

Designers and Editors: Collaborating Without Tears

Anne-Marie Concepcion

amc@senecadesign.com

www.senecadesign.com

[linkedin.com/in/amconcepcion](https://www.linkedin.com/in/amconcepcion)

[fb.com/amconcepcion](https://www.facebook.com/amconcepcion)

twitter.com/amarie

Let's Play Together Nicely

Designers: What's faster and more accurate:

1. Allowing an editor to edit the live text in a story while you work on something else
2. Updating their changes to your layout without losing any formatting

OR

1. You sending an editor a PDF or paper printout to review their story
2. Them writing out the changes they want in little notes or comment tools
3. You making those changes, asking for clarification as needed
4. You sending the a second version of the PDF/printout
5. Them checking the new version against the old to make sure you made all the changes correctly
6. Them adding more change requests to version 2 because the reflowed story revealed other problems

Create a Shared Project Folder

The first thing you need to do is create one folder that all can access from their desktop. By "all" I mean everyone who needs to edit the publication: the designer/s, writer/s, artists, and photo editors.

There are ways to protect files from being deleted or changed inadvertently, and these are a combination of best user practices and tools and capabilities built into cloud sharing services.

Your options for creating such a folder:

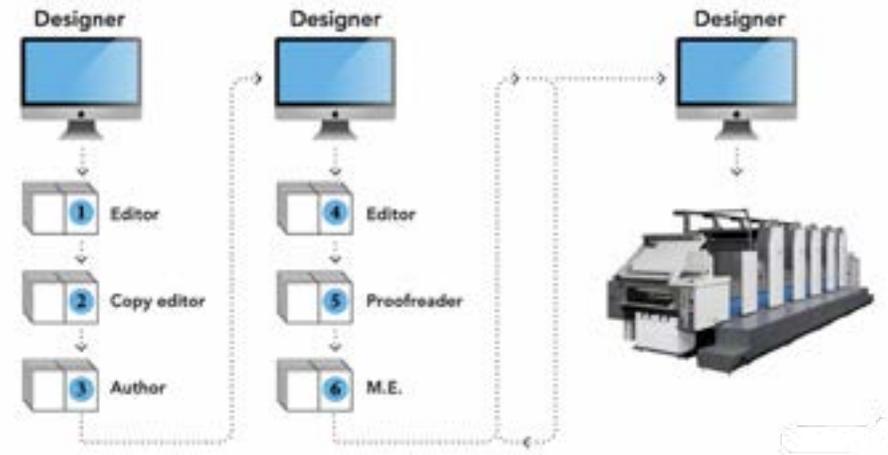
- Network file server
- Sharepoint/One Drive
- Dropbox
- Google Drive

What is key here is that the project folder **is shared with all other users in the production group** so that they all have read/write access to the files; that this folder **can be mounted on everyone's desktop** and files can be opened/saved directly to it (in the case of a local server) or that files are **automatically synced** from their desktops to the cloud and back.

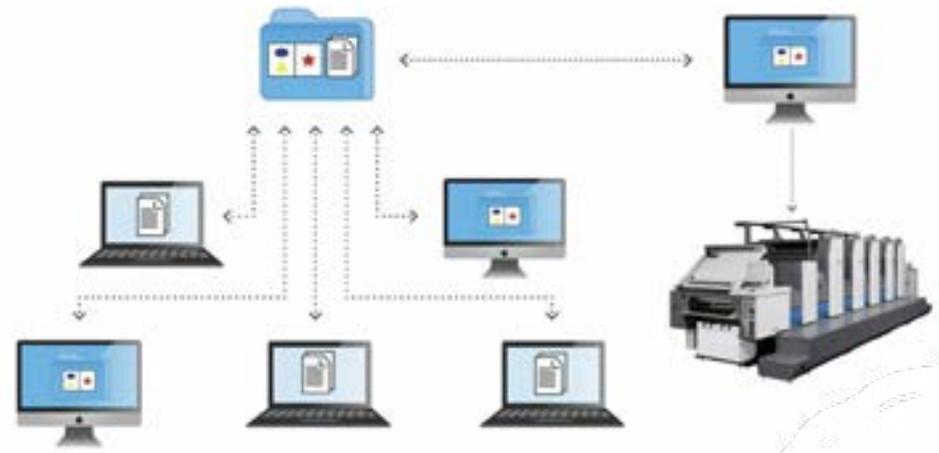
In other words, for collaboration to work fully, all participants work directly on files mounted on their desktops, and save files there. There is no uploading, downloading, or attaching files to emails for transfer.

