Collaborative Editorial Workflow
The Adobe InCopy CS4 and InDesign CS4 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® CS4 is a professional writing and editing program that integrates tightly with Adobe InDesign® CS4 to deliver a complete solution for collaborative editorial workflow for any size publishing workgroup.

InCopy CS4 lets writers and editors simultaneously develop their individual stories directly in the InDesign CS4 layout, even while the designers are working on the same layout in InDesign. Because InCopy CS4 and InDesign CS4 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 paper explains how using InCopy CS4 and InDesign CS4 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 CS4 workflow that's easily customized for your workgroup's needs.

Adobe®

Collaborative editorial workflow:
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 well suited for 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 repeat itself multiple times, resulting in additional material costs, and perhaps more importantly, a significant decrease in efficiency and job satisfaction.

Conventional linear workflow

| Copy to edit | Copy to proof | Final copy | 1st layout proof | 2nd layout proof | *nth* layout proof | Final layout for printer |

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 re-formatting content when stories are updated; and editors may hover next to designers making over-the-shoulder copy corrections.
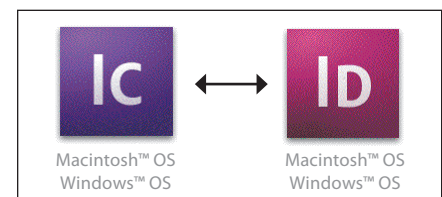
The InDesign CS4 and InCopy CS4 workflow: concurrent and collaborative

Implementing an InDesign CS4 and InCopy CS4 workflow transforms this process by making it easy to work with copy and design together.

Using InDesign CS4, the designer makes layout content editable to 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 to wend its way to them.

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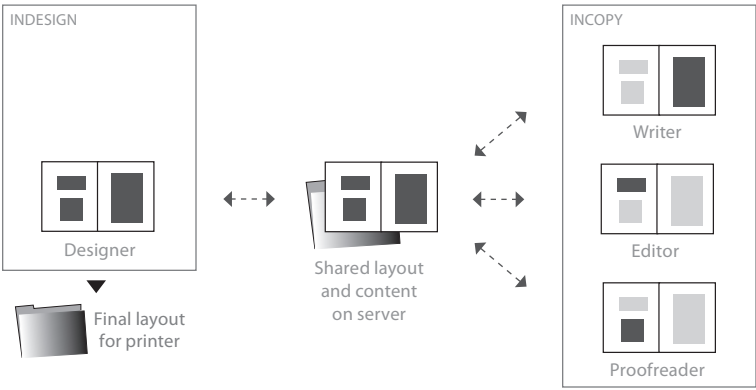
Since InCopy users are working in the live layout file, they can "write to fit" (or edit to fit) from the start, dramatically reducing the number of proofing rounds required.

Ic ⟷ **ID**

Macintosh™ OS
Windows™ OS

Macintosh™ OS
Windows™ OS

A Cross-Platform Solution
Windows InCopy CS4 flawlessly opens InDesign CS4 files created on a Macintosh, and vice versa.

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.

A Powerful Tool for Editors

InCopy CS4 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 Adobe InCopy, without fear of overwriting each others' 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 copyfit 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; and support for rapid editing and formatting using only the keyboard.

However, to protect the integrity of the design, InCopy only allows editors to edit the *contents* of text and image frames which 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, etc.). While they can apply local text formatting and any text styles the designers created and saved 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 the final touches to their 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 CS4 and InDesign CS4	Third-party developer solutions that add structure and features to the InCopy and InDesign workflow	Enterprise-level publication production & management systems from systems integrators with InCopy and InDesign at their 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	http://partners.adobe.com/public/asn/partnerfinder/developer/index.html	www.adobe.com/products/incopy/integrated.html

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 CS4 paired with InDesign CS4 provides a simple, flexible solution that enables team members to work in parallel without interfering with each other's work. The basic InCopy CS4 and InDesign CS4 workflow is ideal for project teams of 2 to 15 people, such as small to mid-size book publishers, weekly newspapers, corporate communications teams, and monthly magazine publishers. Consult the table for guidance on selecting the right way to integrate InCopy based on the size and complexity of your organization.

Moving to an InCopy CS4 workflow

Making the transition to an InCopy workflow is surprisingly easy and flexible. InDesign CS4 contains all the tools necessary for design and production staff to participate in the workflow, so all that's needed is to install InCopy CS4 on the editorial workstations. InCopy can be flexibly integrated into 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 e-mail–based Assignments. These options, detailed below, allow publishers to customize the 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 work-flow is to place the InDesign layout file (.indd) on a local network file server and have all publication staff work with it directly off the server. (This works best with small layout files.) Designers open the file over the network in InDesign. Editors and writers open the 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.

A typical 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 format (.icml) files, saving these on the server in a project subfolder. The layout's content 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/check-out system prevents more than one user from editing the same content in the layout at the same time.

