

Adobe InCopy and InDesign 2021 Collaborative Editorial Workflow

Executive overview

Effective publishing demands tightly choreographed collaboration among editorial groups and design groups working against ever-present, urgent deadlines. With a more efficient workflow, editorial and design professionals can devote more time to the quality of the work and less to the mechanics of the publishing process.

Regardless of company size, a large number of publications are created by small, tightly knit teams of editors and designers. Publications created by fairly small workgroups need an efficient workflow but often make do with a combination of Microsoft Word, a page layout application, and many rounds of paper proofs. Because these tools and techniques are not designed for tight collaboration, combining them in editorial workflows often leads to delays, inefficient workarounds, and compromised quality.

Adobe InCopy software is a professional writing and editing program that integrates tightly with Adobe InDesign software to deliver a complete solution for collaborative editorial workflow for any size publishing workgroup. InCopy lets writers and editors simultaneously develop their individual stories directly in the InDesign layout, even while the designers are working on the same layout in InDesign. Because InCopy and InDesign use the same technology for composing text and displaying graphics, writers, editors, and designers can visualize exactly how copy and layout interact—throughout the workflow, rather than just at the end.

This guide explains how using InCopy and InDesign together reduces review-and-revision cycles between editors and designers, improves editorial control over copy, and gets publications to market faster. It also provides a step-by-step overview of how to set up an effective InCopy workflow that's easily customized for your workgroup's needs.



Bridging the gap between editorial and design

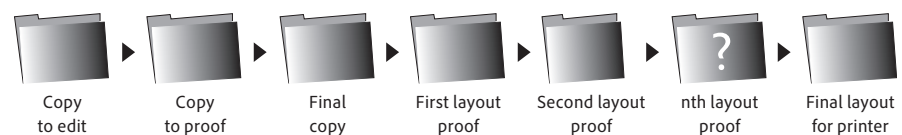
An ideal workflow enables everyone to focus on his or her own work without being slowed down, rushed, or hindered by others. However, publishing teams often devise an approach to working together that is less than ideal.

Conventional publishing workflows: Linear and iterative

Many of the challenges faced by smaller publishing workgroups stem from the lack of an integrated workflow solution. They combine word processing and page layout applications from different vendors instead. Although both types of applications are well suited for their respective purposes—developing copy and designing pages—they are not conducive to seamless collaboration. In particular, writers and editors cannot see copy in the context of a layout until it is placed in the page layout application. Once it is, they can no longer work on it directly. Neither editorial nor design has an easy way of assessing precisely how their work will come together: how the copy will fit the layout or how images and other design elements will complement the copy.

To solve this problem, various workarounds have become standard practice. These workarounds often include numerous hard-copy proofs marked up by editors and submitted to the designer, who then makes the required changes in the layout. This editing cycle can be repeated multiple times, resulting in additional material costs, and more important, a significant decrease in efficiency and job satisfaction.

Conventional linear workflow



Content is developed "blind" with respect to the publication's layout file. Only after the layout proofing rounds begin can editors fix copyfitting problems.

Editors lose direct control of the editorial process, and designers are forced to serve as their eyes and hands. Frustration can be high, errors are common, and quality may suffer.

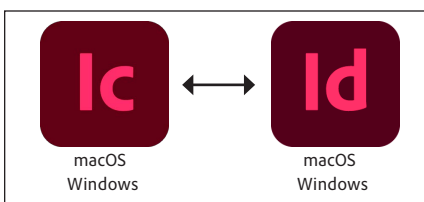
If editorial and design proceed concurrently, without the right collaboration tools in place, editorial may produce copy that's too long, too short, or poorly suited to its visual context. Design may produce layouts and graphics that don't complement the copy, or they lose precious time reformatting content when stories are updated. Also, editors may hover over designers, making over-the-shoulder copy corrections.

The InDesign and InCopy workflow: Concurrent and collaborative

Implementing an InDesign and InCopy workflow transforms the production process by making it easy for editors and designers to work together.

Using InDesign, the designer makes layout content editable by InCopy users by putting individual spreads or the complete document on a networked file server. Using InCopy on their local computers, one or more editors can open this file from the server at the same time, editing their stories within the layout, without having to wait for a printout.

As editors save their changes to stories in the layout, the system keeps everyone else who's working on the publication up to date with their revisions. Since InCopy users are working in the live layout file, they can "write to fit" (or edit to fit) from the start, dramatically reducing the number of proofing rounds required.



A cross-platform solution

InCopy for Windows flawlessly opens InDesign files created on a Mac and vice versa.

A powerful tool for editors

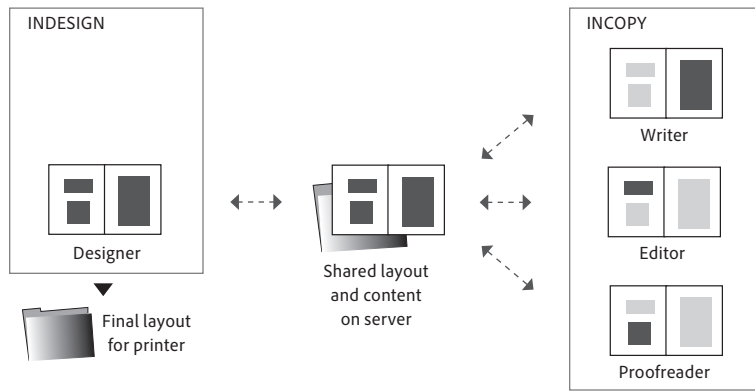
InCopy delivers an impressive array of power-user tools in a user-friendly package. Here is a brief overview:

Parallel workflow—Accelerate production by working simultaneously instead of in sequence. Designers can work on an InDesign document while writers edit the same document’s text in InCopy, without fear of overwriting one another’s work.

Page visualization—Write and edit to fit the layout precisely. View accurate feedback on the status of copyfitting, line endings, and hyphenation, or simply view a story as it appears on the original page layout. Writers are notified of changes to the InDesign layout so they can copy-fit as needed to a changing design.

Productivity—Meet deadlines more efficiently using editorial features such as a powerful Find/Change command; extensive paragraph, character, and table styles; dynamic cross-references; and support for rapid editing and formatting using only the keyboard.

InCopy and InDesign parallel workflow (simple overview)



The designer places the InDesign layout on a central file server. Text and image frames in the layout are assigned for review and editing to a contributing member of the editorial workflow. Multiple InCopy users can open spreads and edit content from the same layout file concurrently while it’s on the server, even if the designer has it open in InDesign.

However, to protect the integrity of the design, InCopy allows editors to edit only the contents of text and image frames that the designers have designated as editable in the layout. Editors cannot change page geometry (move or resize frames, add or delete frames or pages, apply text wrap, and so on). While they can apply local text formatting and any text styles that are associated with the layout to their stories, editors cannot add, delete, or modify any of the styles. If the designer is working on the same layout concurrently and saves changes to it in InDesign, any editor who has it open in InCopy is notified that the design is out of date. Choosing File > Update Design in InCopy immediately refreshes the layout to reflect the latest state of the publication, without losing any of the InCopy user’s edits.

When the editors have completed their work on the stories and the designer has updated all the InCopy content in the layout, the file is ready for preflighting and handoff to a commercial printer.

	Off-the-shelf InCopy and InDesign	Third-party developer solutions that add structure and features to the InCopy and InDesign workflow	SI enterprise-level production and management systems with InCopy and InDesign at the core
Cost of entry	Low	Moderate	High
Workgroup size (per publication)	2–15	5–30	15–100+
Technology infrastructure	Folders and files on a networked file server	File server or simple database running on the file server	High-end database running on a dedicated database server
Customizable UI	Yes	May be enabled	May be enabled
Extensible	Minimal	Minimal	High
Support services	Standard	Varies	High
More information	www.adobe.com/incopy	www.adobe.com/products/plugins/incopy	www.adobe.com/products/incopy/integrated

Selecting the right implementation of InCopy

Large publishing workgroups tend to invest in highly structured workflows supported by features such as automatic routing, user roles, and database reporting. Because smaller workgroups don’t need this kind of structure, InCopy paired with InDesign provides a simple, flexible solution that enables team members to work in parallel without interfering with one another’s work. The basic InCopy and InDesign workflow is ideal for project teams of 2 to 15 people, such as small to midsize book publishers, weekly newspapers, corporate communications teams, and monthly magazine publishers. Consult the table at the left for guidance on selecting the right way to integrate InCopy based on the size and complexity of your organization.

