



# Netrix iCMS Asset Manager Adobe InDesign CC plug-in

Version 4.1.6

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# 1. Overview

Netrix iCMS handles articles, which can contain text objects, images, tables, and styles.

An article can be created and stored in the editorial system (CMS) using its web-based interface. You can insert and manage article content in your InDesign document using the Asset Manager InDesign plug-in.

Articles are handled in an XML-tagged structure in your document. This means having separate text frames for your content elements (eg. Title, Body, Byline, Images, etc.) Once you have the structure, the article keeps its connection with the database and all changes are updated.

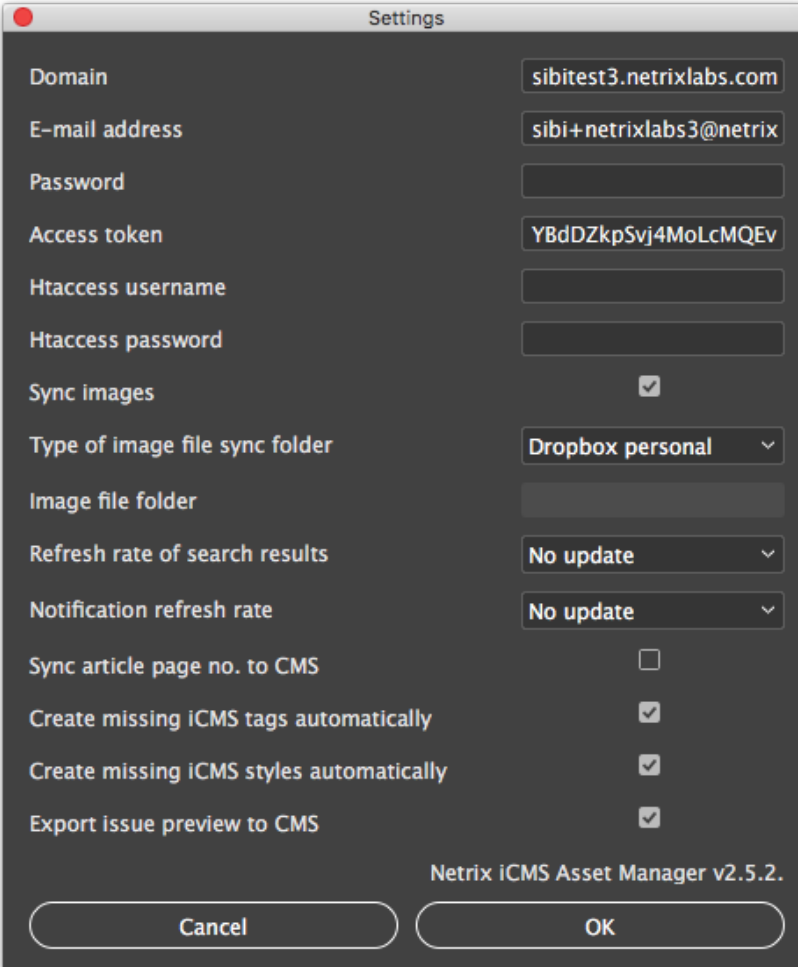
## 2. Getting started

### 2.1 Installing Netrix iCMS plugin

You can download the platform-specific installer from <https://netrixlabs.com/downloads/>. Launch the installer and follow the instructions. After the installation has finished, restart Indesign.

### 2.2 Connecting Asset Manager to the CMS

You can find the settings panel under **Window / Netrix iCMS Asset Manager Settings**.



The screenshot shows a 'Settings' dialog box for the Netrix iCMS Asset Manager v2.5.2. The dialog has a dark background and contains the following fields and options:

Domain	sibitest3.netrixlabs.com
E-mail address	sibi+netrixlabs3@netrix
Password	
Access token	YBdDZkpSvj4MoLcMQEv
Htaccess username	
Htaccess password	
Sync images	<input checked="" type="checkbox"/>
Type of image file sync folder	Dropbox personal
Image file folder	
Refresh rate of search results	No update
Notification refresh rate	No update
Sync article page no. to CMS	<input type="checkbox"/>
Create missing iCMS tags automatically	<input checked="" type="checkbox"/>
Create missing iCMS styles automatically	<input checked="" type="checkbox"/>
Export issue preview to CMS	<input checked="" type="checkbox"/>

