

Using Smart Connection with InCopy

Users Guide

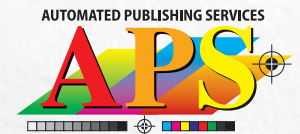


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1 Introduction

1.1 WELCOME

Welcome to Smart Connection for InCopy, a prominent member of WoodWing's Smart Publishing Team. Smart Connection is a powerful workflow solution aimed at publishing environments where Adobe InDesign and InCopy drive production. Smart Connection allows designers to work on a layout while editors write content—simultaneously. One can even assign different stories from one page to separate editors. Editors have the ability to see how their copy will rest on the designed page. Smart Connection's easy-to-use interface is one of its much appreciated features, while its open architecture allows quick and flexible integration with a variety of platforms and systems.

The features that Smart Connection adds to your version of InCopy are numerous and contain many different options. This chapter highlights all the areas of InCopy that have changed by the installation of Smart Connection; the chapters following this chapter will cover each option in more detail.

1.2 PERMISSIONS

It is important to know that your administrator can control some of your basic InCopy functionality—as well as restrict the availability or functionality of certain Smart Connection options—when working on documents that are stored in Enterprise. This is done by using Access Profiles which are associated with your user account. It may therefore be that you will not be able to use

certain InCopy features such as applying character styles or paragraph styles, selecting fonts or font styles, editing Sticky Notes, etc. when working on files that are stored in Enterprise. configured Smart Connection for you so you should be ready to start Smart Connection in InCopy straight away.

The purpose of controlling certain functionality this way is to guarantee the content of the layout or article and to prevent any changes that don't conform to the Brand style. Restrictions can also be linked to a particular Workflow Status, so it may be that access to Smart Connection features changes depending on the status that a layout or article is in.

This all means that you may come across options in this User Guide that you may find you don't always have access to. Wherever an option is described that can be limited by an Access Profile setting, this will be indicated by an icon.

2 Quick Start

2.1 QUICK START OVERVIEW

Before getting to grips with all the many features of Smart Connection, you may first want to know how to get started with the product for every day use. This chapter does just that: it will guide you through some of the most often used tasks when using Smart Connection in InCopy. Once you know your way around the product, you can learn more about each feature by reading through the rest of the User Guide.

The following tasks are covered in this chapter:

1. Logging In
2. The Smart Connection panel
3. Searching for files
4. Creating an article
5. Checking out an article
6. Closing an article
7. Logging out

2.2 LOGGING IN

Step 1: From the Smart Connection menu choose the Login option (1). The Login dialogue will appear (2) (see figure 1)

Step 2: From the Login dialogue, select the Enterprise Server name from the list provided.

Step 3: Enter your Username & Password to complete the login.

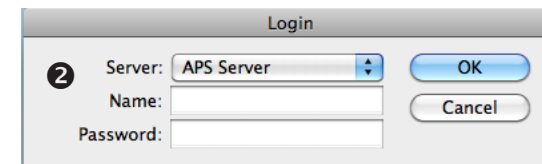
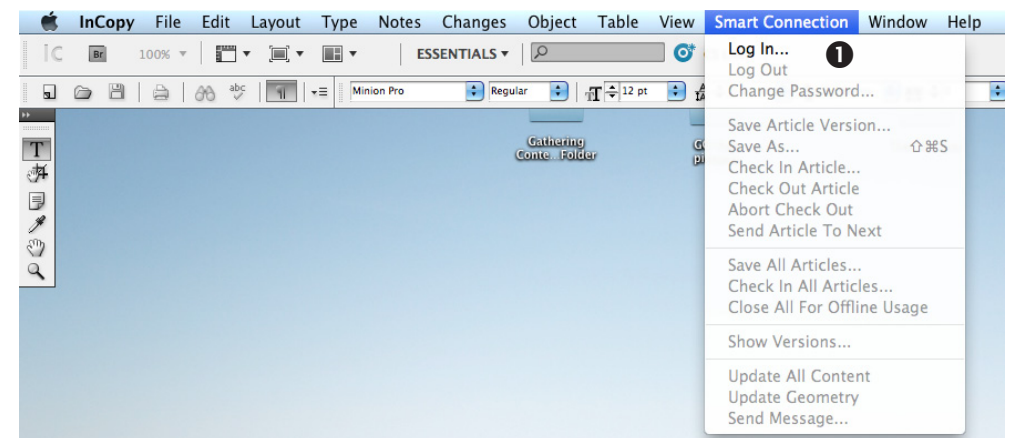



Figure 1

2.3 THE SMART CONNECTION PANEL

Once the user has successfully logged into the system then the Smart Connection Panel will appear (See figure 2). If this is the first time you have logged in and the Smart Connection Panel does not appear, then this can be activated from the Windows menu, choose the Smart Connection/ Smart Connection menu from the list provided. The Smart Connection panel is your main access to all the files stored in the Enterprise system. You will use it mainly to search for files by using one of its many search modes. Once you have found the file you are looking for, it can be opened (in case of layouts and Layout Modules) or placed on the layout (in case of articles, Layout Modules, and images).

 When opening a layout, it is **checked out** of the system. This means that other users cannot make any changes to the layout. This is indicated by the appearance of a pencil icon (✎) that appears for the file in the **In Use** By column of the Document pane in your Smart Connection panel. For all other users, a padlock icon (🔒) appears for that file.

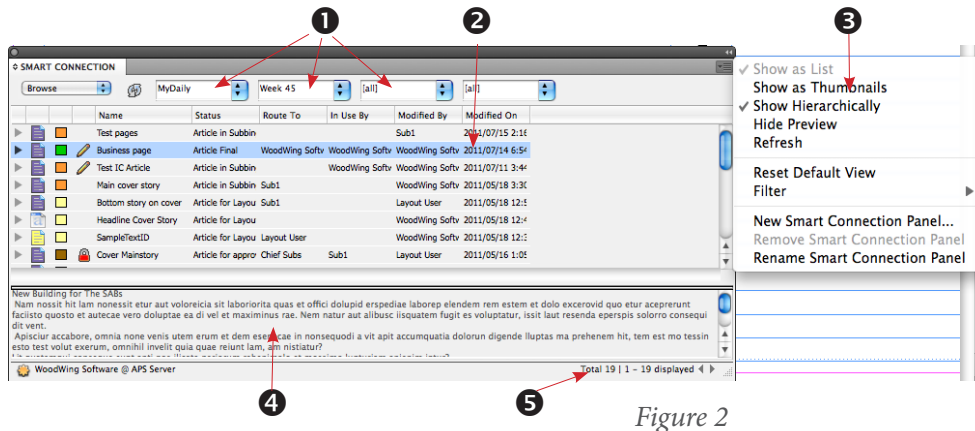


Figure 2

- 1 Search lists
- 2 Document pane
- 3 Flyout menu
- 4 Preview pane
- 5 Status bar

2.4 SEARCHING FOR CONTENT

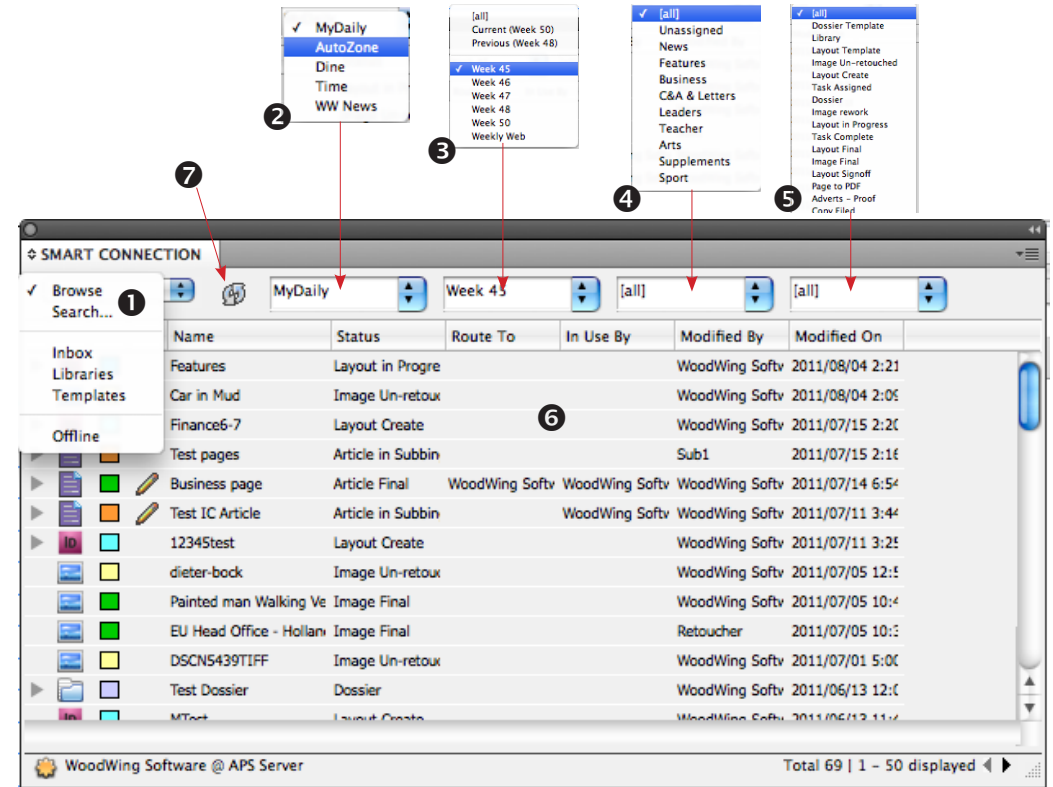


Figure 3

- 1 Search menu
- 2 Publication list
- 3 Issue list
- 4 Section list
- 5 Status list
- 6 Results/Document pane
- 7 Refresh/Search icon

