BrandMaker GmbH

Brand Template Builder Administration Manual

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BrandMaker GmbH

An der Raumfabrik

Amalienbadstraße 41a

76227 Karlsruhe, DEUTSCHLAND
+49 721 97791-000

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1 Introduction

The BrandMaker software solution is a web-based MRM (marketing resource management) system that you can use to flexibly design, simplify, and accelerate marketing processes. The modular solution encompasses the entire process chain, from planning and budgeting to media asset management, workflow and approval processes, reporting, and controlling. BrandMaker enables central access to all marketing-relevant information and ensures the implementation of a consistent corporate identity.

For more information about BrandMaker, see http://www.brandmaker.com.

Objectives and Structure of this Manual

This manual explains how to create a template from a file. The manual describes the template design process firstly for INDD templates and then for HTML templates.

You can learn about the individual processing steps for Template Design.

The manual answers important questions such as:

- How do I prepare the Brand Template Builder module?
- What do I have to take into account in order to use a file as template?
- How do I load an INDD file to the Media Pool?
- What steps must I carry out for Template Design?
- What options do I have to control the customizing of the template by users?

Additional Information

- About the Media Pool: Media Pool user guide
- About BrandMaker system administration: Administration manual
- About creating a document from a template: Brand Template Builder user guide

1.1 Start

With the module Brand Template Builder, you create CI-compliant templates that can be reused by as many other users as possible. The templates can usually be customized in parts, for example by changing text or exchanging images. You can create up to three types of templates:

- INDD templates: the initial format is an INDD file. This is used to create files that are mostly suitable for printing or sharing as PDFs. Examples are brochures, business cards or leaflets.
- Online templates: The source format is multiple ads from a campaign in HTML format, for example for banners or ads on social media. These are supplemented with JSON files that create the editability in the module as a template. Users can then create ads in the required size, for the required channel, etc. in the specified CI.
- HTML templates: This also uses an HTML file as the source format. This is used to create templates for emails in HTML format, static HTML pages or HTML content for ads.

Examples of changeable features and elements

- Size of the document, e.g. for variable ad sizes
- Text, e.g. the specification of fixed text alternatives or the free input of text
- Image, e.g. the specification of image alternatives or the free selection of images from the Media Pool
- Number of pages of the document, e.g. for selectable brochure content

The following sections explain the basic process of creating templates.

INDD Templates

In the first step, create the InDesign file in INDD format, with linked images where necessary. When doing so, you must take certain guidelines, which are described in *Creating a Template File* on page 113, into account.

The InDesign file is then created as an asset in the Media Pool, with the linked images where applicable. Use either the Media Pool import function or the InDesign Extension to import the file directly from InDesign to the Media Pool. or further information, please refer to the relevant manuals, see *Additional Documentation* on page 424.

You use the asset as the basis for creating the template in template design in the Brand Template Builder module. When doing so, you define the following issues:

- Which features and elements of the INDD file can be changed?
- How can the document creator change the features and elements?

When the document creator creates a document, he or she edits the features and elements that can be changed. In this case, each document receives the following properties:

- Name
- Locale assignment
- Validity within a specific time period
- If the function is activated and used: an affiliate assignment

InDesign does not need to be installed locally to customize the file. Document creators edit the created documents in the Brand Template Builder customizing wizard.

Online Templates

Online templates combine multiple, similar target formats in HTML format in different sizes and for different channels. Using JSON files, you as the designer specify the editability. For this, see *Files for online templates* on page 124.

All ads and the JSON files are stored in a directory and this directory is zipped as an archive and uploaded to the module. The template is then directly available for document creators. Document creators can create a variety of output formats for online advertising with just a few inputs, e.g. for banner ads or for social media such as Facebook, Instagram, LinkedIn and Twitter. This eliminates the need for time-consuming editing in template design.

Note

To create online templates, you need JSON knowledge.

HTML Templates

When you create HTML templates, the HTML files are not saved as assets in the Media Pool; instead, they are loaded directly to the Brand Template Builder module in a ZIP file. The further procedure is largely the same: the template designer specifies how the document creator can edit the document in the template. The document creator edits the modifiable features and elements using the options provided.

1.2 Basic Steps

If you use the Brand Template Builder module as an administrator or template designer, your work is broken down into the following basic steps:

1. Brand Template Builder administration: in the module administration, you set basic specifications regarding the content, sources, and production of documents and the creation process. See *Basic Steps* above.
2. Creating a template file: before you create a template, you must first create one or several templates file. See the instructions in *Creating a Template File* on page 113.
3. Creating a template: in the next step, you create a template. See *Creating an INDD Template* on page 157 and *Create Online Template* on page 303 and *Creating an HTML Template* on page 305.
4. *Managing a Template* on page 363
5. Using a template in other systems or other modules: See *Using the Template in Other Modules* on page 376.

1.3 Prerequisites

The template creator requires access to the Brand Template Builder module and the appropriate user rights for creating templates. To adapt the module, the user requires access to the administration and the rights for module-specific configuration.

INDD Templates

When creating an INDD template, the following prerequisites apply:

- InDesign file in INDD format that meets the prerequisites in *INDD File* on page 115. To create these files, note that you need a knowledge of InDesign that is not provided in this manual.
- Access to the Media Pool module and knowledge of how to operate it. Alternatively, the BrandMaker InDesign Extension can also be used to load INDD files directly from InDesign to the Media Pool.

Online Templates

To create online templates, the following prerequisites apply:

- HTML source directories,which represent the content of the ads.
- A set of JSON files that correspond to the structures described in the subsections of *Files for online templates* on page 124.
- JSON Knowledge: This manual does not provide an introduction to JSON. Please note that JSON knowledge is mandatory for creating online templates.

HTML Templates

When creating an HTML template, the following prerequisites apply:

- HTML file that meets the prerequisites in *HTML File* on page 152.
- Previous knowledge of HTML: This manual does not provide an introduction to HTML. Please note that you must have knowledge of HTML to create HTML templates.

1.4 Style Conventions

Notes appear in a blue framed box.

Warnings appear in a red framed text box.

Paths to follow are written like this: choose > *and then* >.

This page has been intentionally left blank to ensure new chapters start on right (odd number) pages.

2 Administration

When you administer Brand Template Builder, you have tasks in the following areas:

- Simplifying customizing: Brand Template Builder customizing provides a variety of functions for creating documents. To help guide your document creators and simplify the process of creating these documents, you can control the functions displayed and support the document creator with text control functions. That also includes defining workflows, for example. For more information, see *Simplifying Customizing* on page 48.
- Supplying content consistently and from a central source: specify the sources in which content can be managed centrally and consistently. One example is address data. The document creator accesses the sources and can effortlessly use the data in the documents. For more information, see *Supplying Content Centrally* on page 62.
- Displaying texts and tables in an effective and compliant way: texts and tables displayed in documents should be CI compliant. To do so, you must synchronize the BrandMaker system with your formats in the INDD files. See *Displaying Texts and Tables* on page 78.
- Supplying useful properties for templates and documents: access templates and documents during the meta data creation process. Supply metadata that describes the templates and documents well and therefore makes them easier to find and use. See *Supplying Useful Properties* on the facing page.
- Shaping print and PDF production: make important decisions about the production of documents, such as the output methods available to the user and the print agencies that can be selected. See *Shaping Production* on page 83.
- Assigning authorizations for users: assign the necessary rights to the user roles in the system. See *Assigning Authorizations* on page 93.
- Connecting external functions via API: if you are using the API interface, you can configure your required settings in the system settings. See *Connecting External Functions via API* on page 112.

2.1 Supplying Useful Properties

Provide templates and documents with metadata during the creation process. Supply metadata that describes the templates and documents well and therefore makes them easier to find and use. This applies to the following metadata:

- *Descriptive properties*: the *Template type* and *Color* properties are available to create the templates in step 1. In the administration, choose which values the template designer can select. See *Descriptive Properties* below.
- *Standard Formats*: the sizes that fit the document are displayed in a drop-down list in step 2 of the customizing wizard. As the administrator, you choose the available sizes. See *Standard Formats* on the next page.
- *Online containers*: Online containers let you define how online templates are displayed for specific channels. This enables the document creator to check how a document will be displayed in a channel, for example, on LinkedIn or Twitter. Note *Online Container* on page 30.
- *Locale*: each document is assigned to a locale. You can use the locale to describe the territories that are relevant to you using a small amount of data. For more information, see *Locales* on page 34.
- *Custom properties*: The standard properties may not be sufficient to characterize your templates. As administrator, you therefore create suitable properties and their values under *> Administration > Brand Template Builder > Custom Properties*. Designers assign the values to the templates in step 1 of the template design. Further information is available at *Custom Properties* on page 38.

2.1.1 Descriptive Properties

The template type and color properties are provided to create templates in step 1. In the administration, choose which values the template designer can select. You maintain the values in the the following custom structures under *> Administration > Data Structures & Workflows > Custom Objects & Structures* without assistance from BrandMaker.

- *Document type*: W2P_DOCUMENT_TYPE: this describes the type or purpose of the document (for example, *Advert*, *Job advert*, *Business card*).
- *Color*: W2P_TEMPLATE_COLOR: this describes the color of the document (for example, *RGB* or *6-color (CMYK und 2 spot colors)*).

The fields have only a descriptive function.

> **Note**
>
> Note that you must comply with the following convention for these custom structures: a number that is unique within the custom structure must be entered in the *Name* field for each custom structure.

2.1.2 Standard Formats

Standard formats help to create documents based on a resizable template or a template group with multiple sizes. You as administrator manage the available formats under *> Administration > Brand Template Builder > Standard formats*:

You manage the standard formats in groups. The *Various formats* group is predefined and contains the formats that were created in the previously used modifiable structure and migrated during the update.

Effects of the standard formats In the output process

The default formats play a role when creating a document based on a resizable template or a template group with multiple sizes, but depending on the type of output file:

- INDD templates: the formats into which the document fits are displayed in a drop-down list in step 2 of the Customizing Wizard for easy selection and prepopulation. The document creator can independently choose the size within the format limits set by the designer.
- HTML templates: Standard formats do not matter for HTML templates.
- Online templates: In online templates, you specify the sizes in which documents can be output. In addition, standard formats allow you to assign documents to online containers and thus to display them as closely as possible to the target format, for example on social media. For more information, see the chapter *Files for online templates* on page 124.

Properties

Format groups

Property	Description	Mandatory
Display name	Name of the format group used for display in the system. You can enter the property in several languages.	Yes
Unique name	Technical name for addressing the property, e.g. via API. The technical name must be unique among the created format groups and may consist of the following characters: A-Z, a-z, 0-9 and the hyphens - and _.	Yes
Description	Inform other users in the system by describing the group. You can enter the property in several languages.	No
Channel	Specify for which channel the default formats are created: • Print • Banner ads • Social Media • E-Mails • Landing Pages	Yes
Unit type	Specify whether the size of the document is specified in a length unit (mm/cm/in) or a raster unit (px). The property cannot be changed after initial creation.	Yes
Visibility	Each format group can be restricted in its visibility for users. The effect is that when creating a document, only the formats visible to the creating user are selectable. • Affiliate, if the function Affiliates is activated in your system. • User labels • Organizational units • Users from specific countries All criteria are OR-linked, i.e. only one criterion must apply to the user for the group to be visible to the user.	No

Standard formats

Property	Description	Mandatory
Display name	Name of the standard format used for display in the system. You can enter the property in several languages.	Yes
Unique name	Technical name for addressing the property, e.g. via API. The technical name must be unique among the created format groups and may consist of the following characters: A-Z, a-z, 0-9 and the hyphens - and _.	Yes
Description	Inform other users in the system by describing the format. You can enter the property in several languages.	No
Width and Height	Enter the width and height of the format. If you create a format in a group for which the unit type *Raster* is created, enter the values in pixels. For a group with the unit type *Length*, enter the values in coordination with the *Unit* property.	No
Unit	Specify whether the size of the document is specified in a length unit (mm/cm/in) or a raster unit (px).	No

Export and Import

You have the possibility to export all groups and their formats into an JSON file, to re-sort in the file for example and to re-import the edited file. The file contains the following data:

- Format group name
- Format name
- Description of the format
- Width of the format
- Height of the format
- Unit of size specification

You must maintain visibility restrictions of the group via the interface.

You can edit the data in the file, save the file and then upload it again. Note that an import must always contain all required formats: Formats that are created in the system but are not in an import file are deleted.

Migrations

Note for migrations from version 6.8 and older to 6.9 and younger:

- The new filter criteria *Format group* and *Channel* are not activated. Activate the criteria and test the search if necessary.
- All existing format groups get the channel *Print*.
- The technical name is generated from the first display name entered. First, all characters except A-Z, a-z, 0-9 and the hyphens - and _ are removed. If the name generated in this way already exists, a suitable number is appended in brackets, e.g. (2). The search for duplicates is not case-sensitive, i.e. format_AA is interpreted as a duplicate of format_aa and converted to format_AA(1).

Associated Tasks

- *Creating a Format Group* below
- *Editing a Format Group* below
- *Deleting a Format Group* on the next page
- *Adding a Format* on the next page
- *Editing a Format* on page 29
- *Deleting a Format* on page 29
- *Exporting Formats* on page 29
- *Importing Formats* on page 29

2.1.2.1 Creating a Format Group

1. Click > *Administration* > *Brand Template Builder* > *Standard Formats*.
2. Click *Add Group*.

   The dialog *Add Group* is opened.
3. Edit the mandatory properties of the group.
4. Optional: Edit the remaining properties.
5. Click *Save*.

You have created a format group.

2.1.2.2 Editing a Format Group

When editing a format group, you can change the name and visibility settings.

1. Click > *Administration > Brand Template Builder > Standard Formats*.
2. Click the down arrow at the end of the line for the format group you want to edit.

   The formats of the group are displayed.
3. Click *Edit Group*.

   The dialog *Format Group* is displayed.
4. Optional: Edit the mandatory properties of the group.
5. Optional: Edit the remaining properties.
6. Click *Save*.

You have edited the format group.

2.1.2.3 Deleting a Format Group

1. Click > *Administration > Brand Template Builder > Standard Formats*.
2. Click the down arrow at the end of the line for the format group you want to delete.

   The formats of the group are displayed.
3. Click *Delete Group*.

   A confirmation prompt is displayed.
4. Click *Confirm*.

The group is deleted.

2.1.2.4 Adding a Format

1. Click > *Administration > Brand Template Builder > Standard Formats*.
2. Click the down arrow at the end of the line of the format group to which you want to add the format.

   The formats of the group are displayed.
3. Click *Add Format*.

   The *Format* dialog is displayed.
4. Edit the mandatory properties of the format.
5. Optional: Edit the remaining properties.
6. Click *Save*.

You have added the format.

2.1.2.5 Editing a Format

1. Click > *Administration* > *Brand Template Builder* > *Standard Formats*.
2. Click the down arrow at the end of the line of the format group in which you want to edit the format.

   The formats of the group are displayed.
3. Click the pencil icon for the format you want to edit.

   The *Format* dialog is displayed.
4. Optional: Edit the mandatory properties of the format.
5. Optional: Edit the remaining properties.
6. Click *Save*.

You have edited the format.

2.1.2.6 Deleting a Format

1. Click > *Administration* > *Brand Template Builder* > *Standard Formats*.
2. Click the down arrow at the end of the line of the format group in which you want to delete the format.

   The formats of the group are displayed.
3. Click the trash can icon for the format you want to delete.

   A confirmation prompt is displayed.
4. Click *Confirm*.

You have deleted the format.

2.1.2.7 Exporting Formats

1. Click > *Administration* > *Brand Template Builder* > *Standard Formats*.
2. Click *Export*.

   All data on the *Standard Formats* page is exported to an Excel file. A dialog of the operating system of your computer is opened.
3. Follow the instructions of the operating system.

You have exported the standard format data.

2.1.2.8 Importing Formats

1. Click > *Administration* > *Brand Template Builder* > *Standard Formats*.
2. Click *Import*.

The dialog *Import upload* is displayed.

3. Drag and drop the Excel file to the upload area of the dialog or click to select a file. Follow the instructions of the operating system.
4. Click *Upoad*.

The file is uploaded and the formats are updated according to the specifications in the file.

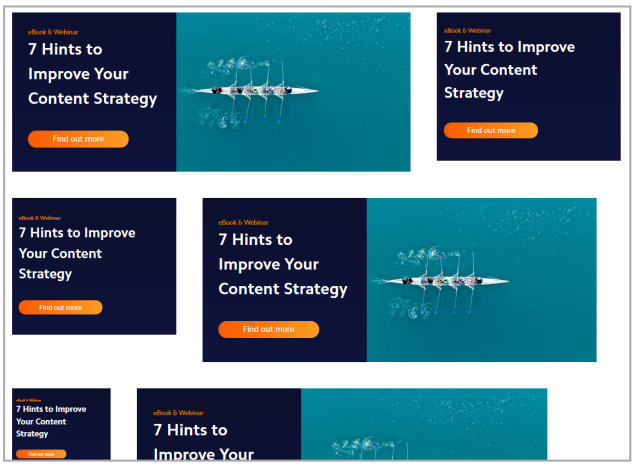
2.1.3 Online Container

Online containers let you specify how online templates are displayed for specific channels. This allows the document creator to check how a document will be displayed in a channel, for example on LinkedIn or Twitter.

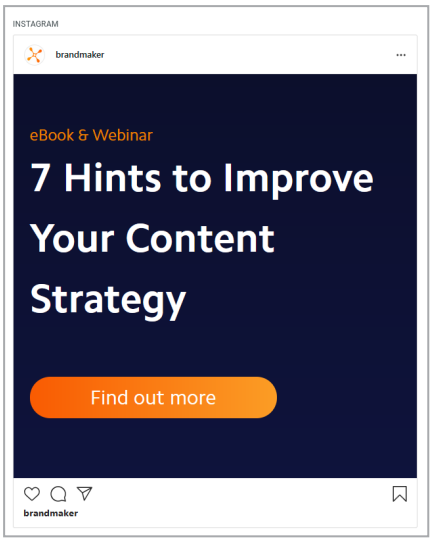
Example

The following images show the same message in different sizes and for different channels:

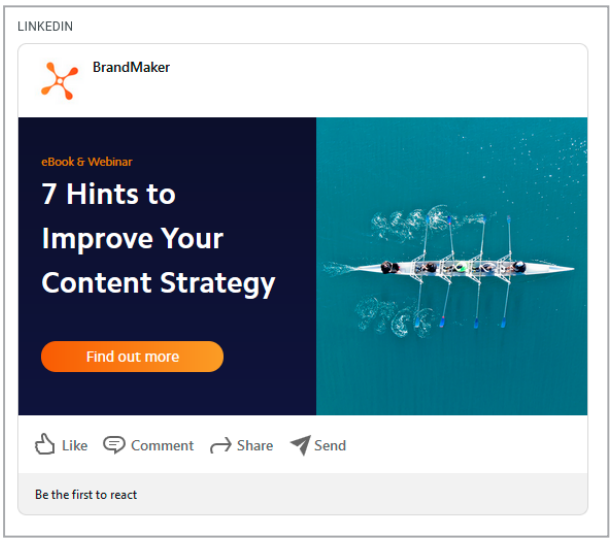
- Banner ads:



- Instagram:

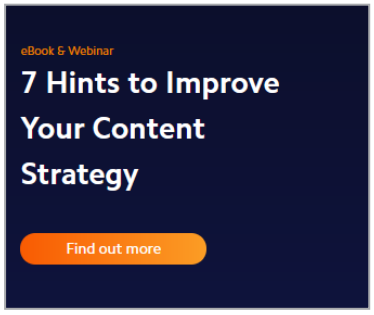


- LinkedIn:



- Twitter:

The areas



or

show the central message. This is created by an online template that can contain several variations of the central message.

Through the container, the additional information is provided as in the Instagram, LinkedIn and Twitter examples. Consequently, the container serves as an illustration for the document creators.

You as an administrator manage online containers under *> Administration > Brand Templates > Online Containers*. On this page you will find a set of online containers that you can use by default as well as download and customize for your needs.

Technical context of containers and online templates

Both containers and online templates consist of one or more source directories and a set of JSON files. The source directories contain the HTML code needed for rendering.

You use the JSON files to configure how files in the source directories are related and whether it is a container or an online template. The following table compares the JSON files that must be created for an online template and a container, and indicates where you can find a description of the JSON structure:

JSON file	Container	Online Template	Description
container.json	Yes	—	*container.json* on page 127
template.json	—	Yes	*template.json* on page 128
variables.json	—	Yes	*variables.json* on page 131
sources.json	Yes	Yes	*sources.json* on page 133
contents.json	Yes	Yes	*contents.json* on page 138
rendering.json	—	Yes	*rendering.json* on page 141
selectors.json	Yes	Yes	*selectors.json* on page 145
rules.json	Yes	Yes	*rules.json* on page 148

Note that for clarity, the structure of all JSON files is described in chapter Online templates and the subchapters.

Related actions

- *Download container* below
- *Import Container* below
- *Download Source Files* below
- *Update Source Files* on the next page
- *Delete Container* on the next page

2.1.3.1 Download container

1. Click > *Administration* > *Brand Templates* > *Online Container*.
2. Click > ⋮ > *Download Container* in the row of the container you want to download.

The container is downloaded as a ZIP file.

2.1.3.2 Import Container

Prerequisite: You have collected the required files in a ZIP file.

1. Click > *Administration* > *Brand Templates* > *Online Container*.
2. Click > *Import* above the table.

   The *Upload* dialog is displayed.
3. Add the ZIP file to the import area using drag-and-drop. Alternatively, click in the import area. A dialog of your operating system opens where you can search and select the ZIP file.
4. Click *Save*.

The file will be imported.

During import, the files are checked. If import is not possible due to an error in the JSON files, the system informs you about the error. Correct the error and import the corrected files again.

2.1.3.3 Download Source Files

1. Click > *Administration* > *Brand Templates* > *Online Container*.
2. Click > ⋮ > *Download Source Files* in the row of the container whose source files you want to download.

The source files of the container are downloaded as a ZIP file.

2.1.3.4 Update Source Files

Prerequisite: You have placed the required files in a "source" directory and combined the directory into a ZIP file.

1. Click > *Administration* > *Brand Templates* > *Online Container*.
2. Click > ⋮ > *Update Source Files* in the row of the container whose source files you want to update.

   The *Update Source Files* dialog is displayed.
3. Add the ZIP file to the import area using drag-and-drop. Alternatively, click in the import area. A dialog of your operating system opens where you can search and select the ZIP file.
4. Click *Save*.

The file is imported.

During import, the files are checked. If import is not possible due to an error in the JSON files, the system informs you about the error. Correct the error and import the corrected files again.

2.1.3.5 Delete Container

> Attention! Data loss!
>
> Deleting an online container cannot be undone.

1. Click > *Administration* > *Brand Templates* > *Online Container*.
2. Delete > ⋮ > *Delete* in the row of the container you want to delete.
3. A confirmation prompt is displayed.
4. Click *Confirm*.

The online container is deleted.

2.1.4 Locales

Each document is assigned to a locale. You can use the locale to describe the territories that are relevant to you using a small amount of data. You maintain the locale in the custom structure L10N_Locale.

Parameters

You use the following values to describe a locale:

- *Name*: the unique ID of the locale.

  > Attention!
  >
  > Entering other characters as digits leads to errors! Use consecutive numbering that continues the numbering from the last created territory.

- *Name displayed*: include the names that you want to use in the various languages for the locale. Use the following structure:
  ~{language code}Name.
  Enter multiple names one after the other. Note that you only have to enter the translations for the interface languages of your BrandMaker system.
  - *Language code*: language code according to ISO 639-1 in uppercase (for example, EN for English, DE for German).
  - *Name*: name of the locale that is displayed in the selection list in the data sheet of the localized data object.
  - Example: the *Spain* entry in the languages English, German, and French: ~{EN}Spain~{DE}Spanien~{FR}Espagne
- Attributes:

Name	Function	Edit
uniqueName	Unique name, which must be unique within the locale	Mandatory field
scriptCode	The character set used for print characters (for example, Cyrillic or Simplified Chinese)	
numbers	The character set used for numbers	-
languageCode	Language code according to ISO 639-1 in lowercase	Mandatory field
image	Load an image to represent the territory visually. If the field is empty, the flag for the selected country code is displayed if it is stored by default.	Optional

Name	Function	Edit
default	The default locale setting • true = the locale is the default locale. • false = the locale is not the standard locale. Attention! Only one locale must be flagged as the default locale at all times.	-
currency	Currency entry for the locale	-
countryCode	Enter the country code of the territory	Mandatory field
collationParameter, collation	Parameter for setting the character sorting in the relevant language	-
calendar	Calendar form, such as the Gregorian calendar	-

Associated Tasks

- *Configuring or Changing the Locale* below
- *Deleting a Locale* on the facing page

2.1.4.1 Configuring or Changing the Locale

1. Choose > *Administration > Data Structures & Workflows > Custom Objects & Structures > Custom Objects.*
2. In the *Select custom structure* picklist, select the structure *L10N_Locale (L10N_Local)*.
3. Choose *Select*.
4. Choose:
    1. *To create a new locale*:
        1. In the *Create new custom object* field, enter the name of the new locale.
        2. Click *Create*.
    2. *To change an existing locale*:
        1. In the *Select available custom object* selection list, select an existing locale.

5. Mandatory: you always edit the following fields:
    - Name

      Warning!

      Use consecutive numbering that continues the numbering from the last created territory.

    - *Name* displayed
    - Attribute *uniqueName*
    - Attribute *language code*
    - Attribute *country code*
6. Optional: edit the following fields:
    - Attribute *default* for the locale that is the default locale.
    - Attribute *image*
7. Choose *Save* at the end of the attribute list.

You have configured the locale. Repeat the process if additional locales are required.

2.1.4.2 Deleting a Locale

Warning! Data loss!

Do not delete any locales that are being used in Brand Template Builder.

1. Choose > *Administration* > *Data Structures & Workflows* > *Custom Objects & Structures* > *Custom Objects.*
2. In the *Select custom structure* selection list, select the structure *L10N_Locale (L10N_Locale)*.
3. Choose *Select*.
4. In the *Select available custom object* selection list, select an existing locale.
5. Click the *Delete* button below the attributes.

You have deleted the locale.

2.1.5 Custom Properties

The standard properties may not be sufficient to characterize your templates. As administrator, you therefore create suitable properties and their values under > *Administration > Brand Template Builder > Custom Properties*. Designers assign the values to the templates in step 1 of the template design.

You can create any number of custom properties. The properties are also displayed under > Brand Template Builder > Manager and > Brand Template Builder > Designer in the template properties.

You also have the option of including custom properties in the search. In addition, you can use a custom property to group templates under it to make faster and easier for the document creator to find them. Templates with the same value in the grouping property appear as one tile in the search results.
You edit the search configuration and the grouping property under *> Administration > Brand Template Builder > Search Configuration*. For more information, see *Configuring and Managing Search* on page 45.

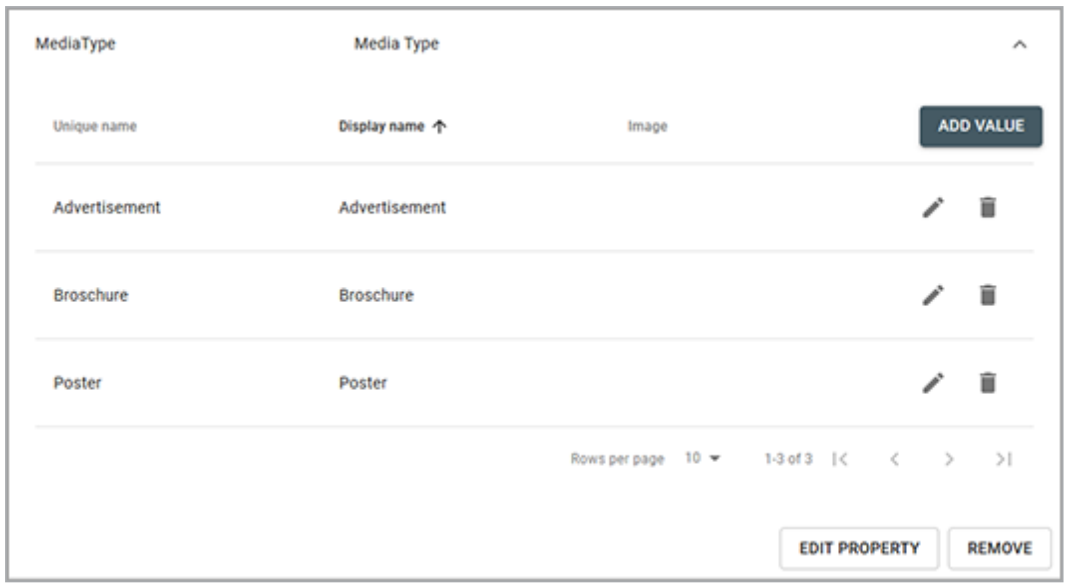
Note

The custom properties replace the previous *Meta Templates* feature. Therefore, when you implement the first Brand Template Builder version with custom properties, previous meta templates may be transferred to the *Meta Template* custom property.

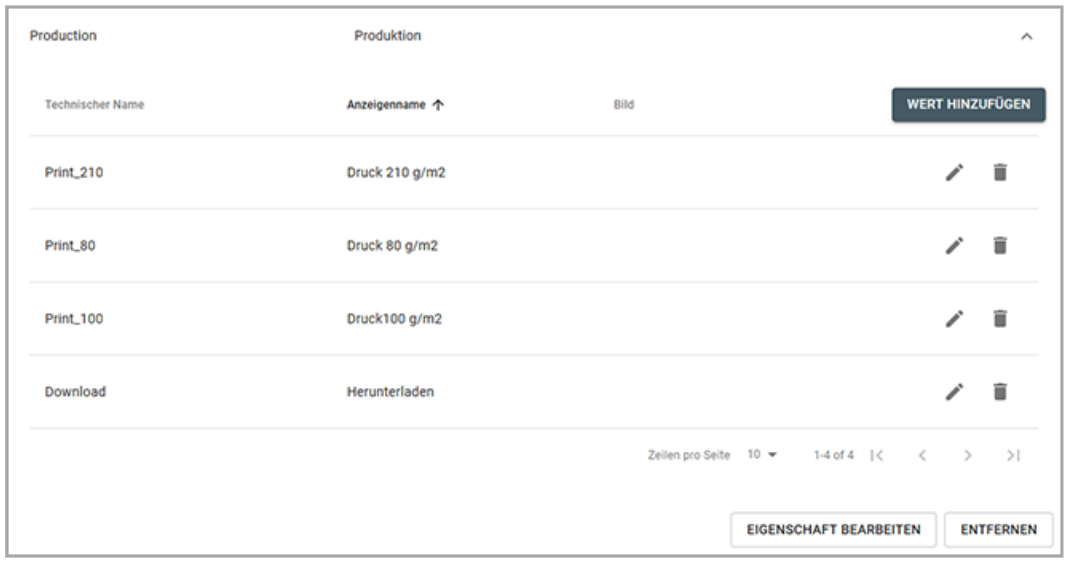
Example

You structure your advertising media according to the following characteristics:

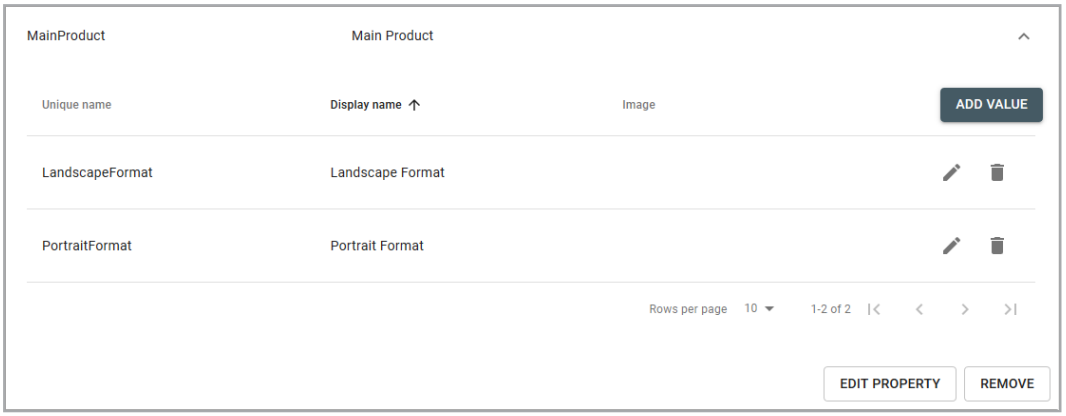
- *Media type*: You create templates for various media types, such as advertisements, brochures, and posters. You create the following values under > Administration > Brand Template Builder> Custom Properties:



- *Production*: You differentiate whether the finished document is downloaded or printed. When printing, the designer can choose between different paper weights, e.g. 80 g/m2, 100 g/m2 or 210 g/m2:



- *Presentation of the product*: You distinguished whether the main product advertised is presented in landscape or portrait format:



You also specify under *> Administration > Brand Template Builder > Search configuration* that the characteristic *Media type* is the grouping property.

Result

The designer creates the template and fills in the custom properties. For example, the designer creates several brochures.

If the document creator now searches for the media type *brochure*, a tile is displayed. This tile groups together all valid templates for which the *Media Type* property matches the *Brochure* value. Other properties can be different, for example, brochures can be created for printing on paper with different weights or for downloading.

> **Note**
>
> Several values of a user-defined property can be assigned to a template. For example, a brochure can be assigned both the Production values *Download* and printing on paper of different weights.

Restriction in the assignment of the technical name

Note that the technical names of properties and their values may only consist of the following characters: A-Z, a-z, 0-9 and the separators - and _.

Export and Import

To quickly create data, you can export the created custom properties and their values into an Excel file, add data and re-import it.

Note

You cannot delete a property or value using the export-import function. You can only create new properties and values.

The Excel file contains two data sheets. The first data sheet *Custom properties* lists the properties with their data:

- *Name*: Since the name can be specified language-dependent, one column is created per language, e.g. *Property name (de)* or *Property name (en)*. If a name is not assigned to a language, a language-neutral column is created: *Property name*.
- *Unique Name*: The unique name is entered in the *Property unique name* column.
- *Description of property*: Since the description can be entered language-dependent, one column is created for each language, e.g. *Description (de)* or *Description (en)*. If a description is not assigned to a language, a language-neutral column is created.

The values of the properties are entered in the data sheet *Custom property values*:

- *Linkage to a property*: The name of the property to which the value belongs is entered in the *Property unique name* column.
- *Unique name of the value*: The unique name is entered in the column *Value unique name*.
- *Name of the value*: Since the name can be specified language-dependent, one column is created for each language, e.g. *Value name (de)* or *Value name (en)*. If a name is not assigned to a language, a language-neutral column is created: *Value name*.

To add a property or value, you must specify all data.

For the procedure, please refer to chapter *Exporting and Importing Custom Properties* on page 44.

Associated Tasks

- *Creating a Custom Property and its Values* on the next page
- *Editing a Custom Property or its Values* on the next page
- *Deleting a Custom Property or its Values* on page 43
- *Exporting and Importing Custom Properties* on page 44

2.1.5.1 Creating a Custom Property and its Values

1. Click > *Administration > Brand Template Builder > Custom Properties*.
2. Click *Add Property*.

   The dialog *Add custom property* is displayed.
3. Enter a unique name. Permitted characters are: A-Z, a-z, 0-9 and the separators - and _.
4. Enter a display name. Click the globe icon to enter the display name in different languages.
5. Optional: Enter a short and concise description to help designers assign the property.
6. Click *Save*.

   The custom property is created and displayed in the list.
7. Click the down arrow at the property at the end of the line.

   The list of values is displayed. The list is empty for a newly created property.
8. Click *Add Value*.

   The dialog *Add custom property value* is displayed.
9. Enter a unique name.
10. Enter a display name. Click the globe icon to enter the display name in different languages.
11. Optional: If you want to represent the value visually, either select an image from the module *Media Pool* or upload an image.
12. Click *Save*.

    The value is created.
13. Repeat steps 8 to 12 until you have created all required values.

You have created a custom property and its values.

2.1.5.2 Editing a Custom Property or its Values

1. Click > *Administration > Brand Template Builder > Custom Properties*.
2. Click the down arrow at the end of the line for the property you want to edit.
3. Edit the property:
   a. Click *Edit Property*.

      The dialog *Edit custom property* is displayed.

b. Edit the unique name, the display name or the description.

c. Click *Save*.

Your changes are saved.

4. Click the down arrow at the property at the end of the line.

The list of values is displayed.

5. Edit a value:

a. Click the pencil icon at the end of the line for the value you want to edit.

The dialog *Edit custom property value* is displayed.

b. Edit the unique name, the display name or change the image.

c. Click *Save*.

Your changes are saved.

6. Repeat step 5 until you have made all changes.

You have edited a custom property or its values.

2.1.5.3 Deleting a Custom Property or its Values

Attention! Data loss!

Deleting a custom property or value cannot be undone.

Deleting a value

1. Click > *Administration* > *Brand Template Builder* > *Custom Properties*.
2. Click the down arrow at the end of the line for the property whose value you want to delete.

The list of values is displayed.

3. Click the trash can icon at the end of the line for the value you want to delete.

A security prompt is displayed.

4. Click *Confirm*.

You have deleted a value of a custom property.

Deleting a property

1. Click *> Administration ;> Brand Template Builder > Custom Properties*.
2. Click the down arrow at the end of the line for the property you want to delete.

   The list of values is displayed.
3. Click *Remove*.

   A security prompt is displayed.
4. Click *Confirm*.

You have deleted a custom property.

2.1.5.4 Exporting and Importing Custom Properties

1. Click *> Administration > Brand Template Builder > Custom Properties*.
2. Click *Export*.

   The created data are collected in the Excel file. Your operating system will prompt you to open or save the file.
3. Open the file and add data.
4. Save the file.
5. Switch back to *> Administration > Brand Template Builder > Custom Properties*.
6. Click *Import*.

   The *Import upload* dialog opens.
7. Drag the file with the saved data to the upload area or click to select the file on your computer.
8. Click *Upload*.

The file is uploaded; new data is added to the data already created.

2.2 Configuring and Managing Search

To enable your users to search for templates and documents in the best possible way, you as administrator have the possibility to configure the search displayed under *> Brand Template Builder > Overview* or *> Brand Template Builder > Templates* or *> Brand Template Builder > Documents*. You can make the following settings:

- Enable or disable system and custom properties for the search
- Set the order of the search fields
- Define the grouping property; by default: custom property *Meta Templates*, which replaces the previous *Meta templates* feature; templates with the same value in the grouping property are displayed as one tile in a search result. Note that only custom properties are used as grouping property, see *Custom Properties* on page 38
- Manage search index, i.e. start indexing when needed

You make the first points under *> Administration > Brand Template Builder > Search Configuration > Default View*. You manage the search index for documents and templates under *> Administration > Brand Template Builder > Search Configuration > Search Index*.

Configuring search

1. Click *> Administration > Brand Template Builder > Search Configuration > Default View.*

   A list of all properties that can be searched is displayed. This includes the user-defined properties.

2. Use the left slide switches to define which properties are accessible to users in the search.
   - Activate the switches for the properties that should be accessible for users.
   - Disable the switches for the properties that should not be searched.
3. Determine the order of the properties in the display by sorting the properties in the list using drag and drop. Properties at the top are displayed in the searches on the left.
4. Use the right slide switches to set the grouping property. Note that you can only use custom properties as grouping properties.
5. Click *Save*.

You have configured the search.

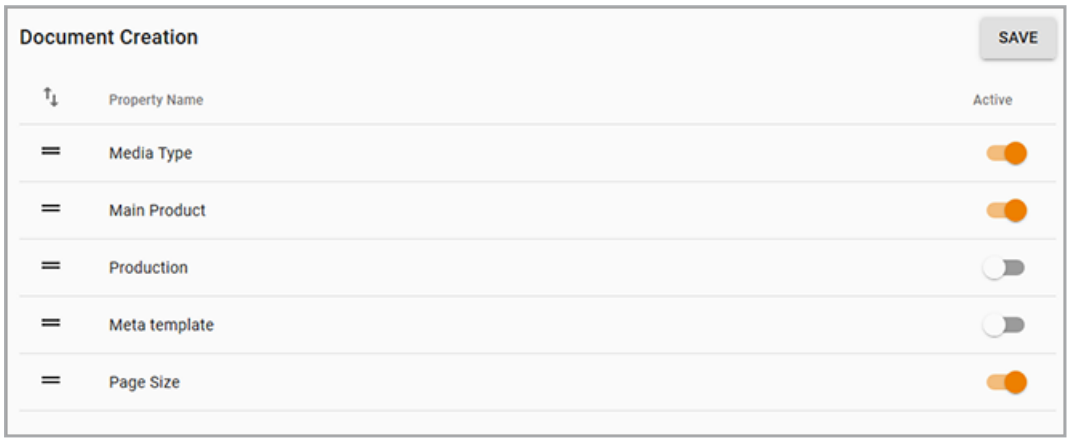
Start indexing

1. Click *> Administration > Brand Template Builder > Search Configuration > Search Index.*
2. Select:
    - Click *Update template index* to start indexing for templates.
    - Click *Update document index* to start indexing for documents.

Indexing is started. The respective area shows the status of the indexing. The last successful indexing is displayed.

2.3 Configuring Document Creation

In the search configuration, you may have set one of the custom properties as a grouping property. Templates with the same values in the grouping property appear as one tile in a search result. If the document creator selects a group, the appropriate template must be selected based on additional criteria. You as administrator define these criteria and their order under *> Administration > Brand Template Builder > Document Creation*:



The user-defined properties and the page size are available as selection criteria. Note that one of the user-defined properties is the grouping property and should therefore not be used as a selection criterion.

Use the slide switches to activate the properties that are to be used as selection criteria. Specify the order of selection by dragging and dropping the properties in the list; the properties are used from top to bottom in the selection. Click *Save* to save your settings.

2.4 Simplifying Customizing

Brand Template Builder provides a variety of functions for customizing. To help guide your document creators and simplify the process of creating documents, you can control the functions displayed and support the document creator with text control functions. That also includes defining workflows, for example.

- Editor setup: you can adapt the various editors to the working procedures in your company. See *Editor Setup* below.
- Text control: you can allow the document creator to use a spellchecker and hyphenation. For more information, see *Text Control* on page 57.
- Workflow: in the template, the template designer specifies which workflow must be performed for document approval. This workflow must be created accordingly in the administration. See the administration manual in *Additional Documentation* on page 424.
- System messages: choose how system messages are displayed in Brand Template Builder. See *System Messages* on page 60.

2.4.1 Editor Setup

You can adapt the various editors to the working procedures in your company. This applies to the following interfaces:

- Template Design: in Template Design, the template designer chooses the rules for how a document can be changed by the document creator. You can partly control the Template Design functions. See *Configuring Template Design* on the facing page.
- Document editor: in the document editor, the document creator edits the content of the document. You can deactivate functions that are not needed or specify how they are displayed. For more information, see *Document Editor* on page 50.
- Rich text editor: the document creator can edit texts in rich text editors. You can configure the editing functions provided in the rich text editor in the settings. The template designer can assign the settings to different text boxes to simplify text editing for the document creator. See the administration manual on the *Additional Documentation* on page 424 page.

2.4.1.1 Configuring Template Design

In Template Design, the template designer chooses the rules for how a document can be changed by the document creator. You can partly control the Template Design functions.

You configure Template Design with the following system settings under *> Administration > System Configuration > System Settings*:

Attribute *Minimum resolution in dpi*

Turn the visibility of the attribute *Minimum resolution in dpi* on or off. If the attribute is visible, the template designer can recommend a minimum resolution for images in documents with this attribute. If the attribute is not visible, then the minimum resolution of the setting *Media Pool: Attribute Print quality minimum resolution* is applied.

Alignment Matrix

Select whether the alignment matrix is displayed with 3 x 3 or 4 x 4 fields. The template designer uses the alignment matrix to specify how the position of boxes can be changed if the document creator changes the size of the document.

Attribute *Options for advertising material production*

Select the options that are available for the attribute *Options for advertising material production* when creating a template:

- 1: Only the option *Do not select printing offices or warehouses* is available.
- 2: The user can set *Only select printing offices*.
- 3: The user can select all options.

Attribute *Options for advertising material production* default

Select the default value for the attribute *Options for advertising material production*:

- 1: Do not select printing offices or warehouses
- 2: Select printing office only
- 3: Select printing office, warehouse and further recipients

Function *Crop marks* default

Select the default value for the function *Crop marks* when creating new templates.

2.4.1.2 Document Editor

In the document editor, the user edits the content of the document. You can deactivate functions that are not needed or specify how they are displayed. The designer can assign a specific editor preset to each template. For example, you can define:

- That the document will open directly in the document wizard and not on the overview page of the customizing wizard.
- The checkboxes, buttons, or menus to show or hide. You can see an overview in the Parameters section below.

To create editor presets or edit existing ones, click *> Administration > Brand Template Builder > Editor Presets*. An overview of all the document editor settings created in the BrandMaker system is displayed.

Associated Tasks

- *Adding an Editor Preset* on page 56
- *Editing an Editor Preset* on page 56
- *Deleting an Editor Preset* on page 57

Parameters

You can set the following parameters for the document editor:

Name	Description
Name	Enter the name of the editor preset. You can create language versions if required (> *Edit all languages*).

Available Content in the Toolbar

Name	Description
Zoom	Choose whether document creators can zoom in and out of the document preview. You can specify the default zoom level that is used to display the document.
Pagination	Choose whether document creators can browse through multi-page documents.

Name	Description
Update	• *Refresh current page*: this allows the document creator to refresh the current displayed page. • *Refresh all pages*: this allows the document creator to refresh all of the pages in multiple-page Brand Template Builder documents simultaneously. • *Live Preview*: activate the real-time preview. The preview image is updated automatically. If you set *Activated* in the selection list, the function is activated by default.
More Actions	Specify which functions can be called via the *More Actions* button: • *Template details*: document creators can call the detailed view of the template. • *Document details*: document creators can call the detailed view of the document. • *Send by E-Mail*: document creators can send the document by e-mail. • *Import/Export*: document creators can save the document as a print template (INDD) and upload it to Brand Template Builder again. • *Edit document grid*: document creators can change the size of the document grid. • *Manage data object groups*: document creators can group together content elements on the current page in data object groups. • *Create a new Job*: document creators can create a job for the document. • *Review Manager*: document creators can start a review for the current preview. • *Show Elements*: specify whether the document creator can display/hide the object handles. In the dropdown list, you can choose whether the function is activated or deactivated when you first open the document. • *Show document grid*: Specify whether the document grid can be displayed when a document is opened on the Layout tab. Dynamic image boxes and dynamic Smart Grids can only be placed when the document grid is displayed. If you set *Activated* in the selection list, the function is activated by default. • *Disable HTML links*: choose whether the document creator can deactivate HTML links. If you set *Activated* in the selection list, the function is activated by default.

Name	Description
Download	Document creators can download the document either using a low-resolution method or - if the document creators have the appropriate authorizations - in the original format. High-resolution methods are available only after the template is finalized or when checking the template.

Available Content in the Sidebar

Name	Description
Document	Choose whether the document creator can see the *Document* tab. If the tab is visible, define the information that can be accessed: • *Information*: information that the designer entered for the document creator while designing the template. • *Properties*: the document properties are displayed and can be changed. • *Choose variant*: the selected variant is displayed and can be changed. • *Document size*: the size is displayed and can be changed if necessary. • *Print Order:* the settings for a print order are displayed and can be edited here. • *Publish in module Media Pool*: if settings are made in this step in the customizing wizard, the settings are displayed and can be changed.
Pages	Choose how document creators can control the page view. • *Page/Print view*: document creators can switch between the page and print view. Specify which view is used by default when the document is opened. • *Show only editable pages*: by activating this checkbox, document creators can hide any pages that cannot be edited.
Categories	Document creators can link the grids in a document to a category on the *Categories* tab.
Layout	Document creators can select linked Smart Groups on the *Layout* tab. The size of the Smart Groups can be displayed in the sidebar. • *Show only fitting layouts*: choose whether the document creator can display only fitting layouts. If you set *Activated* in the selection list, the function is activated by default. • *Show Smart Group size*: choose whether the size of Smart Groups is displayed.

Name	Description
Data objects	Document creators can link the grids to a data object on the *Data objects* tab. They can use a search field to search through the list of displayed data objects. The display can also be changed to data objects for a different locale or restricted to a category.

Content	Document creators can edit the text and image boxes of the document in the Content tab. If you want to specify how the editable contents are displayed to the document creator on the tab by default, activate the checkbox *Displayed editable content*. Select one of the following options from the drop-down list to the right of the checkbox:
	• *Show only the selected variable*: Only the variable selected on the page is displayed on the tab.
	• *Group editable contents of the current page*: If you select this entry, a second list is displayed on the tab for the document creator. In this list the boxes are grouped according to the following scheme:
	  • Each Smart Grid is listed individually.
	  • Other editable contents are summarized under the entry *General page contents*.
	• With this setting, the document creator can call up each Smart Grid one after the other and other content in summary form. You can also activate the checkbox *Open new selection dialogs automatically*. If this checkbox is activated, the selection dialog boxes for layout and data objects are opened automatically as soon as they are displayed on the tab.
	• *Show all editable content on current page*: With this setting all variables of the page are listed one below the other on the tab.
	If you activate the checkbox *Show "Restore original text" button*, the document creator can undo the editing in text variables and restore the designer's original text.

Other Settings

Name	Description
Default tab	Define the tab that is displayed when the Document Editor is opened.
Dynamic Image Boxes	Document creators can create dynamic image boxes on a document page.

Name	Description
Show IDs	When you edit a document, the document ID and template ID are displayed.
Default width of the sidebar	Define the initial width of the sidebar.
Show on start	Choose whether the document editor or customizing wizard is opened first when customizing a document.
Data object details	Specify that data object details for the selected data objects are displayed on the Content tab.
Help texts	Define whether help texts are displayed as tooltips and icons or in a separate area. When you select the first checkbox *Show as icon and tool tip*, the help text is displayed in step 3 of the customizing wizard (*Edit document*) when the user moves the mouse over the field for the relevant variable on the *Content* tab. When you select the second checkbox *Show as help text area*, the help text is displayed in a designated area below the variables on the *Content* tab.

Name	Description
Document creation	Specify the model according to which the documents are named: • Name „Untitled“: The document is not named automatically. The document creator enters the name either in the Customizing Wizard or when saving it for the first time or - if activated - on the *Document* tab of the document editor. • <Template Name>: The document automatically gets the name of the template. • <Template Name> - <Creation Date>: The name consists of the template name and the creation date, separated by the string *space-hyphen-space*. • <Template Name> - <Document ID> - <Creation Date>: The name is composed as in the previous scheme, supplemented by the ID of the document. • <Template Name> - <Variable(s)>: The name is composed of the template name and the values of text boxes, which the designer marks accordingly in the template design step 4. Several variables are separated by a space. • <Variable(s)>: The name is composed of the values of text boxes, which the designer marks accordingly in the template design. Several variables are separated by a space. Note that the following applies to the patterns with variable contents: The value of the variable is transferred once when the document name is created. Subsequent changes to the variables are not updated. These patterns are suitable if the document name is assigned after editing the document contents.

System Settings

You can also influence the document creator with the following system settings under *> Administration > System Configuration > System Settings*:

System setting	Description
Document editor tab *Content* variable maximum number	Enter the maximum number of variables that are displayable on the *Content* tab in the document editor. If the total number of variables on one page exceeds the entered value, then only the selected variable is shown on the *Content* tab. A limitation of the maximum number of displayable variables on the Content tab has a favorable effect on performance.

System setting	Description
Document editor tab *Data objects* active data objects	Choose whether the document creator sees only finalized data objects or also active data objects on the *data objects* tab in document editor step 3: if the function is active, then the user sees active and finalized data objects. If the function is deactivated, then the document creator sees only finalized data objects.
Real time preview timeout	Enter the timeout of the real time preview in milliseconds.
Text variables	Activate or deactivate the replacement of variables with their value at the time an instance is created.

2.4.1.2.1 Adding an Editor Preset

1. Choose *> Administration > Brand Template Builder > Editor Presets*.
2. Choose *Add*.

   The *Edit Editor Preset: New preset for these templates* dialog box opens.
3. Enter a name.
4. Edit the default settings.
5. Click *Save*.

The dialog box closes. The editor preset is displayed under the entered name in the overview. Template designers can assign the editor preset to a template.

2.4.1.2.2 Editing an Editor Preset

1. Choose *> Administration > Brand Template Builder > Editor Presets*.
2. Click the editor preset that you want to edit.
3. Click *Edit*.

   The *Edit Editor Preset: Setting Name* dialog box opens.
4. Change the functions that the document creator requires.
5. Click *Save*.

The dialog box closes. The editor preset can be used with the changed presets immediately.

2.4.1.2.3 Deleting an Editor Preset

1. Choose > *Administration* > *Brand Template Builder* > *Editor Presets*.
2. Click the editor preset that you want to delete.
3. Choose *Delete*.

   If the editor preset is in use, a dialog box in which you can assign a different editor preset to the templates opens.
4. Select an editor preset in the picklist.
5. Choose *OK*.

The dialog box closes. The editor preset is deleted. In the templates in which the deleted editor preset was used, your selected editor preset is now used.

2.4.2 Text Control

You can allow the document creator to use a spellchecker and hyphenation.

Special Characters and Spellchecker

If you want it to be easy to add special characters in the texts or want to use a spellchecker, you require the following custom structures.

- Special characters: W2P_SPECIAL_CHARACTERS: note that this custom structure is not required to use special characters. This structure makes it easy for the document creator to access the special characters on the *Content* tab in the document editor:
  - Text boxes without formatting: dropdown list on the *Content* tab
  - Text boxes with formatting from the rich text editor: as a second tab in the *Special characters* dialog box when the special character function is activated
- Spellchecker: SPELLCHECKER_LANGUAGES

Note that this custom structure is created and maintained by BrandMaker. For more information, contact your contact person.

Hyphenation

To use hyphenation, you require a custom structure. It can be a standalone custom structure that contains only the language codes from the table below. However, you can also insert a custom structure that you are already using in your template and to whose objects a language can be uniquely assigned for hyphenation. An

example is a custom structure that contains all of the affiliates of a company:

- New York: English (United States of America)
- London: English (United Kingdom)
- Los Angeles: English (United States of America)
- Copenhagen: Danish
- Berlin: German (Germany)
- Etc.

Note that you must use the codes from the table below as the attribute values (name of the internal language identifier).

Language	Code (name of the internal language identifier)
No language	NEUTRAL
Arabic	Arabic
Bulgarian	Bulgarian
Chinese (traditional)	Chinese: Traditional
Chinese (simplified)	Chinese: simplified
Danish	Danish
German (Germany), regulations before 1996	German: Traditional
German (Germany), regulations based on the 1996 reform	German: Reformed
German (Germany), regulations based on the 2006 reform	de_DE_2006
German (Switzerland), regulations before 2006	German: Swiss
German (Switzerland), regulations based on the 2006 reform	de_CH_2006
English (Canada)	English: Canadian
English (United Kingdom)	English: UK
English (United States of America)	English: USA
English (United States of America), medical English	English: USA Medical

Language	Code (name of the internal language identifier)
English (United States of America), legal English	English: USA Legal
Estonian	Estonian
Finnish	Finnish
French (Canada)	French: Canadian
French (France)	French
Greek	Greek
Hebrew	Hebrew
Indian (Bengali)	bn_IN
Indian (Gujarati)	gu_IN
Indian (Hindi)	hi_IN
Indian (Kannada)	kn_IN
Indian (Malayalam)	ml_IN
Indian (Marathi)	mr_IN
Indian (Oriya)	or_IN
India (Punjabi)	pa_IN
Indian (Tamil)	ta_IN
Indian (Telugu)	te_IN
Italian	Italian
Japanese	Japanese
Catalan	Catalan
Korean	Korean
Croatian	Croatian
Latvian	Latvian
Lithuanian	Lithuanian
Dutch, regulations before 2005	Dutch

Language	Code (name of the internal language identifier)
Dutch, regulations based on the 2005 reform	nl_NL_2005
Norwegian (Bokmal)	Norwegian: Bokmal
Norwegian (Nynorsk)	Norwegian: Nynorsk
Polish	Polish
Portuguese (Brazilian)	Portuguese: Brazilian
Portuguese (Orthographic Agreement)	Portuguese: Orthographic Agreement
Portuguese (Portugal)	Portuguese
Romanian	Romanian
Russian	Russian
Swedish	Swedish
Slovak	Slovak
Slovenian	Slovenian
Spanish (Castilian)	Spanish: Castilian
Czech	Czech
Turkish	Turkish
Ukrainian	Ukrainian
Hungarian	Hungarian

2.4.3 System Messages

Choose which system messages are displayed in Brand Template Builder. You configure the system messages with the following setting under *> Administration > System Configuration > System Settings*:

Name	Description
System messages maximum number	Enter the maximum number of system messages shown in Brand Template Builder. The default value is 5. If you enter the value 0, then an unlimited number of system messages is shown.

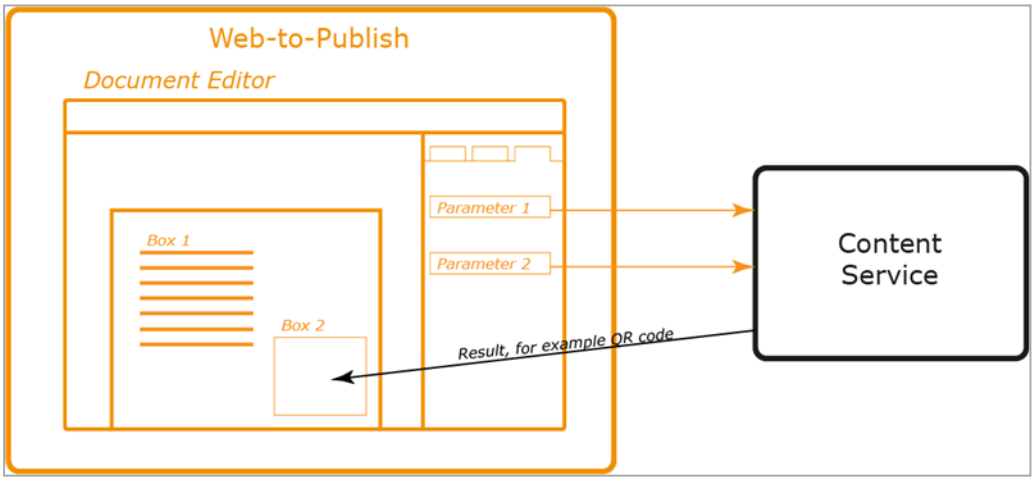
2.5 Supplying Content Centrally

Specify the sources in which content can be managed centrally and consistently. One example is address data. The document creator accesses the sources and can effortlessly use the data in the documents. The following sources are available:

- Content service: a content service is an external service that transfers data to Brand Template Builder. The content service uses the data to calculate a result, such as a barcode or price, and sends the result back. See *Content Service* below.
- Custom structures: in custom structures, you can arrange data in hierarchical tables. As the administrator, you manage the tables, while the document creator centrally queries the data from them. See *Custom Structures* on page 74.

2.5.1 Content Service

A content service is an external service that transfers data to Brand Template Builder. The data is used to calculate a result, such as a barcode or price, and sends the result back to an INDD template.



The content service may be your own service or a service provided by BrandMaker. Content services that are accessible via a public URL and that return the result based on the called URL are supported.

Work Steps

To use a content service as an external source, you must perform the following work steps:

1. If you want to use your own service: you arrange the programming of a suitable content service that meets the BrandMaker system requirements. See *Information for Content Service Programmers* on page 69.
2. The module administrator establishes the connection to the content service. See *Configuring a Connection to a Content Service* on page 72.
3. The template designer links a box to the content service. Refer to the following sections:
    - For text boxes: *Configuring a Fully Changeable Text Box as the Result of a Content Service* in *Configuring a Fully Changeable Text Box* on page 206
    - For image boxes: *Configuring a Fully Changeable Image Box as the Result of a Content Service* in *Configuring a Fully Changeable Image Box* on page 226
4. Depending on the configured parameter type, the document creator enters the parameter values or makes the relevant selections.

The content service returns the result to the box.

Default Content Services

BrandMaker provides you with two services that you can use in your templates:

- *EAN code generator:* The EAN code generator converts a text into an EAN code and returns the code as a PNG file.
- *QR code generator:* The QR code generator converts a text into a QR code and returns the code as a PNG file.

Restrictions

The following restrictions apply to both code generators:

- The PNG has a white margin. The size of this margin cannot be manipulated.
- The background is always white. Other colors or transparency are not available.
- The text line below the EAN code may be longer than the code itself and therefore may not be fully displayed in the image.

For more information, see *Default Content Services* on page 65.

Parameter Types

You can use the following parameter types when configuring the content service:

- *Input field*: with this parameter type, an input field is displayed for the parameter on the *Content* tab in the document editor. The template designer can configure this field in the same way as the other variables. The only exception is that a rich text editor cannot be assigned to the variables. Only plain text can be entered.
  The document creator edits the field. The entered value is transferred to the content service.
- *Smart Dropdown*: with this parameter type, the module administrator assigns a Smart Dropdown to the parameter while configuring the content service. The document creator chooses the value.
- *Box height* and *Box width*: you set these parameter types to transfer the height and width for the image to be generated. You can choose the unit in which a value is handled: millimeters, centimeters, or inches. Note that entered values are rounded to whole numbers. BrandMaker therefore recommends leaving the default setting as Millimeter (mm).
- *Validity From/To*: set this parameter type to transfer the validity date from the document properties. If a document has unlimited validity, a parameter of this type remains empty. The date format is YYYYMMDD.
- *Affiliate ID*: set this parameter type to transfer the affiliate ID from the document properties. Note that the affiliate ID is used, not the affiliate name that may be provided in a custom object.

Information for the Programmer

The programmer must be aware of certain information to create a content service for Brand Template Builder (see *Information for Content Service Programmers* on page 69). You must ensure that this information is made available to the programmer.

Associated Tasks for the Module Administrator

- *Configuring a Connection to a Content Service* on page 72
- *Editing a Connection to a Content Service* on page 73
- *Deleting a Connection to a Content Service* on page 74

Associated Task for the Template Designer

Refer to the following sections:

- *Configuring a Fully Changeable Text Box as the Result of a Content Service* in *Configuring a Fully Changeable Text Box* on page 206
- *Configuring a Fully Changeable Image Box as the Result of a Content Service* in *Configuring a Fully Changeable Image Box* on page 226

Interface

For detailed information about the corresponding interface functions, see *Content Services* on page 384.

2.5.1.1 Default Content Services

BrandMaker provides you with two services that you can use in your templates:

- *EAN code generator:* The EAN code generator converts a text into an EAN code and returns the code as a PNG file.
- *QR code generator:* The QR code generator converts a text into a QR code and returns the code as a PNG file.

Restrictions

The following restrictions apply to both code generators:

- The PNG has a white margin. The size of this margin cannot be manipulated.
- The background is always white. Other colors or transparency are not available.
- The text line below the EAN code may be longer than the code itself and therefore may not be fully displayed in the image.

EAN Code Generator

The EAN code generator converts a text into an EAN code and returns the code as a PNG file. You can also define the EAN type, rotation and revolution.

URL

You access the EAN code generator through the following URL:

https://content-services.brandmaker.com/Barcode/EanGenerator?eanType=$type$&code=$code$&dpi=dpi&orientation=$orientation

Note

Please note that a soft return is added to this URL after "eanType=" to ensure that it is displayed correctly in our publications. If you copy the URL, make sure that you delete the soft return.

EAN Type

In the *eanType* parameter, you can choose from the following EAN types:

Type	Parameter value
EAN-8	Ean8
EAN-13 Output size at 150 dpi: 224 x 105	Ean13
EAN-128 Output size at 150 dpi: 191 x 110; EAN-128 is also known as GS1-128	Ean128
Code128 Output size at 150 dpi: 123 x 110	Code128
DataMatrix	DataMatrix

Data

You can use the *code* parameter to transfer the string to be displayed in code to the service. The string must not contain verification numbers because the verification numbers are automatically determined and attached by the service.

Resolution

In the *dpi* parameter, you can enter a whole number between 1 and 22000 to define the resolution.

Rotation

In the *orientation* parameter, you can choose from the following rotation settings:

Orientation	Parameter value
No rotation	0

Orientation	Parameter value
Rotated 90° counter-clockwise	90
Rotated 180°	180
Rotated 270° counter-clockwise	270
Rotated 90° clockwise	-90
Rotated 180°	-180
Rotated 270° clockwise	-270

Examples

EXAMPLES

- https://content-services.brand-maker.com/Barcode/EanGenerator?eanType=Ean8&code=1234567&dpi=120&orientation=90
- https://content-services.brand-maker.com/Barcode/EanGenerator?eanType=Ean13&code=123456789012&dpi=150&orientation=0
- https://content-services.brand-maker.com/Barcode/EanGenerator?eanType=Code128&code=BrandMaker%20GmbH&dpi=150&orientation=90

Note

Please note that a soft return is added to these URLs after "eanType=" to ensure that they are displayed correctly in our publications. If you copy a URL, make sure that you delete the soft return.

QR Code Generator

The QR code generator converts a text into a QR code and returns the code as a PNG file.

URL

You access the code generator through the following URL:

https://content-services.brandmaker.com/Barcode/QRGenerator?QR=$string$

Data

Use the *QR* parameter to transfer a string to the service.

Examples

EXAMPLES

- URL:
  https://content-services.brandmaker.com/Barcode/QRGenerator?QR=
  http://www.brandmaker.com
- Business card:
  https://content-services.brandmaker.com/Barcode/QRGenerator?QR=
  BEGIN:VCARD%0AN:firstname;lastname;;;%0AORG:BrandMaker%
  20GmbH;%0ATEL;WORK;VOICE:+49%20%28721%29%202012519-
  13%0ATEL;WORK;FAX:+49%20%28721%29%202012519
  98%0AADR;WORK:;;Rueppurrer%20Str.%201;Karlsruhe;76137;;
  Germany%0AURL:http://www.brandmaker.com%0AEMAIL;
  PREF;INTERNET:jdoe@example.com%0AEND:VCARD

Note

Please note that soft returns are added to these URLs after "eanType=" to ensure that they are displayed correctly in our publications. If you copy a URL, make sure that you delete the soft returns.

Configuring a Connection to a Default Content Service

1. Go to *> Administration > Brand Template Builder > Content Services*.
2. Choose *Connect Service*.
3. Enter the *Name*, *Label*, and *Help Text* for the new connection to the default content service.
4. Enter the URL:
   - For the EAN code generator:
     services.brandmaker.com/Barcode/EanGenerator?eanType=
     $type$&code=$code$&dpi=dpi&orientation=$orientation$
     Note: please note that a soft return is added to this URL after

"eanType=" to ensure that it is displayed correctly in our publications.

- For the QR code generator:
  https://content-services.brandmaker.com/Barcode/QRGenerator?QR=$string$

5. Select the return type *Image*.
6. Replace the parameters (*$...$*) in the URL (for example, *dpi* for the desired resolution for the EAN code):
   - If you want the parameter value to be fixed, enter the desired value directly into the URL.
   - If you want the parameter to be variable, create the parameter in which the template designer or document creator enters the value.
     1. Click *Add Parameter*.
     2. In the displayed dialog box, enter the parameter name in the *Replace* field (for example, *dpi*).
     3. Enter the label (for example, *Resolution*).
     4. Select the parameter type and edit any other fields required for the type. For a description of the parameter types, see *Content Service* on page 62.
     5. Click *Save*.
     6. Repeat the process until you have created all the required parameters.
7. Click *Save*.

You have established the connection to a default content service.

Note

You can use a default content service multiple times in your system, for example, by establishing a connection for each EAN type.

2.5.1.2 Information for Content Service Programmers

Attention

The content service programmer requires the information provided in this section. Ensure that the information is made available to the programmer.

Content services that are accessible via a public URL and that return the result based on the called URL are supported.

How it Works

Brand Template Builder replaces each part of the URL, which is defined as a parameter in the service configuration. The result of the content service is added to the document. Each parameter is replaced by the set value while generating the preview and during any other rendering. If a value is not entered for a parameter, the parameter value remains empty.

EXAMPLE

The following content service is used:

https://content-services.brandmaker.com/Barcode/EanGenerator?eanType=ean8&code=$code$&dpi=120&orientation=0

If the document creator does not fill the *$code$* parameter, the following call is sent to the service:

https://content-services.brandmaker.com/Barcode/EanGenerator?eanType=ean8&code=&dpi=120&orientation=0

Note

Please note that a soft return is added to these URLs after "eanType=" to ensure that they are displayed correctly in our publications. If you copy the URLs, make sure that you delete the soft return.

Prerequisites

Accessibility

The content service must be accessible via a GET request to a public URL (https) because no authentication mechanisms are supported.

Result

The returned result must be either a text string or an image in JPG or PNG format. The same result must always be delivered for the URL because the result is cached in the BrandMaker system until the cache is deleted manually by clicking *> Administration > System Maintenance > Maintenance Functions > Clear cache of content services*.

Troubleshooting

If content creation fails, we recommend sending an invalid response so that Brand Template Builder does not have to wait for the timeout (5 minutes). In addition, please do not send an error message in a valid target format to ensure that Brand Template Builder does not store the error message temporarily until the next call.

If an invalid response is detected or the content service cannot be reached, Brand Template Builder informs the document creator that the page contains errors. The document creator then cannot finalize the document in this case.

Encoding

Before the URL parameter is replaced, the content is encoded to ensure that a valid URL is produced. For example, *Hello World!* is encoded as *Hello+World%21*.

Calls and Caching

Any time that the document is rendered (for example, when updating the preview), the parameters are checked and the content service is contacted. To reduce the communication workload and wait times, the returned result is stored in the BrandMaker system until the cache is deleted manually using *> Administration > System Maintenance > Maintenance Functions > Clear cache of content service*. The content service is contacted again only if a response for the parameter values has not been cached.

Parameter Sources

Brand Template Builder can fill parameters with content from a variety of sources.

- *Input field*: with this parameter type, an input field is displayed for the parameter on the *Content* tab in the document editor. The template designer can configure this field in the same way as the other variables. The only exception is that a rich text editor cannot be assigned to the variables. Only plain text can be entered.
  The document creator edits the field. The entered value is transferred to the content service.
- *Smart Dropdown*: with this parameter type, the module administrator assigns a Smart Dropdown to the parameter while configuring the connection. The document creator chooses the value.
- *Box height* and *Box width*: you set these parameter types to transfer the height and width for the image to be generated. You can choose the unit in

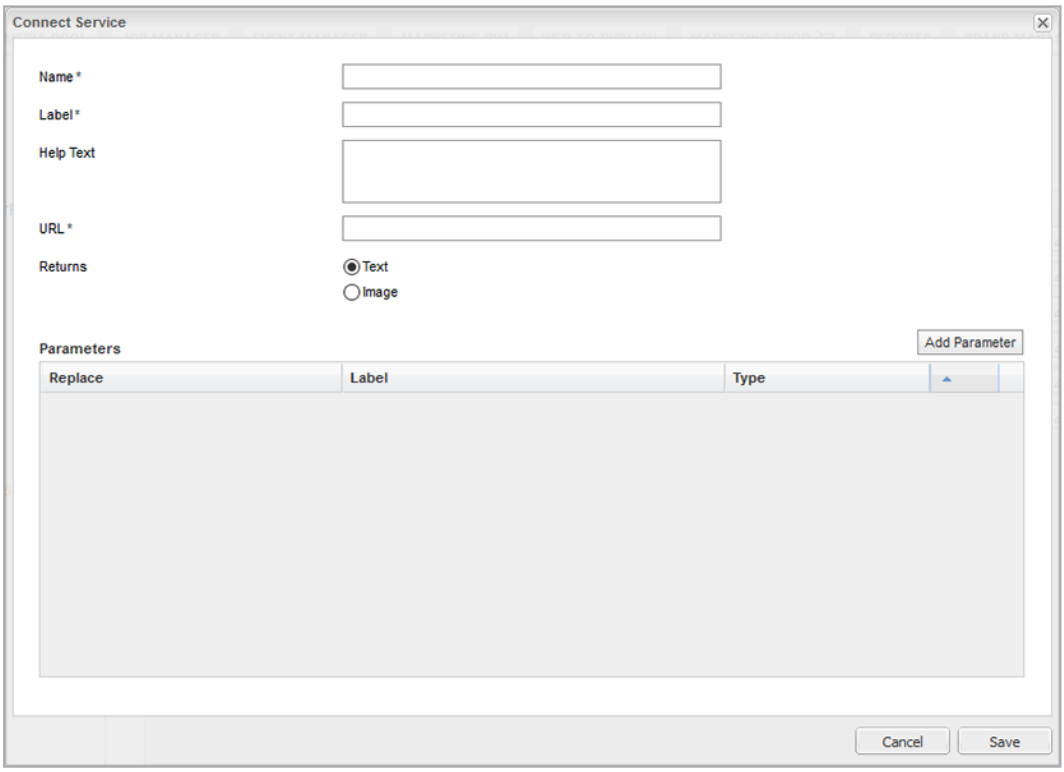
which a value is handled: millimeters, centimeters, or inches. Note that entered values are rounded to whole numbers. BrandMaker therefore recommends leaving the default setting as Millimeter (mm).