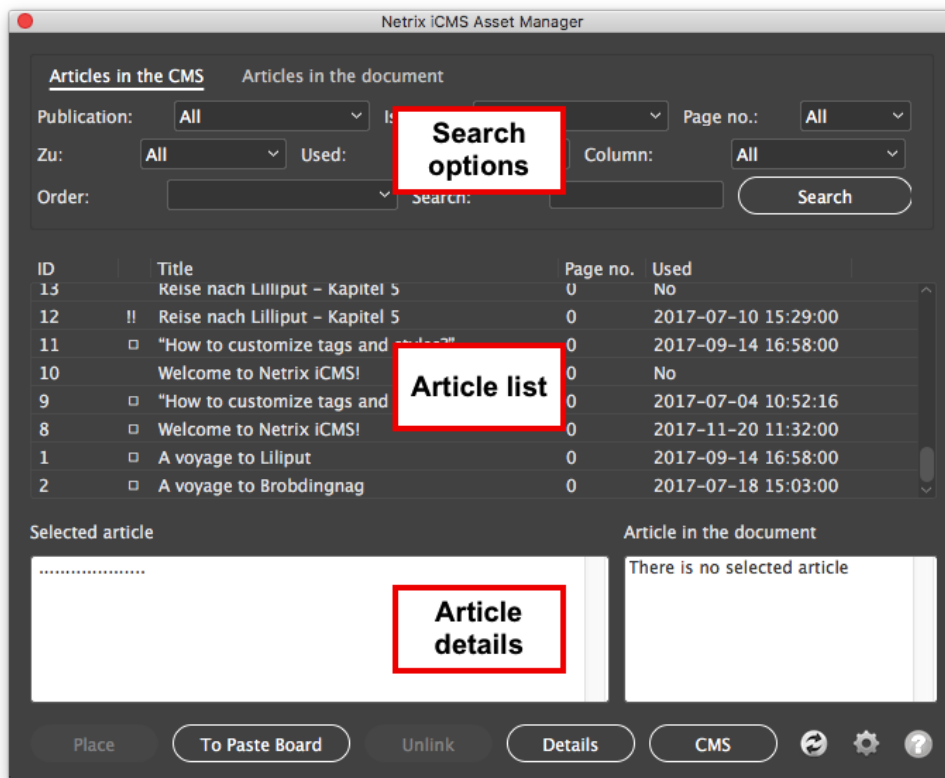
At the bottom right, it says 'Netrix iCMS Asset Manager v2.5.2.'. At the bottom, there are 'Cancel' and 'OK' buttons.

*Domain, e-mail address, password, htaccess username/password*

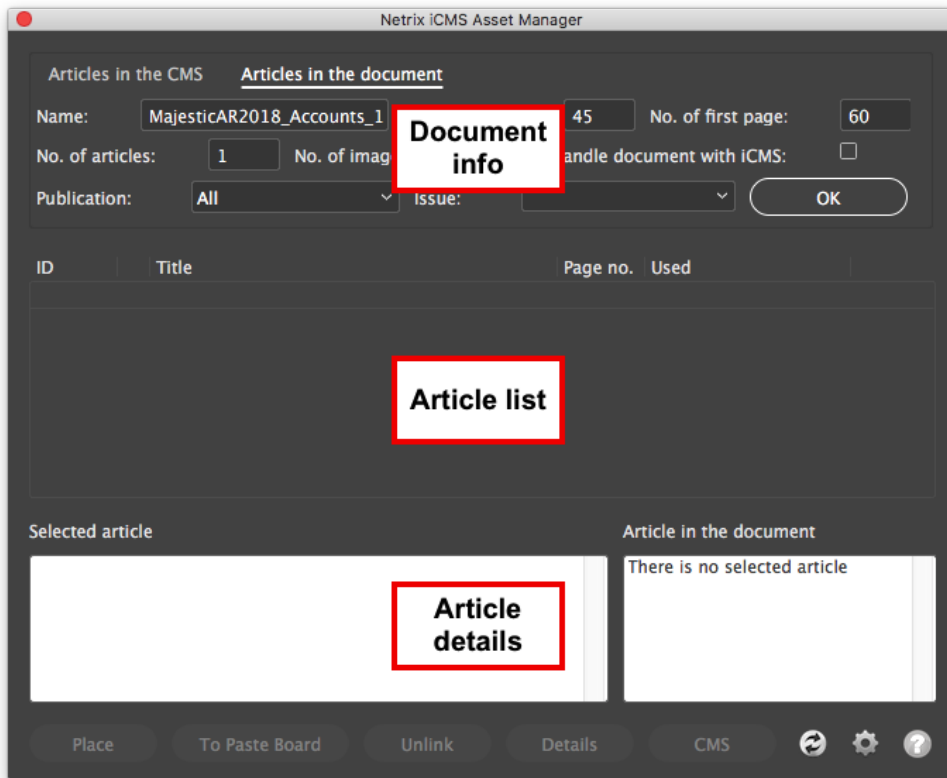
These fields contain your login credentials to the Netrix iCMS server. To connect, fill these fields with credentials given by your CMS system administrator.

## 2.3 iCMS Asset Manager window

You can find the Asset Manager in InDesign „Window/Netrix iCMS Asset Manager“ menu. In this window you can see the articles that are currently in the CMS database.