Step 1: From the Search menu (1) select Browse.
Step 2: Make further selection from the Lists (2 3 4 5) provided
Step 3: Locate the document or article in the results pane (6) and double-click on it to open the object.
Step 4: Use the Refresh (7) icon to refresh the results to show changes.

2.5 CHECKING-OUT AN ARTICLE

Before being able to edit an article that is saved in Enterprise, it needs to be checked out. **Checking out** an article ensures that no other user can make changes to the content of that article while you are working on the file. To check out an article, do the following:

Step 1. In the Smart Connection panel, locate the article that you want to edit.

Step 2. Do one of the following:

- Double-click the article/object
- Right-click the article/object and choose Open from the context menu

When viewing the article in **Layout View**, you will be able to see the layout that the article is placed on. All articles that you have not checked out, or are not available to you, will appear dimmed. (See figure 4)

When viewing the article in **Story view** or **Galley view**, you will see only the text of the article, along with the relevant styling, but no graphics.

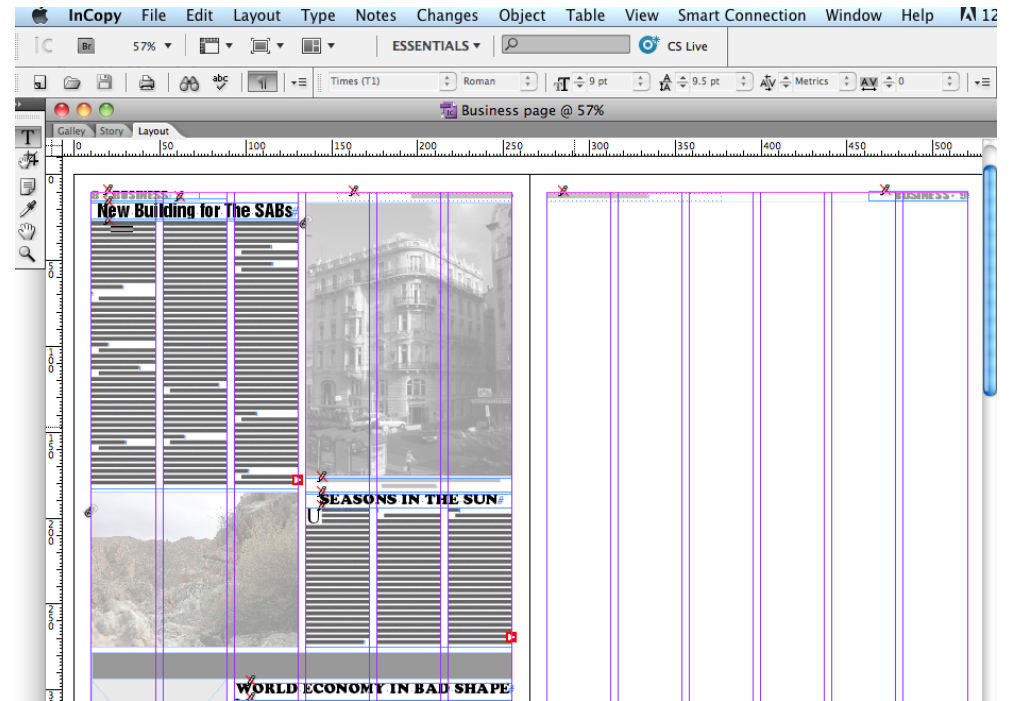


Figure 4 - Layout View

2.6 CHECKING-IN AN ARTICLE

Various methods exist for saving and/or checking-in the article, all available through the Smart Connection menu (1)

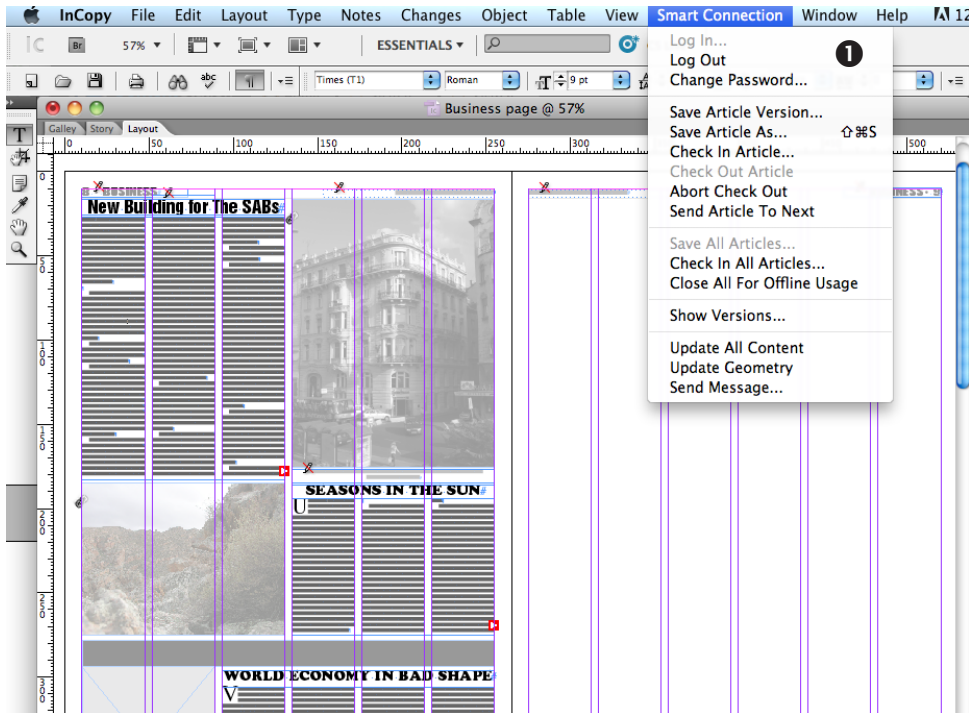
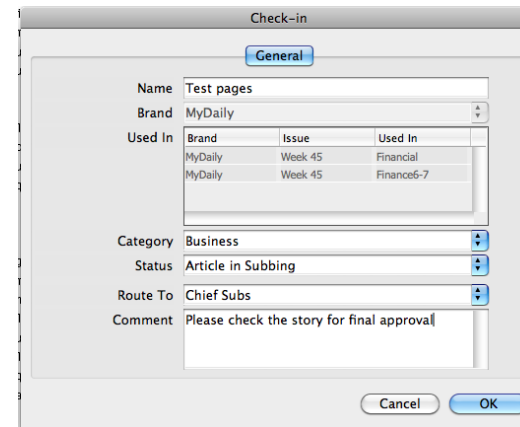


Figure 5

- **Save Article Version** - Saves an intermediate version of the article. A dialog box appears (2) for entering the required information. The original article stays open for editing.
- **Save As** - Saves a copy of the article. A dialog box appears (2) for entering the required information. The original article stays open for editing.

- **Check In** - Saves the article and closes it, making it available to other users for editing. A dialog box appears (2) for entering the required information.
- **Abort Check Out** - Closes the article without saving any made changes. The article will be available to other users for editing.
- **Close for Offline Usage** - Saves the file locally on your system so that it can be edited without being connected to Enterprise. The file stays unavailable to other users for editing.



2.7 LOGGING OUT

When finished working in InCopy, don't forget to log out of the Enterprise system. This makes sure that any panel settings are saved to the system so that you can make use of these settings when next logging in, even when logging in from another system.

