InDesign Extension

User Manual

Version 7.1

Table of Contents

Copyright

Specifications and data contained in this document are subject to change without prior notice. The names and data employed in the examples are fictitious unless stated otherwise. No part of this document may be reproduced or made available for any purpose and in any way by whatever means, be it electronically or mechanically, without the express written permission of BrandMaker GmbH.

© BrandMaker GmbH. All rights reserved.

Rüppurrer Straße 1, 76137 Karlsruhe (Germany), www.brandmaker.com

All brands mentioned are the sole property of their respective owners.

Your feedback is important to us!

We would be grateful to be notified of any errors you may discover. Just send us an e-mail to documentation@brandmaker.com.

1   Introduction

The InDesign Extension for BrandMaker provides you with convenient tools for accessing media objects or Smart Groups within your familiar Adobe InDesign work environment.

The advantages at a glance:

- All assets such as graphics, photographs, etc. are managed centrally in the Media Pool.
- Existing assets and Smart Groups can be accessed directly from Adobe InDesign.
- The Media Pool is used within the familiar work environment.
- Edited documents can be stored as versions of already existing assets when they are uploaded into the Media Pool.
- Assets are referenced in the InDesign document. The links are maintained during downloading and uploading.

1.1   Objectives and structure of this manual

This manual explains how to access the Media Pool directly from Adobe InDesign with the InDesign Extension for BrandMaker. You will learn about the individual functions, e.g., about opening an InDesign document in the Media Pool or updating the downloaded document.

The *InDesign Extension* user manual is intended for BrandMaker users such as graphics and layout artists who are looking for a comfortable tool to access media objects and search functions of the Media Pool within their familiar work environment.

> **Note:**
> The manual describes the InDesign Extension for InDesign CC. The content may differ slightly for InDesign CS.
> The search options provided by the Media Pool are not described in detail in the manual. We recommend the *Media Pool User Manual*.

1.2   Prerequisites and notes

Certain conditions must be met to use the InDesign Extension. Note the document *System Requirements Client* in the corresponding version.

Please note:

- The InDesign Extension for BrandMaker can be used only as of BrandMaker Release 5.22.

- In the Media Pool, the document versions created via the InDesign Extension during an upload or update are displayed in the detailed information for the media object on the *History* tab.

- The images used in the InDesign document are stored in the *images* folder in the local media folder that you specified in the settings.

- The downloaded InDesign document is stored in the *documents* folder in the local media folder that you specified in the settings.

If you have questions about the use of or conversion to the new InDesign Extension for BrandMaker, please contact your contact person.

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: Click *> and then >*.

Areas of a *dialog box,* names of *dialog boxes* or *column names* are in *italics.*

2 Installation

The In-Design extension for BrandMaker is delivered as an Adobe extension. If you are using a CS version, you perform the installation using the Adobe Extension Manager. Refer to the chapter Installing CS versions page 5.
If you are using a CC version, the extension is installed without using the Extension Manager. Refer to the chapter Installing CC versions page 6.

> **Note:** Note that you require the relevant administration rights on the computer to install the extension. If you have any questions, please contact your administrator responsible.

2.1 CS versions

To install the CS versions of the InDesign Extension using the Extension Manager, proceed as follows:

1. Close Adobe InDesign.

2. Start Adobe Extension Manager.

3. Click *Install* and navigate to the directory in which the InDesign Extension for BrandMaker is stored.

4. Select the extension file (file extension ZXP).

> **Note:**
> Double-click a ZXP file to start the Adobe Extension Manager directly.

5. Read the liability disclaimer. To confirm the disclaimer, click *Accept*.
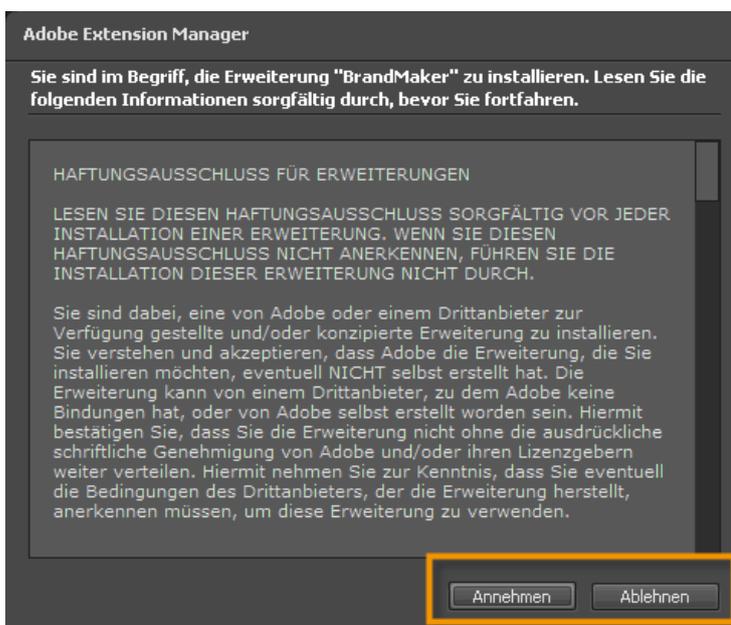
The installation is performed. After a successful installation, the InDesign Extension for BrandMaker is listed in the Extension Manager overview.

2.2 CC versions

To install the CC versions of the InDesign Extension, proceed as follows:

1. Close InDesign.

2. Open the directory in which you stored the ZIP file with the installation files.

3. Open the ZIP file or extract the files that it contains.

4. Double-click the file setup.exe.

5. Follow the installation instructions.

The InDesign Extension is installed.

