AUTOPAGE

USER GUIDE

STEP Trailblazer 8.3

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STEP AutoPage

This documentation section / user guide contains information about the STEP AutoPage component and how it is used in connection with Adobe InDesign and STEP to create autopaginated publications. With autopagination, a selection of objects (most commonly products and assets) can be placed onto one or even hundreds of Adobe InDesign pages in a single-mount operation, requiring minimal or no manual interference.

Once an initial publication has been created, AutoPage can update these auto-generated InDesign pages with just a few clicks. For publications like catalogs and sales flyers, which need to be republished each year or season, AutoPage can save time on pagination tasks that would otherwise be performed manually, such as the updating of content, images, and pricing information. Additionally, product presentations can be easily reordered and repositioned, and pages for an entire publication can be resequenced in one operation. When autopagination is complete, AutoPage can transform the InDesign pages into printer-ready, high-resolution PDFs.

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

AutoPage Component Requirements

To use STEP AutoPage, the following components are required in addition to STEP:

- STEP Publisher
- STEP AutoPage

Other components may be required for specific features.

Third-Party Software Requirements

- Adobe InDesign Server (IDS) software, which executes the autopagination process.
- Adobe InDesign client software, for individual users. The client version of the software *must* match the server version.

Note: Supported versions of Adobe InDesign are CC 2015 (CC11), CC 2017 (CC12), and CC 2018 (CC13).

A subscription to the Adobe Creative Cloud service is required for both client and server platforms. Adobe InDesign CS6 is not supported in STEP Trailblazer versions 8.3 and above.

The Adobe InDesign server is only supported by Windows and Mac platforms. As such, additional hardware may be required in addition to the STEP application server.

Additional Prerequisites

STEP Knowledge

To use AutoPage, the following is recommended:

- Basic knowledge of STEP. See the **Getting Started / User Guide** documentation for more information.
- An understanding of STEP Publisher (STEP'n'design). For more information, see the **STEP Publisher (STEP'n'design)** section of the STEP Online Help documentation.

Fonts

All required fonts for a production must be placed onto the InDesign Server that STEP is connected to as well as on users' local client PCs or Macs. If possible, use Open Type fonts (OTF), which are both PC and Mac compatible.

InDesign Plug-Ins

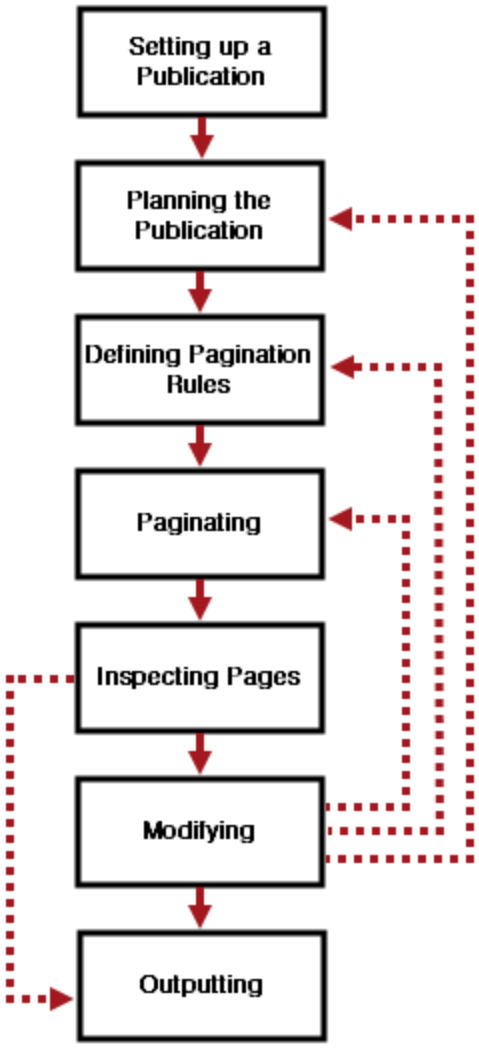
Both the InDesign Server (IDS) and any local client installations of Adobe InDesign must have the correct Adobe InDesign plug-in installed. For client installations, this is downloaded from the WebStart page of your STEP system. See the **Installing STEP'n'design** section of the **STEP'n'design** documentation for more information.

Asset Push

Since the majority of publications will utilize images, **asset push** must be configured, and the asset push sidecar must be set up and running. For more information, see the **Asset Push** section of the **Digital Asset Exchange** documentation.

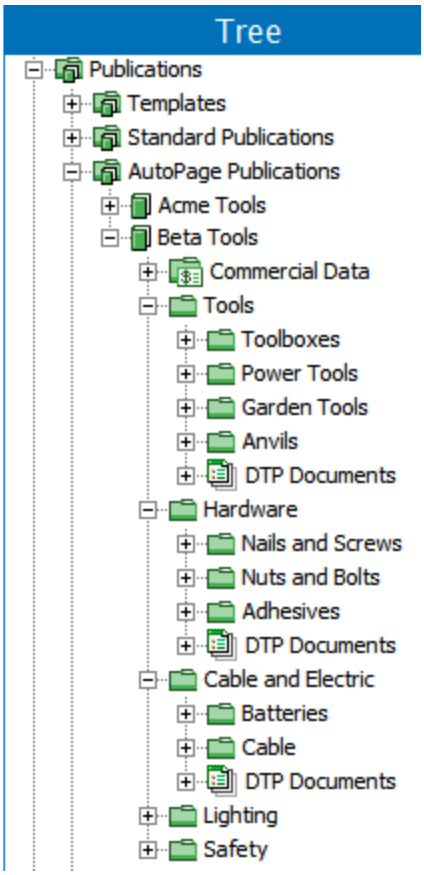
Creating a Publication in AutoPage

This topic describes how to begin the process of creating a publication in the STEP Workbench using AutoPage. The following chart is a high-level overview of the steps involved in autopagination.



Setting up a Publication

First, a publication structure must be created that defines the versions, sections, subsections, and other elements of the publication. Alternatively, you can create a new publication by duplicating an existing one. For more information, see **Creating a Publication in STEP Workbench** and **Duplicating a Publication** in the **Getting Started** / **STEP User Guide** documentation.



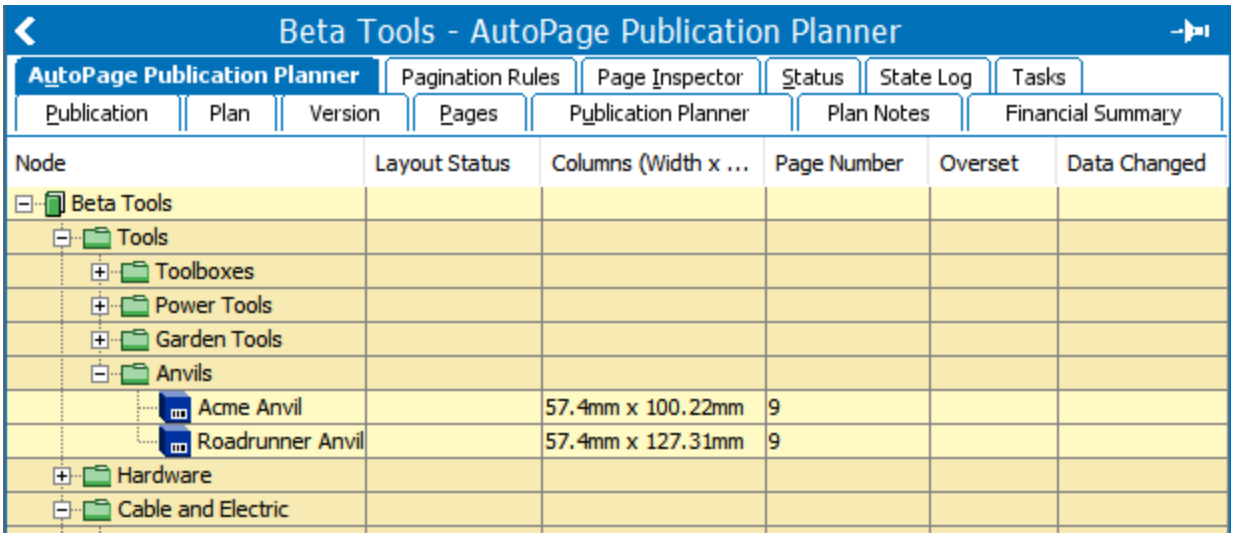
Additionally, you must create a publication template and one or more product templates in InDesign, then save them to STEP. You then apply the publication template and product templates to the relevant publication.

For more detailed information about the creation and configuration of publication and product templates, see the **Publication Templates** and **Product Templates** sections of the **STEP Publisher** / **STEP'n'design** documentation.

Planning the Publication

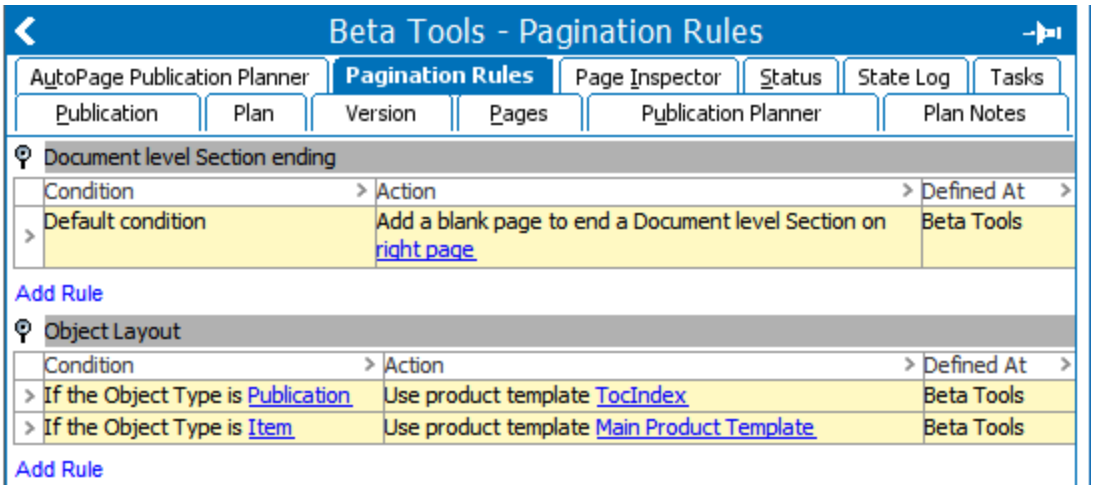
After creating the publication structure and templates for the publication, the next step is to define which products, assets, and classifications should be included in the publication, as well as specify where they belong in the publication structure. You can either drag and drop products, assets, or classifications to link them to a section, or you can import a file that contains the IDs of the objects.

Products, assets, and classifications are linked to the sections or subsections in the sequence that they should be paginated. For more information, see the topics under the **Planning and Organizing an AutoPage Publication** section.



Defining Pagination Rules

Pagination rules control how, when, and where product presentations are added to a page. Many pagination rules define which spread of the publication template applies at a point (e.g. by section), and which product template to use when mounting objects onto pages. For more information, see the **AutoPage Pagination Rules** topic.



Paginating Publications

Once the publication hierarchy has been created, the templates and objects have been linked, and the pagination rules are in place, the publication and/or sections and subsections can be paginated.

The pagination is started through a pagination request which, via a background process, makes a call to the connected InDesign server. The InDesign server then performs the pagination based on the applied publication template and pagination rules. When done, the InDesign server saves the paginated pages back to STEP. These pages are automatically saved under the DTP Documents tree nodes at the designated section level (which is defined on the publication in the 'Auto page Document Level' setting).

For more information, see the **Autopaginating Pages** topic.

Inspecting Pages

To verify that the pages look the way they should, a preview of the actual pages can be viewed and inspected in the STEP Workbench using the Page Inspector. For more information, see the **Inspecting and Editing Pages** topic.

Modifying Pages

If necessary, you can modify the sequence of objects, manually reposition objects, remount objects, reflow pages, set a different vertical justification, check if an update is needed, and set new page numbers. For more information about modifying pages, see the **Inspecting and Editing Pages** topic.

Updating Pages

Pages can be updated with new data from STEP by starting an update process. The update is started through an update request which, via an update background process, calls the InDesign server. The InDesign server then does the actual page update. When done, the InDesign server saves a new version of the paginated pages to STEP.

For more information, see the **Updating Documents in AutoPage** topic.

Setting Page Numbers

After updating, the page numbers can be reset to ensure consecutive numbering of sections. An example:

Section 1: pages 1 - 10

Section 2: pages 11 - 20

Section 3: pages 21 - 30

A request is sent to the InDesign server to update the page numbers of the actual pages in the section. The InDesign server then saves new versions of the documents to STEP.

For more information, see the **Controlling Page Numbers** topic.

Outputting Pages to PDF

When the pages are ready to go to the printer, they can be exported to high-resolution PDFs from the workbench by making a call to the connected InDesign server. For more information, see the **Generating PDFs for Proof Viewing** topic.

Overview of the AutoPage Interface

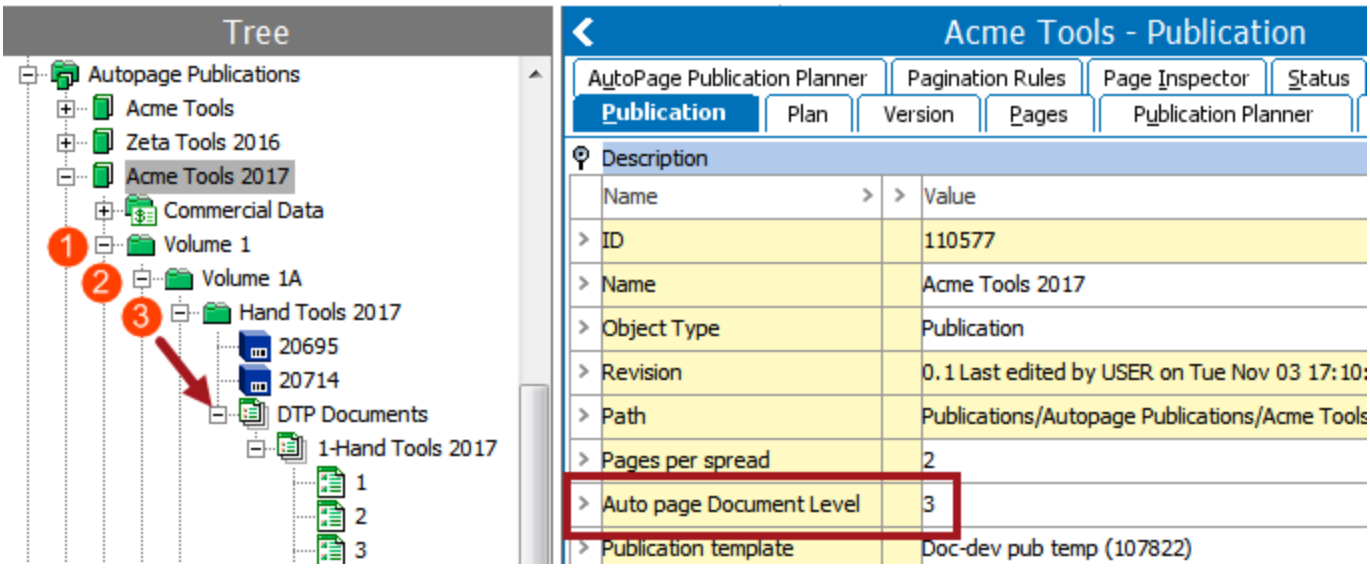
The AutoPage interface consists of four main tabs in the STEP Workbench :

- Publication
- AutoPage Publication Planner
- Pagination Rules
- Page Inspector

Publication Tab

AutoPage Document Level

AutoPage publications include an **Auto page Document Level** setting. This setting determines the section or subsection level at which InDesign documents (actual pages) are stored. The below screenshot shows the location of an InDesign document stored in a publication with an AutoPage Document Level setting of 3. For more information, see the **Autopaginating Pages** topic.

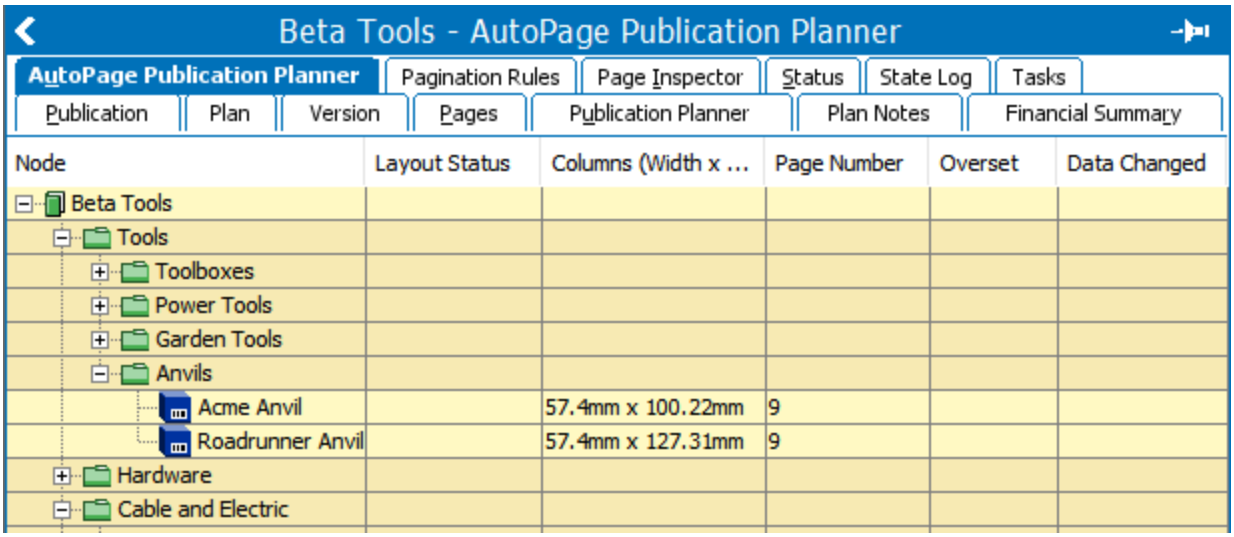


Additional Publication Options

Additional publication-specific options that apply to AutoPage publications are also available on the Publication tab, including 'Publication template' and 'DTP Queue.' For more information, see **Creating a Publication** in the **Getting Started** / **STEP User Guide** documentation. For information on DTP Queues, see the **InDesign Queues** section of the **STEP Publisher** / **STEP'n'design** documentation.

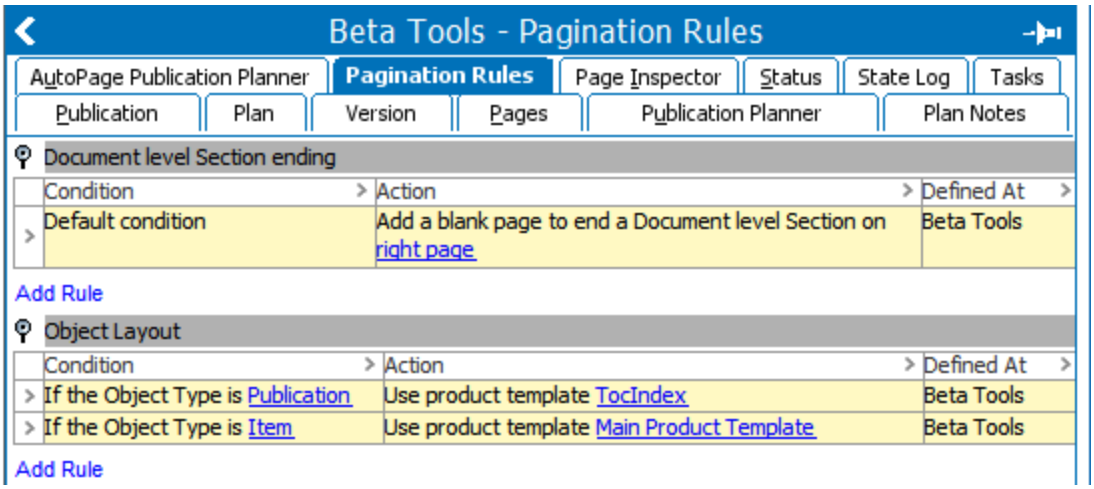
AutoPage Publication Planner Tab

Use the AutoPage Publication Planner to plan page content and view the status of paginated pages. For full details, see the **AutoPage Publication Planner** topic.



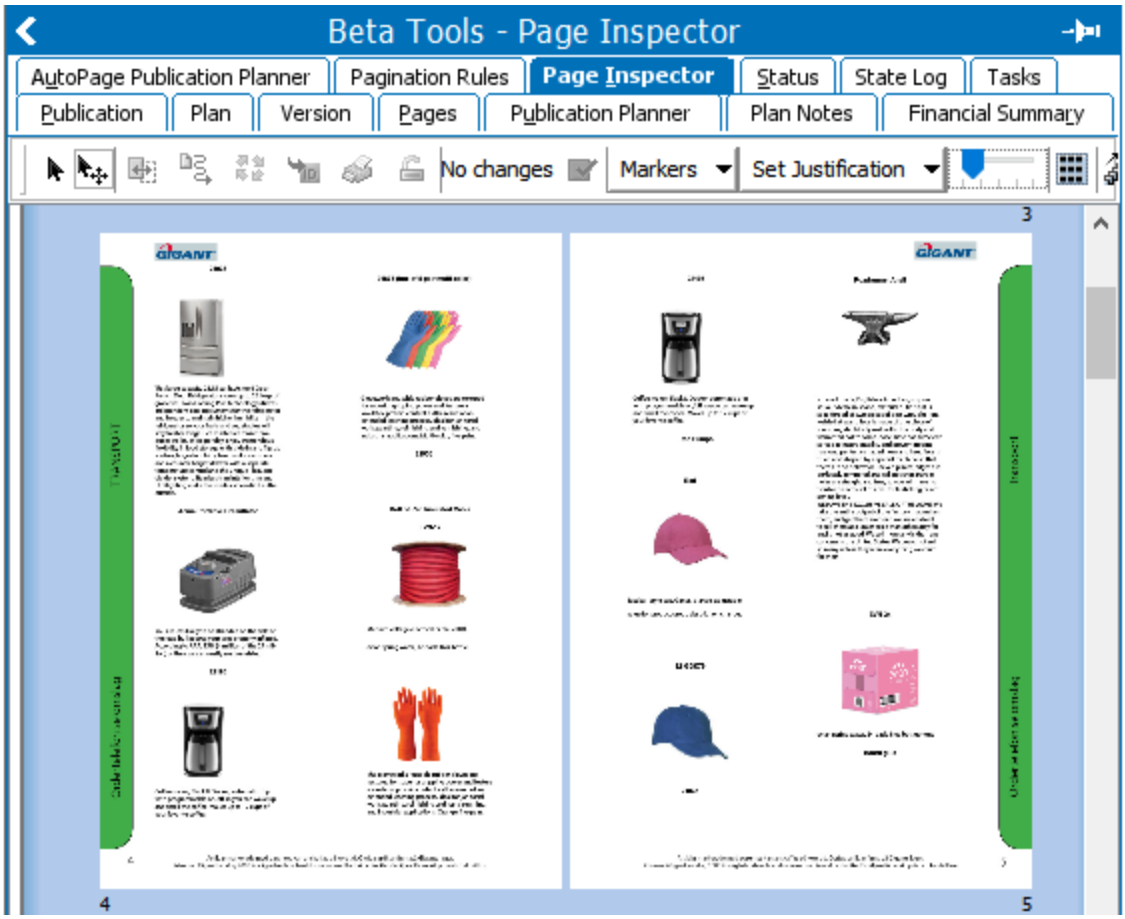
Pagination Rules Tab

Use the Pagination Rules tab to define and gain an overview of all pagination rules. All pagination rule **conditions** and **actions** are displayed, including the location in the publication structure where the rules are defined. For more information, see the **AutoPage Pagination Rules** topic.



Page Inspector Tab

Use the Page Inspector to view the paginated pages, their page numbers, and the products mounted on them. For more information, see the **Page Inspector** topic.


Beta Tools - Page Inspector
AutoPage Publication Planner
Pagination Rules
Page Inspector
Status
State Log
Tasks
Publication
Plan
Version
Pages
Publication Planner
Plan Notes
Financial Summary
No changes
Markers
Set Justification
3
4
5

Planning and Organizing an AutoPage Publication

Though much of the initial planning for the organization and product selection of an AutoPage publication may happen outside of STEP, the order of the objects that will appear in the publication, as well as the order of the publication sections themselves, is set within the STEP Workbench. This organization takes place within the **Tree** and the **AutoPage Publication Planner**.

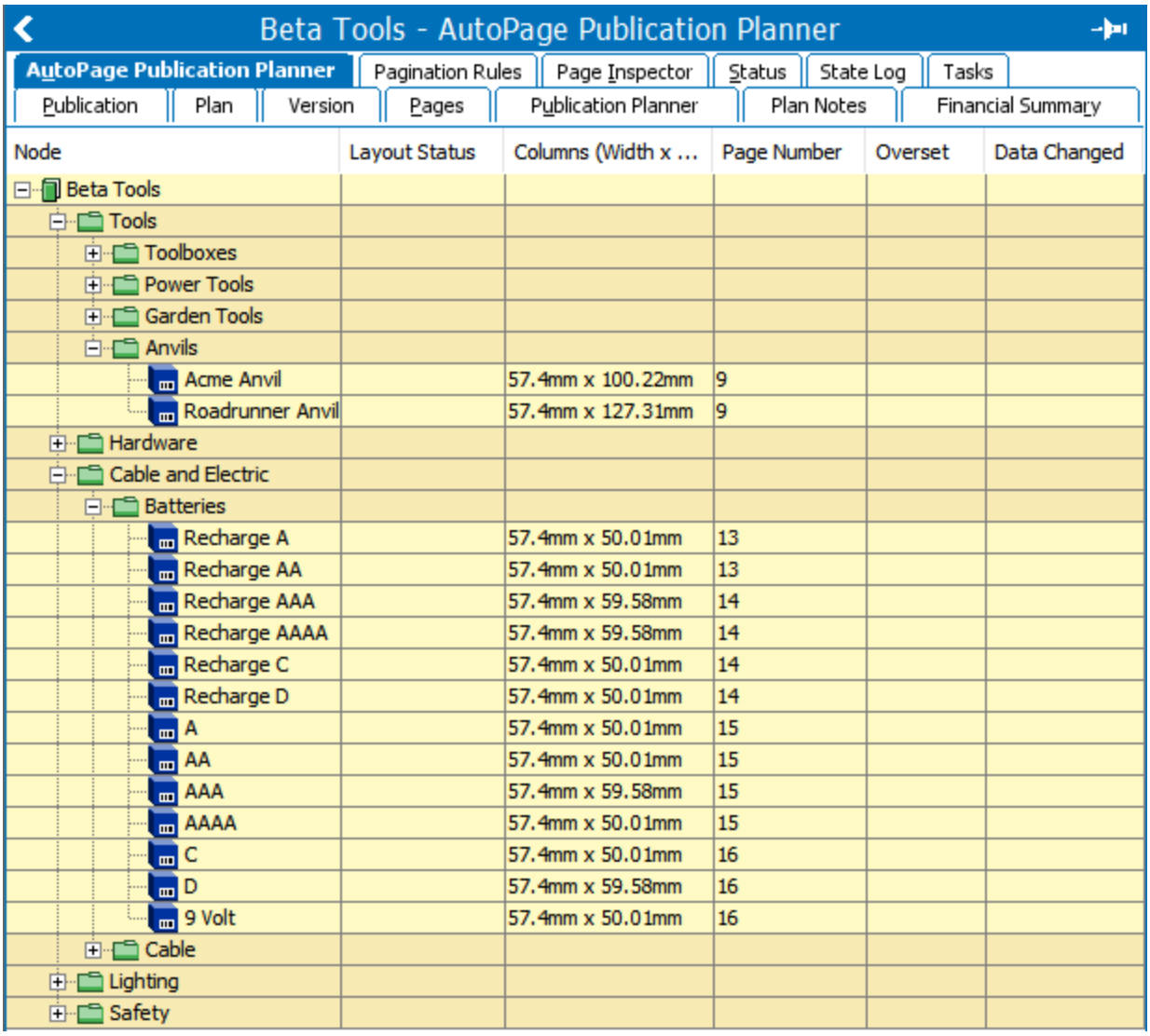
This documentation section contains the following topics:

- AutoPage Publication Planner
- Organizing AutoPage Publication Sections
- Linking and Unlinking Objects in AutoPage Publications
- Resequencing Linked Objects in AutoPage Publications

AutoPage Publication Planner

The AutoPage Publication Planner is used to plan page content and view the status of paginated pages. It is also used to resequence publication sections and either resequence or remove the products, classifications, and assets that are linked to them.

To view the AutoPage Publication Planner, select a publication, section, or subsection in the Tree, then click the **AutoPage Publication Planner** tab.



Node	Layout Status	Columns (Width x ...	Page Number	Overset	Data Changed
Beta Tools					
Tools					
Toolboxes					
Power Tools					
Garden Tools					
Anvils					
Acme Anvil		57.4mm x 100.22mm	9		
Roadrunner Anvil		57.4mm x 127.31mm	9		
Hardware					
Cable and Electric					
Batteries					
Recharge A		57.4mm x 50.01mm	13		
Recharge AA		57.4mm x 50.01mm	13		
Recharge AAA		57.4mm x 59.58mm	14		
Recharge AAAA		57.4mm x 59.58mm	14		
Recharge C		57.4mm x 50.01mm	14		
Recharge D		57.4mm x 50.01mm	14		
A		57.4mm x 50.01mm	15		
AA		57.4mm x 50.01mm	15		
AAA		57.4mm x 59.58mm	15		
AAAA		57.4mm x 50.01mm	15		
C		57.4mm x 50.01mm	16		
D		57.4mm x 59.58mm	16		
9 Volt		57.4mm x 50.01mm	16		
Cable					
Lighting					
Safety					

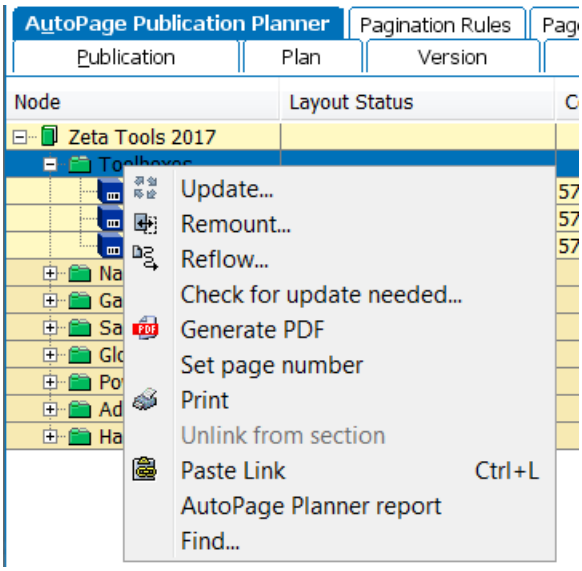
Columns in the AutoPage Publication Planner

The following table describes the columns contained in the AutoPage Publication Planner. Note that columns cannot be added to / removed from the planner.

Column Name	Description
Node	Displays the publication, sections, subsections, and linked objects within the publication.
Layout Status	Displays 'Locked' if the object's layout has been locked in the Page Inspector. For more information about locking and unlocking layouts, see the **Page Inspector** topic.
Columns (Width x Height)	The width and height of the product presentation on the paginated page. An asterisk (*) next to the value means that the product presentation is split over more than one page. **Note:** The unit always displays in mm, even if a different unit is applied to the publication group that contains the publication.
Page Number	Page where the object is mounted.
Overset	Displays 'Overset' if there is at least one frame on the InDesign page where there is too much content to fit inside of the frame. For more information on oversets, see the **Viewing Markers and Overset Text** topic.
Data Changed	Displays 'Data changed' if content on the page has been changed in STEP since the page was mounted. **Note:** A 'check for update needed' operation must be performed on a section or subsection before the system will know if any data has changed on the page. For more information, see the **Updating Documents in AutoPage** topic.

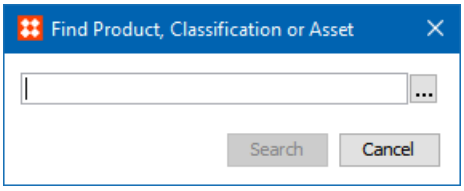
Available Right-click Actions in the Publication Planner

From the AutoPage Publication Planner you can perform the following actions by right-clicking either on the publication, a section, or a linked object.



Action	Description	Level Where Available		
		Publication	Section	Linked Object
Update	Updates the product content on pages in the selected publication or section. You can either update all content or select a subset of information, such as attribute values, commercial terms, or image references. For more information, see **Updating Documents in AutoPage**.	X	X	
Remount	Remounts one or more objects at a time. For more information, see **Remounting and Reflowing Objects**.		X	X
Reflow	Reflows objects from the selected object until the end of a page or the end of a section. For more information, see **Remounting and Reflowing Objects**.	X	X	X
Check for update needed	Launches a background process that scans through all pages in the section and determines if data has changed on any of the mounted products in STEP since the pages were		X	

Action	Description	Level Where Available		
		Publication	Section	Linked Object
	mounted. For more information, see **Updating Documents in AutoPage**.			
Generate PDF	Generates a PDF of the publication or selected section. (Pages must first be autopaginated.) See the **Generating PDFs for Proof Viewing** topic for more information.	X	X	
Set page number	Remounts pages (either fully or partially) in the selected publication or section so that they start on a specified page. For more information, see **Controlling Page Numbers**.	X	X	
Print	Prints the documents contained within the publication or selected section. For more information, see **Printing Pages in AutoPage**.	X	X	
Unlink from section	Unlinks the product, asset, or classification object from the section. See **Linking and Unlinking Objects in AutoPage Publications** for more information.			X
Paste Link	This option is enabled when a product, asset, or classification object has been copied from the Tree. Selecting Paste Link will link the copied object into the section. See **Linking and Unlinking Objects in AutoPage Publications** for more information.		X	
AutoPage Planner report	Extracts a CSV file that pulls all available information from the AutoPage Publication Planner, including all node levels of the publication and what objects are linked to each section and subsection. For more information, see the 'Creating an AutoPage Planner Report' subsection below.	X	X	

Action	Description	Level Where Available		
		Publication	Section	Linked Object
Find	Launches a dialog that enables search for a product, classification, or asset within the publication or selected section.  	X	X	

Creating an AutoPage Planner Report

The AutoPage Planner Report is a comma-separated (CSV) file that contains the information displayed in the AutoPage Publication Planner. This report provides both the STEP ID and Name of the products linked into the publication and is helpful for users who wish to view this information offline.

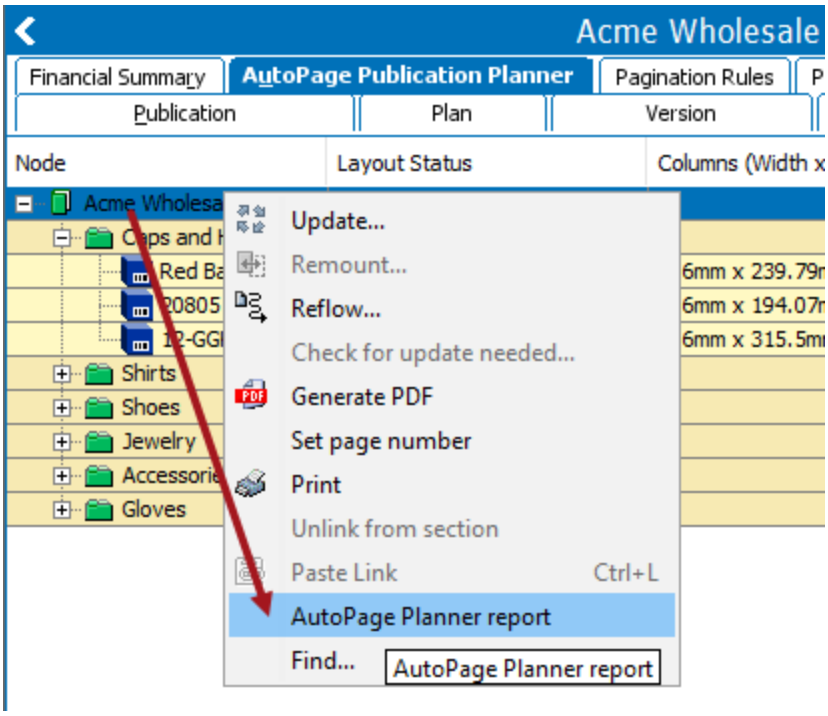
The following screenshot shows a portion of a sample AutoPage Planner Report, as viewed in Excel.

	A	B	C	D	E	F	I	J	K	L	M
1	'Start Node'	'Beta Tools'	'170448'								
2	'Node level 1'	'Node level 1 - ID'	'Node level 2'	'Node level 2 - ID'	'Node level 3'	'Node level 3 - ID'	'Layout Status'	'Columns (Width x Height)'	'Page Number'	'Overset'	'Data Changed'
3	"	"	"	"	"	"	"	"	"		
4	"	"	'Tools'	'241736'	"	"	"	"	"	"	
5	"	"	"	"	'Toolboxes'	'170451'	"	"	"	"	
6	"	"	"	"	"	"	"	'160mm x 204.19mm'	'2'	"	
7	"	"	"	"	'Power Tools'	'170471'	"	"	"	"	
8	"	"	"	"	"	"	"	'57.4mm x 62.37mm'	'18'	"	
9	"	"	"	"	"	"	"	'57.4mm x 50.01mm'	'18'	"	
10	"	"	"	"	"	"	"	"	"	"	
11	"	"	"	"	"	"	"	'57.4mm x 103.6mm'	'18'	"	
12	"	"	"	"	"	"	"	"	"	"	
13	"	"	"	"	"	"	"	"	"	"	
14	"	"	"	"	"	"	"	'57.4mm x 62.96mm'	'19'	"	
15	"	"	"	"	"	"	"	'57.4mm x 62.96mm'	'19'	"	
16	"	"	"	"	"	"	"	'57.4mm x 73.12mm'	'19'	"	
17	"	"	"	"	"	"	"	'57.4mm x 73.12mm'	'20'	"	
18	"	"	"	"	'Garden Tools'	'170453'	"	"	"	"	
19	"	"	"	"	"	"	"	"	"	"	
20	"	"	"	"	"	"	"	'57.4mm x 103.6mm'	'4'	"	
21	"	"	"	"	"	"	"	'57.4mm x 95.38mm'	'4'	'Overset'	
22	"	"	"	"	"	"	"	'57.4mm x 66.35mm'	'4'	"	

To generate an AutoPage Planner Report:

1. In the Tree, select the relevant publication, section, or subsection, then go to the **AutoPage Publication Planner** tab.

2. In the AutoPage Publication Planner, select the publication, section, or subsection from which you want to pull a report, then right-click and select **AutoPage Planner report**.



3. In the 'Save' dialog, choose a 'Save in' destination, then enter a file name and click **Save**.
4. The report is generated and saved in the selected file location.

Organizing AutoPage Publication Sections

After creating an AutoPage publication structure, it is common to reorganize the order of the sections after the initial creation of the structure. Additionally, since it is very uncommon for all publication sections to be organized in alphabetical order, the object types that comprise the hierarchy must be set to be manually sorted.

Publication sections can be organized in two places in the workbench—in the **Tree** and in the **AutoPage Publication Planner**. Using the Tree is the recommended method, since subsections cannot be promoted to top-level sections in the AutoPage Publication Planner; they can only be reordered within their parent sections.

Organizing Publication Sections and Subsections in the Tree

Sections and subsections in publications can be manually organized in the Tree through 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')

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

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

For more information, see **Organizing Publication Sections in the Workbench** in the **STEP'n'design** documentation.

Using the AutoPage Publication Planner

1. In the Tree, click the relevant section or subsection.
2. On the **AutoPage Publication Planner** tab, click the object you want to change the sequence of, and then drag and drop it to its new position.

Note: You must repaginate or reflow the pages before the object resequencing takes effect on the page.

Linking and Unlinking Objects in AutoPage Publications

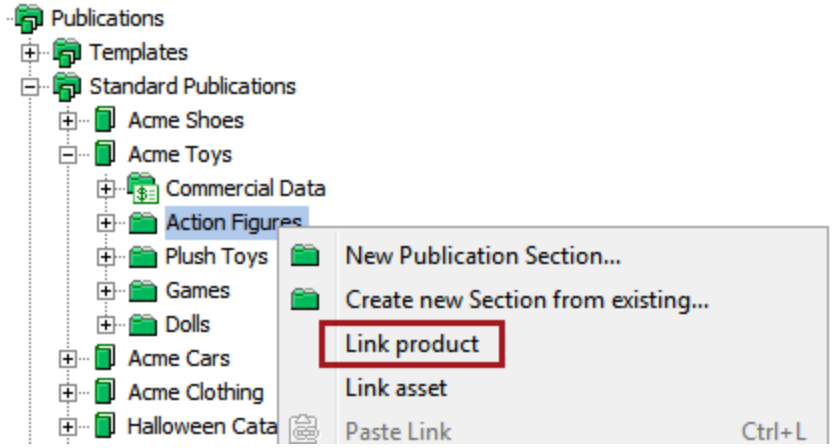
Products, assets, and/or classifications must be linked to the sections and subsections of the publication before the publication can be paginated. These objects are mounted onto the pages of the publication and are paginated in the sequence in which they appear in the publication hierarchy. As such, linking objects to publication sections is mandatory for AutoPage publications. Product, asset, and classification objects may be linked to publication **sections** and **subsections** in the publication hierarchy. Product and asset objects (but not classifications) may also be linked to **publications** (top-level publication objects).

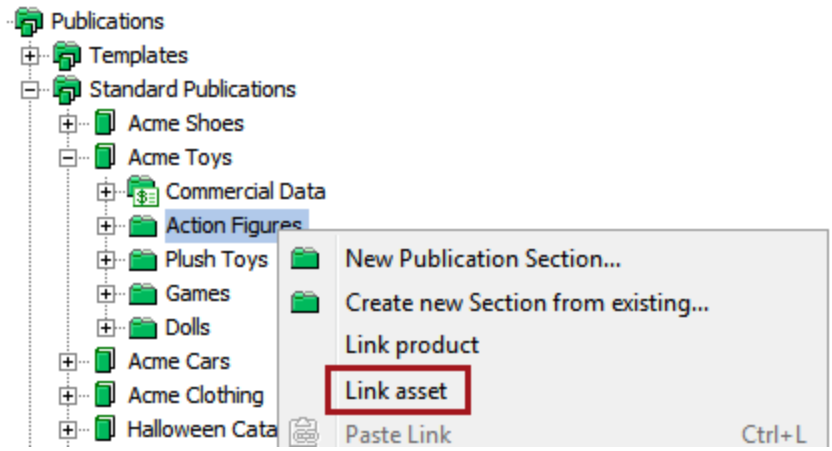
Several methods are available for linking objects into AutoPage publications:

- Manually linking objects to publications and publication sections through right-click actions within the publication hierarchy in the Tree
- Manually linking objects to publications and publication sections from the objects' References tab
- Using drag and drop or copy and paste in the Tree
- Using drag and drop or copy and paste in the AutoPage Publication Planner
- Using an imported STEPXML or Publication Excel file that contains product IDs, asset IDs, classification IDs, and/or unique key IDs

Manually Link Objects From the Publication Hierarchy

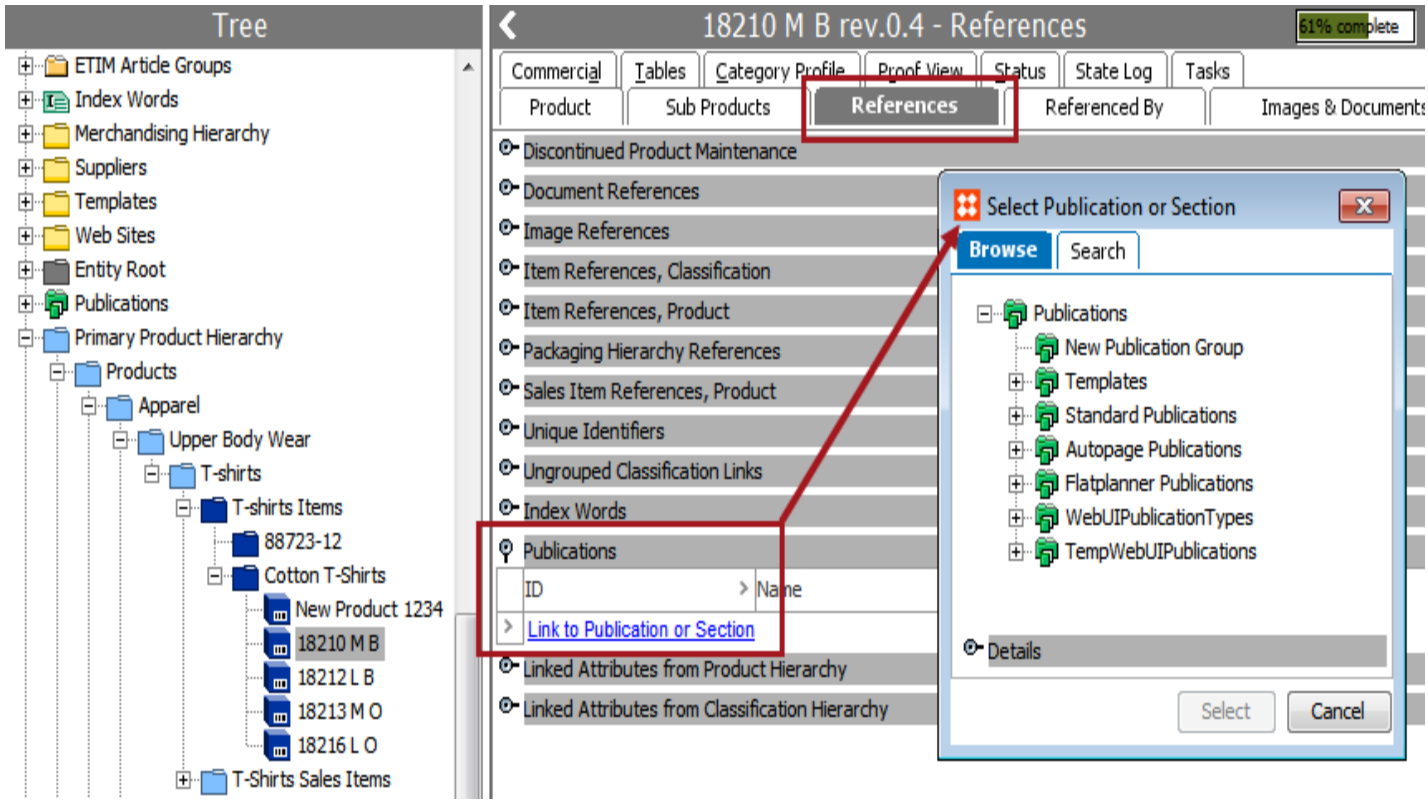
Product and asset objects can be linked to publication and/or section and subsection objects in the Tree through right-click actions on publication hierarchy objects. For full details and instructions, see the **Linking and Unlinking Publication Products, Assets, and Classifications** topic in the **Publications** section of the **Getting Started** / **User Guide** documentation.





