BrandMaker GmbH

Brand Template Builder
User Manual

Version 7.0

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Inhalt

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Get Started

1

You can use Brand Template Builder to create CI-compliant documents in various formats. If you look at the process, you will notice that it can be divided into very simple sub-tasks, such as creating, opening, and editing a document. If you require basic information about documents beforehand, see the section *Basics* on the facing page.

Objectives and Structure of this Manual

This manual explains how to create a document from a template. The manual firstly describes the process of creating a document for INDD templates and then for HTML templates. You can learn about the individual processing steps here.

The manual answers important questions such as:

- How do I create a document?
- What are my editing options?
- What are the processing steps for INDD documents, online templates, and HTML documents?
- How do I share and manage documents?

Recommended for New Users

If you are unfamiliar with the Brand Template Builder module, we recommend that you familiarize yourself with the following tasks:

- *Searching for and Using Templates* on page 17
- *Editing a Document* on page 27

For Experienced Users in a New Version

If you are an experienced user and would like an overview of the new functions in the current 7.0 version, please refer to the *New and Changed* on page 12 section.

1.1 Basics

A template designer creates templates for creating documents in Brand Template Builder. The templates are based on either an INDD file (Adobe InDesign) or HTML files.

From INDD templates, you create INDD documents designed for printing or digital distribution in the formats PDF, INDD, IDML, JPEG, and EPS. Typical examples include business cards, adverts, or brochures.
There are also online templates that you can use to create ads for digital campaigns, such as banner ads or ads on social media like Facebook, Twitter, or Instagram. Online templates are output as image or HTML files.
From HTML templates, you create HTML documents that are used as e-mails, digital advertising banners, or static HTML pages.

> 📋 **Note**
>
> The creation of HTML documents is not enabled in all systems. If you have any questions, please contact your system administrator.

What you work on as a document creator in

The Designer creates a template and defines the following:

- Which features and elements can be changed?

- How you can change the features and elements as a document creator?

When you create a document, you edit the changeable elements in a copy of the template file. Examples are:

- Texts

- Images (only for INDD and HTML templates)

- Feature of the document such as the size or the number of pages (only for INDD templates)

For editing you do not need a local installation of a program with which you could edit the format of the template file, for example Adobe InDesign or an HTML editor. You edit the created documents in the user interface of Brand Template Builder.

1.2   New and Changed

In this section, you can find the highlights of the features in the module Brand Template Builder in version 7.0.

Online Templates

Version 7.0 expands the Brand Template Builder module for generating digital advertising. With the introduction of online templates, document creators can create a variety of output formats for online advertising with just a few inputs, such as for banner ads or for social media like Facebook, Instagram, LinkedIn, and Twitter. For online templates, the designer needs to create several JSON files in addition to the ads, which define the editability of the ads. In return, there is no need for extensive editing in the template design.

For more information, see chapter LLL

Refer to the release notes for more detailed information about the changes in version 7.0.

1.3 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 >*.

Creating a Docu- 2
ment

You have a number of different options for creating a document.

Using a Template as a Basis

In general, you create a document based on a template:

1. Search for a template.
2. Use the template.

Note that a tile may represent a group of templates that have the same value in a property. If you start with such a template group, a dialog guides you through a selection process. For example, you define properties such as the page size. As soon as you have defined a template, the customizing of the document is started.

If you have any questions about the selection process, please contact your system administrator. The system administrator configures the selection process and defines the user-defined properties.

For more information, see *Searching for and Using Templates* on the facing page.

Using a Finalized Document as a Basis

To create a new document based on a finalized document, proceed as follows:

1. Search for the document.
2. Copy and adapt the document.

In this case, you create the document based on the contents of the copy. The editing options are equivalent to the options for the template on which the copied document is based. For more information, see *Searching for, Copying, and Adapting a Document* on page 20.

Next Step

In the next step, you edit the document (see *Editing a Document* on page 27).

2.1 Searching for and Using Templates

You can use the following options to search for a template:

- Search through your templates by entering one or more keywords in the full-text search and combining it with the search for the criteria *Categories*, *Tags*, *Format*, *Output method*, and *Color* if necessary.

- Access a template that you used recently.

- Mark frequently used templates as favorites and use a favorite.

- Search through all your accessible templates using the detailed criteria in the advanced search.

> **Note**
>
> Note that the search in Brand Template Builder can be configured by the system administrator. The searchable properties and their order may therefore change. Contact your system administrator if you have any questions.

Full-Text Search and Other Criteria

1. Click > *Brand Template Builder*.

   The *Overview* home screen is displayed. Alternatively, you can also perform a search under > *Brand Template Builder > Templates*.

2. Enter your search criteria.

3. Press Enter.

   The results are displayed in a hit list.

4. Enter additional characteristics in the search criteria if required.

5. Choose *Search for templates*.

6. Select the template that you want to use from the hit list.

   Note: Designers may have grouped several templates. Such a group is displayed as a tile in a search result and you can recognize these groups by the fact that only two icons are displayed on the bottom right of the tile, the pen icon and the stack icon ⬙. If you are unsure whether the group contains the template you want, click the stack icon. Then an overview is opened, in which all templates of the group are displayed. However, you will not select a template until you click *Create* in step 7. You are then be guided automatically through all the features.

7. Click *Create*.

8. For INDD documents only:

    A dialog may be displayed where you can specify additional features.

    a. Select the characteristics of the document.

    b. Click *Create Document*.

9. For online documents only:

    An overview is displayed where you can check if you have selected the correct template.

    a. Click *Edit*.

The document is then opened for editing. Refer to *Editing a Document* on page 27

Using a Template that You Used Recently

1. Click > *Brand Template Builder*.

    The *Overview* home screen is displayed. The *Recently Used* area displays the last five templates that you used to create a document.

2. Choose *Create* next to one of the templates.

A dialog box may be displayed in which you can define additional characteristics. The document is then opened for editing. Refer to *Editing a Document* on page 27

Using Favorites

Prerequisite: You have marked templates as favorites (see *Saving a Template as a Favorite* on page 141.

Using One of the Last Five Used Favorites

1. Click > *Brand Template Builder.*

2. The *Overview* home screen is displayed. The *Favorites* area displays the last five favorites that you used to create a document.

3. Choose *Create* next to one of the templates.

A dialog box may be displayed in which you can define additional characteristics. The document is then opened for editing. Refer to *Editing a Document* on page 27

Selecting from All Your Favorites

> 📋 Note
>
> This action is only valid for INDD and HTML templates.
> It is currently not possible to mark an online template as a favorite.

1. Choose *> Brand Template Builder > Manager > Templates > Favorites*.

    All the templates that you have marked as favorites are displayed.

2. Select the template that you want to use from the hit list.

3. Click *>* ➡ *> Customize* on the template.

You have created a document that is opened in the customizing wizard. Refer to *Editing a Document* on page 27

Advanced search

> 📋 Note
>
> This action is only valid for INDD and HTML templates.
> It is not possible to find an online template in the advanced search.

1. Choose

    - *> Brand Template Builder > Manager > Templates > Overview > Advanced Search* or

    - *> Brand Template Builder > Manager > Templates > Search*

    The advanced search is displayed.

2. Enter the search criteria. For more information, see *Templates* on page 161.

3. Click *Search*.

    The results are displayed in a hit list.

4. Select the template that you want to use from the hit list.

5. Click *Customize*.

You have created a document that is opened in the customizing wizard.

2.2   Searching for, Copying, and Adapting a Document

You can use the following options to search for a document:

- Search in your finalized documents.
- Search with the advanced search.
- Search using categories that are assigned to the documents.

> **Note**
>
> This action applies only to INDD and HTML documents.
> It is currently not possible to copy and customize an online document.

Searching in Your Finalized Documents

1. Choose > *Brand Template Builder > Documents*.

   Your documents are displayed.

2. Choose Finalized in the top picklist.

   Your finalized documents are displayed.

3. Optional: Restrict the search result further by entering additional characteristics in the search criteria.

4. Choose next to the document that you want to copy and adapt.

The document and its content are copied and the copy is created as a new document. The document opens in the document editor.

Advanced search

1. Choose > *Brand Template Builder > Customizing > Document Search*.

   The advanced search for documents is displayed.

2. Enter the search criteria. For more information, see

3. Click *Search*.

   The results are displayed in a hit list.

4. Select the document that you want to copy and adapt in the *Finalized* area.

5. Click > > *Copy and adapt* on the document.

The document and its content are copied and the copy is created as a new document. The document is opened in the customizing wizard.

Searching Using Categories

Each document is assigned to at least one category. Categories are characteristics that are created in a structured way in a category tree and managed centrally by administrators. Multiple characteristics can be assigned to a document (for example, target groups and document types).

1. Choose > *Brand Template Builder > Customizing > Document Search > Categories*.

   The category tree is displayed.

2. Click a category.

   The assigned documents are displayed in a hit list.

3. Select the document that you want to copy and adapt in the *Finalized* area.

4. Click > > *Copy and adapt* on the document.

The document and its content are copied and the copy is created as a new document. The document is opened in the customizing wizard.

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Open

3

You can open a document if its status is *In work*. You have the following options for searching for documents with the status *In work*:

- For the last four documents that you created that still have the status *In Progress*, the *In Progress* section in the Documents area on the right-hand side under *> Brand Template Builder > Overview*.

- For your documents with the status *In Progress*, select *In Progress* under *> Brand Template Builder > Documents*.

- Use the advanced search under *> Brand Template Builder > Manager > Documents*. Note that you can only find INDD and HTML documents here.

- Search using the categories assigned to the documents under *> Brand Template Builder > Manager > Documents > Categories*. Note that you can only find INDD and HTML documents here.

The Last Four Documents in Progress

1. Choose *> Brand Template Builder > Overview*.

   The last four documents that you created that still have the status *In Progress* are displayed in the *In Progress* section in the Documents area on the right.

2. Click the preview image of the document (pen icon) that you want to edit.

The document opens.

All Documents that Are in Work

1. Choose *> Brand Template Builder > Documents*.

2. Select the *In Progress* entry at the top of the picklist.

   Your accessible documents with the status *In Progress* are displayed.

3. If necessary, you can further restrict the number of documents displayed using the full-text search or the characteristics *Categories*, *Tags*, *Format, Output method*, and *Color*.

4. Click the preview image of the document (*Edit*) that you want to edit.

The document opens.

Advanced search

> 📋 Note
>
> This action is only valid for INDD and HTML templates.
> It is currently not possible to access an online template under *> Brand Template Builder> Manager*.

1. Choose *> Brand Template Builder > Manager > Documents*.

    The advanced search for documents is displayed.

2. Enter the search criteria. For more information, see *Documents* on page 163.

3. Click *Search*.

    The results are displayed in a hit list.

4. Select the document that you want to open in the *In Progress* area.

5. On the document, click > ➡ > *Edit*.

The document opens.

Searching Using Categories

> 📋 Note
>
> This action is only valid for INDD and HTML templates.
> It is currently not possible to access an online template under *> Brand Template Builder> Manager*.

Each document is assigned to at least one category. Categories are characteristics that are created in a structured way in a category tree and managed centrally by administrators. Multiple characteristics can be assigned to a document (for example, target groups and document types).

1. Choose *> Brand Template Builder > Manager > Documents > Categories*.

    The category tree is displayed.

2. Click a category.

    The assigned documents are displayed in a hit list.

3. Select the document that you want to open in the *In Progress* area.

4. On the document, click > ➡ > *Edit*.

The document opens.

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4

Editing a Docu-
ment

When editing a document, you change texts and images, specify the size, or define the document structure, for example.

> **Note**
>
> When creating the template, the designer chooses which options are available to you while editing the document. The designer may allow very different editing options, depending on the template. As a result, not all of the editing options described in this chapter are available in each document. If you have questions or cannot access editing options, contact the designer.

In the Brand Template Builder module, you can create INDD documents (based on Adobe InDesign) and – if enabled in your system – HTML documents. The ways in which INDD and HTML documents are edited differ significantly. The sections below therefore describe the document editing steps for each separately.
See *INDD Documents* on the facing page and *HTML Documents* on page 115.
The processes for refreshing the document preview and finishing or interrupting editing are described for both document types together (see *Refreshing the Document Preview* on page 133 and *Finishing or Pausing Editing* on page 134).

Where You Edit a Document

You can edit a document in the document editor. You can open a document in the document editor in the following ways:

- Create a document (see *Creating a Document* on page 15).
- Open a document that still has the status *In Progress* (see *Open* on page 23).

4.1 INDD Documents

This chapter describes the editing options for INDD documents.

> **Note**
>
> When creating the template, the designer chooses which options are available to you while editing the document. The designer may allow very different editing options, depending on the template. As a result, not all of the editing options described in this chapter are available in each document. If you have questions or cannot access editing options, contact the designer.

How You Know that You Are Editing an INDD Document

When you open an INDD document in the customizing wizard, six editing steps are displayed for you:
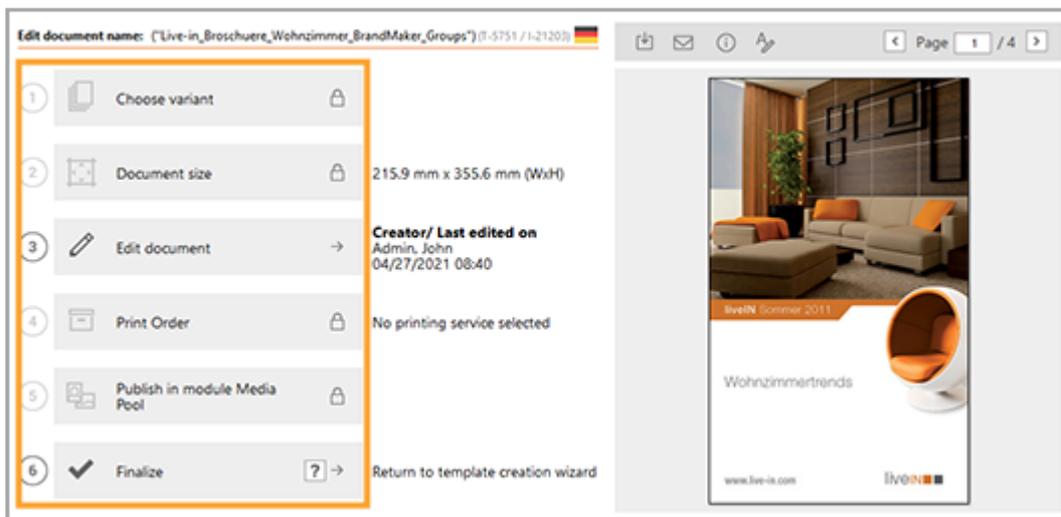
For an HTML template, four editing steps are displayed (see *HTML Documents* on page 115).
You can access the Customizing wizard when you close the document editor.

The Editing Process

- *The Document Properties* on the next page: you choose the basic document properties such as the document name, the specified locale, the branch affiliation, and the validity.

- *Variant* on page 34: If you have set up variants for a document, then you select a variant while you create the document. If necessary, you can change the variant again afterwards. The variant can affect the appearance, content, and the editing options in the document.

- *Document Size* on page 37: templates can be designed to allow you to change the document size for your document. For example, you can then create folding flyers in different sizes from one template.
  If this is available for your document, you set the document size already while creating the document. If necessary, you can change the size again afterwards.

- *Document Structure* on page 43: this section describes how to change the structure of your document if you are permitted to do so.

- *Customization* on page 51: this property is a serial letter function. With a template for mass customization, you 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.

- *Data from Data Objects* on page 53: this section describes how to integrate data from the *Marketing Data Hub* module into your document, if you are permitted to do so.

- *Texts and Images* on page 85: in this section, you learn how to edit the texts and images of the document.

- *Displaying Boxes in the Document* on page 101: the designer can allow you to transform boxes. In this section, you can learn which transformations you can use.

4.1.1   The Document Properties

Choose the basic document properties, such as the document name, the specified locale, the branch affiliation, and the validity. You must edit the document properties in the following situations and fill out the mandatory properties at minimum:

- You have created the document and you want to enter the properties but want to continue editing the document afterwards.

- You have created and possibly edited the document but cannot yet finish editing it, and you therefore have to save the document with the status *In Progress*.

- You have created and edited the document and you are finalizing the document in one work process.

- The designer has selected the editing of properties as a mandatory step. In this case, the *Edit document properties* dialog box is displayed immediately after you open the document in the customizing wizard.

Document Properties

A document has the following editable properties:

Property	Mandatory property	Description
Document name	Yes	Enter a name for the document. Possibly, the name is preset according to a defined scheme. You can change or supplement the preset values.
Affiliate ID	No	Note: visible only if the *Affiliate ID* function is used in your system. Select an ID from your assigned affiliate IDs. If no affiliate ID is set for you, the ID of the document will be set as follows: As long as the ID of the document is not set, the ID is set by the top dropdown with affiliate reference. When the user selects an entry from the dropdown, the affiliate ID of the entry is taken as the affiliate ID of the document. Note that you can use this feature to restrict the visibility of the document. If you are allowed to enter all affiliate IDs, the field supports the search: According to the input, the system searches the affiliate IDs and returns the hits. A maximum of 100 hits are displayed. If more are found, a corresponding display informs, so that you can refine the search.
Validity	No	Enter the validity of the document. Note that the validity is an access criteria.

Property	Mandatory property	Description
Locale	Yes	Assign a locale to the document. This decision may have an effect on the content and how it is displayed (for example, the display of numbers or date information).
		The document may be created in several languages. In this case, you define a primary locale and the locales #2, #3, and so on.
		Note: The number of locales to be defined may change when you insert pages or products in the document. If additional locales are created in these pages or products, the number of locales in the document properties increase accordingly. You may then need to re-edit the document properties.

Editing Properties in the Document Editor

On the *Document* tab, you edit the properties and, where necessary, the document variant and size. For information about editing the variant or document size in the document editor, see *Variant* on page 34 and *Document Size* on page 37.

Prerequisite: You have opened a document in the document editor.

1. On the *Document* tab, choose ✎ in the *Properties* area.

   The *Edit document properties* dialog box is displayed.

2. Edit the mandatory properties: enter a name and specify one or more locales of the document.

3. Optional: select an affiliate ID and define the document validity.

4. Choose *Save and Close*.

The properties are saved.

Editing the Document Properties

As well as editing in the document editor, you can also edit the document properties in the Customizing wizard.

Prerequisite: You have opened a document in the customizing wizard.

1. If the *Edit document properties* dialog box is displayed automatically, go to step 2. If the dialog box is not displayed, choose:

   a. You have created the document and you want to enter the properties but want to continue editing the document afterwards:

      ■ Choose on the right above the preview in the customizing wizard.

   b. You have created and possibly edited the document but cannot yet finish editing it, and you therefore have to save the document with the status *In Progress*.

      ■ Choose *Close document*.

   c. You have created and edited the document and you are finalizing the document in one work process:

      • Click *Finalize*.

   The *Edit document properties* dialog box is displayed.

2. Edit the mandatory properties: enter a name and specify one or more locales of the document.

3. Optional: select an affiliate ID and define the document validity.

4. Choose *Save and Close*.

The properties are saved:

• The *Edit document properties* dialog box was displayed automatically: the document remains open in the customizing wizard.

• You chose : the document remains open in the customizing wizard.

• You chose *Close document*: the document is saved with the status *In Progress*.To continue editing, see *Open* on page 23.

• You chose *Finalize*: you continue with the finalization. See *Finalization* on page 136.

Next Step

Check which of the next steps is configured for your document:

• Selecting a variant (see *Variant* on the next page)

• Defining the size of the document (see *Document Size* on page 37)

• Editing a document structure (see *Document Structure* on page 43)

- Personalizing a document (see *Customization* on page 51)

- Adding product data (see *Data from Data Objects* on page 53)

- Editing texts and images (see *Texts and Images* on page 85)

4.1.2 Variant

If you have set up variants for a document, then you select a variant while you create the document. If necessary, you can change the variant again afterwards. The variant can affect the appearance, content, and the editing options in the document.

How to Identify Whether You Can Select or Change a Variant

If you can choose variants for a document, the *Variants* option is listed in the *Setup* area of the *Document* tab in the document editor. Choose ✏ to open the dialog box where you can select or change the variant.

If a document has variables, the step 1 button in the customizing wizard is displayed as shown in the screen shot below:

The number and icon are displayed in dark gray, an arrow is displayed on the right side of the button, and the message *No variant selected yet* is displayed in red next to the variant.

If you do not need to choose a variant, the button is displayed as follows:


The number and icon are displayed in a lighter color and a lock is displayed on the right side of the button. No information text is displayed. In this case, you can continue editing the next step directly.

What Can Be Changed by Variants

When you choose a variant, you can change the following items:

- *Texts*: in a variant, the designer can change how you can edit texts within it, whether the variable is a text or date variable, and which help tools the designer provides for you. The help tools in this case are the support provided by the designer for editing a text variable (for example, a processing order for the variables, marking a variable as a mandatory field, or check functions such as a recommended text character count).

- *Images*: in a variant, the designer can change the sources from which the images can be selected, whether you can select an image section, and which help tools the designer provides you for editing the image variables. The help tools in this case are the support provided by the designer for editing the image variables (for example, a help text or a specification of whether the original image is allowed or whether you have to process the image variable as a mandatory field).

- *Colors*: in every InDesign document, there are usually elements that are used to provide a color, brand-compliant or CI-compliant design. In a color variant, you can change a color source into a target source throughout the whole document:
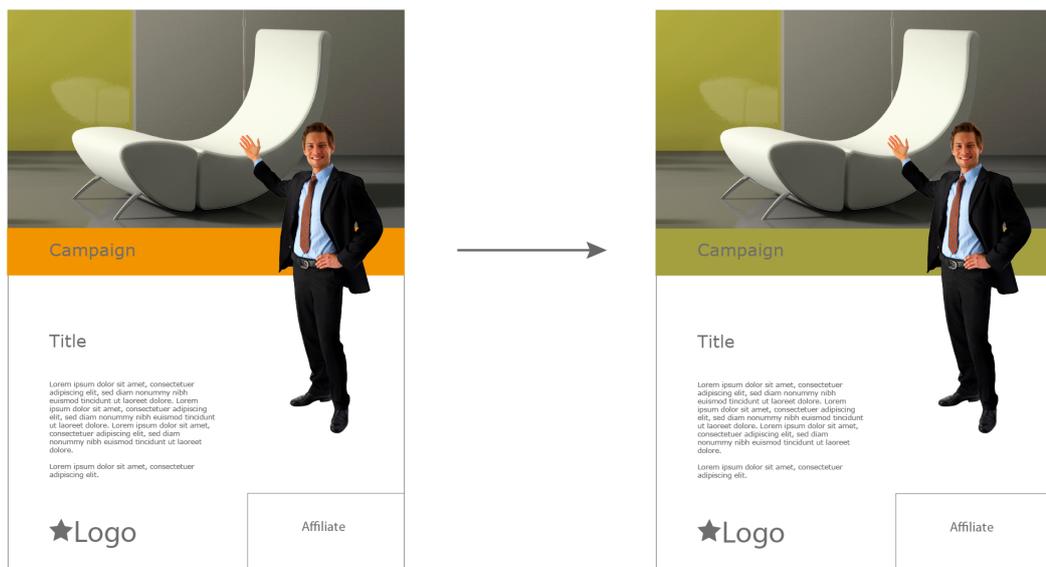
Where You Choose a Variant

You can choose a variant at three points:

- In the customizing wizard, by opening *Step 1 – Choose variant*.

If you choose step 3 *Edit Document* in the Customizing Wizard, the document editor opens. Here you can define variants in two places:

- In the *Setup* area on the *Document* tab.

- On the *Content* tab, if you want to display all editable contents of the page in the *Selected Variant* area (pencil icon)

Additional Settings

In the template, one variant can be defined as the default variant and is then preset in the picklist. If you want to define a variant as the default variant, select the variant in the selection list and then activate the checkbox *Set as default*. Note that this is not possible with all picklists.

The preview in the customizing wizard may no longer be up to date due to the selection of the variant. To display the latest preview in the customizing wizard, activate the checkbox *Update preview when saving if variant selection is no longer current*. Note that it may take some time to update the preview.

Choosing a Variant

Prerequisite: You have opened the document in the document editor.

1. On the *Document* tab, choose [pencil icon] in the *Setup* area.

   The *Choose variant* dialog box opens. At least one selection option is displayed:
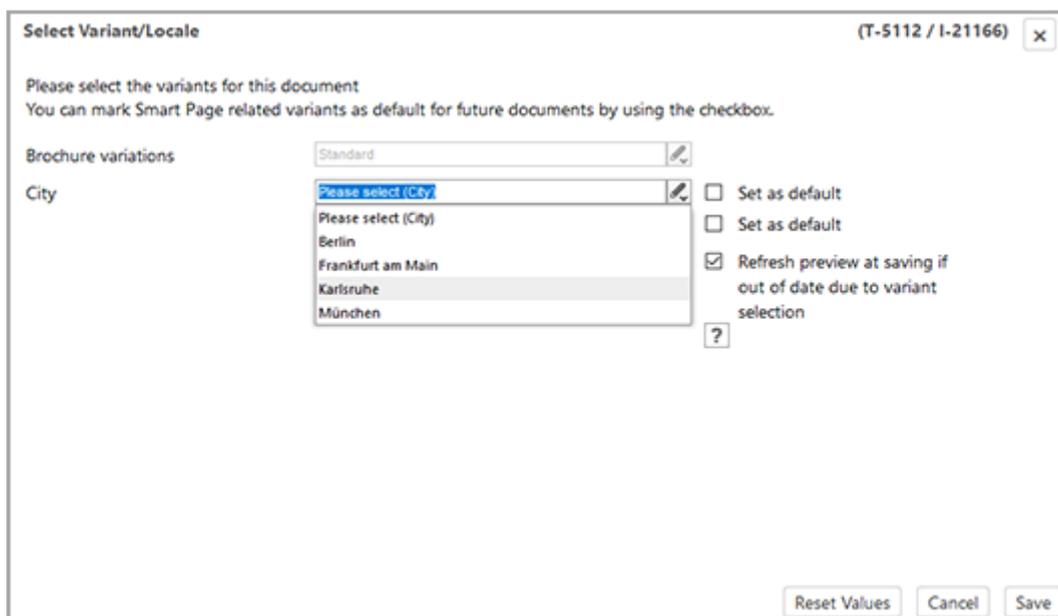
2. Choose a variant.
3. If possible: choose a variant as the default for each picklist.

4. Optional: activate the checkbox *Update preview when saving if variant selection is no longer current* if you want to update the preview immediately. Note that it may take some time to update the preview.

5. Click *Save*.

The dialog box closes. You have chosen a variant.

Next Step

Check which of the next steps is configured for your document:

- Defining the size of the document (see *Document Size* below)

- Editing a document structure (see *Document Structure* on page 43)

- Personalizing a document (see *Customization* on page 51)

- Adding product data (see *Data from Data Objects* on page 53)

- Editing texts and images (see *Texts and Images* on page 85)

4.1.3 Document Size

Templates can be designed to allow you to change the size of your document. For instance, you can create folding fliers in various sizes from one template.
If this is available for your document, you set the document size while creating the document. If necessary, you can change the size again afterwards.

How to Determine Whether You Can Change the Document Size

The resizing option is available only if the template is a single-page template that cannot be enhanced with other pages.

If you can change the size of a document, the *Size* option is listed in the *Setup* area of the *Document* tab in the document editor. Choose $\boxed{\nearrow}$ to open the *Set Document Size* dialog box.

The step 2 button in the customizing wizard is displayed as shown in the screen shot below:

The number and icon are displayed in dark gray and an arrow is displayed on the right side of the button.

If the size cannot be changed, the button is displayed as follows:

The number and icon are displayed in a lighter color and a lock is displayed on the right side of the button. In this case, you can continue editing the next step directly.

The Effects of Changing a Document Size

The designer defines how the change affects the content (text, image) and the area in which you can change the size.

Effects on Content

Content is affected in three different ways:

- *Zoom*: in this case, the size change is applied to the content (that is, you scale the document and content by the same factor:
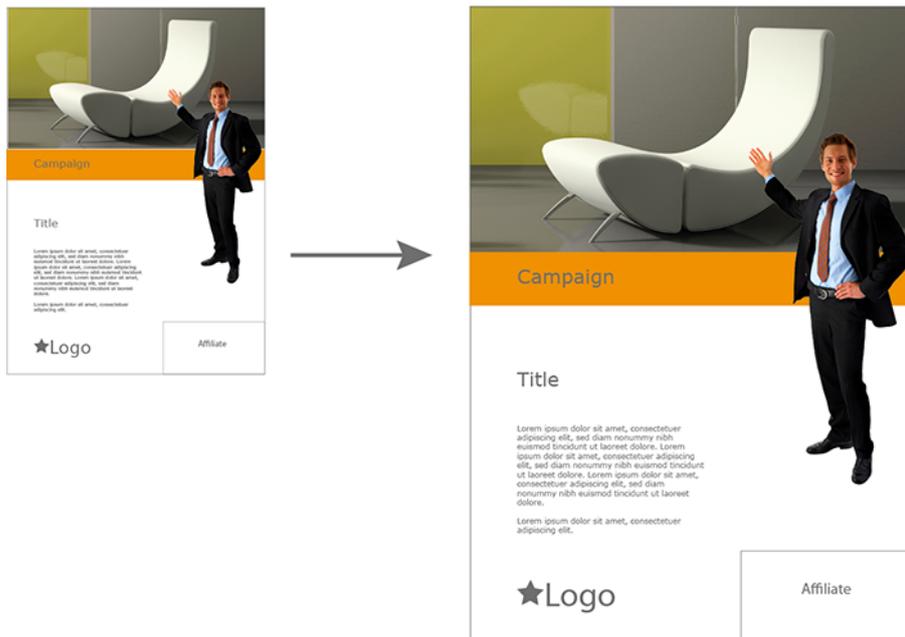
- *Scaling dimensions*: in this case, you change the dimensions of the document but do not automatically scale the content to the same extent. However, the

position, the size of text and image boxes, and the visible sections of an image can be changed:

- *Adapting height dynamically*: in this case, you change the width of the document if necessary. The height adapts to fill the text variable.

There is no difference between the first two options when you change the height. You notice the difference only after refreshing the view (see *Refreshing the Document Preview* on page 133). The designer will specify an option here that he or she thinks provides the best results for the documents.

You can see the third option in a corresponding message in the customizing wizard on the right of the *Step 2 – Document size* button:

Resizing Range

First, the designer sets a minimum and maximum width and height. This results in a scaling range. The designer also specifies whether only proportional or also non-proportional scaling is possible.

Proportional Scaling

If only proportional scaling is allowed, you can change the width and height up or down to the maximum and minimum limits but only by the same factor.

> EXAMPLE FOR PROPORTIONAL SCALING
>
> You are using a document with the original dimensions 210 x 270 mm. You want to increase the document width to 220 mm.
>
> With proportional scaling, the height is calculated automatically:

You can see whether you can only scale the document proportionally in the *Set Document Size* dialog box. If this is the case, the *Proportional scaling* checkbox is activated and grayed out, because you cannot set non-proportional scaling:

In addition, the height and width are calculated automatically if you enter the respective other value.

Non-Proportional Scaling

If non-proportional scaling is allowed, you can set the width and height up or down to the maximum and minimum limits individually. However, for example, this may lead to unsightly distortions when using the *Zoom* scaling option. The designer may therefore have restricted non-proportional scaling to an appropriate factor (for example, 10 % for vertical scaling).

EXAMPLE FOR NON-PROPORTIONAL SCALING

You have created a document that has a page with the dimensions 21 x 30 cm (width x height). Scaling is permitted up to a maximum of 25 x 36 cm. Scaling down is not possible, therefore the minimum width and height are 21 and 30 cm.

With these settings, you could scale the document to 21 x 36 cm. The designer has therefore specified a factor of 5% for vertical scaling. If you now leave the width unchanged, you can set a maximum height of 31.5 cm:

If you want to set a maximum height of 36 cm, you must set the following width at minimum:

If the height is 36 cm and this corresponds to the maximum non-proportional scaling of 105 %, the resulting proportional scaling is:

The corresponding width is therefore:

To set the maximum height of 36 cm, you must set a width of at least 24 cm when the maximum non-proportional scaling is 5%.

The *Proportional scaling* checkbox in the *Set Document Size* dialog box shows you whether you can scale non-proportionally: the checkbox is not activated when you first open the dialog box and you can edit it to limit scaling to non-proportional scaling.

The dialog box also assists you in correctly entering a scaling range that is restricted by a factor. If the height and width do not match, the number last entered is displayed in red. In addition, a hint on the right shows the range in which the value being edited can move:
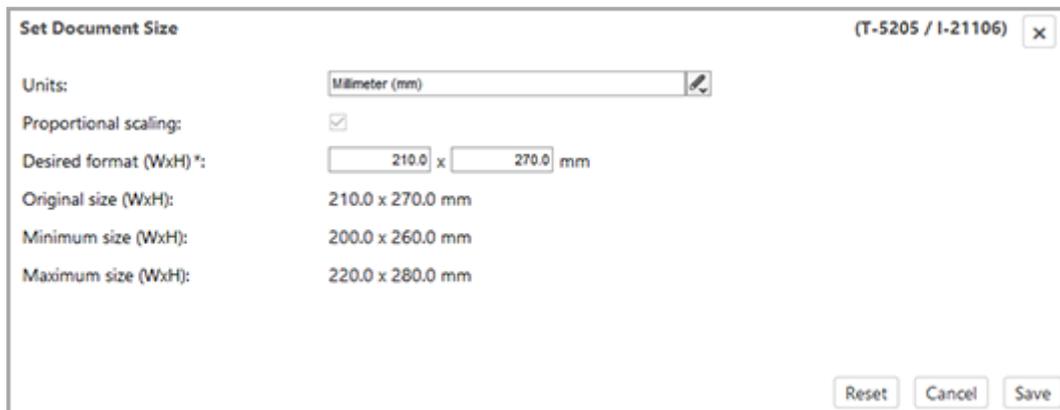
Editing the Document Size

Prerequisite: You have opened the document in the document editor.

1. On the *Document* tab, choose [pencil icon] in the *Setup* area.

    The *Set Document Size* dialog box opens.

