways of updating documents from within InDesign:

- Checking the STEP database for updates
- Selectively choosing which data structure to update
- Direct update, where specific elements on the page are chosen for updates

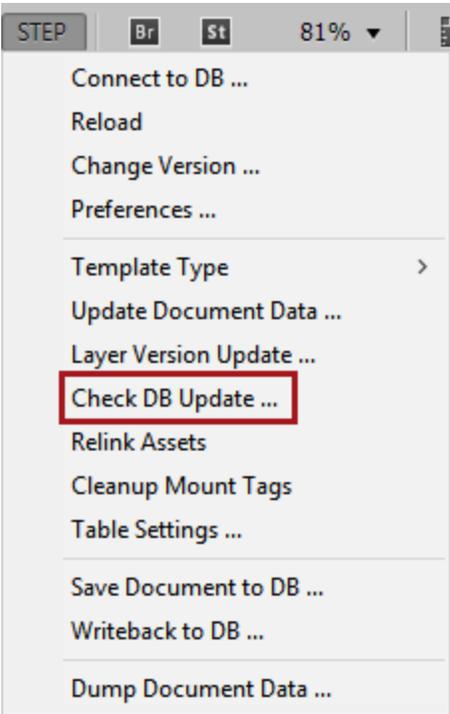
This section describes how to check the content of the document against the corresponding content in STEP—from within InDesign—and how to update previously created pages with the latest changes from STEP.

For information on how to update documents from within the workbench without going into InDesign, see **Updating Documents From the Workbench**. Note that you must have an Adobe InDesign server (IDS) set up and integrated with your STEP application server in order to update documents from within the workbench. If you do not have an IDS, you must update all documents from within InDesign, by the methods detailed within this topic.

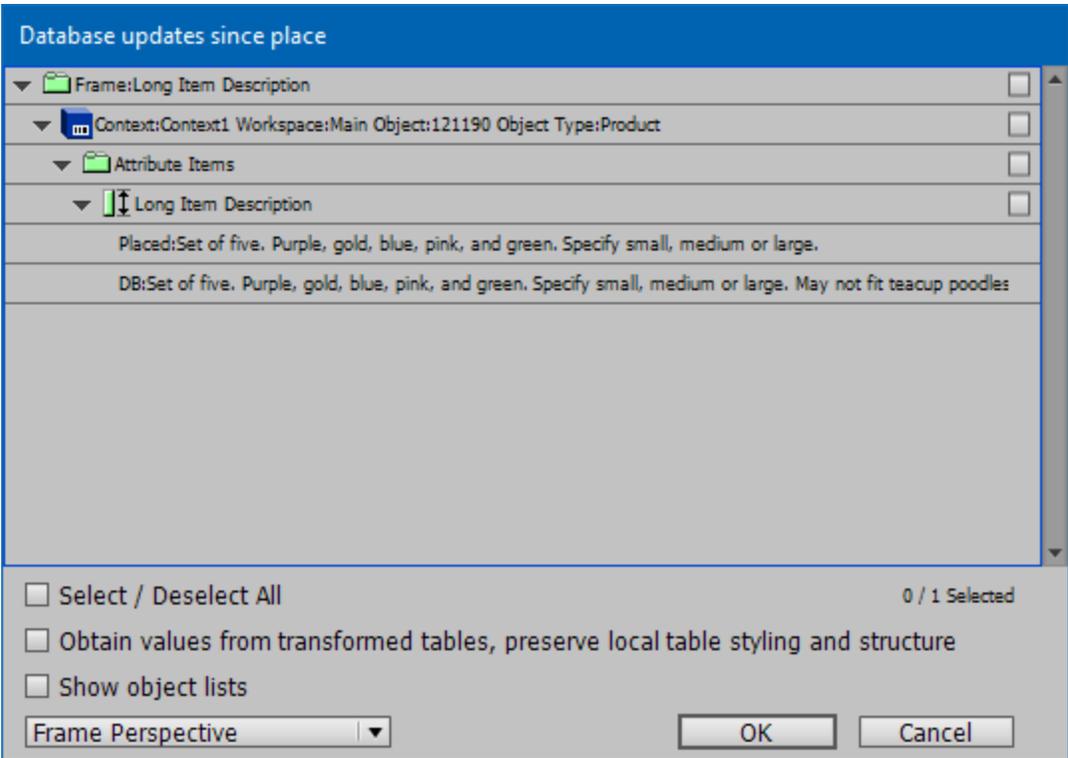
Checking Database Update

Because pages can be built before product data is complete or approved, it is possible, and often necessary, to check the database for updates and update the InDesign pages accordingly throughout the publication production cycle.

1. Open the page that you would like to update, then navigate to STEP > **Check DB Update**



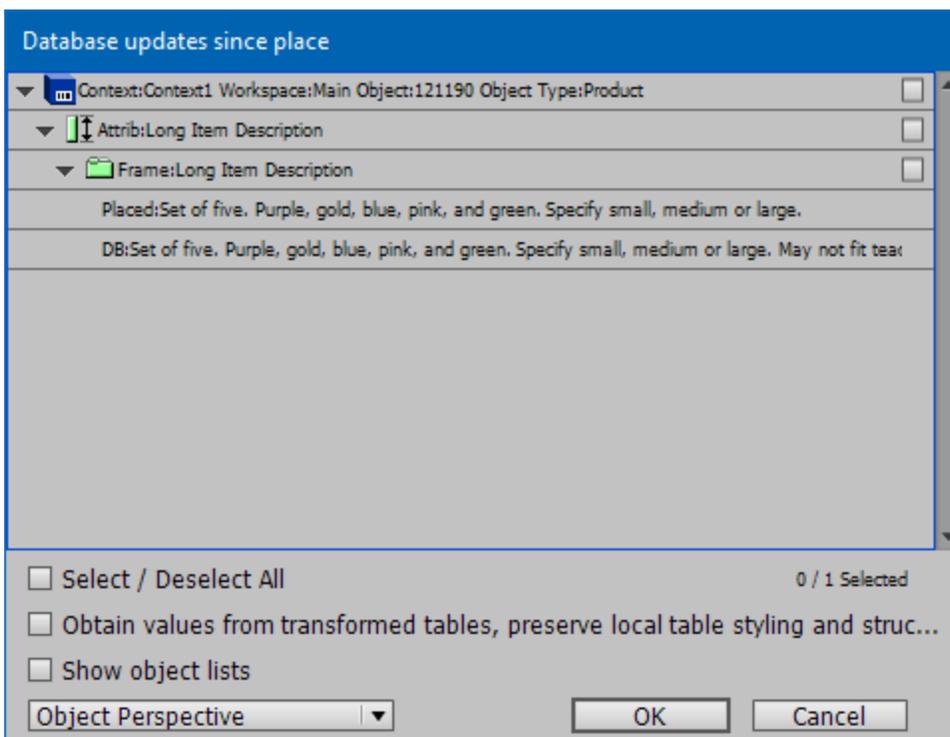
- 1. The **Database updates since place** dialog displays. This dialog shows a list of elements placed on the page (such as attributes) where the content no longer matches what is currently in STEP.



2. Check the relevant boxes on the right side of the dialog to make updates to specific content only. Checking the parent-level change will automatically select everything underneath. To select all boxes at once, check the **Select / Deselect All** checkbox.
3. If a table is chosen for update, check the **Obtain values from transformed tables, preserve local table styling and structure** box in order to retain the existing table structure and only update the values. For example, local styling might have been applied to the table on the InDesign page after its original mount, such as the alteration of row / column sizes or the addition of color shading (either manually or through a previous table transformation). Checking this box ensures that the table structure and formatting remain as-is and only the values are updated. If the box is not checked, the entire table is re-sent from the database (force updated) and any local updates made to the table are lost.

There are two methods to avoid remounting entire tables. An alternate way of updating a table is to update only the attributes within the table using the **Update Document Data** feature. This feature is detailed in the next section. Also, users may perform a direct data update on the table, which is detailed in the 'Direct Data Update' section.

4. From the dropdown list in the lower left corner, select **Frame Perspective** or **Object Perspective** to change how the list of update candidates is displayed. The previous screenshot in this topic shows how potential DB updates look in the Frame Perspective, which identifies the frame(s) on the InDesign page that contain out-of-date content. The Object Perspective view lists the changes by object, as pictured in the following screenshot.



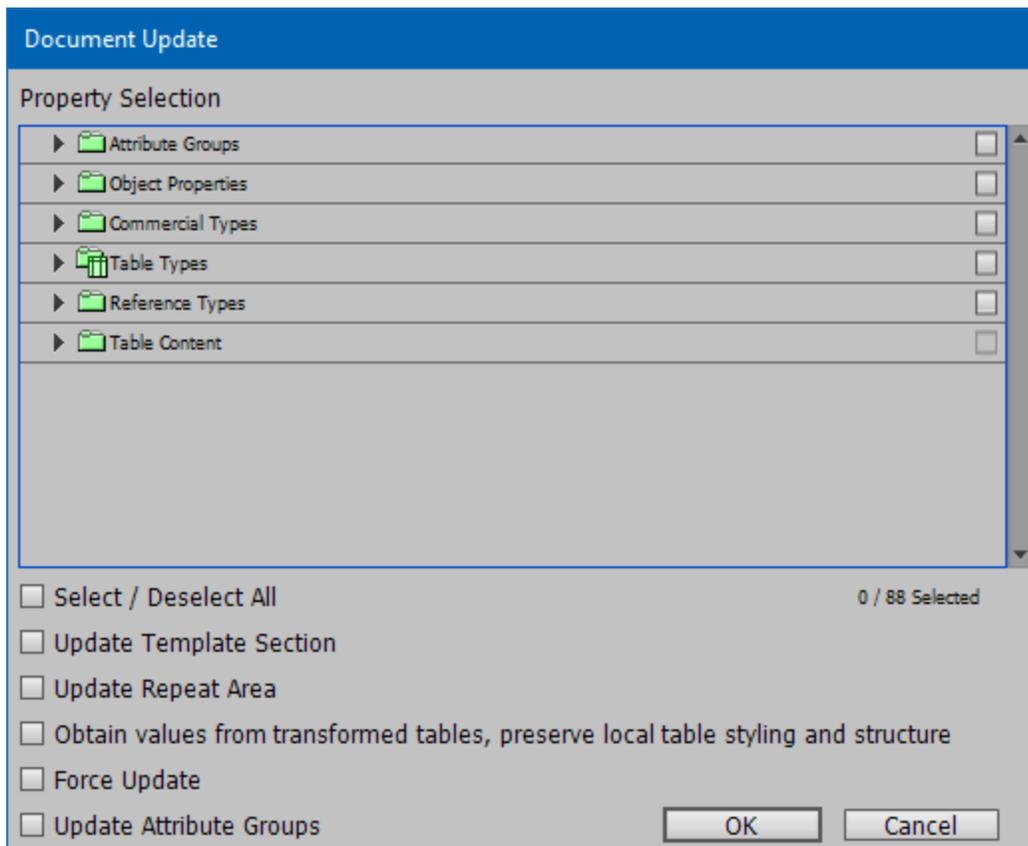
5. Select the **Show Object lists** check box to split the dialog box into two areas, with the lower area showing object lists. If repeated areas or template sections have a different object list, then items are shown in the object list.

6. Click **OK** to start the update process, or **Cancel** to exit the dialog.

Updating by Type

You can selectively choose which elements on the page to update if you know that a certain category of data (such as image references, attributes, or tables) have been changed in STEP and you want to update your page to reflect those changes only. You can update either a small set of data, such as one individual attribute, or you can update an entire group of attributes, images, tables, and so forth. A common use of this feature is to perform a traditional price merge, where all price attributes and/or commercial terms lists must be updated.

1. With the relevant InDesign page opened, navigate to STEP > **Update Document Data** The **Document Update** dialog displays.