Manually Link Objects From the References Tab

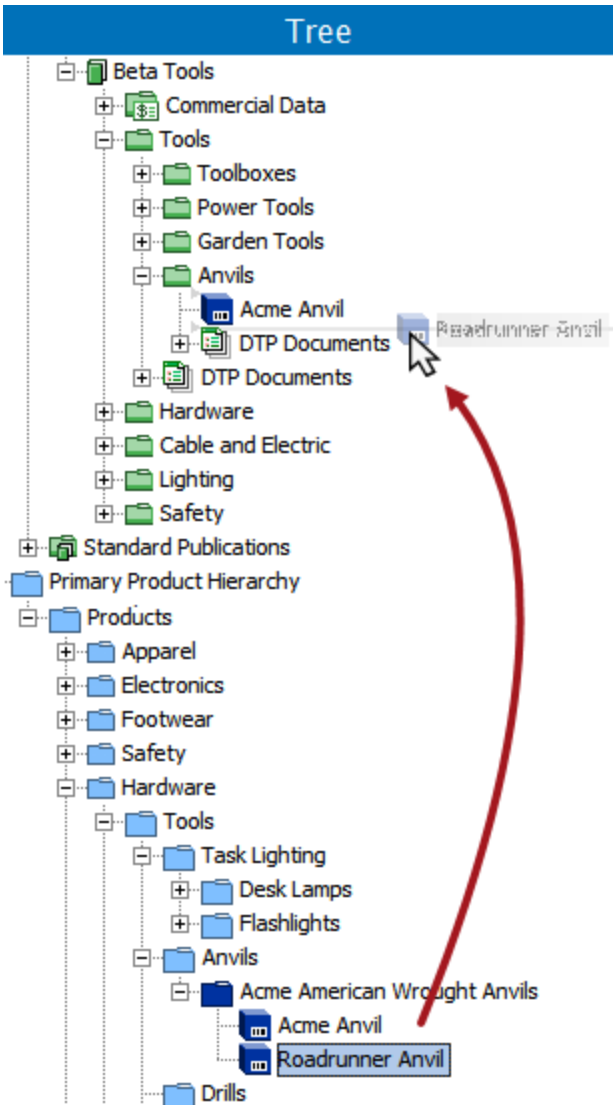
Objects can also be linked into publication sections from the References tab by clicking 'Link to Publication or Section' under the Publications flipper. For full details, see the **Linking and Unlinking Publication Products, Assets, and Classifications** topic in the **Publications** section of the **Getting Started** / **User Guide** documentation.



Drag and Drop Objects Within the Tree

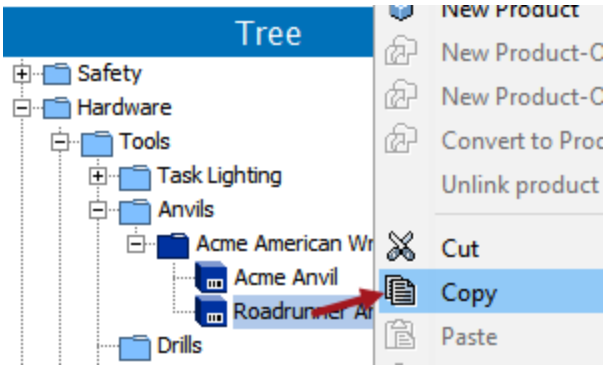
1. Expand the publication section or subsection to which you want to link objects.
2. In the product or classification hierarchy, select the relevant object, then hold down your left mouse key and drag and drop the object into the relevant section or subsection. To select multiple objects, press and hold the SHIFT or CTRL key while you click the relevant objects.

Note: When you drag and drop a product node or a classification node into a section or subsection, only the node itself is inserted. No child nodes are inserted.

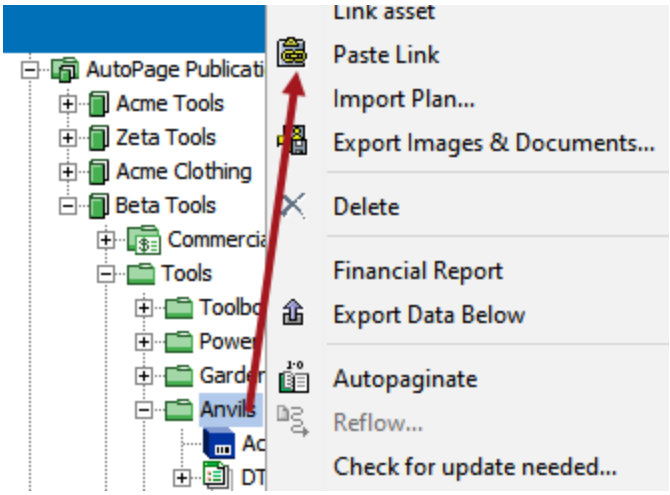


Copy and Paste Objects Within the Tree

1. In the Tree, select the object(s) that you want to link to the publication section or subsection, then right-click and select **Copy**. Objects can be multi-selected by holding the Shift or CTRL key while making selections.

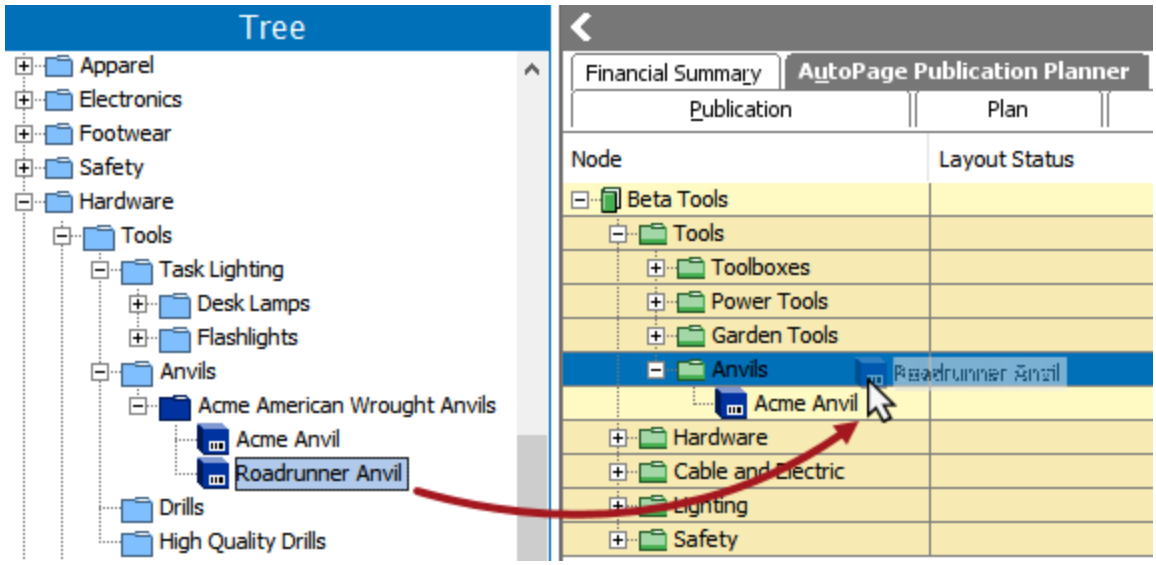


2. Select the publication section where the object(s) should be linked, then right-click and select **Paste Link**.



Drag and Drop Objects to the AutoPage Publication Planner From the Tree

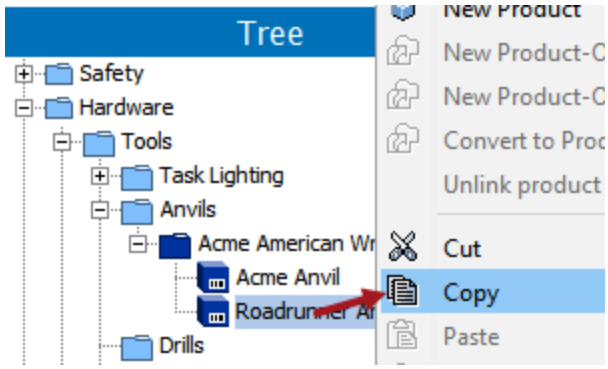
1. Navigate to the relevant publication or section / subsection, then click on the AutoPage Publication Planner tab.
2. In the product or classification hierarchy, select the relevant object, then hold down your left mouse key and drag and drop the object into the relevant section or subsection within the AutoPage Publication Planner. To select multiple objects, press and hold the Shift or CTRL key while you click the relevant objects.



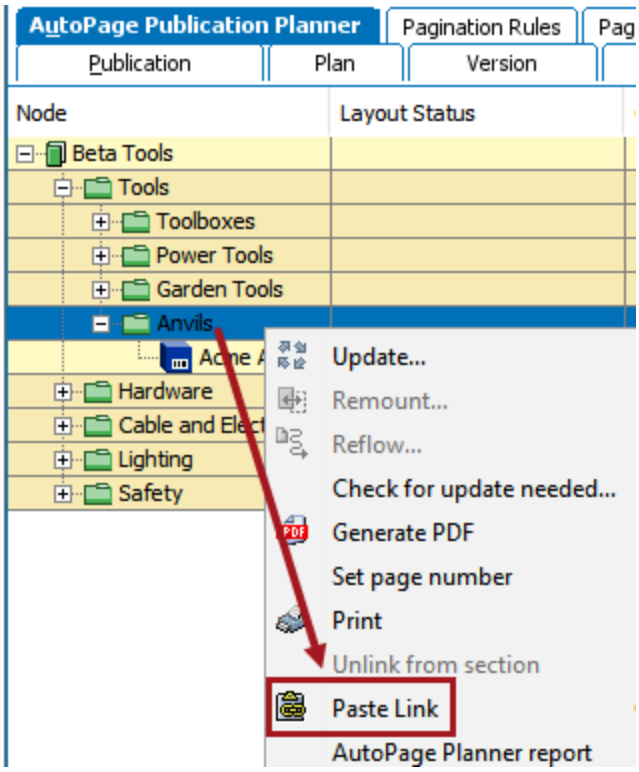
Note: To multi-select objects from the Tree, you must first lock the AutoPage Publication Planner editing area by clicking the **thumb pin** icon in the upper left corner of the interface. If not locked, the editor will change to display information about the object(s) selected in the Tree. When locked, the thumb pin icon looks like this: .

Copy and Paste Objects From the Tree Into the AutoPage Publication Planner

1. In the **Tree**, select the object(s) that you want to link to the publication section or subsection, then right-click and select **Copy**. Objects can be multi-selected by holding the Shift or CTRL key while making selections.



2. In the **AutoPage Publication Planner**, select the publication section where the object(s) should be linked, then right-click and select **Paste Link**.



Import a STEPXML or Publication Excel File

You can link products, assets, and/or classifications to a publication by importing a STEPXML file or Publication Excel file. See the **Exporting and Importing AutoPage Publications in STEPXML** topic and the **Exporting and Importing AutoPage Publications in Publication Excel** topic for more information.

Note: It is not possible to *unlink* an object from the publication structure by importing an XML file. Unlinking must be performed manually, either from the Tree or the AutoPage Publication Planner.

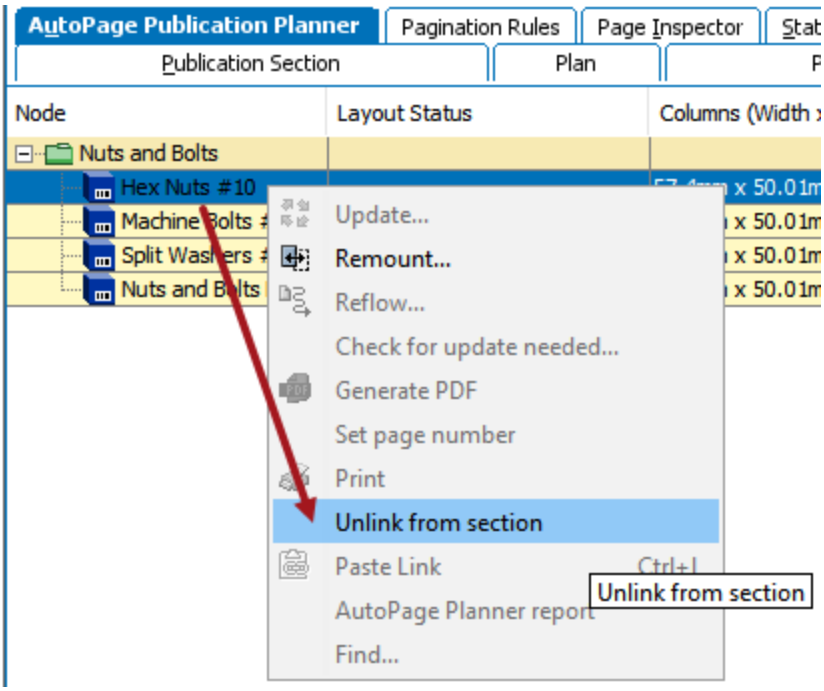
Remove Products, Assets, or Classifications from an AutoPage Publication

Objects can be unlinked from AutoPage publications, sections, and subsections, but these unlink operations must be performed *manually*. Objects cannot be unlinked through the import of a STEPXML or Publication Excel file.

1. In the Tree, navigate to the relevant publication or subsection, then locate the object(s) that you want to unlink. Multiple objects can be selected by holding the Shift or CTRL key while making selections.
2. Select and right-click the object(s), then choose the relevant 'unlink' option (Unlink product, Unlink asset, or Unlink classification.

   For more information (including screenshots), see the **Linking and Unlinking Publication Products, Assets, and Classifications** topic in the **Publications** section of the **Getting Started** / **Super User** documentation.

3. Alternatively, on the **AutoPage Publication Planner** tab, right-click the relevant object, and then choose **Unlink from section**.

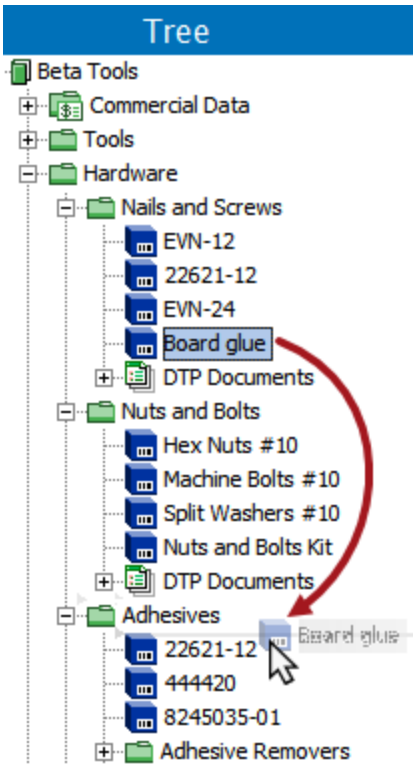


Resequencing Linked Objects in AutoPage Publications

Objects (product, assets, and/or classifications) may need to be resequenced within their respective publication sections after the initial object linking is performed. Objects can be resequenced in the Tree, in the AutoPage Publication Planner, and through either a STEPXML or Publication Excel import.

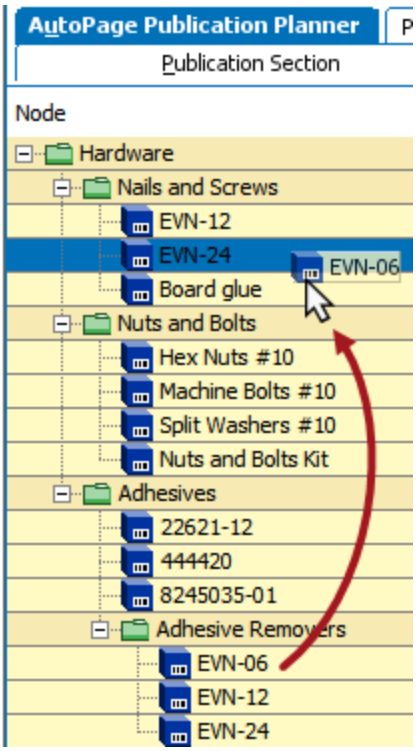
Resequence in the Tree

In the **Tree**, click the object you want to move, then hold down your left mouse button and drag and drop the object to the preferred position in the publication hierarchy. This move can be within a section or from one section to another.



Resequence in the AutoPage Publication Planner

On the **AutoPage Publication Planner** tab, click the object you want to move, then hold down your left mouse key and drag and drop the object to the preferred position. As with the tree, this can be from a section to another section or within a section.



Resequence Using STEPXML

If you use a **STEPXML** file to link objects to a publication, you can change the sequence of the objects by rearranging their tags containing either the STEP ID or unique key IDs in a STEPXML file exported from the publication, then reimporting the file.

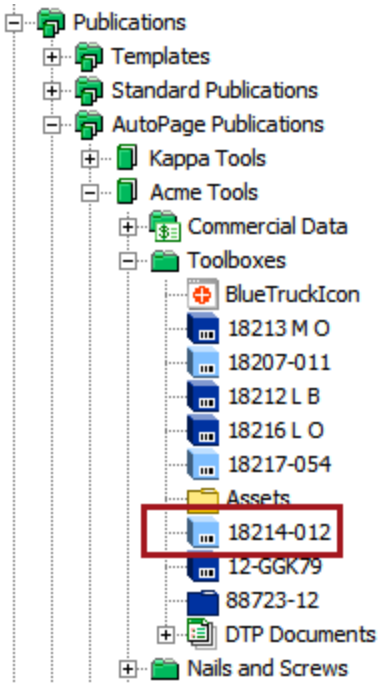
The following example shows how to change the product sequence and add a product using a STEPXML file.

The product named **18214-012**, which uses a STEP ID as an identifier, is moved by changing the position of its tag in the STEPXML file: *<AutoPageProductLink ProductID="18214"/>*. A new product, which uses a unique key as an identifier, is added to the file for the after example: *<KeyValue KeyID="SupplierPartNo">123456-ABC</KeyValue>*. This product will display with the name **18210 M B**.

This sample code is an extract of a STEPXML file. To view a complete file, see the **Exporting and Importing AutoPage Publications in STEPXML** topic.

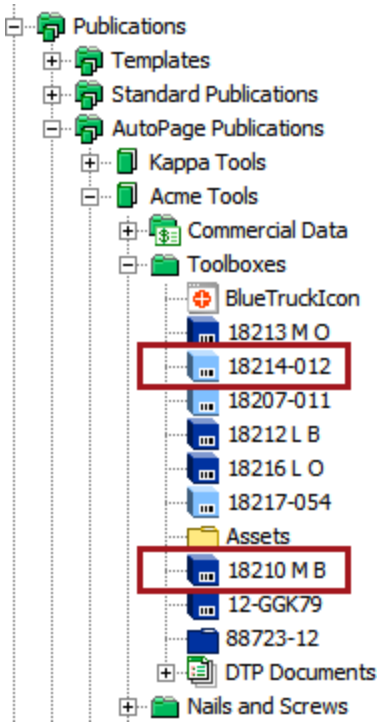
For the STEPXML example, see the online version of this topic.

Objects in Tree Before Sequence Change and Product Addition



For the STEPXML example of this, see the online version of this topic.

Objects in Tree After Sequence Change



AutoPage Pagination Rules

A pagination rule is a rule that controls how, when, and where objects (typically products, but also assets and classifications) are mounted onto InDesign pages when autopaginating publications.

A pagination rule consists of one or more conditions and an action that takes place when the condition or conditions are met. Detailed criteria must be specified for some conditions and actions.

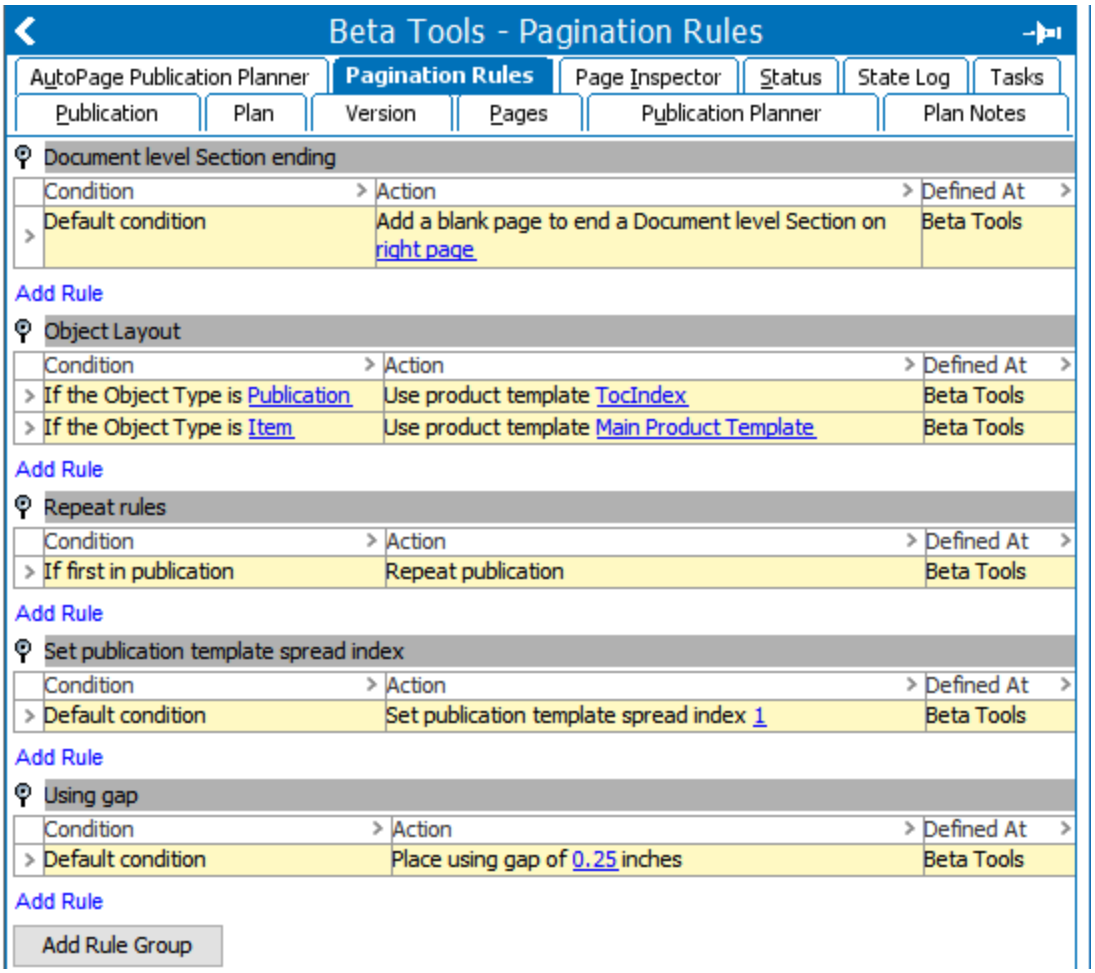
Pagination rules can be applied to entire publications as well as individual sections and subsections. Rules inherit down from the parent publication level to child sections and subsections. Inherited rules can also be overridden, or, rules can be created on sections only and not set at the publication level at all.

Important: In order to run autopagination, at least one 'Object layout' rule must exist. See the **AutoPage Pagination Rule Actions** topic for more information.

Pagination Rules Tab

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

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



Pagination Rule Groups

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

For detailed information on pagination rule groups and their available **actions**, see **AutoPage Pagination Rule Actions**.

For detailed information on the **conditions** available for pagination rule group actions, see **AutoPage Pagination Rule Conditions**.

Pagination Rule Inheritance

Pagination rules are inherited from parent publication objects to child section objects (and from parent section objects to child subsection objects) in the same fashion that specification attributes, references, and so forth, are inherited in the product hierarchy in the Tree.

The **Defined At** column displays where the rules are inherited from.

AutoPage Publication Planner | **Pagination Rules** | Page Inspector | Status | State Log | Tasks

Publication Section | Plan | Publication Planner | Plan Notes | Fir

Document level Section ending

Condition	Action	Defined At
Default condition	Add a blank page to end a Document level Section on left page	Beta Tools

Add Rule

Object Layout

Condition	Action	Defined At
If the Object Type is Publication	Use product template TocIndex_CS6	Toolboxes
If the Object Type is Item	Use product template PublicationTitleLeft	Toolboxes
If the Object Type is Item Family	Keep User Assigned Template	Toolboxes

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

It is possible to edit the **action** parameter of an inherited rule. If you have edited the action of an inherited rule, the rule is then displayed in red on the level where the action has been edited.

AutoPage Publication Planner | **Pagination Rules** | Page Inspector | Status | State L

Publication Section | Plan | Publication Planner | Plan Notes

Document level Section ending

Object Layout

Condition	Action	Defined At
If the Object Type is "Section"	Use product template TocIndex	Zeta Tools
Default condition	Use product template Price Table Product Template	Toolboxes

Add Rule

A complete rule group can also be overridden manually in cases where you want to change the rule **conditions** or rules in general. When the rules within a rule group are overridden, they are displayed in green.

AutoPage Publication Planner | **Pagination Rules** | Page Inspector | Status | State Log

Publication Section | Plan | Publication Planner | Plan Notes | Fir

Document level Section ending

Object Layout

Condition	Action	Defined At
If the Object Type is Section	Use product template TocIndex	Toolboxes
Default condition	Use product template Main Product Template	Toolboxes

Add Rule

Important: All rules within a pagination rule group are affected when you create a local rule. If you make changes to a rule at the topmost publication level after you have created the local rule, the changes are not inherited. However, if only the *actions* are changed on the inherited rules, then only the edited rule turns red and this will not break the inheritance of the entire group rule.

If you want to get rid of the local values, you can remove all the rules one-by-one. After all the local rules within a pagination rule group have been deleted, all rules will be inherited again.

Pagination Rule Evaluation

Pagination rules are evaluated one-by-one in the list from top to bottom. When the condition of a rule evaluates to `True`, the associated action is then evaluated. The layout of a page is decided by the sum of all conditions with actions that evaluate to true. The order of evaluation means that one action can override an action associated with a rule further down in the list. Therefore, you should always specify the rule with the more general rule first and the most specific rule last.

The order of the pagination rules can be changed by using drag and drop.

Example: Layout Rules

- Condition = always, Action = Use product template = template1
- Condition = objectType is OT1, Action = Use product template = template2

When an object is paginated with object Type OT2, then the first condition *Always* evaluates to **True** and the rule assigns the product template *template1* to the product. The condition of the second rule (*objectType is OT1*) evaluates to **False**, and the action of the second rule is therefore not used.

However, if you paginate an object with object Type OT1, the first condition is still **True** and the rule assigns the product template *template1* to the object. The second condition also evaluates to **True** and the action for the rule then assigns the product template *template2* to the object and then overwrites the assignment done by the first rule.

To Change the Evaluation Order of Pagination Rules

Click the rule you want to move, then drag and drop it to its new position in the list.

AutoPage Pagination Rule Conditions

Several conditions are available when setting up pagination rules. Conditions affect which actions are taken on objects as they are placed onto autopaginated pages. This topic provides an overview of what **conditions** are available for AutoPage pagination rules and which rule groups contain which conditions.

List and Description of AutoPage Pagination Rule Conditions

Default condition

The rule is always applied. There are no specific conditions that must be met.

If first in section

The rule is applied if the object is the first object in the section specified in the condition.

If first in publication

This condition is only available within the 'Repeat rules' pagination rule group. This rule is applied if the object is the first object in the publication specified in the condition.

If the Object Type is

The rule is applied if the object is of the same object type as specified in the condition.

If the Object is

The rule is applied if the object is the same as the object specified in the condition.

If the product attribute LOV value equals

The rule is applied if the LOV value ID or the LOV value of the product attribute value is the same as the value specified in the condition. The rule matches first on ID and second on value, which allows for matching on values from LOVs that do not use value IDs.

Note the following considerations for this condition:

- It is only valid for LOV-based attributes
- It does not apply to multi-valued attribute values. I.e., if the value specified in the condition is 'red' and a multi-valued attribute has two values, 'red' and 'blue,' the condition will not match. The value must be exactly as specified, and not a partial match.

If the product attribute value equals

The rule is applied if the product attribute value is the same as the value specified in the condition.

Note that this condition does not apply to multi-valued attribute values. I.e., if the value specified in the condition is 'red' and a multi-valued attribute has two values, 'red' and 'blue,' the condition will not match. The value must be exactly as specified, and not a partial match.

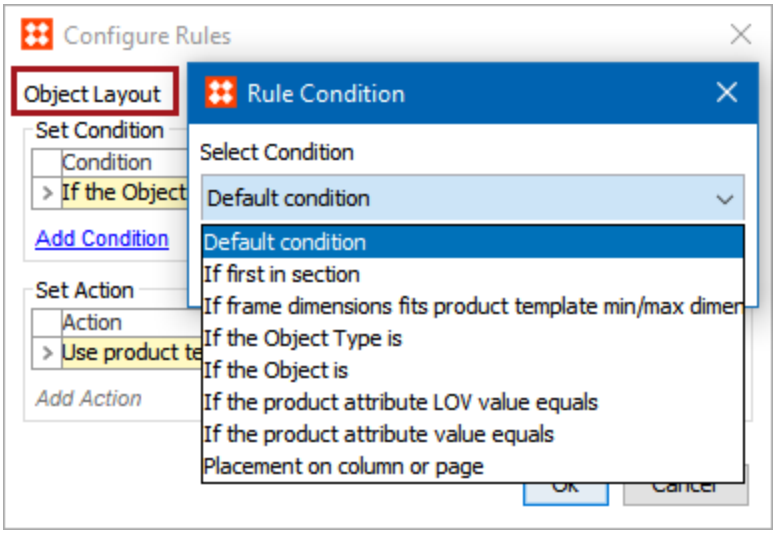
Placement on column or page

The rule is applied if the object is to be paginated in one of the following areas.

- After previous (following the previously paginated object)
- At top of next column
- At top of next page
- At top of next left page
- At top of next right page
- At top of new document
- At top of new document on left page
- At top of new document on right page

Availability of AutoPage Pagination Rule Conditions

Each pagination rule group has a different set of conditions that apply to its usage. For example, the Object Layout pagination rule group contains the following conditions:



All conditions are not available for all action groups. The following table describes the pagination rule **conditions** available in AutoPage and which pagination rule groups they are available in.

Action Group	Conditions							
	Default condition	If first in section	If first in publication	If the Object Type is	If the Object is	If the product attribute value equals	If the product attribute LOV value contains	Placement on column or page
Column handling	X	X		X	X	X	X	X
Document level Section ending	X							
Execute script	X	X		X	X	X	X	X
Minimum split size	X			X	X	X	X	
Object Layout	X	X		X	X	X	X	X
Position Rules	X	X		X	X	X	X	X
Repeat rules	X	X	X	X	X	X	X	X
Set Minimum Pages Per Document	X	X		X	X	X	X	
Set Publication Spread Index	X	X		X		X	X	X
Use	X	X		X	X	X	X	

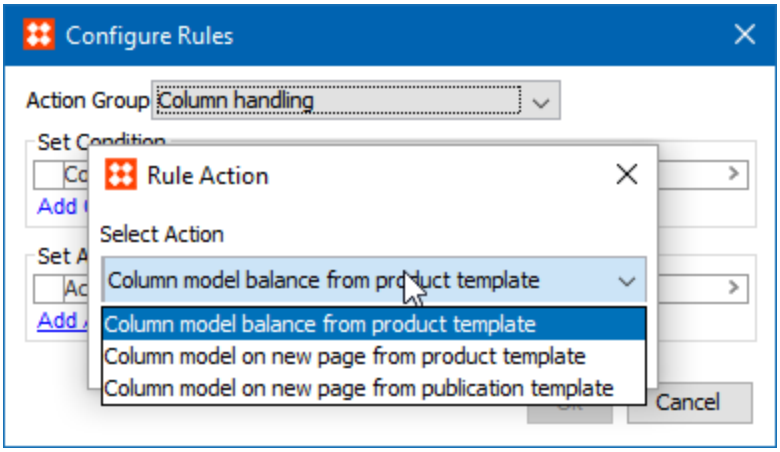
Action Group	Conditions							
	Default condition	If first in section	If first in publication	If the Object Type is	If the Object is	If the product attribute value equals	If the product attribute LOV value contains	Placement on column or page
Continuation Notes								
Use Vertical Alignment	X	X		X	X	X	X	
Using gap	X	X		X	X	X	X	X

AutoPage Pagination Rule Actions

For each AutoPage pagination rule group, a number of actions are available. This topic provides an overview of what **Action Groups** are available within each pagination rule group and what their functions are.

Column handling

Column handling rules 'handle' how mounted objects are placed into columns across an individual page or across multiple pages.



Column model balance from product template

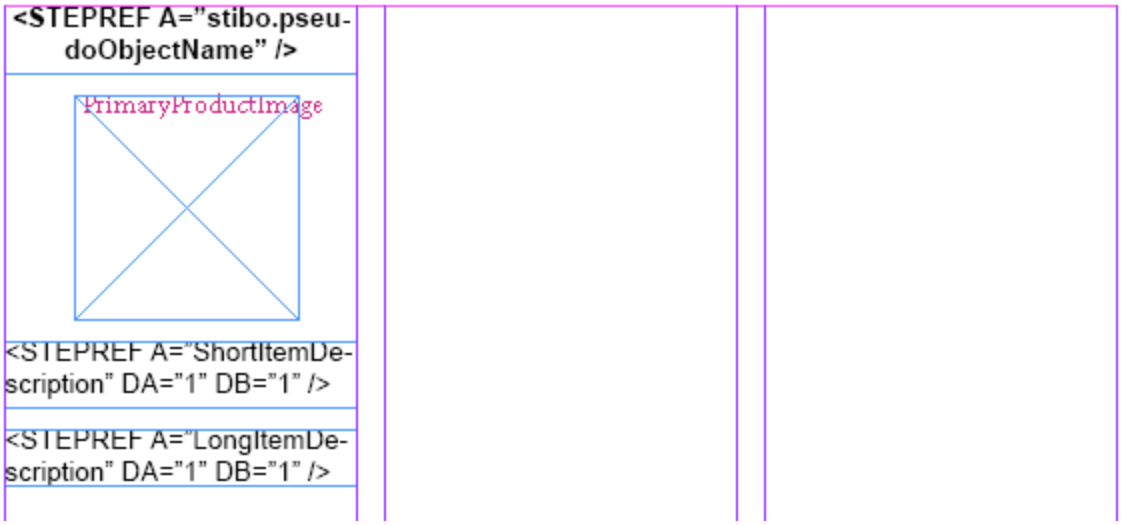
Column handling		
Condition	Action	Defined At
Default condition	Column model balance from product template using gap 0.04 inches	Beta Tools

Use Case #1

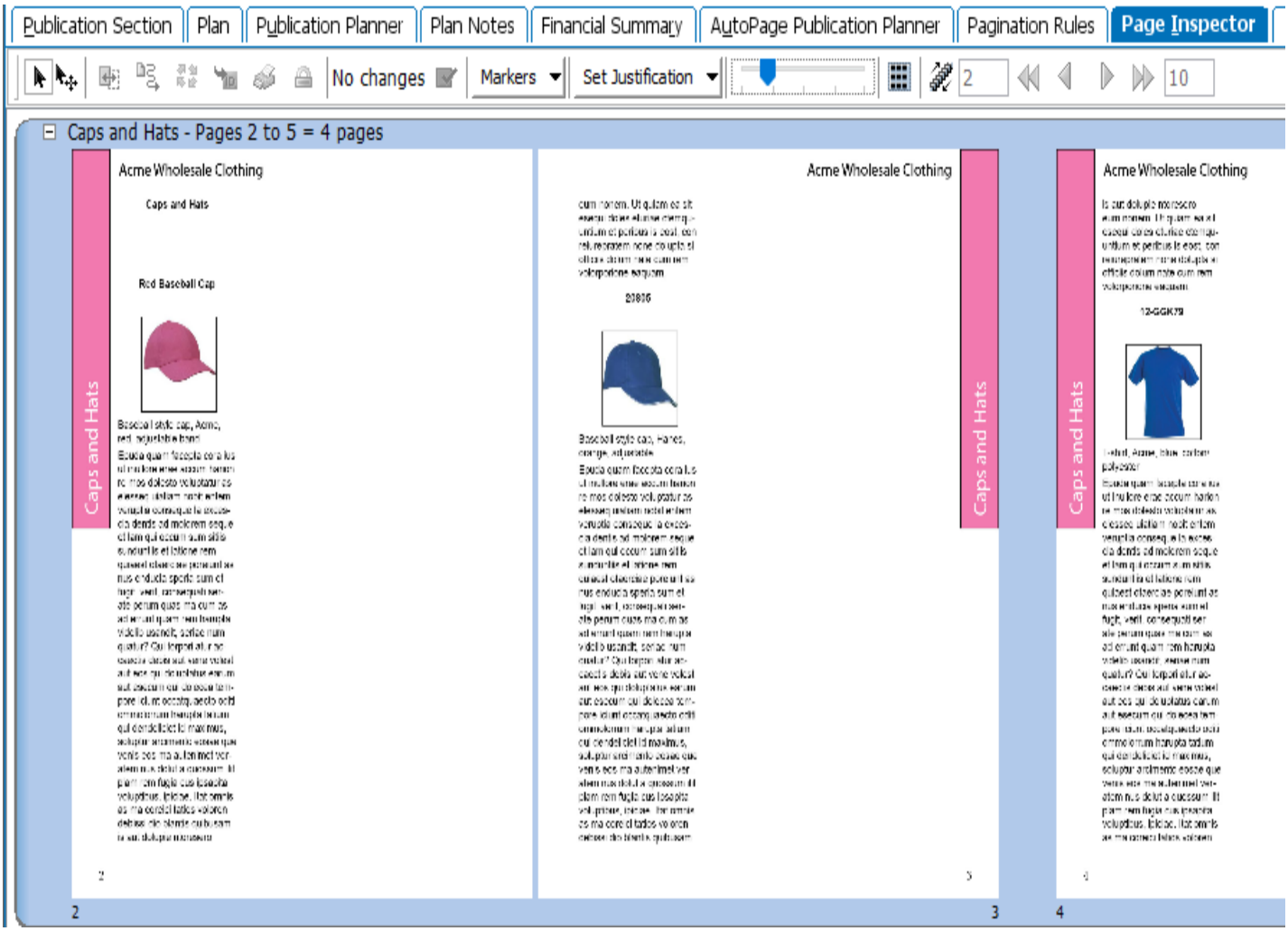
If the publication template does not have any columns set up, but the product template in use *does*, then products will flow across the page based on the width of columns in the product template instead of mounting vertically from top to bottom of the page.

To illustrate, the below screenshot shows a portion of a publication template without any columns:

Products for this example will be mounted using a product template with three columns.



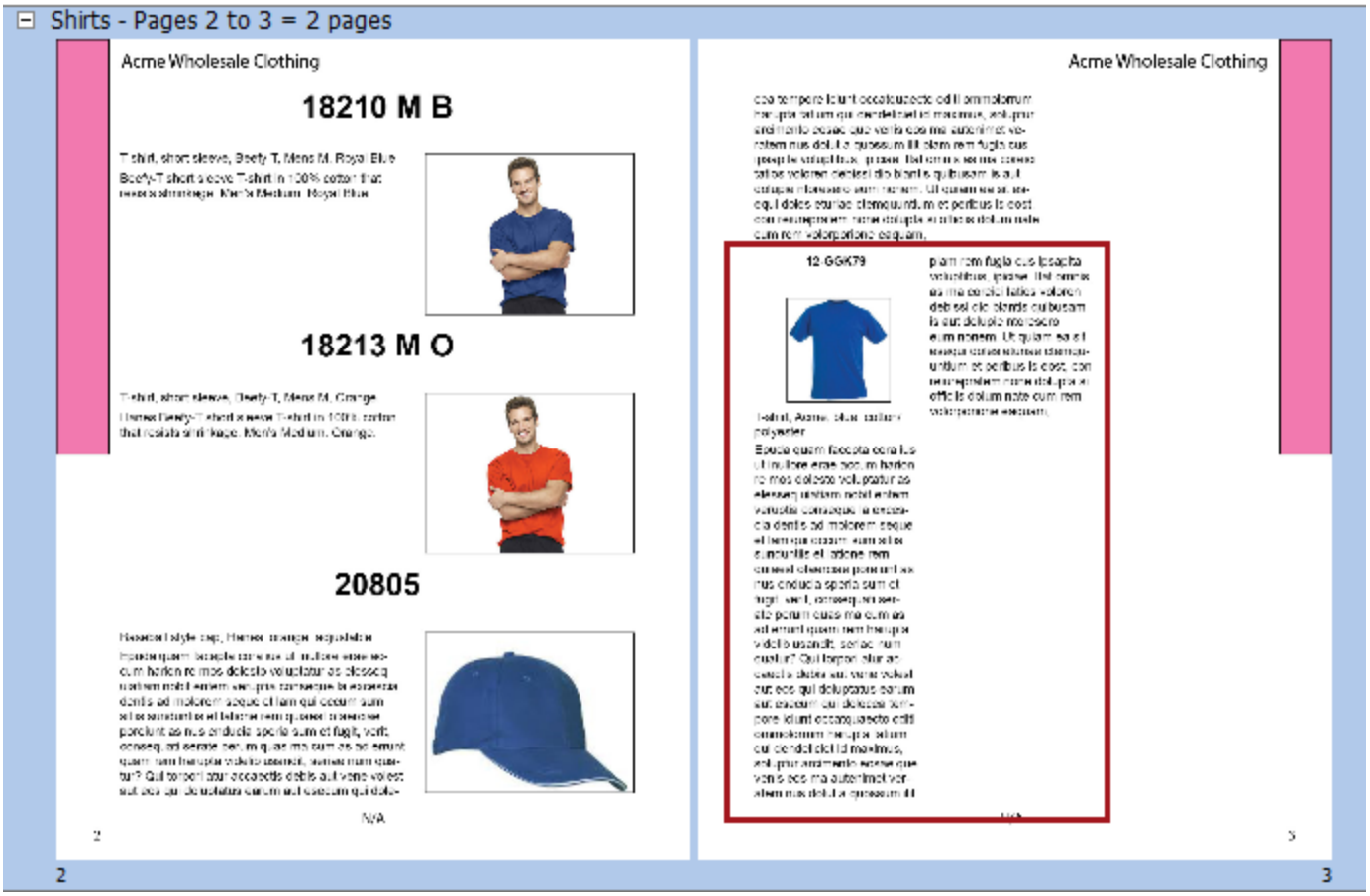
Without using this pagination rule, a selection of three products mounted using this three-column template will paginate as pictured in the following screenshot—each product will mount into the column, but split onto a new page once the column is filled.



With the rule applied, the products will instead flow to the next column, using the column widths from the product template.

Use Case #2

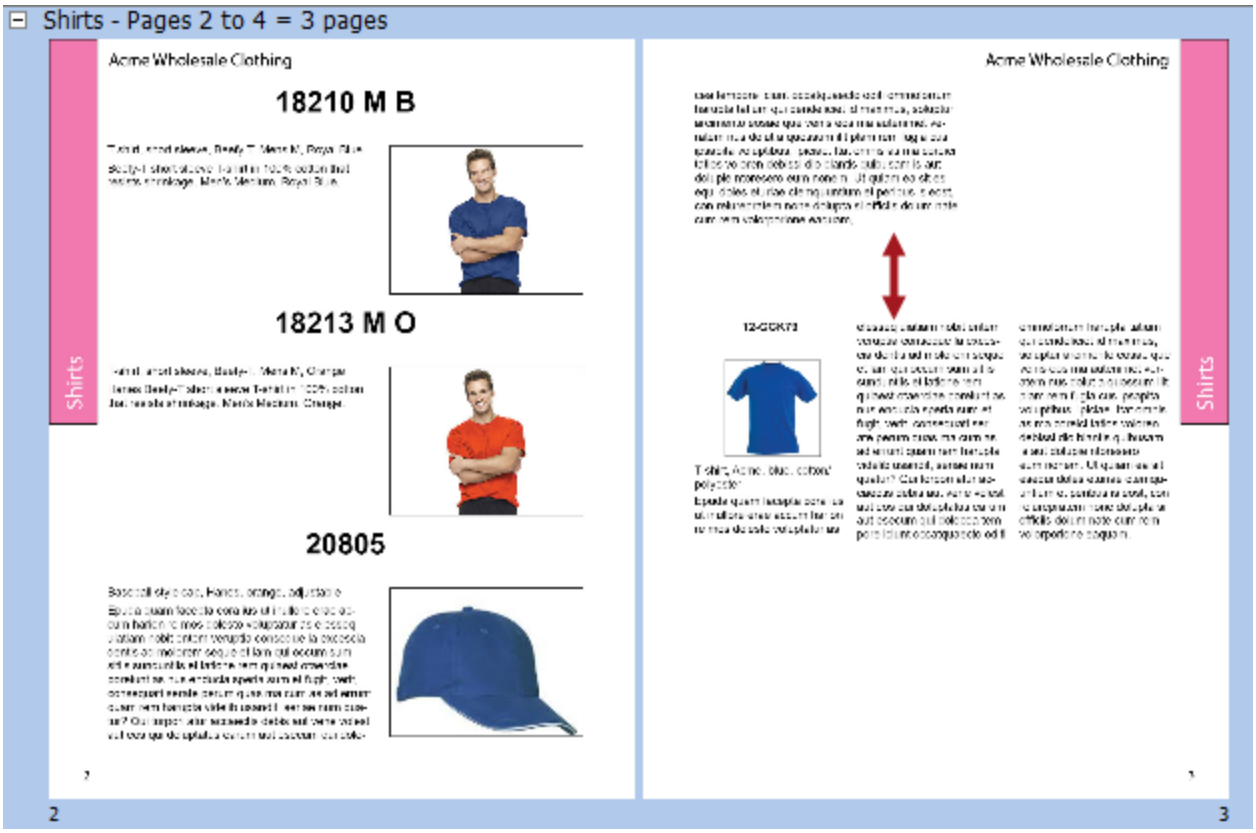
If multiple products are mounted and a product using a column-based product template is mounted immediately after products that are mounted using product templates without columns, the product(s) mounted with the column-based product template will wrap around to the next column instead of splitting across to the next page.



