Sitecore InCopy Connector 1.0

User Manual

Editing InDesign Documents with Sitecore CMS

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Chapter 1

Introduction

This document describes how to use the Sitecore InCopy connector that can be used to edit InDesign documents created with the Sitecore InDesign connector. It assumes that you have good knowledge of Sitecore and InCopy.

- **Chapter 1 - Introduction**
- **Chapter 2 - Starting Up**
- **Chapter 3 - Editing pages**
- **Chapter 4 - Menu Settings**
- **Chapter 5 - Using the Workbox**

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Chapter 2

Starting Up

This chapter briefly describes how you start the Sitecore InCopy connector plug-in in InCopy.

This chapter contains:

- Starting the Plug-in in InCopy.
- Buttons in Sitecore Panels.
- The Panel Menu.
- Project Structure.
- Log in to Sitecore.
- Logging off.

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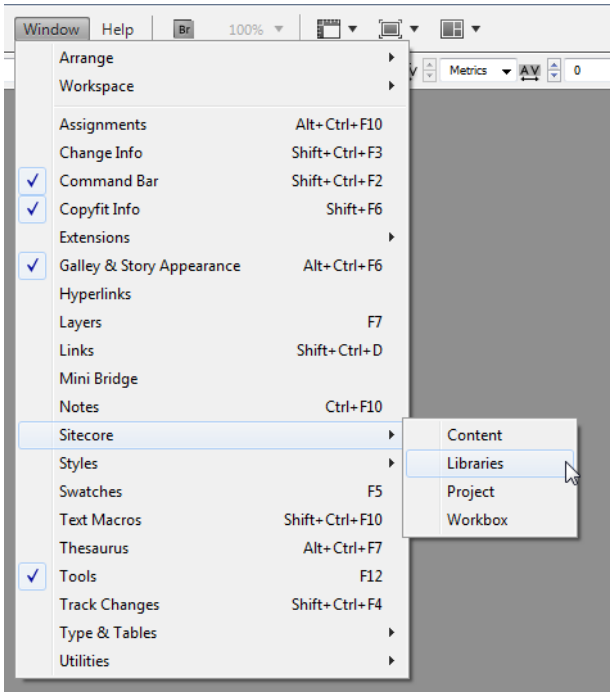
2.1 Starting the Plug-in in InCopy

1. Open InCopy.
2. Select the **Window** menu.
3. Select Sitecore.
4. Select the panel you wish to work with:



In total, there are seven panels, the **Project** panel, the **Content** panel, the **Libraries** panel and the **Workbox**.

The **Project** panel is used for working on the InDesign projects. The **Content** panel gives access to the contents repository. The **Libraries** panel gives access to all InDesign library items. The **Workbox** shows the workflow stages and items in the workflow.

2.2 Buttons in Sitecore Panels

This table displays an overview of the buttons in the different Sitecore InCopy Connector panels.

Button	Description	Panels			
		Project	Content	Libraries	Workbox
	Publish selected item	X			
	Save selected item	X			
	Add		X		

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Button	Description	Panels			
		Project	Content	Libraries	Workbox
	Delete selected item		X		
	Cut item		X		
	Copy item		X		
	Paste item		X		
	Find assigned item		X		
	Refresh	X	X	X	X
	Move selected item to first position		X		
	Move selected item one position up		X		
	Move selected item one position down		X		
	Move selected item to last position		X		
	Open item				X
	Check out	X			
	Check in	X			
	Accept item				X

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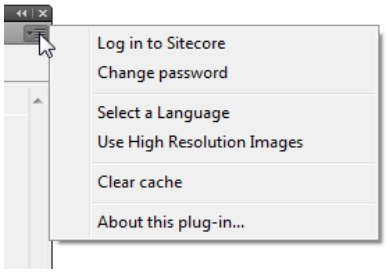
2.3 The Panel Menu

With the Panel menu you can choose different functions that are common to all panels.



.

Note
The panel menu is available and identical for all panels.