Set Document Size		(T-5205 / I-21106)
Units:	Millimeter (mm)	
Proportional scaling:	☑	
Desired format (WxH) *:	210.0 x 270.0 mm	
Original size (WxH):	210.0 x 270.0 mm	
Minimum size (WxH):	200.0 x 260.0 mm	
Maximum size (WxH):	220.0 x 280.0 mm	
		Reset Cancel Save

2. In the *Units* picklist, select the unit of measure in which you want to change the document size.

3. If available: if you want to set a document size that is proportional to the original format, activate the *Proportional scaling* checkbox.

4. If available: if you want to use a predefined size, select the size from the *Format group* and *Format* picklist.

    Note: this list is displayed only if it contains specific sizes that can be used in the document. If you select a specific size, the dimensions are applied for the document.

5. Enter your desired format.

6. Click *Save*.

The dialog box closes and the customizing wizard is displayed again. You have defined the document size.

Next Step

Check which of the next steps is configured for your document:

- Personalizing a document (see *Customization* on page 51)

- Adding data (see *Data from Data Objects* on page 53)

- Editing texts and images (see *Texts and Images* on page 85)

4.1.4   Document Structure

This section describes how to change the structure of your document if you are permitted to do so.

How You Know that You Can Edit the Document Structure

Open the document in the document editor by clicking *Step 3 - Edit document* in the customizing wizard. The area on the right contains the *Pages* tab, which displays a preview for each page in the document.
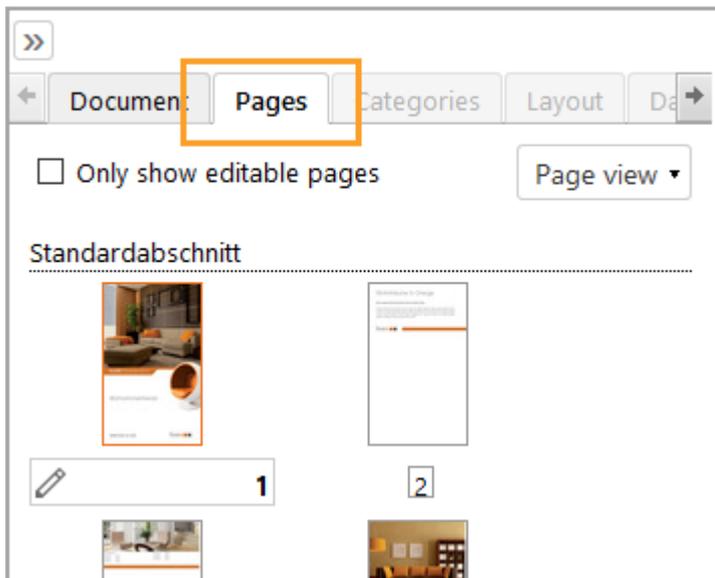
You can change the document structure in the following cases:

- One or more of the following icons are displayed below the pages. In this case, you have the following options:

Icon	Description
⊕	This adds pages (Smart Pages) to the document. The position where the pages are added depends on the settings made by the template designer.
⊗	This deletes the page from the document next to which you click the icon.
⧉	You replace the selected page with another Smart Page. Document page content that has already been edited is only retained when the page is replaced if the inserted Smart Page uses the same placeholder.

Note: note that the template configuration determines which options you can access.

- If none of the icons above are displayed, check whether you can swap pages. Move the pages using drag and drop. The following traits indicate that you can swap the pages:
  - When you move a page, a preview of the page is displayed on the cursor:

  - A status indicating whether the page can be added at the current cursor position is displayed for the preview:

Icon	Description
✅	The page can be added at this position
🚫	The page cannot be added at this position

> **Note**
>
> The ✏ icon means that there is editable content on this page. Click the icon to go to the *Content* tab, where you can edit the variables that are available on this page. The ❗ icon means that at least one piece of editable content contains an error (for example, an image with a resolution that is too low or a text box with an overflow). Activate the *Show only editable content* checkbox to hide pages that do not contain editable content in the preview.
> For more information, see *Texts and Images* on page 85.

Possible Document Structures

In addition to a page view, you can also display the document in a print preview. To do so, set the picklist at the top of the *Pages* tab to *Print view*. The pages are then displayed as follows:
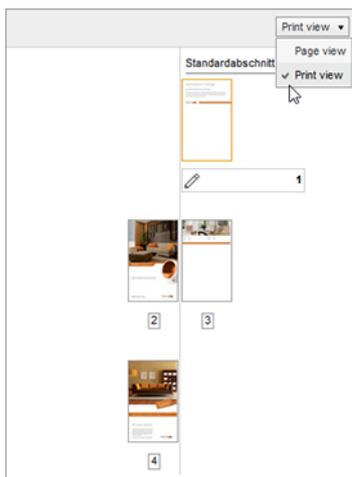
The document can also be divided into sections. Sections are separated by dotted lines on the Pages tab:
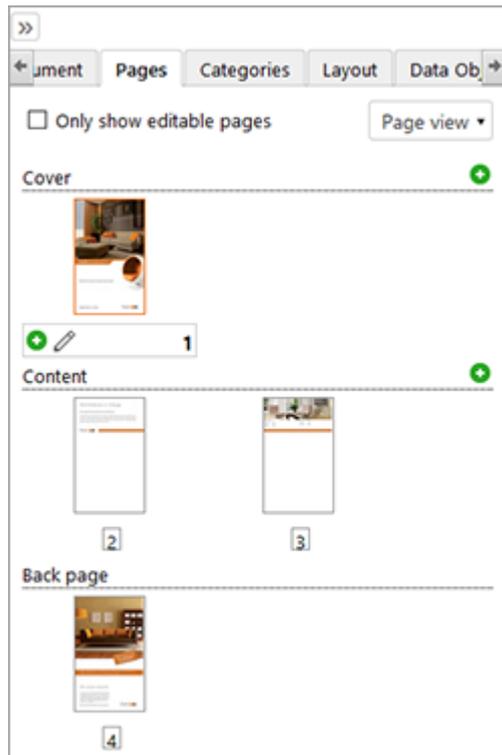
- Page view:

- Print view:

The template designer can use sections to lock parts of the document for changes, for example. In the screen shots above, for instance, the *Back page* cannot be edited. You cannot replace or delete the page or add any pages. However, the *Title* and *Content* sections can be edited. Furthermore, the template designer can configure separate limits for each section, such as a maximum or minimum number of pages or page dividers. For more information about these limits, see the section *Limits* below.

If you change the page order in a section, you can only reposition the pages within the section. You cannot move a page to a new section.

Limits

The template designer can configure page dividers and the minimum and maximum number of page numbers for the document or for sections. If necessary, a total offset can also be provided.

You can see whether your changes to the document structure are still within the limits specified by the template designer when you close the document editor. When you click *Save and Close*, Brand Template Builder checks the document structure. If there are no errors, the document editor is closed and the customizing wizard is displayed. If one or more errors are found, this is displayed in a message:
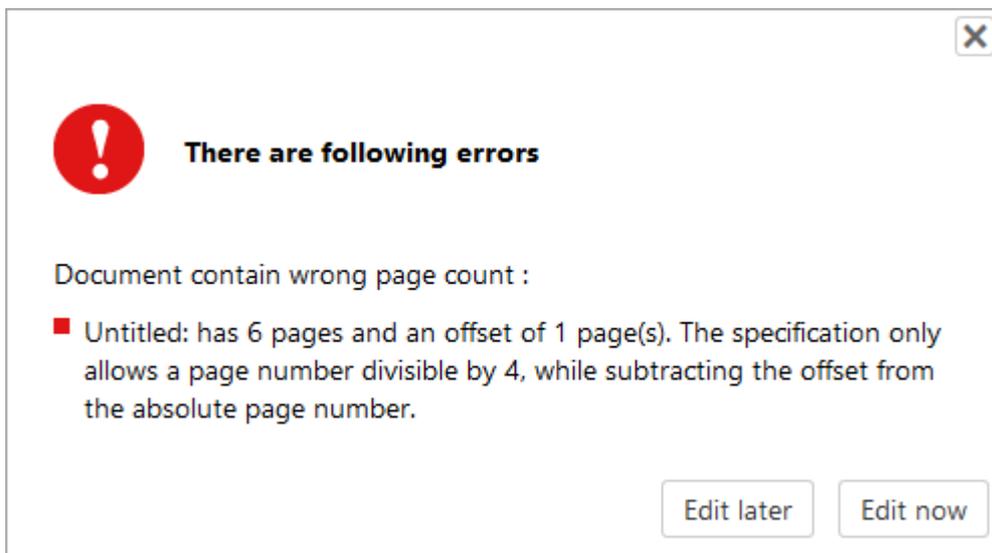
If you want to correct the errors at a later time, click *Edit later*. The document is then displayed in the customizing wizard. If you want to correct the errors immediately, click *Edit now*. Brand Template Builder then continues to display the document for you in the document editor.

Specifications for the Overall Document

In the top example in the screen shot, the template designer has specified a page divider and an offset for the overall document. This means that f must result in a whole number in the formula below:

EXAMPLE

The template designer has specified the page divider 4 and the offset 1. You create a document that has 8 pages.

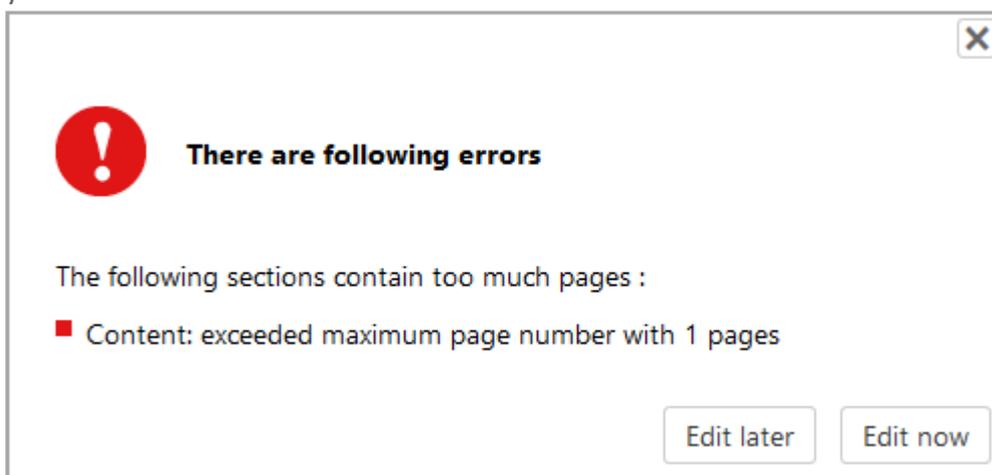In this case, an error message is displayed. You must either add another page or remove three pages:

Adding a page:

Removing three pages:

Specifications for Sections

If the template designer has made specifications for sections, this may have the following effects:

- Page dividers for section: if the template designer configures a page divider for a section, you can add only Smart Pages with an overall number of pages that can be divided into a whole number by the page divider. If, for example, the page divider 3 is specified, you can add only Smart Pages with 3, 6, 9, and so on, pages.

- Minimum and maximum number of pages for a section: in this case, the number of pages in a section must be within the specified limits. If you add or remove too many pages, a corresponding error message is displayed when you leave the document editor:

There are following errors

The following sections contain too much pages :

■ Content: exceeded maximum page number with 1 pages

Edit later   Edit now

Correct the number of pages appropriately if so.

Associated Tasks

- *Changing the Page Order* below
- *Adding a Page* below
- *Replacing a Page* on the next page
- *Deleting a Page* on the next page

Next Step

Check which of the next steps is configured for your document:

- Adding product data (see *Data from Data Objects* on page 53)
- Editing texts and images (see *Texts and Images* on page 85)

4.1.4.1 Changing the Page Order

Prerequisite: You have opened a document in the document editor. The document page order can be changed in at least one section.

1. Go to the *Pages* tab.
2. Change the position of the page that you want to add at a different point using drag and drop:
    1. Click and hold the left mouse button on the page.

       A preview of the page is displayed on the cursor.
    2. Drag the page to the desired position until the ✅ sign appears next to the page preview.
    3. Release the left mouse button.

You have changed the page order. If necessary, repeat the process to move additional pages.

4.1.4.2 Adding a Page

Prerequisite: You have opened a document in the document editor. You can add pages to the document.

1. Go to the *Pages* tab.
2. Click the ➕ icon next to the page after which you want to add additional pages.

The *Page library for template ....* dialog box is displayed. The dialog box displays the Smart Pages that you can add to the document.

3. Choose a page and activate the checkbox in its bottom right corner.

4. Click *Save*.

    If the size of the page does not match the page dimensions of the document: the Select Page Size dialog box is displayed.

    1. From the picklist, choose whether you want the pages to retain their size or whether you want the pages to be adapted to the dimensions of the document.

    2. Choose *OK*.

The page or pages are added.

4.1.4.3   Replacing a Page

Prerequisite: You have opened a document in the document editor. You are able to replace pages in the document.

1. Go to the *Pages* tab.

2. Click the ⊞ icon next to the page after which you want to replace a page.

    The *Page library for template ....* dialog box opens. The dialog box shows the Smart Pages that you can add to the document.

3. Choose a page and activate the checkbox in its bottom right corner.

4. Click *Save*.

The page is replaced by the selected page(s).

4.1.4.4   Deleting a Page

Prerequisite: You have opened a document in the document editor. You are able to delete pages in the document.

Attention

You cannot reverse the deletion of pages. Edited content is lost and cannot be restored.

---

1. Go to the *Pages* tab.

2. Click the ❌ icon next to the page that you want to delete.

3. A prompt opens that queries whether you really want to delete the page.

4. Click Yes.

The page and all the content are deleted.

4.1.5 Customization

This property is a serial letter function. With a template for mass customization, you can create multiple pages in which the variable components are filled with data from an Excel file in XLSX format. Typical use cases include address data for a letter or personal data for a business card.
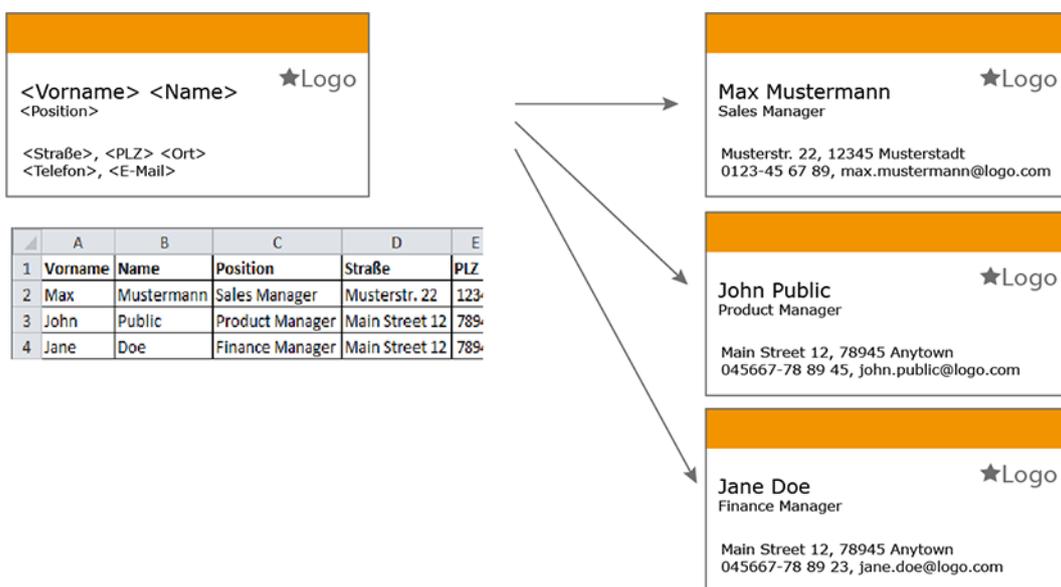
How You Know that You Can Carry out Customization

The *Customize* button is displayed in the document editor:
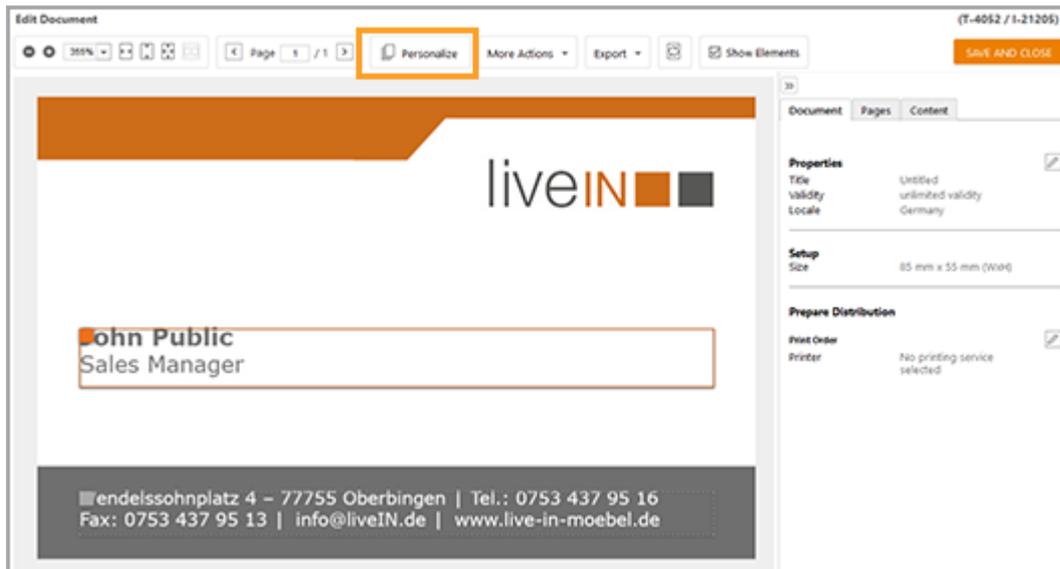
Customization

Prerequisite: You have opened the document in the document editor.

1. Choose > *Customize*.

   The *Mass customization* dialog box opens.

2. Optional: if you have not filled the required fields in an Excel file:

   1. Click *Download*.

      This downloads an Excel file with a name based on the template. In the Excel sheet, the column names already correspond to the variables created in the template.

   2. Fill the Excel file with the necessary information and save the file.

      Note: you do not need to fill out all the columns in the Excel sheet and fill the placeholders with data from the table in this way. When the columns are empty or deleted from the table, no values are entered into the document. The empty placeholders are not deleted from the document. If necessary, you can fill the placeholders manually.

   3. In Brand Template Builder, go back to the *Mass customization* dialog box.

3. Click *Browse* and select the Excel file with the required information. Note that the file format must be XLSX.

4. Choose *Open*.

5. In the *Mass customization* dialog box, click *Save*.

The data is saved and multiple data records are created according to the specifications. Refresh the preview for all the pages so that you can check the specifications. The *Selected data record* picklist on the *Content* tab shows you which data on the current page is adopted from the table. The data records used are displayed separated by commas.

Next Step

Check which of the next steps is configured for your document:

- Adding product data (see *Data from Data Objects* below)

4.1.6   Data from Data Objects

This section describes how to integrate product data from the *Marketing Data Hub* module into your document, if you are permitted to do so.

How You Know that You Can Add Data

If you can add data, the *Categories, Layout,* or *Data Objects* tabs are displayed in the document editor. Note that the display is page-dependent: the tabs are accessible only if data can be added on the selected page.
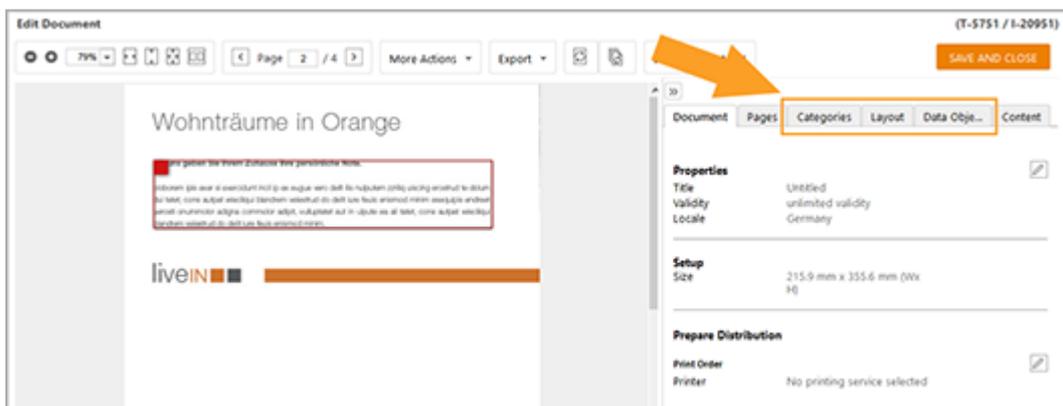
**How it Works**

If you can add data, the *Marketing Data Hub* module is enabled in your BrandMaker system. In this module, you create "types" as templates for similar data objects. If a data object is mapped in Marketing Data Hub, the creator chooses a type as the template. Data objects of the same type therefore have the same properties, but the values are different.
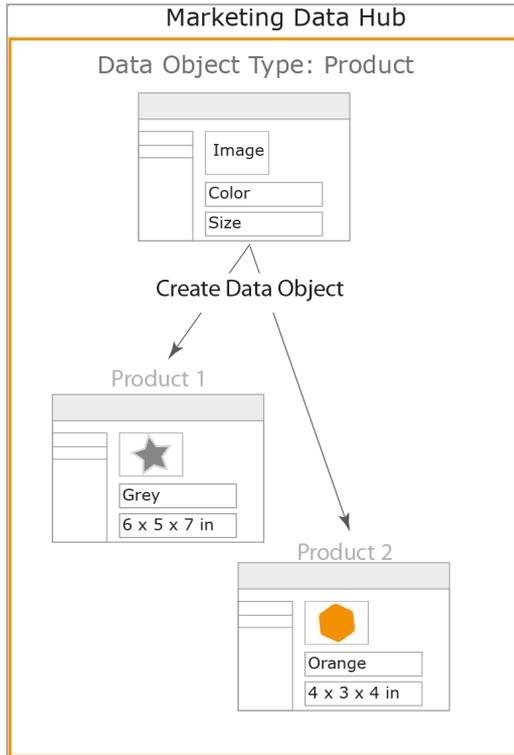
When creating a layout, the template designer connects the layout fields with the fields that the type supplies. Examples include the product description, material, size, or a product image:
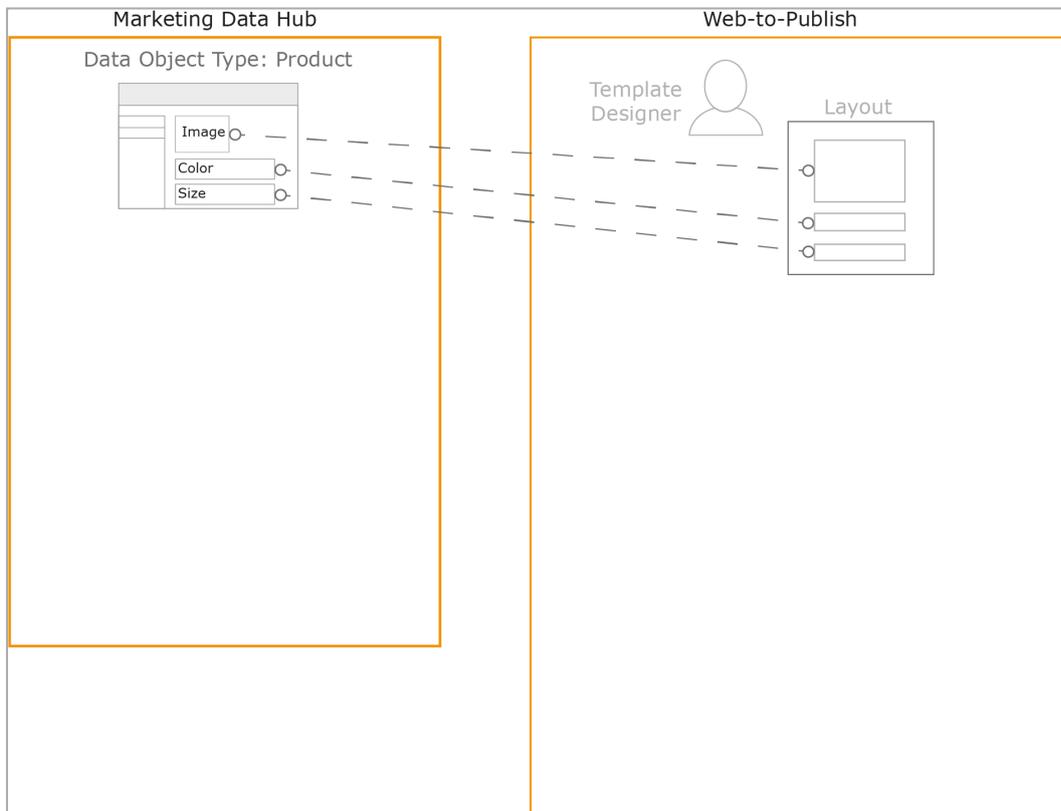
When you as the template designer create a document to which data can be added, you can assign the layout to the document in a suitable grid:
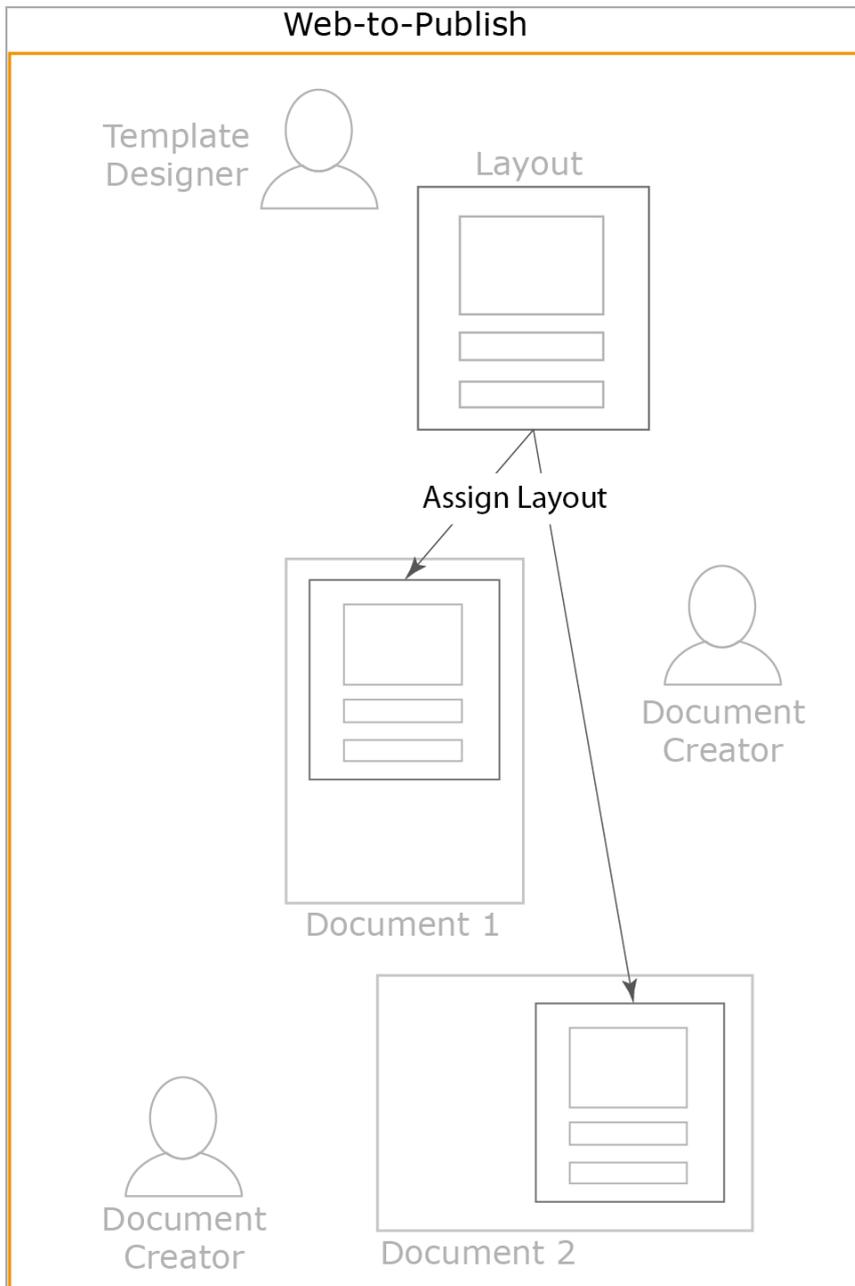
If you then assign a data object, e.g. a product, the layout fields are filled with the values of the data object:

Your document now contains the data.

> **Note**
>
> The process for you as the document creator also includes assigning a category. For more information, see the *Process* section below. In this step, the data objects from which you can choose for the assignment are restricted and/or sorted beforehand.

Effect of the Locale

Data objects can be localized to locales in Marketing Data Hub. This means that the data can have different values for each created locale. An example of this is the price, which changes depending on the different national tax rates.

The template designer has two options for integrating localized data:

- The template designer links a variable to your document locale. If you assign the locale *Germany* to your document, the price of the product in Germany is then used. If you assign the locale *Austria* to the document, the price in Austria is used.

- The template designer links a variable to the value for your locale. Using the price as an example, this means that the price of one locale (for example, *Germany*) is always used in the document, even if your document is assigned to a different locale.

Note that both variants can be used in one layout. If the locale of a variable differs from the locale of the document, the flag of the deviating locale is displayed next to the variable.
In any event, BrandMaker recommends that you specify the document locale before you assign a data object.

Process

To add data object, note the following process:

You use data by adding Smart Groups as layouts. Smart Groups are templates that are linked with data and that determine how it is placed in the document. If you want to add Smart Groups, the document must contain *Grids* on the facing page that are available as placeholders. Either the template designer creates static grids in the template or you create dynamic grids in the document. First, check which variant is available in your document.

Assign the following to the grids:

- *Categories* on page 67: The designer of the template decides whether you must first select a category that is also assigned to the data object, e.g. a specific product group. If you have to select a category, you will not see any suitable layouts on the Layout tab or on the Content tab for the variable that represents the Smart Grid.

- *Layout* on page 71: in this step, you choose the layout with which the document is added. The layout determines which product data is added to your document and how the data is positioned. You select the layout either on the *Layout* tab or on the *Content* tab when you display the smart grid variable. Note the chapter *Texts and Images* on page 85.

- *Data Object* on page 79: in the last step, you specify the data object that you want to display in the grid. You select the data object either on the *Data Object* tab or on the *Content* tab when you display the Smart Grid variable. Note the chapter *Texts and Images* on page 85.

Note that the *Categories* and *Layout* steps are interchangeable. The template designer may have preassigned or even preset the categories and layouts so that they cannot be edited.

Next Step

In the next step, you edit the texts and images (see *Texts and Images* on page 85).

4.1.6.1 Grids

You use product data by adding Smart Groups as layouts. Smart Groups are templates that are linked with product data and that determine how it is placed in the document. If you want to add Smart Groups, the document must contain grids that are available as placeholders. Either the template designer creates static grids in the template or you create dynamic grids in the document.

**How You Know if A Document Contains Static Grids or if You Have to Create Dynamic Grids**

Go to a page on which the *Categories*, *Layout*, and *Products* tabs are displayed. Go to the *Layout* tab.

- *Static grids are available*: the page displays boxes with a gray X. These boxes are static grids. In addition, the *Layout* tab directly displays suggestions for suitable Smart Groups that you can add:
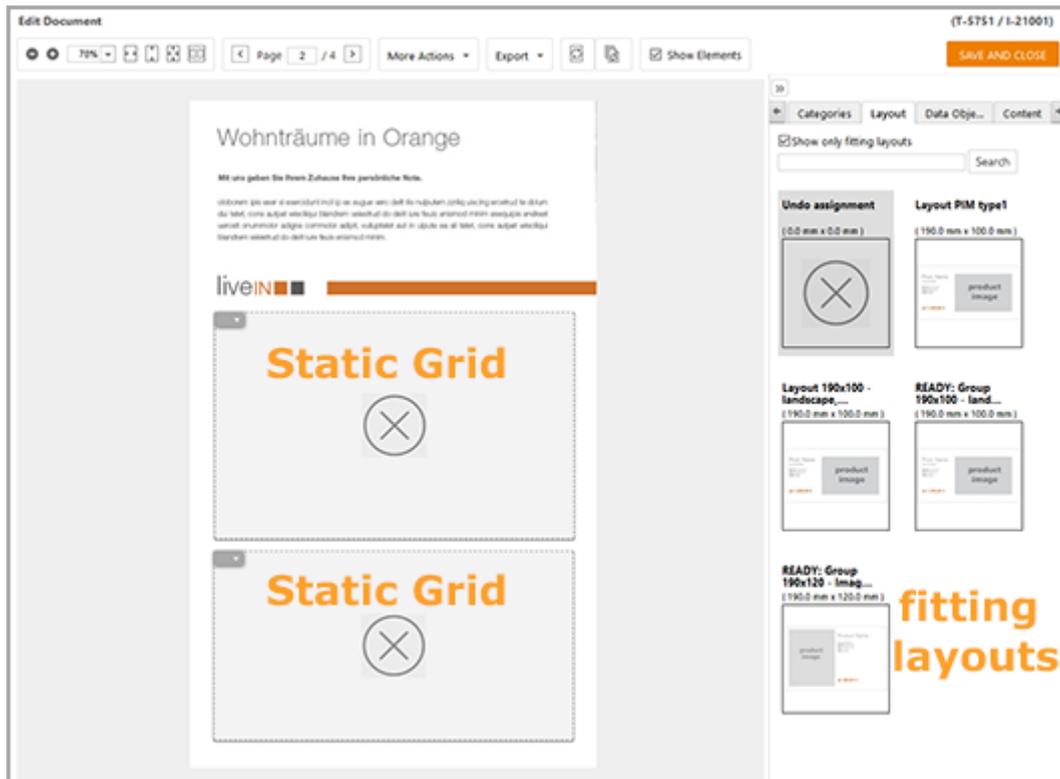
In this case, go directly to the step *Categories* on .