- From the Smart Connection menu (❶) select **Log Out**

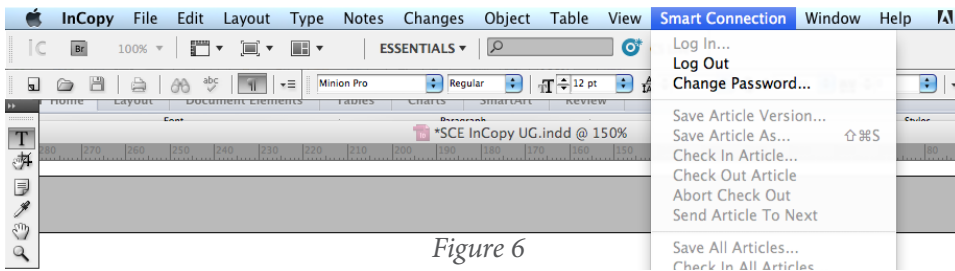


Figure 6

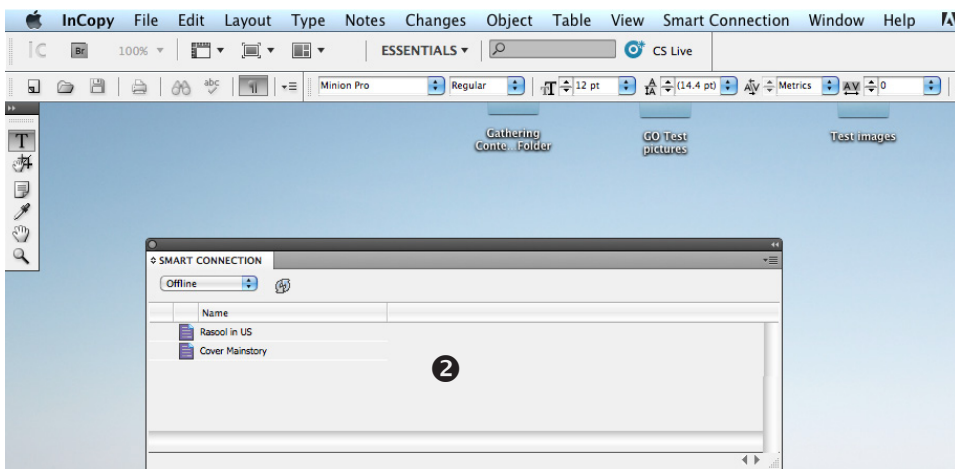


Figure 7

After logging out, the Smart Connection panel (❷) will appear in **Offline** mode, showing all files that you have taken offline.

Note: Offline files can be edited without being logged into Enterprise.

3 Using the Smart Connection Panel

3.1 SMART CONNECTION PANEL OVERVIEW

When using Smart Connection in InCopy, the Smart Connection panel is your main link to the files stored in the Enterprise database and will therefore be the panel that you will use most often.

Via this panel, you can locate files stored in the Enterprise system and subsequently manage them in many ways: open articles (layouts), edit or place files on the layout, route files to other users, and much more.

This chapter covers each panel option in detail.

3.2 ACCESSING THE PANEL

The Smart Connection panel displays automatically after signing in to Enterprise, but can also be accessed by choosing Smart Connection from the Smart Connection submenu of the Window menu.

By default, the panel opens in Inbox mode when first using Smart Connection, showing all files that have been routed to you by other users.

Each time you log off from Enterprise, the display settings for the Smart Connection panel are stored on the server, meaning that when you next log in even when using a different system the settings will be loaded that were last saved to the server.

3.3 PANEL COMPONENTS

The Smart Connection panel consists of the following components: (*see figure 8*)

- **Search pane.** (❶) The Search pane is used for specifying criteria in order to locate files that are stored in the Enterprise system. Its main component is the Search menu from which various modes can be chosen. Depending on the chosen mode, additional lists and/or entry boxes appear from which criteria can be selected or entered in order to further specify the search criteria. The results are subsequently shown in the Documents/Results pane. The Refresh button can be used to update the Documents/Results pane when needed.
- **Documents/Results pane.** (❷) Displays all files found based on the criteria specified in the Search pane.
- **Preview pane.** (❸) When selecting a file in the Document pane, the Preview pane will display a preview of that file.
- **Status bar.** (❹) Displays log-in information and information about the total number of files found.
- **Flyout menu.** (❺) Contains commands for changing the way files are displayed in the panel and for creating additional panels.

Each component is described in detail in the following sections (*see figure 8*).

Using The Smart Connection Panel

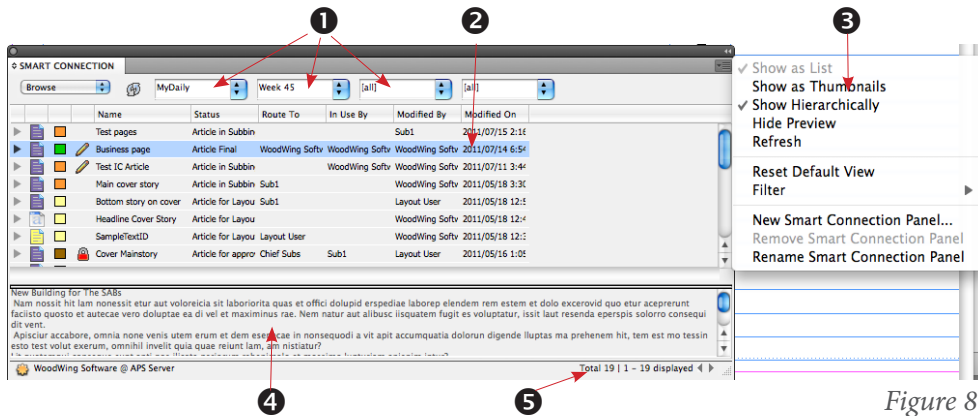


Figure 8

- 1 Search lists
- 2 Document pane
- 3 Flyout menu
- 4 Preview pane
- 5 Status bar

3.4 THE DOCUMENTS/RESULTS PANE

After setting criteria in the Search pane, the resulting files are subsequently displayed in the Document/Results pane.

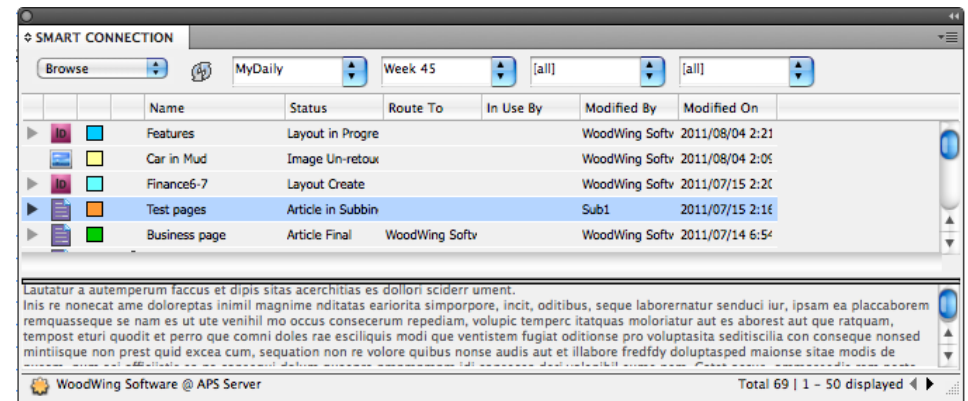
The Document/Results pane is your central area for managing files such as adding them to a Dossier, routing them to a user or user group, removing them from the system, and more.

The way that the files are displayed can be fully customized to suit your workflow by changing any of the following:

- **View mode.** View the results in List View or Thumbnail View.
- **Hierarchical view.** (List View mode only) Display files that have embedded content (such as layouts with placed articles, Layout Modules or images) as a group.

- **Changing columns.** (List View mode only) Add or remove columns or arrange them in a different order.
- **Sorting.** (List View mode only) Sort columns either individually or by group.
- **Font size.** (List View mode only) Change the size of the displayed text.

Each option is described in the following sections.



The Documents/Results pane in List View mode (Figure 9)

3.4.1 VIEW MODES

The Document pane can be displayed in two different view modes: List View (default setting) and Thumbnail View. Each mode can be selected from the panel's flyout menu:

- **Show as List.** List view mode.
- **Show as Thumbnails.** Thumbnail view mode

3.4.2 LIST VIEW MODE

The List view mode is the default mode of the Document /Results pane and displays the documents in a tabular form; each document is displayed on its own row with information pertaining to that document displayed in multiple columns (*see figure 9*).

Initially, only a limited number of columns are displayed but columns that are hidden from view can be easily displayed at any stage. (For more information about hiding or showing columns, see section Showing or Hiding Columns later in this section.)