Layout-based workflow
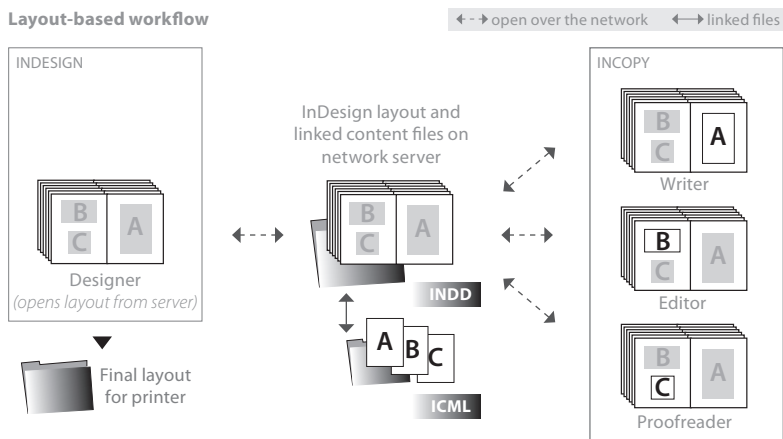
Assignment-based Workflow. Assignment (.icma) files are subsets of full InDesign layout (.indd) files; often containing only one or two spreads from a much larger InDesign document, and so are faster to open over the network. Even if network speed is not an issue, assignments allow the designer to provide each editor with a single document containing only the content for which they are responsible.
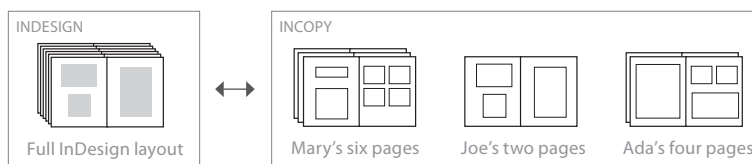
Multiple InCopy assignment (.icma) files can be created and managed from a single InDesign layout file.

Here the designer has exported three assignments, one for each of the editors working on the publication.
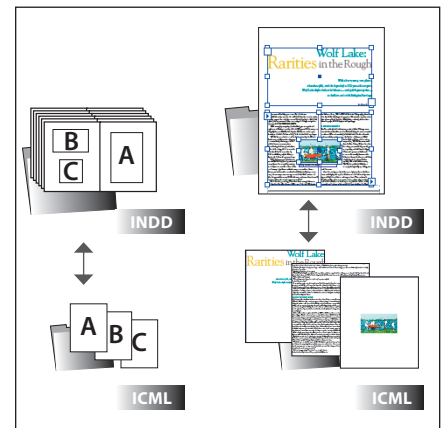

Understanding linked content (.icml) files
Most content in an InDesign layout file is contained in a text or image frame. Designers create these frames, position them on the page, and fill them with text or graphics using InDesign tools. Some frames may be empty "placeholders," awaiting content.

In the InCopy CS4 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 layout (.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, are visible in the InCopy layout view, but are not editable.

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 assignment (.icma) files in the Assignments subfolder, and from the frames selected by the designer, it exports linked InCopy content (.icml) files to the Content subfolder. Each editor opens their own assignment file in InCopy to edit their content. The same check-in/check-out system prevents the designer from modifying a frame's content while an editor is working on it, and vice versa.

Assignment-based workflow
← - → open over the network   ←→ linked files
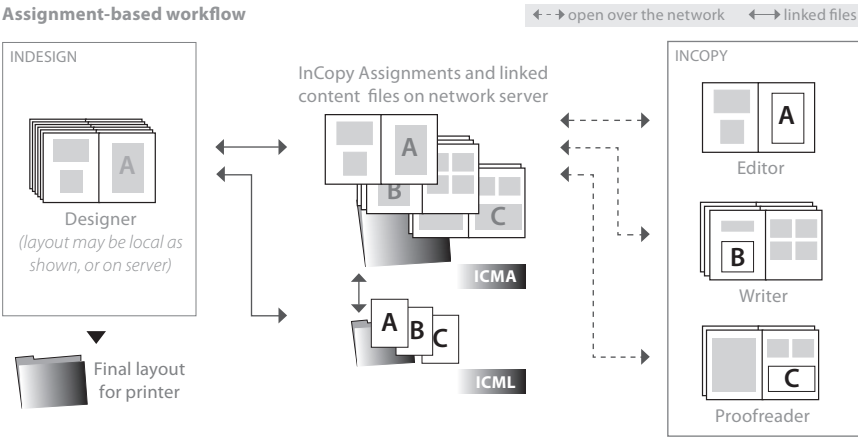
Remote Workflow. If an editor is off-site and cannot access the file server, or if a publishing team doesn't have access to a central file server, InCopy can be used remotely. This solution requires the use of Assignments (see above) for any editor who is working remotely, even if the workgroup is using 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 e-mailed 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 the content 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)
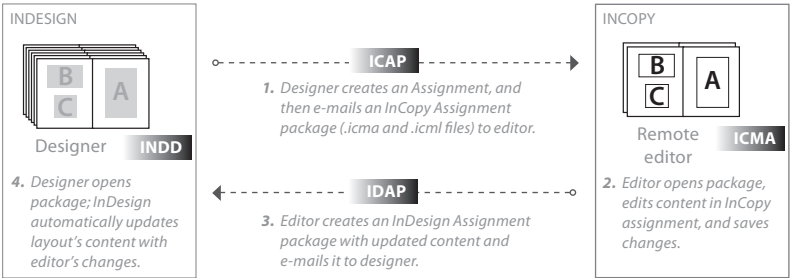
When the remote editor opens the packaged assignment on his own computer, the file automatically unpacks itself, opening the Assignment file in InCopy and allowing the editor to edit its content. When the editor is finished, he can use the same procedure for packaging the assignment and modified stories into a single file and sending it off, either to another editor as an InCopy Package (.icap) or back to the designer as an InDesign Package (.idap). When the designer receives and opens an InDesign Package file, it automatically unpacks itself, checks the content back in, and allows the designer to update the layout with the editor's changes.