- *You must create dynamic grids*: the page displays the red document grid, either on the whole page or part of it. You need the document grid to create dynamic grids. In addition, the *Layout* tab does not display any suggestions for suitable Smart Groups that you can add:
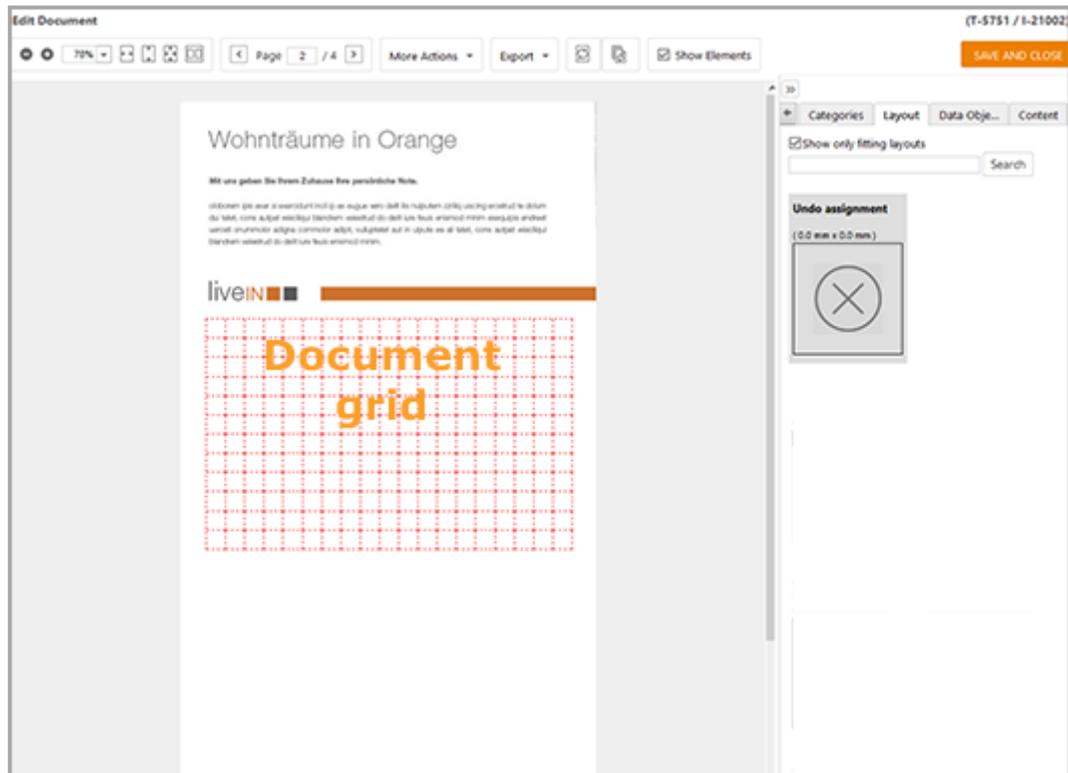
Here, you create the dynamic grids first before you go to the step *Categories*. Note that with multi-page documents, the template designer may have locked pages to prevent the creation of dynamic grids. In this case, you can see the *Layout* tab with the orange X but cannot see the document grid.

Dynamic Grids

To add a dynamic grid to your document, you need the document grid. You can change the default display of the grid (see *Changing a Document Grid* on the next page). Note that the template designer specifies the area in which you can change the document grid. You can switch the document grid on or off in the document editor under *> More Actions > Settings > Show Document Grid*.

You then use the document grid to create the dynamic grid (see *Creating a Dynamic Grid* on page 61). The document editor interface assists you in doing so. Note that you can also create dynamic image boxes in this way. You can use dynamic image boxes to add additional images.

If the document grid is restricted to one area of the page, the template designer can configure customizations with transformations, frame options, or size changes for the area in the same way as for a box. The added dynamic grids change according to their position but their size remains the same. If the insertion area is made so

small that a dynamic grid can no longer fully fit within it, the grid is removed. A corresponding warning is displayed for you when adding a Smart Group to the dynamic grid.

Associated Tasks

- *Changing a Document Grid* below
- *Creating a Dynamic Grid* on the facing page
- *Moving a Dynamic Grid* on page 63
- *Deleting a Dynamic Grid* on page 64
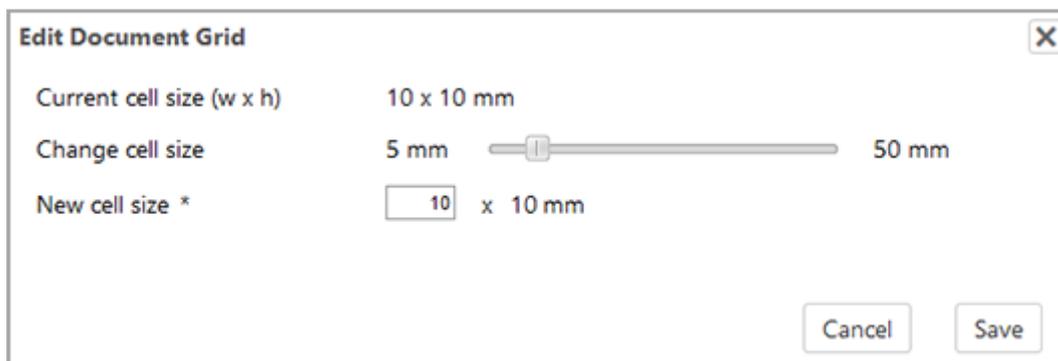- *Adding a Dynamic Image Box* on page 65

Next Step

You can now continue with the assignment of *Categories* on page 67.

4.1.6.1.1 Changing a Document Grid

Prerequisite: You have opened a document to which you can add dynamic grids in the document editor.

1. Choose *More Actions > Edit document grid*.

   The following dialog box is displayed:

Edit Document Grid			
Current cell size (w x h)	10 x 10 mm		
Change cell size	5 mm	⊢─[]─────────┤	50 mm
New cell size *	10	x 10 mm	
		Cancel	Save

   The dialog box shows the current size of the grid squares.

2. Choose:

   - Move the slider to the appropriate size.

     or

   - Enter your required grid size directly in the *New cell size* field.

3. Choose *Save and Close*.

You have changed the document grid.

4.1.6.1.2 Creating a Dynamic Grid

Prerequisites: You are in the document editor and have opened a document in which you can create dynamic grids. If necessary, you have changed the document grid (see *Changing a Document Grid* on the previous page)

1. Choose the page on which you want to add the dynamic grid.
2. Go to the *Layout* tab.

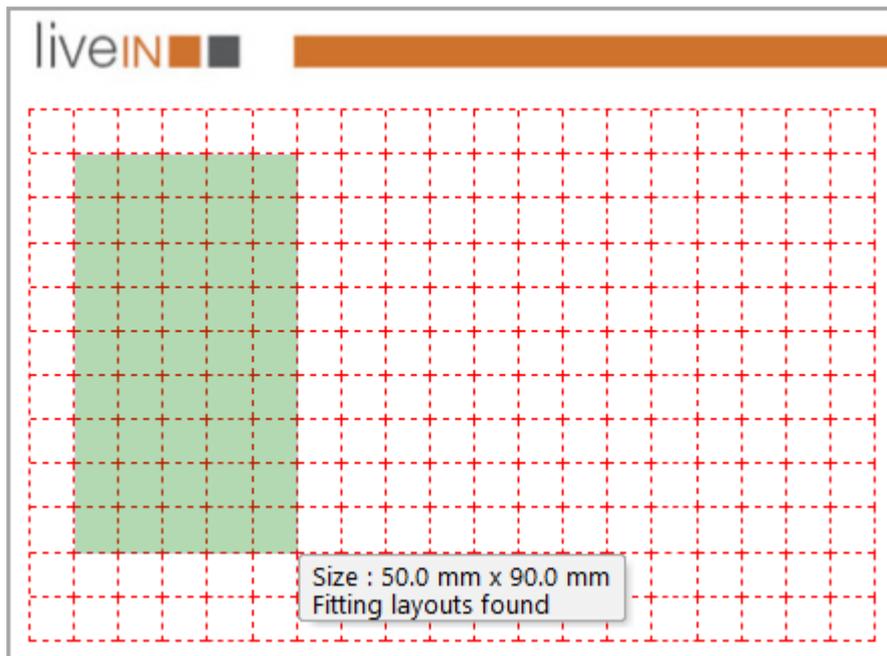   The page is displayed with the document grid.

3. If the document grid is not displayed, choose > *More Actions > Settings > Show Document Grid*.

4. Position the cursor at the point on the page where you want the top left corner of the dynamic grid to be.

5. Click and hold the left mouse button. Hold the mouse button and drag the cursor toward where you intend the bottom right corner of your dynamic grid to be.

   A red rectangle appears in the document grid:
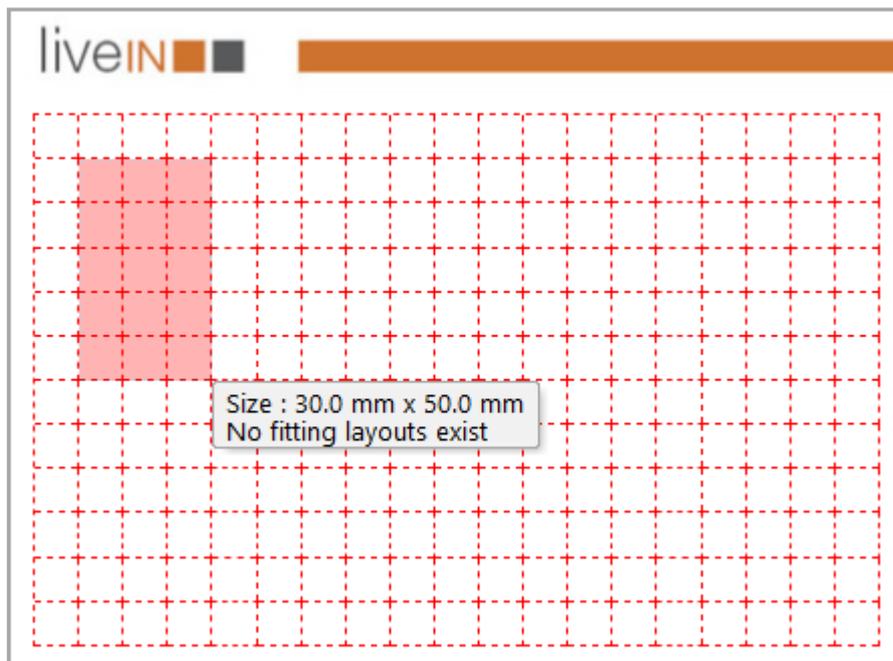
6. Drag the rectangle to the required size by clicking and holding the mouse.

   As soon as the system determines that the new size is large enough to fit an existing Smart Group, the rectangle turns green:

Note: to add a layout to a dynamic grid, the layout must fit fully into the grid when it is added in the top left corner.
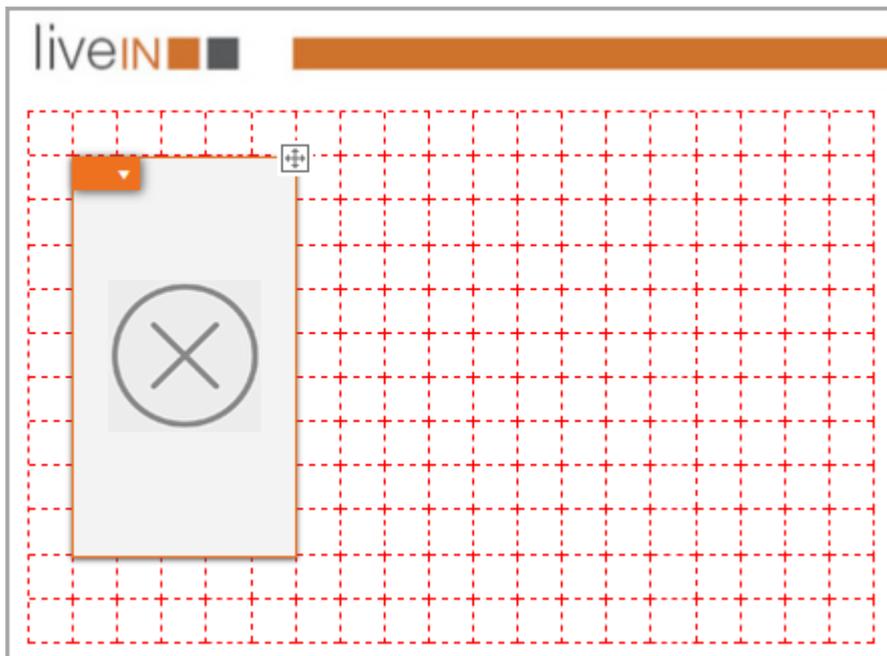
7. Release the mouse button.

The *Create...* dialog box is displayed:
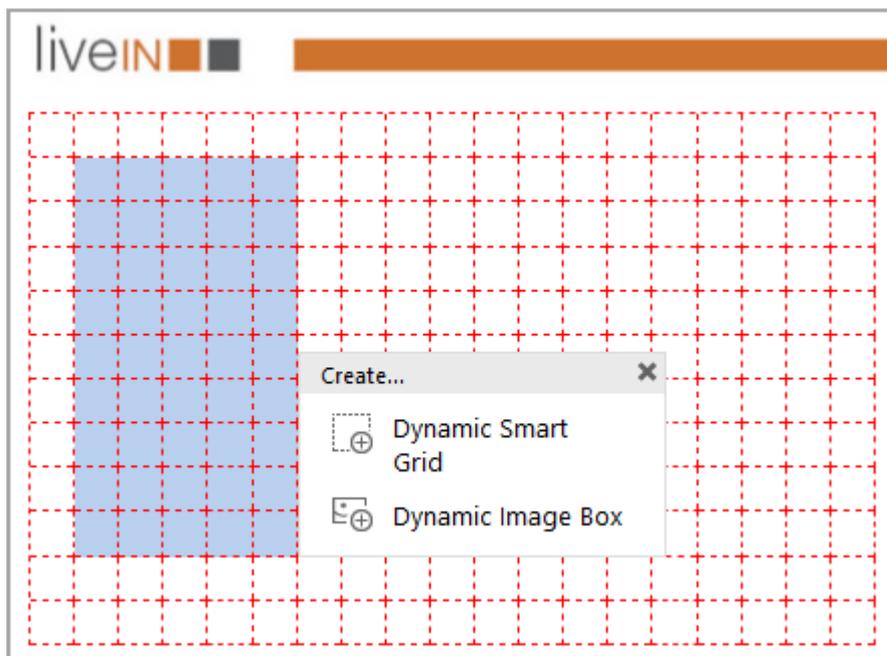
8. Choose *Dynamic Smart Grid*.

The dynamic grid is created:

The *Layout* tab displays suggestions for matching Smart Groups.

4.1.6.1.3 Moving a Dynamic Grid

If you want to change the position of a dynamic grid, you can move the grid:

Prerequisite: You have created a dynamic grid.

1. Choose the page on which the dynamic grid is added.

2. Go to the *Layout* tab.

   The page is displayed with the document grid.

3. If the document grid is not displayed, choose *> More Actions > Settings > Show Document Grid*.

4. Position the cursor on the character ⊞. The character is displayed in the top right corner of the grid.

5. Press and hold the left mouse button.

6. Move the grid.

   When you move the grid, the green placeholder moves initially:

The placeholder turns red if you position the grid on another grid or outside the allowed area:

7. Move the grid to the desired position. You can position it there only if the placeholder is green.

8. Release the mouse button.

The grid is moved to the new position.

4.1.6.1.4 Deleting a Dynamic Grid

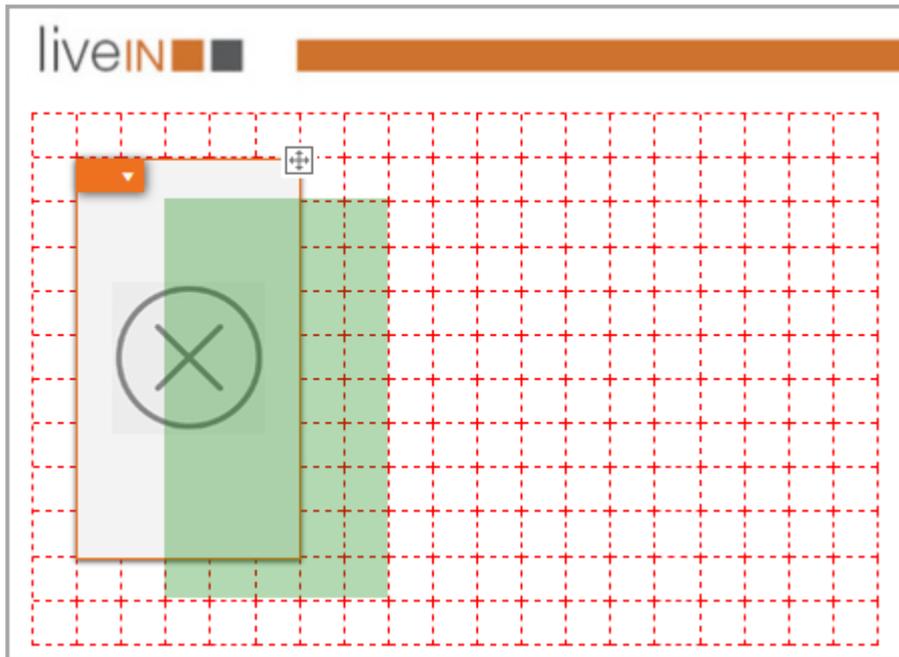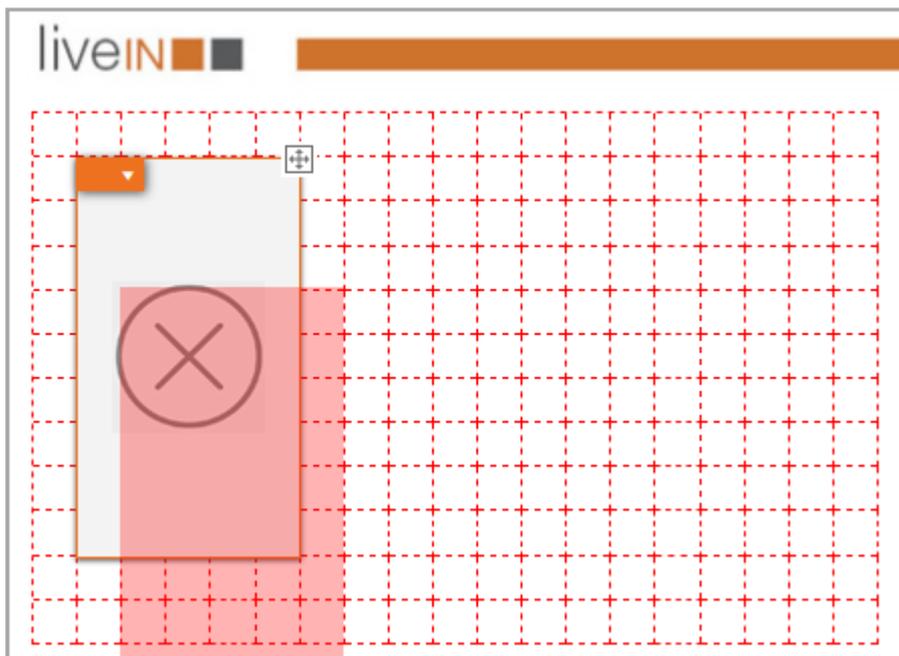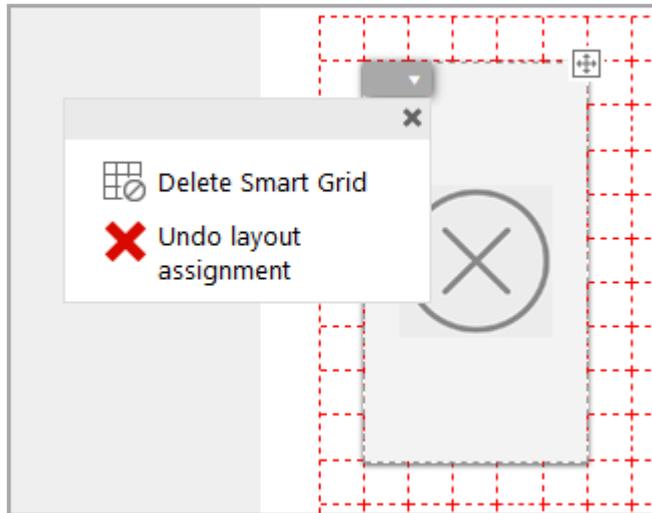If you no longer require a dynamic grid, delete the grid.

Prerequisite: You have created a dynamic grid.

1. Choose the page on which the dynamic grid is added.

2. Go to the *Layout* tab.

   The page is displayed with the Smart Grid.

3. On the dynamic grid object handle, open the context menu:

4. Choose *Delete Smart Grid*.

   A confirmation prompt is displayed.

5. Click *Yes*.

The dynamic grid is deleted.

4.1.6.1.5 Adding a Dynamic Image Box

Prerequisites: You are in the document editor and have opened a document in which you can create dynamic grids. If necessary, you have changed the document grid (see *Changing a Document Grid* on page 60)

1. Choose the page on which you want to add the dynamic image box.

2. Go to the *Layout* tab.

   The page is displayed with the document grid.

3. If the document grid is not displayed, choose > *More Actions > Settings > Show Document Grid*.

4. Position the cursor at the point on the page where you want the top left corner of the dynamic image box to be.

5. Click and hold the left mouse button. Hold the mouse button and drag the cursor toward where you intend the bottom right corner of your dynamic image box to be.

A red rectangle appears in the document grid:
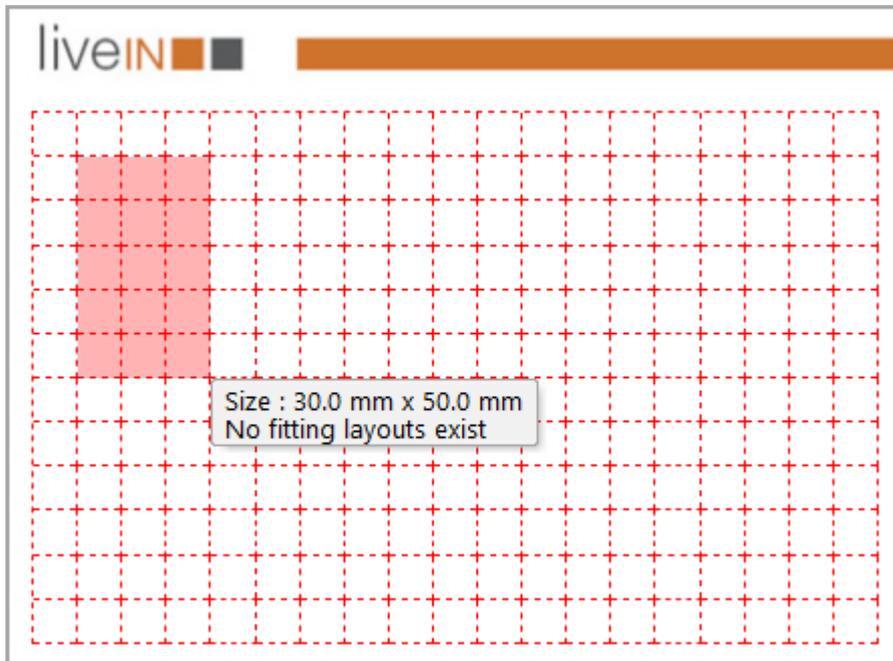
6. Drag the rectangle to the required size by clicking and holding the mouse.
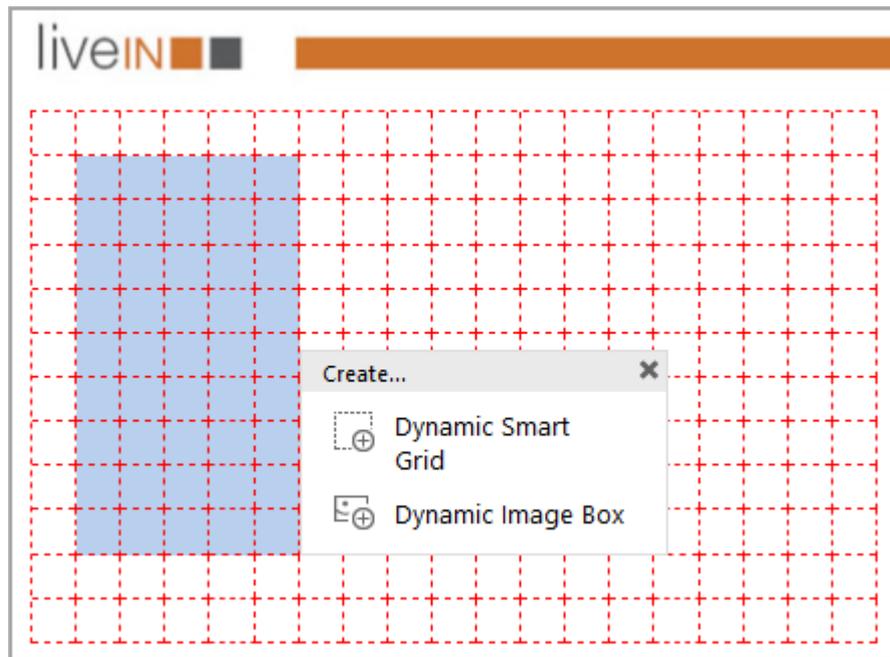
Note: note that the rectangle does not have to turn green for a dynamic image box.

7. Release the mouse button.

8. If Smart Groups also fit into the grid:

   The *Create...* dialog box is displayed:

1. Choose *Dynamic Image Box*.

   The *Search* dialog box is displayed.

9. Search for an image in the Media Pool.

10. Click the plus sign on the image that you want to add.

The dynamic image box is created and the selected image is added.

4.1.6.2 Categories

Before you insert data objects into your document, you need to narrow down the selection of data objects. To do so, a category must be assigned to each grid. The template designer may have preassigned the categories. If the *Categories* tab is visible, you can change the preassignment. If the *Categories* tab is not visible, you can only assign data objects with the preassigned category.

Associated Tasks

- *Assigning a Category* on the next page
- *Deleting a Category Assignment* on page 70

Next Step

In the next step, you assign a *Layout* on page 71 to each grid.

4.1.6.2.1 Assigning a Category

Prerequisite: You have opened a document in the document editor. The document contains either static or dynamic grids.

1. Choose the page on which you want to assign categories to the grids.

2. Go to the *Categories* tab.

   The tab displays an image for each category that can be assigned:
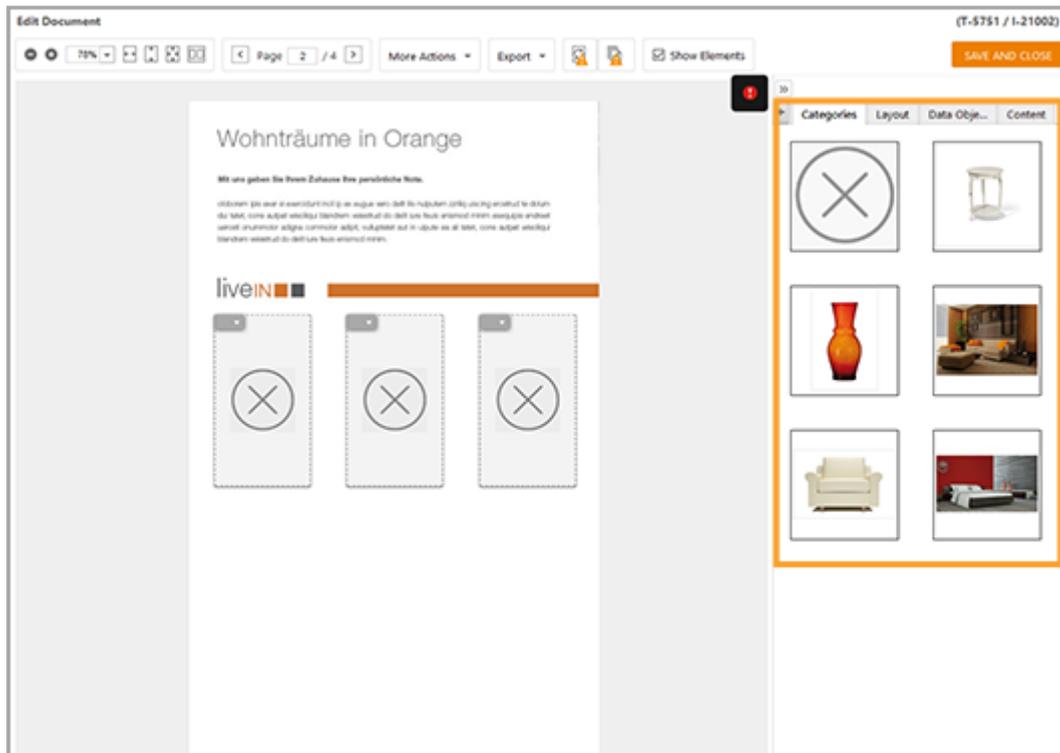
3. Drag a category onto a grid using drag and drop.

   This moves a placeholder image. A red "prohibited" sign is displayed until you have placed the cursor on a grid:

Once you place the cursor on a grid and can release the button, a green check-mark is displayed:
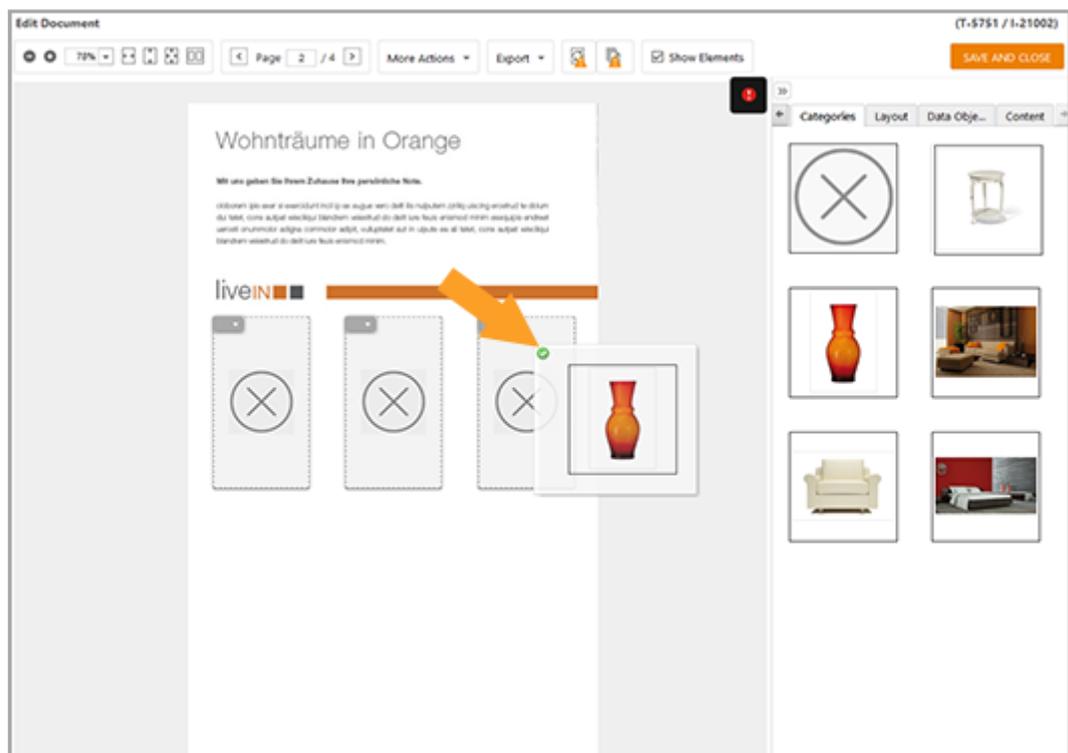
You have assigned a category to the grid. The image for the category is displayed in the grid:
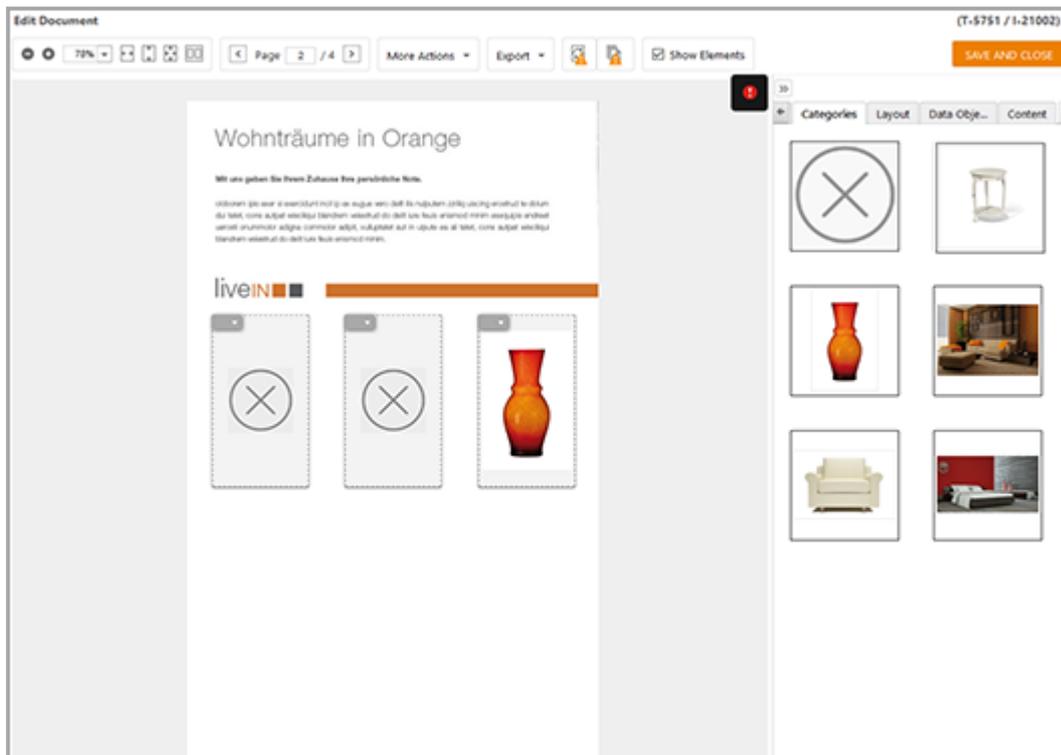
> **Note**
>
> To assign a category to all the empty grids simultaneously, double-click a category.