3   Configuration

3.1   Initial configuration

1. Open the *Settings* menu item via the InDesign Extension for BrandMaker palette to configure the InDesign Extension:
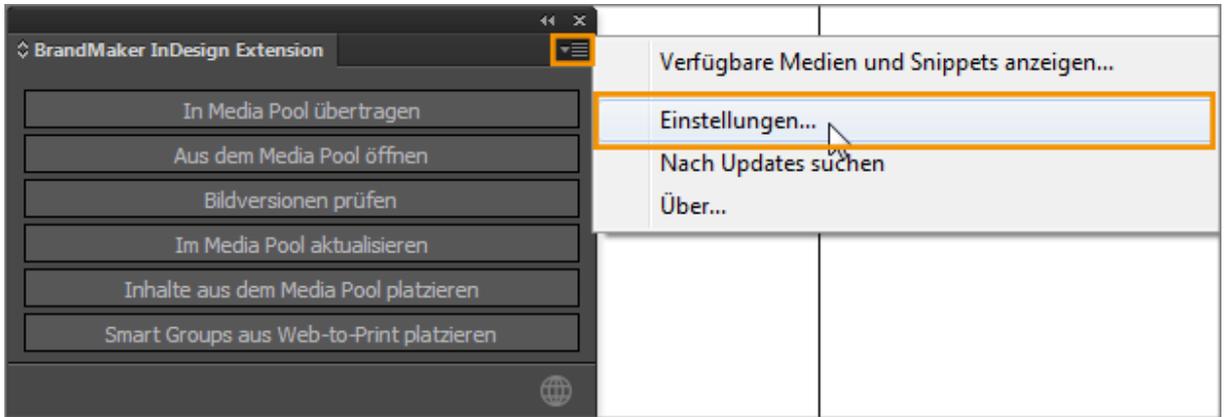
The following dialog box is displayed:
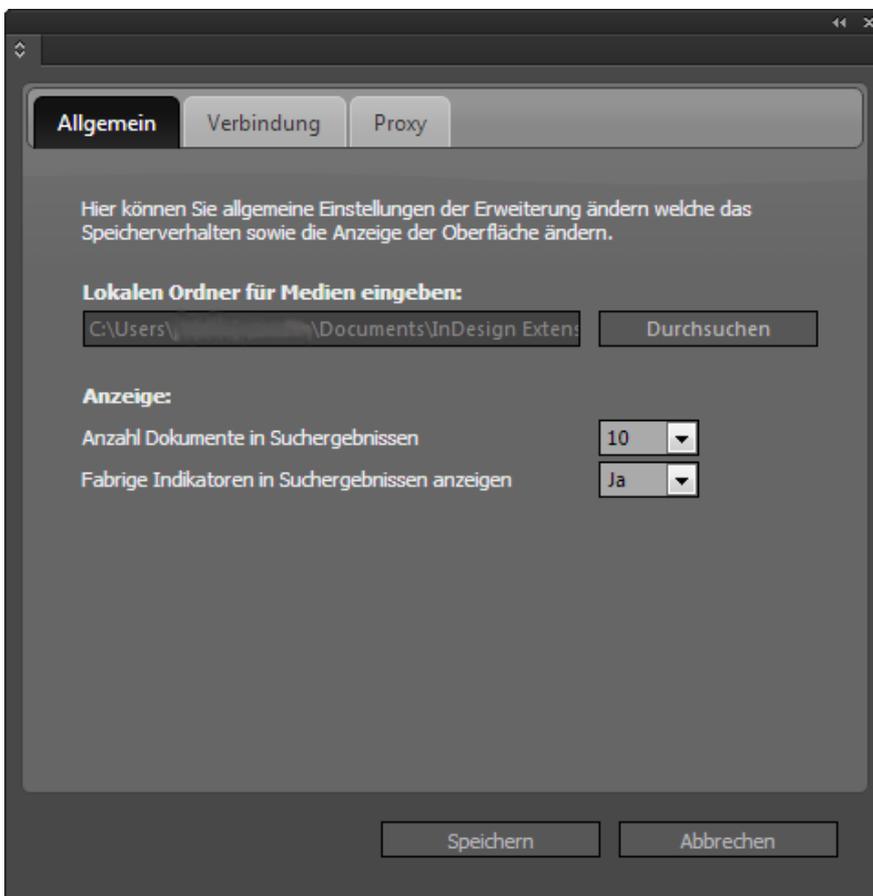
2. If the connection is established via a proxy server, go to the *Proxy* tab.

3. Edit the fields so that the connection can be established via the proxy server.

4. Go to the *General* tab.

5. Edit the following fields:

- *Enter local folder for media:* Specify where the media objects downloaded from the Media Pool are to be stored. The *documents* and *images* folders are created in the specified directory.

> **Note:** If you configure the InDesign Extension on a computer with the operating system MAC OS, then you have to enter an absolute directory path.

- *Number of documents in search results*: Choose how many hits are displayed on one page.

- *Show color indicators in search results*: Choose whether the file type of a hit is highlighted in color in the display.

6. Go to the *Connection* tab.

7. Edit the following fields:

- *Server name*: Enter the URL of your BrandMaker system (for example: https://YourURL.brandmaker.com).

- *Username*: Enter your user name.

- *Password*: Enter your password.

8. Choose *OK*.

The InDesign Extension is ready for use.

3.2 Configuring additional connections

If you want to connect multiple systems using InDesign Extension Assets, you can save multiple connections.

Setting up an additional connection

1. Open the *Settings* menu item and *Connection* tab from the InDesign Extension:
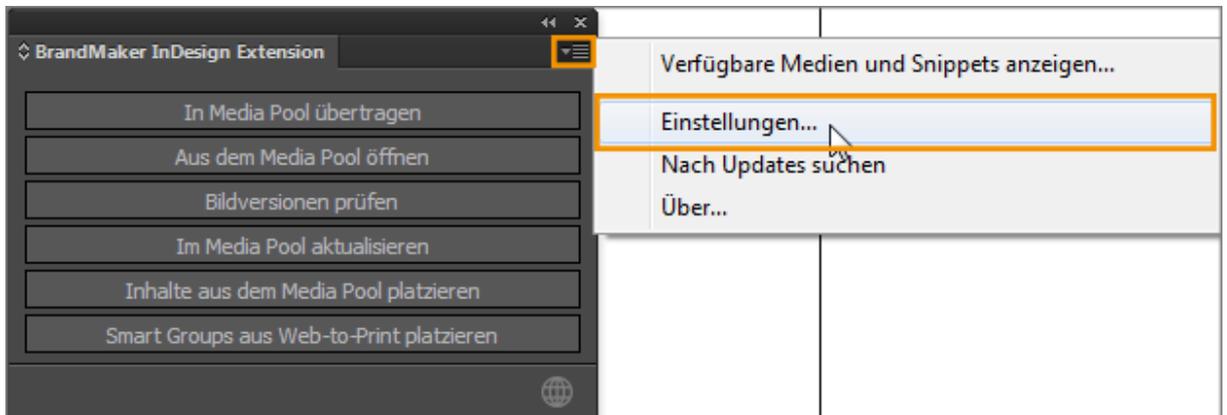
2. Enter the new connection data.

3. Choose *OK*.

The InDesign Extension connects to the new system. The new access data is saved as well as the previous data.

Calling a saved connection

1. Open the *Settings* menu item and *Connection* tab from the InDesign Extension:

2. In the *Server name* field, enter the first character of the URL for the stored system (including https://).

A dropdown menu is displayed with the system URLs that match your entry.

3. Select your required system.

4. Choose *OK*.

The saved user data that matches the URL is loaded. The InDesign Extension connects with the selected system.