About file types

The InCopy CS4 workflow entails working with three main types of files and three others that are used in special situations. Each type has its own file name extension to distinguish among them in the operating system, in the InCopy CS4 Story bar, and in InCopy CS4 and InDesign CS4 status messages.

|	
INDD	The InDesign layout, containing a mix of native, embedded, and linked page elements in frames.
ICML	A file containing the contents of a text or graphics frame exported from the InDesign layout to InCopy format, known as a "linked content file" because it's linked to the layout.
ICMA	An InCopy assignment file, containing page element 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 the assignment file.
ICMT	An InCopy template for a standalone .icml file.
ICAP	An InCopy Package file used in remote workflows, containing an assignment (.icma) file and its associated linked content (.icml) files.
IDAP	An InDesign Package file used in remote workflows, it contains an assignment (.icma) file and its associated managed content (.icml) files.

# Step-by-Step InCopy CS4 workflow examples

Chicago Wilderness magazine: Current issue

Chicago Wilderness is a 124-page full-color quarterly magazine. It offers its outdoor enthu-siast 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 2010 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 the 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

1. In InDesign, on the four pages in the layout allotted for the Wolf Lake feature 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 right). InDesign automatically saves this file in the project's assignments folder, CW_Fall10 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 Contents folder within the CW_Fall10 Assignments folder.
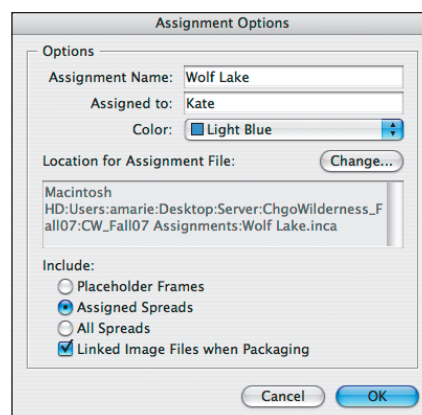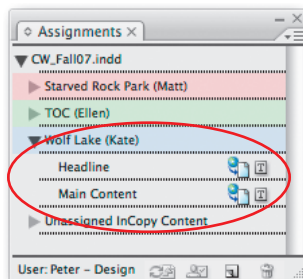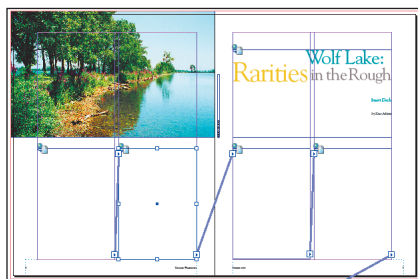

The first spread of Kate's feature article on Wolf Lake. The frame at the top right, and the series of threaded frames (comprising a single story) at the bottom, have been exported to ~~.inx~~ ICML format and associated with Kate's assignment. You can see the names of the two linked ~~.incx~~ ICML files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

2. 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

3. In InCopy, Kate opens the Wolf Lake.icma file from the CW_Fall10 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, and not the entire 124-page layout. Kate selects the name of the assignment in her 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.
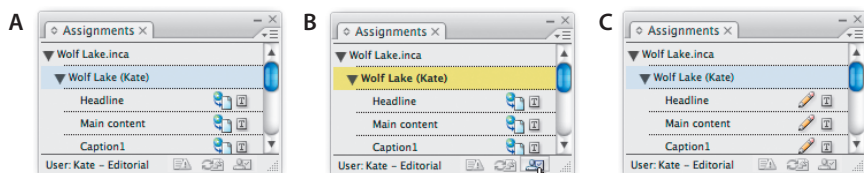

A. The Assignments panel in InCopy lists the editable content in the active file. B. Before she can begin writing, Kate checks out the stories by selecting the name of the assignment and then clicking the Check Out icon at the bottom of the panel. C. The pencil icons confirm the checkout.