2. Check the relevant boxes on the right side of the dialog to make updates to specific content only. Checking the highest level will automatically select everything underneath. To select all boxes at once, check the **Select / Deselect All** box. Note that boxes will appear for all data categories whether or not they contain changed content. The Document Update feature does not run a check on the page data first to see what needs updating—the dialog simply provides a list of all data that *can* be updated.
3. Check the **Update Template Section** box to compare the list of objects applicable to a template section to the objects mounted on the page (ignoring order). Additional objects are placed at the end of the list unless deleted items are also found, in which case added items replace the deleted items until there are no more deleted items.

and the remaining items are then placed at the end of the list. When the **Force Update** checkbox is selected, the template section is removed from the page and replaced with the original gap, etc. settings, causing the objects to appear in the order of the database. This will refresh the selected sections with the current data that is in the database.

4. Check the **Update Repeat Area** box to compare the list of objects applicable to a repeat area to the objects mounted on the page (ignoring order). Additional objects are placed at the end of the list unless deleted items are also found, in which case added items replace the deleted items until there are no more deleted items and the remaining items are then placed at the end of the list. When the **Force Update** checkbox is selected, the repeat area is removed from the page and replaced with the original gap, etc. settings, causing the objects to appear in the order of the database.
5. If a table is chosen for update, check the **Obtain values from transformed tables, preserve local table styling and structure** box in order to retain the existing table structure and only update the values. For example, local styling might have been applied to the table on the InDesign page after its original mount, such as the alteration of row / column sizes or the addition of color shading (either manually or through a previous table transformation). Checking this box ensures that the table structure and formatting remain as-is and only the values are updated. If the box is not checked, the entire table is re-sent from the database (force updated) and any local updates made to the table are lost.

An alternative way to avoid entire table remounts is to not update the table at all, but to instead update only the attributes *within* the table (by checking a box for an attribute or attribute group in the Document Update dialog) or by performing a direct data update on the table (detailed later in this topic in the 'Direct Data Update' section).

6. Check the **Force Update** box to have all selected values re-sent from STEP and overwrite all associated local changes on the InDesign page. If not selected, the content is only updated if the current value is different to the value when it was mounted. Choosing force update will completely re-push the information from STEP, whether it is different to what is on the page or not. This option could cause a much longer update time if there is a large volume of data being updated since the system is re-pushing all data and not just data that has changed.
7. Select the **Update Attribute Groups** checkbox to update the sequence and number of visible attributes within a referenced attribute group.
8. Click **OK** to update the document to match the content in STEP. Click **Cancel** to exit the dialog.

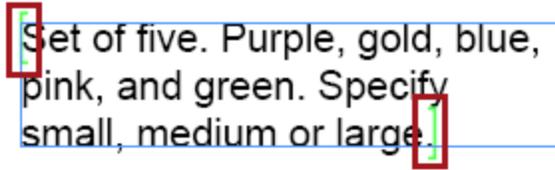
Direct Data Update

Data can be updated directly from the page—an attribute or a table at a time—using the direct data update features in STEP'n'design, which are available through right-click menu options.

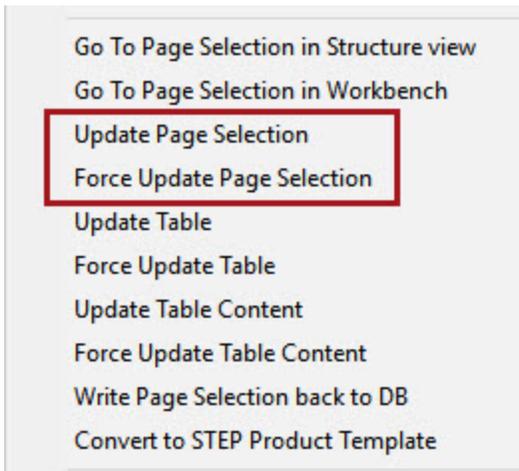
Direct Data Update of Attribute Text

Two options are available for direct data updates of attributes: **Update Page Selection** and **Force Update Page Selection**.

1. Place the cursor within the tag markers ([]) of the relevant element on the InDesign page, then right-click. (If the tag markers are not visible, click View > Structure > **Show Tag Markers**.)



2. On the popup menu that displays, the data update options appear toward the bottom. (Note that the entire popup menu is not displayed in the below screenshot.)

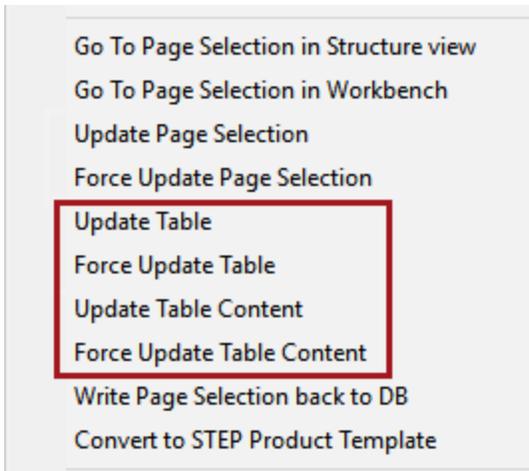


3. Choose **Update Page Section** to update the attribute value if it is different in STEP since mounted on the page.
4. Choose **Force Update Page Selection** to force the attribute value to be updated. (This will update the value whether or not it is different from what is in STEP.)

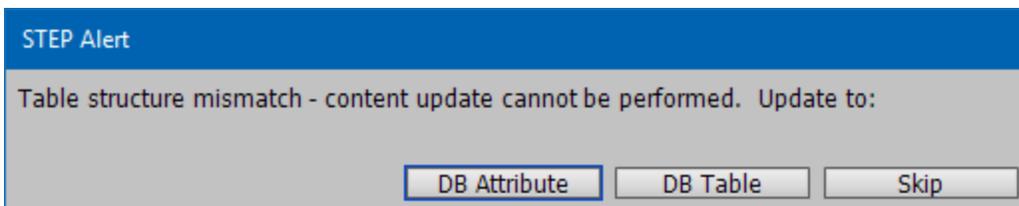
Direct Data Update in Tables

Four options are available for direct data updates of tables: **Update Table**, **Force Update Table**, **Update Table Content**, and **Force Update Table Content**.

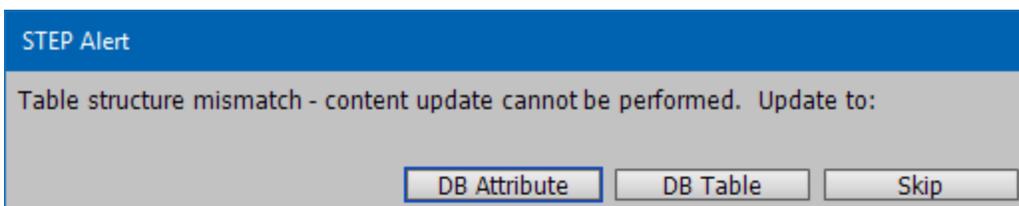
1. Place the cursor anywhere within the relevant table and right-click.
2. On the popup menu that displays, the table data update options appear toward the bottom: (Note that the entire popup menu is not displayed in the below screenshot.)



3. Choose **Update Table** to update the values within the table that have changed since the table was mounted.
4. Choose **Force Update Table** to completely remount the table, which will not only update the values within the table that have changed since the table was mounted, but will update any structural changes and remove any local formatting that was applied to the table since it was last mounted.
5. Choose **Update Table Content** to update every attribute in the table if the table structure matches. The update only takes place if the attribute value is different to that when it was mounted.
 - If both structural changes and changes to content have been made, then a **STEP Alert** dialog box appears. Otherwise, only the content is updated.



- Click **DB Attribute** to update the content of the table. To update the structural changes as well, click **DB Table**.
6. Choose **Force Update Table Content** to force update the table content with the current values from STEP. This causes all values to be overwritten whether or not they are different than the values in STEP.
 - If both structural changes and changes to content have been made, then a **STEP Alert** dialog box appears. Otherwise, only the content is updated.



- Click **DB Attribute** to force update the content of the table. To force update the structural changes as well, click **DB Table**.

Updating Documents From the Workbench

One advantage of using STEP to automate page building in InDesign is the ability to automatically update the contents of previously built pages without having to rebuild them from scratch.

When pages are built (mounted) using STEP'n'design (or an associated STEP component such as AutoPage or Flatplanner), content from STEP is placed onto the page. The placed content accurately reflects how the content existed in STEP at that moment in time. If changes are made later to the corresponding content in STEP (for example, attributes values or referenced images), the pages become out of sync with the latest content.

When this content mismatch occurs, there are several options available within STEP'n'design and STEP Workbench for updating page contents. This topic describes how to use the update options available in STEP Workbench. Methods for updating pages from within InDesign are explained in the **Updating Documents From InDesign** topic.

Additionally, this topic only describes update methods that apply across all STEP Publisher licenses. For more information on how to update pages using STEP AutoPage or STEP Flatplanner, see the following topics:

- **Updating Documents in AutoPage** in the **STEP AutoPage** documentation
- **Updating Documents in Flatplanner** in the **STEP Flatplanner** documentation

Note: Two important prerequisites must be met before actual pages can be updated from the workbench:

- The pages must be saved into a publication in STEP
- You must have an Adobe InDesign server (IDS server) set up and integrated with your STEP application server. The IDS server is what enables STEP to run bulk updates on the pages without requiring you to open the pages from an InDesign client. Contact Stibo Systems for assistance if you do not have an InDesign server.

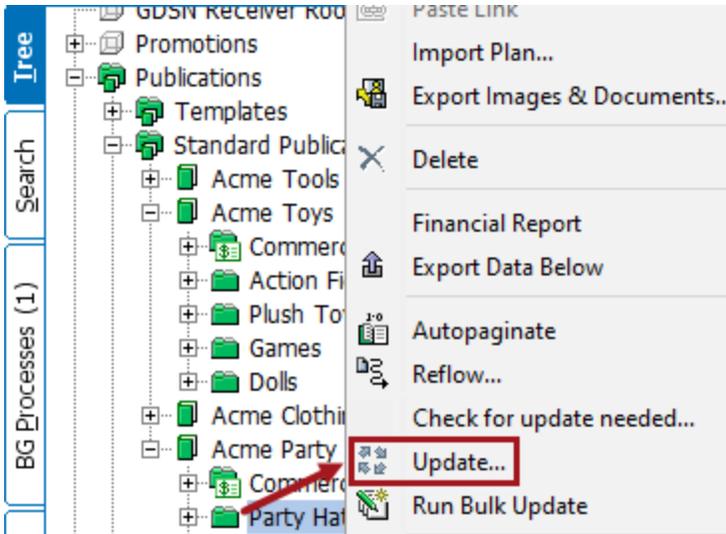
Methods for Updating Documents from the Workbench

Mounted (actual) pages saved back to STEP can be updated from the workbench by the following methods for users of any STEP Publisher license: **Update** and **Bulk Update**. Both methods work in a near-identical fashion, but **Update** is the simplest. As such, **Update** is the method detailed in this topic.

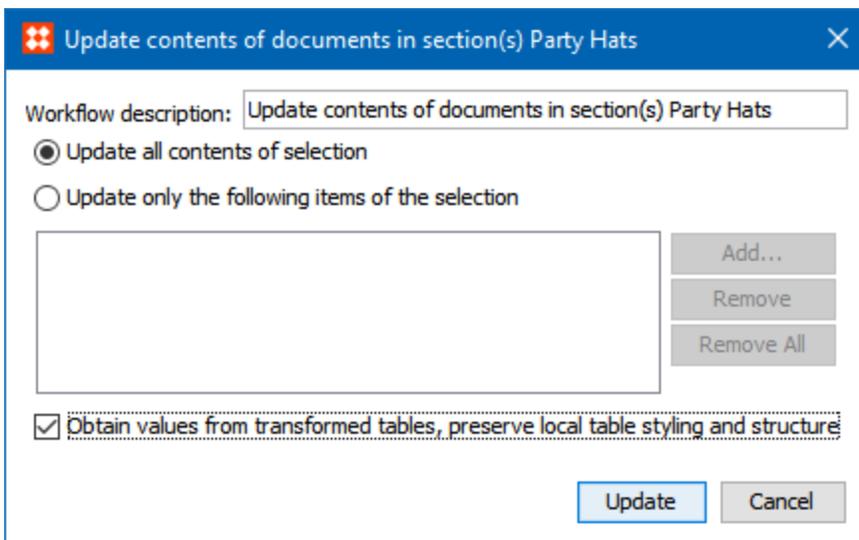
(The methods are near-identical because the same dialog detailed in the next section of this topic can be accessed from the Bulk Update wizard. For information on Bulk Update operations for STEP publication documents, see **Publishing Operations for Bulk Updates** in the **Getting Started / STEP User Guide** documentation.)