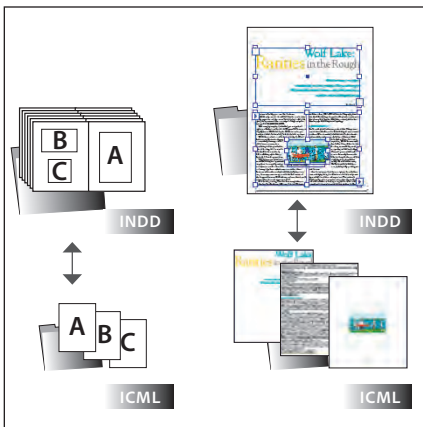
Moving to an InCopy workflow

Making the transition to an InCopy workflow is surprisingly easy and flexible. InDesign contains all the tools necessary for design and production staff to participate in the workflow, so all that's needed is to install InCopy on the editorial workstations. InCopy can be flexibly integrated with any stage of the editorial process. An editor may begin composing a story directly in InCopy (in a standalone InCopy file or an empty placeholder text frame in the layout file) or may choose to import finished content created in Word and use InCopy only for late-stage copyfitting in the layout.

Publishers with a local network file server can choose to implement a layout-based workflow, an assignment-based workflow, or a combination of the two. To accommodate off-network InCopy users, or if no local server is available, remote workflows can be set up with email-based assignments. These options, described in the following paragraphs, allow publishers to customize their workflow based on the speed of the local network, the size of the layout files, the number of editors involved in the same project, and whether users are on- or off-site.

Layout-based workflow. The most straightforward way to implement an InCopy workflow is to place the InDesign layout (INDD) file on a local network file server and have all publication staff work with it directly off the server. Designers open the file over the network in InDesign. Editors and writers open the same InDesign layout over the network with the File > Open command in InCopy, allowing them to see and edit their stories "live" in the actual layout. One InDesign user and one or more InCopy users may open and work on the same layout file concurrently.

Initially, an InDesign layout file is read-only when opened in InCopy. To make content editable for InCopy users, the designer needs to export the layout's text and image frames to InCopy content (ICML) files, saving them on the server in a project subfolder. The layout's content (text and images) is now linked to the exported files. Editors can open the layout in InCopy and edit the content in the linked frames. A built-in check-in/checkout system prevents more than one user from editing the same content in the layout at the same time.



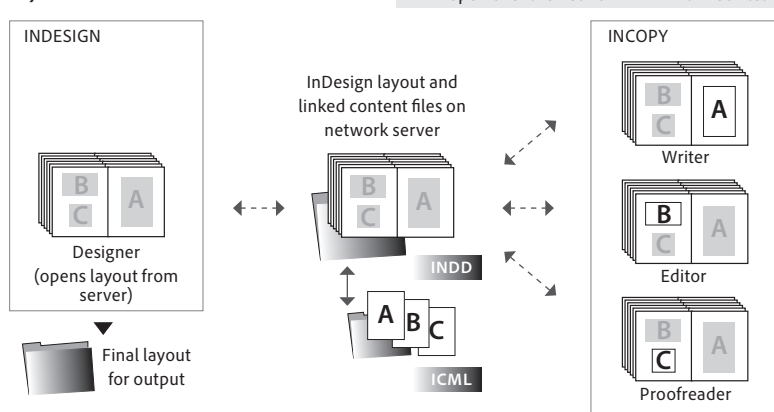
Understanding linked content (ICML) files

Most content in an InDesign layout (INDD) file is contained in a text or image frame. Designers create these frames, position them on the page, and fill them with text or graphics using InDesign tools. Some frames may be empty "placeholders," awaiting content.

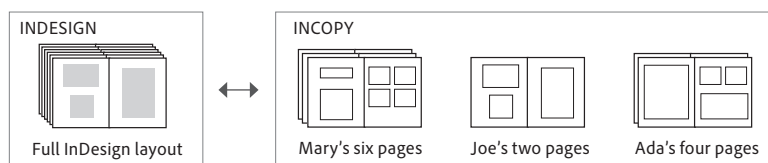
In the InCopy workflow, designers can export the formatted contents of any text or image frame, or even an empty one, to an external InCopy (ICML) file. This creates a dynamic link between the ICML file and the content in the source frame in the INDD file.

Only the contents of linked frames (those that are linked to external ICML files) are editable by InCopy users. Other frames' content that the designer did not export, such as page folios and background images, are visible in the InCopy layout view, but are not editable.

Layout-based workflow



Assignment-based workflow. Assignment (ICMA) files are subsets of full InDesign layout (INDD) files, often containing only one or two spreads from a much larger InDesign document, and so are faster to open over the network. Even if network speed is not an issue, assignments allow the designer to provide editors with a single document containing only the content for which they are responsible.



Multiple InCopy assignment (ICMA) files can be created and managed from a single InDesign layout file. Here the designer has exported three assignments, one for each of the editors working on the publication.

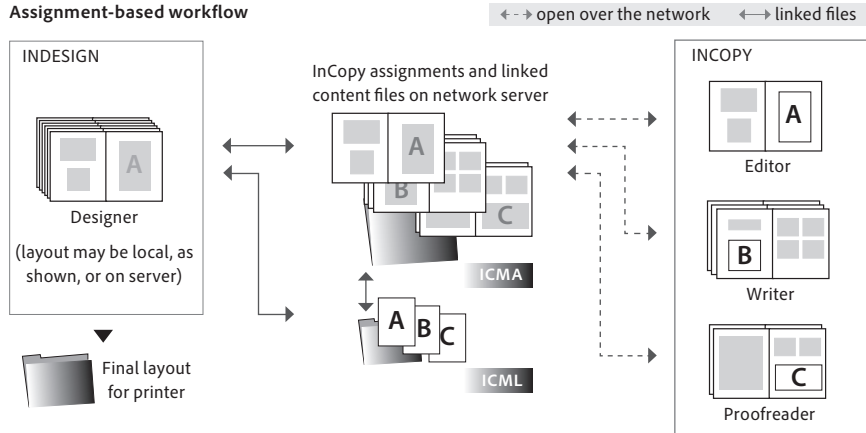
About file types

The InCopy workflow entails working with three main types of files (in bold) and three others that are used in special situations. Each type has its own filename extension to distinguish it in the operating system, the InCopy Story bar, and InCopy and InDesign status messages.

INDD	The InDesign layout, containing a mix of native, embedded, and linked page elements in frames.
ICML	The native format for InCopy documents. When the content of a text or graphics frame in InDesign is exported from the InDesign layout to InCopy format, the resulting ICML file is known as a "linked content file" because it's linked to the layout.
ICMA	An InCopy assignment file, containing layout previews from a subset of the InDesign (INDD) file and full editorial access to the linked content (ICML) in the text and image frames the designer associated with it.
ICMT	An InCopy template for a standalone ICML file.
ICAP	An InCopy package file used in remote workflows, containing an assignment (ICMA) file and all its associated ICML files.
IDAP	An InDesign package file used in remote workflows, containing an ICMA file and its associated ICML files.

Assignments are easy to create. Using the InDesign Assignments panel, the designer sets up assignment files by exporting to a new assignment the text and image frames for a specific editor. InDesign automatically creates assignment and content subfolders in the layout's project folder on the network file server. It saves new ICMA files in the assignments subfolder, and from the frames selected by the designer, it exports linked ICML files to the content subfolder. Editors open their own assignment files in InCopy to edit their content. The same check-in/checkout system prevents the designer from modifying a frame's content while an editor is working on it, and vice versa.

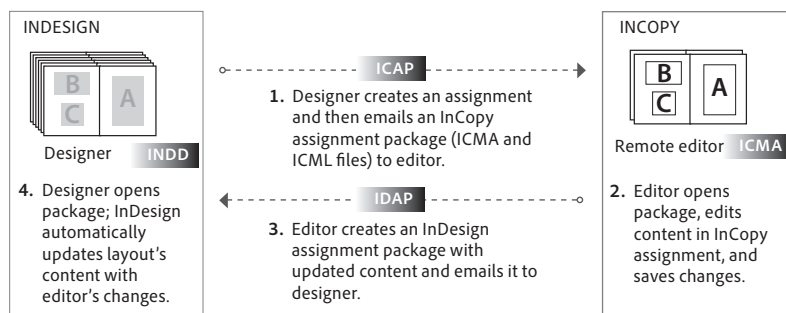
Assignment-based workflow



Remote workflow. If an editor is off-site and cannot access the file server, or if a publishing team doesn't have access to a central file server, InCopy can be used remotely. This solution requires the use of assignments for any editor who is working remotely, even if the workgroup is using a layout-based workflow locally.