About assignment options

An assignment includes an assignment name, the InCopy user who will work on the assignment, and a color for identifying assigned frames in InCopy and InDesign. Additional controls deter-mine 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 exclu-sively 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 as-signed frames can be checked out. This option lets writers and editors see their work in the context of the entire InDesign layout.

4. As she works, Kate switches among one of the three page views in InCopy CS4: 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.
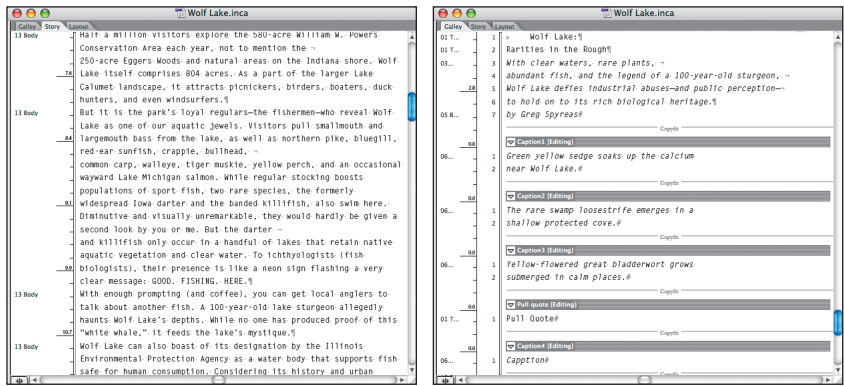

Story and Galley view, easily accessible by tabs at the top of the window, show the editable text content (including overset text) of the current InDesign layout or assignment in one scrolling window, without distracting text formatting and surrounding page elements. Story view (left) flows text to the edge of the window, as in Word. Galley view (right) includes line numbers and stays true to the layout's line breaks (note the short caption lines). 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 are exactly as they appear in InDesign. Kate can zoom in (up to 4,000 percent) for close-up work of text set in small type sizes, or zoom out for an overall look at multiple spreads at once.
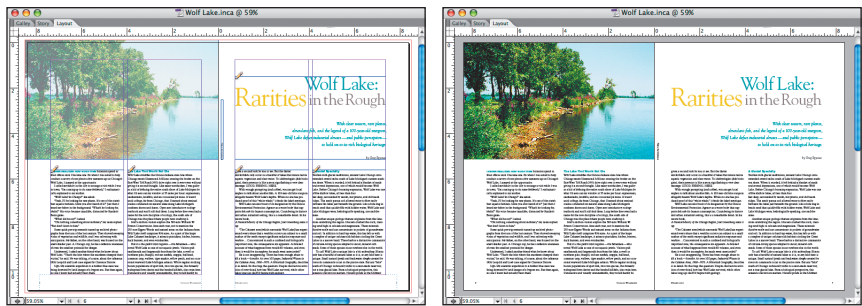
The InCopy CS4 Layout view in normal mode (left) shows nonprinting frame edges, ruler guides, bleeds, the pasteboard, and content status icons. Page elements that are not editable are screened back. Switch to Preview mode (right) to see an accurate print preview of all content in the layout. Content 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.
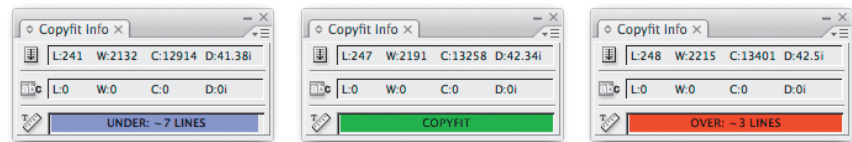

The Copyfit Info panel provides continuously updated statistics on the current story's word, line, and character count and its column depth. A visual and numeric indicator also tracks underset or overset status.

Update design in InCopy

5. 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

**Simple access control and synchronization**
Straightforward check-in and check-out 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 has checked out a content item. Modified items can be brought up to date with a simple click.
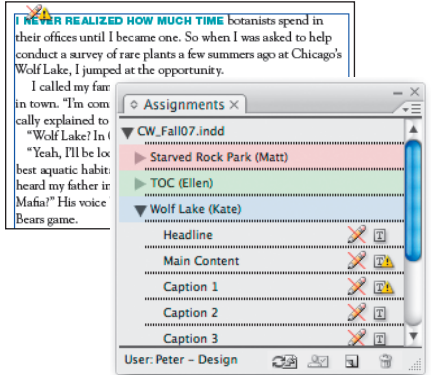
Workflow status icons