The following table shows the columns displayed by default:

Column	Description
Type (Icon)	Icon designates the type of file (<i>see icons list figure 10</i>)
Status (Icon)	Colour of the workflow status that the file is in.
In Use By (Icon)	Indicated if the file is checked-out by user or not (<i>see figure 11</i>)
Name	Name of the file
Status	Workflow Status that the file is in
Route to	Name of the user that the file is routed to
In Use By	Name of the user that has Checked out the file
Modified By	Name of the last user to have modified the file
Modified On	The Date when the file was last modified

Placed On	Name of the layout that the item has been placed. Only applies to articles and images
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The following table shows the columns that are hidden by default.

Column	Description
Type	File type by name such as, layout, image, article etc.
Placed on page	Document page number(s) onto which the file is placed
Deadline	Colour of the Deadline that the file is on
Size	File size displayed in Gb, Mb or Kb
Word Count	(Articles only) Total number of words in an article
Character count	(Articles only) Total number of characters in the article
Line Count	(Articles only) Total number of lines in the article
Comment	Comment associated with the file
Slugline	(Text files only) shows first 250 characters
Page Range	Page numbering range
Planned Page range	Shows the planned page range that is provided by the Planning tool, Media Planner.
Brand	Name of the Publication/Brand of which the file is part
Category/Section	Name of the Category/Section of which the file is part
Issue	Name of the Issue that the file is part and is used in
Created By	Name of the user that created/uploaded the file

Figure 10 - Shows Type Icons












Type Icon	Description
	Article InCopy
	Article HTML text
	Article Plain text
	Ms Word Document
	Dossier
	InDesign layout
	Video
	Images
	Audio

Figure 11 - Shows the InUse Icons

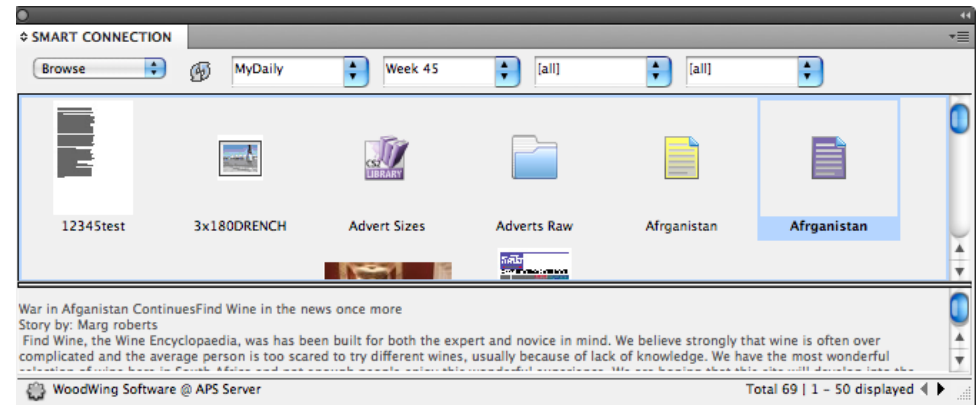
In Use By Icon	Description
	Yellow Pencil: The current user has the file open or checked-out, or has the files Properties dialogue open
	Yellow Padlock: Another user has the file open check-out, or has the files Properties dialogue open.

3.4.3 THUMBNAIL VIEW MODE

With the Document pane in Thumbnail View mode, a preview is displayed of each file, showing what the content of that file looks like. This can be especially handy when viewing layouts or images. Below each preview, the file name is listed.

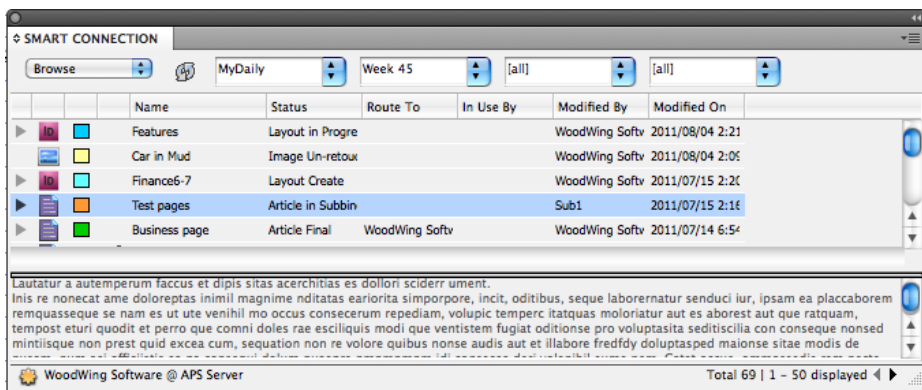
A thumbnail is not shown for:

- Articles or text files
- Audio, video, and Flash files
- Graphic files such as .AI, .EPS, and .PDF files
- Dossiers and libraries
- Files for which a preview has not been generated (yet)



3.4.4 HIERARCHICAL VIEW MODE

The Hierarchical View groups together files with their embedded content, such as layouts with placed items articles, Layout Modules, or images as well as articles consisting of multiple components. This is very similar to the List View.



3.5 CHANGING COLUMNS IN DOCUMENTS/RESULTS PANE

When in List View mode, the view of the displayed columns can be changed in the following ways:

- Columns can be made wider or narrower
- Columns can be hidden or displayed
- Columns can be rearranged
- Columns can be sorted
- The font size can be changed

Each option is described in detail in the following sections.

3.5.1 CHANGING COLUMN WIDTHS

To change the width of a column, do the following:

- Step 1.** Place the mouse pointer over the column divider to the right of the column of which the width needs to be changed.
The mouse pointer changes into an arrow pointing left and right .

Step 2. Do one of the following:

- Drag the divider to the left to make the column narrower.
- Drag the divider to the right to make the column wider.

3.5.2 SHOW OR HIDE COLUMNS

To show or hide a column:

Step 1. Ctrl-click (Mac OS) or Right-click (Windows) a column header. The column that is going to be added appears to the right of this column.

A context menu appears showing all available columns. Columns that are currently visible have a check mark in front of their name, columns that are currently hidden do not have such a check mark.

Step 2. Click on a column name.

The context menu disappears. If the column was previously hidden, it will be displayed; if the column was previously displayed, it will be hidden.

Step 3. (Optional) Repeat Steps 1 and 2 until all columns are displayed or hidden as needed.

The order of the columns in the context menu is determined by the order in which the columns are rearranged.

3.5.3 REARRANGE COLUMNS

To rearrange columns in a different order, do the following:

- Step 1.** Drag the header of the column that needs to be moved to another location over the column divider between the two columns where you want the column to be placed.

The mouse pointer turns into a fist and the column divider is displayed in red.

Step 2. Release the mouse button.
The column is moved to its new position.








3.5.4 SORTING COLUMNS

Columns can be sorted in ascending or descending order either individually or combined by doing the following:

Sorting individually. Click once on any column header. If the column was previously not sorted, it will be sorted in descending order. Any subsequent clicks will sort the list in the opposite direction. The order is shown by means of a black triangle pointing up or down next to the column header name.

Sorting multiple columns. To sort the list according to the criteria of multiple columns, click once on the first column header and Shift-click each subsequent column header. The columns will be sorted in the order they are clicked. A hollow triangle pointing up or down is shown next to the column header name. Multiple column sorting can be disabled by single clicking any column.

3.5.5 ICONS

Column	Icon	Description
In Use By		Yellow pencil - You have the file opened for editing or have opened the Properties dialogue box for that file
		Red pencil - You have taken the file Offline
		Yellow Padlock - Another user is editing file or has opened the Properties dialogue box of that file.
		Red Padlock - Another user has taken the file Offline
		Brown Flag - An update from the Planning tool, Media Planner, is available.
Hierarchical View		Chain/Link icon - Shows components of any placed article
Deadline Icons		Gray - Object has no Deadline Green - Object is well within Deadline Yellow - Object is nearing its Deadline Red - Object has passed its Deadline

3.5.6 TEXT FORMATTING

For any changes to the state of a file such as changing the properties of a file in its Properties dialog box the formatting of the text itself is changed for that particular file:

Bold. Newly added files are placed at the top of the list and displayed in bold font style. When using the Refresh option, the entries will be displayed in normal style and sorted according to the column sorting order.