- *Search options*: search criteria to filter articles from the database
- *Article list*: list of CMS articles which are matching to the search criteria
- *Article details*: here you can see the details of the selected article



Articles in the document tab:

- *Document info*: basic information of the Indesign document
- *Article list*: list of articles which are already placed in this document
- *Article details*: here you can see the details of the selected article

## 2.4 Search and list from the CMS

Articles in the CMS database can be searched and filtered with the fields on the upper part of the window. The list displays all the articles that match your search criteria.

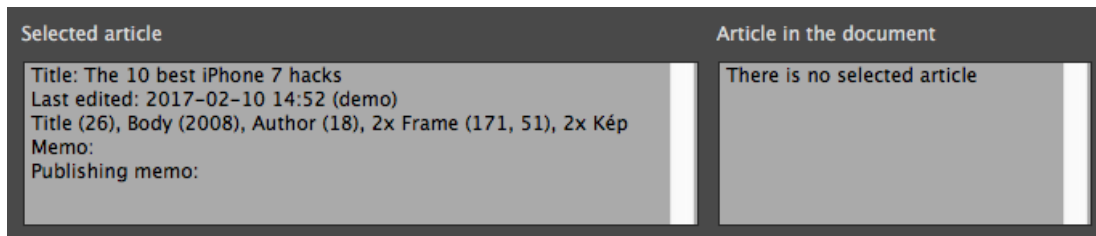
ID		Title	Page no.	Used
106156	□	The 10 best iPhone 7 hacks	0	2017-02-17 10:32:00
106155		It Might Be the Best Time To Take a Trip...	0	No
106105	!!	Egy nap a nemzetin: szegedi pillanatkép...	2	2016-10-28 16:11:00

### Columns in the list:

- *ID*: unique identifier number of the article
- *(status)*: indicators for the status of the article
  - *Square filled*: the article is inserted in the actual document
  - *Empty square*: the article is inserted but in another document

- *!! (two exclamation marks)*: article has been modified since the last insertion
- *No indicator*: article is not yet inserted to any document
- *Title*: the title of the article
- *Page no.:* the planned page number for publishing.
- *Used*: indicates if an article has been inserted into a document, and when.

## Selected article



The selected article part of the window has two fields:

- The left one shows data for the selected article in the list above.
- The right field show data for the article selected in the InDesign document. It can be:
  - “Empty article”, which indicates a ready structure with no article yet;
  - Article data for an already placed article, or a part number for multipart articles.

## 2.5 Inserting an article from the CMS to the InDesign document

1. *To Paste Board*: this function places the article selected in the list to the actual page of the document, to the left pasteboard. You can then format and edit its text fields. The database connection for the article is set.
2. *Place*: this function places the article to the actually selected textboxes in the document, keeping the formatting of the boxes, as a template. You have to select at least one text box to place. The text boxes and all the elements of the article template must be structured and tagged correctly in the InDesign „Structure (Alt-Ctrl-1)“ window. (See details in section 3.)

### Other operations

3. *Unlink*: disconnects the selected article from the CMS database. The changes in the article will not be synced from this point.
4. *Details*: Article data fields and metadata can be inspected/edited in this window.
5. *CMS*: Opens the article in the CMS web interface.
6. *Refresh*: refreshes the article list. (Refresh is also automatic by 5 minutes.)
7. *Settings*: Set login credentials and other parameters for the plugin.