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

Text Wrap so it pushes Kate's text to either side of the image instead of overlapping it. Peter chooses Update Selected Assignments to alert Kate to the change.
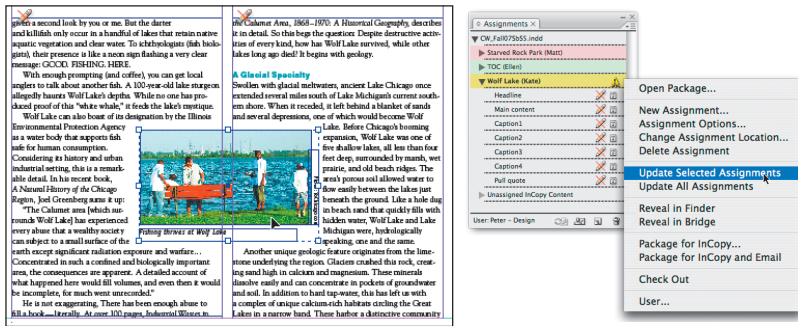
In InDesign, the crossed-out pencil icons on text frames (and their equivalents in the Assignments panel) tell Peter that someone has checked out the content to work on it. When he hovers his cursor over an icon, a tool tip appears with the name of the user who checked it out and other details. Peter cannot edit the contents of a frame another user has checked out, but he is always able to change its page geometry in InDesign.

6. 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

7. 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.

8. When Kate has completed all the copy for the feature story, she closes the Assignment file. InCopy alerts her that she still has some of the 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. 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

9. In InCopy, Gina opens the Wolf Lake assignment and checks out all of 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

10. Before she makes any edits to the file, Gina chooses Enable Tracking In All Stories from the Changes menu in InCopy. This allows Kate to review Gina's suggested corrections to the copy before accepting or rejecting them, which she can do one-by-one or all at once.

Finish up in InDesign

11. By this time, all the writers have checked in all the stories from the assignments they had open, and Gina has reviewed them all. 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.

Using Track Changes

Turn on Enable Tracking in InCopy to record edits made by every user to a story, including designers. View the change markup in Galley view or Story view and then 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 print out the tracked changes markup.
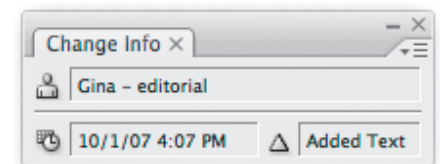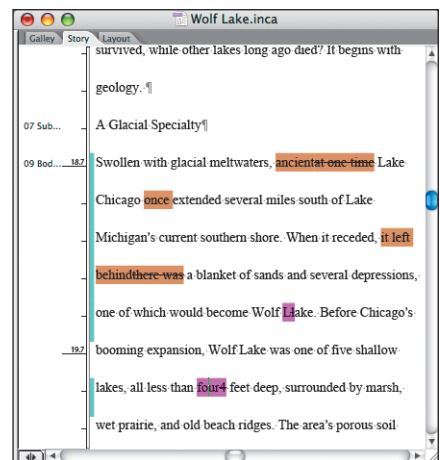

Story view shows tracked changed mark-up (top), and the Change Info panel reveals details of each specific change (bottom).

Chicago Wilderness **magazine: Upcoming issue**

The next 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, another writer on the *Chicago Wilderness* editorial team, 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 short weeks.

Set copyfitting parameters in InCopy

1. Robert creates a new InCopy document. In the New Document dialog box, he clicks the Document Preset menu and 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.
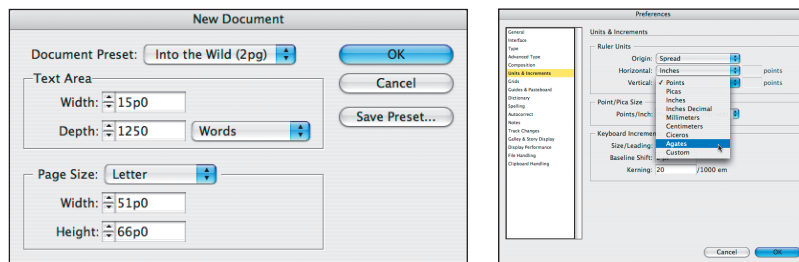

The New Document dialog box in InCopy lets you define a target story length. Newspaper writers may prefer to set a target column depth in any unit of measurement, including agates.

Because styles affect copyfit, Robert uses commands in InCopy to load selected paragraph, character, and table styles from the InDesign layout of the most recent Into the Wild section, ensuring his InCopy text formatting will be the same.
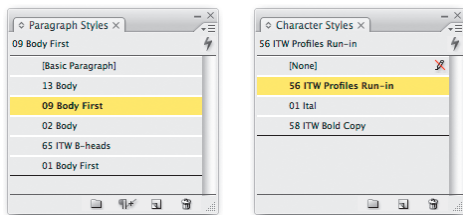
Because InCopy and InDesign share a text composition engine, writers are assured that the formatting and styles they apply to text in InCopy will be honored in the InDesign layout file.