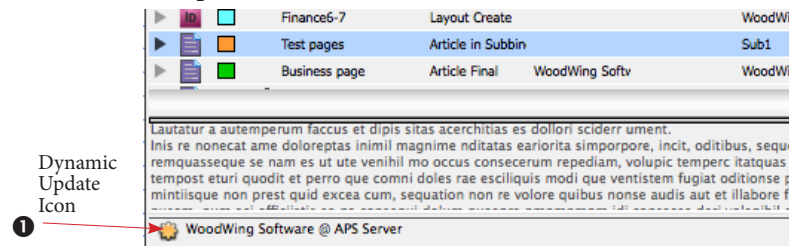
Italic. Files for which the properties have changed are shown in italic. When using the Refresh option, the entries will be displayed in normal style.

3.6 UPDATING THE DOCUMENT/RESULTS PANE

Updating the content of the Document pane is mostly done automatically by means of the Dynamic Update feature. Under certain circumstances however, this needs to be done manually.

3.6.1 DYNAMIC UPDATE

The content of the Smart Connection panel is automatically updated by means of the Dynamic Update option as indicated by the Dynamic Update Icon in the status bar of the panel.



Dynamic Update is active in all views with the exception of the Thumbnail view and certain Search modes. When the dynamic update feature is not active, the icon will be dimmed(🔒).

As the update occurs, you automatically see status changes, for instance if a file is checked out.

3.6.2 MANUAL REFRESH

The panel content can be refreshed manually by using either the Refresh button or the Refresh command in the panel flyout menu.

Using Refresh will perform the following actions:

- Deleted files will be removed.
- Newly added items that were placed at the top of the list and displayed in bold are sorted according to the sorting rules set and presented regularly.
- Changed items that were displayed in italic are presented regularly.
- Hierarchy View will become available for newly added files.
- After making a selection in one of the Search lists, the Document pane will be populated with the results.

3.7 THE PREVIEW PANE

When selecting a file in the Document pane, the Preview pane displays a preview of that file. If no preview is available (for instance when no thumbnails were saved with a layout or image), the application icon is shown. For text files, the first 250 characters are displayed.

To display or hide the Preview pane, choose Show Preview or Hide Preview respectively from the panel flyout menu. (see figure 10)

The size of displayed text (when previewing an article) can be controlled by a preference.

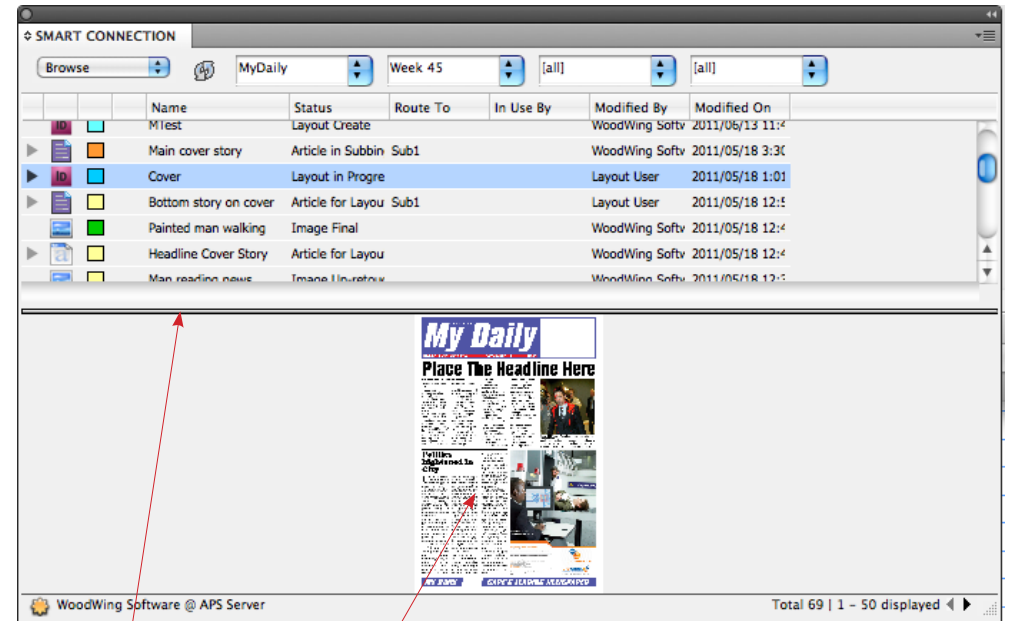
The size of the Preview itself can be controlled by reducing or increasing the size of the Preview pane.

To change the size of the Preview area, do the following:

Step 1. Place the mouse pointer over the **Resize Control Bar** between the Document pane and the Preview pane.

When doing so, the cursor will change to a double-headed arrow.

Step 2. Drag the **Resize Control Bar** up or down to resize the preview area as required.



- ① Resize control bar
- ② Preview area

Figure 10 - The preview pane shows a preview of the selected file

3.8 THE STATUS BAR

The Status Bar at the bottom of the Smart Connection panel shows the following information (see figure 11):

- Dynamic Update status
- User name and name of the Enterprise server to which you are logged in to
- Result totals

Dynamic Update status

The Dynamic Update icon (❶) is colored orange (🔧) when Dynamic Update is active, and gray (🔧) when the Dynamic Update is not active. (For more information about Dynamic Update, see section 3.6.1)

User Name and Name of Enterprise server

The name of the user and the name of the Enterprise server that was logged in to (❷) is displayed in the following format: [user] @ [Enterprise server].

Results Totals

When locating files using a Search mode in the Search pane, the total number of files found is displayed on the far right in the Status bar (❸). When the results exceed the default maximum of 100 files, the results will be displayed in groups of 100. The currently displayed group is also shown. The display format is as follows:

Total [total number of files found] | [first file # of displayed group — last file # of displayed group] displayed

When multiple result groups exist, Previous and Next buttons (❹) can be used to navigate through the groups.

(Figure 11)



- ❶ - Dynamic icon
- ❷ - Enterprise Server name
- ❸ - Search Results
- ❹ - Navigation buttons

3.9 FLYOUT MENU

The Flyout menu of the Smart Connection panel gives you access to 10 additional commands:

Show as List

Displays the Document pane in List view mode; each document is displayed on its own row with information pertaining to that document displayed in multiple columns.

Show as Thumbnails

Displays the Document pane in Thumbnail view mode; each document is shown as a small preview, thereby making it easy to see the content of the file.

Show Hierarchically

Groups together files with their embedded content as long as that content is stored in Enterprise such as InDesign files with placed articles and/or images, or articles that consist of multiple components. An expander (▶) will appear in front of such files which can be twirled open to show the content, or twirled closed to hide the content from view.

Show/Hide Preview

Choosing Show Preview or Hide Preview opens or closes the Preview pane respectively. When selecting a file in the Document pane, a preview of the file is shown in the Preview Pane. This could for instance be a preview of a layout, an image, or the first 250 characters of an article.

Refresh

Choosing the Refresh command in the flyout menu is similar to clicking the Refresh button in the Search pane. It is used to refresh the content of the Document pane.

Reset Default View

Brings the Smart Connection panel back to its default state (The Document pane in List view mode with the Inbox Search active).

Filter

Displays a submenu containing various file types by which the Document pane can be filtered. When a file type is selected, only files of the selected type are shown in the Document pane (multiple selections are possible); when a file type is not selected, such files are not shown in the Document pane. Options are as follows:

- **Layout.** InDesign layouts.
- **Article.** InCopy articles.
- **Image.** Image files.
- **Layout Module.** InDesign Layout Modules.
- **Dossier.** Dossiers or Job bag
- **Other.** All file types other than those listed above.

New Smart Connection Panel...

Creates a new Smart Connection panel in addition to the one(s) that already exist.

Remove Smart Connection Panel

Removes the current Smart Connection panel.

Rename Smart Connection Panel


Allows you to rename Smart Connection panels.

In addition to the nine commands mentioned, newly created Smart Connection panels are also listed at the bottom of the flyout menu. This makes it easy to bring a Smart Connection panel back into view after hiding it.

4 Smart Connection Tool bar

A Smart Connection toolbar is added to the InCopy interface and contains buttons for easily accessing the often used features Send Article to Next, Update Geometry, and Send Message.

The toolbar is accessed by choosing Smart Connection Toolbar from the Smart Connection submenu of the Window menu.

 For easy access, dock the toolbar in the main toolbar area of the InCopy interface, or use it as a floating toolbar close to the area where you are working.

This chapter describes in detail how to use the toolbar.

4.1 INTERFACE

The Smart Connection Toolbar consists of the following components:



Smart Connection Tool bar

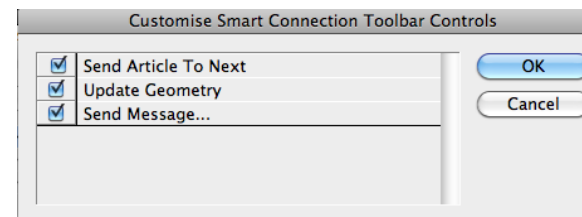
- **Send Article to Next.**(①) Used for automatically sending the article to the next status in the Workflow.
- **Update Geometry.** (②) Used for automatically updating the article with the latest available geometry information.