After creating an assignment for an editor, the designer chooses the Package For InCopy command in InDesign, which creates a single, compressed ICAP file that can be emailed to the editor or uploaded to an FTP server. The package file contains everything an InCopy user needs to view the layout and edit content within it, including the assignment file and all the linked content files associated with it. When the designer packages an assignment, the system also checks out all its content from the local server on the remote editor's behalf, preventing local users (including the designer) from editing the content while it's being worked on by the off-site editor.

Remote workflow (email-based assignments)



When the remote editor opens the packaged assignment on his or her own computer, the file automatically unpacks itself, opening the assignment file in InCopy and allowing the editor to edit its content. When finished, the editor can use the same procedure for packaging the assignment and modified stories into a single file and sending it off, either to another editor as an InCopy package (ICAP) file or back to the designer as an InDesign package (IDAP) file. When the designer receives and opens an IDAP file, it automatically unpacks itself, checks the content back in, and allows the designer to update the layout with the editor's changes.


Step-by-step InCopy workflow examples

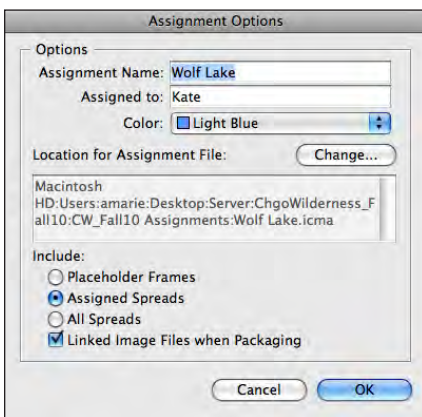
Chicago Wilderness magazine: Current issue

Chicago Wilderness is a 124-page, full-color, quarterly magazine offering its outdoor enthusiast subscribers in-depth articles about Chicago-area wilderness destinations, news about nature conservancy efforts, and colorful wildlife photography.

In this step-by-step scenario, a designer named Peter, a writer named Kate, and a copyeditor/proofreader named Gina are working on the fall 2021 issue. Since the InDesign layout is a single, 124-page file on the server, too large for the editors to comfortably open and work on over their network, *Chicago Wilderness* uses an assignment-based workflow. Kate will write copy for the feature on restoration efforts at nearby Wolf Lake. Peter, the designer, needs to create an InCopy assignment for her that includes all the elements in the article.

Set up an assignment in InDesign

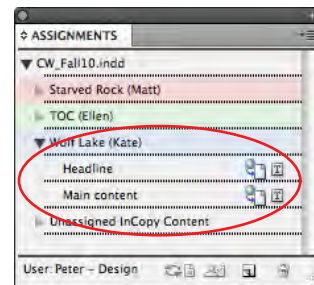
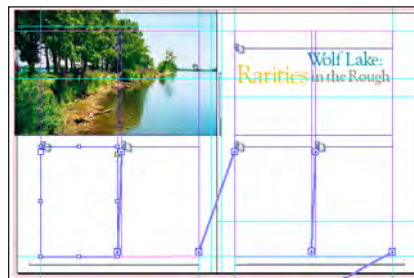
In InDesign, on the four pages in the layout allotted for the Wolf Lake story, Peter roughs out a design with images and placeholder text frames and then selects frames from the first spread and drags them on top of the New assignment icon  at the bottom of the Assignments panel. He names the assignment "Wolf Lake" and clicks OK (see sidebar at left). InDesign automatically saves this file in the project's assignments folder, CW_Fall19 Assignments, which it created and named based on the name of the InDesign layout. The exported ICML files, one for each content frame Peter included in the assignment, are automatically saved to a content folder within the CW_Fall19 Assignments folder.



About assignment options

An assignment includes an assignment name, the name of the InCopy user who will work on the assignment, and a color for identifying assigned frames in InCopy and InDesign. Additional controls determine how much context a writer or editor sees when working on an assignment:


- **Placeholder Frames** creates an assignment that includes all spreads containing assigned frames. However, only assigned frames display their text or graphics content and can be checked out; all other frames appear empty. For writers and editors who prefer to focus exclusively on their content, this option eliminates nonessential information.
- **Assigned Spreads** creates an assignment that includes all spreads containing assigned frames. All frames—not just assigned frames—display their text or graphics content. However, only assigned frames can be checked out. This is the default option.
- **All Spreads** creates an assignment that includes all pages and spreads regardless of whether they contain assigned frames. However, only assigned frames can be checked out. This option lets writers and editors see their work in the context of the entire InDesign layout.

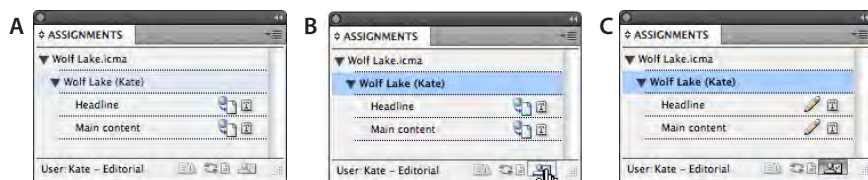


The first spread of Kate's feature article on Wolf Lake. The frame at the top right, and the series of threaded frames (comprising a single story) at the bottom, have been exported to ICML format and associated with Kate's assignment. You can see the names of the two linked ICML files in the Assignments panel in InDesign.

On the second spread reserved for Kate's feature, Peter adds the remaining frames to Kate's assignment by dragging and dropping them onto the Wolf Lake entry in the Assignments panel. He chooses Update Selected Assignment from the Assignments panel menu and alerts Kate, the writer, that the assignment is ready for her to work on.

Write and edit content in InCopy

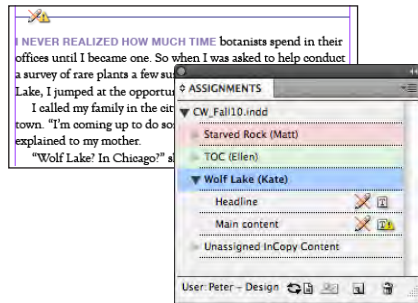
In InCopy, Kate opens the Wolf Lake.icma file from the CW_Fall19 Assignments folder on the server. The assignment file is much smaller than the InDesign layout because it includes only the two spreads containing her story frames, not the entire 124-page layout. Kate selects the name of the assignment in the Assignments panel and clicks the Check Out icon  at the bottom of the panel to prevent others from editing the same stories while she's working on them. She begins writing the main feature story.



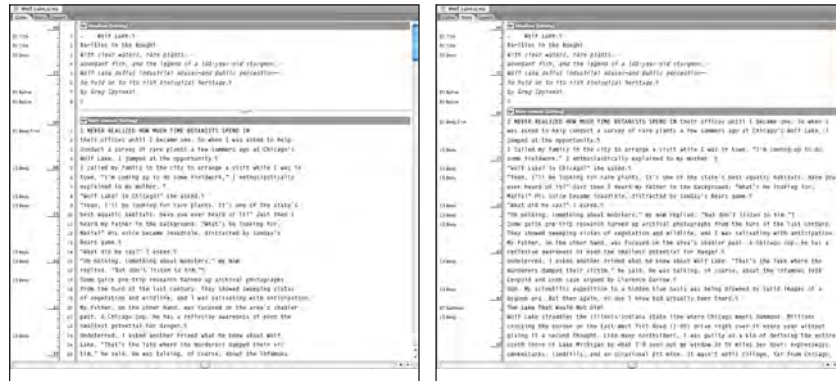
A. The Assignments panel in InCopy lists the editable content in the active file. B. Before she can begin writing, Kate checks out the stories by selecting the name of the assignment and then clicking the Check Out icon at the bottom of the panel. C. The pencil icons confirm the checkout.

Simple access control and synchronization

Straightforward check-in and checkout of linked content frames prevents a co-worker from editing a story you're currently working on and keeps everyone informed as to who is working on which content at any given time. Easy-to-spot visual indicators (such as the Out Of Date symbol) in InCopy and InDesign alert you when a colleague working concurrently on the same document has modified content or page geometry or checked out a content item. Modified items can be brought up to date with a simple click.

