



INCOPY WORKFLOW

This document details the process steps for the InCopy “Live Edit” workflow. In this workflow, stories are created in Word or InCopy, then text is placed into InDesign. InCopy can then be used to edit the text as it appears in the InDesign layout.

1. Story Creation

- a. Editors can start out writing their stories in either InCopy or Word using the supplied template files. These templates contain predefined paragraph styles which must be applied to the text, and a metadata table which must be filled in.
- b. When stories are complete and have passed through an (optional) editorial review process, they are ready to be placed into the InDesign layout.

2. Layout

- a. Before a story is placed into InDesign, the Word (.docx) or InCopy (.icml) file must be placed into the proper folder structure on the production server.
 - Ex: /Production Folders/ART/IN PROGRESS/AUTP-140800/InCopy/example.icml
- b. In **InDesign**, with the editorial template open and ready for layout, select **File>Place** and then select the InCopy/Word file to place it into the layout.
- c. Place the imported text onto the pasteboard.
 - When placing text from InCopy all styles should automatically import and display correctly. When placing text from Word, you must use the “Show Import Options” dialog box to map the styles. If you need help mapping styles please watch this video: <http://procedures.sourceinterlinkmedia.com/word2id.html>
- d. Before the text can be copy/pasted into the appropriate position on the layout, the text must be “checked out” to allow it to be edited. When you check out a piece of text, the text becomes “unlocked” for you, and “locked” for everyone else.
 - To Check Out the text, open the assignments panel by selecting **Window>Editorial>Assignments**. In the Assignments panel you will see the InCopy file. Select it and click on the **Check Out** button at the bottom of the panel.
- e. With the text checked out, you are free to **Cut** and **Paste** the copy blocks from the pasteboard text frame into the corresponding editorial template text frames.
- f. Once all the text is correctly placed into the template text frames, the text needs to be “exported” to allow editing in InCopy. Exporting will create an individual InCopy file for each text frame.
 - To export text frames, select **Edit>InCopy>Export>All Stories**. A dialog box will open and ask where to save the stories. Navigate to the InCopy folder (the same folder used in step 2a) and click **Save**.
- g. If “Track Changes” functionality is desired, it is recommended to enable Track Changes at this point in the workflow, so that it can remain on for the life of the story.
 - To enable Track Changes, select **Window>Editorial>Track Changes**. With the panel open select any of the text inside a frame on the document and under the track changes panel fly out menu click **Enable Tracking On All Stories**.
 - Alternatively, it is possible to only enable tracking on select text frames. To do so, select the desired text frame, and click **Enable Track Changes In Current Story** from the Track Changes pallet.
- h. Finally, in order to “release” the stories for Copy Editing, they need to be “Checked In.”
 - To Check In the text, open the assignments panel, click on the fly-out menu, and click **Check In All** stories before saving and closing the document.

3. Editing

- a. To edit a story after it has been placed in an InDesign layout open the InDesign file in InCopy.

- Note: Do not attempt to open the InCopy files for editing. After the original InCopy or Word file is placed in InDesign they are no longer edited individually. Only the InDesign document should be opened and edited in InCopy.
- b. With the InDesign document open in InCopy, stories can now be Checked Out allowing text edits to be made in the document.
 - To Check Out the text, open the assignments panel by selecting **Window>Editorial>Assignments**. In the Assignments panel you will see the InCopy stories that were created in InDesign. Select the stories you want to edit and click on the **Check Out** button at the bottom of the panel.
- c. If Track Changes were not previously enabled, they can be enabled in InCopy as well.
 - To enable Track Changes, under the **Changes** menu select **Enable Track Changes On All Stories**.
 - If using Track Changes, changes will only be viewable in the Galley and Story viewing modes. Track changes is not viewable in the layout mode. Text changes that are made will appear highlighted in the users color, which is predefined in the user settings.
- d. Finally, in order to “release” the stories for others to Edit, they need to be “Checked In.”
 - To Check In the text, open the assignments panel, click on the fly-out menu, and click **Check In All** stories before saving and closing the document.
- e. When a change has been made to the InDesign document from InCopy and opened again in InDesign, it will show a modified link(s) in the Links panel. These links will need to be updated in order for the changes to be displayed in InDesign.

4. Ship To Press

- a. Before files ship to press, the InCopy links need to be removed from InDesign.
 - To remove the InCopy links in InDesign, open the Assignments panel in InDesign by going to **Window>Editorial>Assignments**. Select all InCopy stories in the assignments panel and then click the **Trash** button in the lower right hand corner of the Assignments panel.