- **Send Message.** (③) Used for sending a message to the designer of the layout of which the article is part.
- **Customise.** (④) Used for defining which toolbar buttons should be displayed or hidden.

4.2 CUSTOMISE THE TOOLBAR

In order to hide or display the buttons in the toolbar, do the following:

Step 1. From the flyout menu, choose Customise. The Customise Smart Connection Toolbar Controls dialog box appears.




Step 2. Do one of the following:


- Select a check box to display the button from the toolbar
- Clear a check box to hide the button from the toolbar
- At least one button needs to be selected.


Step 3. Click OK for the changes to take affect or click Cancel to close the dialog box without making any changes to the toolbar.

5 The Resize Text Frame Toolbar

When a layout designer places an article on a layout, the location and size of the frame that holds the article and its components is stored in the Enterprise system. When subsequently opening the article in InCopy, the Resize Text Frame toolbar allows you to change the position or size of these text frames.

 Changing the text frame properties this way is only possible if your administrator has given you sufficient access rights.

 The Resize Text Frame toolbar can be accessed by choosing *Resize Text Frame Toolbar* from the *Smart Connection* submenu of the *Window* menu.

 For easy access, dock the toolbar in the main toolbar area of the InCopy interface, or use it as a floating toolbar close to the area where you are working.

This chapter covers in detail how to use the Resize Text Frame toolbar.

5.1 COMPONENTS

The Resize Text Frame toolbar contains the following components:

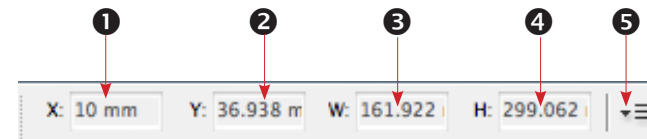



Figure 12 - Resize Text Frame toolbar

- **X coordinate.** (❶) The X coordinate value of the text frame that holds the article or article component.
- **Y coordinate.** (❷) The Y coordinate value of the text frame that holds the article or article component.
- **Width.** (❸) The width value of the text frame that holds the article or article component.
- **Height.** (❹) The height value of the text frame that holds the article or article component.
- **Flyout menu.** (❺) Holds commands for adding or removing a line to the article or article component.

5.2 USING THE RESIZE TEXT FRAME TOOLBAR

Using the Resize Text Frame toolbar is only possible under the following conditions:

- When the opened article is placed on a layout.
When the article is opened together with layout geometry information.
- When the article is viewed in Galley view or Layout view (not in Story view).
- When you have been given sufficient access rights by your administrator.


 *When the functionality of the Resize Text Frame toolbar is not available, the toolbar appears dimmed and no values are displayed:*

5.3 CHANGING THE TEXT FRAME POSITION

To change the position of the text frame that holds the article or article component, do the following:

- **Step 1.** Place the cursor in the text that is part of the frame that needs to be moved.

The current dimensions of the text frame are displayed in the Resize Text Frame toolbar.

 *Although this can be done both in the Galley view as well as in the Layout view, we advise to perform this action when in Layout view so that the effect in relation to other layout items can be seen.*

- **Step 2.** In the Resize Text Frame toolbar, change the value of the **X coordinate** and/or the **Y coordinate**.
- **Step 3.** To implement the change, do one of the following:
 - Press the Tab key to tab to another box in the toolbar.
 - Press Shift+Tab to keep the changed value selected.
 - Click anywhere in the document.

5.4 CHANGING THE TEXT FRAME SIZE

Changing the size of a text frame that holds an article or article component, can be done in two ways:

- **By entering exact values.** Use this method when you know exactly what the size of the frame should be.
- **By adding or removing lines.** Use this method when you just want to remove or add some space that is equivalent to a line space (leading).


Each method is described in the following sections.

5.4.1 ENTERING EXACT VALUES

To change the size of the text frame that holds the article or article component by entering exact values, do the following:

- **Step 1.** Place the cursor in the text that is part of the frame that needs to be moved.

The current dimensions of the text frame are displayed in the Resize Text Frame toolbar.

 *Although this can be done both in the Galley view as well as in the Layout view, we advise to perform this action when in Layout view so that the effect in relation to other layout items can be seen.*

- **Step 2.** In the Resize Text Frame toolbar, change the value of the **Width** and/or the **Height**.
- **Step 3.** To implement the change, do one of the following:
 - Press the Tab key to tab to another box in the toolbar.
 - Press Shift+Tab to keep the changed value selected.
 - Click anywhere in the document.

5.4.2 ADDING OR REMOVING LINES

To change the size of the text frame that holds the article or article component by adding or removing lines, do the following:

- **Step 1.** Place the cursor in the text that is part of the frame that needs to be moved.

The current dimensions of the text frame are displayed in the Resize Text Frame toolbar.



Although this can be done both in the Galley view as well as in the Layout view, we advise to perform this action when in Layout view so that the effect in relation to other layout items can be seen.

- **Step 2.** From the flyout menu of the Resize Text Frame toolbar, choose **Add Line** to add an extra line, or **Remove Line** to remove a line.

6 Using Sticky Notes

Sticky Notes are short messages that can be placed anywhere in the layout as a way of communicating with other users or to act as reminders for yourself.

This way, you can for instance leave your colleagues instructions about making changes to certain content on the layout, or leave yourself reminders on changes you want to make yourself.



In InCopy, Sticky Notes can only be displayed and created when in Layout View mode.

This chapter describes in detail how to work with Sticky Notes.

6.1 THE STICKY NOTE TOOL

Smart Connection adds a Sticky Note Tool to the InCopy Tools panel with which Sticky Notes can be created. The Sticky Note tool is placed after the Position tool.



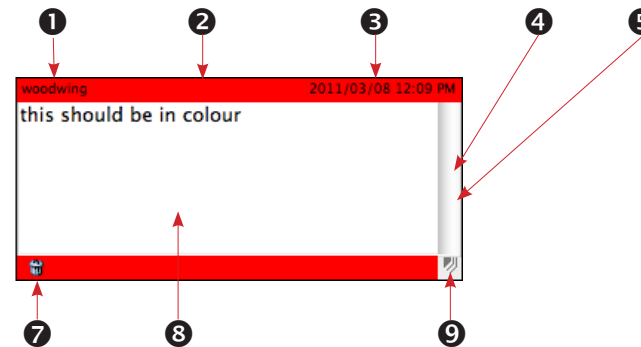
1 - Sticky note tool

The InCopy Toolbar with Sticky Notes tool

For detailed information about how to use the Sticky Note tool.

6.2 A STICKY NOTE

The Figure below shows the components of a Sticky Note:



- **User Name (1)** - Shows the name of the user who created the note.
- **Colored border (2)** - Color as assigned to the user by the administrator.
- **Creation Date & Time (3)** - Date and time when the Sticky Note was created (shown in system time's format).
- **Scrollbar (4)** - Use to scroll through the text when the window size is too small to show all the text at once.
- **Up/Down buttons (5)** - Use to scroll up or down the text line by line when the window size is too small to show all the text at once.
- **Resize Handle (9)** - Use to change the size of the Sticky Note.

- **Text Area (Ⓢ)** - Area for entering text. Font type, face and size are set by default and cannot be changed.
- **Delete Button (Ⓩ)** - Use to remove the Sticky Note from the layout.

6.3 CREATING A STICKY NOTE

To create a Sticky Note, do the following:

- **Step 1.** Make sure that you view the article in Layout View.
- **Step 2.** Select the **Sticky Note tool** in the Tools panel. The mouse pointer will change into the Sticky Note icon (Ⓢ).
- **Step 3.** Do one of the following:
 - Click once anywhere on the layout to create a default-size Sticky Note.
 - Click and drag the mouse pointer anywhere on the layout and release when the desired size is achieved.
- **Step 4.** Click inside the text area to type a message.



Creating a Sticky Note is also possible when not logged in to Enterprise, but only on articles that have already been saved to the Enterprise system.

The Sticky Note tool cannot be used when:

- The article is not part of the Enterprise system
- The article is opened as Read-only
- You are viewing the article in Galley view or Story view
- You have not been given sufficient access rights by your administrator.

Under these scenarios, the Sticky Note icon in the toolbar appears dimmed or the mouse pointer appears as the In Use icon (Ⓢ), indicating that no Sticky Note can be placed.

6.4 STICKY NOTES IN OFFLINE MODE

When logged out from Enterprise and opening an offline article, any Sticky Notes that are already part of the layout will appear as unavailable and cannot be edited.