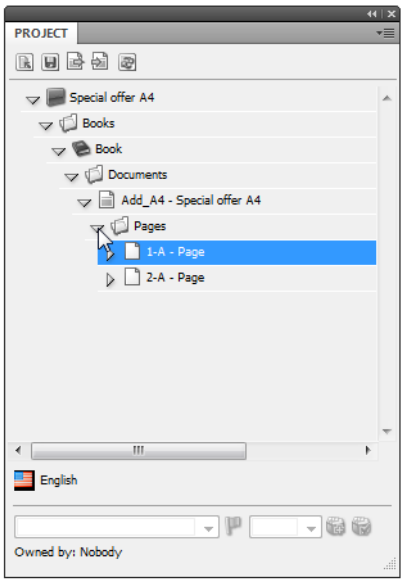
2.4 Project Structure

The project structure of each InDesign project contains several elements and folders.

A project consists of a number of elements with a structure corresponding to the InDesign model of a document.

- A *project* consists of an InDesign book (corresponds to the InDesign book (.indb)).
- A *book* can have one or more document items (correspond to InDesign documents (.indd)).
- A *document* can have one or more page items (correspond to InDesign pages).
- A *page* can have one or more snippets that hold page items, for example text frames, images, rectangles, and so on, which correspond to InDesign objects.

Open the project tree by clicking the nodes on each level.



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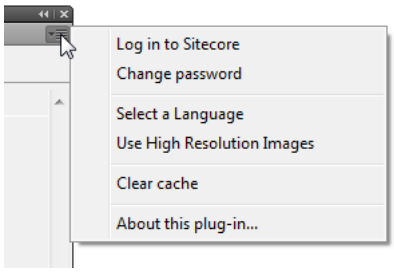
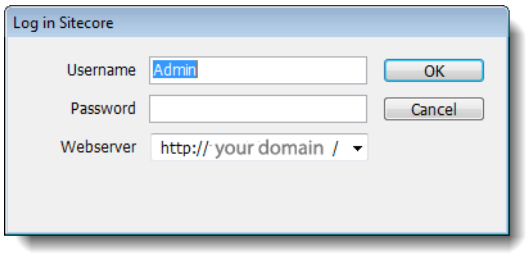
2.5 Log in to Sitecore

To log in, in the **Panel** menu click **Log in to Sitecore:**



The **Log in Sitecore** dialog box is displayed.

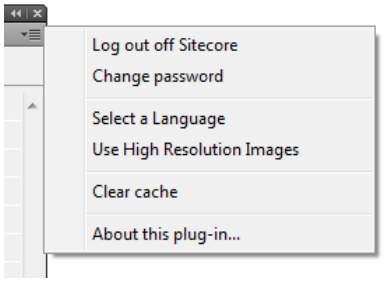


Enter a valid username and password using a Sitecore extranet domain user account. Select the url for the web server or select **New value** in the drop down list and then type the url. This will save the new url so that it will appear in the drop-down list the next time you start InDesign.

Note
The url's are saved in the ini file located in the same folder as the plugin (for example C:\Program Files (x86)\Adobe\Adobe InCopy CS5.5\Plug-Ins\Sitecore). When you are not able to save new urls, this might be caused by insufficient access rights to that specific folder.

2.6 Logging off

To log off, select **Log out off Sitecore** in the panel menu:



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Chapter 3

Editing pages

This chapter describes the steps involved in opening and editing an InDesign project with the InCopy connector.

This chapter covers:

- Opening Projects from the libraries panel.
- Opening Projects from the workbox.
- Editing pages.

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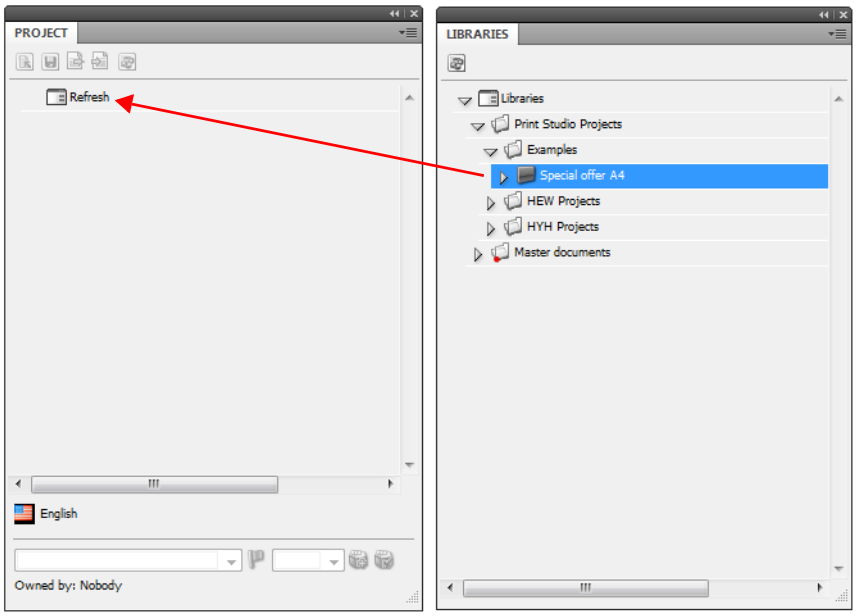
3.1 Opening Projects from the libraries panel