4.1.6.2.2 Deleting a Category Assignment

Prerequisite: You have opened a document in the document editor. The document contains either static or dynamic grids and a category is assigned to at least one of the grids.
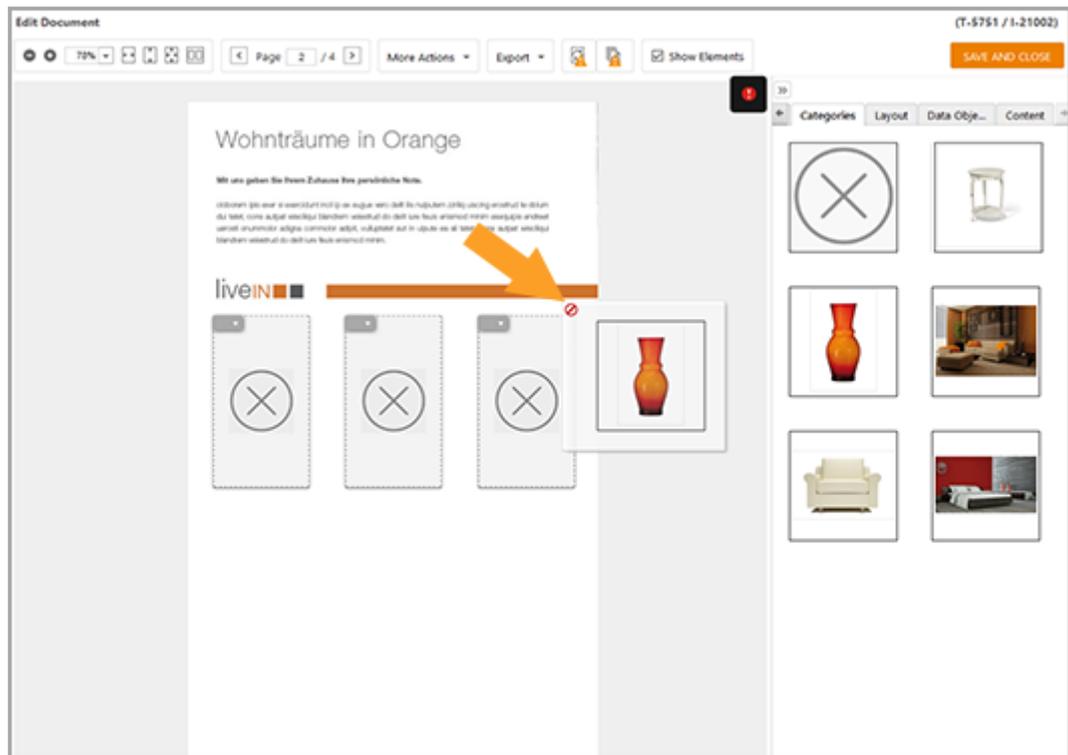
1. Choose the page on which you want to delete the category assignment.
2. Go to the *Categories* tab.
3. Choose:
    1. Open the context menu for the grid.
    2. Choose *Delete category assignment*.

or
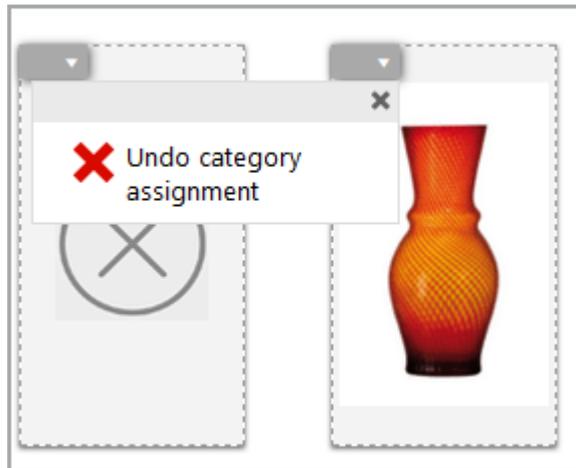
1. Drag the gray X to the grid using drag and drop.

You have deleted the category assignment. The grid is displayed without an image.

4.1.6.3 Layout

In this step, you choose the layout with which the data is added. The layout determines which data is added to your document and how the data is positioned. The template designer may have preassigned the layout. If the *Layout* tab is visible, you can change the preassignment. If the *Layout* tab is not visible, you must use the preassigned layout.

Associated Tasks

- *Searching for a Layout* below

- *Assigning a Layout* on page 73

- *Deleting a Layout Assignment* on page 78

Next Step

In the last step, you specify the *Data Object* on page 79 that you want to display in the grid.

4.1.6.3.1 Searching for a Layout

Where to search for layouts

You search for layouts in two places:

- On the *Layout* tab

- On the *Content* tab, when you select the variable of the smart grid . Click the pencil icon. The *Select Layout* dialog box appears, where you can also search for layouts.

Displayed Layouts

The layouts displayed on the *Layout* tab are determined by the *Show only fitting layouts* checkbox:

- Checkbox is deactivated: all of the layouts that are valid for the template are displayed.

- Checkbox is activated: if a Smart Grid is also selected at the same time, all of the layouts that are suitable for this Smart Grid are displayed. If no Smart Grid is selected, all of the layouts that are suitable for at least one of the existing Smart Grids are displayed.

If you want to add a layout 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.

Further Restricting a Selection

If a very large number of layouts are displayed, you can further restrict the selection by entering a keyword in the search line on the *Layout* tab. If you then perform the search, only matching layouts that contain the keyword in their properties (for example, in their name) are displayed:
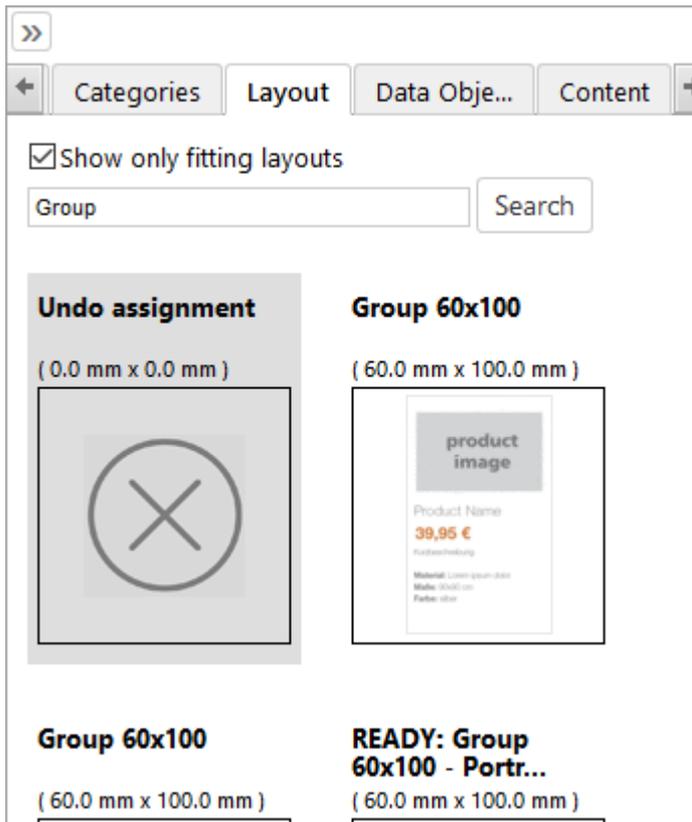
Expanding the Selection

If you cannot find a suitable layout, you can deactivate the *Show only fitting layouts* checkbox. All the layouts are then displayed. Note that you cannot add layouts whose dimensions do not fit into the grid. However, you can adapt the size of dynamic grids and then choose a different layout.

Combination

Naturally, you can also deactivate the *Show only fitting layouts* checkbox and perform a search. In this case, you search through all the available layouts whose properties contain the keyword.

4.1.6.3.2 Assigning a Layout

Prerequisites: You have opened a document that contains grids in the document editor.

On the *Layout* tab

1. Choose the page on which you want to assign layouts to the grids.

2. Go to the *Layout* tab.

The *Layout* tab displays the suitable layouts.

3. If necessary, search for suitable layouts (see *Searching for a Layout* on):

4. Drag a suitable layout onto a grid using drag and drop.

This moves a placeholder image. A red "prohibited" sign is displayed until you have placed the cursor on a grid:
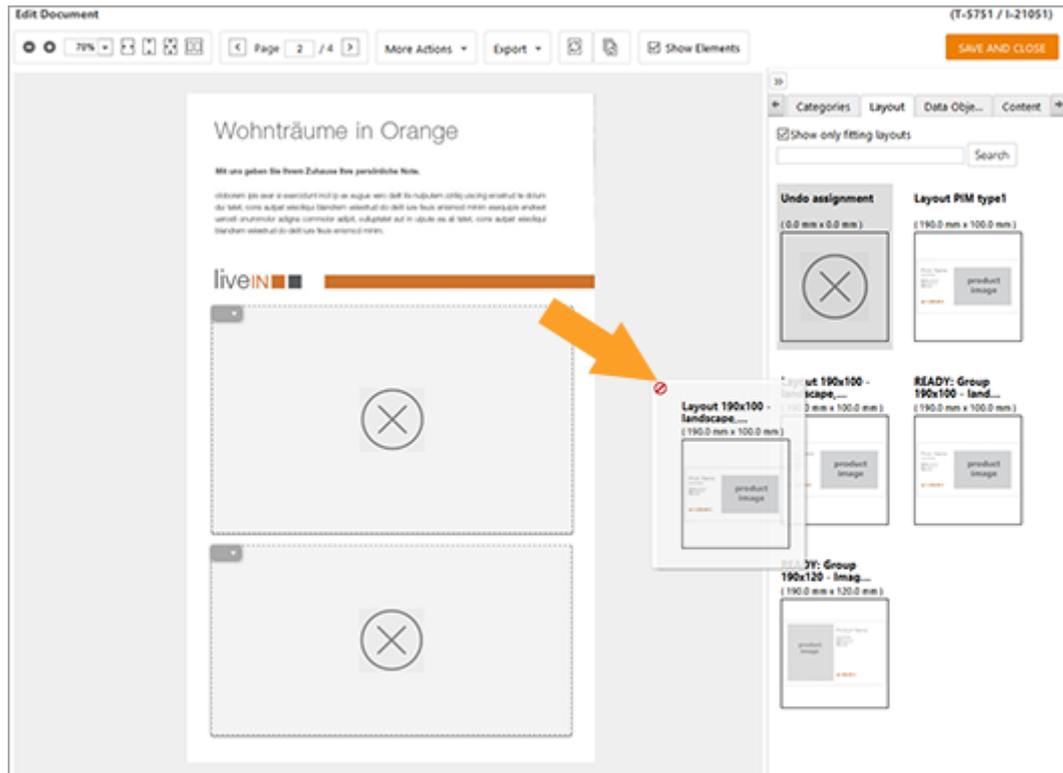
If the layout does not fit into the grid on which you place the cursor, this is also displayed with a warning:
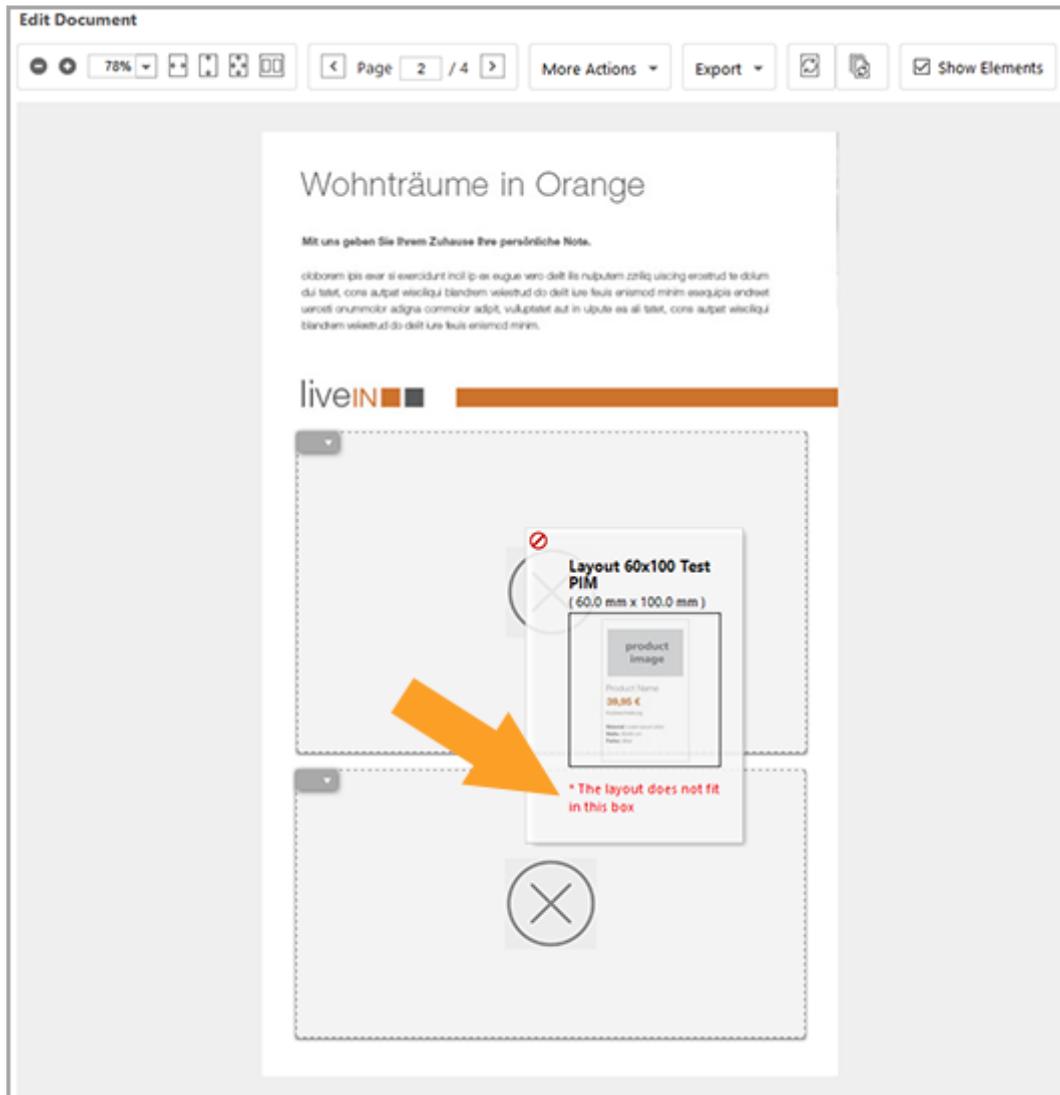
Once you place the cursor on a suitable grid and can release the button, a green checkmark is displayed:
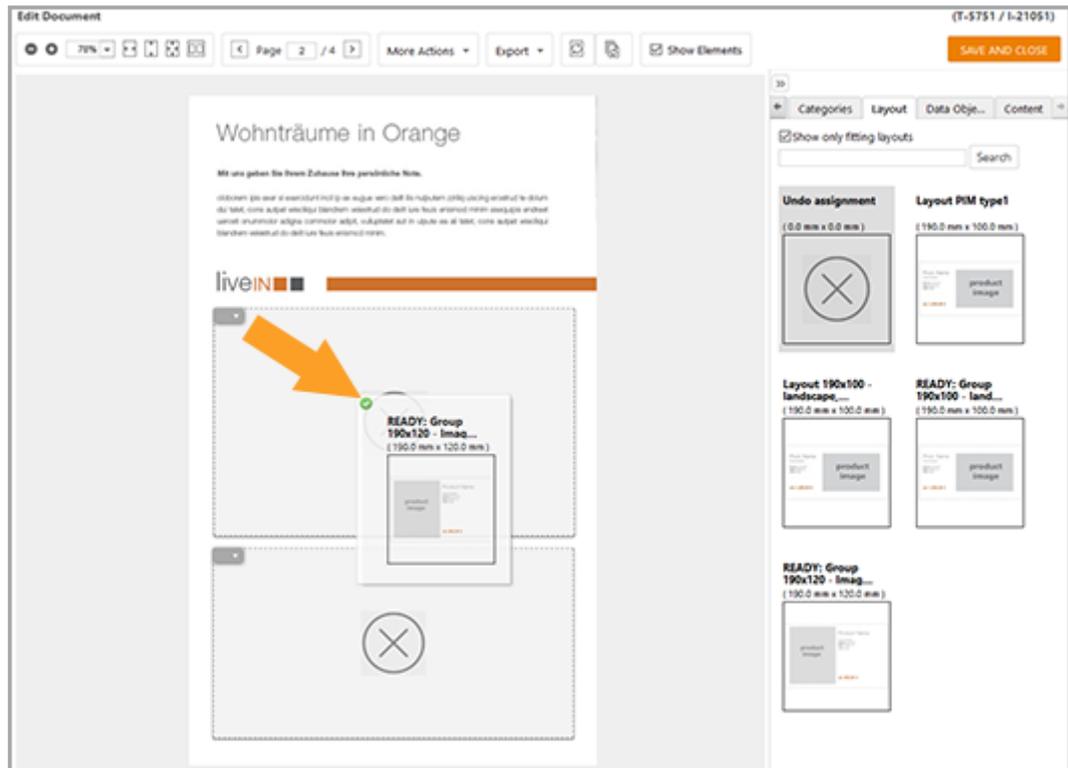
You have assigned a layout to the grid. The layout is displayed in the grid.

> 📄 **Note**
>
> To assign a layout to all the empty grids simultaneously, double-click a layout.

On the *Content* tab

1. Select the page on which you want to assign layouts to grids.

2. Switch to the *Content* tab.

3. On the *Content* tab, select the variable of the Smart Grid, see *Texts and Images* on page 85.

4. In the *Layout* area, click the pencil icon.

   A dialog is opened that displays suitable layouts.

5. If necessary, search for suitable layouts, see *Searching for a Layout* on page 71.

6. Click on the appropriate layout to select it.

7. Click *Select Layout*.

You have assigned a layout to the grid. The layout is displayed in the grid.

4.1.6.3.3 Deleting a Layout Assignment

Prerequisite: You have opened a document in the document editor. The document contains either static or dynamic grids and a layout is assigned to at least one of the grids.

On the *Layout* tab

1. Choose the page on which you want to delete the layout assignment.

2. Go to the *Layout* tab.

3. Choose:

    1. Open the context menu for the grid.
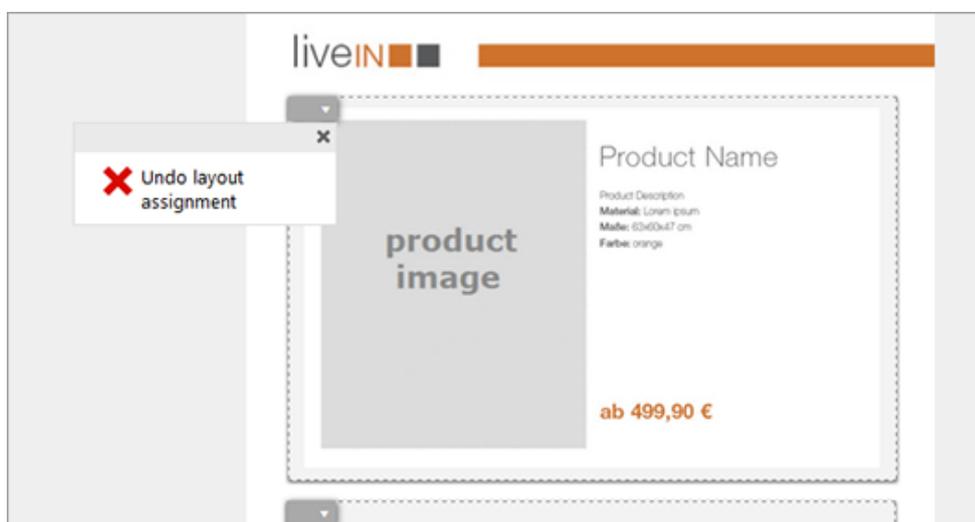
    2. Choose *Delete assignment.*

or

    1. Drag the gray X to the grid using drag and drop.

You have deleted the layout assignment. The grid is displayed without the layout image.

On the *Content* tab

1. Select the page on which you want to delete the layout assignment.

2. Switch to the *Content* tab.

3. On the *Content* tab, select the variable of the Smart Grid, see *Texts and Images* on page 85.

4. In the *Layout* area, click the pencil icon.

    A dialog is opened that displays suitable layouts.

5. Click the *Undo assignment* entry at the top left (graphic with a capital X).

6. Click *Select Layout*.

You have deleted the layout assignment. The grid is displayed without the layout image.

4.1.6.4 Data Object

In the last step, you specify the data object that you want to display in the grid.

> **Note**
>
> If you select the data object on the *Data Objects* tab, no selectable objects are initially displayed on the tab when it is first called up. The reason for this is that a grid is not selected yet. You therefore click the context menu for a grid. The data objects that you can select for this grid are then displayed.

Displaying Data Object Usage and Reusing Data

You may want to check how a data object is used in other documents. If you have assigned a data object, click the object handle context menu and choose *Previous usage*.

A dialog box opens displaying the documents in which you have already used the data object. The document ID, the document name, the affiliate, and the creation date are displayed.

If you set the cursor on one of the lines, a preview of the data object usage in the document in question is displayed. You may want to reuse the data from a different document in the one you are currently editing, for example, because the teaser text fits better in the new document. In this case, see the section *Reuse data object information* on page 84.

Click *Cancel* to discard your selection and to close the dialog box.

Associated Tasks

- *Searching for a Data Object* on the next page
- *Assigning a Data Object* on page 81
- *Cutting and Pasting a Data Object* on page 82
- *Copying and Pasting a Data Object* on page 82
- *Swapping Data Objects* on page 83

- *Reuse data object information* on page 84
- *Deleting a Data Object Assignment* on page 84

Next Step

In the next step, you edit the *Texts and Images* on page 85.

4.1.6.4.1 Searching for a Data Object

If a large number of products are displayed for a grid, you can search through these products.

Where to search for products

You search for products in two places:

- On the *Date Objects* tab

- On the *Content* tab, when you select the smart grid variable and assign a smart grid. Click the pencil icon in the *Data Objects* area. The *Select data object* dialog is then displayed, in which you can also search for data objects.

Controlling the Display of Object Variants

The object variants for the locale that you assigned to the document are displayed on the *Data Objects* tab by default (for example, *Germany*). If you want to view the variants for a different locale, select the locale in the top list (for example, *France*). The data objects with a variant for the locale *France* are then displayed.

When you change the locale, a different amount may be displayed from locale to locale. In this case, every variant has not been created for every data object.

> **Note**
>
> You can assign a data object to a grid in each variant. However, note that the data from the variant that the template designer has specified is always used: either the data from a specific locale is used, or the locale that you select for the document determines the data.

Restricting the Number of Data Objects Displayed Using a Tag

If a large number of data objects are displayed, enter a keyword in the search field on the *Data Objects* tab. You then see only the data objects whose properties contain the keyword.

4.1.6.4.2 Assigning a Data Object

Prerequisite: You have opened a document in the document editor. The document contains either static or dynamic grids. Categories (if necessary) and layouts are assigned to the grids.

On the *Data Objects* tab

1. Choose the page on which you want to assign data objects to the grids.

2. Open the *Data objects* tab.

3. Click the context menu of the grid to which you want to assign a data object.

   The tab shows the data objects that can be assigned.

4. Optional: further restrict the data objects displayed (see *Searching for a Data Object* on the previous page).

5. Choose:

      1. Drag the data object to the grid using drag and drop.

   or

      1. Click the data object.

The data object is assigned to the grid. Instead of the category image and a green X, an image of the data object is displayed. On the *Data objects* tab, the assigned data object is marked with a green checkmark. This lets you ensure that you do not assign a data object multiple times, even with multi-page documents.

> **Note**
>
> To assign a data object to all the empty grids simultaneously, double-click a data object.

On the *Content* tab

1. Select the page on which you want to assign data objects to grids.

2. Switch to the *Content* tab.

3. On the *Content* tab, select the variable of the Smart Grid, see *Texts and Images* on page 85.

4. In the *Data objects* area, click the pencil icon.

   The *Select product* dialog is displayed.

5. If necessary, search for suitable data objects, see *Searching for a Data Object on page 80*.

6. Click on the appropriate data object to select it.

7. Click *Select data object*.

You have assigned a data object to the grid. The data object is displayed in the grid.

4.1.6.4.3 Cutting and Pasting a Data Object

When you cut and paste a data object, you assign the data object whose inform- ation you are already using in the document to a different grid. The source grid in which the data object was initially added is then not assigned with any data object. You can also use this function for grids that are not on the same page.

Prerequisite: You have opened a document in the document editor. The document contains either static or dynamic grids. The same category is assigned to the source and target grids. Layouts are also assigned to the grids and, at minimum, a data object is assigned to the source grid.

1. Choose the page on which you want to cut a data object.

2. Open the *Data Objects* tab.

3. In the document preview, click the object handle next to the data object that you want to add to another grid.

   A menu opens.

4. Choose *Cut data object*.

5. Open the menu next to the grid where you want to paste the data object.

6. Choose *Paste data object*.

The data objectis assigned to the second grid. No data objectis assigned to the first grid, which is displayed with a gray X.

4.1.6.4.4 Copying and Pasting a Data Object

When you copy and paste a data object, you set the data object whose data you are already using in the document into a different grid. The source grid to which the data object was initially added is still assigned to the data object, which means that the data object is used twice in the document.
You can also use this function for grids that are not on the same page.

Prerequisite: You have opened a document in the document editor. The document contains either static or dynamic grids. The same category is assigned to the source and target grids. Layouts are also assigned to the grids and, at minimum, a data object is assigned to the source grid.

1. Choose the page on which you want to copy a data object.

2. Open the *Data objects* tab.

3. In the document preview, click the object handle next to the data object that you want to add to another grid.

   A menu opens.

4. Choose *Copy data object*.

5. Open the menu next to the grid where you want to paste the data object.

6. Choose *Paste data object*.

The data object is assigned to both grids.

4.1.6.4.5 Swapping Data Objects

When you swap data object, you swap the assignment of data for two grids with each other.
You can also use this function for grids that are not on the same page.

Prerequisite: You have opened a document in the document editor. The document contains either static or dynamic grids. The same category is assigned to the grids. In addition, layouts and data objects are assigned to the grids.

1. Choose the page on which you want to swap the data objects.

2. Open the *Data objects* tab.

3. In the document preview, click the object handle next to one of the data objects that you want to swap with another.

   A menu opens.

4. Choose *Swap data object*.

5. Open the menu next to the data object that you want to swap with the first data object.

6. Choose *Paste data object*.

The data objects swap grids.

4.1.6.4.6 Reuse data object information

Prerequisite: You have assigned a data object to a grid that you have already used in previously created documents.

1. Click the context menu of the object viewer and select *Previous use*.

    The dialog Previous usage of the data object is displayed.

2. Locate the document from which you want to use the data object data.

    - Place the cursor on one of the lines to preview the usage of the data object in the document in question.

    - Use the search field in the upper part of the dialog to search extensive lists with a full text search. Searches are performed in the displayed columns (document ID, document name and branch).

3. From the list, select the document from which you want to reuse the data object information.

4. Click *Apply* to confirm your selection and close the dialog box.

The data from the previous document will be entered into the corresponding fields.

4.1.6.4.7 Deleting a Data Object Assignment

Prerequisite: You have opened a document in the document editor. The document contains either static or dynamic grids and a data object is assigned to at least one of the grids.

On the *Layout* tab

1. Choose the page on which you want to delete the data object assignment.

2. Open the *Data objects* tab.

3. Choose:

    1. Open the context menu for the grid.

    2. Choose *Delete assignment*.

    or

    1. Drag the gray X to the grid using drag and drop.

You have deleted the data object assignment. The grid is displayed without an image; instead, the image of the assigned category and a gray X are displayed.

On the *Content* tab

1. Select the page on which you want to delete the data object assignment.

2. Switch to the *Content* tab.

3. On the *Content* tab, select the variable of the Smart Grid, see *Texts and Images* below.

4. In the *Data object* area, click the pencil icon.

    A dialog is opened that displays suitable data objects.

5. Click the *Undo assignment* entry at the top left (graphic with a capital X).

6. Click *Select data object*.

You have deleted the data object assignment. The grid is displayed without the data object.

4.1.7 Texts and Images

In this section, you learn how to edit the texts and images of the document. The template designer chooses which content you can edit and which editing options you can use in the template.

Where You Can Access Editable Content

In the document editor, select a page and go to the *Content* tabIf the page contains editable text or image box content, this will be displayed:
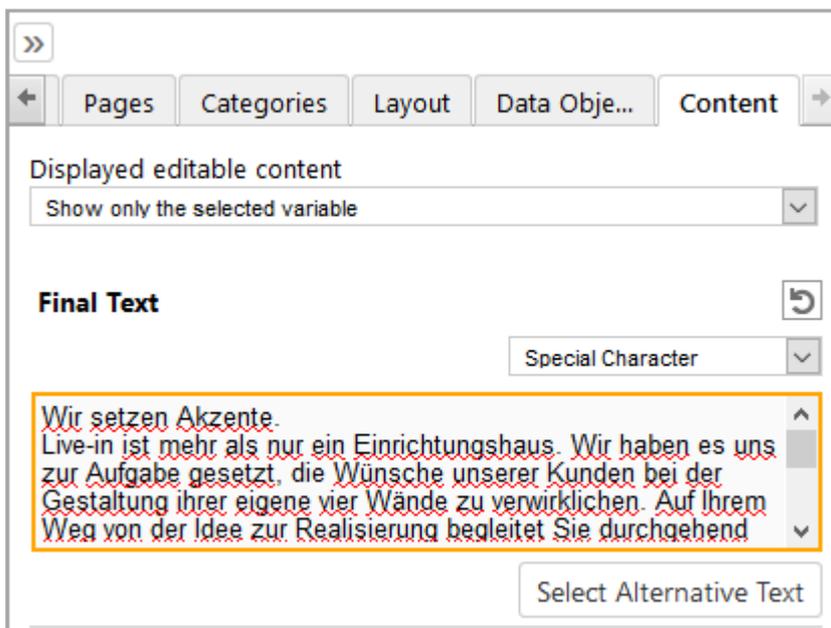
> **Note**
>
> The configuration of the document editor determines whether one or more variables are displayed and whether you have the selection options described below. If you have any questions, contact your system administrator, who sets up appropriate configurations, or the designer, who assigns a configuration to the templates.

To display different variables, you have several options:

- In the document preview, select a box on the page by clicking its object handle. Its corresponding variables are then displayed. Go through the boxes one after the other.
  If no boxes with a frame are displayed, check whether the *Show Elements* function is activated in the editing bar. If the function is not activated, choose *Show Elements*. Now, check whether any box is displayed with a frame. If no box with a frame is displayed, there is no box with corresponding variables on this page. Go to the next page.

- If you want to see all variables of a page on the *Content* tab, select *Show all editable contents on current page* in the *Displayed editable content* selection list. All the variables on the page are then listed one below the other. Note that the template designer may have deactivated this function under some circumstances.

- If you select *Group editable content of the current page* in the *Displayed editable content* selection list, a second list is displayed. 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, you can call up each Smart Grid in turn and other content in summary form.

Your Editing Options

The template designer has chosen how you can edit the variables in the template. The following sections describe the different editing options.

> **Note**
>
> Note that the template designer provides you with useful information about the variable in some circumstances. In this case, the ⍰ icon is displayed next to the variable. When you position the cursor on the ⍰ icon, the information from the template designer is displayed in a tool tip. Alternatively, help texts are displayed at the bottom of the tab.
>
> If you cannot access any help texts, the ⍰ icon is not displayed and the help text area at the bottom of the tab does not display any text.

Text

The following editing options are available for text variables:

| Editing option	Description	Recognizable by
Text entry	You can write the text yourself.	You can enter text in the input field. Formatting functions may be displayed above the input field.
Choice of alternative texts	The template designer specifies alternative texts from which you can select a text.	The *Select alternative text* button is displayed.

You can also combine a text entry and the choice of alternative texts. This means that, for example, you select an alternative text, but can still re-edit or even fully replace it.

Text Editor

To edit a text variable, you can also activate an editor in the template. You can then format the text, for example, by making it bold or italic. The options available in the editor depend on the settings in the template. For more information, see *Text Editor* on page 96.