If this is not possible, you can still implement some collaboration solutions that will save time; such as distributing proofs via Acrobat's or InDesign's Share for Review, or using EmSoftware's DocsFlow for Google Docs or WordsFlow for Word files.

Traditional Design/Editorial Workflow



Collaborative Design/Editorial Workflow



Options for Working Together

InDesign and InCopy

Cost: \$60/year for each InCopy user

No additional cost for InDesign users, as InCopy tools/panels are built-in

How it Works: The designer, working out of the shared folder, flows in any Word files and formats them as usual. They export the stories to InCopy format and put them in a subfolder at the same level as the InDesign file, and let their editorial colleagues know it's ready for them. The designer can continue working on the layout or close it and move on to another project.

At this point, any *InCopy* user can open that *InDesign* layout in InCopy, and choose which stories to work on. Multiple InCopy users can open the same layout concurrently. A built-in check-in and check-out system prevents more than one editor from working on the same story.

With InCopy, editors can:

- See exactly how their copy will look in the final layout
- Edit to fit the text frame
- Use the same type engine and styles as the InDesign user
- Use Track Changes and insert Notes in the copy as though they were using Word
- Print or export the layout to PDF if they prefer to mark it up there (but they themselves make the changes to the copy back in InCopy).
- Use the same Spell Check, User Dictionary, and Find/Change features as in InDesign

With InCopy, editors cannot:

- Change the position or size of any object, including text frames
- Add/remove pages
- Add or edit any styles
- Change the INDD file itself — they can only change the content of the text frames that the designer allowed them to edit

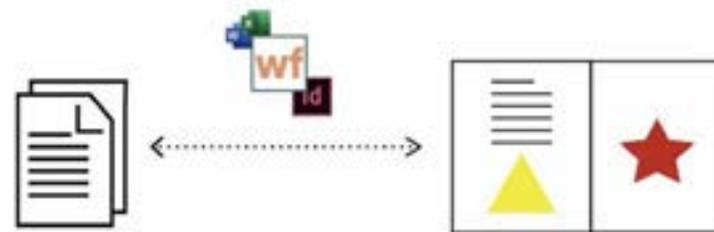
InDesign and Magic-Linked Word Files

Cost: \$300.00 per InDesign user for the WordsFlow plug-in from EmSoftware

No additional cost for the Word users, they use Word as before

How it Works: The writers and editors place their Word (or text, or RTF) files in a subfolder of the project folder as soon as their first draft is done*. The designer imports each Word file into InDesign using the plug-in (File > WordsFlow > Place with WordsFlow), which creates a link to the Word file, visible in the Links panel and via a WF badge on the text frame.

Text Files Live-Linked to Layout



*This workflow can be managed without a shared folder, too.

The designer formats the text as usual, including making text edits, new line breaks and paragraphs, and so on. If they want, they can update the Word file with their changes via the plug-in.

The writer can open the same Word file and continue working on it, making changes to text and formatting as they see fit. When they save changes, the link in InDesign shows the Out of Date icon.

When the designer updates the link to bring in the writer's changes, WordsFlow does a **"magic merge,"** feathering in the changes from the Word file but keeping the designer's formatting and text edits intact.

Text changes to a Wordsflow story by either the designer or editor are automatically tracked with InDesign's Track Changes and are visible in the Story Editor. Conflicts — when both the editor and designer made changes to the same text — are flagged by a Note that WordsFlow inserts automatically.

Using WordsFlow, designers can flow in text even before the story is final, and not be concerned that they'll have to "start over" as they would with InDesign's built-in text linking option, which is turned off by default.

Writers cannot see their story in the layout, so they can't write to fit, as they could with InCopy. However, designers could always supply them with a PDF, and instead of the writer marking up changes, they could make the edits themselves in the Word file, knowing that the designer will import them into the layout.

At any point, the designer can break the link to the Word file by choosing Embed Link from the Links panel menu, turning the story into a "normal" InDesign text frame. The designer can also export an existing story to a new, linked Word file using the plug-in.