To start working on an InDesign project, an existing project needs to be opened in the project panel. A project can be opened from the Libraries panel, or it can be opened through the workbox when an item is passed in a workflow.

To open a project from the Libraries panel:

1. On the Libraries panel, open the **Print Studio Projects** folder.
2. Then locate the project you want to open and drag it to the root node in the **Project** panel.



The project is loaded in the project panel and you can start working with it.

3.2 Opening Projects from the workbox

When InDesign project items (for example a document or page) are passed through a workflow scenario to the InCopy user, the item will be displayed in the workbox. You can then open the project from the workbox. To open a project from the workbox:

1. On the Workbox panel, select the item you want to edit.

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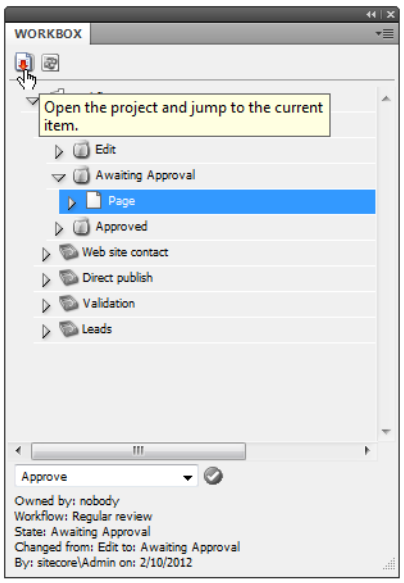
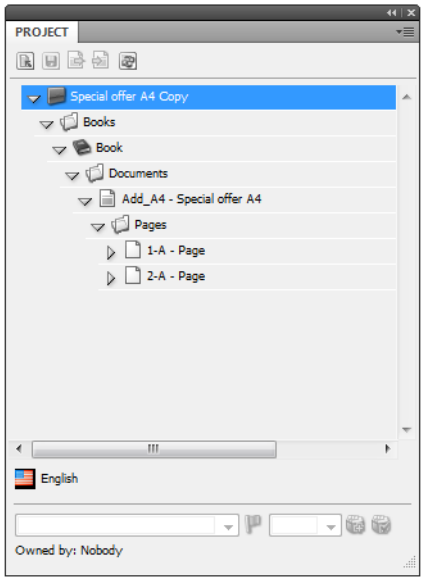
2. With the item selected, click the “Open project” button:



3. The project, which the item is part of, is now opened and loaded in the project panel:



4. You can now start editing the page items in the project.

3.3 Editing pages

Once the project is loaded, you can start editing pages. To start editing a page:

1. Select the page item you want to edit in the tree.

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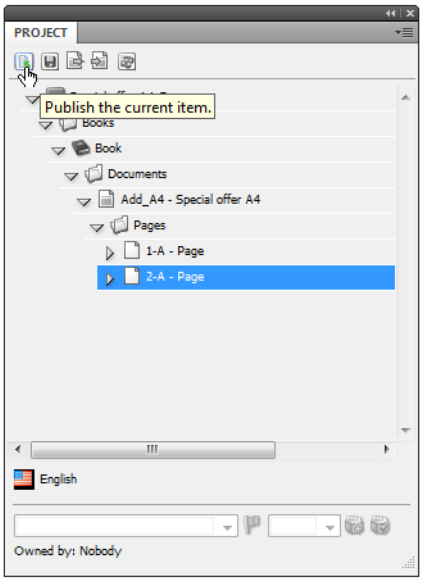
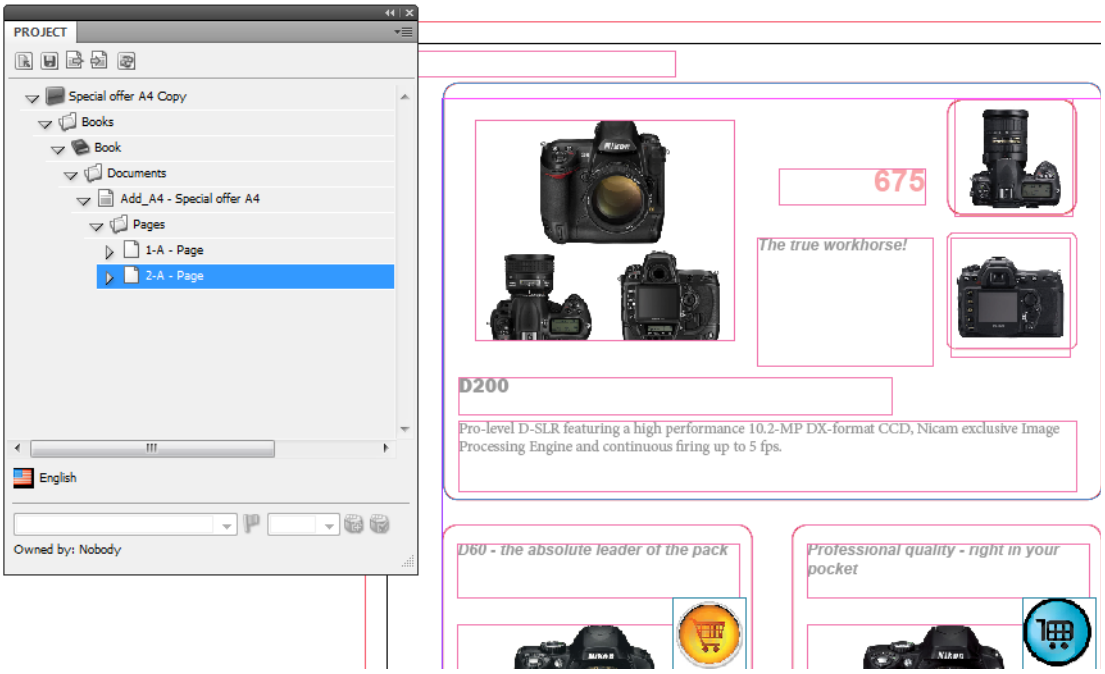
2. Click the **Publish** button to publish the page:



3. The page is published and displayed in InCopy. All page items are locked and can not be changed until you have checked out the page.



Note
You can double click a page item in the tree to jump to the corresponding page in InCopy.

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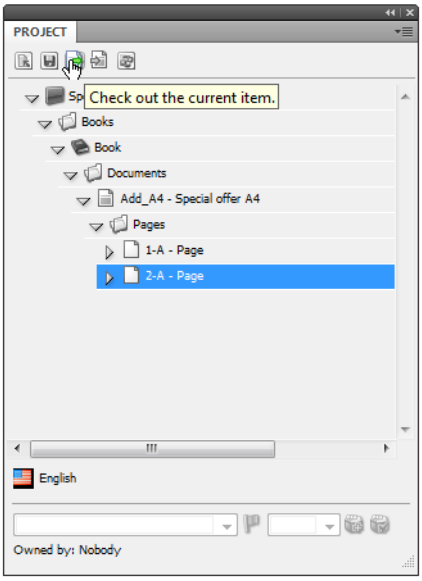
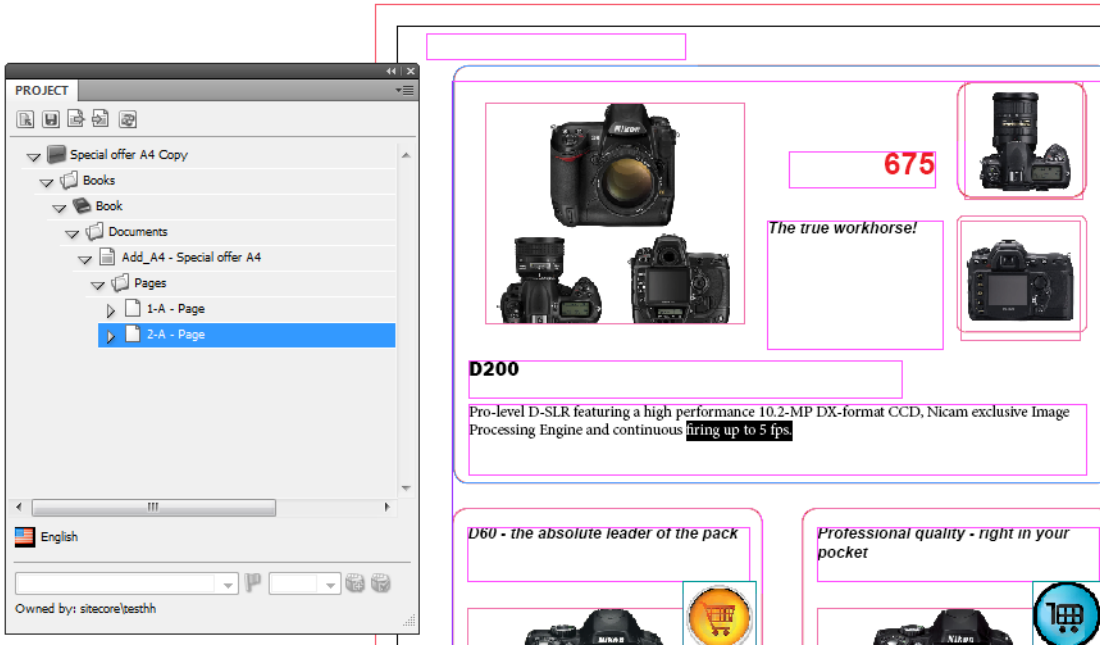
4. To check out the page item, click the **Check out** button:



All the page items and the related content items (assigned to the page snippets) are locked and can be changed only by the owner until they are checked in again.

5. The page is now unlocked and can be edited:



Note
You can only edit content in InCopy using the InCopy connector. You can't edit notes in InCopy and/or change images.

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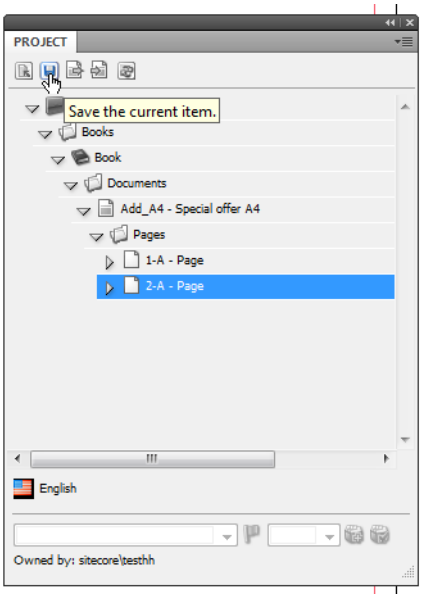
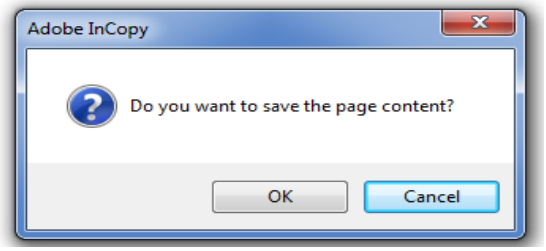
6. To save your changes select the page item in the tree and click the save button:



7. The save item dialog window is displayed:



8. Click **OK**. The changes are saved.

When ready with editing the page, as a last step the page needs to be checked in again. This unlocks the page and related content items. To check in the page:

1. Select the page item in the tree

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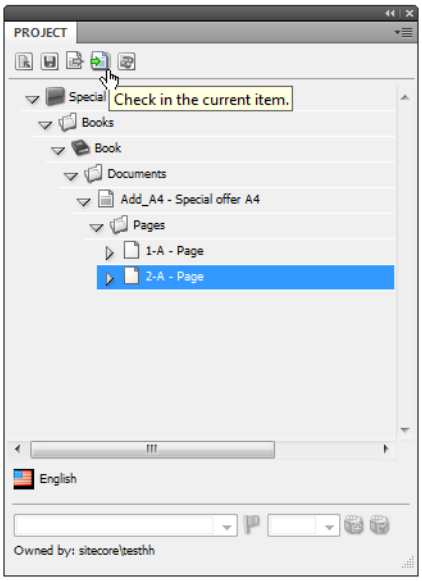
2. click the **Check in** button:



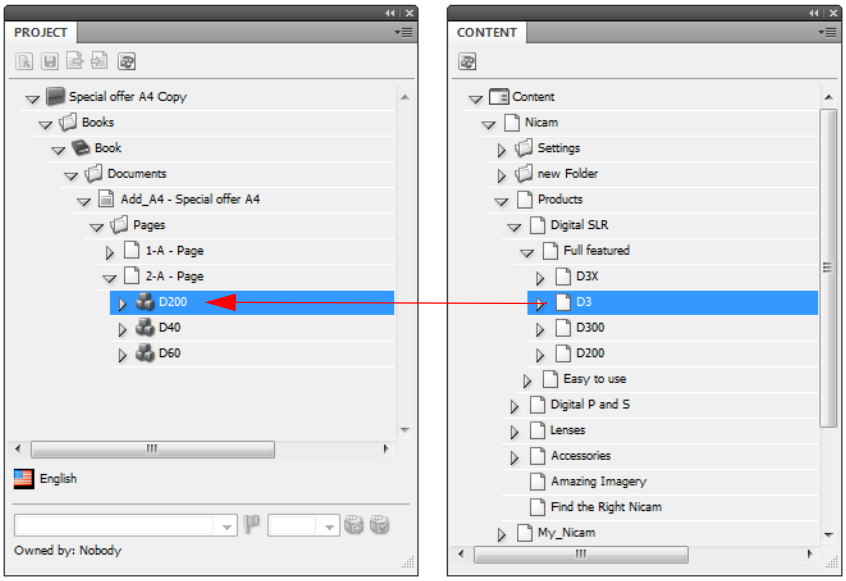
3. The page and all related items are checked in again.

3.4 Assigning content items

With the InCopy connector you can also assign content items to a snippet. This allows to assign a different content item to a snippet and work with that content instead.

To assign a content item to a snippet:

1. Select the content item in the **Content** panel.
2. Drag the content item to the project panel and drop it on the snippet item.



You can also drop it on the page item, then the content item is assigned to all snippet items on the page.

3. The content item is now assigned to the snippet.
4. Publish the page to show the results.

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Chapter 4

Menu Settings

This chapter describes how you control certain setting from the Panel Menu.

This chapter contains:

- Choosing Language.
- Using Low Resolution or High Resolution Images.
- Clearing the Cache.

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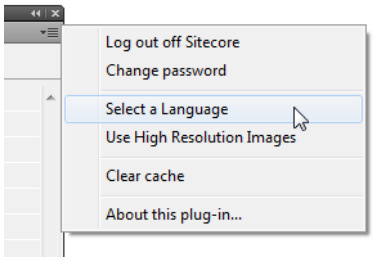
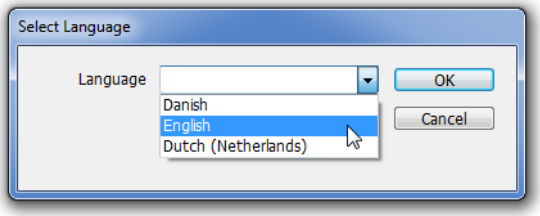
4.1 Choosing Language

1. To choose the language select the **Language** item from the panel menu:



   The **Select language** dialog box is displayed. The languages correspond with the languages in the Sitecore CMS:



2. Select the language of your choice and click **OK**.

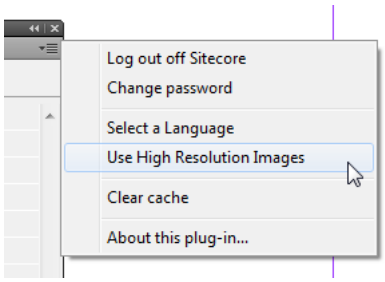
The selected language is loaded, meaning that when publish or create new items, the selected language is used. The selected language is indicated in the interface by a flag and the name of the language, placed at the bottom left of the project panel.

Note
If the fields, for example the width of a text frame are shared, the width is the same for each language. If the width field is set to non-shared, the width can be set for each language.

4.2 Using Low Resolution or High Resolution Images

When working online, you can only use low resolution images which are extracted from the Sitecore media library and then downloaded to InDesign. However, when working on a local area network (LAN) with access to high resolution images (stored on a file server) you can also use the high resolution images without the need to run a server based production setup. Consult your supplier on how to set up such a production environment.

To switch to high resolution images on the desktop, select **Use High Resolution Images** from the panel menu. To switch back to low resolution images, select **Use Low Resolution Images** from the panel menu.