### 3. Structure of the InDesign document

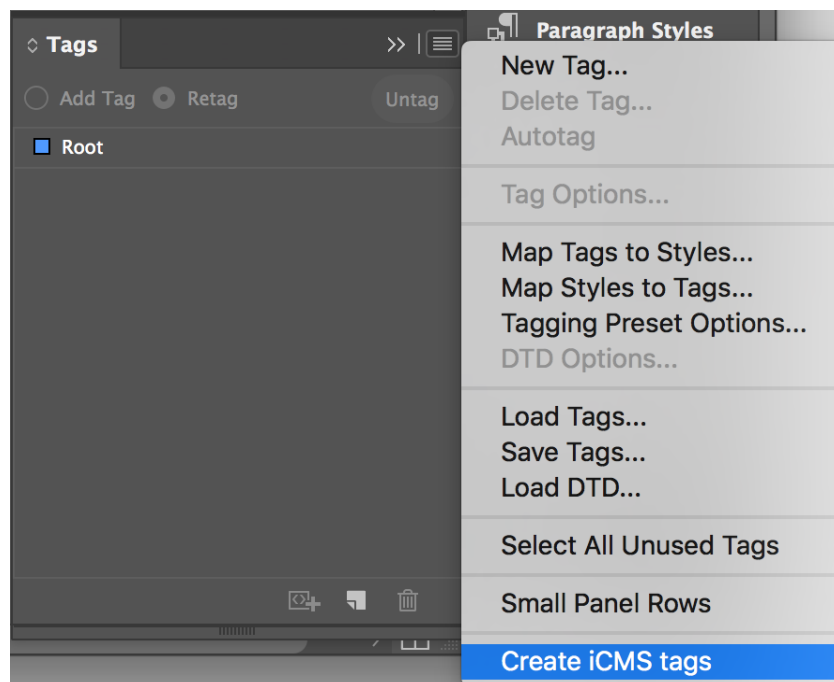
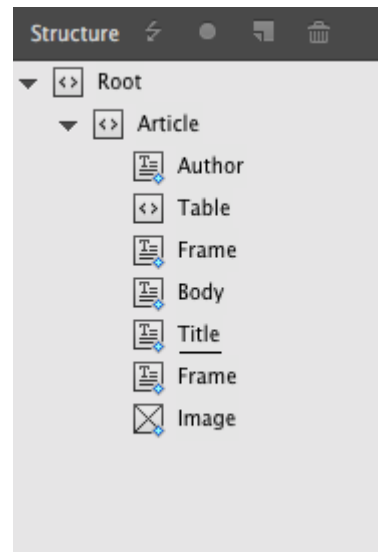
To handle articles, it is needed to have separate text boxes for the article elements (title, lead, subtitle, body, author...). It is also needed to have these elements tagged, in the same structure.

To see the structure of the document you can use the “Structure” panel (“Alt-Ctrl-1”). It is recommended to keep this panel open.

To create a structure, first create the text boxes of the article and **tag them** by selecting the appropriate tags in Indesign’s tags window (Window / Utilities / Tags) one by one.

Then, select all of the frames at once and in the right-click context menu select “**Make article from selection**”. This will arrange elements in the correct structure. That’s it!

If you don’t see the iCMS specific tags (article, title, lead, etc.) in the tags window, you can create them by clicking on the “Create iCMS tags” menu item on the tags panel’s submenu.



If you want to insert articles from the CMS to a template with the “Place” button, you need to create the above structure in advance. The “Place” function finds the structure and tags and knows where to put the appropriate content. You can also create a template system with master pages and library items, so the tagging is done only once.



If you insert an article with the „To Paste Board“ button, then there is no need to create any template or setting. It will create the correct tagged structure automatically.

You can also enable the plugin to create automatically the tags list for every document you have opened. For this setting, see section 5.1.

## 4. Updating articles

### 4.1. From the CMS

Updating changes from the CMS is done by clicking the **Update** button in Asset Manager, or right-clicking the article and “**Update article contents from CMS**”.

### 4.2. To the CMS

Updating is done automatically in the event of saving (Ctrl+S), or can be done manually by selecting “**File / Sync Articles to CMS**” or right-clicking any article and selecting “**Sync Article to CMS**”.

### 4.3. Full update / full sync

Normal update options sync only the contents changed since the last update. Full update always syncs all data.

## 5. Other functions

### 5.1 Adding new fields to an inserted article

If you want to add new elements (for example text frame, image) to an already placed article, it is important to do this in a structured way. You have to drag the newly created element to the structure panel, to the appropriate article, and select a tag (for example Frame, Image). The new tagged object will become part of the article and be saved to the CMS from now on.

*Note: if you add new objects to the article and do not tag them, these will not be saved in the CMS, only in the InDesign document.*

### 5.2 Handling text frames

Text frames can be created and stored separately, in the CMS web admin “Add new field” function. These fields will become separate text boxes in the InDesign document. If there are „frame“ tagged textboxes in the documents, contents will appear in them. If there are no such tagged boxes, new text objects will be created in the center of the page and those can be moved and formatted.

### 5.3 Handling images

Images can be attached to the article in the web admin, “Media Library” panel and the “Featured images” tab. These images will appear in the image boxes tagged as „image“. If there are no such tagged boxes, new image objects will be created in the center of the page and those can be moved and formatted.

### 5.4. Details, page number and issue

In the AssetManager plug-in, by selecting an article in the list and clicking “Details”, you can inspect all the content and metadata of it. The metadata fields are editable. After designing the final issue pages, it is recommended to set the fields “issue” and “page number” to the correct value, for archiving, and accounting purposes.