As soon as you log in to Enterprise, these Sticky Notes will automatically become available and will be synchronized with any changes that may have been made by other users during the time that the document was offline.

It is possible to add new Sticky Notes to the offline article while logged out of Enterprise. Of course, these Sticky Notes are fully editable when working on the layout offline.

6.5 EDITING STICKY NOTE CONTENT

To edit the text in a Sticky Note, simply place the cursor inside the text area (it is not necessary to first select the Type tool).



Editing a Sticky Note is only possible when you have been given sufficient privileges by your administrator.



When not logged in, the only Sticky Notes that can be edited are those that have been created during this offline period. All other Sticky Notes will appear as unavailable.

6.6 RESIZING A STICKY NOTE

After creating a Sticky Note, it can be resized at any time by doing the following:

- **Step 1.** Click and hold the handle bar in the lower right-hand corner of the Sticky Note and freely move the mouse pointer.
- **Step 2.** Release the mouse button when the desired size is achieved.

6.7 REPOSITIONING A STICKY NOTE

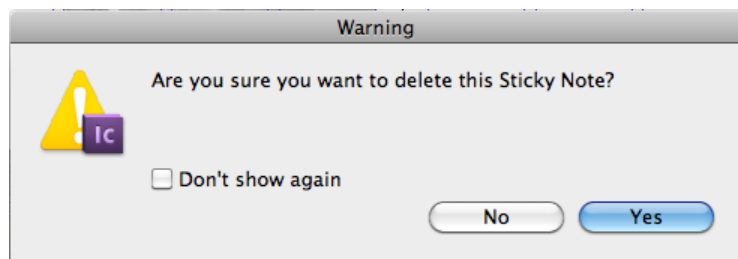
A Sticky Note can be repositioned at any time, by doing the following:

- Click and hold either the top or bottom colored border and drag with the mouse until the required position is reached.

6.8 DELETING A STICKY NOTE

It is possible to delete a Sticky Note, but only those that have been added by yourself. Sticky Notes that have been added by other users cannot be deleted. To delete a Sticky Note, do the following:

- Click the **Delete** button in the bottom left corner of the Sticky Note. A message appears, asking to confirm the action:



Respond to the message as follows:

- Click **Yes** to delete the Sticky Note.
- Click **No** to close the message and continue working without deleting the Sticky Note.
- (Optional) Select the check box **Don't Show Again** and click **Yes**. The message will not display anymore when next deleting a Sticky Note and the Sticky Note will be automatically deleted.



Deleting a Sticky Note is only possible when you have been given sufficient privileges by your administrator.

6.9 SHOWING OR HIDING A STICKY NOTE

Sticky Notes can sometimes get in the way when working on the layout and can therefore be hidden from view. When needed, all Sticky Notes can be displayed again.

To hide all Sticky Notes when in Layout view, do the following:

- In the View menu, choose **Hide Sticky Notes**.

To display all hidden Sticky Notes when in Layout view, do the following:

- In the View menu, choose **Show Sticky Notes**.

6.10 STICKY NOTES AS A MESSAGING SERVICE

One other aspect of Sticky Notes is that it can act as a messaging system. For instance: when you add a Sticky Note to an article that is placed on a layout on which an InDesign user is currently working, the Sticky Note will appear for the InDesign user as soon as you check-in or save a version of the article.

6.11 PRINTING OR EXPORTING A STICKY NOTE

Sticky Notes **do not print or export to PDF**, irrespective of the viewing modes chosen in InCopy.

7 Working with Articles

As an editor using InCopy, you will mostly work on articles that have either been created by other editors, or on articles that you may create yourself. If an article is already part of a layout, you will be able to see how and where the article is placed on that layout so that you can verify how the changes that you make affect the overall look and feel of the page.

While working on a placed article, the layout designer using InDesign might make changes to the size of the text frame. Since this obviously affects your copy fit, the designer can send you this new geometry information, or you can check yourself at any time if any changes to the geometry have occurred.

This chapter describes all aspects of working with articles in InCopy.

7.1 OPENING AN ARTICLE

An article stored in Enterprise can be opened in the following ways:

- **Using the Open command.** Opens the article as a regular file together with layout information.
- **Using the Open Without Design command.** Opens the article without layout information.
- **In Offline mode.** Opens the article that has been taken offline.
- **As Read-only.** Opens the article in read-only mode.

Each method is explained in the following sections.

Take note of the following scenarios that can occur during opening:

The article is already checked-out

In case the article is already checked out by another user, a message appears. Respond to the message accordingly

The article has been placed multiple times

In case the article has been placed multiple times on different layouts or Layout Modules, a message appears asking you which layout to open:



Respond to the message as follows:

- **Step 1.** Select the layout or Layout Module to open.
- **Step 2.** Click OK.
The article is opened with the layout information of the selected layout or Layout Module. Another message appears, this time reminding you that changing the content of the article can affect the placement of the article on the other layout(s).
- **Step 3.** Click OK to dismiss the message.
No real action is required, other than being aware that any changes you make to the article can have consequences to placed instances of the article on the other layout(s).


7.2 USING THE OPEN COMMAND

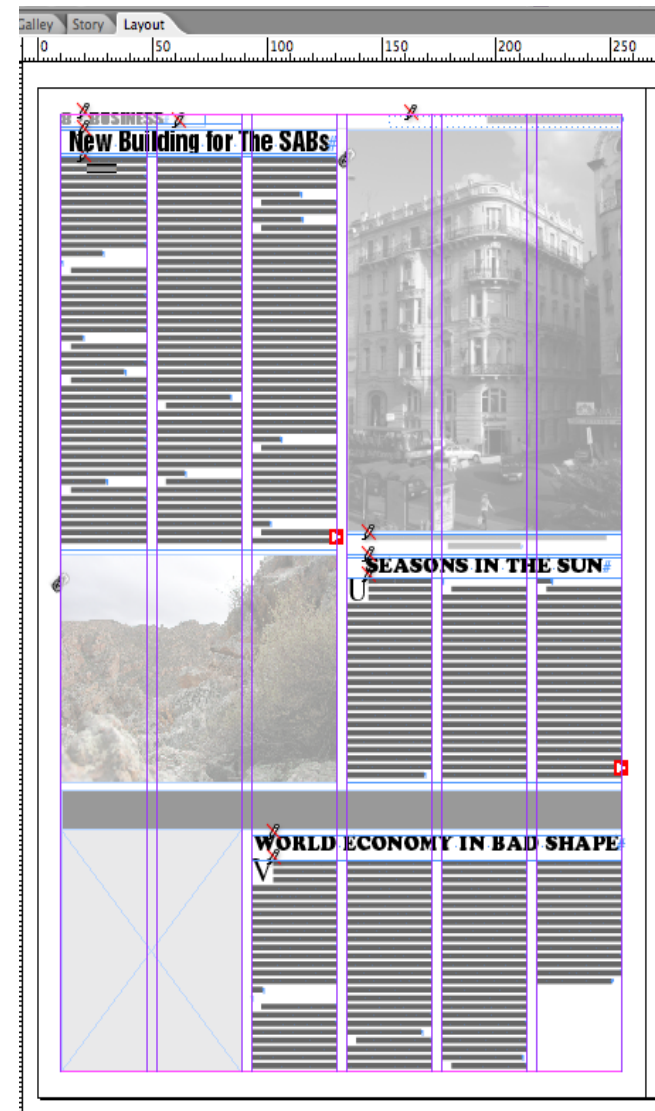
Articles stored in Enterprise can only be opened via the Smart Connection panel. To open an article, do one of the following:

- **Double-click** the article in the Smart Connection panel.
- **Right-click** the article in the Smart Connection panel and choose Open from the context menu.

The article is checked-out for you (opened for editing) as indicated by the yellow pencil icon () that appears for the file in the In Use By column of the Document pane in your Smart Connection panel. For all other users, a red pencil icon () appears for that file.

When the article has been placed on a layout, this layout can be viewed in the Layout view. This will give you precise information about where in the layout the article is placed and is a good way of seeing how any changes you make affect the appearance of the article in relation to the design or to other items on the page.

All items on the layout that cannot be edited can be recognized by a crossed-out pencil icon in the top left corner (). As a further indication, these non-editable items appear dimmed by default, (they can be displayed regularly by choosing **Undim Noneditable Objects** from the View menu).




When opening an article the regular way, the Layout view will display the layout on which the article is placed. All layout items that cannot be edited appear dimmed and show a slashed pencil icon in the top left hand corner of their frame.