- *Validity From/To*: set this parameter type to transfer the validity date from the document properties. If a document has unlimited validity, a parameter of this type remains empty. The date format is YYYYMMDD.
- *Affiliate ID*: set this parameter type to transfer the affiliate ID from the document properties. Note that the affiliate ID is used, not the affiliate name that may be provided in a custom object.

2.5.1.3 Configuring a Connection to a Content Service

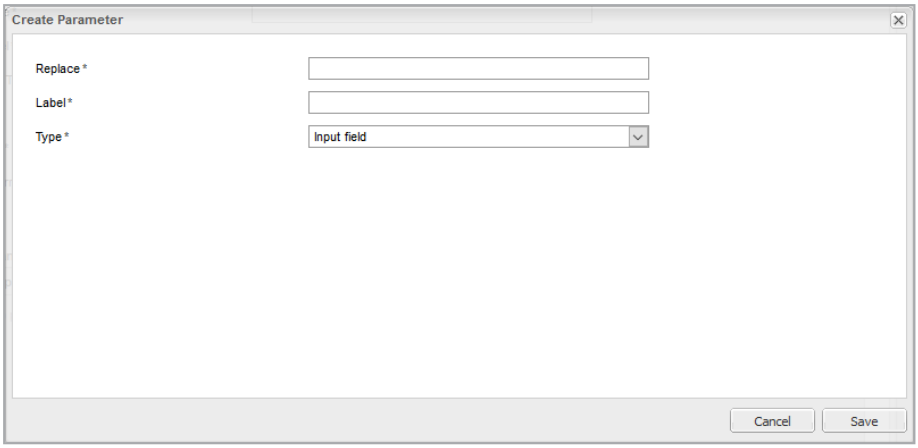
1. Choose > *Administration* > *Brand Template Builder* > *Content Services*.
2. Choose *Connect Service*.

   The following dialog box opens:



3. Enter the *Name*, *Label*, and *URL* of the content service.
4. Recommended: enter a description for the template designer in the *Help Text* field.
5. Specify what the service returns, a *Text* or *Image*.
6. Click *Add Parameter*.

The following dialog box opens:



7. In the *Replace* field, enter the name that you want to replace with the parameter value in the URL.
8. In the *Label* field, enter the name that the template designer or document creator sees if the parameter is an input parameter.
9. Select the parameter type and configure the additional settings based on the selected type (for example, by selecting a Smart Dropdown). For a description of the parameter types, see *Content Service* on page 62.
10. Click *Save*.
11. Repeat steps 6 to 9 for each required parameter.
12. Click *Save*.

You have configured the connection to the content service.

2.5.1.4 Editing a Connection to a Content Service

> **Note**
>
> Note that you can edit only non-critical settings such as the label or help text for a content service that is already being used in templates.

1. Choose > *Administration* > *Brand Template Builder* > *Content Services*.
2. Choose in the line of the content service that you want to edit.

   The *Edit Service Connection* dialog box is displayed.
3. Edit the fields.
4. Click *Save*.

You have edited the content service.

2.5.1.5 Deleting a Connection to a Content Service

> **Note**
>
> Note that you cannot delete a content service if the service is used in a template.

1. Choose *> Administration > Brand Template Builder > Content Service*.
2. Choose in the line of the content service that you want to delete.

   A confirmation prompt is displayed.
3. Click *Yes*.

The connection to the content service is deleted.

2.5.2 Custom Structures

In custom structures, you can arrange data in hierarchical tables. As the administrator, you manage the tables, while the user centrally queries the data from them when creating the document. For detailed information about custom structures, see the administration manual in the section *Additional Documentation* on page 424.

Filtering Extensive Custom Structures

To use custom structures in Brand Template Builder, you must also be able to filter extensive custom structures. You can filter extensive custom structures in two ways:

- Each custom object is assigned to an affiliate. The document creator will only see the objects assigned to his/her affiliate. If multiple affiliate IDs are assigned to the document creator, but none of them are selected, then the dropdowns for the document creator are displayed in a filtered manner: The document creator will only see entries whose affiliate IDs match their own list of IDs. If an affiliateID is selected for the document creator, then the document creator will see only the items of the selected affiliate ID.
- A label value is assigned to each custom object. One or more label values are also assigned to the document creator. The document creator can see only objects with a label that matches one of his or her own labels.

To filter custom structures using affiliates, you can assign the objects to an affiliate in two ways:

- *Manually*: if you create custom objects using an import, you can maintain the affiliate ID in the Excel list.
- *Automatically*: when a user creates custom structures under *> Administration > Data Structures & Workflows > Custom Objects & Structures > Affiliate Data*, the objects automatically receive the affiliate ID of the user that creates them.

Note that in both cases you can see the affiliate IDs to which the objects are assigned only by exporting the custom objects.

For you to use the second option with the labels, the custom structure must contain an attribute in which a clear classification characteristic can be entered for each custom object. This attribute must be a *Text*-type attribute. Note that only one characteristic can be entered for each object. The spelling must be exactly the same as the entry in the *Labels* field in the user profile, therefore pay attention to the uppercase and lowercase letters. If you have any questions, please contact your system administrator that manages user profiles. For more information, see *Filtering Extensive Dropdowns for the Document Creator* below.

2.5.2.1 Filtering Extensive Dropdowns for the Document Creator

Dropdowns based on a custom structure may contain a hundred or more data records (custom objects) under some circumstances. Selecting a custom object from such an extensive list is laborious, especially if a large number of the data records are irrelevant to the document creator. To make it easier to select the items, you can set up a filter for the dropdown. Note that this is possible only if you can classify the custom structures using a characteristic.

Examples

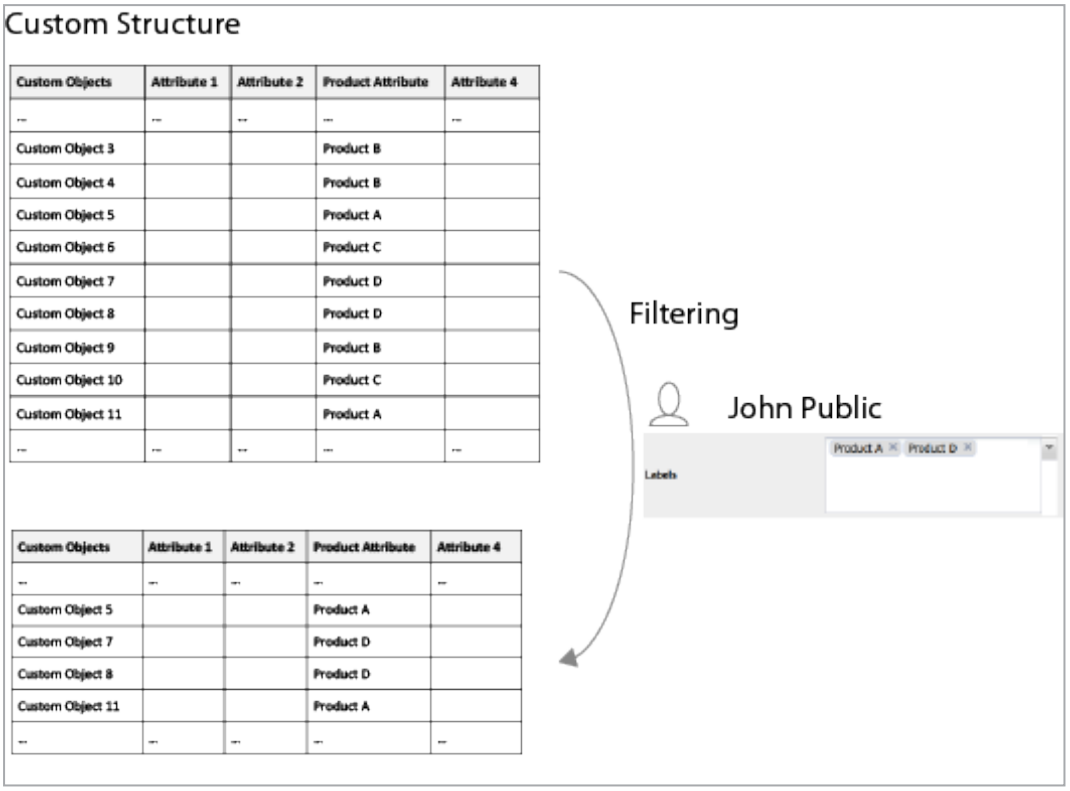
EXAMPLE 1

Each data record (custom object) can be uniquely assigned to a product. Each document creator is only responsible for one product or a selection of products.

EXAMPLE 2

Each data record (custom object) can be uniquely assigned to a dealer status. Each document creator has a dealer status.

How it Works



The classification characteristic must be assigned to the custom objects in an attribute. In the image, this is the *Product Attribute* column. The system administrator enters the document creator in the *Labels* field for one or more of the classification characteristics in the user profile. In the image, this is Max Mustermann, who is responsible for products A and D.

If you configure filtering for the dropdowns, the document creator can see only objects with an attribute value that matches one of his or her own labels. Therefore, for Max Mustermann, the list is limited to custom objects that are assigned to products A and D.

Prerequisite

The following conditions apply for configuring filtering:

- The custom structure contains an attribute in which a classification characteristic is entered.
- The characteristics must be entered in the *Labels* field in the user profile of the users that you want to be able to select the data record from the dropdown. If you have any questions, please contact your system administrator.

Filtering Extensive Dropdowns

1. Open a template that still has to be edited in step 1 of Template Design.
2. Click *Manage Dropdowns*.
3. Click *Add new dropdown*.
4. Enter a name in the input field.
5. From the selection menu, select a custom structure that you want to assign to the dropdown.
6. Activate the *Filter objects* checkbox.
7. In the *Attribute* selection list, select the attribute that contains the classification characteristic in the custom structure.
8. Click *Save*.

You have configured a new dropdown based on a custom structure. The dropdown is filtered and displayed for the document creator.

2.6 Displaying Texts and Tables

Texts and tables displayed in documents should be CI compliant. To achieve that, you must synchronize the BrandMaker system with your styles in the INDD files. There are multiple ways to control the display of content in Brand Template Builder.

Fonts

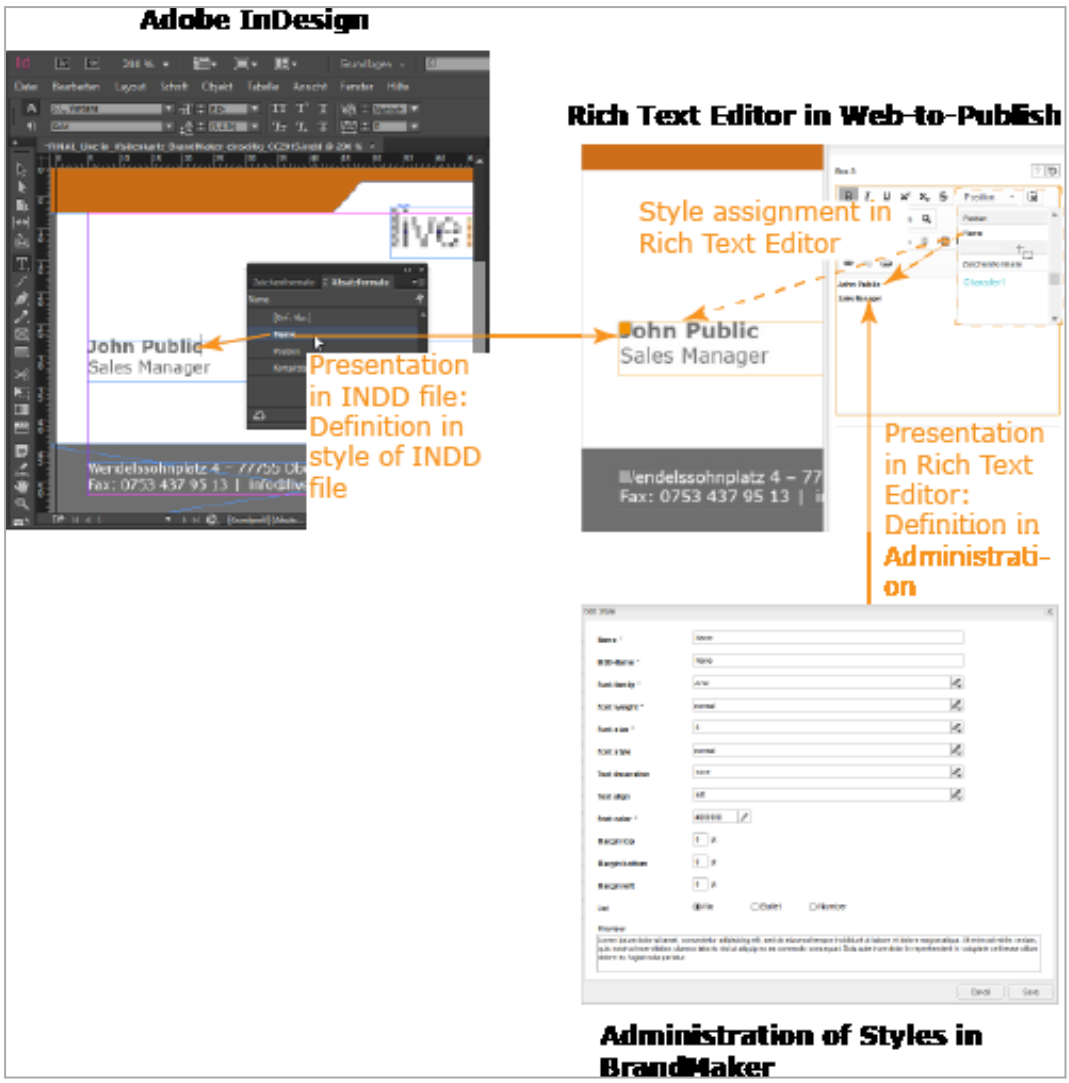
To create documents with the specified font types, the fonts used in the INDD file must be installed in OpenType format on the rendering server. BrandMaker installs the fonts. Contact your BrandMaker contact person.

Font Whitelist

You can create a font whitelist for the Media Pool module. With this feature, InDesign files are imported to the Media Pool only if the fonts used in the file are flagged on the whitelist. Note that the font whitelist is not enabled in every system. For more details, contact the Media Pool module administrator or your system administrator. Inform the template designer about any existing restrictions regarding the fonts. For more information about this subject, see the Media Pool administration manual (refer to *Additional Documentation* on page 424).

Displaying and Assigning Styles

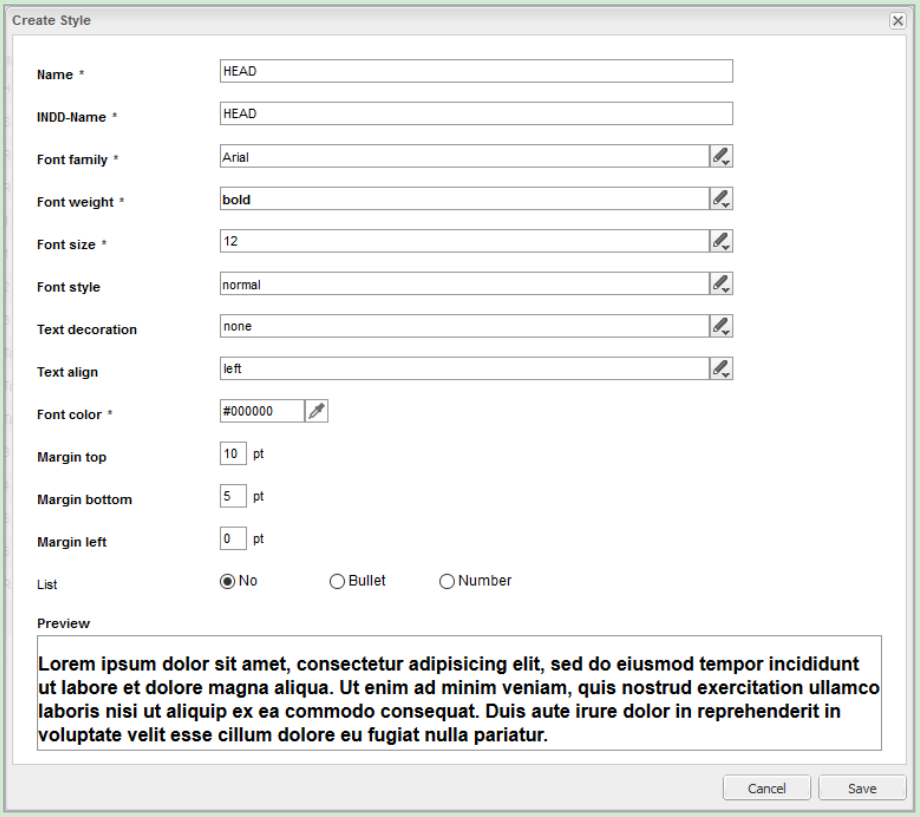
If you want to use standardized and CI-compliant styles in documents, the document creators must be able to assign these styles. Note how this works:



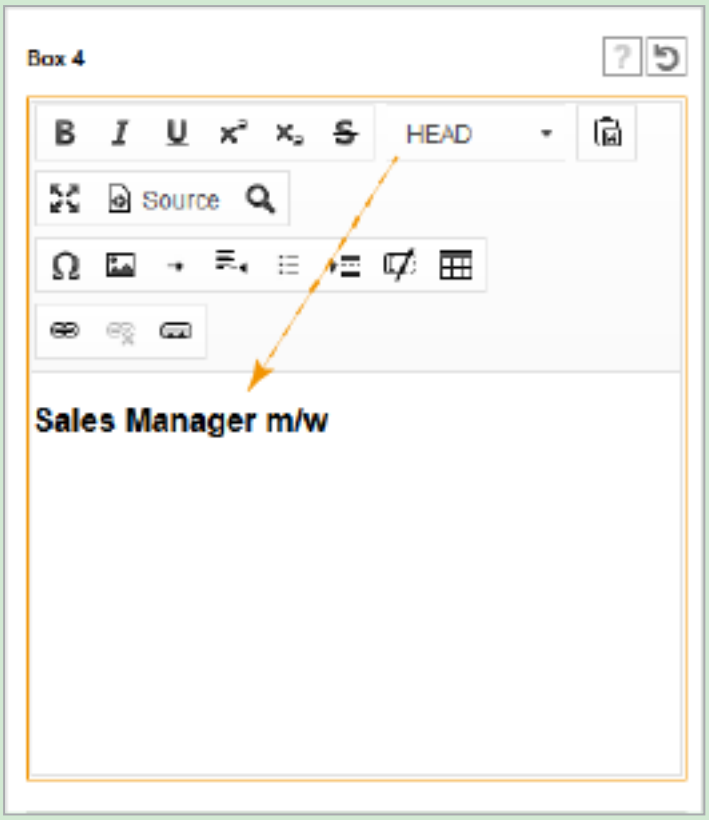
The document creator assigns a style to a text in the rich text editor in Brand Template Builder. The display of the style in the rich text editor is set in *> Administration > System Configuration > Rich Text Editor > Styles*. In the document, the text is displayed according to the specifications for the style in the INDD file.

EXAMPLE

Let us assume that you are using the style HEAD and you have created the style as follows under *> Administration > System Configuration > Rich Text Editor >Styles > Paragraph Styles*:



If a document creator uses the style in the rich text editor, the text is displayed in the rich text editor in Arial, 12 pt and bold and with additional settings:



Let us also assume that a document creator creates a poster in Brand Template Builder and uses the style HEAD to do so. In the INDD file, the style is defined with Verdana, 100 pt, and with a light weight. If the document creator assigns the style HEAD to the text in the rich text editor and then refreshes the preview in the document editor, the poster is displayed with the text in Verdana, 100 pt and with a light weight. This display is also used in a PDF created based on the document or on a print.

In another case, a document creator creates a job advert. The style HEAD is used for the job title. Since the job title is displayed on an orange background, the style is highlighted with a white font color in the INDD file. In addition, the font is defined in Verdana, 10 pt, and with a regular weight. In the rich text editor, the document creator assigns the style to the job advert. After refreshing the document preview, the job advert is displayed in Verdana, 10 pt, regular, and with a white font color.

Prerequisites

The following conditions must be fulfilled for document creators to be able to use styles in the way described in the example:

- You are using standardized styles throughout the company. The document creators know about the styles and their use.
  Note that the document creator is able to reset a paragraph, character, table, or cell to the default style. If you still want the display to be CI-compliant, you can also make the default styles CI-compliant.
- The styles are created in the BrandMaker system (*> Administration > System Configuration > Rich Text Editor > Styles*). Note that the names of the styles must be identical in the BrandMaker-System and in the INDD files, including the upper and lower-case spelling. You can also enter a label name for displaying the styles in the BrandMaker system.
- Use the following characters for the style names: A-Z, a-z, 0-9, -, _.
- If you want to use hyphenation, enable this feature in the paragraph styles.
- The template designer assigns a rich text editor configuration that permits the use of styles to the text box.

For more information, see the administration manual (in the section *Additional Documentation* on page 424).

2.7 Shaping Production

Make important decisions about the production of documents, such as the output methods available to the document creator and the print agencies that can be selected. For INDD documents, the following applies:

- To allow the document creator to publish INDD documents, you must make the output methods created on the InDesign renderer available in the BrandMaker system. The output method specifies how a document is printed. For example, a high or low-resolution PDF or an EPS can be generated from a document. For more information, see *Output of INDD Documents* below.
- Printing: you can configure various settings to ensure the process runs smoothly when creating print products from finalized INDD documents. See *Printing INDD Documents* on page 88.

2.7.1 Output of INDD Documents

To ensure that the document creator can output INDD documents, the InDesign renderer must be configured accordingly with the required output methods. The output method specifies which format and which properties are used to output a document. For example, a high or low-resolution PDF or an EPS can be generated from a document.

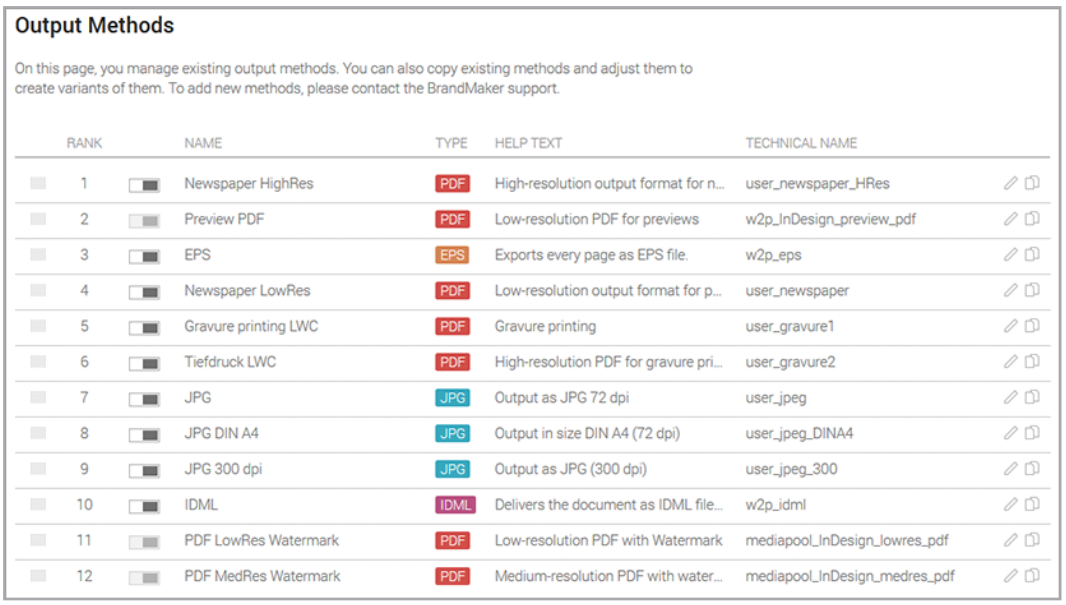
Note

The configuration of the Indesign renderer is maintained by BrandMaker. If you have any questions, please contact your BrandMaker contact person.

Distribution of Tasks

Ensuring that INDD documents can be output involves the following distribution of tasks:

- BrandMaker configures the InDesign renderer and ensures the output methods can be accessed in your system. It does so in consultation with the system administrator or module administrator.
- The system or module administrator edits the output method properties under *> Administration > Brand Template Builder > Output Methods* (see *Editing Output Methods* on page 87).



The system or module administrator can also use the output methods created by BrandMaker as a basis for creating output methods with different properties, such as one output in JPG with a watermark and one output without one. To do so, the administrator has to copy the output method (see *Copying an Output Method* on page 88).
In addition, the administrator uses the switch to decide which of the output methods are enabled in the system.
Lastly, the administrator rearranges the displayed output methods using drag and drop, if necessary. The order is particularly relevant when downloading documents in the *Marketing Shop* module. In this situation, the top high-resolution output method enabled in the template is used.

- The template designer assigns at least one output method to each template. If multiple output methods are assigned, a default can be selected. For more information, see *Production* on page 299.
- When outputting the document, the document creator chooses one of the options approved by the template designer.

Available Output Formats

INDD documents can be output in the following formats:

- PDF (in various resolutions). If you want to use the job options available in your company, see *Job Options as Output Methods* on page 86.
- EPS
- JPG (in various resolutions)
- IDML

Note that high-resolution methods are available only following finalization.

Properties of Output Methods

Property	Description	Editable?
Name	Display name of the output method. If you require a multilingual name, enter the text in the following format: ~{EN} English name ~{DE} German name Note that the entry is available only in the default languages enabled in your system. The default languages that can be enabled are: DE, EN, FR, IT, ES, PT, NL, NO, RU, ZH, JA, and KO.	Yes
Technical name	Technical name of the display method. The name must be unique. The technical name is required to uniquely address output methods via API.	Yes
Help text	Description of the output format. If you require a multilingual help text, enter the text in the following format: ~{EN} This is a help text. ~{DE} Dies ist ein Hilfetext. Note that the entry is available only in the default languages enabled in your system. The default languages that can be enabled are: DE, EN, FR, IT, ES, PT, NL, NO, RU, ZH, JA, and KO.	Yes
Availability	Choose whether the output method is available only for finalized documents. If the checkbox is enabled, you can also download documents that are in progress with the output format.	Yes
Remove empty pages	Note: only with the PDF output format. Choose whether empty pages in a PDF document are automatically deleted during the download. A page is also considered empty when only content from a master page is added.	Yes
Watermark	Choose an image from the Media Pool. During the download, the image is added to each page of the document as a watermark.	Yes

Property	Description	Editable?
Image size	Note: only with the JPG output format. Choose the size in which the document is output as a JPG. You have the following options: • *Define resolution*: enter the resolution. • *Resize proportionally*: specify the dimensions that you want the document to have at 72 dpi.	Yes
Format	Display of the output format	No
PDF Preset	Note: only with the PDF output format. Name of the job option used	

Preventing the Output of Low-Resolution PDFs

To prevent the document creator from accidentally using low-resolution PDFs for printing, you can prevent the output of low-resolution PDFs. To do so, edit the system setting described below under *> Administration > System Configuration > System Settings*.

Name	Description
Low resolution PDFs	Turn the generation and download of low-resolution PDFs on or off for documents whose advertising material production is set to *Only printing shop*: • *true* (default): the document creator is able to download low-resolution PDFs and to save them, for example, for a preview. • *false*: the document creator is not able to generate low-resolution PDFs. This setting can prevent the document creator from using low-resolution PDFs for printing, for example.

2.7.1.1 Job Options as Output Methods

You can use job options (PDF settings, file format *.joboptions) to standardize the creation of PDFs. To use the job options in Brand Template Builder as output methods, you must store the job option files and corresponding color profiles (ICC files) accordingly on the rendering server.

Job options are usually managed centrally. If you have any questions, contact your responsible IT department. Alternatively, you can access the job options using Adobe products such as Adobe Distiller, Adobe Acrobat, Adobe InDesign, Adobe Photoshop, or Adobe Illustrator.

Installing Job Options as Output Methods

If your system is hosted by BrandMaker, the job options are provided through the following process in the system:

1. You create a support ticket in which you request the installation of job options. Add the job options and, if necessary, ICC files to be installed to the ticket as an attachment.

   BrandMaker installs the job options and, if necessary, ICC files as per your specifications. An e-mail informs you when the ticket is closed.

2. Log into the system and go to *> Administration > Brand Template Builder > Output Methods*. The newly installed job options are displayed on this page.
3. Click the line next to a new job option.

   A dialog box for editing the output method opens.

4. Edit the fields.
5. Click *Save*.
6. Check whether the output mode is activated.
7. Rearrange the displayed output methods using drag and drop if necessary. The order is particularly relevant when downloading documents in the *Marketing Shop* module. In this situation, the top high-resolution output method enabled in the template is used.

The job options - and the new color profiles where applicable - can be accessed as output methods under the entered name in Brand Template Builder.

2.7.1.2 Editing Output Methods

1. Choose *> Administration > Brand Template Builder > Output Methods*.
2. On the line of the output method whose display you want to edit, click the icon.

   A dialog box for editing the output method opens.

3. Edit the fields.
4. Click *Save*.

You have edited the output method.

2.7.1.3 Copying an Output Method

1. Choose > *Administration > Brand Template Builder > Output Methods*.
2. On the line of the output method that you want to copy, click the icon.

   A dialog box for editing the properties opens.
3. Change the technical name.
4. Optional: edit additional fields.
5. Click *Save*.

You have copied the output method. The output method is created with the new properties.

2.7.2 Printing INDD Documents

You must configure various settings to ensure that print products can be seamlessly created based on finalized INDD documents. An administrator must maintain the available printing services and price lists, for example.

Distribution of Tasks

The roles below must fulfill various tasks to ensure that a finalized document can be printed:

- The system administrator manages price lists and printing services and decides which printing services a document creator can select.
- The template designer decides about the publication of the documents in the template (see *Production* on page 299):
  - The template designer chooses whether the documents can be printed and whether the print products are sent to him or her and/or to one or more warehouses. The warehouses correspond to the suppliers in the Marketing Shop module.
  - If printing is to be available, the template designer selects the price list and enters specifications for the order quantities.
- The document creator chooses one of the options that the administrator and template designer permit.

EXAMPLE

The example below is a possible document creator selection:

The document is printed by a printing service from his or her organizational unit with specified quantities and prices. One third of the print products is delivered to the document creator, and one third each is delivered to two Marketing Shop suppliers.

Associated Tasks for Administrators

- *Managing Printing Services* below
- *Configuring Order Number and Activity Code Validation* on page 91
- Price Lists: the price lists are not managed in the module configuration because the price lists are also used by the *Marketing Shop* module. Therefore, you should see the administration manual for more detailed information (refer to *Additional Documentation* on page 424).

Tasks for the Template Designer

For more information about the template designer tasks, see *Production* on page 299.

2.7.2.1 Managing Printing Services

You can store names and contact information in printing service management. You can also choose which printing services a document creator can select. In addition, you must choose how the printing service receives access to printing data.

Visibility of Printing Services for the Document Creator

The visibility of printing services for the document creator depends on two settings:

The Assignment to Organizational Units

You can assign organizational units to printing services. The document creator can see a printing service only if it is assigned to his or her organizational unit. You activate this function initially in the *External print own organizational unit* system setting:

Name	Description
Activate External print own organizational unit	Choose whether only printing services in the document creator's own organizational unit are visible to him or her.

When creating or editing printing services, you can assign a printing service to specific organizational units or approve them for all organizational units.

The Type of Print Products that a Printing Service Is Allowed to Produce

You can permit only the production of specific print products for a printing service. A prerequisite here is that the template types are maintained in the custom structure W2P_TEMPLATE_TYPE (see *Descriptive Properties* on page 23). If the template designer assigns the *Poster* type to a template, the document creator can view only printing services that you have assigned with the production of posters.

Access to Print Data

When the order is sent, the printing service receives an e-mail with a link to the print files. The printing service can then download the file using the link.
The printing service may not be able to access the link destination. In this case, the system can be configured so that the print data is stored on an external server. If you have any questions, please contact your BrandMaker contact person.

Associated Tasks

- *Creating a Printing Service* below
- *Editing a Printing Service* on the facing page
- *Deleting a Printing Service* on the facing page

2.7.2.1.1 Creating a Printing Service

1. Choose *> Administration > Brand Template Builder > Printing Services*.
2. Choose *Create new Printing Service*.

   The required information fields are displayed.
3. Enter the name and e-mail address.
4. If configured, specify whether the print files are saved on an external server.
5. Enter the specifications for the visibility of printing services to document creators:

    1. Restrict the visibility to specific organizational units if necessary.
    2. Choose which print products the printing service is allowed to produce.
6. Use the checkboxes in the *Order Form* area to specify whether the *Additional delivery information*, *Desired delivery date* and *Order number and activity code* fields are displayed for this printing service.
7. Click *Save*.

You have created the printing service.

2.7.2.1.2 Editing a Printing Service

1. Choose *> Administration > Brand Template Builder > Printing Service*.
2. In the list of printing services, choose *Change* next to the printing service that you want to change.

   The required information fields are displayed.
3. Edit the fields.
4. Click *Save*.

You have edited the printing service.

2.7.2.1.3 Deleting a Printing Service

1. Choose *> Administration > Brand Template Builder > Printing Service*.
2. In the list of printing services, choose *Delete* next to the printing service that you want to change.

   If the printing service is already in use, a dialog box opens.
3. Select a replacement printing service to be used instead of the printing service to be deleted.
4. Choose *Delete*.

The printing service is deleted. Documents that previously used the deleted printing service now use the replacement printing service.

2.7.2.2 Configuring Order Number and Activity Code Validation

You can configure a validation check to ensure that a delivery number matches your company specifications when ordering printing. To do so, you change the *Order number and activity code validation* system setting under *> Administration > System Configuration > System Settings*:

Name	Description
Order number and activity code validation	Enter a regular expression to validate the order number and activity code in the step *Print Order* of the customizing wizard.

2.8 Assigning Authorizations

Assign the necessary rights to the user roles in the system. This chapter describes the rights for the Brand Template Builder module. You manage the roles for the module under *> Administration > Users & Groups > Rights & Roles*.

Accessing the Module

Each user that uses the Brand Template Builder module requires the following right.

Name	Description
MODULE_ACCESS	The user can see the module in the navigation bar.

Template Design and Document Creation

For the sake of clarity, the rights are described here separately based on template design and document creation. However, both rights in template design and rights for document creation can be assigned to a role if the tasks in your system require them. For more detailed information, see *Rights for Template Design* on the next page and *Rights for Customizing* on page 100.

Approvals

Name	Description
APPROVE_ADVERT_INSTANCES	The user can approve documents if the document is linked to a corresponding workflow (> *Brand Template Builder > Approvals > Documents*).
APPROVE_ADVERT_TEMPLATES	The user can approve templates if the template is linked to a corresponding workflow (> *Brand Template Builder > Approvals > Templates*).

Statistics

Name	Description
SEE_STATISTICS	The user can access Brand Template Builder statistics.

2.8.1 Rights for Template Design

Template designers require the basic rights described below at minimum. The basic rights provide minimal accessibility for templates, which can be increased with other rights. These rights are described in the section *Increasing the Accessibility of Templates*.

This section uses quantitative graphs to illustrate the logic for accessibility with rights. The colored markings show the accessibility: green stands for accessibility with basic rights, blue for accessibility with the described additional right. Please note that the diagrams are simplified and do not reflect the selection of templates that are available in your system.

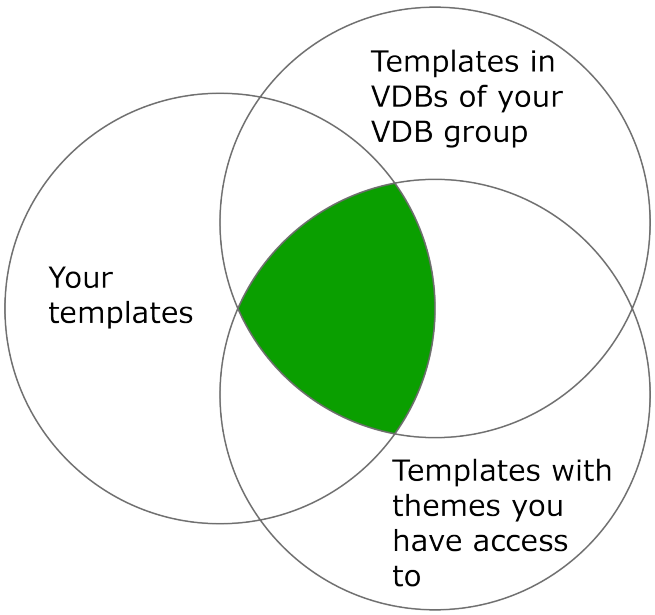
Basic Rights

In addition to MODULE_ACCESS, template designers require the following rights to create, access, and edit templates.

Name	Description
ACCESS_TEMPLATE_OPERATIONS	The user can open *> Brand Template Builder > Template Design*.
MANIPULATE_TEMPLATE	The user can create and edit INDD templates and download the files used for them.
CREATE_HTML_TEMPLATES	The user can also create HTML templates. Note: note that to create HTML templates, a user also requires CREATE_HTML_TEMPLATES in addition to ACCESS_TEMPLATE_OPERATIONS and MANIPULATE_TEMPLATE.

With these rights, the user can access templates when:

- The user is the owner of the template, see *Your Templates* in the image below.
- The template is stored in a VDB that is part of the VDB group to which the user is assigned.
- Categories that the user can access are assigned to the template.



EXAMPLE

A template designer creates a template. The template designer is therefore automatically the owner and assigns only categories and a VDB that he or she can access to the template. The template designer therefore initially has access to all the templates that he or she created.

This may change due to the following circumstances:

- Category assignment:
  - The ability of the template designer to access categories changes.
  - A different user (with access rights to the template; see the sections below) changes the category assignment for the template. This is possible only after the template is finalized.
- Assignment to a VDB:
  - The assignment of the template designer to the VDBs changes.
  - The template is moved to a VDB that the template designer cannot access by a different user. This is possible only after the template is finalized.
- Owner: after the template is finalized, it is revised by a different user who can access the template. The user therefore becomes the new owner.

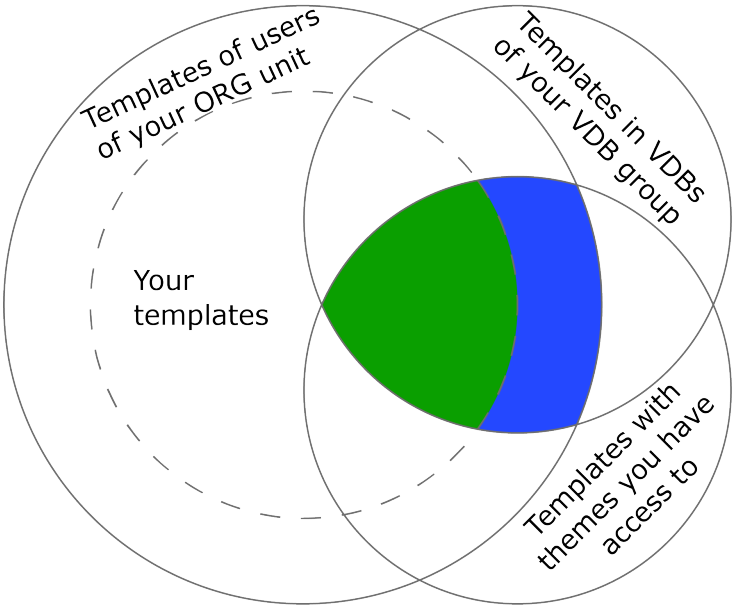
This visibility can be enhanced with other rights. See the sections below.

Increasing the Accessibility of Templates

Accessing Templates Made by Other Creators

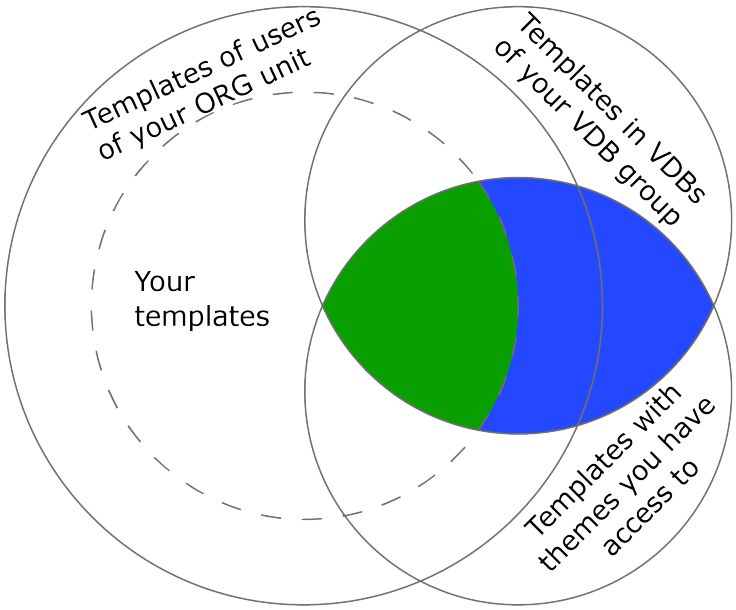
Within Your Own Organizational Unit

Name	Description
SEE_OWN_ORG	This right adapts the access restriction for the templates and documents of other owners in your organizational unit. Users with the basic rights and this right can access their own templates and the templates of all the owners in their organizational unit when: • The template is assigned to a VDB that the user can access. • Categories that the user can access are assigned to the template. Note: note that this right also affects the visibility of documents (see *Rights for Customizing* on page 100).



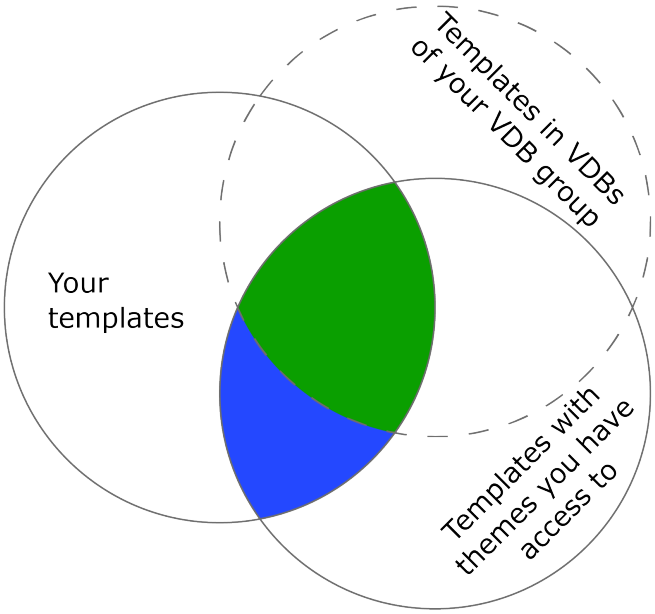
Independently of the Organizational Unit

Name	Description
SEE_OWN_ACG_ALL_ORG	This right overrides the owner access restriction in general. A user with the basic rights and this right can access the templates of all creators when: • The template is assigned to a VDB that the user can access. • Categories that the user can access are assigned to the template. Note: this right does not affect the access to documents.



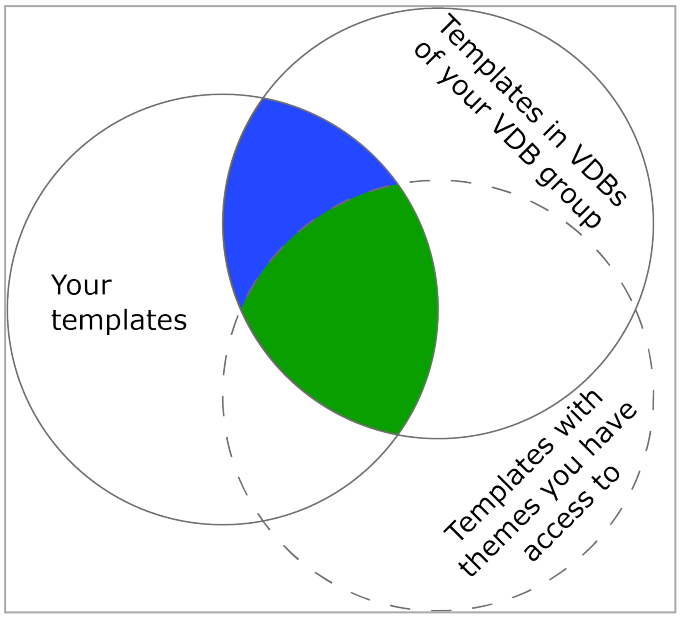
Accessing Templates in All VDBs

> **Note**
>
> To access the templates in all VDBs, the user requires the right VIEW_ALL_VDB. Note that the right is a right in the Media Pool module. For more information, see the Media Pool administration manual (see *Additional Documentation* on page 424).



Accessing Templates Regardless of the Category Assignment

Name	Description
SEE_ALL_MODULE_THEMES	This right overrides the access restriction to templates and documents by categories. A user with the basic rights and this right can access templates when: • The user is the creator of the template. • The template is assigned to a VDB that the user can access. Note: note that this right also affects the visibility of documents (see *Rights for Customizing* on page 100).



Access to All Templates

Name	Description
SEE_ANY_TEMPLATE	This right overrides all access restrictions. A user with the basic rights and this right can access all templates: Note: this right does not affect the access to documents.

Editing Template Properties

Name	Description
EDIT_OWN_ORG_TEMPLATES	The user can edit the metadata of Brand Template Builder templates of his or her own organizational unit.
EDIT_ALL_TEMPLATES	The user can edit the meta data of all templates.
IMPORT_INTO_ALL_VDBS	The user can assign a template to any VDB.

Creating and Managing Meta Templates

The right MANAGE_META_TEMPLATES can still be assigned in the interface. However, since the meta template function has been discontinued, the right is without function.

Revising Templates

Name	Description
ADMIN_REEDIT_TEMPLATES	The user can revise templates. Caution: if an error occurs while re-editing a template, then the documents based on the template may be damaged.

Deleting Templates

Name	Description
DELETE_TEMPLATES	The user can delete templates.

2.8.2 Rights for Customizing

Document creators require the basic rights described below at minimum.

Note

New documents are usually created based on templates. That means that a document creator needs to access both templates and documents. The basic rights provide minimal accessibility, which can be increased with other rights. These rights are described in the section *Increasing the Accessibility of Templates and Documents*.

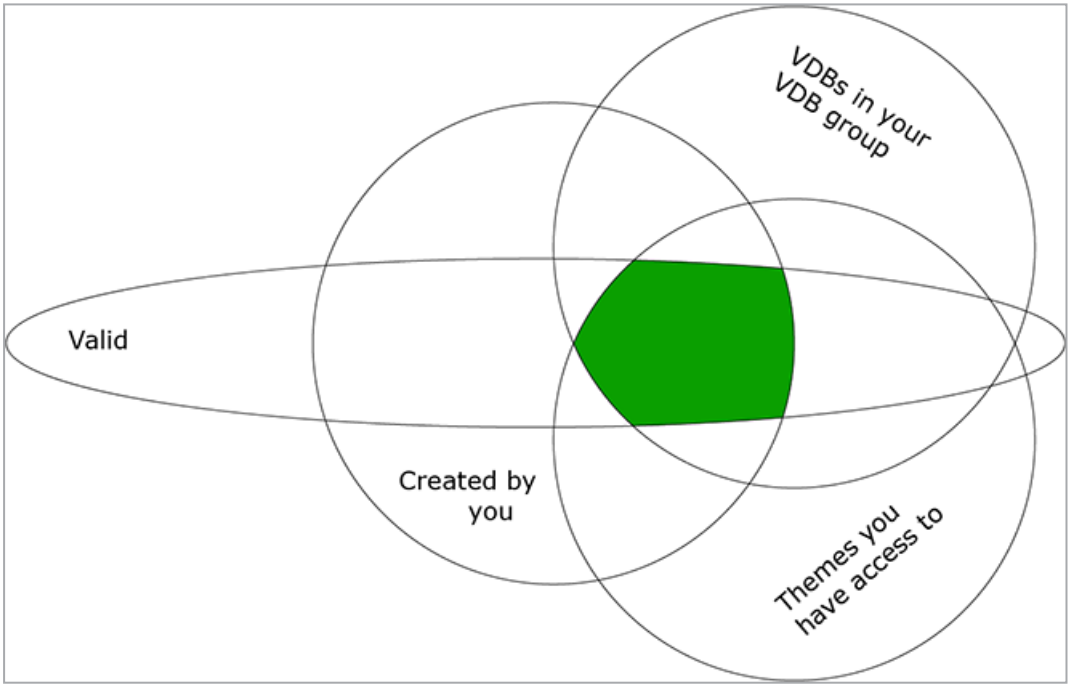
Please note that these rights do not always affect the accessibility of templates and documents to the same extent. You must therefore pay close attention to the descriptions of the rights and the listed notes.

This section uses quantitative graphs to illustrate the logic for accessibility with rights. The colored markings show the accessibility: green stands for accessibility with basic rights, blue for accessibility with the described additional right. Please note that the diagrams are simplified and do not reflect the selection of templates and documents that are available in your system.

Basic Rights

In addition to MODULE_ACCESS, the document creator requires the following rights:

Name	Description
ACCESS_INSTANCE_OPERATIONS	The user can search for templates and documents. With this right, the user can access templates and documents that meet all the following requirements: • The user has created the documents or templates himself or herself. Note: note that a user must have rights for Template Design in order to be the creator of a template. • The templates or document templates are stored in a VDB that is part of the VDB group to which the user is assigned. • Categories that the user can access are assigned to the templates or documents. • The templates or documents are valid.



Name	Description
MANIPULATE_INSTANCE	The user can create and edit new documents based on templates.

Name	Description
REUSE_INSTANCES	The user can copy finalized documents and modify the copy. The content of the finalized document and not the content of the underlying template is copied. Note: to copy documents, the user also requires MANIPULATE_INSTANCE.

EXAMPLE

A user creates a document. The user is therefore automatically the creator and assigns only categories and a VDB that he or she can access to the document. In addition, the user can define the validity of the document himself or herself. If the user sets the document as valid now, the user can first grant access to all the documents that he or she has created.

This may change due to the following circumstances:

- The ability of the document creator to access the categories changes, or a different user (with access rights to the document; see the sections below) changes the category assignment for the document.
- The assignment of the document creator to the VDBs changes, or the document template is moved by a different user to a VDB that the document creator cannot access.
- The validity of the document expires - or has not yet begun.

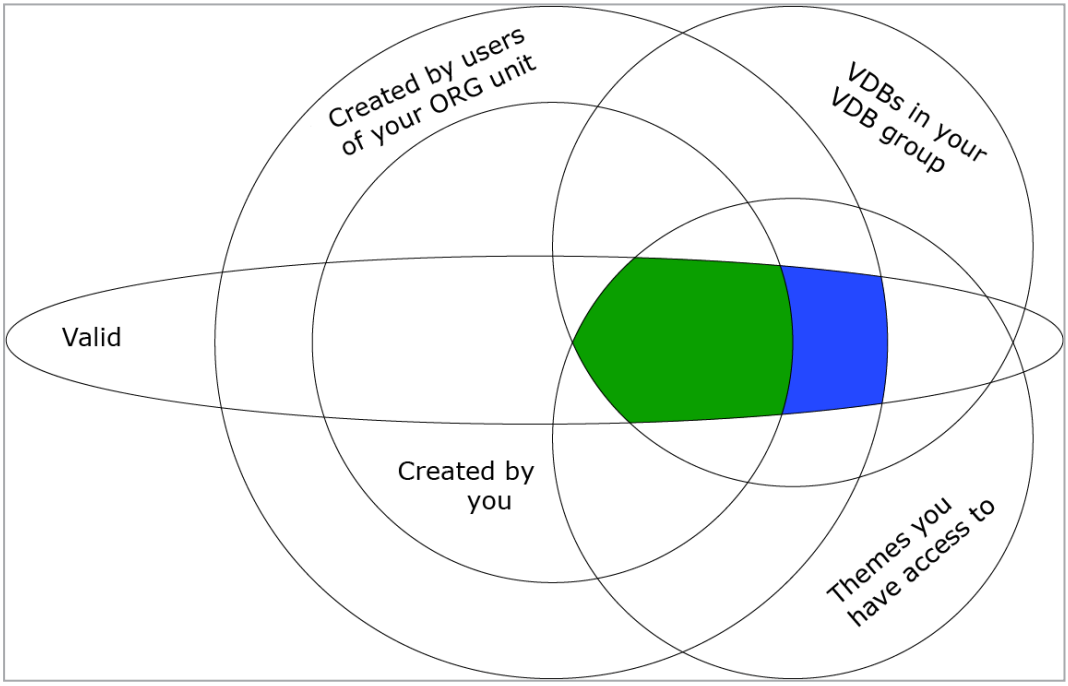
This accessibility can be enhanced with other rights. See the sections below.

Extending the Accessibility of Templates and Documents

Accessing Templates and Documents Made by Other Creators

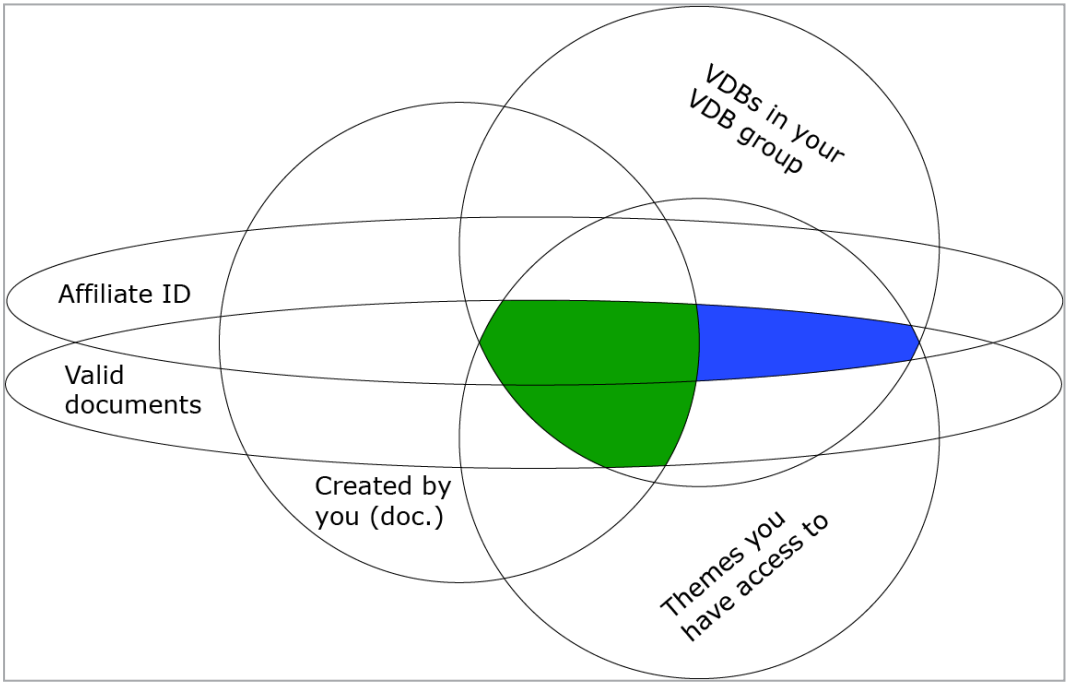
Within Your Organizational Unit

Name	Description
SEE_OWN_ORG	This right adapts the access restriction for other creators in your organizational unit. Users with the basic rights and this right can access their own documents and templates and the documents and templates of all the creators in their organizational unit when: • The corresponding templates are assigned to a VDB that the user can access. • Categories that the user can access are assigned to the templates and documents. • The documents and templates are valid. Note: note that this right affects Template Design (see *Rights for Template Design* on page 94).



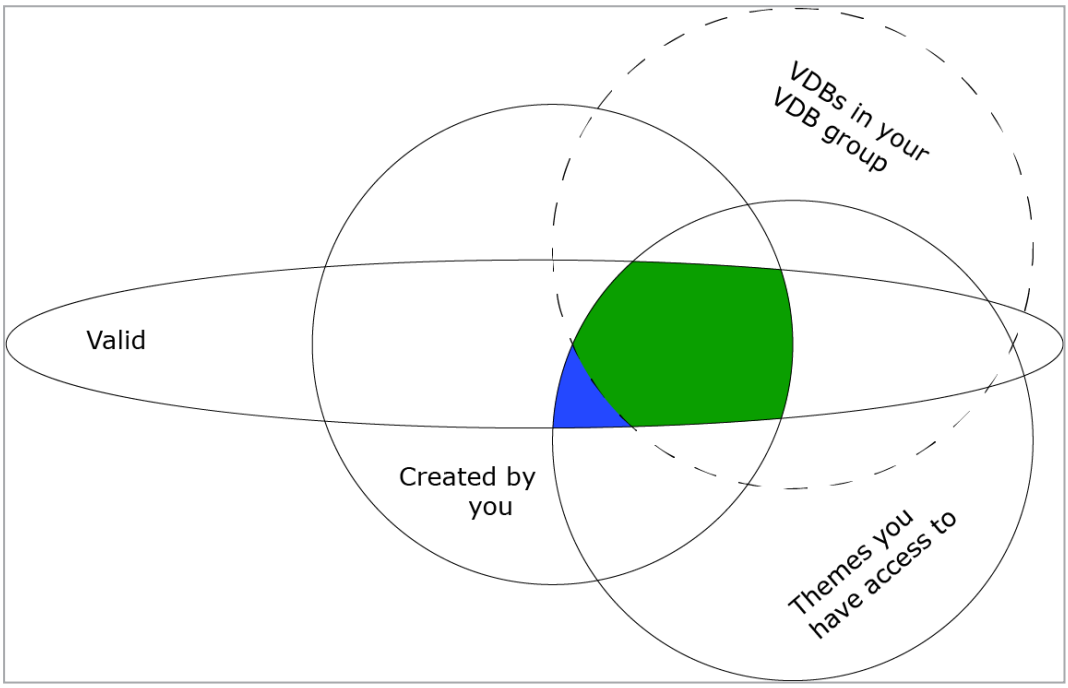
Creators from the Same Affiliate

Name	Description
SEE_OWN_AFFILIATE_ID	This right adapts the access restriction for documents with the same affiliate ID as other creators. A user with the basic rights and this right can access his or her own documents and the documents of all creators with the same affiliate ID when: • The corresponding templates are assigned to a VDB that the user can access. • Categories that the user can access are assigned to the documents. • The documents are valid. Note: this right does not affect the access to templates.



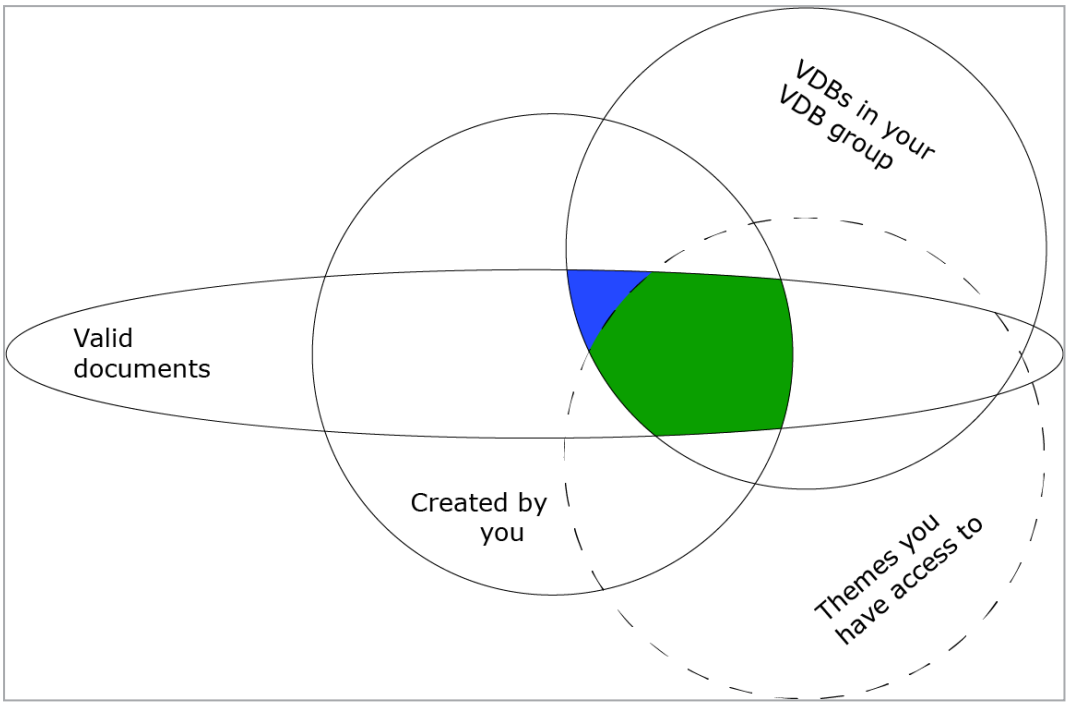
Accessing Templates and Documents in all VDBs

> **Note**
>
> To access the documents and their templates in all VDBs, the user requires the right VIEW_ALL_VDB. Note that the right is a right in the Media Pool module. For more information, see the Media Pool administration manual (see *Additional Documentation* on page 424).



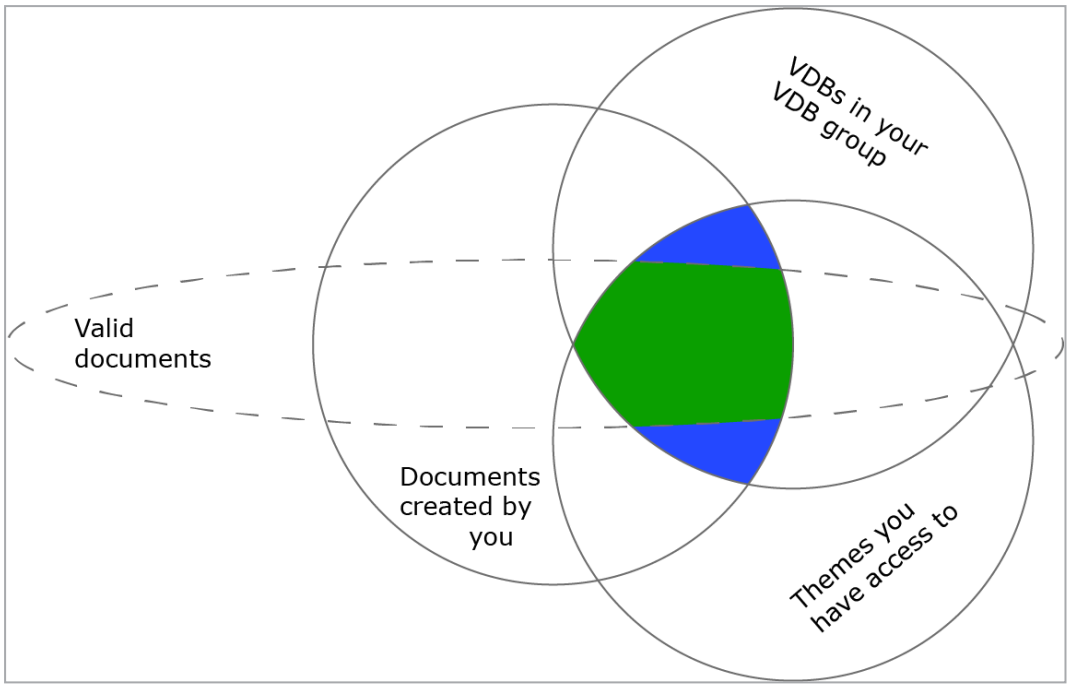
Accessing Templates and Documents Regardless of Their Category Assignment

Name	Description
SEE_ALL_MODULE_THEMES	This right overrides the access restriction by categories. A user with the basic rights and this right can access templates and documents when: • The user is the creator. • The corresponding templates are assigned to a VDB that the user can access. • The templates and documents are valid. Note: note that this right affects Template Design (see *Rights for Template Design* on page 94).



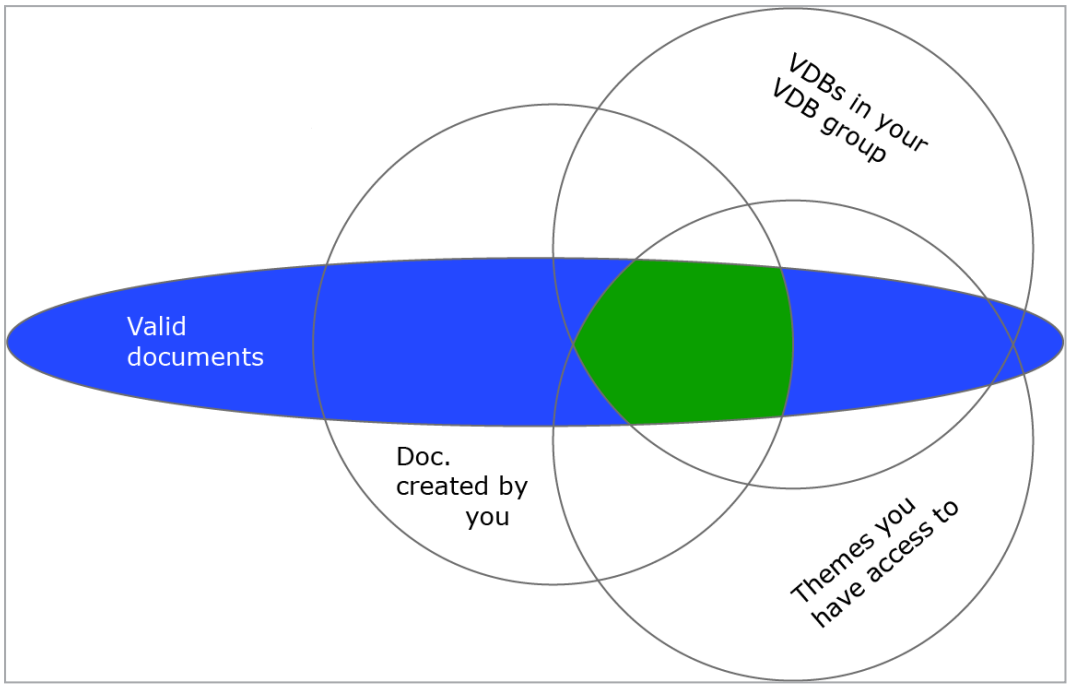
Accessing Documents Regardless of Their Validity

Name	Description
SEE_INVALID_INSTANCES	This right adapts the access restriction by validity. A user with the basic rights and this right can access valid and invalid documents when: • The user is the creator of the documents. • The corresponding templates are assigned to a VDB that the user can access. • Categories that the user can access are assigned to the documents. Note: this right does not affect the access to templates. See USE_INVALID_TEMPLATES.



Accessing All Valid Documents

Name	Description
SEE_ANY_INSTANCE	This right overrides the access restrictions by VDB affiliation, creator, and category assignment. A user with the basic rights and these rights can access all valid documents. Note: this right does not affect the access to templates. See USE_INVALID_TEMPLATES.



Accessing and Using Invalid Templates

Name	Description
USE_INVALID_TEMPLATES	This right adapts the access restriction by validity. A user with the basic rights and this right can access and use valid and invalid templates when: • The user is the creator of the templates. • The templates are assigned to a VDB that the user can access. • Categories that the user can access are assigned to the templates. Note: this right does not affect the access to documents. Refer to SEE_INVALID_INSTANCES and SEE_ANY_INSTANCE.

Name	Description
USE_ARCHIVED_TEMPLATES	This right extends the access restriction by archiving. A user with the basic rights and this right can use archived templates when: • The user is the creator of the templates. • The templates are assigned to a VDB to which the user has access. • Categories that the user can access are assigned to the templates. Note: This right has no effect on access to documents. Please note SEE_INVALID_INSTANCES or SEE_ANY_INSTANCE.

Functions during Customizing

In the Customizing Wizard

Name	Description
DOCUMENT_WIZARD_ DOWNLOAD_DOCUMENT	The user can download a Brand Template Builder document from the customizing wizard in its original format (INDD).
PUBLISH_FILES	The user can publish documents in the Media Pool.

In the Document Editor

Name	Description
CHANGE_INSTANCE_PRODUCT_ THEMES	Category filters for data objects can be defined for a template. With the right CHANGE_INSTANCE_PRODUCT_ THEMES, the user can choose from the assigned categories on the *Data objects* tab when customizing a document. In this way, the user can define the filter criteria for data objects.

Name	Description
REAL_TIME_PREVIEW	The user can use the real-time preview in documents for which it is activated. Note: the following conditions must be fulfilled so that the user can use the real-time preview: • The template creator has activated the real-time preview for the template in question. • The real-time preview must be enabled in your system.
CREATE_JOB_FROM_INSTANCE	The user can create a new job directly from the customizing wizard. Note: the Job Manager module must be activated and the user must have the authorization to create a job in the Job Manager.
UPLOAD_GOOGLE_MAPS	The user can search Google Maps for map material and insert map sections as images. The *Select a map from Google Maps* function can be used in the document editor.
UPLOAD_OWN_PICTURES	The user can upload locally saved images and use them in a Brand Template Builder document.

Managing Documents

Name	Description
SEE_MAIL_HISTORY	The user can see the e-mail history (documents sent by e-mail); that is, the e-mail text is displayed in the details view.
DELETE_INSTANCES	The user can delete customized documents.

Reusing Documents

Name	Description
REUSE_INVALID_INSTANCES	The user can reuse invalid documents from other users. To use invalid documents that are based on invalid templates, the right USE_INVALID_TEMPLATES is also required.

Meta Templates

The rights HANDLE_MANUAL_INSTANCE_REQUEST, GET_MANUAL_INSTANCE_REQUEST and META_TEMPLATE_ORDER_NEW_FORMAT can still be assigned in the interface. However, since the meta template function has been discontinued, the rights are without function.

2.9 Connecting External Functions via API

If you are using the API interface, you can configure your required settings in the system settings. You access the system settings under *> Administration > System Configuration > System Settings*. The relevant system settings are as follows:

Name	Description
API secret	Enter the API secret. The API secret protects the system from unauthorized access. Only API requests that contain the entered value are accepted and processed by the system.
User default	Only for applications using the mass personalization API: Enter the database ID of the default user. If no user session exists when calling an API method for creating a document, then this user is used.

3 Creating a Template File

In Brand Template Builder, you create a template based on either an INDD or HTML file. This chapter describes the issues to be noted when creating a file to ensure that Brand Template Builder can be used effectively:

- For an *INDD File* on the facing page
- For *Files for online templates* on page 124
- For an *HTML File* on page 152

3.1 INDD File

Note the following points when creating an INDD file as a template in Brand Template Builder. For the sake of clarity, they are divided into the sections Planning, Creation and then Reviews:

- *Design* below
- *Creation* on the next page
- *Review* on page 123

3.1.1 Design

Note the following when designing an INDD file. If necessary, consult your system or module administrator for details about your module configuration.

Design Only with Font Styles that Are Installed on the Rendering Server

A document can be displayed correctly only if the INDD file uses fonts that are installed on the rendering server. The installation should be based on your house fonts.

Design with Formats

In the INDD file, use paragraph, character, table, and cell styles to display custom text boxes or the texts used correctly. The styles in the INDD file must be created with a unique name in the system. You must know about the styles and their use.

Create the Swatches

Swatches are generally created and used to ensure that the right color values are always used for areas or text in an INDD file. You can use a script in Brand Template Builder to replace an assigned swatch (original color) with another swatch (target color) directly. The prerequisites for this are:

- The original and target color must be created as swatches in the InDesign file.
- The names of swatches must consist of one word and must not contain any blank spaces.

Create Object Styles for Effects such as Drop Shadow

If you are using special properties such as drop shadow or transparency, use object styles for them. An object style is transferred to an alternate image that is used. Do not use default object styles!

Design Single-Page Files for Templates of Smart Groups and Documents with Mass Customization

A Smart Group is an INDD template that is used in other templates. One example of a use case is a brochure with product data. The product data in the brochure is displayed by Smart Groups.
Mass customization is a serial letter function. It can be used, for example, to produce business cards.
A prerequisite for using both functions is that the created template file is a single-page template. Keep this in mind during the design phase.

Optimize the Rendering of Image Files

Note the following during the design phase: in Brand Template Builder, image files that are compressed as progressive JPEGs take mheeduch longer to render during customizing than image files that are compressed as Baseline JPEGs.

3.1.2 Creation

Note the following when creating the INDD file:

Use the created formats.

Also use character formats for lists and bulleted lists in the InDesign file. For example, do not use any direct formatting to create indents.

Note

Direct formatting entered in Brand Template Builder is included only if you (or the document creator) use the formatting *Bold*, *Italic*, *Underline*, *Superscript*, *Subscript*, or *Strikethrough* in an editor. Note that this may violate your CI guidelines.