Date Entry

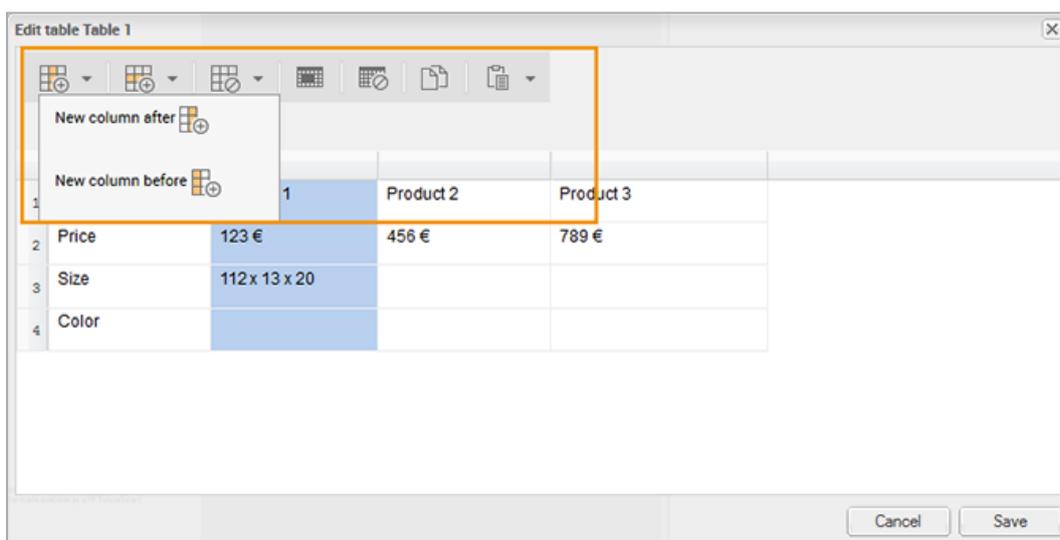On the *Content* tab, a date entry may also be required:
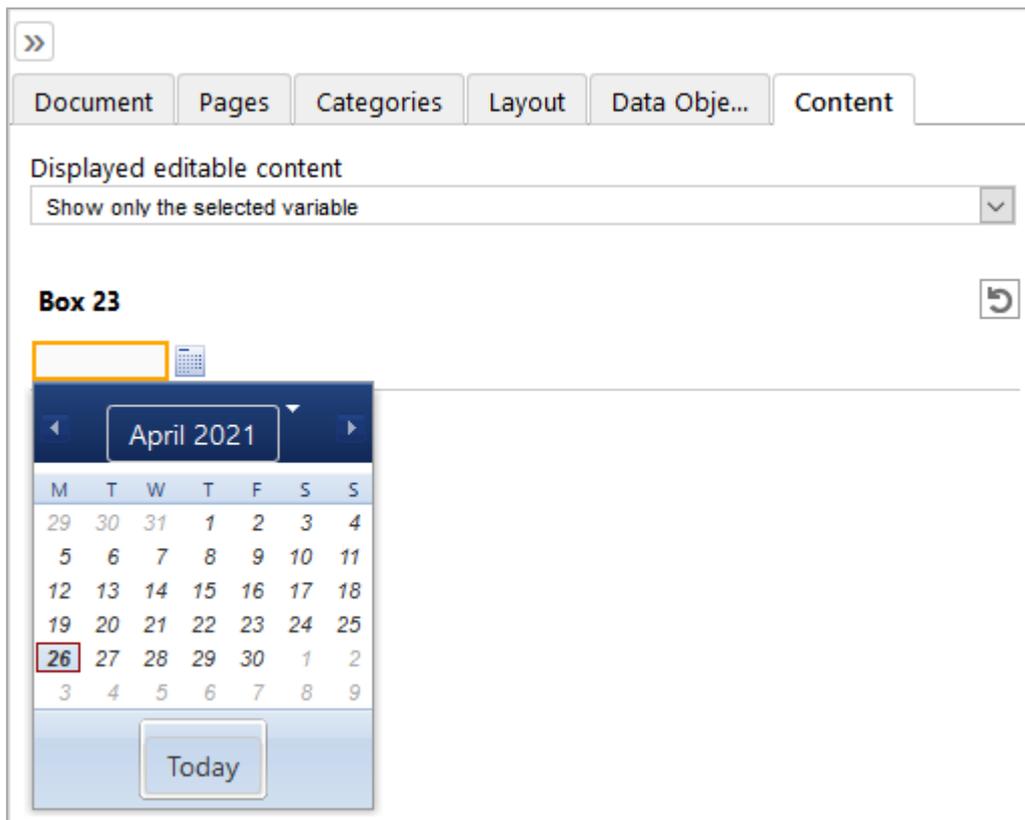
Enter your required date directly in the field or click the calendar icon. A calendar opens where you can select a date.

Table

If a variable consists of a table, you can edit the table in a separate dialog box. The table is listed by name on the *Content* tab. Click *Edit* to open the table.


To edit a cell, open it by double-clicking it.

In the top part of the dialog box, you can call up the following functions in order to edit the table.

Function	Description
	Select a column or row and insert a new column or row before or after it.
	Select a column or row to delete it.
	Select adjacent cells to merge them or select a cell to be split.
	Select a column or row to copy to the clipboard. Select a column or row and paste the content of the clipboard before or after it. You can also overwrite a selected column or row. When you insert a copied column or row, the table formatting is inserted as well as the content.

If the template is configured accordingly, you can edit or format the cell content with an editor. Switch to edit mode by double clicking in a cell. The editor is displayed at the top of the dialog box.
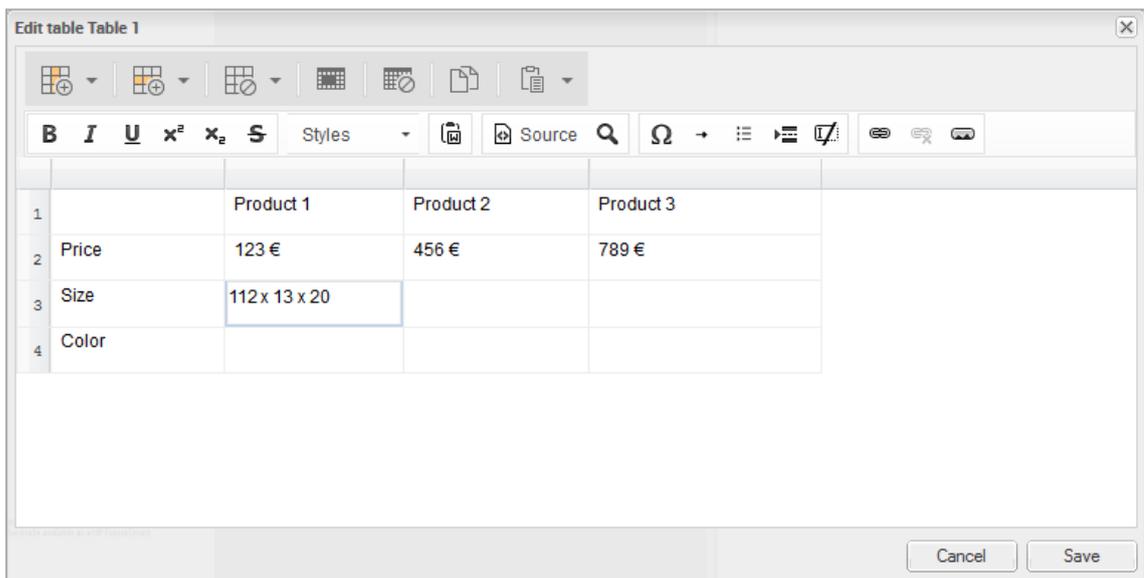
Click *Save* to save your entries and close the dialog. Click *Cancel* to discard your entries and close the dialog.

Image

The following editing options are available for image variables:

Editing option	Description	Recognizable by
Choice of different sources	You can freely select images from various sources: • You can upload images yourself. Activate the *Crop image after import* checkbox to edit the image immediately after importing it. If you have access to the *Media Pool* module: • Assets that you can access in the Media Pool • Quick access to assets that you have marked as favorites in the Media Pool • Quick access to assets that you can access through collections in the Media Pool Note: please note that under some circumstances this search returns fewer hits than the direct search in the Media Pool. The reason for this is that a search started from Brand Template Builder has more restrictions (for example, the list includes only assets for which the properties *Print quality* and *Suitable for Brand Template Builder* are activated).	The *Add Asset* button is displayed. Images from the Media Pool may also be displayed.
Choice of alternative images	The template designer specifies alternative images from which you can select an image.	In addition to the original image, at least one alternative image is displayed.

The choice of different sources and choice of alternative images can also be combined.

Selecting an Image Section

The template designer may give you the option of selecting a section of the image. In this case, the ✎ button is displayed on the previews for the images. If you click the button, the *Crop Image* dialog box opens. For more information, see *Selecting an Image Section* .
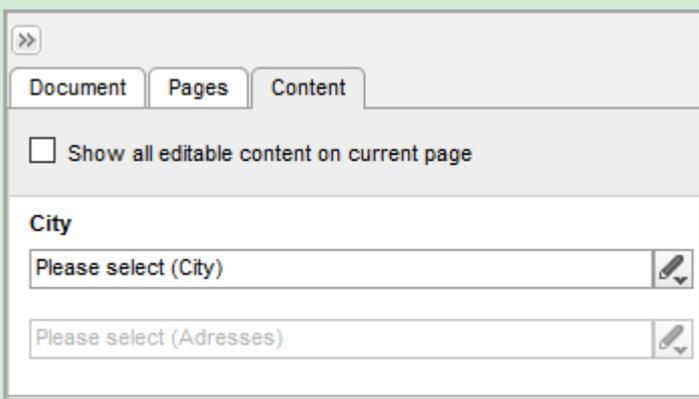
Picklists

Picklists can also be displayed on the *Content* tab. The template designer uses pick-lists to provide you with centrally managed texts and images.
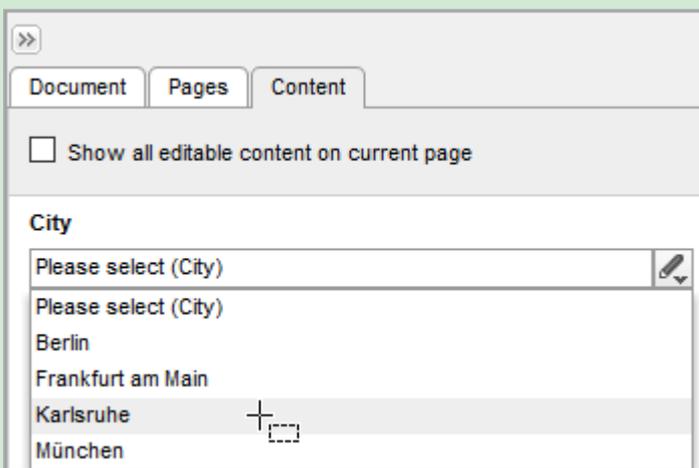
EXAMPLE

A brochure contains a field in which the address of the affiliate that creates and publishes the brochure is to be printed. The addresses of all the affiliates are managed in the system. The template designer has therefore linked the centrally managed data with the address field.

In the document editor, two picklists are displayed on the *Content* tab. The lists cascade (that is, the display of the second list is dependent on the selection in the first list). The second picklist is therefore grayed out until you have made a selection in the first list:

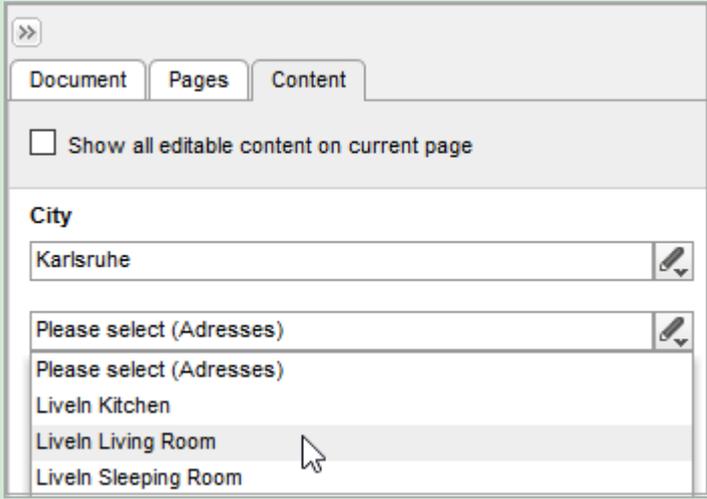In this example, there are multiple affiliates in each city. To ensure that you do not need to select the affiliate in an unclear and long list, first select the city in which the affiliate is located:

Then, choose an affiliate in the selected city in the second picklist:

The address data for the selected affiliate is automatically written to the assigned variables and can also be viewed in the document preview after you refresh it.

Usually, you cannot see the corresponding variables on the *Content* tab. If you can, the template designer may have allowed you to re-edit the data.

Note the following points:

- Instead of two picklists, you may see more cascading lists, lists that are independent of each other, or only one list on the *Content* tab in some circumstances. This depends on your use case.

- If only the content of a variable is dependent on the picklist, the picklist may be displayed directly next to the variable.

> **Note**
>
> Note that the display of entries in lists may depend on the affiliate IDs that are selected for you. As a result, when you edit documents based on the same template, you may see different entries if you are assigned different affiliate IDs during editing.

Relationship Between Variables on the *Content* tab and Boxes in the Document

Note that a variable for texts in particular is not necessarily equivalent to the boxes in the document:

- *Boxes* are highlighted by an orange frame in the document preview and are equivalent to the text and image boxes created in the original InDesign document.

- *Variables* represent the part of a box that you can edit. If you can change all the content with the variable, the variable does not represent the box. However, the template designer can also create multiple variables for a text box. In addition, a variable may affect multiple boxes on multiple pages due to its text flow. You edit a text flow for the start box.

Furthermore, you may not be able to identify a relationship between the variables and the changed box content:

EXAMPLE 1: THE CONTENT IS CALCULATED BY A FORMULA.

For this purpose, you enter values in one or more variables (for example, a discount in %). If configured accordingly, Brand Template Builder calculates the content (for example, a discounted price) for one or more boxes or box sections. The calculated prices do not have to be on the same page; instead, they can be created throughout the document.

EXAMPLE 2: THE CONTENT IS CREATED AUTOMATICALLY.

Here, you enter values in no variables, one variable, or several variables (for example, text). Text. An external program is responsible for automatically creating the content and, for example, generates a QR code that is displayed in a box.

If necessary, you can call the *Override generated content* function from the object handle for an automatically filled box. When you call this function, the current and automatically generated box content is displayed.
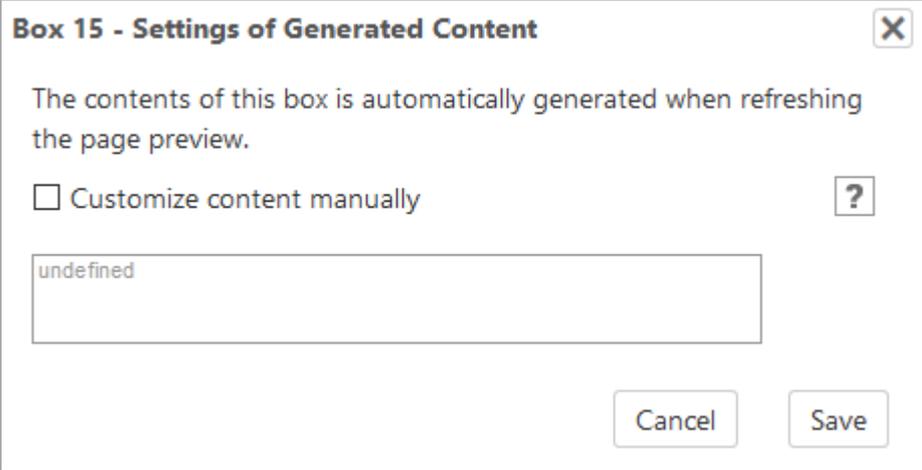
Box 15 - Settings of Generated Content ✕

The contents of this box is automatically generated when refreshing the page preview.

☐ Customize content manually   ?

undefined

Cancel   Save

If you activate the *Customize content manually* checkbox, you can change the automatically generated result.

If you do not understand the relationships, use the ? icon to see the tool tips that the template designer provides for you. If this information is insufficient, contact the template designer.

Next Step

Check whether you can change the display of the boxes (see *Displaying Boxes in the Document* on page 101).

4.1.7.1   Text Editor

To edit a text variable, you can also activate an editor in the template. You can then format the text, for example, by making it bold or italic. The options available in the editor depend on the settings in the template.
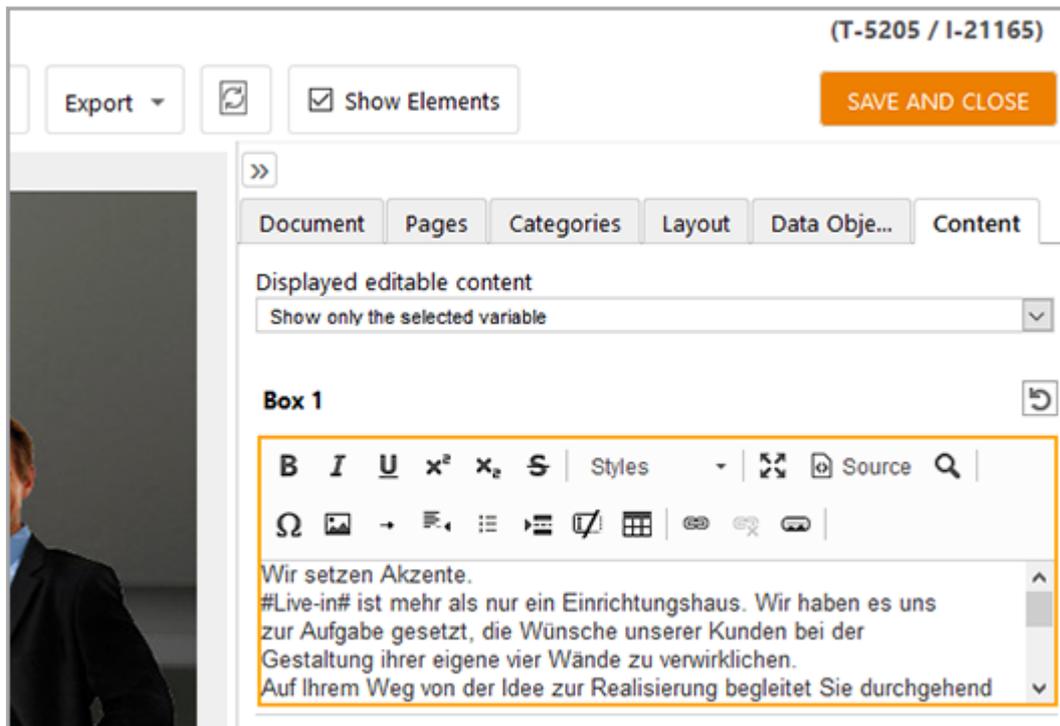
Available Functions

The template designer can give you access to the following functions, among others:

- *Text formatting*: bold, italics, underline, subscript, superscript, and strikethrough

- *Control characters*: tabulator, right indent tab, frame break, and column break

- *Objects*: special characters, bullet points, links, images, media links

- *Predefined formats*: you can assign predefined and centrally maintained format templates to the texts (for example, for headers or bullet lists). Note

that the display in the editor usually differs from the display in the document. Format templates can be provided for characters, paragraphs, tables, and cells.

- *Tables*: click the ⊞ button to add a table. A dialog box opens where you can enter the basic table properties such as the number of rows and columns. Choose *OK* to add the table. You can edit the table directly. Right-click the table to open the context menu, where you can access additional editing options:

- View options: display as a source text, maximize, restore the editor

- Search/replace

- Clipboard: add content from MS Word

- Links: The editor offers you the possibility to open a link in a new browser window. To do this, use the context menu by right-clicking on the link or click on the link while holding down the CTRL/CMD key.

Most of the functions are represented with icons that are based on conventional images. However, if you do not understand the function behind any icon, set the cursor on the icon. The function is then displayed in a tool tip.

> **Note**
>
> Note that the template designer usually provides you with a selection of these functions based on how you are supposed to edit the variable. The options provided therefore vary from document to document and in some circumstances even from variable to variable.

Control Characters

You can use control characters to define formatting for texts. You enter the control characters directly in the editor. InDesign interprets the control characters and adds the relevant formatting.

> **Note**
>
> Note that some formatting can be accessed either by using the editor buttons or as control characters. To ensure that you can use these control characters in the editor, the editor must be configured in such a way that the formatting can also be accessed as a button. The formatting to which this applies is highlighted accordingly in the table below. If you have any questions, please contact the responsible template designer or the system administrator.

Space Characters

Character	Description	Remarks
{f}	Digit-wide space character	
{ts}	Narrow space character	
{q}	Four-per-em spaceFour-per-em space	
{hs}	En space	
{nb}	Word joiner	Note: hyphenation must be deactivated!
{nbsp}	Non-breaking space character	

Hyphens and Dashes

Character	Description
{h}	Hyphen

Character	Description
{md}	Em dash
{nd}	En dash

InDesign Control Characters

Character	Description	Remarks
{n}	Line wrap (paragraph change)	
{d}	Line wrap (line change)	
{c}	Column break	Note: this must be followed by a line wrap (paragraph change) in the editor. Note: the formatting must be available in the editor for you to be able to use the control characters.
{fb}	Frame break	Note: this must be followed by a line wrap (paragraph change) in the editor. Note: the formatting must be available in the editor for you to be able to use the control characters.
{t}	Tabulator	Note: the formatting must be available in the editor for you to be able to use the control characters.
{i}	Hanging indent up to the place where the control character is inserted	
{rt}	Right indent tab	Note: the formatting must be available in the editor for you to be able to use the control characters.

Special Characters

Character	Description
{b}	Double dagger

Character	Description
{au}	Double quote, lower (in German: opening)
{ao}	Double quote, upper (in German: closing, in English: opening)

4.1.7.2 Selecting an Image Section

The template designer may give you the option of selecting a section of the image. In this case, the ✎ button is displayed on the previews for the images. If you click the button, the *Crop Image* dialog box opens.

> 📓 **Note**
>
> You only change the size of the visible section of the image. The actual image box is not affected. Its size is defined in the template.
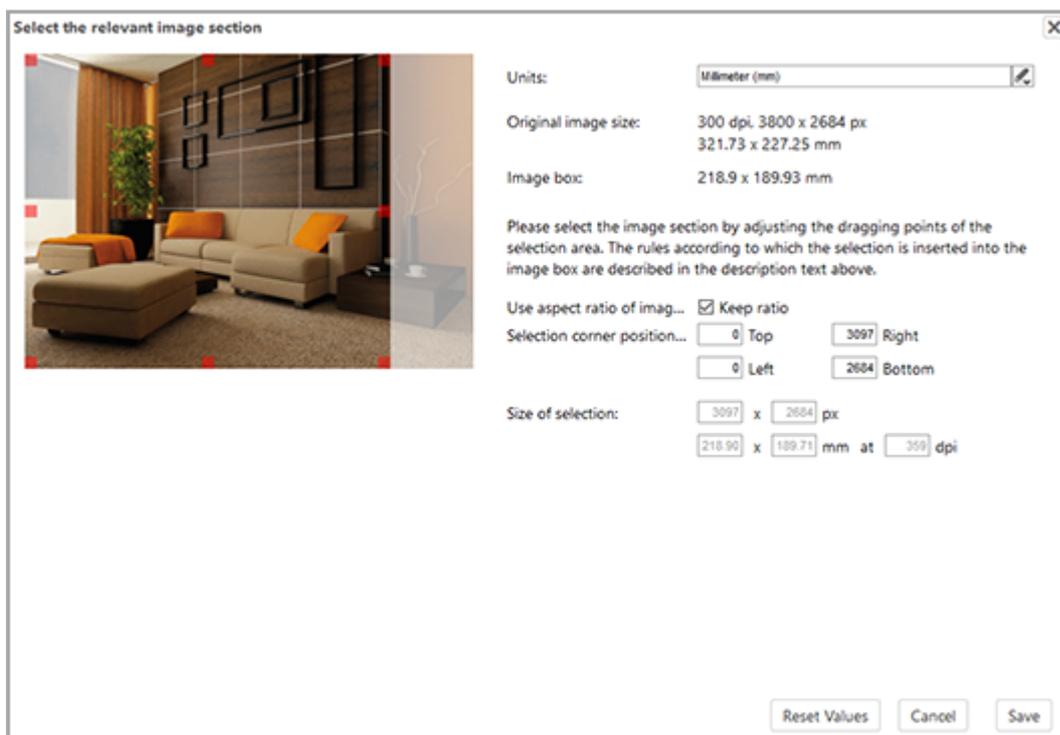
First, select the length unit in which you want to set the image section in the top list: millimeter, centimeter, or inch. The size of the original image and its corresponding image box are displayed below that. The preview displays a frame with the image section that is currently set. The frame is initially the maximum possible size with the aspect ratio that the box has in the document.

Move the frame on the image and use the drag point to change the size until you have selected your desired section. Note that in the default setting, the aspect ratio of the frame is retained.

If you want to change the aspect ratio, deactivate the *Keep ratio* checkbox and select an appropriate size. Note that this may lead to white space in the box. Therefore, test the setting: leave the *Crop Image* dialog box and refresh the view. The box now displays the new sections.

After you make your selection, the *Position of selection* area shows the positions of the upper left and lower right corners of the frame. The resolution in dpi and the size of the area in pixels and in the selected length unit are displayed below that.

Choose Save to confirm your selection and return to the document editor.

4.1.8   Displaying Boxes in the Document

The template designer can allow you to transform boxes. In this section, you can learn which transformations you can use.

How You Know that You Can Transform a Box

You know that you can transform a box if the box handle is a collapsible menu and you can access the *Transform* function in the box:

Click *Transform* to open the functions. The *Transform* dialog box is displayed.

Available Transformations

At most, the template designer can make the *Move*, *Scale*, and *Rotate* functions available to you. In some circumstances, only one or two transformations are enabled for you. If so, the areas that are disabled are grayed out in the *Transform Box ...* dialog box and cannot be edited.

Movement

First select whether you want to move the box relative to the original position or to a new absolute position. Depending on your choice, the X and Y fields are interpreted as follows:

- Relative shift: The values are understood as a shift around the value along the respective axis. Positive values shift the value to the right (X-axis) or down (Y-axis), negative values to the left (X-axis) or up (Y-axis).

- Shift to an absolute position:

  - X: horizontal distance from the top left corner of the document

  - Y: vertical distance from the top left corner of the document

Scaling

During scaling, you change the dimensions of the box. The template designer presets a scaling range for you. Set the cursor on the [?] icon to see the range in which you can change the box size. Enter suitable values in the required format fields (width x height). If you enter invalid values, the boxes are highlighted in red.

Rotation

When you use the rotation transformation, the box is rotated counter-clockwise around its center point. If you enter the angle 45° for a text box that has not been rotated previously, the text then runs in a 45° angle toward the top right corner. Set the cursor on the [?] icon to see the permitted rotation angles.

> **Note**
>
> The angle that is entered is the absolute value. If a box in the template is already rotated by 5°, for example, and you set the angle to 10° during customizing, then the box is rotated by 10° in total.

Notes

Please note that the display of boxes may also change based on the content. For example, the height of a text box - and also the height of the document if configured accordingly - can be adapted to the entered text character count. Image boxes can also be adapted to the size of the image - or the image can be fitted into the box. These changes are determined by the template designer. If you have any questions, please contact the responsible template designer.

Next Step

If necessary - and if this function is available in your system - you start a discussion with colleagues in the next step (see *Collaboration with Colleagues* below). Alternatively, you can prepare to publish the document (see *Preparing for Distribution* on the next page).

4.1.9   Collaboration with Colleagues

Brand Template Builder lets you create documents in close collaboration with your colleagues. You have the following options:

- You can export your documents directly from the document editor as original files in order to send them to an external partner or agency, for example. You can re-import an exported document. For more information, see *Exporting a Print Template* below.

- If the *Review Manager* module is enabled in your system, you can efficiently start review processes with your colleagues. You can store reviews, comments, and discussions to ensure full traceability. For more information, see *Reviews* on the next page.

4.1.9.1   Exporting a Print Template

You can export your documents directly from the document editor as original files in order to send them to an external partner or agency, for example. You can re-import an exported document.

> **Attention**
>
> It may not be possible to transfer all of the changes during the import!

If you want to export your document from the document editor in its current editing state, choose *More Actions > Export to Prepress Document* with either *With Images* or *Without Images*. The print template is then generated. If you selected

the option *Without Images*, only one InDesign file is generated. If you selected the option *With Images*, a ZIP file containing the InDesign file and the images is generated. A dialog box then opens in which you choose whether you want to save the generated file or open it directly.

To upload the exported file as a print template, click *More Actions > Import from Prepress Document*. This opens a new dialog box. Click *Browse* to enter the storage location of the file. Click *Save* to upload the file. Click *Cancel* to cancel the process.

4.1.9.2   Reviews

If the *Review Manager* module is enabled in your system, you can efficiently start review processes with your colleagues. You can store reviews, comments, and discussions to ensure full traceability.

How You Know that You Can Use the Review Manager Module for Reviews with Colleagues

Choose *More Actions*. If the *Review Manager* item is entered in the menu that opens, you can start a review.

How to Review with Colleagues

Choose *> More Actions > Create new Review*. The document preview in Review Manager then opens. An entry notifies you if a review has already been created. If you set the cursor on the entry, a tool tip shows a summary. If you click the entry, the review is opened again in Review Manager.

Additional Information

For more information, see the Review Manager user manual. See *Additional Documentation* on page 191.

4.1.10   Preparing for Distribution

You can manually download a finished INDD document and publish it or send it as an e-mail at any time. The template designer can enable up to two further channels for you to do so:

- *Print*: in this case, the finished document is sent directly to a printing service with a print job. You enter the details about the print order while editing the document. See *Print Order* on the facing page.

- *Digital publication*: in this channel, the finished document is published directly in the *Media Pool* module. Other users can use this module to search for

and download the document in the system. For more information, see *Public-ation in the Media Pool* on page 108.

4.1.10.1   Print Order

In the template, the template designer can specify whether the finished document can be sent directly for printing.

How You Know that You Can Send the Finished Document for Printing

If the finished document can be sent for printing, the following section is displayed on the *Document* tab in the document editor:

Prepare Distribution

Print Order

Printer   No printing service selected
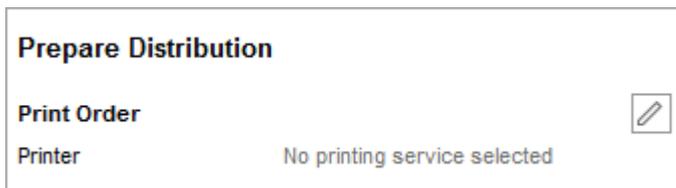
After you close the document editor for the first time, the *Step 4 - Print Order* button is displayed as follows:

4   Print Order   ? →   No printing service selected

If the finished document cannot be sent for printing directly, the section is not displayed on the *Document* tab and the *Step 4* button remains grayed-out after you complete step 3:

Specifications for Print Order

You open the dialog box in which you enter the details for a print order as follows:

- In the document editor, choose on the *Document* tab.

- In the customizing wizard, click *Step 4 - Print Order*.

The following dialog box opens:

You can enter the following details in the dialog box:

> 📋 **Note**
>
> Click the question mark to call a tool tip with further information about the possible settings.

Production Area

Field	Description
Output method	Select the output method for creating the document (for example, whether you want a high or low-resolution PDF). The output methods are configured by your system administrator. If you have any questions, please contact your system administrator.
Output options	Select further options for the production of the document. For example, specify that you want to produce multi-page documents as single pages.

Printer and Costs Area

Field	Description
Select printing service	Select a printing service. You select one of the options defined in your system. Additional fields appear only once you have selected a printing service. If you can only select one printing service, it is preset.
Quantity	Choose the number of copies of the document to be produced.
Total	If a price list is defined for the template used, the price for the production of the number of copies required is automatically calculated and displayed here.
Additional delivery information	Note: Only visible if enabled for the printing service. You can enter comments about the print job for the printing service in the free-text field.
Desired delivery date	Note: Only visible if enabled for the printing service. Click 📅 to open a calendar where you can select the required delivery date.
Order number and activity code	Note: Only visible if enabled for the printing service. Enter the order number for the print job here.
E-mail address	Enter the e-mail address of the contact person for the print job here. This field is automatically filled with your e-mail address.

Delivery Area

📄 **Note**

The fields are visible only if you have selected a printing service in the *Printer and costs* area.

Field	Description
Delivery amount to my delivery address	If you have selected a printing service, you can define details for the delivery. In this field, the value from the *Quantity* field in the *Printer and Costs* area is entered first. If you split a delivery and send it to different warehouses, the partial deliveries are automatically deducted from the value.
Edit address	Edit your address information and the billing and delivery address.

| Field	Description
Add ware-house	Note: available only if the template designer has set the appropriate config-uration. Enter the warehouse to which a partial delivery of the print job should be sent.
Add address	Note: available only if the template designer has set the appropriate config-uration. Enter another address to which a partial delivery of the print job should be sent, for example. Note that these quantities are not automatically deducted from the total amount.

4.1.10.2 Publication in the Media Pool

In the template, the template designer can allow the finished document to be published directly in the *Media Pool* module. The document is always published as an InDesign file.
Through the *Media Pool* module, other uses can search for the document in the system and download it in its original format or following a conversion (for example, to PDF).

How You Know that You Can Publish the Document in the *Media Pool* Module

If you can publish the finished document directly to the *Media Pool* module, the *Step 5 - Publish in the Module Media Pool* button is displayed as follows in the customizing wizard:
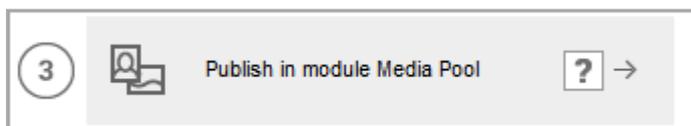
If direct publication is not possible, the button is grayed out.

Specifications for Publication in the *Media Pool* Module

If you are publishing a document in the *Media Pool* module, you create it as an asset. To do so, you must enter the required meta data for the asset. If you click the button *Step 5 - Publish in Module Media Pool* in the customizing wizard, the follow-ing dialog box is displayed:

Edit the fields. For a detailed description of the meta data, see the user manual for the *Media Pool* module (see *Additional Documentation* on page 191).

In addition, note the following special features of meta data in Brand Template Builder:

Metadata	Description
Validity and *Hide if not valid*	If a validity date has been defined in the document properties, the *Validity* field is prefilled with this date and the *Hide if not valid* checkbox is activated.
Suitable for Brand Template Builder	To enable the use of the document published in the Media Pool as the basis for a template in Brand Template Builder again, activate the *Suitable for Brand Template Builder* checkbox.
Print quality	Activate the *Print quality* checkbox to confirm that the asset is available in high resolution and is suitable for printing.
Save data of form without publishing	If you activate the *Save data of form without publishing* checkbox, the data for the document is saved. However, the document is not published in the Media Pool. This procedure may be required, for instance, if you are editing the copy of a document that is already published in the Media Pool but do not want to publish the copy.