'Using Gap'

Column handling	
Condition	Action
Default condition	Column model balance from product template using gap 1.18 inches

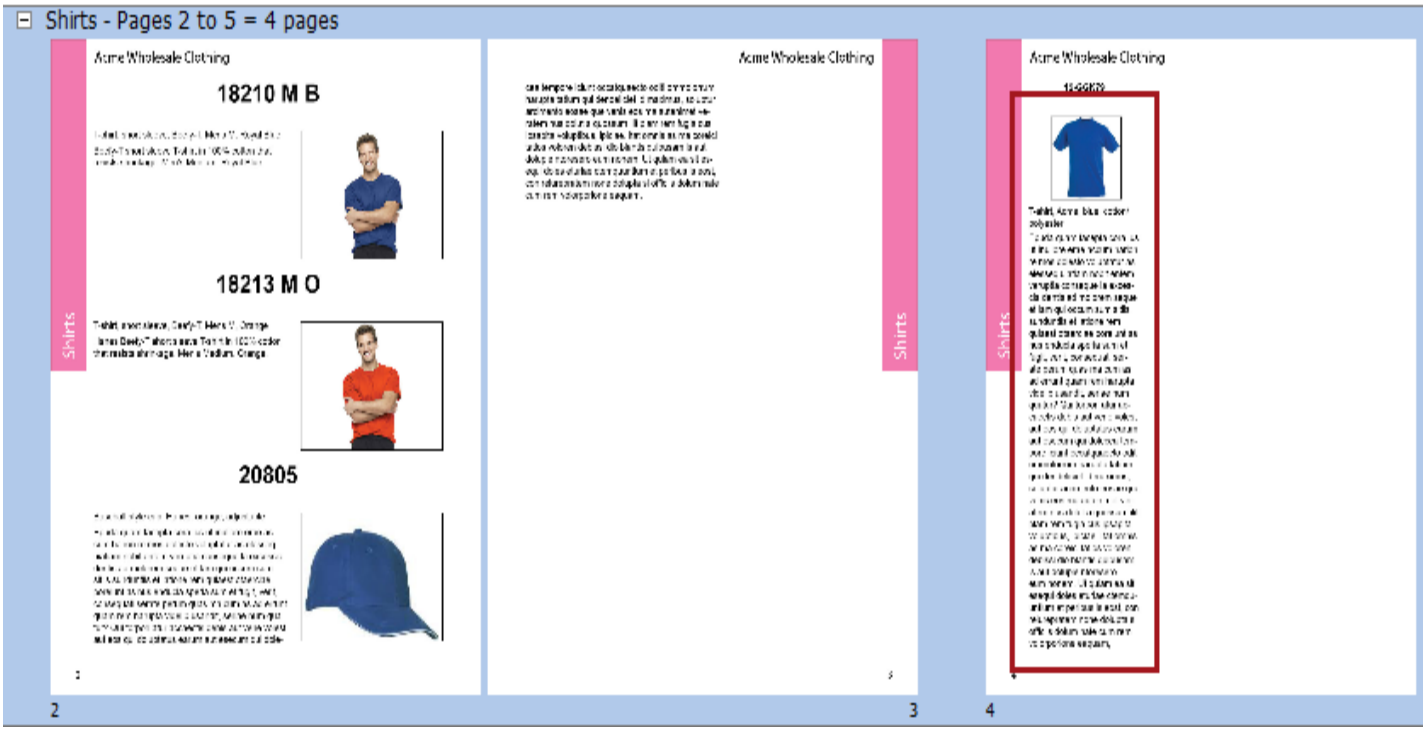
When setting up the 'Column model balance from product template' rule, there is an additional setting where a gap value can be added. This gap sets the space between the product(s) mounted using a non-column template and the product(s) mounted using the column-based template. (Note that this gap value does not set the space between columns, which is picked up from the gutter space between the columns on the product template.)



Column model on new page from product template

Column handling		
Condition	Action	Defined At
Default condition	Column model on new page from product template	Beta Tools

Selecting 'Column model on new page from product template' functions similarly to 'Column model balance from product template' except that the product mounted with the column-based product template will be automatically mounted on the next page.

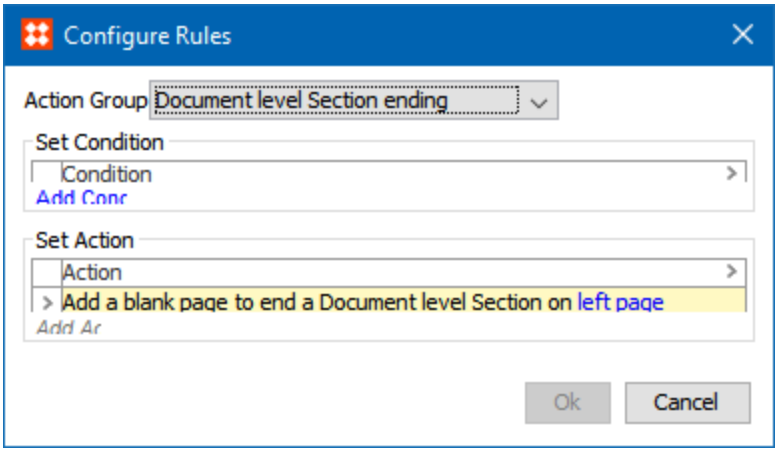


Column model on new page from publication template

Column handling		
Condition	Action	Defined At
Default condition	Column model on new page from publication template	Beta Tools

This rule serves as a way to 'revert' object mounting to default behavior, which is to mount objects according to the columns set on the publication template. When one of the two aforementioned 'column model balance from product template' actions is used ('Column model balance from product template' or 'Column model on new page from product template'), the default mounting behavior is overridden; the columns on the publication template are disregarded and objects are mounted according to the columns on the product template instead. So, to revert to default behavior, the action 'Column model on new page from publication template' would be used on a section or subsection as a way to override an inherited 'column model balance from product template' rule.

Document level Section ending



Add a blank page to end a Document level Section

There is only one action in this rule group, 'Add a blank page to end a Document level Section.' This rule specifies whether a document in a document-level section / subsection ends on a left or a right page. This action will always be set as a default condition.

If no products are available to mount on the final page, STEP will add a blank page, which will include 'furniture' (background elements) from the publication template. In some cases, a blank page may be needed at the end of a section to ensure that the next section starts on the correct side.

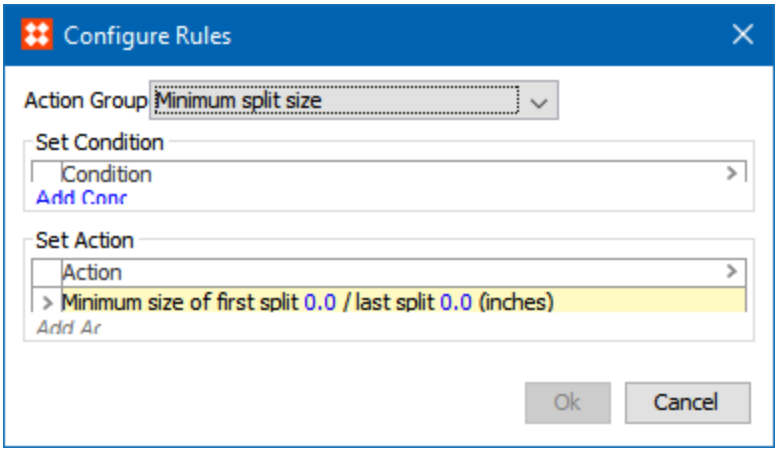
For example, add a blank page to end a Document level Section on <left page>.

Execute script

There is only one action in this rule group, 'Execute script.' This rule specifies which JavaScript should be executed when the specified condition is fulfilled. The JavaScript interacts with and customizes the mounting.

For example, execute script <name of script> when mounting objects.

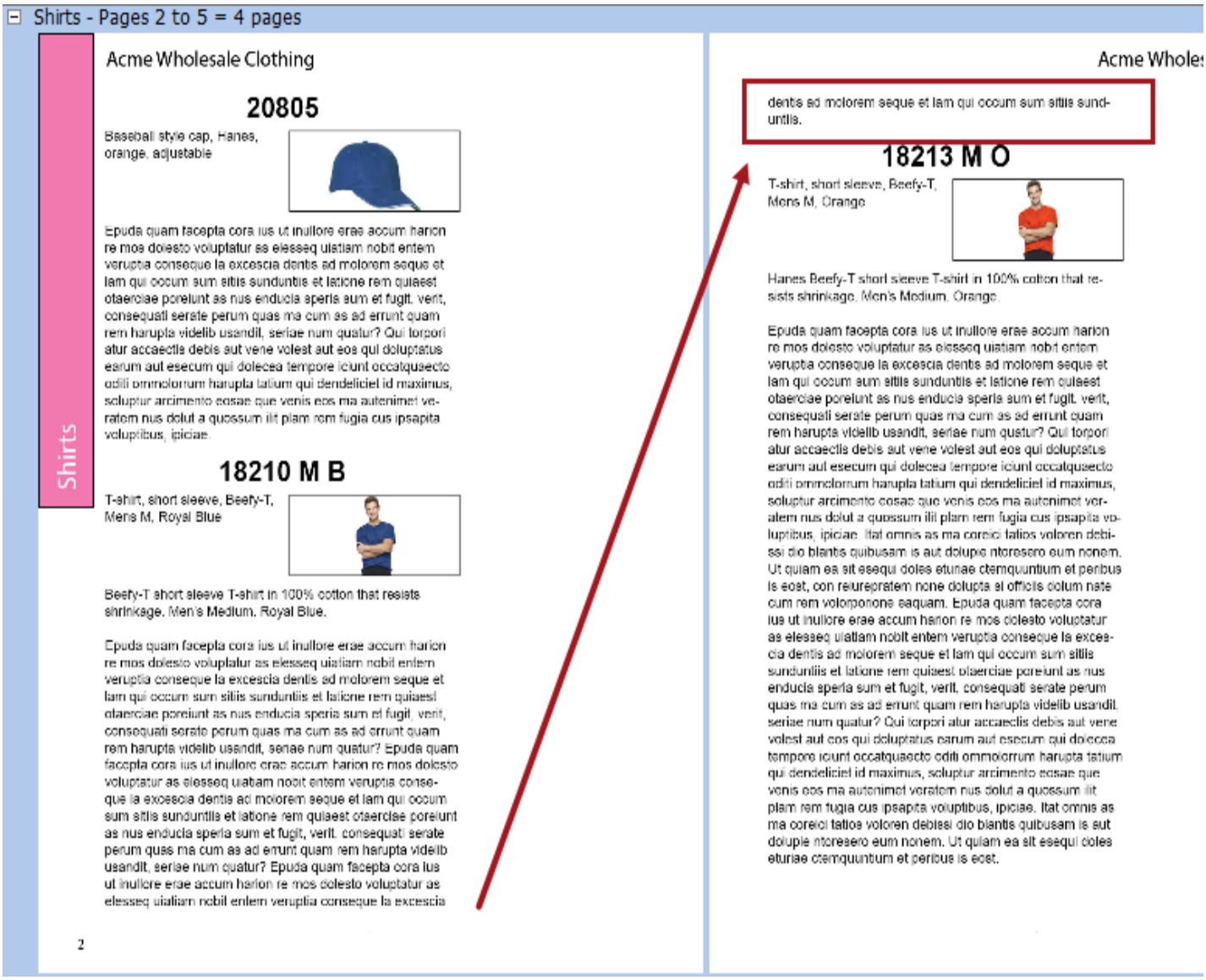
Minimum split size



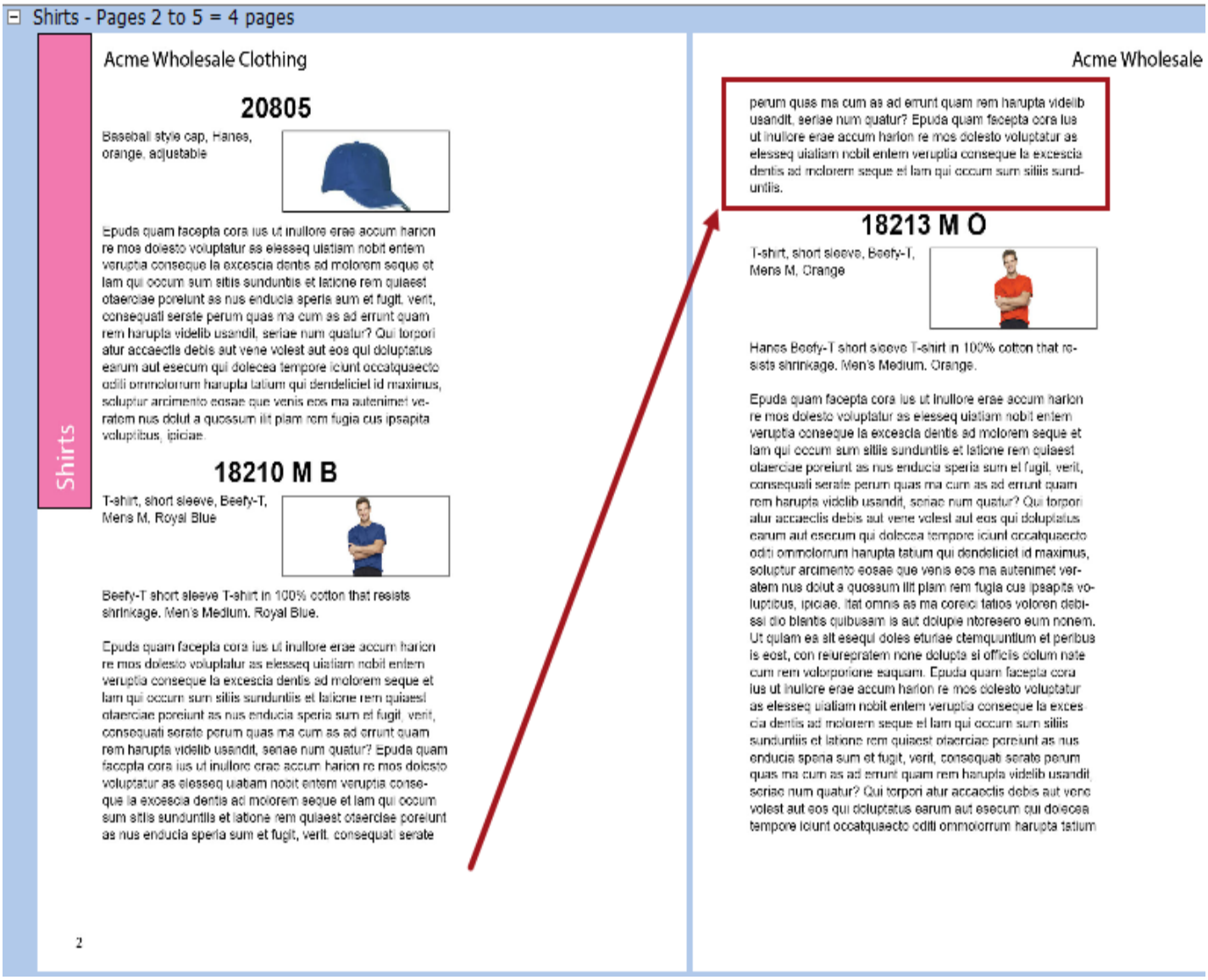
Minimum size of first split / last split

There is only one action in this rule group, 'Minimum size of first split / last split.' This rule controls where lengthy product presentations are split across columns and pages. Its purpose is to avoid situations where a single line or word (known as a *widow* in typography) flows to the next column or page when the rest of the product is on a previous column or page. This rule ensures that a minimum amount of copy splits over to the top of the next column or page. Note that the maximum amount that can be set for either split size (first and last) is 342 points (equivalent to 4.75 inches or 120.65 mm).

To illustrate, the following screenshot shows an example of a lengthy presentation *without* a minimum split rule applied. A dangling line (orphan) has wrapped to the top of the next page.



The following screenshots shows how the same presentation would split with a minimum split size of 1 inch, followed by an illustration of how the rule is configured in STEP. This example rule configuration ensures that at least 1 inch of copy will be rolled over to the top of the next column or page.



Minimum split size	
Condition	Action
Default condition	Minimum size of first split 1.0 / last split 1.0 (inches)

Add Rule

Object Layout

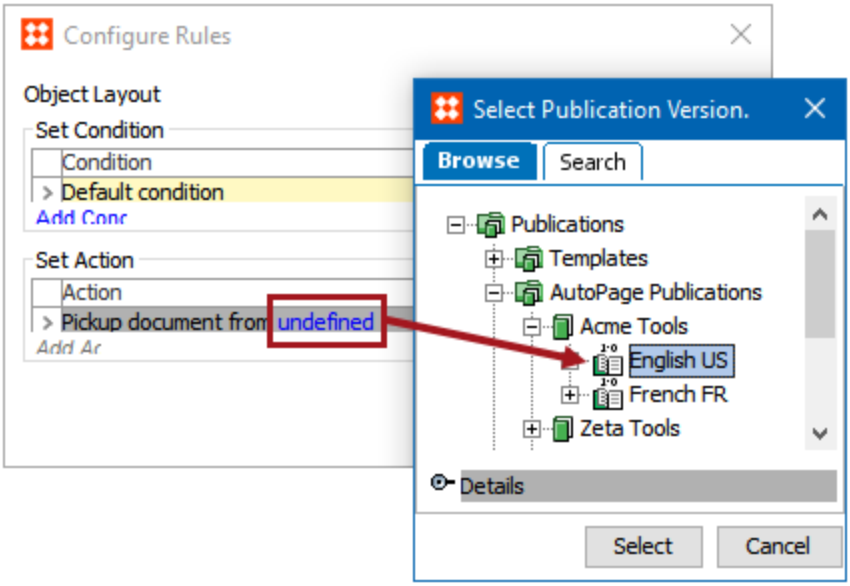
The object layout rules specify what product templates to apply to the objects being mounted.

Pickup document

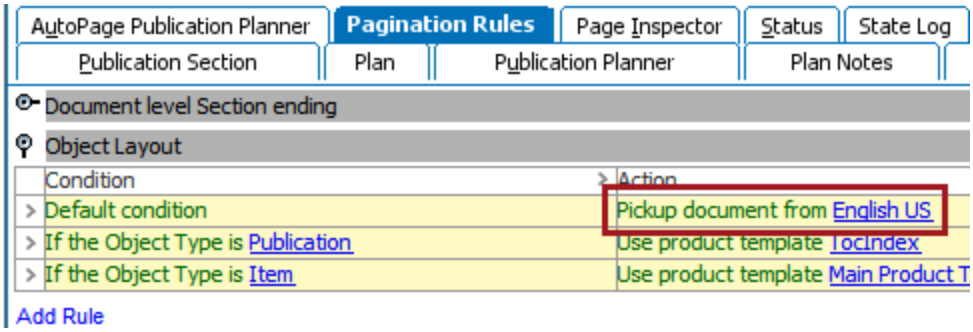
The pickup document option is used to reuse the layout(s) from a **version** of a specified preexisting publication when an object is mounted. When this rule is applied, the system will scan all actual pages within the chosen

publication version during autopagination, then use the layout that was applied to the object in that publication.

When adding the rule, the system prompts you to select the publication version from where it should take the layout, as shown in the below screenshot.

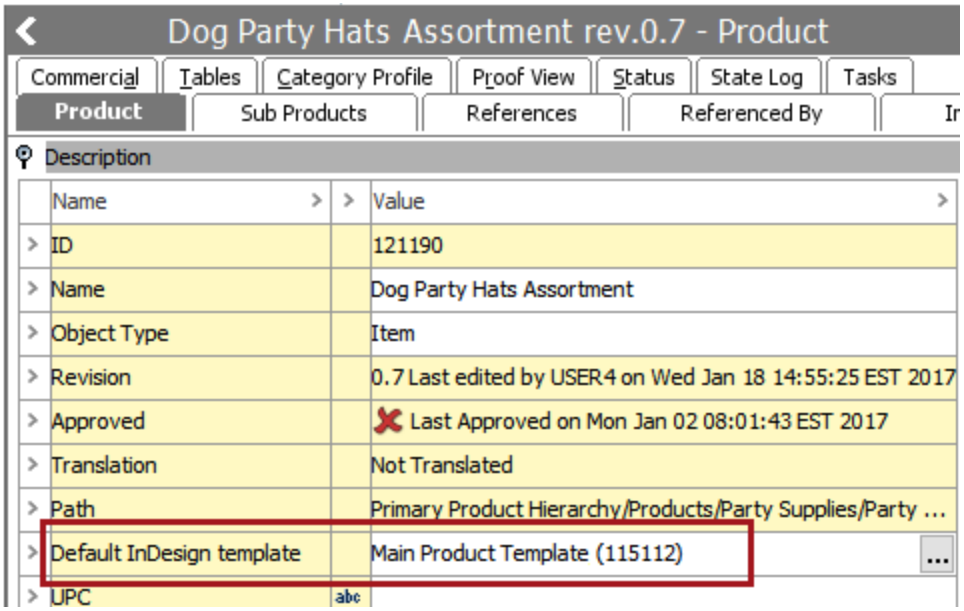


After the version is chosen, the rule will resemble the following:



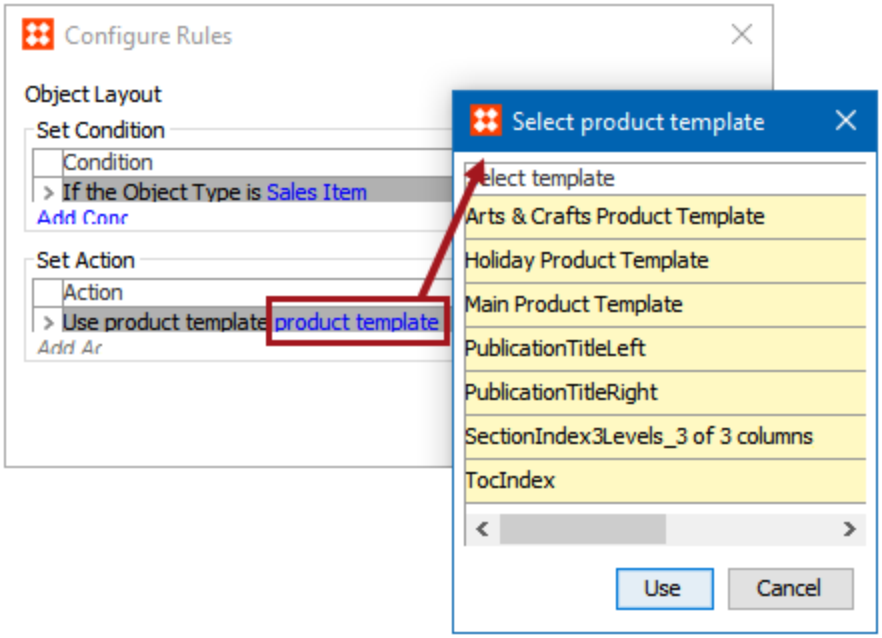
Use default product presentation

Uses the default product template (Default InDesign template) that has been assigned to the product. For more information, see the **Default InDesign Product Templates** topic in the **STEP'n'design** documentation.



Use product template

Uses a product layout from a specified product template. The list of product templates that display when the 'product template' hyperlink is clicked under 'Set Action' are the product templates applied to the publication on the **Publication** tab.



Examples

The following are examples of object layout rules and how they are evaluated:

- Rule 1: Always use the product template 'Acme Products'
- Rule 2: If the value of the 'Folder' attribute equals 'Folder Template,' then use the product template 'Folder Template.'
- Rule 3: If the product is of the object type 'Nice Family,' use the product template 'Nice Product Template.'

The rules are applied as follows:

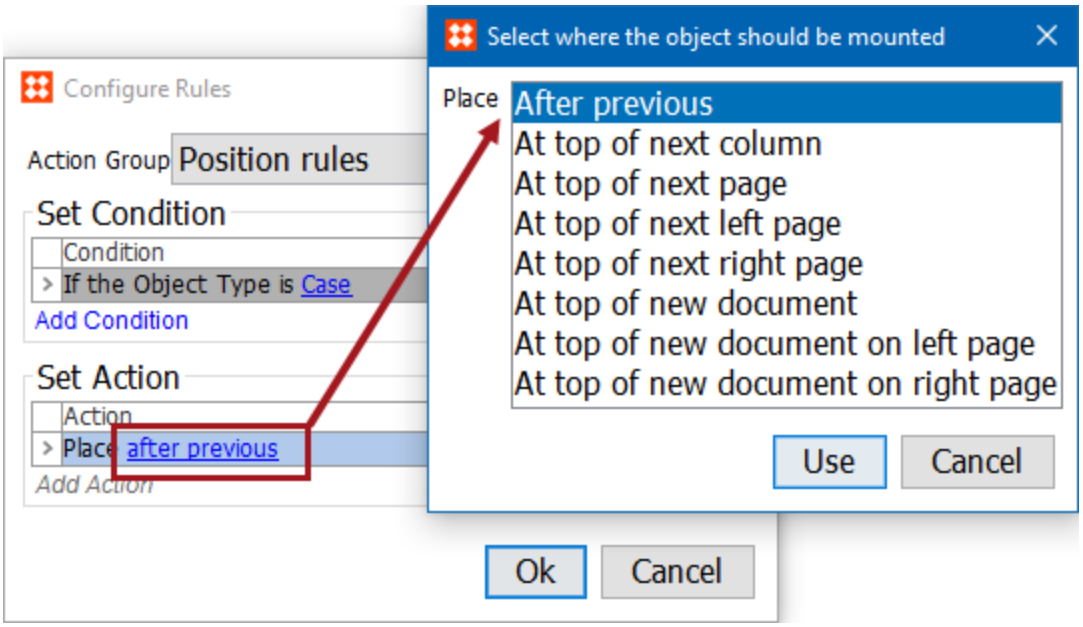
- A product that is not of the object type 'Nice Family' and does not have the attribute 'Folder' with the value of 'Folder Template' will be paginated using the 'Acme Products' product template according to rule 1.
- A product that is not of the object type 'Nice Family' but the value of the attribute 'Folder' is 'Folder Template' will be paginated using the product template 'Folder Template' according to rule 2.
- A product of the object type 'Nice Family' will be paginated using the product template 'Nice Product Template' according to rule 3.

Position Rules

Place

The actions available in the 'Position rules' group specify where to place objects on pages. The available options for 'Place' are:

- After previous (following the previously paginated object)
- At top of next column
- At top of next page
- At top of next left page
- At top of next right page
- At top of new document
- At top of new document on left page
- At top of new document on right page



For example:

- If the object type is product, then position at the top of the next column
- If the attribute value equals a specific value, then position the product at the top of the next page

Repeat rules

These actions specify the repeat rules for mounting publication and/or section objects themselves. If no rules are set up, no publications, sections, or subsections will be mounted during the autopagination process.

Repeat Publication

Specifies whether the publication should be mounted (and repeated, depending on the object layout rules that are set up for publications). For example, by mounting the publication, a table of contents that pulls the name of all sections in the publication can be placed at the beginning of the publication, or the STEP name and/or metadata (description) attribute values from the publication can be repeated throughout the publication.

Repeat Section

Specifies which section level to be mounted and repeated, depending on the object layout rules that are set up for sections. For example, a table of contents that pulls the name of all subsections in a section can be mounted at the beginning of each section, or the STEP name and/or metadata (description) attribute values from the section(s) can be repeated throughout the section(s).

For example, if first in section 1, then repeat section at level 1.

For more information on use cases for repeat rules, see the **Creating Tables of Contents in AutoPage** topic.

Set Minimum Pages Per Document

Set minimum pages per document

There is only one action in this rule group, 'Set minimum pages per document.' This rule specifies the minimum number of pages that a document must contain before AutoPage forces a new document to be made. The default is two pages per document, which is used if nothing is defined.

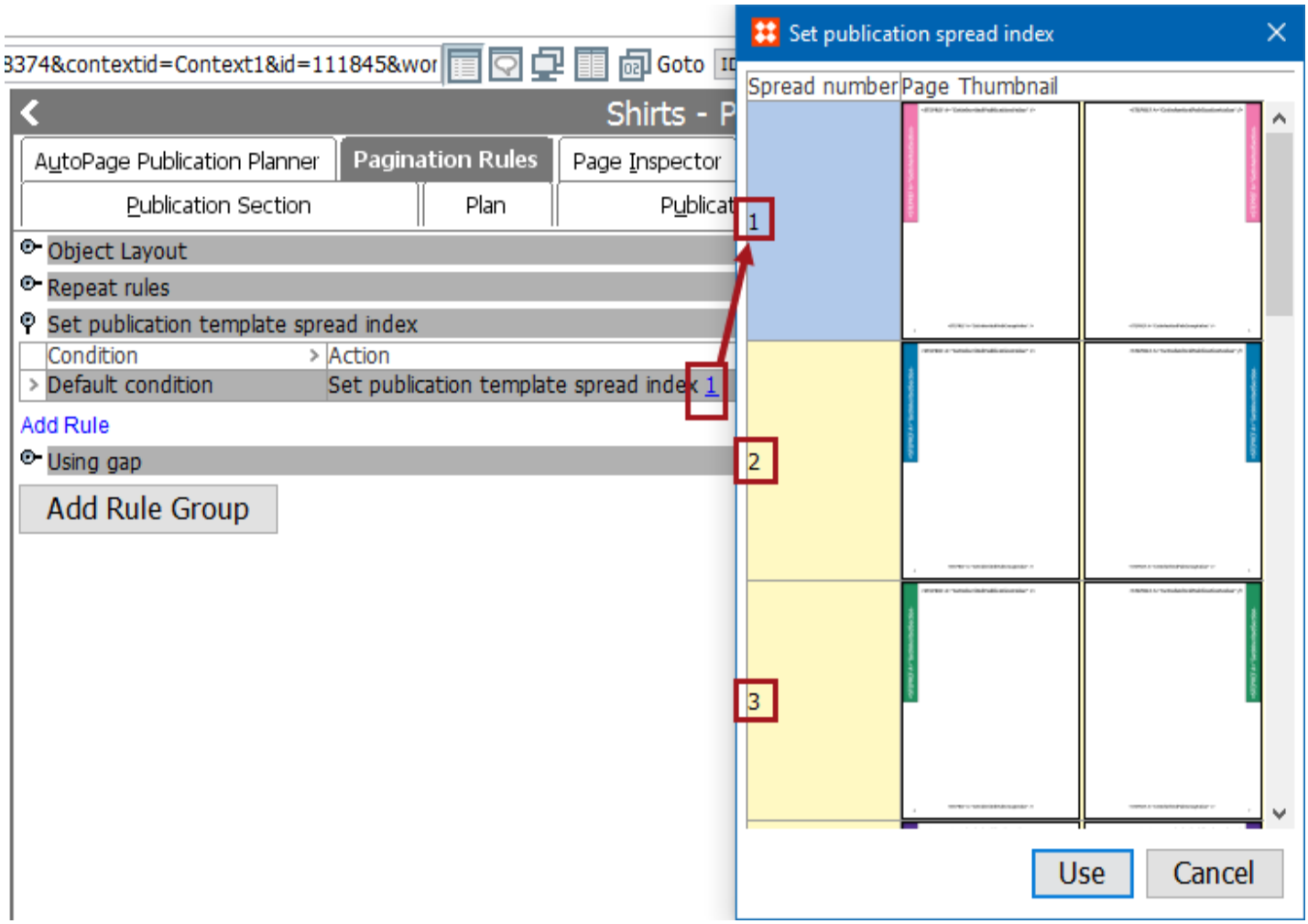
For example, always create a minimum of six pages within a document before AutoPage creates a new document.

Set Publication Spread Index

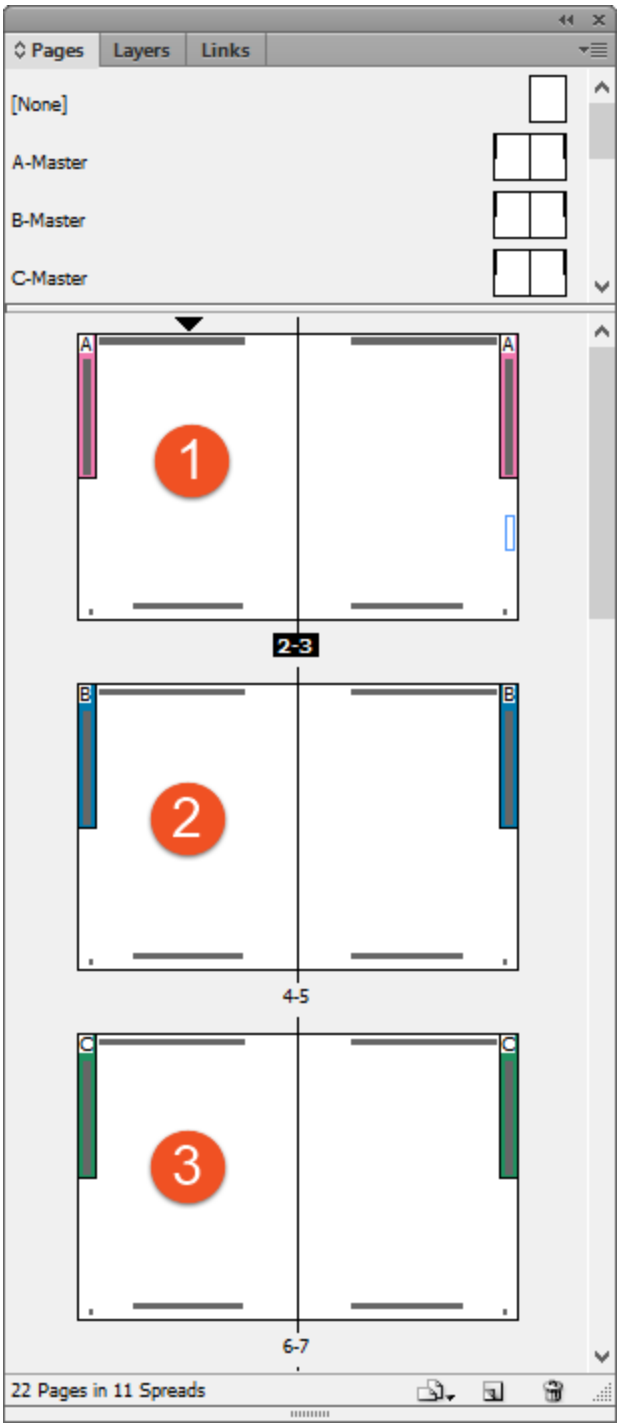
Set publication template spread index

There is only one action in this rule group, 'Set publication template spread index.' This rule specifies which spread within a publication template should be used when an object is paginated on the page. (A publication template often consists of several spreads, containing thumb tabs for each chapter.) A typical setup in InDesign would be as follows: a page spread created from master spread A would equal spread index number 1, a spread created from master spread B would equal index spread number 2, and so forth.

The following screenshot shows the view in the workbench when a publication template spread index is selected.



And, this screenshot shows the corresponding 'spread indexes' of the publication template in InDesign, as viewed from the **Pages** panel.



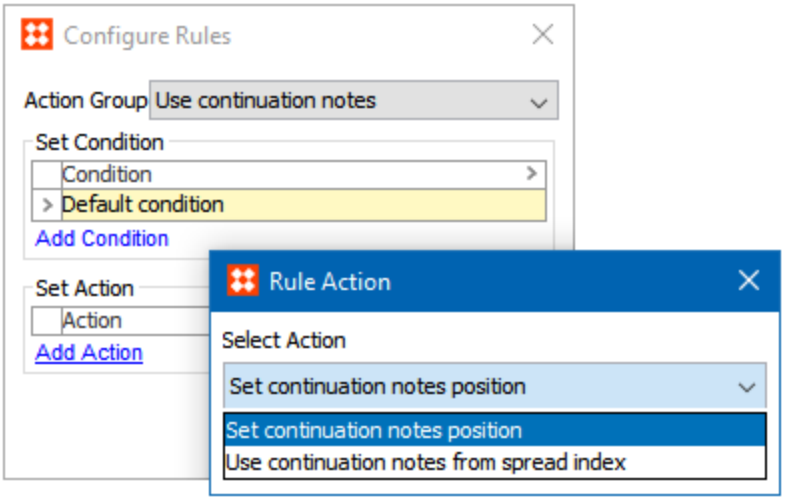
For example, always use publication template spread index number 1.

Use Continuation Notes

These actions specify the publication template spread number where continuation notes are defined and how continuation notes are going to be placed related to the split presentation. Continuation notes are used for longer

product presentations that will be split across multiple pages (for example, products that contain very lengthy tables). Wording such as 'Continued' can be placed at the bottom of the page(s) to inform readers that the presentation is continued on the following page(s).

For full details on how to configure and use continuation notes, see the **Using Continuation Notes** topic.

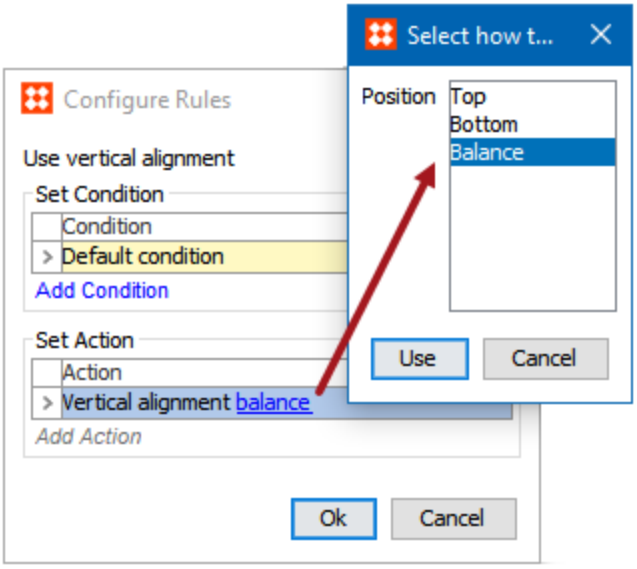


Use Vertical Alignment

Use vertical alignment

There is only one action in this rule group, 'Use vertical alignment.' This rule specifies how to justify objects on a page:

- Top
- Bottom
- Balance (space between objects is distributed evenly)



For example, always balance space between objects on a page.

Using gap

Using gap

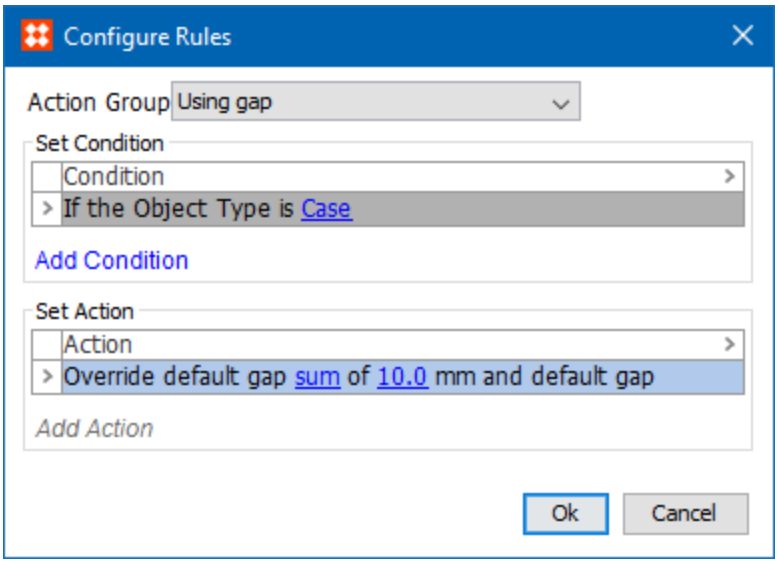
Specifies the distance between objects on a page.

For example, by default, place using gap of 10 mm between all objects on pages.

Override default gap

Overrides 'Using gap.' It can be defined as a sum of 'using gap' and the override gap or a minimum or maximum gap.

For example, if the object type is 'Case,' override the default gap of 10 mm and add an additional 10 mm (setup pictured in below screenshot).



Using Continuation Notes

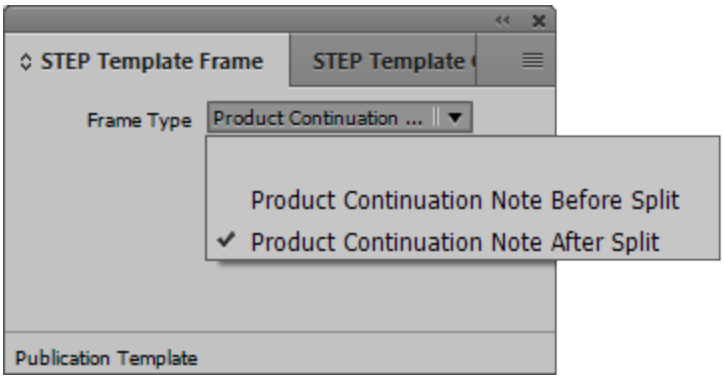
The 'Use Continuation Notes' pagination rule group contains actions that specify the following:

- The publication template spread number where continuation notes are defined
- How continuation notes will be placed related to the split presentation

Continuation notes are used for longer product presentations that are split across multiple pages, often for products that contain lengthy tables. Wording such as 'Continued on' and 'Continued from' can be placed at the bottom and top of the pages to inform readers that the presentation is continued.

Configuring Continuation Notes on the Publication Template

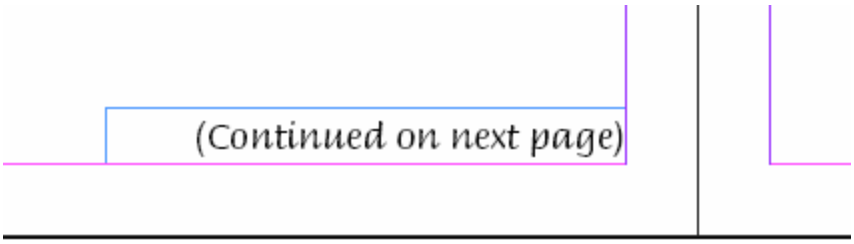
Continuation notes must be placed in a standalone master spread in the publication template. On this spread, the notes are placed into text frames that are configured with the **STEP Template Frame** palette. Two frame type options are available for product continuation notes: **Product Continuation Note Before Split** and **Product Continuation Note After Split**.



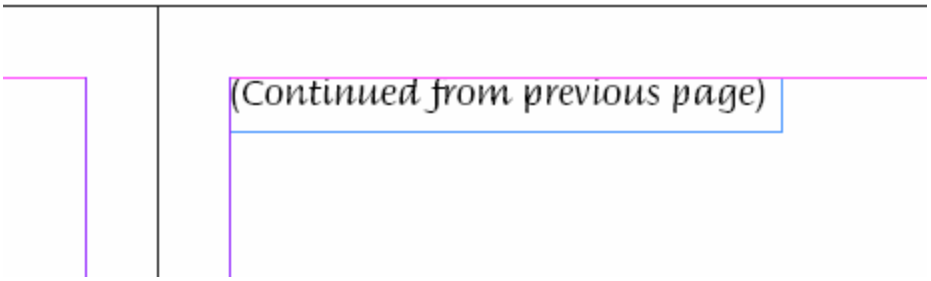
To set up continuation notes in the publication template, follow these steps:

1. If not already present, add a new master spread to the publication template that is dedicated to the continuation notes. This spread be added anywhere, but it is recommended to add it to the end of the template.
2. Draw a text frame at the bottom of the first page of the spread, then add the first continuation note. For example, '(Continued on next page)'.

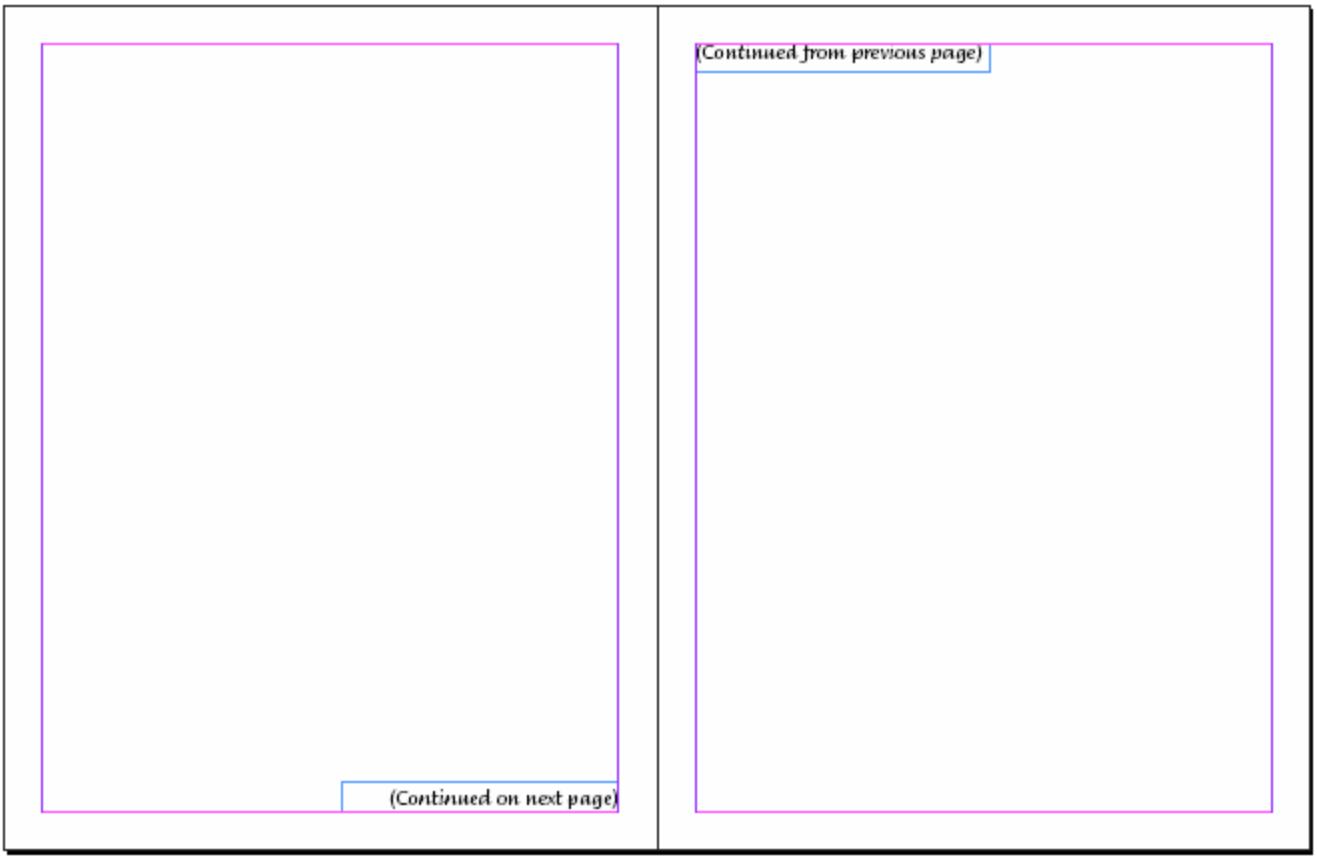
   Note: Continuation notes must be placed on the page spread(s), not the master spread(s).