4 Functions
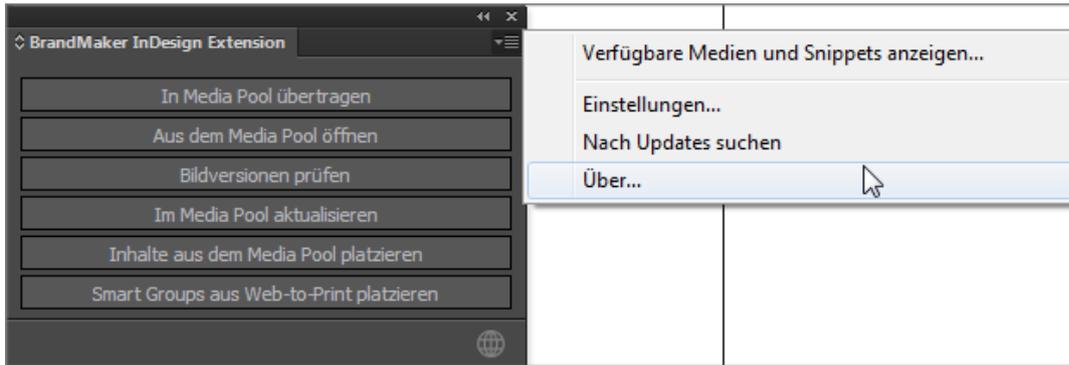
You can use the following functions with the InDesign Extension for BrandMaker:

Show downloaded medias and snippets	You can open a list of all of the media objects and Smart Groups placed in the document up to this point. You can add available objects again easily without having to carry out another search. For more information, see the chapters Inserting images from the Media Pool into the InDesign document (see "Place images from Media Pool" page 15) and Inserting Smart Groups into the InDesign document from Brand Template Builder ("Inserting Smart Groups from Brand Template Builder " page 17).
Output settings	You can configure the InDesign Extension for BrandMaker.
Check for updates	Checks whether a new version of the extension is available.
About	You receive information about the version of the extension, for example.
Upload to Media Pool	You can use the import function to load the opened document to the Media Pool. You can further edit the import in the Media Pool under > *Import*.
Open from Media Pool	You open a Media Pool search. To download an InDesign document, select *Open document with plug-in* in the menu.
Check images versions	Check whether a new version is available for one of the images used from the Media Pool. Note the chapter for checking whether the assets used are the latest version page 14.
Update in Media Pool	You can transfer changes such as the addition of an image, for example, to the Media Pool. You can view the change history or the individual versions of the document in the detailed view of the media object under the *History* tab.
Place media from Media Pool	Search for and place the assets from the Media Pool.
Insert Smart Group from Brand Template Builder	Search for and place Smart Groups from Brand Template Builder. The individual components of the placed Smart Groups are added to the document as new elements (text or image boxes).

Note: When you open or download an InDesign document from the Media Pool, the folders *images* and *documents* are created in the local media directory and the images that are used and the InDesign file are saved in these folders.

Note: With the *Place Smart Group* function, you can only access Brand Template Builder Smart Groups for which you have the appropriate rights. When a Smart Group is added to the InDesign document, the components of the Smart Group are inserted as new content elements (text or image boxes). On uploading or updating the document in the Media Pool, Smart Groups are not identified as such again, rather only the new content elements of the document are accepted.

5 Use

5.1 Displaying the InDesign Extension

1. Start Adobe InDesign.

2. In the upper navigation pane, click > *Window* > *Extensions* and activate the *BrandMaker Media Pool* extension. Activate the *BrandMaker Review Manager* extension so that you can display and edit comments from the Review Manager module.
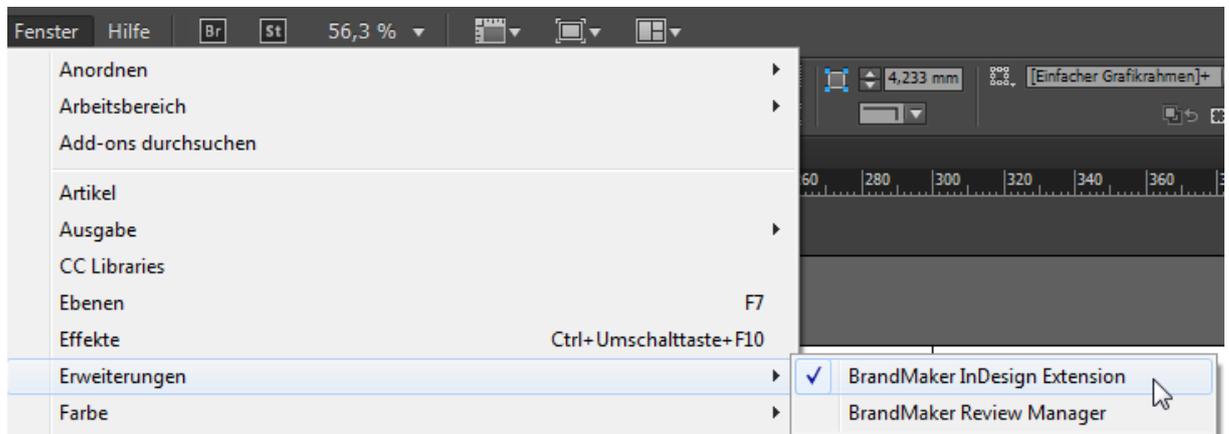
The InDesign Extension is displayed.

5.2 Opening a document from the Media Pool

You want to download and edit an InDesign document that is provided centrally in the Media Pool.

1. Click *Open from Media Pool*.

The Media Pool search opens. All of the InDesign documents from the Media Pool that you can access are displayed.

2. Search for the document that you want to open:

- Enter a search word in the search line.

- Limit the result by selecting one or more aggregations on the left-hand side.