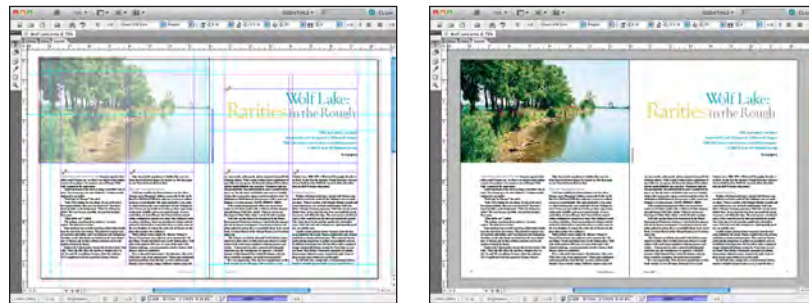


As she works, Kate switches among one of the three page views in InCopy: Layout, Story, and Galley. When she just wants to get the words down on "paper," she uses Story view. When she wants to see line breaks and line numbers, she chooses Galley view.



Story and Galley view, easily accessible by tabs at the top of the window, show the editable text content (including overset text) of the current InDesign layout or assignment in one scrolling window, without distracting text formatting and surrounding page elements. Galley view (left) includes line numbers and stays true to the layout's line breaks. Story view (right) flows text to the edge of the window, as in Word, so less scrolling is required. Gray story bars separate individual stories.

When she wants to see her words in context with the design, Kate works in Layout view. Text formatting, image wraps, footnotes, page jumps, folios, background colors, and other page elements appear exactly as they do in InDesign. Kate can zoom in (up to 4,000%) for close-up work of text set in small type sizes or zoom out for an overall look at multiple spreads at once.

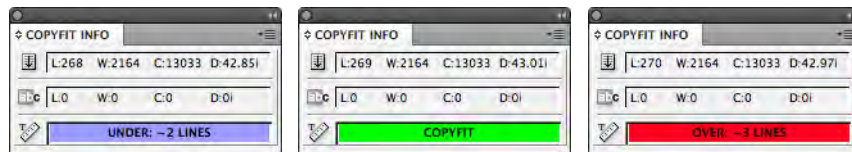


Workflow status icons

Icon	Name	Location
	Available	Assignments panel, text frames, and graphic frames
	In Use by (name)	Assignments panel, text frames, and graphics frames
	Editing	Assignments panel, text frames, and graphics frames
	Available and Out of Date	Text frames and graphic frames
	In Use by (name) and Out of Date	Text frames and graphic frames
	Assignment or Layout Out of Date	Assignments panel
	Text Content Out of Date	Assignments panel
	Text Content Up to Date	Assignments panel
	Graphics Content Out of Date	Assignments panel
	Graphics Content Up to Date	Assignments panel

The InCopy Layout view in normal mode (left) shows nonprinting frame edges, ruler guides, bleeds, the pasteboard, and content status icons. Page elements that are not editable are screened back as a visual cue. Switch to Preview mode (right) to hide the pasteboard and see an accurate print preview of all content in the layout. Content can be edited in either mode.

Regardless of which view Kate's working in, the Copyfit Info panel keeps her up to date with her progress. If her text exceeds the amount of space allotted to the story in the layout, she can access the overset copy in Galley or Story view and edit to fit.



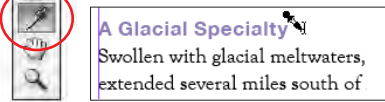
The Copyfit Info panel provides continuously updated statistics on the current story's word, line, and character count and its column depth. A visual and numeric indicator also tracks underset or overset status.

Format text in InCopy

Since InCopy has the same text engine and styling options as InDesign, Kate can be confident that the formatting she applies to text in InCopy will carry through to the InDesign layout. All the paragraph and character styles that the designer created and saved in the InDesign layout are available to InCopy users working on the same layout, helping to ensure that the

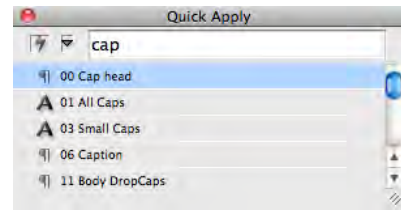
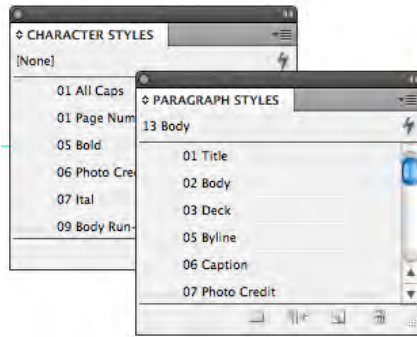
Copy and paste formatting with the Eyedropper Tool

Instead of using menus and panels, some editors may prefer a more visual approach to formatting text. The Eyedropper tool lets users “pick up” text formatting from sample text in Layout view and then apply it to text elsewhere in the document by simply clicking or dragging over it with the “loaded” Eyedropper tool.



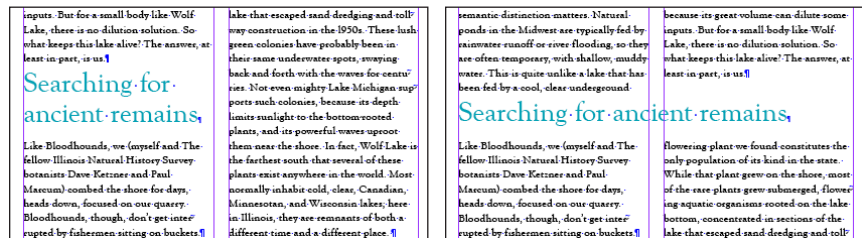
A Glacial Specialty
Swollen with glacial meltwaters, extended several miles south of

formatting applied by individual editors in InCopy remains consistent with the designer’s intent throughout the publication.



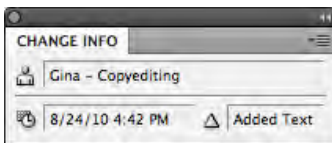
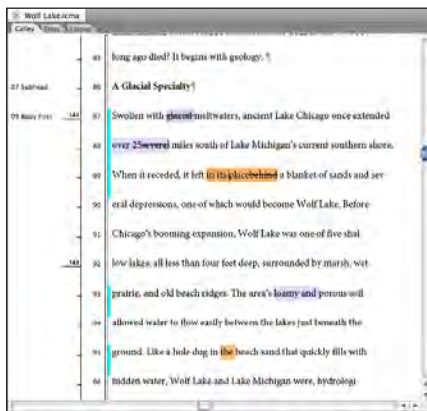
Complicated text formatting is easily applied in InCopy by selecting the desired styles, which were created by the designer, from the panels (left). Editors can also use the Quick Apply feature (above) to locate and apply the styles from the keyboard.

Kate would like a long subhead to extend across both columns in the story. Since she cannot create new text frames, she chooses to manually apply the Span Columns paragraph format (a new feature in InCopy) to the subhead.



Using Track Changes

Turn on Enable Tracking in InCopy or InDesign to record edits made by every user to a story. You can view the tracked-changes markup in Galley or Story view (InCopy) or the Story Editor (InDesign). Use the Changes menu or toolbar to hide, show, navigate, and accept or reject changes. You can also track changes across multiple stories, customize the way tracked changes are displayed onscreen, and (from InCopy) print out the tracked-changes markup.

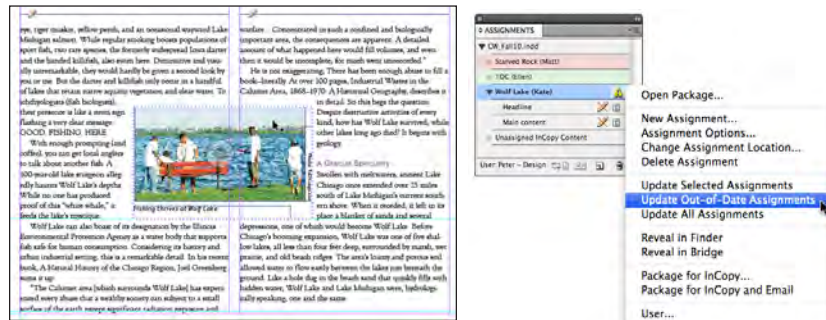


Story or Galley view shows tracked-changes markup (top), and the Change Info panel reveals details of each specific change (bottom).

Editors don’t need additional text frames to change the number of columns a paragraph spans in a multicolumn text frame. As with all the text formatting attributes, the Span Columns setting can be included in a paragraph style and applied to text by applying the style. If editors need to apply some formatting that isn’t available in a style, they can apply it as a manual override.