> **Note**
>
> In this dialog box, you only prepare for the publication in the *Media Pool* module. The document is not published in the *Media Pool* module until you have finished the document in step 6 of the customizing wizard.
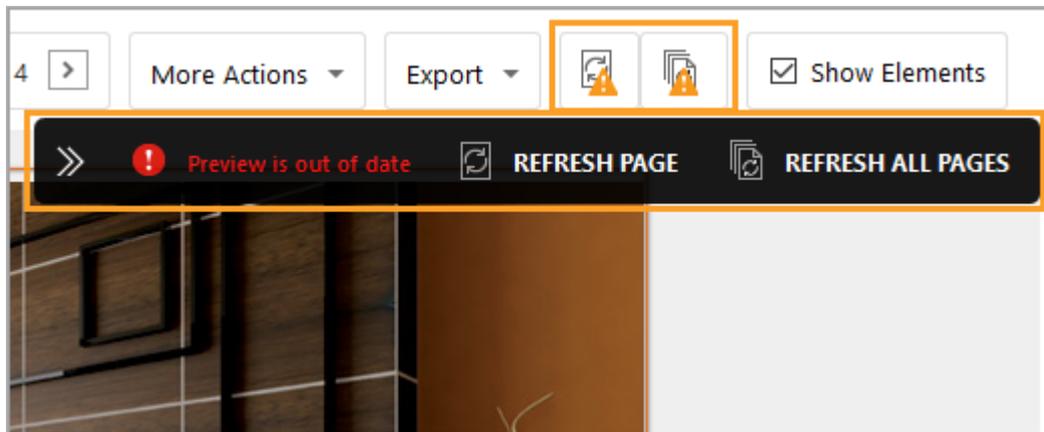
4.1.11   Refreshing the Document Preview

When the document is changed, the preview in the document editor must be refreshed. It can be updated refreshed with a real-time preview or manually, depending on the template on which your document is based. There is a distinction between the following situations here:

The Real-Time Preview is Available in Your Document

If the real-time preview is available in your document, the ⟳ icon is displayed in the document editor formula bar. If you click the button, the real-time preview is refreshed and all changes are applied automatically.

The Real-Time Preview is Not Available in Your Document

If the real-time preview is not available in your document, the document editor shows that the view does not indicate the editing status in the editing bar and in a black overlay:
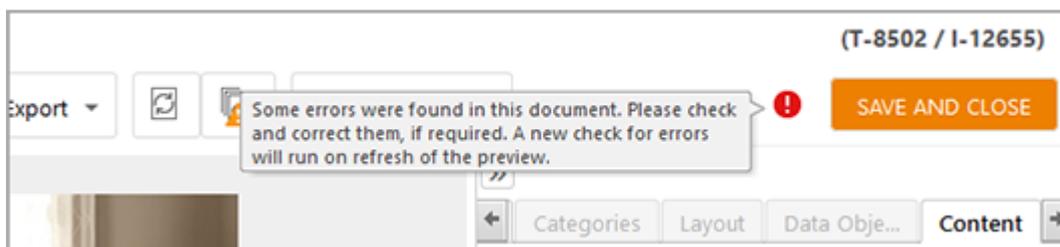

You can trigger the page refresh either in the formula bar or overlay, and can also do so for all of the pages if the INDD document has multiple pages. If you click the arrow keys in the overlay, the overlay is minimized to a red exclamation point.

4.1.12   Finishing or Pausing Editing

If you finish customizing the document or want to continue editing the document later, choose *Save and Close* in the top right corner of the document editor.

If you cannot finalize your document yet, an exclamation mark is displayed next to the Close button.

In this case, Brand Template Builder has detected errors in the document:
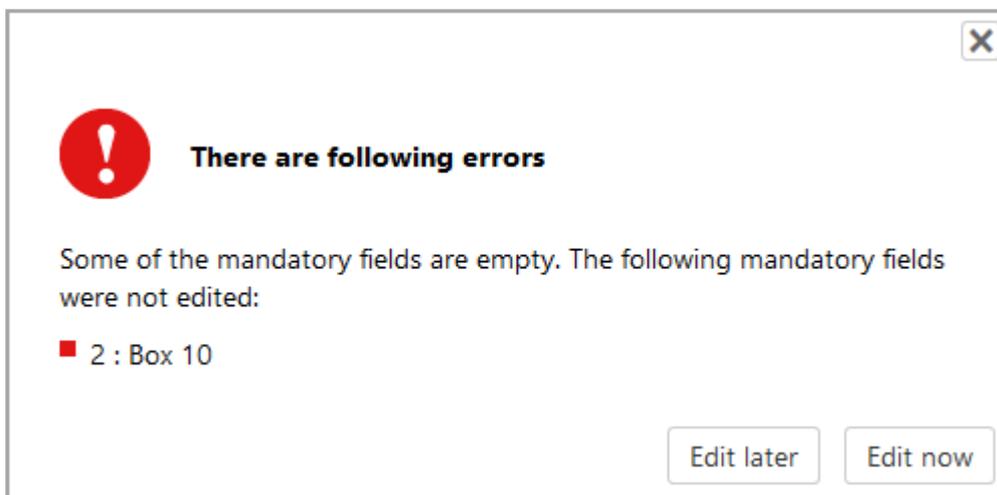
Possible Errors

Before the document is closed, the following issues are checked:

- Mandatory variables: have all mandatory variables been filled in (text and image variables)?

- Boxes with rules: does the entered content comply with the rules?

- Text box with date: does the date format meet the provisions for the locale?

- Smart Grid: is the data from Marketing Data Hub up to date?

- Number of pages: is the number of pages between the defined minimum and maximum numbers?

- Divisibility of the number of pages: can the number of pages be divided up as specified?

- Rotated boxes: do the rotated boxes comply with the permitted angles?

- Document size: does the size of the document comply with the defined dimensions?

The results of the validation are displayed in a dialog box that opens.

If data is no longer up to date and you have configured the document template to check that data is up to date, a table with the changed data is also displayed. Choose which data is displayed in the document.

Choose *Cancel* to return to the document and resolve the errors. Choose *Complete later* if you want to save the document with the errors and resolve the errors at a later time.

Next Step

If you have finished or paused document editing in the document editor, the document is displayed in the customizing wizard. If you now want to continue editing, follow the descriptions in the next chapters. If you also want to leave the customizing wizard, click one of the buttons below:

- *Close document*: the document is saved with your changes with the status *In Progress*. If you want to continue editing the document later, search for and open it (see *Open* on page 23).

- *Close and delete*: the document is closed and then deleted.
  Attention! You cannot reverse the deletion.

4.2   Online Documents

This chapter describes the editing options for online documents.

> **Note**
>
> The options you have when editing the document are determined by the designer when creating the template. The Designer can give you very different editing options depending on the template. Therefore, not all of the editing options described in this chapter will be available in every document. Contact the designer if you have any questions or if editing options are not available.

How you can perceive that you are editing an online document

When you open an online document for editing, you are directly shown the editor for online documents:
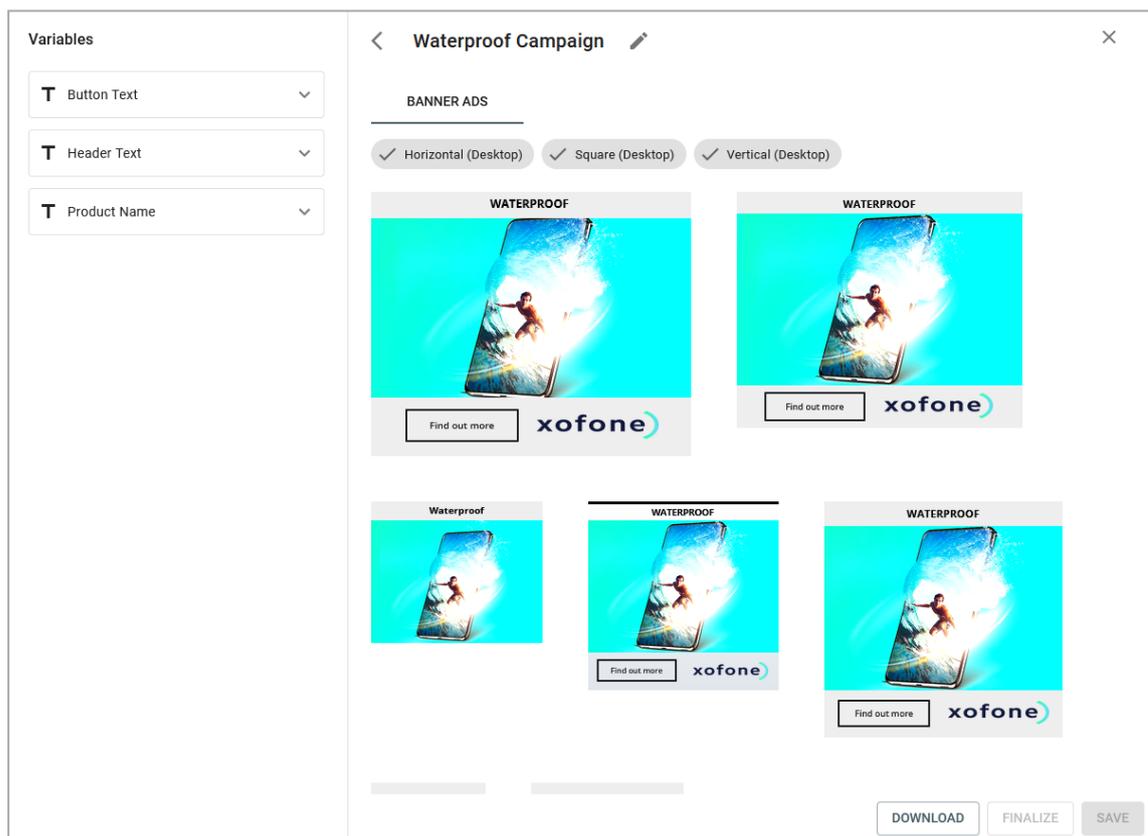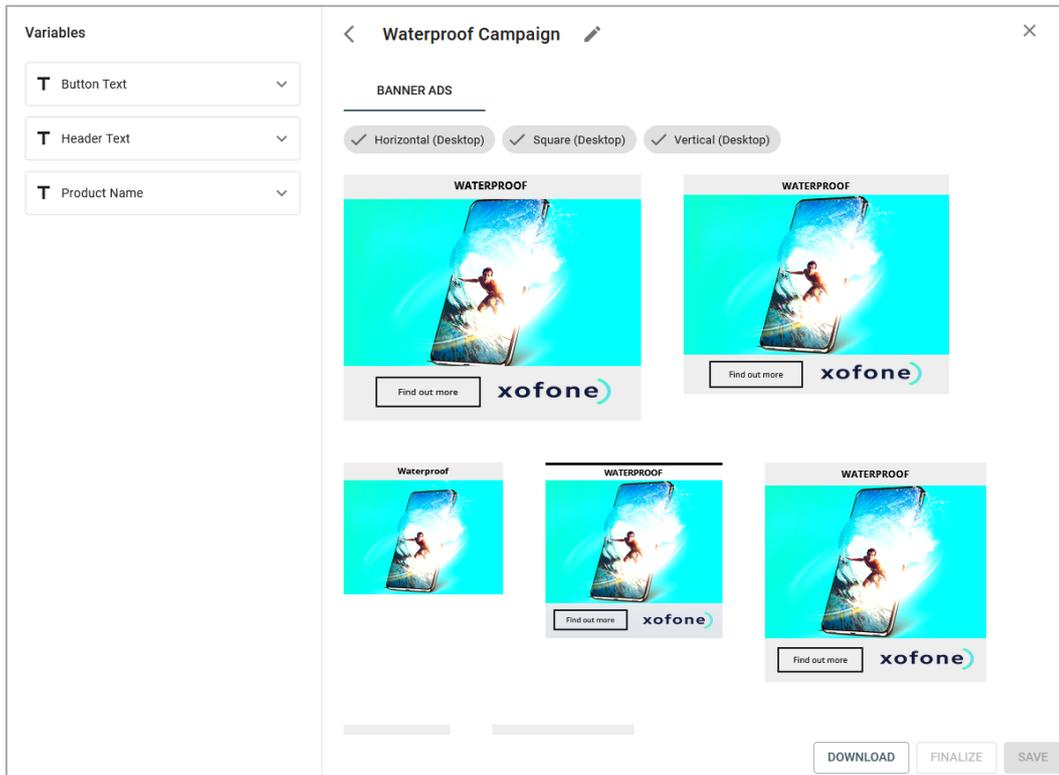

When editing an INDD or an HTML document, the customizing wizard is displayed, see *Customizing Wizard* on page 173.

Editing Online Document

1. Create an online document (see *Searching for and Using Templates* on page 17) or open an online document in progress (see *Open* on page 23).

   The document is displayed in the editor:

2. Click the pencil icon next to the field above the displays and enter a name for the document. If necessary, click the globe icon in the field to enter the name in multiple languages. Save your input.

3. Edit the variables displayed in the left area of the editor.

4. Click *Save*.

The document is checked and saved. If the document was saved without errors, you can finalize it (see *Finalize online document* on page 137) or download it.

4.3 HTML Documents

This chapter describes the editing options for HTML documents.

> 📄 **Note**
>
> When creating the template, the designer chooses which options are available to you while editing the document. The designer may allow very different editing options, depending on the template. As a result, not all of the editing options described in this chapter are available in each document. If you have questions or cannot access editing options, contact the designer.

How You Know that You Are Editing an HTML Document

When you open an HTML document in the customizing wizard, four editing steps are displayed for you:
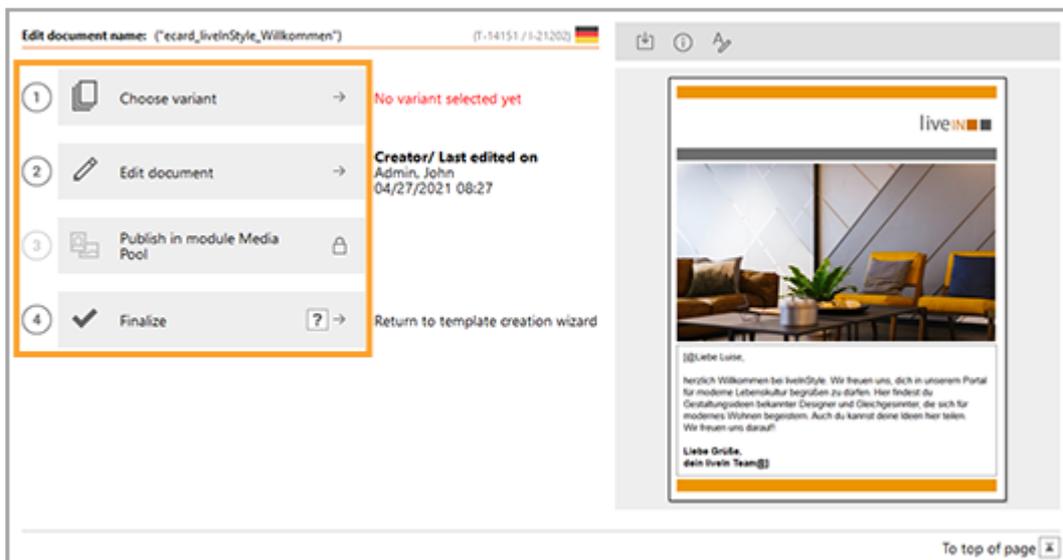
For an INDD template, six editing steps are displayed (see *INDD Documents* on page 29).

The Editing Process

- *The Document Properties* on the next page: you choose the basic document properties such as the document name, the specified locale, the branch affiliation, and the validity.

- *Variant* on page 119: If you have set up variants for a document, then you select a variant while you create the document. If necessary, you can change the variant again afterwards. The variant can affect the appearance, content, and the editing options in the document.

- *Texts and Images* on page 122: in this section, you learn how to edit the texts and images of the document.

- *Preparing for Publication in the Media Pool Module* on page 132: you can manually download a finished HTML document and publish it manually at any time. The designer can also allow you to publish the finished document directly in the *Media Pool* module.

4.3.1 The Document Properties

Choose the basic document properties, such as the document name, the specified locale, the branch affiliation, and the validity. You must edit the document properties in the following situations and fill out the mandatory properties at minimum:

- You have created the document and you want to enter the properties but want to continue editing the document afterwards.

- You have created and possibly edited the document but cannot yet finish editing it, and you therefore have to save the document with the status *In Progress*.

- You have created and edited the document and you are finalizing the document in one work process.

- The designer has selected the editing of properties as a mandatory step. In this case, the *Edit document properties* dialog box is displayed immediately after you open the document in the customizing wizard.

Document Properties

A document has the following editable properties:

Property	Mandatory property	Description
Document name	Yes	Enter a name for the document. Possibly, the name is preset according to a defined scheme. You can change or supplement the preset values.

Property	Mandatory property	Description
Affiliate ID	No	Note: visible only if the *Affiliate ID* function is used in your system. Select an ID from the affiliate IDs assigned to you. If no affiliate ID is set for you, the ID of the document is set as follows: As long as the ID of the document is not set, the ID is set by the top dropdown with affiliate reference. When the user selects an entry from the dropdown, the affiliate ID of the entry is taken as the affiliate ID of the document. Note that entering a affiliate ID limits the visibility of the document. If you are allowed to enter all affiliate IDs, the field supports the search: According to the input, the system searches the affiliate IDs and returns the hits. A maximum of 100 hits are displayed. If more are found, a corresponding display informs, so that you can refine the search.
Validity	No	Enter the validity of the document. Note that the validity is an access criteria.
Locale	Yes	Assign a locale to the document. This decision may have an effect on the content and how it is displayed (for example, the display of numbers or date information). The document may be created in several languages. In this case, you define a primary locale and the locales #2, #3, and so on.

Editing Properties in the Document Editor

As well as carrying out editing in the customizing wizard, you can also enter the properties in the document editor. On the *Document* tab, you edit the properties and, where necessary, the document variant and size. For information about editing the variant or document size in the document editor, see *Variant* on page 119.

Prerequisite: You have opened a document in the customizing wizard.

1. Open the document editor by clicking *Step 3 – Edit document* in the customizing wizard.

2. On the *Document* tab, choose [icon] in the *Properties* area.

   The *Edit document properties* dialog box is displayed.

3. Edit the mandatory properties: enter a name and specify one or more locales of the document.

4. Optional: select an affiliate ID and define the document validity.

5. Choose *Save and Close*.

The properties are saved.

Editing Document Properties in the Customizing Wizard

Prerequisite: You have opened a document in the customizing wizard.

1. If the *Edit document properties* dialog box is displayed automatically, go to step 2. If the dialog box is not displayed, choose:

   a. You have created the document and you want to enter the properties but want to continue editing the document afterwards:

      ▪ Choose [icon] on the right above the preview in the customizing wizard.

   b. You have created and possibly edited the document but cannot yet finish editing it, and you therefore have to save the document with the status *In Progress*.

      ▪ Choose *Close document*.

   c. You have created and edited the document and you are finalizing the document in one work process:

      • Click *Finalize*.

   The *Edit document properties* dialog box is displayed.

2. Edit the mandatory properties: enter a name and specify one or more locales of the document.

3. Optional: select an affiliate ID and define the document validity.

4. Choose *Save and Close*.

The properties are saved:

- The *Edit document properties* dialog box was displayed automatically: the document remains open in the customizing wizard.

- You chose [icon] : the document remains open in the customizing wizard.

- You chose *Close document*: the document is saved with the status *In Progress*.To continue editing, see *Open* on page 23.

- You chose *Finalize*: you continue with the finalization. See *Finalization* on page 136.

Next Step

Check which of the next steps is configured for your document:

- Selecting a variant (see *Variant* below)

- Editing texts and images (see *Texts and Images* on page 122)

4.3.2 Variant

If you have set up variants for a document, then you select a variant while you create the document. If necessary, you can change the variant again afterwards. The variant can affect the appearance, content, and the editing options in the document.

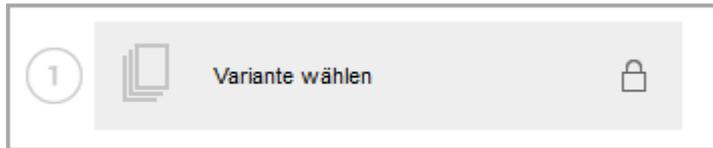**How to Identify Whether You Can Select or Change a Variant**

If you can choose variants for a document, the *Variants* option is listed in the *Setup* area of the *Document* tab in the document editor. Choose [icon] to open the dialog box where you can select or change the variant.

If a document has variables, the step 1 button in the Customizing wizard is displayed as shown in the screen shot below:

The number and icon are displayed in dark gray, an arrow is displayed on the right side of the button, and the message *No variant selected yet* is displayed in red next to the variant.

If you do not need to choose a variant, the button is displayed as follows:

The number and icon are displayed in a lighter color and a lock is displayed on the right side of the button. No information text is displayed. In this case, you can continue editing the next step directly.

What Can Be Changed by Variants

When you choose a variant, you can change the following items:

- *Texts*: in a variant, the designer can change how you can edit texts within it, whether the variable is a text or date variable, and which help tools the designer provides for you. The help tools in this case are the support provided by the designer for editing a text variable (for example, a processing order for the variables, marking a variable as a mandatory field, or check functions such as a recommended text character count).

- *Images*: in a variant, the designer can change the sources from which the images can be selected, whether you can select an image section, and which help tools the designer provides you for editing the image variables. The help tools in this case are the support provided by the designer for editing the image variables (for example, a help text or a specification of whether the original image is allowed or whether you have to process the image variable as a mandatory field).

Where You Choose a Variant

You can choose a variant at two points:

- In the customizing wizard, by opening *Step 1 – Choose variant*.
- When you choose *Step 3 – Edit document* in the customizing wizard, the document editor opens. In the document editor, you can choose a variant in the *Setup* area on the *Document* tab.

Additional Settings

In the template, one variant can be defined as the default variant and is then preset in the picklist. If you want to define a variant as the default variant, select the variant in the picklist and then activate the checkbox *Set as default*. Note that this is not possible with all picklists.

The preview in the customizing wizard may no longer be up to date due to the selection of the variant. To display the latest preview in the customizing wizard, activate the checkbox *Update preview when saving if variant selection is no longer current*. Note that it may take some time to update the preview.

Choosing a Variant

Prerequisite: You have opened the document in the document editor.

1. On the *Document* tab, choose ✎ in the *Setup* area.

   The *Choose variant* dialog box opens. At least one picklist is displayed:
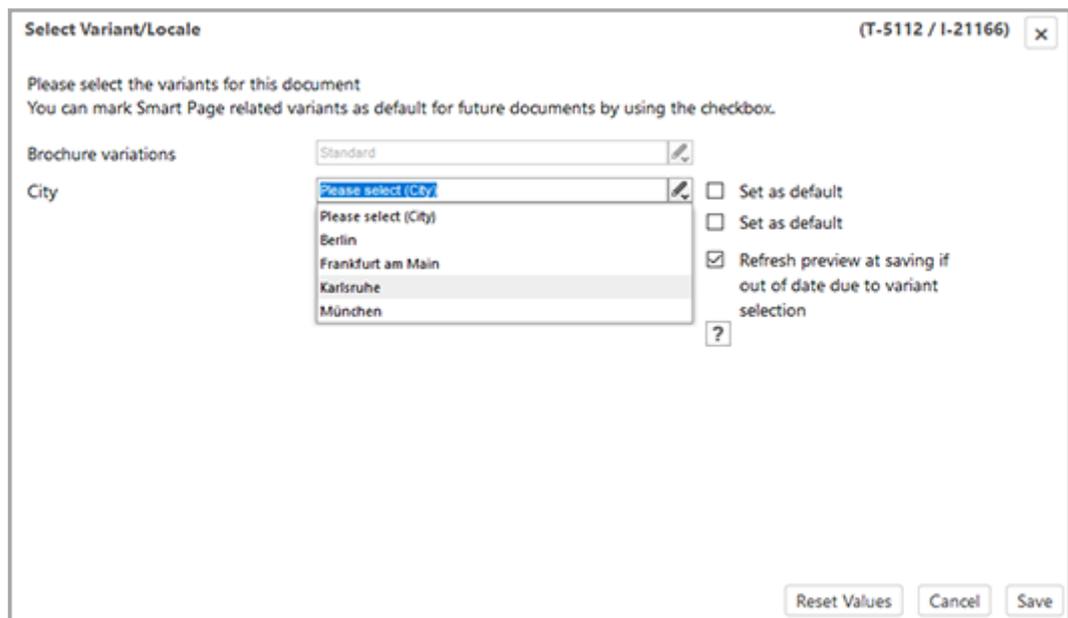
2. Choose a variant from each picklist.
3. If possible: choose a variant as the default for each picklist.
4. Optional: activate the checkbox *Update preview when saving if variant selection is no longer current* if you want to update the preview immediately. Note that it may take some time to update the preview.
5. Click *Save*.

The dialog box closes. You have chosen a variant.

Next Step

In the next step, you edit the texts and images (see *Texts and Images* on the next page).

4.3.3 Texts and Images

In this section, you learn how to edit the texts and images of the document. The template designer chooses which content you can edit and which editing options you can use in the template.

Where You Can Access Editable Content

Open the *Content* tab. If the document contains a variable (that is, an editable text), this variable is displayed. The image below shows a text variable for which you can choose between multiple alternative texts:
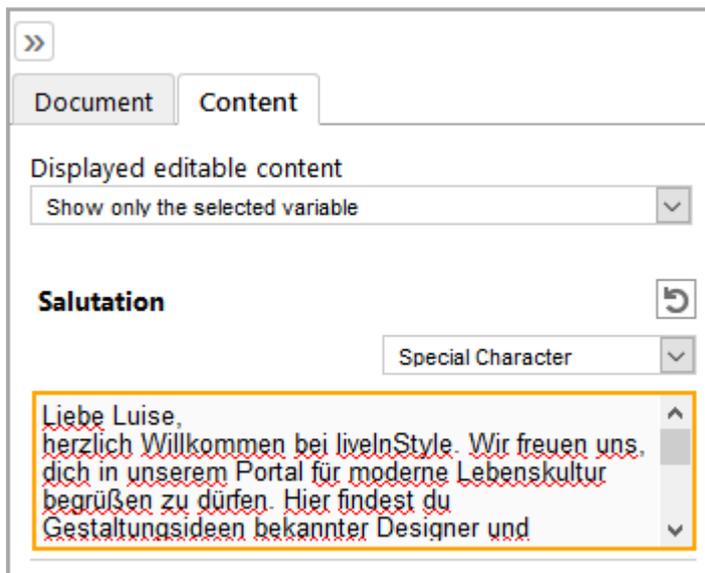
To display different variables, you have several options:

- In the document preview, select a box by clicking its object handle. Its corresponding variables are then displayed. Go through the boxes one after the other.
  If no boxes with a frame are displayed, check whether the *Show Elements* function is activated under *> More Actions > Settings*. If the function is not activated, choose *Show Elements*. Now, check whether any box is displayed with a frame. If no box with a frame is displayed, no editable content is available. In this case, you can finish editing the document.

- If you want to see all variables of a page on the *Content* tab, select *the Show all editable contents on current page* or the *Group editable contents of the current page* entry in the *Displayed editable content* selection list. All the variables are then listed one below the other. Note that the template designer may have deactivated this function under some circumstances. Note that this behavior is different for HTML templates than for INDD templates.

Your Editing Options

The template designer has chosen how you can edit the variables in the template. The following sections describe the different editing options.

> **Note**
>
> Note that the template designer provides you with useful information about the variable in some circumstances. In this case, the [?] icon is displayed next to the variable. When you position the cursor on the [?] icon, the information from the template designer is displayed in a tool tip. Alternatively, help texts are displayed at the bottom of the tab.
>
> If you cannot access any help texts, the [?] icon is not displayed and the help text area at the bottom of the tab does not display any text.

Text

The following editing options are available for text variables:

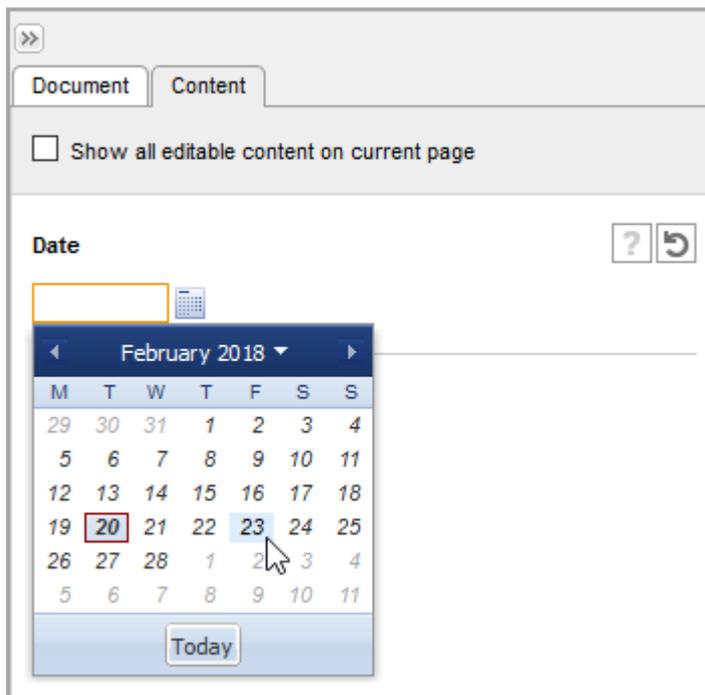| Editing option	Description	Recognizable by
Text entry	You can write the text yourself.	You can enter text in the input field. Formatting functions may be displayed above the input field.
Choice of alternative texts	The template designer specifies alternative texts from which you can select a text.	The *Select alternative text* button is displayed.

You can also combine a text entry and the choice of alternative texts. This means that, for example, you select an alternative text, but can still re-edit or even fully replace it.

Text Editor

To edit a text variable, you can also activate an editor in the template. You can then format the text, for example, by making it bold or italic. The options available in the editor depend on the settings in the template. For more information, see *Text Editor* on page 129.

Date Entry

On the *Content* tab, a date entry may also be required:

Enter your required date directly in the field or click the calendar icon. A calendar opens where you can select a date.

Image

The following editing options are available for image variables:

Editing option	Description	Recognizable by
Choice of different sources	You can freely select images from various sources: • You can upload images yourself. Activate the *Crop image after import* checkbox to edit the image immediately after importing it. If you have access to the *Media Pool* module: • Assets that you can access in the Media Pool • Quick access to assets that you have marked as favorites in the Media Pool • Quick access to assets that you can access through collections in the Media Pool Note: please note that under some circumstances this search returns fewer hits than the direct search in the Media Pool. The reason for this is that a search started from Brand Template Builder has more restrictions (for example, the list includes only assets for which the properties *Print quality* and *Suitable for Brand Template Builder* are activated).	The *Add Assets* button is displayed. Images from the Media Pool may also be displayed.
Choice of alternative images	The template designer specifies alternative images from which you can select an image.	In addition to the original image, at least one alternative image is displayed.

The choice of different sources and choice of alternative images can also be combined.

Selecting an Image Section

The template designer may give you the option of selecting a section of the image. In this case, the 🖉 button is displayed on the previews for the images. If you click the button, the *Crop Image* dialog box opens. For more information, see *Selecting an Image Section* on page 131.
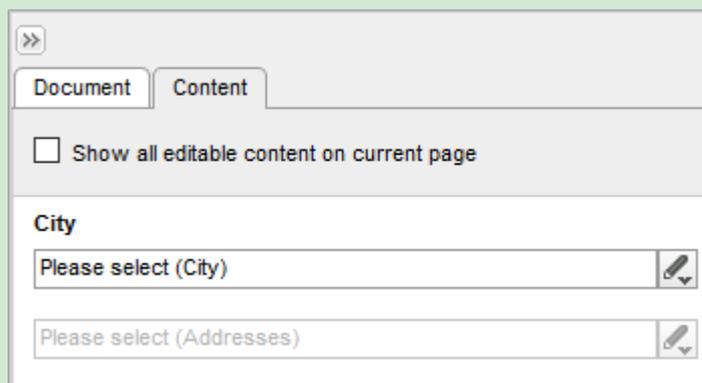
Picklists

Picklists can also be displayed on the *Content* tab. The template designer uses picklists to provide you with centrally managed texts and images.
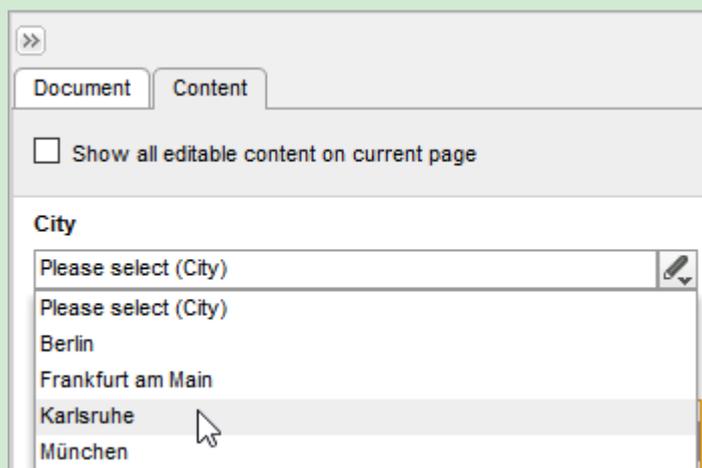
EXAMPLE

A brochure contains a field in which the address of the affiliate that creates and publishes the brochure is to be printed. The addresses of all the affiliates are managed in the system. The template designer has therefore linked the centrally managed data with the address field.

In the document editor, two picklists are displayed on the *Content* tab. The lists cascade (that is, the display of the second list is dependent on the selection in the first list). The second picklist is therefore grayed out until you have made a selection in the first list:
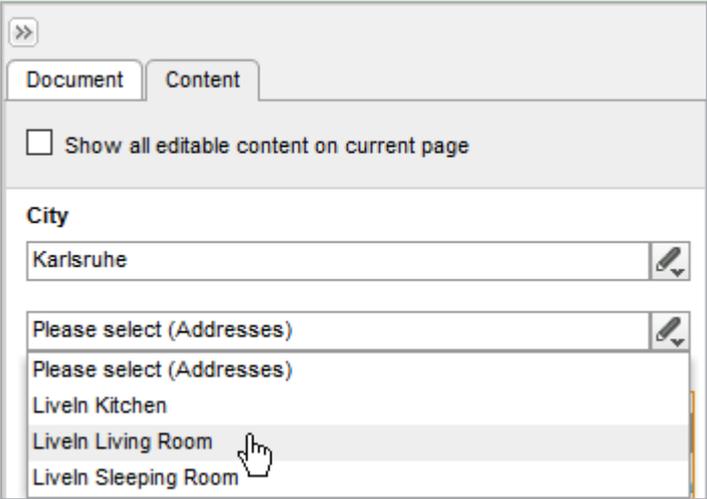

In this example, there are multiple affiliates in each city. To ensure that you do not need to select the affiliate in an unclear and long list, first select the city in which the affiliate is located:

Then, choose an affiliate in the selected city in the second picklist:

>
>
> The address data for the selected affiliate is automatically written to the assigned variables and can also be viewed in the document preview after you refresh it.