Using the 'Update' Feature to Update Documents

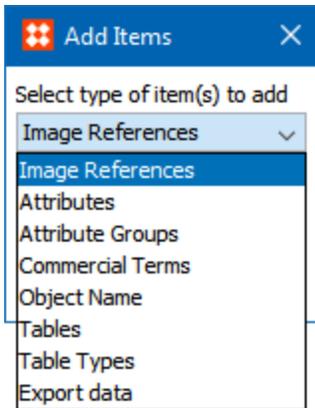
1. Navigate to the relevant publication, section, or DTP document object in the Tree, then right-click and choose **Update....**



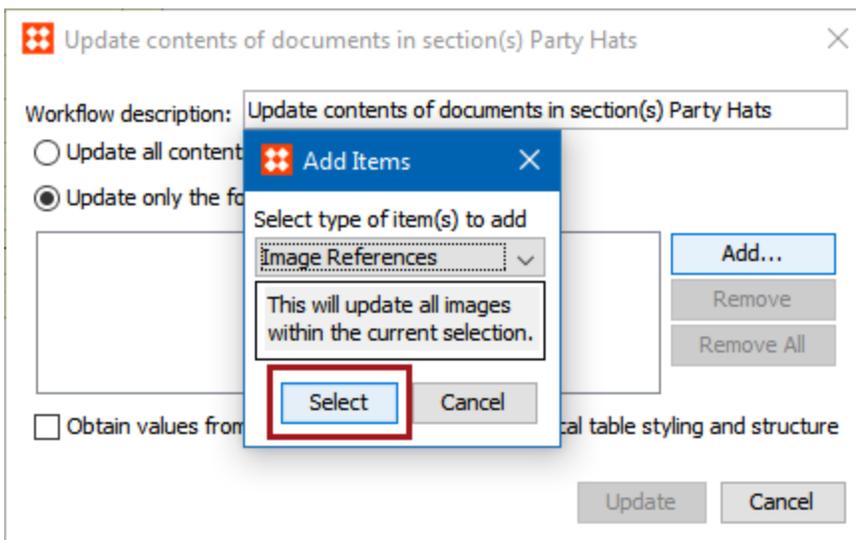
2. The 'Update contents of document(s)' dialog displays.



3. To update all contents on the pages without narrowing your selections (for example, to update all attributes, all image references, and all tables at once), select **Update all contents of selection**.
4. To narrow your selections and choose specific content areas to update, choose **Update only the following items of the selection**, then click **Add**. The **Add Items** dialog displays.



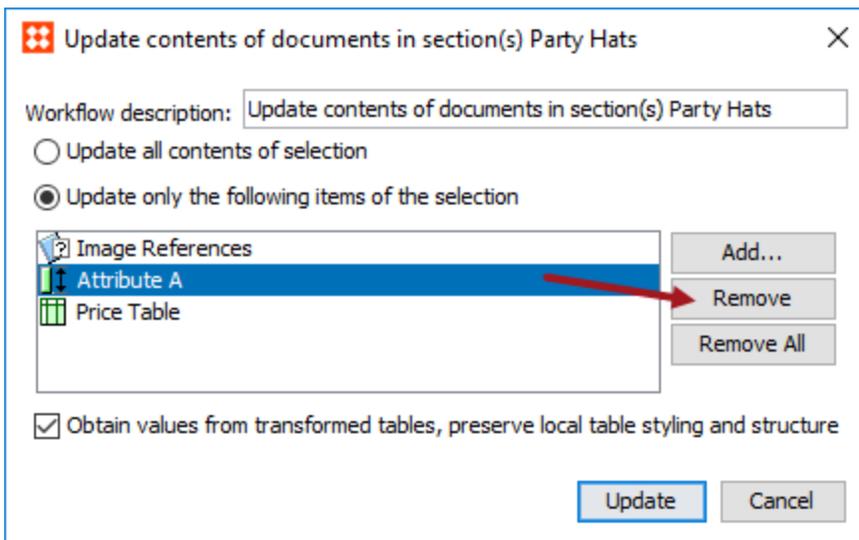
5. Eight options are available from the **Select type of item(s) to add** dropdown. Click 'Select' (pictured in the below screenshot) to add the item types to the 'Update contents' dialog. The chosen options apply to all pages in the selected publication / section / DTP document.



The options and their functionality are as follows:

- **Image References:** Updates all images. No additional options are available to narrow the selection down to specific image reference types.
- **Attributes:** This option allows you to choose specific attributes whose values should be updated. Only individual attributes can be chosen, not attribute groups. However, attributes may be multi-selected by holding Shift or Ctrl when making your selections.
- **Attribute Groups:** Updates all attributes on all pages. No additional options are available to narrow the selection down to specific attribute groups.
- **Commercial Terms:** Updates all values of the selected commercial terms lists.

- **Object Name:** Updates the STEP names of all product objects, classification objects, attributes, and publication section objects.
 - **Tables:** Updates the values contained within all STEP tables.
 - **Table Types:** Updates the values contained within all STEP tables of the selected table types.
 - **Export data:** Updates values within indexes built using AutoPage.
6. In addition to the dropdown options, a checkbox titled **Obtain values from transformed tables, preserve local table styling and structure** is available on the 'Update contents' dialog. This box is relevant for updates in which STEP tables are updated, which is when 'Update all contents of selection' is chosen or when 'Update only the following items of the selection' is chosen and either the 'Tables' or 'Table Types' option is selected from the 'Add items' dropdown.
- This box is checked by default. If left checked, only the values within the tables will update and the tables themselves will not be remounted. If the box is unchecked, not only will the values be updated, but the tables will remount and all local formatting, cell shading from table transformations, and so forth will be lost. In other words, unticking the box causes a 'force update' on the tables.
7. Once your selections have been made, click **Update** to start the update process. If you would like to remove any of your selections before updating, highlight them in the dialog window and click **Remove** (options may be multi-selected by holding Shift or Ctrl).



8. A background process is started that calls the InDesign server. The InDesign server then does the actual page update. When completed, the InDesign server saves a new version of the paginated pages to STEP.

Writing Data Back to STEP

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

As the InDesign page is not really designed as a database front end, a range of restrictions apply to the writeback function.

The restrictions are as follows:

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

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

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

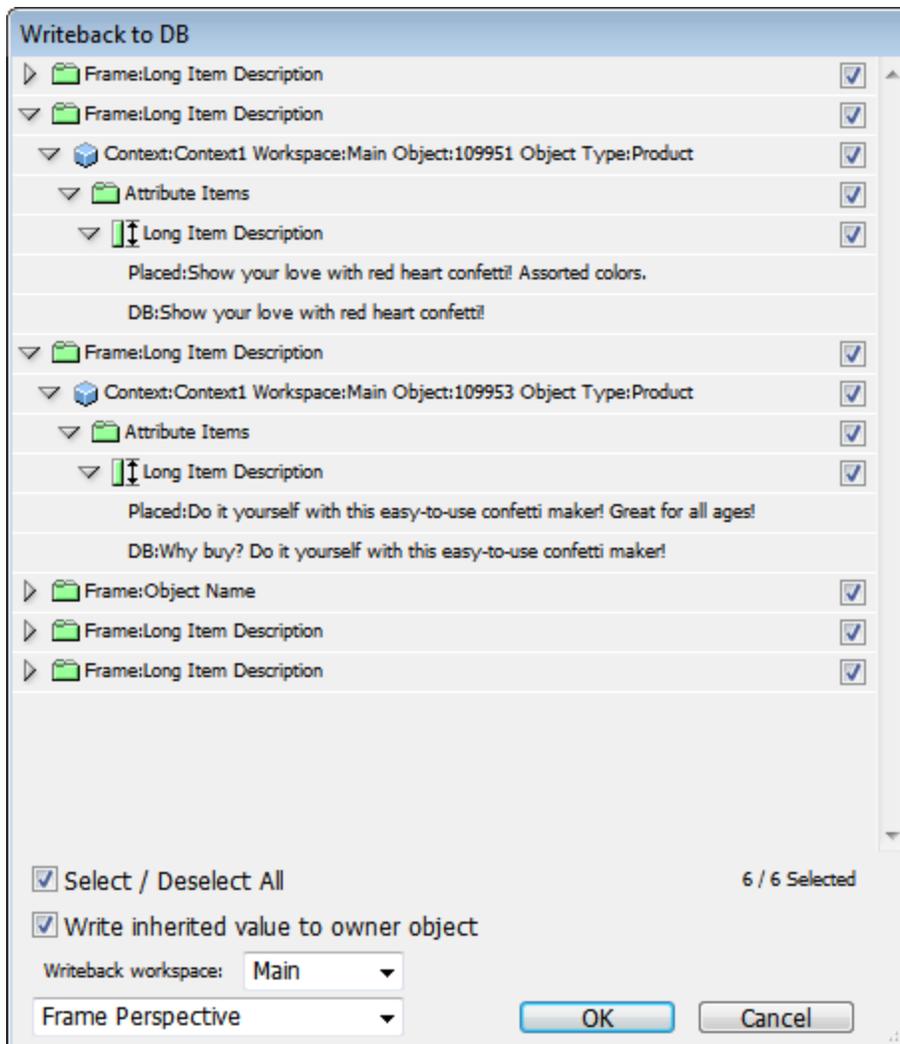
STEP'n'design supports two ways of writing data back from document to database:

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

General Data Writeback

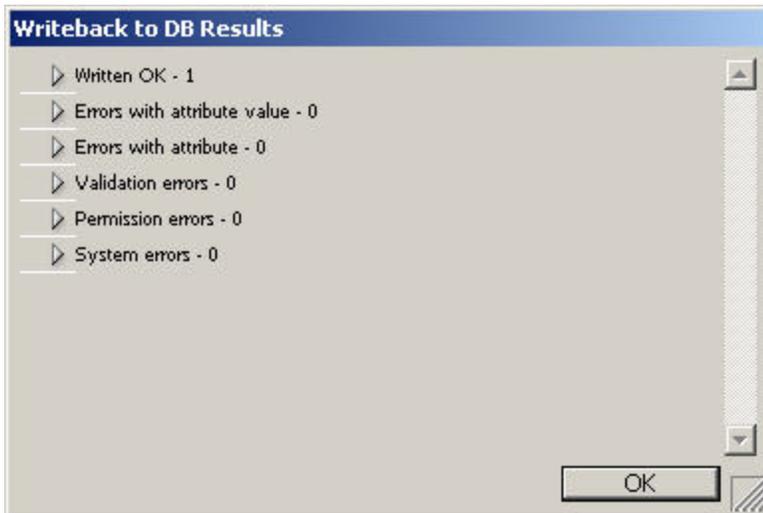
To perform a general STEP data writeback operation after you have changed some attribute text on the InDesign page:

1. In the STEP menu, click **Writeback to DB**. The **Writeback to DB** dialog box appears.



- From the list at the bottom of the dialog box, click either **Frame Perspective** or **Object Perspective** depending on how you want your changes to be presented.
- Select the relevant check boxes to the right for the data you want to write back to STEP.
- Select / deselect the **Select / Deselect All** check box if you want to allow selection / deselection of all items within the tree. The check box indicates how many items have been selected, and the total amount of items.
- Select **Write inherited value to owner object** if you are writing an attribute value back to STEP from a mounted 'child' object in InDesign. Checking this box will write the locally updated attribute value back to the owner (parent / grandparent) object.
- In the **Writeback workspace** list, click the workspace you want to write back to. The list displays all created workspaces. If not selecting a workspace, the default value is **Main**.
- Click **OK**. The contents of your attribute on the InDesign page will now be written back to STEP, provided that STEP allows it.