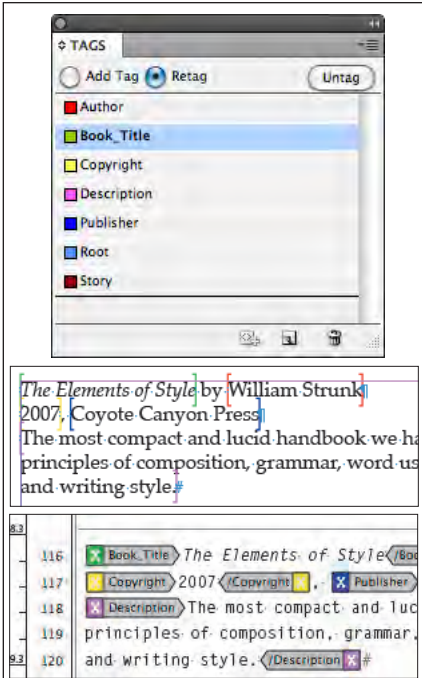
Update design in InCopy

While Kate is working on the Wolf Lake feature story, Peter (the designer) continues to work on the magazine layout in InDesign, creating and designing other pages. He has just learned that there will be one more image in Kate’s feature, so he has to modify other elements to make room. While he cannot edit the contents of the frames Kate has checked out, he still has full control over the page geometry and can add, remove, and resize elements. He places an image on top of the main body of her story and turns on Text Wrap so it pushes Kate’s text to either side of the image instead of overlapping it. Peter chooses Update Out-of-Date Assignments to alert Kate to the change.



InDesign, the crossed-out pencil icons on text frames (and their equivalents in the Assignments panel) tell Peter that someone has checked out the content to work on it. If he hovers his cursor over any workflow icon, a tool tip appears with the name of the user who checked it out and other details. Peter cannot edit the contents of a frame another user has checked out, but he is always able to change its page geometry in InDesign.

InCopy for web, EPUB, and XML workflows In addition to print publications, InCopy can streamline content creation for websites and other distribution methods involving XML. Both InDesign and InCopy allow users to create XML tags and apply them to text selections. Tags are maintained in the text flow during all check-in and checkout procedures as a file is being collaboratively produced. The current XML structure of a file can be previewed and edited in either program's Structure pane. InCopy can open XML files and convert them to standalone InCopy (ICML) files, as well as export a story to XML format.



Click a tag in the Tags panel (top) to apply it to selected text. In Layout view (middle), tagged text is surrounded by nonprinting brackets. Tags are easier to see in Story or Galley view (bottom) and may be hidden for readability.

In InCopy, Kate notices the alert 🚨 in her Assignments panel that the assignment itself is out of date. She chooses Update Design from the panel menu to see Peter's latest changes to the page geometry. Fortunately, the copy she has written for the main story still fits, even with the new image forcing the text to wrap around it. She continues working until she is finished with the main body, saves her changes, and turns her attention to the pull quote on the last page.

Update copy in InDesign

In InDesign, Peter sees an Out Of Date icon 🕒 appear on the Wolf Lake text frames and next to the entry for the story in his Assignments panel, alerting him that Kate saved her edits, and now the content he sees in her feature is out of date. Peter selects the story's entry in his Assignments panel and then clicks the Update Content button 🔄 at the bottom of the panel to review Kate's finished copy. He is glad to see she was able to accommodate the last-minute change.

When Kate has completed all the copy for the feature story, she closes the assignment file. InCopy alerts her that she still has some content checked out and offers to check it in for her. Kate clicks OK to have InCopy save any unsaved changes and check all the content back into the workflow in one step.

Peter now has all of Kate's updated content, and he completes the layout for the Wolf Lake feature story. Next, it's Gina's turn to copyedit and proofread. Using the assignment Options dialog box in InDesign, Peter reassigns the Wolf Lake assignment to Gina and notifies her that it's ready.

Copyedit and proofread in InCopy

In InCopy, Gina opens the Wolf Lake assignment and checks out all its content by clicking the Assignments panel's Check Out icon 📄. She reviews the stories for poor hyphenation, bad line breaks, and widows and orphans, confident that what she sees in InCopy precisely matches the InDesign layout.

Working with tracked changes

Before she makes any edits to the file, Gina chooses Enable Tracking In All Stories from the Changes menu in InCopy. This will allow Kate to review Gina's (and any other user's) changes to the copy before accepting or rejecting them. When Kate checks out the story, she can review Gina's edits and accept or reject them singly or all at once, leaving other user's tracked changes intact.

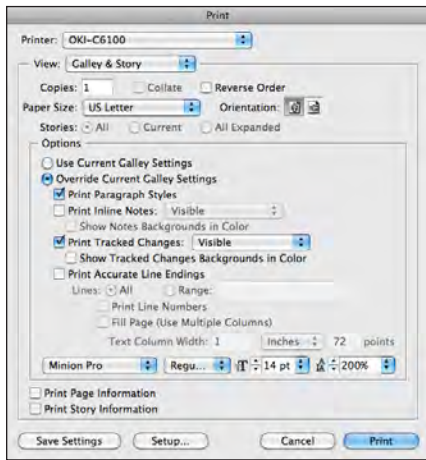
Finish up in InDesign

By this time, all the writers have checked in all the stories from the assignments they had open, Gina has copyedited them all, and Kate has accepted or rejected everyone's changes. In InDesign, Peter updates all content, makes a few last-minute refinements, and then proceeds with his normal preflighting routine in preparation for creating a press-ready PDF file from the InDesign layout.

The results: With the InCopy/InDesign workflow enabling them to work concurrently in tight collaboration, the *Chicago Wilderness* team has shaved considerable time off their magazine production schedule.

Printing and exporting to PDF

Some InCopy users find it difficult to edit onscreen, preferring to review paper proofs and mark them up as in a traditional workflow. This is easy to do in InCopy. In this workflow, it's usually the InCopy users themselves who then apply their handwritten edits to the actual text onscreen. Editors are offered a lot of choices in the Print dialog box. They can print the full layout as single pages or as spreads, with images or without. They can also print out either galleys (with accurate line breaks) or text content as seen in Story view and choose the typeface, font size, and line spacing they prefer, even if it's not what they use onscreen. Story and Galley printouts can optionally include inline notes and tracked changes.



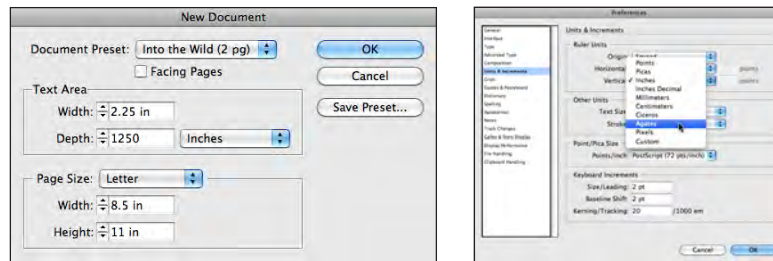
You don't need to use Adobe Acrobat® software to create a PDF file from InCopy; a custom PDF engine is part of the program. To make a PDF file of a layout or an assignment, choose File > Export, and then choose Adobe PDF from the Format menu. PDF export options are nearly identical to Print options (for example, PDF files can be made from the Layout, Story, or Galley view), with a few additional features. One of these is the ability to convert inline notes to annotations ("comments") when exporting the Layout view to PDF.

Chicago Wilderness magazine: Upcoming issue

This example demonstrates how editors can benefit from the InCopy workflow at any point in the process, even before an InDesign layout is ready for them. In this scenario, Robert, the managing editor for *Chicago Wilderness*, wants to begin working on a two-page review of Goose Lake Prairie, a popular regional destination. Goose Lake Prairie is one of the four places slated to be reviewed in an upcoming issue's periodic reviews section, "Into the Wild." By specifying a few basic settings in a standalone InCopy file, Robert can get a head start on his review and be confident that it will fit the InDesign layout that Peter will create in a few weeks.

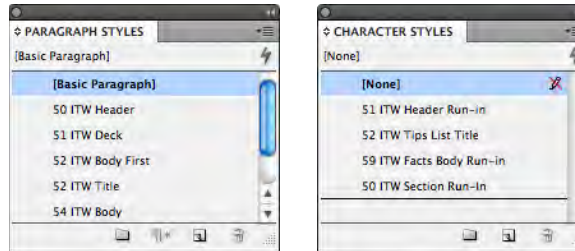
Set copyfitting parameters in InCopy

Robert creates a new InCopy document. In the New Document dialog box, from the Document Preset menu he chooses the Into the Wild preset that Peter helped him prepare earlier. The preset specifies the page size and the main content area's width and target word count. If he preferred, he could enter a target line count, page count, or column depth using any available measuring unit.