- Change the order by selecting other sorting criteria on the right above the search results.
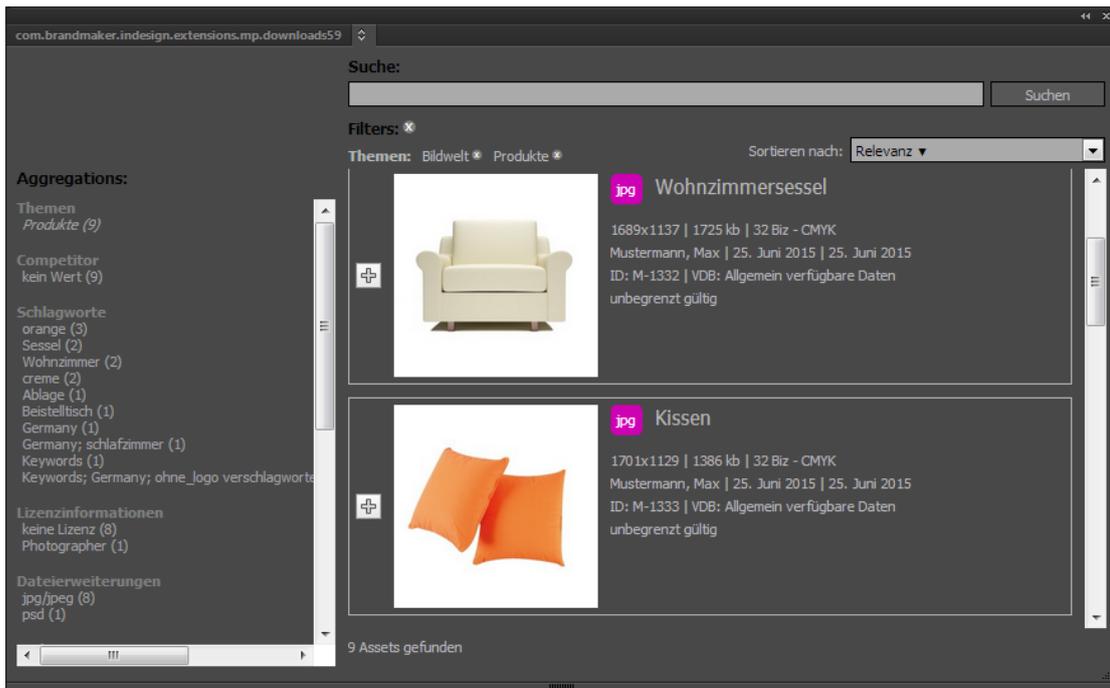
3. Click the plus button for the document that you want to open.

The document opens in InDesign.

> **Note:**
> You can use the various search options of the Media Pool for a new search. For more detailed information about the Media Pool and the various search options, see the *Media Pool User Manual*.
>
> **Note:**
> The InDesign file is saved in the *documents* folder of the local media folder that you saved under settings. The images used in the InDesign document are saved in the *images* folder of the local media directory.

When you download the document from the Media Pool, the InDesign Extension checks whether newer versions for the images used are available in the Media Pool. In the dialog box that opens, you can decide how you want to handle the image versions.

> **Note:**
> For more information about working with image versions, see the chapter Checking whether the media objects used are up-to-date ("Checking whether the images used are up-to-date" page 14).

5.3   Checking whether the images used are up-to-date

An InDesign document downloaded from the Media Pool is saved together with the used images in the local media directory that you specified. You can edit the locally downloaded file. To ensure that/check whether you are using up-to-date images in your document, you can use the InDesign Extension to check whether a more up-to-date, modified, or new official version of an image is available in the Media Pool.

To check whether the images used are up-to-date, proceed as follows:

1. Choose *Check image versions*.

2. The images are checked. If new image versions are available in the Media Pool, a new dialog box opens.
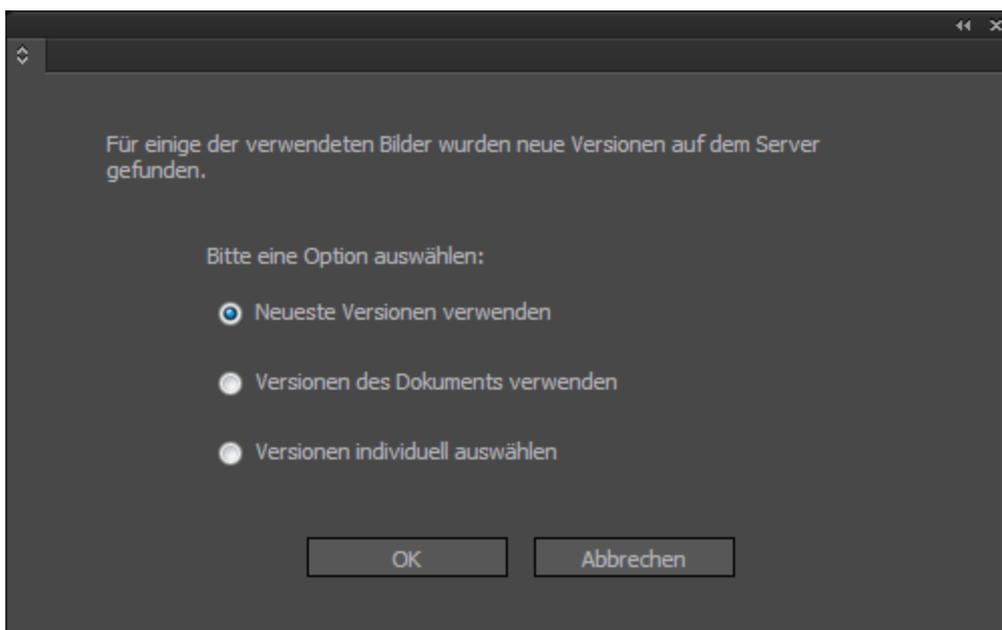
3. Select one of the options:

Use the newest versions	You load the newest versions from the Media Pool.
Use the document's versions	You keep the image version that is currently being used in the document.
Choose versions individually	This opens a dialog box in which you can select the image version that you require.