Article: The 10 best iPhone 7 hacks

Issue:  Page no.:  Used:

Column:  Start date:  Seen by proofreader:

Memo:  Publishing memo:

ID

Last change

Title (tag: Title)

Body (tag: Body)

Author (tag: Author)

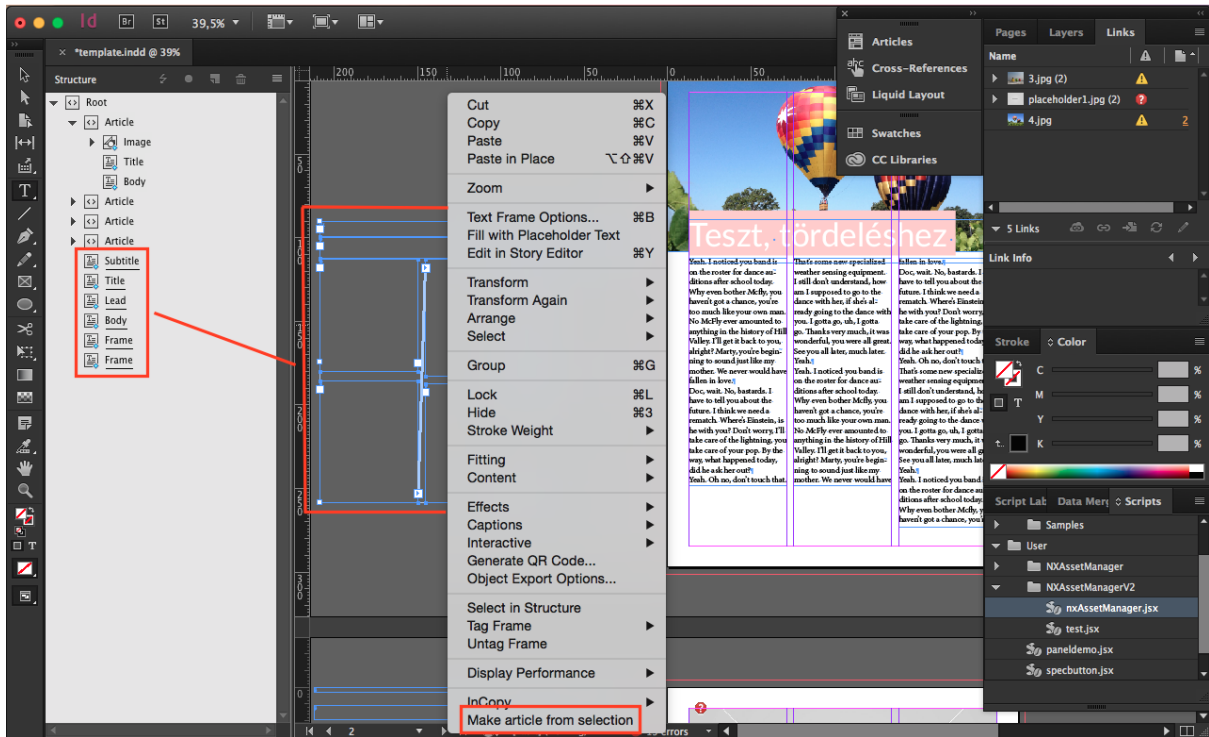
## 5.5. Revoke article

Articles that are displayed in the AssetManager plug-in have a status of “Live”, “Published article”. These articles can not be modified in the CMS web admin, only in the InDesign document. To revoke and give an article back for editing it is recommended to revoke it on the web admin, with the “Revoke” button.

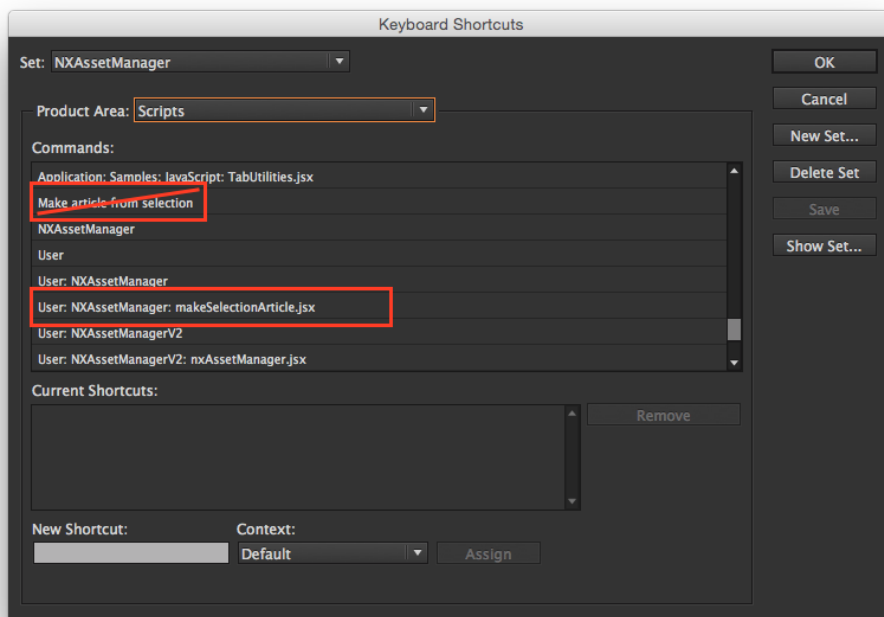
The revoked, modified and re-submitted article is indicated with a “!!” icon.