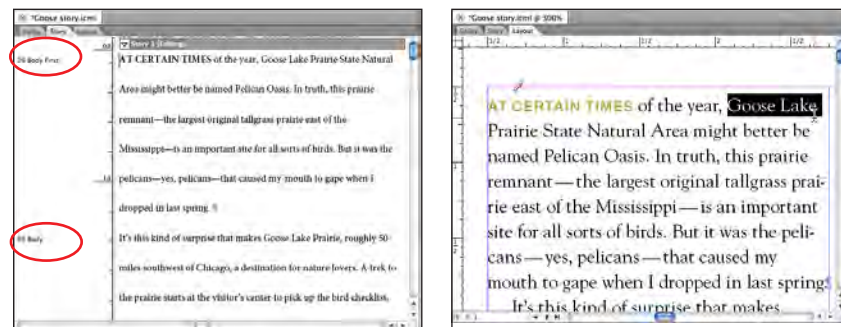
The New Document dialog box in InCopy lets you define a target story length. Writers may prefer to set a target column depth in any unit of measurement, including agates for newspapers.

Because styles affect copyfit, Robert uses commands in InCopy to import selected paragraph, character, and table styles from the InDesign layout of the most recent "Into the Wild" section, helping to ensure his InCopy text formatting will be consistent.



Because InCopy and InDesign share a text composition engine, writers are assured that the formatting and styles they apply to text in InCopy will be honored in the InDesign layout file.

Now Robert is ready to write. He prefers to start in Story view, putting words down quickly as they come to him. Since the InCopy file is not linked to any InDesign layout yet, he understands that the Layout view won't show him his story in the context of other elements on the final designed page, but it is still useful for checking formatting and line breaks.



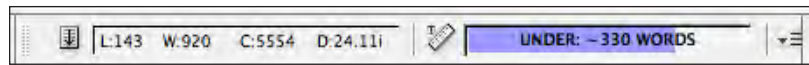
While the Info column in Galley or Story view (left) lists the names of the styles applied to paragraphs, only Layout view (right) shows text in its formatted state.

Advanced word processing tools

Editors working in InCopy enjoy the same powerful toolset for working with long or complex documents as InDesign users do, including:

- **Cross-references**—Insert, track, and modify cross-references that automatically update as content changes or is moved in the document.
- **Footnotes**—Add auto-numbered footnotes or import a Word file with footnotes intact, and then edit them on the page in Layout view or inline, next to their references, in Story and Galley view.
- **Conditional text**—Easily create multiple versions or editions of the same InCopy story by tagging text with version-specific conditions from a convenient panel.
- **GREP Find/Change**—Search and replace text and formatting not just by matching literal text strings, but by finding “wildcard” pattern matches. Save frequently used queries that you can reuse in other InCopy files.
- **Language dictionaries**—Ensure foreign language text is properly spell-checked and hyphenated by choosing the appropriate language dictionary (over 30 choices) from a menu or as part of a text style.

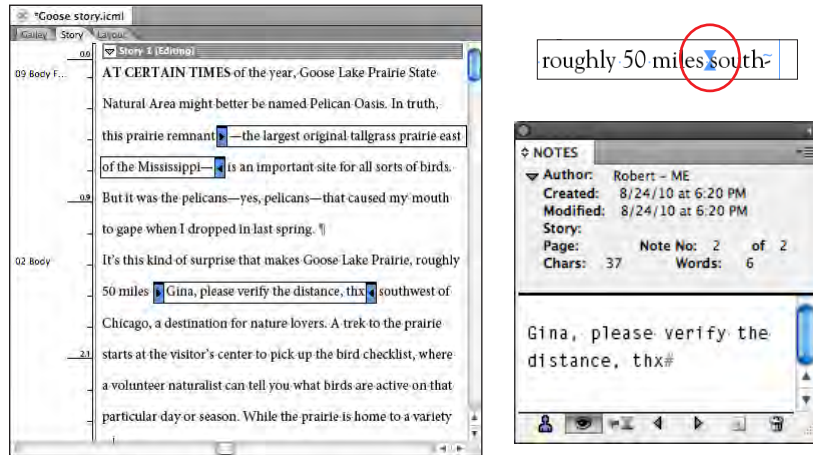
As Robert writes, he keeps his eye on the Copyfit Info toolbar, which provides a word count and other indications of how well his copy will fit its eventual hole in the layout.



Since Robert specified a target word count of 1,250 in the New Document dialog box, the Copyfit Info toolbar informs him that he’s 330 words short at this point (note the current word count of 920 on the left).

Working with notes

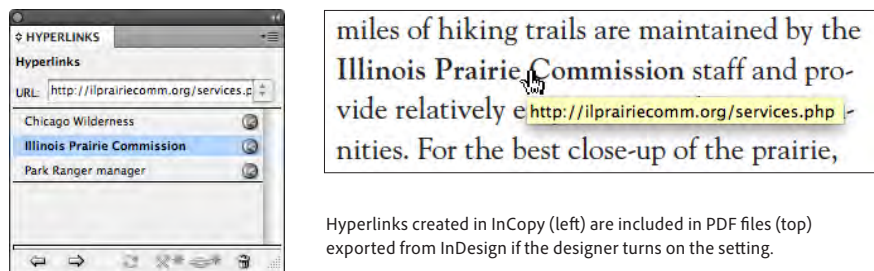
From time to time, Robert wants to keep alternative text close at hand until he decides which version he prefers. He selects the alternative text and presses the F8 key to convert it into an inline note. Occasionally he inserts a new note from the Notes menu and enters comments or questions for Peter or Gina. He can use the Notes panel to show or hide notes and quickly skip from one note to the next.



Inline editorial notes let designers and editors communicate with one another in the context of the copy. In Layout view, notes appear as nonprinting icons (top right) that can be revealed in the Notes panel (bottom right).

Working with hyperlinks

As he’s writing, Robert uses the Hyperlinks panel in InCopy to embed hyperlinks into the website and email addresses he spells out. This way, readers of the PDF version of the magazine will be able to click the hyperlinks and gain immediate access to those resources.



Hyperlinks created in InCopy (left) are included in PDF files (top) exported from InDesign if the designer turns on the setting.

Finally, when he has completed his review of the Goose Lake Prairie nature reserve, he saves the InCopy document into a folder, called "Incoming Copy," that Peter (the designer) created on the server. It holds new stories that are ready to be placed into the InDesign layout.

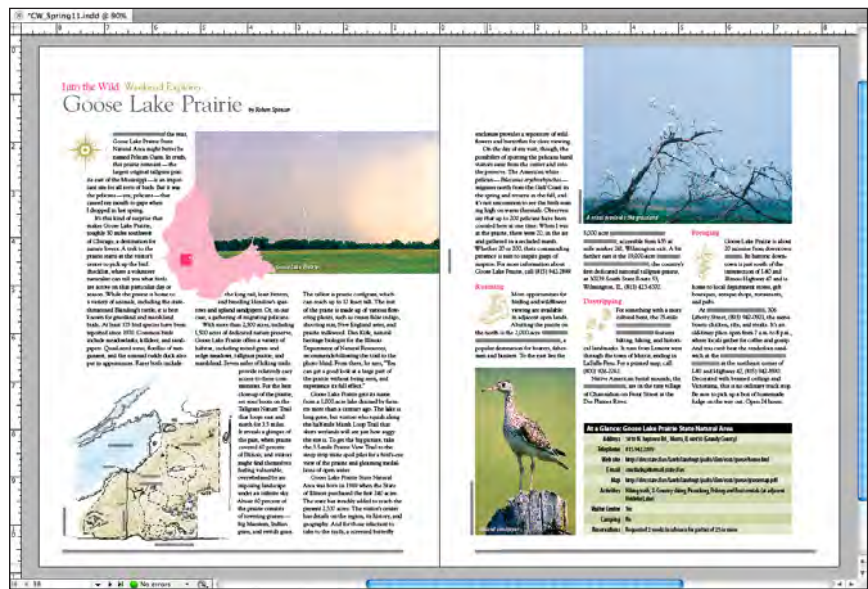
Placing a standalone InCopy file in an InDesign layout

Peter begins working on the layout of the upcoming issue. He adds pages for the "Into the Wild" section and places Robert's ICML file into text frames on the Goose Lake Prairie review spread, which automatically links the frame to the ICML file. Peter continues to flow the story, threading the text from one frame to the next. Robert had already formatted the text with the styles he'd imported and matched the column width, so it fits perfectly. Peter cuts the table from the story flow and pastes it into a new text frame so he can position it elsewhere on the spread. He then adds images and illustrations to the article.