Specify the Smart Group size correctly.

To use an InDesign file as a Smart Group, the aspect ratio of the Smart Group and Smart Grid must match. If you want to add a Smart Group to a static or dynamic Smart Grid, the following conditions apply:

- Static Smart Grid: the layout must be the same size ± 1 mm.
- Dynamic Smart Grid: the layout must fit fully into the grid when it is added in the top left corner.

Smart Groups are INDD templates that are used in other templates. One example of a use case is a brochure with product data. The product data in the brochure is supplied through Smart Groups.

If necessary, create the variables directly in the InDesign file.

Variables are required to replace text passages in a text box. One example of a use case is an address field in a brochure. The address has to be adapted for the affiliate that issues the brochure.

If you frame the variable text passages with #, they are automatically detected, marked, and created as variables. This makes it easier for you to create the template. However, you can also create variables when you create the template in Brand Template Builder.

Note

Note that variables must not contain hard or soft returns.

Delete control characters in the environment of variable texts.

You can mark text boxes in the INDD template as partly changeable and define individual text passages as variables, which can be adjusted during customizing. In the text passage environment that you want to create as changeable, avoid using control characters such as tabulators or line breaks.

Brand Template Builder inserts the variable text passages into the document similarly to the search and replace method. If a text variable follows a control character, the text that is added to the variable uses the control character settings instead of the variable settings. This can lead to undesirable results.

Disable the alignment to the baseline grid and automatic layout adjustment.

The baseline grid in an InDesign file has a fixed size. It is not scaled in Brand Template Builder, which means that the text is wrapped differently and the line spacing changes. Therefore, disable Align to baseline grid.

The positioning and size adjustment during scaling is done directly in Brand Template Builder. You should therefore disable the *Enable layout adjustment* option in the InDesign file to avoid unwanted results.

Set the contour guide.

In InDesign, you can insert an image frame in a text frame. If you want to flag the text frame as a custom text box in the INDD template, then do not add the image frame to the text frame. Instead, enable the text wrap function for the image and place the image over the text frame.

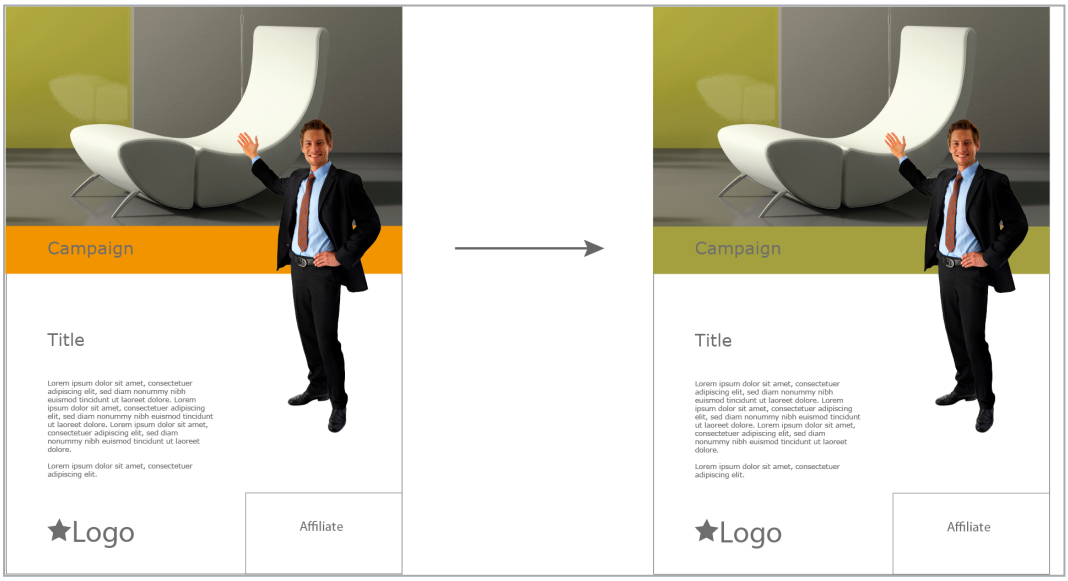
Always mark frames as text or image frames and name the frames.

Any text and image boxes that are to be defined as changeable boxes in the INDD template must be created as text or image boxes in InDesign. Frames that have not been assigned any content type in InDesign, cannot be configured in Brand Template Builder. To make it easier to assign the boxes in Brand Template Builder, provide the frames with descriptive names. These names are displayed in Brand Template Builder. If you do not provide a name, the frames are given a sequential number: Box 1, Box 2, and so on.

If you want to use boxes in the InDesign file that cannot be edited in Brand Template Builder, then set the content of the box as *unassigned*.

Create empty text boxes to control color variants.

You can create color variants using an INDD template. This means that the color of design elements (in the example below, the orange bars) that are assigned to a swatch can be changed by selecting a variant:



For more information, see *Variants* on page 238.

The following conditions apply when changing the color:

- Any number of colors can be changed for each variant, but the source and target colors must be clearly defined as color fields in the INDD file.
- In a variant, a source color can be changed to a target color only throughout the whole document. It cannot be replaced page by page or in different colors within the variant.

The colors are replaced using a script that is started in the INDD template. For this purpose, at least one text box, in which the command for executing the document is entered, must be available in the INDD template for each color change. The text boxes must meet the following requirements:

- The text boxes must be partly on one page of the INDD document but must also run beyond it.
- The color change is executed by a script. The text boxes must be large enough for the command for executing the script to be entered completely without any text extending onto the document page. The command that must be placed in the text boxes is:
  replace_color *<name of original color in the INDD file> <name of target color in the INDD file>* document.
  For example, you can "attach" the text boxes on the left page margin and make them large enough to fit the command with the longest field name.
- Optional: in each text box, enter the following text: #brandmaker_script.

To ensure that the document creator can check the color change before finalizing the document, all the pages must be refreshed. Note:

- If the document creator can access the *Refresh all pages* function, create a text box for each required color change on one page (for example, on the first page). The *Refresh all pages* function is available to the document creator in the document editor if you link a suitable editor preset to the template.
- If the document creator can only access the *Refresh (one) page* function, create a text box for each required color change on each page.

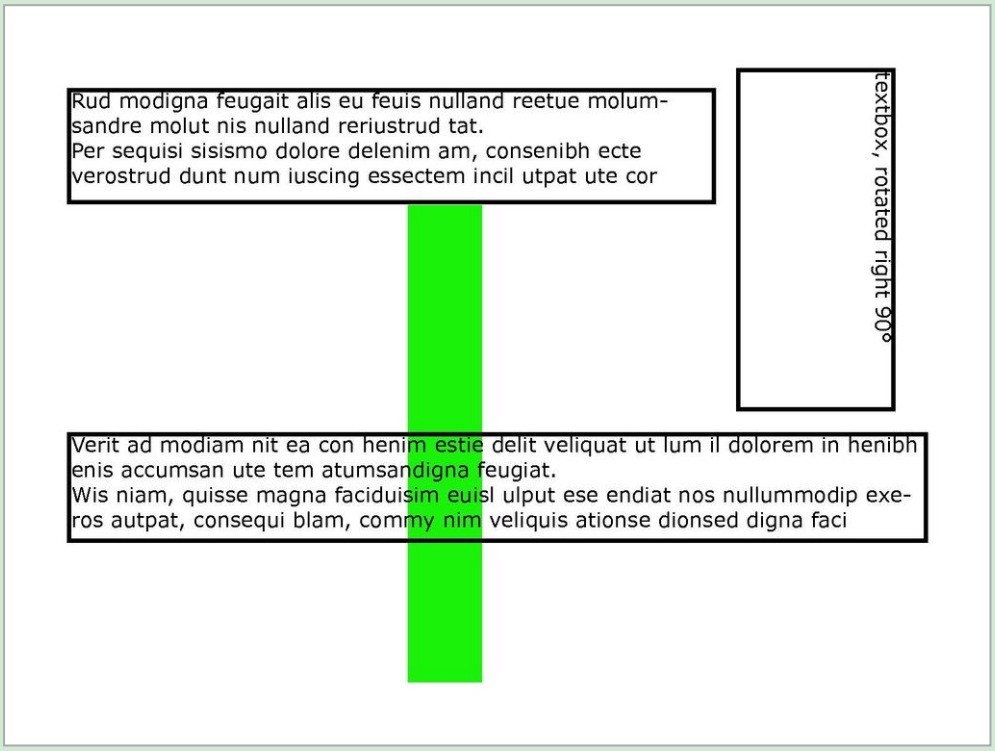
For information about creating the editor preset, see the section *Document Editor* on page 50. For information about linking the editor preset to the template, see *Customizing Process* on page 296.

Turn the content, but not the frame itself.

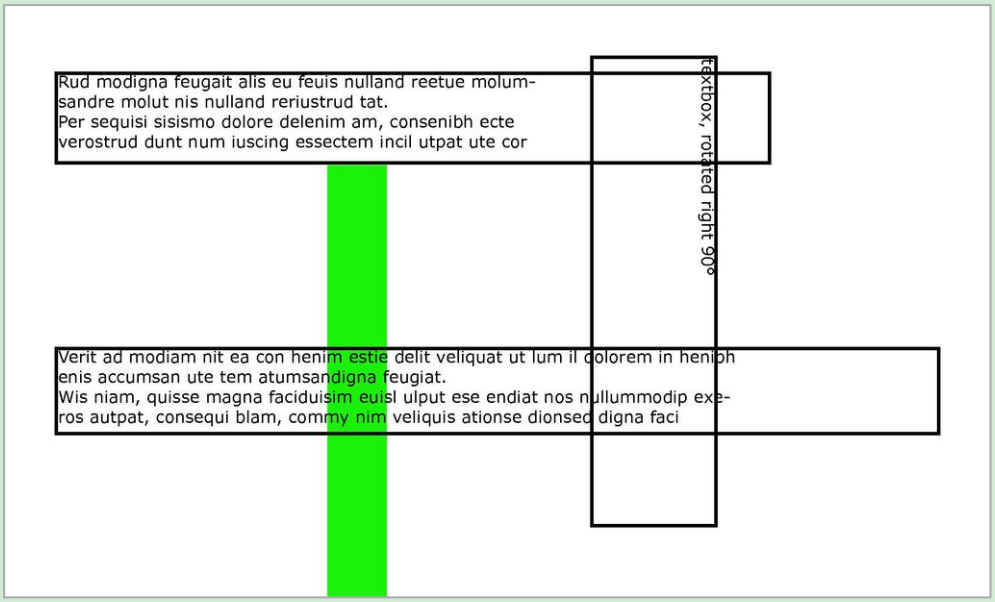
While configuring templates that must be scaled non-proportionally, you must pay special attention to the scaling options for rotated boxes. Depending on the setting or scaling, rotated boxes can expand in unwanted directions.

EXAMPLE

In the example shown below, the upper right text frame is turned 90° to the right.



For all boxes, it is specified that they expand horizontally when the document width increases. When the document width increases, the boxes must expand towards the right. However, since the internal orientation of boxes remains the same, the rotated text frame does not expand towards the right, but downwards:



You can avoid this effect by rotating the content of the frame and not the frame itself.

Note the positioning of the boxes.

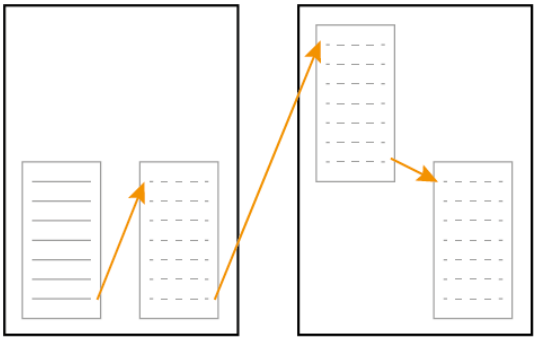
The Brand Template Builder document editor displays a box on the page containing the origin of the box. In InDesign, the origin of a box is not the upper left corner, rather the centre of the box. Therefore, if a box is placed on facing pages and the centre of the box is on the right page, in Brand Template Builder, the corresponding variable is displayed on the right page, rather than on the left page.

Create any required threading in the INDD file.

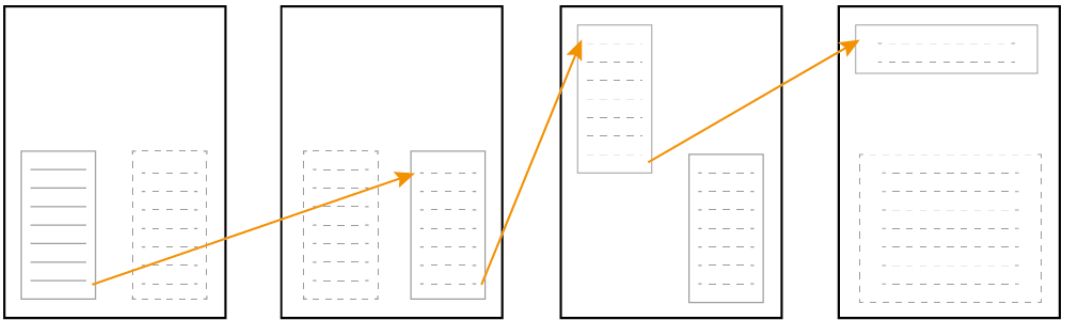
The text in a box can be independent of other boxes or can flow between boxes that are threaded with each other. To allow text to flow from box to box, you must thread the boxes. You can thread the text frames in the INDD file, or there are some options to add threads in the template.

> Attention!
>
> Design the template so that each box is threaded a maximum of one time, either in the INDD file or in Template Design. Multiple use is not possible. See also Creation.

If you define threading in the INDD file, you can configure a text flow according to the InDesign logic. The text flow is mapped and used in the template in Brand Template Builder. You edit the start box and define the variable text passage and other settings for the overall text flow here.



If you set up threading in Template Design, you can thread only from one box to a box on the subsequent page:



In addition, the start box must be a fully changeable text box. This function is therefore suitable for specific use cases. For more information about these cases, see *Threaded Text Boxes* on page 219. However, if you want to configure a text flow across multiple boxes on one page, you should thread the boxes beforehand in the INDD file.

Add all the CI styles to one basic document.

Basic templates are used to integrate other InDesign files (Smart Pages and Smart Grids) during customizing. To display all of the styles correctly, the basic template must also contain the styles that the Smart Pages or Smart Grids use. You should therefore create the basic templates using all of the styles.

3.1.3 Review

Before the final save, check the following issues:

Checking the Layer Settings in the Document

Layer settings such as invisible layers are retained when using the InDesign file as an INDD template, but they cannot be edited. Therefore, you must check the layer settings.

Deleting Unused Sample Pages from the InDesign File

To use an InDesign file as an INDD template, you must ensure that only sample pages that are used in the document pages are present in the InDesign document. Note that the job options function *Remove empty pages* has no effect on master pages (see *Job Options as Output Methods* on page 86).

Note

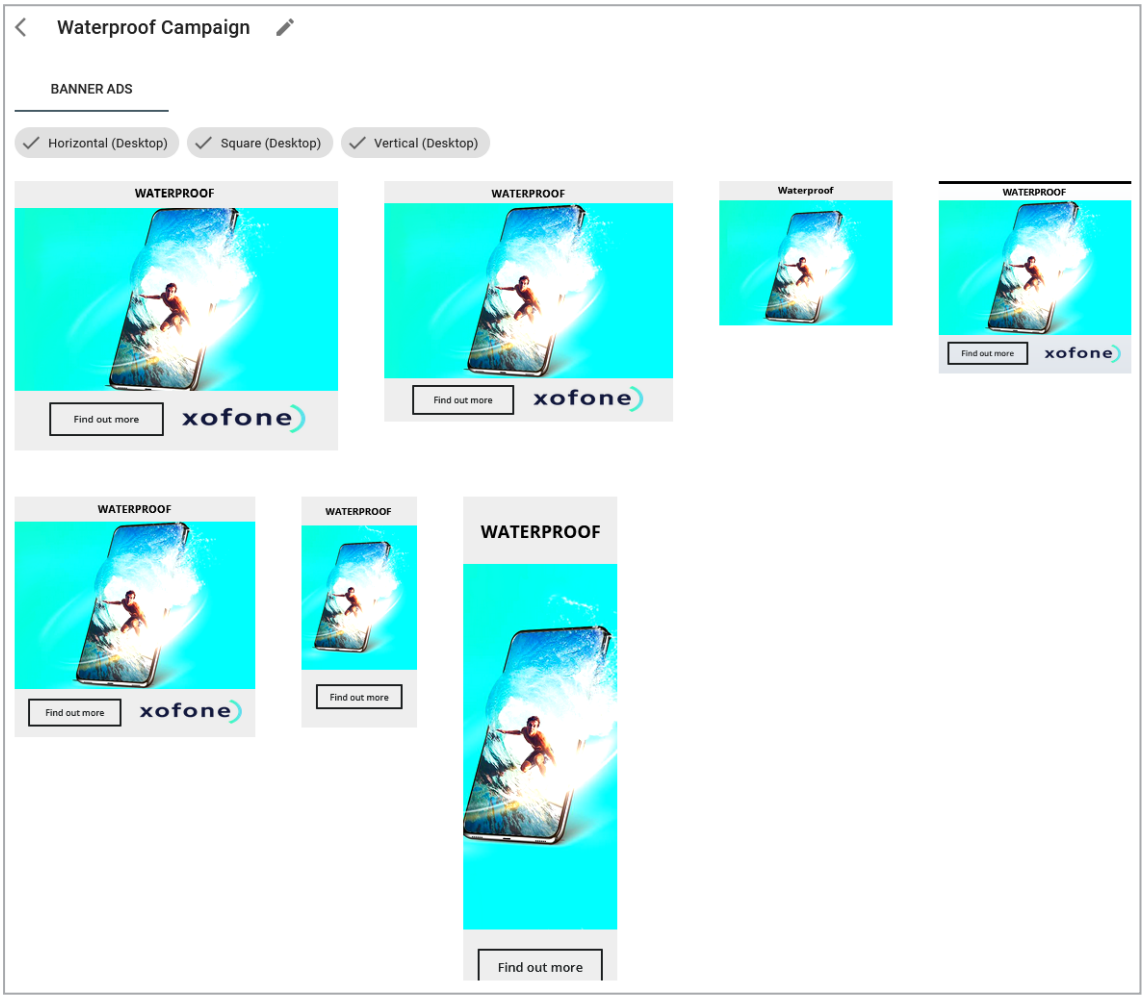
Image and text frames that are assigned to a sample template in InDesign cannot be changed in Brand Template Builder! If you want these image and text frames to be changeable in Brand Template Builder, remove the frames with the key combination CTRL+SHIFT+click.

3.2 Files for online templates

This chapter describes the files you need to assemble for an online template.

WATERPROOF example

For better clarity, the WATERPROOF example is used. The WATERPROOF example consists of seven banner ads for a fictitious campaign.



The document creator should be able to edit the following content:

- Title (in screenshot *WATERPROOF*)
- Button text (in screenshot *Find out more*)
- If necessary, it should be possible to insert the product name.

It should be emphasized that not all ads have all elements. The files are output as PNG files.

Note that this example illustrates the JSON structure for an online template, not for a container.

Files of an online template

Online templates consist of configuration files in JSON format and usually several source directories.

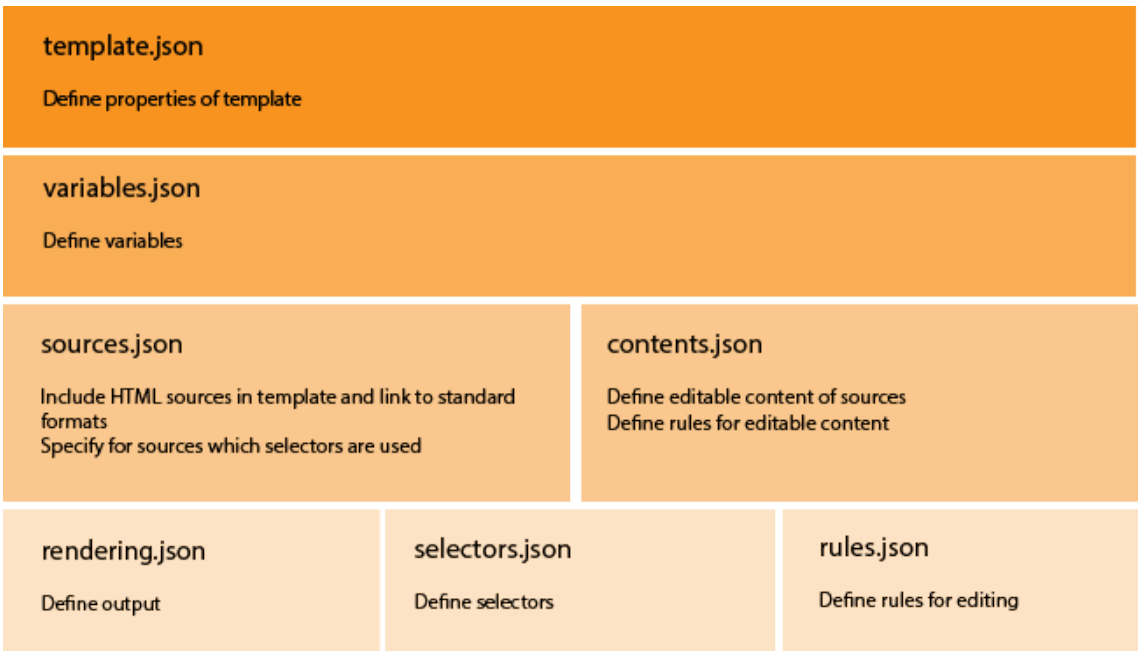
Each source directory contains the files needed to render a banner ad in HTML, for example, an HTML file as the entry point, image and other media files if necessary, and CSS files.

To create the online template in Brand Template Builder, the directory is zipped. Note that you do not zip the source directories and the configuration files, but the parent directory, otherwise the ZIP file will not be recognized as an online template.

Configuration files

For the configuration of an online template you need the following JSON files:

- In the *template.json* on page 128 file, you set the properties of the template.
- You define the variables that the document creator sees when editing the banner ads in the *variables.json* on page 131 file.
- You use the *sources.json* on page 133 file to include the source directories in the template. For each source, you specify the output, that is, the format that the document creator can create from it. With selectors you define which contents of the source can be edited.
- You use the *contents.json* on page 138 file to define the editable contents in the source files and the rules for editing.
- You set the parameters for the output of the document in the *rendering.json* on page 141 file.
- In the *selectors.json* on page 145 file, you define the selectors. With selectors, you reference the places in your sources that can be edited by the document creator.
- You define rules for the input of content and its final rendering through the *rules.json* on page 148 file.



Technical context of containers and online templates

Both containers and online templates consist of one or more source directories and a set of JSON files. The source directories contain the HTML code needed for rendering.

You use the JSON files to configure how files in the source directories are related. The following table compares the JSON files that must be created for an online template and a container, and indicates where you can find a description of the JSON structure:

JSON-Datei	Container	Online template	Description
container.json	Yes	—	*container.json* on the facing page
template.json	—	Yes	*template.json* on page 128
variables.json	—	Yes	*variables.json* on page 131
sources.json	Yes	Yes	*sources.json* on page 133
contents.json	Yes	Yes	*contents.json* on page 138
rendering.json	—	Yes	*rendering.json* on page 141
selectors.json	Yes	Yes	*selectors.json* on page 145
rules.json	Yes	Yes	*rules.json* on page 148

3.2.1 container.json

The *container.json* above file defines the content surrounding the online template.

Example

```
[
        {
                "uniqueName": "FacebookFeedImagePost",
                "displayName": {
                        "en-US": "Facebook Feed Image Post"
                },
                "sources": [
                        "FacebookFeedImagePost"
                ]
        },
        {
                "uniqueName": "FacebookFeedImageAd",
                "displayName": {
                        "en-US": "Facebook Feed Image Ad"
                },
                "sources": [
                        "FacebookFeedImageAd"
                ]
        }
]
```

JSON structure

The file is structured as an array of the following objects:

Parameter	Description
uniqueName	Enter the unique name of the source. **unique identifier, mandatory**
displayName	Enter the name of the source that will be displayed in the interface. If necessary, enter a name for each interface language used. **Multi-lingual text, at least one language mandatory**
sources	Specify the name of the source directory. **Array of unique sources identifiers, mandatory**

3.2.2 template.json

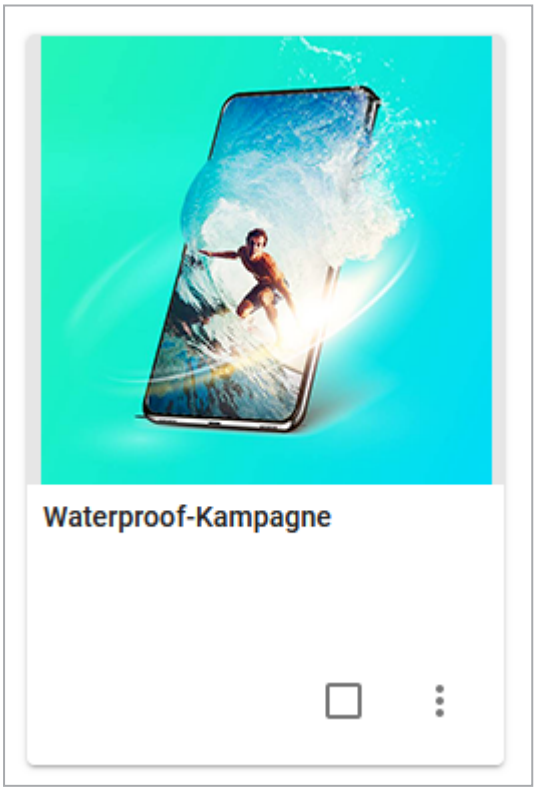
In the *template.json* above file, you set the properties of the template.

WATERPROOF

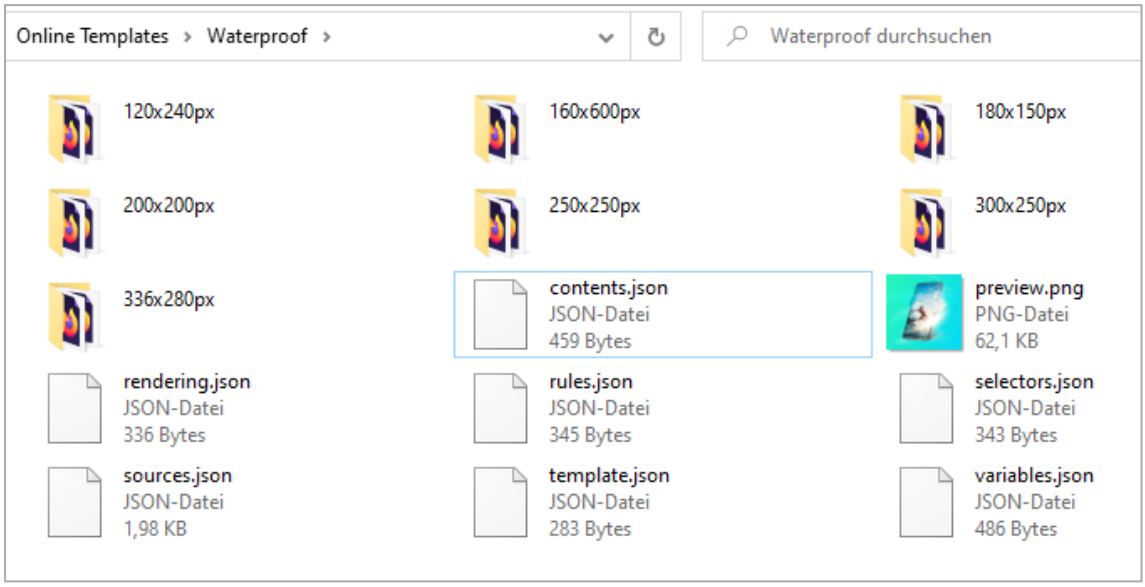
The following code shows the template.json file for the WATERPROOF example:

```
{
        "displayName": {
                "en-US": "Waterproof Campaign",
                "de-DE": "Waterproof-Kampagne"
        },
        "previewImage": "preview.png",
        "vdbUniqueName": "Allgemein verfügbare Daten",
        "customProperties": [
                {
                        "property": "AdType",
                        "value": "Product"
                }
        ]
}
```

This code is displayed as follows (selected interface language is German):



The preview is the graphic stored as preview.png in the same directory as the JSON files:



In the system, the template is stored in the VDB *Generally Available Data*.

In the custom properties, the template for the *AdType* property is assigned the value *Product*.

A description and tags are not used.

JSON structure

Parameter	Description
displayName	Enter the name with which the template will be displayed in the system. **Multi-lingual text, at least one language mandatory**
description	Enter a brief and informative description. **Multi-lingual text, optional**
previewImage	Enter the name of the image file from the template to be used as a preview image in the system. **Filename of preview image, preferred size: 225 x 225 px, mandatory**
vdbUniqueName	Enter the name of the VDB in which the template should be saved. The name of a VDB is entered multilingual, it is enough to enter the exact name of a language **Name of VDB, mandatory**

Parameter	Description
tags	Tag specification **Array of tags, optional**
customProperties	Specifying custom properties Note the *property* and *value* parameters below. **Array of objects, optional**
property	Name of the custom property **Unique identifier, mandatory**
value	Value of the custom property **Unique identifier, mandatory**

Example

```
{
        "displayName": {
                "en-US": "Inspiration",
                "de-DE": "Inspirationen"
        },
        "description": {
                "en-US": "English description",
                "de-DE": "Deutsche Beschreibung"
        },
        "previewImage": "preview.png",
        "vdbUniqueName": "Allgemein"
        "tags": [
                "Family",
                "Memories",
                "Recipe",
                "Inspiration",
                "Familie",
                "Erinnerungen",
                "Rezept",
                "Inspiration"
        ],
        "customProperties": [
                {
                        "property": "campaign",
                        "value": "recipe_inspiration"
                }
        ]
```

```
}
```

3.2.3 variables.json

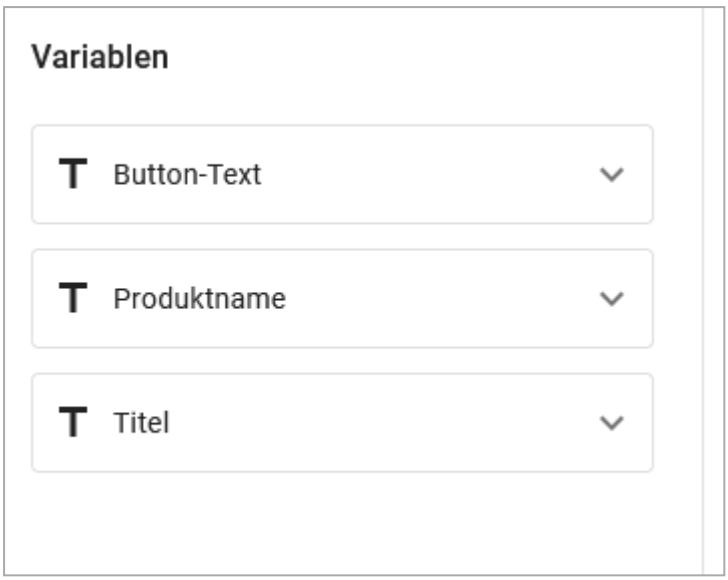
You define the variables that the document creator sees when editing the banner ads in the *variables.json* above file.

WATERPROOF

The following code shows the variables.json file for the WATERPROOF example:

```
[
          {
                  "uniqueName": "header_text_variable",
                  "displayName": {
                          "en-US": "Header Text",
                          "de-DE": "Titel"
                  },
                  "contents": ["header_text_content"]
          },
          {
                  "uniqueName": "product_name_variable",
                  "displayName": {
                          "en-US": "Product Name",
                          "de-DE": "Produktname"
                  },
                  "contents": ["product_name_content"]
          },
          {
                  "uniqueName": "button_text_variable",
                  "displayName": {
                          "en-US": "Button Text",
                          "de-DE": "Button-Text"
                  },
                  "contents": ["button_text_content"]
          }
]
```

This code is represented in the template with the following variables (German set as the interface language):



Which contents in the source files are affected by the variables and which rules apply to the input are defined in contents.json..

JSON structure

The file is structured as an array of the following objects:

Parameter	Description
uniqueName	Enter the unique name of the source. **Unique identifier, mandatory**
displayName	Enter a display name for each required language. **Multi-lingual text, at least one language mandatory**
contents	Specify the unique names of the contents from contents.json that apply to the variable. **Array of unique content identifiers, at least one content or container content is mandatory**
containerContents	Specify the unique names of the contents from contents.json that apply to the variable. **Array of unique content identifiers, at least one content or container content is mandatory**

Example

```
[
        {
                "uniqueName": "RecipeName",
```

```
                "displayName": {
                        "en-US": "Recipe Name"
                },
                "contents": [
                        "RecipeName"
                ]
        },
        {
                "uniqueName": "PromotionalText",
                "displayName": {
                        "en-US": "Promotional Text"
                },
                "containerContents": [
                        "FacebookPrimaryText"
                ]
        },
        {
                "uniqueName": "BackgroundImage",
                "displayName": {
                        "en-US": "Background Image"
                },
                "contents": [
                        "BackgroundImage"
                ]
        }
]
```

3.2.4 sources.json

You use the *sources.json* above file to include the source directories in the template. For each source, you specify the output, that is, the format that the document creator can create from it. With selectors you define which contents of the source can be edited.

WATERPROOF

The following code shows the sources.json file for the WATERPROOF example. Note that this example illustrates the JSON structure for an online template, not for a container.

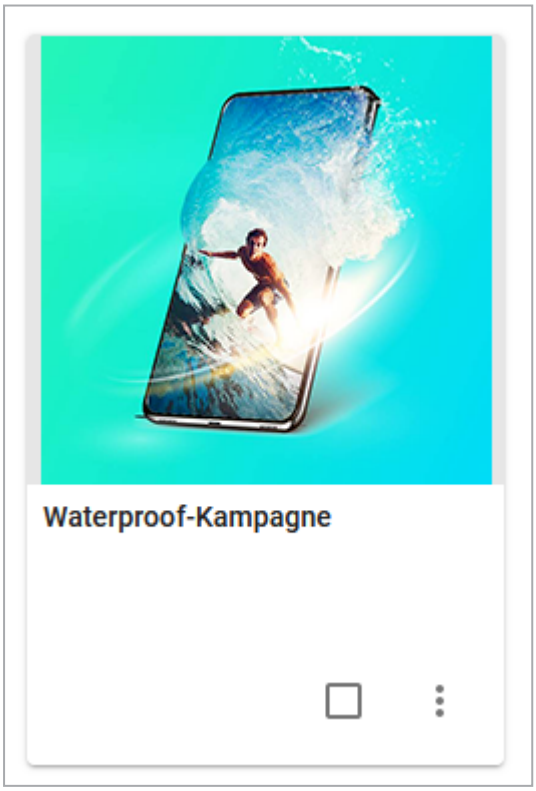
```
[
        {
                "folder": "120x240px",
                "entryPoint": "index.html",
```

```
            "displayName": {
                    "en-US": "120 x 240 px",
                    "de-DE": "120 x 240 px"
            },
            "formats": [
                   "Banner_Small_Skyscraper_120_240"
            ],
            "selectors": [
                    "header_text_selector",
                    "button_text_selector"
            ]
    },
    {
            "folder": "160x600px",
            "entryPoint": "index.html",
            "displayName": {
                    "en-US": "160 x 600 px",
                    "de-DE": "160 x 600 px"
            },
            "formats": [
                    "Banner_Wide_Skyscraper_160_600"
            ],
            "selectors": [
                    "header_text_selector",
                    "product_name_selector",
                    "button_text_selector"
            ]
    },
    {
            "folder": "180x150px",
            "entryPoint": "index.html",
            "displayName": {
                    "en-US": "180 x 150 px",
                    "de-DE": "180 x 150 px"
            },
            "formats": [
                    "Banner_Small_Rectangle_180_150"
            ],
            "selectors": [
                    "header_text_selector"
            ]
    },
    {
```

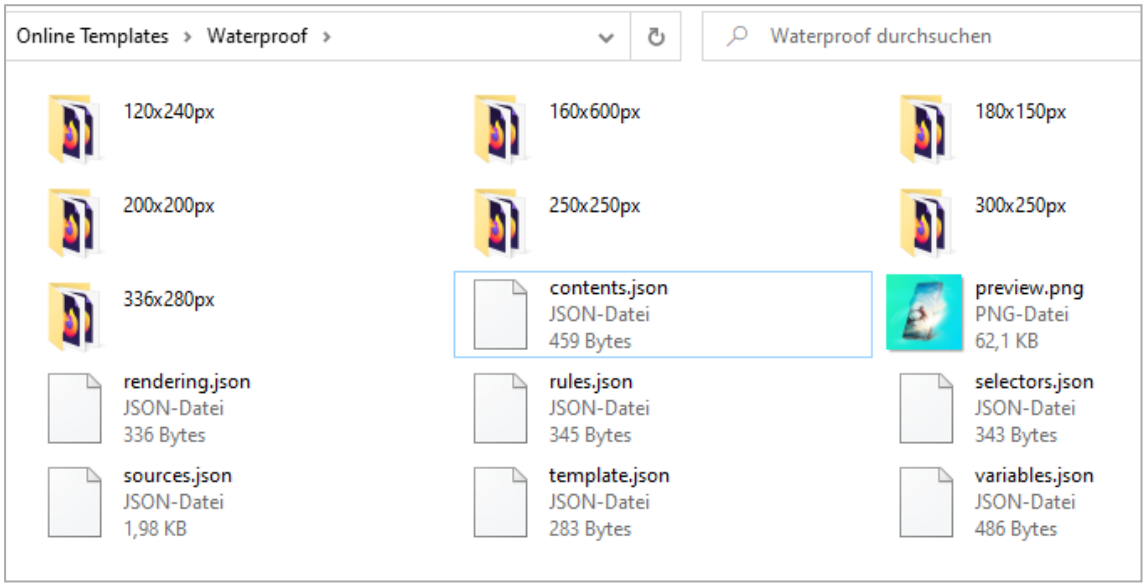
```
                "folder": "200x200px",
                "entryPoint": "index.html",
                "displayName": {
                        "en-US": "200 x 200 px",
                        "de-DE": "200 x 200 px"
                },
                "formats": [
                        "Banner_Small_Square_200_200"
                ],
                "selectors": [
                        "header_text_selector",
                        "product_name_selector",
                        "button_text_selector"
                ]
        },
        {
                "folder": "250x250px",
                "entryPoint": "index.html",
                "displayName": {
                        "en-US": "250 x 250 px",
                        "de-DE": "250 x 250 px"
                },
                "formats": [
                        "Banner_Square_250_250"
                ],
                "selectors": [
                        "header_text_selector",
                        "product_name_selector",
                        "button_text_selector"
                ]
        },
        {
                "folder": "300x250px",
                "entryPoint": "index.html",
                "displayName": {
                        "en-US": "300 x 250 px",
                        "de-DE": "300 x 250 px"
                },
                "formats": [
                        "Banner_Medium_Rectangle_300_250"
                ],
                "selectors": [
                        "header_text_selector",
```

```
                        "product_name_selector",
                        "button_text_selector"
                ]
        },
        {
                "folder": "336x280px",
                "entryPoint": "index.html",
                "displayName": {
                        "en-US": "336 x 280 px",
                        "de-DE": "336 x 280 px"
                },
                "formats": [
                        "Banner_Large_Rectangle_336_280"
                ],
                "selectors": [
                        "header_text_selector",
                        "product_name_selector",
                        "button_text_selector"
                ]
        }
]
```

This sources.json file includes seven source directories (*folder* parameter), which are created at the same level as the JSON files:



Note that additional source directories may be created. However, if directories are not included in the sources.json, they will not be displayed in the template.
Each source directory has an index.html as the entry point. The dimensions are specified as display names. The *formats* parameter specifies which standard format the display corresponds to.
The *selectors* parameter is used to assign which variables apply to the respective source.



When editing, all variables created in selectors.json are displayed, but as you can see in the screenshot below, the smallest template (180 x 150 px) has only a title, but neither a button nor can a product name be inserted. In the selectors parameter in the sources.json this is specified like this:

```
"selectors": [
        "header_text_selector"
]
```

JSON structure

The file is structured as an array of the following objects:

Parameter	Description
folder	Enter the name of the directory where the source files are stored. **Plain text, mandatory**
entryPoint	Enter the name of the file in the source directory that is the entry point for rendering in HTML. **Plain text, optional, "index.html" is default**

Parameter	Description
displayName	Enter a display name for each required language. **Multi-lingual text, at least one language mandatory, container only**
formats	Enter the technical names of the formats that will apply to this template. The formats are created in format groups under *> Administration > Brand Template Builder > Standard Formats*. For more information, see chapter *Standard Formats* on page 24. **Array of unique format identifiers, mandatory**
selectors	Enter the unique names of the selectors you created in selectors.json that apply to this source, see *selectors.json* on page 145. **Array of unique selector identifiers, mandatory**

Example

```
[
        {
                "folder": "Generic",
                "entryPoint": "recipe_inspiration.html",
                "formats": [
                        "Banner_Wide_Skyscraper_160_600",
                        "Banner_Half_Skyscraper_160_600",
                        "Banner_Medium_Rectangle_300_250",
                        "Banner_Leaderboard_728_90",
                        "Banner_Billboard_970_250",
                        "Facebook_Feed_Image_Post",
                        "Instagram_Feed_Image_Post",
                        "Twitter_Tweet"
                ],
                "selectors": [
                        "RecipeName",
                        "BackgroundImage"
                ]
        }
]
```

3.2.5 contents.json

You use the *contents.json* above file to define the editable contents in the source files and the rules for editing.

Contents.json is used to define interchangeable contents. A content refers to one or more selectors that bind the content to its explicit appearance(s) within the template. In addition, a content can also reference rules.

In the interaction between container and online template, a specific content of a container defines where the online template is rendered. On this basis it is also defined whether a template is a container template or an online template: only container templates contain content that represents an online template.

Note

Content in container templates must have unique names system-wide.

WATERPROOF

The following code shows the contents.json file for the WATERPROOF example. Note that this example illustrates the JSON structure for an online template, not for a container:

```
[
        {
                "uniqueName": "header_text_content",
                "type": "text",
                "selectors": [
                        "header_text_selector"
                ],
                "rules": [
                        "header_text_rule"
                ]
        },
        {
                "uniqueName": "product_name_content",
                "type": "text",
                "selectors": [
                        "product_name_selector"
                ],
                "rules": [
                        "product_name_rule"
                ]
        },
        {
                "uniqueName": "button_text_content",
                "type": "text",
                "selectors": [
                        "button_text_selector"
```

```
                ],
                "rules": [
                        "button_text_rule"
                ]
        }
]
```

This contents.json file defines three contents, one for the title, the product name and one for the button text. The aforementioned selector is used to define the respective content of the source files. In addition, a rule for the display or input of the content is defined.

JSON structure

The file is structured as an array of the following objects:

Parameter	Description
uniqueName	Enter the unique name of the source. **Unique identifier, mandatory, system wide unique at contents of container templates**
type	Specify the type of content. **"text", "asset" or "container", mandatory**
selectors	Specify the selectors that apply to this content. Note *selectors.json* on page 145. **Array of unique selector identifiers, mandatory**
rules	Specify the rules that apply to this content. Note *rules.json* on page 148. **array of unique rule identifiers, optional**

Example

```
[
        {
                "uniqueName": "FacebookPrimaryText",
                "type": "text",
                "selectors": [
                        "FacebookPrimaryText"
                ],
                "rules": [
                        "FacebookLongText"
                ]
        },
```

```
        {
                "uniqueName": "FacebookDescription",
                "type": "text",
                "selectors": [
                        "FacebookDescription"
                ],
                "rules": [
                        "FacebookLongText"
                ]
        },
        {
                "uniqueName": "FacebookHeadline",
                "type": "text",
                "selectors": [
                        "FacebookHeadline"
                ],
                "rules": [
                        "FacebookText255"
                ]
        },
        {
                "uniqueName": "FacebookImageContainer",
                "type": "container",
                "selectors": [
                        "Container"
                ],
                "rules": [
                        "FacebookImage"
                ]
        }
]
```

3.2.6 rendering.json

You set the parameters for the output of the document in the *rendering.json* above file.

WATERPROOF

The following code shows the rendering.json file for the WATERPROOF example:

```
[
        {
                "formats": [
```

```
                        "Banner_Small_Skyscraper_120_240",
                        "Banner_Wide_Skyscraper_160_600",
                        "Banner_Small_Rectangle_180_150",
                        "Banner_Small_Square_200_200",
                        "Banner_Square_250_250",
                        "Banner_Medium_Rectangle_300_250",
                        "Banner_Large_Rectangle_336_280"
                ],
                "renderingParameters": {
                        "mimeType": "image/png"
                }
        }
]
```

In this example, all formats specified in sources.json are output as an image file in PNG format. No other parameters are specified, so please refer to the rendering rules described below.

Rules for determining width and height

For rendering, size information from multiple sources is considered in the following prioritization:

1. The highest priority is given to the width and height specified by the standard format. If these specifications are present, all of the specifications described below are ignored. Note for more information *Standard Formats* on page 24.
2. Second priority is given to rules in rules.json - if width and height specifications are included. If defined, these rules must be fulfilled together with the rules from rendering.json; note the point below.
3. Third priority is given to the rendering configuration in rendering.json - if width and height specifications are included. If there are conflicts with the specifications from the rules.json file, the resolution is increased / decreased to comply with the rules. If possible, a given aspect ratio should be respected.
4. If the above rules do not clearly specify the values for width and height, the size of the largest (by number of pixels; width * height) still valid resolution is used. A given aspect ratio should be kept.
    - If only a maximum width or height is specified, but no explicit value, the maximum value is used.
    - If only a minimum width or height is specified, but no explicit value, the minimum value is used.

5. In case neither the format nor the rules nor the rendering configuration can determine a well-defined target resolution, 480 x 480 pixels (480p square) is used as the fallback resolution. The same applies in case of unresolvable conflicts.If no width or height is specified, but an aspect ratio is, 480 is used as the smaller value for the width or height.
    - If both a minimum and maximum aspect ratio are specified, the average of min and max is used as the aspect ratio.
    - If only a minimum or maximum aspect ratio is specified, this value is used as the aspect ratio.

JSON structure

The file is structured as an array of the following objects:

Parameter	Description
formats	Enter the technical names of the formats you want to use for the template. **Array of format identifiers, mandatory**
renderingParameters	Set the parameters for rendering. **Object, mandatory**

Rendering parameter

Parameter	Description
mimeType	Set the output format. **"text/html", "image/gif", "image/png", "image/jpeg", "image/webp", mandatory**
width	Width of the output in pixels. **Positive integer, not 0, optional**
height	Height of the output in pixels. **Positive integer, not 0, optional**
colorDepth	Color depth **positive integer from 1 to 8, optional, default is 8 bit per color channel - or 8 bit palette at GIF, 16 bit is not supported**

Parameter	Description
compression	Compression **string, optional** • "image/gif": GIF is always LZW compressed, no interlacing, no transparency, sRGB / no compression parameter supported • "image/png": GIF is always DEFLATE compressed, no interlacing, no transparency, sRGB / no compression parameter supported. • "image/jpeg": The compression parameter string contains a quality value in percent (integer between 0 and 100, default value is 100). • "image/webp": The compression parameter string contains a quality value in percent (integer between 0 and 100, default value is 100).

Example

```
[
        {
                "formats": [
                        "FacebookFeedImagePost",
                        "FacebookFeedImageAd"
                ],
                "renderingParameters": {
                        "mimeType": "image/jpeg",
                        "widht": 1200,
                        "height": 630
                }
        },
        {
                "formats": [
                        "InstagramFeedImagePost",
                        "InstagramFeedImageAd"
                ],
                "renderingParameters": {
                        "mimeType": "image/jpeg",
                        "widht": 1080,
                        "height": 608
                }
        },
        {
                "formats": [
                        "TwitterTweet",
```

```
                        "TwitterSponsoredTweet"
                ],
                "renderingParameters": {
                        "mimeType": "image/jpeg",
                        "widht": 1200,
                        "height": 675
                }
        }
]
```

3.2.7 selectors.json

In the *selectors.json* above file, you define the selectors. With selectors, you reference the places in your sources that can be edited by the document creator. If a selector returns more than one match, then all matches are relevant. A selector can be used in different source files if the sources are compatible in this respect. The different types of selectors have different selector values.

WATERPROOF

The following code shows the selectors.json file for the WATERPROOF example. Note that this example illustrates the JSON structure for an online template, not for a container:

```
[
        {
                "uniqueName": "header_text_selector",
                "dom": {
                        "selectors": [
                                "#header_text"
                        ]
                }
        },
        {
                "uniqueName": "product_name_selector",
                "dom": {
                        "selectors": [
                                "#product_name"
                        ]
                }
        },
        {
                "uniqueName": "button_text_selector",
```

```
                "dom": {
                        "selectors": [
                                "#button_text"
                        ]
                }
        }
]
```

In this case three selectors are created, all three of type *dom*. The identifiers for the contents are the same in all source files, so that only identifiers need to be named here in each case.

JSON structure

The file is structured as an array of the following objects:

Parameter	Description
uniqueName	Enter the unique name of the source. **Unique identifier, mandatory**
dom	Selector type **Object, at least one of the selector types is mandatory**
cssom	Selector type **Object, at least one of the selector types is mandatory**

JSON structure for selector type *dom*

The type is structured as an array of the following objects:

Parameter	Description
selectors	Enter the identifier of the content to be selected by the selector. **Array of valid selector strings for document.querySelector(), mandatory**
property	Set the property of the content. **"innerHTML", "src", "alt", "href", or "className", optional, default is "innerHTML"**

JSON structure for selector type *cssom*

The type is structured as an array of the following objects:

Parameter	Description
hrefs	Enter the link to the CSS file whose formats the selector is to select. **Array of strings that do a sub-string match at document.styleSheets[].href to identify the related CSSStyleSheet object (1..n), mandatory**
selectors	Enter the identifier of the object whose format is to be selected by the selector. **Array of strings that do a string match at CSSStyleSheet.selectorText to identify the related CSSRule object, mandatory**
style	Enter the format you want the selector to choose. **name of the style property, mandatory**

Example

```
[
        {
                "uniqueName": "TextColor",
                "cssom": {
                        "hrefs": [
                                "landscape.css",
                                "portrait.css"
                        ],
                        "selectors": [
                                "#TextBox",
                                "#Headline",
                                "#Footer"
                        ],
                        "style": "color"
                },
                "js": {
                        "object": "colorManager",
                        "setter": "setColor"
                }
        }
]
```

3.2.8 rules.json

You define rules for the input of content and its final rendering through the *rules.json* above file. Rules can be referenced in the following files: contents.json and variables.json.

WATERPROOF

The following code shows the rules.json file for the WATERPROOF example. Note that this example illustrates the JSON structure for an online template, not for a container:

```
[
        {
                "uniqueName": "header_text_rule",
                "maxTextLines": 1,
                "maxTextLength": 12,
                "mandatory": true
        },
        {
                "uniqueName": "product_name_rule",
                "maxTextLines": 1,
                "maxTextLength": 30
        },
        {
                "uniqueName": "button_text_rule",
                "maxTextLines": 1,
                "maxTextLength": 15,
                "mandatory": true
        }
]
```

In this file, three rules are created that are to apply to text variables. The unique names in this case indicate that each rule should apply to one of the variables created in the WATERPROOF*variables.json* on page 131 example. Note, however, that the rules are referenced in *contents.json on page 138*.

ach rule specifies that the variable should be a single-line text field only. The maximum character length varies. Also note that the variables for the title and the button must always be filled (at least with a default value, if any). The product name does not necessarily have to be entered.

JSON structure

The file is structured as an array of the following objects:

Parameter	Description
uniqueName	Enter the unique name of the source. **Unique identifier, mandatory**
mandatory	Specify whether the rule is a mandatory rule. **Boolean, optional, default is false**

Rules for text variables

Parameter	Description
minTextLength	Enter a minimum length for a text variable. **Positive integer, not 0, optional**
maxTextLength	Specify whether the rule is a mandatory rule. **Positive integer, not 0, optional**

Rules for image variables

Parameter	Description
mimeTypes	Specify which file types and file formats the rule applies to. **Array of mime types, mandatory**
minPixelWidth	Set the minimum width in pixels. **Positive integer, not 0, optional**
maxPixelWidth	Set the maximum width in pixels. **Positive integer, not 0, optional**
exactPixelWidth	Set the exact width in pixels. **Positive integer, not 0, optional**
minPixelHeight	Set the minimum height in pixels. **Positive integer, not 0, optional**
maxPixelHeight	Set the maximum height in pixels. **Positive integer, not 0, optional**
exactPixelHeight	Set the exact height in pixels. **Positive integer, not 0, optional**

Parameter	Description
tiltedVariantAllowed	If the flag is set to true, formats that do not correspond to the width and height but to the swapped height and width are also valid. EXAMPLE: maxPixelWidth is 1280 px and maxPixelHeight is 800 px - depending on this flag a maximum size of 800 x 1280 px is also supported, not only 1280 x 800 px. Note that the combination (1280 x 1280 px) is not supported though. **Boolean, optional, default is false**
minAspectRatio	Set the minimum aspect ratio. **Plain text in format "x:y", optional**
maxAspectRatio	Set the maximum aspect ratio. **Plain text in format "x:y", optional**
exactAspectRatio	Set the exact aspect ratio. **Plain text in format "x:y", optional**
minBinarySize	Set the minimum size of the file. **Positive integer, not 0, optional**
maxBinarySize	Set the maximum size of the file. **Positive integer, not 0, optional**

Example

```
[
        {
                "uniqueName": "ShortSingleLineText",
                "maxTextLines": 1,
                "maxTextLength": 20
        },
        {
                "uniqueName": "RecipeName",
                "mandatory": true,
                "maxTextLines": 1,
                "maxTextLength": 20
        },
        {
                "uniqueName": "BackgroundImage",
                "mandatory": true,
                "mimeTypes": [
```

```
                        "image/png",
                        "image/jpeg"
                ]
        },
        {
                "uniqueName": "TwitterMedia",
                "mimeTypes": [
                        "image/gif",
                        "image/png",
                        "image/jpeg",
                        "image/webp"
                ],
                "minPixelWidth": 440,
                "minPixelHeight": 220,
                "maxPixelWidth": 1024,
                "maxPixelHeight": 512,
                "maxBinarySize": 5000000
        },
        {
                "uniqueName": "TwitterGIF",
                "mimeTypes": [
                        "image/gif"
                ],
                "maxBinarySize": 3000000
        },
        {
                "uniqueName": "TwitterMP4",
                "mimeTypes": [
                        "video/mp4"
                ],
                "minPixelWidth": 32,
                "minPixelHeight": 32,
                "maxPixelWidth": 1920,
                "maxPixelHeight": 1200,
                "maxVideoDuration": 200,
                "maxBinarySize": 512000000,
                "tiltedVariantAllowed ": true
        }
]
```

3.3 HTML File

This chapter provides you with information about which special issues must be taken into account when you create HTML files.

Before you design a new HTML template, you should first be clear about the intended purpose of the HTML template. For example, do you want to use the HTML template for a newsletter e-mail with HTML content or as a static HTML web page that users can open from a link in an e-mail? The former is much more difficult to create, because e-mails were originally intended purely for text messages and not for HTML. Furthermore, e-mail programs often do not support all of the HTML standards that are common on the web or they differ from the HTML standards that you support.

Depending on your later purpose of use, you must pay special attention to the various special issues described in the chapters below when creating e-mails with HTML content. Should the HTML template ...

- *be sent as an e-mail in HTML format?* If so, refer to the special issues listed in the chapters *HTML E-Mail Content for Outlook and Other E-Mail Clients* below and in *HTML and Special Issues for HTML Source Code Templates* on the facing page.
- *... function as a static page within BrandMaker that can be opened using a normal link?* It can then, for example, be sent to all users by e-mail. In this case, you can use the standard tools to create an HTML file without any major special issues. Please read *HTML and Special Issues for HTML Source Code Templates* on the facing page.
- *... be distributed as HTML content (for example, animated banners) via advertising networks?* In this case, you can use standard programs for creating the HTML file. For more information, see the chapter *HTML and Special Issues for HTML Source Code Templates* on the facing page.

3.3.1 HTML E-Mail Content for Outlook and Other E-Mail Clients

If you want to send the finished HTML as the body (message text) of an e-mail at a later stage, you must pay attention to the following issues when creating the HTML template:

> **Note**
>
> Note that HTML 5 and CSS 3 are not supported by many e-mail clients.

- *Inline CSS for skinning:* Use Inline CSS for the skinning (for example, for colors and fonts). Example:
- *No external CSS file:* Never store the CSS in an external CSS file and never provide a link to it in the <head>. Some e-mail clients delete external links or require user interaction to load them.
- Do not use JavaScript.
- Do not use Flash.
- *Test:* Before uploading the HTML file to Brand Template Builder, you should test the template in various e-mail clients and browsers to detect and resolve any potential weak points.

  > **Note**
  >
  > Before testing the e-mail in the various e-mail clients, you can also test it in the browsers. If the display is okay in these tests, it is more likely that any problems that arise in the e-mail clients will only be minor ones. However, if major display errors occur during the tests in the browser, then they will also occur in the tests in the e-mail client. In this case, change the configuration of your HTML file and perform the test again in the browser before performing the test with the e-mail clients.

3.3.2 HTML and Special Issues for HTML Source Code Templates

Structure of the Source Code

- *HTML editor:* To create an HTML template, you require an HTML editor (Notepad, for example).
- *Provision as a ZIP file:* An HTML template must always be a ZIP file that contains the HTML raw data and all of the linked files in the HTML (for example, images). A folder hierarchy is permitted. This requires a unique name for images that are stored in the different folders.
- *UTF-8 encoding:* Please ensure that all CSS, JS, and HTML files are UTF-8-encoded.

- *Links to external servers:* You are also allowed to link CSS, JS, or image files to external servers; however, you should note that this content cannot be edited by the document creator.
- *Preview image:* A preview image for the template is generated automatically during the upload. Alternatively, you can provide a preview image in the ZIP file, which is then displayed instead of the automatically generated preview image. Name the preview image *template_preview* and store it in a directory with the same name. The permitted formats for the preview image are PNG, GIF, and JPG.
- *Index:* Each HTML file must contain an *index.html* or *index.htm* file. This file contains all of the HTML source code.
- *Image formats:* The formats JPG, JPEG, GIF, BMP, SVG, and PNG are permitted for images.
- *Style definition:*As explained in HTML E-Mail Content, style definitions should be placed inline (that is, in the source code (*index.html*) if you want to use the HTML template as the body of an e-mail later. If you do not create an e-mail with HTML content, you can store all of the style definitions in one or more of the CSS files provided for them (for example, *style.css*).
- *HTML 5:* HTML-5 specific tags are supported in the source code. Please note that HTML-5 specific tags are not supported by all browsers. The creator of the HTML template, the creator of the HTML content, and the target group require HTML-5 compatible browsers to display the content correctly.

Text Boxes

To ensure that document creators can adapt texts from the HTML source text, you have to define variables in the source text. A variable is defined using the tags [@ and @]. The text between these tags can be adapted.

EXAMPLES

<table><tr><td>[@Hello World@]</td></tr></table>

This source code creates a text box called *Hello World* in Brand Template Builder after the template is uploaded. The text can be adapted in any way.

<table><tr><td bgcolor="[@grey@]">Hello World</td></tr></table>

This source code creates a text box called *grey*. You can also use this method to adapt colors and other style definitions.

You can also define variables in CSS and JS files that are included in the ZIP file. Note that the real-time preview is not supported in this case and is therefore deactivated automatically for a template such as this one.

Image Boxes

Unlike the creation of text boxes, you do not have to make any special configurations to create image boxes. All of the images in the HTML source code that were created using the element <img> (for example, <img src="test.jpg" alt="test" width="100px" height="100px">) are automatically created as image boxes. Images that are used as background images for a table (for example, <table style="background-image:url(test.jpg)" ...>) are not created as image boxes.

You must use only the following characters for image names:

- a-z, A-Z
- - (hyphen)
- _ (underscore)

Images in the ZIP file that are used in CSS or JS files are also automatically created as image boxes. Note that the real-time preview is not supported in this case and is therefore deactivated automatically for a template such as this one.

Text-to-Image Boxes

A particular feature of HTML templates is the generation of images from text. This is useful when you want to display a header in a font type that is not available on the web. If this is the case, you can assign the class graphical_text to an image. You assign the class either in the source code or in step 3 of Template Design. If you assign the class in the source code, the option is set by default in template design step 3; however, it can still be changed.

Note

Note: in this situation, the attributes *width* and *height* should not be assigned to these images.

EXAMPLE

Incorrect:

<img src="test.jpg" class="graphical_text" width="100px" height="100px" alt="test">

Correct:

<img src="test.jpg" class="graphical_text" alt="test">

In Brand Template Builder, an image defined like this is not created as an image box but as a text box. The text added in the text box is rendered as an image using parameters defined beforehand (see *Displaying Text in Text-to-Image Boxes* on page 327) and added to the HTML source code. The height and width must not be specified, otherwise the image may be disrupted.

4

Creating an INDD Template

To create an INDD template, proceed with the following steps:

1. INDD file as an asset in the Media Pool: to use an INDD file for a template, you must create the file as an asset in the Media Pool. For information about creating assets, refer to the Media Pool user manual (*Additional Documentation* on page 424).
2. *Creating the Template* on the facing page: after the INDD file is created as an asset, you create the template.
3. *Processing Rules* on page 167: you then define the processing rules for the document creator. The rules define how the document creator can change texts, images, and the document structure.
4. *Help Sections and Process Specifications* on page 290: you can support the document creator with a series of measures during editing and preset process steps.
5. *Finalization and Release* on page 302: to finalize and, where necessary, request approval for the template, go to step 6 of Template Design. This step summarizes the settings made in the previous steps as well as other information about your template.

4.1 Creating the Template

After the INDD file is created as an asset in the Media Pool, you create the template:

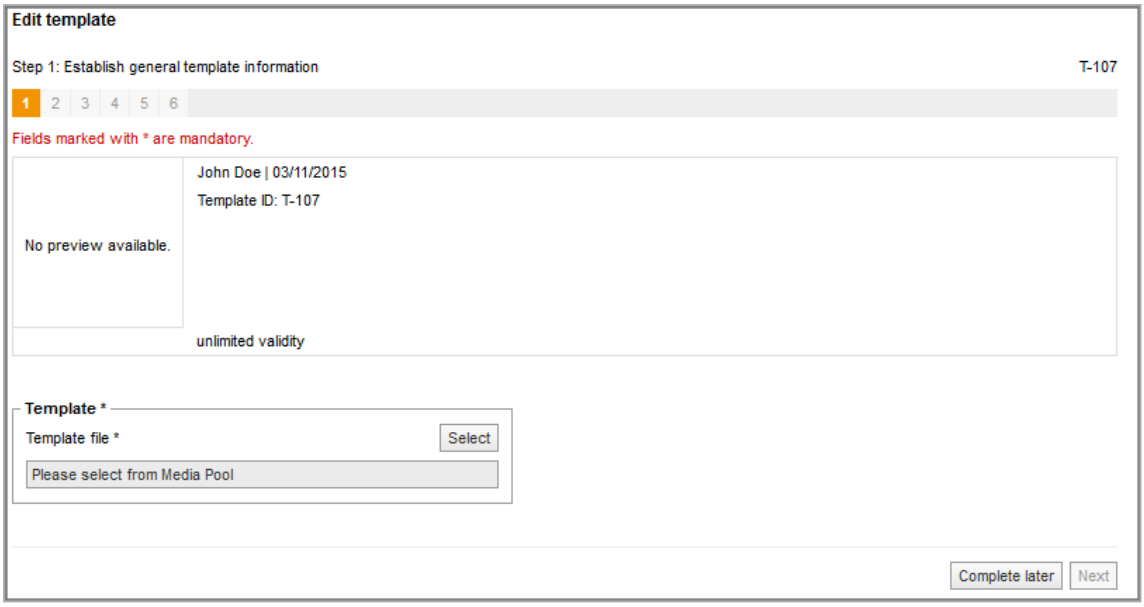
- *Selecting the INDD File* below: to create an INDD template, go to Template Design and select the templates in the Media Pool.
- *Automatic Configuration* on page 161: the *Start Auto-configuration* function makes it easier for you to edit the boxes, formats, and properties.
- Importing a configuration: if you want to use a template with this configuration in a different system (a test system, for example), import the configuration. The whole process is described in *Transferring a Template to a Different BrandMaker System* on page 374.
- *Setting an Alternative Preview Image* on page 162: You have the option of replacing the preview image of the INDD file in the Media Pool with another image.
- *Properties of the INDD Template* on page 162: you then edit the properties of the template. The properties are used to describe the template and make it easier to find.

4.1.1 Selecting the INDD File

To create an INDD template, you must first open the template design. You have two options to do this:

- Under > *Templates* in the upper right corner, click *New INDD Template*.
- Click > *Designer* and then select *New INDD Template* in the navigation on the left.

You open the *Edit template* page in step 1:



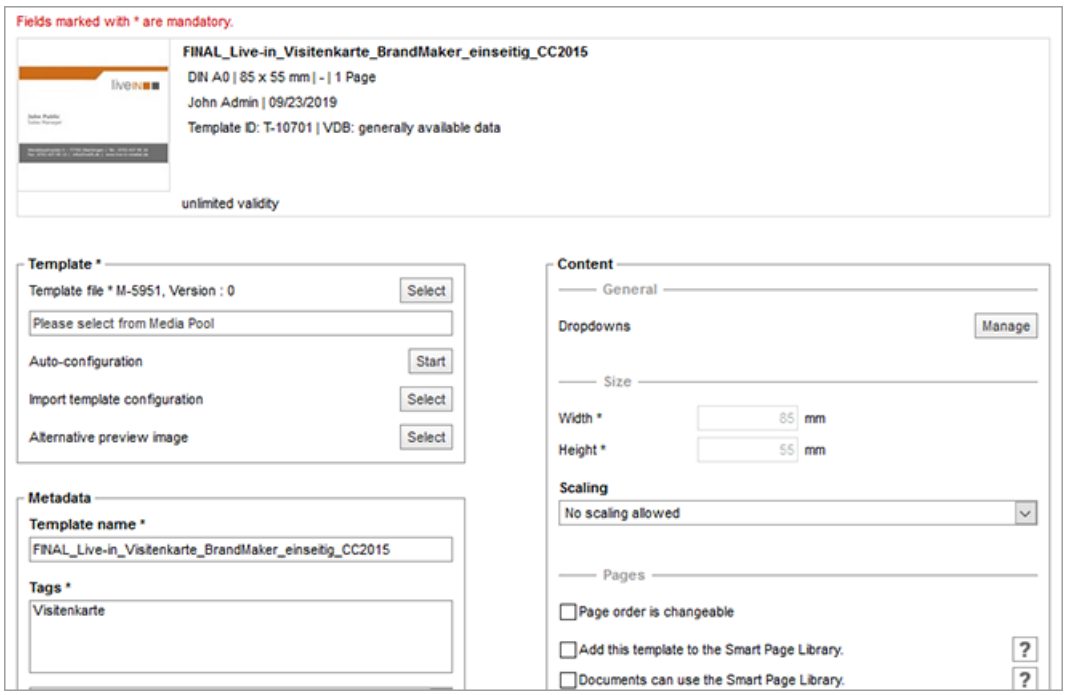
Selecting an INDD File

1. Choose *Select*.

   The *Select template file* dialog box opens together with the *Media Pool* search functions.

2. Search for the template file that you want to select.
3. In the search result, choose the Plus button next to the file that you want to select.

You have selected the template file. Step 1 of Template Design is displayed again together with the selected template file. In addition to the template file information transferred from the Media Pool, the system automatically creates more data.



Next Step

You can configure the template automatically (see *Automatic Configuration* below) or apply a configuration from a different template (for example, from a test system) (see *Transferring a Template to a Different BrandMaker System* on page 374). You can also specify an alternative preview image that is displayed instead of the preview image of the template file. Note the chapter *Setting an Alternative Preview Image* on the next page.
If you do not want to use any of these options, continue with the section *Properties of the INDD Template* on the next page.

4.1.2 Automatic Configuration

The *Start Auto-configuration* function makes it easier for you to edit the boxes, formats, and properties:

- All of the texts are defined as fully changeable and the individual frames are named based on a specific pattern (named after page and serial number).
- If possible, the paragraph and character styles used are assigned automatically. If styles are not found, a message informs you about the unassigned styles. The styles found can be applied when using the template.
- The asset information is read out and entered in the corresponding metadata fields.

Starting Automatic Configuration

Note

If you have already edited fields and then click *Start*, the edited fields are reset or changed.

1. Open the template in step 1 of Template Design.
2. Choose *Start*.

Brand Template Builder automatically configures the individual editing steps for Template Design.

Next Step

If necessary, define an alternative preview image, see *Setting an Alternative Preview Image* belowIf you do not have an alternative preview image, continue editing the template, see *Properties of the INDD Template* below.

4.1.3 Setting an Alternative Preview Image

You have the option of replacing the preview image of the INDD file in the Media Pool with another image. Assets in the file formats GIF, JPG and PNG are possible.

1. Open the template in step 1 of the Template Design.
2. Click the *Select* button at *Alternative Preview Image*.

   The *Alternative Preview Image* dialog with the search functions of the *Media Pool* module opens.
3. Search the image file you want to select.
4. In the hit list, click the button for the file you want to select.

The template is displayed with the alternative preview image.

4.1.4 Properties of the INDD Template

The properties are used to describe the template and make it easier to find. An INDD template can have the following properties. You reach the properties in step 1 of Template Design.

Properties

Name	Description	Filled automatically?	Editable?
Owner	Name of the template designer who created the INDD template.	Yes	No
Width and height	Width and height of the layout file.	Yes	No
Page count	Amount of pages created in the template file.	Yes	No
Creation date	Date on which the template was created.	Yes	No
Template ID	Unique identification number for the template, which is generated automatically by the system (prefixed with a T).	Yes	No
Template file	ID of the asset selected for the template along with the asset version.	Yes	No
Template name	The name of the template, prefilled with the asset name.	Yes	Yes
Tags	The tags entered for the asset are applied.	Yes	Yes
Categories	The categories entered for the asset are applied if they are available in Brand Template Builder. For more information about categories, refer to the administration manual (see *Additional Documentation* on page 424).	Yes	Yes
Virtual DB	The template storage location. Note that this affects the visibility of the template for users. The virtual database assigned to the asset is preselected.	Yes	Yes

Name	Description	Filled automatically?	Editable?
Document type	This field describes the type or purpose of the documents created on the basis of the template (for example, advert, job advert, business card). The field can be searched through in the advanced search. Note: the entries that you can see are determined in a custom structure (see *Descriptive Properties* on page 23).	No	Yes
Format	This field describes the size of the documents (for example, standard sizes such as DIN A3 or DIN A4 or predefined advert sizes). The field can be searched through in the advanced search.	No	Yes
Color	The field describes the color of the advertising material (for example, *RGB* or *6 colors (CMYK and 2 spot colors)*). The field can be searched through in the advanced search. Note: the entries that you can see are determined in a custom structure (see *Descriptive Properties* on page 23).	No	Yes
Information for the user	Additional information about the template, such as the target group or area of application. The entries are displayed at the following points: • In the hit list together with the technical details • In the template details in the customizing wizard • In the details about the document in the document editor	No	Yes

Name	Description	Filled automatically?	Editable?
Validity periods	Specify whether validity periods can be set for the template and document based on it. For this purpose, the checkboxes *Validity period of the template is configurable.* and *Validity period of the document is configurable.* are displayed. If the first checkbox is enabled, you can set a validity period for the template. In this case, the second checkbox is automatically checked as well and cannot be changed, i.e. the document creator can also set a validity. If the first checkbox is disabled, you can use the second checkbox for documents to choose whether the document creator can set a validity. If the second checkbox is disabled, the document creator will not see any validity fields in the document's properties-edit dialog. Note: After a migration from version 6.9 or older to version 7.0 or younger, the checkboxes are enabled for migrated templates. When new templates are created, the checkboxes are disabled by default.	No	Yes

Custom Properties

The standard properties may not be sufficient to characterize your templates. An administrator can therefore create suitable properties and their values, see *Custom Properties* on page 38. As the designer, you assign the values of the properties to the template in step 1 of template design in the *Custom Properties* area. You can also use one of the properties as a grouping property to group templates under it. This allows the document creator to find the templates faster and easier. Templates with the same value in the grouping property are displayed as a tile in the search results.

Note

Contact your system administrator if you have questions about the custom properties and a grouping property. The system administrator manages the custom properties and can explain their intended use.