106123	New skool text editing	0	No
106125	■ Teszt, tördeléshez (local news)	0	2016-12-12 14:44:26
106132	!! Teszteljük a többreszes cikket	0	2016-12-12 16:01:00
106133	□ Content új	0	2016-12-14 11:41:00

## 5.6 Keyboard shortcuts

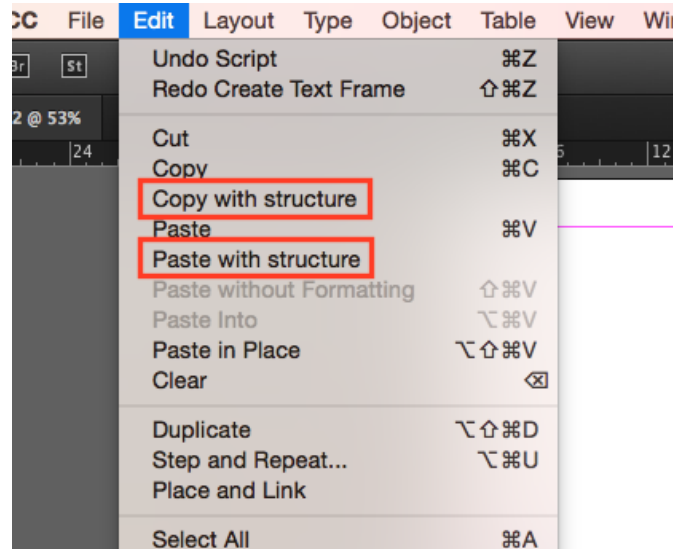


The function “Make article from selection” can be assigned to a keyboard shortcut. In the “Scripts” section you have to tie the shortcut to the command “User: NXAssetManager: makeSelectionArticle.jsx”.



## 5.7 Copy with structure

In the “Edit” menu, you can find options for copying and pasting articles together with their tags, structure and CMS connection.



These can be tied to keyboard shortcuts. Assign “User: NXAssetManager: copyWithStructure.jsx” and “User: NXAssetManager: pasteWithStructure.jsx” scripts to shortcuts.

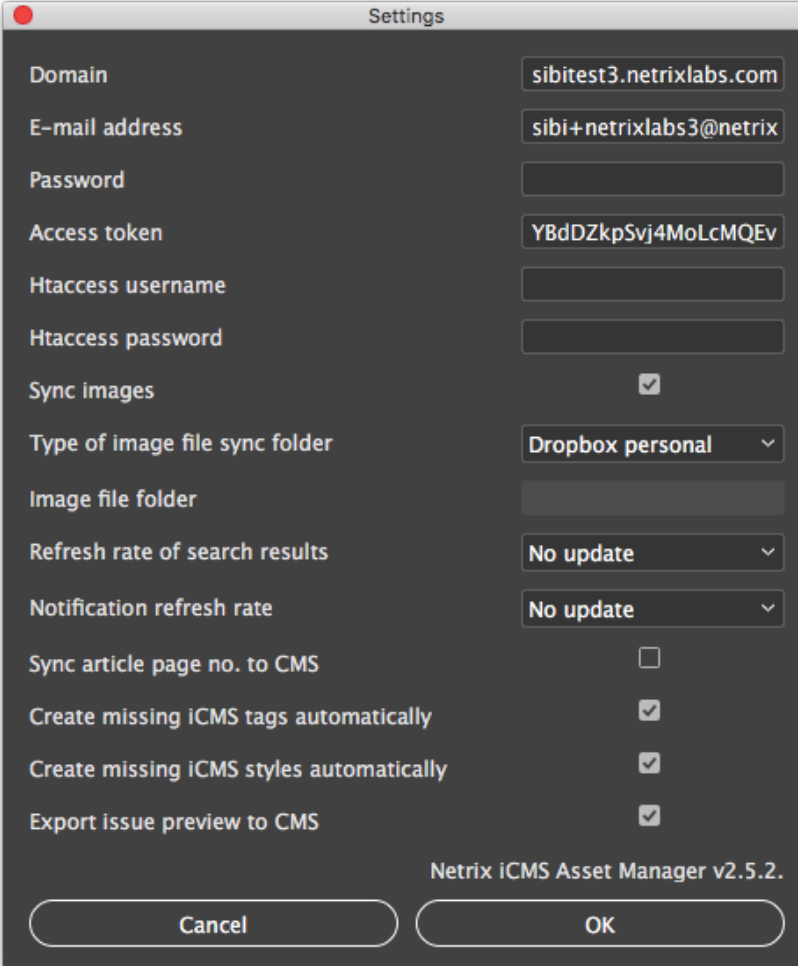
## 5.8 Quick select article in the document

In the Asset Manager Window, double-click an article in the list to see its inserted place in the active document.