2. 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 context of other elements on the final designed page. Nevertheless, as he's further along, Robert occasionally switches to Layout view to ensure that he's applied the correct paragraph and character styles and to see how the text will appear in its final column width.
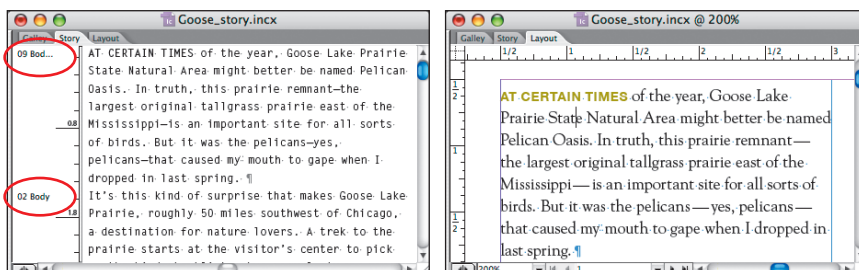

While the Info column in Galley or Story view (left) lists the names of the styles applied to paragraphs, only Layout view (right) shows text in its formatted state.

InCopy CS4 for Web and XML Workflows

In addition to print publications, InCopy CS4 can streamline content creation for websites and other distribution methods involving XML.

Both InDesign CS4 and InCopy CS4 allow users to create XML tags and apply them to text selections. Tags are maintained in the text flow during all check-in and check-out 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 CS4 can open XML files and convert them to standalone InCopy (.icml) files, as well as export a story to XML format.
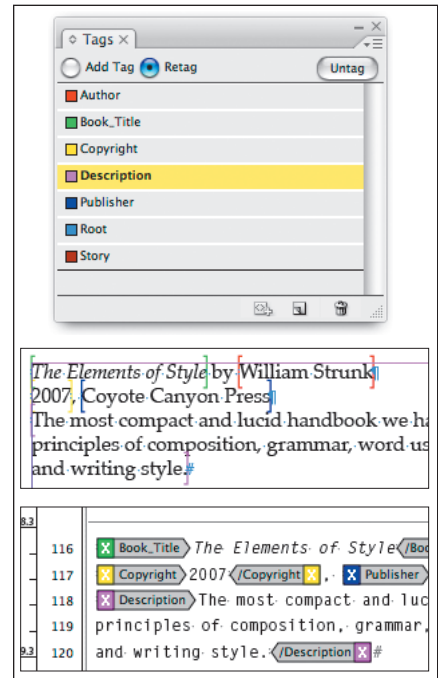
Click a tag in the Tags panel (top) to apply it to selected text. In Layout view (middle), tagged text is surrounded by nonprinting brackets. Tags are easier to see in Story or Galley view (bottom) and may be hidden by the user for readability.

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.
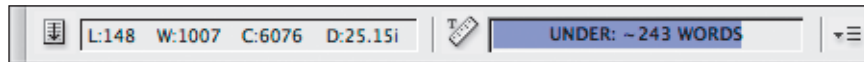
Since Robert specified a target word count of 1,250 in the New Document dialog box, the Copyfit Info toolbar informs him that he's 243 words short at this point (note the current word count of 1,007 on the left).

Working with notes

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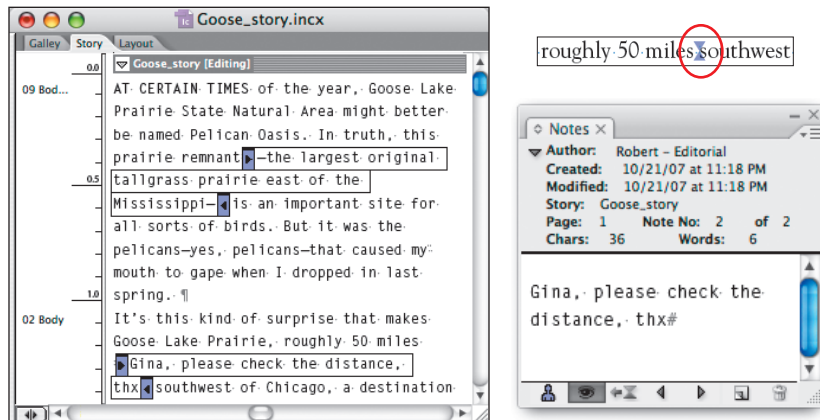
Inline editorial notes let designers and editors communicate with each other in the context of the copy. In Layout view, notes appear as nonprinting icons (top right) which can be revealed in the Notes panel (bottom right).

Working with tables

4. In the Into the Wild section, every review of an area destination includes a small table listing the area's contact information, activities, website address, and other information. Robert copies the information from an e-mail and pastes it into the text flow, and then uses the InCopy table features to convert the tabbed text into a table and format it.
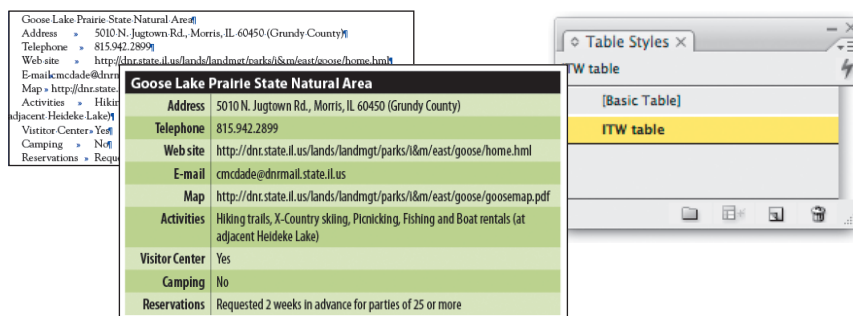
Powerful table functions allow users to easily convert raw tabbed text (top left) or tables placed from Word or Excel into elegantly formatted tables (center). Settings for stroke color, alternating background fills, and text styles can be specified in a table style and applied with a single click.