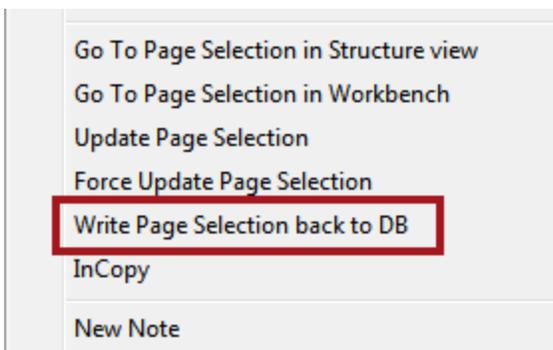
8. A **Writeback to DB Results** dialog box displays. If no errors have been encountered during the writeback process, you may click **OK** to close the window. Users who do not have privileges to make changes in STEP, such as changing attribute values, may receive errors in the **Writeback to DB Results**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



Direct Data Writeback

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

1. Place the text cursor within the item to be written back.
2. Right-click and select **Write Page Selection back to DB**, which appears near the bottom of the popup menu.

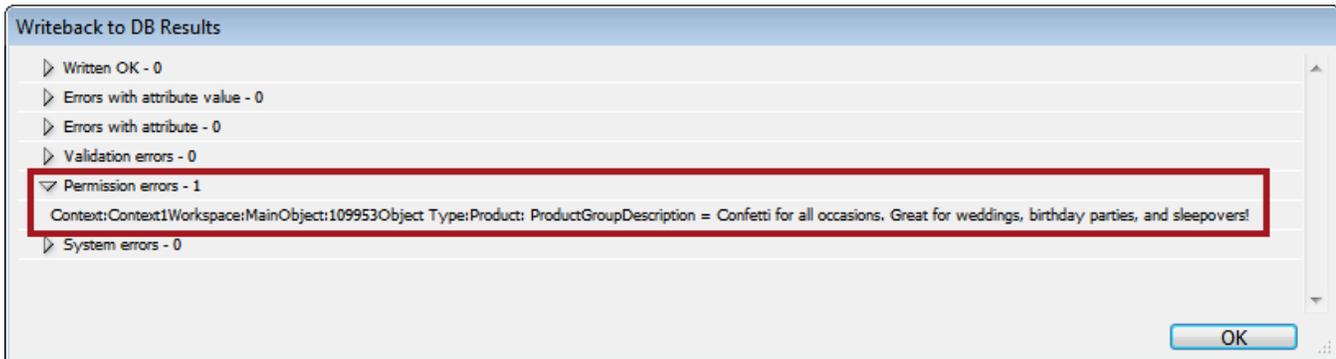


Writeback Errors for Inherited Values

If **Write inherited value to owner object** is left unchecked in the **Writeback to DB** dialog box, even users with Super User privileges—who are granted All Setup Actions and All User Actions—will receive a permission error in

the **Writeback to DB Results** dialog when attempting to locally update an inherited attribute value from within InDesign. This error occurs because inherited attribute values may not be locally overwritten from within InDesign by anyone. Inherited attribute values may only be locally overwritten in the workbench.

When this error appears, the value(s) contained in the error message have not written back to STEP at all. Thus, the only option to update an inherited attribute value from within InDesign is to write back to the owner object.



Considerations and Limitations for Writeback to Owner

- Writing a value back to an owner (parent / grandparent) object that exists in the Approved workspace will cause this object to become unapproved. Users should take care to ensure that data writeback from InDesign does not impact other processes (such as Outbound Integration Endpoints) that rely exclusively on products in the Approved workspace.
- A dialog containing the **Write inherited value to owner object** checkbox will not appear when writing data back to STEP using the **Write Page Selection back to DB** option. Users will only receive the **Writeback to DB Results** dialog, containing the Permission error(s).
- The **Permission errors** warning is not associated with user privileges as defined under **Users & Groups** in System Setup. 'Permissions' here refers to core functionality of STEP'n'design itself, in which no users have the authority to overwrite inherited values from within InDesign.

Linking to an Asset Location

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

Preferences

Multi-place Gap Multi-drop commit

Structure Tree view options

Show all Attributes in Tree

Show Tables in Tree

Show Asset References in Tree

Show ID after name

Place in Galley

Place in Free Space

Fit Calculated Table Width to Frame Width

Process Folder ...

Template Path ...

Template Cache size

Server presentation

Use default asset path

Asset Location ...

Note Layer

Note Colour

Don't mount Done Notes

Prompt for Version

Auto Show Version Update Auto save before save to DB

SOAP Timeout cURL Timeout

In many scenarios, the images on the InDesign server are pushed again from the InDesign server to a local file location using a third-party file synchronization application such as rsync. But, even when using such an application, the file path placed into the Asset Location field in STEP Preferences must be an exact match to the file path of the image location on the InDesign server. This ensures that the image links remain unbroken between the mounted pages, the InDesign server, and STEP. (If these links become broken, they can be fixed using the asset relink features of STEP'n'design. See the next topic in this documentation, **Relinking Assets in STEP'n'design**, for information on how to repair broken image links.)

Assumptions

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

- How to configure Asset Push event queues. For information on Asset Push, see the **Asset Push Overview** section of the **Exporting Data and Images / STEP Asset Push User Guide** documentation.
- How to set up an InDesign server. For more information, contact Stibo Systems.
- How to remotely connect to an InDesign server. The method of connection will vary depending on your operating system and server setup. For more information, contact Stibo Systems.

- Alternate ('non-standard') setups for connecting to an asset location, such as connecting to an external image storage platform such as Scene7. For information on non-standard setups, contact Stibo Systems.
- How to share folders and map network drives. As these processes are standard Windows and Mac functionality, they are outside the scope of this documentation.

About the InDesign Server

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

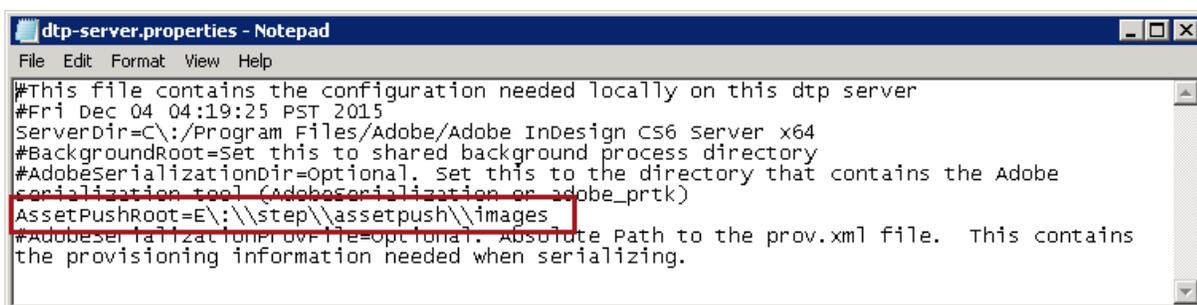
- Proof View
- Creating documents via AutoPage
- Flatplanner planned page previews
- Creating documents from a Flatplan via a Flatplanner workflow
- Generating PDFs from documents in STEP
- Including actual pages when duplicating publications
- Import of Publication Transfer Packages
- Document-Asset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

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

How the InDesign Server Locates an Image

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

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



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

← Streamers - Blue & Orange rev.1.1 - Images & Docu...

Images & Documents | References | Referenced By | Status | State Log | Tasks

Description

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



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

System Setup

- Object Types & Structures
- Tags
- Units
- Users & Groups
- Reference Types
- Workspaces
- Table
- Keys
- Event Queues
 - Asset Push 1 Queue
 - Asset Push 2
 - DTP Queue
 - raw-approved
 - raw-main
- Component Models

← raw-approved - Asset Push Configuration

Asset Push Configuration | Asset Push Configuration Statistics | Log

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

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

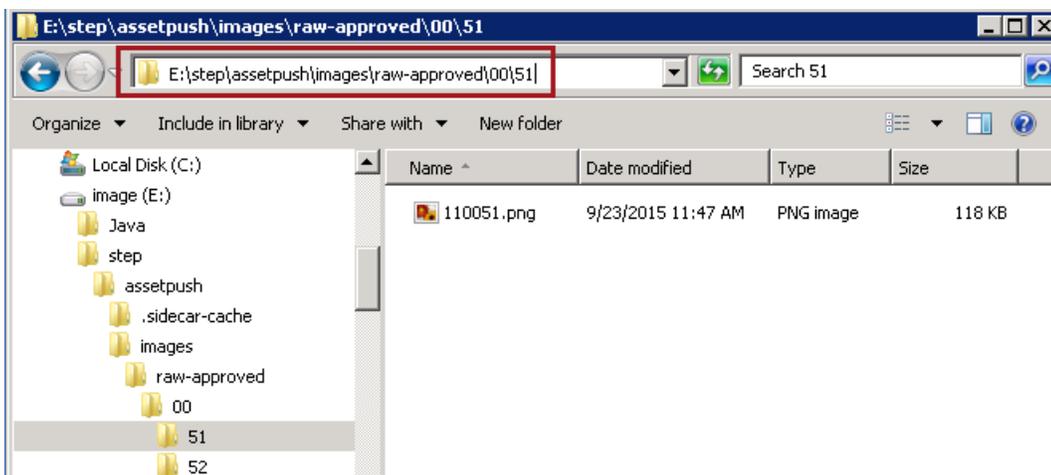
Note: It is possible to configure these entries to pull images from a different workspace than the publication version that you are working in. For example, if you need to pull textual content from the Approved workspace but images from the Main workspace, then raw-main would be mapped to AssetPush.DTPConfiguration.Approved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

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

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

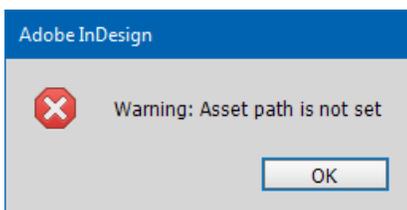
Streamers - Blue & Orange rev.1.1 - Status						
Images & Documents		References	Referenced By	Status	State Log	Tasks
Asset Push Status						
Configuration >	Asset Push Status >	Relative Path >	Workspace >	Visibility >		
> raw-main	✓ Up to date	raw-main/00/51/110051.png	Main	Language R...		
> raw-approved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