1. Select a property from the *Custom Properties* drop-down list.

   In the *Values of Custom Properties* list, associated values are displayed.

2. Select a value of the custom property.
3. Click the plus sign.

The value of the property is assigned to the template.

Next Step

In the next step, you define the *Processing Rules* on the facing page based on which the document creator can edit the document.

4.2 Processing Rules

In this step, you define the processing rules for the document creator. The rules define how the document creator can change texts, images, and the document structure. Work through the following steps:

1. *Template Type* below: first, choose the type of template that you are creating: *basic template*, *Smart Page*, or *Smart Group*. You also define the characteristics of the template, such as whether the template is suitable for mass customization or whether it can be enhanced with Smart Pages.
2. *Multilingualism* on page 195: Specify how many languages (locales) the document should contain. You also define to which locale the formula, data object, and date variables are assigned.
3. *Content of Text Boxes* on page 199 and *Content of Image Boxes* on page 223: in this case, you define whether and how the document creator can edit the content of text and image boxes.
4. *Variants* on page 238: you use the variants function if the content of boxes, their editing and, under certain conditions, the color scheme changes depending on a characteristic.
5. *Displaying Text and Image Boxes* on page 247: in this step, you configure the available transformations, frame options, and - if the template is scalable - the alignment and size adjustment for the boxes.
6. *Document Structure* on page 273: in this step, you choose which changes the document creator can make to the document structure and which characteristics the document must have, such as the maintenance of a page divider.

Next Step

In the next step, you set up *Help Sections and Process Specifications* on page 290 for the document creator.

4.2.1 Template Type

By defining the template type, you define how the template can be used. In Brand Template Builder, there is a difference between the *basic template*, *Smart Page*, and *Smart Group* template types.

Note

The template type does not determine whether and how texts and images can be changed. You define how texts and images can be changed in the subsequent work steps.

Basic Template

The basic template is the template with which a document creator starts. It may be a brochure or advert, for example.

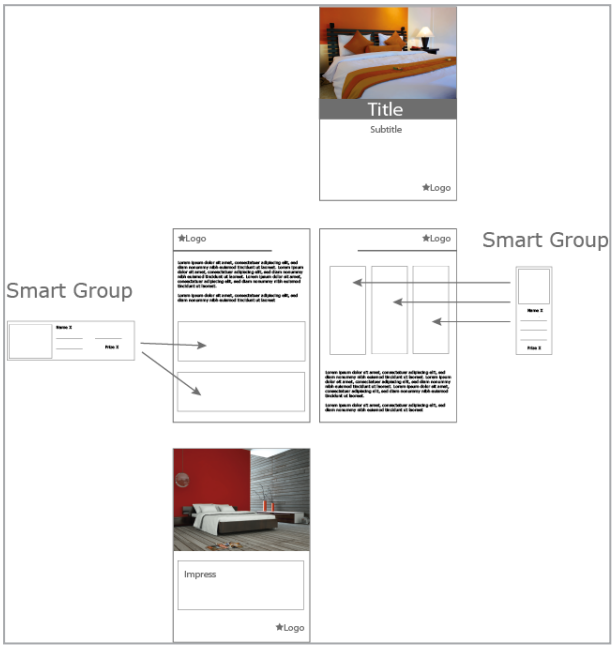
- Example of a brochure:

- Example of an advert:

For information about configuring a basic template, see the section *Defining the Basic Template Type* on page 173.

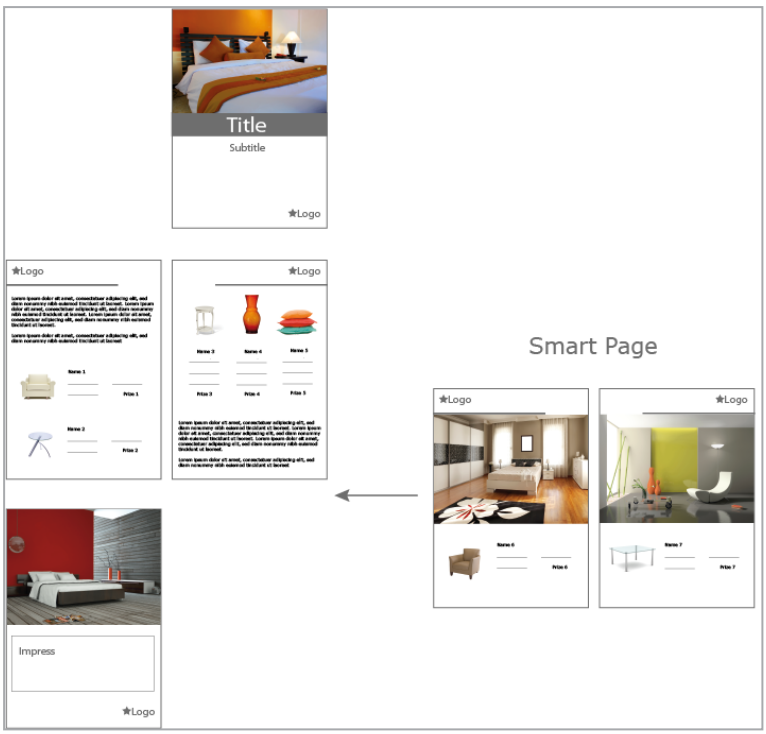
A basic template may have the following characteristics:

- *Enhancement with a Smart Group* A Smart Group is an INDD template that is used as a part of a page in a template. Examples include replaceable elements that map data (product image, technical data, price) in a brochure:



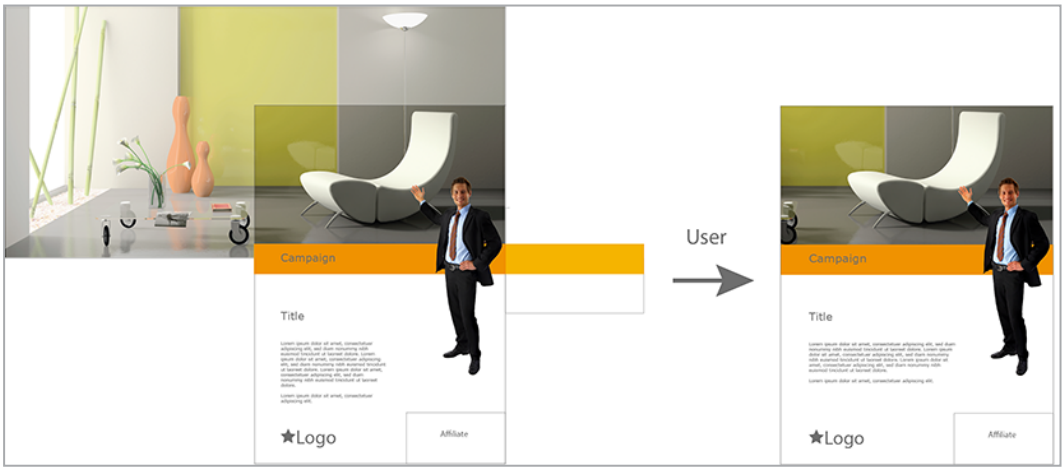
  To allow the document creator to use Smart Groups in a template, you, as the template designer, must activate this feature in the template.

- *Enhancement with a Smart Page* A Smart Page is also an INDD template, but it must contain at least one page. The user adds the page(s) of a Smart Page to the basic template. In doing so, the user can add the Smart Pages to the basic template or use them to replace its pages:



To allow a user to add a Smart Page, you, as the template designer, must activate this feature in the template.

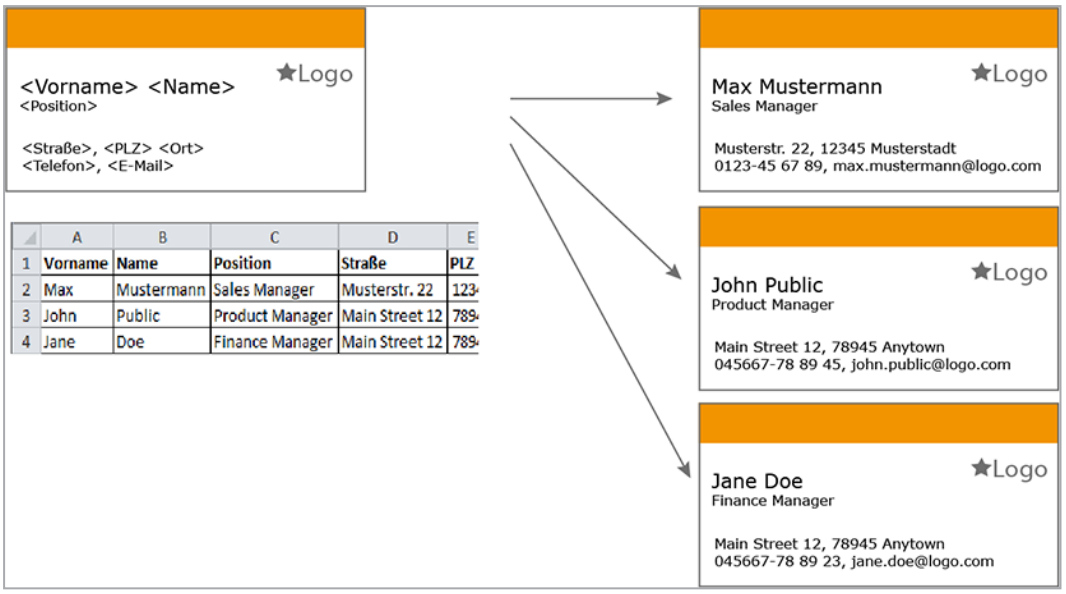
- *Scalable* If you create a scalable basic template, the user can change the dimensions of the document at a later stage. The user can use the feature, for example, to adapt an ad to the specifications of different newspapers (e.g. the column width):



Note: note that you can use this feature only in single-page basic templates that cannot be enhanced with Smart Pages.

- *For Mass Customization* This feature is a serial letter function. With a basic template for mass customization, the user can create multiple documents in which the variable components are filled with data from an Excel file. Typical use cases include address data for a letter or personal data for a business

card.



Note: note that you can use this feature only in single-page basic templates that cannot be enhanced with Smart Pages or Smart Groups.

Smart Page

A Smart Page is an INDD template that contains at least one complete page and that is created to be integrated into basic templates. A Smart Page may have the trait:

- *Enhancement with a Smart Group* Like basic templates, Smart Pages can also be enhanced with Smart Groups.

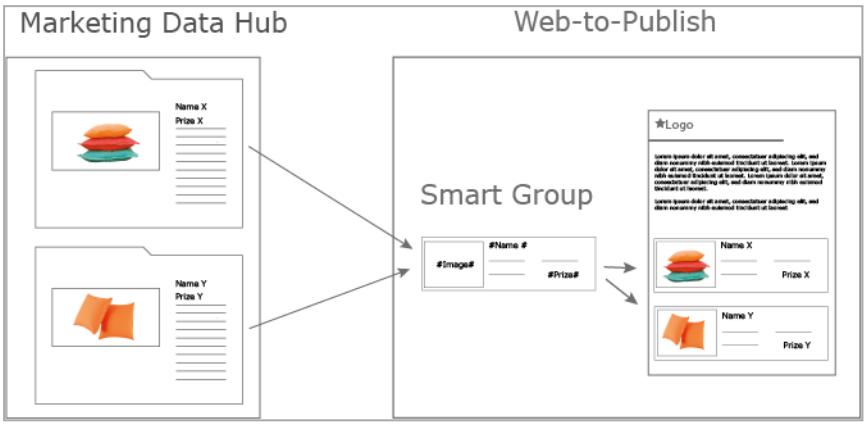
For more information, see *Defining a Smart Page Template Type* on page 194.

Smart Group

A Smart Group is a template that is used as a section (i.e. a part) of a page in a different template. A single-page INDD template must therefore be used for a Smart Group. A Smart Group cannot be enhanced and is not suitable for mass customization. A Smart Group can have the following traits:

- *Scalable*You can also configure Smart Groups to be scalable in the same way as basic templates. Use this feature when you add Smart Groups to scalable basic templates. The positioning of the Smart Group text and image boxes is applied while scaling the basic template.

- *Connectible with Data Hub*The only way to connect data from the Marketing Data Hub module is with Smart Groups. You use the Smart Groups to load the data to the basic template (a product brochure, for example):



For more information, see *Defining the Smart Group Template Type* on page 194.

Associated Tasks

- *Defining the Basic Template Type* below
- *Defining a Smart Page Template Type* on page 194
- *Defining the Smart Group Template Type* on page 194

Next Step

In the next step, you determine whether the template is created in several languages, see *Multilingualism* on page 195. If the template is a monolingual template, you configure the content of the boxes (for example, whether the content can be changed at all or is supplied by an external source). Since the configuration of text and image boxes differ significantly, the configuration of text boxes is described first (see *Content of Text Boxes* on page 199). If you want to go directly to the configuration of image boxes, read the section *Content of Image Boxes* on page 223.

4.2.1.1 Defining the *Basic Template* Type

You do not have to configure any specific settings to create a basic template. Simply ensure that the following checkboxes are deactivated:

- *Add this template to the Smart Page Library.* (*Pages* area in step 1 of Template Design)
- *Add this template to the Smart Group Library.* (*Smart Groups* area in step 1 of Template Design)

To define more features for a basic template, see the following sections:

- *Enhancement with a Smart Group* below
- *Enhancement with a Smart Page* on page 178
- *Scalable* on page 178
- *For Mass Customization* on page 187

Combinations of Features

The following combinations of features are possible. Note that this has no effect on the ability to change texts and images in the document.

Smart Page	Smart Group	Scalable	Mass Customization	Description
✓				The document creator can add pages to the document.
	✓			The document creator can add sections to the document.
		✓		The document creator can change the size of the document.
			✓	The document creator can apply a serial letter function to the document.
✓	✓			The document creator can add pages and sections to the document.
	✓	✓		The document creator can add sections to the document and change the size of the document. Note: only for single-page templates!
		✓	✓	The document creator can change the size of the document and apply a serial letter function to the document. Note: only for single-page templates!

4.2.1.1.1 Enhancement with a Smart Group

To allow the document creator to add Smart Groups to a document, placeholders (grids) must be available. You have two options for creating these grids in a template:

- Smart Grids: configure boxes in the INDD file as Smart Grids. The document creator can then select suitable Smart Groups. Here, you preset the arrangement and size of the Smart Groups.
- Dynamic grids: the document creator creates grids. Brand Template Builder helps the document creator to create grids of a suitable size. With dynamic grids, you give the document creator more design options. However, when there are a number of different document creators, the results vary much more than with Smart Grids. You can limit the area of the page in which the document creator can add dynamic grids: in the case of a multi-page document, either lock a page or allow grids to be added on the page. You can also restrict the addition to the area of a box on the page.

Note

You can use either Smart Grids or dynamic grids in a template. This is the case even if a basic template is enhanced with Smart Pages: the document creator can select only Smart Pages that use the same grids as the basic template.

Note that you can no longer change your choice of Smart Grids or dynamic grids in a template after documents are created with the template.

Preparing a Template for Smart Grids

If you want the document creator to add Smart Groups to Smart Grids, proceed as follows:

1. Go to step 1 of Template Design.
2. In the *Smart Groups* area, select *Document boxes* in the *Smart Grids are placed here* picklist.
3. Go to step 3 of Template Design.
4. Choose a box to which you want the document creator to add a Smart Group.
5. In the *Content* area, select the *Smart Grid* radio button.
6. Repeat steps 4 and 5 for all the boxes that you want the document creator to use as a grid for a Smart Group.

The template can be enhanced with Smart Groups. The document creator can add the Smart Groups only in the designated grids.

Preparing a Template for Dynamic Grids

If you want the document creator to add Smart Groups to dynamic grids, proceed as follows:

1. Go to step 1 of Template Design.
2. In the *Smart Groups* area, select *Document grid* in the *Smart Grids are placed here* picklist.
3. Go to step 3 of Template Design.
4. In the *Smart Grid Options* area, choose the page area in which the document creator can add dynamic grids.
5. If the template has multiple pages: go through all the pages and repeat step 4.

The template can be enhanced with Smart Groups. The document creator creates dynamic grids in the document grid.

Document Grids

You access the settings for the document grid in step 1 of Template Design:

Field	Description
Document grid size	Define the default document grid size. The document grid is displayed with the *More Actions* button when customizing the document. Dynamic Smart Grids and dynamic image boxes can be created only when the document grid is displayed.
Maximum document grid size	Enter the maximum value that can be selected in the document editor with the function *> More Actions > Change document grid*.
Minimum document grid size	Enter the minimum value that can be selected in the document editor with the function *> More Actions > Change document grid*.

Consistent data object type

Object data is created in the *Marketing Data Hub* module using so-called data object types. Depending on the type, very different data can be created for the objects. To ensure that the data is used consistently, you can restrict the insertion of data in the documents based on the template to one type:

Field	Description
Consistent data object type	Specify whether only the data of objects of the same type can be inserted: • *None*: The document creator can insert the data of objects of any type. • *You select an explicit type from the list*: The document creator can only insert data objects based on this type.

Positioning Smart Group Levels

In the Smart Groups area in step 1 of Template Design, you choose how the levels of a Smart Group can be integrated into the document levels:

Field	Description
Positioning	Choose how the layers of a Smart Group are added to the layers of the document: • *In new layers*: the layers of the Smart Group are created as new layers in the overall document. • *In existing layers*: if layers with the same name in the Smart Group and in the document exist, the layers are merged. Layers that have different names are created in the document.

Restricting the Visibility of Smart Groups for the Document Creator

You can restrict the visibility of Smart Groups to make it easier for the document creator to make selections. In step 1 of Template Design, you can access the following settings in the *Smart Groups* area:

Field	Description
Search phrase for Smart Groups	Restrict the Smart Groups that can be found by the document creator by entering a search term. Only Smart Groups whose name contains the search term are displayed for the document creator.

Field	Description
Select explicit Smart Groups	Restrict the Smart Groups that can be found by the document creator by entering one or more explicit Smart Groups for the template: 1. Choose *Smart Group Library*. 2. The available Smart Groups are displayed. 3. Select the required Smart Groups by clicking the checkbox in the bottom right corner of the preview image. 4. Click *Save*.

4.2.1.1.2 Enhancement with a Smart Page

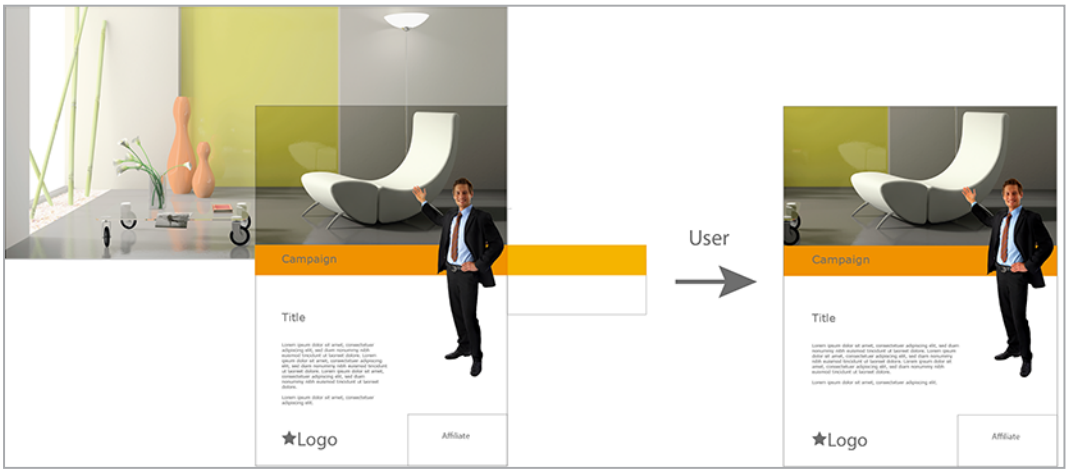
To enable a basic template to be enhanced with a Smart Page, go to step 1 of Template Design. In the *Pages* area, activate the checkbox *Documents can use the Smart Page Library*:

Field	Description
Documents can use the Smart Page Library.	If this checkbox is activated, the document creator can access the Smart Page Library and use the Smart Pages contained in it to enhance the document.

You must define the available structure for a basic template that can be enhanced with Smart Pages. For more information, see the section *Document Structure* on page 273.

4.2.1.1.3 Scalable

If you create a scalable basic template, the document creator can change the dimensions of the document. The document creator can use this feature, for example, to adapt an ad to the specifications of different newspapers (e.g. column width):



Note:

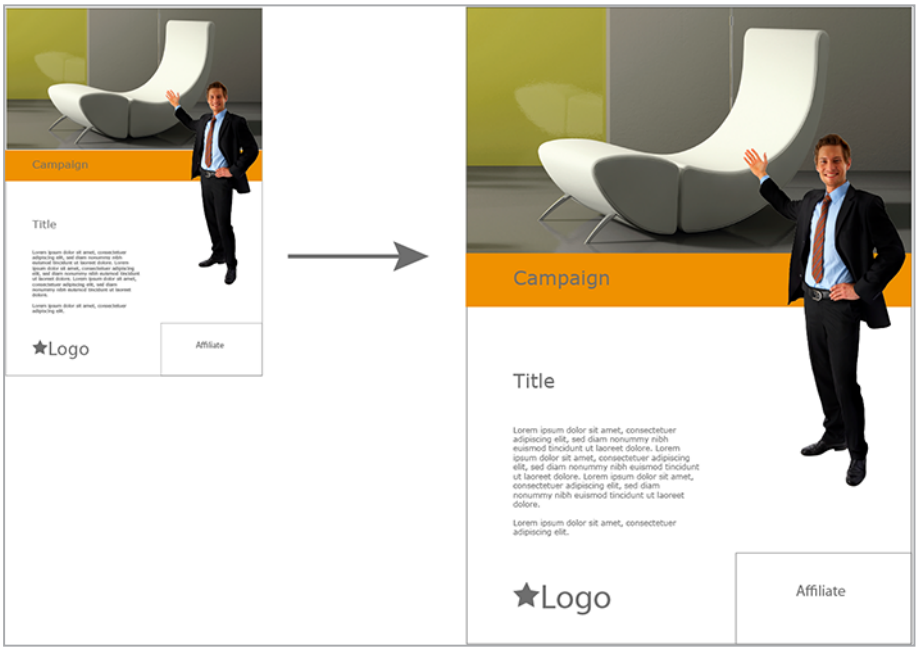
Note that you can use this property only in single-page basic templates that cannot be enhanced with Smart Pages.

You can also configure Smart Groups to be scalable in the same way as basic templates. Use this feature when you add Smart Groups to scalable basic templates. The positioning of the Smart Group text and image boxes is applied while scaling the basic template.

Scaling Options

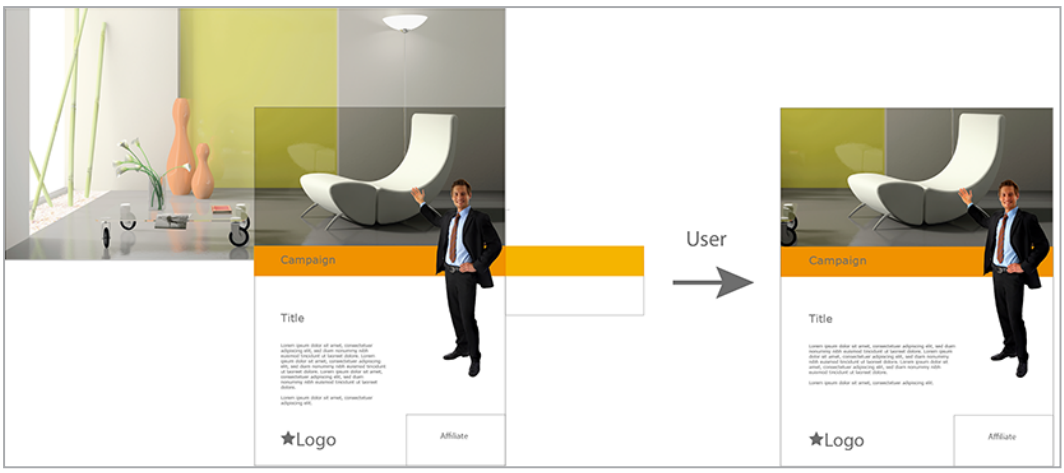
You have the following options for setting scalability for the document creator:

- *Scale content with document*
  the document creator scales the document and content (images and text):



  You must also define the range in which the document creator can zoom. See the section *Scaling Range* on the next page below.

- *Scale document*
  The document creator scales the document, while the size of the content (images and text) remains unchanged. The position of the content depends on the settings for the relevant box in step 3 of Template Design (see *Alignment and Size Adjustment* on page 269).



You must also define the range in which the document creator can change the dimensions. See the section *Scaling Range* below.

- *Adapt document height automatically*
  The document creator scales the width of the document. The document height is based on the quantity of text in the text box for which the corresponding frame option is activated. For more information, see the section *Frame Options* on page 250.
  You must also specify the range in which the document creator can change the width. See the section *Scaling Range* below below.

Configuring a Scalable Basic Template

*Prerequisite*You have selected a single-page INDD file.

1. Go to step 1 of Template Design.
2. In the *Size* area, select one of the scaling options in the *Scaling* picklist.
3. Enter the minimum and maximum values for the width and height.
4. If you want to limit non-proportional scaling, activate the checkbox. Enter suitable factors for the horizontal and vertical non-proportional scaling. For more information, see *Scaling Range* below.

The document creator can scale the document.

4.2.1.1.4 Scaling Range

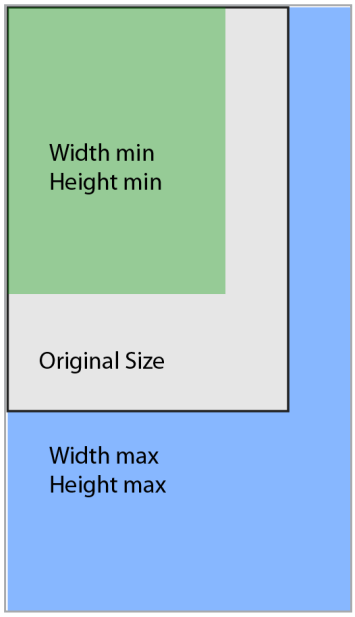
You require a scaling range in the following situations:

- You are designing a scalable base template or Smart Group. You then define the scaling range in step 1 of Template Design. In the *Size* area, select one of the scaling options *Scale content with document* or *Scale document* to set the

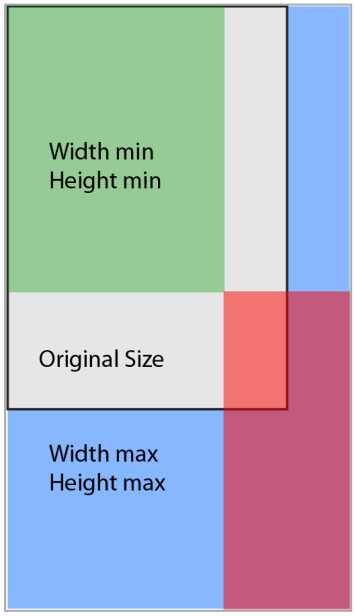
full scaling range (for the scaling option *Adapt document height automatically*, you set only the minimum and maximum width of the page). See also *Scalable* on page 178.

- You permit box scaling. You define the scaling range in step 3 of Template Design. See also *Transformation* on page 247.

First, enter the minimum width and height and maximum width and height, either in absolute values in the unit displayed or as a percentage. These specifications are used to calculate a minimum (green) and maximum (blue) size of the page or box:

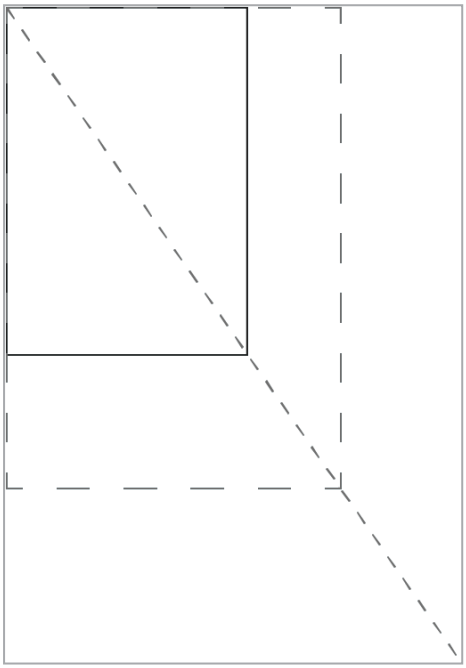


The document creator can use these settings to scale items freely within specified limits; that is, the lower right-hand corner point can be positioned anywhere within the (red) scaling range:

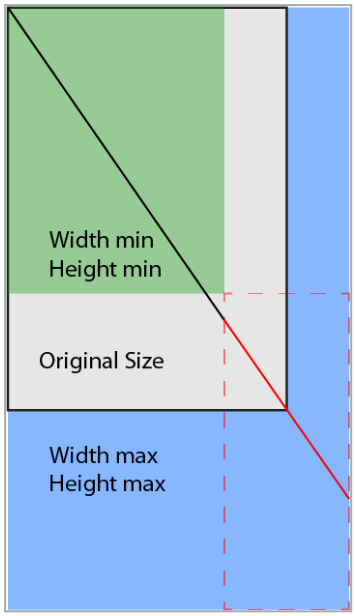


This means that the ratio of the height and width may not necessarily be maintained, which may lead to undesired serve distortions of the content. If you want to allow the document creator to perform non-proportional scaling only with restrictions, activate the checkbox *Limit non-proportional scaling*. You can then enter the maximum horizontal and vertical non-proportional scaling.

If a page or box is scaled proportionally, the opposite corner points are on the same diagonal at each size. That is, the width and height remain in the same ratio to each other:



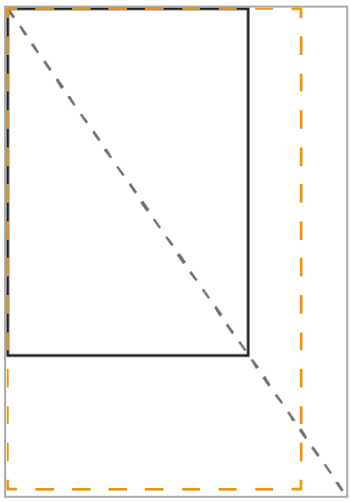
If you want the page or box to always be scaled proportionally, ensure that 0% is entered in both the *Horizontal non-proportional scaling* and *Vertical non-proportional scaling* fields. In this case, the document creator can set any size where the lower right corner point is on the red part of the diagonal (that is, the part within the prior scaling range):



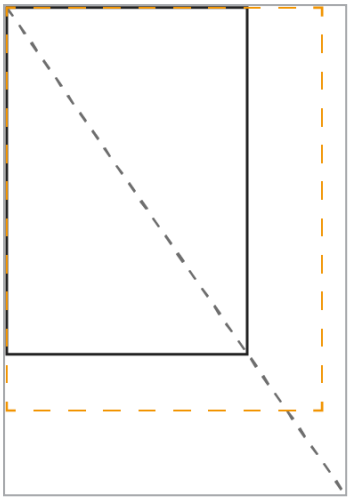
Note

Note that the document creator in the example above can no longer set the original minimum and maximum size because their lower right-hand corner points are not on the diagonals. However, these sizes are displayed for the document creator as possible sizes, because Brand Template Builder does not make readjustments. In such cases, we recommend readjusting the minimum and maximum values for the width and height to avoid misunderstandings.

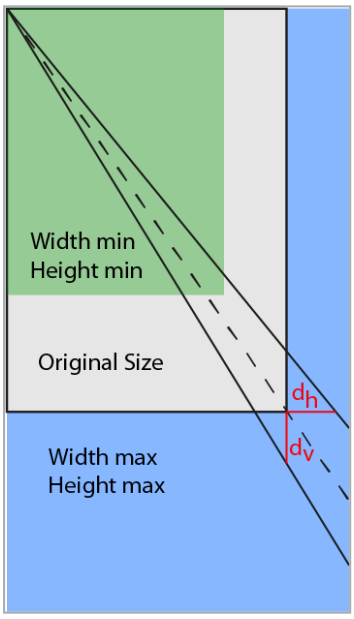
If a document is scaled non-proportionally, the second corner point is no longer on the diagonals. For vertical non-proportional scaling, the corner point is below the diagonals:



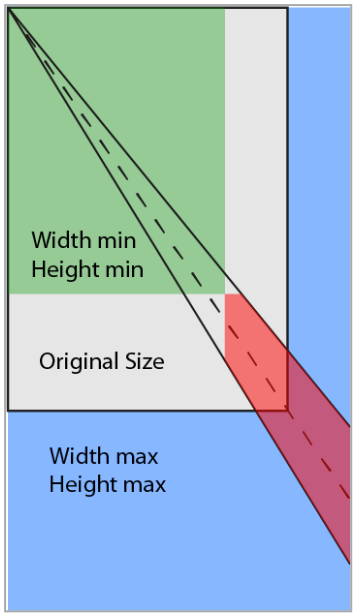
For horizontal non-proportional scaling, the corner point is above the diagonals:



If you want to permit horizontal and/or vertical non-proportional scaling, enter the maximum percentage deviation in the corresponding fields. The meaning of the values are as follows:



The character d_h corresponds to the *Horizontal non-proportional scaling* field and indicates the maximum percentage by which the proportional width can be increased. The value d_v corresponds to the *Vertical non-proportional scaling* field and specifies the maximum percentage by which the proportional height can be increased. See the *Calculation* section below for the calculation of the corresponding minimum values.
You use d_h and d_v to specify the lines above or below the diagonals that define the new scaling range together with the minimum and maximum values for the width and height:



The document creator can then set any size where the bottom right-hand corner point is within the new (red) scaling range.

> **Note**
>
> Where necessary, we also recommend readjusting the minimum and maximum values for the width and height in this situation to avoid misunderstandings while creating the document.

Calculation

Note that Brand Template Builder truncates each calculation to one decimal place.

Formula Symbols

- h: height
  - h_p: the proportional height for a given width
  - h_{min}: the minimum page height; limit value that you as the template designer specify.
  - h_{max}: the maximum page height; limit value that you as the template designer specify.
  - $h_{d\ min}$: minimum height that can be set by the document creator when using non-proportional scaling.
  - $h_{d\ max}$: maximum height that can be set by the document creator when using non-proportional scaling.

- w: width (**w**idth)
    - w_p: the proportional width for a given height
    - w_{min}: the minimum page width; limit value that you as the template designer specify.
    - w_{max}: the maximum page width; limit value that you as the template designer specify.
    - $w_{d\ min}$: minimum width that can be set by the document creator when using non-proportional scaling.
    - $w_{d\ max}$: maximum width that can be set by the document creator when using non-proportional scaling.
- d: non-proportional scaling (**d**istortion)
    - d_h: horizontal non-proportional scaling; percentage value that you as the template designer enter.
    - d_v: vertical non-proportional scaling; percentage value that you as the template designer enter.
- c: correction factor
  Note that the correction factor c is a constant that is dependent on the unit used:
    - Millimeter: 0.15 mm
    - Centimeter: 0.015 cm
    - Inch: 0.015 inch
    - Pixel: 1.5 px

Height with a Given Width

down to the lower limit of h_{min} - c

up to the upper limit of h_{max} + c

Width with a Given Height

down to the lower limit of w_{min} - c

up to the upper limit of w_{max} + c

EXAMPLE

You are using a template with a page that has the dimensions 210 x 270 mm (width x height). You permit a maximum scaling of 250 x 335 mm. Scaling down is not possible, therefore the minimum width and height is 210 and 270 mm.

With these settings, the document creator can scale the document to 210 x 335 mm. When using the scaling option *Scale content with document* in particular, this may cause unsightly distortions. If you want to limit this issue, enter an appropriate factor, such as 5 % for vertical scaling. Now, when the document creator changes the width, the maximum height is as follows:

This means that the document creator can set a maximum height of 283.6 mm.

If the document creator wants to set the maximum height of 335 mm, he or she must set the following width at minimum:

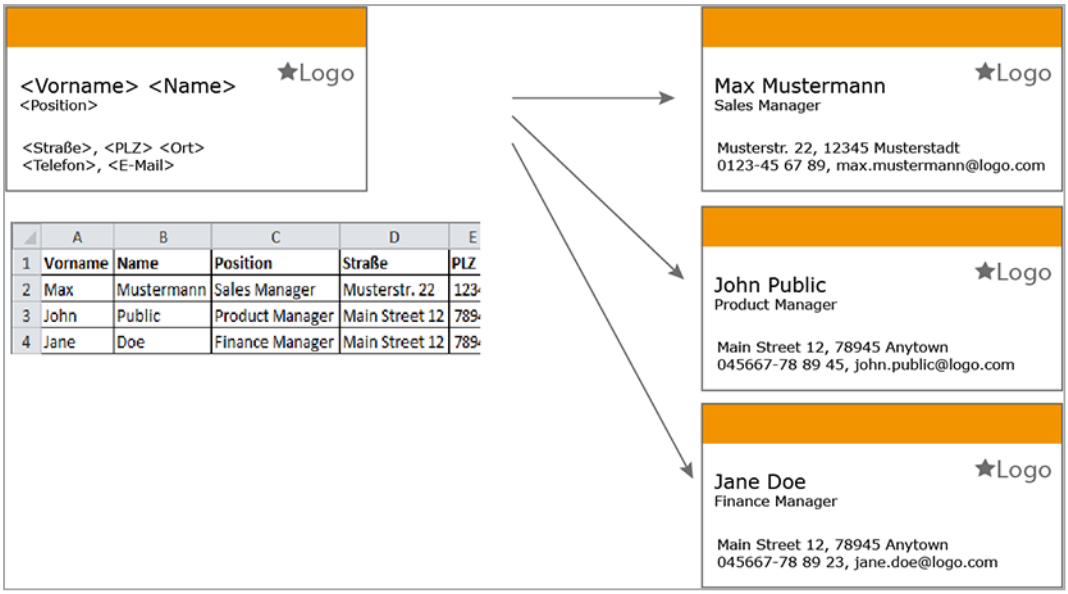
If the height is 335 mm and this corresponds to the maximum non-proportional scaling of 105 %, the resulting proportional scaling is:

The corresponding proportional width is therefore:

To set the maximum height of 335 mm, the document creator must set a width of at least 248.1 mm when the maximum non-proportional scaling is 5%.

4.2.1.1.5 For Mass Customization

This property is a serial letter function. With a basic template for mass customization, the document creator can create multiple documents in which the variable components are filled with data from an Excel file. Typical use cases include address data for a letter or personal data for a business card:



	A	B	C	D	E
1	Vorname	Name	Position	Straße	PLZ
2	Max	Mustermann	Sales Manager	Musterstr. 22	123
3	John	Public	Product Manager	Main Street 12	789
4	Jane	Doe	Finance Manager	Main Street 12	789

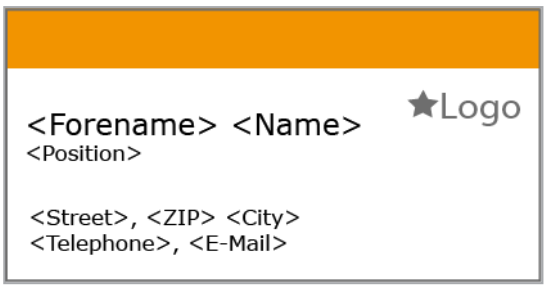
Note

Note that you can use this feature only in single-page templates that cannot be enhanced with Smart Pages or Smart Groups.

Options

Depending on how you create the INDD file, you can choose whether the document creator adds one or more data records per page:

- One data record per page:



- Several data records on one page:

If you want the document creator to add several data records on one page, you can freely organize the distribution of the data records on the page. However, when doing so, you must follow a naming convention when creating the variables:

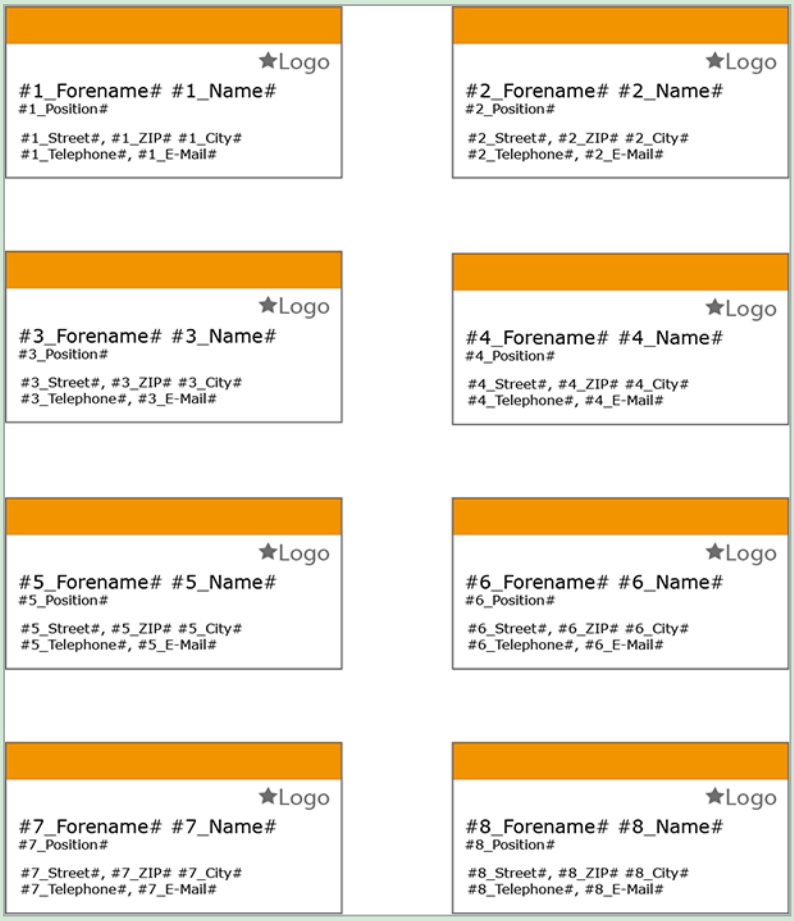
<No. of the data record on this page>_<data name>_<variable counter>

The last part (the counter) is optional.

EXAMPLE

You have created an INDD file containing eight business cards:

If you want to use a new data record for each business card, the variables must be named as follows:



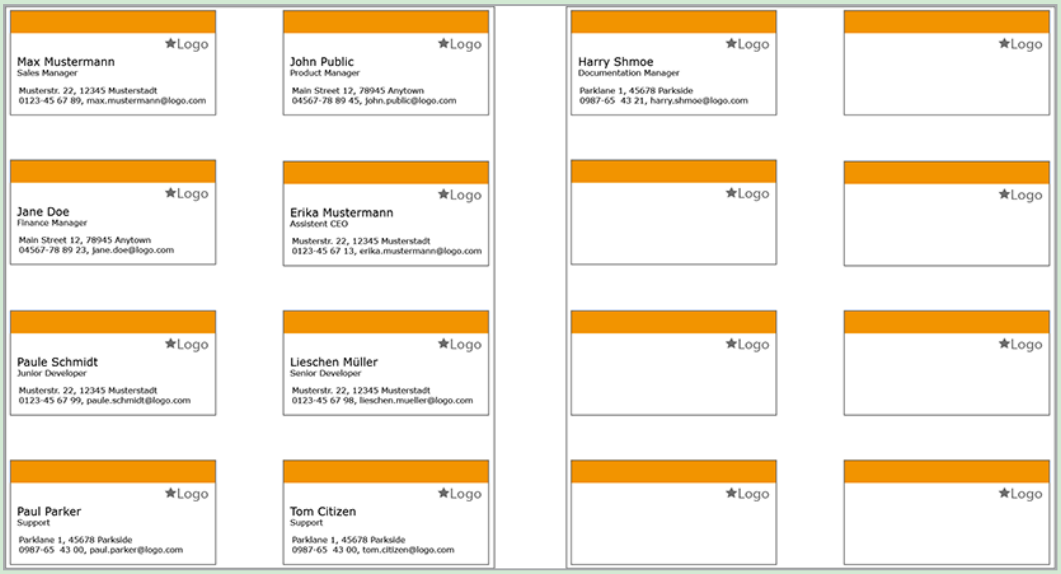
Note

Note that this example uses variables that are added directly in the INDD file and are therefore framed by # (see *Creating a Template File* on page 113). If you only want to add variables while creating the template, see *Configuring a Partly Changeable Text Box* on page 205.

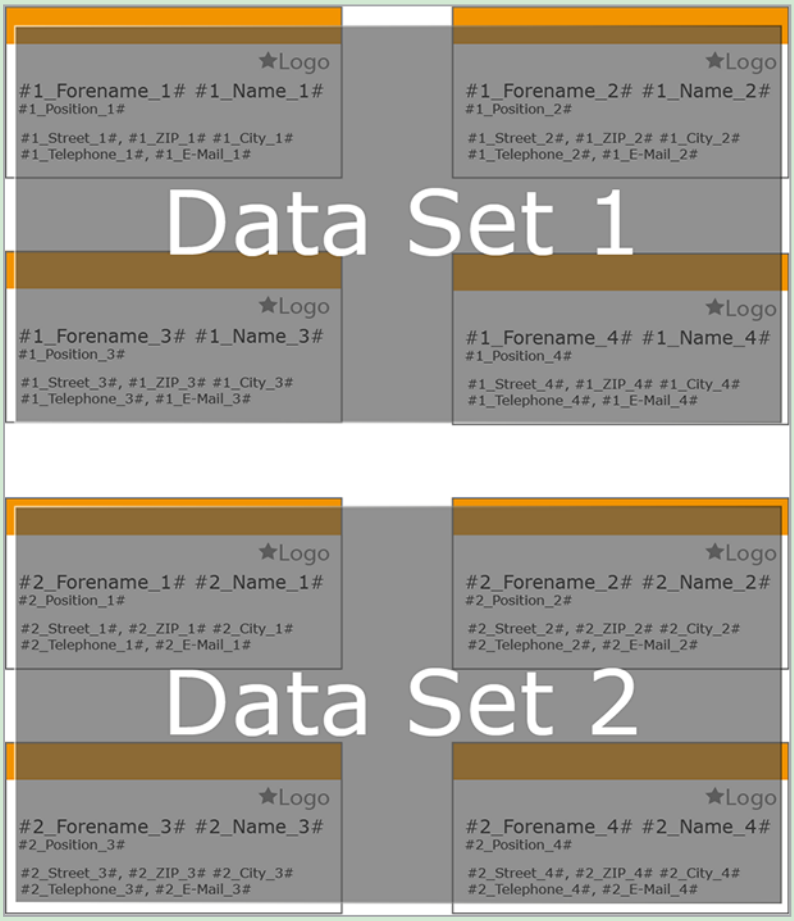
Multiple employees require a business card. The data is created in an Excel list:

	A	B	C	D	E	F	G	H
1	**Forename**	**Name**	**Position**	**Street**	**ZIP**	**City**	**Telephone**	**E-Mail**
2	Max	Mustermann	Sales Manager	Musterstr. 22	12345	Musterstadt	0123-45 67 89	max.mustermann@logo.com
3	John	Public	Product Manager	Main Street 12	78945	Anytown	04567-78 89 45	john.public@logo.com
4	Jane	Doe	Finance Manager	Main Street 12	78945	Anytown	04567-78 89 23	jane.doe@logo.com
5	Erika	Mustermann	Assistent CEO	Musterstr. 22	12345	Musterstadt	0123-45 67 13	erika.mustermann@logo.com
6	Paule	Schmidt	Junior Developer	Musterstr. 22	12345	Musterstadt	0123-45 67 99	paule.schmidt@logo.com
7	Lieschen	Müller	Senior Developer	Musterstr. 22	12345	Musterstadt	0123-45 67 98	lieschen.mueller@logo.com
8	Paul	Parker	Support	Parklane 1	45678	Parkside	0987-65 43 00	paul.parker@logo.com
9	Tom	Citizen	Support	Parklane 1	45678	Parkside	0987-65 43 00	tom.citizen@logo.com
10	Harry	Shmoe	Documentation M	Parklane 1	45678	Parkside	0987-65 43 21	harry.shmoe@logo.com

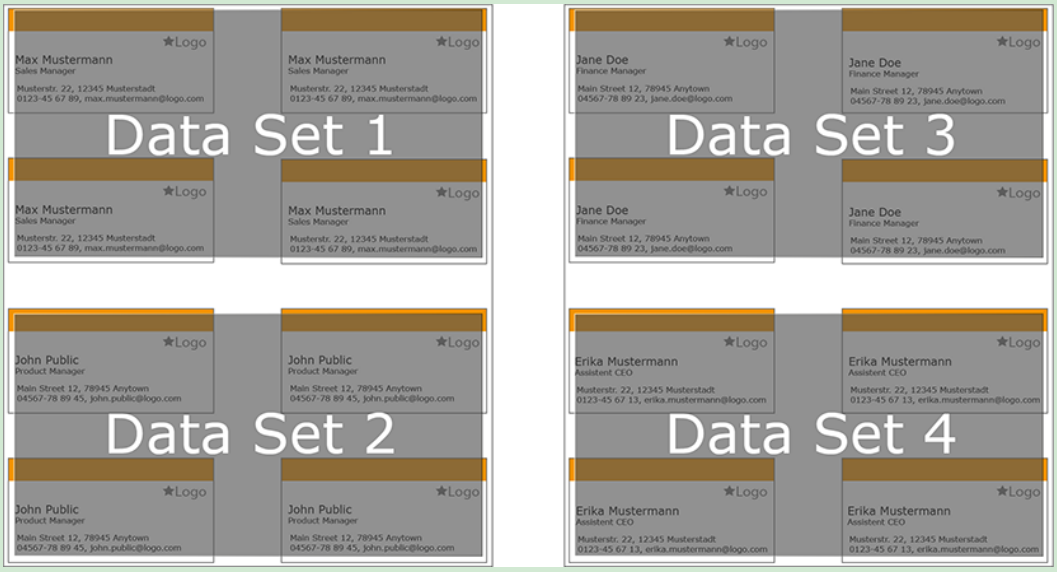
The resulting document is therefore:



Unfortunately, a large amount of space is wasted with this inconvenient divider. You can therefore also use a data record on a page multiple times. The variable names then receive counters with an underscore attached to them:



A document creator uses that as a basis to generate a multi-page document. For the sake of clarity, only the first two lines are shown in this example:



With the Excel list above, the document has five pages. On the fifth page, the lower half of the business card is blank.

Excel List

The document creator requires an Excel list with the correct structure for mass customization. You have two options for supplying this Excel list:

- The document creator generates the list from the variables that are created in the template. This does not require any further entries from you as the template designer.
- If you already know the variables required, you can add an Excel list to the template. Note that the Excel file must contain the structure only, and no data. The file format must be XLSX.

Configuring a Basic Template for Mass Customization

*Prerequisite*You have selected a single-page INDD file. In addition, the template cannot be enhanced with Smart Pages or Smart Groups.

1. Go to step 1 of Template Design.
2. In the *Process* area, select one of the options in the *Mass customization* pick-list.

3. Optional: add an Excel list with the required structure:
    1. Click the *Browse* input field.
    2. In the dialog box that opens, go to the Excel file.
    3. Select the file and choose *Open*.
    4. Then choose *Save* on the Brand Template Builder interface.
4. If the INDD file does not contain variables yet, go to step 3 of Template Design and create the variables. See *Content of Text Boxes* on page 199.

The document creator can apply the mass customization.

4.2.1.2 Defining a *Smart Page* Template Type

To create a Smart Page, you must activate the following checkbox:

- *Add this template to the Smart Page Library.* (*Pages* area in step 1 of Template Design)

To define whether the Smart Page can be enhanced with Smart Groups, see the section *Enhancement with a Smart Group* on page 174.

4.2.1.3 Defining the *Smart Group* Template Type

To create a Smart Page, you must activate the following checkbox:

- *Add this template to the Smart Group Library.* (*Smart Groups* area in step 1 of Template Design)

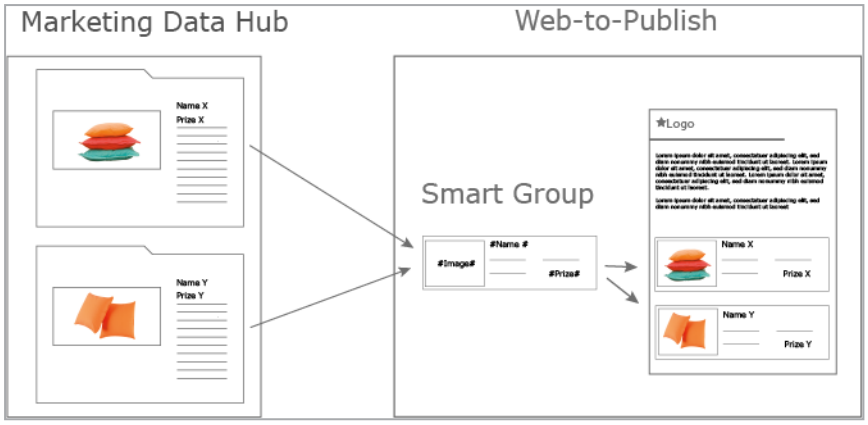
To define more features for a basic template, see the following sections:

- *Scalable* on page 178
- *Connectible with Data Objects* below

You can combine both features with each other.

4.2.1.3.1 Connectible with Data Objects

The only way to connect data from the *Marketing Data Hub* module is with Smart Groups. You use the Smart Groups to load the data to the basic template (a product brochure, for example):



To do so, you must connect the text and image boxes with data in Marketing Data Hub. For more details, see the sections *Content of Text Boxes* on page 199 and *Content of Image Boxes* on page 223.

Handling of Data

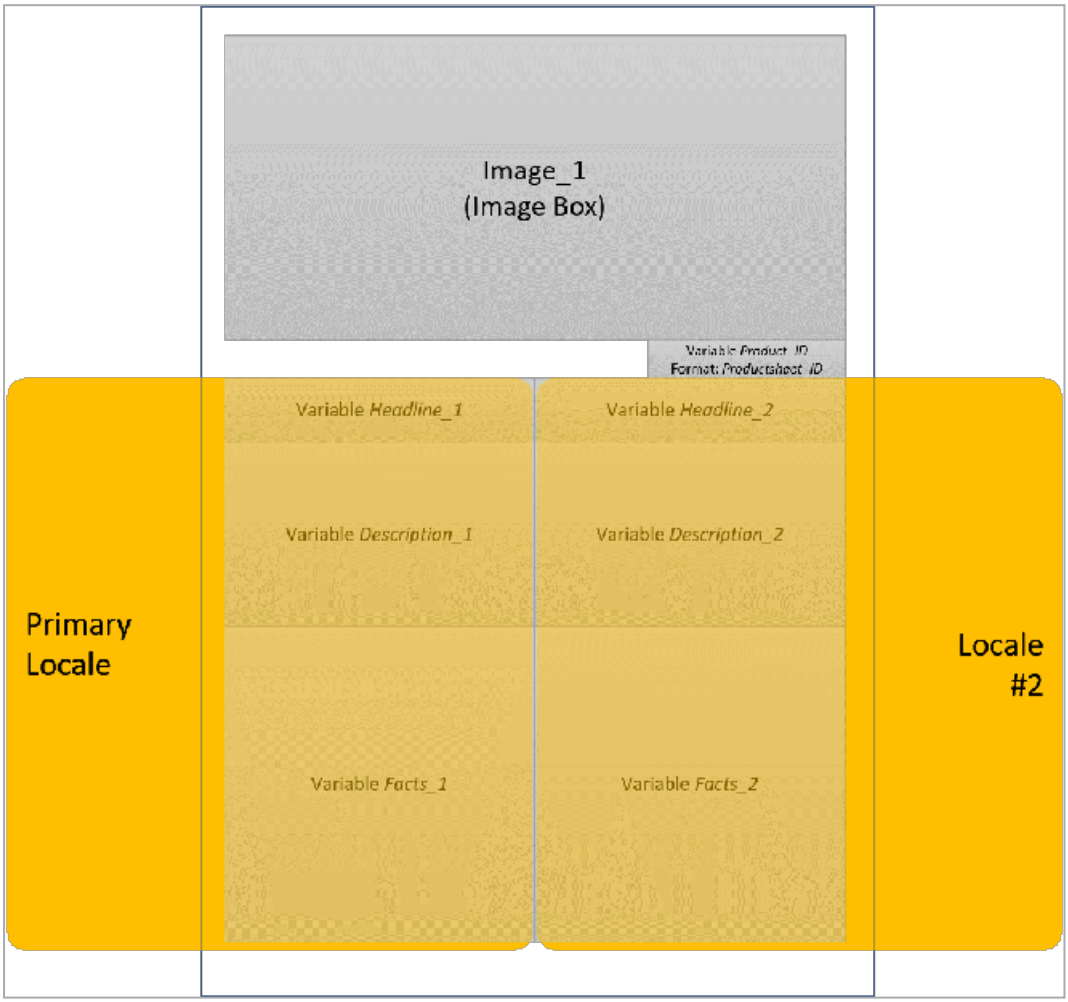
In step 1 of Template Design, you specify how the data is handled:

Field	Description
Connected data object	Choose how data objects from the *Marketing Data Hub* module that are used in the document are updated during customizing. • *Load once*: the information is loaded once when the data object is assigned. When you close the Document Wizard, the system does not check whether the information is still up to date. • *Check for updates*: the information connected in the document is checked for updates when you close the Document Wizard and can be reloaded to the document.
Assign categories for the data object search	If you activate the checkboxes, you link the search on the *Data Object* tab to categories. On the *Data Object* tab, the document creator can then view only the objects that are assigned to these categories and the categories on the *Categories* tab.

4.2.2 Multilingualism

As a designer you have the possibility to structure the variables in the document that are dependent on a locale according to languages. You create templates from which documents with up to 10 languages can be generated.

In the first step you determine how many locales are used in the document. These locales are numbered consecutively: Primary locale, locale #2, locale #3, etc. Then you assign the numbers to the variables, for example a date variable in the main section to the primary locale. In the next section, which should be displayed in a different language, the date variable is assigned to locale #2:



Note

This assignment is only possible for variables whose content depends on a locale: formula, data object or date variables. Other content such as texts must be translated by the document creator, for example, or be provided translated by you as a text alternative.

The document creator decides which locale is used for which number, e.g. primary locale is *United States* and locale #2 is *China*. According to the setting the contents of the variables are calculated or displayed:

Multilingual Smart Groups and Smart Pages

Of course, Smart Groups and Smart Pages can also be created in multiple languages. When inserting, it can happen that Smart Pages or Smart Groups with different numbers of locales are inserted into a document. In these cases, the following rules for merging apply:

- The same number of locales is created in the templates of the document and Smart Group or Smart Group: The locales are used consistently. If the user defines *United States* as the primary locale and *Germany* as locale #2, this is used consistently in the document, Smart Page, and Smart Group.
- A different number of locales is created in the templates of the document, Smart Page or Smart Group: The user chooses the maximum number of locales. The common number is used consistently.

EXAMPLE 1

The template of a document has 4 locales, a Smart Page with 3 and a Smart Group with 2 locales are inserted.

The user selects 4 locales that are used in the document, for example: *United States* (primary), *Germany* (#2), *France* (#3) and *Italy* (#4).
The Smart Page uses *United States* (primary), *Germany* (#2) and *France* (#3), the Smart Group *United States* (primary) and *Germany* (#2).

EXAMPLE 2

The template of a document has 2 locales, a Smart Page with 4 and a Smart Group with 3 locales are inserted.

In this case the user also selects 4 locales, for example: *Unites States* (primary), *Germany* (#2), *France* (#3) and *Italy* (#4).

These are used as follows:

- Document: *Unites States* (primär) and *Germany* (#2)
- Smart Page: *Unites States* (primär), *Germany* (#2), *France* (#3) and *Italy* (#4)
- Smart Group: *Unites States* (primär), *Germany* (#2) and *France* (#3)

Define Amount and Default Locales

1. Switch to step 1 of the template design.
2. Activate the checkbox *Enables configurable locales*.
3. Specify the number of locales required in the *Amount of locales* selection list in the *Document Locales* area.

   Depending on the number selected, one additional *Standard value for ...*selection list is displayed for each locale.
4. Set a default for each locale in the document, for example, *United States* for the primary locale, *Germany* for locale #2, and so on.
5. Under it, define whether the document creator determines the languages when creating the document (radio button *Yes*) or later when entering the document properties (radio button *No*).

You have defined the number and default locales for the template.

Replacement Styles

Typically, fonts do not cover the entire Unicode character set. To use the correct character set for each locale, it is possible to define so-called replacement styles in the administration. Replacement formats are only used with defined locales.

You can find more information in the Administration manual, see *Additional Documentation* on page 424.

Related Tasks

Once you have determined the number of locales, you must assign the locales to the variables. Note the following sections:

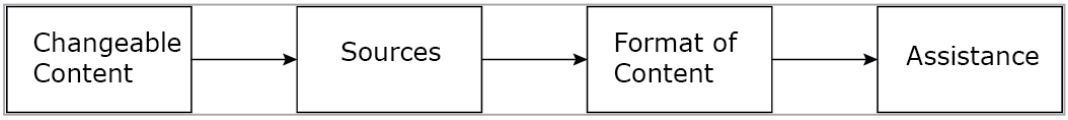
- Data object and formula variable: *Sources for Text Variables* on page 208
- Date variable: *The Format of the Content* on page 215

Next Step

In the next step, configure the content of the boxes, e.g. whether the content can be changed at all or is provided by an external source. Since the configuration of text and image boxes differs considerably, the configuration of text boxes is described first, see *Content of Text Boxes* below. If you would like to go directly to the configuration of image boxes, please read the section *Content of Image Boxes* on page 223.

4.2.3 Content of Text Boxes

You configure text box content editing for the document creator in the following steps:



Which Content Can Be Changed?

In the first step, you define whether a text box is fully or partly changeable. If you do not want a text box or parts of it to be changed, leave the default setting *Not changeable*.

For more information, see the section *Changeable Text Box Content* on the next page.

Source: Who or What Supplies the Content?

In this step, you define who or what fills the text variables that you defined in the first step. You can choose from a variety of sources, such as the entry made by the document creator, centrally maintained tables, or a calculation by a formula. You can also combine various sources with each other.

For more information about configuring and combining sources, see *Sources for Text Variables* on page 208.

Format: How Is the Content Processed and Checked?

Choose whether the content is displayed as text or whether it is a date. In this case, you can specify the country-specific date format in which the content is displayed or has to be entered. For more information, see the section *The Format of the Content* on page 215.

Which Help Tools Provide Support for the Document Creator?

You can support the document creator with various help tools while they edit the document. For example, you can enter help texts with a description of the variables or recommend a text character count for the document creator.

For more information, see the section *Help Tools* on page 216.

Special Features for Threading Text Frames

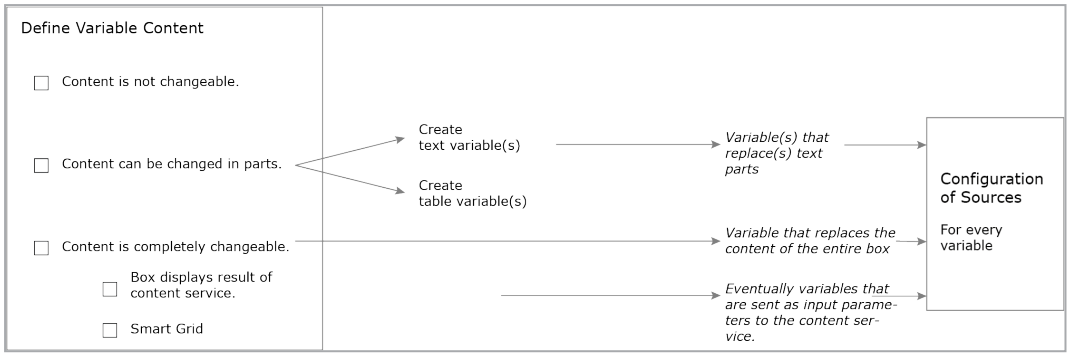
The text in a box can be independent of other boxes or can flow between boxes that are threaded with each other. If the text in a box is independent of other boxes, you can perform the steps above separately for each text box. To allow text to flow from box to box, you must thread the boxes. Note the special features for threading text boxes in the INDD template. You can thread the text frames in the INDD file, or there are some options to add threads in the template. For more information, see *Threaded Text Boxes* on page 219.

Next Step

Once you have configured the settings above for all the text boxes, you have specified how the content of the text boxes can be changed. In the next step, you configure how the content of image boxes can be changed (see the section *Content of Image Boxes* on page 223).

4.2.3.1 Changeable Text Box Content

Choose whether parts or all of the content of a text box are changeable. Create text variables for the changeable content:



The Content of a Text Box Is not Changeable

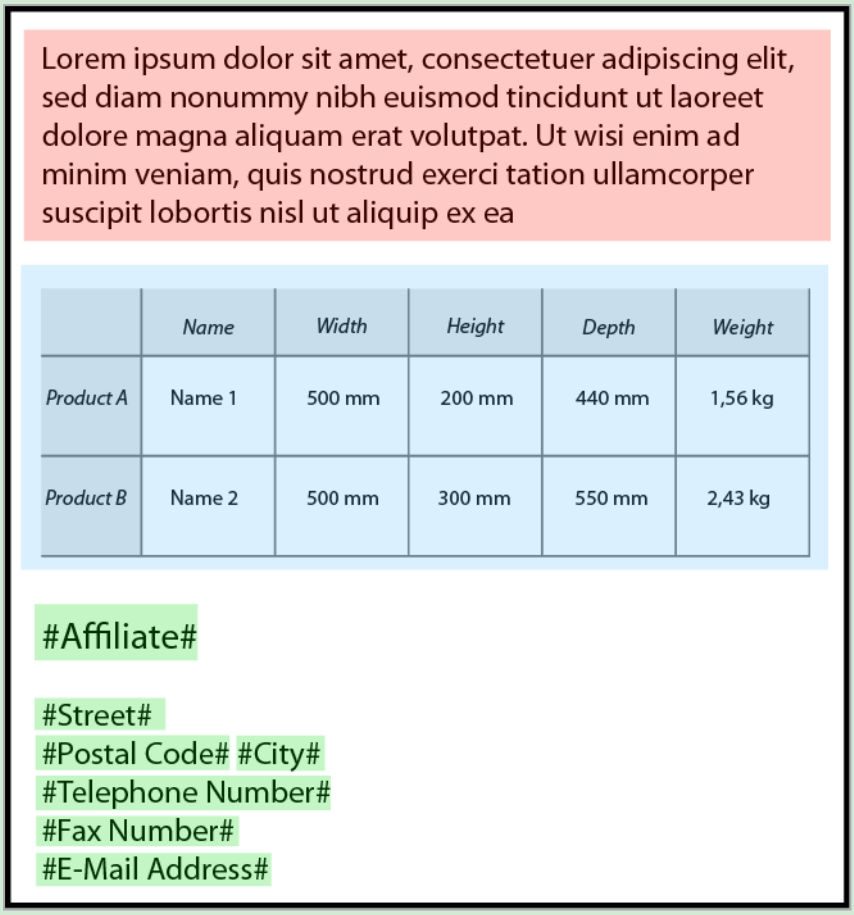
If you do not want the content of a text box to be edited, keep the default setting *Not changeable* in the *Content* area in step 3. You then do not need to perform further work steps for this box. The document creator cannot change the content of the box.

The Content is Partly Changeable

If you want only parts of the content or different parts of the content to be changed in any other way, mark the text box as partly changeable. You then define variables for the various changeable parts.

EXAMPLE

The following graphic shows a partly changeable text box with variables:



The red area cannot be changed; that is, no variables can be created there. The template designer presets the text, and the document creator cannot edit the text.

The blue area is a table that is edited as a table variable by the document creator. For a table variable, you do not configure any settings for sources and you cannot define whether the format is text format or date format. You can only provide help sections in the last step.

The green fields are text variables. For each text variable, you specify and define whether the content is processed as a text or date in the subsequent work steps. You can also add separate help sections for each text variable.

For information about creating a partly changeable text box and creating text and table variables, see *Configuring a Partly Changeable Text Box* on page 205.

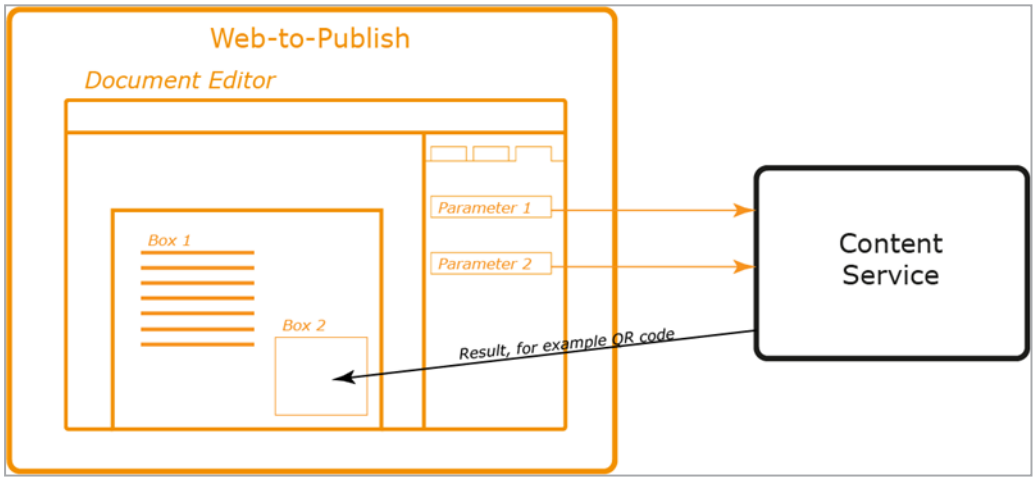
The Content of a Text Box Is Fully Changeable

When you select this setting, the content can be fully replaced. If you do not select one of the options described below, a text variable that the document creator can use to fully change the content of the text box is created automatically. You enter the source for this text variable in the next step.

Alternatively, you can choose one of the following options:

The Text Box Displays the Result of a Content Service

A content service requires input values, which it uses to perform a calculation. The result of the content service is displayed in the text box. The content services are configured and managed by your system administrator (see *Content Service* on page 62).



Depending on the type of content service, the input values can be filled automatically or while creating the document. If the input values are filled while creating the document, text variables are created automatically when you select the content service. You can also configure sources and a format and provide help sections for these text variables.

The Text Box Is a Smart Grid.

Prerequisite

This option can be selected only if you configured the following settings in step 1 of Template Design:

- The template can be enhanced with Smart Groups
- The Smart Groups are placed in the text boxes in the document

For more information, see the section *Enhancement with a Smart Group* on page 174.

In this case, the document creator can only add a Smart Group. All other settings for the sources and format and the help section are omitted for the Smart Grids. However, you can specify the following for the Smart Grid in step 3 of the template design.

- *Support Categories*: If you activate the checkbox, a category must be assigned to the Smart Grid so that the document creator can select the data object. In this case you can also assign a default category as described below.
  If you do not activate the checkbox, only a layout must be assigned to the grid so that the document creator can select a data object.
- *Default category*: Note that only categories are available that are enabled for the *Marketing Data Hub* module and for which an image is stored. When the document is customized, the category is assigned to the Smart Grid, but can be changed on the *Categories* tab. If the *Categories* tab is not visible to the document creator via an appropriate editor setting, the document creator can no longer change the category. In this way you achieve the restriction of the category.
  Note
  You can select a default category only if the check box *Support Categories* is activated.
- *Default layout*: you select a layout from the Smart Group Library with dimensions that fit into the box. In addition, note that only Smart Groups that you approve for the document creator can be selected. You set these restrictions when you configure the template as enhanceable with a Smart Group. For more information, see *Enhancement with a Smart Group* on page 174.
  The default layout is also a pre-assignment that can be changed by the document creator. If the *Layout* tab is not visible to the document creator due to an editor setting, the document creator can no longer change the layout. This allows you to specify the layout.

For more information, see *Configuring a Fully Changeable Text Box* on page 206.

Next Step

In the next step, you specify who or what fills the text variables. See *Sources for Text Variables* on page 208.

4.2.3.1.1 Configuring a Partly Changeable Text Box

If you are configuring a text box as partly changeable, you can create text or table variables.

Configuring a Text Box as Partly Changeable

1. Go to step 3 of Template Design.
2. Choose the text box that you want to be partly changeable. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select the *Partly changeable* setting.