4. Choose *OK*.

The *Choose versions individually* option opens an additional window.
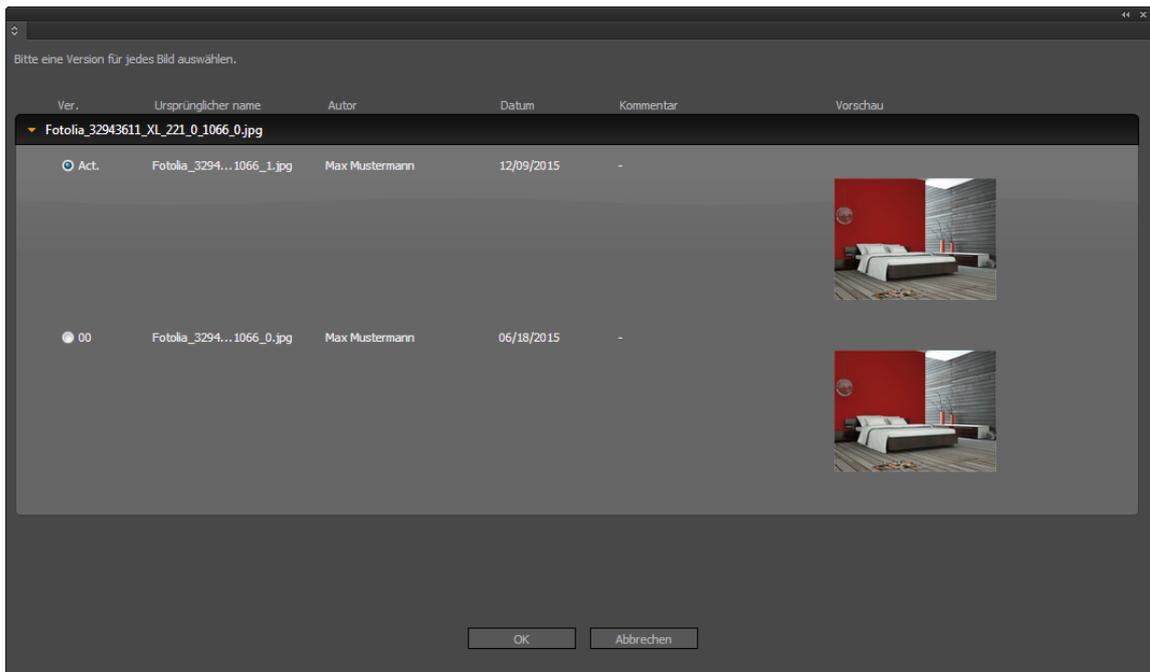
5. If you select the versions individually, activate the checkboxes of the image version that you want to use.

6. Confirm your selection by choosing *OK*.

You have checked the images and replaced them with newer versions if necessary.

5.4 Place images from Media Pool

Using the InDesign Extension for BrandMaker, you can place additional media objects, for example images, from the Media Pool in your InDesign document.

1. Choose *Place media from Media Pool*

The Media Pool search opens.
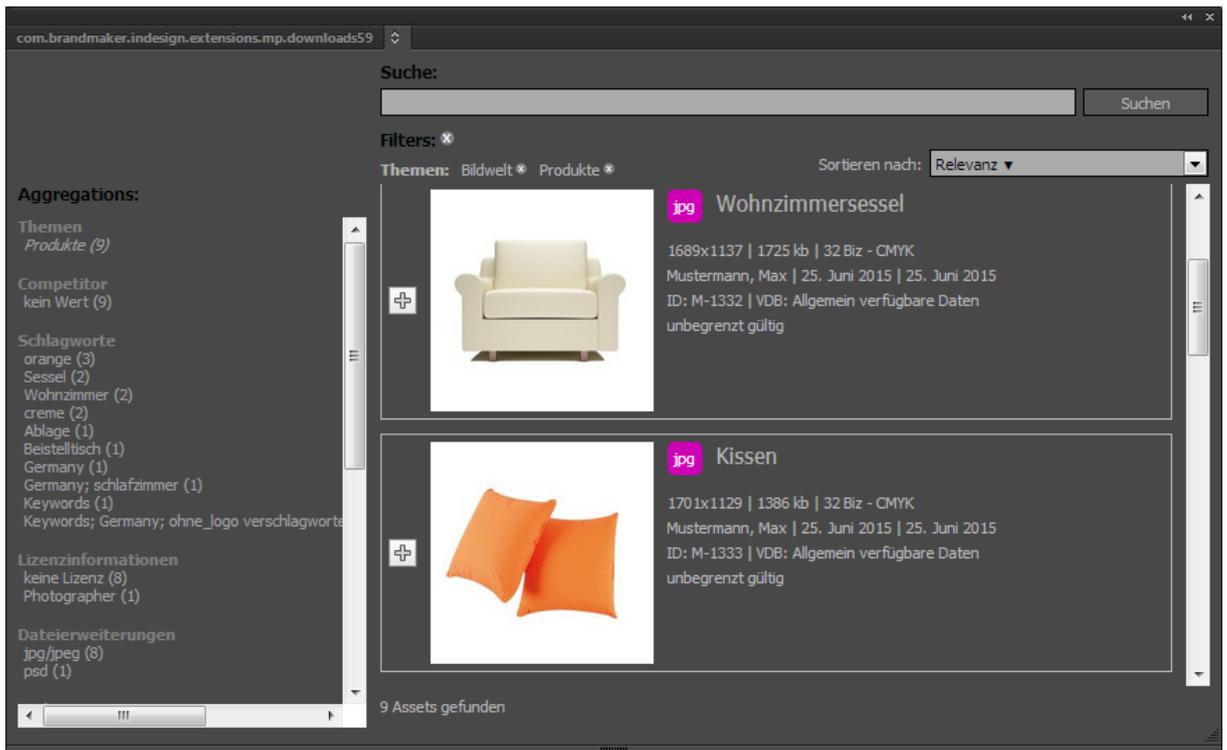
> **Note**:
> When you call the Media Pool search, parameters for selecting the file types supported by InDesign are applied automatically and used as preset search criteria.

2. Search for an image that you want to place:

- Enter a search word in the search line.

- Limit the result by selecting one or more aggregations on the left-hand side.

- Change the order by selecting other sorting criteria on the right above the search results.