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



Setting an Asset Location in InDesign

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



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

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

Determining the Asset Location

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

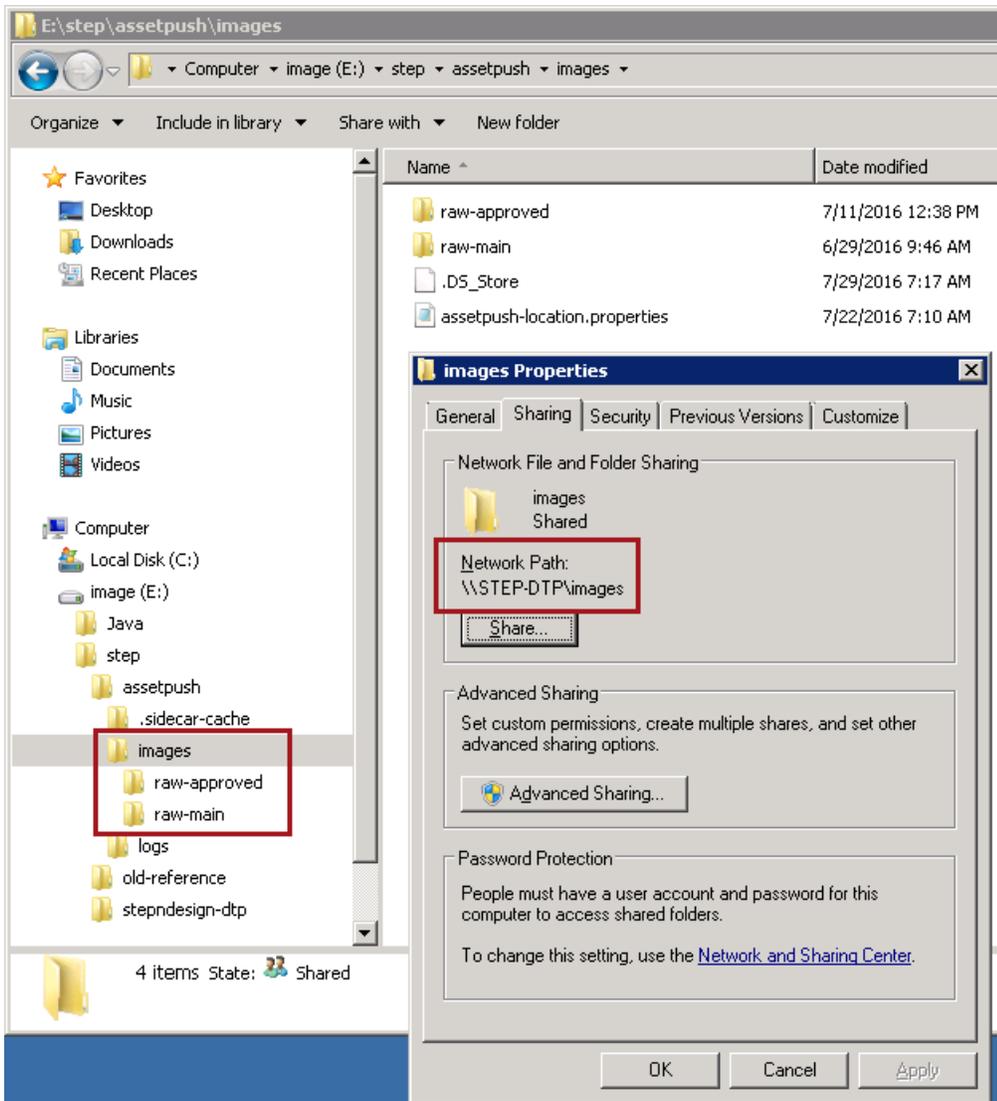
Instructions for Mac users are nearly identical to those for Windows except for Mac file path formats and specifics of how to share folders on a Mac operating system.

Shared File Location

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

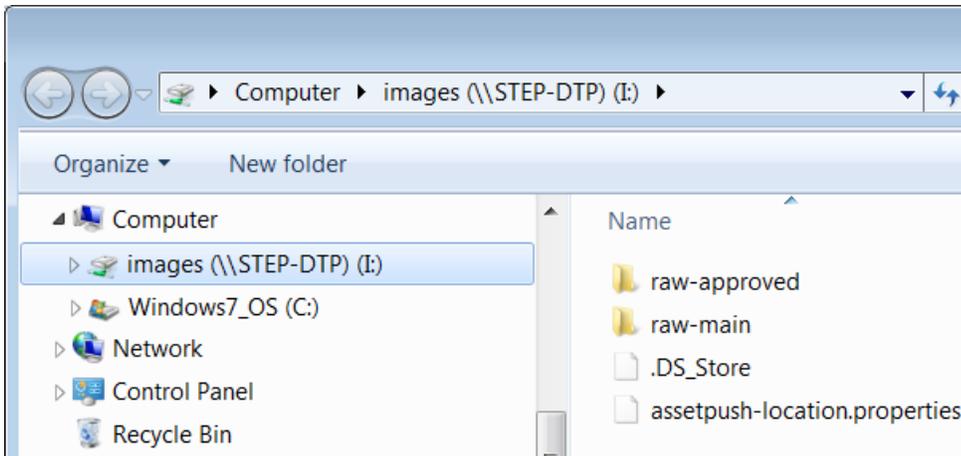
The following screenshot shows a sample 'images' folder hierarchy containing images that have been pushed from the main and approved workspaces in STEP (raw-main and raw-approved, respectively). To determine the correct path to enter into the **Asset Location** field in the STEP Preferences menu:

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



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

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



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



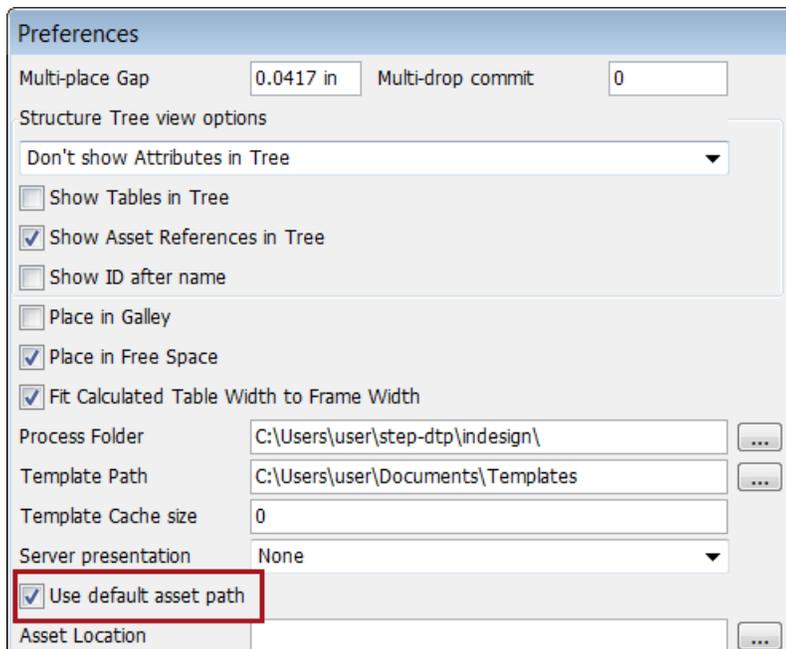
Default Asset Path

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

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

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

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



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

Relinking Assets in STEP'n'design

Two functions exist within STEP'n'design to relink broken asset links (typically *images*) on mounted pages: **Relink Assets** (which is run via the InDesign Client on an open document) and **Document-Asset Re-link** (which is launched in STEP and causes a background process to run).

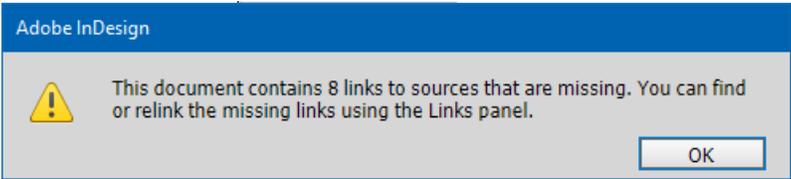
Although the standard InDesign function of relinking assets may be done via the **Links** panel, that method can be cumbersome because it requires users to manually search for or navigate to image locations. If links are broken on hundreds upon hundreds of pages, relinking assets by this method could become an extremely time-consuming task. As such, this method is not recommended.

The STEP functions of **Relink Assets** and **Document-Asset Re-link** automate this task when users are connected to a shared image location.

About Broken Links

Image links become broken when a document contains images that are no longer linked to the original location of the actual image files. Though images appear on the page, they are only screen-resolution renderings of the original files. Broken links can occur if the original file has been deleted or moved to a different folder or server after it was originally imported into the document. They can also occur if client machines are not connected to the shared image drive in exactly the same manner, or if users change the manner in which the shared drive is connected from one day to the next.

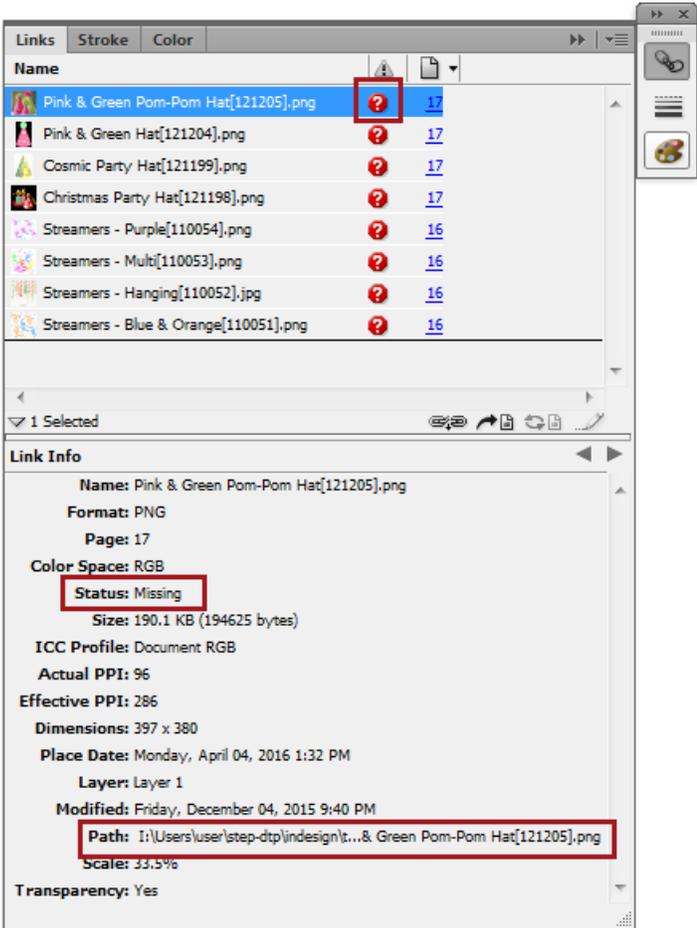
When opening a document in InDesign that contains unlinked images, the following warning dialog displays:



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



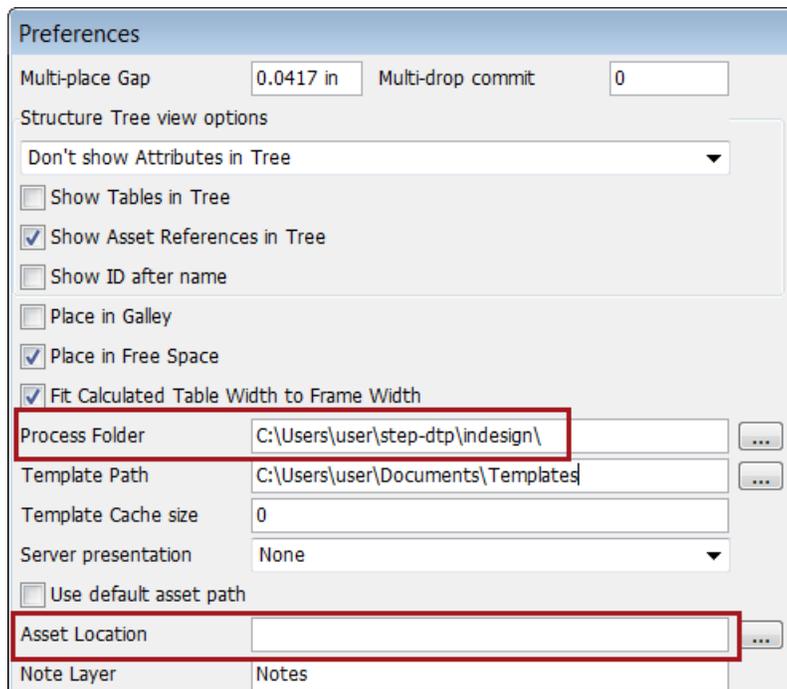
The **Links** panel displays the same red question mark for missing image links and a **Status** of 'Missing.' The displayed **Path** indicates where InDesign is expecting to find the image. This location is where the current user must be connected in order for InDesign to find the image.



