

InCopy CS4 Quick Start

Getting started with an InCopy CS4 workflow

1. Super-simple approach

InDesign CS4 preps the .indd file for InCopy to use

In the first-time use, the InDesign user clicks on File > User, giving a name and color choice. The InDesign CS4 user opens the InDesign file and exports some or all text content outside the document into a folder on a network drive volume. Now one or many text files are externally linked as .icml textfiles. Optional: In Preferences > File Handling, the InDesign user sets the preference to allow for textfiles to show up in the Links Panel.

What the InCopy writer/editor does next

For the first use of InCopy, the InCopy writer/editor clicks File > User to setup a user name and color choice. The InCopy CS4 writer/editor next clicks on File > Open and browses to the InDesign document and opens it. In actuality, the InCopy user is not opening the .indd file; but rather is opening a copy of the layout. It gives the illusion as if the file was opened in InDesign. The InCopy user can only edit the exported text stories and cannot edit the physical layout nor the styles.

The InCopy writer/editor clicks the Type tool into a story. The InCopy user must Check Out the story for editing. File > Check Out or Cmd+F9 or click the check-out button within the Assignments panel are three ways to accomplish a check-out. This means that no one else can edit that checked-out story while he or she is working on it. InCopy is now editing content; also called the .icml textfile.

The InCopy user can look at the story in any of 3 different views: Galley, Story, or Layout view, where writing to fit can be done visually. When done editing, he or she Saves Content (Cmd+S), and then Checks-In the story (Shift+ Cmd+F9 or click the Assignments panel check-in button), and might work on a new story or close the document. InCopy replaces Microsoft Word in your workflow.

What the InDesign graphic designer does afterward

When the story is saved and checked back in by the InCopy writer/editor, the status of the .icml file will show as Out of Date from within the Assignments panel. The InDesign user sees the Assignments panel yellow warning triangle. He or she clicks Update and the text is relinked into the layout, giving the InDesign document the same text that the InCopy user just edited.

2. Still pretty simple approach: use assignments

InDesign CS4 preps the .indd file for InCopy to use

The InDesign user should put the InDesign document within a folder on the network drive, and go on to make an Assignments subfolder as well as a Content subfolder. The InDesign CS4 user opens the InDesign file and exports some or all text content outside the document into the Content folder on the network drive. Now, the text is externally linked as .icml textfiles. The InDesign user next makes a new Assignment within the Assignments panel, choosing the Assignments folder on the network drive. He or she drags the story content onto one of the assignments, thus associating the content with the assignment. A yellow warning triangle requires an Updating of the Assignment. Assignment files are .icma files; they define the geometry of the page and present the .icml textfiles within the view of the columns in the pages. The InDesign user updates the design and must save the InDesign document. Optional: In Preferences > File Handling, the InDesign user sets the preference to allow for textfiles to show up in the Links Panel.

What the InCopy writer/editor does next

The InCopy writer/editor clicks File > User to setup a user name and color key. The InCopy CS4 writer/editor clicks on File > Open and browses to the InDesign document's Assignment sub-folder in search of .icma files. These .icma files imitate the page geometry of the InDesign document, and also give access to the .icml textfiles within them for editing.

The InCopy writer/editor sees a .icml story he or she would like to edit. After clicking the Type tool into the Story, the InCopy user must Check Out the story for editing. This means that no one else can work on that checked-out story while he or she is working on it. InCopy is now editing the .icml textfile. Whenever the InCopy writer/editor sees a yellow warning triangle in the Assignments panel; the user will Update the design or content. This can be accomplished with the buttons at the bottom of the Assignments panel or by means of right-clicking over the yellow warning triangle.

The InCopy user can look at the story in any of 3 different views: Galley, Story, or Layout view, where writing to fit can be done visually. When done with editing, he or she Saves Content, and then Checks-In the story, and can work on a new story or close the .icma assignment document. InCopy is designed to replace or augment Microsoft Word as the word processor in your workflow.

What the InDesign graphic designer does afterward

When the story is saved and checked back in by the InCopy writer/editor, the status of the .icml file will show as out of date. The InDesign user looks at the Assignments panel and sees the story that has the yellow warning triangle. He or she clicks Update and the text is relinked into the layout, giving the InDesign document the same text that the InCopy user edited.