3. Draw a text frame at the top of the second page and add the second continuation note. For example, '(Continued from previous page)'.

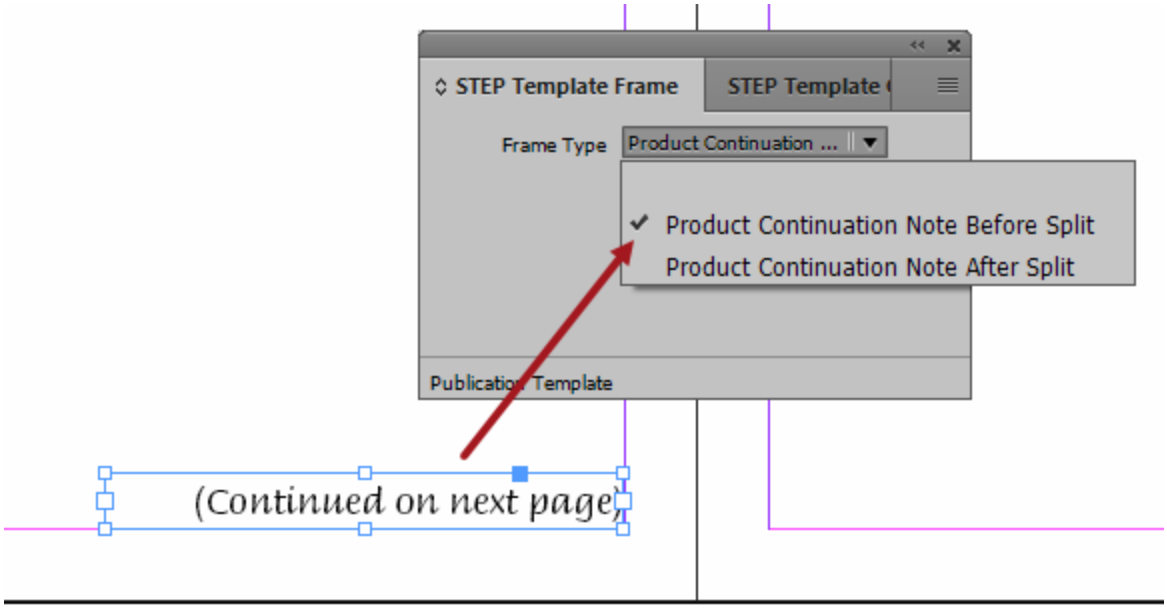


4. The spread will now resemble the following:

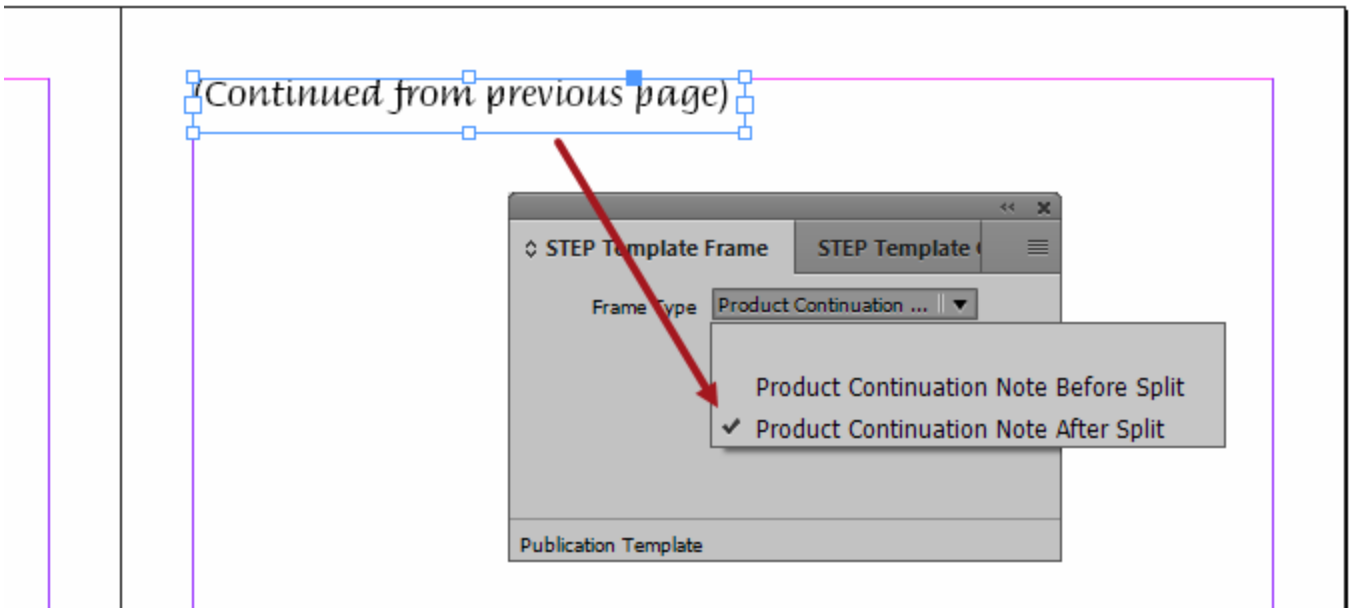


5. Select the text frame on the first page and open the **STEP Template Frame** palette. In the **Frame Type** dropdown, apply **Product Continuation Note Before Split**.

   The 'before split' option is always applied to the frame at the **bottom** of the page. This ensures that the 'continued on next page' note will be mounted below the split product presentation, letting readers know that the rest of the content (for example, a lengthy table) is on the next page.



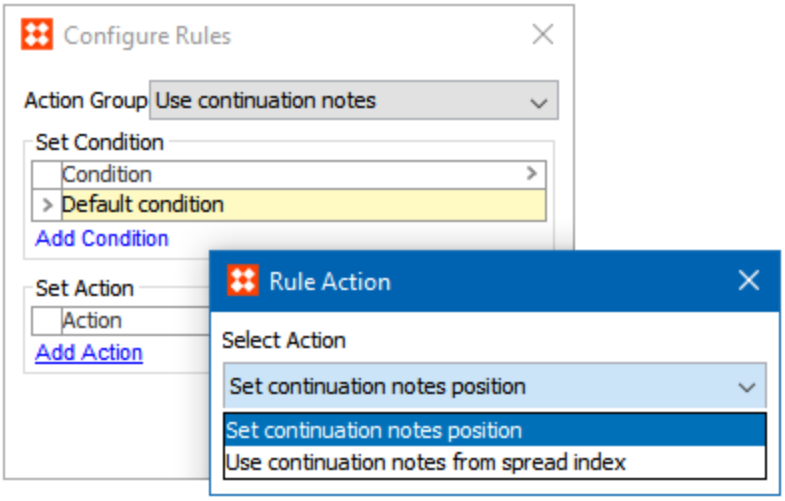
6. With the **STEP Template Frame** palette open, select the text frame on the second page and apply **Product Continuation Note After Split**. The 'after split' option is always applied to the frame located at the **top** of the page. This ensures that the 'continued from previous page' note will be mounted above the remainder of the split product presentation, letting readers know that the content is continued from the previous page.



7. Save the publication template back to STEP, then continue with the configuration of the continuation notes pagination rules.

Configuring Continuation Notes Rules in the AutoPage Publication Planner

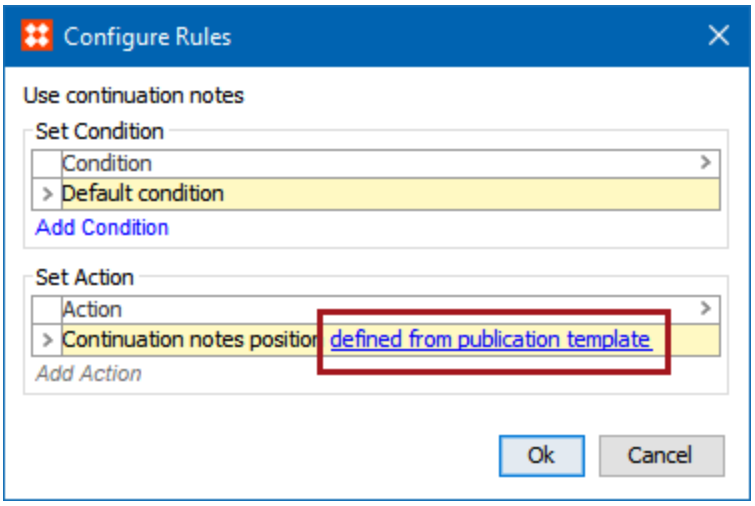
Two actions are available in the 'Use continuation notes' action group—**Set continuation notes position** and **Use continuation notes from spread index**. 'Default condition' is the most frequently used *condition*. Both actions must be configured to mount continuation notes, since the system first needs to know where to place the notes and, second, where to obtain the text.



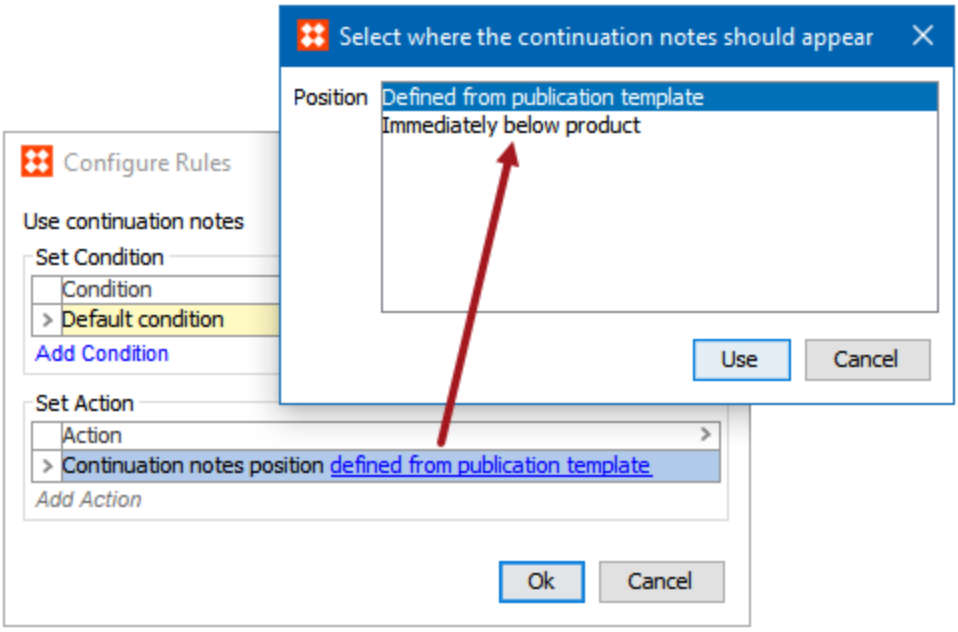
Set continuation notes position

The continuation notes can positioned in the exact location they appear in the publication template, or they can be placed immediately below the first part of the product's split.

1. When 'Set continuation notes position' is selected, the displayed action text is 'Continuation notes position defined from publication template,' which is the default.



2. Click on the hyperlinked 'defined from publication template' text to display the 'Select where the continuation notes should appear' dialog. The available Position options are **Defined from publication template** (default) and **Immediately below product**.

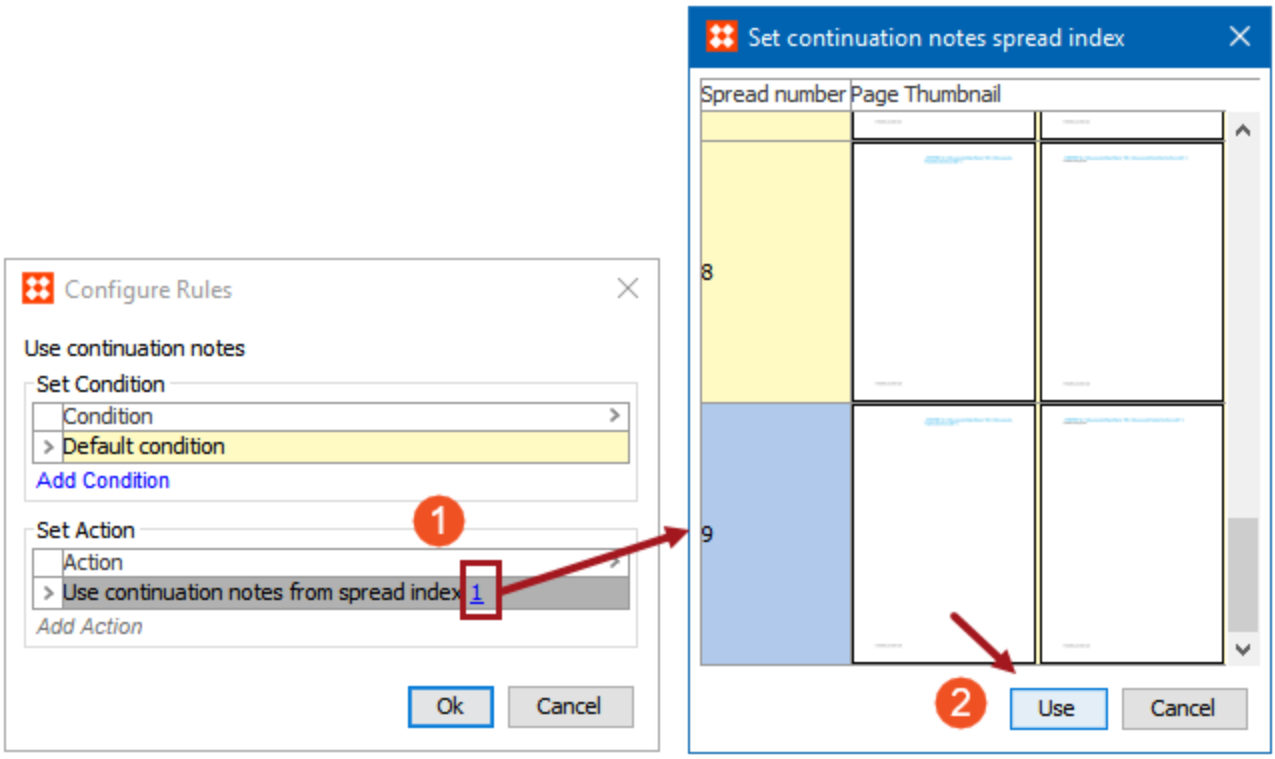


- Choose **Defined from publication template** to have the continuation notes mount in the exact position where they appear in the publication template. For example, the notes will always display at the bottom-right corner of the page even if there is blank space below the split product presentation.
- Choose **Immediately below product** to have the continuation notes mount directly below the split product presentation, even if there is blank space. Even if this option is chosen, the publication template spread index must still be defined from where to pull the continuation notes.

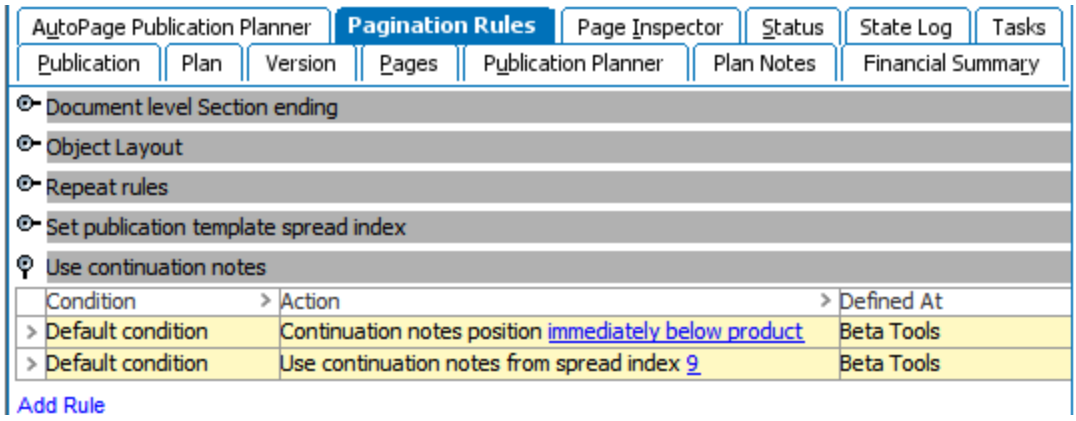
Use continuation notes from spread index

This option tells the system which spread of the publication template contains the continuation note(s).

1. When 'Use continuation notes from spread index' is selected as the action, the action text will include the hyperlinked number '1.' Click on this number to display the **Set continuation notes spread index** dialog.
2. Select the spread that contains the continuation notes, then click **Use**.



3. The configured continuation notes will resemble one of the following:



AutoPage Publication Planner | **Pagination Rules** | Page Inspector | Status | State Log | Tasks

Publication | Plan | Version | Pages | Publication Planner | Plan Notes | Financial Summary

Document level Section ending

Object Layout

Repeat rules

Set publication template spread index

Use continuation notes

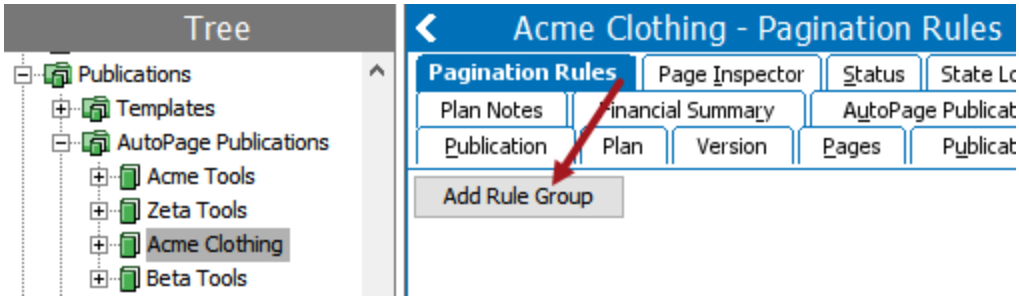
Condition	Action	Defined At
Default condition	Continuation notes position defined from publication template	Beta Tools
Default condition	Use continuation notes from spread index 9	Beta Tools

Add Rule

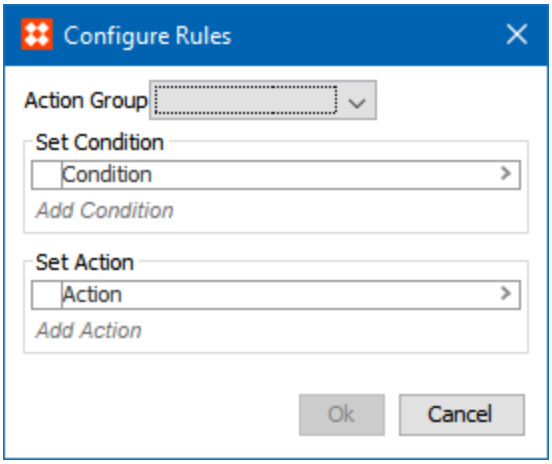
Adding Pagination Rules in AutoPage

To add a pagination rule, use the following steps.

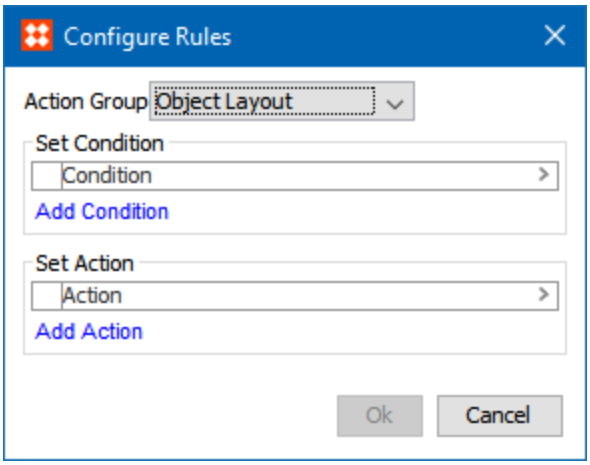
1. In the Tree, select the publication, section, or subsection where you want to add the pagination rule.
2. Go to the Pagination Rules tab and click **Add Rule Group**. The Rule Group determines which conditions and actions are available.



3. The **Configure Rules** dialog displays.

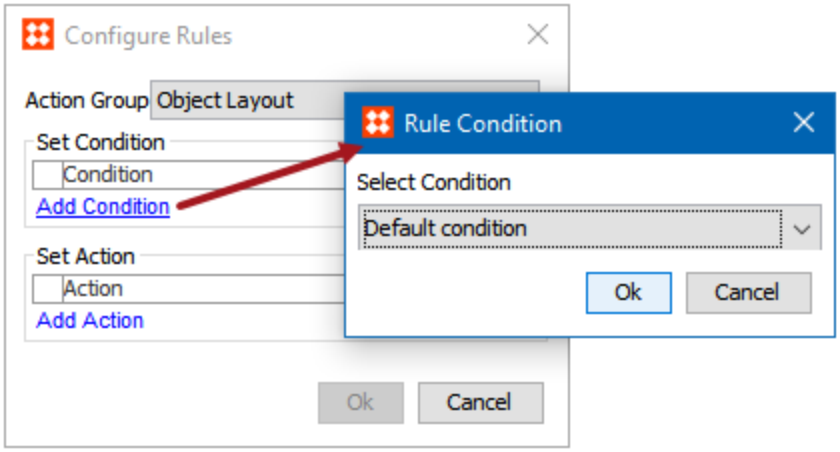


4. From the **Action Group** dropdown list, select the rule group that you want to apply (for example, 'Object Layout'). Once an action group is selected, the 'Add Condition' and 'Add Action' hyperlinks are activated.

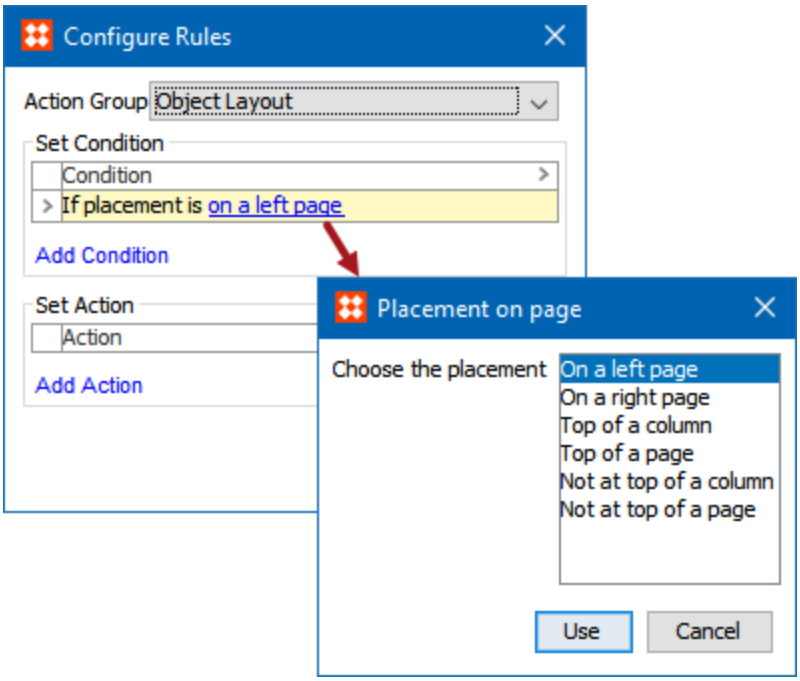


5. Under Set Condition, click **Add Condition** to display the 'Rule Condition' dialog. Choose the relevant condition(s) from the **Select Condition** dropdown list, then click **OK**.

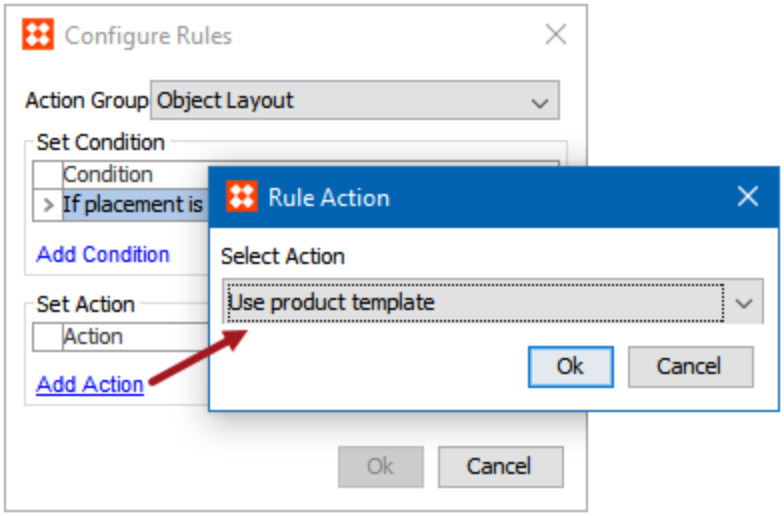
Note: You can add as many conditions as needed but you can only add one action.



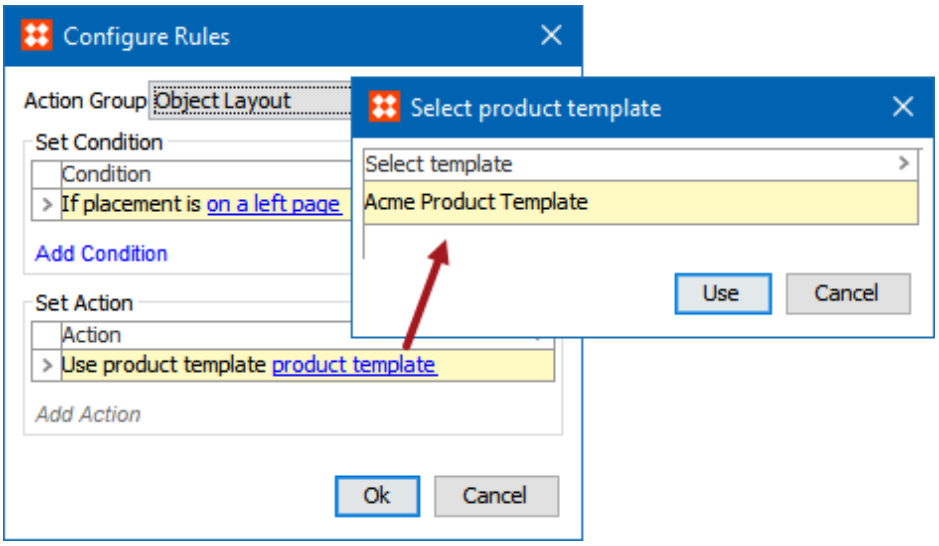
6. Some conditions can be limited further. Click the hyperlinked text within the condition (if applicable) to enter the additional criteria that determine when the condition should be applied.



7. Under Set Action, click **Add Action** to display the 'Rule Action' dialog. Choose the relevant action from the **Select Action** dropdown list, then click **OK**.



8. Some actions can be limited further. Click the hyperlinked text within the action (if applicable) to enter the criteria that further define the action.



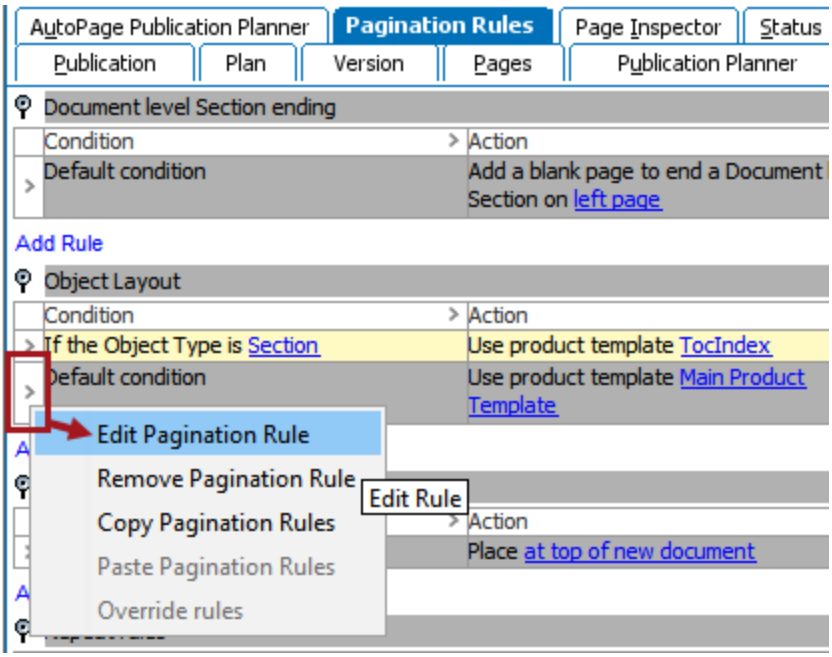
9. Click **OK** to add the rule.

Editing AutoPage Pagination Rules

Both local and inherited pagination rules can be edited. On local rules, you can change both conditions and actions. On inherited rules, you can only change the actions.

Edit Pagination Rules

1. In the Tree, locate the publication, section, or subsection that contains the rule(s) you want to edit.
2. On the **Pagination Rules** tab, right-click on the small arrow icon next to the rule you want to edit, then choose **Edit Pagination Rule**.

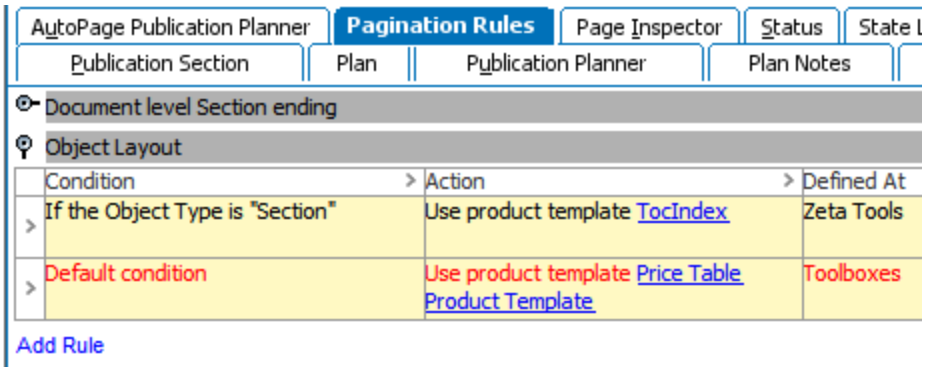


3. In the **Configure Rules** dialog, make the desired changes, then click **OK**.

Editing Inherited Actions

If you have changed the *action* on an inherited rule, it displays in red on the Pagination Rules tab.

Note: You cannot *add* or *remove* actions from inherited rules.



Editing Inherited Conditions

You cannot edit, add, or delete *conditions* on inherited rules. To 'edit' inherited rule conditions, the entire rule group must be overridden. See the next subsection of this topic, 'Override Inherited Rules,' for more information.

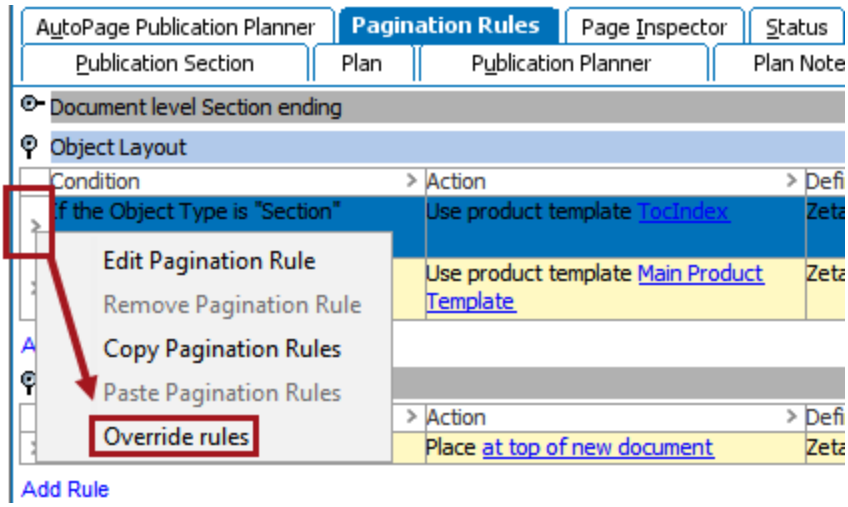
Override Inherited Rules

Since conditions cannot be edited, added, or deleted from an inherited pagination rule, the only way to alter the condition in an inherited pagination rule is to **override** the rule group. Overriding allows you to make changes to both the conditions and actions within the rule group. When a rule group is overridden, all rules are highlighted in green.

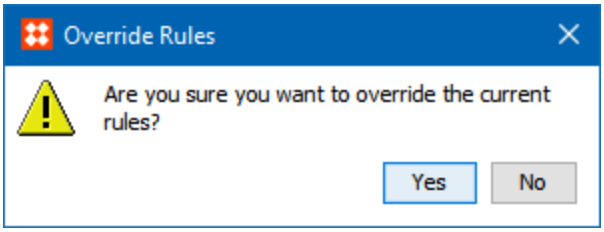
Overriding the rules in a rule group makes them local. When local inherited rules are overridden, changes made at higher levels are not inherited to the level where the rules have been overridden.

To override a rule group:

1. In the Tree, locate the publication, section, or subsection that contains the rule(s) you want to override.
2. On the Pagination Rules tab, left-click or right-click on the small arrow icon next to any rule in the group, then choose **Override Rules.**

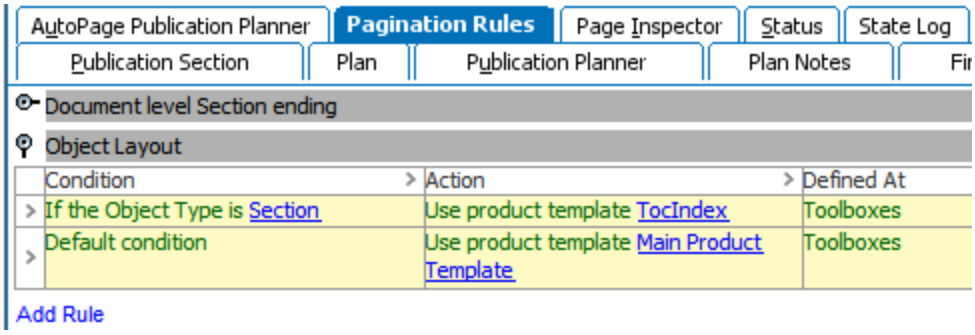


3. Click **Yes** on the Override Rules dialog.



4. The rules are overridden and displayed in green in the list. You can now edit the actions and conditions on the rules, as well as edit and remove rules from the rule group. To restore all original rules that were previously inherited from a higher level, all overridden rules must be deleted.

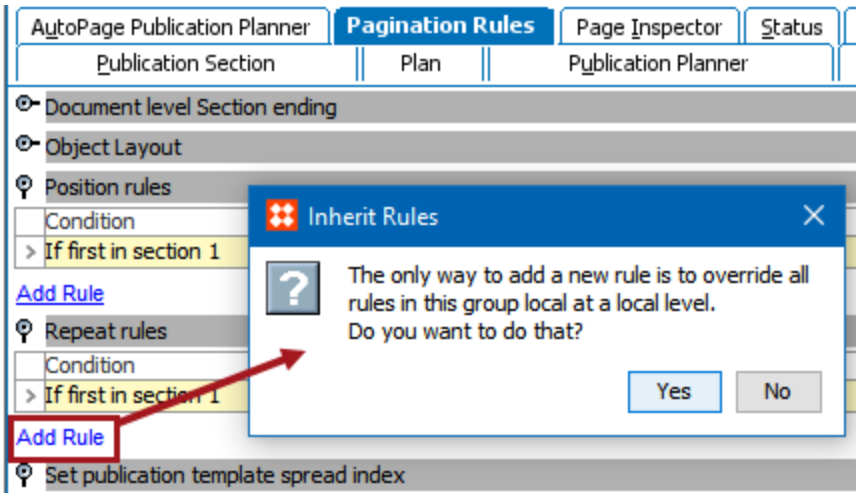
Note: Rules can only be removed one-by-one; it is not possible to multi-select and remove all rules at once.



Add An Extra Rule to a Rule Group with Inherited Rules

When you add an extra rule to a rule group with inherited rules, you are prompted to accept that all rules in the effected rule group will become local.

1. In the Tree, locate the publication, section, or subsection that contains the rule group where the new rule should be added.
2. On the **Pagination Rules** tab, click 'Add rule' within the relevant rule group, then click 'Yes' on the resultant **Inherit Rules** dialog.



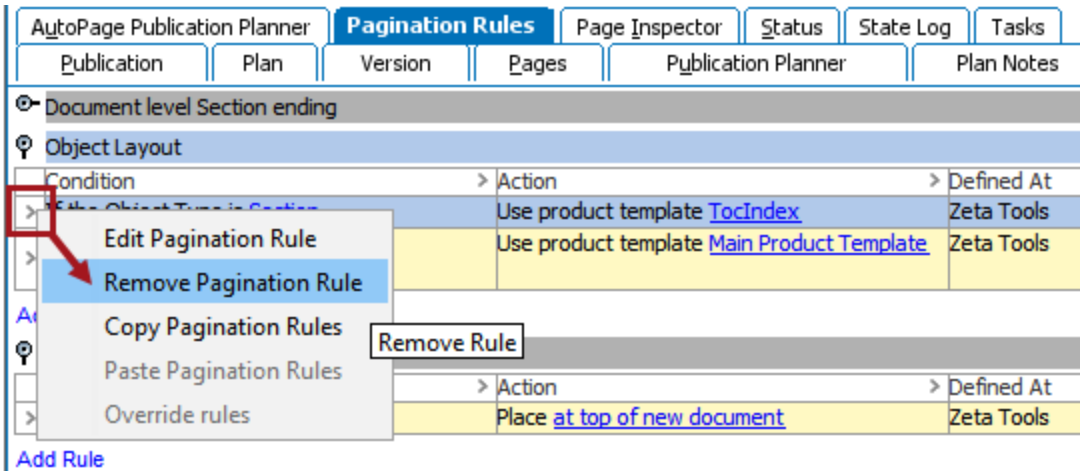
3. Add the new rule(s) by following the instructions outlined in the **Adding Pagination Rules in AutoPage** topic.
4. The rules are made local and are displayed in green in the list.

Remove a Pagination Rule

1. In the Tree, click the publication, section, or subsection that contains the rule(s) that you would like to delete.

   Note: Inherited rules cannot be removed; only overridden. Only local, edited, or overridden rules can be removed.

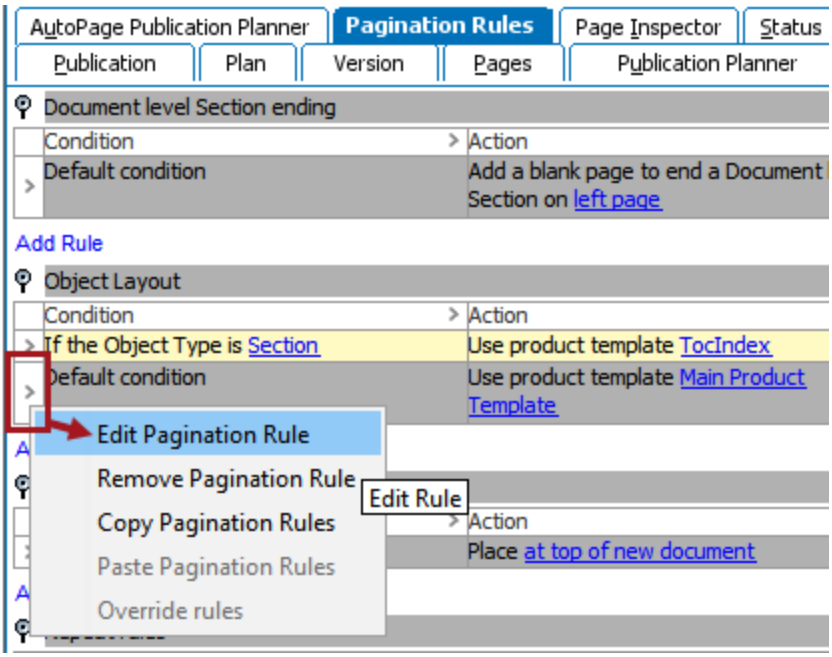
2. On the **Pagination Rules** tab, right-click on the small arrow icon next to the rule you want to remove, then choose **Remove Pagination Rule.**



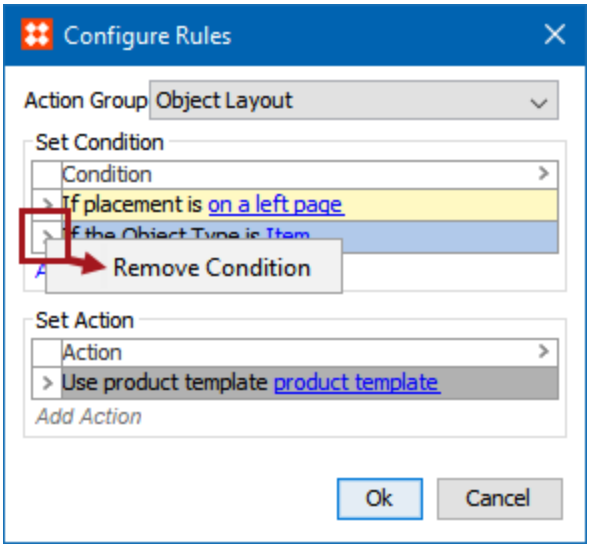
3. The rule is removed.

Delete a Condition or Action

1. To delete a condition or action from a pagination rule on the Pagination Rules tab, right-click on the small arrow in the row that contains the rule that the condition or action is applied to, then choose **Edit Pagination Rule**.



2. In the **Configure Rules** dialog, either left-click or right-click on the small arrow in the row that contains the condition or action to be removed, then click **Remove Condition** (or **Remove Action**, for actions).



Drag and Drop Rules

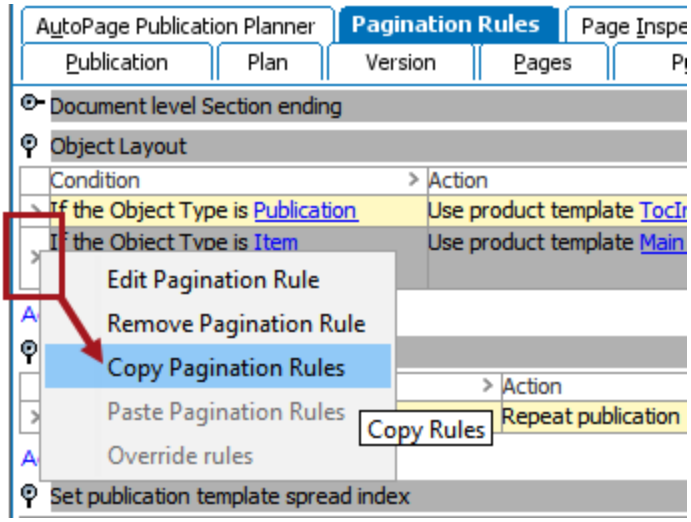
You can change the order of the rules within a group by using drag and drop. On the Pagination Rules tab, simply click on the rule that you want to move, then hold down your left mouse button and drag the rule to its new position.

Note: Rules can only be repositioned within a group; they cannot be moved from group to group.

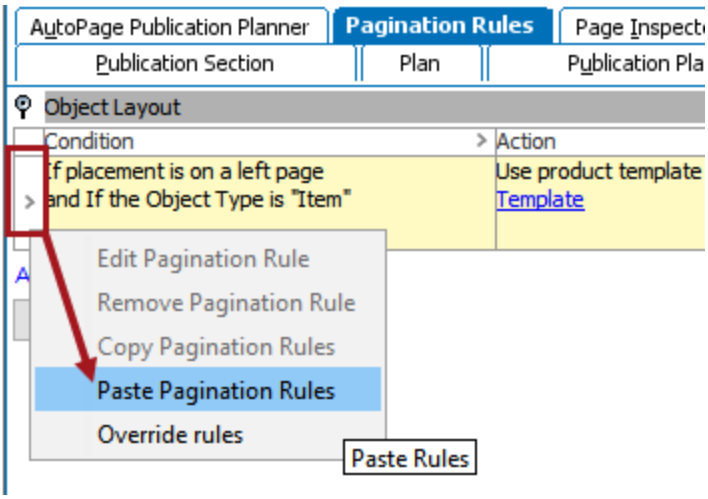
Copy and Paste Pagination Rules

You can copy rules to and from publications, sections, and subsections. The paste destination does not have to be of the same type as the source.

1. In the Tree, locate the publication, section, or subsection that contains the rule you want to copy.
2. On the Pagination Rules tab, click the arrow icon next to the rule you want to copy, right-click, and then select **Copy Pagination Rules**.



3. In the Tree, click the destination publication, section, or subsection and go to the **Pagination Rules** tab.
4. Click the **arrow** icon of an existing rule, right-click, and then select **Paste Pagination Rules**.



Note: If you paste a local rule into a group with inherited rules, all rules in the group are overridden and become local, causing them to display in green.

Autopaginating Pages

This topic describes how to paginate InDesign pages from a publication, section, or subsection, as well as how to choose the desired section level in which to save the final DTP pages.