Usually, you cannot see the corresponding variables on the *Content* tab. If you can, the template designer may have allowed you to re-edit the data.

Note the following points:

- Instead of two picklists, you may see more cascading lists, lists that are independent of each other, or only one list on the *Content* tab in some circumstances. This depends on your use case.

- If only the content of a variable is dependent on the picklist, the picklist may be displayed directly next to the variable.

> **Note**
>
> Note that the display of entries in lists may depend on the affiliate IDs that are selected for you. As a result, when you edit documents based on the same template, you may see different entries if you are assigned different affiliate IDs during editing.

Relationship Between Variables on the *Content* tab and Boxes in the Document

In the case of an HTML document, there are variables that are equivalent to the boxes in the document preview. There may also be variables without a corresponding box in the preview (for example, if you are working with an HTML attribute

or on animated banner). You may also not be able to identify a relationship between the variables and the changed boxes:

> **EXAMPLE: THE CONTENT IS CALCULATED BY A FORMULA.**
>
> For this purpose, you enter values in one or more variables (for example, a discount in %). If configured accordingly, Brand Template Builder calculates the content for one or more boxes (for example, a discounted price).

If you do not understand the relationships, use the [?] icon to see the tool tips that the template designer provides for you. If this information is insufficient, contact the template designer.

Next Step

In the next step, you prepare for publication in the Media Pool module (see *Preparing for Publication in the Media Pool Module*).

4.3.3.1 Text Editor

To edit a text variable, you can also activate an editor in the template. You can then format the text, for example, by making it bold or italic. The options available in the editor depend on the settings in the template.
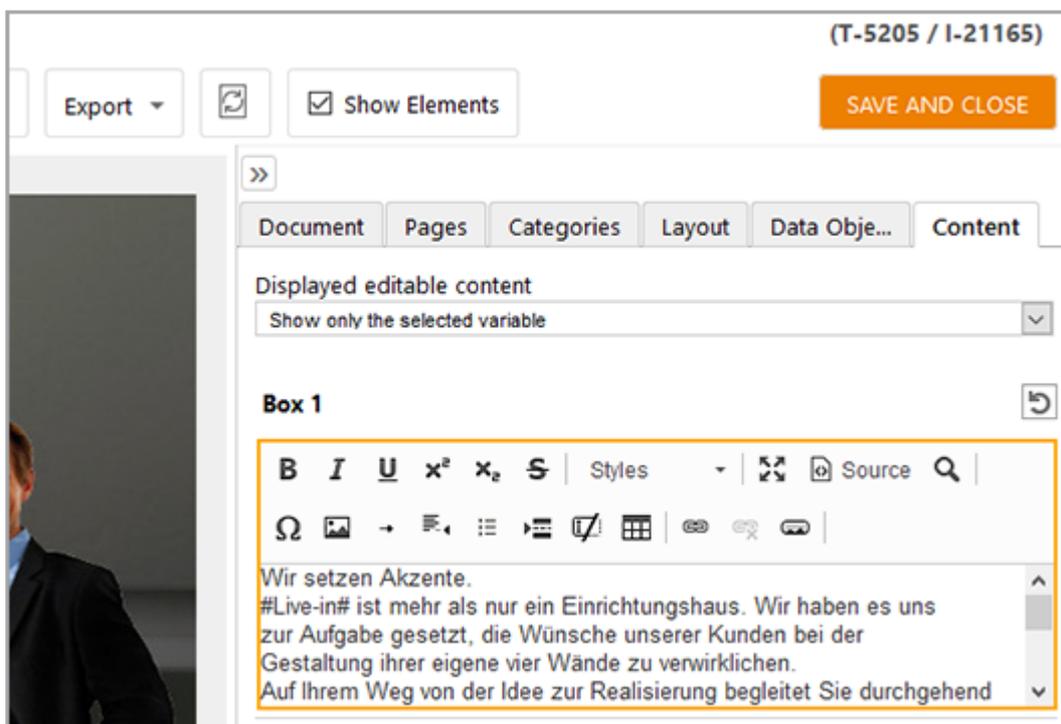
Available Functions

The template designer can give you access to the following functions, among others:
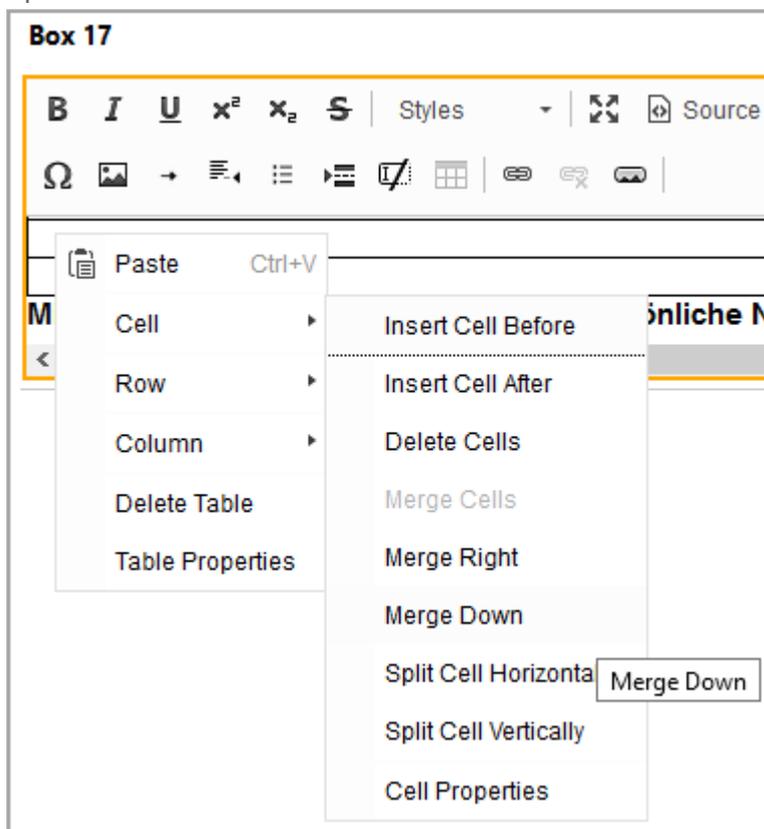
- *Text formatting*: bold, italics, underline, subscript, superscript, and strikethrough

- *Objects*: special characters, bullet points, links, images, media links

- *Tables*: click the ⊞ button to add a table. A dialog box opens where you can enter the basic table properties such as the number of rows and columns. Choose *OK* to add the table. You can edit the table directly. Right-click the table to open the context menu, where you can access additional editing options:

- View options: display as a source text, maximize, restore the editor

- Search/replace

- Clipboard: add content from MS Word

- Links: The editor offers you the possibility to open a link in a new browser window. To do this, use the context menu by right-clicking on the link or click on the link while holding down the CTRL/CMD key.

Most of the functions are represented with icons that are based on conventional images. However, if you do not understand the function behind any icon, set the cursor on the icon. The function is then displayed in a tool tip.

> **Note**
>
> Note that the template designer usually provides you with a selection of these functions based on how you are supposed to edit the variable. The options provided therefore vary from document to document and in some circumstances even from variable to variable.

### 4.3.3.2 Selecting an Image Section

The template designer may give you the option of selecting a section of the image. In this case, the ✎ button is displayed on the previews for the images. If you click the button, the *Crop Image* dialog box opens.

> **Note**
>
> You only change the size of the visible section of the image. The actual image box is not affected. Its size is defined in the template.
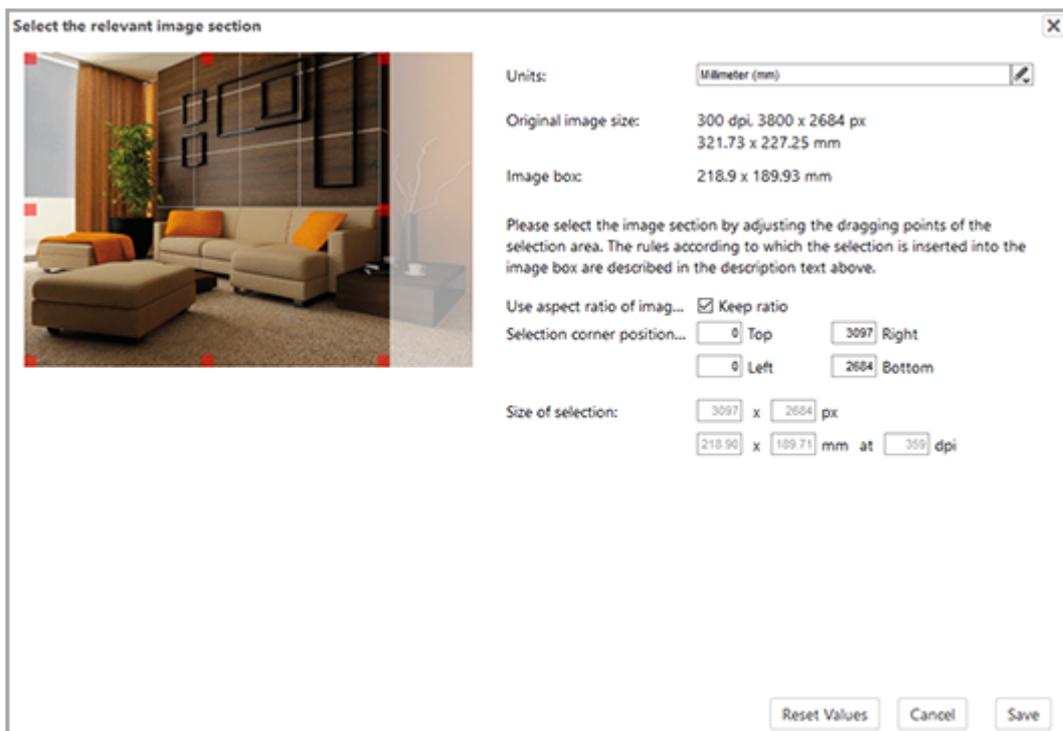
First, select the length unit in which you want to set the image section in the top list: millimeter, centimeter, or inch. The size of the original image is displayed below that. The preview displays a frame with the image section that is currently set. The frame is initially the maximum possible size.

Move the frame on the image and use the drag point to change the size until you have selected your desired section.

If you want to change the aspect ratio, select an appropriate size. Note that the size of the space required in the document may change as a result. Therefore, test the setting: leave the *Crop Image* dialog box and refresh the view. The box now displays the new sections.

Choose *Save* to confirm your selection and return to the document editor.

4.3.4   Preparing for Publication in the *Media Pool* Module

You can manually download a finished HTML document and publish it manually at any time. The template designer can also allow you to publish the finished document directly in the *Media Pool* module. Other users can use this module to search for and download the document in the system.

How You Know that You Can Publish the Document in the *Media Pool* Module

If you can publish the finished document directly to the *Media Pool* module, the *Step 3 - Publish in the Module Media Pool* button is displayed as follows in the customizing wizard:
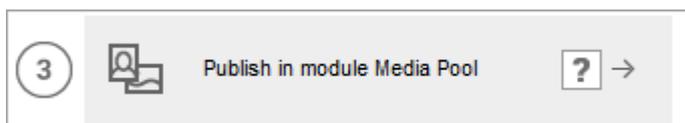
If direct publication is not possible, the button is grayed out.

Specifications for Publication in the *Media Pool* Module

If you are publishing a document in the *Media Pool* module, you create it as an asset. To do so, you must enter the required meta data for the asset. If you click the button *Step 3 - Publish in Module Media Pool* in the customizing wizard, the following dialog box is displayed:

Edit the fields. For a detailed description of the meta data, see the user manual for the *Media Pool* module (see *Additional Documentation* on page 191).

In addition, note the following special features of meta data in Brand Template Builder:

Metadata	Description
Validity and *Hide if not valid*	If a validity date has been defined in the document properties, the *Validity* field is prefilled with this date and the *Hide if not valid* checkbox is activated.
Save data of form without publishing	If you activate the *Save data of form without publishing* checkbox, the data for the document is saved. However, the document is not published in the Media Pool. This procedure may be required, for instance, if you are editing the copy of a document that is already published in the Media Pool but do not want to publish the copy.

> **Note**
>
> In this dialog box, you only prepare for the publication in the *Media Pool* module. The document is not published in the *Media Pool* module until you have finished the document in step 4 of the customizing wizard.

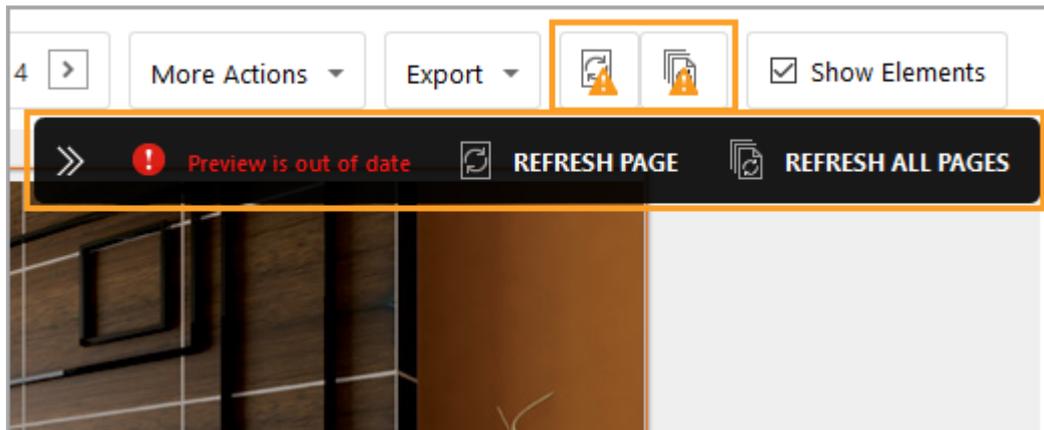## 4.3.5 Refreshing the Document Preview

When the document is changed, the preview in the document editor must be refreshed. It can be updated refreshed with a real-time preview or manually, depending on the template on which your document is based. There is a distinction between the following situations here:

The Real-Time Preview is Available in Your Document

If the real-time preview is available in your document, the ⟳ icon is displayed in the document editor formula bar. If you click the button, the real-time preview is refreshed and all changes are applied automatically.

The Real-Time Preview is Not Available in Your Document

If the real-time preview is not available in your document, the document editor shows that the view does not indicate the editing status in the editing bar and in a black overlay:
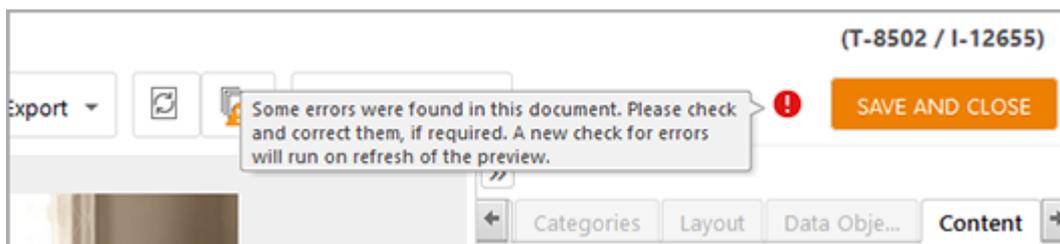
You can trigger the page refresh either in the formula bar or overlay, and can also do so for all of the pages if the INDD document has multiple pages. If you click the arrow keys in the overlay, the overlay is minimized to a red exclamation point.

4.3.6   Finishing or Pausing Editing

If you finish customizing the document or want to continue editing the document later, choose *Save and Close* in the top right corner of the document editor.

If you cannot finalize your document yet, an exclamation mark is displayed next to the Close button.

In this case, Brand Template Builder has detected errors in the document:
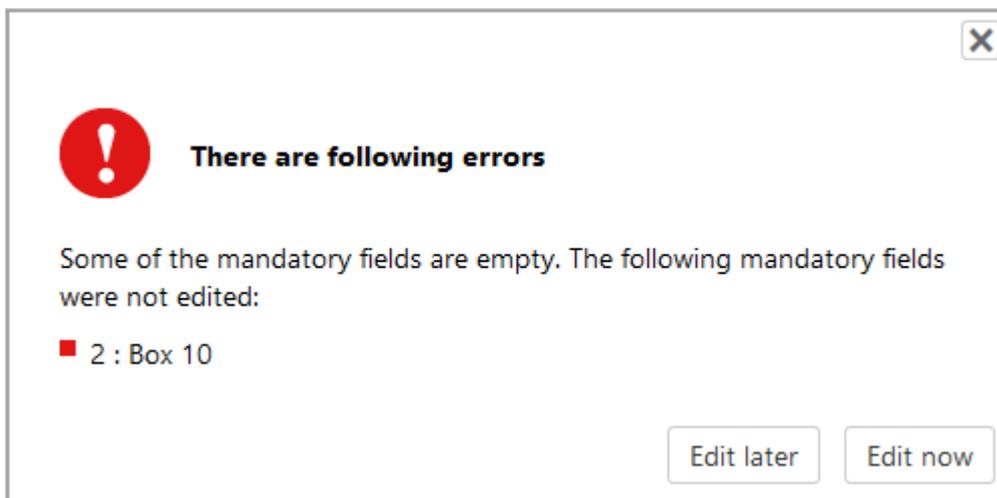
Possible Errors

Before the document is closed, the following issues are checked:

- Mandatory variables: have all mandatory variables been filled in (text and image variables)?
- Boxes with rules: does the entered content comply with the rules?
- Text box with date: does the date format meet the provisions for the locale?
- Smart Grid: is the data from Marketing Data Hub up to date?

- Number of pages: is the number of pages between the defined minimum and maximum numbers?

- Divisibility of the number of pages: can the number of pages be divided up as specified?

- Rotated boxes: do the rotated boxes comply with the permitted angles?

- Document size: does the size of the document comply with the defined dimensions?

The results of the validation are displayed in a dialog box that opens.

If data is no longer up to date and you have configured the document template to check that data is up to date, a table with the changed data is also displayed. Choose which data is displayed in the document.

Choose *Cancel* to return to the document and resolve the errors. Choose *Complete later* if you want to save the document with the errors and resolve the errors at a later time.

Next Step

If you have finished or paused document editing in the document editor, the document is displayed in the customizing wizard. If you now want to continue editing, follow the descriptions in the next chapters. If you also want to leave the customizing wizard, click one of the buttons below:

- *Close document*: the document is saved with your changes with the status *In Progress*. If you want to continue editing the document later, search for and open it (see *Open* on page 23).

- *Close and delete*: the document is closed and then deleted.
  Attention! You cannot reverse the deletion.

4.4 Finalization

When you have completed all the necessary steps for customizing the document, finish editing the document by finalizing it. During finalization, you check the document one last time. An automated check by Brand Template Builder also ensures that you have completed all the necessary steps or that all the required information, such as a delivery address for printing an INDD document, is available.

The following chapters describe finalizing separately by document type:

- *Finalize INDD and HTML documents* below
- *Finalize online document* on the facing page

4.4.1 Finalize INDD and HTML documents

To do this, click the last step in the Customizing Wizard. For INDD documents this is step 6, for HTML documents it is step 4. After finalizing, the document can no longer be changed.

If applicable, the template is set up in such a way that you have to request a release in order to finalize the document. When a release is requested, the document is reviewed by at least one or possibly more users in the system. The reviewers can release or reject the document.

Procedure

If you have not yet assigned a title for the document, the *Edit Document Properties* dialog box opens first. Enter the following data:

- Document name
- Optional and if used in your system: Affiliate
- Locale
- Validity

Click *Save* to confirm the entries and close the dialog box.

The document is then opened in the document editor. You can switch between the individual pages of the document or zoom in on the page view to check the edited content elements. Now it is also checked whether you have completed all the necessary steps in the Customizing Wizard or whether all the required information, such as a delivery address, is available. In the right pane, a note informs you about the successfully completed check.

Finalize without approval

If you do not need to request approval, the *Finalize* button will be displayed directly. Check the document and then click *Finalize*. Then the document editor is closed and the start page of Brand Template Builder is opened. If necessary, the document will be printed according to your settings or published in the *Media Pool* module. You can access the finalized document under > *Manager > Documents* in the *Finalized (only own documents)* section .

Finalize with approval

If you need to request an approval to finalize the document, the *Request approval* button will appear in the Document Editor. Review the document and enter a comment for the approver(s) if needed. Select the approvers from the drop-down lists for each workflow step. Click *Select other organizational unit* to be able to select approvers from another department, for example.

> Note
>
> The approval steps to go through are determined by your system admin-
> istrator and the designer.

Then click *Request approval*. Subsequently, the approvers are informed about their tasks. Click > *Manager > Approvals > Documents* in the navigation bar to find out about your approvals. Expected approvals, received approvals and not received approvals are listed. If you can give approvals yourself, current approval requests are listed, as well as those you have approved and rejected. If the designer has enabled this in the template, the approver and requestor can discuss with each other during the approval process. In this case, you can reach the function > > *Add comments in the requests.*

When the document is approved, you can reach the finalized document under > *Manager > Documents* in the *Finalized (only own documents)* section.

4.4.2   Finalize online document

If you were able to save an online document without errors, you can also finalize it. After finalizing, the document can no longer be changed. Check all the components that are displayed on the various tabs in the editor. Then click *Finalize*.

Management

5

This section describes the management tasks for you as a document creator in Brand Template Builder:

- *Saving a Template as a Favorite* on the facing page: to quickly find templates that are frequently needed again, mark the template as a favorite. This action is available only for INDD and HTML documents.

- *Searching for, Copying, and Adapting a Document* on page 20: you can copy the existing document and create a new document based on the copy. This action is available only for INDD and HTML documents.

- *Archiving a Document* on page 142: You archive the document. By archiving, you mark the document as no longer valid. However, the document is not deleted, but can be reactivated if required. You can only archive finalized documents.

- *Reactivating a Document* on page 143: You reactivate an archived document. By reactivating an archived document, you make it available to the document creators again.

- *Deleting a Document* on page 144: you can regularly delete documents that are no longer required to keep your overall inventory in Brand Template Builder up to date.

5.1   Saving a Template as a Favorite

> 📄 Note
>
> This action is only valid for INDD and HTML documents.
> It is currently not possible to save an online document as a favorite.

To quickly find a template that is frequently needed again, mark the template as a favorite. To do so, search for the template and choose ☆ in the hit list. You can then quickly open the template by choosing *> Manager > Templates > Favorites* and create a new document based on it.

5.2   Archiving a Document

By archiving, you mark the document as no longer valid. However, the document is not deleted, but can be reactivated if required. You can only archive finalized documents.

1. Click *> Brand Template Builder > Documents*.

2. Search for the document you want to archive.

3. Click at the document *> ⋮ > Archive*.

You have archived the document.

You can also search and archive INDD and HTML documents under *>Brand Template Builder > Manager > Documents* or *>Brand Template Builder > Manager > Documents > Categories*. Click at the document > ➡️ *> Archive*.

5.3   Reactivating a Document

By reactivating, you make an archived document available to the document creators again.

1. Find the archived document that you want to reactivate:

    - Click *> Brand Template Builder > Documents* and search in the archived documents, see *Searching in Your Documents* on page 159.

    - Click *> Brand Template Builder > Manager > Documents* and search for the document using the advanced search, see *Documents* on page 163. Note that you can only reach INDD and HTML documents this way.

2. Click at the document you want to reactivate, > *⋮* or > ➡ > *Reactivate*.

You have reactivated the document. The document has the status *Finalized* again and can be used for document creation.

5.4 Deleting a Document

> **Attention**
>
> You cannot reverse the deletion of documents.

Delete a document

1. Click > *Brand Template Builder > Documents*.

2. Search for the document that you want to delete.

3. Click on the document > ⋮ > *Delete*.

You have deleted the document.

You can also search and delete INDD and HTML documents under *>Brand Template Builder > Manager > Documents* or *> Brand Template Builder > Manager > Documents > Categories* . Click the trash icon on the document.

Delete several documents

1. Search the documents you want to delete in *>Brand Template Builder > Documents*.

2. Select the documents you want to delete:
    - If you want to delete all documents in the search result, click above the search result *Select All*.
    - If you want to delete a part of the displayed documents, check the checkboxes of the documents you want to delete.

3. Click above the search result *> Menu > Delete*.

    A confirmation prompt is displayed.

4. Click *Delete*.

You have deleted the documents.

Distribution

6

Brand Template Builder helps you to share documents at various points:

- *Download* on the facing page: you can download the document and open it or save it locally.

- *Sending a Document as an E-Mail* on page 148: you send the document either as an attachment or using a download link. This action is available only for INDD and HTML documents.

- *Reprinting* on page 150: you can reproduce a print document (that is, have it printed). This action is available only for INDD and HTML documents.

- *Publication in the Media Pool* on page 151: if you publish a document in the Media Pool, all *Media Pool* module users with the appropriate access rights can access the document. This action is available only for INDD and HTML documents.

- *Publication in the Marketing Planner* on page 153: here, you link the document with a planning element in the Marketing Planner module. Marketing Planner users see the document as an attachment to a planning element. A planning element may represent a campaign or a channel, for example. This action is available only for INDD and HTML documents.

6.1 Download

You can download the document and open it or save it locally. You can download documents with the status *In Progress* and finalized documents.

Options

When downloading INDD documents, you can select the output format and – if configured accordingly – choose the page order in the advert as individual pages or printed sheets. The output formats that are available depend on the settings in the template. If you select the output format *Original format (Adobe InDesign)*, you can also decide whether the images are also downloaded. If you activate the *With images* checkbox, a ZIP file containing the INDD file and all linked images is downloaded.

When downloading an INDD document with the status *In Progress*, note that only low-resolution output formats can be selected. This is a safeguard to ensure that only finalized documents can be printed.

Online documents are downloaded as a ZIP file. The ZIP file contains a directory for each format created in the template. In this directory, the document is saved in the output format as an image file. The designer specifies in the template which output formats are possible.

HTML documents are downloaded as a ZIP file.

Downloading a Document

1. Search for the document that you want to download. See *Documents* on page 163.

2. Choose:

   - Under > *Brand Template Builder > Documents*: > ⋮ > *Download*.

   - Under > *Brand Template Builder > Manager*: > ⬇. This action is available only for INDD and HTML documents.

   INDD documents: the *Download* dialog box is displayed.

   a. Choose the output format and the page order. For the output format *Original format*, decide whether the linked images are also downloaded.

   b. Click *Download*.

The document is downloaded. Your browser may display a dialog box in which you specify whether you want to save or open the document.

6.2 Sending a Document as an E-Mail

You send the document by e-mail either as an attachment or using a download link. You can send both documents with the status *In Progress* and finalized documents by e-mail.

> **Note**
>
> This action is only valid for INDD and HTML documents.
> It is currently not possible to send an online document by e-mail.

Options

Like when you download INDD documents, you can select the output format and the page order. If you select the output format *Original format (Adobe InDesign)*, you can also decide whether the images are sent along with the file. If you select the *With images* checkbox, a ZIP file containing the INDD file and all linked images is sent.
For INDD documents with the status *In Progress*, only low-resolution output formats can be selected. The output formats that are available depend on the settings in the INDD template.

For the e-mail dispatch, you specify whether you want to send a copy to yourself. You can also send the document either as a link or as an attachment.

You can use a suggestion list to select system users as recipients. However, you can send the e-mail to any e-mail address.

Sending a Document by E-Mail

1. Search for the document that you want to send by e-mail. See *Documents* on page 163.

2. Choose:

   - Under *> Brand Template Builder > Documents*: > ⋮ > *Send as e-mail*.

   - Under *> Brand Template Builder > Manager*: > @ .

   The *Send by E-Mail* dialog box opens.

3. Choose the output format and the page order. For the output format *Original format*, decide whether the linked images are to be sent with it.

4. Enter the recipients, in a CC or BCC if necessary.

5. Enter a subject and a message.

6. Choose whether to send a copy of the e-mail to yourself.

7. Choose whether the document is accessible by link or is sent as an attach-ment to the e-mail.

8. Choose *Send*.

The document is sent by e-mail.

6.3 Reprinting

You can reproduce a print document (that is, have it printed).

> 📄 Note
>
> Reprinting triggered by Brand Template Builder is available only for INDD documents that are based on templates in which this function is enabled.

How You Know That You Can Reprint a Document

The following characteristics indicate whether you can reprint a document:

- Under > Brand Template Builder > Documents: in the ⋮ menu, you can access the *Print* function.

- Under > *Brand Template Builder > Manager > Documents*: in a hit list, the 🖶 icon is displayed next to the document.

Note that you can reprint only finalized documents.

Options

For information about the options for producing the document, see the section *Print Order* on page 105.

Reprinting a Document

1. Search for the document that you want to reprint. See *Documents* on page 163.

2. On the document, choose:

   - Under > *Brand Template Builder > Documents*: > ⋮ > *Print*.

   - Under > *Brand Template Builder > Manager*: > 🖶.

   The *Print Order* dialog box opens.

3. Choose the output format and the page order.

4. Specify the details for the printout (see *Print Order* on page 105).

5. Choose *Send*.

Production is started.

6.4 Publication in the Media Pool

If you publish a document in the Media Pool, all *Media Pool* module users with the appropriate access rights can access the document. Note that this function is available only for finalized documents.

> **Note**
>
> This action is only valid for INDD and HTML documents.
> It is currently not possible to publish an online document in the Media Pool.

Options

If you are publishing a document in the *Media Pool* module, you create it as an asset. To do so, you must enter the required metadata for the asset in the dialog box below.

Edit the fields. For a detailed description of the meta data, see the user manual for the *Media Pool* module (see *Additional Documentation* on page 191).

In addition, note the following special features of meta data in Brand Template Builder:

Metadata	Description
Validity and *Hide if not valid*	If a validity date has been defined in the document properties, the *Validity* field is prefilled with this date and the *Hide if not valid* checkbox is activated.
Suitable for Brand Template Builder	To enable the use of the document published in the Media Pool as the basis for a template in Brand Template Builderh again, activate the *Suitable for Brand Template Builder* checkbox.
Print quality	Activate the *Print quality* checkbox to confirm that the asset is available in high resolution and is suitable for printing.
Save data of form without publishing	If you activate the *Save data of form without publishing* checkbox, the data for the document is saved. However, the document is not published in the Media Pool. This procedure may be required, for instance, if you are editing the copy of a document that is already published in the Media Pool but do not want to publish the copy.

Publishing a Document in the Media Pool

1. Search for the document that you want to publish in the Media Pool. See *Documents* on page 163.

2. Choose:

   - Under > *Brand Template Builder > Documents*: > ⁝> *Publish*.

   - Under > *Brand Template Builder > Manager*: > ➡ > *Publish*.

   The *Publish document in module Media Pool* dialog box is displayed.

3. Edit the metadata.

4. Click *Save*.

The document is published as an asset using the entered metadata.

6.5   Publication in the Marketing Planner

When you publish a document in the Marketing Planner, you link the document with a planning element in the *Marketing Planer* module. Marketing Planner users see the document as an attachment to a planning element. A planning element may represent a campaign or a channel, for example. Note that this function is available only for finalized documents.

> **Note**
>
> This action is only valid for INDD and HTML documents.
> It is currently not possible to publish an online document in Marketing Planner.

> **Note**
>
> Note that the selected year is a crucial factor when selecting the planning element. The document is displayed for Marketing Planner users only for the year selected.

Publishing a Document in the Marketing Planner

1. Search for the document that you want to add to a planning element as an attachment. See *Documents* on page 163.

2. On the document, choose:

   - Under *> Brand Template Builder > Documents*: *> ⋮ > Transfer to Marketing Planner*.

   - Under *> Brand Template Builder > Manager*: *> ➡ > Transfer to Marketing Planner*.

   A dialog box opens.

3. Select the year for which you want to add the document to a planning element as an attachment.

4. Choose:

   - You want to add the document to an existing planning element as an attachment:

     a. Select the planning element in the tree structure.

     Or:

- You want to add the document to a new planning element as an attach-ment:

  1. Select the higher-level planning element in the tree structure.

  2. Choose *New Subelement*.

     The *New element name* dialog box is displayed.

  3. Enter the new element name.

  4. Choose *OK*.

     The new subelement is created.

  5. If necessary, repeat steps a to d to create additional subelements.

  6. In the tree structure, select the planning element to which you want to add the document as an attachment.

5. Choose *Attach*.

The document is added to the planning element as an attachment.

Interface

7

This section explains the most important interface elements in the Brand Template Builder module for you.

- *Start and Navigation* on the facing page: after logging into the BrandMaker system, click Brand Template Builder in the upper navigation pane. Convenient search options are available to assist you immediately on the start screen.

- *Searches* on page 159: this section explains the search functions in the Brand Template Builder module for you.

- *Hit list* on page 166: the results of your searches are output in a hit list.

- *Detailed View* on page 171: the detailed view lists the detailed information about a template or document (for example, a document preview, the advertising material ID, the ID of the template used, the custom objects, and other document properties).

- *Customizing* on page 173: customizing is a tool for creating documents for specific purposes, such as brochures or adverts. Brand Template Builder provides multiple interface elements for this task.