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4.3 Clearing the Cache

To speed up the process of downloading information from the Sitecore server to the InDesign desktop client, data is cached. That is similar to caching with your web browser. To clear the cache, select **Clear cache** from the panel menu.

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Chapter 5

Using the Workbox

This chapter contains:

- Introduction.
- Opening Project Items From the Workbox.
- Using Content Items and Media Items from the Workbox.
- Moving Items to the Next Stage.

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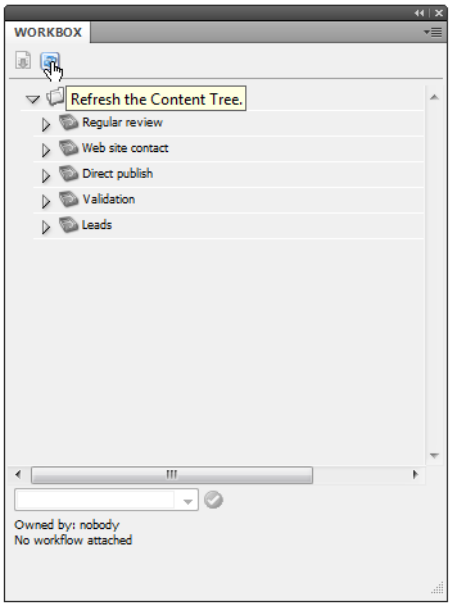
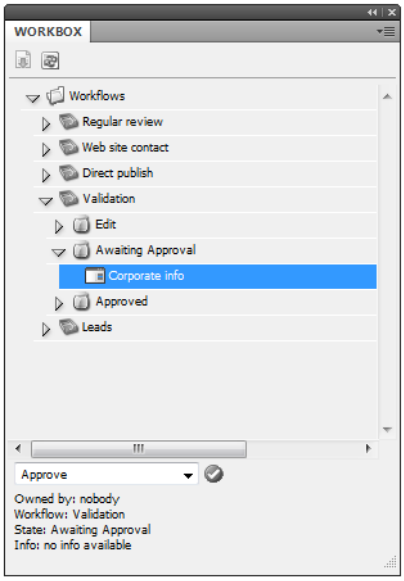
5.1 Introduction

Similar to the Sitecore workbox, the InDesign connector also offers a workbox. It shows the InDesign project items that are in a workflow stage and need the attention of the user.

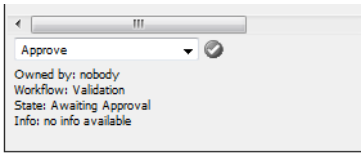
1. To load the workflow items, click the **Refresh** button in the workbox panel:



2. Select an item in a workflow stage:



The workflow info is displayed at the bottom of the panel



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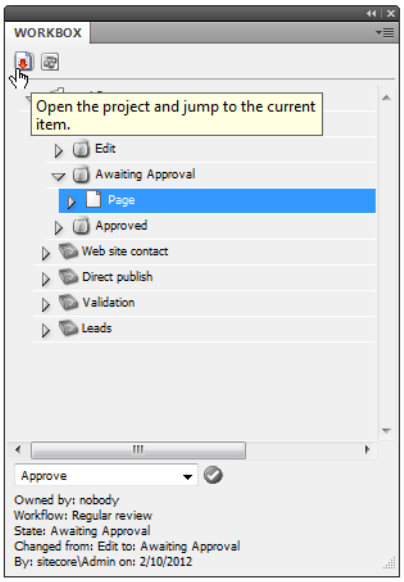
5.2 Opening Project Items From the Workbox

To work on an InDesign item in a workflow stage, just select that particular item and click the **Open project and jump to selected item** button. The project which the item is a part of is opened in the project panel and the item is selected in the tree.



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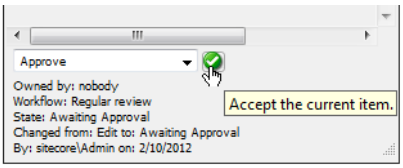
5.3 Using Content Items and Media Items from the Workbox

Content items that appear in the **Workbox** at some state can be used in drag and drop operations, in the same way as described earlier in this manual. That is also the case for media items. For example:

- You can drag and drop a content item to a snippet item to assign the content item to the snippet
- You can drag and drop a media item to an image frame item to assign the image to the image frame.

5.4 Moving Items to the Next Stage

To move an item to the next stage in the workflow, select the command from the drop-down list and then click the **Submit** button:



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