Prerequisites

- An InDesign server must be set up, running, and connected to your STEP instance
- Products and/or assets and classifications must be linked to the publication, sections, and/or subsections
- A publication template and at least one product template must be linked to the publication
- Pagination rules should be defined for the publication, sections, and subsections
- Layers should be mapped if the publication has multiple versions

About the Autopagination Process

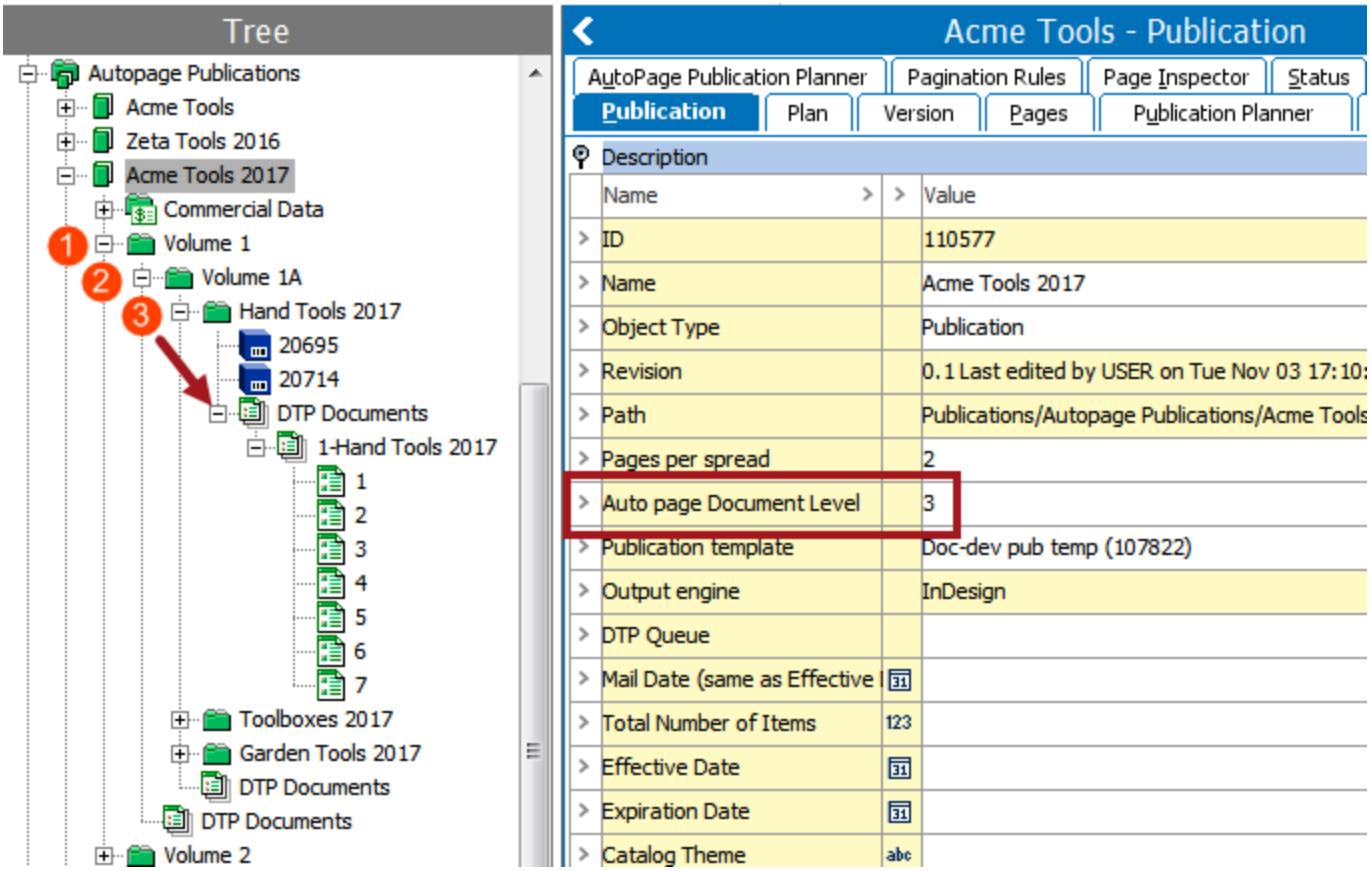
After selecting, linking, and sequencing the objects in your AutoPage publication, it is ready for autopagination. You can paginate an entire publication or only parts of a publication, such as a version or a section.

You can paginate one or all versions of a publication. When you paginate all versions of a publication at the same time, the different versions will be part of the same document but in different layers. Therefore, you have to define layer mappings on the publication. The layer mappings specify how layers from the product template are mapped to the layers in the actual InDesign document. For more information about layer mapping, see **Mapping Versions to Layers** in the **STEP'n'design** documentation.

Every object is measured and space is allocated for the longest version on all layers. As a result, every product presentation element starts on the same position in all versions. The product presentations that you select for a multi-version AutoPage publication must be the same in the different versions.

Specifying the Document Save Location

Autogenerated DTP documents are saved under the section level based on the 'Auto page Document Level' that has been set on the publication. For example, If this has been set to '3' then the pages will be saved under the third-level sections, as pictured in the below screenshot.



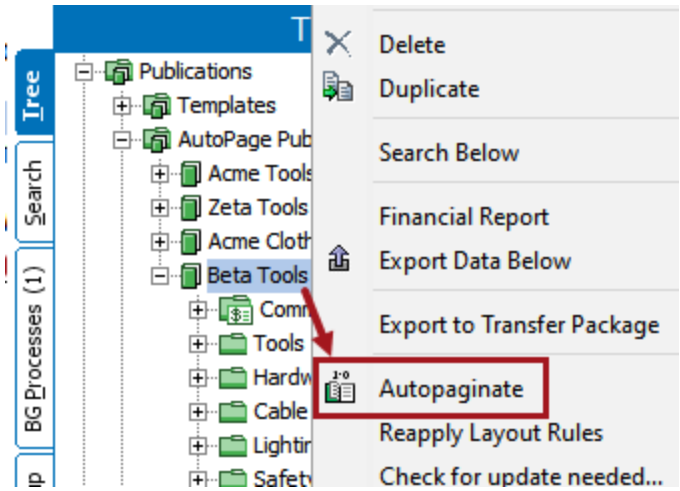
Note: If the publication structure contains products on each level, then you cannot select that level as a storage point for your DTP documents.

Example: You have a publication that has section (Level 1), subsection (Level 2), and another subsection (Level 3) under it. If you are going to add products under Level 1 then you will be unable to choose 3 under 'Auto page Document level.' The storage level will be restricted to '1,' which means that the DTP documents will be stored under Level 1.

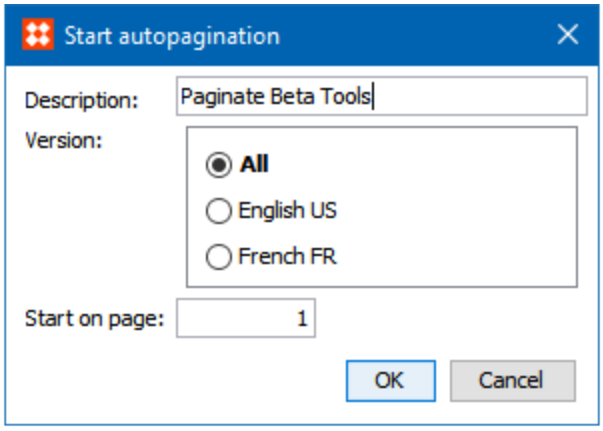
If you are going to add the products only from Level 3 onwards in your publication, then you will be allowed to set this to 3 and the DTP documents will be created and stored under Level 3, as illustrated in the previous image.

To Start the Autopagination Process

1. In the Tree, select and right-click on the publication, section, or subsection that you want to paginate, then click **Autopaginate**.



2. In the 'Start autopagination' dialog, select the **version** you want to paginate, then enter the page number in **Start on page** where you would like the autopaginated pages to begin. Click **OK**.



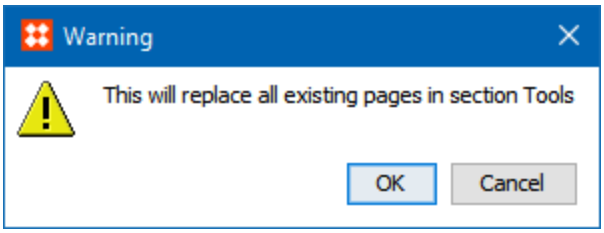
3. In the 'Starting process Paginate' dialog that displays, click **Close** or **Go to process**. 'Go to process' takes you to the 'Autopage Batch Service' on the **BGProcesses** tab.

The actual pagination is carried out by the InDesign server. A pagination request calls the InDesign server via the background process and starts the pagination process. The InDesign server then carries out page pagination based on the applied publication template and pagination rules. When completed, the InDesign server saves the paginated pages back to STEP in the **DTP Documents** node under the section level designated in 'Auto page Document Level.'

After the pages are saved to STEP, you can view them in the Page Inspector. For more information, see the **Page Inspector** topic.

Repaginating Pages

If the autopagination process is initiated on a section that already contains DTP documents, a warning dialog displays to inform users that all pages in the section will be replaced. This dialog does not display if the autopagination is re-initiated from a higher section level that does not itself contain DTP pages. I.e., if section level 1 contains no pages but section level 2 does, the warning will only display when autopagination is re-run from a section level 2.



Inspecting and Updating Pages

Once paginated DTP pages have been saved back to STEP, the pages can be both inspected and updated within the workbench from the **Page Inspector** and the **AutoPage Publication Planner** tabs. Both single and multi-version publications can be actioned from these locations.

Page Inspector

From the Page Inspector, actual pages can be viewed and edited from within the workbench. Mounted objects can be repositioned, remounted, and reflowed on a page; content can be updated; documents can be opened directly in InDesign; layouts can be locked; pages can be sent to the printer; and more.

For high-level information on the Page Inspector and its interface, see the **Page Inspector** topic.

For information on how to view markers for product borders, measurements, oversets, layout source, and update needed, see **Viewing Markers and Overset Text**.

For information on how to reposition objects on pages and manually set object justification, see **Repositioning Objects in the Page Inspector**.

AutoPage Publication Planner

From the AutoPage Publication Planner, actual pages are not viewable, but multiple actions can be taken on pages within the publication, including:

- Resequencing objects. See **Resequencing Linked Objects in AutoPage Publications**.
- Check if an update is needed and update content. See **Updating Documents in AutoPage**.
- Set page numbers. See **Controlling Page Numbers**.
- Create a PDF. See **Generating PDFs for Proof Viewing**
- Create an AutoPage Planner report. Information is available in the **AutoPage Publication Planner** topic.

Actions Available in Both the Page Inspector and AutoPage Publication Planner

The following actions are available from both the Page Inspector and the AutoPage Publication Planner tabs.

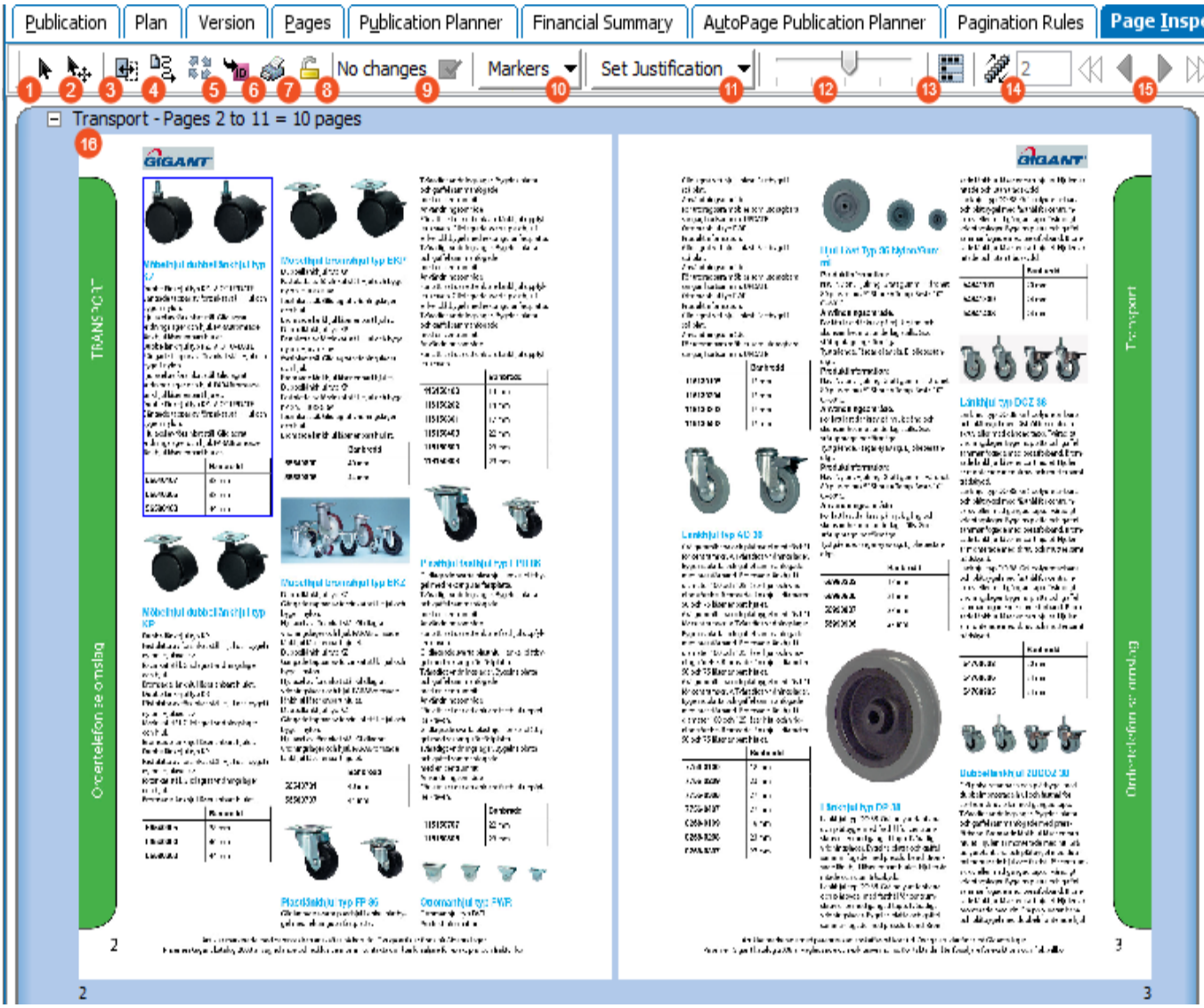
- Remount and reflow objects. See **Remounting and Reflowing Objects**.
- Update documents. See **Updating Documents in AutoPage**.
- Print pages or sections. See **Printing Pages in AutoPage**.

Page Inspector

The Page Inspector is a tool in the STEP Workbench used for viewing and editing InDesign pages generated through AutoPage. From the Page Inspector, mounted objects can be repositioned, remounted, and reflowed on a page; content can be updated; documents can be opened directly in InDesign; layouts can be locked; pages can be sent to the printer; and more. To view the Page Inspector, select the relevant publication, section, or subsection in the Tree, then click the **Page Inspector** tab.

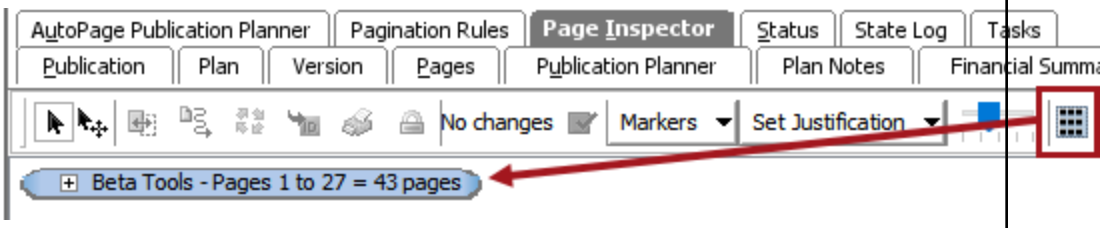
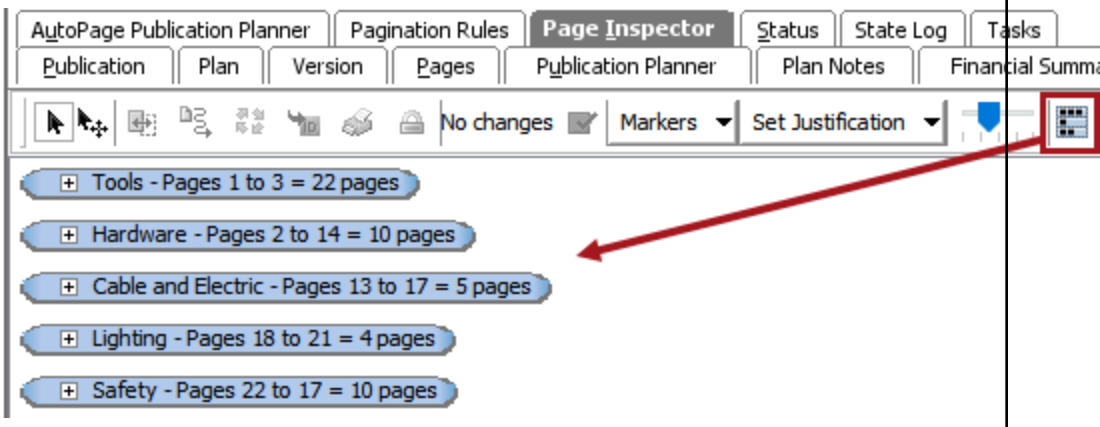
Overview of the Page Inspector Interface

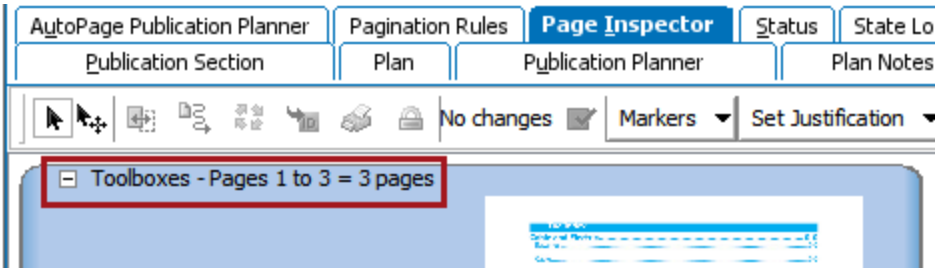
The following screenshot shows an example of an autopaginated catalog spread as viewed in the Page Inspector. The toolbar at the top of the Page Inspector contains the tools that can be used on the mounted objects and pages. The numbers in the following screenshot correspond with the numbered entries in the table directly below it.



No.	Tool	Description
1	Selection	Using this pointer, single-click on a product or page to select it. Double-click to go to that object in the Tree hierarchy. To select multiple objects, hold down the CTRL key when making selections.
2	Positioning	Change the position of objects on a page. After moving an object, the 'No Changes' button (9) indicates the number of changes made. Click **Apply Changes** for the changes to take effect.

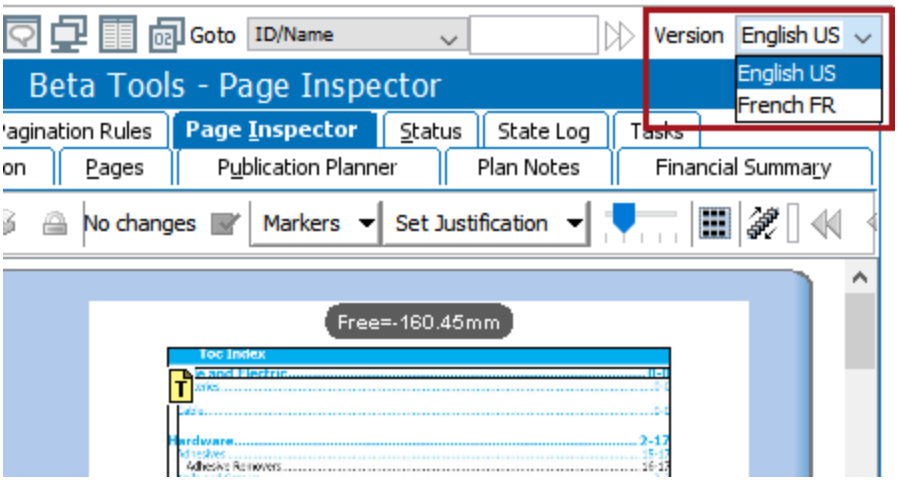
No.	Tool	Description
3	Remount objects	Remount one or more objects at a time. For more information, see **Remounting and Reflowing Objects**.
4	Reflow objects	Reflow objects from the selected object until the end of a page or the end of a section. For more information, see **Remounting and Reflowing Objects**.
5	Update content	Update the product content. You can either update the entire content of one or more selected objects, or you can update specific items such as attributes, commercial terms, image references, and object names. For more information, see **Updating Documents in AutoPage**.
6	Open document in InDesign	Open a document in InDesign. You can manually make edits to the document in InDesign, then save it back to STEP from within InDesign. For more information, see the **Saving Finalized InDesign Documents to STEP** section of the **STEP'n'design** documentation.
7	Print	Print sections, subsections, or pages. For more information, see **Printing Pages in AutoPage**.
8	Lock layout	Remembers a product presentation layout while you are using autopagination, reposition, remount, or reflow. Select the changed product presentation and click the **Lock Layout** icon. Locked layout only concerns the product presentation layout and has nothing to do with the position on the page.
9	No changes / changes made No changes 2 changes made	Indicates the number of changes that have been made with the Positioning Tool (2). Click the checkbox to apply the changes. The text 'No changes' will display until a change has been made. For more information, see **Repositioning Objects in the Page Inspector**.
10	Markers	Select a marker to view detailed information about the mounted objects. For more information, see **Viewing Markers and Overset Text**.

No.	Tool	Description
	Markers	
11	Set Justification Set Justification	Justification options are enabled when a page is selected. The available options are Justify Top, Justify Bottom, and Justify Balance. For more information, see **Repositioning Objects in the Page Inspector**.
12	Zoom slider	Use the slider to zoom in to get a close-up view of a page or zoom out to see more of the page.
13	Hide / show subsections /	Select whether to show or hide subsection titles. Subsection titles indicate the start of a new subsection. Subsections hidden:  Subsections shown:  By default, subsections display as expanded. The subsections have been collapsed for this illustration.
14	Specify number of	Show all pages or specify a page range to be shown. The default is to show all

No.	Tool	Description
	pages to be shown	pages.
15	Page range options	Specify the start and end page of a page range. This option is only enabled if **Show a page range** is used. The navigation arrows show the following. First page range in section Previous page range Next page range Last page range in section
16	General section information	Displayed in the upper left corner of the interface are: • Section / subsection name • Page numbers within the section (e.g. Pages 1 to 3) • Total numbers of pages within the section (e.g. 3 pages) 

Inspecting Multi-version Publications in the Page Inspector

While in the Page Inspector, if you wish to view a different version of your publication, select the relevant version from the **Version** dropdown in the upper-right corner of the STEP GUI. This dropdown is not a part of the Page Inspector toolbar, but is a part of the STEP Workbench interface that is visible when viewing most publication hierarchy objects.

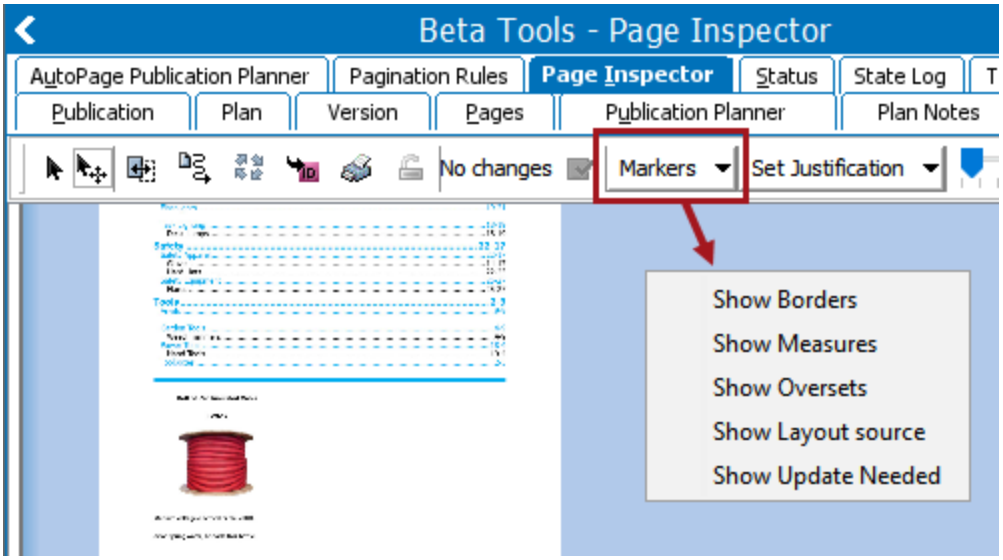


Note: When you apply any of the following actions—Remount, Reflow, Update content, Apply changes, or Justification—they apply to all versions of a publication, not just the selected version.

Viewing Markers and Overset Text

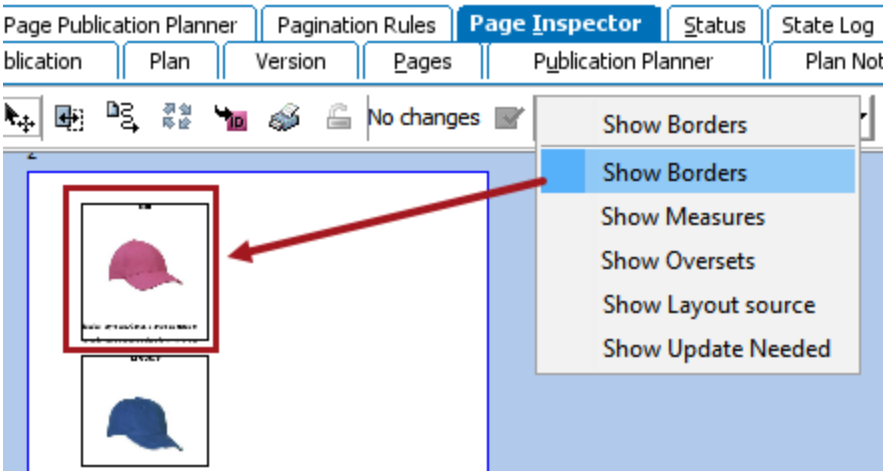
When inspecting pages in the Page Inspector, markers provide information about the products mounted to the page. Click **Markers** to view the list of available markers that can be placed onto the mounted objects. The following options are available:

- Show Borders
- Show Measures
- Show Oversets
- Show Layout source
- Show Update Needed



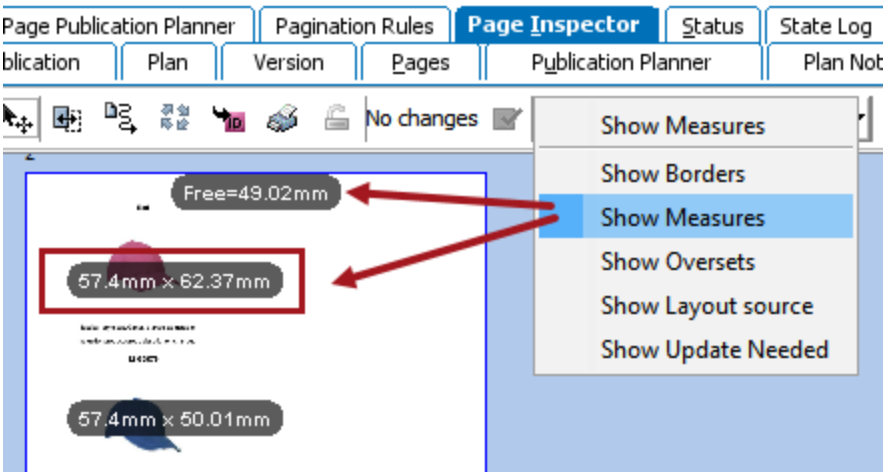
Show Borders

Places a black frame around each object to show the borders of a product presentation.



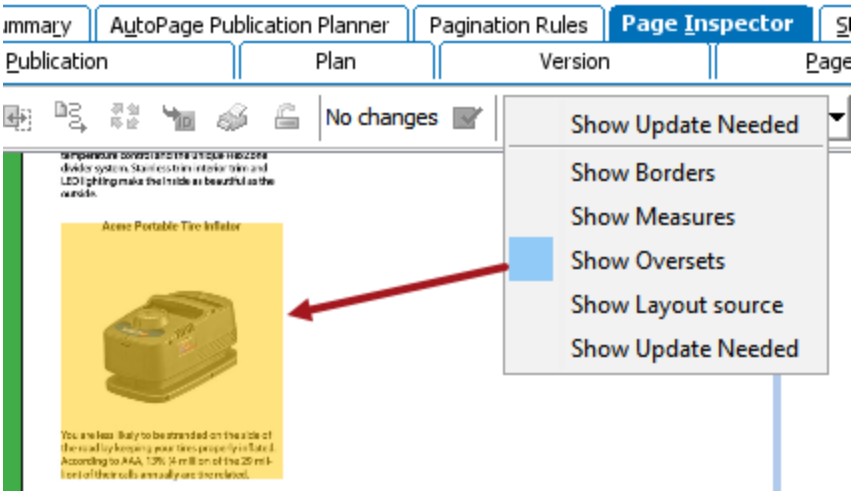
Show Measures

Shows the width and height of a product presentation, as well as the free space left on a page.

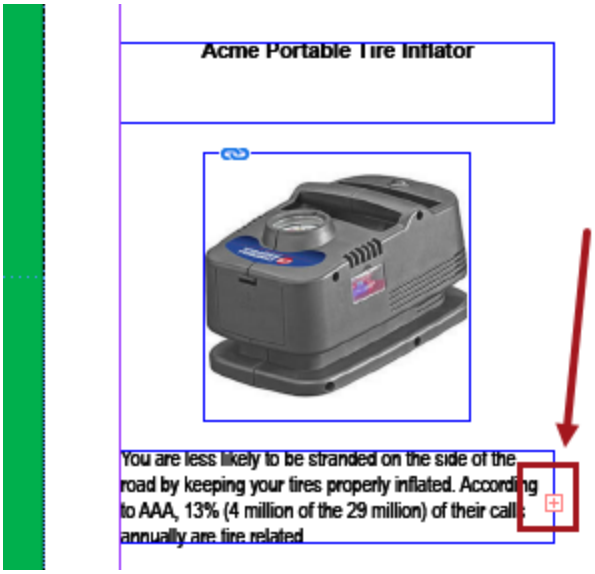


Show Oversets

Shows which paginated objects contain overset text. The objects are highlighted in yellowish orange.

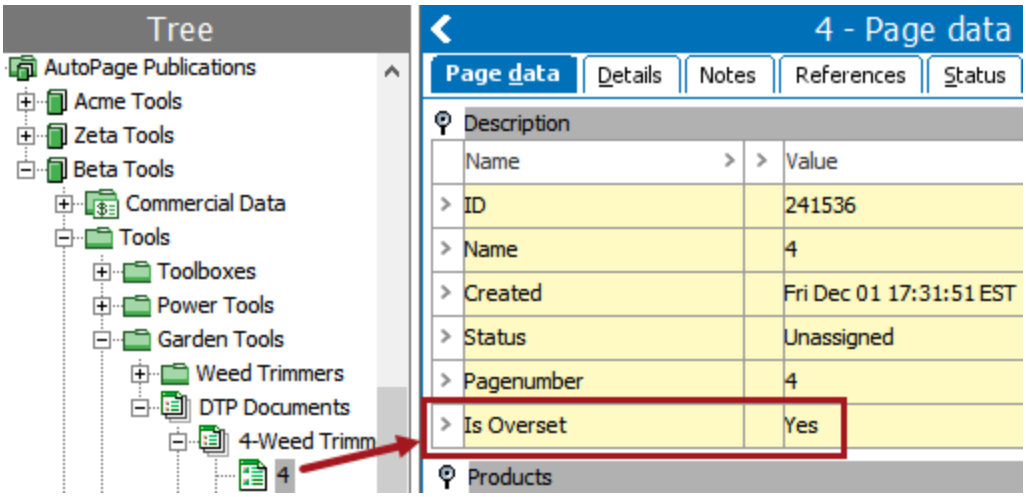


Overset means that there is too much text to fit in the visible frame on the InDesign page. The object will need to be remounted to resize the frame so it will accommodate all of the text. The following screenshot shows what the overset text frame looks like on the InDesign page, as indicated by a square with a red cross in the middle.

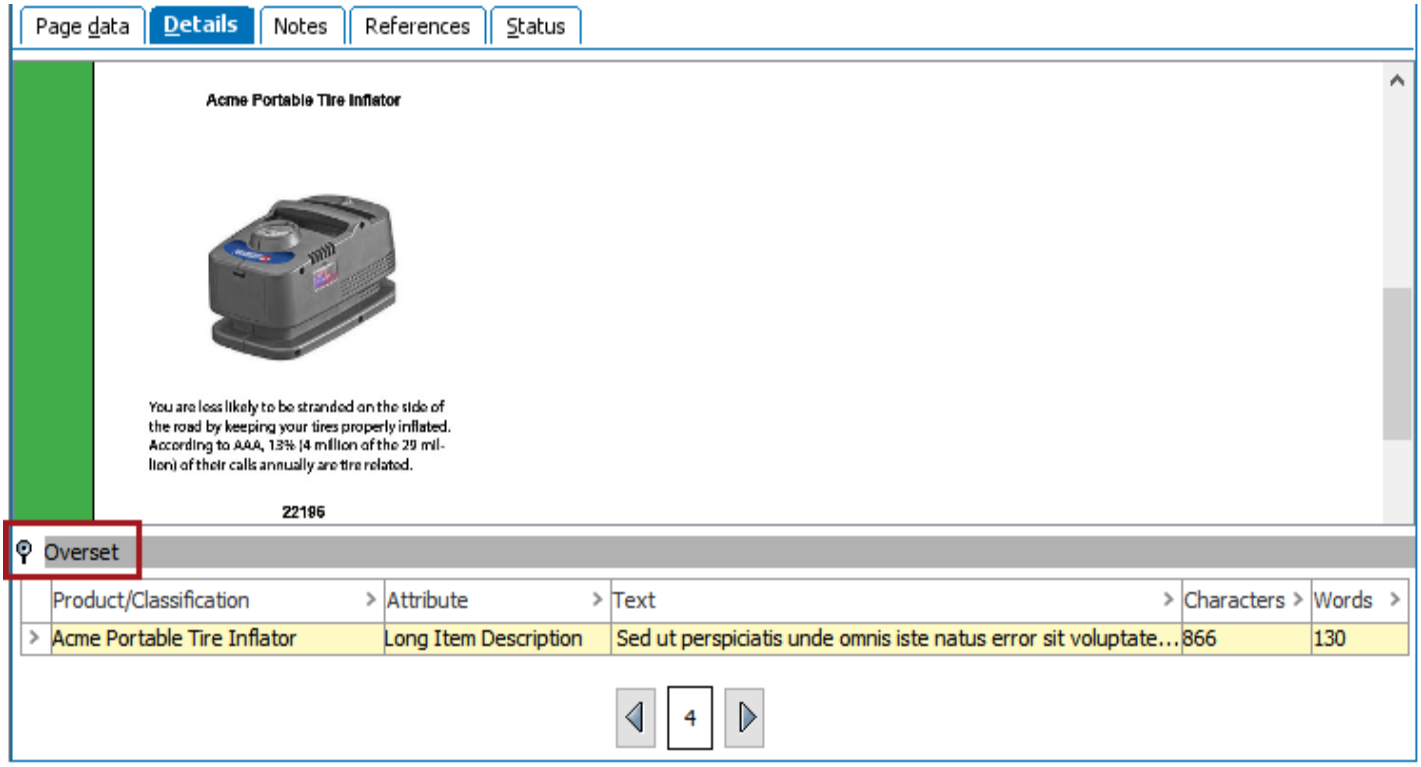


Viewing Overset Text in the Workbench

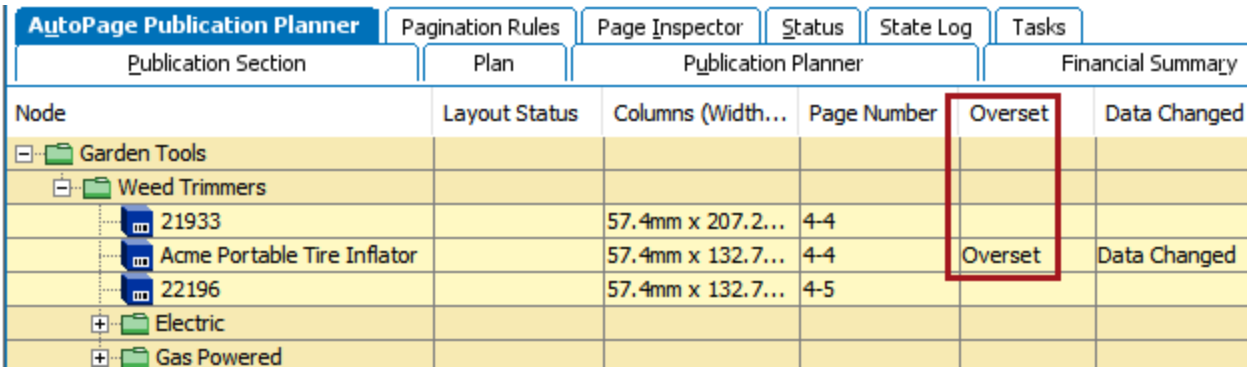
1. Double-click the white space of the page that contains the mounted object with oversets. The workbench will route to the DTP page in the **Tree**.
2. On the **Page data** tab, if there is any overset text on the page, the value of **Is Overset** will be 'Yes.'



3. On the **Details** tab, expand the **Overset** flipper below the page. The following information about the overset is displayed:
   - The mounted product / classification object that contains the overset text
   - The attribute that contains the overset text
   - The text where the overset begins
   - The number of characters in the overset text
   - The number of words in the overset text



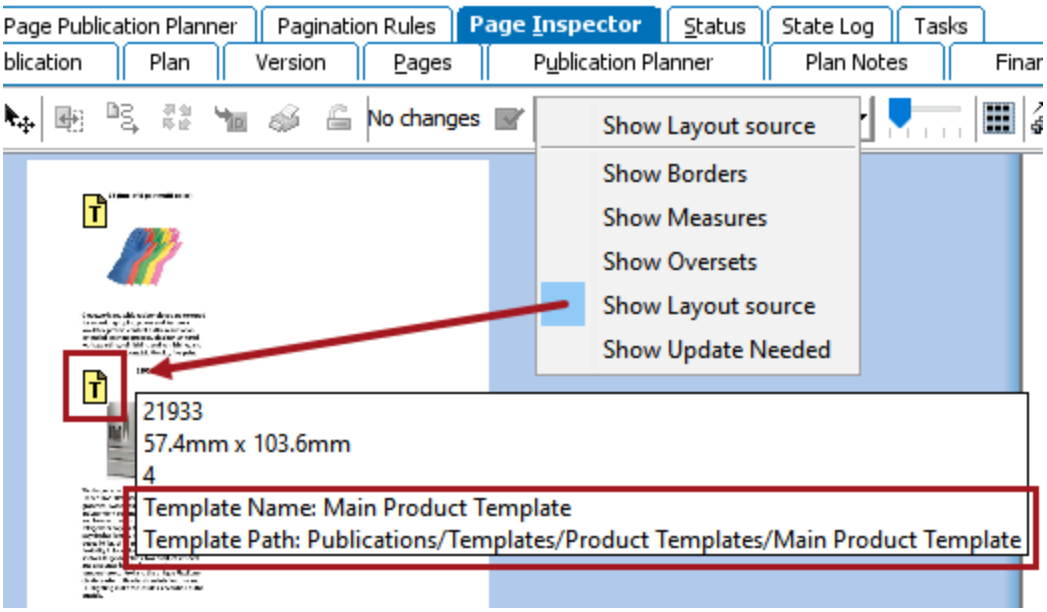
4. Information about overset text can also be viewed on the Publication Planner tab. If there are any oversets, they are listed in the **Overset** column.



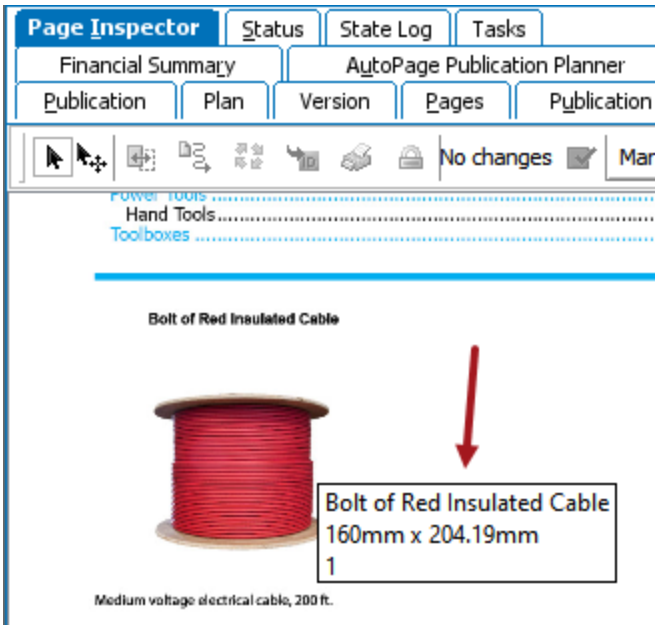
4. To resolve the overset text, remount the object. See the **Remounting and Reflowing Objects** topic for more information.

Show Layout Source

Shows the name of the product template and the STEP path where the template can be found. If the product is mounted with an existing layout that is picked up from another publication, this is also shown. Hover the mouse over the layout symbol to view details about the product template.

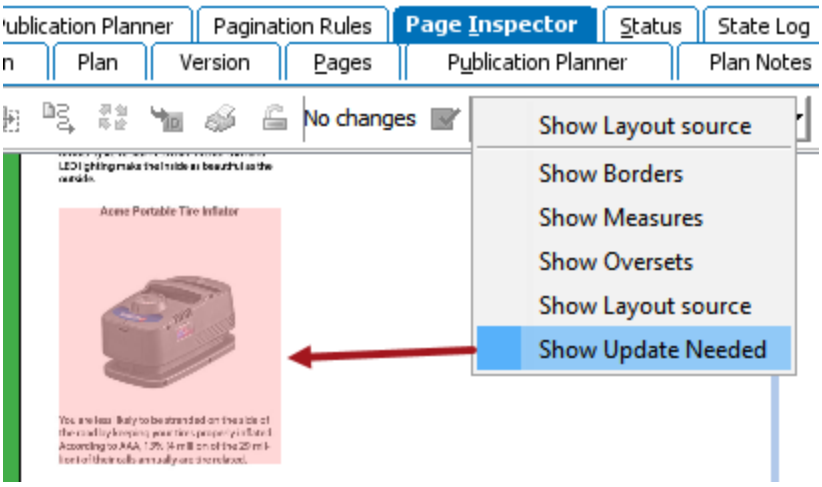


Note: Without 'Show Layout source' selected, hovering your mouse over a mounted object will still display a limited amount of information—the object name, dimensions of the mounted object, and the page number the object appears on. However, 'Show Layout source' must be selected to view product template information.



Show Update Needed

Indicates if the product data has been updated in STEP since the product was mounted on the page. The objects are highlighted in light red.



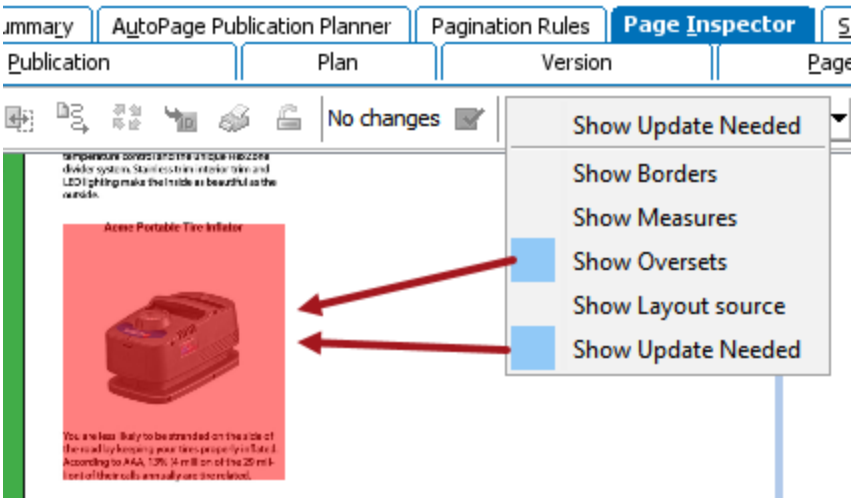
Objects are only highlighted if you have already run a **Check for update needed** operation on the relevant publication group, publication, section, or DTP document. For information on how to run a check for needed updates, see the **Updating Documents in AutoPage** topic. For information on how to check for needed updates using bulk update functionality, see the **Publishing Operations for Bulk Updates** topic in the **Bulk Updates** documentation.

Selecting Multiple Markers

Multiple markers can be activated on the page at the same time.

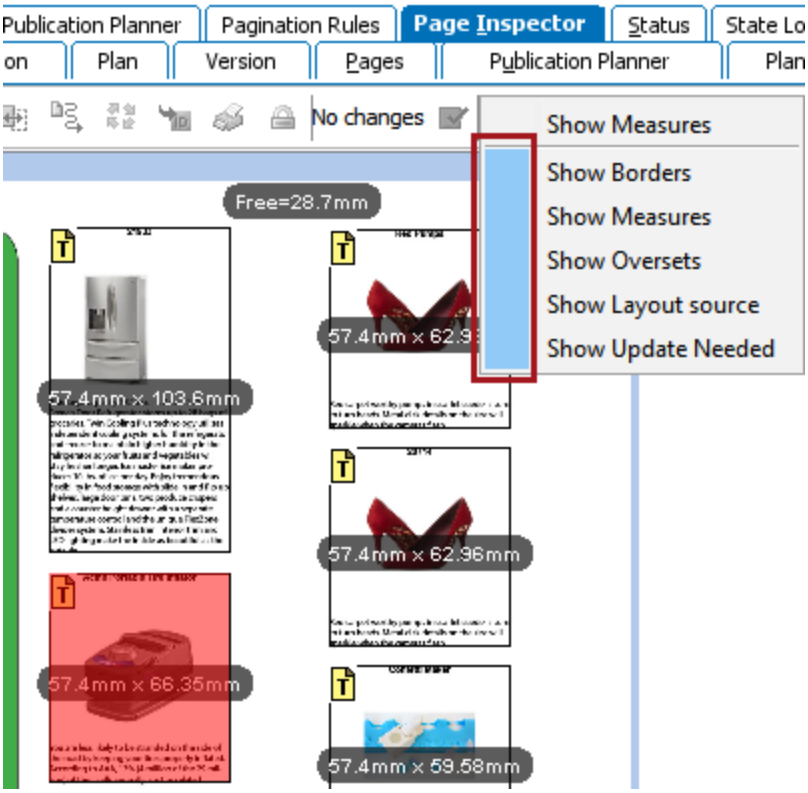
Overset & Update

If an object is both overset and needs update, and both markers are shown, the object is highlighted in red. Both markers must to be turned on to see the red color.