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

Missing Asset Location

One cause of broken links may be if there was no **Asset Location** set in the STEP > **Preferences** menu in InDesign when the pages were originally mounted (this refers to pages generated either manually or by creating a document from a Flatplan). If no asset location is set here, images are downloaded directly from STEP into a 'tmp' folder inside the **Process Folder** (designated in the STEP Preferences menu, pictured below). Once the InDesign client is closed, the tmp folder is emptied, causing broken links.

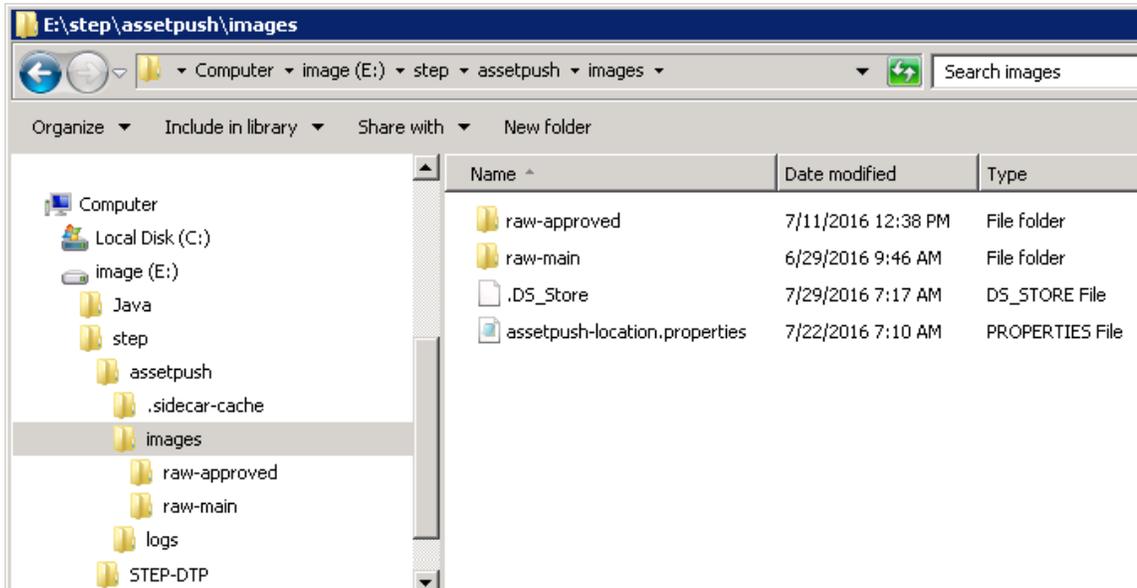


For information on how to determine what file path to place into the Asset Location field, see the **Linking to an Asset Location** documentation.

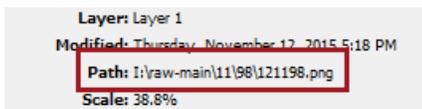
Changes to How the Shared Image Drive is Connected

The most frequent cause of missing images is when the method by which the shared drive is connected to the client or the location of the InDesign server changes.

For example, broken links can be caused if users connect too far up or too far down in the shared image folder structure. In the following screenshot, the correct image location is highlighted (the 'images' folder). A user who connects to, for example, the 'assetpush' folder or the 'raw-approved' folder will experience broken links when opening a mounted page that contains images that are linked to the correct location ('images'), which is being used by the InDesign server.



On Windows machines, the drive letter of the mapped network drive that is used to connect to the asset location can also cause broken links if other users are connecting to the asset location using a different drive letter. In the below screenshots, an Asset Location of 'I:\' is being used. The top screenshot shows how the Asset Location looks in the STEP Preferences menu. The bottom screenshot shows a sample, extended file path using the I drive. If another user is connecting to the asset location using, say, drive A, then their links will be broken when opening documents that use the 'drive I' file paths.



For information on how to connect to an Asset Location, see the [Linking to an Asset Location](#) topic.

Mixed Windows and Mac Platforms

Another—less frequent—cause of broken image links is when there is a mix of **PC** and **Mac** platforms being used in the same STEP'n'design production environment. This mix commonly involves one or both of the following:

- An InDesign server is running on a Windows platform while end users are using Mac InDesign clients
- End users themselves are working on a combination of Mac and PC InDesign clients

Even though end users are accessing images from the same shared location as the InDesign server, the differences between Mac and Windows file path formats cause broken links. For example, when an InDesign document is saved back into STEP from a Mac, InDesign saves the image path in a 'Mac-like' format, as such:

Volumes:images:raw-main:std.lang.all:44:05:4405.tif

When an InDesign document is saved back into STEP from a PC, the same image path is in a 'PC-like' format:

E:\images\raw-main\std.lang.all\44\05\4405.tif

If a Windows user opens a document that was saved back to STEP from a Mac, the images will not be found. Likewise, if a document that was saved back to STEP from a PC (or was created by a Windows InDesign server and saved to STEP) is opened from a Mac, the images will not be found.

A 'standard' installation is when clients and the InDesign server are both on the same platform (either Windows or Mac). In these cases, there is no conflict in Mac versus PC drive and path names.

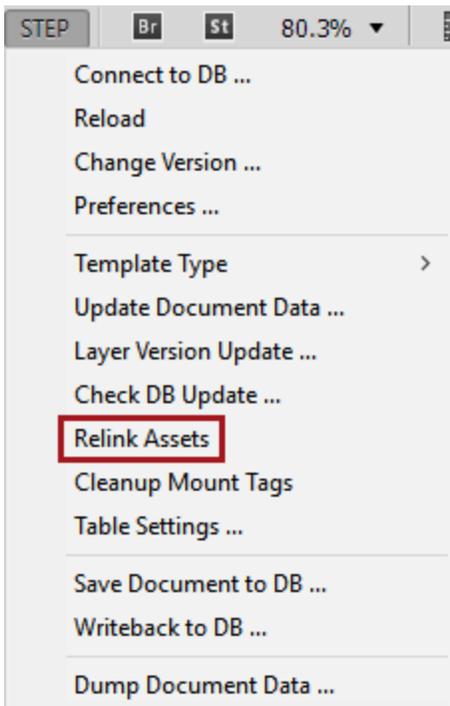
Correcting Broken Links

Relinking Assets from InDesign

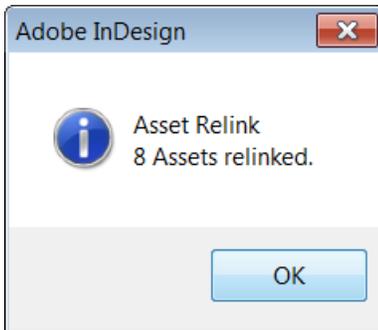
Missing assets can be relinked from within InDesign by using the **Relink Assets** function. (An InDesign server is not required to perform this action.) Provided that the Asset Location is set correctly and connection to the shared drive (asset push images folder) is established, STEP'n'design will be able to locate the images and change the path in the document so the images are no longer 'Missing' and their status in the Links panel reads 'OK.'

To relink assets on a page:

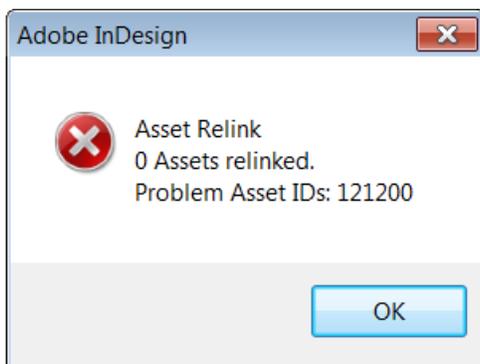
1. In InDesign, open the **STEP** menu and select **Relink Assets**.



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



If the relink fails, an error message displays to explain which images could not be relinked. 'Problem Asset IDs' may occur if an incorrect image path is specified in the Asset Location field in the STEP Preferences menu or if there is no connection to the shared image drive.



4. An unbroken link icon now appears on the relinked images, and their status shows as 'OK' in the InDesign Links panel. In addition, the updated file path is now displayed.

Relinking Assets from STEP

A **Document-Asset Re-link** operation is performed from within the STEP Workbench and requires an InDesign server.

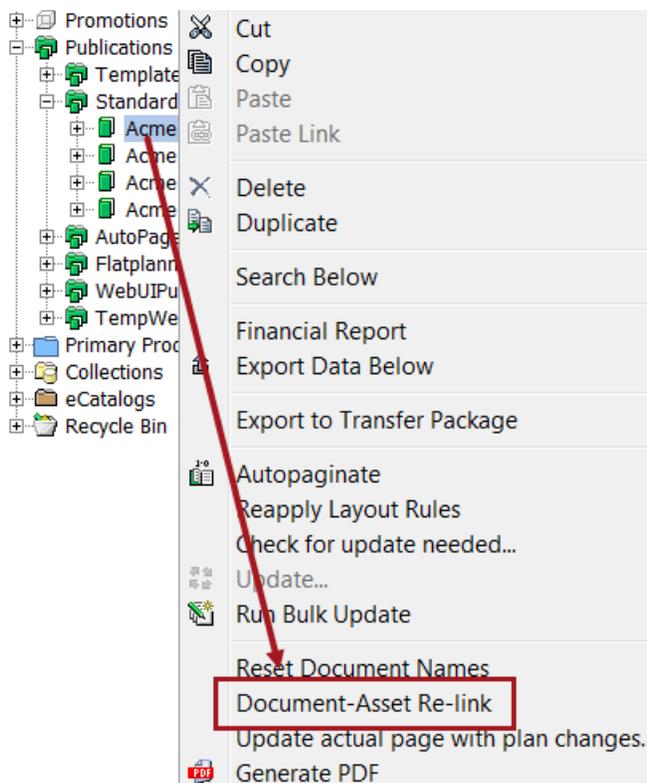
Document Asset Re-link enables a one-click relinking of assets throughout an entire publication or section. As mentioned in previous sections of this topic, image links can break on mounted pages when saved back to STEP from Mac clients but are opened by an InDesign server that is running on a Windows platform. The broken links become problematic when a user needs to perform an action on these document(s) within STEP that requires an InDesign server, such as 'Generate PDF.'

In this scenario, if the saved documents contain Mac-style image paths (which cause broken links for the Windows InDesign server), the Document-Asset Re-link function will correct all the links by locating the images and converting the image paths to Windows-style paths.

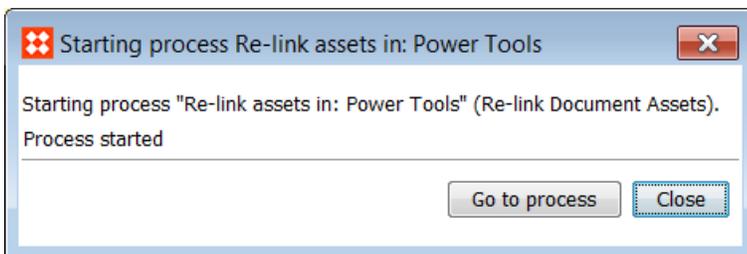
As long as the **dtp-server.properties** file has the AssetPushRoot parameter set correctly and a connection to the shared drive is established, the InDesign server will be able to open the InDesign documents that are in STEP, locate the images, and change the path in the documents so that all images are no longer 'Missing.' The InDesign documents are then saved back. Once completed, the InDesign server will be capable of, for example, generating a PDF that contains high-resolution images using the 'Generate PDF' function.

To relink all assets in a publication or section:

1. In the workbench, navigate to the relevant publication or section, then right-click and select **Document-Asset Re-link**.