7.1 Start and Navigation

After logging into the BrandMaker system, click Brand Template Builder in the upper navigation pane to open the module. Convenient search options are available to assist you immediately on the overview screen.
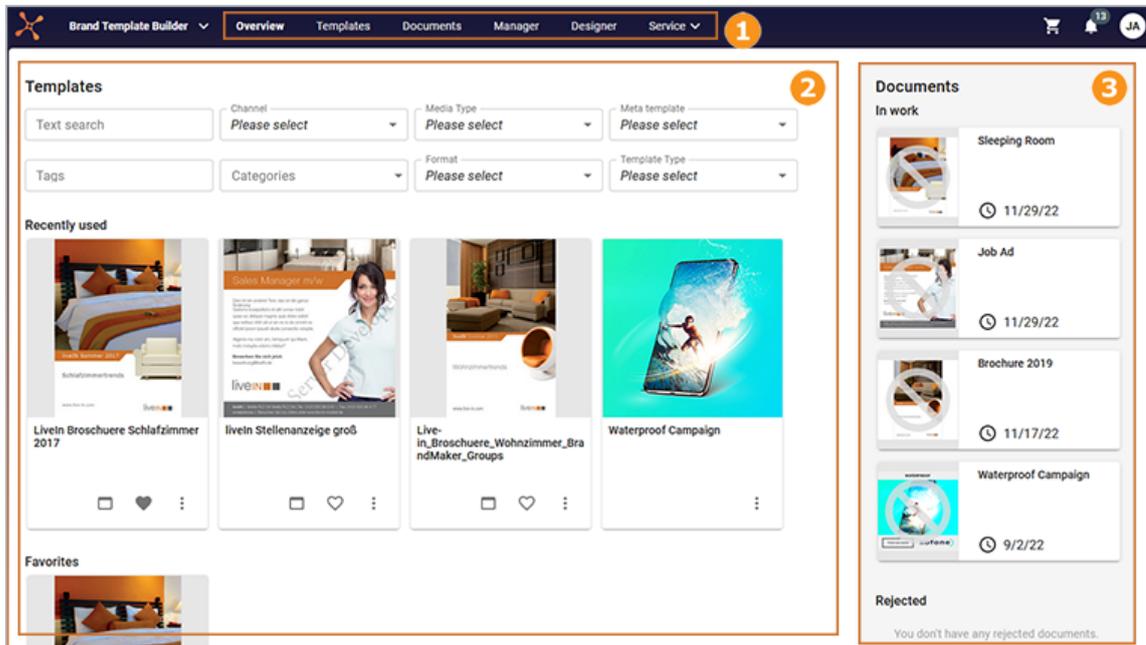
You can navigate through the module using the top pane (**1**). Below it, you can access a variety of templates (**2**). On the right-hand side, you can access some of the documents that you have created (**3**).

Navigation **1**

To ensure you can work efficiently with Brand Template Builder, you can access the most important areas from the main navigation pane.

Area	Description
Overview	The module home screen. See the sections below.
Templates	Search page for templates
Documents	Search page for your documents
Manager	You can access templates and documents here. You can also manage approval requests for documents and templates under *Approvals*. In the *Reports* area, you can generate reports about the use of the module (for example, a list of the templates used most often).

Area	Description
Designer	You create templates in this area. The area can be used only by designers with the appropriate authorizations and is therefore described in the Brand Template Builder administration manual (see *Additional Documentation* on page 191).

Templates ②

In the Templates area, you can search for templates directly and access templates from the following categories:

- *Recently used*: Access the last five templates that you used to create a document.

- *Favorites*: Access the last five templates that you marked as favorites.

- *New Templates*: Access the five last templates that you created.

Documents ③

In the Documents area, you can access the four most recently used documents with the following statuses:

- *In Progress*: Documents that you have not yet finished editing.

- *Rejected*: Documents that were not approved.

- *In Approval*: Documents that are still in the approval process.

- *Finalized*: Completed documents

- *Archived*: Archived documents

7.2   Searches

Brand Template Builder has multiple search functions:

7.2.1   Searching in Your Templates

You can browse your templates under > *Brand Template Builder > Templates*. Enter your search criteria in the displayed properties. The search results are displayed in the area below that.

Associated Tasks

7.2.2   Searching in Your Documents

You can search through your documents under > *Brand Template Builder > Documents*:

Use the picklist to restrict the search to documents with specific statuses: all your documents, *In Progress*, *Finalized*, *In Approval*, or *Rejected*. To restrict the result further, enter search criteria in the displayed properties. The search results are displayed below that.

Associated Tasks

7.2.3   Quick Search for Templates

Under > *Brand Template Builder* > *Manager* > *Overview*, enter a search term in the search field. Click *Search* to start a global search. In the Advanced search dialog box, you use the *Global search* field.

> **Note**
>
> This action is only valid for INDD and HTML documents.
> It is currently not possible to search for an online template in this interface.

Overview

Quick Search for Templates

| | Search | ▶ Advanced Search |

Search Strings

Note that the search is not case-sensitive.

Search	Example	Search results
For parts of words	`tree`	Apple *tree*, Pear *tree*, *Tree*house

For several terms	`important document`
	
	or
	
	`important, docu-`
	`ment`
		The *document* is *important*
		
		An *importantdocument*

For an exact phrase	`"an important"`	*An important* document

Search	Example	Search results
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

7.2.4 Advanced Search

The advanced search lets you search for specific fields or properties, such as tags or names. Note that the advanced searches for templates and documents are different. You can access the advanced search for templates under *> Brand Template Builder > Manager > Templates > Search* (see *Templates* below). You can access the advanced search for documents under *> Brand Template Builder > Manager > Documents* (see *Documents* on page 163).

> **Note**
>
> This action applies only to INDD and HTML documents.
> It is currently not possible to find an online document using the advanced search.

7.2.4.1 Templates

The screen shot below shows the advanced search for templates:

Click *Search* to start the search. Click *Reset* to clear all search fields by deleting all entries.

Search Criteria

You can enter search terms into the following fields:

Field	Description
Full text search	You search the following fields or properties simultaneously for the entered search term: • Template ID • Template name • Tags • Categories • *Asset ID in M*edia 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 specific meta-template, you must enter the complete ID (for example, "MT-999").
Virtual data-base	You can search for a template in the selected virtual database.
Item number	You enter the media object item number in the Media Pool. The search lists the templates that are based on the media object.
Format	You can search for templates created in a specific format such as DIN A4 or DIN A2.
Color	You can search for templates that are created in a specific color setting such as CMYK or RGB.
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.

Field	Description
Units	Specify the units in which you have entered the dimensions: • Millimeter (mm) • Centimeter (cm) • Inch (in)
Output method	You can search for templates that have been created for a specific printing method.
Valid from	You can search for templates that are valid after or on the specified day.
Valid to	You can search for templates that are valid before or on the specified day.
Also search sub-categories	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.
Show archived documents	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.
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.

7.2.4.2 Documents

The screen shot below shows the advanced search for documents:

Click Search to start the search. Click Reset to clear all search fields by deleting all entries.

Search Criteria

You can enter search terms into the following fields:

Field	Description
Full text search	You use this field to search several fields or properties for the entered search term at the same time. When you enter a character, the auto-complete shows a proposal list with search terms from the following properties of documents that you can access: the *title*, *document ID*, *categories*, and *tags*.
Tags	You can search for documents with a template in which the search term is defined as a tag in the properties.
Dimensions	You can search for documents by specifying the width x height.
Units	Specify the units in which you have entered the dimensions: • Millimeter (mm) • Centimeter (cm) • Inch (in)
Format	You can search for documents with a corresponding template that is currently created in a specific format such as DIN A4 or DIN A2.
Color	You can search for documents whose corresponding template is currently created in a specific color setting such as CMYK or RGB.

Field	Description
Pers.date from	You can search for documents that were created on or after the specified day.
Pers.date until	You can search for documents that were created before or on the specified day.
Name	You search for the name of a document.
Document ID	You can search for the unique identification number (ID) of the document. You can enter the ID in the field with or without the prefix "I-".
Affiliate ID	You can search for documents that are assigned to a specific affiliate ID.
Also search sub-categories	Activate this checkbox to include nested category trees in the search in their entirety.
Show invalid documents	Activate the checkbox to also find documents that are not valid at the time of the search.
Show archived documents	Activate the checkbox to also find documents that are archived at the time of the search. If you do not activate this checkbox, you can only find non-archived documents.

Displayed Detailed Search

Field	Description
Item number	You enter the media object item number in the Media Pool. The search lists the documents with a template that is based on the media object.
Virtual database	You can search for a document in the selected virtual database. Note that a document is always saved in the same VDB as the template.
Output method	You can search for documents with templates in which the output method is currently activated for document output.

7.3 Hit list

The results of your searches using the quick search for templates and the advanced search are displayed in a hit list.

> **Note**
>
> This action is valid only for INDD and HTML documents.
> It is currently not possible to reach an online document in a hit list.

Sorting and Navigation

You can sort the entries in the hit list in ascending or descending order in accordance with the following criteria:

- Date
- Format
- Name

If the hit list has multiple pages, you can use the arrow symbols to scroll forwards and backwards.

Displayed Information

In addition to a preview image of the templates or documents found, the hit list displays other information including:

- Name (as a link to the detailed view)
- ID number
- Format
- Dimensions
- Color model
- Page count
- Assigned categories
- Creation date and creator
- Virtual database (VDB)

- Validity

- Status (for example, *In Progress* or *In Approval*)

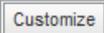- *Published* status, if the document is published in the Media Pool

> 📋 **Note**
>
> You can search within a hit list and apply further restrictions to it. For example, you can restrict a hit list that you generated from the category tree by searching for a specific keyword.

Functions

You can edit templates and documents directly from the hit list. You can call up the following functions by clicking the buttons:

Button	Description
Edit	Note: only visible for templates! This opens a dialog box in which you can edit the metadata of the selected template.
Customize	Note: only visible for templates! You can create a new document based on the selected template. You open the customizing wizard, in which you can then edit the document. For more information, see *Searching for and Using Templates* on page 17.
▤	This opens the detailed view of the selected document or template.

Button	Description
☆	Note: only visible for templates! You add the selected template to your favorites. Click > *My Favorites* in the left-hand navigation bar to call up a hit list of your favorites. For more information, see *Searching for and Using Templates* on page 17.
🗑	This deletes the selected document or template. **Attention! Data loss!** The deletion of documents and templates cannot be undone. When you delete a template, all documents based on it are deleted. If you no longer want a template to be used, but the documents remain, archive the template. In the favorites list: this removes the template from the favorites list.
🖶	Note: visible only for finalized documents with templates where direct production is configured! This requests the production of the document again.
@	This sends an e-mail with the document included as either an attachment or link. For more information, see *Sending a Document as an E-Mail* on page 148.
⤓	Note: only visible for documents! This downloads the document.

Button	Description
➡	You can call up more actions: **Templates** - *Copy Template*: this creates a new template based on the selected template. For more information, refer to Administration Manual Brand Template Builder (see *Additional Documentation* on page 191). - *Revise Template*: this opens the selected template in the template wizard. For more information, refer to Administration Manual Brand Template Builder (see *Additional Documentation* on page 191). - *Archive 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. - *Reactivate template*: If an archived template is needed again for document creation, reactivate the template. Note: Only for archived templates - *> Use* in the favorites hit list: this creates a new document based on the selected template. You open the customizing wizard, in which you can then edit the document. For more information, see *Editing a Document* on page 27. Visible Only for Non-Finalized Templates - *Edit*: this opens the selected template in the templates wizard. For more information, refer to Administration Manual Brand Template Builder (see *Additional Documentation* on page 191). - *Test*: this opens the selected template in the customizing wizard without permanently creating the document. For more information, refer to Administration Manual Brand Template Builder (see *Additional Documentation* on page 191). **Documents** Only Visible for Non-Finalized Documents - *Edit*: this opens a non-finalized document in the customizing wizard. For more information, see *Open* on page 23. Only Visible for Finalized Documents - *Copy and Customize*: this creates a new document as a copy based on the finalized document (not on the basis of the template used). For more information,

Button	Description
	see *Searching for, Copying, and Adapting a Document* on page 20. • *Publish*: this publishes the finalized document in the Media Pool. Note: visible only if your role has the appropriate authorization and the template is configured accordingly! For more information, see *Publication in the Media Pool* on page 151. • *Archive*: You archive the document. By archiving, you mark the document as no longer valid. However, the document is not deleted, but can be reactivated if required. You can only archive finalized documents. • *Reactivate*: You reactivate an archived document. This makes the document available again. Note: Only for archived documents. • *Transfer to Marketing Planner*: this adds the document to a planning element as an attachment. For more information, see *Publication in the Marketing Planner* on page 153. • *Show Related Marketing Planner Nodes*: see a view of the Marketing Planner planning element to which the document was added as an attachment. Note: visible only if the document was already added to the Marketing Planner!

7.4 Detailed View

The detailed view lists the detailed information about a template or document (for example, a document preview, the advertising material ID, the ID of the template used, the custom objects, and other document properties). To open the detailed view, proceed as follows:

- Search results: choose ▢. The detailed view opens in full-screen mode.

- Hit list: click the name or preview image of the document. The detailed view opens in a new window.

> **Note**
>
> This function is only available for INDD and HTML documents.
> It is currently not possible to open a detail view for an online document.

Functions for Templates

Button	Function
Download	Note: for HTML templates only.
	This downloads the HTML template as a ZIP file.

Button	Function
Export	This saves the configuration as an XML file to make it easy to transfer it to a different system. For more information, refer to Administration Manual Brand Template Builder (see *Additional Documentation* on page 191).
Edit	You can edit the metadata of the template. For more information, refer to Administration Manual Brand Template Builder (see *Additional Documentation* on page 191).
Customize	You can create a new document based on the selected template. The document is opened for editing in the customizing wizard. For more information, see *Searching for and Using Templates* on page 17.
Preview	This opens a preview of the template.

Functions for Documents

Button	Function
Preview	This opens a larger document preview in a new window. You can download the document here. If the document is already finalized, you can also send the document as an e-mail or download it.
Edit	Note: only for documents with the status *In Work*. This opens the document for editing in the customizing wizard.
Send Print Request	This opens the *Production, costs and delivery* dialog box. You can request the print of the document again. For more information, see *Reprinting* on page 150.

7.5 Customizing

Customizing is a tool for creating documents for specific purposes, such as brochures or adverts. In Brand Template Builder, you create documents in the following interface elements:

For INDD and HTML documents

- *Customizing Wizard* below
- *Document Editor* on page 176

For Online documents

- *Editor for Online Documents* on page 184

7.5.1 Customizing Wizard

The customizing wizard is the overview area where you can access the individual editing steps for customizing a document. Diagrams and icons help you by indicating the steps that have been performed or the steps that still need to be done.

Steps

You can perform the following steps to adapt a document:

Step	Description
Choose variant	You select one of the variants created in the template used to design your document. You can use variants to adapt a template for different branch offices, for example. For more information about INDD documents, see *Variant* on page 34 and for more information about HMTL documents, see the *Variant* on page 119 section.
Document size	Note: only for INDD documents. You can select the document size for your document. For more information, see *Document Size* on page 37.
Edit document	This opens the document editor (see *Document Editor* on page 176), where you can adapt the individual pages and content elements in your document, such as text and image boxes.
Print Order	Note: only for INDD documents. You can choose how your document is produced and which printing agency it is sent to. For more information, see *Print Order* on page 105.
Publish to the Media Pool	You can publish your document in the Media Pool so that it can be used outside Brand Template Builder or to make it available to other users. For more information regarding INDD documents, see *Publication in the Media Pool* on page 108; for information regarding HTML documents, see *Preparing for Publication in the Media Pool Module* on page 132.
Finalize/ Request approval	You finalize your document editing after completing all of the required customizing steps. Click *Request approval* to request approval for the document. For more information, see *Finalization* on page 136.

Click a step to carry it out in the dialog that now opens. The diagrams for the individual steps support you during editing.

Diagram	Description
	You have already performed these steps. You can call these steps again if you want to make changes.

Diagram	Description
(5) [icon] Publish to the Media Pool [?] →	You have not performed these steps yet.
(4) [icon] Production, costs and delivery [padlock]	A closed padlock indicates steps that you cannot carry out or cannot yet carry out (e.g. because a fixed document size is specified or because you have not yet carried out a step required prior to this step).
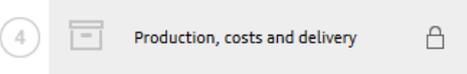
> **Note**
>
> To the right of the individual steps, further details such as the selected vari-ant or document size are displayed.

Preview and Functions

In addition to the overview page for the individual steps, you can see a preview of the document. You can call the following functions by clicking one of the symbols above the preview:

Button	Description
[download icon]	This downloads the document in one of the available output methods.
[envelope icon]	This opens a dialog box in which you can send the document by e-mail in one of the available output methods. Alternatively, you can send a link that the recipient can use to call up the file.
(i)	You open the detailed view of the template used.
	You can change the title, validity period, affiliate ID, and locale of the document.

Choose *Close document* to close the customizing wizard and save your changes. If the document does not have a title yet and you choose *Close document*, you must provide a title for the document in the *Rename document* dialog box that opens. You can also assign an affiliate ID and locale to the document and enter a validity.

To cancel editing and delete the document at the same time, click *Close and delete*.

> **Attention!**
>
> You cannot undo the deletion of a document.

> **Note**
>
> Note: you can access documents that you have edited in the customizing wizard using the *Document Search* menu item in the left-hand navigation pane. In the hit list, click [→] to edit the document and open it again in the customizing wizard.

7.5.2 Document Editor

You edit a document in the document editor. You open the document editor by clicking *Step 3 - Edit document* in the customizing wizard.

Setup

The document editor is divided into three areas:
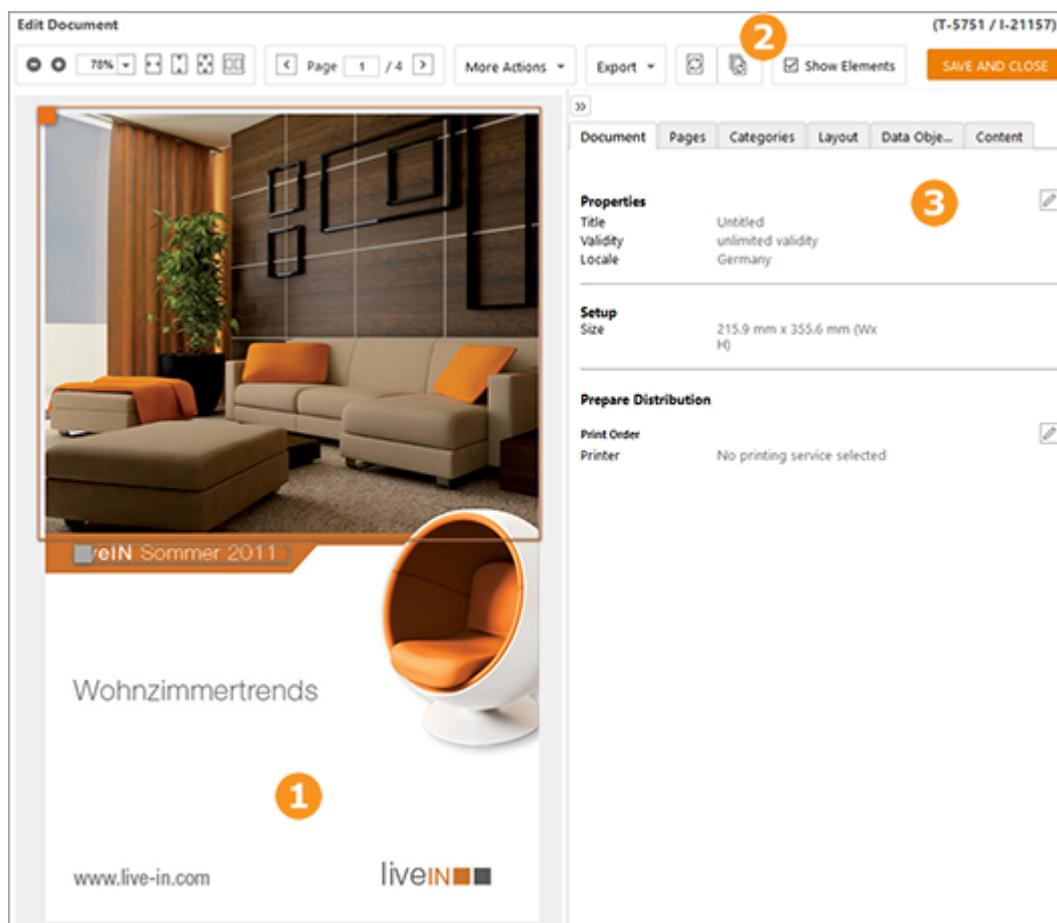
- 1 Document preview
- 2 Document preview editing bar
- 3 Tab from which the individual customizing editing options are accessed

Document Preview

The document preview shows one or, if necessary, two opposite sides of the document that you are editing. Text and image frames can be framed in the document preview and displayed with markings. Overflowing text boxes and graphics/images with excessively low resolutions are displayed with an info message:

The text and image variables that you can edit in the document editor are selected with an object handle:

Click an object handle to activate the relevant variable for editing. If you are on the *Categories*, *Layout*, *Data objects*, or *Content* tabs, you can open context menus from the object handle. From the context menus, you can access additional func-

tions, for example, for *deleting dynamic Smart Grids or image boxes*, *copying data objects*, *pasting data objects*, or *deleting the link to a data object*. You can also use the object handle to access the transformation functions (*Content* tab).
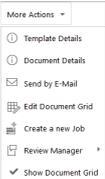
> **Note**
>
> The individual content elements and object handles of the selected document pages are only visible if the *Show Elements* option in the editing bar is active.

Editing Bar

In the document preview editing bar, you can configure the following settings and/or call the following functions:

Button	Description
	Scale the size of the preview image using +/- or enter a percentage value to define the size of the preview. Click one of the symbols to modify the preview size so that it fills up the entire screen, entire width of the screen, or entire height of the screen. In documents with multiple pages, you can display two pages next to each other.
	In the document preview, scroll through the pages of the document.
	You open the *Mass customization* dialog, where you can download the Excel file required for the customization and can then upload the edited file.

| Button	Description
More Actions ▾ ⓘ Template Details ⓘ Document Details ✉ Send by E-Mail ▦ Edit Document Grid ⬆ Create a new Job ⊟ Review Manager ▸ ✓ Show Document Grid	Choose *More Actions* to access the following functions: • *Template details*: open the details view for the template. • *Document details*: this calls the detailed view of the document. • *Export to Prepress Document*: you can download the template file to edit it locally. Note: this button is displayed only if the document is allowed to be exported and imported. For more information, see *Exporting a Print Template* on page 103. • *Import from Prepress Document*: this uploads a template file that is saved locally. Note: this button is displayed only if the export and import of the document is permitted. • *Create a new Job*: you can start a new job in the Job Manager module. Note: available only if the Job Manager module is available in your system. • *Review Manager*: you can create a new review in the Review Manager or open an existing review. Note: available only if the *Review Manager* module is available in your system. For more information, see *Reviews* on page 104. • *Settings*: you can select whether the document elements or document grid are displayed. If elements are shown, the individual text and image boxes are displayed with borders and the object handles. For HTML documents, you can choose whether the links are deactivated. • Click *Manage data object groups* to group together the data objects inserted on the *Data objects* tab or to edit data object groups that have already been created. Data object groups are marked as a group when the original file is exported to a prepress document. For more information, see *Exporting a Print Template* on page 103. • Click *Change document grid* to change the size of the document grid that can be displayed on the *Layout* tab. For more information see *Grids* on page 57. • Click *Choose variant* to select one of the document variants created in the template. For more information, see *Variant* on page 34. • *Show document grid*: You choose whether to display the document grid of the document. • *Disable HTML links*: For HTML documents, you can choose whether to disable the links.

Button	Description
Export ▼ Preview PDF (Single pages) Original file (Adobe InDesign) (Single pages) ▸	You can export the document to one of the available output methods, including: • *Preview PDF (Single pages)*: this exports the document to a preview PDF. • *Original format (Adobe InDesign) (Single pages):* this exports the document in its original format. Choose whether the document is exported with or without images.
	This refreshes the displayed page. If a warning triangle is displayed on the button, the preview is no longer up to date. For more information, see the chapter *Refreshing the Document Preview* on page 133.
	Note: this button is displayed only if the document has multiple pages. This refreshes all of the pages in the document. If a warning triangle is displayed on the button, the preview of at least one page is no longer up to date. For more information, see the chapter *Refreshing the Document Preview* on page 133.
	Note: this button is displayed only if the real-time preview is activated in your system and permitted in the document. Real-time preview: the displayed page is updated after each change. For more information, see *Refreshing the Document Preview* on page 133.
☐ Show Elements	You choose whether the elements of the document are displayed. When elements are displayed, the individual text and image boxes are marked with a border and the object handles.
SAVE AND CLOSE	You close the document editor and return to the customizing wizard.

Tabs

To help you edit a document, the steps required for customizing and the content elements are clearly arranged on the various tabs on the right-hand side of the document editor.

»					
Document	Pages	Categories	Layout	Data Obje…	Content
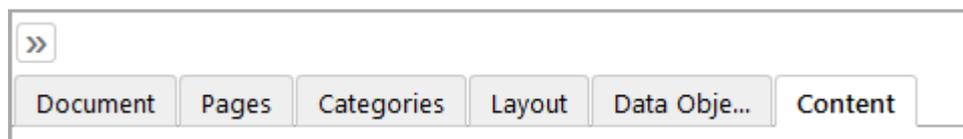
> **Note**
>
> Click ⏩ to expand the complete right-hand editing bar and center the current document page on the screen. If you click again, the bar is collapsed again. Change the width of the tab by grabbing and moving the left-hand edge with the mouse.

You can edit your document from the individual tabs:

Tab	Description
Document	The following items are displayed on the tab: • The document properties (see *The Document Properties* on page 30 for INDD documents and *The Document Properties* on page 116 for HTML documents). • Information for the user • The size of the document (only for INDD documents; see *Document Size* on page 37) • Variant (see *Variant* on page 34 for INDD documents and *Variant* on page 119 for HTML documents) • Settings for a print order (only for INDD documents; see *Print Order* on page 105) • Publication in the Media Pool (see *Publication in the Media Pool* on page 108 for INDD documents and *Preparing for Publication in the Media Pool Module* on page 132 for HTML documents)
Pages	Note: only for INDD documents. Choose the page of the document that you want to edit or add or delete pages to or from your document. You can switch between the various view options (working and print view) and between the pages to be edited. You can also easily change the page order using drag and drop, if this function is activated in the template. For more information, see *Document Structure* on page 43.
Categories	Note: only for INDD documents. Assign a category to the grids. The category determines which data objects you can select on the *Data objects* tab. For more information, see *Categories* on page 67.

Tab	Description
Layout	Note: only for INDD documents. Define which layout variants you use for the currently selected page. You can also display a document grid to create dynamic Smart Grids or dynamic image boxes. For more information see *Layout* on page 71.
Data Objects	Note: only for INDD documents. Define the data objects whose information you want to add to the content elements. You can use variables to dynamically read out information such as traits, technical information, or item prices from the *Marketing Data Hub* module. You can link the data objects to a content element using drag and drop. For more information, see *Data Object* on page 79.
Content	You can adapt the text and image boxes for your document. You can select alternative images and texts and then edit the selected images and texts. For more information, see *Texts and Images* on page 85.

7.5.3   Object Handles

The text and image boxes that you can edit in a document have an orange object handle. By clicking the object handle, you can select the box to edit its content, for example. If a white downward-pointing arrow is also displayed on the object handle, a menu with additional functions is available on the object handle. Note that the functions that you can access depend on the template configuration made by the designer and the selected tab in the document editor.

Context Menu

Click the white arrow on the object handle to open the context menu.

| Function	Description
Delete Smart Grid	Note: you can only access this function on the *Layout* tab and it is available only for dynamic Smart Grids. Click *Delete Smart Grid* to remove a created dynamic Smart Grid from the current page. ■ Associated tasks: *Deleting a Dynamic Grid* on page 64

Function	Description
Delete layout assignment	Note: you can only access this function on the *Layout* tab. Click *Delete layout assignment* to delete the link between the content element and a layout. ■ Associated tasks: *Deleting a Layout Assignment* on page 78
Delete category assignment	Note: you can only access this function on the *Categories* tab. Click *Delete category assignment* to delete the link between the content element and a category. ■ Associated tasks: *Deleting a Category Assignment* on page 70
Previous usage	Note: you can only access this function on the *Products* tab. This opens a dialog box displaying the documents in which the product that is currently selected has already been used. That includes the finalized documents of other users and your own documents that have the status Finalized and In progress. ■ Associated tasks: *Reuse data object information* on page 84
Cut product	Note: you can only access this function on the *Products* tab. This cuts the product that is currently selected and adds it to the clipboard. You can paste the product in another content element using the context menu. ■ Associated tasks: *Cutting and Pasting a Data Object* on page 82
Copy product	Note: you can only access this function on the *Products* tab. You copy the currently selected product to the clipboard. You can paste the product in another content element using the context menu. ■ Associated tasks: *Copying and Pasting a Data Object* on page 82
Swap product	Note: you can only access this function on the *Products* tab. This swaps the products on two grids: Select a grid and click Swap product. Select the second grid and choose Paste product. The two products are then swapped. ■ Associated tasks: *Swapping Data Objects* on page 83

Function	Description
Paste product	Note: you can only access this function on the *Products* tab. You paste a copied or cut product or product to be swapped from the clip-board to the selected content element. ▪ Associated tasks: *Cutting and Pasting a Data Object* on page 82 and *Copying and Pasting a Data Object* on page 82
Delete product assignment	Note: you can only access this function on the *Products* tab. You delete the link between the content element and the product. ▪ Associated tasks: *Deleting a Data Object Assignment* on page 84
Transformations	Note: you can only access this function on the *Content* tab. This calls the dialog box for transforming a box. ▪ Associated tasks: *Displaying Boxes in the Document* on page 101

7.5.4   Editor for Online Documents

In the editor for online documents you perform all edits.
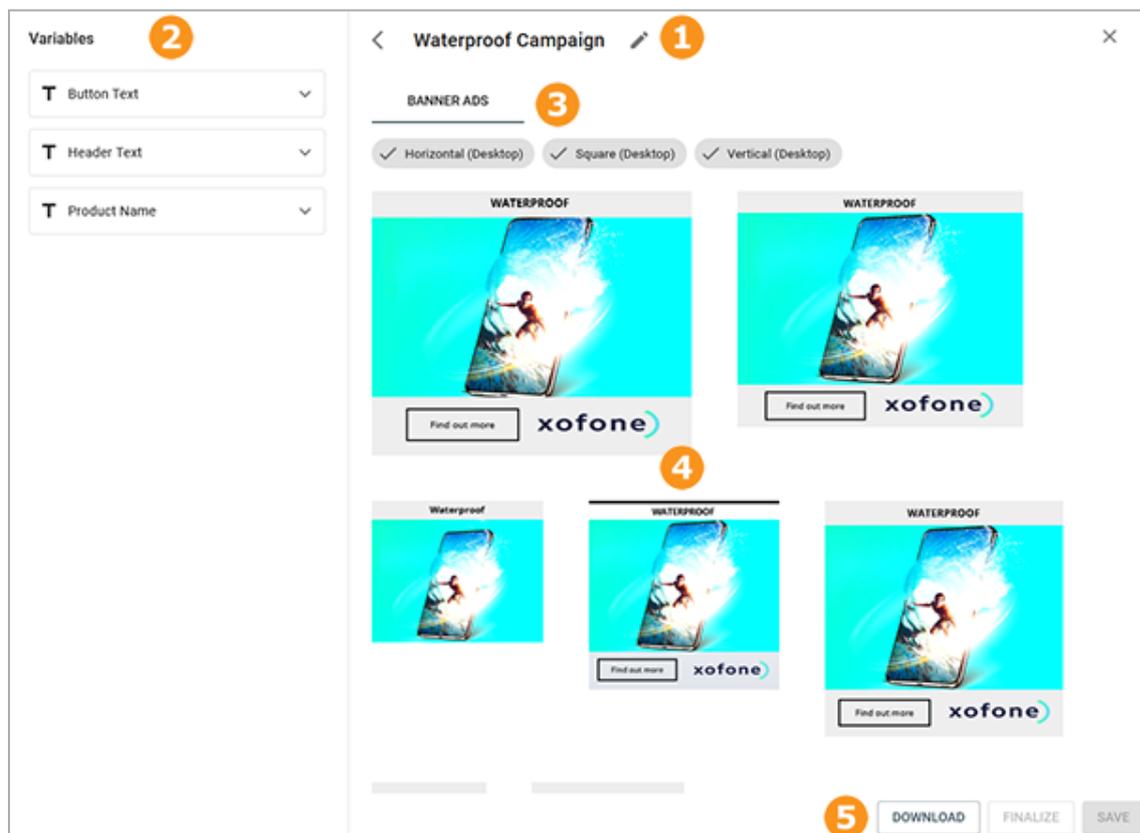
1 **Document name**

Click the pencil icon to set the name of the document. You can enter the name in multiple languages if necessary.

2 **Variables**

The left pane lists the variables that the designer has set up for the template. To finalize a document, you must edit all the mandatory variables.

3 **Channels**

If the template contains sources for different channels, they will be displayed as tabs in the editor. In the above example, only the *Banner Ads* tab is shown.

The ads that are mapped to each tab are filterable based on the characteristics shown at the top of each tab. Note that this filtering has no effect on the output. All created formats are always output.

4 **Preview**

This area shows a preview of the displays that are included in the template. Changes in the variables are immediately displayed in the preview.

5 **Actions**

In this area you can reach the actions for the document:

- Save: You can save a document at any time. For more information see *Online Documents* on page 113.

- Finalize: If you can save an online document without errors, you also have the option to finalize it. For more information see *Finalize online document* on page 137.

- Download: You can distribute a finalized document for further use.

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Resources

8

This section provides additional guidance for specific situations to complement the functional descriptions and the description of the user interface.

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.).

- You need a general overview of how to handle complicated issues.

An overview is available in *Use Cases* on the facing page.

FAQ

This section provides answers to questions about specific situations.

An overview is available in *FAQ* on page 190.

Additional Documentation

This section contains links to additional documents which you might also find useful (see *Additional Documentation* on page 191).

8.1   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.).

- You need a general overview of how to handle complicated issues.

You can search for the relevant use cases in the overview 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.

8.2 FAQ

This section provides answers to questions about specific situations.

> **Note**
>
> This section is still under construction. If you have any questions that this section does not completely answer, please email us at docu-mentation@brandmaker.com.

8.3 Additional Documentation

This page provides links to documents containing additional information.

- Brand Template Builder Administration 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

- Review Manager User Manual

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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 super-ordinate 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

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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