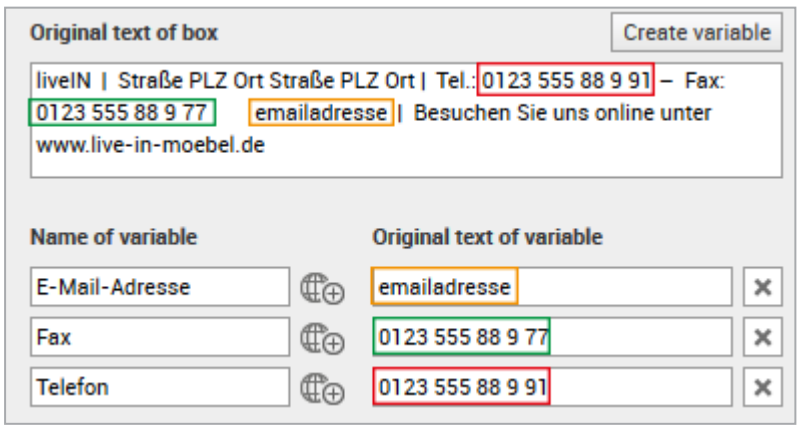
You have marked a text box as partly changeable. The *Create Variable* button is displayed. If the text box contains a table, the *Create Table Variable* button is displayed.

Creating Text Variables

1. In the *Original text of box* field, select the text section that you want to create as a variable.
2. Choose *Create Variable*.

   The *Name of variable* and *Original text of variable* fields are displayed.
3. In the *Name of variable* field, enter a name for the variable (for example, *ZIP code*).
4. Repeat steps 1 to 3 for each additional text variable that you require in the text box.
5. Test the configuration. For more information, see *Test* on page 360.

You have created text variables.



Note

If you already entered the variables, separated by #, in the text boxes while creating the INDD file, Brand Template Builder automatically detects them and adds them to the INDD template (see *Creation* on page 116 of INDD Files).

Configuring a Table Variable

1. Choose *Create table variable*.
2. In the picklist, select the table that you want to create as a table variable.

   The *Name of variable* and *Original text of variable* fields are displayed.
3. In the *Name of variable* field, enter a descriptive name for the table (for example, *Product data*).
4. Repeat steps 1 to 3 for each additional table that you want to create as a variable in the text box.
5. Test the configuration. For more information, see *Test* on page 360.

You have created table variables.

4.2.3.1.2 Configuring a Fully Changeable Text Box

Configuring a Fully Changeable Text Box

1. Go to step 3 of Template Design.
2. Choose the text box that you want to be fully changeable. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select the *Fully changeable* setting.
4. Test the configuration. For more information, see *Test* on page 360.

A text variable is automatically configured for the text box. In the next step, you configure the sources for the text variable (see *Sources for Text Variables* on page 208).

Configuring a Fully Changeable Text Box as the Result of a Content Service

1. Go to step 3 of Template Design.

2. Choose the text box that you want to be fully changeable and that you want to display the result of a content service. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select the *Content Service* setting.
4. Select the content service from the picklist.
5. If you want to allow the document creator to edit the result, activate the checkbox.
6. Test the configuration. For more information, see *Test* on page 360.

The content of the text box is fully replaced by the result of a content service. In the next step, you configure the sources for the text variables that are created for the content service input parameters (see *Sources for Text Variables* on the next page).

Configuring a Fully Changeable Text Box as a Smart Grid

Prerequisite

This option can be selected only if you configured the following settings in step 1 of Template Design:

- The template can be enhanced with Smart Groups
- The Smart Groups are placed in the boxes in the document.

For more information, see the section *Enhancement with a Smart Group* on page 174.

1. Go to step 3 of Template Design.
2. Choose the text box that you want to configure as a Smart Grid. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select the *Smart Grid* setting.
4. If you want to pre-assign the Smart Grid with a category:
    1. In the *Categories* area, choose *Select*.
    2. Select a category in the dialog box that opens.
    3. Choose *Apply*.
5. If you want to pre-assign the Smart Grid with a layout:
    1. In the *Layout* area, choose *Select*.
    2. Select a layout in the dialog box that opens.

3. Choose *Apply*.

6. Test the configuration. For more information, see *Test* on page 360.

You have created the text box as a Smart Grid. No other settings are required for the text box. If you want to configure content for other text boxes or image boxes, see *Content of Image Boxes* on page 223.

4.2.3.2 Sources for Text Variables

In this step, you define who or what fills the text variables that you defined in the first step. You can choose from a variety of sources, such as the entry made by the document creator, centrally maintained tables, or a calculation by a formula. You can also combine various sources with each other.

Free Entry by the Document Creator

In this case, the actual document creator can create content.

1. Go to step 4 of Template Design.
2. Choose the variable that you want the document creator to freely edit. See *Box and Variable Navigation* on page 416.
3. Ensure that the *Edit and alternative elements* setting is selected in the *Editing options* list.
4. Ensure that none of the *Alternative texts* are activated.
5. Test the configuration. See *Test* on page 360.

The document creator can enter content in the variable.

Default Alternatives Set by the Template Designer

As the template designer, you can specify default alternative content that the document creator can only choose from.

1. Go to step 2 of Template Design.
2. In the *Alternative texts* area, add the alternative content in the *New text content* free text field.
3. Click the arrow button .

   The content is created as an *Alternative text*.
4. Repeat steps 2 to 3 for all the alternatives that you want to make available to the document creator for selection.
5. Go to step 4 of Template Design.

6. Choose the variable to which you want to assign the alternative content. See *Box and Variable Navigation* on page 416.
7. In the *Editing options* list, select *Predefined images only*.
8. In the *Alternative texts* area, activate the checkboxes of the texts that you want to make available for the document creator to select for this variable.
9. Test the configuration. See *Test* on page 360.

You have created alternative content for the variable and made it available to the document creator for selection.

Combination of a Free Entry and Default Alternatives

In this case, you set the default alternatives but also allow editing by the document creator.

1. Go to step 2 of Template Design.
2. In the *Alternative texts* area, add the alternative content in the *New text content* free text field.
3. Click the arrow button .

   The content is created as an *Alternative text*.
4. Repeat steps 2 to 3 for all the alternatives that you want to make available to the document creator for selection.
5. Go to step 4 of Template Design.
6. Choose the variable to which you want to assign the alternative content. See *Box and Variable Navigation* on page 416.
7. In the *Editing options* list, select *Edit and alternative elements*.
8. In the *Alternative texts* area, activate the checkboxes of the texts that you want to make available for the document creator to select for this variable.
9. Test the configuration. See *Test* on page 360.

The variable can be edited by the document creator, who can also select from your predefined content.

Centrally Maintained Content from a Custom Structure

You choose *Custom Structure* to define a table as a source. The table is maintained centrally in the system. You also choose the attribute (that is, the table column) and therefore the type of value (for example, the *Weight*). The document creator chooses the line (for example, *product A*), and its weight of *1.2 kg* is displayed in

the variables.

*Prerequisite*You have created a dropdown that is linked to a custom structure. For more information, see *Dropdowns* on page 353.

1. Go to step 4 of Template Design.
2. Choose the variable that you want the custom structure to fill. See *Box and Variable Navigation* on page 416.
3. On the *Apply structure and attribute:* input field, choose the button.

   The *Template Dropdowns* dialog box is displayed.
4. Select the template that you want to use as the source.
5. Select the attribute (i.e. the column) from which the value should be taken.
6. Choose *Apply and close window*.
7. In the *Editing options* list, select *Hide*.
8. Test the configuration. See *Test* on page 360.

The document creator can only choose a value from the custom structure. The value is displayed in the document after you refresh it.

Note

You can also specify that the document creator can choose between alternatives and enter content himself or herself. See the section *Combinations* on page 215.

User Data Available in the System

With this source, the variables are filled using the system data available to the document creator. This data includes:

- User data
  - Address
  - First name
  - Last name
  - E-mail address
  - Organizational unit

- User delivery address:
  - Street
  - Street number
  - Optional address information, field 1
  - Optional address information, field 2
  - ZIP code
  - City
  - State
  - Country

With the exception of the e-mail address and organizational unit, the user can edit the data under *> Your user name*.

EXAMPLE

You are setting up a template for a business card with one variable each to be filled with the system data *Last name* and *First name*. This should make it easy for the user to fill in his or her own business card.
When your colleague Jane Public creates a document from the template, her name will be entered.

1. Go to step 4 of Template Design.
2. Choose the variable that you want the system data to fill. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select *System Data*.

   The *System data* field is displayed below the radio button.
4. Click the arrow button next to the *System data* field.
5. A list is displayed.
6. In the list, select the system data whose value you want to display in the variable.
7. The system data is displayed in the field.
8. In the *Editing options* list, select *Hide*.
9. Test the configuration. See *Test* on page 360.

The value from the system data for the relevant document creator is displayed in the document after it is refreshed. The document creator cannot change the value.

Note

You can also specify that the document creator can choose between alternatives and enter content himself or herself. See the section *Combinations* on page 215.

Centrally Maintained Object Data from the Marketing Data Hub Module

*Prerequisite*The template is a Smart Group. For more information, see *Template Type* on page 167.

With this source, the content is supplied by data objects. As the template designer, you specify which type of data object the document creator can choose and which attribute (that is, which value) can be displayed in the variables (for example, *Size*, *Weight*, or *Color*. The document creator selects a specific data object, whose value is then loaded for the selected attribute (for example, *50 x 60 x 20 mm*, *500 g* or *silver metallic*).

1. Go to step 4 of Template Design.
2. Choose the variable that you want to fill with a value from a data object. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select *Marketing Data Hub attribute*.
4. In the *Data object type* list, select the type of objects whose data is to be queried.
5. In the *Data object attribute* list, select the attribute whose value you want to display. Examples of an attribute include the *Item number*, *Size*, or *Color*.

   If the attribute is a localized attribute, the *Locale* field is displayed.
6. In the *Locale* field, choose:
   - *Primary Locale* (Default setting):
     - Monolingual template: The localized value of the locale chosen by the document creator for the document is used.
     - Multilingual template: In the document, the variable uses the localized value of the locale that the document creator specifies as the primary locale.
   - *Locale #2, #3* etc. (only for multilingual templates): In the document, the variable uses the localized value of the locale that the document creator set as locale #2, #3 etc.

- Any other locale: The document will always use the localized value of your chosen locale. The choice of a locale for the document, single or multilingual, has no effect.

7. In the *Editing options* list, select *Hide*.
8. Test the configuration. See *Test* on page 360.

The document creator chooses a data object. Its value for this attribute (*Item number*, *Size*, or *Color*) is displayed in the document after the document is refreshed.

Note

You can also specify that the document creator can choose between alternatives and enter content himself or herself. See the section *Combinations* on page 215.

Formula

In this case, the content of a variable is supplied by a formula. This includes mathematical formulas and the possibility to merge the text from other text boxes in the variable. If the variable shows the result of a mathematical formula, the result is always shown with two decimal places, rounded if necessary.

Note that you cannot combine this source with other sources. Furthermore, the result displayed is always rounded to two decimal places where applicable.

1. Go to step 4 of Template Design.
2. Choose the variable that you want the formula to fill. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select *Formula*.

   The *Formula description* field is displayed below the radio button.
4. Enter the formula in the field. Refer to the description below.
5. In the *Locale* field, choose the country-specific number format to be used to display the result:
   - *Primary Locale*:
     - Monolingual template: If the document creator specifies the locale of the document, e.g. *United States*, the number format of this locale is used, in the example 1,000,000.00.

    - Multilingual template: In the document, the variable uses the number format of the locale that the document creator specifies as the primary locale.
  - *Locale #2, #3* etc. (only for multilingual templates): In the document, the variable uses the number format of the locale that the document creator set as locale #2, #3 etc.
  - Any other locale: The variable will always use the localized value of your chosen locale. The choice of a locale for the document, single or multilingual, has no effect.
6. Test the configuration. See *Test* on page 360.

The variable displays the result of the formula in the selected format with two decimal places.

Entering the Formula

You can enter formulas as follows:

- The characters +, -, *, and / are permitted.
- You can structure expressions using brackets ().
- You can enter numbers.
- You can add other variables. Click the arrow button for a list of the available variables, sorted into pages where necessary.

EXAMPLE

You want to display a net price in a variable. You use a custom structure to provide the gross price in a a different variable. 2.5 % is to be deducted from the gross price.

1. First, link the variable that you want to contain the gross price with the custom structure and its *Gross price* column.
2. In step 4 of Template Design, choose the variable that you want to display the net price.
3. Select the *Formula* source.
4. In the formula field, use the arrow button to select the variable containing the gross price and multiply it by 0.975.

The variable displays the net price with two decimal places.

Combinations

If you are filling variables with a formula, you cannot use another source.

Furthermore, you cannot combine the *Data Objects* and *Custom Structure* sources with each other.

However, you have the option of replacing the value, system data, a data object attribute, or a custom structure either with an entry made by the document creator or with your alternatives or your combination. The step in which you select *Hide* in the *Editing options* list is then omitted from the instructions. Instead, carry out the instruction that either activates the entry made by the document creator, the replacement with your alternatives, or both.
If you want to include the entry made by the document creator in a combination, you can also enter a default text. When using system data, note that the default text is visible only if the document creator has not filled the system data (for example, when the delivery address is empty).

Next Step

You then choose whether the entered or supplied value is a text or a date (see the section *The Format of the Content* below). If you have configured the *Formula* source, this step is omitted and you can set up *Help Tools* on the next page for the document creator directly.

4.2.3.3 The Format of the Content

You specify the format of the variable value, either as *text* or a *date*.

Note

The *Number* format is available only if the source of the variable is a formula. For more information, see the section *Sources for Text Variables* on page 208. In this case, you can skip this step and go directly to the configuration of the help tools for the document creator (see *Help Tools* on the next page).

You define the content type in the *Content* area in step 4 of Template Design. You choose between the following types:

- *Text*: the content is a text and is displayed without a format check.
- *Date*: the content is a date. You can configure a pre-assigned date and the date format.
    - *Pre-assignment*: click below the radio buttons to select the date in a calendar view.

- *Date format*: you specify the format in which the document creator must enter the date in the *Locale* picklist below the radio buttons:
  - *Primary Locale*:
    - Monolingual template: If the document creator specifies the locale of the document, for example *United States*, the date format of this locale is used, in the example *mm.d-d.yyyy*.
    - Multilingual template: In the document, the variable uses the date format of the locale that the document creator specifies as the primary locale.
  - *Locale #2, #3* etc. (only for multilingual templates): In the document, the variable uses the date format of the locale that the document creator set as locale #2, #3 etc.
  - Any other setting: The date is displayed in the format you specify. Choosing a locale for the document, mono- or multilingual, has no effect.

Next Step

In the next step, you configure the help tools to make it easier for the document creator to edit the variables. See the section *Help Tools* below.

4.2.3.4 Help Tools

This section explains which help tools you can provide for the document creator while they edit the text box content.

Note

If you want to control the display of multiple input fields for variables in the document editor, see the section *Advanced Layout* on page 293.

The following options for providing help tools are available to you:

Help Text

Enter a description of the text variables in the *Help text* field in step 4 of Template Design. For example, you can inform the document creator about which type of content is to be entered in the variable. This allows you to make it easier for the document creator to edit the variables.

Processing Order for Fields

If you want to recommend a processing order for the document creator, define the *Position of the input box*. Enter a numerical value in the field in step 4 of Template Design. The fields containing the lowest value are displayed at the top of the *Content* tab in the document editor.

Note

This function is unavailable if you are using an advanced layout on the page. For more detailed information, see *Advanced Layout* on page 293.

Mandatory Field

If you activate the *Mandatory field* checkbox for a text variable in step 4 of Template Design, the variable must be filled by the document creator. If you do not activate the checkbox, the document creator can finish editing the document even though the field is empty.

Adding Unchangeable Components

You can specify a prefix or suffix for text variables. The prefix or suffix is automatically added before or after the text if the document creator enters a value in the variable. For example, you can define that the prefix *Tel.* must always be entered before a telephone number. If the document creator does not enter the telephone number, no unnecessary *Tel.* prefix is displayed.

Checking the Content

Two features are provided for you to check the filled content:

Rules

Document creators frequently have to enter telephone numbers or e-mail addresses. To ensure that the entries are correct, you can define a validation and replacement rule.

One rule each for telephone numbers and e-mail addresses are available as predefined rules.

To create a rule, proceed as follows:

1. Click *Customize Rule*.

   The *Validator and Beautifier Rules* dialog is displayed.

2. Enter a regular expression for the validation in the *Rule* field.
3. In the *Message* field, enter a short and concise description as information for the document creator. Click the globe icon to enter the message in different languages.
4. If you want to have automatic correction made, click the *New Rule* button in the *Beautifier* section.

   The *Beautifier* dialog is displayed.
5. Enter one regular expression each for the search rule and the replacement.
6. Click *Save*.
7. Repeat steps 4 to 6 if necessary.
8. Click *Save* to save your entries.

You have created a rule.

Recommended Character Count of Text

> Note
>
> This function is available only if the content is displayed in the *Text* format (see *The Format of the Content* on page 215).

Enter a value for the recommended text quantity. If you enter a value, a warning message is displayed if the user exceeds this character count. The user can ignore the warning.

Functions for Editing the Content

> Note
>
> This function is available only if the content is displayed in the *Text* format (see *The Format of the Content* on page 215).

Select an editor configuration from the *Editor* picklist. This lets you specify which editing functions are available to the document creator while editing the text (e.g. *Bold* and *Italics* text formatting or special characters). If you have any questions, please contact the responsible module or system administrator that manages the editor configurations.

The configurations *Simple text (one paragraph)* and *Simple text (several paragraphs)* allow the document creator to enter text without formatting. In the case of *Simple text (one paragraph)*, the system interprets the entry of a return as a soft return. The editor *Simple text (several paragraphs)* interprets the entry of a return as a hard return.

Remove Empty Line

> **Note**
>
> This function is available only for text variables that you created in a partly changeable box.

If you activate this checkbox, empty lines are removed in text variables if the variables remain empty. An example of this is a second address line on a business card.

Height of the Input Box

> **Note**
>
> This function is unavailable if you are using an advanced layout on the page. For more detailed information, see *Advanced Layout* on page 293.

Define a value for the height of the input field on the *Content* tab in the document editor (for example, three lines). You make an entry to adapt the field in which the default text is displayed and therefore improve the display.

Next Step

After defining the help tools, you have completed the configuration of the content of the text boxes. In the next step, you configure the content of the image boxes (see the section *Content of Image Boxes* on page 223).

4.2.3.5 Threaded Text Boxes

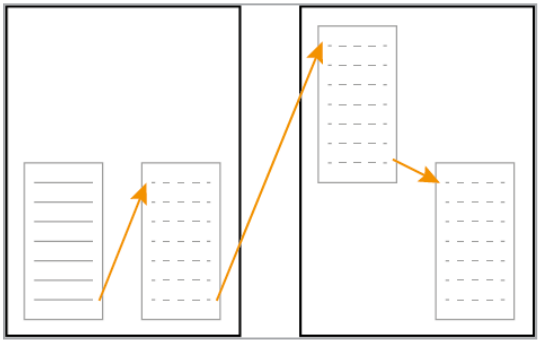
The text in a box can be independent of other boxes or can flow between boxes that are threaded with each other. To allow text to flow from box to box, you must thread the boxes. You can thread the text boxes in the INDD file, or there are some options to add threads in the template.

Attention!

Design the template so that each box is threaded a maximum of one time, either in the INDD file or in Template Design. Multiple use is not possible. See also *Creation* on page 116.

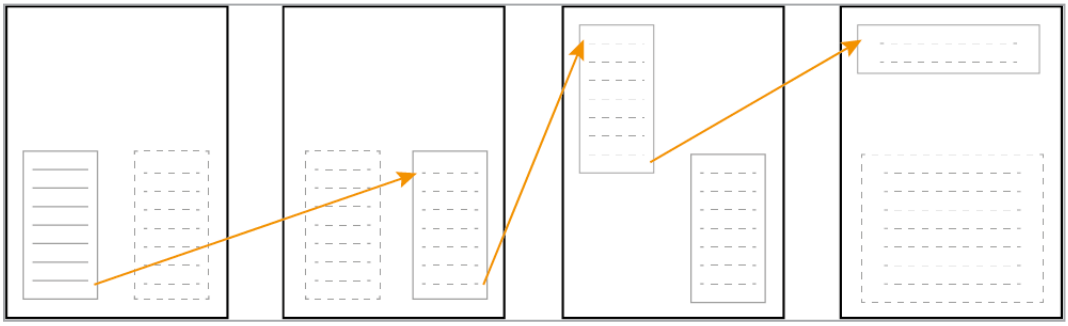
Threading in the INDD File

If you set up threading in the INDD file, you can configure a text flow according to the InDesign logic. The text flow is mapped and used in the template in Brand Template Builder. You edit the start box (in the example below: the left text box) in the template and define the variable text section, the source, the format of the content, or help sections for the overall text flow here; for all other text boxes in the text flow, leave the setting as *Not changeable* (in the example below: the boxes to which the arrows are pointing).



Threading in Template Design

If you set up threading in Template Design, you can thread only from one box to a box on the subsequent page:



The threading begins in the start box, which must be a fully changeable text box. The threading is automatically continued for as long as continuation boxes are detected on the subsequent pages. At the last continuation box or if a start box is detected on one of the subsequent pages, the current threading ends automatically.

You can use this function if you allow Smart Pages to be added in a basic template and want to configure a text flow to one or more Smart Pages. In this case, the start box is in the basic template and the basic template must be allowed to be enhanced with Smart Pages (see *Defining the Basic Template Type* on page 173). A non-changeable text box must be selected as a continuation box in the Smart Page.

Note that you can enter a recommended text quantity for each box (start box and all continuation boxes). While creating the document, the document creator can then view the recommended text quantity for the threading, which is based on the total recommended text quantity for the start box and all the continuation boxes.

Associated Tasks

- *Configuring the Change Options for a Thread Created in the INDD File* below
- *Threading Boxes in Template Design* on the next page

4.2.3.5.1 Configuring the Change Options for a Thread Created in the INDD File

1. Go to step 3 of Template Design.
2. Select the text box that is the start box for the text flow. See *Box and Variable Navigation* on page 416.
3. Configure the following items for the thread in the same way as for non-threaded text boxes:
    1. *Changeable Text Box Content* on page 200
    2. *Sources for Text Variables* on page 208
    3. *The Format of the Content* on page 215
    4. *Help Tools* on page 216
4. Ensure that the other text boxes for the text flow are set to *Not changeable* in step 3 of Template Design.
5. Test the configuration. See *Test* on page 360.

You have configured the change options for the text flow in the template. The document creator can enter text in the start box; if the space for the text in the start box is insufficient, the overflow text is displayed in the continuation boxes.

4.2.3.5.2 Threading Boxes in Template Design

> **Note**
>
> If you want to set up the threading of a basic template for a Smart Page, the start box must be in the basic template and it must be possible to enhance the basic template with Smart Pages (see *Defining the Basic Template Type* on page 173). A non-changeable text box must be selected as a continuation box in the Smart Page.

1. Go to step 3 of Template Design.
2. Select the text box that is the start box for the text flow. See *Box and Variable Navigation* on page 416.
3. Mark the start box as *Fully changeable*.
4. Go to the next box.
5. In the *Thread of Text Boxes* area, choose .

   Two picklists are displayed.
6. In the *Start box* picklist (top picklist), select the start box.
7. Optional:
   1. Go to step 4 of Template Design and select the start box.
   2. In the picklist *Recommended character count of text*, enter a character count.
8. Go to the box that continues the text flow in step 3 of Template Design.

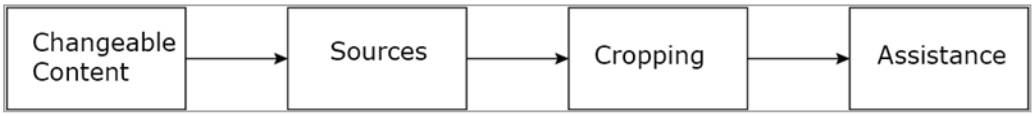
   Note: note that the continuation box can be placed in both the same template and a different template.
9. Ensure that the continuation box is marked as *Not changeable*.
10. In the *Thread of Text Boxes* area, choose .

    Two picklists are displayed.
11. In the picklist *Continuation box for start box of previous page* (bottom picklist), select the continuation box.
12. Optional: enter a character count in the picklist *Recommended character count of text for continuation box*.
13. *Test* on page 360 your settings. Note that to do so, you must open the template with the start box if the start and continuation box are in different templates.

You have threaded text boxes in the template. The document creator can enter text in the start box; if the space for the text in the start box is insufficient, the overflow text is displayed in the continuation box. If you use this option, the total of the recommended character counts for the start box and the threaded continuation box is displayed as the recommended character count.

4.2.4 Content of Image Boxes

You configure image box content editing for the document creator in the following steps:



Which Content Can Be Changed?

When using image boxes, you can choose whether the box is not changeable or fully changeable. If the image box is fully changeable, the box can be defined as a Smart Grid or can show the result of a content service. If you do not want a text box to be changed, leave the default setting *Not changeable*.

For more information, see the section *Changeable Image Box Content* on the next page.

Source: Who or What Supplies the Image or Selects the Image?

Choose who or what selects or supplies the image. You choose between different sources; for example, you can let the document creator freely select from the images that he or she can access in the Media Pool or the image can be loaded from the data objects in the *Marketing Data Hub* module. You can combine the various sources with each other.

For more information about configuring and combining sources, see *Sources for Image Variables* on page 228.

Which Section of the Image Is Displayed?

Choose which image section is displayed and whether the document creator can change the displayed section of the image. For more information, see the section *Image Section* on page 234.

Which Help Tools Provide Support for the Document Creator?

You can support the document creator with various help tools. For example, you can enter help texts with a description of the image box or recommend a processing order for the document creator. For more information, see the section *Help Tools* on page 236.

Next Step

Once you have configured the settings above for all the image boxes, you have specified how the content of the image boxes can be changed. In the next step, you can configure variants (see *Variants* on page 238). If you do not require variants, you define how the *Displaying Text and Image Boxes* on page 247.

4.2.4.1 Changeable Image Box Content

Choose whether the content of an image box is changeable.

The Content of an Image Box is Not Changeable

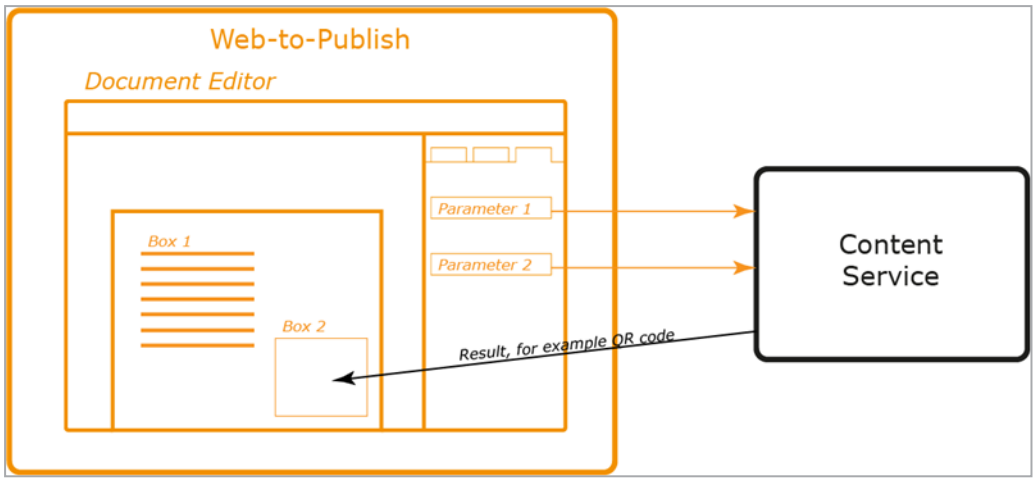
If you do not want the content of an image box to be edited, keep the default setting *Not changeable* in the *Content* area in step 3. You then do not need to perform further work steps for this box. The document creator cannot change the content of the box.

The Content of an Image Box is Fully Changeable

When you select this setting, the content can be fully replaced. You then define an image variable for which you configure the source in the next step. Alternatively, you can choose one of the following options:

The Image Box Displays the Result of a Content Service

A content service requires input values, which it uses to perform a calculation. The result is displayed in the image box. The content services are configured and managed by your system administrator.



Depending on the type of content service, the input values can be filled automatically or while creating the document. If the input values are filled while creating the document, this results in input variables when you select the external service. You can configure sources and a format and provide help sections for the input variables in the same way as for any text variable. See the last three steps in *Content of Text Boxes* on page 199.

The Image Box is a Smart Grid.

Prerequisite

This option can be selected only if you configured the following settings in step 1 of Template Design:

- The template can be enhanced with Smart Groups
- The Smart Groups are placed in the text boxes in the document

For more information, see the section *Enhancement with a Smart Group* on page 174.

In this case, the document creator can only add a Smart Group. All other settings for the sources and format and the help section are omitted for the Smart Grids. However, you can specify the following for the Smart Grid in step 3 of the template design:

- *Support Categories*: If you activate the checkbox, a category must be assigned to the Smart Grid so that the document creator can select the data object. In this case you can also assign a default category as described below.
  If you do not activate the checkbox, only a layout must be assigned to the grid so that the document creator can select a data object.

- *Default Category*: Note that only categories are available that are enabled for the *Marketing Data Hub* module and for which an image is stored. When the document is customized, the category is assigned to the Smart Grid, but can be changed on the *Categories* tab. If the *Categories* tab is not visible to the document creator via an appropriate editor setting, the document creator can no longer change the category. In this way you achieve the restriction of the category.
  Note
  You can select a default category only if the check box *Support Categories* is activated.
- *Default Layout*: You select a layout from the Smart Group Library that fits in the box with its dimensions. Note that you can also only select Smart Groups that you allow for the document creator. You define such restrictions when you set up the template as extendable by Smart Groups. For more information, see *Enhancement with a Smart Group* on page 174.
  The default layout is also a preassignment that can be changed by the document creator. If the *Layout* tab page is not visible to the document creator using an appropriate editor setting, the document creator cannot change the layout. In this way you achieve the restriction of the category.

For more information, see *Configuring a Fully Changeable Image Box* below.

Next Step

In the next step, you specify who or what fills the variables. See *Sources for Image Variables* on page 228.

4.2.4.1.1 Configuring a Fully Changeable Image Box

Configuring a Fully Changeable Image Box

1. Go to step 3 of Template Design.
2. Choose the image box that you want to be fully changeable. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select the *Fully changeable* setting.
4. Test the configuration. See *Test* on page 360.

The image box is fully changeable. If the document creator edits the variable, the box image is replaced. In the next step, configure the source (see *Sources for Image Variables* on page 228).

Configuring a Fully Changeable Image Box as the Result of a Content Service

1. Go to step 3 of Template Design.
2. Choose the image box that you want to be fully changeable and that you want to display the result of a content service. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select the *Content Service* setting.
4. Select the content service from the picklist.
5. Test the configuration. See *Test* on page 360.

The content of the image box is fully replaced by the result of a content service. In the next step, you configure the sources for the input variables (see *Sources for Image Variables* on the next page or *Sources for Text Variables* on page 208).

Configuring a Fully Changeable Image Box as a Smart Grid

Prerequisite

This option can be selected only if you configured the following settings in step 1 of Template Design:

- The template can be enhanced with Smart Groups.
- The Smart Groups are placed in the boxes in the document.

For more information, see the section *Enhancement with a Smart Group* on page 174.

1. Go to step 3 of Template Design.
2. Choose the image box that you want to configure as a Smart Grid. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select the *Smart Grid* setting.
4. If you want to specify a category for the document creator:
    1. Choose *Select Category*.
    2. Select a category in the dialog box that opens.
    3. Choose *Apply*.
5. Test the configuration. See *Test* on page 360.

You have created the image box as a Smart Grid. No other settings are required for the text box. Configure the content of other image boxes.

Note

If you specify a category for the document creator, the category is used as a pre-assignment: the document creator can change the category. If you do not want the document creator to change your pre-assignment, specify an editor preset in which the *Categories* tab is no longer visible. Note that no Smart Grid pre-assignment can be changed in the document. For more information, see the section *Document Editor* on page 50.

4.2.4.2 Sources for Image Variables

In this step, you define who or what fills the image variables.

Free Selection by the Document Creator

In this case, the document creator selects images from the Media Pool or imports images. The document creator can choose from all the images available to him or her in the Media Pool. The document creator can also access his or her favorites or previously imported images through a quick access feature. With this setting, you grant the document creator the greatest possible amount of design freedom.

1. Go to step 4 of Template Design.
2. Choose the image variable for which you want the document creator to be able to freely select images. See *Box and Variable Navigation* on page 416.
3. Ensure that one of the *Predefined and additional images* settings is selected in the *Editing options* list. You choose whether the user can select the section in the next step (see *Image Section* on page 234).
4. Ensure that none of the *Alternative images* are activated.
5. Ensure that the checkbox *Use search string for search in Media Pool* is deactivated.
6. Ensure that the *Search string for images* and *Image affiliate ID* fields are empty.
7. Test the configuration. See *Test* on page 360.

With the appropriate access authorization, the document creator can upload images from the Media Pool to the image variable. When doing so, the visibility of the images is not restricted by search strings or an affiliate ID. Furthermore, the document creator can upload images saved outside of the system to the document.

Alternatives from the Media Pool, Selected by the Template Designer

As the template designer, you can specify alternative images for the document creator to choose from. This feature allows you to restrict the selection options for the document creator to a small number of specific options. However, you can also use alternatives to make images that the document creator cannot access in the Media Pool visible to the document creator. You may have to do so if the document creator has no access to the Media Pool or VDB in which the required assets are stored.

Note

When selecting alternative images, ensure that the size, page ratio, and dpi amount of the individual images match the template. The Media Pool property *Suitable for Brand Template Builder* must be activated. You can select a *Image Section* on page 234 in step 4 of Template Design.

Note

In Brand Template Builder, image files that are compressed as progressive JPEGs take much longer to render than image files that are compressed as Baseline JPEGs.

1. Go to step 2 of Template Design.
2. In the *Alternative images* area, choose:
    - *New image from My Favorites*: select one of the images listed in the picklist.

      The image is displayed above the picklists.
    - *All images from collection*: select one of your collections in the picklist.

      All the images from the collection are displayed above the picklists.
    - *Select a Different Image*: this opens the Media Pool search.
        1. Start the search.
        2. In the search results, activate the checkboxes on the images that you want to use as alternatives.
        3. Choose *Apply*.

      The selected images are displayed above the picklists.
3. *Optional*: if you have selected too many images, click the X on the superfluous images.

The images are removed.

4. Repeat steps 2 to 3 until your desired alternatives are displayed.
5. Go to step 4 of Template Design.
6. Choose the image variable to which you want to assign the alternative images. See *Box and Variable Navigation* on page 416.
7. In the *Editing options* list, select *either Edit and alternative elements, cropping enabled* or *Edit and alternative elements, cropping disabled*. To specify a cropping, see the *Image Section* on page 234 chapter.
8. In the *Alternative images* area, activate the checkboxes of the images that you want to make available for the document creator to select for this image box.
9. Ensure that the *Search string for images* and *Image affiliate ID* fields are empty.
10. Test the configuration. See *Test* on page 360.

You have created alternative images for the image variable.

Images from the Media Pool, Restricted Using a Search String

As the template designer, you can preset one or more search strings. The document creator then chooses from the Media Pool images that he or she can access and whose properties contain the search strings.

Note

Note that you can make this source available only to document creators that have access to the Media Pool module.

1. Go to step 4 of Template Design.
2. Choose the image variable for which you want the document creator to be able to select images. See *Box and Variable Navigation* on page 416.
3. In the *Editing options* list, select *Edit and alternative elements, cropping disabled*.
4. Enter one or more search strings in the *Search string for images* field. Separate the entries by a space to define multiple search strings. The document creator reaches images that match all search terms word-for-word (case-insensitive). Matches in parts of words do not result in a hit.

5. Ensure that none of the *Alternative images* are activated.
6. Ensure that the *Image affiliate ID* field is empty.
7. Test the configuration. See *Test* on page 360.

The document creator can upload images that meet the following criteria from the Media Pool to the image variable:

- The document creator can reach the images thanks to his or her access authorization
- The properties of the images contain the search strings.

A maximum of 10 hits are displayed on the *Content* tab. The document creator can find additional hits on the *Tag images* tab under *> Add media*.

Images from an Affiliate from the Media Pool

As a designer, you have two options for presetting images based on an affiliate from the *Media Pool* module.

- You specify a fixed affiliate. The document creator chooses from the Media Pool images that are accessible to him or her and assigned to the affiliate.
- You specify that images with the same affiliate ID as the document can be selected. The document is assigned the affiliate ID of the document creator when it is created. This allows the document creator to select images that are assigned to his or her affiliate.

> Note
>
> Note that you can make this source available only to document creators that have access to the Media Pool module.

1. Go to step 4 of Template Design.
2. Choose the image variable for which you want the document creator to be able to select images. See *Box and Variable Navigation* on page 416.
3. In the *Editing options* list, select *Edit and alternative elements, cropping disabled*.
4. Select:
    - *Filter by a specific affiliate ID* if you want to specify a fixed ID. In this case, enter the affiliate ID in the *Image affiliate ID* field.

- *Filter by the affiliate ID of the document* if the document creator should select images assigned to his or her affiliate .

5. Ensure that none of the *Alternative images* are activated.
6. Ensure that the *Search string for images* field is empty.
7. Test the configuration. See *Test* on page 360.

The document creator can upload images that meet the following criteria from the Media Pool to the image box:

- The document creator can reach the images thanks to his or her access authorization
- The images are assigned to the affiliate ID, either a fixed one or the ID of the document creator.

Note

Please note that you cannot enter multiple IDs for a fixed affiliate ID. Likewise, it is not possible to enter parts of affiliate IDs in order to obtain multiple hits.

Custom Structure

You choose *Custom Structure* to define a table as a source. The table is maintained in the system by an administrator and contains standardized data. You also choose the attribute (that is, the column of the table) and therefore the image type, such as *Product Image*. The document creator chooses the line (for example, product *A*). The product image for product *A* is then displayed.

*Prerequisite*You have created a dropdown that is linked to a customer structure. For more information, see *Dropdowns* on page 353.

1. Go to step 4 of Template Design.
2. Select the image variable that you want the custom structure to fill. See *Box and Variable Navigation* on page 416.
3. If the template is a Smart Group: in the *Primary image source* area, select the *Custom structure, if defined* setting.
4. On the *Apply structure and attribute:* input field, choose the button.

   The *Template Dropdowns* dialog box is displayed.
5. Select the template that you want to use as the source.
6. Select the attribute (i.e. the column) from which the image should be taken.

7. Choose *Apply and close window*.
8. In the *Editing options* list, select the *Hide* setting.
9. Test the configuration. See *Test* on page 360.

The document creator selects an object (that is, a line from the custom structure, such as *Product A*. The image from your specified column is displayed in the image box and cannot be replaced with another image by the document creator.

Images from Data Objects

*Prerequisite*The template is a Smart Group. For more information, see *Template Type* on page 167.

With this source, the content is supplied by the *Marketing Data Hub* module. As the template designer, you define which type of data object the document creator can select and which attribute (that is, which image) can be displayed (for example, *Detail image*). The document creator selects a specific data object, and its detail image is loaded.

1. Go to step 4 of Template Design.
2. Choose the image variable that you want to fill with an image from a data object. See *Box and Variable Navigation* on page 416.
3. In the *Primary image source* area, select the *Marketing Data Hub* setting.
4. In the *Data object type* picklist, select the type of data objects for which you want to display an image in the box.
5. In the *Data object attribute* picklist, select the attribute that contains the image. An example of an attribute is *Product image*.
6. If you select a localized type or a localized attribute, set a variant in the *Locale* field:
    - *Document locale*: the data object variant delivers the image whose locale matches the locale of the document.
    - Any other setting: your specified data object variant supplies the image. The document locale is not taken into account.
7. In the *Editing options* list, select the *Hide* setting.
8. Test the configuration. See *Test* on page 360 and the special issues for testing Smart Groups.

The document creator chooses a data object. Its image in this attribute (e.g. *Product image*) is displayed in the image box. The image cannot be replaced with another image by the document creator.

Combinations of Different Sources

You can combine multiple sources for the document creator. The only restriction is that you cannot combine the *Custom Structure* and *Data Objects* sources with each other for an image variable.

You can combine any other sources with each other by changing the instructions described above accordingly. In doing so, note the following cases:

- If you combine the *Custom structure* or *Data Objects* sources with another source, choose an option other than *Hide* from the *Editing options* list, based on the combination that you require.
- Combining *Search string* and *Affiliate ID* has an effect similar to two filters: the document creator can access only the images whose properties contain the search term and that are assigned to the affiliate.
- If you combine the *search string* and a *free selection by the document creator*, the *Use search string for search in Media Pool* checkbox provides you with two options:
    - *Deactivated checkbox*: the document creator can choose from the images that he or she can access and also receives a list of the images that are accessible to him or her and whose properties contain the search string. The list is a recommendation; that is, the document creator does not have to use an image from the list.
    - *Activated checkbox*: the document creator can choose only from the Media Pool images that he or she can access and whose properties contain the search string. The document creator can also further limit the search. This method is useful if the search with the search string returns a large number of hits.
      In addition, the document creator can import images without restriction and access his or her favorites and previously imported images.

Next Step

You then choose whether the document creator can select cropping. See *Image Section* below.

4.2.4.3 Image Section

Choose which image section is displayed and whether the document creator can change the displayed section of the image.

Please note that the ability to select a section depends on the source that you selected in the previous step (see *Sources for Image Variables* on page 228):

Free Selection by the Document Creator

If the document creator is allowed to freely choose from the available images, you as the template designer cannot specify the section shown. Your setting in the *Editing options* field determines whether the document creator can choose a section:

- *Predefined and additional images, cropping disabled*: the document creator cannot choose the section displayed.
- *Predefined and additional images, cropping enabled*: the document creator can choose the section displayed. Note that this option also applies to images that are filtered from the Media Pool using *Search string* or *Affiliate ID*.

Alternatives from the Media Pool, Selected by the Template Designer:

For this source, you or the document creator specify the clipping. You decide this with the setting in the *Editing Options* field

- *Edit and alternative elements, cropping enabled*: The document creator can choose only from the alternative images. You can preselect a section, but the document creator can specify a different section.
- *Edit and alternative elements, cropping disabled*: The document creator can only choose from the alternative images, but cannot specify a section for them. Only you can define a section.

You as the designer define the clipping

1. Go to step 4 of Template Design.
2. Choose the box to which the alternatives are assigned.
3. In the *Alternative images* area for the image with the section that you want to define, choose .

   The *Crop Image* dialog box opens.
4. Optional: change the unit in which the length and position values are displayed (e.g. in cm).
5. Optional: deactivate the *Keep ratio* checkbox if you want to change the aspect ratio of the section.
6. Position the rectangle on the desired image section. If necessary, change the size of the section.
7. Click *Save*.

8. Repeat steps 3 to 7 for each alternative whose displayed section you want to change.

For an alternative that is used in different image boxes, note that you must and can define the section again for each image variable.

Images from the Media Pool, Restricted Using a Search String

If you allow only this source, neither you nor the document creator can control the image section. To allow the document creator to select an image section, you must combine the source with a *free selection by the document creator*.

Images from an Affiliate from the Media Pool

If you allow only this source, neither you nor the document creator can control the image section. To allow the document creator to select an image section, you must combine the source with a *free selection by the document creator*.

Images from a Custom Structure

If you allow only this source, neither you nor the document creator can control the image section. However, the administrator who maintains the custom structure can preset an image section. To allow the document creator to choose an image section, you must combine the source with a *free selection by the document creator*. In this case, the document creator can also change the administrator preset.

Images from a Data Object

If you allow this source in a Smart Group, the document creator can change the image section only if the source is combined with a *free selection by the document creator* in the Smart Group.

Note

The way in which an image is added to an image box is not determined only by whether you allow the document creator to select an image section. Note that the display of images is also affected by frame options (see *Frame Options* on page 250).

4.2.4.4 Help Tools

This section explains which help tools you can provide for the document creator while they edit the image box content.

Note

If you want to control the display of multiple variables in the document editor, see *Advanced Layout* on page 293.

The following options for providing help tools are available to you:

Help Text

Enter a description of the image box in the *Help text* field in step 4 of Template Design. For example, you can inform the document creator about which type of content is to be entered in the variable. This allows you to make it easier for the document creator to edit the variables.

Processing Order for Fields

If you want to recommend a processing order for the document creator, define the *Position of the input box*. Enter a numerical value in the field in step 4 of Template Design. The fields containing the lowest value are displayed at the top of the *Content* tab in the document editor.

Note

The function is unavailable if you are using an *Advanced Layout* on page 293 on the page.

Mandatory Field

If you activate the *Mandatory field* checkbox for an image box in step 4 of Template Design, the box must be filled. When you activate the checkbox, the document creator must edit the box in two situations:

- The original content is not permitted (see the next section)
- The image box is initially empty

Allow Original Content

Activate the checkbox if the document creator is permitted to use the image that is added in the template. Deactivate the option if the image in the template is only a placeholder and must be replaced with an alternative image.

Automatic image selection

If images have to be selected for a document, you can set whether an image is automatically preselected in the *Automatic image* selection list. This simplifies image selection for the document creator.

The following options apply to searching for assets in the Media Pool or to the alternate images stored in the template:

- *No automatic selection*: None of the found images will be selected automatically.
- *Automatic selection if exactly one image is found*: Only if exactly one image is found, it will be selected automatically. In case of multiple images, the document creator must select one image.
- *Automatic selection of the first image*: The first match is always selected automatically.

The options described apply to the following sources:

- Media Pool
- alternative images

If a custom structure or a data object is used as a source, you cannot edit the list because the respective image is preselected. If multiple sources are selected for the image, the sources are prioritized as follows: custom structure - data object - Media Pool - alternative images.

Next Step

After defining the help tools, you have completed the configuration of the content of the image boxes. In the next step, you can configure *Variants* below. If you do not require variants, you can define how the *Displaying Text and Image Boxes* on page 247.

4.2.5 Variants

You use the variants function if the content of boxes, their editing and, under certain conditions, the color scheme changes depending on a feature.

EXAMPLE

You are designing a brochure for a furniture shop to show one of the product groups *Bedroom*, *Living Room*, or *Kitchen*. In each of the variants, the product data is added to their designated Smart Grids. For background images and accompanying texts, the box editing is different. In addition, a color is assigned to each product group. Color is to be used for certain design elements on the page:

- In the *Bedroom* variant, you want the document creator to select images from alternatives that you specify, as the template designer. You also define alternatives for the text because you want to specify the formulation. The design elements are displayed in a light yellow color.
- In the *Bedroom* variant, you want to give the document creator more freedom: you do provide alternatives but also allow the document creator to freely select the images and edit your alternative texts. If you want to make the document creator aware of specific conditions during editing, enter them in the help text. The design elements are displayed in a light blue color.
- Since no images are available for the *Kitchen* product group in your system, you allow the document creator to import images in this variant. However, since you want certain product features to be addressed in the text in any event, you only specify alternatives here. The design elements are displayed in a light gray color.

Note

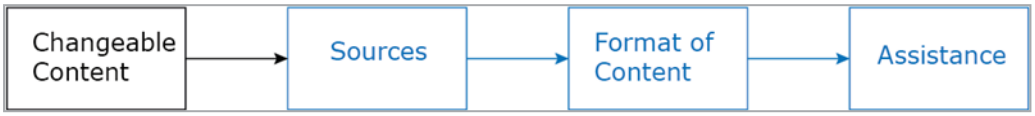
Functionally speaking, the process for creating variants is similar to the *Content of Text Boxes* on page 199 and *Content of Image Boxes* on page 223 work steps. For the sake of clarity, however, BrandMaker recommends that you first perform these steps for a default variant. You can then configure the deviating settings for the variants as described in this section.

What Exactly Can Be Changed in a Variant?

In variants, you can change the content of text and image boxes and, under certain circumstances, the colors of design elements.

Text Boxes

You configure the *Content of Text Boxes* on page 199 in four steps. In a variant, you can change the last three steps:

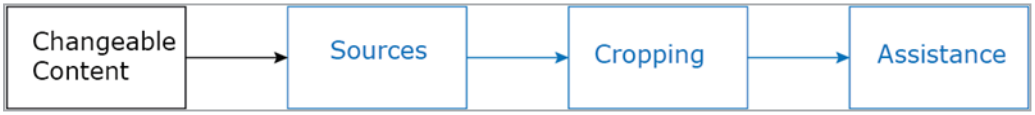


This means that you cannot change which part of a text box can be changed. The specified non-changeable text boxes, variables, and Smart Grids are retained in each variant. However, you can configure a different source, format, and help sections for each text variable.

Alternatively, you can disable the editing of variables in variants.

Image Boxes

You configure the *Content of Image Boxes* on page 223 in four steps. Like with text boxes, you can change the last three steps in a variant:

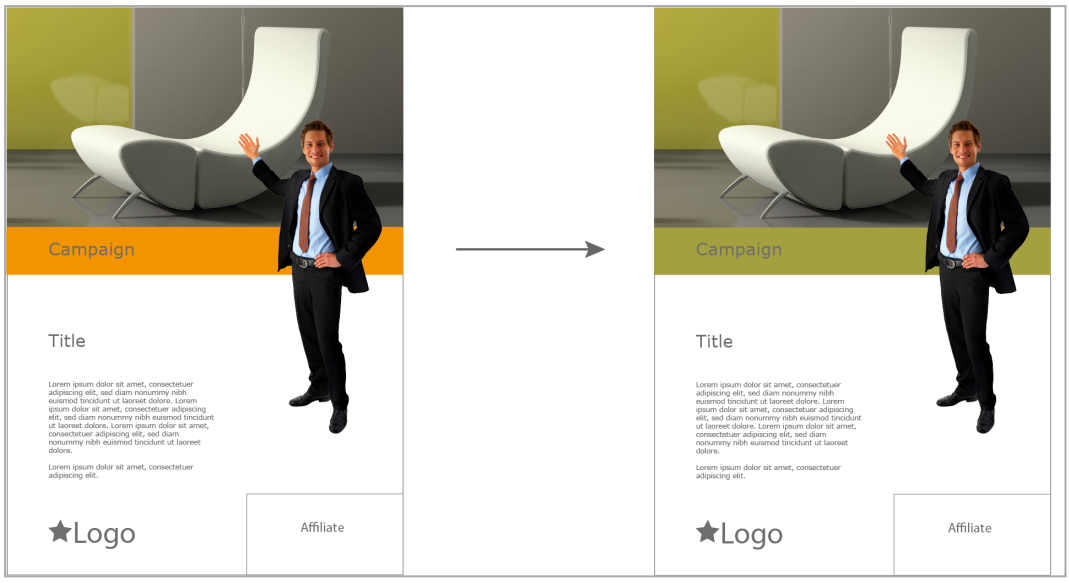


This means that you cannot change whether an image box can be changed and whether the box is the destination for a content service or Smart Grid. However, for each variant, you can change the source, choose a different image section, and provide different help sections.

Alternatively, you can disable the editing of variables in variants.

Color Design

In every InDesign document, there are usually elements that are used to provide a color, brand-compliant or CI-compliant design. You can change the color of these elements from variant to variant:



The following conditions apply when doing so:

- Any number of colors can be changed for each variant, but the source and target colors must be clearly defined as color fields in the INDD file. You must know the exact names of the color fields to configure the color fields. For more information see *Design* on page 115.
- In a variant, a source color can only be changed to a target color throughout the whole document. It is not possible to replace the source color page by page or to replace it with different target colors within the variant.
- When the INDD file was created, text boxes in which the command for executing the color change can be entered were created. Note the characteristics that the text boxes must meet (see *Creation* on page 116).

Selector for Selecting a Variant

To allow the document creator to select a variant, you require a selector (that is, a picklist) in which a variant is assigned to each entry. These selectors are created with dropdowns in Brand Template Builder. For more information, see *Dropdowns* on page 353.

Associated Tasks

- *Configuring Content Variants for Text and Image Boxes in an INDD Template* on the next page
- *Configuring Color Variants* on page 243
- *Disabling the Editing of Variables in Variants* on page 245

Next Step

After you configure the variants, you then specify how *Displaying Text and Image Boxes* on page 247.

4.2.5.1 Configuring Content Variants for Text and Image Boxes in an INDD Template

Prerequisites

- You have configured a dropdown as a variant selector.
- You have configured all the text and image variables that change in a variant.

1. Go to step 4 of Template Design.
2. Choose a variable that changes in the first variant. See *Box and Variable Navigation* on page 416.

   The settings for the variable are displayed for the default variant. You have set this default variant in the last three steps of the sections *Content of Text Boxes* on page 199 and/or *Content of Image Boxes* on page 223.

   The variant list is displayed below the variable selection. If no variants are configured yet, the list displays the default variant.
3. Click the + button next to the variant selection list.

   The *Configure variant* dialog box opens:
4. From the top list, select the dropdown that you want to use as the variant selector.
5. Choose:
   - If you selected a dropdown that is linked to a custom structure, select the entry that you want to link to the first variant in the *Choose variant* list.
   - If you selected a template dropdown without a link to a custom structure:
     1. Enter the name of the first variant in the *Create/edit variant* field.
     2. If you want to translate the name of the first variant:
        - Click .
        - Select the language in which you entered the name.
        - Choose *Next*.

- Add the required translations.
- Click *Save*.

6. Click *Create*.

   The variant entry that you just created is displayed in the variant list. Each field in step 4 of Template Design is now grayed-out and provided with a checkbox.

7. Activate the checkboxes of the fields that change in this variant (for example, *Mandatory field* or *Editing options*). For fields whose checkboxes you do not activate, the settings of the default variant are applied.
8. Enter the settings that apply to these fields in this variant.
9. Select the next variable that differs from the default variant in this variant.
10. Repeat steps 7 to 9 for each variable that changes in this variant.
11. Repeat steps 3 to 10 for each variant that you require.
12. Test your settings. See *Test* on page 360.

You have configured the content variants for the template.

4.2.5.2 Configuring Color Variants

Prerequisites

- You have configured a dropdown as a variant selector.
- Any number of colors can be changed for each variant, but the source and target colors must be clearly defined as color fields in the INDD file. You must know the exact names of the color fields to configure the color change. For more information see *Design* on page 115.
- In a variant, a source color can only be changed to a target color throughout the whole document. It is not possible to replace the source color page by page or to replace it with different target colors within the variant.
- When the INDD file was created, text boxes in which the command for executing the color change can be entered were created. Note the characteristics that the text boxes must meet (see *Creation* on page 116).

1. Go to step 3 of Template Design.
2. Choose the text box in which the command for executing the color change is entered. See *Box and Variable Navigation* on page 416.
3. Mark the box as *Partly changeable*.
4. Select the original text of the box.

5. Choose *Create Variable*.
6. If necessary, change the variable name.
7. If the original text for the variable is different, enter *#brandmaker_script* in the field.
8. If you have provided such text boxes on multiple pages in the template, repeat steps 2 to 7 for each text box.
9. Go to step 4 of Template Design.
10. Choose the variable that you created in step 3. See *Box and Variable Navigation* on page 416.

    The variant list is displayed below the variable selection. If no variants are configured yet, the list displays the default variant.

11. Select: if the required variant is created already, select it in the picklist. If the variant is not created yet:
    1. Click the button next to the variant selection list.

       The *Configure variant* dialog box opens:
    2. From the top list, select the dropdown that you want to use as the variant selector.
    3. Choose:
       - If you selected a dropdown that is linked to a custom structure, select the entry that you want to link to the first variant in the *Choose variant* list.
       - If you selected a template dropdown without a link to a custom structure:
         1. Enter the name of the first variant in the *Create/edit variant* field.
         2. If you want to translate the name of the first variant:
            - Click .
            - Select the language in which you entered the name.
            - Choose *Next*.
            - Add the required translations.
            - Click *Save*.
    4. Click *Create*.

The variant entry that you just created is displayed in the variant list. Each field in step 4 of Template Design is now grayed-out and provided with a checkbox.

12. Activate the checkbox for the *Content* area.
13. Ensure that the *Text* radio button is activated.
14. In the text field below the radio button, enter the following command:
    replace_color *<name of the original color in the INDD file> <name of the target color in the INDD file>* document.
    EXAMPLE: if you want to change the color field *Orange* to *Olive*, the command is:
    replace_color Orange Olive document
15. Select the next variable to apply the color change to in this variant.
16. Repeat steps 12 to 15 for each variable to which you want to apply the color change in this variable.
17. Repeat steps 11 to 16 for each variant that you want to create.
18. Test your settings. See *Test* on page 360.

You have configured the color variants for the template.

4.2.5.3 Disabling the Editing of Variables in Variants

Prerequisites

- You have configured a dropdown as a variant selector.
- You have configured all the text and image variables that change in a variant.

1. Go to step 4 of Template Design.
2. Choose a variable for which you want to disable editing in a variant. See *Box and Variable Navigation* on page 416.

   The settings for the variable are displayed for the default variant. You have set this default variant in the last three steps of the sections *Content of Text Boxes* on page 199 and/or *Content of Image Boxes* on page 223.

   The variant list is displayed below the variable selection. If no variants are configured yet, the list displays the default variant.

3. Click the button next to the variant selection list.

   The *Configure variant* dialog box opens:

4. From the top list, select the dropdown that you want to use as the variant selector.
5. Choose:
    - If you selected a dropdown that is linked to a custom structure, select the entry that you want to link to the first variant in the *Choose variant* list.
    - If you selected a template dropdown without a link to a custom structure:
        1. Enter the name of the first variant in the *Create/edit variant* field.
        2. If you want to translate the name of the first variant:
            - Click .
            - Select the language in which you entered the name.
            - Choose *Next*.
            - Add the required translations.
            - Click *Save*.
6. Click *Create*.

    The variant entry that you just created is displayed in the variant list. Each field in step 4 of Template Design is now grayed-out and provided with a checkbox.
7. Activate the checkbox for the *Editing options* field and select *Hide* in the list.
8. Only for INDD templates: if you selected the *Marketing Data Hub* source in the default variant:
    1. Set the *Data object type* field to the entry *Please select...*.
9. If you selected the *Data from custom structure* source in the default variant:
    1. Activate the checkbox next to the *Apply structure and attribute* field.
    2. Delete the specification for the custom structure and the attribute from the field by clicking .
10. Optional: choose the next variable for which you want to disable editing in this variant.
11. Repeat steps 7 to 10 for each variable for which you want to disable editing in this variant.
12. Repeat steps 3 to 11 for each variant in which you want to disable variable editing.

13. Test your settings. See *Test* on page 360.

4.2.6 Displaying Text and Image Boxes

You have the following configuration options:

- Is the document creator allowed to transform (move, scale, and rotate) the boxes? To what extent is the document creator allowed to transform the boxes? For more information, see the section *Transformation* below.
- How do the box and its contents adapt to each other? For example, does a text box adapt to the text character count and, if so, how? For more information, see the section *Frame Options* on page 250.
- If the template is scalable: how do the boxes change based on the document scaling? How does the position of boxes change and does their size adapt to the document scaling? See *Alignment and Size Adjustment* on page 269.

Next Step

In the next step, you can define the available *Document Structure* on page 273 for multi-page templates.

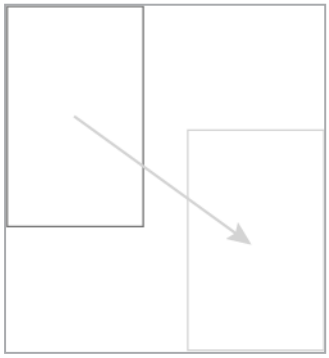
4.2.6.1 Transformation

Configure the transformation for each box. The available transformations can be combined in any way.

> **Note**
>
> The InDesign transformation *Shear* cannot be used in Brand Template Builder.

Movement

The document creator can move the box in the x and y directions. When doing so, the center point of the box must remain on the side:



Activating Movement

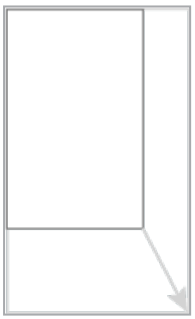
1. Go to step 3 of Template Design.
2. Choose the box for which you want to enable movement. See *Box and Variable Navigation* on page 416.
3. Click the button next to *Configure transformations*.

   The transformation configuration area is displayed.
4. Activate the *Allow movement* checkbox.
5. Repeat steps 2 to 4 for all the boxes for which you want to allow movement.
6. Test the activated transformations. See *Test* on page 360.

The document creator can move the boxes that you have configured accordingly.

Scaling

The document creator can adapt the width and height of the box. When doing so, the center point must remain on the side. You also specify the range in which scaling is permitted. For more information, see the section *Scaling Range* on page 180.



Activating and Configuring Scaling

1. Go to step 3 of Template Design.
2. Choose the box for which you want to enable movement. See *Box and Variable Navigation* on page 416.
3. Click the button next to *Configure transformations*.

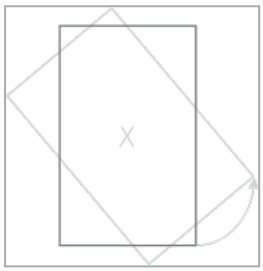
   The transformation configuration area is displayed.
4. Activate the *Allow resizing* checkbox.
5. Configure the *Scaling Range* on page 180.
6. Repeat steps 2 to 5 for all the boxes for which you want to allow resizing.

7. Test the activated transformations. See *Test* on page 360.

The document creator can scale the boxes that you have configured accordingly.

Rotation

The document creator can rotate the selected box around its center point. You can specify the rotation range.



Activating and Configuring Rotation

1. Go to step 3 of Template Design.
2. Choose the box for which you want to enable rotation. See *Box and Variable Navigation* on page 416.
3. Click the button next to *Configure transformations*.

   The transformation configuration area is displayed.
4. Activate the *Allow Rotation* checkbox.
5. Optional: enter a rotation range.
6. Repeat steps 2 to 5 for all the boxes for which you want to allow rotation.
7. Test the activated transformations. See *Test* on page 360.

The document creator can rotate the boxes that you have configured accordingly.

4.2.6.2 Frame Options

You configure the frame options for each box separately in step 3 of Template Design. You can enter strings directly in the *Frame options* area to define frame options, such as *fill_frame_proportionally=true*. You activate some of the options using the buttons. For more information, see the *Notes* column in the *Available frame adjustment options* section.

Note

Frame options always apply only to the box that is selected when you enter the strings. See *Box and Variable Navigation* on page 416.

Available Frame Options

The table below lists the available frame options.

Note

As well as the listed frame options, Brand Template Builder uses the options *inject* and *inline*. These options are entered automatically in the input field for the frame options. Do not change or delete these entries!

Name	Description		String	Box type	Value range, *default value*	Notes
Box type: sltype=1		Set the box type. *sltype=1* represents a normal text or image box.	sltype	Image, text	*1*	
Box type: sltype=2		Set the box type. *sltype=2* represents a text box with a dynamic height. The box height increases until the text fully fits into the box.		Text	2	

Name	Description		String	Box type	Value range, *default value*	Notes
Box type: sltype=4		Set the box type. *sltype=4* represents an image box with an extendible width. The width of the box changes as a percentage based on the increased width of the document. The box height changes proportionally to this. The image is positioned and scaled so that the same image section fills the enlarged box. For this box type, you have to specify the frame option *sx*, which sets the (percentage) value of the extended document width by which the box is widened.		Image	4	

Name	Description		String	Box type	Value range, *default value*	Notes
Move a box in x direction when using non-proportional scaling		When using non-proportional scaling, the box is moved in the applicable direction. You specify a value between 0 and 100 in the frame options. The value corresponds to the percentage of the non-proportional scaling by which the box moves in this direction. Example: px=25 (25%); if the width increases by 50 mm, the box is moved 12.5 mm (25% of 50 mm) to the right.	px	Image, text	Floating point number between 0 and 100	
Move a box in y direction when using non-proportional scaling			py	Image, text	Floating point number between 0 and 100	

Name	Description		String	Box type	Value range, *default value*	Notes
Scale a box in x direction when using non-proportional scaling		When using non-proportional scaling, the box is also scaled in the applicable direction. You specify a value between 0 and 100 in the frame options. The value corresponds to the percentage of the non-proportional scaling by which the box is scaled in this direction. Example: sx=25 (25%); if the width increases by 50 mm, the width of the box is extended by 12.5 mm (25% of 50 mm).	sx	Image, text	Floating point number between 0 and 100	
Scale a box in y direction when using non-proportional scaling			sy	Image, text	Floating point number between 0 and 100	

Name	Description		String	Box type	Value range, *default value*	Notes
Enlarge box rightward		The box is enlarged in the specified direction. If you enter a value greater than 0, this represents the maximum increase in the direction in mm. If the content is larger than the box, the size of the box increases in the direction up to the maximum value entered in mm. If the value is -1, the size of the box increases in the direction until the text fully fits into the box or the edge of the image in this direction is in the box. For image boxes with this frame option, you can no longer activate the *Crop Image* option (see *Image Section* on page 234). Processing sequence: *growright* > *growbottom* > *growleft* >	growright	Image, text	-1 or ≥ *0*	

Name	Description		String	Box type	Value range, *default value*	Notes
		growtop				
Enlarge box downward			growbottom	Image, text	-1 or ≥ *0*	
Enlarge box left-ward			growleft	Image, text	-1 or ≥ *0*	
Enlarge box upward			growtop	Image, text	-1 or ≥ *0*	

Name	Description	String	Box type	Value range, *default value*	Notes
Shrink box from the right	The box is shrunk from this direction until the content fits. The opposite box edge is kept at the same position. For image boxes with this frame option, you can no longer activate the *Crop Image* option (see *Image Section* on page 234). Processing sequence: *shrinkright* > *shrinkbottom* > *shrinkleft* > *shrinktop*	shrinkright	Image, text	*false*, true	
Shrink box from below		shrinkbottom	Image, text	*false*, true	Note: you activate this option using the button in step 3 of Template Design.
Shrink box from the left		shrinkleft	Image, text	*false*, true	
Shrink box from above		shrinktop	Image, text	*false*, true	

Name	Description		String	Box type	Value range, *default value*	Notes
Shrink image and fit it proportionally		The image is positioned in the top left corner of the box and shrunk proportionally until it fully fits into the box. If the box and image have different proportions, there is white space at the bottom or on the right side in the box.	shrinkimage	Image	*false*, true	Note: you activate this option using the button in step 3 of Template Design.
Enlarge image and fit it proportionally		The image is positioned in the top left corner of the box and enlarged proportionally until it fully fits into the box. If the box and image have different proportions, there is white space at the bottom or on the right side in the box.	growimage	Image	*false*, true	Note: you activate this option using the button in step 3 of Template Design.

Name	Description		String	Box type	Value range, *default value*	Notes
Fill image box proportionally		The image is positioned in the top left corner of the box and enlarged or shrunk proportionally until it fills out the box. If the box and image have different proportions, the image is cropped from below or on the right.	fill_frame_proportionally	Image	*false*, true	Note: you activate this option using the button in step 3 of Template Design.
Set clipping path		Set the clipping path for the image. • *entire*: the outer (and inner, where applicable) clipping path is selected. • *outsideonly*: only the outer clipping path is selected.	clipping	Image	entire, outsideonly	

Name	Description		String	Box type	Value range, *default value*	Notes
Shrink text		The text is horizontally and vertically shrunk until it fits into the box. You specify the percentage for horizontal shrinking in the parameter *fit_tb_squeeze_x* and the percentage for vertical shrinking in the parameter *fit_tb_shrink_y*.	box_fitting	Text	fit_text_to_box	
Adapt box to text and align on the center point		The box shrinks or enlarges to adapt to the amount of text. The position of the box center point is retained in doing so.	fitbox_centrally	Text	true	

Name	Description		String	Box type	Value range, *default value*	Notes
Proportionally adapt text to box		The text shrinks or enlarges proportionally to adapt to the box.	fittext	Text	true	Note: this frame option is not an InDesign function and cannot guarantee perfect results, particularly where there are additional conditions such as text wrapping due to overlapping boxes. The calculation stops after 20 iterations. The box size may change significantly. Note: Note that the frame options fittext, fittext_min and fittext_max cannot be combined.
Proportionally adapt text to box		The text shrinks proportionally to a minimum size to fit the box. The absolute minimum size is 0.1 pt.	fittext_min	Text	Floating point number between 0.1 and 1296 [pt]	
Proportionally adapt text to box		The text enlarges proportionally up to a maximum size to fit the box. Absolute maximum size is 1296 pt.	fittext_max	Text	Floating point number between 0.1 and 1296 [pt]	

Name	Description		String	Box type	Value range, *default value*	Notes
Align image in box		The image is aligned in the box based on the selected value. Be aware of the effects when the image is cropped while creating the document: • If the image is cropped proportionally, the box is filled with the image. • If the image is cropped non-proportionally, then the box shrinks and its position is adapted according to the alignment.	image_align	Image	topleft, topcenter, topright, middleleft, middlecenter, middleright, bottomleft, bottomcenter, bottomright	

Name	Description		String	Box type	Value range, *default value*	Notes
Display image section optimally and without white space		The following frame options are intended for displaying images that are read from a custom object and for which a cropping frame is defined in the custom object. In both cases, the system ensures that the cropping frame displayed in the document is as close as possible to the focus point defined by the cropping frame (defined in the custom object). In no case is white space created. The option *max_proportional_size_min_focus_point_distance* shows the largest possible section of the source image in the aspect ratio of the image box. The option *min_proportional_size_min_focus_point_distance*	max_proportional_size_min_focus_point_distance		true	Note: These frame options can only be used alone and cannot be combined with other frame options. Note: For a better representation of the table in this documentation, the names of the frame options are entered here with breaks. If you enter one of the names in the template layout by copying from this document, make sure that the copy does not contain any breaks or spaces.

Name	Description		String	Box type	Value range, *default value*	Notes
		shows the smallest possible section of the source image in the aspect ratio of the image box to which the following applies: • The section contains the complete cropping frame. • If the cropping frame cannot be shown completely, either the full height or width of the cropping frame is shown.				
			min_ proportional_ size_min_ focus_point_ distance			

Name	Description		String	Box type	Value range, *default value*	Notes
Define the priority of the box while processing its frame options		You can use this frame option to define the priority of the box if multiple boxes with frame options have to be processed. A low value means a high priority. Boxes are processed in the following order: 1. Boxes with the frame option *scaling_priority* 2. Anchored boxes in the order of their y-position 3. Other boxes in the order of their y-position	scaling_priority	Text, image	Whole numbers	

Activating Frame Options

1. Go to step 3 of Template Design.
2. Choose the box for which you want to activate a frame option. See *Box and Variable Navigation* on page 416.
3. In the *Frame options* area, choose .

The frame options configuration area is displayed.

4. Enter the appropriate strings for the frame options required (see *Available Frame Options* on page 250). Ensure the correct *Syntax* below.
5. Repeat steps 2 to 4 for all the boxes for which you want to activate frame options.
6. Test the activated options. See *Test* on page 360.

In customizing, the configured frame options are used for the boxes.

Syntax

When you enter the strings, ensure the following syntax.

- Enter each frame option inside the square brackets.
- Separate multiple frame options from each other using a semicolon (;).

The order of the entered frame options does not have an effect on the result. For more information, see also the section *Processing Order* below.

Processing Order

When processing multiple boxes with frame options, the following order applies:

1. Boxes with the frame option *scaling_priority*
2. Anchored boxes in the order of their y-position
3. Other boxes in the order of their y-position

If a box has multiple frame options, the frame options are processed in the following order:

1. grow-/shrink options
    - Text box:
        a. If the box has a grow option and the box has a text overflow, the order is: *growright, growbottom, growleft, growtop*. If the box does not have a text overflow, grow options are ignored.
        b. If the box has a shrink option and the box does not have a text overflow, the order is: *shrinkright, shrinkbottom, shrinkleft, shrinktop*. If the box has a text overflow, shrink options are ignored.
    - Image box:
        a. If the box has a shrink option and the image is larger than the box on each side, the order is: *shrinkright, shrinkbottom, shrinkleft, shrinktop*. If the image fits into the box, shrink options are ignored.
        b. If the box has a grow option and the image is smaller than the box, the order is: *growright, growbottom, growleft, growtop*. If the image is larger than the box, grow options are ignored.
2. box_fitting: for text boxes
3. fitbox_centrally: for text boxes
4. fittext: for text boxes

4.2.6.3 Alignment and Size Adjustment

> **Note**
>
> Box alignment and size adjustment are required and/or possible only when using a scalable basic template or Smart Group (see *Scalable* on page 178).

> **Note**
>
> Alignment and size adjustment are frame adjustment options and can be entered accordingly (see *Frame Options* on page 250). A configuration such as the one described on this page therefore also has an effect on the *Frame options* area.

Alignment

The alignment defines how the position of the box changes when the document is scaled non-proportionally. Here, you specify an alignment point for the box (for example, right edge, top left corner, or center point). During the alignment, the distance of the box to the relevant alignment point is retained.