InCopy or "InPhoto"?

Even with the restriction of not being able to reposition or resize image frames, InCopy users have a number of options when editing the contents of those frames, assuming the designer exported them to InCopy format (otherwise, all images are read-only in InCopy).

After checking out an image frame in the layout, InCopy users can scale the image contents to adjust the crop. They can rotate, shear, and flip the image inside the frame, and if it's a layered PSD, PDF, or AI file, they can change which image layers are visible. Editors can modify the image itself if they have the right software installed or even import a different image, replacing the one in the frame, using the File > Place command. Some publishers have found it helpful to install InCopy on their photo editors' workstations. Designers create InCopy assignments composed of placeholder image frames, allowing photo editors to work with images in the layout, just as editors work with text.



Robert's text, flowed into the InDesign layout, fits perfectly. While it's not required that writers apply formatting to InCopy text—they can leave that task to the designer—doing so helps them accurately gauge copyfit and streamlines the production workflow.

Peter knows Robert will need to review the complete article, so he creates an InCopy assignment that includes the main story as well as the title, table, images, and captions. After InDesign saves the assignment and the new linked content files to the project folder on the server, Peter notifies Robert that the layout is ready for him to review.

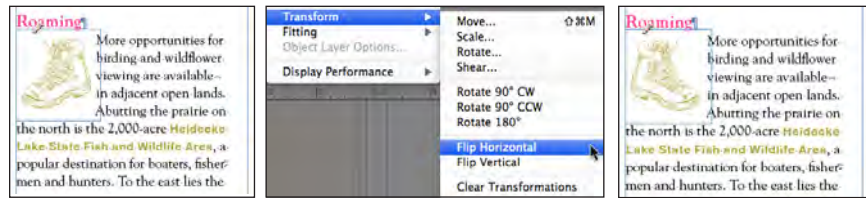
Robert opens the new assignment, checks out the content, and makes minor line-break adjustments to smooth the rag of the text that wraps around the images.

FOR MORE INFORMATION

- **InCopy free trial and documentation**— Download a free trial of InCopy for Mac or Windows from the Adobe website. Free trials are fully enabled for 7 days and come with full documentation built into the program's Help files.
- Even better, if you have a Creative Cloud subscription, you already have InCopy 2021. Just install it from the Creative Cloud app.

Working with images in InCopy

At *Chicago Wilderness*, writers and editors have some control over the images that accompany their stories. Knowing this, Peter made sure to export the inline images he had placed to InCopy format and include them in the assignment so that Robert could make minor adjustments to them. InCopy users cannot modify image frames, just image contents.



After checking out the content, Robert uses the Position tool in InCopy to select the inline graphic and move it around in its frame. He uses the Transform commands for more control or to quickly flip the image's horizontal orientation, as shown here.

When Robert is satisfied with the Goose Lake Prairie spread, he checks the files back in so that Peter can assign them to Gina for copyediting and proofreading.

The results: By using InCopy, writers and editors can work ahead of the publication schedule. Robert's preparatory work in styling and copyfitting his standalone Goose Lake Prairie review enabled the team to skip a number of proofing rounds that would normally be required in a traditional, linear workflow.

Summary

For thousands of small to midsize editorial workgroups, the basic InCopy / InDesign workflow enables tight collaboration, accurate page visualization, and significantly enhanced productivity. It provides many of the efficiencies of high-end editorial systems at a fraction of the cost and without imposing the strict procedures they demand.

Whether you work on the editorial, design, or business side of publishing, and whether you publish books, magazines, newspapers, catalogs, brochures, or nearly anything else, if you're looking for a flexible, streamlined workflow solution for your publishing team, we encourage you to learn more about integrating InCopy with your workflow. Visit www.adobe.com/products/incopy for detailed product information or to download a seven-day trial version of InCopy and InDesign.

Contact us for your InDesign and InCopy training:



Appendix A: InCopy and InDesign workflow features

Parallel collaborative workflow	
Feature	Description
Email-based assignments	Easily assign stories and graphics as a single assignment package to send to any external contributor via email. The package contains all information needed to update the layout with the added or edited content.
Automated file management	Create and edit assignments without worrying about the location of the files in the assignment. Creating an assignment auto-creates a folder that holds the assignment's stories and graphics. Moving an article to a different assignment automatically moves the article's file to the appropriate folder.
Assignments panel	The Assignments panel is the hub of the InDesign and InCopy workflow. View and manage the status of assignments, arrange story order, select multiple items, and unlink stories in one central location. Update assignments to make sure the assignments represent the latest changes not only to text but to the layout as well.
Save story order	Change the sequence of stories in an assignment to match an organization's working style.
Track Changes (ENHANCED)	Track changes to text for improved editorial control and collaboration. View all edits made to a story by an InDesign or InCopy user, and accept or reject any edit as you review the text, individually or by user. Print the tracked-changes markup.
Inline editorial notes	Improve collaboration with inline notes that maintain their position within the text and are visible in both InCopy and InDesign.
Flexible graphics placement	Easily place, scale, crop, and rotate images and artwork, including inline graphics, in frames assigned to editorial staff.
Adobe Mini Bridge (now gone)	Navigate your system and preview page thumbnails of InDesign layout files. Drag and drop files from Adobe Bridge into Layout view easily and efficiently.
Integration with Adobe Bridge	Browse, organize, label, and preview InCopy documents. Search for files using metadata and keywords.
Output to print or Adobe PDF	Print from InCopy to edit hard copy or export one or more stories at a time to Adobe PDF, setting options such as font subsetting or including accurate line endings, inline notes, tracked-changes markup, and styles.
Page visualization	
Layout, Story, and Galley views	Edit copy in the view that best fits the current task. Layout view shows you exactly how stories appear in the InDesign layout and allows you to edit or write in context. Story view displays text in a pure word processing view. Galley view includes line numbers and provides accurate story and line breaks.
Instant layout refresh	Refresh the Layout view whenever your designer sends you design changes for reference as you edit.

Standalone copyfit	Begin assigning or writing copyfitted text as soon as available space is known, even before pages are designed. Define a copyfit area by specifying a column width, column depth, and available styles.
Copyfit status indicator	Color-coded feedback via the Copyfit Info toolbar provides up-to-the-minute feedback on copy length.
Multiple measurement units	Multiple measurement units include agates for newspaper publishing.
Vertical depth ruler	Budget space for stories more accurately with the vertical depth ruler, located in the margin of the Story and Galley views, which reports a story's depth using the active unit of measure.
Power zoom	Use the Hand tool in "patient user mode" to zoom out by simply holding down your mouse button. Continue to hold, and you can move the zoom-area indicator across pages. Release, and the view returns to your original zoom level in the new location. Increase or decrease the zoom percentage using the Up and Down Arrow keys.
Editorial productivity	
Task-based workspaces	Work quickly with established task-based workspaces that unclutter your screen and present only the keyboard shortcuts, menu commands, and panel arrangements that are best for the job at hand. You can also easily customize your own menus and workspaces that can be shared and saved.
Customizable menus	Hide and colorize menu items to streamline workflows and simplify menus for more direct access to the commands you use most. Save these settings as part of a custom workspace.
Text import/export from Buzzword (now gone)	Import and optionally link to the files on Buzzword, the web-based word processor that is part of Acrobat.com. Export to a new Buzzword file to share InCopy stories with online collaborators. Abandoned 2016.
Text import from Word and Excel	Adapt the formatting of diverse Word and Excel documents as you import. Map Word styles to InCopy styles, and import or paste Excel spreadsheets as tables.
Text variables	Simplify and automate the use of repeating elements such as running headers, footers, product names, and date stamps. Modifying a text variable updates all instances of the variable throughout a document.
Conditional text	Take advantage of conditional text to easily deliver multiple versions of a document from a single InCopy file. Build student/teacher textbook editions, multi-language publications, or documents customized for print, web, and mobile viewing by creating conditions, applying them to text, and quickly hiding content without relying on layers.
Cross-references	Simplify the writing and production of long documents with the ability to create cross-references that update as content changes or moves within a document.
Object-level Layers panel (ENHANCED)	Make complex layouts easier to edit in Layout view with the redesigned Layers panel. Temporarily hide and show individual stories and objects with a simple click, even if they're on the same layer.