InDesign and Magic-Linked Google Docs

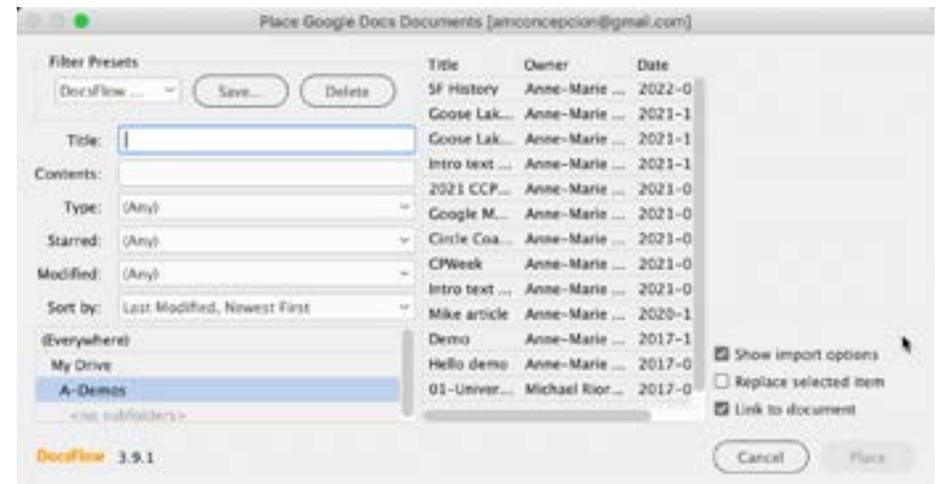
Cost: \$300.00 per InDesign user for the DocsFlow plug-in from EmSoftware

No additional cost for the Google Docs users

How it Works: The writers and editors create Google Doc files for insertion into an InDesign layout. They use the Share button in Google Docs to share the file with the designer so that the file appears in the designer's own Google Drive account online.

In InDesign, the designer logs onto their own Google Drive account using the DocsFlow plugin: File > DocsFlow > Place from Google Docs.

All of their Google Docs, their own and ones shared with them, appear in the DocsFlow dialog box. They can search and sort to find the Google Docs they want to import.



Placing a Google Doc works similarly to placing a Word file. The designer can map the HTML styles and overrides in the Google Doc to paragraph and character styles in their layout, or they can apply formatting after flowing in the story.

Linking to the Google Doc is optional; you can use the plug-in simply as a means of importing content from Google Docs.

If you do opt to link to the Google Doc file, then the linked text frames appear in the Links panel, and small DF (DocsFlow) badges appear on the text frames in the layout.

Designers can format and edit the placed stories as they see fit, and they can optionally push their changes back to the original Google Doc, as long as they have Edit privileges (if it's a Shared file).

When the author makes changes to the Google Doc, InDesign shows an Out of Date icon on the frame and in the Links panel. When the designer updates the linked story, DocsFlow does a **magic merge**, feathering in the text and formatting changes from the changed file online to the placed and formatted story in the layout, without losing any of the designer's changes.

Opening the Story Editor in InDesign will reveal all the text changes made to the placed story since it was linked, from the designer and from the writer. A Note icon appears at any "conflict" (when both the designer and the editor made different changes to the same bit of text).

At any point, the designer can choose to Unlink the InDesign text frames from the Google Doc by selecting it in the Links panel and choosing Embed Link from the Links panel menu. ###



Contact Me for More Info and Help

This was fun! I'd love to hear from you. Book a free 15-minute consultation with me, no obligation, to answer your team's collaboration questions:

<https://calendly.com/senecadesign>

- Or call me at 773-669-7525 (Chicago)
- Other contact info is on the first page of this handout

Other ways to collaborate

- Did you know that two writers can **share the same Word file and edit it concurrently** — just like a Google Doc — as long as they're both using Word 365? (Files are saved to a shared folder in OneDrive that Office sets up on the fly, behind the scenes.)
- Two designers can **edit the same InDesign file concurrently** using a free script from [Automation.com](https://www.automation.com), Layout Zone
- Two artists can take turns **editing the same Photoshop or Illustrator file** from within the programs, using each program's Cloud space, and see a Version History of their changes
- Multiple reviewers can **markup the same layout in a browser window** and "have a conversation" in the comments using Acrobat's or InDesign's Share for Review
- Adobe **XD users can work on the same file** at the same time in XD's Cloud space
- Not only can users share Creative Cloud libraries with other programs (InDesign, Photoshop, Illustrator, and more) and with each other, but **CC Libraries can be added to Microsoft Word, Powerpoint, and Google Docs**, useful for dragging in images.

Incredibly Useful LINKS

I cover all the above, plus full chapters on **InCopy, DocsFlow, and WordsFlow**, in my **Collaboration for Designers and Editors** course on LinkedIn Learning:

- <http://linkedin-learning.pxf.io/amc-collab> (includes a 30-day trial)
- **EmSoftware** for WordsFlow and DocsFlow (free trials available!)
- **Download a free 7-day trial of InCopy** for your editors