You enter the alignment point in a matrix. The following matrixes are available:

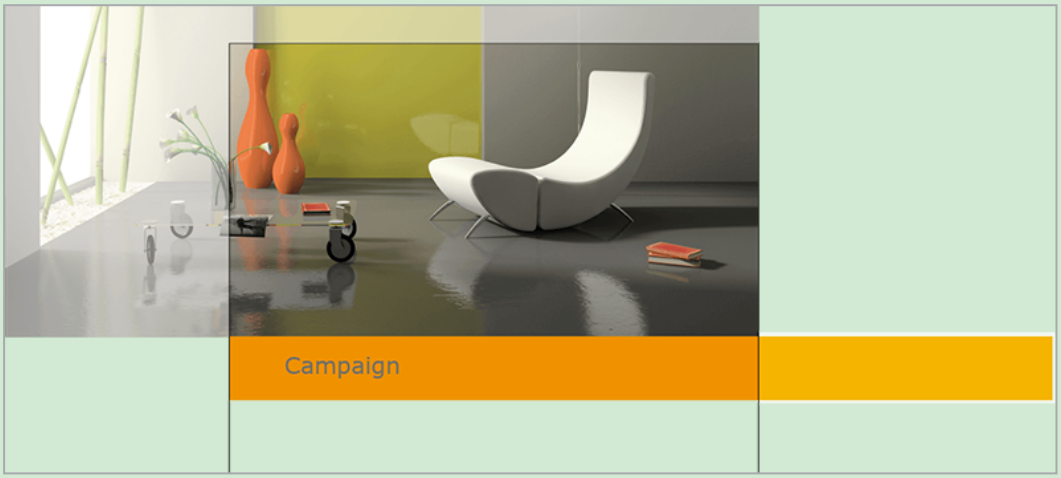
- 3 x 3 alignment points:
- 4 x 4 alignment points:

Note

The matrix displayed in your system is set in the module configuration. See *Configuring Template Design* on page 49 or contact your module or system administrator if you have any questions.

EXAMPLE

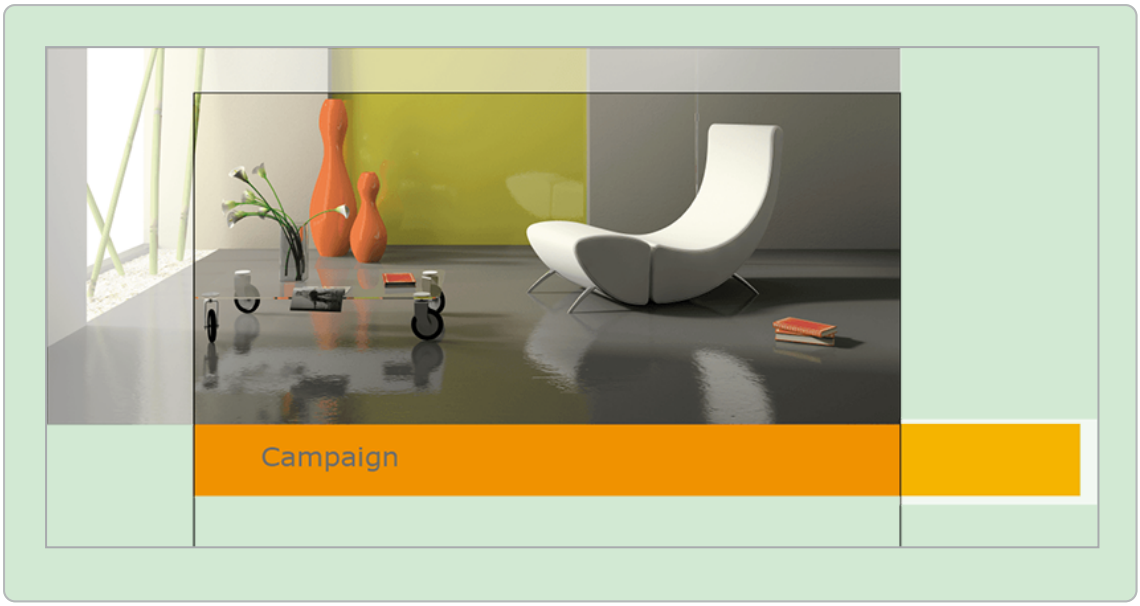
In the following example, you can see the upper part of an advert with three boxes: the image of an armchair, an orange bar as a design element, and the "Campaign" text box:



The image and the orange bar are larger than the document and therefore protrude over the edges. The boxes are aligned as follows:

- Image: right
- Bar and text box: left

The document is widened during customizing. The right edge of the image remains on the right edge of the document. A part of the image section that was previously hidden is now visible: the table is now fully displayed. For the bar and the text box, the distance to the left edge remains unchanged; the visible part of the bar is enlarged:



Size Adjustment

Besides the direction in which a box moves during scaling of the document, you can also define the size adjustment. Depending on the variants of the alignment matrix used (3 x 3 or 4 x 4), select the following values from the *Size adjustment* picklist:

Matrix	Available size adjustment level
3 x 3	0 %, 50 %, 100 %
4 x 4	0 %, 33 %, 66 %, 100 %

You define how much a box will change during a size change here.

EXAMPLE

You select a size adjustment of 100% horizontal and 50% vertical for a box. The document creator now widens the document by 5 % and increases the height by 10 %.

Since the box adopts the size adjustment of 100 % horizontally, the box also widens by 5 %. However, you want the box to adapt only 50 % vertically. The height of the box therefore also changes by 5%.

Note

If the position of a box to the right margin does not change (right edge alignment point), the box may exceed the page margins if its size is modified by 100%.

Image boxes are magnified, but the images are not distorted. During scaling, you should therefore use images with sufficiently large dimensions to ensure a sufficient buffer for the non-proportional scaling.

Configuring Alignment and Size Adjustment

*Prerequisite*You are editing a scalable basic template or Smart Group.

1. Go to step 3 of Template Design.
2. Choose the box whose alignment and size adjustment you want to configure. See *Box and Variable Navigation* on page 416.
3. Select the alignment point in the matrix.
4. In the *Non-proportional scaling* area, select the size adjustment in the vertical and horizontal direction.
5. Test the alignment and size adjustment. See *Test* on page 360.

When the document creator scales the document, the boxes are adapted according to your configuration.

4.2.7 Document Structure

In this step, you choose which changes the document creator can make to the document structure. When doing so, you specify the following items:

Configuring a Changeable Page Order

> **Note**
>
> You can configure the page order to be changeable only in multi-page basic templates.

You use this feature only to allow the document creator to change the order of the pages; however, he or she cannot change the total number of pages or replace or delete pages. See *Configuring a Changeable Page Order* on the facing page.

> **Note**
>
> You can configure the following functions only in basic templates that can be enhanced with Smart Pages (see *Enhancement with a Smart Page* on page 178).

Sections

If a basic template can be enhanced with Smart Pages, you can set up document sections. Sections give you the following options:

- You can map chapters or content sections at the highest document level.
- You can use sections to determine the part of a document in which the document creator can add, replace, or delete pages.
- You can configure specific properties such as master pages, page dividers, or the maximum number of pages separately for each section.

A section is displayed for the document creator as a self-contained part of a document. For more information, see *Sections* on the facing page.

Permitted Number of Pages

If you create a multi-page document for printing, you generally have to adhere to a specific number of pages for creating the printed sheets (for example, page divider 4). When using a basic template that can be enhanced with Smart Pages, the template designer cannot define the final number of pages. In Brand Template Builder, you have two options for setting appropriate guidelines for the document creator. For more information, see *Permitted Number of Pages* on page 284.

Next Step

In the next step, you define the *Help Sections and Process Specifications* on page 290.

4.2.7.1 Configuring a Changeable Page Order

> **Note**
>
> You can configure the page order to be changeable only in multi-page basic templates.

1. Go to step 1 of Template Design.
2. Activate the *Page order is changeable* checkbox.

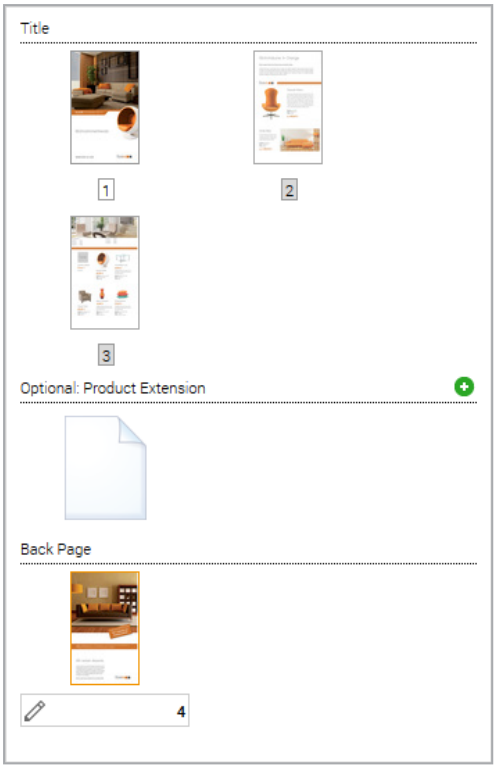
The document creator can change the order of the pages.

4.2.7.2 Sections

If a basic template can be enhanced with Smart Pages, you can set up document sections.

- You can map chapters or content sections at the highest document level.
- You can use sections to determine the part of a document in which the document creator can add, replace, or delete pages.
- You can also configure properties such as page dividers or the maximum number of pages separately for each section.

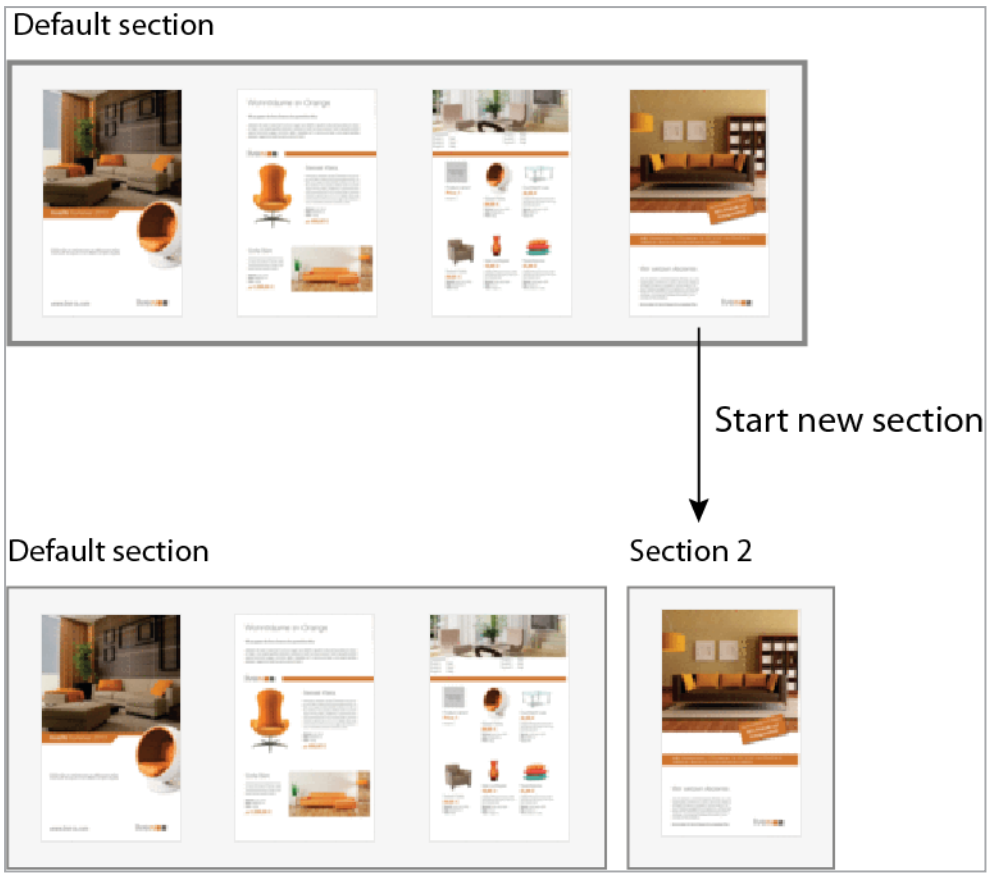
Sections are displayed for the document creator as parts of the document in *Page view* mode in the document editor (with the *Show only editable content* checkbox deactivated). The following example shows a document consisting of three sections: *Title*, *Optional: Product Extension*, and *Back Page*.



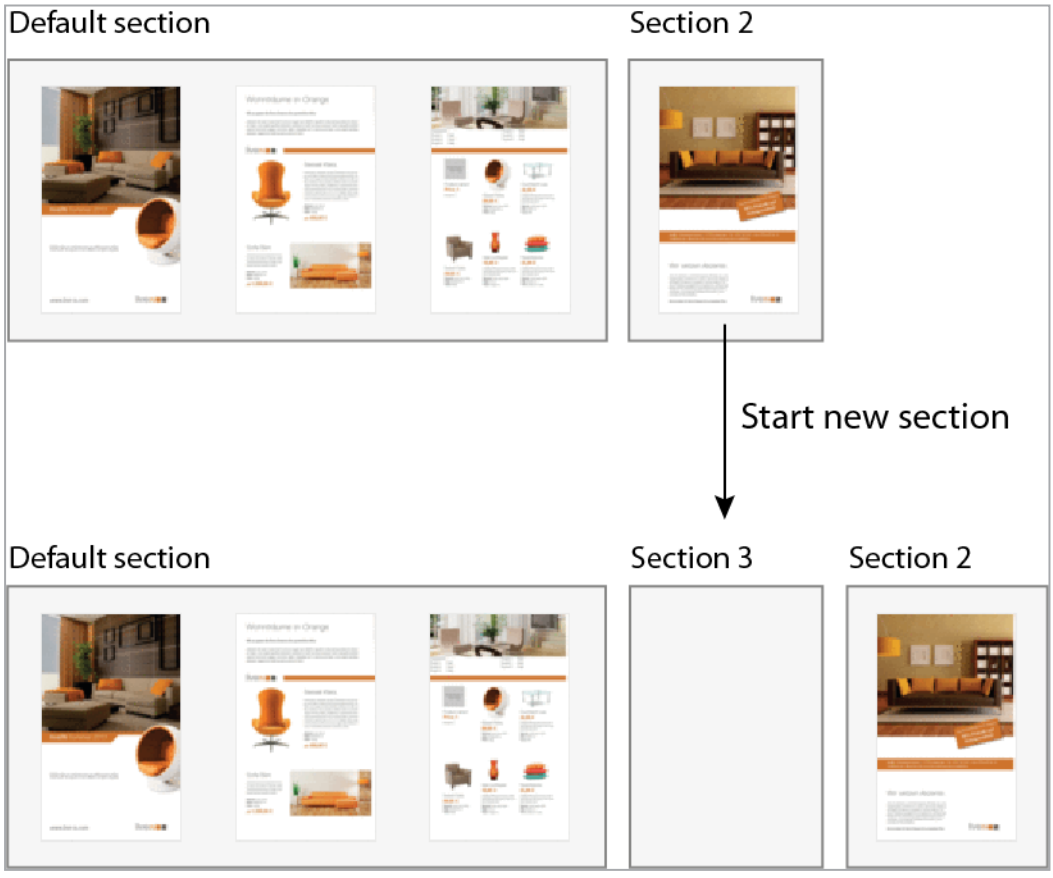
The button shows that pages can be added and swapped in this section. Therefore, in this example, pages can be added only in the *Optional: Product Extension* section. The two other sections cannot be changed by the document creator.

How it Works

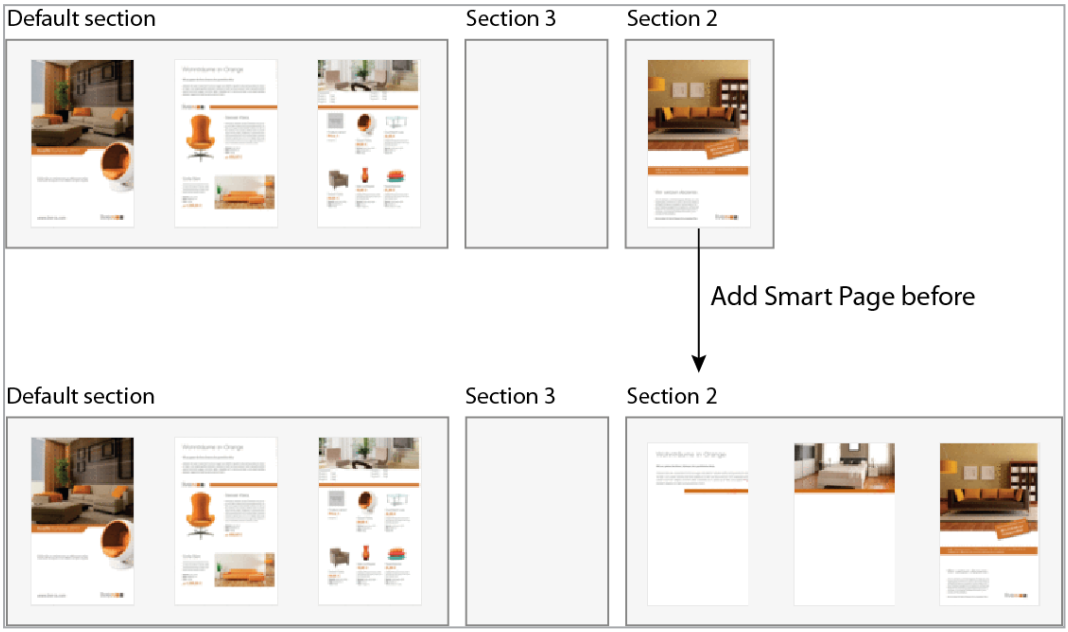
When you create a basic template, all the pages are initially added in the *Default section*. If you start a section on a page, this page and all the subsequent pages in the current section are added to the new section:



To create an empty section, start a section on the first page of a section:



You can also add Smart Pages at any position in the document and use them to enhance the original document:



Settings

You can configure the following settings for sections:

Page Divider, Min. and Max. Number of Pages

You can use these properties to specify the number of pages permitted in the section. See *Permitted Number of Pages* on page 284.

Configuring Original Pages that Can Be Deleted and Replaced

Activate the checkbox *Allow deletion/replacement of original template pages by user* if a section already contains the maximum number of pages. The document creator can then delete and replace the original pages in the template. Note that the Smart Pages can always be deleted and replaced, even if you as the template designer have added them to the template.

Smart Pages

You can use the following settings for Smart Pages that you add to the template or that the document creator adds to the document.

Using Master Pages

To display content in a standardized layout, choose one of the master pages created in the INDD file in this field. This setting is then applied to Smart Pages that are added to the section, either in the template by you as the template designer or by the document creator.

Specifying the Smart Pages that Can Be Inserted

You can use the following tools to determine which Smart Pages the document creator can add:

- *Allow only valid Smart Pages*: specify that only valid Smart Pages can be used during customizing. You define the validity period of a template in step 1 of Template Design.
- *Search phrase for Smart Pages*: enter a search term used to search through the Smart Page Library. You cannot enter multiple search terms.
- *Choose explicit Smart Pages/Smart Page Library*: choose specific Smart Pages for customizing from the Smart Page Library. During customizing, the user can only choose from the Smart Pages defined here.

Positioning of Smart Pages inside the Section

Choose the position at which a document creator can add a Smart Page:

- *To the right of the selection (default setting)*
- *At the beginning of a section*
- *At the end of a section*

You access all of these settings in step 5 of Template Design. You can access the settings for Smart Pages that can be added and the positioning of Smart Pages only if Smart Pages can be added in the section. This is possible in the following situations:

- As the template designer, you have added Smart Pages to the template. These Smart Pages can always be swapped by the document creator.
- The section can be edited by the document creator:
    1. The maximum number of pages is higher than the current number of pages in the section.

       or

2. The checkbox *Allow user to delete/replace original template pages* is activated.

Associated Tasks

- *Creating a Section* below
- *Editing a Section* on the facing page
- *Deleting a Section* on the facing page
- *Configuring a Section as Non-Changeable* on page 282
- *Adding a Smart Page* on page 282
- *Deleting a Smart Page* on page 283
- *Configuring Settings for Smart Pages* on page 283

4.2.7.2.1 Creating a Section

Note

You can create sections only in basic templates that can be enhanced with Smart Pages (see *Enhancement with a Smart Page* on page 178).

1. Go to step 5 of Template Design.
2. Click the *Menu* button next to the page that you want to be the first page in the new section.
3. Choose *Start new section*.

   The *Add/Edit Template Section* is displayed.
4. Enter a name for the section.
5. Optional: translate the section name:
   1. Click .

      The *Select the Language* dialog box is displayed.
   2. Select the language for the name that is already entered.
   3. Choose *Next*.

      The *Enter Language Versions* dialog box is displayed.
   4. Enter the required translations.
   5. Click *Save*.
6. Choose *Add*.

The new section is displayed. The start page and all the subsequent pages in the current section are assigned to the section.

4.2.7.2.2 Editing a Section

When you edit a section, you can change the name or provide a translation.

1. Go to step 5 of Template Design.
2. Choose:
   - Click the *Menu* button for a page in the section and choose *Edit section name*.

     or
   - In the *Select section* list, select the section and choose *Edit*.
3. Edit the name.
4. Optional: translate the section name:
   1. Click .

      The *Select the Language* dialog box is displayed.
   2. Select the language for the name that is already entered.
   3. Choose *Next*.

      The *Enter Language Versions* dialog box is displayed.
   4. Enter the required translations.
   5. Click *Save*.
5. Click *Save*.

You have edited the section.

4.2.7.2.3 Deleting a Section

Note

When you delete a section, you do not delete its corresponding pages.

1. Go to step 5 of Template Design.
2. Choose:
   - Click the *Menu* button for a page in the section and choose *Delete section*.

or

- In the *Select section* list, select the section and choose *Delete*.

3. The *Delete Template Section* dialog box opens.

   Note: if the section does not contain any pages, this step is omitted.

4. Choose whether you want to add the pages to the section before or after it.

   Note: if there is only one section before or after this one, the selection is restricted accordingly.

5. Choose *Confirm Deletion*.

The section is deleted. The pages are added to other sections according to your setting.

4.2.7.2.4 Configuring a Section as Non-Changeable

> **Note**
>
> You can configure a section as non-changeable only if you have not added any Smart Pages.

1. Go to step 5 of Template Design.
2. In the *Select section* list, select the section.
3. Enter the current number of pages in the section in the *Min. number of pages* and *Max. number of pages* fields.
4. Ensure that the checkbox *Allow user to delete/replace original template pages* is deactivated.
5. Test the configuration. See *Test* on page 360.

You have configured the section as not changeable.

4.2.7.2.5 Adding a Smart Page

> **Note**
>
> The description below applies only to basic templates that can be enhanced with Smart Pages (see *Enhancement with a Smart Page* on page 178).

1. Go to step 5 of Template Design.
2. Click the *Menu* button next to the page either before or after the Smart Page.

3. Choose:
    - If you want to add the Smart Page before the page, choose *Add Smart Page before*.
    - If you want to add the Smart Page after the page, choose *Add Smart Page after*.

    The Smart Page Library is displayed.
4. Move the mouse over the preview image of the Smart Page that you want to add.

    A checkbox is displayed.
5. Activate the checkbox.
6. Repeat steps 4 and 5 with all the Smart Pages that you want to add at this point.
7. Click *Save*.

The Smart Pages are added to the template at the selected point.

4.2.7.2.6 Deleting a Smart Page

> **Note**
>
> Note that you must delete each page of a Smart Page individually: if you have added a two-page Smart Page and want to delete both pages, you must carry out the instructions below for each page.

1. Go to step 5 of Template Design.
2. Next to the Smart Page that you want to delete, choose *Menu*.
3. Choose *Delete Smart Page*.

The page is deleted.

4.2.7.2.7 Configuring Settings for Smart Pages

The settings for Smart Pages relate to the following issues:

- Using master pages
- Specifying the Smart Pages that can be inserted
- Positioning of Smart Pages inside the section

Note

You can only define the Smart Pages to be added and their position in the section if the document creator can add Smart Pages. This is possible in the following situations:

- As the template designer, you have added Smart Pages to the template (see *Adding a Smart Page* on page 282). These Smart Pages can always be swapped by the document creator.
- The section can be edited by the document creator:
  1. The maximum number of pages is higher than the current number of pages in the section.

     or

  2. The checkbox *Allow user to delete/replace original template pages* is activated.

1. Go to step 5 of Template Design.
2. In the *Select section* list, you select the section in which the document creator can add Smart Pages and for which you want to provide help tools for Smart Pages.
3. Edit the settings for Smart Pages. For a description of the settings, see the section > *Settings* > *Smart Pages* in the chapter *Smart Pages* on page 278.
4. Repeat steps 2 and 3 for each section in which the document creator can add Smart Pages and for which you want to provide help tools for Smart Pages.

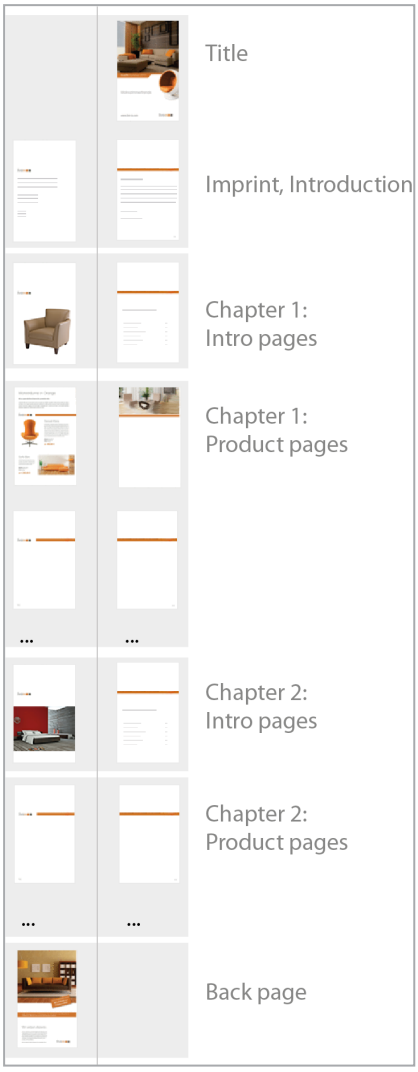
You have configured help tools for Smart Pages.

4.2.7.3 Permitted Number of Pages

If you create a multi-page document for printing, you generally have to adhere to a specific number of pages for creating the printed sheets (for example, page divider 4). When using a basic template that can be enhanced with Smart Pages, the template designer cannot define the final number of pages. In Brand Template Builder, you have two options for setting appropriate guidelines for the document creator:

- Define the permitted number of pages for the overall document. In this case, you specify a page divider and, where applicable, an offset for the overall document. At the same time, you can define the minimum and maximum number of pages for sections as required.

- Specify the page dividers and the permitted number of pages for sections. We recommend this measure if the overall document is structured in page blocks, for example, because you are using a double-sided layout:



> **Note**
>
> You can use only one of the methods: if you configure the permitted number of pages for the overall document, you cannot specify page dividers for sections and vice versa.

Permitted Number of Pages for the Overall Document

When you define the permitted number of pages for the overall document, you can specify a page divider and, where applicable, an offset to incorporate a double-sided cover, for example. In this case, the document creator cannot finalize the document until it has a certain overall number of pages, which is the whole number represented by f in the following calculation:

EXAMPLE

You define a page divider of 4 and an offset of 2. The document creator edits a document and reaches 24 pages.

In this case, an error message is displayed for the document creator and the document cannot be finalized.

- Add two pages:
- Remove two pages:

You can also specify the minimum and maximum number of pages for editable sections to limit the overall size.

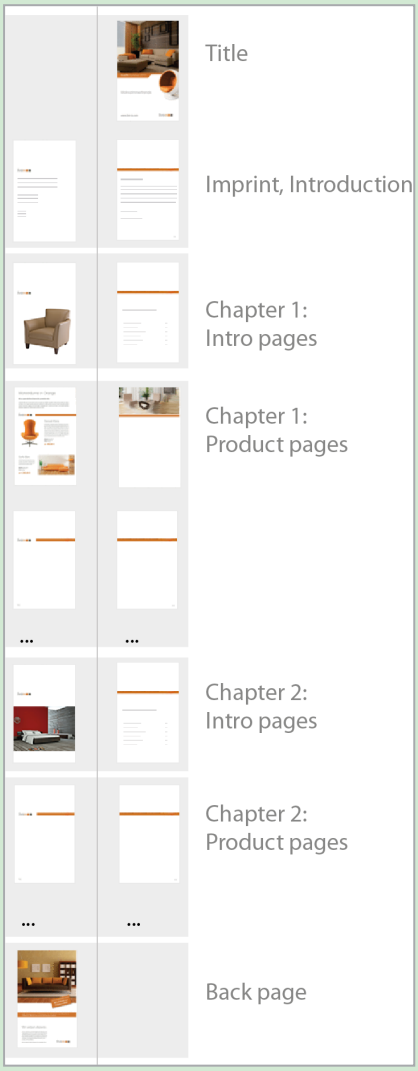
To learn how to configure the permitted number of pages for the overall document, see *Configuring the Permitted Number of Pages for the Overall Document* on page 288.

Page Dividers and Permitted Number of Pages for Sections

You use this variant for the permitted number of pages for templates with pages that are structured in blocks.

EXAMPLE

The example below shows a use case with a double-sided layout. The gray areas show the sections in the template. In such a case, pages may also be left blank intentionally.



You set up a template that can map such a document using the page divider 2 in the sections that are enhanced by the document creator, which are the product pages in this example. You can also set up different page dividers for sections. One sample use case would be a three-page, fold-out page in a section of the document.

If you are adding a page divider for sections, you must note the following behavior:

- For this section, Brand Template Builder always expects a number of pages that can be divided by this page divider, even in the template. If an insufficient number of original pages are available, you must add Smart Pages in the template.
- The minimum number of pages for the section must be either 0, the page divider number, or a multiple of the page divider.
- The maximum number of pages for the section must be either the page divider number, or a multiple of it.
- The document creator can add only Smart Pages with a number of pages that is equal to the page divider. Brand Template Builder filters the search results and displays only Smart Pages with the appropriate number of pages for the document creator. Therefore, you must ensure that Smart Pages that match your page divider are available.

Associated Tasks

- *Configuring the Permitted Number of Pages for the Overall Document* below
- *Configuring the Permitted Number of Pages for Sections* on the facing page

4.2.7.3.1 Configuring the Permitted Number of Pages for the Overall Document

Note

You can configure this function only in basic templates that can be enhanced with Smart Pages (see *Enhancement with a Smart Page* on page 178).

1. Go to step 1 of Template Design.
2. Ensure that the *Document* radio button is activated for *Page divider valid for* in the *> Content > Pages* area.
3. Enter the page divider in the field below that.
4. Enter the offset in the *Page offset* field.
5. Optional: limit the number of pages for the sections:
    1. Go to step 5 of Template Design.
    2. Choose a section for which you want to define the minimum and maximum number of pages.
    3. In the *Min. number of pages* field, enter an appropriate value for the minimum number of pages for the section.

4. In the *Max. number of pages* field, enter an appropriate value for the maximum number of pages for the section.
5. Repeat steps b to d for each section whose number of pages you want to limit.

You have defined the number of pages with which the document creator can finalize the document.

4.2.7.3.2 Configuring the Permitted Number of Pages for Sections

Note

You can configure this function only in basic templates that can be enhanced with Smart Pages (see *Enhancement with a Smart Page* on page 178).

1. Go to step 1 of Template Design.
2. Activate the *Section* radio button for *Page divider valid for* in the *> Content > Pages* area.
3. Go to step 5 of Template Design.
4. Choose a section.
5. Enter the page divider for this section in the *Page divider for page block selection* field.
6. In the *Min. number of pages* field, enter an appropriate value for the minimum number of pages for the section. Note that the value must be either 0, the page divider number, or a multiple of the page divider.
7. In the *Max. number of pages* field, enter an appropriate value for the maximum number of pages for the section. Note that the value of the page divider must be the page divider number or a multiple of the page divider.
8. Repeat steps 4 to 7 for each section for which you want to set the permitted number of pages.

You have defined the number of section pages with which the document creator can finalize the document.

4.3 Help Sections and Process Specifications

You can support the document creator with a series of measures during editing and preset process steps:

- *Check Features* below: configure measures to assist the document creator in entering texts and using images.
- *Help Tools* on page 216 for text boxes and *Help Tools* on page 236 for image boxes: for each change to content in text and image boxes, you can provide sections for the document creator in the form of descriptions or test specifications. Note that you integrate these help sections into the previous step *Processing Rules* on page 167, because help sections can be reconfigured for each variant.
- *Advanced Layout* on page 293: to make document editing more user-friendly when the document contains a large number of variables, use the advanced layout.
- *Customizing Process* on page 296: as the template designer, you can preset various items for the Customizing process, such as an approval workflow and mandatory steps before editing the document.
- *Production* on page 299: as the template designer, you can define the format in which the document can be output and whether the finished document can be sent to a printing service.

Next Step

In the last step, you finalize the template and request approval if necessary (see *Finalization and Release* on page 302).

4.3.1 Check Features

Brand Template Builder provides you with features for performing checks. You can use the check features to assist the document creator in using suitable images and correct spelling. You reach the fields in step 1 of Template Design.

Images

Field	Description
Minimum resolution in dpi	Choose the value for the minimum resolution in which you want the images used in the document to be available. If images with a lower resolution are used, the document creator is notified with a warning. The document creator can still finalize the document.
Recommended color space	Choose the color space in which you want the images used in the document to be available. • CMYK • RGB (includes sRGB) • CMYK & RGB If images with a color space that is not recommended are used, the document creator is notified with a warning. The document creator can still finalize the document.
Version check	Choose whether and how images from the Media Pool that are used in the document will be checked for available image versions. • *Do not search for new versions*: While the document is being created, no check for new image versions takes place. • *Search for new versions but ask before replacing*: While the document is being created, a check for new image versions takes place. Replacement of image versions must be confirmed in a dialog window. • *Always use the latest version of an image*: When a document is being created, the latest image version is used automatically without confirmation.
Allow only valid images	If the *Yes* checkbox is activated, the system checks whether the images used are valid (the *Valid from/to* field for the asset in the Media Pool). The check is based on both the alternative images defined in step 2 of Template Design and the images from the Media Pool that the document creator inserts in the document.

Text

Field	Description
Hyphenation	Specify the hyphenation language to be used when creating the document. The selection is made through custom structures. See the section below and *Text Control* on page 57.
Select spelling checker language	Specify the dictionary language that the text editor uses for the spelling checker when customizing text boxes. By default, no language is preset. The languages that can be selected are determined in a custom structure. See *Text Control* on page 57.

Configuring a Switchable Language for the Hyphenation

Note

You cannot use the BrandMaker system to define the languages for the hyphenation; instead, you can only switch between the languages available in InDesign. To change the hyphenation language in Brand Template Builder, you have to enable the hyphenation feature in the InDesign document.

Prerequisite

The switchable hyphenation languages must be created as custom structures. See *Text Control* on page 57.

1. Create a template dropdown that you want to link with the custom structure. Specify that the hyphenation language can be selected in step 1 of the customizing wizard. For information about configuring the template dropdown, see *Dropdowns* on page 353.
2. Enable the *Hyphenation for documents* checkbox. Click and select the template dropdown.

During document customizing, the hyphenation can switch between the language defined in the layout file and the languages mapped through the custom structure.

Next Step

In the next step, you choose whether an advanced layout is used (see *Advanced Layout* on the facing page).

4.3.2 Advanced Layout

To make document editing more user-friendly when the document contains a large number of variables, use the advanced layout.

Prerequisites

- The template is a basic template or Smart Page. An advanced layout cannot be created for Smart Groups.
- The template does not contain any grids. It must fulfill two conditions in this regard:
  - In step 1 of Template Design, the *Smart Grids are placed here* field in the *Content* area must be set to *Document boxes*.
  - In step 3 of Template Design, there must be no box marked as a Smart Grid in the template.
- No variants are mapped in the template.

What Can Be Changed in the Advanced Layout?

You can use the advanced layout to change the editing boxes of variables on the *Content* tab in the document editor. You have the following options:

- Define the height and width of the editing box
- Change the position of the editing boxes using drag and drop (for example, place editing boxes next to each other)
- Specify the displayed formula elements (for example, edit the help text displayed or the editing box title and translate them if necessary)

Associated Tasks

- *Creating an Advanced Layout* below
- *Deleting an Advanced Layout* on page 295

Next Step

In the next step, you set specifications for the *Customizing Process* on page 296.

4.3.2.1 Creating an Advanced Layout

*Prerequisite*You have created all the text and image variables.

1. Go to step 3 of Template Design.
2. In the *Advanced layout* area, choose *Edit*.

   Your template is opened directly in the document editor.
3. Open the *Content* tab.
4. Activate the checkbox *Show all editable content on current page*.
5. Select a page for which you want to configure an advanced layout.
6. Choose *Edit* below the checkbox *Show all editable content on current page*.

   The tab opens in edit mode.
7. Optional: change the name of the editing box
   1. Click the name of the box.

      A dialog box opens.
   2. Enter a name for the variable.
   3. If you want to translate the name:
      1. Choose .
      2. Select the language in which you entered the name.
      3. Choose *Next*.
      4. Enter the required translations.
      5. Click *Save*.
   4. Click *Save*.
8. Optional: activate or deactivate the editing box elements
   1. Click the gear wheel.

      A menu opens in which you can activate or deactivate the visibility of specific elements in the editing box. All the elements are activated by default. For example, you deactivate the help section if you did not specify a help text for the variable in step 4 of Template Design. The elements available in the editing box are:

      - Label: the editing box name.
      - Help: the display of the help text that you entered for the variable in step 4 of Template Design.
      - Restore: the *Restore original text* feature is available only for text variables.

- Separator line: separator line in the bottom area of the editing box that acts as a visual separator for the next editing box.
- Special characters: *Special characters* picklist that can be used to add special characters to the text variables.

2. Activate or deactivate the editing box elements.
3. Click the gear wheel to close the menu. Alternatively, click the X on the menu.

9. Optional: change the position and size of the editing box
    1. Click an editing box.

       A gray frame is displayed around the box.
    2. Click the frame with the mouse and hold down the mouse button. Drag the editing box to make it smaller or larger.

       Note: note that the box is enlarged only if the variable has sufficient room underneath. You may first have to move the neighboring editing boxes.
    3. Click the editing box and drag the editing box to the desired position using drag and drop.

       Note: note that the editing box can be repositioned only if you position it in a completely free space. You may first have to enlarge the *Content* tab to free space for a new position.
10. Repeat steps 7 to 9 for all the editing boxes on the page that you want to adapt in the advanced layout.
11. Repeat steps 5 to 10 for all the pages in your template.
12. Choose *Save and close*.

The template is displayed in Template Design again. You have created an advanced layout.

4.3.2.2 Deleting an Advanced Layout

1. Go to step 3 of Template Design.
2. In the *Advanced layout* area, choose *Delete*.

You have deleted the advanced layout. The default editing boxes are displayed for the document creator again on the *Content* tab.

4.3.3 Customizing Process

As the template designer, you have the option of presetting the following items for the Customizing process. You edit most of these items in the *Process* area in step 1 of Template Design.

Step 1: Mandatory Steps before Editing Content

If you select the *Variant* selection checkbox, the document creator must select the variant of the document before the document can be edited.

Step 1: Approval Workflow

Define the approval workflow that must be performed after the document is edited. You can manage and edit workflows under *> Administration > Data Structures & Workflows > Workflows*. For more information, see *Additional Documentation* on page 424 in the administration manual.

You also determine whether the approver and requester can discuss with each other during the approval process. If you want to allow this, activate the checkbox *Allow comments during the approval workflow*. Then the approver and requester can access the request under *> Brand Template Builder > Manager > Releases > Documents* and use the *Add Comments* function.

Step 1: Configuring the Document Editor

The document editor provides a variety of functions that you can activate in the configuration (see *Document Editor* on page 50). This provides the following benefits:

- You can simplify editing for the document creator, because only the functions that the document creator requires are accessible.
- You can deactivate document editor functions in a configuration. If you assign the configuration to a template, the document creator can no longer access these functions. This allows you to prevent certain kinds of editing.

In step 1 of Template Design, you can assign a configuration to the template. Choose a configuration in the *Editor preset* picklist.

Note

An administrator creates the various configurations of the Document Editor. If you have any questions, contact the administrator. Note that many different settings depend on the configuration of the document editor, for example, the automatic naming of the document according to different patterns, available editing functions (also depending on the tab), the display of help texts, and so on.

Step 1: Exporting and Importing Documents

Choose whether documents can be saved directly from the document editor as an INDD using the *Export to print template* function. A locally saved document can be uploaded again with the *Import from print template* function. Note that the document creator can use these functions to make changes to the INDD file.

Use the radio buttons in the *Documents can be exported and imported* area to specify whether exports and imports are permitted.

Step 1: Real-time Preview

Activate the checkbox if you want the Real-time preview function to be available while customizing the document. Note that each change is rendered in the document immediately when you activate the real-time preview. This may result in a heavy load on the rendering server.

Step 4: Supplement of an automatically assigned name

Note

The function described below is only available in Step 4 under the following conditions:

- You selected a text variable in step 4.
- In step 1, you have chosen a configuration of the Document Editor in which the automatic document naming follows one of the following patterns
  - <Template Name> - <Variable(s)>: The name is composed of the template name and the values of text boxes, which the designer marks accordingly in the template design step 4. Several variables are separated by a space.
  - <Variable(s)>: The name is composed of the values of text boxes, which the designer marks accordingly in the template design. Several variables are separated by a space.

Activate the *Use value as document name* checkbox if you want the contents of the text variable to become part of the name of the documents. Note that this is a default name that the document creator can change or add to.

EXAMPLE

You have a variable in which a discount value is entered, e.g. the field is preset with the value 10 [%]. The checkbox is activated for this variable.

If the document creator enters the value 20 [%] and then creates the document name, the value 20 is added to the document name.

Note that if the document creator first creates the document name and then edits the variable, the value 10 is added to the document name.

Next Step

In the next step, you define the options for outputting the created document (see *Production* on the facing page).

4.3.4 Production

As the template designer, you have the option of presetting the following items for outputting and producing the document. You edit these items in the *Output* area in step 1 of Template Design.

Output Method

The output method specifies which format and which properties are used to output a document. For example, a high or low-resolution PDF or an EPS can be generated from a document. To ensure that the document creator can output INDD documents, the InDesign renderer must be configured accordingly with the required output methods (see *Output of INDD Documents* on page 83).

Activate the formats in which you can output the finalized document in the *Output method* area in step 1 of Template Design.

Then define the standard methods for distributing documents based on the template. To do this, in the selection lists *Preselected for...* define one output method each for the following distribution channels:

- Downloading and saving the document
- Sending the document by e-mail
- Printing the document

If you select the checkbox *User can't change the preselected value.* in the respective selection list, the document creator cannot use any other output method in this channel. This ensures, for example, that only printable formats are used for printing.

Outputting Pages

In the *Output format* area, you define whether the documents are to be printed as *Single pages* (one below the other) or *Arranged pages* (as arranged in subsequent printing, e.g. as print sheets). If the item can be output both as individual pages or as arranged pages, choose which setting is preselected in the *Preselected* picklist.

Crop Marks

You can use the output methods to add crop marks to the documents. When you select *Cut marks*, you specify whether the setting applies to the documents based on the current template. If the output method allows it and you activate the *Yes* radio button, then crop marks are output.

Options for Print Orders

You use these options to specify whether and how the finalized document can be printed directly. In the *Options for advertising material production* area, select one of the following options:

Do not select a printing service or warehouses: With this option, the document creator can send the document as an e-mail or download it. If printing is required, the printing must be triggered outside of the BrandMaker system.

Select printing service only: The document creator can download the document or send it in an e-mail to a printing service automatically, together with the relevant order data. As the orderer, the user is automatically sent the print product. The user address information stored under *> User name > My data > Settings* is used to do so.

Select printing service, warehouse and further recipients: The user can download the document or send it in an e-mail to a printing service automatically, together with the relevant order data. The user can choose whether and in what arrangement the print product is sent to him or her and/or one or more warehouses. The warehouses correspond to the suppliers created in the Marketing Shop module.

Note

Note that some of the options may be unavailable in your system under some circumstances. This depends on a setting that the administrator selects in the system setting. See *Configuring Template Design* on page 49.

Price List for Printing Services

If the finalized document can be sent to a printing service, you can select a price list to use as the basis for calculating the printing costs.

Note

This is visible only if *Options for advertising material production* is set to *Select printing service only* or *Select printing service, warehouse and further recipients*.

Select the price list based on which the printing costs for a document are calculated. The price lists are defined with the required information, such as the graduated prices, under *> Administration > Data Structures & Workflow > Price Lists*. For more information, see *Additional Documentation* on page 424 in the administration manual.

Order Quantity

Choose whether the document can be ordered in the defined bundles or in freely set quantities.

Manual input The document creator can order any quantity.

*Template-specific bundles*Enter the number and description. Click to create the description in different languages. Choose *Add* to close the entry. To create additional bundles, repeat the process. The ordering user chooses from the packages you specify.

*Bundles from price list*Select one of the available price lists. The ordering user can select packages defined in this list. It is not possible to describe the packages to the ordering user.

Publication in the Media Pool

If you want to allow the document to be published to the Media Pool in step 5 of the customizing wizard, activate the *Yes* checkbox in the *Documents can be published in module Media Pool*. An INDD file is automatically created from the finalized documents and created as a new asset in the Media Pool. In the Media Pool, the asset can be opened and edited in Brand Template Builder using the function *Adapt to your own requirements*. The changed document can also be published in the Media Pool.

Next Step

In the last step, you finalize the configuration of the template and request its approval if necessary. See *Finalization and Release* on the next page.

4.4 Finalization and Release

To finalize and, where necessary, request approval for the template, go to step 6 of Template Design. This step summarizes the settings made in the previous steps as well as other information about your template.

In addition to the template properties, a page preview and all custom objects are also shown. Check the configurations that you made. You can also *Test* on page 360 the template editing here again.

To complete the template design, click *Finish*.

Note

If you selected a VDB that requires approval in step 1, the template is sent to the corresponding workflow. The template is displayed in the *My current templates* list under *Waiting for approval*.

You can search for and use finished and approved templates using the template search. Click > *Template Design* > *My Finalized Templates* to display a list of your finished templates.

5

Create Online Template

Prerequisites

To create an online template, you need to add the directory containing the source directories and the JSON files to a ZIP archive. Note that it is not sufficient to zip the contents of the directory; this ZIP file would not be recognized as an online template.

Create template

1. Click *> Brand Templates > Templates > New Online Template*.

   The *New Online Template* dialog is displayed.

2. Drag-and-drop the ZIP file containing the directory with the sources and the JSON files onto the upload area. Alternatively, click the upload area and select the ZIP file in the dialog that appears.
3. Click *Save*.

The file is checked. Provided that the JSON contained in the configuration files is valid, the files are created as an online template. The online template can then be used directly by document creators.

In case of error messages, check the JSON code by an appropriate validator if necessary, correct the errors, and save both the corrected file and the ZIP file again. Then upload the ZIP file again.

Next steps

There is no further effort for those as designers. Note that you cannot access online templates under *> Brand Templates > Manager* or *> Brand Templates > Designer*. Otherwise, you manage online templates with the following actions:

- *Archiving a template* on page 378
- *Reactivating a Template* on page 379
- *Deleting a template* on page 380

6

Creating an HTML Template

When you create an HTML template, you specify which elements, content, and properties of the HTML document the document creator can edit. When doing so, you work through the following points:

1. Creating an HTML file as a ZIP: to ensure that you can use an HTML file in Brand Template Builder for an HTML template, you must compile all the corresponding files in a ZIP file. A folder hierarchy is permitted. This requires a unique name for images that are stored in the different folders. You can view more specifications for the files in *HTML File* on page 152.
2. *Creating the Template* on the facing page: you then create the template.
3. *Processing Rules* on page 311: in this step, you define the processing rules for the document creator. The rules define how the document creator can change texts and images.
4. *Help Sections and Process Specifications* on page 344: you can support the document creator with a series of measures during editing and preset process steps.
5. *Finalization and Release* on page 350: to finalize and, where necessary, request approval for the template, go to step 6 of Template Design. This step summarizes the settings made in the previous steps as well as other information about your template.

6.1 Creating the Template

When you have zipped all the required HTML files, use them to create an HTML template:

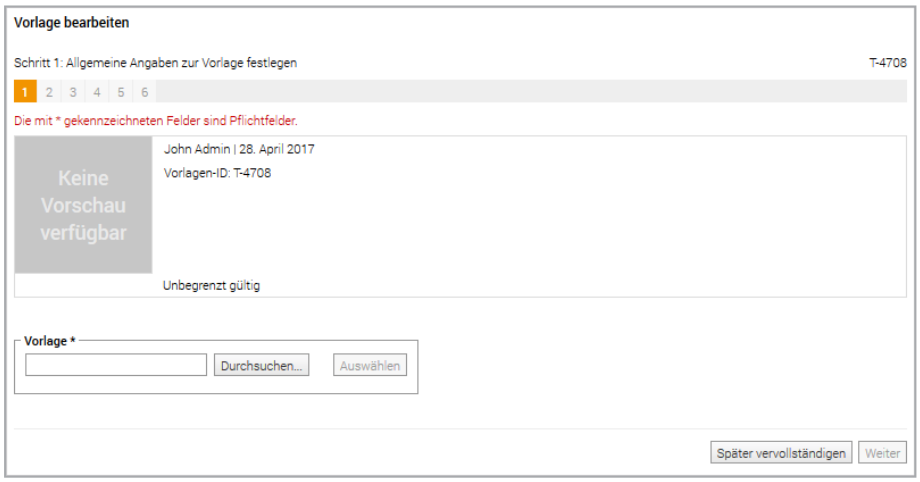
- *Selecting the HTML File* below: to create an HTML template, go to Template Design and select the file.
- *Properties of the HTML Template* on the next page: you then edit the properties of the template. The properties are used to describe the template and make it easier to find.

6.1.1 Selecting the HTML File

To create an HTML template, you must first open the template design. You have two options to do this:

- Under > *Templates*, click *New HTML Template* in the upper right corner.
- Click > *Designer* and then select *New HTML Template* in the navigation on the left.

This opens the *Edit template* page in step 1:



Selecting an HTML File

1. Choose *Browse*.

   A dialog box opens in which you can browse your file system.

2. Search for the ZIP file and select the file.
3. Choose *Open*.

   Step 1 of Template Design is displayed.

4. Choose *Select*.

The ZIP file has been loaded.

Next Step

In the next step, you edit the *Properties of the HTML Template* below.

6.1.2 Properties of the HTML Template

The properties are used to describe the template and make it easier to find. An HTML template can have the following properties. You reach the properties in step 1 of Template Design.

Properties

Name	Description	Filled automatically?	Editable?
Owner	Name of the user that created the INDD template.	Yes	No
Creation date	Date on which the template was created.	Yes	No
Template ID	Unique identification number for the template, which is generated automatically by the system (prefixed with a T)	Yes	No
Template name	Prefilled with the ZIP file name	Yes	Yes
Tags	Tag indexing for the template	No	Yes
Categories	Selection using the approved categories for Brand Template Builder	No	Yes
Virtual DB	VDB selection	No	Yes

Name	Description	Filled automatically?	Editable?
Information for the user	Additional information about the template, such as the target group or area of application. The entries are displayed at the following points: • In the hit list together with the technical details • In the template details in the customizing wizard • In the details about the document in the document editor	No	Yes
Validity periods	Specify whether validity periods can be set for the template and document based on it. For this purpose, the checkboxes *Validity period of the template is configurable.* and *Validity period of the document is configurable.* are displayed. If the first checkbox is enabled, you can set a validity period for the template. In this case, the second checkbox is automatically checked as well and cannot be changed, i.e. the document creator can also set a validity. If the first checkbox is disabled, you can use the second checkbox for documents to choose whether the document creator can set a validity. If the second checkbox is disabled, the document creator will not see any validity fields in the document's properties-edit dialog. Note: After a migration from version 6.9 or older to version 7.0 or younger, the checkboxes are enabled for migrated templates. When new templates are created, the checkboxes are disabled by default.	No	Yes

Custom Properties

The standard properties may not be sufficient to characterize your templates. An administrator can therefore create suitable properties and their values, see *Custom Properties* on page 38. As the designer, you assign the values of the properties to the template in step 1 of template design in the *Custom Properties* area.
You can also use one of the properties as a grouping property to group templates under it. This allows the document creator to find the templates faster and easier. Templates with the same value in the grouping property are displayed as a tile in the search results.

Note

Contact your system administrator if you have questions about the custom properties and a grouping property. The system administrator manages the custom properties and can explain their intended use.

1. Select a property from the *Custom Properties* drop-down list.

   In the *Values of Custom Properties* list, associated values are displayed.
2. Select a value of the custom property.
3. Click the plus sign.

The value of the property is assigned to the template.

Next Step

In the next step, you define the processing rules for the template.

6.2 Processing Rules

In this step, you define the processing rules for the document creator. The rules define how the document creator can change texts and images. Work through the following steps:

1. *Multilingualism* below: Specify how many languages (locales) the document should contain. You also define to which locale the formula and date variables are assigned.
2. *Content of Text Boxes* on page 313: first, define whether and how the document creator can change the content of text boxes.
3. *Content of Image Boxes* on page 325: in this step, you define the editing options for image boxes.
4. *Variants* on page 339: you use the variants function if the content of boxes and their editing changes based on a characteristic.

Next Step

In the next step, you set up *Help Sections and Process Specifications* on page 344 for the document creator.

6.2.1 Multilingualism

As a designer you have the possibility to structure the variables in the document that are dependent on a locale according to languages. You create templates from which documents with up to 10 languages can be generated.

In the first step you determine how many locales are used in the document. These locales are numbered consecutively: Primary locale, locale #2, locale #3, etc. Then you assign the numbers to the variables, for example a date variable in the main section to the primary locale. In the next section, which should be displayed in a different language, the date variable is assigned to locale #2:

> **Note**
>
> This assignment is only possible for variables whose content depends on a locale: formula or date variables. Other content such as texts must be translated by the document creator, for example, or be provided translated by you as a text alternative.

The document creator decides which locale is used for which number, e.g. primary locale is *United States* and locale #2 is *China*. According to the setting the contents of the variables are calculated or displayed:

Define Amount and Default Locales

1. Switch to step 1 of the template design.
2. Activate the checkbox *Enables configurable locales*.
3. Specify the number of locales required in the *Amount of locales* selection list in the *Document Locales* area.

   Depending on the number selected, one additional *Standard value for ...*selection list is displayed for each locale.
4. Set a default for each locale in the document, for example, *United States* for the primary locale, *Germany* for locale #2, and so on.
5. Under it, define whether the document creator determines the languages when creating the document (radio button *Yes*) or later when entering the document properties (radio button *No*).

You have defined the number and default locales for the template.

Replacement Styles

Typically, fonts do not cover the entire Unicode character set. To use the correct character set for each locale, it is possible to define so-called replacement styles in the administration. Replacement formats are only used with defined locales.

You can find more information in the Administration manual, see *Additional Documentation* on page 424.

Related Tasks

Once you have determined the number of locales, you must assign the locales to the variables. Note the following sections:

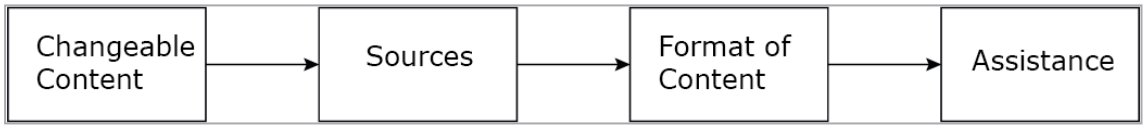
- Formula variable: *Content of Text Boxes* below
- Date variable: *The Format of the Content* on page 321

Next Step

In the next step, configure the content of the boxes, e.g. whether the content can be changed at all or is provided by an external source. Since the configuration of text and image boxes differs considerably, the configuration of text boxes is described first, see *Content of Text Boxes* below. If you would like to go directly to the configuration of image boxes, please read the section *Content of Image Boxes* on page 325.

6.2.2 Content of Text Boxes

You configure text box content editing for the document creator in the following steps:



Which Content Can Be Changed?

In the first step, you define whether a text box is fully changeable. If you do not want a text box to be changed, select the *Not changeable* setting.

For more information, see the section *Changeable Text Box Content* on the next page.

Source: Who or What Supplies the Content?

In this step, you define who or what fills the text variables that you defined in the first step. You can choose from a variety of sources, such as the entry made by the document creator, centrally maintained tables, or a calculation by a formula. You can also combine various sources with each other.

For more information about configuring and combining sources, see *Sources for Text Variables* on page 315.

Format: How Is the Content Processed and Checked?

Choose whether the content is displayed as text or whether it is a date. In this case, you can specify the country-specific date format in which the content is displayed or has to be entered. For more information, see the section *The Format of the*

Content on page 321.

Which Help Tools Provide Support for the Document Creator?

You can support the document creator with various help tools while they edit the document. For example, you can enter help texts with a description of the variables or recommend a text character count for the document creator.

For more information, see the section *Help Tools* on page 322.

Next Step

Once you have configured the settings above for all the text boxes, you have specified how the content of the text boxes can be changed. In the next step, you configure how the *Content of Image Boxes* on page 325 can be changed.

6.2.2.1 Changeable Text Box Content

Choose whether all the content of the text box is changeable. Text variables are automatically created for the changeable content.

The Content of a Text Box Is not Changeable

If you do not want the content of a text box to be edited, select the *Not changeable* setting in the *Content* area in step 3. You then do not need to perform further work steps for this box. The document creator cannot change the content of the box.

The Content of Text Box is Fully Changeable

When you select this setting, the content can be fully replaced. A text variable that the document creator can use to fully change the content of the text box is created automatically. You enter the source for this text variable in the next step.

Configuring a Fully Changeable Text Box

1. Go to step 3 of Template Design.
2. Choose the text box that you want to be fully changeable. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select the *Fully changeable* setting.
4. Test the configuration. See *Test* on page 360.

A text variable is automatically configured for the text box.

Next Step

In the next step, configure the *Sources for Text Variables* on the facing page.

6.2.2.2 Sources for Text Variables

In this step, you define who or what fills the text variables that you defined in the first step. You can choose from a variety of sources, such as the entry made by the document creator, centrally maintained tables, or a calculation by a formula. You can also combine various sources with each other.

Free Entry by the Document Creator

In this case, the actual document creator can create content.

1. Go to step 4 of Template Design.
2. Choose the variable that you want the document creator to freely edit. See *Box and Variable Navigation* on page 416.
3. Ensure that the *Edit and alternative elements* setting is selected in the *Editing options* list.
4. Ensure that none of the *Alternative texts* are activated.
5. Test the configuration. See *Test* on page 360.

The document creator can enter content in the variable.

Default Alternatives Set by the Template Designer

As the template designer, you can specify default alternative content that the document creator can only choose from.

1. Go to step 2 of Template Design.
2. In the *Alternative texts* area, add the alternative content in the *New text content* free text field.
3. Click the arrow button .

   The content is created as an *Alternative text*.
4. Repeat steps 2 to 3 for all the alternatives that you want to make available to the document creator for selection.
5. Go to step 4 of Template Design.
6. Choose the variable to which you want to assign the alternative content. See *Box and Variable Navigation* on page 416.
7. In the *Editing options* list, select *Predefined images only*.
8. In the *Alternative texts* area, activate the checkboxes of the texts that you want to make available for the document creator to select for this variable.
9. Test the configuration. See *Test* on page 360.

You have created alternative content for the variable and made it available to the document creator for selection. The document creator cannot change the content.

Combination of a Free Entry and Default Alternatives

In this case, you set the default alternatives but also allow editing by the document creator.

1. Go to step 2 of Template Design.
2. In the *Alternative texts* area, add the alternative content in the *New text content* free text field.
3. Click the arrow button .

   The content is created as an *Alternative text*.
4. Repeat steps 2 to 3 for all the alternatives that you want to make available to the document creator for selection.
5. Go to step 4 of Template Design.
6. Choose the variable to which you want to assign the alternative content. See *Box and Variable Navigation* on page 416.
7. In the *Editing options* list, select *Edit and alternative elements*.
8. In the *Alternative texts* area, activate the checkboxes of the texts that you want to make available for the document creator to select for this variable.
9. Test the configuration. See *Test* on page 360.

The variable can be edited by the document creator, who can also select from your predefined content.

Centrally Maintained Content from a Custom Structure

You choose *Custom Structure* to define a table as a source. The table is maintained centrally in the system. You also choose the attribute (that is, the table column) and therefore the type of value (for example, the *Weight*). The document creator chooses the line (for example, *product A*), and its weight of *1.2 kg* is displayed in the document.

*Prerequisite*You have created a dropdown that is linked to a custom structure. For more information, see *Dropdowns* on page 353.

1. Go to step 4 of Template Design.
2. Choose the variable that you want the custom structure to fill. See *Box and Variable Navigation* on page 416.

3. On the *Apply structure and attribute:* input field, choose the button.

   The *Template Dropdowns* dialog box is displayed.

4. Select the template that you want to use as the source.
5. Select the attribute (i.e. the column) from which the value should be taken.
6. Choose *Apply and close window*.
7. In the *Editing options* list, select the *Hide* setting.
8. Test the configuration. See *Test* on page 360.

The document creator can only choose a value from the custom structure. The value is displayed in the variable.

Note

You can also specify that the document creator can choose between alternatives and enter content himself or herself. See the section *Combinations* on page 320.

User Data Available in the System

With this source, the variables are filled using the system data available to the document creator. This data includes:

- User data
  - Address
  - First name
  - Last name
  - E-mail address
  - Organizational unit
- User delivery address:
  - Street
  - Street number
  - Optional address information, field 1
  - Optional address information, field 2
  - ZIP code

- City
- State
- Country

With the exception of the e-mail address and organizational unit, the user can edit the data under *> Your user name*.

EXAMPLE

You are setting up a template for a job advert with one variable each to be filled with the system data *Last name* and *First name*. You also want to specify a personal contact in the job advert.
If your colleague Jane Public creates a document based on the template, she is entered as the contact person.

1. Go to step 4 of Template Design.
2. Choose the variable that you want the system data to fill. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select *System Data*.

   The *System data* field is displayed below the radio button.
4. Click the arrow button next to the *System data* field.
5. A list is displayed.
6. In the list, select the system data whose value you want to display in the variable.
7. The system data is displayed in the field.
8. In the *Editing options* list, select *Hide*.
9. Test the configuration. See *Test* on page 360.

The value from the system data for the relevant document creator is displayed in the document after it is refreshed. The document creator cannot change the value.

Note

You can also specify that the document creator can choose between alternatives and enter content himself or herself. See the section *Combinations* on page 320.

Formula

In this case, the content of a variable is supplied by a formula. This includes mathematical formulas and the possibility to merge the text from other text boxes in the variable. If the variable shows the result of a mathematical formula, the result is always shown with two decimal places, rounded if necessary.

Note that you cannot combine this source with other sources. Furthermore, the result displayed is always rounded to two decimal places where applicable.

1. Go to step 4 of Template Design.
2. Choose the variable that you want the formula to fill. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select *Formula*.

   The *Formula description* field is displayed below the radio button.
4. Enter the formula in the field. Refer to the description below.
5. In the *Locale* field, choose the country-specific number format to be used to display the result:
   - *Primary Locale*:
     - Monolingual template: If the document creator specifies the locale of the document, e.g. *United States*, the number format of this locale is used, in the example 1,000,000.00.
     - Multilingual template: In the document, the variable uses the number format of the locale that the document creator specifies as the primary locale.
   - *Locale #2, #3* etc. (only for multilingual templates): In the document, the variable uses the number format of the locale that the document creator set as locale #2, #3 etc.
   - Any other locale: The variable will always use the localized value of your chosen locale. The choice of a locale for the document, single or multilingual, has no effect.
6. Test the configuration. See *Test* on page 360.

The variable displays the result of the formula in the selected format with two decimal places.

Entering the Formula

You can enter formulas as follows:

- The characters +, -, *, and / are permitted.
- You can structure expressions using brackets ().
- You can enter numbers.
- You can add other variables. Click the arrow button for a list of the available variables.

EXAMPLE

You want to display a net price in a variable. You use a custom structure to provide the gross price in a different variable. 2.5 % is to be deducted from the gross price.

1. First, link the variable that you want to contain the gross price with the custom structure and its *Gross price* column.
2. In step 4 of Template Design, choose the variable that you want to display the net price.
3. Select the *Formula* source.
4. In the formula field, use the arrow button to select the variable containing the gross price and multiply it by 0.975.

The variable displays the net price.

Combinations

If you are filling a variable with a formula, you cannot use another source.

However, you have the option of replacing the value, system data, or a custom structure either with an entry made by the document creator or with your alternatives or your combination. The steps for which you select *Hide* in the *Editing options* list are then omitted from the instructions. Instead, carry out the instruction that either activates the entry made by the document creator, your selection of alternatives, or your combination.
If you want to include the entry made by the document creator in a combination, you can also enter a default text. When using system data, note that the default text is visible only if the document creator has not filled the system data (for example, when the delivery address is empty).

Next Step

You then choose whether the entered or supplied value is a text or a date (see the section *The Format of the Content* below). If you have configured the *Formula* source, this step is omitted and you can set up *Help Tools* on the next page for the document creator directly.

6.2.2.3 The Format of the Content

You specify the format of the variable content either as *text* or a *date*. You define the content type in the *Content* area in step 4 of Template Design. You choose between the following types:

- *Text*: the content is a text. If necessary, you can configure a validation rule in the *Help Sections and Process Specifications* on page 344 for text boxes.
- *Date*: the content is a date. You can configure a pre-assigned date and the date format.
    - *Pre-assignment*: click below the radio buttons to select the date in a calendar view.
    - *Date format*: you specify the format in which the document creator must enter the date in the *Locale* picklist below the radio buttons:
        - *Primary Locale*:
            - Monolingual template: If the document creator specifies the locale of the document, for example *United States*, the date format of this locale is used, in the example mm.d-d.yyyy.
            - Multilingual template: In the document, the variable uses the date format of the locale that the document creator specifies as the primary locale.
        - *Locale #2, #3* etc. (only for multilingual templates): In the document, the variable uses the date format of the locale that the document creator set as locale #2, #3 etc.
        - Any other setting: The date is displayed in the format you specify. Choosing a locale for the document, mono- or multilingual, has no effect.

Note

The Content area in step 4 of Template Design also displays the *Number* format. The *Number* format is available only if the source of the variable is a formula. For more information, see the section *Sources for Text Variables* on page 315. In this case, you can skip this step and go directly to the configuration of the *Help Tools* below.

Next Step

In the next step, you configure the *Help Tools* below to make it easier for the document creator to edit the variables.

6.2.2.4 Help Tools

This section explains which help tools you can provide for the document creator while they edit the text box content.

Note

If you want to control the display of multiple input fields for variables in the document editor, see the section *Advanced Layout* on page 345.

The following options for providing help tools are available to you:

Help Text

Enter a description of the text variables in the *Help text* field in step 4 of Template Design. For example, you can inform the document creator about which type of content is to be entered in the variable. This allows you to make it easier for the document creator to edit the variables.

Processing Order for Fields

Note

The function is unavailable if you are using an *Advanced Layout* on page 345 on the page.

If you want to recommend a processing order for the document creator, define the *Position of the input box*. Enter a numerical value in the field in step 4 of Template Design. The fields containing the lowest value are displayed at the top of the *Content* tab in the document editor.

Mandatory Field

If you activate the *Mandatory field* checkbox for a text variable in step 4 of Template Design, the variable must be filled by the document creator. If you do not activate the checkbox, the document creator can finish editing the document even though the field is empty.

Checking the Content

Two features are provided for you to check the filled content:

Rules

Document creators frequently have to enter telephone numbers or e-mail addresses. To ensure that the entries are correct, you can define a validation and replacement rule.

One rule each for telephone numbers and e-mail addresses are available as predefined rules.

To create a rule, proceed as follows:

1. Click *Customize Rule*.

   The *Validator and Beautifier Rules* dialog is displayed.
2. Enter a regular expression for the validation in the *Rule* field.
3. In the *Message* field, enter a short and concise description as information for the document creator. Click the globe icon to enter the message in different languages.
4. If you want to have automatic correction made, click the *New Rule* button in the *Beautifier* section.

   The *Beautifier* dialog is displayed.
5. Enter one regular expression each for the search rule and the replacement.
6. Click *Save*.
7. Repeat steps 4 to 6 if necessary.
8. Click *Save* to save your entries.

You have created a rule.

Recommended Character Count of Text

> Note
>
> This function is available only if the content is displayed in the *Text* format (see *The Format of the Content* on page 215).

Enter a value for the recommended text quantity. If you enter a value, a warning message is displayed if the user exceeds this character count. The user can ignore the warning.

Functions for Editing the Content

> Note
>
> This function is available only if the content is displayed in the *Text* format (see *The Format of the Content* on page 215).

Select an editor configuration from the *Editor* picklist. This lets you specify which editing functions are available to the document creator while editing the text (e.g. *Bold* and *Italics* text formatting or special characters). If you have any questions, please contact the responsible module or system administrator that manages the editor configurations.

The *Simple text (one paragraph)* configuration allows the document creator to enter text without formatting. In the case of *Simple text (one paragraph)*, the system interprets the entry of a return as a soft return.

Height of the Input Box

> Note
>
> The function is unavailable if you are using an *Advanced Layout* on page 345 on the page.

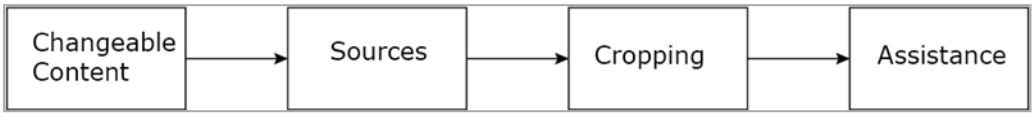
Define a value for the height of the input field on the *Content* tab in the document editor (for example, three lines). You make an entry to adapt the field in which the default text is displayed and therefore improve the display.

Next Step

After defining the help tools, you have completed the configuration of the content of the text boxes. In the next step, you configure the *Content of Image Boxes* on the facing page.

6.2.3 Content of Image Boxes

You configure image box content editing for the document creator in the following steps:



Which Content Can Be Changed?

When using image boxes, you can choose whether the box is not changeable or fully changeable. If the image box is fully changeable, the box can also be parameterized as a text-to-image box. This is useful when you want to display a header in a font type that is not available on the web. The user can enter text in text-to-image boxes during customizing. When the document is output, the text is converted into an image.

If you do not want an image box to be changed, select the *Not changeable* setting for the box.

For more information, see the section *The Variable Content of an Image Box* on the next page.

Source: How Is the Image Supplied or Selected?

Choose which source fills the image box. You choose between different sources; for example, you can let the document creator freely select from the images that he or she can access in the Media Pool. You can combine the various sources with each other.

For more information about configuring and combining sources, see *Sources for Image Variables* on page 330.

Which Section of the Image Is Displayed?

Choose which image section is displayed and whether the document creator can change the displayed section of the image. For more information, see the section *Image Section* on page 335.

Which Help Tools Provide Support for the Document Creator?

You can support the document creator with various help tools. For example, you can enter help texts with a description of the image box or recommend a processing order for the document creator. For more information, see the section *Help Tools* on page 337.

Next Step

Once you have configured the settings above for all the image boxes, you have specified how the content of the image boxes can be changed. In the next step, you can configure *Variants* on page 339. If you do not require variants, define the *Help Sections and Process Specifications* on page 344 for the template.

6.2.3.1 The Variable Content of an Image Box

Choose whether the content of an image box is variable.

The Content of an Image Box Cannot Be Changed

If you do not want the content of an image box to be edited, select the *Not changeable* setting in the *Content* area in step 3. You then do not need to perform further work steps for this box. The document creator cannot change the content of the box.

The Content of an Image Box is Fully Changeable

When you select this setting, the content can be fully replaced. You then define an image variable for which you configure the source in the next step. For more information, see *Configuring a Fully Changeable Image Box* on the facing page.

Text is Converted into an Image in the Image Box

If the image box is fully changeable, the box can also be parameterized as a text-to-image box. This is useful when you want to display a header in a font type that is not available on the web. The user can enter text in text-to-image boxes during customizing. When the document is output, the text is converted into an image. For information about creating a text-to-image box, see *Configuring a Fully Changeable Image Box* on the facing page.

To render the text customized later in an image, you can also enter special parameters using the frame options field. For more information, see *Displaying Text in Text-to-Image Boxes* on the facing page.

Next Step

In the next step, configure the *Sources for Image Variables* on page 330.

6.2.3.1.1 Configuring a Fully Changeable Image Box

Configuring a Fully Changeable Image Box

1. Go to step 3 of Template Design.
2. Choose the image box that you want to be fully changeable. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select the *Fully changeable* setting.
4. Test the configuration. See *Test* on page 360.

The image box is fully changeable. If the document creator edits the variable, the box image is replaced.