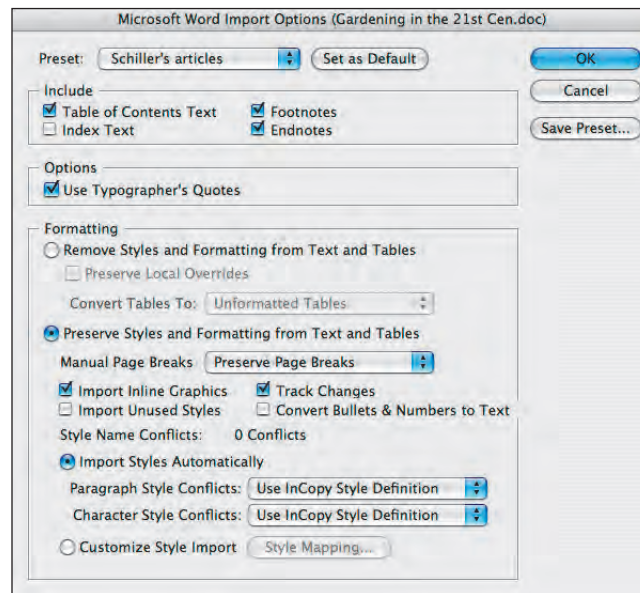
Customizable Links panel	Use the Links panel to find, sort, manage, and organize all placed files in your InCopy documents and assignments. Click on thumbnail images of files to view detailed information such as date created, date modified, and who edited last. Choose which attributes and metadata you would like listed in the panel.
GREP styles	Automatically apply character styles to text that matches a pattern by using a GREP expression specified in the paragraph style.
Nested styles	Use nested styles to dynamically apply complex character formatting to ranges of text within a paragraph, including individual lines of text. Formatting remains unchanged when text is edited.
Support for spread rotation	Easily edit content that appears in a nonhorizontal alignment thanks to support for rotation of spreads in 90-degree increments. Spread rotation established in InDesign is maintained in InCopy.
Support for mixed page sizes	View and edit content in layouts with mixed page sizes. Mixed-page-size documents are set up by the InDesign user and are fully accessible by InCopy users.
Single-page spreads	Create documents that include single-page spreads for greater time savings and more workflow flexibility when composing and editing content.
Edit Original	Choose which application to use to edit a placed item instead of relying on the operating system to default to the appropriate program.
Ruler origin on the spine	Correctly place the ruler's zero position of X at the spine of your document so that the X values are positive for right-sided pages and negative for left-sided pages when Facing Pages is enabled.
Support for anchored objects	Anchored objects travel intelligently with a story as text flow changes. Edit content such as sidebars and callouts that maintain position relative to a line or block of text.
Text macros	Accelerate the entry of boilerplate text and other frequently used words and phrases. Type a short combination of letters, and the shortcut automatically expands to the entire word or phrase.
Powerful Find/Change	Quickly change text, text formatting, and object attributes in documents of any length. Customize the scope of a search to include master pages, footnotes, and locked or hidden layers. Save find/change queries for sharing and instant reuse. Speed up complex searches by running one search using GREP, instead of running multiple conventional searches.
Dynamic spelling	Flag misspellings, repeated words, and capitalization errors with inline markup as you type. Link specific text or styles to one of over 30 language dictionaries for foreign language spell-checking and hyphenation rules.
Built-in thesaurus	Use the Thesaurus panel to quickly look up synonyms, antonyms, and related words. A selected word is automatically loaded when the Thesaurus panel is open to help you find related words and phrases without delay.

Advanced bullets and numbering	Make quick work of lists and numbered sequences, including figure numbers and advanced hierarchical sequences. Include bullet and number formatting in styles for easy global updates. Import bullets or numbering from Word documents. Use advanced hierarchical numbering, and continue the sequence over paragraphs that you don't want to number.
All-language user dictionaries	Add custom words, names, or phrases to a user dictionary; all languages will treat the terms as correctly spelled.
Robust footnotes	Create footnotes or import Word text with footnotes preserved. In Story and Galley view, footnotes appear inline, adjacent to the footnote reference, for easy editing.
Robust table creation and formatting	Quickly create tables from scratch, import styled Word and Excel tables directly, or turn tab-delimited text files into tables. Format tables efficiently and consistently with table styles.
Table editing in Story and Galley views	Edit table content directly within the text flow in both Story and Galley views so you can seamlessly correct overset text without impacting table design.
Change tracking in tables	Speed up document reviews with the ability to track changes in tables. View changes to table content directly within your InCopy document without relying on hard-copy proofs.
Notes in tables	Add inline notes directly to table cells. Notes may contain alternate text, writer-editor communications, and other annotations. Easily add, delete, hide, show, and navigate among notes in tables using the Notes panel.
Easy hyperlink creation	Create compelling interactive documents with hyperlinks that navigate to external URLs, link to files with more information, jump to a section of a page within the same document, and more. Use the Hyperlinks panel to quickly insert hyperlinks directly into text, and verify your hyperlinks directly within InCopy.
Multiple undo/redo	Step through your edits backward or forward in time. Undo/redo steps are unlimited within the current session.
Position markers	Use position markers to quickly jump back and forth between specific positions in your story without tedious scrolling and searching.
Professional typography	Apply a wide range of precise typographic adjustments such as leading, letter spacing, and paragraph spacing. Use OpenType® fonts and Unicode character encoding, and easily insert glyphs by using the Glyphs panel.
Powerful styles	Create and easily update paragraphs, characters, objects, tables, and table cell styles for improved graphic and typographical consistency. Use style groups to simplify and organize long style lists.
Selective style import	Selectively choose which paragraph and character styles to import from other documents, and easily specify how InCopy handles style-name conflicts.
Text import from Word and Excel	Adapt the formatting of diverse Word and Excel documents as you import. Map Word styles to InCopy styles, and import or paste Excel spreadsheets as tables.
Copy and paste formatting	Format text easily and intuitively by picking up attributes from source text and applying the same to target text with the Eyedropper tool. Customize how the tool works with simple checkboxes for each formatting attribute.

Quick Apply	Gain instant access to menu commands, styles, scripts, and text variables without leaving the keyboard for faster text formatting and editing.
Glyphs panel	Create typographically sophisticated documents with the help of the Glyphs panel. Use filters and the Recently Used area to streamline browsing and inserting glyphs from any font. Build and share glyph sets tailored to your workgroup's needs.
Expanded scripting support	Use scripts to automate tedious work. Scripts can be created with JavaScript, AppleScript, or VBScript. Attach scripts to menu commands that run when the command is selected, or launch a script from the Scripts panel. Support for compiled JavaScript protects your investment in building scripts.
Robust XML support	Open, create, and modify structured XML text and tables within your publishing workflow.
ICML	ICML (InCopy Markup Language), an XML-based file format, allows developers to programmatically assemble and disassemble InCopy documents using standard XML tools and without having to open binary InCopy files.
Apple Multi-Touch gesture support	Take advantage of support for Multi-Touch trackpad gestures on Apple MacBook Pro and MacBook Air laptops. Pinch to zoom in on objects and pages, swipe to turn pages, and rotate to change the orientation of objects and spreads.

Appendix B: InCopy and MS Word integration features

Import word processing documents into InCopy— Import plain text, Rich Text Format (RTF), or Microsoft Word files into checked-out frames in the layout. Use controls in the Import Options dialog box to customize the conversion of text formatting, tables, and page breaks. Save settings in a preset for future use.



To facilitate working with outside contributors, InCopy makes it easy to import and convert the formatting in Word documents.

Share InCopy stories with Word users— Export any story in a layout or assignment to RTF, which is compatible with Word, to share with outside authors who aren't part of the workflow. Place incoming RTF files into checked-out layout stories.

Open text files directly in InCopy— Open Microsoft Word (DOC and DOCX) files, ASCII (TXT) files, and RTF files using the File > Open command in InCopy. When a file is opened, a conversion dialog box appears with options dependent on the file type. After you choose options and click OK, files are converted to standalone InCopy (ICML) files.

Import selected text from Word— Drag and drop or copy and paste text selections from a Microsoft Word document directly into an InCopy story. Choose whether or not InCopy should retain the original formatting (via the Preferences dialog box in InCopy).



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