3. Click the plus button for the image.

Once you have selected an image, the *Show downloaded medias and snippets* palette is displayed. The selected image is inserted into the palette:
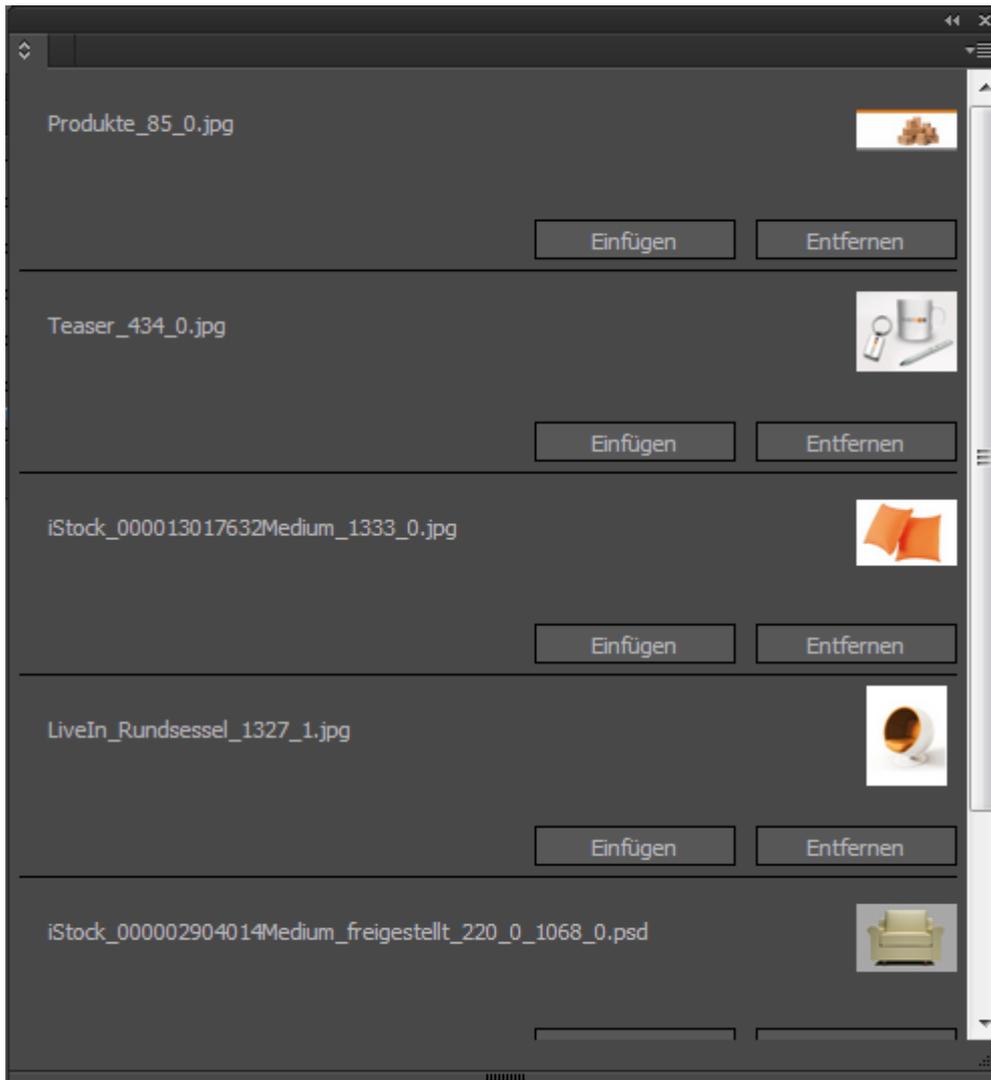
4. Click the *Add* button next to the image that you want to place.

5. Place the image.

The image remains listed in the palette. You can also select or flag additional images using the hit list of your Media Pool search. Your selection is loaded to the palette. To delete an image from the palette, choose *Remove*. The image is then not deleted from the InDesign document. To completely empty the palette, open the menu on the top right and click *Remove all*.

> **Note:**
> You can call the palette at any time using the *Show downloaded medias and snippets* function.

5.5 Inserting Smart Groups from Brand Template Builder

To make it easier to work with relevant product information, such as current product features, descriptions, technical information, prices or images, for example, this information can be

summarized in Smart Groups. By linking to the *Marketing PIM* BrandMaker module, Smart Groups can also be filled directly and automatically through variables. Suitable Smart Groups for the advertising materials are made available in the *Brand Template Builder* module.

> **Note:**
> For more information about the PIM and Web-to-Publish modules, see the *Brand Template Builder User Manual*, the *Administration Manual* and the *Marketing PIM User Manual.*

You can use the InDesign Extension for BrandMaker to place Smart Groups from *Brand Template Builder* in your InDesign document.

> **Note:**
> In the *Brand Template Builder* template, you can define which Smart Groups can be used in the documents that are based on the template. You can only access Smart Groups for which you have the required rights or that you can also select in step 3 *Edit document* in the customizing wizard in *Brand Template Builder*.

Inserting a Smart Group from *Brand Template Builder*

1. Choose *Insert Smart Group from Brand Template Builder*.

    The search opens.