ID	Title	Page no.	Used
106125	■ Tesztcikk címe (beillesztve ebbe a dokumentumba)...	3	2016-12-14 15:43:26
106132	!! Tesztcikk címe (CMS-ben módosított cikk)...	4	2016-12-12 16:01:00
106133	□ Tesztcikk címe (másik dokumentumba beillesztett...	6	2016-12-14 15:43:00
106134	Tesztcikk címe (nincs felhasználva)	1 + 8	No

## 6. Settings

### 6.1 Settings panel



The screenshot shows a 'Settings' dialog box with the following fields and options:

Field Name	Value / Option
Domain	sibitest3.netrixlabs.com
E-mail address	sibi+netrixlabs3@netrix
Password	[Empty]
Access token	YBdDZkpSvj4MoLcMQEv
Htaccess username	[Empty]
Htaccess password	[Empty]
Sync images	<input checked="" type="checkbox"/>
Type of image file sync folder	Dropbox personal
Image file folder	[Empty]
Refresh rate of search results	No update
Notification refresh rate	No update
Sync article page no. to CMS	<input type="checkbox"/>
Create missing iCMS tags automatically	<input checked="" type="checkbox"/>
Create missing iCMS styles automatically	<input checked="" type="checkbox"/>
Export issue preview to CMS	<input checked="" type="checkbox"/>

Netrix iCMS Asset Manager v2.5.2.

Buttons: Cancel, OK

#### *Domain, e-mail address, password, access token, htaccess username/password*

These fields are the login credentials to the Netrix iCMS. If you have registered or logged in in the way as shown in the 2.2 section, these fields are filled in on the proper way. You have not any task with them. In case of on-premise installation, your local system administrator will provide the values of these fields.

#### *Sync images, type of image sync folder*

If you want to synchronize your images between the CMS and the Indesign document, you have to turn on the “sync images” option.

#### *Refresh rate of search results*

The time interval between two refreshes of the search results.

### *Notification refresh rate*

If you enable this setting, you will receive notifications if a new article is created in the CMS which matches to the previously set search criteria. You will get these notifications even if the Asset manager window is closed.

### *Sync article page no. to CMS*

If enabled, the plugin sends back to the CMS that on which document page did you place the article.

### *Create missing tags automatically*

If you enable this setting, the plugin automatically adds the iCMS tags to the opened document. Not recommended if you are working documents which are not handled by the iCMS.

### *Create missing styles automatically*

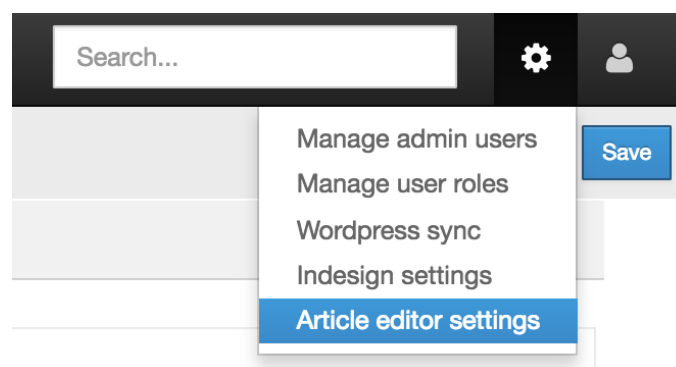
If this setting is enabled, the plugin automatically adds the missing styles to the document when you place an article.