2. A background process launches. Click 'Go to process' to monitor the relink progress.

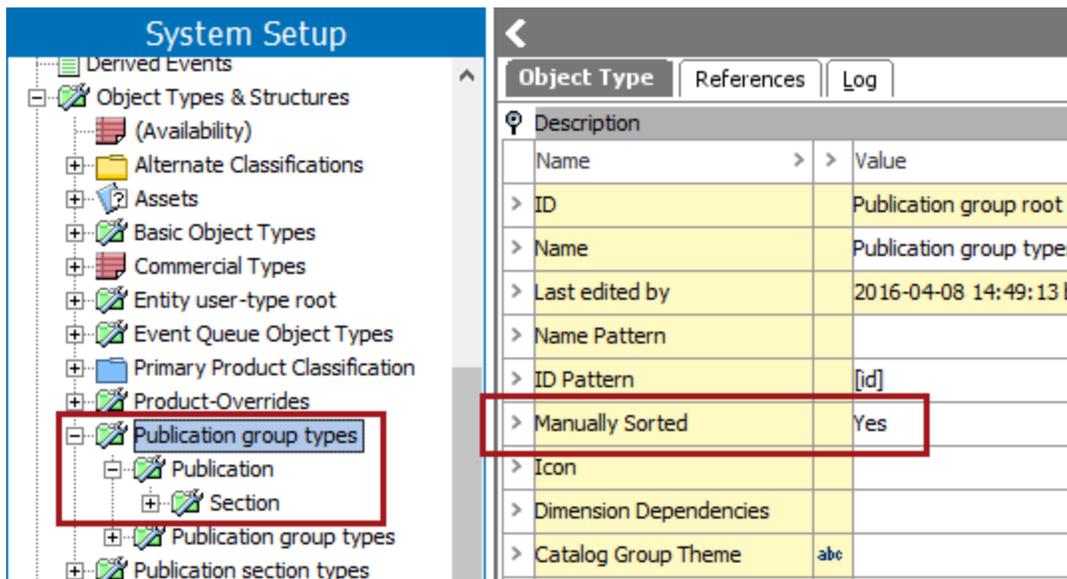


3. If the process is successful, a list of relinked asset IDs appears in the Execution report on the Background Process tab. If unsuccessful, error messages will appear to indicate the problem.

Organizing Publication Sections in STEP

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

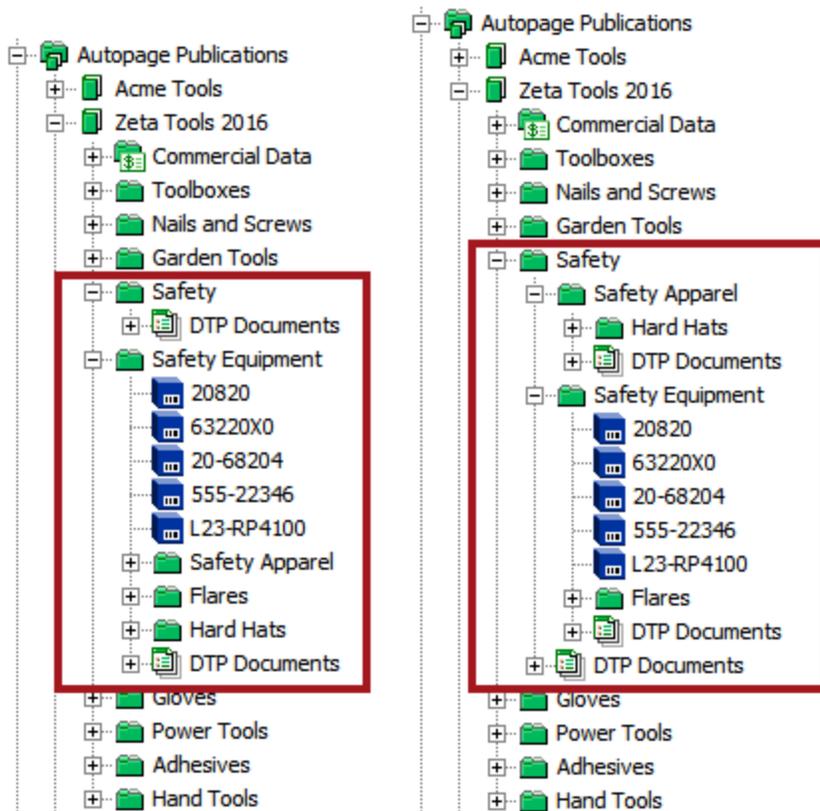
- Publication Group (typically, the object type with the STEP ID 'Publication group root')
- Publication (typically, the object type with the STEP ID 'Default publication type')
- Section (typically, the object type with the STEP ID 'Section')



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

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

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



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

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

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

InDesign Queues

Multiple InDesign queues may be created in STEP in order to sequence and prioritize jobs that are sent from STEP to an InDesign server, such as autopagination and proof view requests. InDesign queues allow jobs to be queued in the STEP server instead of within the InDesign server, allowing more control and prioritization of job requests. Such prioritization can ensure that foreground tasks (smaller tasks that do not use a background process, such as product proof views and Flatplanner page previews) are handled before background tasks (larger tasks that use background processes, such as autopagination) so users do not have to wait for a large job to finish before starting another.

Note: InDesign queues are not relevant unless your STEP system is linked to at least one InDesign server sidecar. For more information on deploying an InDesign server sidecar, contact Stibo Systems.

Use cases for needing different InDesign queues include:

1. Your creative department may be international. In this case, users in one country will use one queue, and users in another country will use a different queue. Users in each country will then have their own set of InDesign server resources and will not be 'delayed' if users in the other country are sending large jobs to the InDesign server (such as the autopagination of a publication with hundreds of pages).
2. Your creative department may have a temporary need to run multiple versions of InDesign. In this case, for example, you would use one queue for InDesign CS6 and another for InDesign CC. By allocating a publication to the CS6 queue, you will ensure that all of its documents use CS6, which will help control the ability to transition from one version to another.

Setting up the InDesign Queue

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

DTP Queue Definition					
				doc-dev-dtp.stibo.corp cs6	
	Main Queue	Reserved for Foreground	10090	10091	
Default Queue (cs6)	✓	0	✓	✓	
Germany		0			
US		0			

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

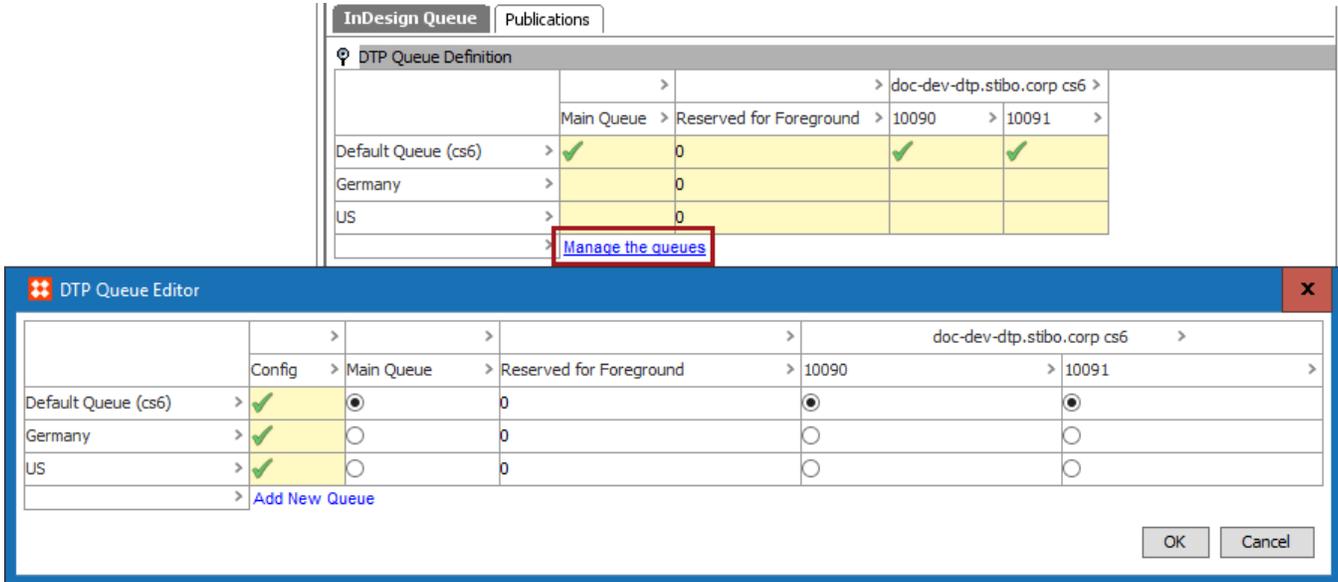
In the above screenshot, the last two columns display the InDesign server renderers that are running, the port numbers to which they are connected (for example, 10090), and the version of InDesign they are running (for example, CS6).

Queues designated as 'default' (for example, Default Queue (CS6)) are created automatically for any InDesign server renderers that are not assigned to a user-defined queue. A system-generated 'default' queue, however, is not necessarily the 'main' queue. The main queue is used when a specific queue has not been assigned to the publication from which you are generating pages. Any queue can be selected as the main queue, depending on your business needs. There is no limit to the number of InDesign queues that can be created.

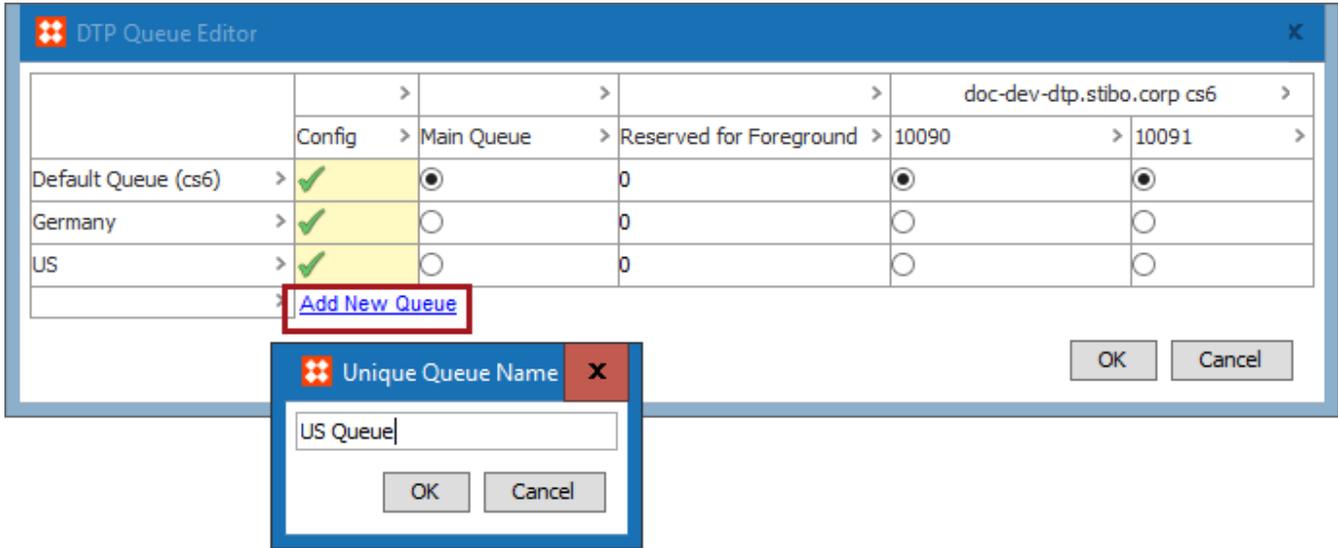
Note: The initial connection of InDesign servers to your STEP system must be performed by Stibo Systems. However, once the servers are connected, end users may create InDesign queues to prioritize the order in which pagination and proof view jobs are sent to these servers.

To create a new InDesign queue, follow these steps:

1. On the System Setup tab, navigate to **InDesign Queue**.
2. On the InDesign Queue tab, expand DTP Queue Definition, then click 'Manage the queues' to display the **DTP Queue Editor**.