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 standalone stories that are ready to be placed into the InDesign layout.

Placing a standalone InCopy file in an InDesign layout

5. 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

Printing and Exporting to PDF

Some InCopy users find it difficult to edit on-screen, preferring to review paper proofs and mark them up as in a traditional workflow. This is easy to do in InCopy CS4. Of course, 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.
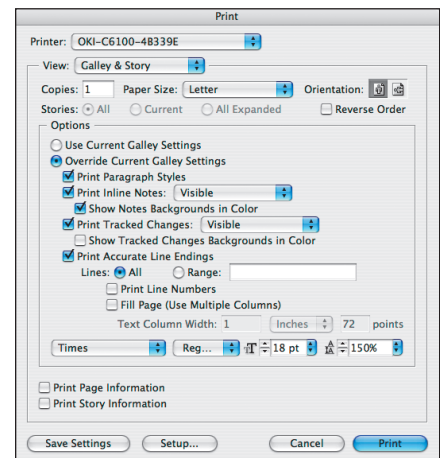
Adobe Acrobat is not required to create a PDF from InCopy; a custom PDF engine is part of the program. To make a PDF of a layout or an assignment, editors use the File > Export command and choose Adobe PDF from the Format menu. PDF export options are nearly identical to Print options (e.g., PDFs can 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, something not even InDesign CS4 can do.

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, and then adds images and illustrations to the article.
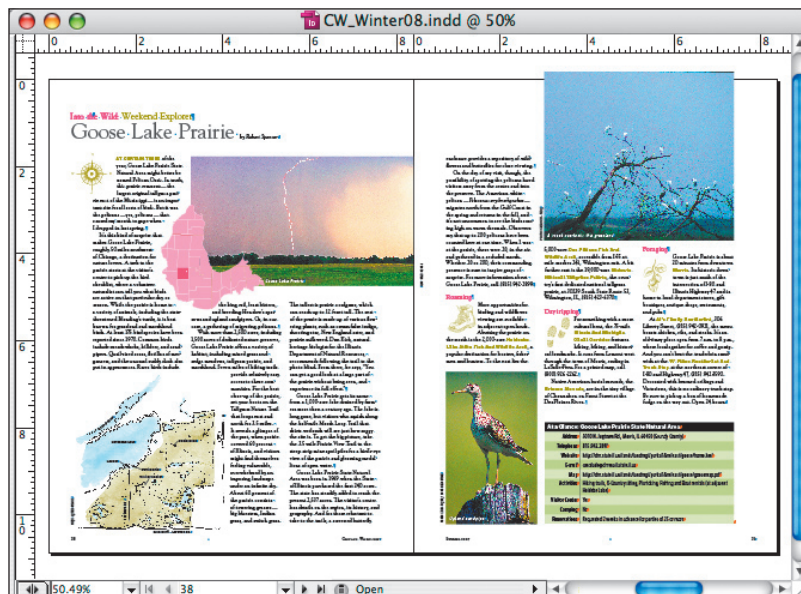

Robert's text, flowed into the InDesign layout, fits perfectly. While it's not required that writers apply formatting to InCopy text—they can leave that task to the designer—doing so helps them to achieve the essential task of accurately gauging copyfit, and also helps streamline the production workflow.

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.

6. 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.

Working with images in InCopy

7. 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 as he sees fit. InCopy users cannot modify image frames, just the image contents.
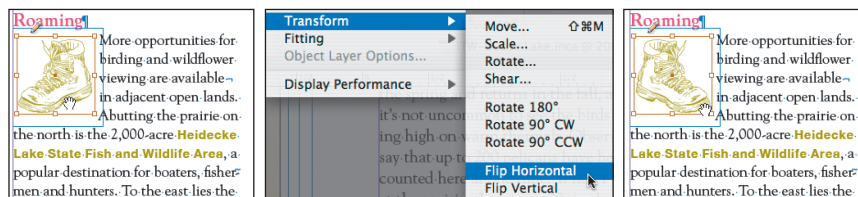
After checking out the Boot image, Robert uses the Position tool in InCopy to select it and move it around in its frame. He uses the Transform commands for more control, or to quickly flip the image's horizontal orientation, as shown here.

8. 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 CS4, writers and editors can work ahead of the publication schedule as their schedule permits. 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.

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, change which image layers are visible. Editors can modify the image itself if they have the right software installed, or can 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 CS4 on their photo editors' workstations. Designers create InCopy assignments for them comprised of placeholder image frames, allowing the photo editors to work with images in the layout, just as editors work with text in the layout.