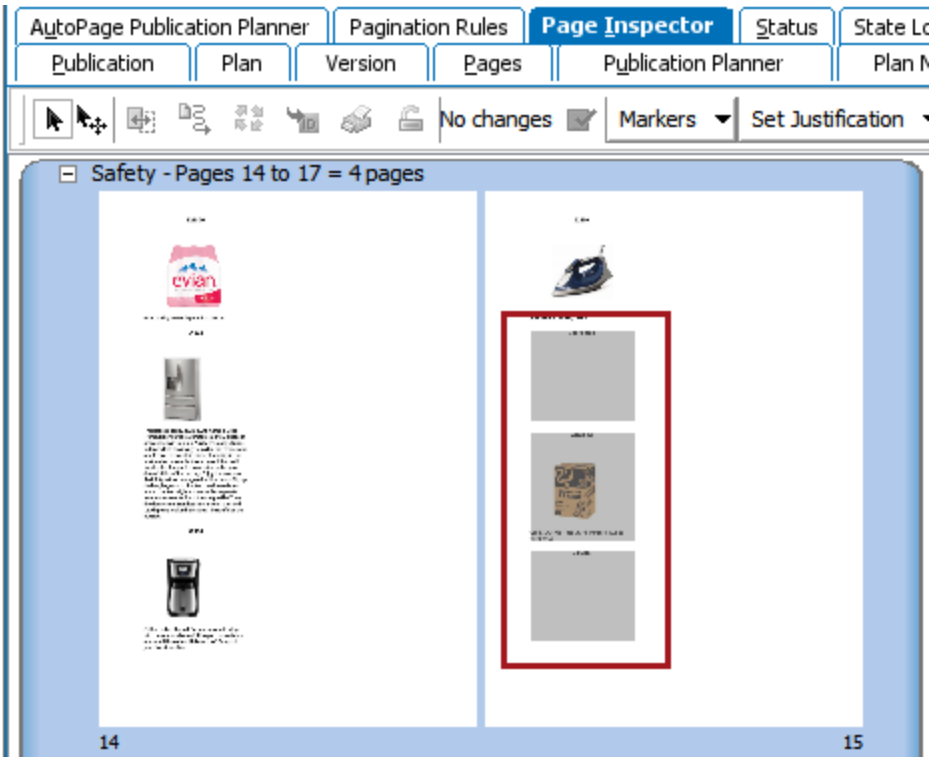
All Markers

The following screenshot shows a sample page with *all* markers activated.



Gray Boxes in the Page Inspector

Though not technically considered a marker, gray boxes sometimes display on mounted objects in the Page Inspector.



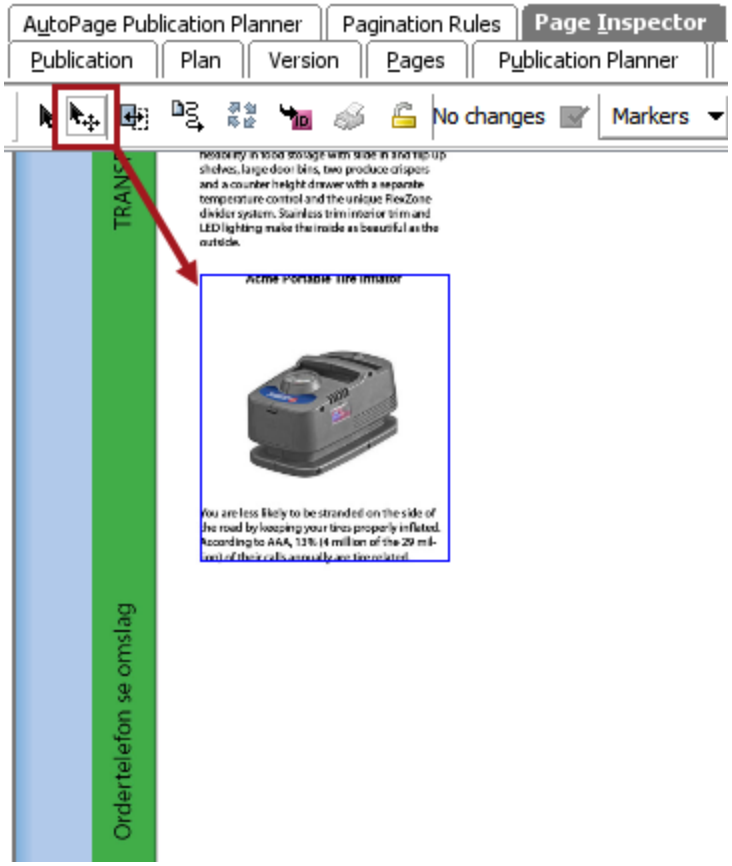
These gray boxes appear because the same page can be visible in two subsections if the mounted page contains objects from both subsections. The objects that do not belong to the selected subsection are displayed in a gray box. Also, because the page belongs to two different subsections, it is displayed twice in the Page Inspector.

Repositioning Objects In the Page Inspector

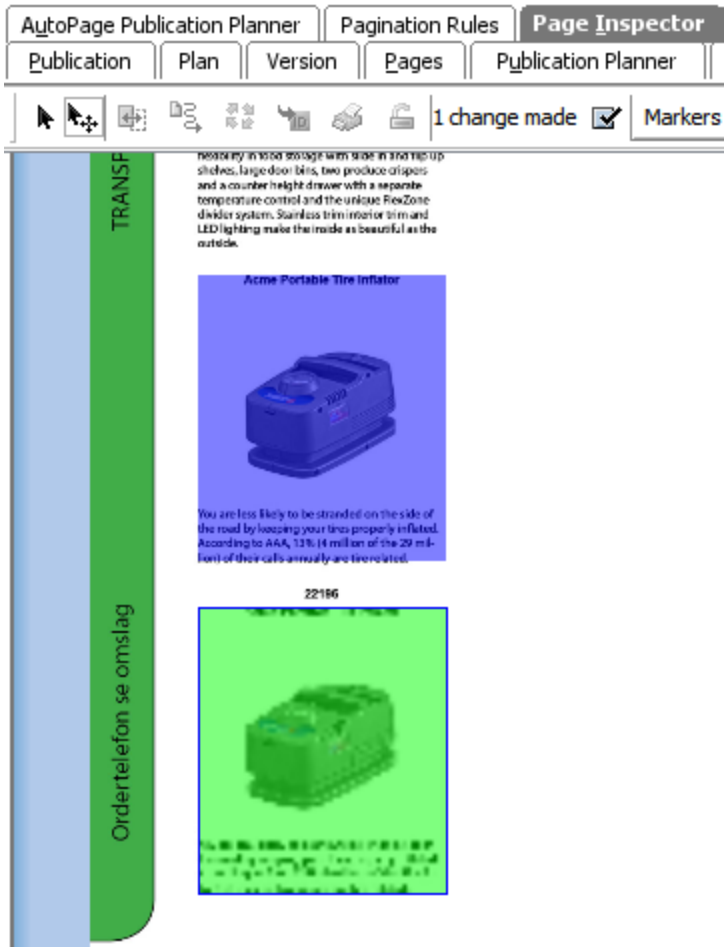
Objects can be repositioned on InDesign pages within the workbench through the interface of the Page Inspector. This allows for users to update page layouts without having to go into InDesign.

Note: If you want to change the order of the objects, and not simply reposition them, they must be resequenced instead. See **Resequencing Linked Objects in AutoPage Publications** for more information.

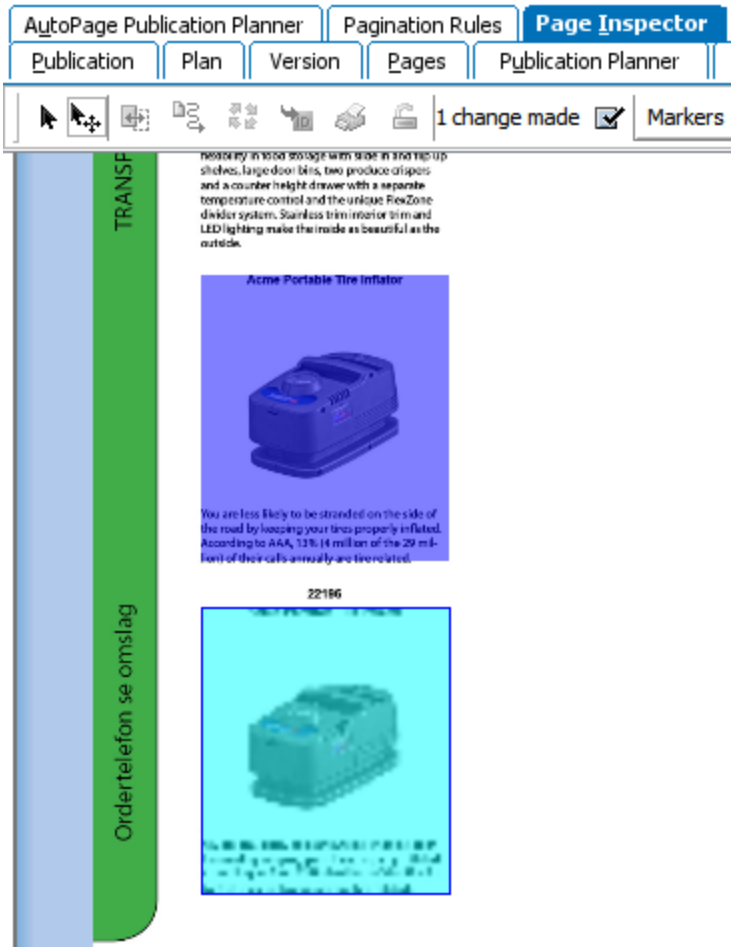
1. In the **Tree**, click the relevant section or subsection.
2. On the **Page Inspector** tab, click the **Positioning** tool , then select the object that you want to reposition. a blue border displays around the selected object.



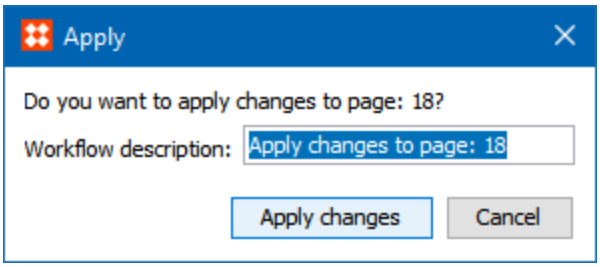
3. Drag and drop the object to its new position. The new position is highlighted in green, and the object's former position is highlighted in blue.



- If the Show Oversets / Show Update Needed markers have been selected and the repositioned object is overset or needs to be updated, the object is highlighted in cyan instead.



4. The **Apply changes** button (1 change made)indicates the number of objects that have been repositioned. Click the 'Apply changes' checkbox for the new position to take effect. If you have only made one change, the system makes the change immediately. Otherwise, a background process is started.



Set Object Justification

Objects can be justified on a page from within the Page Inspector.

While in the Page Inspector, select either a product, multiple products (by holding the CTRL or Shift key while making selections), or a page, then click **Set Justification**. The following options are available:

- **Justify Top**: repositions the selected objects at the top of the page
- **Justify Bottom**: repositions the selected objects at the bottom of the page
- **Justify Balance**: repositions the selected objects so that the white space between the objects is distributed evenly

Setting Object Justification on an Entire Publication

To set the justification on an entire publication at once, set a 'Use vertical alignment' pagination rule. The available options are top, bottom, and balance. For more information, see **AutoPage Pagination Rule Actions**.

Use vertical alignment

Condition	Action	Defined At
Default condition	Vertical alignment balance	Beta Tools

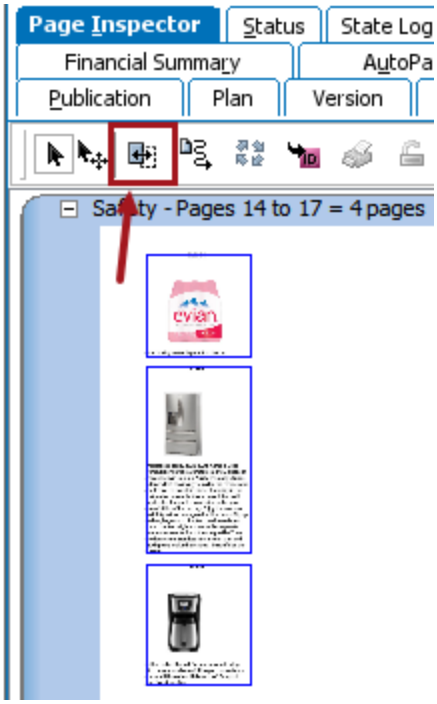
Remounting and Reflowing Objects

Pages can be remounted and objects can be reflowed from either the **Page Inspector** or the **AutoPage Publication Planner**.

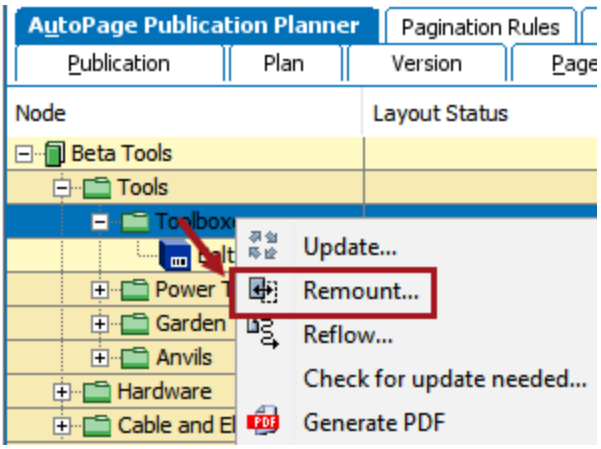
Remount Objects

One or more objects at a time can be remounted on autopaginated pages. This is useful, for example, if you have made changes to the product template, if you want to resolve overset text, or if the product content has been changed.

1. In the Tree, select the relevant publication, section, or subsection.
2. If using the **Page Inspector**, select the relevant objects or pages that you want to remount (press and hold the CTRL key to multi-select objects or pages), and then click the **Remount** icon .



3. If using the **AutoPage Publication Planner**, select the section or objects that you want to remount, right-click, and then select **Remount**.



4. If only one object is selected, the system makes the change immediately. Otherwise, the system starts a background process.

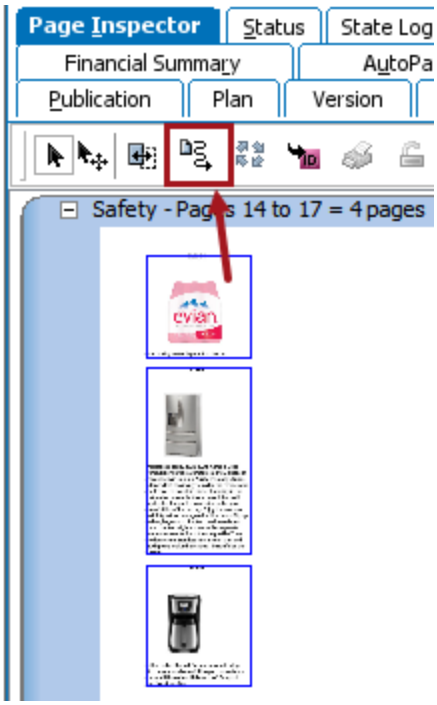
Reflow Objects

Objects can be reflowed until the end of a page or the end of a section. This is useful if you want to optimize a limited number of pages; for example, if you have removed an object or have resequenced objects. In this case, it is recommended to run a reflow operation instead of a complete autopagination.

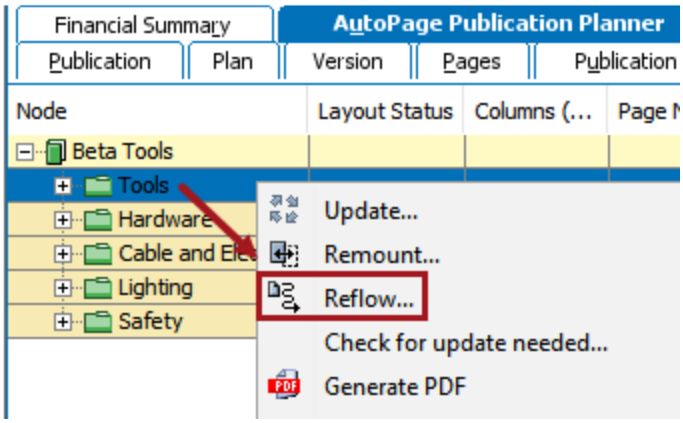
Note: If you have added products, new spreads will be added either at the end of the indicated page or at the end of the indicated section.

---

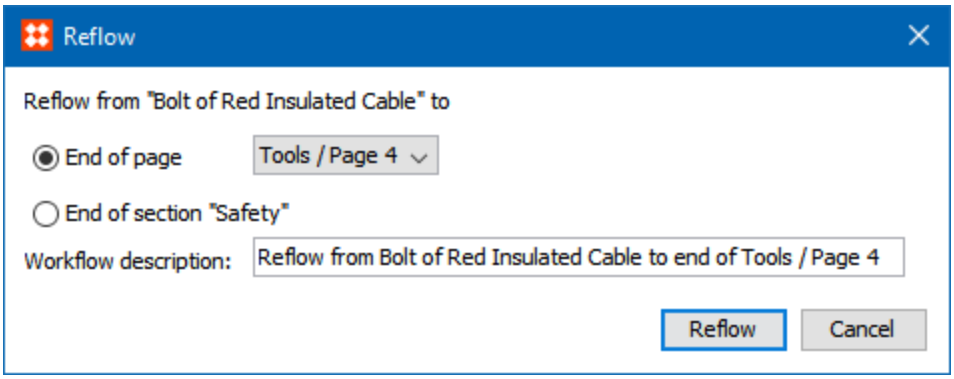
1. In the Tree, select the relevant publication, section, or subsection.
2. If using the **Page Inspector**, select the relevant object or page, then click the **Reflow** icon .



3. If using the **AutoPage Publication Planner**, select the relevant sections or objects, right-click, then choose **Reflow**.



4. In the Reflow dialog, select either 'End of page' or 'End of section,' then click **Reflow**.


Reflow
Reflow from "Bolt of Red Insulated Cable" to
End of page
Tools / Page 4
End of section "Safety"
Workflow description:
Reflow from Bolt of Red Insulated Cable to end of Tools / Page 4
Reflow
Cancel

Controlling Page Numbers

To ensure consecutive page numbering in sections, the starting page number can be specified, as shown in the following example:

Section 1: pages 1 - 10

Section 2: pages 11 - 20

Section 3: pages 21 - 30

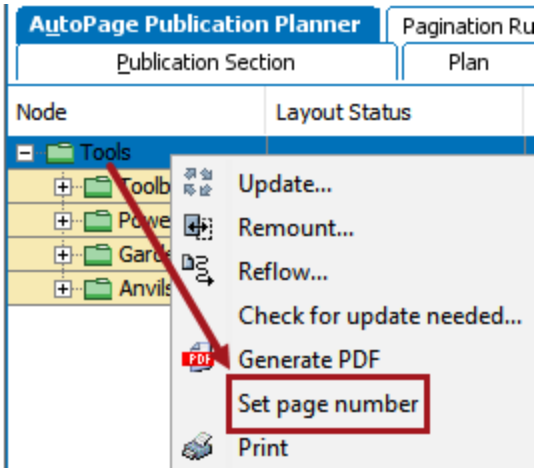
Important: This may result in page swap from left to right pages or vice versa. When swapping pages, it might require all pages to be remounted, if there are left and right hand page specific pagination rules. If a remount is required, all changes applied manually to the actual pages are lost.

To Control Page Numbers

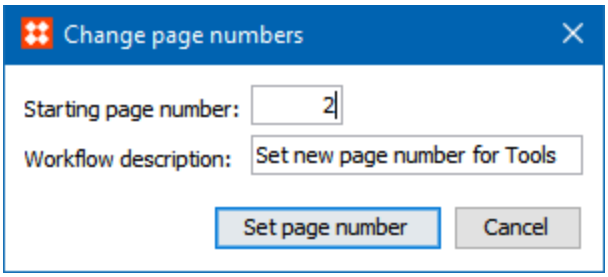
1. In the Tree, click the relevant publication, section, or subsection.
2. Click the **AutoPage Publication Planner** tab, then select the publication, section, or subsection that you want to set page numbers for.

   Note: It is recommended to set the page numbers at the section level.

3. Right-click, then select **Set page number**.

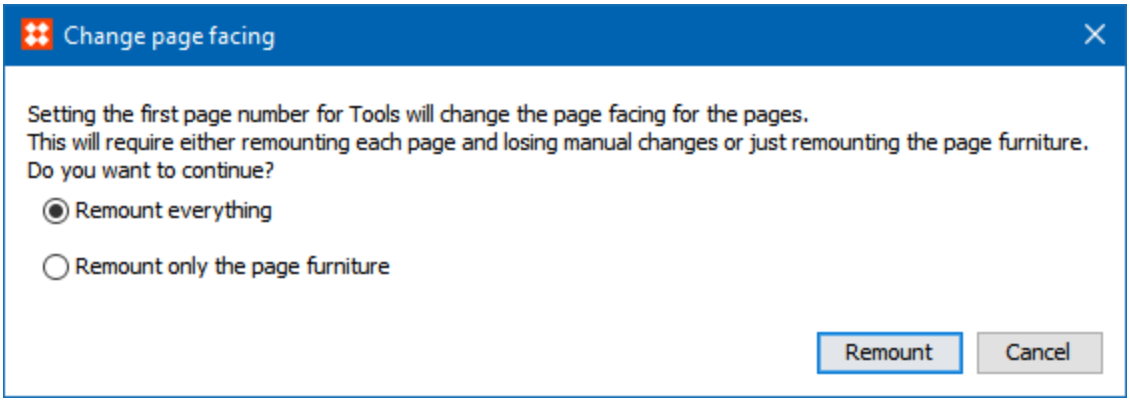


4. In the 'Change page numbers' dialog that displays, type a number into the 'Starting page number' field, then click **Set page number**.



5. When page numbers are changed, it may result in page swap from left to right or right to left. If this is the case, the **Change page facing** dialog is displayed. Select either 'Remount everything' or 'Remount only the page furniture,' then click **Remount**.

   Page furniture is another term for the background elements in a publication template, such as the page numbers.



   If different pagination rules exist for left and right pages, it is recommended to choose **Remount everything**. This causes all pages to be remounted, but note that all manual changes made to actual pages will be lost. To only remount the publication template elements ('page furniture'), choose **Remount only the page furniture**.

6. In the 'Starting process Set new page number' dialog that displays, click **Close** to close the dialog. Click **Go to process** to be routed to the Autopage Batch Service on the **BGProcesses** tab.
7. A request is sent to the InDesign server to update the page numbers of the actual pages in the section. The InDesign server saves new versions of the documents to STEP.

Updating Documents in AutoPage

One advantage of using AutoPage to automate page building is the ability to automatically update the contents of previously built pages without having to rebuild them from scratch.

When pages are built using AutoPage, the content placed from STEP onto the pages accurately reflects how the content existed in STEP at that moment in time. If changes are made later to the corresponding content in STEP (for example, attribute values or referenced images), the pages become out of sync with the latest content.

When this content mismatch occurs, there are several options available within the STEP Workbench for updating page contents.

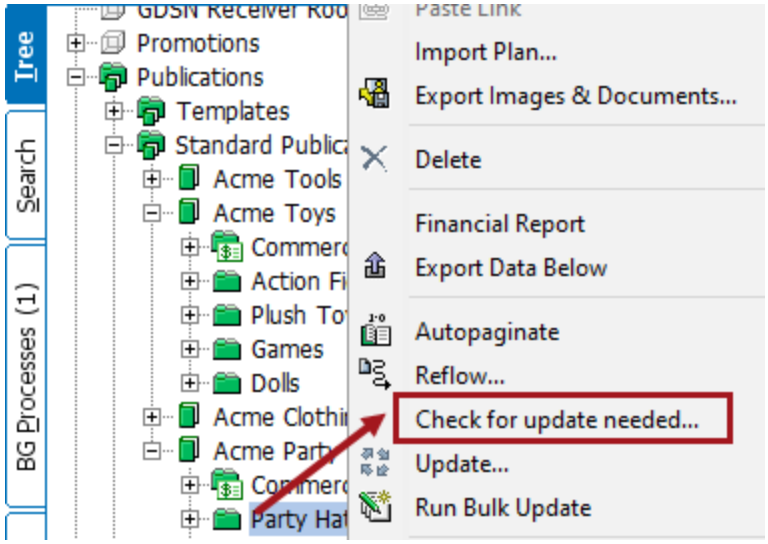
Check for Updates

Though it is possible to update the contents of entire publications and sections at once without first checking to see exactly what pages or mounted objects contain outdated content, STEP provides options that can pinpoint the exact locations where content needs updating. This 'pinpointing' approach allows for smaller page update operations, preventing scenarios where a large amount of system resources are tied up for large update operations (for example, on entire publications) when only one section or even one document may actually need updating.

Documents can be checked for needed updates from the Tree, the AutoPage Publication Planner, and by using a Bulk Update operation.

Check for Updates From the Tree

1. In the Tree, navigate to the relevant publication or section, then right-click and select **Check for update needed...**.



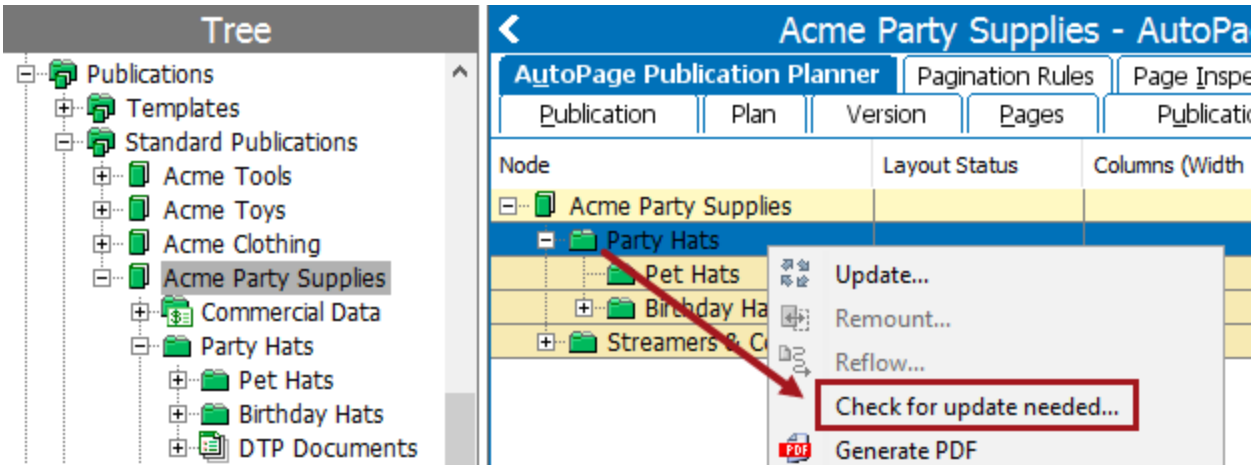
2. The **Check for Update Needed** dialog displays. Click **OK**.
3. An 'Autopage Batch Service' background process is kicked off that checks for changes in all the mounted products in the selected publication or section.
4. To monitor the progress of the background process on the BG Processes tab, click 'Go to process.'
5. The messages returned in the Execution Report do not indicate the specific objects that need updates. You must next go either to the **AutoPage Publication Planner** or the **Page Inspector** tab to see where the updates are needed. See the 'Updating Documents' section of this topic below for more information.

Important: Only content updates are recognized by the system. Template changes or pagination rule changes are not shown as updates needed in the Page Inspector or AutoPage Publication Planner.

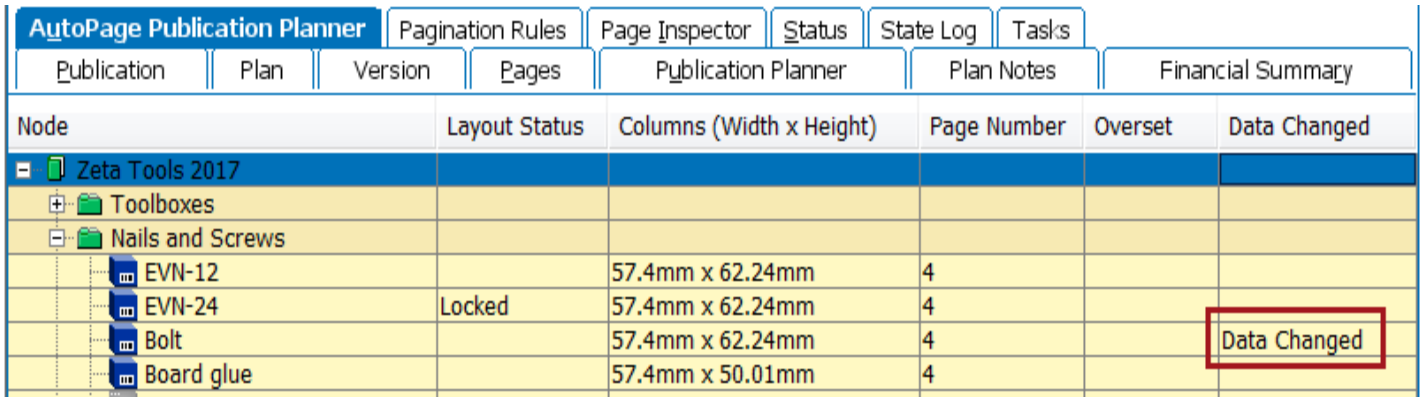
Check for Updates From the AutoPage Publication Planner

1. In the Tree, navigate to the relevant publication or section, then go to the **AutoPage Publication Planner** tab.
2. Right-click a section or subsection row, and then choose **Check for update needed.**

Note: Updates cannot be checked for an entire publication from the AutoPage Publication Planner; this can only be done from the Tree.

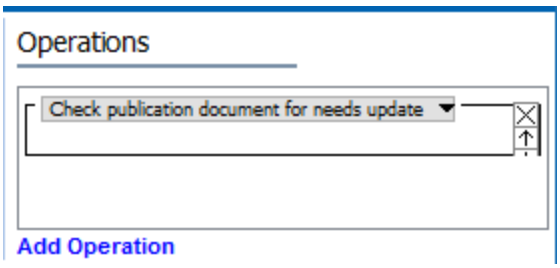


3. The **Check for Update Needed** dialog displays. Click **OK**.
4. An 'Autopage Batch Service' background process is kicked off that checks for changes in all mounted products in the selected section.
5. To monitor the progress of the background process on the BG Processes tab, click 'Go to process.'
6. Return to the AutoPage Publication Planner. If there are mounted objects whose content has changed in STEP since the page was last mounted, 'Data Changed' will display in the 'Data Changed' column.



Check for Updates Using Bulk Update

Documents can be checked for updates by running the bulk update operation 'Check publication document for needs update.' This operation is accessed in step 2 of the bulk update wizard ('Operations').



Checking for updates from the bulk update wizard is, for all intents and purposes, identical to checking for updates from the two previously documented methods in this topic. It is essentially the same functionality, just accessed from a different location.

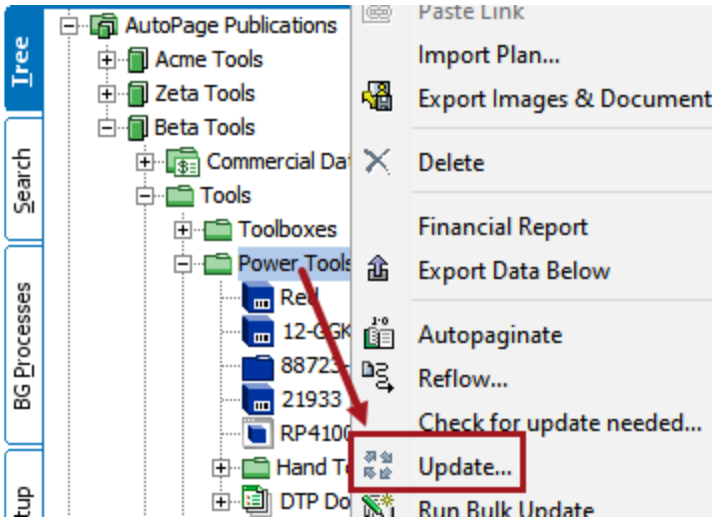
For information on how to access and use bulk update publishing operations, see **Publishing Operations for Bulk Updates** in the **Getting Started** / **STEP User Guide** documentation.

Updating Documents

Mounted pages saved back to STEP can be updated from the Tree by the following methods for users of any STEP Publisher license: **Update** and **Bulk Update**. Both methods work in a near-identical fashion, but **Update** is the simplest and most straightforward. In AutoPage, documents—and even individual mounted objects themselves—can be updated from the AutoPage Publication Planner.

Update Documents From the Tree

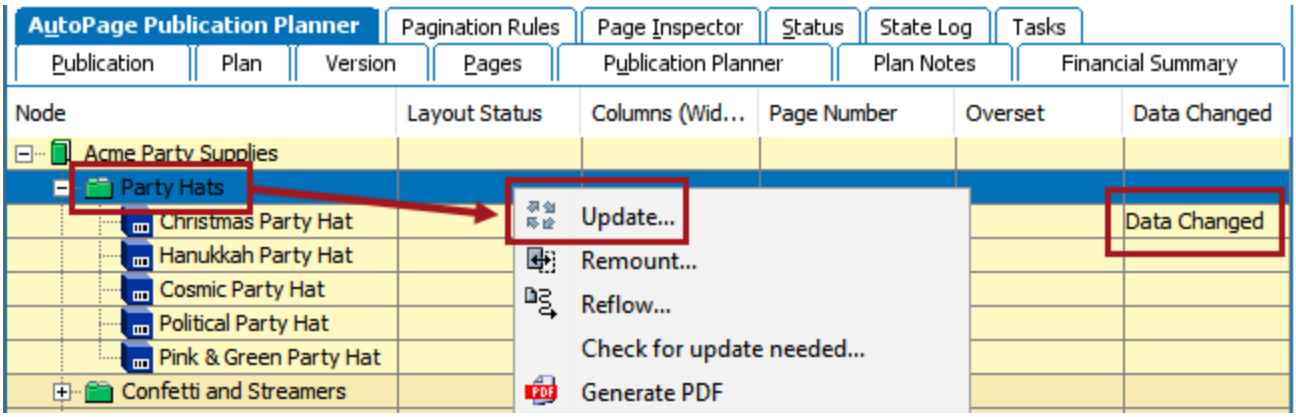
The **Update** feature is accessed by right-clicking on a publication, section, or DTP document object in the publication hierarchy.



Since 'Update' is valid for any STEP publishing component, as long as an InDesign server [IDS] is set up and integrated with the STEP application server, this functionality is detailed in the **Updating Documents in the Workbench** section of the **STEP'n'design** documentation.

Update Documents From the AutoPage Publication Planner

1. In the Tree, navigate to the relevant publication or section, then go to the **AutoPage Publication Planner** tab.
2. Right-click on the relevant section that contains the object(s) designated as 'Data Changed.' This step assumes that you have already run a check for updates, as detailed in the 'Checking for Updates' section of this topic above.

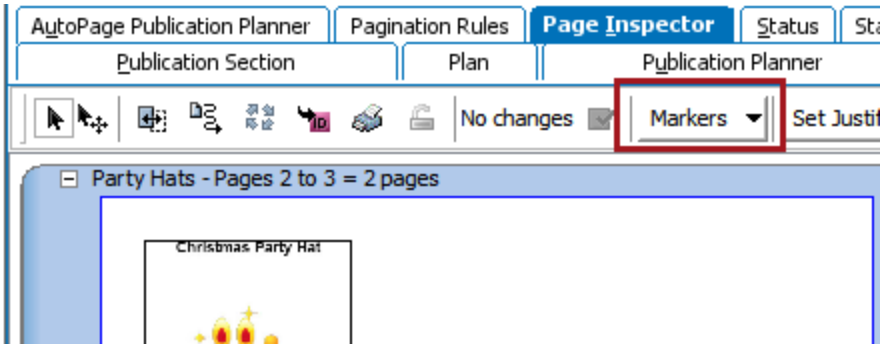


3. The 'Update contents of documents' dialog displays.
4. Follow the instructions as detailed in the **Updating Documents in the Workbench** section of the **STEP'n'design** documentation to complete the update process.

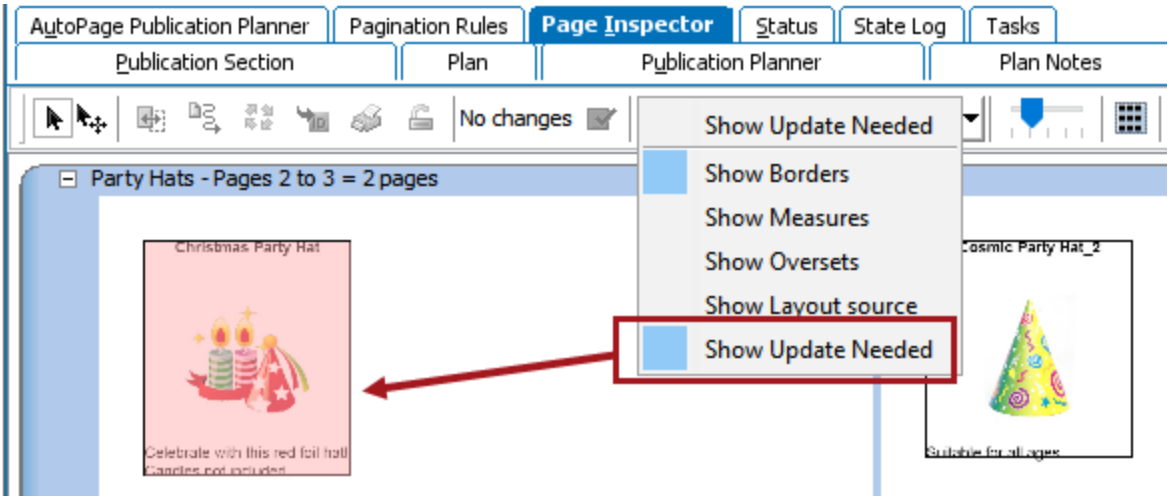
Update Documents From the Page Inspector

Once documents have been checked for needed updates, the AutoPage Page Inspector provides a visual indicator to let you know if an update needs to be run on a mounted object or page.

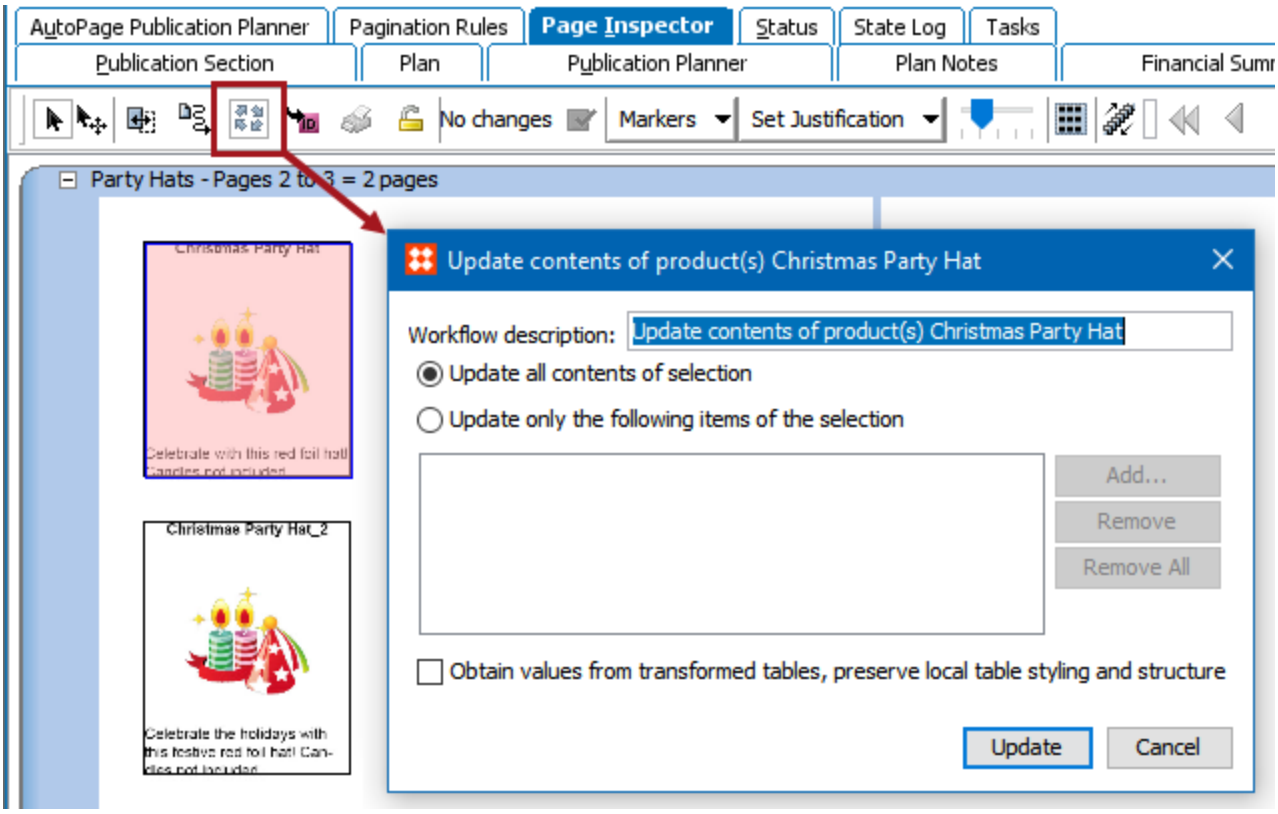
1. In the Tree, navigate to the relevant publication or section, then go to the **Page Inspector** tab.
2. Click on the **Markers** button.



3. Choose **Show Update Needed** from the dropdown list. Objects on the page that have out-of-date data will display in a pink-shaded box.



4. Click on an individual pink-shaded box—or on an entire page—that you would like to update. Boxes and pages may be multi-selected by holding down the Ctrl button while making selections.
5. Click the **Update** icon to launch the 'Update contents of' dialog.



6. Follow the instructions as detailed in the **Updating Documents in the Workbench** section of the **STEP'n'design** documentation to complete the update process.

Updating Documents Using Bulk Update

Bulk update is simply another method of accessing the same features available under 'Update'. For information on bulk update operations for STEP publication documents, see **Publishing Operations for Bulk Updates** in the **Getting Started** / **STEP User Guide** documentation.

Creating Tables of Contents in AutoPage

In AutoPage, tables of contents (TOCs) can be mounted on pages that typically appear at the beginning of publications and/or sections. When sorted alphabetically, they can be thought of as **section indexes**, as their intent is to alphabetically list the STEP names of all sections that appear within an entire publication and/or the names of all subsections that appear within a section. When sorted by page number, they can be thought of as true **tables of contents**, listing mounted objects in the actual order that they appear within the publication.

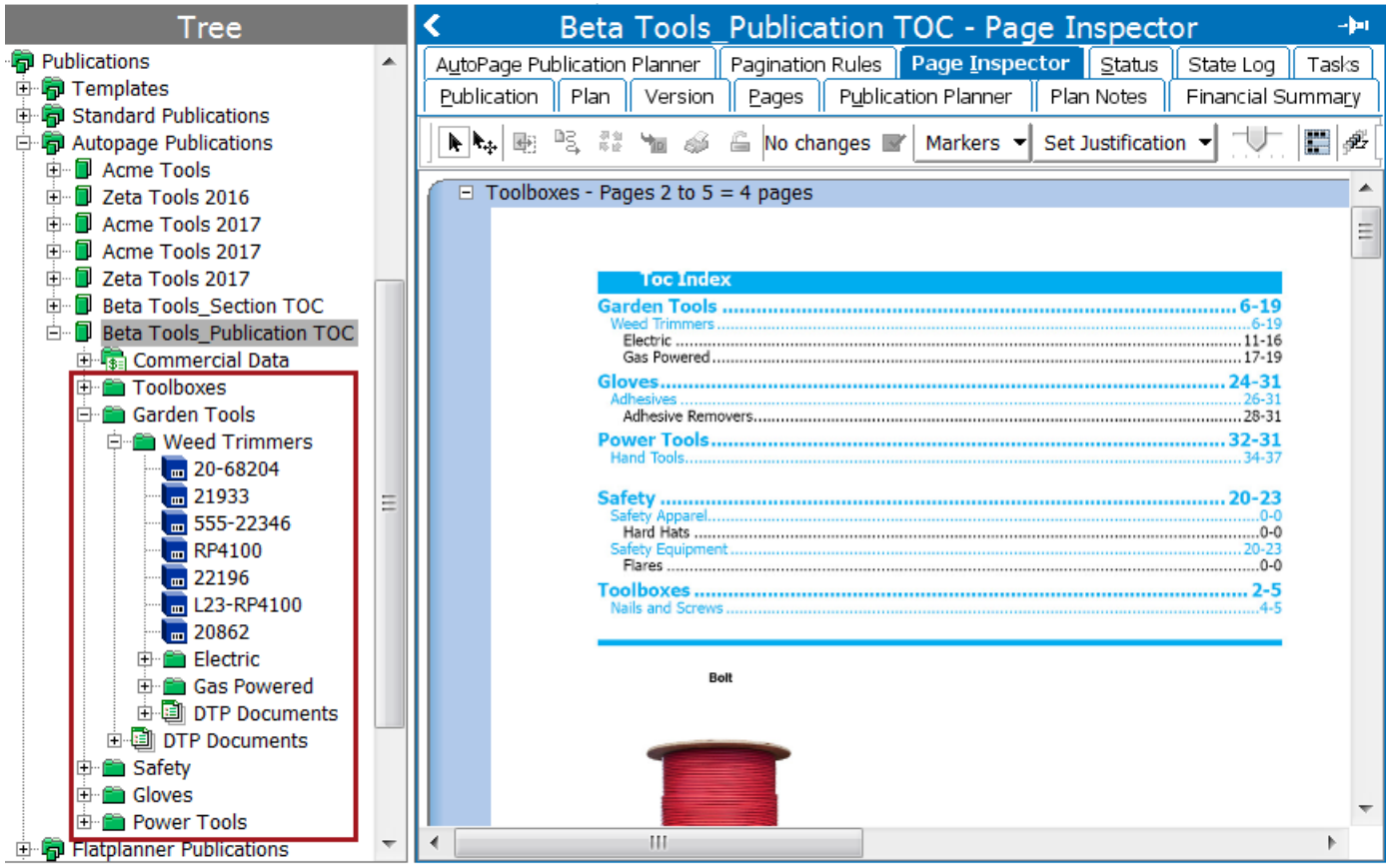
The mounting of tables of contents / section indexes in AutoPage is accomplished using a combination of the following:

- A specially configured product template
- 'Repeat' pagination rules
- 'Object layout' pagination rules

The product template that is used to create tables of contents uses tagging that mounts the following information:

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

Combining this product template with the aforementioned AutoPage pagination rules will mount the publication and/or section objects themselves onto pages. The following screenshot shows an example of an alphabetically sorted publication-level table of contents displayed in the AutoPage **Page Inspector**.



This topic focuses on how to configure the AutoPage **pagination rules** that will mount the table of contents in autopaginated publications. It does not describe how to create and configure the product template that is used in conjunction with these pagination rules. For information on how to create this product template, see the **Creating a Table of Contents Product Template** section of the **STEP'n'design** documentation. For additional information on AutoPage pagination rules, see **About AutoPage Pagination Rules**.

Rules for Publication-level Tables of Contents

To create a table of contents for an entire publication, the publication object itself is mounted. In order to mount a publication object, there must be at least one **repeat** pagination rule and one **object layout** pagination rule configured at the publication level.