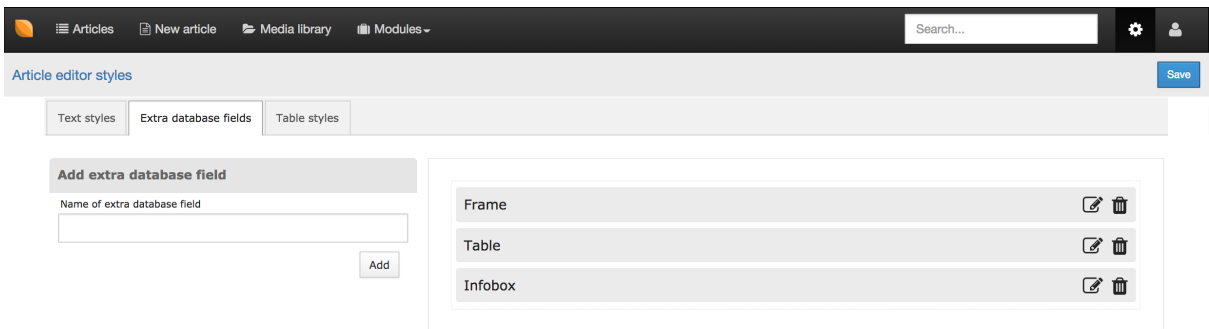
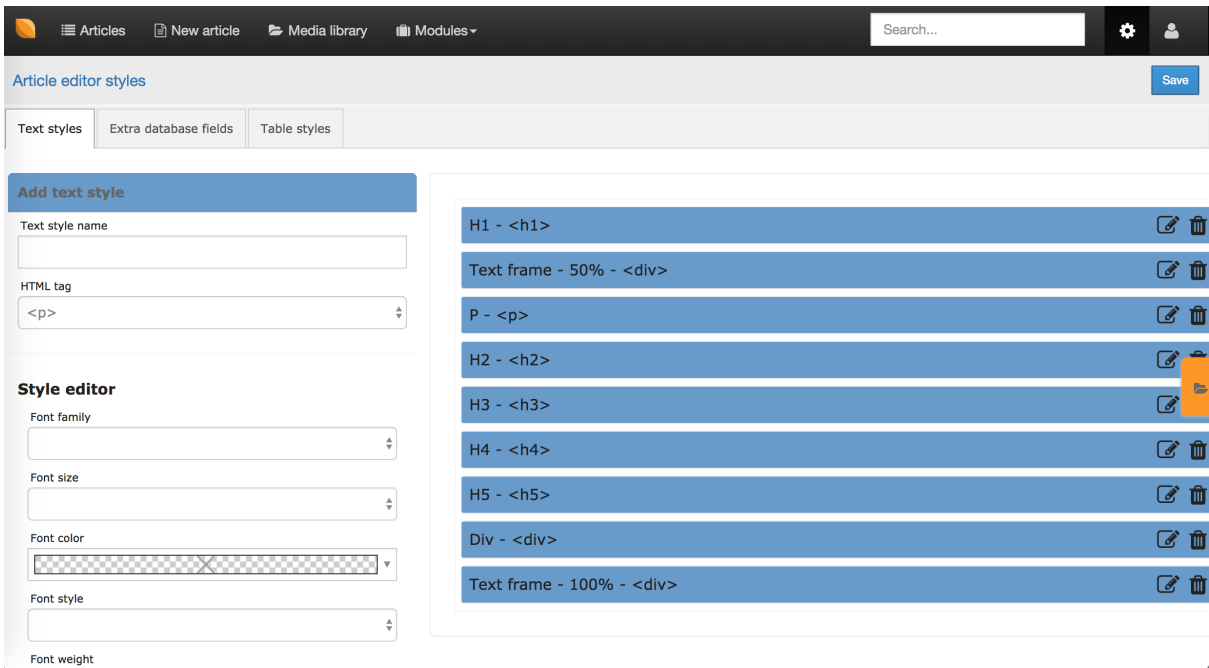
### *Export issue preview to the CMS*

If this setting is enabled, the plugin creates and uploads a PDF preview of the articles to the CMS upon document save.

## 6.2 Style handling, formatting

Style conversion: by default the paragraph and character style definitions in InDesign will become <p> and <span> markups on the web database, with the same class name as the style. For more specific conversion, you can set assignments in the CMS on the “Article editor settings” page. You can find this under the “gear” icon on the top right side of the page.





Under the “Text styles” and the “Table styles” tab you can add your own paragraph, character and table styles and set their online appearance. In order to make the style synchronization between the CMS and the Indesign document flawless, you have to create all the styles you are using in your documents.

Under the “Extra database fields” tab you can add extra, WYSIWYG editable fields to the article editor. These fields also can be placed in the Indesign documents with their own tags.



## 7. Troubleshooting

### 7.1. Articles do not fully sync from the CMS to the Indesign document

- Check if all the frames are tagged and are in the right structure.
- Right-click the article in Indesign and select "Update article contents from CMS (full update)".
- Unlink, then select all elements of the article and in the right-click context menu select "Make article from selection". This re-creates the correct structure in the document. Then Place the article again.

### 7.2. Some article elements do not upload to the CMS

- Check if all the frames are tagged and are in the right structure.
- Select "Full sync" in the File menu - this forces Asset Manager to upload all tagged frame contents to the cms.

### 7.3. Plugin Reset

Asset Manager stores its settings and data in the following folders:

Windows: <user home>/AppData/[Local|Roaming|LocalLow]/NXAssetManager/data/

Mac: <user home>/Library/Application Support/NXAssetManager/data/

Deleting these folders resets all plugin settings to the defaults.

(Using Windows there are 3 subfolders under AppData (Local, Roaming, LocalLow). Storage folder depends on local policies, but most commonly settings are under Local)."

### 7.4. Logs

To access Asset Manager's logs, you can look for:

Windows <user home>/AppData/[Local|Roaming|LocalLow]/NXAssetManager/logs/

Mac: <user home>/Library/Application Support/NXAssetManager/logs/

(Please send the whole logs folder if needed.)