## Quick Reference: InCopy CS4 and InDesign CS4 Workflow Features

Parallel Collaborative Workflow	
E-mail–based Assignments	Easily assign stories and graphics as a single assignment package to send to any external contributor via e-mail. 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.
Save Story Order	Change the sequence of stories in an assignment to match an organization's working style.
Track Changes	Track changes to text for improved editorial control. View all edits made to a story, and accept or reject any edit as you review the text.
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.
Output to Print or Adobe PDF	Print from InCopy CS4 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, 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 using the vertical depth ruler found in the margin of the Story and Galley views, which reports a story's depth using the active unit of measure.

Editorial Productivity	
Customizable Workspaces	Access only the tools you need for a specific task or monitor configuration. Save panel layouts, keyboard shortcuts, and menu configurations as unique workspaces to fit the way you work.
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 from Word and Excel	Adapt 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.
Anchored Objects	Anchored objects travel intelligently with a story as text flow changes. Quickly create content such as sidebars and callouts that maintain position relative to a line or block of text.
Text Macros	Accelerate 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 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 thirty 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.
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.
Robust Footnotes	Create footnotes or import Word text with footnotes preserved. Footnotes appear inline, adjacent to the footnote reference, for easy editing.
Robust Tables 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 quickly and consistently with table styles.
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 move 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 apply 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 CS4 handles style-name conflicts.
Expanded Quick Apply	Gain instant access to menu commands, styles, scripts, and text variables without leaving the keyboard for faster text formatting and editing.

Editorial Productivity, continued	
Glyphs Panel Enhancements	Create typographically sophisticated documents with the enhanced Glyphs panel. New filters and the new Recently Used area 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, Apple Script, 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, modify, and contribute structured XML text and tables to your publishing workflow.

Appendix: InCopy CS4 and Microsoft 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.
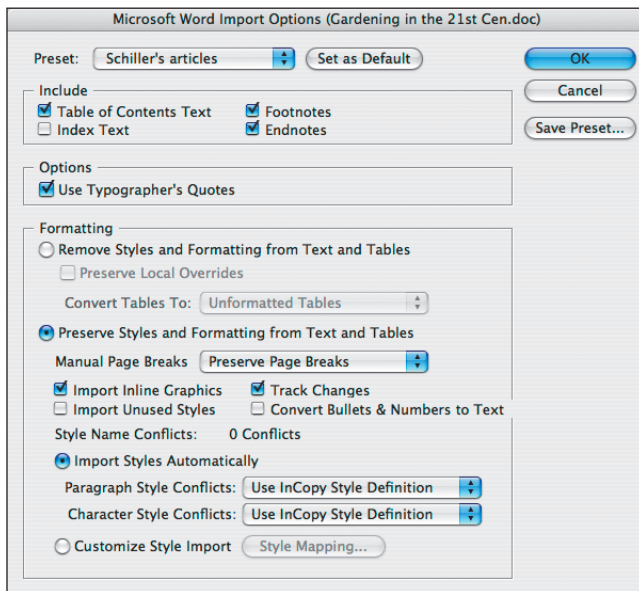
To facilitate working with outside contributors, InCopy CS4 makes it easy to import and convert the formatting in Word documents.

- **Share InCopy stories with Word users.** Export any story in a layout or assignment to RTF 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 Word (DOC) files, ASCII (TXT) files, and Rich Text Format (RTF) files using the File > Open command. A conversion dialog box appears with options dependent on the file type being opened. After choosing options and clicking 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 Word document directly into an InCopy story. Choose whether or not InCopy should retain the original formatting in the InCopy Preferences dialog box.

Summary

For thousands of small to midsize editorial workgroups, the basic InCopy CS4/InDesign CS4 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 into your workflow. Visit the Adobe web site at *www.adobe.com/products/incopy/* for detailed product information or to download a 30-day trial version of InCopy CS4 or InDesign CS4.

FOR MORE INFORMATION

- *InCopy CS4 free trial and documentation*
  Download a free trial of InCopy CS4 for Macintosh or Windows© from the Adobe website. Free trials are fully enabled for thirty days and come with full documentation built into the program's Help files.

- *InCopy CS4 + InDesign CS4 Integration*
  This comprehensive video tutorial series (over eight hours total) authored by independent InCopy trainer and consultant Anne-Marie Concepción can be purchased on DVD or viewed online at *http://lynda.com*.

- *InCopyFlow*
  Free monthly e-zine of InCopy workflow tips, techniques, news, and reviews for editors and designers who collaborate in the workflow. Sign up at *http://senecadesign.com/designgeek/incopy.html*.

- *InCopy User Forum*
  Visit the InCopy user forum to get answers to technical questions or exchange ideas with other users. *http://www.adobe.com/support/forums/*.

- *InDesign User Group*
  Learn more about InCopy, get the latest InCopy and InDesign news, and connect with other InCopy users. *http://www.indesignusergroup.com/*.