2. Enter a search word.
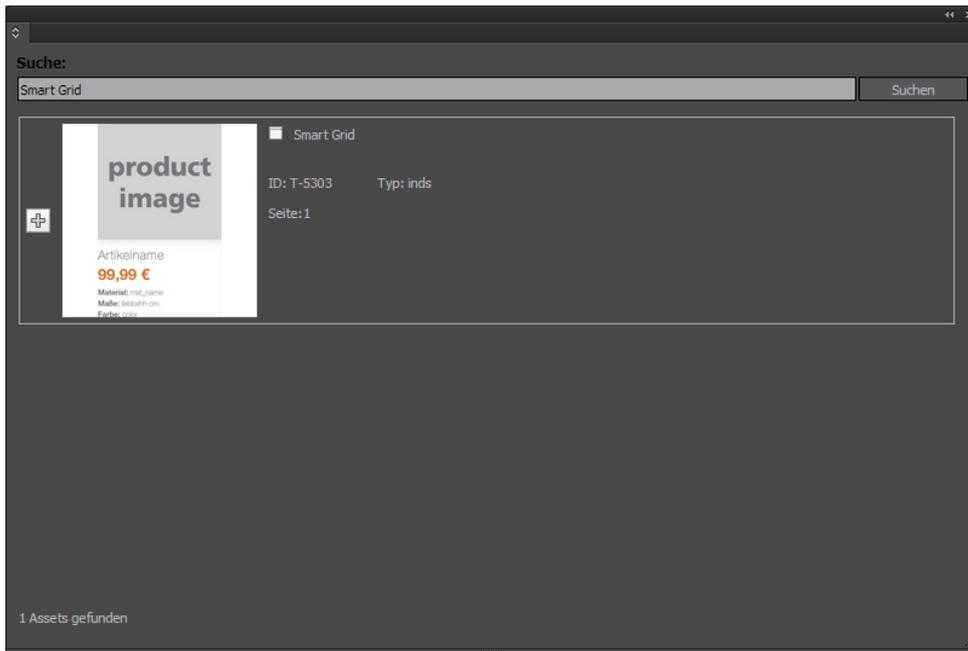
3. Click the plus sign.

Once you have selected a Smart Group, open the *Show downloaded medias and snippets* palette in the InDesign Extension. The selected Smart Group is inserted into the palette:
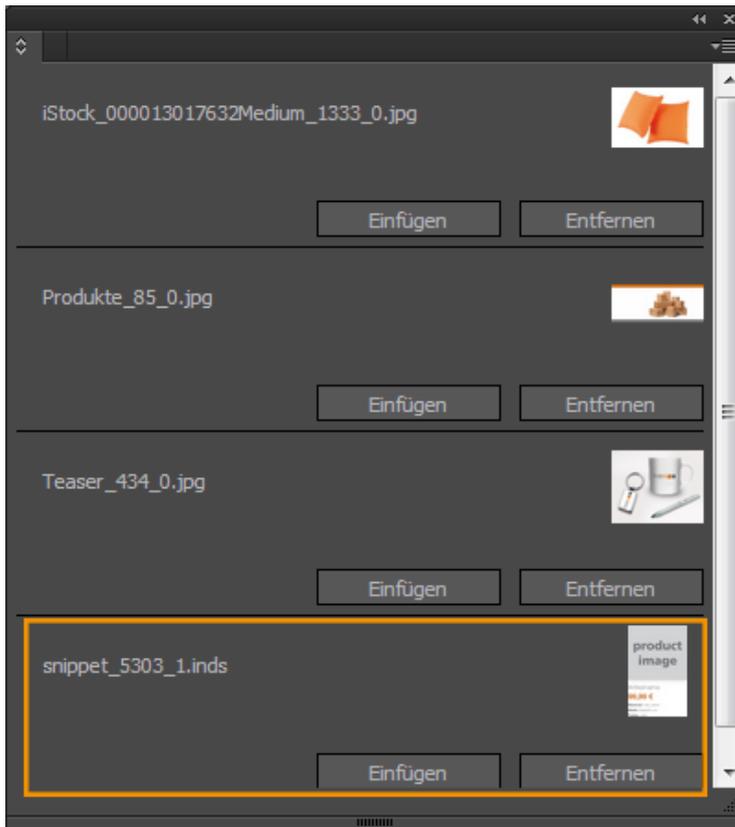
4. Choose *Insert*.

The Smart Group is imported.

5. Placing the Smart Group.

You have inserted the Smart Group. The Smart Group remains listed in the palette. You can select or flag additional Smart Groups using the hit list. Your selection is loaded to the palette. To delete a Smart Group from the palette, choose *Remove*. The placed Smart Group is then not deleted from the InDesign document. To completely empty the palette, open the menu on the top right and click *Remove all*.

> **Note:**
> The individual components of a Smart Group are added to the InDesign document as new content elements (text or image boxes). When the InDesign document is uploaded or updated in the Media Pool, Smart Groups are not recognized as such; instead, only the new content elements of the document are adopted and transferred.
>
> **Note**
> You can call the palette at any time using the *Show downloaded medias and snippets* function.

5.6 Loading a document into the Media Pool

In addition to opening, downloading and updating an InDesign document saved centrally in the Media Pool, you can now import a locally created document to the Media Pool for the first time. To import your InDesign document to the Media Pool, proceed as follows:

1. Save your InDesign document.

2. Choose *Upload to Media Pool*.

You open the dialog box that displays information about the status of the process. The InDesign Extension for BrandMaker checks whether the images used exist already in other versions in the Media Pool. If so, you can specify how the image versions are to be handled.

> **Note:**
> For more information about working with image versions, see the chapter Checking whether the media objects used are up-to-date ("Checking whether the images used are up-to-date" page 14).

The InDesign Extension also checks whether the document already exists as a media object in the Media Pool.
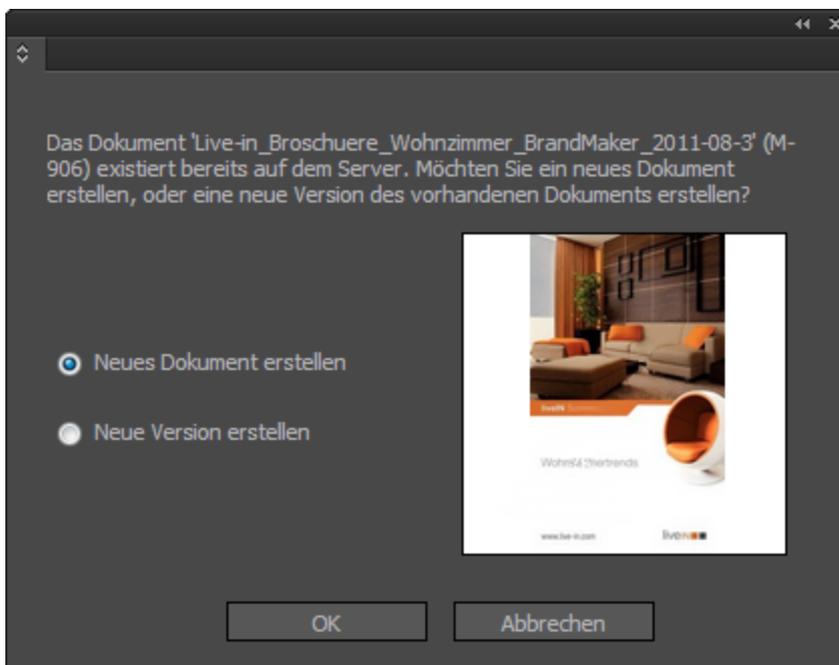
> **Note:**
> The name and media ID of the InDesign document are displayed in the *Document exists* dialog box.

3. If the dialog box is displayed, select from the options:

Create a new media	This imports the document and creates a new media object with a new media ID. You have to complete the import in the Media Pool.
Create a new version	This creates a new version of the existing media object.

4. In the Media Pool, edit the metadata of the media object to complete the import of your InDesign document.

You have loaded the document to the Media Pool.

> **Note:**
>
> The document is first available in the Media Pool if the following applies:
>
> > Metadata is edited and at least the mandatory fields are correctly filled. In the Media Pool, mandatory fields are marked with *.
>
> > If the media object is to be stored in a VDB that requires approval, approval is requested and accepted by the approver.

5.7 Updating a document in the Media Pool

You can edit and save the document downloaded from the Media Pool locally in InDesign. To upload or update the document again to the Media Pool, choose *Update in Media Pool.*

When the InDesign document is updated, the following changes are taken into account and adopted:

Document settings	A changed page format and a changed page size are detected during the update and the new format information is delivered.
Image and text frames	Following changes to image and text boxes are detected and delivered during the update: • The change of the frame position • The change of the frame dimensions and/or frame sizes • The deletion or addition of a frame, including the position of the new frame • Changes to the content of an image frame (new position or scaling) • The deletion of the content of an image frame • Reloading of an image frame content or the insertion of a new image • Changes to the content of a text box (new text or the addition of text wraps) • Changes in format styles in text boxes in an advertising material based on a *Brand Template Builder* template (only formats created in the *Brand Template Builder* template are taken into account). • The deletion of text box contents
Layers	Following changes to layers are detected and delivered during the update: • The movement of objects to another layer • Changes to the sequence of layers • The addition or deletion of layers • Changes to the sequence of objects within a layer (Z-arrangement)
Media objects used in the document	Changes made locally to an image that already existed in the Media Pool before downloading the InDesign document are transferred to the Media Pool.

During the update of the document, the image versions are checked. If different image versions exist in the Media Pool, you can specify how the image versions are to be handled in the dialog box that opens.