Configuring a Fully Changeable Image Box as a Text-to-Image Box

1. Go to step 3 of Template Design.
2. Choose the image box that you to configure as a text-to-image box. See *Box and Variable Navigation* on page 416.
3. In the *Content* area, select the *Text-to-image* setting.
4. Test the configuration. See *Test* on page 360.

The document creator enters text during customizing. An image is generated from the text when the document is rendered. For more information about displaying the text as an image, see the section *Displaying Text in Text-to-Image Boxes* below.

Next Step

In the next step, configure the *Sources for Image Variables* on page 330.

6.2.3.1.2 Displaying Text in Text-to-Image Boxes

In step 3 of Template Design, you can define how the text for a text-to-image box is to be displayed. An input field for doing so in which you can enter the display parameters is displayed in the *Content* area. The following parameters are available:

Parameter *background*

This parameter determines the background color of the image. Color texts, hexadecimal values, numeric color values (RGB, HSL, CMYK, and so on) or values from a custom structure can be entered as the value. The default value is *white*.

EXAMPLES

- background grey
- background "#fff000"
- background "rgb(100,100,100)"
- background transparent
- For a value from a custom structure: background {NAME_CUSTOM_STRUCTURE.NAME_ATTRIBUTE}, e.g. background {Layout.Basecolor}

Parameter *fill*

This parameter determines the pad color of the font. Color texts, hexadecimal values, numeric color values (RGB, HSL, CMYK, and so on) or values from a custom structure can be entered as the value. The default value is *black*.

Examples

- fill grey
- fill "#fff000"
- fill "rgb(100,100,100)"
- For a value from a custom structure: fill {NAME_CUSTOM_STRUCTURE.NAME_ATTRIBUTE}

Parameter *font*

This parameter determines the font. You can specify the font of the text or a value from a custom structure here. The following fonts are available:

Font type	Value in the parameter
Andale Mono	Andale Mono
Arial	Arial
Arial Black	Arial Black
Comic Sans MS	Comic Sans MS
Courier New	Courier New

Font type	Value in the parameter
Georgia	Georgia
Impact	Impact
Times New Roman	Times New Roman
Trebuchet MS	Trebuchet MS
Verdana	Verdana
Webdings	Webdings

EXAMPLES

- font Andale Mono
- For a value from a custom structure: font {NAME_CUSTOM_STRUCTURE.NAME_ATTRIBUTE}

Parameter *pointsize*

This parameter determines the font size. You can specify the font size or a value from a custom structure here.

EXAMPLES

- pointsize 12
- For a value from a custom structure: pointsize {NAME_CUSTOM_STRUCTURE.NAME_ATTRIBUTE}

Syntax

All of the parameters are listed next to each other, separated by a blank space.

EXAMPLE

background transparent -fill „#fff000" -font Times -pointsize 24

6.2.3.2 Sources for Image Variables

In this section, you can learn how to configure the various sources for image variables.

Free Selection by the Document Creator

In this case, the document creator selects images from the Media Pool or imports images. The document creator can choose from all the images available to him or her in the Media Pool. The document creator can also access his or her favorites or previously imported images through a quick access feature. With this setting, you grant the document creator the greatest possible amount of design freedom.

1. Go to step 4 of Template Design.
2. Choose the image variable for which you want the document creator to be able to freely select images. See *Box and Variable Navigation* on page 416.
3. Ensure that one of the *Predefined and additional images* settings is selected in the *Editing options* list. You choose whether the user can select the image section in the next step (see *Image Section* on page 335).
4. Ensure that none of the *Alternative images* are activated.
5. Ensure that the checkbox *Use search string for search in Media Pool* is deactivated.
6. Ensure that the *Search string for images* and *Image affiliate ID* fields are empty.
7. Test the configuration. See *Test* on page 360.

With the appropriate access authorization, the document creator can upload images from the Media Pool to the image variable. When doing so, the visibility of the images is not restricted by search strings or an affiliate ID. Furthermore, the document creator can upload images saved outside of the system to the document.

Alternatives from the Media Pool, Selected by the Template Designer

As the template designer, you can specify alternative images for the document creator to choose from. This feature allows you to restrict the selection options for the document creator to a small number of specific options. However, you can also use alternatives to make images that the document creator cannot access in the Media Pool visible to the document creator. You may have to do so if the document creator has no access to the Media Pool or VDB in which the required assets are stored.

> **Note**
>
> When selecting alternative images, ensure that the size, page ratio, and dpi amount of the individual images match the template. The Media Pool property *Suitable for Brand Template Builder* must be activated. Files of type PNG, JPG/JPEG and GIF are selectable. You can select a section in step 4 of Template Design.

> **Note**
>
> In Brand Template Builder, image files that are compressed as progressive JPEGs take much longer to render than image files that are compressed as Baseline JPEGs.

1. Go to step 2 of Template Design.
2. In the *Alternative images* area, choose:
   - *New image from My Favorites*: select one of the images listed in the picklist.

     The image is displayed above the picklists.
   - *All images from collection*: select one of your collections in the picklist.

     All the images from the collection are displayed above the picklists.
   - *Select a Different Image*: this opens the Media Pool search.
     1. Start the search.
     2. In the search results, activate the checkboxes on the images that you want to use as alternatives. The checkbox is displayed when you set the mouse on the image.
     3. Choose *Select* at the bottom.

     The selected images are displayed above the picklists.
3. *Optional*: if you have selected too many images, click the X on the superfluous images.

   The images are removed.
4. Repeat steps 2 to 3 until your desired alternatives are displayed.
5. Go to step 4 of Template Design.
6. Choose the image variable to which you want to assign the alternative images. See *Box and Variable Navigation* on page 416.

7. In the *Editing options* list, select *either Edit and alternative elements, cropping enabled* or *Edit and alternative elements, cropping disabled*. To specify a cropping, see the *Image Section* on page 335 chapter.
8. In the *Alternative images* area, activate the checkboxes of the images that you want to make available for the document creator to select for this image box.
9. Ensure that the *Search string for images* and *Image affiliate ID* fields are empty.
10. Test the configuration. See *Test* on page 360.

You have created alternative images for the image variable. The document creator cannot change any images.

Images from the Media Pool, Restricted Using a Search String

As the template designer, you can preset one or more search strings. The document creator then chooses from the Media Pool images that he or she can access and whose properties contain the search strings.

Note

Note that you can make this source available only to document creators that have access to the Media Pool module.

1. Go to step 4 of Template Design.
2. Choose the image variable for which you want the document creator to be able to select images. See *Box and Variable Navigation* on page 416.
3. In the *Editing options* list, select *Edit and alternative elements, cropping disabled*.
4. Enter one or more search strings in the *Search string for images* field. Separate the entries by a space to define multiple search strings. The document creator reaches images that match all search terms word-for-word (case-insensitive). Matches in parts of words do not result in a hit.
5. Ensure that none of the *Alternative images* are activated.
6. Ensure that the *Image affiliate ID* field is empty.
7. Test the configuration. See *Test* on page 360.

The document creator can upload images that meet the following criteria from the Media Pool to the image variable:

- The document creator can reach the images thanks to his or her access authorization
- The properties of the images contain the search strings

A maximum of 10 hits are displayed on the *Content* tab. The document creator can find additional hits on the *Tag images* tab under *> Add media*.

Images from an Affiliate from the Media Pool

As the template designer, you can preset an affiliate ID. The document creator then chooses from the Media Pool images that he or she can access and that are assigned to the affiliate.

- You specify a fixed affiliate. The document creator chooses from the Media Pool images that are accessible to him or her and assigned to the affiliate.
- You specify that images with the same affiliate ID as the document can be selected. The document is assigned the affiliate ID of the document creator when it is created. This allows the document creator to select images that are assigned to his or her affiliate.

Note

Note that you can make this source available only to document creators that have access to the Media Pool module.

1. Go to step 4 of Template Design.
2. Choose the image variable for which you want the document creator to be able to select images. See *Box and Variable Navigation* on page 416.
3. In the *Editing options* list, select *Edit and alternative elements, cropping disabled*.
4. Select:
    - *Filter by a specific affiliate ID* if you want to specify a fixed ID. In this case, enter the affiliate ID in the *Image affiliate ID* field.
    - *Filter by the affiliate ID of the document* if the document creator should select images assigned to his or her affiliate.
5. Ensure that none of the *Alternative images* are activated.
6. Ensure that the *Search string for images* field is empty.
7. Test the configuration. See *Test* on page 360.

The document creator can upload images that meet the following criteria from the Media Pool to the image box:

- The document creator can reach the images thanks to his or her access authorization
- The images are assigned to the affiliate ID, either a fixed one or the ID of the document creator.

Note

Please note that you cannot enter multiple affiliate IDs. However, you can enter parts of affiliate IDs. For example, if you enter the ID 1234567 for an 8-digit affiliate ID, any images with the affiliate IDs containing this number sequence are listed (for example, 01234567 and 12345670).

Custom Structure

You choose *Custom Structure* to define a table as a source. The table is maintained in the system by an administrator and contains standardized data. You also choose the attribute (that is, the column of the table) and therefore the image type (for example, *product image*). The document creator chooses the line (for example, product *A*). The product image for product *A* is then displayed.

*Prerequisite*You have created a dropdown that is linked to a customer structure. For more information, see *Dropdowns* on page 353.

1. Go to step 4 of Template Design.
2. Select the image variable that you want the custom structure to fill. See *Box and Variable Navigation* on page 416.
3. If the template is a Smart Group: in the *Image auto-selection* area, select the *None or from custom structure* setting.
4. On the *Apply structure and attribute:* input field, choose the button.

   The *Template Dropdowns* dialog box is displayed.
5. Select the template that you want to use as the source.
6. Select the attribute (i.e. the column) from which the image should be taken.
7. Choose *Apply and close window*.
8. In the *Editing options* list, select the *Hide* setting.
9. Test the configuration. See *Test* on page 360.

The document creator selects an image from the custom structure. The image is displayed in the image box and cannot be replaced with another image by the document creator.

Combinations of Different Sources

You can combine any sources with each other by changing the instructions described above accordingly. In doing so, note the following cases:

- If you combine the *Custom structure* source with another source, choose an option other than *Hide* from the *Editing options* list, based on the combination that you require.
- Combining *Search string* and *Affiliate ID* has an effect similar to two filters: the document creator can access only the images whose properties contain the search term and that are assigned to the affiliate.
- If you combine the *search string* and a *free selection by the document creator*, the *Use search string for search in Media Pool* checkbox provides you with two options:
    - *Deactivated checkbox*: the document creator can choose from the images that he or she can access and also receives a list of the images that are accessible to him or her and whose properties contain the search string. The list is a recommendation; that is, the document creator does not have to use an image from the list.
    - *Activated checkbox*: the document creator can choose only from the Media Pool images that he or she can access and whose properties contain the search string. The document creator can also further limit the search. This method is useful if the search with the search string returns a large number of hits.
      In addition, the document creator can import images without restriction and access his or her favorites and previously imported images.

Next Step

You then choose whether the document creator can select an *Image Section* below.

6.2.3.3 Image Section

Choose which image section is displayed and whether the document creator can change the displayed section of the image.

Please note that the ability to select a section depends on the source that you selected in the previous step (see *Sources for Image Variables* on page 330):

Free Selection by the Document Creator

If the document creator is allowed to freely choose from the available images, you as the template designer cannot specify the section shown. Your setting in the *Editing options* field determines whether the document creator can choose a section:

- *Predefined and additional images, cropping disabled*: the document creator cannot choose the section displayed.
- *Predefined and additional images, cropping enabled*: the document creator can choose the section displayed. Note that this option also applies to images that are filtered from the Media Pool using *Search string* or *Affiliate ID*.

Alternatives from the Media Pool, Selected by the Template Designer:

For this source, you or the document creator specify the clipping. You decide this with the setting in the *Editing Options* field

- *Edit and alternative elements, cropping enabled*: The document creator can choose only from the alternative images. You can preselect a section, but the document creator can specify a different section.
- *Edit and alternative elements, cropping disabled*: The document creator can only choose from the alternative images, but cannot specify a section for them. Only you can define a section.

You as the designer define the clipping

1. Go to step 4 of Template Design.
2. Choose the box to which the alternatives are assigned.
3. In the *Alternative images* area for the image with the section that you want to define, choose the image.

   The *Crop Image* dialog box opens.
4. Optional: change the unit in which the length and position values are displayed (e.g. in cm).
5. Optional: deactivate the *Keep ratio* checkbox if you want to change the aspect ratio of the section.
6. Position the rectangle on the desired image section. If necessary, change the size of the section.
7. Click *Save*.

8. Repeat steps 3 to 7 for each alternative whose displayed section you want to change.

For an alternative that is used in different image boxes, note that you must and can define the section again for each image.

Images from the Media Pool, Restricted Using a Search String

If you allow only this source, neither you nor the document creator can control the image section. To allow the document creator to choose an image section, you must combine the source with a *free selection by the document creator*.

Images from an Affiliate from the Media Pool

If you allow only this source, neither you nor the document creator can control the image section. To allow the document creator to choose an image section, you must combine the source with a *free selection by the document creator*.

Images from a Custom Structure

If you allow only this source, neither you nor the document creator can control the image section. However, the administrator that maintains the custom structure can preset an image section. To allow the document creator to choose an image section, you must combine the source with a *free selection by the document creator*. In this case, the document creator can also change the administrator preset.

Next Step

In the next step, you define the *Help Tools* below that you want to provide for the document creator.

6.2.3.4 Help Tools

This section explains which help tools you can provide for the document creator while they edit the text box content.

Note

If you want to control the display of multiple variables in the document editor, see *Advanced Layout* on page 345.

The following options for providing help tools are available to you:

Help Text

Enter a description of the image box in the *Help text* field in step 4 of Template Design. For example, you can inform the document creator about which type of content is to be entered in the variable. This allows you to make it easier for the document creator to edit the variables.

Processing Order for Fields

Note

The function is unavailable if you are using an *Advanced Layout* on page 345 on the page.

If you want to recommend a processing order for the document creator, define the *Position of the input box*. Enter a numerical value in the field in step 4 of Template Design. The fields containing the lowest value are displayed at the top of the *Content* tab in the document editor.

Mandatory Field

If you activate the *Mandatory field* checkbox for an image box in step 4 of Template Design, the box must be filled.

Automatic image selection

If images have to be selected for a document, you can set whether an image is automatically preselected in the *Automatic image* selection list. This simplifies image selection for the document creator.

The following options apply when searching for assets in the Media Pool or selecting alternative images stored in the template:

- *No automatic selection*: None of the found images will be selected automatically.
- *Automatic selection if exactly one image is found*: Only if exactly one image is found, it will be selected automatically. If more than one image is found, the document creator must select one image.
- *Automatic selection of the first image*: The first match is always selected automatically.

The options described apply to the following sources:

- Media Pool
- alternative images

If a custom structure or a data object is used as a source, you cannot edit the list because the respective image is preselected. If multiple sources are selected for the image, the sources are prioritized as follows: custom structure - data object - Media Pool - alternative images.

Next Step

After defining the help tools, you have completed the configuration of the content of the image boxes. In the next step, you can configure *Variants* below. If you do not require variants, define the *Help Sections and Process Specifications* on page 344 for the template.

6.2.4 Variants

You use the variants function if the content of boxes and their editing changes based on a characteristic.

EXAMPLE

You are designing an HTML document that you want to be able to adapt to various target groups. The document contains a central image and a text in which the reader is addressed directly. You have multiple target groups for whom the image and text editing differs:

- In the *Young Adults* variant, you want the document creator to select an image from multiple alternatives that you, as the template designer, specify. You also specify alternatives for the text, because you want the texts for this target group to be more informal.
- In the *Family* variant, you want to give the document creator more freedom: you do provide alternatives but also allow the document creator to freely select the images and edit your alternative texts. To ensure that the text address is slightly less formal, you enter a corresponding instruction in the help text for the text box.
- Since no images are available for the *Golden Ager* target group in your system, you allow the document creator to import images in this variant. However, since you want certain product features to be addressed in the text in any event, you only specify alternatives here.

Note

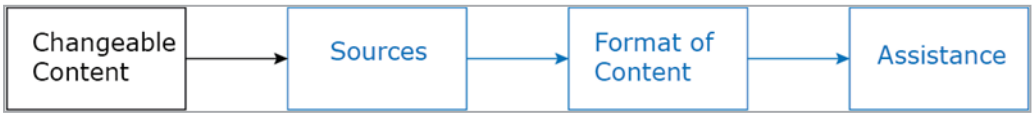
Functionally speaking, the process for creating variants is similar to the *Content of Text Boxes* on page 313 and *Content of Image Boxes* on page 325 work steps. For the sake of clarity, however, BrandMaker recommends that you first perform these steps for a default variant. You then configure the deviating variants as described in this section.

What Exactly Can Be Changed in a Variant?

The content of text and image boxes can change in variants.

Text Boxes

You configure the *Content of Text Boxes* on page 313 in four steps. In a variant, you can change the last three steps:

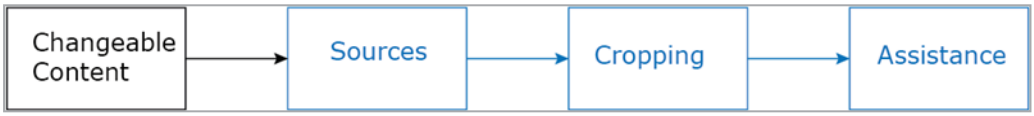


This means that you cannot change which part of a text box can be changed. The specified non-changeable text boxes and text variables are retained in each variant. However, you can configure a different source, format, and help sections for each text variable.

Alternatively, you can disable the editing of variables in variants.

Image Boxes

You also configure the *Content of Image Boxes* on page 325 in four steps. Like with text boxes, you can change the last three steps in a variant:



This means that you cannot change whether an image box can be changed and whether the box is a text-to-image box. However, for each variant, you can change the source, choose a different image section, and provide different help sections.

Alternatively, you can disable the editing of variables in variants.

Selector for Selecting a Variant

To allow the document creator to select a variant, you require a selector (that is, a picklist) in which a variant is assigned to each entry. These selectors are created with dropdowns in Brand Template Builder. For more information, see *Dropdowns* on page 353.

Associated Tasks

- *Configuring Variants for Text and Image Boxes in an HTML Template* on the next page
- *Disabling the Editing of Variables in Variants* on page 245

Next Step

In the next step, you define the *Help Sections and Process Specifications* on page 344 for the template.

6.2.4.1 Configuring Variants for Text and Image Boxes in an HTML Template

Prerequisites

- You have configured a dropdown as a variant selector. See *Dropdowns* on page 353.
- You have configured all the text and image variables that change in a variant.

1. Go to step 4 of Template Design.
2. Choose a variable that changes in the first variant. See *Box and Variable Navigation* on page 416.

   The settings for the variable are displayed for the default variant. You have set this default variant in the last three steps of the sections *Content of Text Boxes* on page 313 and/or *Content of Image Boxes* on page 325.

   The variant list is displayed below the variable selection.
3. Click the button next to the variant selection list.

   The *Configure variant* dialog box opens:
4. From the top list, select the dropdown that you want to use as the variant selector.
5. Choose:
   - If you selected a dropdown that is linked to a custom structure, select the entry that you want to link to the first variant in the *Choose variant* list.
   - If you selected a template dropdown without a link to a custom structure:
     1. In the *Create/edit variant* field, enter the name of the first variant.
     2. If you want to translate the name of the first variant:
        - Click .
        - Select the language in which you entered the name.
        - Choose *Next*.
        - Add the required translations.
        - Click *Save*.
6. Click *Create*.

The variant entry that you just created is displayed in the variant list. Each field in step 4 of Template Design is now grayed-out and provided with a checkbox.

7. Activate the checkboxes of the fields that change in this variant (for example, *Mandatory field* or *Editing options*).
8. Enter the settings that apply to these fields in this variant.
9. Select the next variable that differs from the default variant in this variant.
10. Repeat steps 7 to 9 for each variable that changes in this variant.
11. Repeat steps 3 to 10 for each variant that you require.
12. Test your settings. See *Test* on page 360.

You have configured the content variants for the template.

6.3 Help Sections and Process Specifications

You can support the document creator with a series of measures during editing and preset process steps:

- *Check Features* below: configure measures to assist the document creator in entering texts and using images.
- Help tools for text boxes and Help tool for images boxes: or each change to content in text and image boxes, you can provide sections for the document creator in the form of descriptions or test specifications. Note that you integrate these help sections into the previous step *Processing Rules* on page 311, because help sections can be reconfigured for each variant.
- *Advanced Layout* on the facing page: to make document editing more user-friendly when the document contains a large number of variables, use the advanced layout.
- *Customizing Process* on page 346: as the template designer, you can preset various items for the Customizing process, such as an approval workflow and mandatory steps before editing the document.
- *Production* on page 349 of the document: as the template designer, you specify whether the completed HTML document can be published in the Media Pool.

Next Step

In the last step, you finalize the template and request approval if necessary (see *Finalization and Release* on page 350).

6.3.1 Check Features

Brand Template Builder provides you with features for performing checks. You can use the check features to assist the document creator in using suitable images. You reach the fields in step 1 of Template Design.

Images

Field	Description
Version check	Choose whether and how images from the Media Pool that are used in the document will be checked for available image versions. • *Do not search for new versions*: While the document is being created, no check for new image versions takes place. • *Search for new versions but ask before replacing*: While the document is being created, a check for new image versions takes place. Replacement of image versions must be confirmed in a dialog window. • *Always use the latest version of an image*: When a document is being created, the latest image version is used automatically without confirmation.
Allow only valid images	If the *Yes* checkbox is activated, the system checks whether the images used are valid (the *Valid from/to* field for the asset in the Media Pool). The check is based on both the alternative images defined in step 2 of the template design and the images from the Media Pool that the document creator inserts in the document.

Next Step

In the next step, you configure an *Advanced Layout* below.

6.3.2 Advanced Layout

To make document editing more user-friendly when the document contains a large number of variables, use the advanced layout.

Prerequisite

No variants are mapped in the template.

What Can Be Changed in the Advanced Layout?

You can use the advanced layout to change the editing boxes of variables on the *Content* tab in the document editor. You have the following options:

- Define the height and width of the editing box
- Change the position of the editing boxes through drag-and-drop (for example, place editing boxes next to each other)

- Specify the displayed formula elements (for example, edit the help text displayed or the editing box title and translate them if necessary)

Associated Tasks

- *Creating an Advanced Layout* on page 293
- *Deleting an Advanced Layout* on page 295

Next Step

Continue with the *Customizing Process* below step.

6.3.3 Customizing Process

As the template designer, you have the option of presetting the following items for the Customizing process. You edit most of these items in the *Process* area in step 1 of Template Design.

Step 1: Mandatory Steps before Editing Content

If you select the *Variant* selection checkbox, the document creator must select the variant of the document before the document can be edited.

Step 1: Mandatory Steps before Finalizing

Choose which steps have to be performed before the user can finalize the document:

- Send as e-mail: before finalizing, the user must create an e-mail that is used to send the HTML document to the selected recipient after finalizing.

Step 1: Approval Workflow

Define the approval workflow that must be performed after the document is edited. You can manage and edit workflows under *> Administration > Data Structures & Workflows > Workflows*. For more information, see *Additional Documentation* on page 424 in the administration manual.

Step 1: Configuring the Document Editor

The document editor provides a variety of functions that you can activate in the configuration (see *Document Editor* on page 50). This provides the following benefits:

- You can simplify editing for the document creator, because only the functions that the document creator requires are accessible.
- You can deactivate document editor functions in a configuration. If you assign the configuration to a template, the document creator can no longer access these functions. This allows you to prevent certain kinds of editing.

In step 1 of Template Design, you can assign a configuration to the template. Choose a configuration in the *Editor preset* picklist.

Note

An administrator creates the various configurations of the Document Editor. If you have any questions, contact the administrator. Note that many different settings depend on the configuration of the document editor, for example, the automatic naming of the document according to different patterns, available editing functions (also depending on the tab), the display of help texts, and so on.

Step 1: Real-time Preview

Activate the checkbox if you want the *Real-time preview* function to be available while customizing the document.

Step 4: Supplement of an automatically assigned name

Note

The function described below is only available in Step 4 under the following conditions:

- You selected a text variable in step 4.
- In step 1, you have chosen a configuration of the Document Editor in which the automatic document naming follows one of the following patterns
  - <Template Name> - <Variable(s)>: The name is composed of the template name and the values of text boxes, which the designer marks accordingly in the template design step 4. Several variables are separated by a space.
  - <Variable(s)>: The name is composed of the values of text boxes, which the designer marks accordingly in the template design. Several variables are separated by a space.

Activate the *Use value as document name* checkbox if you want the contents of the text variable to become part of the name of the documents. Note that this is a default name that the document creator can change or add to.

EXAMPLE

You have a variable in which a discount value is entered, e.g. the field is preset with the value 10 [%]. The checkbox is activated for this variable.

If the document creator enters the value 20 [%] and then creates the document name, the value 20 is added to the document name.

Note that if the document creator first creates the document name and then edits the variable, the value 10 is added to the document name.

Next Step

In the next step, you define the options for outputting the created document (see *Production* on the facing page).

6.3.4 Production

Specify that documents can be published in the customizing wizard in *Step 3 - Publish in the Media Pool module*. To do so, change the *Documents can be published in module Media Pool* field in the *Output* area in step 1 of Template Design. If you activate *Yes*, the document creator can create a ZIP file based on finalized documents as new assets in the Media Pool.

In the Media Pool, these HTML files can be opened and adapted in Brand Template Builder using the function *Adapt to your own requirements*. The changed documents can also be published in the Media Pool.

Next Step

In the last step, you finalize the configuration of the template and request its approval if necessary. See *Finalization and Release* on the next page.

6.4 Finalization and Release

To finalize and, where necessary, request approval for the template, go to step 6 of Template Design. This step summarizes the settings made in the previous steps as well as other information about your template.

In addition to the template properties, a page preview and all custom objects are also shown. Check the configurations that you made. You can also *Test* on page 360 the template editing here again.

To complete the template design, click *Finish*.

Note

If you selected a VDB that requires approval in step 1, the template is sent to the assigned workflow. The template is displayed in the *My Templates in Work* list under *Waiting for Approval*.

You can search for and use finished and approved templates using the template search. Click > *Template Design* > *My Finalized Templates* to display a list of your edited and finished templates.

7 Main Functions

This chapter provides you with a description of the main functions that are used at various points in Template Design when creating both INDD and HTML template.

Dropdowns

Dropdowns fulfill two tasks in Brand Template Builder:

- You use dropdowns as selectors when you configure variants of a template.
- You use dropdowns as connectors for reaching the content of custom structures as the sources for text and image variables.

For more information, see *Dropdowns* on the facing page.

Tests

When you create a template, you must configure a wide variety of settings. To ensure that you achieve your desired result, you can test your settings from step 3 of Template Design onward. BrandMaker recommends testing your settings repeatedly to give you a clear oversight of how your settings affect the document creator.

For more information, see *Test* on page 360.

Selecting Boxes and Variables in Template Design

When you configure the change options for boxes, you must select the boxes and the variables specified in them individually. The section *Box and Variable Navigation* on page 416 explains how Template Design works when doing so.

7.1 Dropdowns

Dropdowns fulfill two tasks in Brand Template Builder:

- You use dropdowns as selectors when you configure variants of a template.
- You use dropdowns as connectors for reaching the content of custom structures as the sources for text and image variables.

Dropdown Types

In Brand Template Builder, there are two dropdown types:

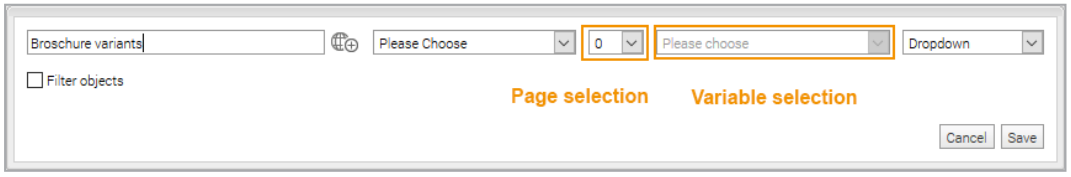
- *Template Dropdown*: a template dropdown is available only in the template in which it is created. You can also connect a template dropdown either to a custom structure or as a variant selector.
- *Smart Dropdown*: a Smart Dropdown is created in one template, but it can then be used in all templates. You must always link a Smart Dropdown to a custom structure. If you use a Smart Dropdown as a variant selector, the variants are linked to the objects in the custom structure.

Note

Note the following difference when the document creator uses dropdowns: if a Smart Dropdown is used in the document, the document creator can use only one value in the overall document. If a Smart Page that uses a template dropdown is used multiple times in a document, the document creator can select a separate setting for each instance of the Smart Page.

Where Does the Document Creator Access the Dropdowns?

The document creator accesses Smart Dropdowns in step 1 of the customizing wizard. You can make template dropdowns accessible at various points - depending on the effect of the configured setting. You configure the setting in step 1 of Template Design under *Dropdowns > Manage > Create new Dropdown* or *Edit*. You edit the page and variable selection when doing so:



- *Page Selection = 0:* The document creator edits the dropdown in step 1 in the customizing wizard. Use this setting if you want the setting to apply to the entire document.
- *Page Selection = 1, 2, and so on:* The document creator edits the dropdown on the *Content* tab in the document editor when the page in question is displayed in the preview. Use this setting if the dropdown setting applies only to the page in question.
- *Page Selection = 1, 2, and so on and a Variable is Selected:* The document creator edits the dropdown above the variable field in the document editor. Select this setting if the dropdown setting applies only to the variable.

Selection Mode

You can use the selection mode to set how the document creator can edit the dropdown:

- *Dropdown*: the dropdown is displayed as a selection list. This is the only available setting for variant selectors.
- *Image selection*: the available images are displayed in a thumbnail view.
- *Popup*: the default image is displayed. The other images can be reached via a popup. This setting is useful if there are a large number of selection options and the thumbnail view would be very large.

Filtering Extensive Custom Structures

Custom structures can be very extensive. Note the features that you can use to filter extensive custom structures (see *Custom Structures* on page 74).

You can create cascading custom structures. Cascading custom structures make it easier for the user (in the case of Brand Template Builder, the document creator) to make a selection.

EXAMPLE

A globally active company has affiliates worldwide with addresses that are managed centrally in a custom structure. Since there are a large number of affiliates, the selection of affiliates should be cascading, for example, so that the address field can be filled in Brand Template Builder. Two higher-level custom structures are therefore created. In the top structure, the EMEA, AMER, and APAC economic areas are listed. The first lower-level custom structure lists the countries in which the company has affiliates. Each entry is assigned to its applicable economic area (for example, USA is assigned to AMER and Germany to EMEA). All the affiliates and their address data are then maintained in the bottom structure. Each entry (that is, each affiliate) is assigned to the applicable country (for example, New York, Washington, and Los Angeles are assigned to USA and Berlin, Frankfurt, and Munich are assigned to Germany).

If you map this cascade in the dropdowns, you make it easier for the document creator to make a selection: the document creator first selects the economic area, then the country, and finally the relevant affiliate from a clearly arranged list.

You can also create cascading custom structures as both template dropdowns and Smart Dropdowns. For more information, see *Creating Cascading Dropdowns* on page 357.

Associated Tasks

- *Creating a Template Dropdown* below
- *Creating a Smart Dropdown* on the next page
- *Creating Cascading Dropdowns* on page 357
- *Making a Smart Dropdown Accessible in a Template* on page 358
- *Deleting a Dropdown* on page 359

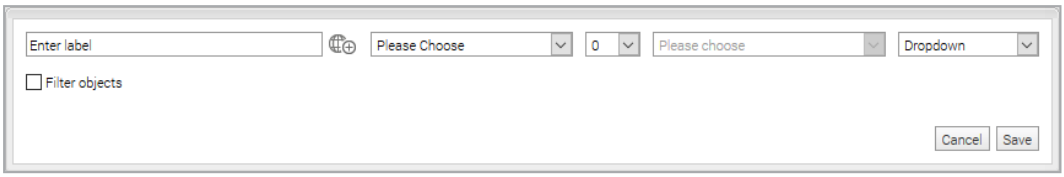
7.1.1 Creating a Template Dropdown

1. Go to step 1 of Template Design.
2. Choose *Manage* in the *Content/ Dropdowns, Variants, and Affiliate* area.

   The *Manage Dropdowns* dialog box opens.

3. Choose *Create new Dropdown*.

   The following dialog box is displayed:



4. Enter the name of the template dropdown in the field on the left. If you want to create the name in multiple languages, click . Select the language in which you entered the first name. Choose *Next*. Enter the required translations in the *Enter Language Versions* dialog box. Click *Save*.
5. If you want to connect the template dropdown to a custom structure, select the custom structure in the second field.
6. In the page selection and, if necessary, the variable selection, specify where the document creator can access the dropdown.
7. If you are connecting the template dropdown to a custom structure, select either *Image selection* or *Popup* in the picklist on the right.
8. If you are connecting the template dropdown to an extensive custom structure and the relevant filtering is configured in the *Labels* field in the user administration, activate the *Filter objects* checkbox. In the *Attribute* list, select the attribute with the value that must match the *Labels* user field. For more information, see *Filtering Extensive Dropdowns for the Document Creator* on page 75.
9. Click *Save*.

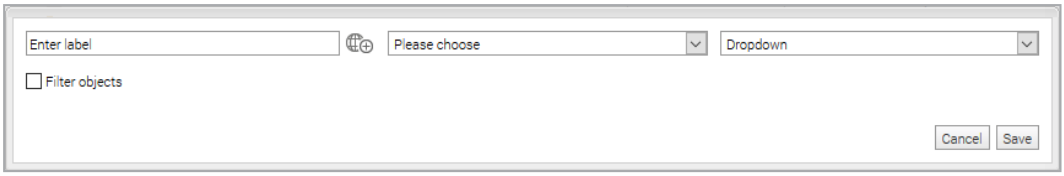
You have created the template dropdown.

7.1.2 Creating a Smart Dropdown

1. Go to step 1 of Template Design.
2. Choose *Manage* in the *Content/ Dropdowns, Variants, and Affiliate* area.

   The *Manage Dropdowns* dialog box opens.
3. Go to the *Smart Dropdowns* tab.
4. Click *Create new Smart Dropdown*.

   The following dialog box is displayed:



5. Enter the name of the Smart Dropdown in the field on the left. If you want to create the name in multiple languages, click . Select the language in which you entered the first name. Choose *Next*. Enter the required translations in the *Enter Language Versions* dialog box. Click *Save*.
6. Select the custom structure in the second field.
7. If you are connecting the Smart Dropdown to a custom structure, select either *Image selection* or *Popup* in the picklist on the right.
8. If you are connecting the template dropdown to an extensive custom structure and the relevant filtering is configured in the *Labels* field in the user administration, activate the *Filter objects* checkbox. In the *Attribute* list, select the attribute with the value that must match the *Labels* user field. For more information, see *Filtering Extensive Dropdowns for the Document Creator* on page 75.
9. Click *Save*.

You have created the Smart Dropdown.

> **Note**
>
> Note that although you have created the Smart Dropdown, it is not yet accessible in the template. For more information, see *Making a Smart Dropdown Accessible in a Template* on the next page.

7.1.3 Creating Cascading Dropdowns

1. Go to step 1 of Template Design.
2. Choose *Manage* in the *Content/ Dropdowns, Variants, and Affiliates* area.

   The *Manage Dropdowns* dialog box opens.
3. Choose which dropdown type you want to configure: stay on the *Template Dropdowns* tab or go to the *Smart Dropdowns* tab.
4. Choose *Create new Dropdown* or *Create new Smart Dropdown*.

   The dialog box for editing the dropdown properties opens.

5. In the second field, select the top cascading custom structure. Edit the remaining fields as described under *Creating a Template Dropdown* on page 355 or *Creating a Smart Dropdown* on page 356.
6. Click *Save*.

   The Smart Dropdown is displayed in the overview.
7. Click the Smart Dropdown that you just created.
8. Choose *Create new Dropdown* or *Create new Smart Dropdown*.
9. In the second field, select the next cascading custom structure. Edit the remaining fields as described under *Creating a Template Dropdown* on page 355 or *Creating a Smart Dropdown* on page 356.
10. Click *Save*.

    The dropdown is displayed in the overview below the first created dropdown.
11. Repeat steps 7 to 10 until all your required cascades are created as dropdowns.

You have created the cascading dropdowns.

7.1.4 Making a Smart Dropdown Accessible in a Template

1. Go to step 1 of Template Design.
2. Choose *Manage* in the *Content/ Dropdowns, Variants, and Affiliate* area.

   The *Manage Dropdowns* dialog box opens.
3. Choose *Insert Smart Dropdown*.

   The *Insert Smart Dropdown* dialog box opens. It lists all the Smart Dropdowns in your system.
4. Click the Smart Dropdown that you want to use in the template.
5. Choose *Apply*.

The Smart Dropdown is added on the *Template Dropdowns* tab. You can use the Smart Dropdown as a source or variant selector in the current template.

7.1.5 Deleting a Dropdown

Warning! Data loss!

When you delete dropdowns, the content of non-finalized documents with content provided by the deleted dropdown is lost.

- Before the deletion, check whether the dropdown is used in non-finalized documents.
- Copy INDD templates that use the dropdown. Change the copy and archive the original.

1. Go to step 1 of Template Design.
2. Choose *Manage* in the *Content/ Dropdowns, Variants, and Affiliates* area.

   The *Manage Dropdowns* dialog box opens.
3. Click the dropdown that you want to delete.
4. Click *Delete*.

   A prompt is displayed.
5. Click *Yes*.

The dropdown is deleted.

7.2 Test

When you create a template, you must configure a wide variety of settings that affect how the document can be changed. To ensure that you achieve your desired result, you can test your settings from step 3 of Template Design onward. BrandMaker recommends testing your settings repeatedly to give you a clear oversight of how your settings affect the document creator.

What Exactly Can Be Tested?

When you test the template, the template is opened with the current settings in the customizing wizard or document editor. The functions that you can access there depend on the rights that you have for customizing. If you have all the necessary rights, you can test all the settings made in Template Design. Contact your system administrator if you cannot access all the functions and cannot perform sufficient testing.

When you open the template for testing in the customizing wizard or document editor, you can edit the template in the same way as a document creator. However, you cannot finalize the document and if you create a PDF, all the output methods are available, including high-resolution output methods. The document creator can access high-resolution output methods only after the document is finalized.

Entered texts, changed images, and other editing are not permanently saved in the template. Instead, they are displayed only until the end of your test. When you finish the test, all the changes are discarded.

Special Issues for Testing Smart Groups

When testing a Smart Group, note that you cannot test the link with data objects. To test the link, first finalize the Smart Group and then add the Smart Group to a template.

Where Do I Access the Test Function?

You can access the test function when you open a template in step 3 of Template Design. You can also access the test function in steps 4, 5, and 6. Testing in steps 1 and 2 is not useful because no settings that have a direct effect on how the template can be changed are configured in these steps.

You can also test your templates that are in progress directly under *> Brand Template Builder > Designer > My Templates in Work*. Click and choose *Test*.

How Can I Continue Editing and Correct Errors after Testing?

When you complete your test, close the document editor if necessary. Then, click *Finalize* in the customizing wizard. The page on which you started the test is now displayed again. Correct the errors or continue editing the template. Test the template again with the changed settings.

Testing a Template

1. Choose:
    - If you are in Template Design:
        a. Go to step 3, 4, 5, or 6.
        b. Click *Test*.
    - If you are not yet in Template Design:
        a. Choose *> Brand Template Builder > Designer > My Templates in Work*.
        b. Click and choose *Test*.

    The customizing wizard opens.
2. Test the settings that you configured.
3. Go to the customizing wizard.
4. Click *Finalize*.

You return to the page on which you started the test. You have tested the template.

This page has been intentionally left blank to ensure new chapters start on right (odd number) pages.

8 Managing a Template

This section describes the following functions:

Searching for Templates

Brand Template Builder lets you search for existing templates at various points. See *Searching for a Template* on page 366.

Editing a Template

When you edit a template, you change the properties of the template. See *Editing Finalized Templates* on page 372.

Note that this is not possible for online templates.

Revising or Copying a Template

When you revise or copy a finalized template, you can change its processing rules, help tools, and process specifications. See *Revising or Copying a Template* on page 373.

Note that this is not possible for online templates.

Transferring a Template to a Different BrandMaker System

If you are working with a production and test system, you can easily transfer templates that you created already and their configurations from one system to another. See *Transferring a Template to a Different BrandMaker System* on page 374.

Note that this is not possible for online templates.

Templates in Other Modules

You can use templates in other modules. See *Using the Template in Other Modules* on page 376.

Note that this is not possible for online templates.

Archiving a Template

If you archive a template, the template can no longer be used by document creators for new documents. However, existing documents based on the template remain in existence. You can only archive finalized templates. Please note *Archiving a template* on page 378.

Reactivating a Template

If an archived template is needed again for document creation, reactivate the template. Please note *Reactivating a Template* on page 379.

Deleting a template

If you delete a template, the template can no longer be used by document creators, as in archiving. However, all documents based on the template are also deleted. For details see *Deleting a template* on page 380.

8.1 Searching for a Template

> **Note**
>
> Note that the amount of templates that you can access is determined by rights. For more information, see *Assigning Authorizations* on page 93.

Brand Template Builder provides a variety of options for searching for templates:

Characteristic	Path	Description
My Templates in Progress	*> Brand Template Builder > Templates > My templates in progress* in the drop-down next to the page title *> Brand Template Builder > Designer > My Templates in Progress* in the *In Progress* section	You can access all the templates that you have created and not yet finished editing.
My Templates in Approval	*> Brand Template Builder > Templates > In approval process* in the dropdown next to the page title *> Brand Template Builder > Designer > My Templates in Progress* in the *Wait for Approval* section	You can access all the templates that you have created and that have not been approved yet.

Characteristic	Path	Description
My Finalized Templates	*> Brand Template Builder > Templates > My finalized templates* in the dropdown next to the page title *> Brand Template Builder > Designer > My Finalized Templates*	You can access all the templates that you have created and finished editing.
The last five templates used	*> Brand Template Builder > Overview* in the *Last Used* section	You can access the last five templates that you used to create a document.
Templates marked as favorites	*> Brand Template Builder > Overview* in the *Favorites* section or under *Brand Template Builder > Manager > Favorites*	You can access finalized templates that you have marked as your favorites. In the *Favorites* section under *Overview*, you can access your last five marked templates. Under *> Manager > Favorites*, you can access all the templates you have marked as favorites.
The five most recent templates	> Brand Template Builder > Overview in the *New Templates* section	You can access the five most recent templates from all your accessible and finalized templates.
Archived templates	*> Brand Template Builder > Templates > Archived templates* in the dropdown next to the page title > Brand Template Builder > Manager > Templates > Archived	You can access all archived templates that are accessible to you.
In all accessible templates	Searching under *> Brand Template Builder > Overview* or *> Brand Template Builder > Templates*	You can search for all your accessible and finalized templates. Refer to the section below.

Depending on your permissions, you can access additional filters under *> Brand Template Builder > Templates* in the dropdown next to the *Templates* title.

Searching in All Your Accessible Templates

To search in all your accessible templates, choose *> Brand Template Builder > Overview* or *> Brand Template Builder > Templates*. Use the search fields in the upper area to start the search. Note that the search criteria displayed are configurable and may therefore change. Contact your system administrator if you have any questions.

Quick Search for Valid Templates

Note

To use the quick search, you must be able to access *> Brand Template Builder > Manager*. Access is protected by a right.

Note that the amount of templates that you can access is also determined by rights. For more information, see *Assigning Authorizations* on page 93.

You can also use a quick search to search for a valid template. You access the quick search under *> Brand Template Builder > Manager > Overview*. Enter a search term in the search field. Click *Search* to start a global search.

Search	Example	Search results
For parts of words	*tree*	Apple *tree*, Pear *tree*, *Tree*house
For several terms	*important document* or *important, document*	The *document* is *important* An *importantdocument*
For an exact phrase	*"an important"*	*An important* document
For alternative words	*one OR two OR three*	That is *one* of the important documents That is *one* of the *three* most important documents That is *one* of *two* important documents
Excluding words	*one -two three*	That is *one* of the *three* most important documents

Advanced Search for Templates

Note

To use the advanced search, you must be able to access > *Brand Template Builder* > *Manager*. Access is protected by a right.

The advanced search lets you search for specific fields or properties, such as tags or titles. You can also search for invalid templates and templates that are in progress or approval.
You access the advanced search under > *Brand Template Builder* > *Manager* > *Search*. Choose *Search* to start the search. Choose *Reset* to clear the search fields and delete all your entries.

You can enter search criteria in the following fields:

Field	Description
Full text search	You use this field to search the following fields or properties for the entered search term at the same time: • Template ID • Template name • Tags • Category • ID of the asset in the Media Pool
Tags	You use this field to search for templates with properties where the search term is defined as a tag.
Name	You search for the name of a template.
Template ID	You can search for the unique identification number (ID) of a template or meta-template. When you search for a template, you can enter the ID in the field with or without the prefix "T-". When you search for a meta-template, you must enter the complete ID (for example, "MT-999").
Virtual data-base	This searches for a template in the selected virtual database.
Item number	You enter the asset item number in the Media Pool. The search lists the templates that are based on the asset.

Field	Description
Format	This searches for templates for which a specific value (e.g. *DIN A4* or *DIN A2*) is entered in the *Format* field.
Color	This searches for templates for which a specific value (e.g. *one color*, *CMYK*, or *RGB*) is entered in the *Color* field.
Dimensions	You can search for templates by specifying the width x height. This search option also finds templates that can be scaled to the specified dimensions.
Units	Specify the units in which you have entered the dimensions: • Millimeter (mm) • Centimeter (cm) • Inch (in)
Output method	Note: accessible only when the detailed search is displayed. This searches for templates that are created for a specific output method.
Valid from	This searches for templates with a validity period that begins after the specified date.
Valid to	This searches for templates with a validity period that ends before the specified date.
Also search sub-categor-ies	Activate this checkbox to include nested category trees in the search in their entirety.
Show invalid documents	Activate the checkbox to also find templates that are not valid at the time of the search. If you do not activate this checkbox, you can only find valid templates using the other fields.
Show archived templates	Activate the checkbox to also find templates that are archived at the time of the search. If you do not activate this checkbox, you can only find non-archived templates.
Templates in work or approval	Activate this checkbox to include templates that are still being edited or that are currently going through the approval process in the search.
Also Smart Groups	Activate the checkbox to also find Smart Groups. If the checkbox is cleared, no smart group is displayed in the search results.

Field	Description
Also Smart Pages	Activate the checkbox to also find Smart Pages. If the checkbox is cleared, no Smart Pages are displayed in the search results.

Other Search Options

Brand Template Builder provides other options for searching for templates:

Searching In Categories

Click *> Brand Template Builder > Manager > Categories* to search for templates to which a specific category is assigned. The category tree is displayed. Click the required category. Brand Template Builder displays all the templates to which the category is assigned.

Outdated Templates

If a template is no longer valid, you can access the template under *> Brand Template Builder > Manager > Old*. Note that you cannot find templates with a validity period that has not begun yet here.

8.2 Editing Finalized Templates

When you edit a finalized template, you change the properties of the template. You can find a list of the properties that can be changed in *Properties of the INDD Template* on page 162 and *Properties of the HTML Template* on page 308. Note that this is not possible for online templates.

1. Search for a template under *> Brand Template Builder > Overview* or *> Brand Template Builder > Templates*.
2. Choose ⋮ > *Edit*.

A dialog box for editing the properties opens.

8.3 Revising or Copying a Template

When you revise or copy a finalized INDD or HTML template, you can change its processing rules, help tools, and process specifications.

Note

Revising a template may have undesired effects on documents that are based on the revised template and that have not yet been finalized.

1. You can search for a template under *> Brand Template Builder > Overview or > Brand Template Builder > Templates*.
2. Choose ⋮ > *Copy template* or *Edit template*.

The template is opened in step 1 of Template Design. If you chose *Revise Template*, the template still has the same ID. If you copied the template, the settings are copied and created under a new ID.

8.4 Transferring a Template to a Different BrandMaker System

If you are working with a production and test system, you can easily transfer INDD and HTML templates that you created already and their configurations from one system to another.

Note

To completely transfer templates between systems, all the properties used that are managed centrally or in other modules must be synchronized. For example, this applies to categories, VDBs, custom structures, used data object types, and their attributes.

Tasks in the System Used Previously

1. When working with INDD templates: download the file with the linked images from the Media Pool (*Save with linked images* function, see *Media Pool User Guide* under *Additional Documentation* on page 424). Save the file locally.
2. Go to Brand Template Builder.
3. Search for the template to be transferred and open its detailed view.
4. When working with HTML templates: click *Download*.

   Download the ZIP file containing all the HTML files for the template.
5. Click *Export*.

   The template configuration is exported in the *XML* format.
6. Save the file locally.

You have saved all the files required for the transfer.

Tasks in the System to Be Used in the Future

1. When working with INDD templates: create the INDD file with the linked images as an asset in the Media Pool (see *Media Pool User Guide* under *Additional Documentation* on page 424).
2. Choose *> Brand Template Builder > Designer* and create a new template, either with *New INDD Template* or *New HTML Template*.

3. In step 1 of Template Design, select the file: for an INDD template, this is the asset in the Media Pool; for an HTML template, it is the ZIP file that you downloaded in the system used previously.
4. In the *Import template configuration* area, click *Browse*.
5. Select the XML file that you exported from the first system and choose *Open*.

   The configuration is applied to the template.

   Note: to ensure that the import is complete and correct, all the properties must be identical in both systems (for example, VDBs or categories). Custom structures must also be identical. If not, Brand Template Builder displays warnings notifying you of the issues in question.
6. Check and test the template if necessary. See *Test* on page 360.
7. Finalize the template.

The template can be used in the same way as in the first system.

Note

Please note that any existing configuration is completely deleted and replaced when you import the template configuration. It is not possible to import template configurations for templates upon which documents are already based or that have already been used. However, you can copy the template and import the XML file for the newly created template.

XML export of templates in 6.9 systems

Please note that the XML export of templates is changed decisively in version 6.9. Thereby the fields DATE_FROM and DATE_TO in the export are changed from the format number (in milliseconds) to string.

As a result, templates exported with a previous version cannot be imported unchanged after the update. You have two ways to work around this:

- The templates must be imported before the update and re-exported after the update.
- Users with appropriate XML knowledge adjust the XML file manually.

8.5 Using the Template in Other Modules

You can use INDD and HTML templates in other modules.

Marketing Shop

You can create templates as items in the Marketing Shop. Purchasers that select the item can create a document from it in Brand Template Builder in the same way as a document creator. The difference is that the customizing is incorporated into the purchasing process and may result in costs, depending on the item configuration.

Prerequisites

The following prerequisites apply when creating a template as an item in the Marketing Shop:

- If the template is used as a *Brand Template Builder(step 3 only)* item type, create an editor preset for the customizing with the option *Start with document individualization* activated. For more information about editor presets, see *Document Editor* on page 50. For information about assigning an editor configuration to a template, see the *Customizing Process* on page 296 for INDD templates. For the corresponding description for HTML templates, see *Customizing Process* on page 346.
- The field *Options for advertising material production* must not be set to *Select printing office, warehouse and further recipients*. For INDD files, you edit the field in step 1 of Template Design (see *Production* on page 299).
- An approval workflow for finishing the document must not be selected.

For more information, see *Additional Documentation* on page 424.

Job Manager and Marketing Data Hub

Templates can be a part of job processing in the *Job Manager* module. For this purpose, the job type (i.e. the job template) must include a variable in which the template ID from Brand Template Builder is specified. The job template is then linked to a fixed Brand Template Builder template.
The administrator now links the form fields from the template with the text variables from the Brand Template Builder template. When the form fields for the job are edited, the variables are automatically filled in the document.

The same principle applies when creating data in the *Marketing Data Hub* module. *Marketing Data Hub* is used to manage marketing-related data. This can also include the creation of documents with Brand Template Builder templates, if the corresponding data object type is created.

For more information, see the documentation for the *Job Manager* and *Marketing Data Hub* modules (see *Additional Documentation* on page 424).

8.6 Archiving a template

If you archive a template, the template can no longer be used by document creators for new documents. However, existing documents based on the template remain in existence. You can only archive finalized templates.

1. Click *> Brand Template Builder > Templates*.
2. Locate the template you want to archive.
3. Click *> ⋮ > Archive template* at the template.

The template is archived.

For INDD and HTML templates

1. Click *> Brand Template Builder > Manager*.
2. Search for the template you want to archive. Use the search function under *> Brand Template Builder > Manager > Search* oder *> Brand Template Builder > Manager > Categories*.
3. Click on the template *>* *> Archive Template*.

You have archived the template.

8.7 Reactivating a Template

If an archived template is needed again for document creation, reactivate the template.

1. Click > *Brand Template Builder* > *Templates*.
2. Locate the archived template, for example, by using the *Archived Templates* filter.
3. Click ⋮ > *Reactivate template* at the template.

The template is reactivated.

For INDD and HTML templates

1. Click > *Brand Template Builder* > *Manager* > *Templates* > *Archived*.
2. Click on the template you want to reactivate > > *Reactivate Template*.

You have reactivated the template. The template has the status *Finalized* and can be used accordingly for document creation.

8.8 Deleting a template

If you delete a template, the template can no longer be used by document creators, as in archiving. However, all documents based on the template are also deleted.

> Attention
>
> Data loss! The deletion of a template cannot be undone.

Delete a template

1. Find the template you want to delete.
2. Click on the template:
   - Under *> Brand Template Builder > Overview* and *> Brand Template Builder > Templates*: ⋮ > *Delete*.
   - For INDD and HTML templates: Under *> Brand Template Builder > Manager* and *> Brand Template Builder > Designer*:

   A confirmation prompt is displayed.
3. Confirm *Bestätigen* or *Delete*.

The template is deleted.

Delete multiple templates

1. Find the templates you want to delete in *> Brand Template Builder > Templates*.
2. Select the templates you want to delete:
   - If you want to delete all the templates in the search result, click *Select All* above the search result.
   - If you want to delete a part of the displayed templates, select the check-boxes of the templates you want to delete.
3. Click above the search result *> Menu > Delete*.

   A confirmation prompt is displayed.
4. Click *Delete*.

You have deleted the templates.

9 Interface

This section provides you with a description of the user interfaces that you require for administration and template design in the Brand Template Builder module.

- *Administration* on the facing page user interface
- *Template Design* on page 391 user interface

9.1 Administration

You access the administration pages for the *Brand Template Builder* module under *> Administration > Brand Template Builder*.

- *Editor Presets* on page 388
- *Output Methods* below
- *Printing Service* on page 389
- *Content Services* on the next page

Other functions used, such as custom structures, are cross-module. For a description of the user interface, see the administration manual in *Additional Documentation* on page 424.

9.1.1 Output Methods

The output method specifies which format and which properties are used to output a document. For example, a high or low-resolution PDF or an EPS can be generated from a document. You access the administration pages for output methods under *> Administration > Brand Template Builder >Output Methods*.

Table Setup

Name	Description
Rank	The output method order. The order is particularly relevant when downloading documents in the *Marketing Shop* module. In this situation, the top high-res output method enabled in the template is used. You use the drag point in the first column to change the order with drag and drop.
	Use the switch to activate or deactivate the output method. Only activated output methods can be selected in Brand Template Builder.
Name	Display name of the output method. If you require a multilingual name, enter the text in the following format: ~{EN} English name ~{DE} German name Note that the entry is available only in the default languages enabled in your system. The default languages that can be enabled are: DE, EN, FR, IT, ES, PT, NL, NO, RU, ZH, JA, and KO.
Type	The display of the format for the output file.

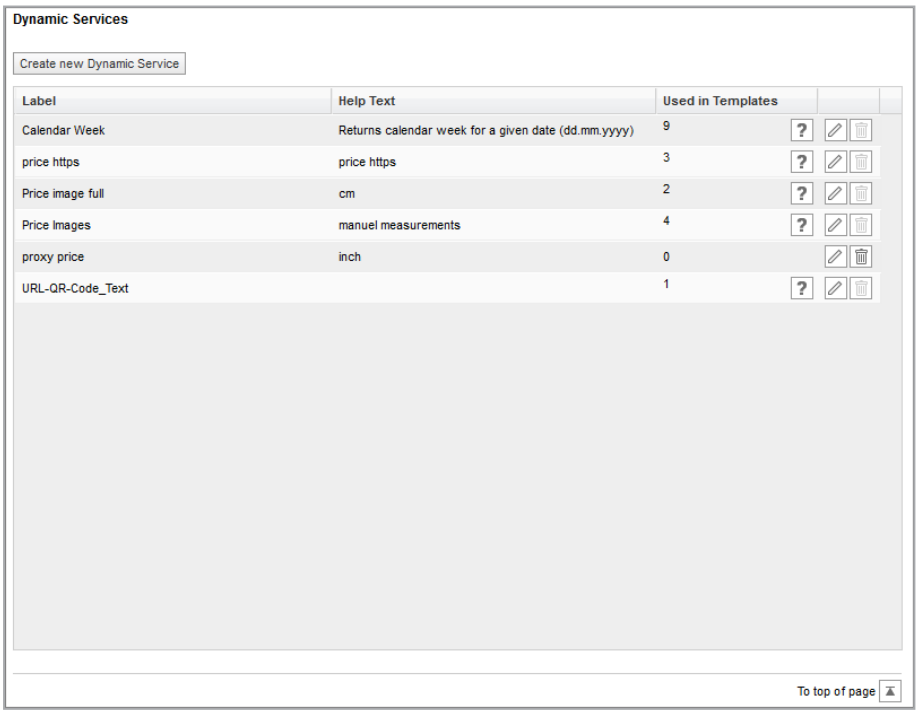
Name	Description
Help text	Description of the output format. If you require a multilingual help text, enter the text in the following format: ~{EN} This is a help text. ~{DE} Dies ist ein Hilfetext. Note that the entry is available only in the default languages enabled in your system. The default languages that can be enabled are: DE, EN, FR, IT, ES, PT, NL, NO, RU, ZH, JA, and KO.
Technical Name	Technical name of the display method. The name must be unique. The technical name is required to uniquely address output methods via API.

Associated Topics and Tasks

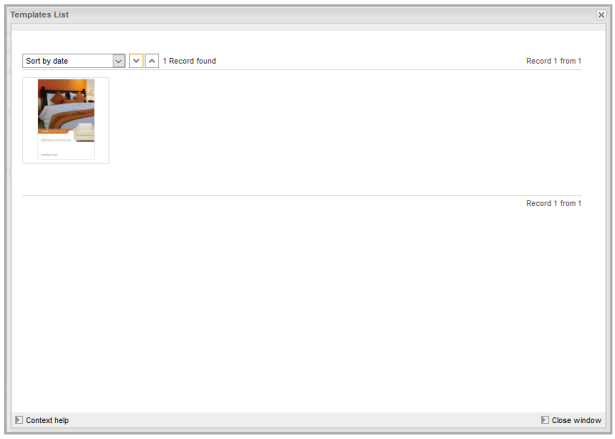
- *Output of INDD Documents* on page 83
- *Job Options as Output Methods* on page 86

9.1.2 Content Services

You access the content services configuration under *> Administration > Brand Template Builder > Content Services*. The page displays all the configured content services in the system:

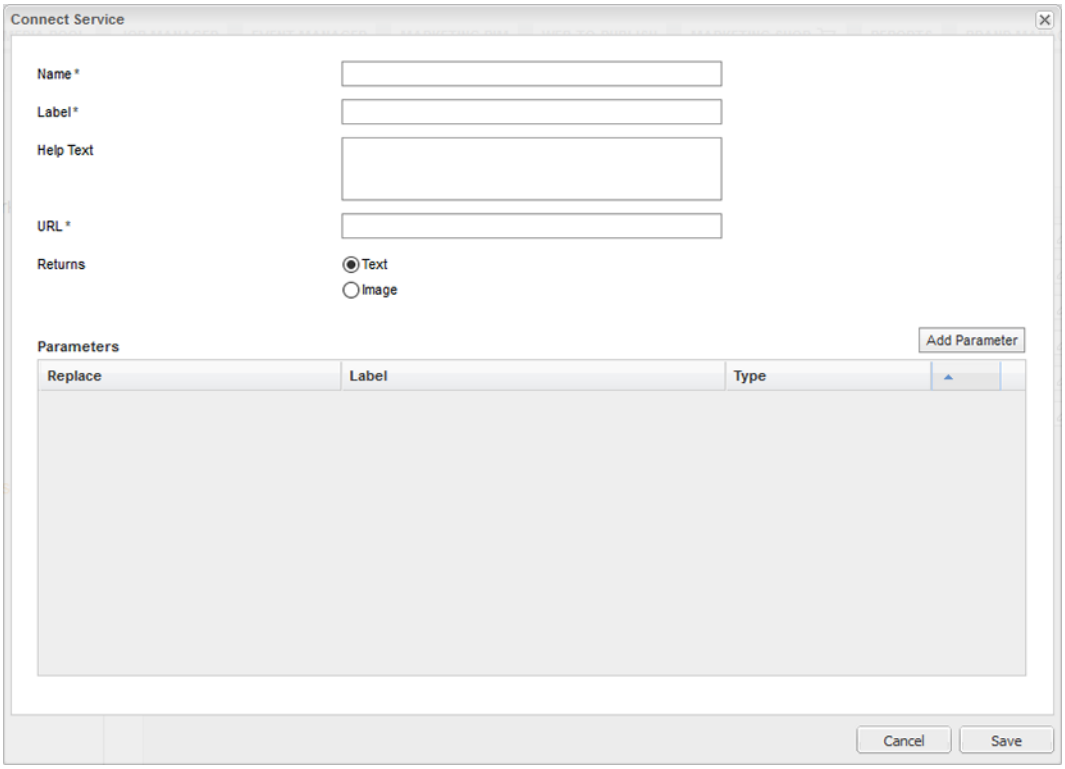


Setup

Element	Description
Create new dynamic service	This opens a dialog window in which you configure the link to a content service.
Label	Name of the content service
Help text	Description text
Used in templates	This column shows you the number of templates in which the content service is used. If you click ?, the templates are displayed for you:  When you click a template, the detailed view of the template is displayed.
Actions	You can reach the following actions in the last column: • : edit the content service. Note that you can edit only non-critical settings such as the label or help text for a content service that is already being used in templates. • : delete the content service. Note that you cannot delete a content service if the service is used in a template.

Dialog Box for *Configuring a Connection to a Content Service*

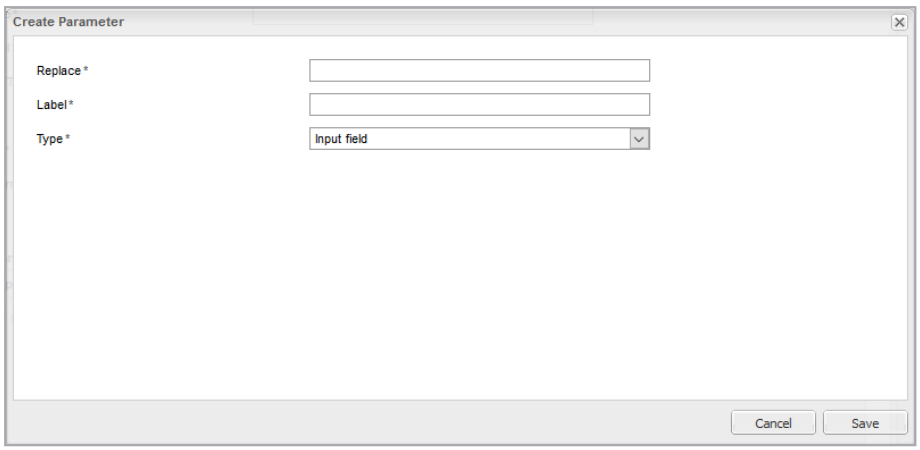
If you want to configure the connection to a content service, choose Connect Service. The following dialog box then opens:



Element	Description
Name	Enter the name of the content service.
Label	Enter the name used to display the content service.
Help text	Define information about the content service (its use, for example).
URL	Define the URL, including the replacement characters in use.
Returns	Specify whether the content service issues a text or an image.
Add Parameter	Choose the parameters that are transferred to the content service.

Add Parameter Dialog Box

You open the *Add Parameter* dialog box by clicking *Add Parameter* in the *Connect Services* dialog box. The following dialog box opens:



Element	Description
Replace	Define the URL replacement characters that are to be replaced by values from the Brand Template Builder document before the call.
Label	Enter the name used to display the replacement character.
Type	Use the picklist to specify which type of information is linked to the replacement characters and forwarded to the external service: • *Input field*: with this parameter type, an input field is displayed for the parameter on the Content tab in the document editor. The user enters the value when creating the document. The entered value is transferred to the content service. • *Smart Dropdown*: with this parameter type, the module administrator assigns a smart dropdown to the parameter while configuring the content service. The user selects the value when creating the document. • *Box height*: set the parameter type to transfer the height for a graphic to be generated. You can select the unit. Please refer to the description of the *Unit* element below in all cases. • *Box width*: set the parameter type to transfer the width for a graphic to be generated. You can select the unit. Please refer to the description of the *Unit* element below in all cases. • *Validity From/To*: set this parameter type to transfer the validity date from the document properties. If a document has unlimited validity, a parameter of this type remains empty. • *Affiliate ID*: set this parameter type to transfer the affiliate ID from the document properties.

Element	Description
Select Smart Dropdown	Note: visible if *Type* = *Smart Dropdown* is set. Click the button to select a Smart Dropdown.
Unit	Note: visible if *Type* = *Box height* or *Box width* is set. Choose the unit in which the parameter value is entered and calculated. Note that entered values are rounded to whole numbers. BrandMaker therefore recommends leaving the default setting as Millimeter (mm).

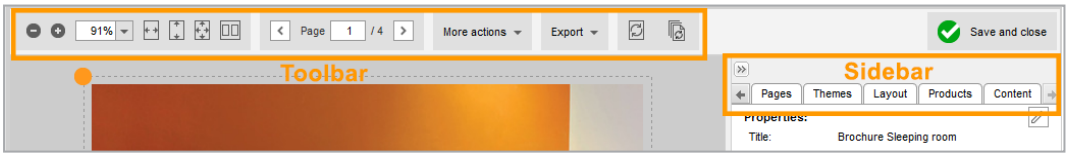
Additional Information

For more information, see *Content Service* on page 62.

9.1.3 Editor Presets

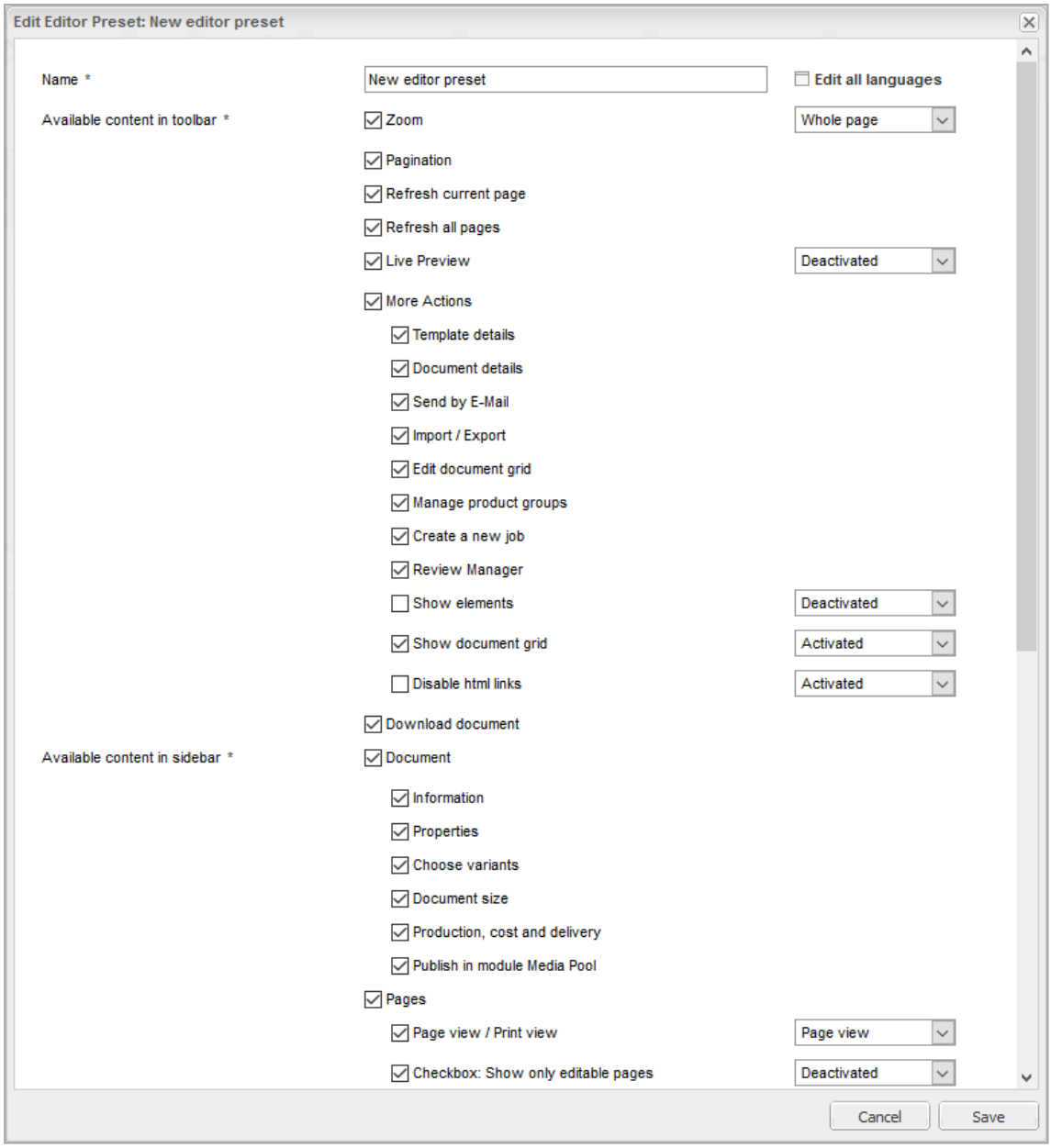
In the document editor, the user edits the content of the document. You can deactivate functions that or not needed or define their display. The template designer can assign a specific editor preset to each template. For example, you can define:

- That the document will open directly in the document wizard and not on the overview page of the customizing wizard
- The checkboxes, buttons, or menus to show or hide



To create editor presets or edit existing ones, click > *Administration* > *Brand Template Builder* > *Editor Presets*. An overview of all the editor presets created in the BrandMaker system is displayed. The list displays the existing editor presets. You can use the *Add*, *Edit*, and *Delete* buttons to manage the editor presets.

If you add or edit an editor preset, the dialog box in the screen shot below opens. Enter a name for the editor preset. Edit the subsequent fields to specify which functions you want to make available with this setting in the document editor. For a detailed description of the fields, see *Document Editor* on page 50.

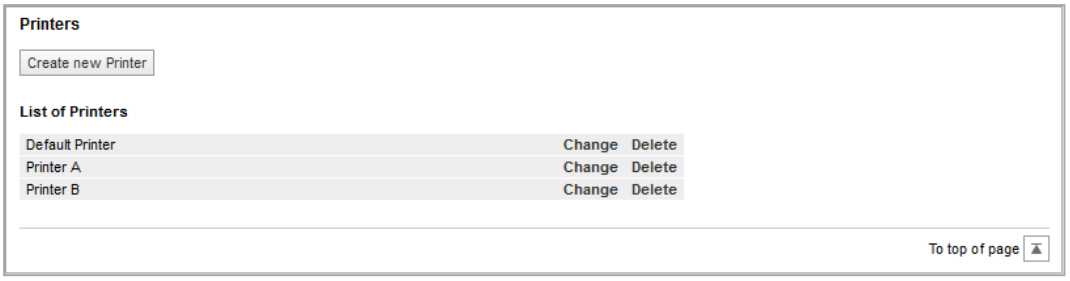


Associated Tasks

- *Adding an Editor Preset* on page 56
- *Editing an Editor Preset* on page 56
- *Deleting an Editor Preset* on page 57

9.1.4 Printing Service

Click > *Administration* > *Brand Template Builder* > *Printing Services* to manage the printing services that users can select for the production of their documents:



The page displays a list of the available printing services. You can choose *Change* or *Delete* to manage the existing printing services. If you choose *Create new printing service*, the page where you can provide the information for a new printing service is displayed.

For more information, see *Managing Printing Services* on page 89.

Properties

Name	Description
Name	Enter the printing service name.
E-mail address	Store a contact e-mail address to which the orders are sent.
Save files on another server for external access	Activate this checkbox to enable the storage of print data on an external server. This is required if the printing service does not have access to the Marketing Efficiency Cloud.
Visible for all organizational units	Specify that all organizational units can select the printing service for the production of documents.
Only visible for selected organizational units	Specify that only the selected organizational units can select the printing service for the production of documents. In the structure displayed, you then select the organizational units whose users you want to print documents through the printing service.
Supported document types	Define the type of print product for which the printing service can be selected.