The **Repeat rules** pagination rule group is configured to use the pagination rule condition **If first in publication** and the pagination rule action **Repeat publication**. The combination of this condition and action enable the publication object itself to be mounted at the beginning of the publication.

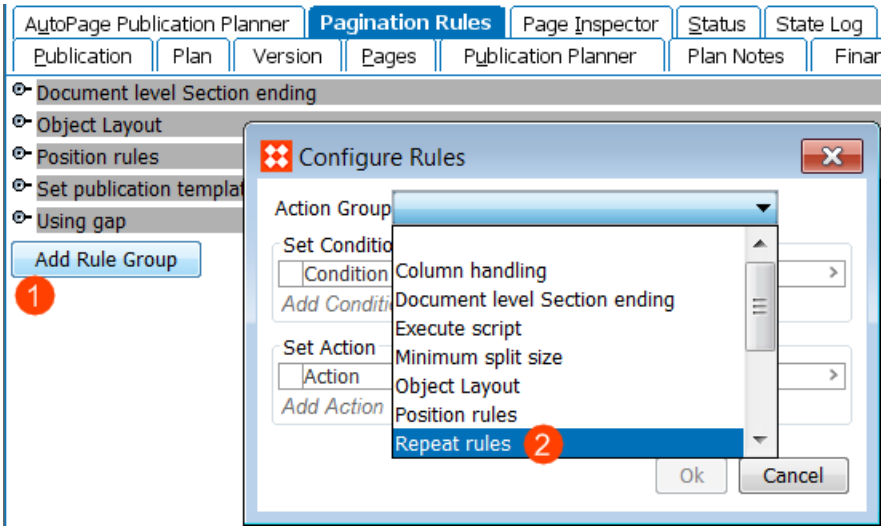
The **Object Layout** pagination rule group is configured to use the pagination rule condition **If the Object Type is** and the pagination rule action **Use product template**.

The following sections describe how to configure the combination of these rules using the relevant publication object type and a product template designed to create a TOC / section index.

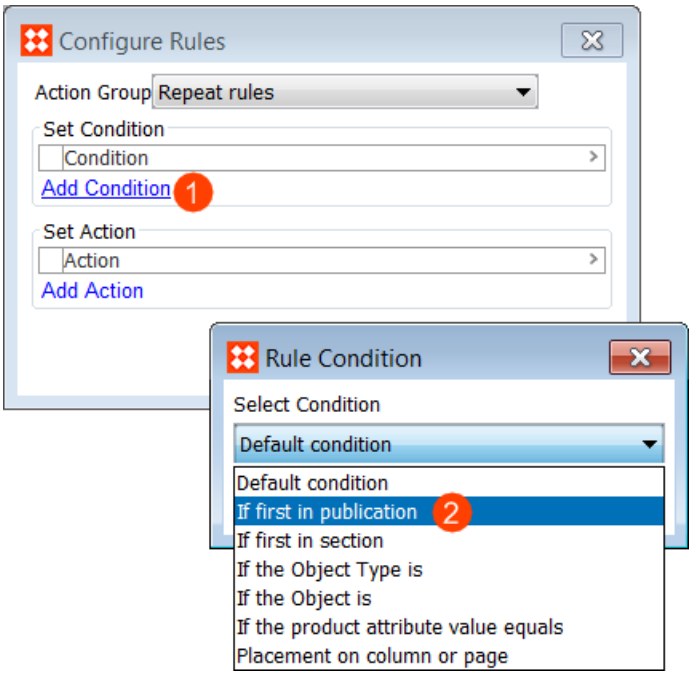
Repeat Rule

To configure the Repeat rule for the publication object, follow these steps:

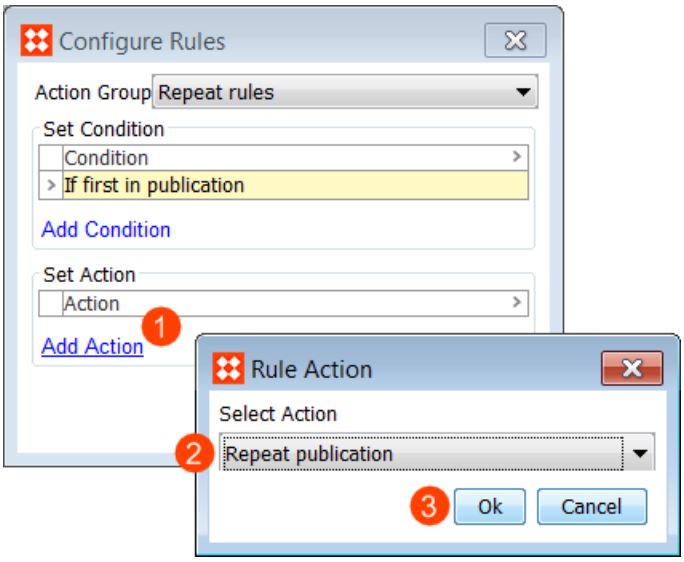
1. Navigate to the relevant publication in the publication hierarchy, then click on the **Pagination Rules** tab.
2. Click **Add Rule Group**. In the **Configure Rules** dialog that displays, select **Repeat rules** from the **Action Group** dropdown list.



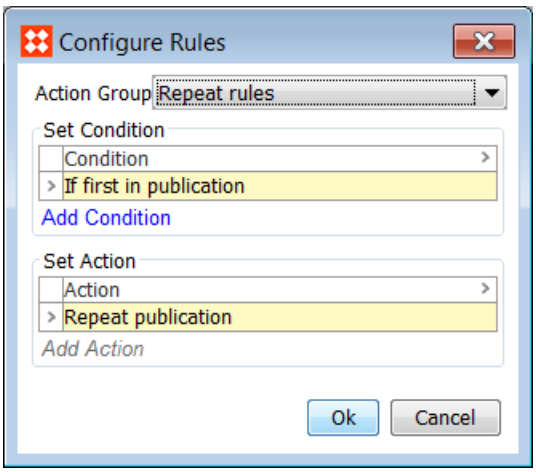
3. Next, click **Add Condition**. In the **Rule Condition** dialog that displays, select **If first in publication** from the **Select Condition** dropdown list, then click **Ok**. (The Ok button is not pictured; it is behind the Select Condition dropdown list.)



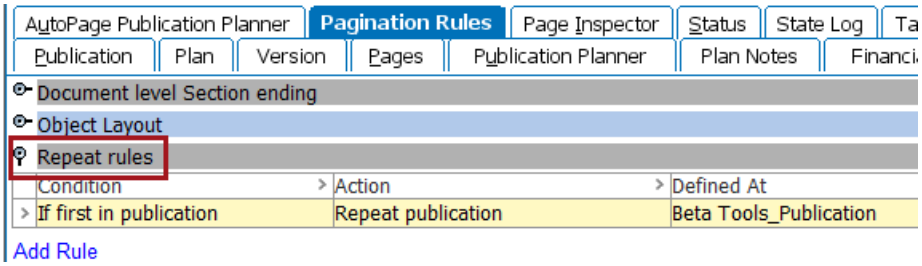
4. On the **Configure Rules** dialog, click **Add Action**. In the **Rule Action** dialog that displays, select **Repeat publication** from the **Select Action** dropdown list, then click **Ok**.



5. The Configure Rules dialog should now look like this. Click **Ok** to close the dialog.



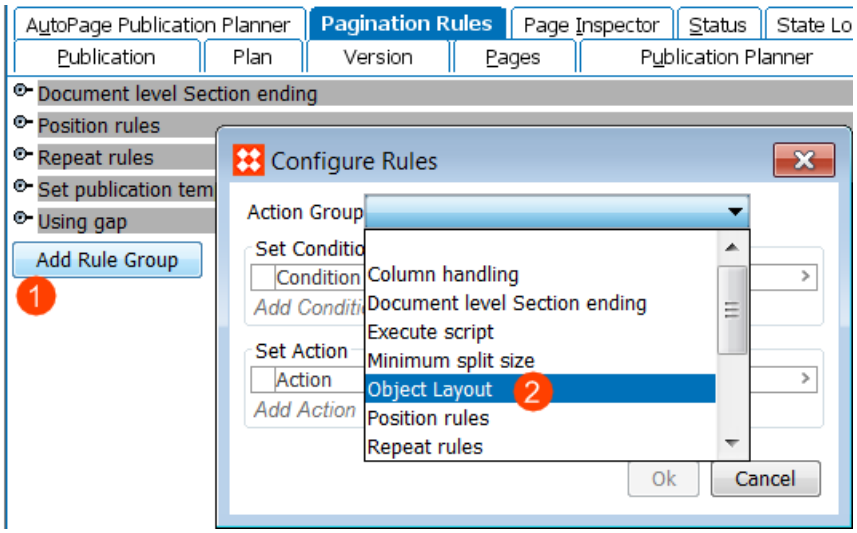
6. When configured properly, the Repeat rule for publications will look like this on the Pagination Rules tab:



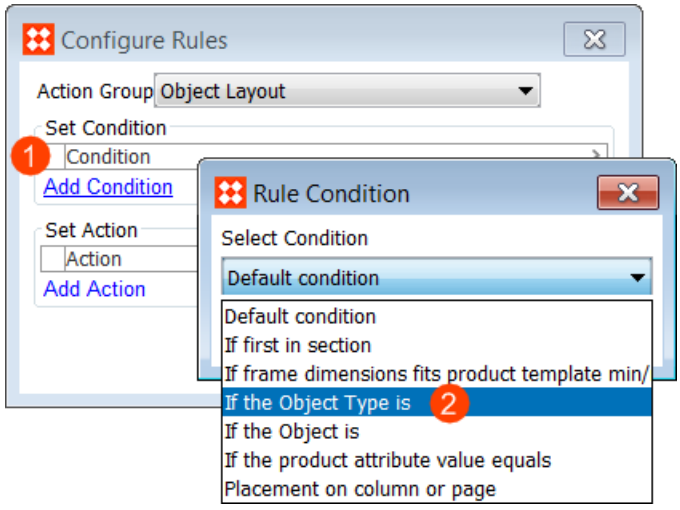
Object Layout Rule

To configure the Object Layout rule for the publication object, follow these steps:

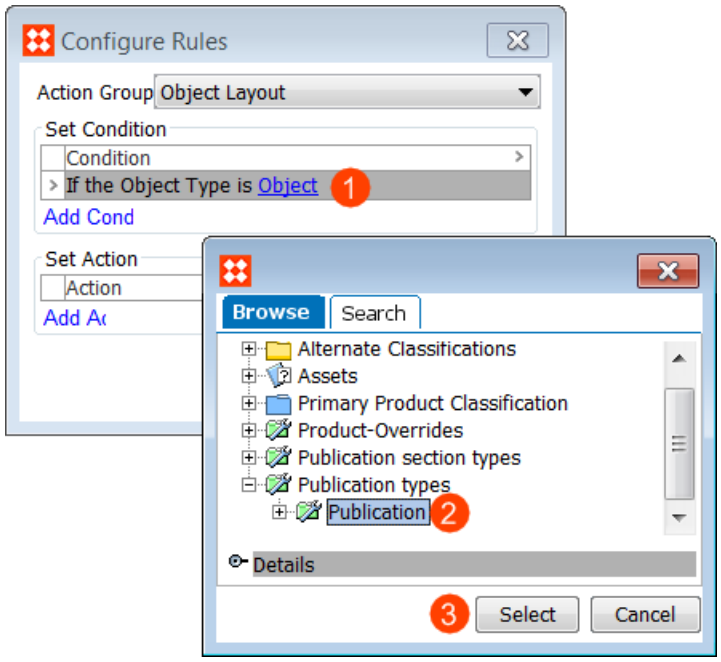
1. On the **Pagination Rules** tab, click **Add Rule Group**. In the **Configure Rules** dialog that displays, select **Object Layout** from the **Action Group** dropdown list.



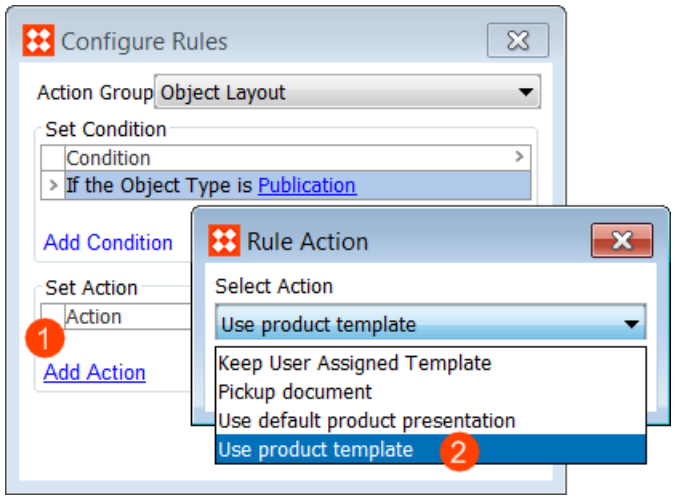
2. Next, click **Add Condition**. In the **Rule Condition** dialog that displays, select **If the Object Type is** from the **Select Condition** dropdown list, then click **Ok**. (The Ok button is not pictured below, as it is behind the Select Condition dropdown list.)



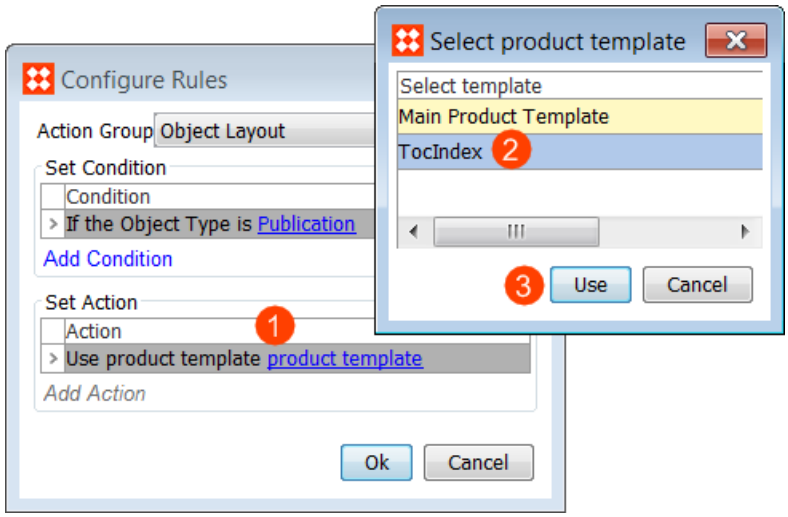
3. In the **Set Condition** area on the **Configure Rules** dialog, click **Object**. In the browse / search window that displays, select the relevant publication object type, then click **Select**.



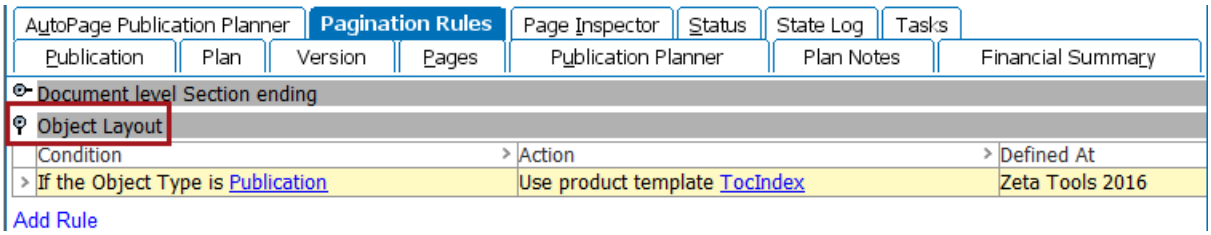
4. Next, click **Add Action**. In the **Rule Action** dialog that displays, select **Use product template** from the **Rule Action** dropdown list, then click **Ok**. (The Ok button is not pictured below; it is hidden behind the Select Action dropdown list.)



5. Click **product template**. In the **Select product template** dialog, choose the product template that has been configured to mount the table of contents / section index, then click **Use**.

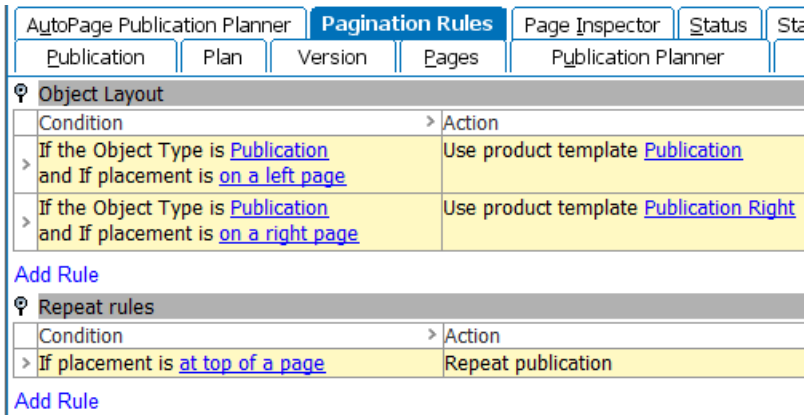


6. On the **Configure Rules** dialog, click **Ok**. The configured Object Layout rule for publications should look like this:



Additional Information on Publication Repeat Rules

The **Repeat publication** pagination rule action in the **Repeat rules** pagination rule group can also be used to pull information from publication objects other than TOCs. For example, the following screenshot shows a combination of Object Layout and Repeat rules that could be used to mount information from the publication object, such as its STEP name, at the top of each page in the publication. Other use cases could include the automatic creation of a cover sheet or confidentiality statement at the beginning of a publication.



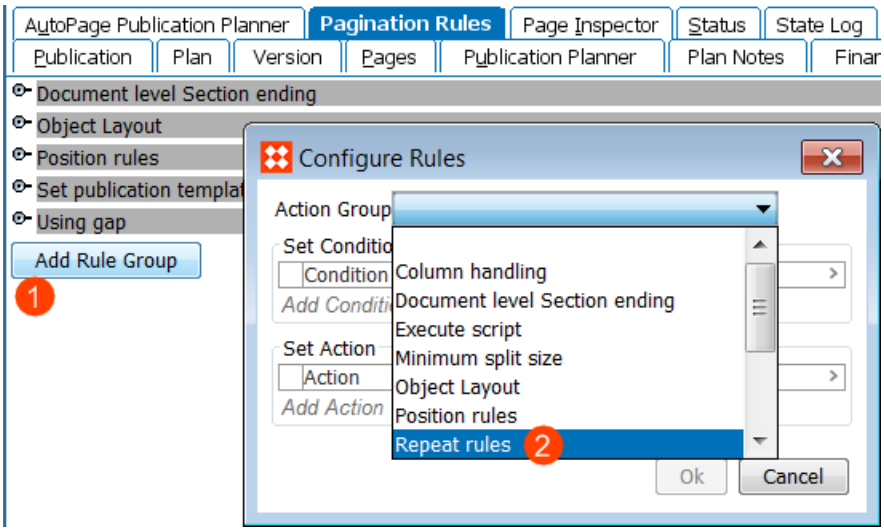
Rules for Section-level Tables of Contents

Mounting tables of contents at the section level in AutoPage uses a nearly identical setup to the mounting of tables of contents at the publication level. The difference is, instead of all sections in the entire publication being mounted at the publication level, each subsection within each section is mounted at the section level. These TOCs will appear at the beginning of every section instead of one time for the entire publication.

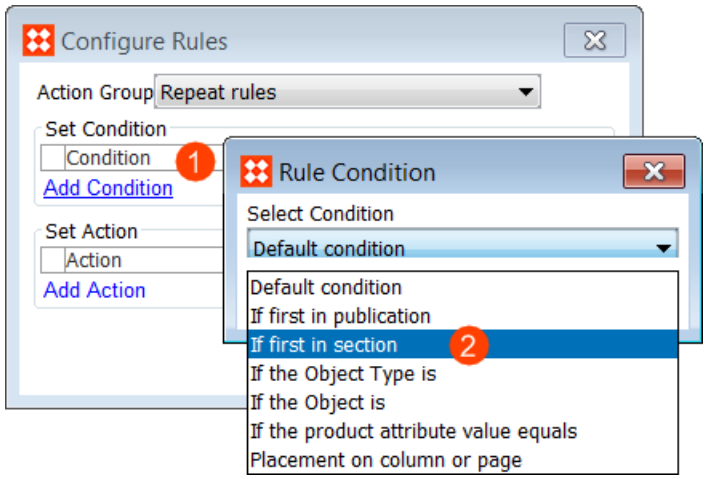
Repeat Rule

To add the Repeat Rule for sections, follow these steps:

1. Navigate to the relevant publication in the publication hierarchy, then click on the **Pagination Rules** tab.
2. Click **Add Rule Group**. In the **Configure Rules** dialog that displays, select **Repeat rules** from the **Action Group** dropdown list.



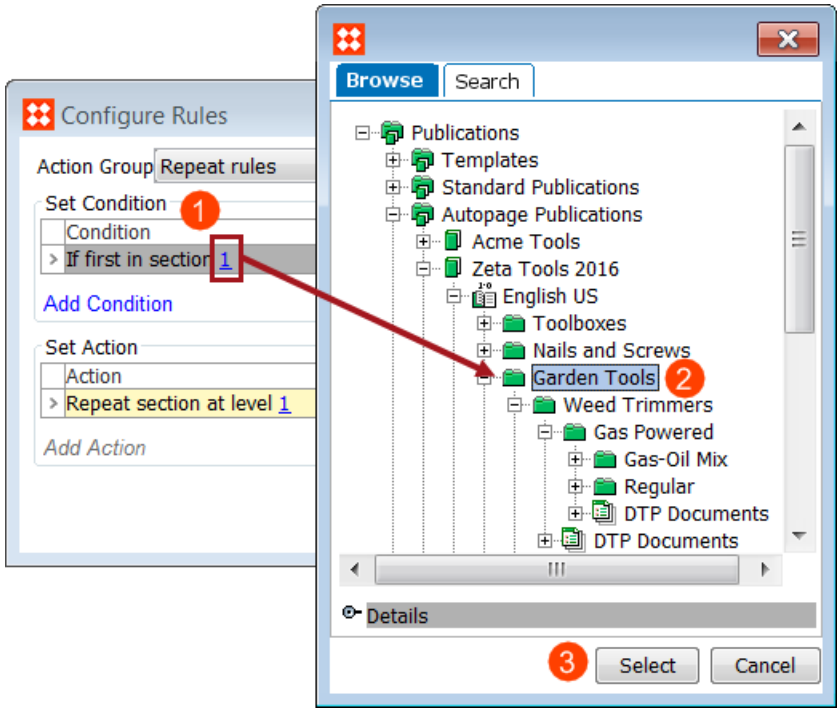
3. In the **Configure Rules** dialog, click **Add Condition**. In the **Rule Condition** dialog that displays, select **If first in section** from the **Select Condition** dropdown list, then click **Ok**. (The Ok button is not pictured, as it is behind the Select Condition dropdown list.)



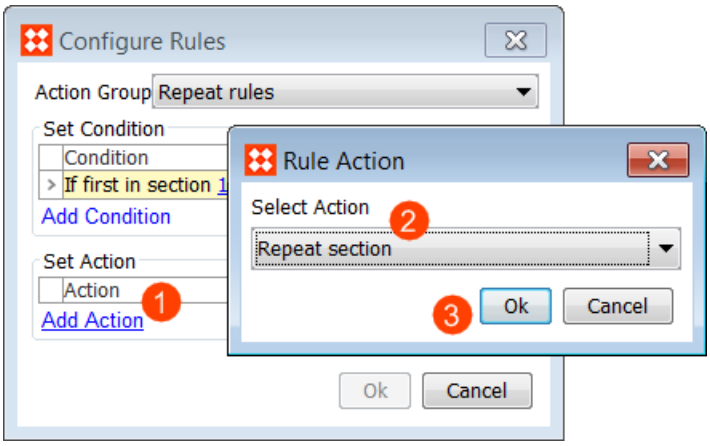
4. In the **Set Condition** area, click on the hyperlinked number, then choose a section on the level where you would like the table of contents / section index to mount. (It does not matter which specific section is chosen; just the *level* of the section.) In this example, the section Garden Tools is a first-level section. Choosing this first-level section will mount a table of contents at the beginning of every 'level 1' section throughout the publication, and these tables of contents will contain the names of the subsections, which in this example would be Weed Trimmers, Gas Powered, etc.

   If you would like the tables of contents to also mount at a subsection level, then choose a second-level section, and so on.

   Click **Select** when finished.

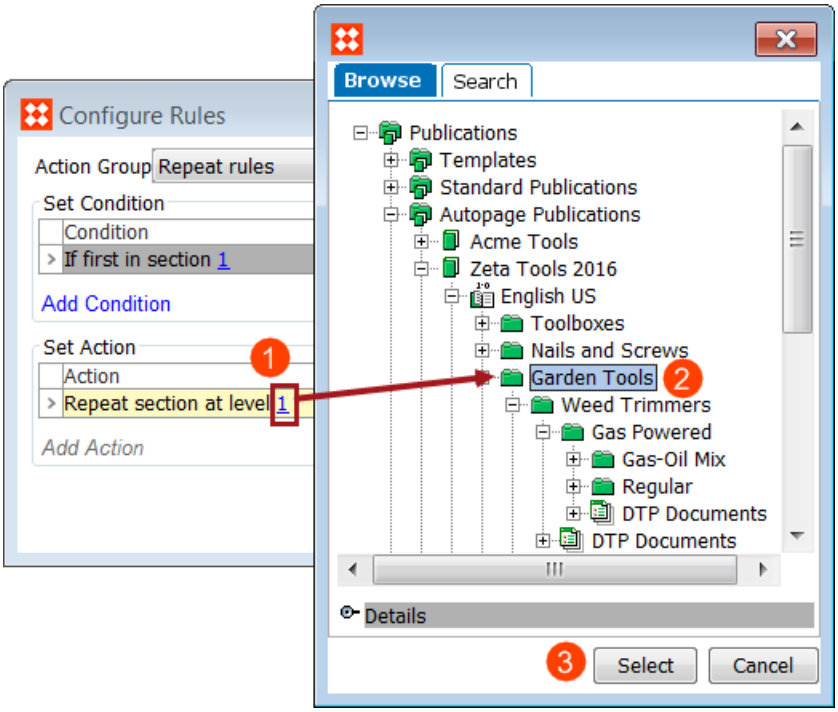


5. In the **Set Action** area, click **Add Action**. In the **Rule Action** dialog that displays, select **Repeat section** from the **Select Action** dropdown list, then click **Ok**.

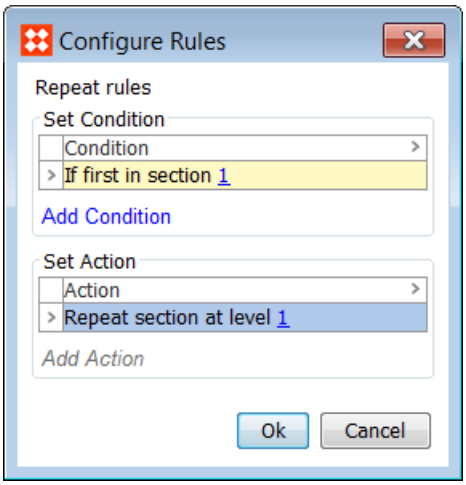


6. In the **Set Action** area, click on the hyperlinked number, then choose a section on the level where you would like the table of contents / section index to mount. This section level should match the level chosen for the 'if first in' condition.

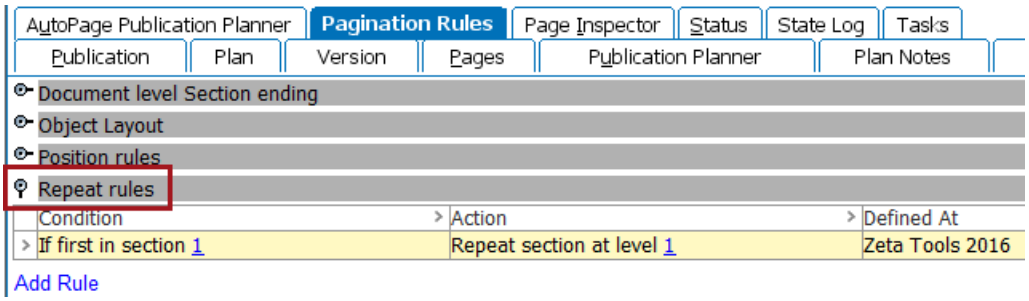
   If you would like the tables of contents to also mount at a subsection level, then choose a second-level section, and so on.



7. The Configure Rules dialog should now look like this. Click **Ok** to close the dialog.



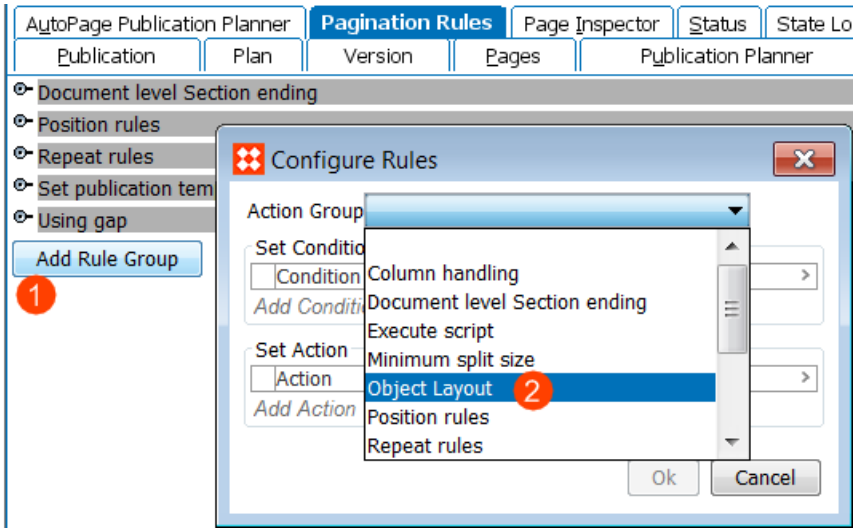
8. When configured properly, the Repeat rule for sections will look like this on the Pagination Rules tab:



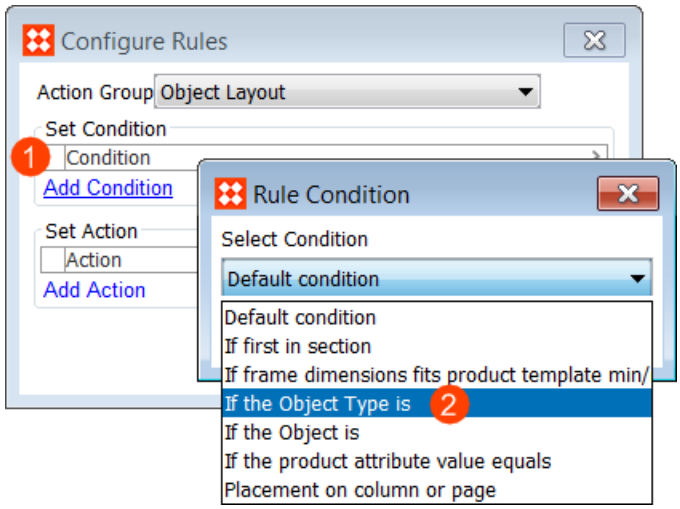
Object Layout Rule

To add the Object Layout rule for sections, follow these steps:

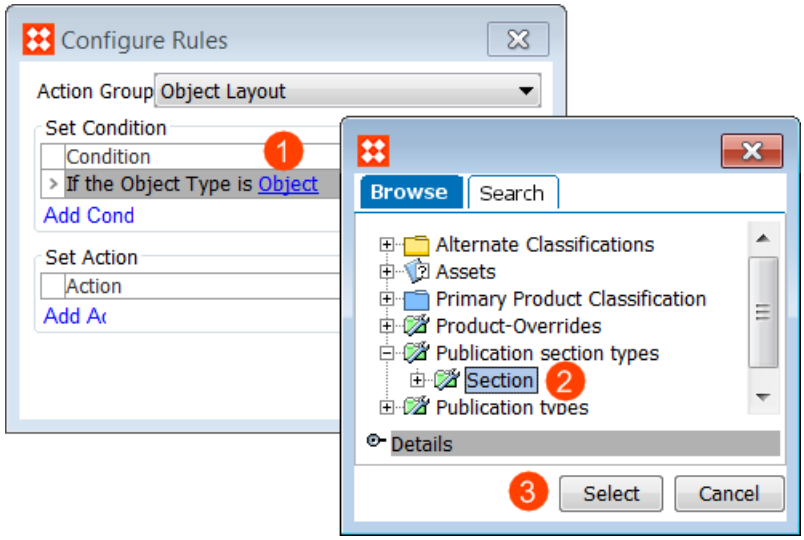
1. On the **Pagination Rules** tab, click **Add Rule Group**. In the **Configure Rules** dialog that displays, select **Object Layout** from the **Action Group** dropdown list.



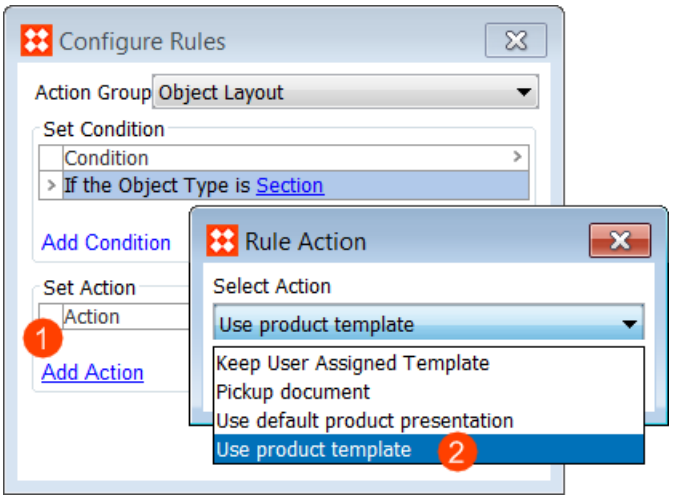
2. Next, click **Add Condition**. In the **Rule Condition** dialog that displays, select **If the Object Type is** from the **Select Condition** dropdown list, then click **Ok**. (The Ok button is not pictured below, as it is behind the Select Condition dropdown list.)



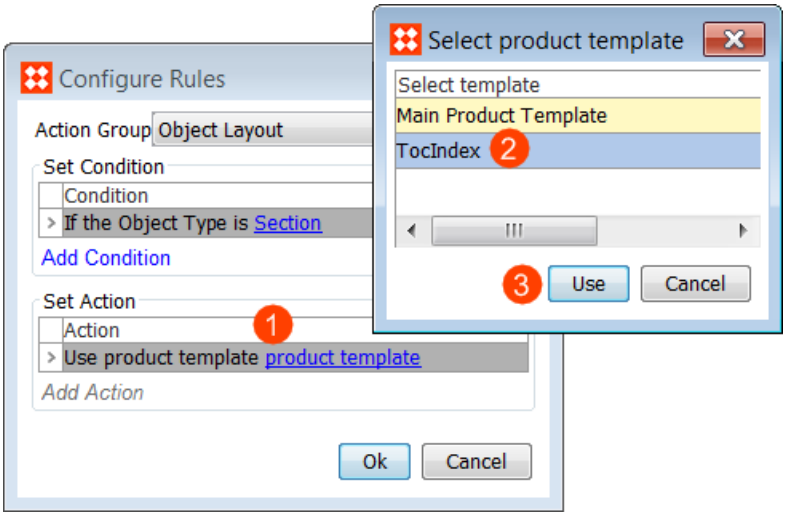
3. In the **Set Condition** area on the **Configure Rules** dialog, click **Object**. In the browse / search window that displays, select the relevant section object type, then click **Select**.



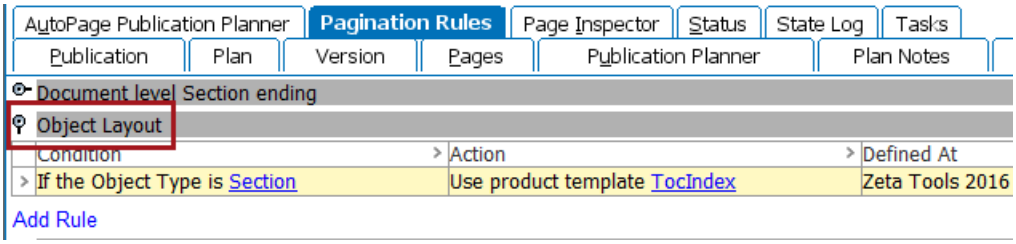
4. Next, click **Add Action**. In the **Rule Action** dialog that displays, select **Use product template** from the **Rule Action** dropdown list, then click **Ok**. (The Ok button is not pictured below, as it is behind the Select Action dropdown list.)



5. Click **product template**. In the **Select product template** dialog, choose the product template that has been configured to mount the table of contents / section index, then click **Use**.



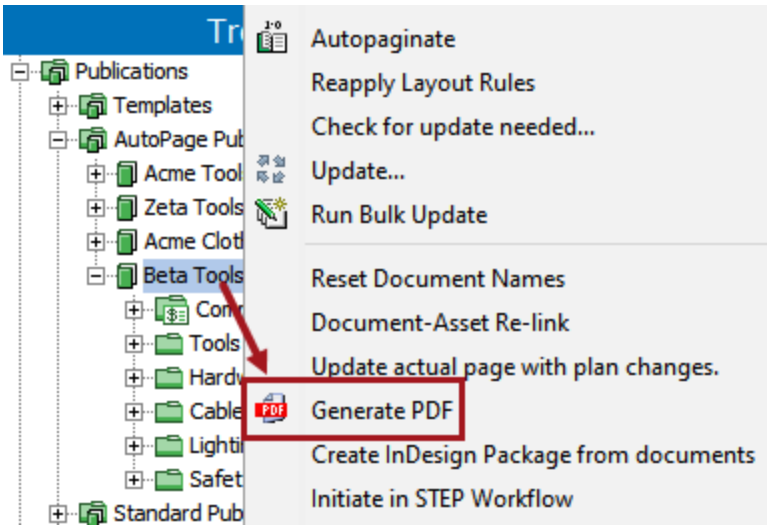
6. On the **Configure Rules** dialog, click **Ok**. The configured Object Layout rule for sections should look like this:



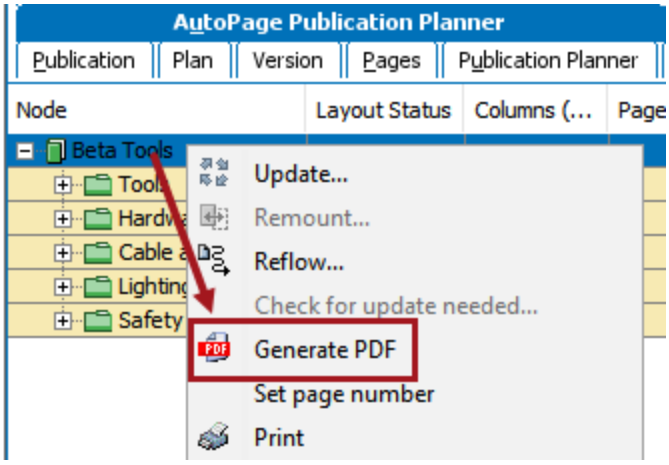
Generating PDFs for Proof Viewing

After your pages have been paginated and saved back to STEP, you can proof view the publication and paginated pages in a PDF to ensure that they look the way they should. PDFs can be generated for an entire publication at once or only for a selected section or subsection. PDFs can be generated from the **Tree** or the **AutoPage Publication Planner**.

1. In the **Tree**, navigate to the relevant publication or section, then right-click and select **Generate PDF**.



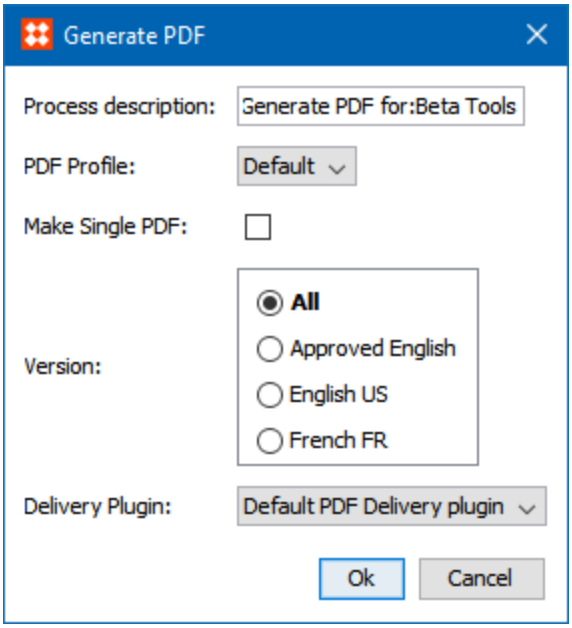
Or, from the **AutoPage Publication Planner**, select and right-click the preferred row, then choose **Generate PDF**.



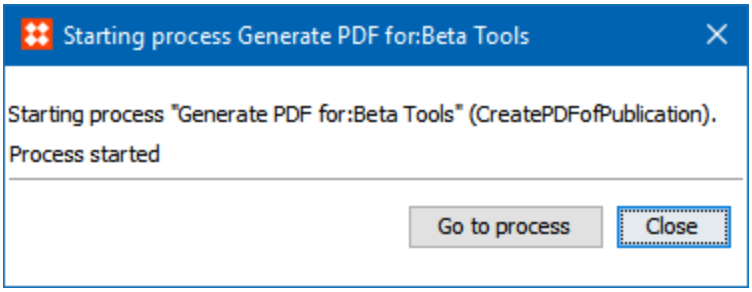
2. In the **Generate PDF** dialog, select the preferred profile from the **PDF Profile** dropdown list. Since PDF profiles are system dependent, the PDF profile is set to 'Default' if no special PDF profiles have been

configured for the system.

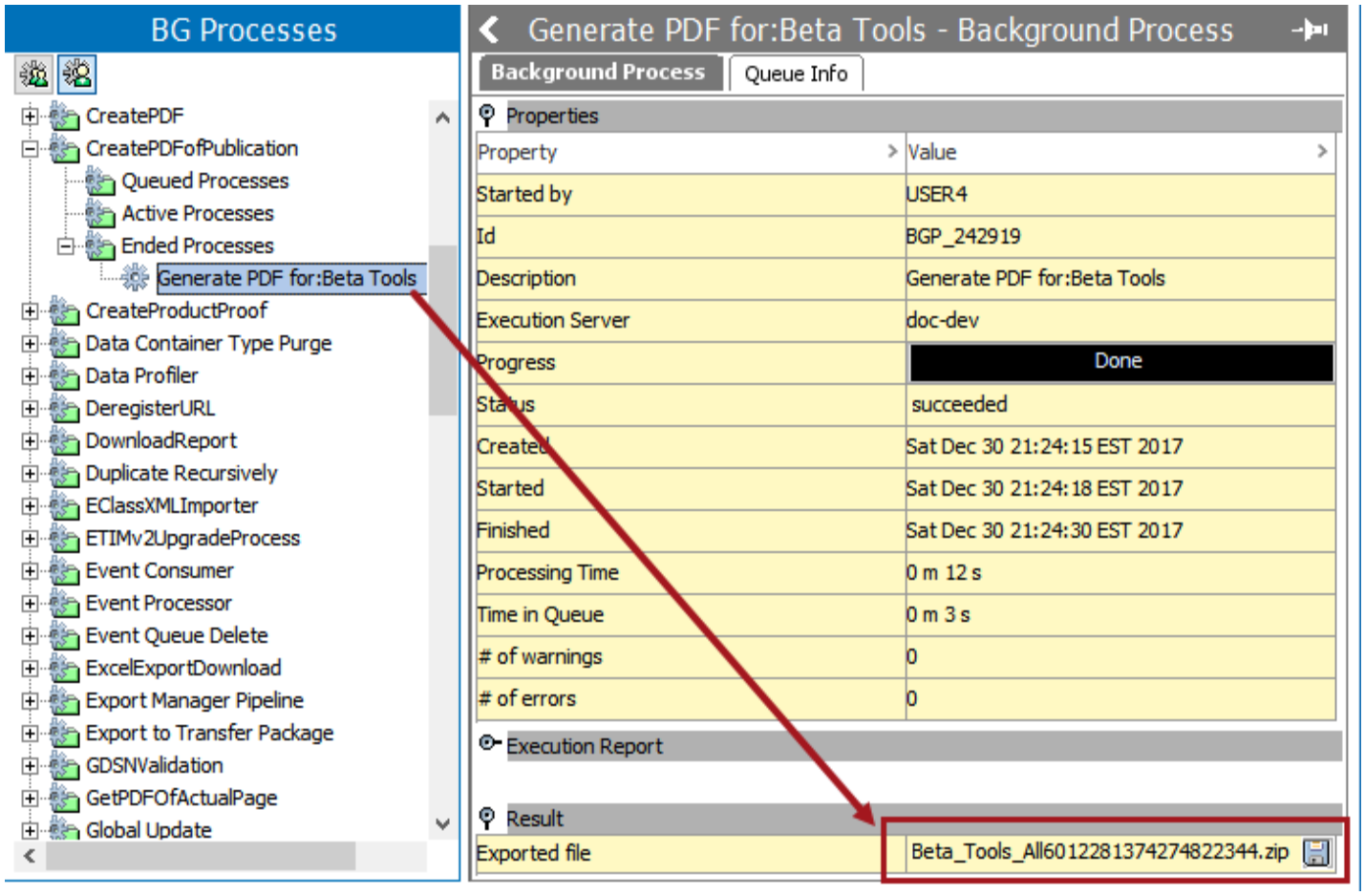
Note: Selecting 'All' for 'Version' does not automatically generate a layered PDF; all publication versions are embedded in a single layer within the PDF unless a special PDF profile has been configured. For information on how to create and store custom PDF profiles in STEP, see the **Setting up PDF Profiles (Presets) for the InDesign Server** topic in the **STEP'n'design** documentation.



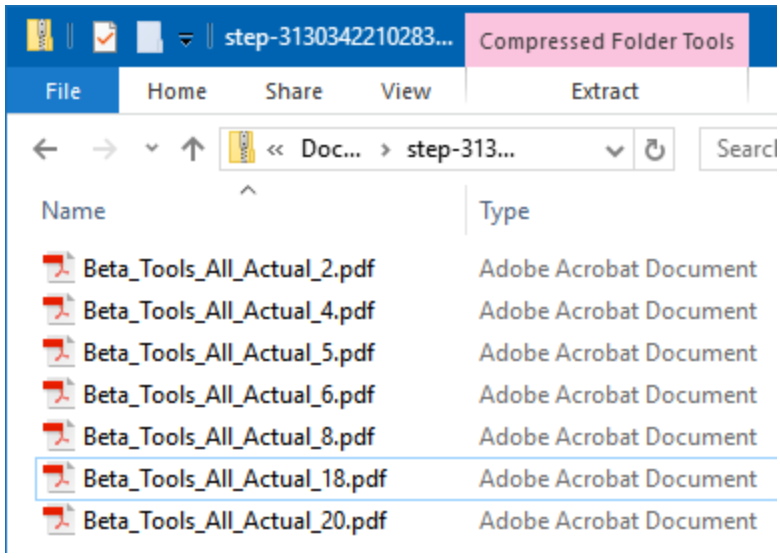
3. Check **Make single PDF** to include all documents in a single PDF file. If not selected, the resulting .ZIP file will contain a PDF of each individual DTP document.
4. Click **OK** to start the **Generate PDF** background process. Click **Go to process** to go to the BG Processes tab, or, click **Close** to exit the dialog.