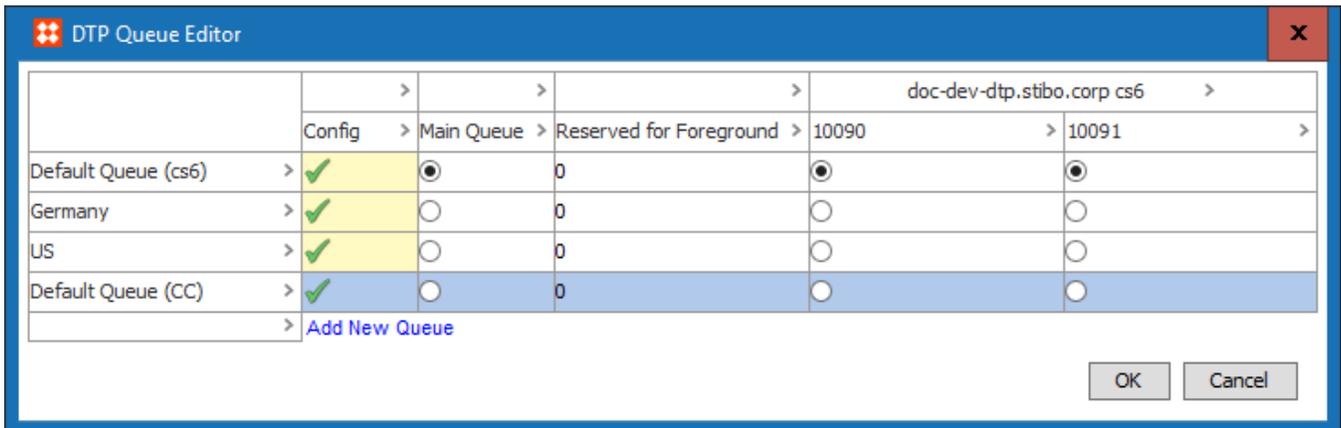
3. In the DTP Queue Editor dialog, click 'Add New Queue.'
4. In the Unique Queue Name dialog, enter a name for the queue, then click **OK**.



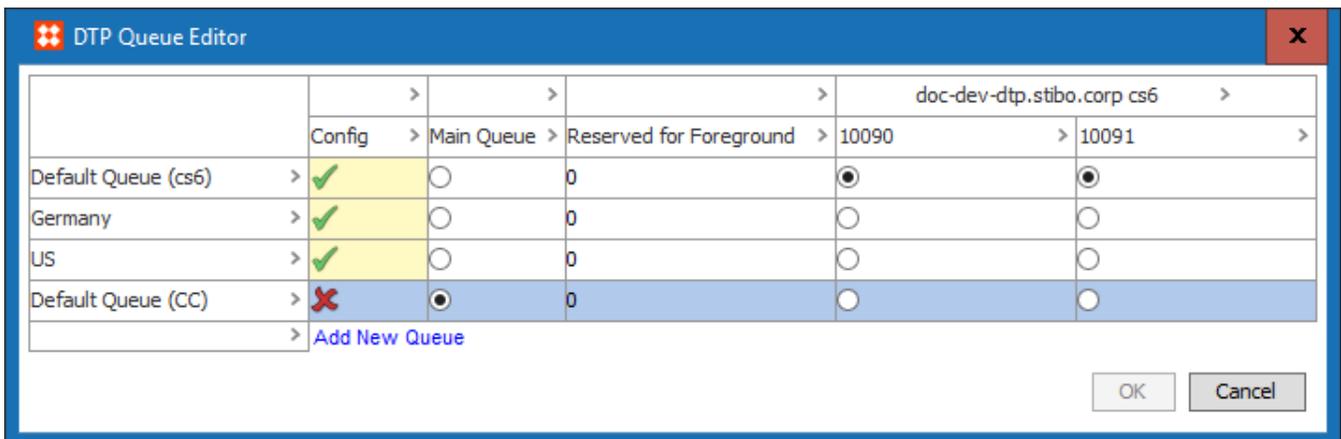
5. In the **Reserved for Foreground** column, enter a number to designate the number or renderers that should be reserved for foreground tasks, which are smaller tasks that do not use a background process (for example, product proof views and Flatplanner page previews). For a server with two renderers, for example, the number 1 would be entered to ensure that one of the two renderers is always reserved for foreground tasks. (Note that a queue cannot consist solely of foreground renderers.)

By default, all new queues are set to 0. Leaving a value of 0 means that a foreground task may have to wait until a renderer has finished processing a background task before the foreground task can complete. (If a background and foreground task are both waiting for a free renderer, the foreground task always get the first

free one. However, *not* reserving a renderer for foreground tasks means that the possibility exists for all renderers to be busy with background tasks, causing a wait for a foreground task.)



- To designate a queue as the 'main' queue, select the radio button under **Main Queue** for that queue. When designating a queue as main, at least one server renderer must be assigned to it. Not assigning at least one server renderer will result in a configuration error and the changes cannot be saved, as illustrated by the red 'X' displayed in the Config column in the following screenshot.



- Click **OK** to complete the queue setup.

Queue Operation

Prioritization

Foreground tasks are given higher priority over background tasks—otherwise the oldest task has higher priority.

Parallel Processing

Some background jobs are able to run in parallel—for example, generating a PDF of a large publication section can retrieve multiple documents in parallel and stitch them into a single PDF as each document is returned.

Queue Status

When requests are sent to the queues, the InDesign Queue screen displays the jobs in progress for each queue. The following screenshot shows an autopagination task that is being handled by the 'Default Queue (cs6)' queue. To view the associated background process as the task is in progress, click on the Background Process button.

The screenshot shows the 'InDesign Queue' window with two main sections:

DTP Queue Definition

	Main Queue	Reserved for Foreground	10090	10091
Default Queue (cs6)	✓	0	✓	✓
Germany		0		
US		0		

[Manage the queues](#)

DTP Queue: Default Queue (cs6)

User	Renderer	Description	Background Process	Start Time	Progress
usera	doc-dev-dtp.stibo.corp:10091	Paginating page 5	Paginate Zeta Tools	Thu Nov 03 14:51:06 EDT 2016	5%

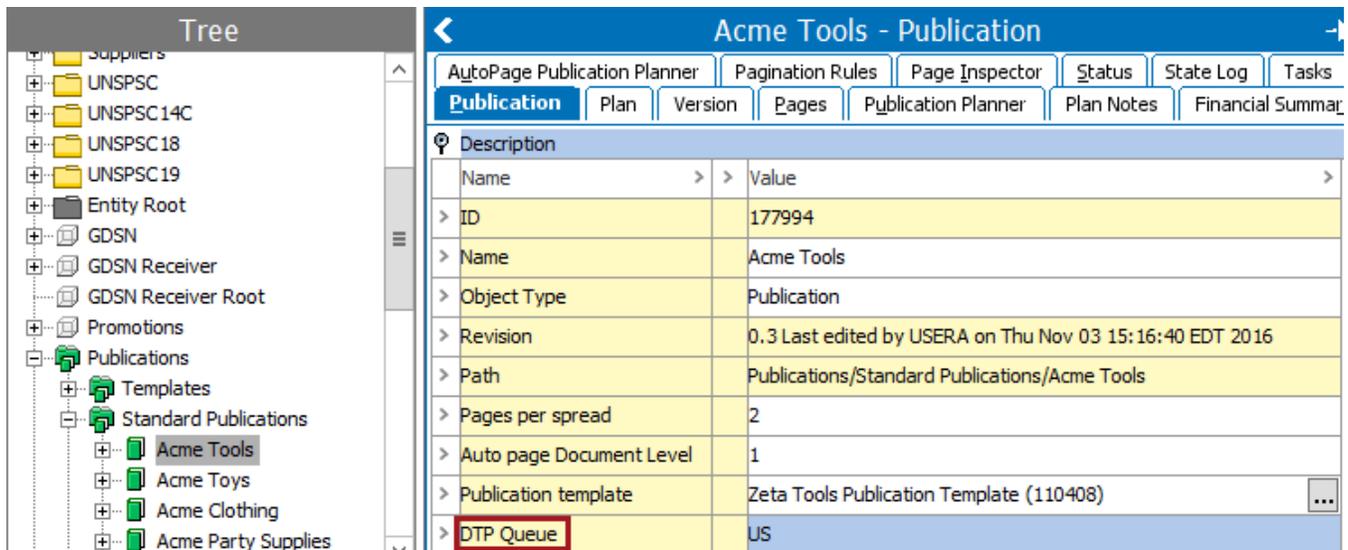
Assigning Queues to Publications

Publications and publication groups can be set to use a particular queue via the **DTP Queue** list, which, for publications is located on the **Publication** tab and for publication groups is located on the **Publication Group** tab. If only one queue exists, or if no queue is specified on the publication or publication group, the queue designated as the **Main Queue** in the DTP Queue Editor will be used.

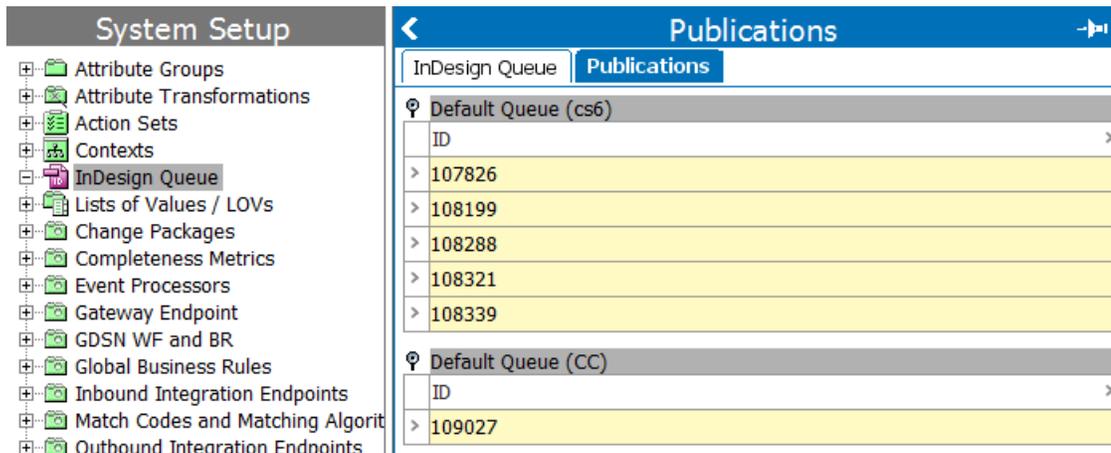
The screenshot shows the 'Standard Publications rev.0.1 - Publication Group' window. On the left is a 'Tree' view showing a hierarchy of folders including 'Standard Publications'. The main area shows the 'Publication Group' details:

Name	Value
ID	108718
Name	Standard Publications
Object Type	Publication group types
Revision	0.1 Last edited by USER on Wed Sep 09 14:42:50 EDT 2015
Path	Publications/Standard Publications
Unit	inches
DTP Queue	Germany

Queues set at the publication group level will inherit to all publications inside the group. This selection can be overridden at the individual publication level by selecting a different DTP queue for the publication, or by selecting no queue at all, in which case the main queue will be used for that publication.



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



Configuring InDesign Server Instances

InDesign server instances are controlled via the sidecar, which uses the following information from the sharedconfig.properties file on the STEP application server. (Note that these settings are typically configured by Stibo technical support rather than super users or system administrators.)

1. Space-separated list of hosts running InDesign servers. **Example:** InDesign.Instances=ids_host1 ids_host2
2. The number of instances (renderers) to create on each host. **Example:** InDesign.Renderers=3
3. The version of InDesign. **Example:** InDesign.Version=cs6
4. The port number for the first instance. **Example:** InDesign.Port=12222
5. Overrides of the above settings for individual sidecars. **Examples:** InDesign. ids_host2.Port=9090; InDesign. ids_host2.Version=cs6

The following screenshot shows a sample configuration for a Windows- based InDesign server instance:

```
#=====#  
# DTP server sidecars  
#=====#  
InDesign.Renderers = 2  
InDesign.Instances = doc-dev-dtp.stibo.corp  
InDesign.Instances = 10.64.205.155  
#InDesign.Version = cs6
```