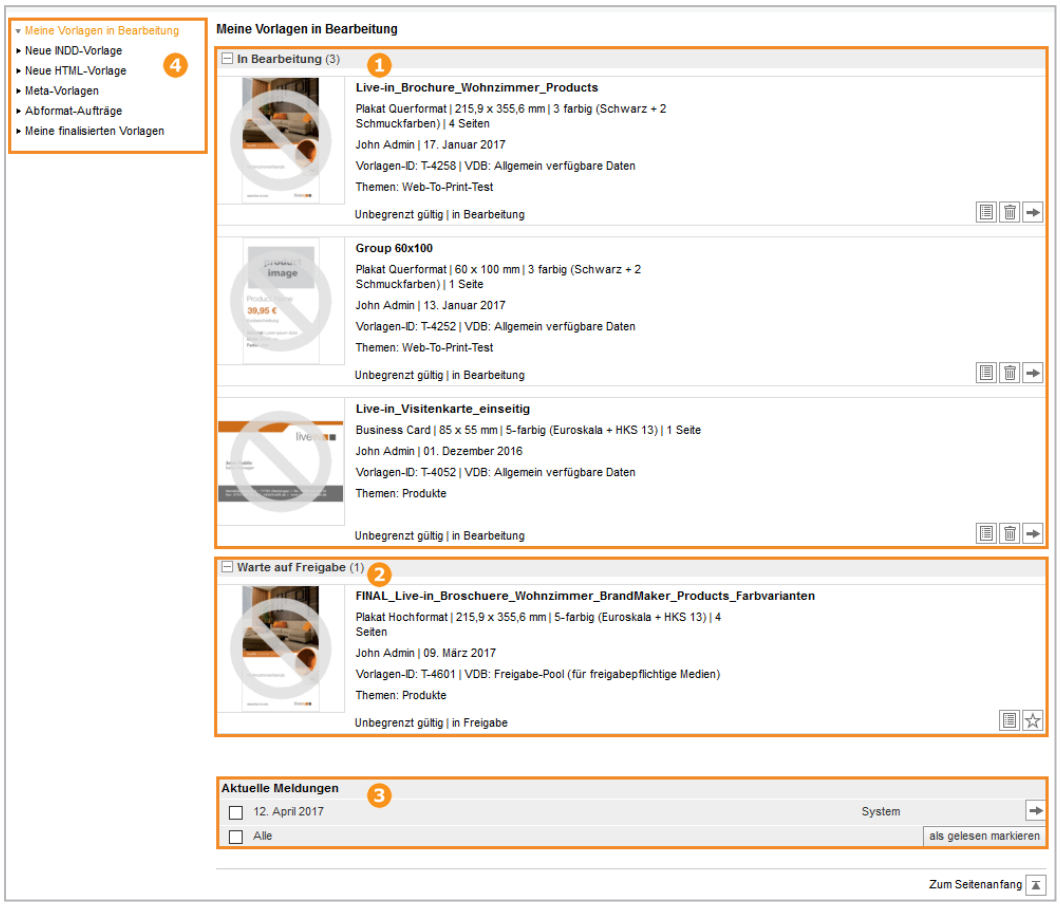
Associated Tasks

- *Creating a Printing Service* on page 90
- *Editing a Printing Service* on page 91
- *Deleting a Printing Service* on page 91

9.2 Template Design

To create a template, choose > *Brand Template Builder* > *Designer*.

Setup



This opens the *My Templates in Work* hit list. It lists all of the templates that:

- You are currently editing (1)
- Are waiting for approval (2)

Your messages are displayed in an overview below them (3). You can access additional functions on the left hand side (4):

- New INDD Template: create a new INDD template. For additional information, see *Designing an INDD Template* on the next page.
- New HTML Template: create a new HTML template. For more information, see *Designing an HTML Template* on page 407.
- Finalized Templates: see an overview of your finalized documents.

9.2.1 Designing an INDD Template

The design of an INDD template is broken down into six steps:

- Step 1: in *Step 1* on the facing page, you select the Media Pool asset that you want to use for the INDD template. You then configure the settings for the properties, quality assurance, and template type.
- Step 2: in *Step 2* on page 397, you define the alternative images and texts that are available to the document creator.
- Step 3: in *Step 3* on page 398, you define which text and image boxes can be changed and how. A variable is created for each changeable element. You also define the available transformations and any text flows over multiple pages, and create an advanced layout if necessary.
- Step 4: in *Step 4* on page 401, you choose the sources from which the variables specified in step 3 are filled and create help tools for the document creator. You also create variants in this step.
- Step 5: in *Step 5* on page 404, you choose which document structure can be created with the template.
- Step 6: *Step 6* on page 406 lists the configured settings for verification. When you complete this step, the template is either finalized or you request for the template to be included in a VDB that requires approval. If the request is approved, the finalized template is also made available for document creation.

Navigation

You have two options for switching between the steps in Template Design:

The Displayed Step Numbers

Click the relevant step number in the header area:

The step that is currently selected is highlighted in orange. Steps displayed in dark gray can usually be opened; refer to the note below. Steps displayed in light gray cannot yet be opened by clicking them.

Next and Back

You can click *Next* and *Back* in the footer area. You then reach the next processing step in the selected direction. See the note below for possible restrictions.

Note

Refer to the notes below for navigation between the steps in Template Design:

- You can go from step 1 to step 2 only if you have selected a file as a template and filled the mandatory fields in the *Meta Data* area at minimum.
- If you want to switch from step 2 to step 3 or from step 3 to step 4 for the first time, click the *Next* button at the bottom of the page.
- Step 5 can be opened only if the template is a basic template that can be enhanced with Smart Pages (see *Enhancement with a Smart Page* on page 178).

Additional Functions

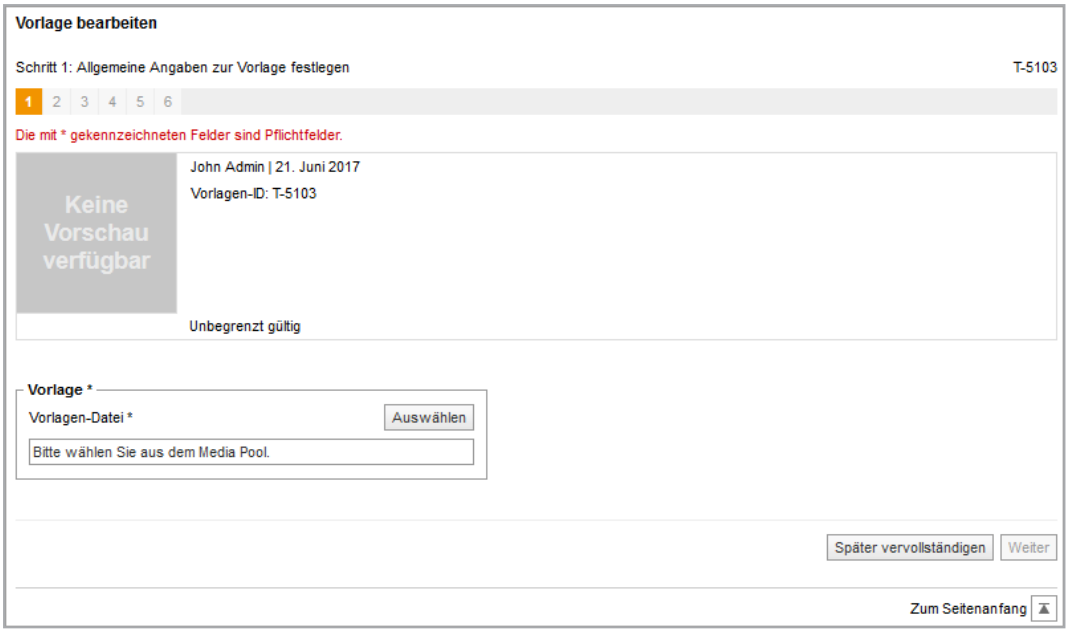
At the bottom of the page, you can also access the *Complete Later* and *Test* functions in addition to the *Back* and *Next* navigation elements:

- Complete Later: this closes Template Design. The template is saved with its current settings. You can continue editing the template by choosing *> Brand Template Builder > Designer > My Templates in Work >* *and then choosing > Edit on the template*.
- Test (available from step 3 onward): the template is opened with its current settings in the customizing wizard and you can test the settings. For more information, see *Test* on page 360.

9.2.1.1 Step 1

In step 1, you select the Media Pool asset that you want to use for the INDD template. You then configure the settings for the properties, quality assurance, and template type.

When you click *> Brand Template Builder > Designer > New INDD Template*, step 1 of Template Design is displayed:



Firstly, click *Select* to select an INDD file from the Media Pool (see *Selecting the INDD File* on page 159). After you select the file, additional fields are displayed. These fields are divided into the following page sections:

Template

After you select an INDD file, you can configure the template automatically (see *Automatic Configuration* on page 161), or apply a configuration from a different template (for example, from a test system) (see *Transferring a Template to a Different BrandMaker System* on page 374).

Meta Data, Validity Periods and Custom Properties

This area displays the template properties that you as the designer can change. They include, for example, the name of the template, its validity, and information that you can store for the user. You can find a full list of the properties under *Properties of the INDD Template* on page 162.

Output

As the designer, you have the option of presetting various items for outputting and producing the documents based on the template. In the *Output* area, for example, you define the methods that can be used to output the documents, whether the documents can be printed directly, and whether the documents can be published in the Media Pool. For more information, see *Production* on page 299.

Process

As the designer, you have the option of presetting various items for the document creation process. They include, for example, the specification of an approval workflow if the document is only to be used after receiving positive approval, and the specification of mandatory steps before the document is processed. For more information, see *Customizing Process* on page 296.

Content

The Content area is divided into the following sub-sections:

Dropdowns, variants and affiliates

In this area you decide whether the assignment of an affiliate to the document can be edited by the document creator. Also, you manage dropdowns. Dropdowns fulfill two tasks in Brand Template Builder:

- You use dropdowns as selectors when you configure variants of a template.
- You use dropdowns as connectors for accessing the content of custom structures as the sources for text and image variables.

For more information, see *Dropdowns* on page 353.

Size

This area shows the size of the first template page. If the template is a single-page basic template, you can configure the template as scalable in this area. For more information, see *Scalable* on page 178.

Pages

In the *Pages* area, you can control two aspects of the template design:

- You can configure how the document structure can be changed. This includes additional settings in step 5 of Template Design. For a detailed description,

see *Document Structure* on page 273.

- You can specify the template type. For a detailed description, see *Template Type* on page 167.

Images and Text

In these areas, you can define the check measures for images and text in the document. They include, for example, specifying a minimum resolution and a color space for images and specifying hyphenation for texts. For more information, see *Check Features* on page 290.

Smart Groups

In the *Smart Groups* area, you can control two aspects:

- You can mark the template as a Smart Group. For more information, see *Defining the Smart Group Template Type* on page 194.
- You can specify how the template can be enhanced with Smart Groups, regardless of the template type. For more information, see *Enhancement with a Smart Group* on page 174.

Marketing Data Hub

You edit this area if you are creating a Smart Group that is linked to the *Marketing Data Hub* module. The link lets you use the Smart Group to load data to a basic template. For more information, see *Connectible with Data Objects* on page 194.

Documents locales

In this section you configure the multilingualism of the templates and the documents based on them. For more information, see chapter *Multilingualism* on page 195.

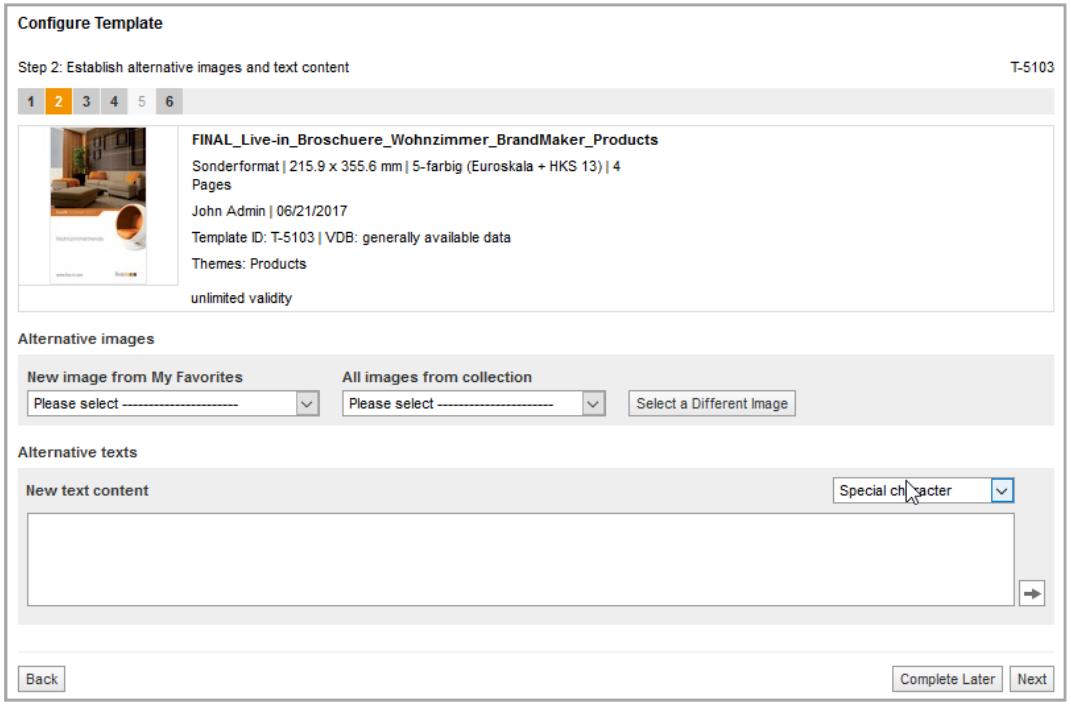
Associated Tasks

- *Selecting the INDD File* on page 159
- *Transferring a Template to a Different BrandMaker System* on page 374
- *Defining the Basic Template Type* on page 173
- *Defining a Smart Page Template Type* on page 194
- *Defining the Smart Group Template Type* on page 194

- *Enhancement with a Smart Group* on page 174 (for basic templates and Smart Pages)
- *Enhancement with a Smart Page* on page 178 (for basic templates)
- *Scalable* on page 178 (for basic templates)
- *For Mass Customization* on page 187 (for basic templates)
- *Creating a Template Dropdown* on page 355
- *Creating a Smart Dropdown* on page 356
- *Creating Cascading Dropdowns* on page 357
- *Making a Smart Dropdown Accessible in a Template* on page 358
- *Deleting a Dropdown* on page 359

9.2.1.2 Step 2

In step 2, you define the alternative images and texts that are available to the document creator.



Images

Alternative images that you want to make available to the document creator must be created as assets in the Media Pool. As the template designer, you have the following options for defining assets as alternative images:

- The asset is marked as one of your favorites in the Media Pool. In this case, you select a favorite as an alternative.
- The asset is part of a Media Pool collection that you can access. You then select all the images in the collection as alternatives.
- You also have the option of creating images that are not marked as favorites and not part of a collection as alternatives.

For more information about creating alternative images, see *Sources for Image Variables* on page 228.

Texts

You can enter alternative texts and use them to specify alternative formulations or even translations for the document creator. Whether or not the document creator can change the texts is dependent on other settings. For more information, see *Sources for Text Variables* on page 208.

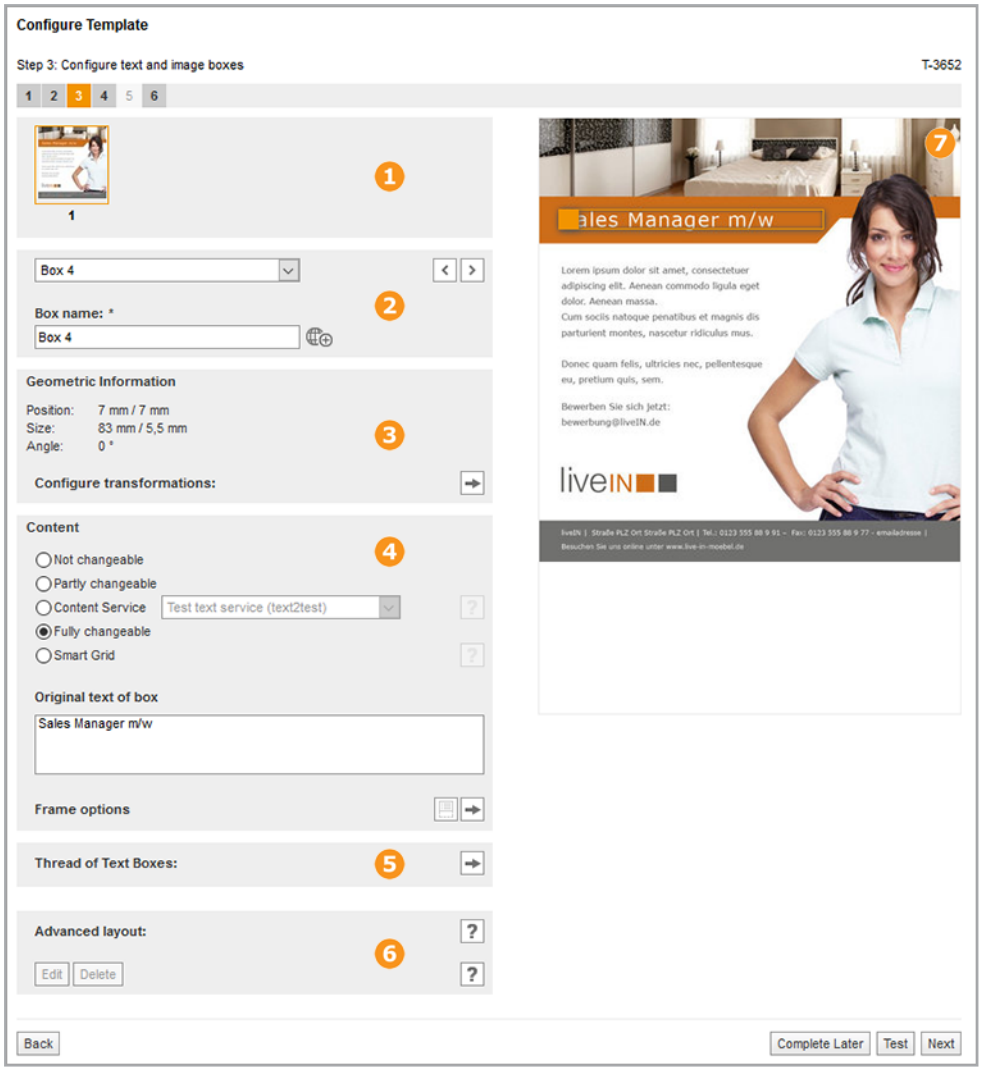
Associated Tasks

See *Sources for Text Variables* on page 208 and *Sources for Image Variables* on page 228.

9.2.1.3 Step 3

In step 3, you define which text and image boxes can be changed and how. A variable is created for each changeable element. You also define the available transformations and any text flows over multiple pages, and create an advanced layout if necessary.

Page Setup

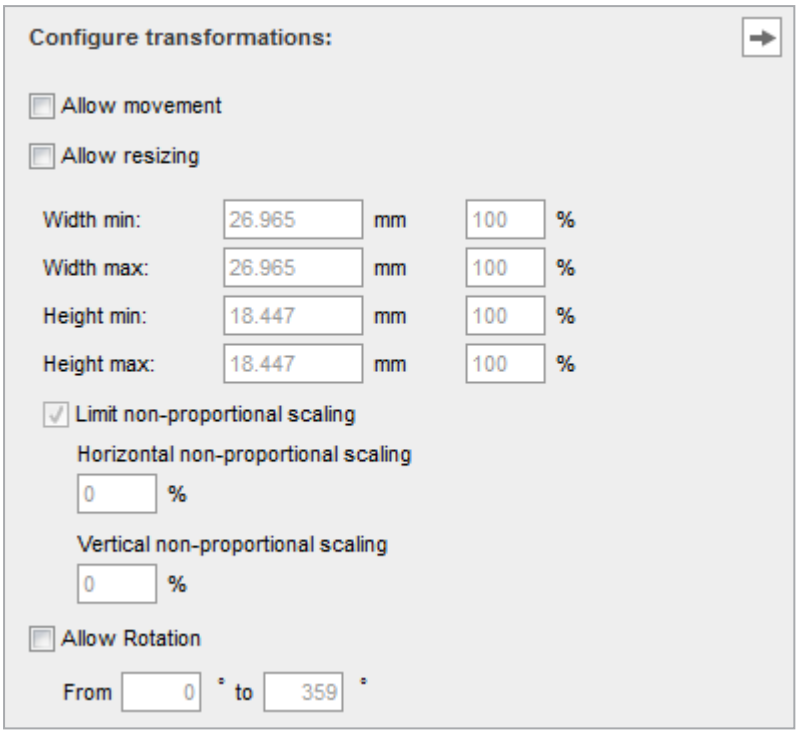


1 and 2: Page and Box Navigation

In these areas, you choose the page and box to be edited. For more detailed information, see *Box and Variable Navigation* on page 416.

3 Geometric Information

This area displays the geometric information about the box that is currently selected. You also configure the available transformations for the box. Choose . The following fields are displayed:



For detailed information, see *Displaying Text and Image Boxes* on page 247.

4 Content

In this area, you choose whether and, if so, which content in the box can be edited by the document creator. You can find a detailed description of the options in *Changeable Text Box Content* on page 200 and *Changeable Image Box Content* on page 224.

If you are creating a scalable basic template or Smart Group, the editing fields for alignment and resizing are also displayed in this area. The alignment defines how the position of the box changes when the document is scaled non-proportionally. As well as the alignment for moving a box during document scaling, you can also define the vertical and horizontal size adjustment as a percentage. For more detailed information, see *Alignment and Size Adjustment* on page 269.

You can also specify frame options for the box. For more detailed information, see *Displaying Text and Image Boxes* on page 247.

5 Thread of Text Boxes

In this area, you configure the threading in the template. For detailed information, see *Threaded Text Boxes* on page 219.

6 Advanced Layout

To make document editing more user-friendly when the document contains a large number of variables, use the advanced layout. You configure an advanced layout in this area. For detailed information, see *Advanced Layout* on page 293.

7 Page Preview

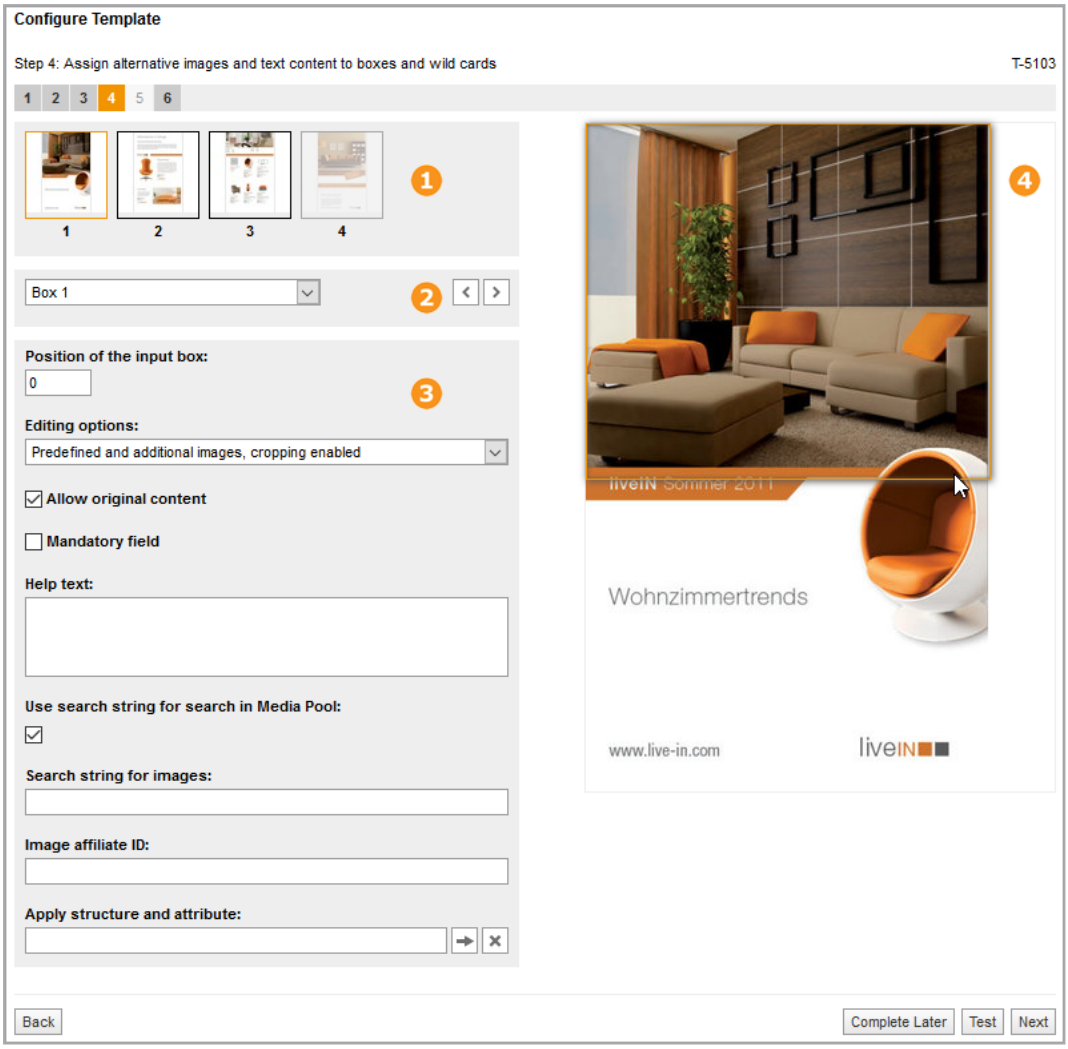
The page that is currently selected is displayed in the area on the right. The box that is currently selected is highlighted with a colored frame. For information about navigating between the pages and boxes, see *Box and Variable Navigation* on page 416.

Associated Tasks

- *Configuring a Partly Changeable Text Box* on page 205
- *Configuring a Fully Changeable Text Box* on page 206
- *Configuring the Change Options for a Thread Created in the INDD File* on page 221
- *Threading Boxes in Template Design* on page 222
- *Configuring a Fully Changeable Image Box* on page 226
- *Transformation* on page 247
- *Frame Options* on page 250
- *Alignment and Size Adjustment* on page 269

9.2.1.4 Step 4

In step 4, you choose the sources from which the variables specified in step 3 are filled and create help tools for the document creator. You also create variants in this step. Note that the step displayed is different in the text variable and the image variable. The screen shot below displays the interface for an image variable.



1 and 2: Page and Variable Navigation

In these areas, you choose the page and variable to be edited. For more information, see *Box and Variable Navigation* on page 416.

3 Content

In this area, you edit the following items:

- Source: who or what supplies the content?
- (For text variables only) Format: how is the content processed or checked?
- (For image variables only) Which section of the image is displayed?
- Which help tools provide support for the document creator?

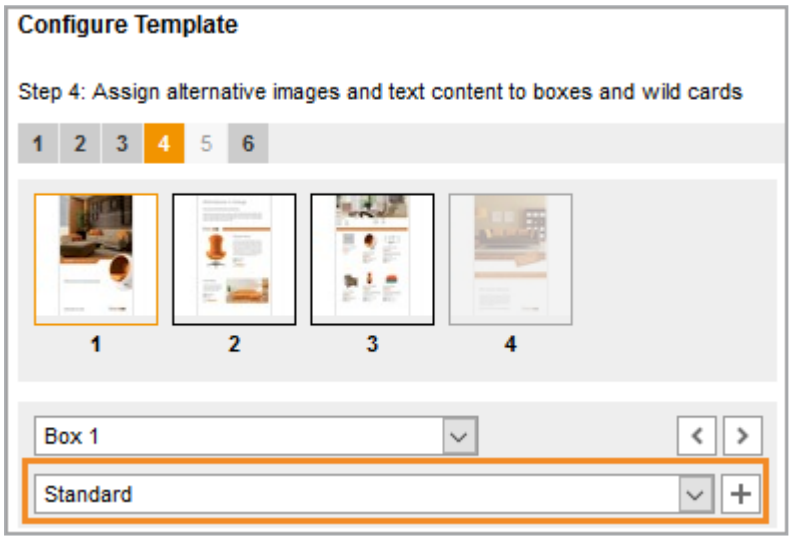
For detailed information, see the relevant sections in *Content of Text Boxes* on page 199 and *Content of Image Boxes* on page 223.

4 Page Preview

The page that is currently selected is displayed in the area on the right. The box that is currently selected is highlighted with a colored frame. For information about navigating between the pages and boxes, see *Box and Variable Navigation* on page 416.

Variants

If a dropdown is available in the template (step 1, *Content* area, Manage Drop-downs), you can create variants in step 4. For this purpose, a picklist is displayed for the variants below the variable navigation:



For a detailed description of the variants function, see *Variants* on page 238.

If you have created a variant, all the subsequent fields are provided with a check-box. If you activate the checkbox, you can configure the corresponding function for this variant differently from the default setting.

Associated Tasks

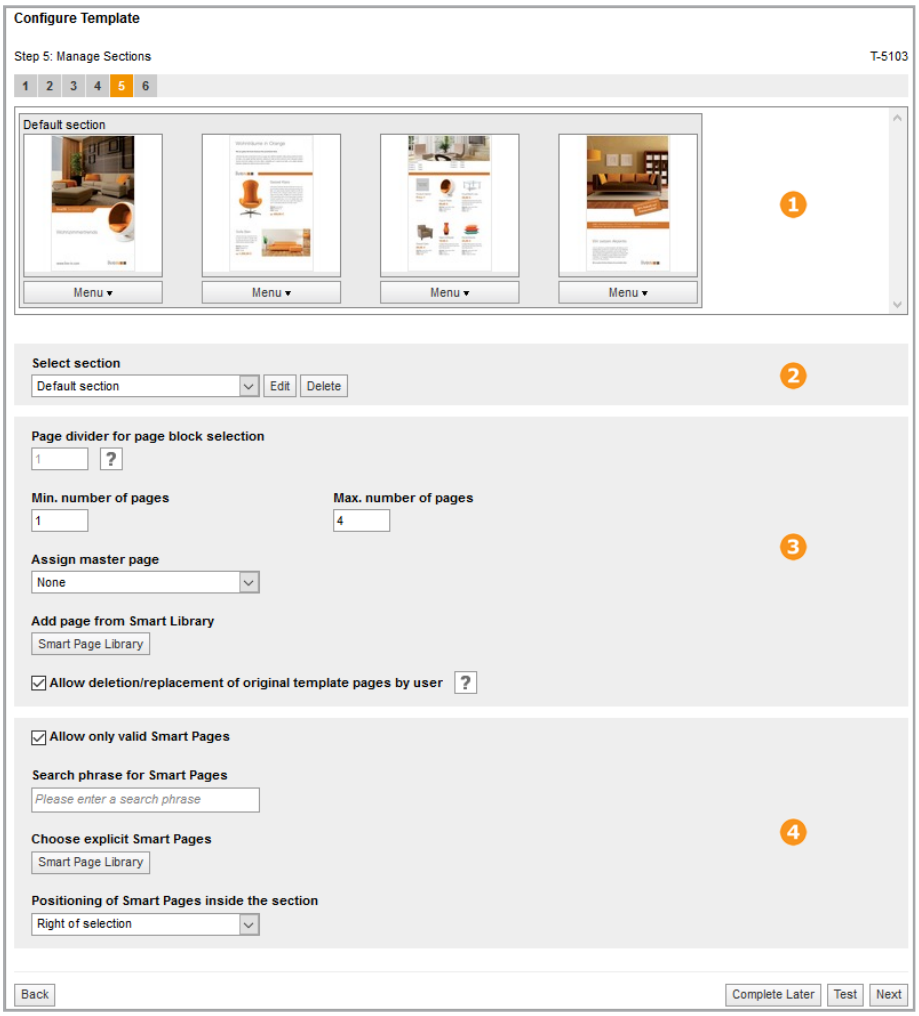
- *Sources for Text Variables* on page 208
- *Sources for Image Variables* on page 228
- *The Format of the Content* on page 215 (for text variables)
- *Image Section* on page 234 (for image variables)
- *Help Tools* on page 216 (for text variables)
- *Help Tools* on page 236 (for image variables)

- *Configuring Content Variants for Text and Image Boxes in an INDD Template* on page 242
- *Configuring Color Variants* on page 243

9.2.1.5 Step 5

In step 5, you choose which document structure can be created with the template. Note that step 5 can be opened only if you create a basic template that can be enhanced with Smart Pages.

Page Setup



1 Manage Sections

This area shows the sections created in the template. Sections give you the following options:

- You can map chapters or content sections at the highest document level.
- You can use sections to determine the part of a document in which the document creator can add, replace, or delete pages.
- You can also configure properties such as page dividers or the maximum number of pages separately for each section.

In this area, you can create, edit, and delete new sections and add and delete Smart Pages.

For detailed information, see *Sections* on page 275.

2 Selecting a Section

In this area, you select a section that you then configure in the subsequent areas 3 and 4.

3 Properties of the Section

In this area, you define the following properties for the section selected in area 2:

- Page divider for the section
- Permitted minimum and maximum number of pages
- Master pages for the section
- If you do not want the number of pages to be changed, you can allow pages to be replaced.

For detailed information, see *Sections* on page 275.

4 Properties of Smart Pages

In this area, you define the properties of the Smart Pages that you add to the template or that the document creator adds to the document. Note that the area is visible only if the permitted document structure allows the insertion of Smart Pages. For detailed information, see *Sections* on page 275.

Associated Tasks

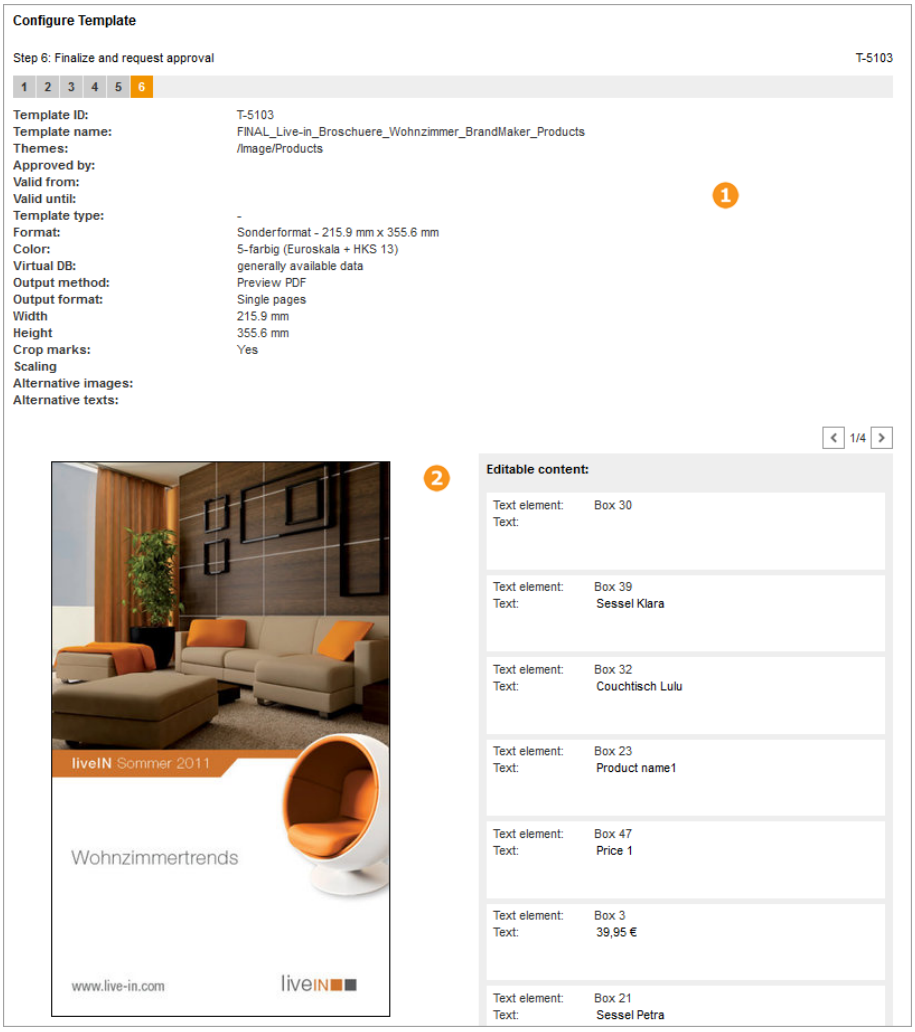
- *Creating a Section* on page 280
- *Editing a Section* on page 281
- *Deleting a Section* on page 281
- *Configuring a Section as Non-Changeable* on page 282

- *Adding a Smart Page* on page 282
- *Deleting a Smart Page* on page 283
- *Configuring Settings for Smart Pages* on page 283

9.2.1.6 Step 6

The last step lists the configured settings for verification. When you complete this step, the template is either finalized or you request for the template to be included in a VDB that requires approval. If the request is approved, the finalized template is also made available for document creation. For more information, see *Finalization and Release* on page 302.

Page Setup



1 Properties

The top area displays the properties of the template.

2 Preview and Configured Elements

The bottom area displays the original template pages. You can use the arrow buttons < > to switch between the pages. On the right-hand side of the area, there is a list of all the elements that you have configured as editable.

9.2.2 Designing an HTML Template

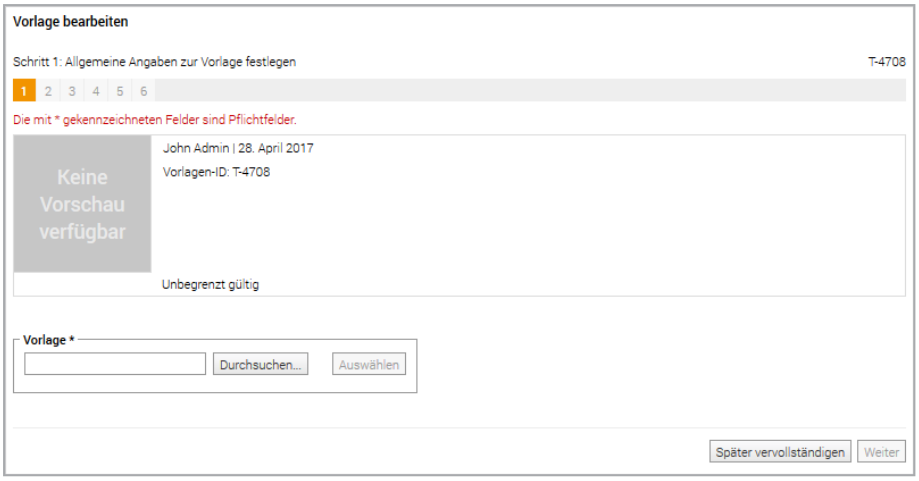
The design of an HTML template is broken down into the following steps:

- Step 1: in *Step 1* below, you select the HTML files that you want to use for the HTML template. You then configure the settings for the properties and quality assurance.
- Step 2: in *Step 2* on page 409, you define alternative content that is made available to the document creator.
- Step 3: in *Step 3* on page 411, you define which text and image boxes can be changed and how. A variable is created for each changeable element. You also define an advanced layout if necessary.
- Step 4: in *Step 4* on page 412, you choose the sources from which the variables specified in step 3 are filled and create help tools for the document creator.
- Step 5: step 5 is skipped because a document structure cannot be created for HTML templates.
- Step 6: *Step 6* on page 415 lists the configured settings for verification. When you complete this step, the template is either finalized or you request for the template to be included in a VDB that requires approval. If the request is approved, the finalized template is also made available for document creation.

9.2.2.1 Step 1

In step 1, you select the ZIP file containing the files required for the HTML template. You then configure the settings for the properties and quality assurance.

When you click > *Brand Template Builder* > *Designer* > *New HTML Template*, step 1 of Template Design is displayed:



Firstly, click *Select* to select a ZIP file (see *Selecting the HTML File* on page 307). After you selected the file, additional fields are displayed:

These fields are divided into the following page sections:

Template

After you selected a ZIP file, you can apply a configuration from a different template (for example, from a test system). This is useful, for example, when you are transferring a template to a different system (see *Transferring a Template to a Different BrandMaker System* on page 374).

Meta Data, Validity Periods and Custom Properties

This area displays the template properties that you as the designer can change. They include, for example, the name of the template, its validity, and information that you can store for the user. You can find a full list of the properties under *Properties of the HTML Template* on page 308.

Output

As the designer, you can specify whether the documents can be published in the Media Pool. For more information, see *Production* on page 349.

Process

As the designer, you have the option of presetting various items for the document creation process. They include, for example, the specification of an approval workflow if the document is only to be used after receiving positive approval, and the specification of mandatory steps before the document is edited. For more information, see *Customizing Process* on page 346.

Content

The Content area is divided into the following sub-sections:

Dropdowns, variants and affiliates

In this area you decide whether the assignment of an affiliate to the document can be edited by the document creator. Also, you manage dropdowns. Dropdowns fulfill two tasks in Brand Template Builder:

- You use dropdowns as selectors when you configure variants of a template.
- You use dropdowns as connectors for accessing the content of custom structures as the sources for text and image variables.

For more information, see *Dropdowns* on page 353.

Images

In these areas, you can define the check measures for images in the document. They include, for example, checking the validity of images. For more information, see *Check Features* on page 344.

Documents locales

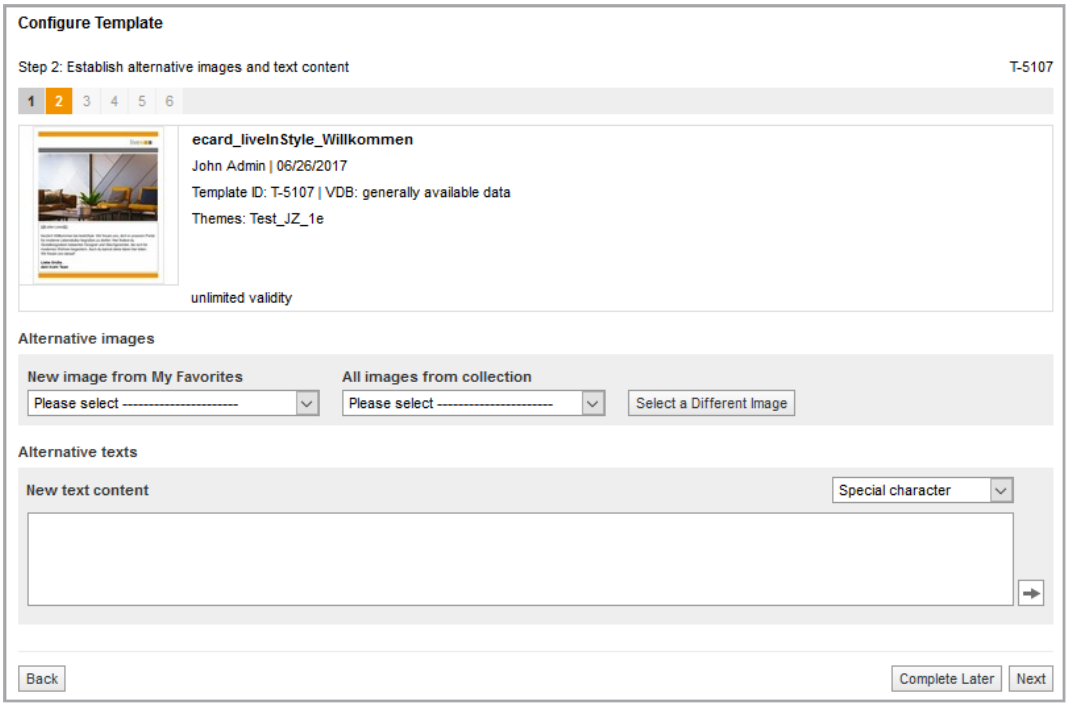
In this section you configure the multilingualism of the templates and the documents based on them. For more information, see chapter *Multilingualism* on page 311.

Associated Tasks

- *Selecting the HTML File* on page 307
- *Creating a Template Dropdown* on page 355
- *Creating a Smart Dropdown* on page 356
- *Making a Smart Dropdown Accessible in a Template* on page 358
- *Creating Cascading Dropdowns* on page 357
- *Deleting a Dropdown* on page 359

9.2.2.2 Step 2

In step 2, you define the alternative images and texts that are available to the document creator.



Images

Alternative images that you want to make available to the document creator must be created as assets in the Media Pool. As the template designer, you have the following options for defining assets as alternative images:

- The asset is marked as one of your favorites in the Media Pool. In this case, you select a favorite as an alternative.
- The asset is part of a Media Pool collection that you can access. You then select all the images in the collection as alternatives.
- You also have the option of creating images that are not marked as favorites and not part of a collection as alternatives.

For more information about creating alternative images, see *Sources for Image Variables* on page 330.

Texts

You can enter alternative texts and use them to specify alternative formulations or even translations for the document creator. Whether or not the document creator can change the texts is dependent on other settings. For more information, see *Sources for Text Variables* on page 315.

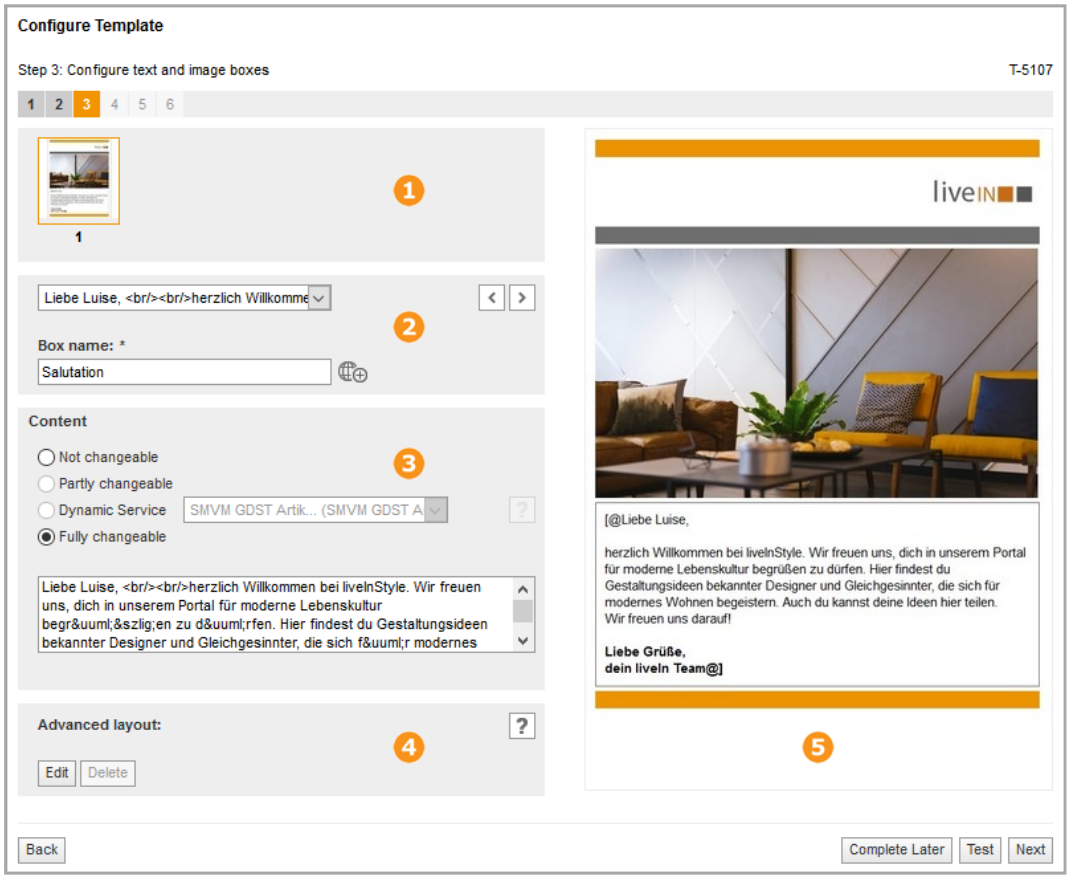
Associated Tasks

See *Sources for Text Variables* on page 315 and *Sources for Image Variables* on page 330.

9.2.2.3 Step 3

In step 3, you define which text and image boxes can be changed and how. A variable is created for each changeable element. If necessary, you can create an advanced layout.

Page Setup



1 and 2: Page and Box Navigation

In these areas, you can find the page and box navigation. Note that HTML templates are always single-page templates and you therefore do not need to select a page. For more information, see *Box and Variable Navigation* on page 416.

Geometric Information

This area is displayed only for image boxes. For HTML templates, the position and size of the selected image box is displayed.

3 Content

In this area, you choose which content in the box can be edited by the document creator. You can find a detailed description of the options in *Changeable Text Box Content* on page 314 and *The Variable Content of an Image Box* on page 326.

4 Advanced Layout

To make document editing more user-friendly when the document contains a large number of variables, use the advanced layout. You configure an advanced layout in this area. For detailed information, see *Advanced Layout* on page 345.

5 Page Preview

The page that is currently selected is displayed in the area on the right. For information about navigating between the pages and boxes, see *Box and Variable Navigation* on page 416.

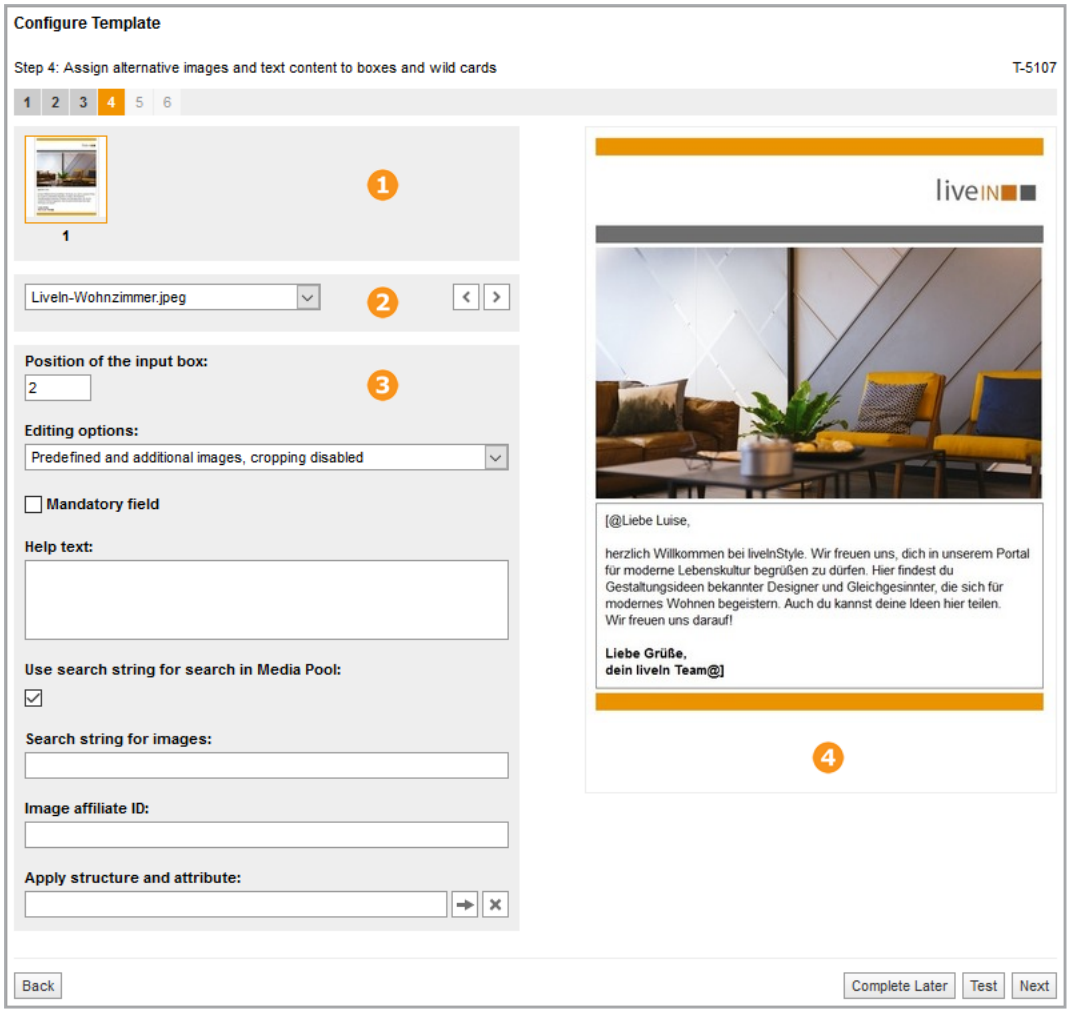
Associated Tasks

- *Changeable Text Box Content* on page 314
- *Configuring a Fully Changeable Image Box* on page 327
- *Displaying Text in Text-to-Image Boxes* on page 327
- *Creating an Advanced Layout* on page 293
- *Deleting an Advanced Layout* on page 295

9.2.2.4 Step 4

In step 4, you choose the sources from which the variables specified in step 3 are filled and create help tools for the document creator. You also create variants in this step. Note that the step displayed is different in the text variable and the image variable. The screen shot below displays the interface for an image variable.

Page Setup



1 and 2: Page and Variable Navigation

In these areas, you choose the page and variable to be edited. Note that HTML templates are always single-page templates and you therefore do not have to select a page. For more information, see *Box and Variable Navigation* on page 416.

3 Content

In this area, you edit the following items:

- Source: who or what supplies the content?
- (For text variables only) Format: how is the content processed or checked?
- (For image variables only) Which section of the image is displayed?
- Which help tools provide support for the document creator?

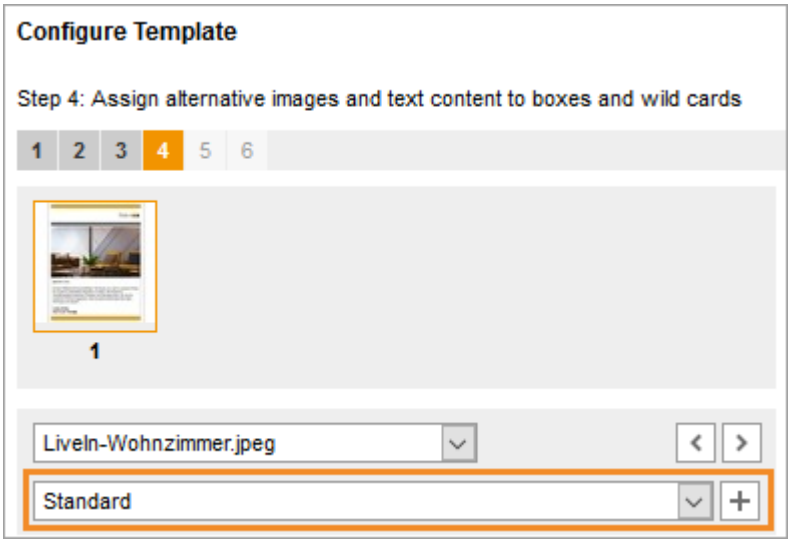
For detailed information, see the relevant sections in *Content of Text Boxes* on page 313 and *Content of Image Boxes* on page 325.

4 Page Preview

The page that is currently selected is displayed in the area on the right. For information about navigating between the pages and boxes, see *Box and Variable Navigation* on page 416.

Variants

If a dropdown is available in the template (step 1, *Content* area, Manage Dropdowns), you can create variants in step 4. For this purpose, a picklist is displayed for the variants below the variable navigation:



For a detailed description of the variants function, see *Variants* on page 339.

If you have created a variant, all the subsequent fields are provided with a checkbox. If you activate the checkbox, you can configure the corresponding function for this variant differently from the default setting.

Associated Tasks

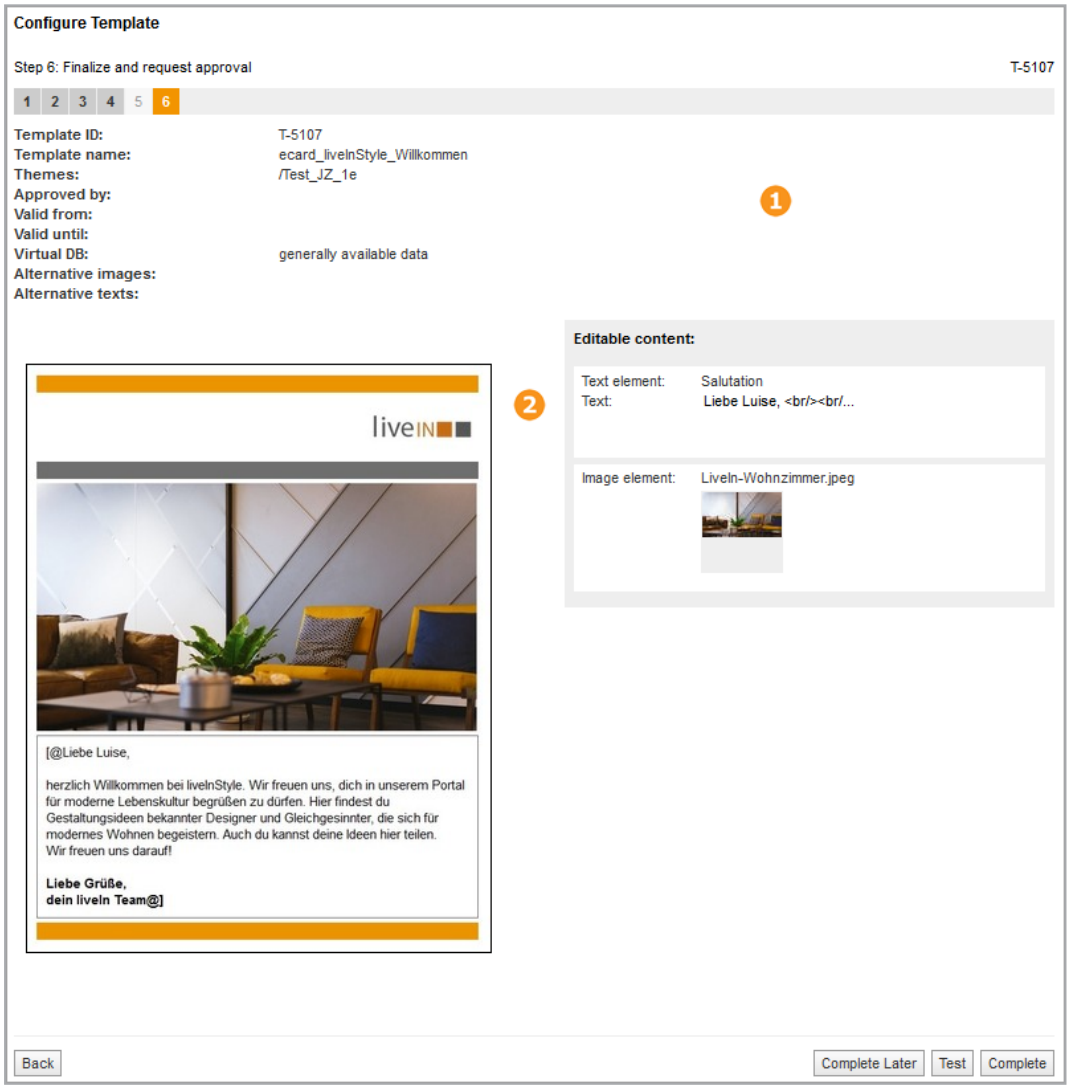
- *Sources for Text Variables* on page 315
- *Sources for Image Variables* on page 330
- *The Format of the Content* on page 321 (for text variables)
- *Image Section* on page 335 (for image variables)
- *Help Tools* on page 322 (for text variables)

- *Help Tools* on page 337 (for image variables)
- *Configuring Variants for Text and Image Boxes in an HTML Template* on page 342

9.2.2.5 Step 6

The last step lists the configured settings for verification. When you complete this step, the template is either finalized or you request for the template to be included in a VDB that requires approval. If the request is approved, the finalized template is also made available for document creation. For more information, see *Finalization and Release* on page 350.

Page Setup



1 Properties

The top area displays the properties of the template.

2 Preview and Configured Elements

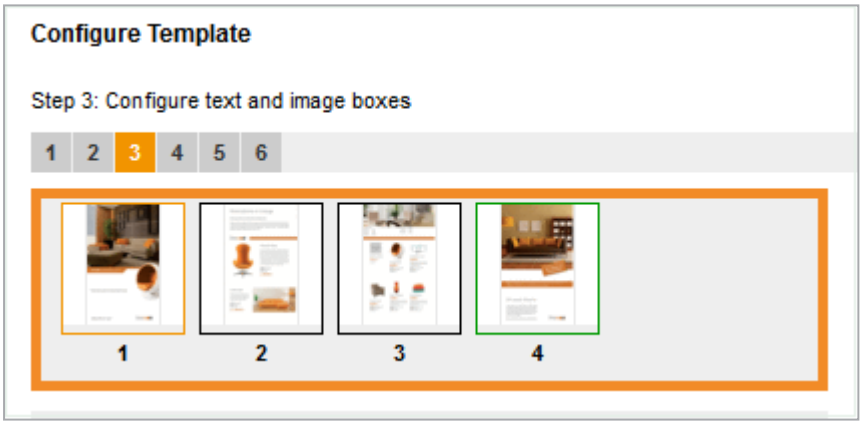
The bottom area displays a preview of the original template. On the right-hand side of the area, there is a list of all the elements that you have configured as editable.

9.2.3 Box and Variable Navigation

When you configure the change options for boxes, you must select the boxes and the variables specified in them individually. This section explains how this selection works in Template Design.

For Multi-Page Templates: Page Selection

You can access a box or variable in a multi-page template only if you have selected the page to which the box or variable is assigned. A page preview is displayed at the top of steps 3 and 4 of Template Design:



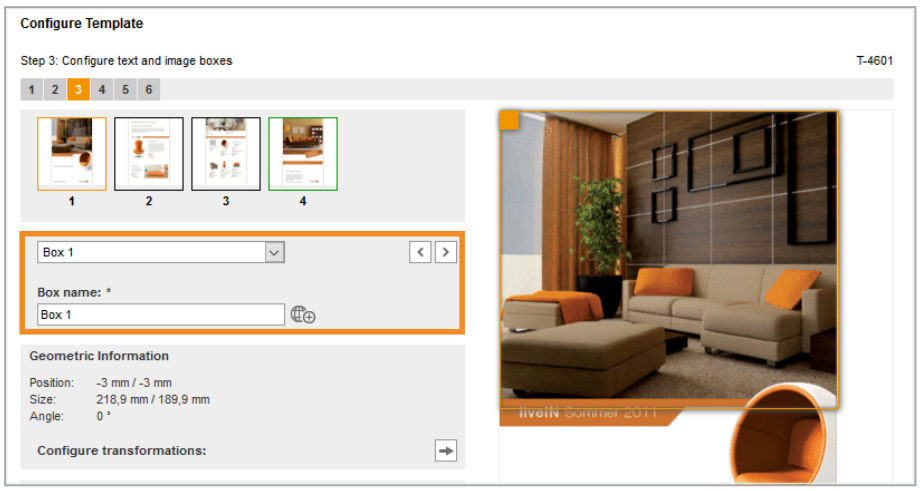
The page that is currently selected is framed with the highlight color (in the image: orange) and is displayed in a larger preview on the right. You click a page to select the page. Pages that you have already edited are framed in green. Pages with a black frame are pages that you have not edited yet.

Note that you can select only pages for which variables (that is, editable content) are created in step 4. Pages that do not contain variables are grayed out.

Note that HTML templates are always single-page templates!

Step 3: Box Selection

If you select a page in step 3 of Template Design, all the boxes on this page are displayed in the picklist below it.



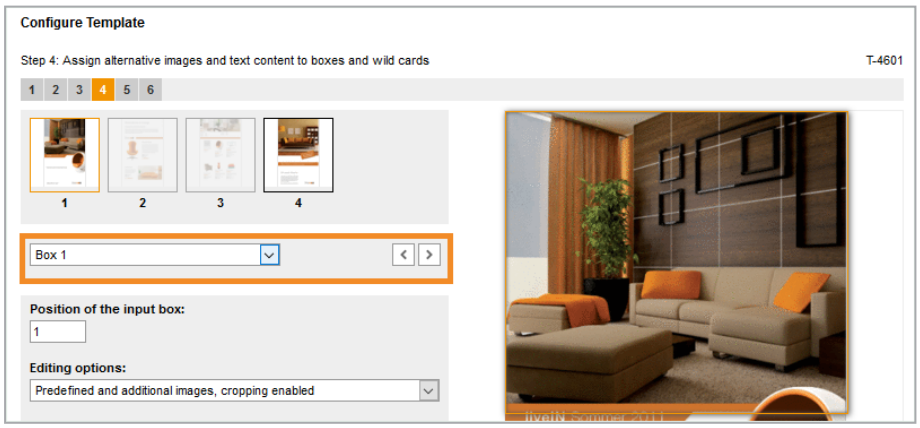
If you select a box in the list, the settings that you can edit for this box are displayed below it. You can use the arrow buttons < > to switch between the boxes. Your selected box is highlighted in a frame with the highlight color (orange in the image) in the large preview on the right.

If a descriptive box name has not been provided in the INDD file, the entered name is comprised of *Box* and a consecutive number (Box 1 in the image).

Below the picklist, you can enter a different name for the box, including translations into your available interface languages. Enter a name and choose . In the dialog box that opens, select the language in which you have entered the name and choose *Next*. In the next dialog box, enter the name in other languages.

Step 4: Variable Selection

In step 4, you edit text and image variables. If you select a page in step 4, all the variables assigned to this page are displayed in the picklist below it.



If you select a variable in the list, the settings that you can edit for this variable are displayed below it. You can use the arrow buttons < > to switch between the variables. The box to which the variable is assigned is highlighted in a frame with

the highlight color (orange in the image) in the large preview on the right. Note that multiple variables can be assigned to a box and you then do not see a change in the large preview if you select a different variable. This may be the case for text variables that you created in a partly changeable text box (INDD template) or that are created as input parameters for a content service.

10 Resources

This section provides additional guidance for specific situations to complement the functional descriptions and the description of the user interface in *Interface* on page 381.

Use Cases

This section provides practical information for the following typical situations.

- You would like to learn how to use Brand Template Builder under the working conditions in your company (processes, distribution of tasks, etc.). A typical question in this area is: how do I prepare documents in different languages?
- You need a general overview of how to handle complicated issues. Typical questions in this area include: how do I configure a template for business cards? How do I configure a brochure with data filled from Marketing Data Hub?

An overview is available in *Use Cases* on the facing page.

FAQ

This section provides answers to questions about specific situations, such as:

- Can I request quotations from different printing offices first or else how is it made sure that the most cost-effective offer is selected?
- How do I find the templates that are available at present?
- How do I limit my text field or does it matter if I enter too much text?

An overview is available in *FAQ* on page 423.

Additional Documentation

This section contains links to additional documents which you might also find useful (see *Additional Documentation* on page 424).

10.1 Use Cases

This section provides practical information for the following typical situations.

- You would like to learn how to use Brand Template Builder under the working conditions in your company (processes, distribution of tasks, etc.). A typical question in this area is: how do I prepare documents in different languages?
- You need a general overview of how to handle complicated issues. Typical questions in this area include: how do I configure a template for business cards? How do I configure a brochure with data filled from Marketing Data Hub?

You can search for the relevant use cases in the overview below:

- *Creating Templates* on the next page
- *Configuring Document Production* on the next page
- *Managing Templates* on the next page

Note

This section is still under construction. If you have any questions that this section does not completely answer, please email us at documentation@brandmaker.com.

10.1.1 Creating Templates

Note

This section is still under construction. If you have any questions that this section does not completely answer, please email us at documentation@brandmaker.com.

10.1.2 Configuring Document Production

Note

This section is still under construction. If you have any questions that this section does not completely answer, please email us at documentation@brandmaker.com.

10.1.3 Managing Templates

Note

This section is still under construction. If you have any questions that this section does not completely answer, please email us at documentation@brandmaker.com.

10.2 FAQ

This section provides answers to questions about specific situations. The questions are arranged according to the following topics:

- *Creating an INDD File* below

> **Note**
>
> This section is still under construction. If you have any questions that this section does not completely answer, please email us at documentation@brandmaker.com.

10.2.1 Creating an INDD File

- *Variables* below

10.2.1.1 Variables

Variable Is not Created Automatically

In the INDD file, I framed a text passage with # to create a variable. However, when I create the template, the text passage is not detected as a variable and is not created automatically.

REASON

Check whether the text passage framed with # includes a hard or soft return. A variable must not contain these characters. Other special characters can be included in a variable.

SOLUTION

- Remove the hard or soft return from the variable. If you are concerned that their removal may negatively affect the layout, check whether you can allow post-editing of the layout by the template designer (see *Sources for Text Variables* on page 208).
- If possible for the content, divide the text passage into two variables.

10.3 Additional Documentation

This page provides links to documents containing additional information.

- Brand Template Builder User Manual
- Administration Manual
- Media Pool Administration Manual
- Media Pool User Guide
- Job Manager and Marketing Data Hub Administration Manual
- Job Manager User Manual
- Marketing Data Hub User Manual
- Marketing Shop Administration Manual and User Manual

GLOSSAR

A

Asset

File and its metadata as well as previews in the Media Pool module. For example, in Brand Template Builder you can use graphic assets from Media Pool.

B

Basic template

A basic template is a template with which a user starts Customizing. This can be a leaflet or an ad, for example. A basic template can have the following characteristics: - Enhancement with a Smart Group - Enhancement with a Smart Page - Scalable - For mass personalization

C

Category

Characteristics of an object, such as a product, whose product data is inserted in an INDD document. Templates are also assigned to categories. Examples of categories are target group or document types.

Customizing

Customizing is the creation of documents for specific purposes, such as brochures or ads. In Brand Template

Builder, customizing takes place in the Customizing Wizard and the document editor.

Customizing wizard

The Customizing Wizard is the superordinate overview page in Brand Template Builder on which the individual processing steps for customizing a document are called. Selections and symbols support you and indicate which steps have been carried out or are still to be carried out.

D

Data of data objects

Data of different objects that is relevant for marketing and is managed in the Marketing Data Hub module. Data from Marketing Data Hub can be used in Brand Template Builder for example in brochures or advertisements.

Document

File created based on a template and customized according to the editing rules stored in the template.

Document editor

In the document editor, the contents and structure of a document are edited. The document editor is opened when the document creator chooses step 3 in the Cusotmizing Wizard.

Dynamic grid

Grid that the document creator creates and in which either Smart Groups or images are inserted. Thus, dynamic grids give the document creator much more design freedom.

F

Finalizing

Termination of document or template creation. You may need to apply for approval when finalizing.

G

Grids

So that the document creator can insert Smart Groups, so-called grids must be present in the document as placeholders. Either the template designer has created static grids in the template or the document creator creates dynamic grids in the document.

H

HTML document

Document based on an HTML template. HTML documents can be used, for example, to create e-mails, animated advertising banners for online advertising or static HTML pages. All files belonging to an HTML document are output as ZIP files.

I

INDD document

Document based on an INDD template. INDD documents are mainly used to create printed products such as business cards, brochures or advertisements. However, the document can also be output as a PDF, JPEG or EPS file or in INDD or IDML format.

M

Mass personalization

This property is a mail merge function. With a basic template for mass personalization, the user creates several documents, whereby the variable components are filled with the data of an Excel file. A typical application is address data for a letter or personal data for a business card. Note that you can only use this property in one-page base templates that cannot be enhanced by Smart Pages or Smart Groups.

Meta template

INDD templates can be structured in meta templates. In a meta template, templates with identical contents are combined and made available in different formats. For each selectable format, a separate template or a scalable template covering the format must be created in the BrandMaker system. The ID (identification number) of a meta template is preceded by the prefix "MT".

O

Object Handles

The text and image boxes that can be edited in a document in the document editor are marked with an orange object handle. When the document creator clicks the object handle, the box is selected to edit its contents, for example. If a white down arrow is also displayed on the object handle, a menu with additional functions is available on the object handle. Note that the functions available depend on the configuration of the template by the designer and the tab selected in the document editor.

Output method

The output method specifies which print method is used to output the document. For example, a document can be created as a high-res or low-res PDF. Several output methods can be defined for a document.

R

Real-time preview

When a document is based on a template with real-time preview enabled, the preview image is automatically updated in the document editor. To see changes to the document, you do not

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have to trigger the update of the document preview manually.

S

Smart Group

A Smart Group is a one-page INDD template that is used in a template as part of a page. An example are interchangeable elements that represent product data (product image, technical data, price) in a brochure.

Smart Page

Template that contains at least one complete page and is designed to be integrated into basic templates. A Smart Page can have a characteristic: - Enhancement with a Smart Group

Static Grid

Grid that the template designer creates during template creation and that cannot be changed by the document creator.

T

Template

INDD or HTML file for which the template designer determines the editing rules according to which the document creator can create documents from it.

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