7.3 CLOSING OR SAVING AN ARTICLE

Various methods exist for closing an article. Depending on the chosen method, any made changes can either be saved or discarded:

- **Check-in.** Closes the file, saves all content, creates a new version of the file, makes the file available to other users for editing. During saving, file properties can be changed.
- **Abort check out.** Closes the file, does not save any made changes, makes the file available to other users for editing. No file properties can be changed.
- **Save version.** Saves an intermediate version of the file, file stays open for editing. During saving, a limited number of file properties can be changed.
- **Save As.** Saves the file as a new file, the newly created file is open for editing. During saving, file properties can be changed.
- **Take offline.** Closes the file, saves the file locally, file stays unavailable to other users for editing. No file properties can be changed. 1
- **Close.** Same as Check-in, but no version is saved and no file properties can be changed.
- **Save Locally.** Saves the file locally instead of within the Enterprise system.

Using File > Save

 When choosing the Save command from the InCopy File menu to save an article that is stored in the Enterprise system, the article is saved locally and not saved to the Enterprise system. It will only be saved to the Enterprise system if you use one of the methods listed above.

Each method is explained in the sections on the following pages.

7.3.1 CHECK IN

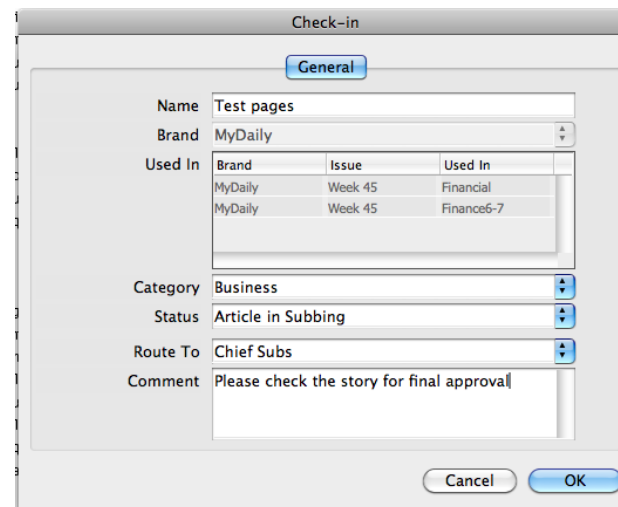
When checking in an article, the following actions take place:

- A version of the article is saved in Enterprise.
- The article is closed from InCopy.
- The article is made available to other users for check-out (as indicated by the Open For Editing pencil icon that is removed from the Smart Connection panel for that article.)


To check-in an article, do the following:

- **Step 1.** From the Smart Connection menu, choose Check In... . The Check In option is only available for articles that have been checked out and therefore not to articles that are opened as read-only.

The Check-In dialog box appears.



Brand	Issue	Used In
MyDaily	Week 45	Financial
MyDaily	Week 45	Finance6-7

 In case the article does not yet exist in Enterprise, the Save As dialog box appears instead. (For more information, see section 1. Adding an Article to Enterprise.)

- **Step 2.** (Optional) In the Name box, modify the article name or leave the original name.

The settings for **Brand**, **Issue** and **Category** cannot be changed.

The **Used In list** shows the current layout on which the article is placed and/or any Dossiers that the article is part of.

- **Step 3.** From the Status list, choose the status that the article should have.
- **Step 4.** (Optional) From the Route To list, choose a user or user group to whom the file should be routed to.
- **Step 5.** (Optional) In the Comment box, add a comment. When a user will next open the file, the comment will appear on screen.
- **Step 6.** Click OK.

7.3.2 ABORT CHECK OUT

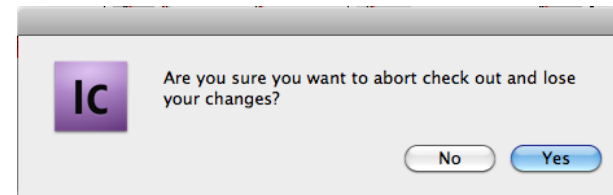
When using the Abort Check Out option, the following actions take place:

- The article is closed from InCopy and brought back to its original state the state it was in when it was opened or last saved using either Save Version or File > Save without saving any changes made since the last save action and without saving a version of the file.
- The article is made available to other users for editing (as indicated by the Open For Editing pencil icon that is removed from the Smart Connection panel for that article.

To use the Abort Check Out option, do the following:

- **Step 1.** Display the checked-out article on screen.
- **Step 2.** From the Smart Connection menu, choose Abort Check Out. The Abort Check Out option is only available for articles that have been checked out and therefore not to articles that are opened as read-only. Using Abort Checkout is only possible when you have been given sufficient access rights by your administrator.

A message appears asking to confirm the action. (See figure 2.2.)



- **Step 3.** Respond to the message as follows:
 - Click **Yes** to close the article without saving any changes
 - Click **No** to return to the article without closing it


7.3.3 SAVE VERSION

When using the Save Version option, the following actions take place:

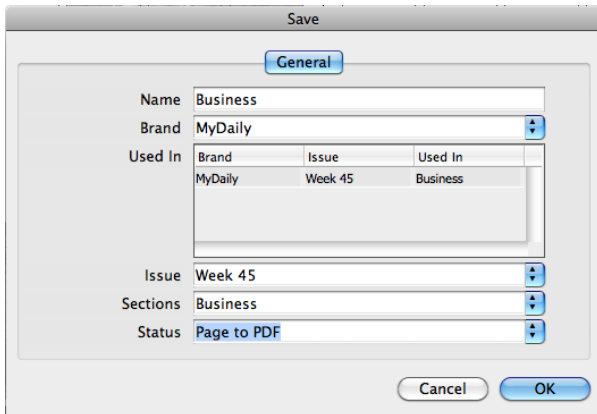
- An intermediate version of the article is saved. If needed, this version can be restored and made as the current version at any time.
- The article stays open for editing.

To use the Save Version option, do the following:

- **Step 1.** Make at least one change to the article.
- **Step 2.** From the Smart Connection menu, choose **Save Version...**

 The Save Version option is only available for articles that have been checked out and therefore not to those that are opened as read-only. The command is also not available if no changes have been made to the document since the last save action.


The Save dialog box appears. (See below)



Brand	Issue	Used In
MyDaily	Week 45	Business

Since a version of the current file is being saved, only a limited number of properties can be changed.

- **Step 3.** (Optional) In the **Name** box, modify the article name or leave the original name.

 The Used In list shows the current layout on which the article is placed and/or any Dossiers that the article is part of. (For more information about the Used In list, see chapter 21, Managing the Workflow – section 1, The Used In List.)

- **Step 4.** From the **Status** list, choose the status that the article should have.
- **Step 5.** (Optional) From the **Route To** list, if available, choose a user or user group to whom the file should be routed to.
- **Step 6.** (Optional) In the **Comment** box, if available, add a





comment. When a user will next open the file, the comment will appear on screen.

- **Step 7.** Click **OK**.

7.3.4 TAKE OFFLINE

Taking an article offline allows you to keep working on the file without being logged in to Enterprise (this way, you can for instance work on the file on a laptop when being away from the office without a network connection).

When using the Take Offline option, the following actions take place:

- The article is closed from InCopy.
- The article is saved locally.
- The yellow pencil icon () in the In Use By column in your Smart Connection panel changes into a red pencil icon (), indicating that the file is offline. For all other users, the yellow padlock icon () will change into a red padlock icon ().
- The article remains unavailable to other users for editing.

To take an article offline, do the following:

- **Step 1.** Display the checked-out article on screen.
- **Step 2.** From the Smart Connection menu, choose **Close for Offline Usage**.

The Close for Offline Usage option is only available for articles that have been checked out and therefore not to articles that are opened as read-only.

When the command Close for Offline Usage is not present in the menu, you have not been given sufficient access rights by your administrator.

7.3.5 CLOSE

When closing an article, the following actions take place:

- The article is closed from InCopy.
- The article is made available to other users for check-out (as indicated by the Open For Editing pencil icon that is removed from the Smart Connection panel for that article).

Note that contrary to the process of checking in an article, no version of the file is saved.

To close an article, do the following:

- **Step 1.** Use one of the following methods:
 - From the File menu, choose **Close**.
 - Click the **Close** button of the document window.

If the article does not contain any unsaved changes, the document is closed.

If the article does contain unsaved changes, a message appears:

- **Step 2.** Respond to the message as follows:
 - Click **Yes** to save the made changes and close the document.
 - Click **Don't Save** to close the document without saving the changes.
 - Click **Cancel** to return to the article without closing it.

Instead of seeing the message appear, you might see the Check In dialog box appear instead, depending on how your administrator has configured the system.