> **Note:**
>
> For more information about working with image versions, see the chapter Checking whether the media objects used are up-to-date ("Checking whether the images used are up-to-date" page 14).

6 Loading and editing comments from the Review Manager

> **Note:**
> To display and edit comments from the Review Manager using the InDesign Extension for BrandMaker, you have to download the InDesign document using the document wizard of the Web-to-Publish module. Using the Web-to-Publish Individualization Editor, open the Document Wizard (> *step 3, Edit document*). Choose > *More actions > Export to prepress document*.
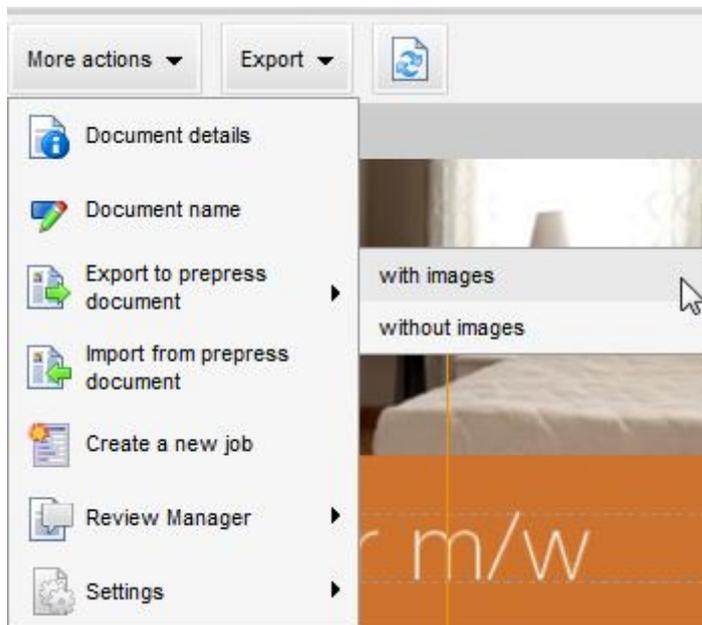
The InDesign Extension for BrandMaker provides you with the *Review Manager* palette in InDesign. You can display and edit existing comments from *Review Manager*.

1. Open a Web-to-Publish document in the document wizard (step 3 of the Individualization Editor) and choose *Export to prepress document*.

2. Click *Download*.

3. Open the downloaded document in Adobe InDesign.

4. Select a marker in the InDesign document in order to call the stored comments in the *Review Manager* palette.
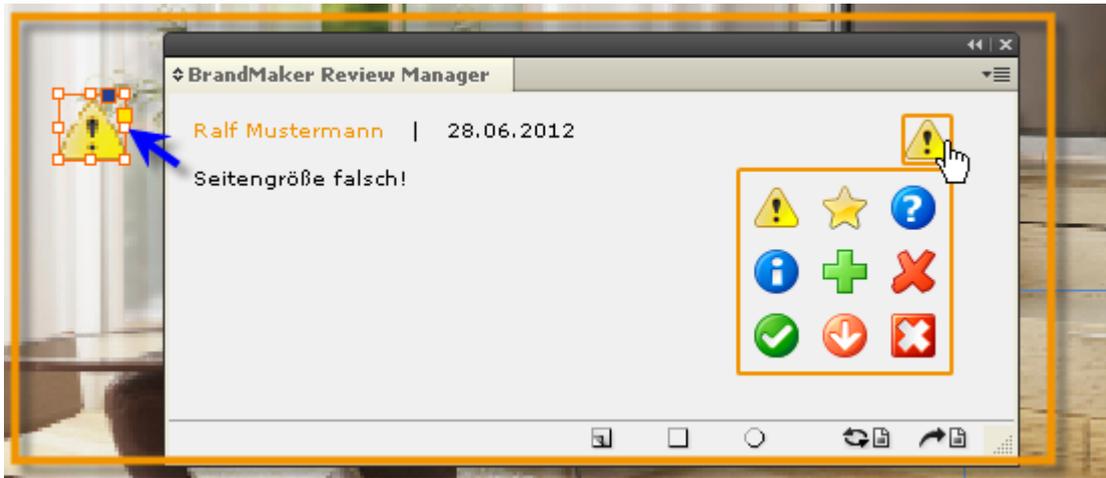
In the lower area of the palette, you can use the following functions:

Change marker	Click the marker icon in the palette to assign a different marker to the comment.
Create a new marker	Click the icon ▣ to create a rectangular marker and a new comment.
Create a new circular marker	Click the icon ○ to create a circular marker and a new comment
Update all markers in the document	Click the icon ↻▤ to reload all markers and comments.
Add a new comment	Click the icon ➚▤ to create a new comment for an existing comment.

> **Note:**
> Use the *Import from prepress document* function to transfer comments and markers created using the InDesign Extension for BrandMaker to the *Review Manager* module.

7 De-installation

If you are using a CS version, you perform the de-installation using the Adobe Extension Manager. Refer to the chapter 7.1 on page 26.

If you are using a CC version, the extension is uninstalled without using the Extension Manager. Refer to the chapter 7.2 on page 26.

7.1 CS versions

1. Open the Extension Manager.
2. In the InDesign Extension line, click *Remove*.
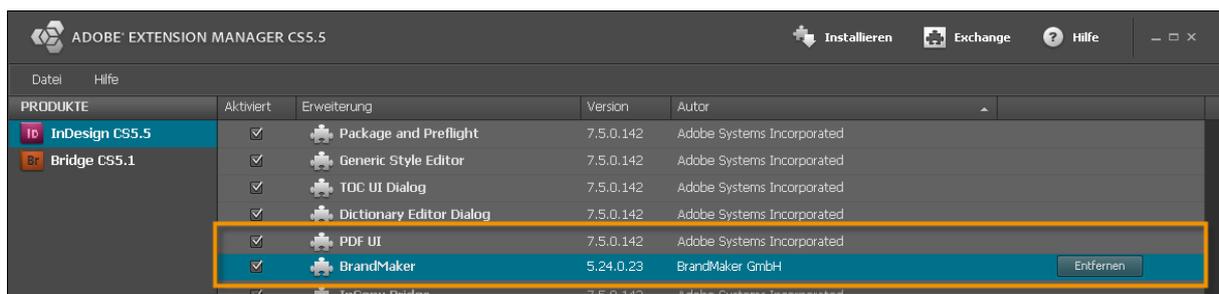
The InDesign Extension is uninstalled.

7.2 CC versions

You uninstall the InDesign Extension for CC versions from the control panel on your computer, for example, under *> Control Panel > Programs > Uninstall a program*.