5. The process occurs and the .ZIP file is delivered under the 'CreatePDFofPublication' node on the BG Processes tab.



6. The contents of the delivered .ZIP file should resemble the following, if 'Make Single PDF' was left unchecked.

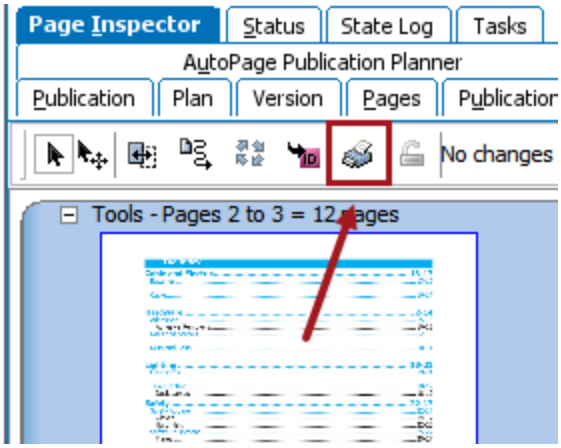


Printing Pages in AutoPage

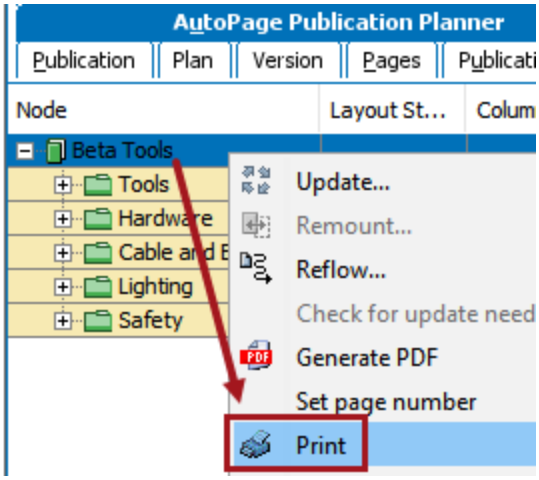
Sections and subsections may be printed from the **AutoPage Publication Planner** or from one or more pages from the **Page Inspector**.

Note: In order to print, a default printer must be installed on the InDesign server. Contact Stibo Systems for assistance if you need help configuring the InDesign server.

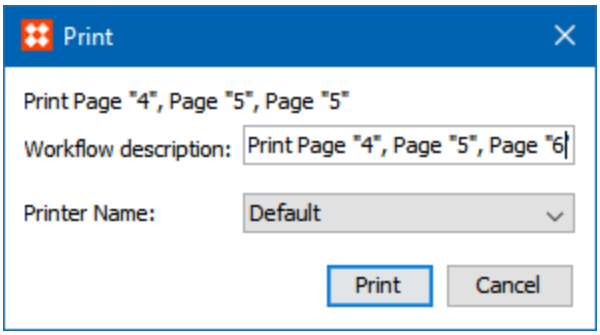
1. In the Tree, select the relevant publication, section or subsection.
2. If using the **Page Inspector**, select the page(s) that you want to print, then click the **Print** icon .



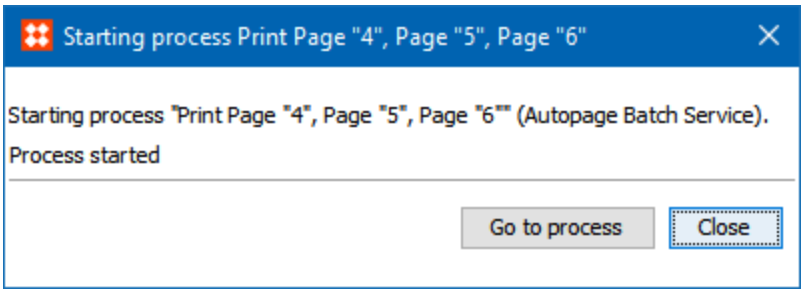
3. If using the **AutoPage Publication Planner**, select the sections or subsections that you want to print, then right-click and choose **Print**.



4. On the 'Print' dialog , click **Print**.



5. The 'Starting process Print Page' dialog displays. Click **Go to process** to monitor the progress of the Autopage Batch Service on the **BG Processes** tab.



Using the getInheritedPublicationValue Function in AutoPage

The calculated attribute function 'getInheritedPublicationValue' is used to pick up metadata (description) attribute values from section, publication, and publication group objects. Use cases for this function include the display of publication-related metadata on mounted pages created in AutoPage.

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

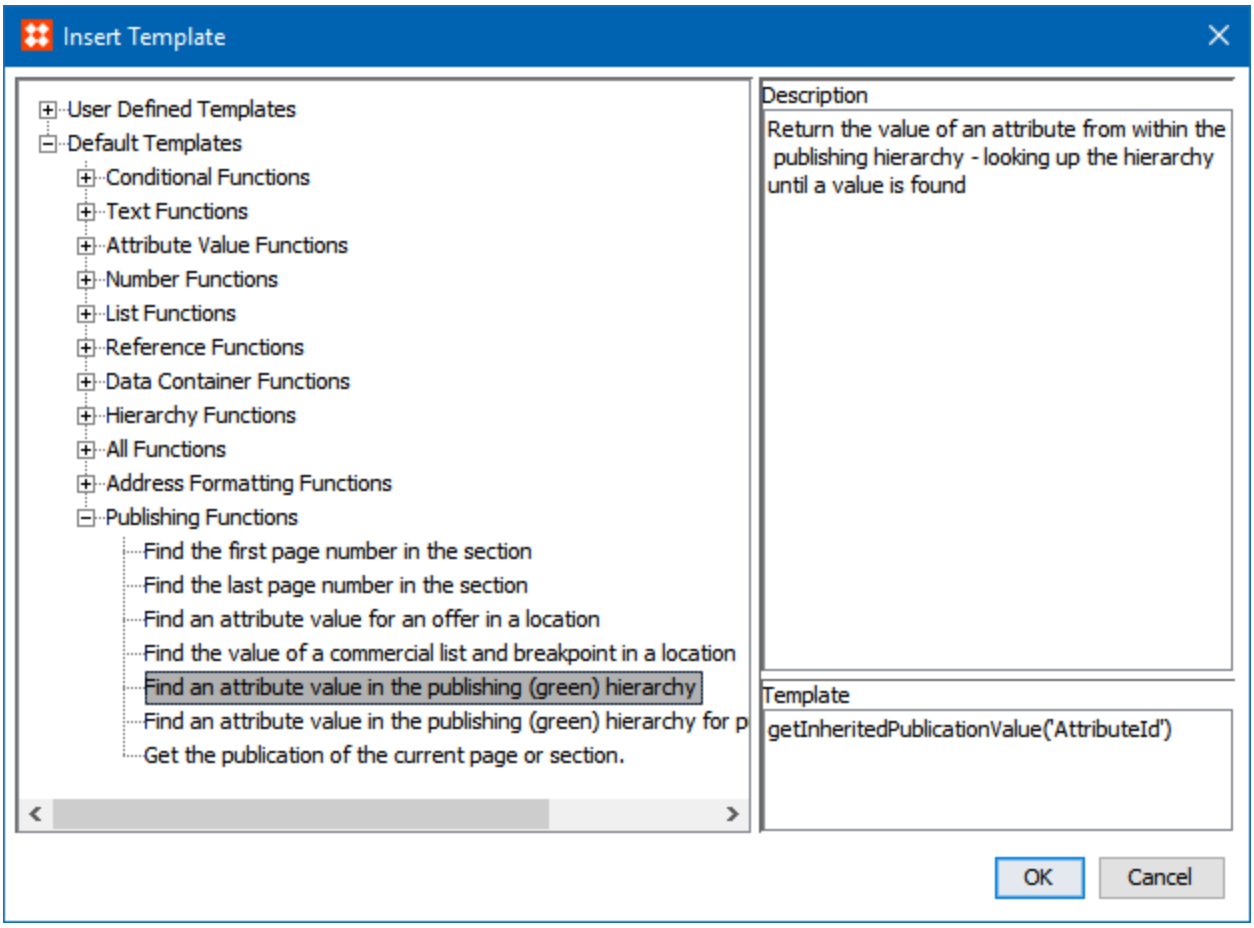
The following information describes how to use the 'getInheritedPublicationValue' function to pull metadata values from a section, a publication, and a publication group onto InDesign pages generated in AutoPage.

For general information on calculated attribute functions, see the **STEP Functions** topic in the **Calculated Attributes** section of the **System Setup** / **Super User Guide** documentation.

Configuring the Calculated Attribute(s)

Follow these steps to create a calculated description attribute using the 'getInheritedPublicationValue' function:

1. Create the Description attribute by the same method that you would create any other Description attribute. (See the **Creating Attributes** section of the **System Setup** / **Super User Guide** documentation for more information.)
2. After creating the attribute, right-click in the 'Value template' field on the Attribute tab and select **Edit Function**. The **Function Editor** will open.
3. Click **Insert Template**, then expand the **Publishing Functions** section of the Default Templates.
4. Select 'Find an attribute value in the publishing (green) hierarchy' and click OK. The **Insert Template** window will close.
5. In the **Function Editor**, replace ‘AttributeId’ with the ID of the metadata attribute that you would like to pull onto the page.



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

Sample Publication Metadata Attributes Configuration

In this example, three calculated attributes have been created: one to pick up values from section objects (ID = GetInheritedSectionValue), one to pick up values from publication objects (ID = GetInheritedPublicationValue), and one to pick up values from publication group objects (ID = GetInheritedPubGroupValue).

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

Publication Section | Plan | Publication Planner

Description

Name		Value
ID		108202
Name		Party Favors
Object Type		Section
Revision		0.1 Last edited by U
Path		Publications/Flatplan
Start section on page		1
Circulation	123	
Cover Photo Shot Due	31	2015-09-17
Effective Date	31	
Expiration Date	31	
Mail Date (same as Effective	31	
Section Theme	abc	Party Favors
Total Number of Items	123	

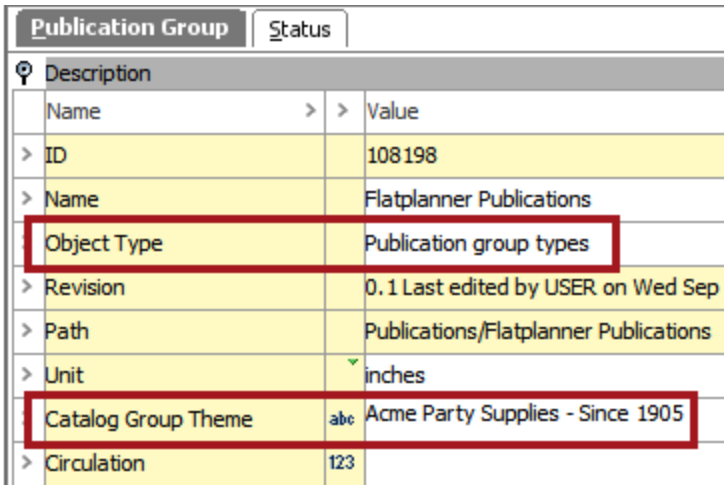
- GetInheritedPublicationValue [using the formula **getInheritedPublicationValue**('CatalogTheme')] will pick up the value of the description attribute CatalogTheme:

Publication | Plan | Version | Pages | Publication Planner

Description

Name		Value
ID		108199
Name		Spring Wedding Catalog
Object Type		Publication
Revision		0.5 Last edited by USER on Wed
Path		Publications/Flatplanner Publicat
Pages per spread		2
Auto page Document Level		1
Publication template		Wedding Pub Temp (109967)
Output engine		InDesign
DTP Queue		
Catalog Theme	abc	Spring Wedding
Circulation	123	

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



Configuring the Publication Template

Place the attributes on the publication template just as you would place attributes on a product template. See the **Text Frames in Product Templates** section of the **STEP Publisher** / **STEP'n'design** documentation for more information.

Note: Attributes must be placed on the page spread(s), not the master spread(s).

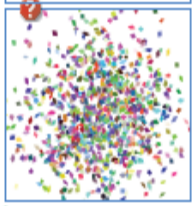
Mounted Page Results

After running the autopagination process on your publication, section, or subsection, the publication description attribute values will display on the mounted page in InDesign. For full instructions on the autopagination process, see the **Autopaginating Pages** topic.

Party Favors

Spring Wedding

Diamond Confetti



Enrich the event with multicolored diamond-shaped foil confetti!

Star Confetti

Create a heavenly event with multicolored star-shaped foil confetti!

Red Heart Confetti

Show your love with red heart confetti!

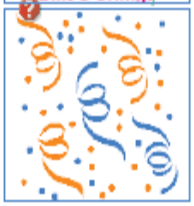
Confetti Maker

Do it yourself with this easy-to-use confetti maker!

4 Acme Party Supplies - Since 1905

Spring Wedding

Streamers - Blue & Orange



Make the wedding a party with these blue & orange streamers!

Streamers - Multi

Make the wedding a party with these multi-colored streamers!

Streamers - Purple

Make the wedding a party with these purple streamers!

Streamers - Hanging

Make the wedding a party with these hanging streamers!

Acme Party Supplies - Since 1905 5

Party Favors

Exporting and Importing AutoPage Publications in STEPXML

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

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

Importing an AutoPage Publication in STEPXML

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

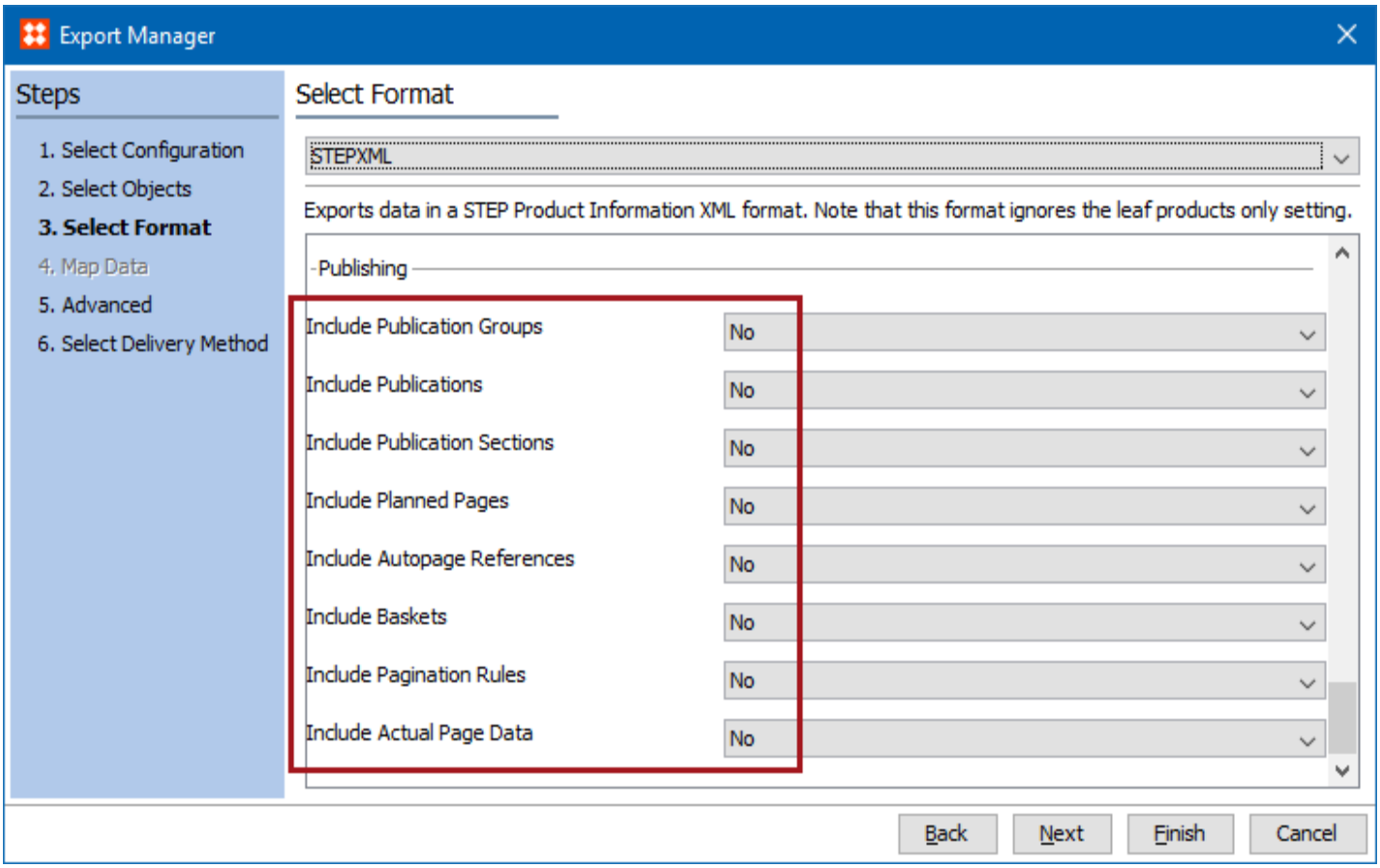
Instructions on how to import the STEPXML file itself are not detailed in this topic since the steps are the same as those for importing any other type of data into STEP using STEPXML. AutoPage publications can be imported manually using the Import Manager or automatically using an inbound integration endpoint (IIEP).

For more information, see the **Import Manager** and **Inbound Integration Endpoints** sections of the **Data Exchange** documentation.

Exporting an AutoPage Publication in STEPXML

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

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

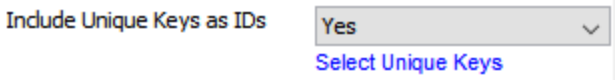


Note: The only options available for publication parameters are 'All' or 'None.' You may need to experiment with the combination of objects selected in the Select Objects step and the 'All' settings chosen in the Select Format step to ensure that you do not get too much or too little information in your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

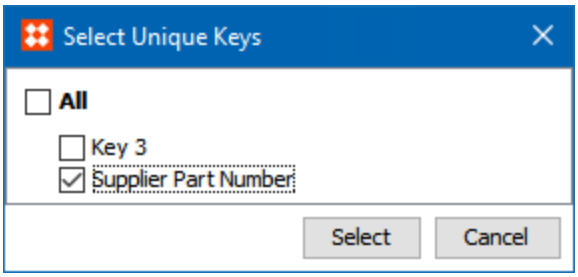
- The following parameters are relevant for **all** types of publications (standard STEP'n'design, Flatplanner, and AutoPage). Information on these parameters and the resulting tags in the STEPXML file are detailed in the **Exporting and Importing Publications in STEPXML** topic in the **STEP'n'design**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

Note: Include Autopage References is also relevant for standard 'drag and drop' publications if objects have been linked to the publication sections to organize them for mounting. However, it is more common practice to link objects to sections in AutoPage publications.

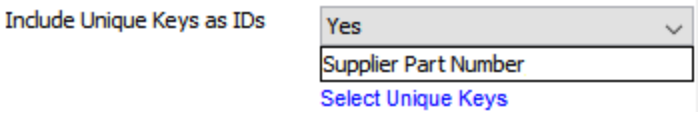
3. Select 'Yes' for **Include Unique Keys as IDs** if you are using unique keys to identify objects linked to your sections.



- To select the desired Unique Keys to use for this process, click the 'Select Unique Keys' link. The 'Select Unique Keys' dialog shows all active keys in the STEP system. Choose the keys to export, then click 'Select.'



- The selected Unique Keys will be shown in the Export Wizard.



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

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

File Example

The following STEPXML sample shows an export from an AutoPage publication that contains two versions, three sections, and metadata attributes on the publication and section objects. Each section contains linked objects—products, assets, and classifications.

```
<STEP-ProductInformation ExportContext="Context1" ContextID="Context1"
WorkspaceID="Main" UseContextLocale="false">
```

```
<PublicationGroups>
  <PublicationGroup UserTypeID="Publication group root" ParentID="108372"
ID="115722">
    <Publication UserTypeID="Default publication type"
MasterDocumentID="107822" DTPType="InDesign" ParentID="108372" ID="111508">
      <Name>Beta Tools</Name>
      <MetaData>
        <Value AttributeID="LastPageNumber" Derived="true">0</Value>
      </MetaData>
      <Version ContextID="Context1" WorkspaceID="Main" ID="111511">
        <Name>English US</Name>
      </Version>
      <Version ContextID="Context2" WorkspaceID="Main" ID="111510">
      <Name>France FR</Name>
      </Version>

<PaginationRules>PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ1bGVzIF
ZlcnNpb249IjMiLz4=</PaginationRules>
      <ProductTemplateLink ProductTemplateID="107821"/>
      <PublicationSection ID="111512" UserTypeID="Section">
        <Name>Power Tools</Name>
        <MetaData>
          <Value AttributeID="LastPageNumber" Derived="true">0</Value>
          <Value AttributeID="FirstPageNumber" Derived="true">0</Value>
        </MetaData>

<PaginationRules>PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ1bGVzIF
ZlcnNpb249IjMiLz4=</PaginationRules>
        <AutoPageProductLink ProductID="20803"/>
        <AutoPageProductLink ProductID="20805"/>
        <AutoPageProductLink ProductID="100703"/>
      </PublicationSection>
      <PublicationSection ID="111513" UserTypeID="Section">
        <Name>Hand Tools</Name>
        <MetaData>
          <Value AttributeID="LastPageNumber" Derived="true">0</Value>
          <Value AttributeID="FirstPageNumber" Derived="true">0</Value>
```

```
        </MetaData>

<PaginationRules>PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ1bGVzIF
ZlcnNpb249IjMiLz4=</PaginationRules>
        <AutoPageProductLink ProductID="20714"/>
        <AutoPageProductLink ProductID="20726"/>
        <AutoPageProductLink ProductID="21873"/>
      </PublicationSection>
      <PublicationSection ID="111514" UserTypeID="Section">
        <Name>Toolboxes</Name>
        <MetaData>
          <Value AttributeID="LastPageNumber" Derived="true">0</Value>
          <Value AttributeID="FirstPageNumber" Derived="true">0</Value>
        </MetaData>

<PaginationRules>PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ1bGVzIF
ZlcnNpb249IjMiLz4=</PaginationRules>
        <AutoPageProductLink ProductID="20881"/>
        <AutoPageProductLink ProductID="7829"/>
        <AutoPageProductLink ProductID="20682"/>
        <AutoPageAssetLink AssetID="22328"/>
        <AutoPageClassificationLink ClassificationID="IllustrationRoot"/>
      </PublicationSection>
     </Publication>
  </PublicationGroup>
</PublicationGroups>
```


AutoPage Information Included in the Export

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

Include Pagination Rules


```
<PaginationRules>
PD94bWwgdmVyc2lvbj0iMS4wIiBlbmNvZGluZz0idXRmLTgiPz4KPFJ1bGVzIFZlcnNpb249IjIiPgogID
xQYWdpbmF0aW9uUnVsZUdyb3VwPgogICAgPFBhZ2luYXRpb25SdWxlIFR5cGU9IlByb2R1Y3RUZW1wbGF0
ZUFjdGlvbiIgT3ZlcnJpZGRlbj0iMTA4MjAyLTEiIElkPSIxMDgyMDItMSI+CiAgICAgIDxDb25kaXRpb2
5zPgogICAgICAgIDxDb25kaXRpb24gSUQ9IkFsd2F5c0NvbmRpdGlvbiI+CiAgICAgICAgICA8UGFyYW1l
dGVycy8+CiAgICAgICAgPC9Db25kaXRpb24+CiAgICAgIDwvQ29uZGl0aW9ucz4KICAgICAgPEFjdGlvbn
M+CiAgICAgICAgPEFjdGlvbiBJRD0iUHJvZHVjdFRlbXBsYXRlQWN0aW9uIiBUeXBlPSJQcm9kdWN0VGVt
cGxhdGVBY3Rpb24iPgogICAgICAgICAgPFBhcmFtZXRlcnM+CiAgICAgICAgICAgIDxQYXJhbWV0ZXIgSU
Q9InRlbXBsYXRlSUQiPmNvbS5zdGliby5jb3JlLnBlcnNpc3RlbmNlLk5vZGVQTy0yMDg2NDAzPC9QYXJh
bWV0ZXI+CiAgICAgICAgICAgIDxQYXJhbWV0ZXIgSUQ9InRlbXBsYXRlVGl0bGUiPldlZGRpbmcgUHJvZC
BUZW1wPC9QYXJhbWV0ZXI+CiAgICAgICAgICA8L1BhcmFtZXRlcnM+CiAgICAgICAgPC9BY3Rpb24+CiAg
ICAgIDwvQWN0aW9ucz4KICAgIDwvUGFnaW5hdGlvblJ1bGU+CiAgPC9QYWdpbmF0aW9uUnVsZUdyb3VwPg
o8L1J1bGVzPg==</PaginationRules>
```


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

Include Autopage References

```
<PublicationSection ID="177998" UserTypeID="Section">
  <Name>Toolboxes</Name>
  <AutoPageClassificationLink ClassificationID="AssetsRoot"/>
  <AutoPageProductLink ProductID="18210"/>
  <AutoPageProductLink ProductID="18212"/>
  <AutoPageProductLink ProductID="18213"/>
  <AutoPageProductLink ProductID="18216"/>
  <AutoPageProductLink ProductID="100914"/>
  <AutoPageProductLink ProductID="100305"/>
  <AutoPageProductLink ProductID="18207"/>
  <AutoPageProductLink ProductID="18214"/>
  <AutoPageProductLink ProductID="18215"/>
  <AutoPageAssetLink AssetID="22328">
</PublicationSection>
```

Tag	Description
<AutoPageClassificationLink/>	Returns the STEP ID of the linked classification object
<AutoPageProductLink/>	Returns the STEP ID of the linked product object
<AutoPageAssetLink/>	Returns the STEP ID of the linked asset object

Include Unique Keys as IDs

```
<PublicationSection ID="109032" UserTypeID="Section">
  <AutoPageClassificationLink ClassificationID="">
    <KeyValue KeyID="SupplierPartNumber">123456G</KeyValue>
  </AutoPageClassificationLink>
  <AutoPageProductLink ProductID="">
    <KeyValue KeyID="SupplierPartNumber">20728</KeyValue>
  </AutoPageProductLink>
  <AutoPageProductLink ProductID="">
    <KeyValue KeyID="SupplierPartNumber">050-4215I</KeyValue>
  </AutoPageProductLink>
  <AutoPageProductLink ProductID="">
    <KeyValue KeyID="SupplierPartNumber">555-22346</KeyValue>
  </AutoPageProductLink>
  <AutoPageProductLink ProductID="">
    <KeyValue KeyID="SupplierPartNumber">555-223461</KeyValue>
  </AutoPageProductLink>
</PublicationSection>
```

Tag	Description
<AutoPageProductLink/>	Normally, this tag returns the STEP ID of the linked product object (for example, ProductID="12345"); however, when a unique key is used instead of a STEP ID, no value is returned (ProductID="").
<AutoPageClassificationLink/>	Normally, this tag returns the STEP ID of the linked classification object (for example, ClassificationID="12345"); however, when a unique key is used instead of a STEP ID, no value is returned (ClassificationID="").
<AutoPageAssetLink/> *(Not pictured in above screenshot)*	Normally, this tag returns the STEP ID of the linked asset object (for example, AssetID="12345"); however, when a unique key is used instead of a STEP ID, no value is returned (AssetID="").
<KeyValue>	Returns the ID of the unique key being used to identify the linked object (KeyID) along with the key value, which is inside the tags for the object.

Exporting and Importing AutoPage Publications in Publication Excel

AutoPage publications can be exported and imported in an Excel format called **Publication Excel**. The Publication Excel format supports all publication types: standard STEP'n'design ('drag and drop'), Flatplanner, and AutoPage.

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

The following screenshots show a sample Publication Excel spreadsheet for an AutoPage publication. The Publication Excel format only allows one object per row.

	A	B	C	D	E	F
1	PublicationID	PublicationName	PublicationType	PublicationTemplateID	PublicationInheritedUnit	PubPageTemplateID
2	127311	Zeta Tools	Default publication type	110116	inches	
3						

	G	H	I	J	K	L	M
1	VersionID	VersionName	VersionContextID	VersionWorkspaceID	LayerMappingTemplate	LayerMappingDocument	LayerMappingOwner
2							
3							
4	127314	French FR	Context2	Main			
5					France	France	true
6					Images	Images	false
7	127313	English US	Context1	Main			
8					USA	USA	true
9					Images	Images	true
10	127315	English UK	Context7	Main			
11					UK	UK	true
12					Images	Images	false

	N	O	P	Q	R	S	T	U	V	W
1	SectionLevel	SectionID	SectionName	SectionTypeID	MetaDataAttributeID	MetaDataAttributeValue	RuleSettings	ProductTemplateID	LinkedObjectID	LinkedObjectType
2							<Action ID="ProductTemplateAction" Type="ProductTemplateAction"			parametertemplateID=
3					CatalogTheme	Zeta Tools 2016				
4										
5								107821		
6								108803		
7	1	109032	Toolboxes	Section			<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadInde			
8					SectionTheme	Toolboxes				
9									20881	Product
10									7829	Product
11									20682	Product
12									6806	Product
13	1	109148	Nails and Screws	Section						
14					SectionTheme	Nails and Screws				
15									8108	Product
16									20674	Product
17									7829	Product
18									101118	Product
19									107628	Asset
20									107629	Asset
21	1	109033	Garden Tools	Section			<Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadInde			
22					SectionTheme	Garden Tools				
23	2	110370	Weed Trimmers	Section						
24	3	110379	Electric	Section						
25	4	110395	Corded	Section						
26	5	110399	25' Cords	Section						
27									109952	Product
28									109951	Product
29									109955	Product
30	5	110403	50' Cords	Section						
31									110049	Product
32									110050	Product
33									109953	Product
34									109954	Product

Information Included in the Export

A comprehensive guide to the contents of Publication Excel exports is located in the **Exporting Publications in Excel** section of the **STEP'n'design** documentation.

The following table outlines additional information included in a Publication Excel file used for an AutoPage publication.

Column Header	Description
RuleSettings	Pagination Rules used in the publication(s) and sections **Example**: <Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parametertemplateSpreadIndex="1"> <Condition ID="AlwaysCondition" /> </Action>

Column Header	Description
LinkedObjectKeyID	The ID of the unique key used to identify the product, asset, or classification object linked into the section(s).
LinkedObjectID	STEP ID of the product, asset, or classification object linked into the section(s). If a unique key is being used instead of a STEP ID to identify linked objects, then the value of the unique key will display instead.
LinkedObjectType	Value will either be 'Product', 'Asset', or 'Classification' depending on whether a product, asset, or classification object is linked to the section(s). 'Product', 'Asset', and 'Classification' are generic terms and do not specify the exact object types of the product, asset, or classification.

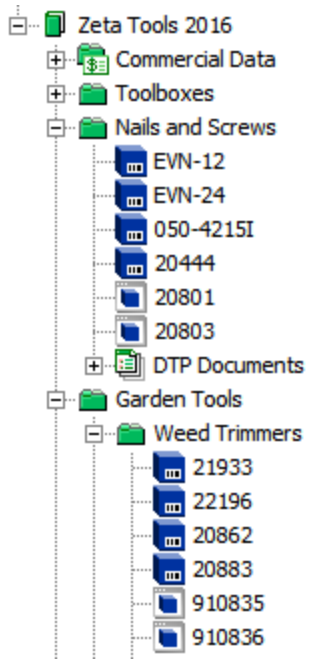
Location of AutoPage Publication Excel Information in STEP

A comprehensive guide to the location of publication information in the STEP workbench that is included in a Publication Excel sheet is located in the **Exporting Publications in Excel** section of the **STEP'n'design** documentation.

The following subsections describe the additional information included in a Publication Excel file used for an AutoPage publication.

Linked Products and Assets

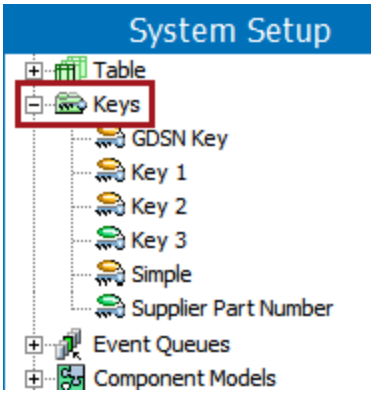
The pictured sample AutoPage publication contains product objects and asset objects linked to the publication sections. Note that classification objects can also be linked to AutoPage publications, but this is uncommon.



- The **LinkedObjectKeyID** column (not pictured in the previous spreadsheet screenshots) contains the ID of the unique key used to identify the product, asset, or classification object linked into the section(s).

LinkedObjectKeyID	LinkedObjectID
SupplierPartNumber	22487-123
SupplierPartNumber	22487-12
SupplierPartNumber	20444
	107628
	107629

Keys are located on the System Setup tab. For information on unique keys, see the **Unique Keys** section of the **System Setup** / **Super User Guide** documentation.



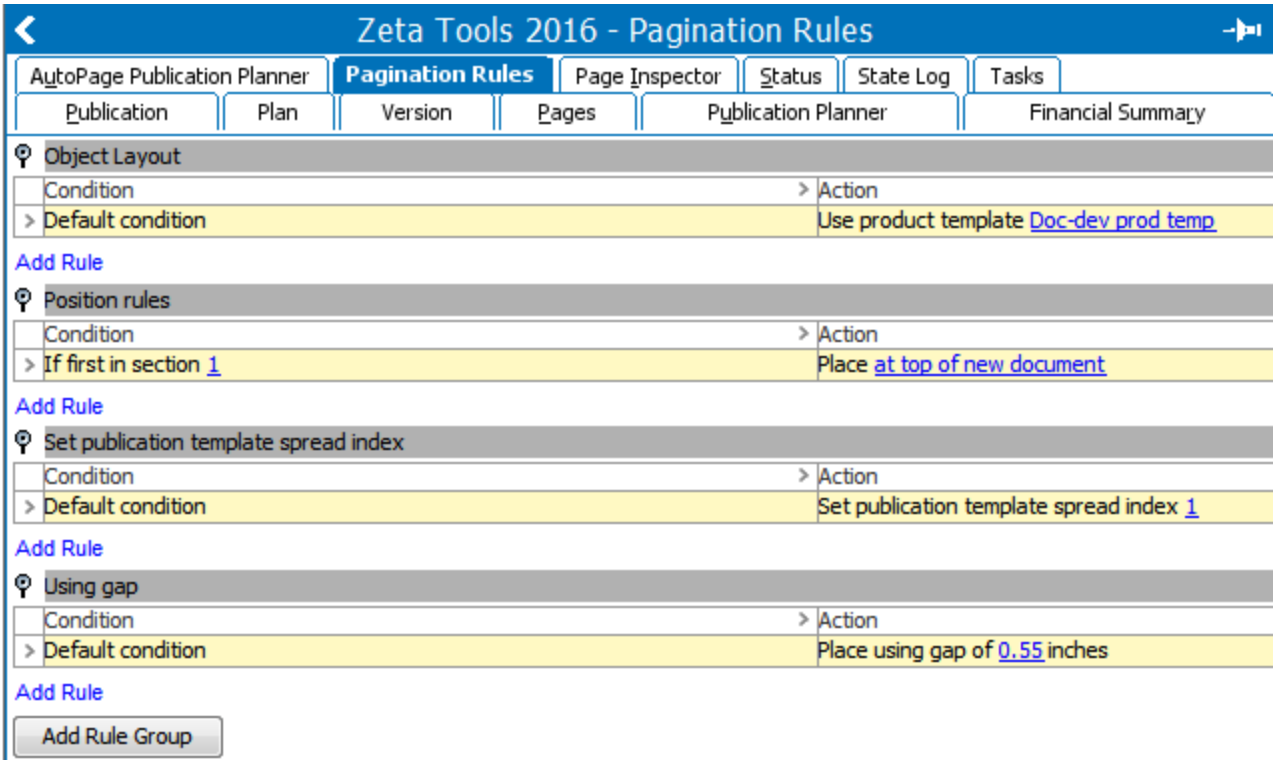
- The **LinkedObjectID** column contains the STEP ID(s) of the objects linked to each section. If a unique key is being used instead of a STEP ID to identify linked objects, then the value of the unique key will display instead.

Pagination Rules Tab

STEPXML code for **Pagination Rules** linked to the publication and/or sections are included in the **RuleSettings** column. The screenshot below shows four pagination rules set at the top level of the publication.

If a publication has no pagination rules set yet, the **RuleSettings** column will not appear on the exported sheet.

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

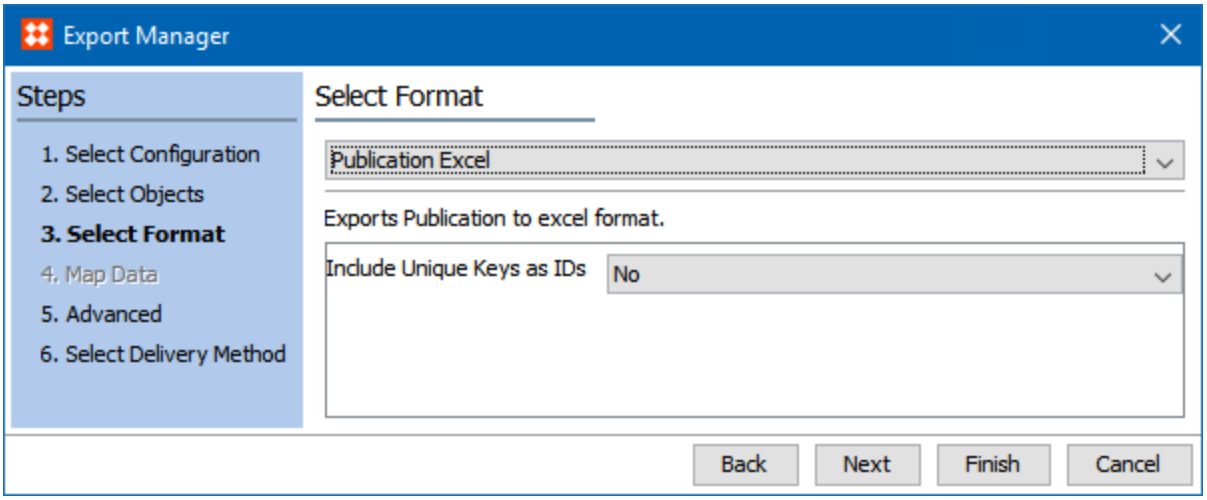


Exporting AutoPage Publications in Publication Excel

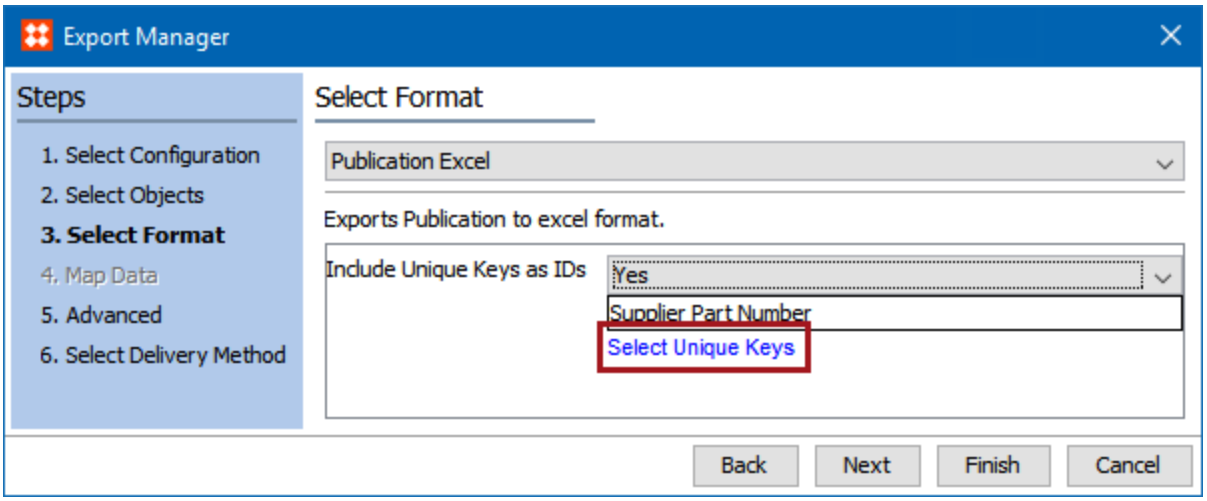
The steps to export an AutoPage publication in the Publication Excel format are nearly identical to those of exporting a standard 'drag and drop' publication except some additional information is included for AutoPage publications—pagination rules and the identifiers used for linking objects to sections (STEP ID and/or unique key values).

1. Follow the initial steps for exporting a Publication Excel sheet as outlined in the **Exporting a Publication Excel Sheet** topic in the **STEP'n'design** documentation.
2. On the Select Format screen of the Export Manager, choose **Publication Excel** from the dropdown list. If you are not using unique keys to identify the objects (typically *products*) that are linked into the publication's

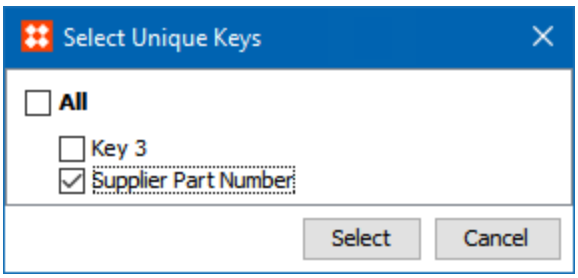
sections, click **Next**.



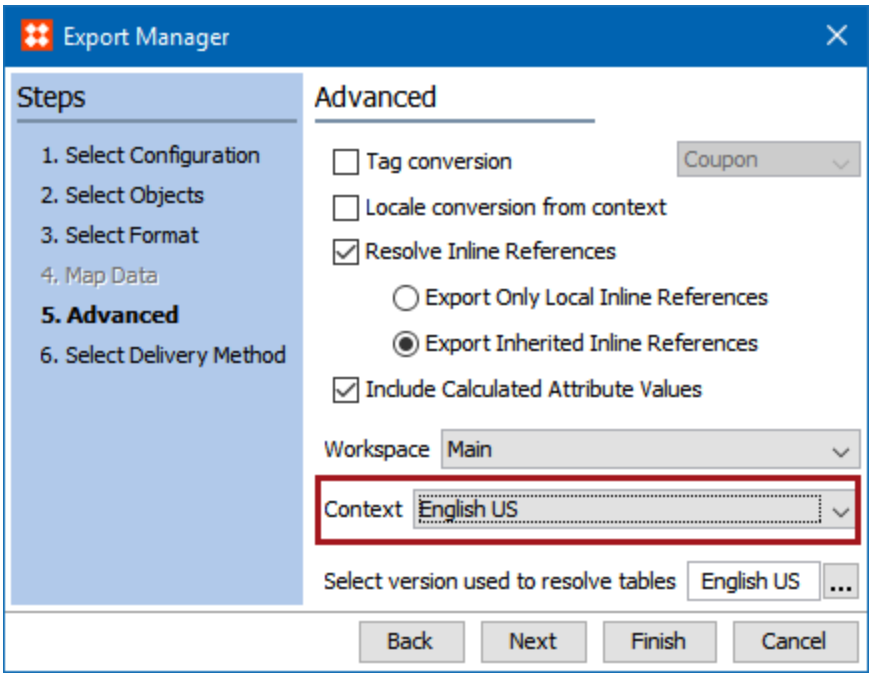
- If you *are* using unique keys to identify the objects linked into the publication, select 'Yes' from the 'Include Unique Keys as IDs' dropdown list, then click **Select Unique Keys**.



- On the Select Unique Keys dialog, all associated keys on the objects linked into the publication are displayed. Check the box(es) for the unique key values that should be included in the export, then click **Select**.



3. Since data does not need to be mapped for the Publication Excel format, the Map Data screen is skipped.
4. On the Advanced screen, choose a **Context** if you have dimension-dependent data section names or page names and need to see them in a particular language. All other settings may be ignored. Click **Next**.



5. Choose **File** as the Delivery Method in Step 6, then click **Finish**.
6. On the **Save Export Configuration** screen, check 'Save Options' if you would like to save the Export configuration.
7. Click **OK**, then retrieve the Excel file.

Considerations and Limitations

- Though multiple publications may be exported in a single Publication Excel file, multiple publications may not be *imported* in the Publication Excel format. To import multiple publications at once, the STEPXML format must be used. For information on importing publications in STEPXML, see the **Exporting and Importing Publications in STEPXML** topic.
- Support for Publication Excel export is 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.

Importing AutoPage Publications in Publication Excel

The steps to import or update an AutoPage publication using a Publication Excel sheet are identical to those of importing a Publication Excel for any other publication type.

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

Mandatory and Optional Information for AutoPage Publication Excel Imports

A comprehensive list of mandatory and optional information for Publication Excel imports is listed in the **Importing Publications in Excel** section of the **STEP'n'design** documentation. The below table addresses the AutoPage-specific fields.

Column Header	Description	Mandatory?
RuleSettings	Pagination Rules used in the publication(s) and sections **Example**: <Action ID="PublicationTemplateSpreadIndexAction" Type="PublicationTemplateSpreadIndexAction" parametertemplateSpreadIndex="1"> <Condition ID="AlwaysCondition" /> </Action>	No
LinkedObjectKeyID	If using unique keys instead of STEP IDs to identify objects linked to the section, this column will contain the ID of the unique key associated with the object. For more information on unique keys, see the **Unique Keys** topic in the **System Setup** / **Super User Guide** documentation.	No
LinkedObjectID	STEP ID of the product, asset, or classification object linked into the section(s)	No (**Yes** if you have provided a LinkedObjectKeyID)
LinkedObjectType	Value will either be 'Product', 'Asset', or 'Classification' depending on whether a product, asset, or classification object is linked to the section(s). 'Product', 'Asset', and 'Classification' are generic terms and do not specify the exact object types of the product, asset, or classification.	No (**Yes** if you have provided a LinkedObjectID, as the possibility exists that a product object could share the same STEP ID as an asset or classification object)