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DIGITAL ASSET MANAGEMENT SYSTEMS

SPECIAL REPRINT!

MAY 2018 / ISSUE #109
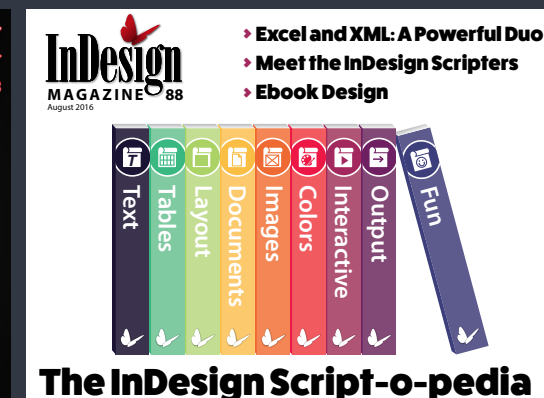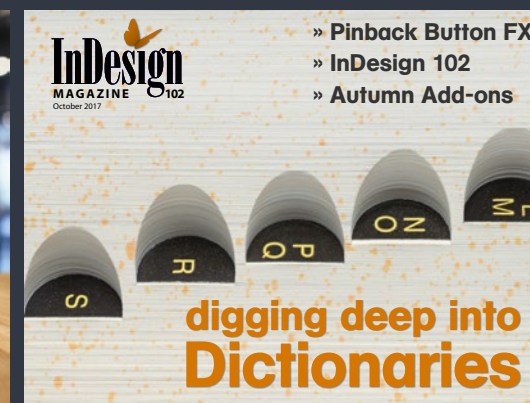
COLLABORATING THROUGH CLOUD SERVICES

BY **Conrad Chavez**

Options for InDesign workgroups

Publishing is usually a collaborative effort, but many software tools are still built as if each computer is an island. Large organizations have the resources to invest in a workgroup solution, typically custom-built and installed by a system integrator, to connect a large team of users, streamlining their workflow for InDesign and other applications. But when the investment in time or money required for a custom solution is more than a small or constantly-changing workgroup can justify, it's worth exploring simple and flexible solutions involving one or more low-cost, easily adopted cloud services.

Perhaps the most common workgroup sharing tool is also the most problematic: email. Sure, email is still a popular way to share files, because everyone is familiar with it. But sharing files through email creates several complications in a production environment. Alternatively, cloud storage services can make it easier to manage versions, preserve InDesign links, and transfer very large or numerous files that may run into file size limits for email attachments—while being almost as simple to use as email.

Cloud-based solutions come in a dizzying array of choices. And the right answer doesn't always mean the most technically advanced solution. Let's walk through some of the possibilities for working with InDesign files and the graphics you'll add to them, as well as some options for copyediting workflows.

Understanding the Basics of File Sharing With Dropbox

The most popular cloud-sharing service is also one of the easiest to use: Dropbox. You might have used a service such as Dropbox to easily transfer work between your own computer and mobile devices. But if you haven't used it to share files with others, here's a quick overview of how that works.

Dropbox functions both on your device and in a web browser. Because the web browser option is identical on both Mac and Windows, I'll focus on that option here. In a web browser (FIGURE 1), the left panel displays sections such as My Files, Sharing, File Requests
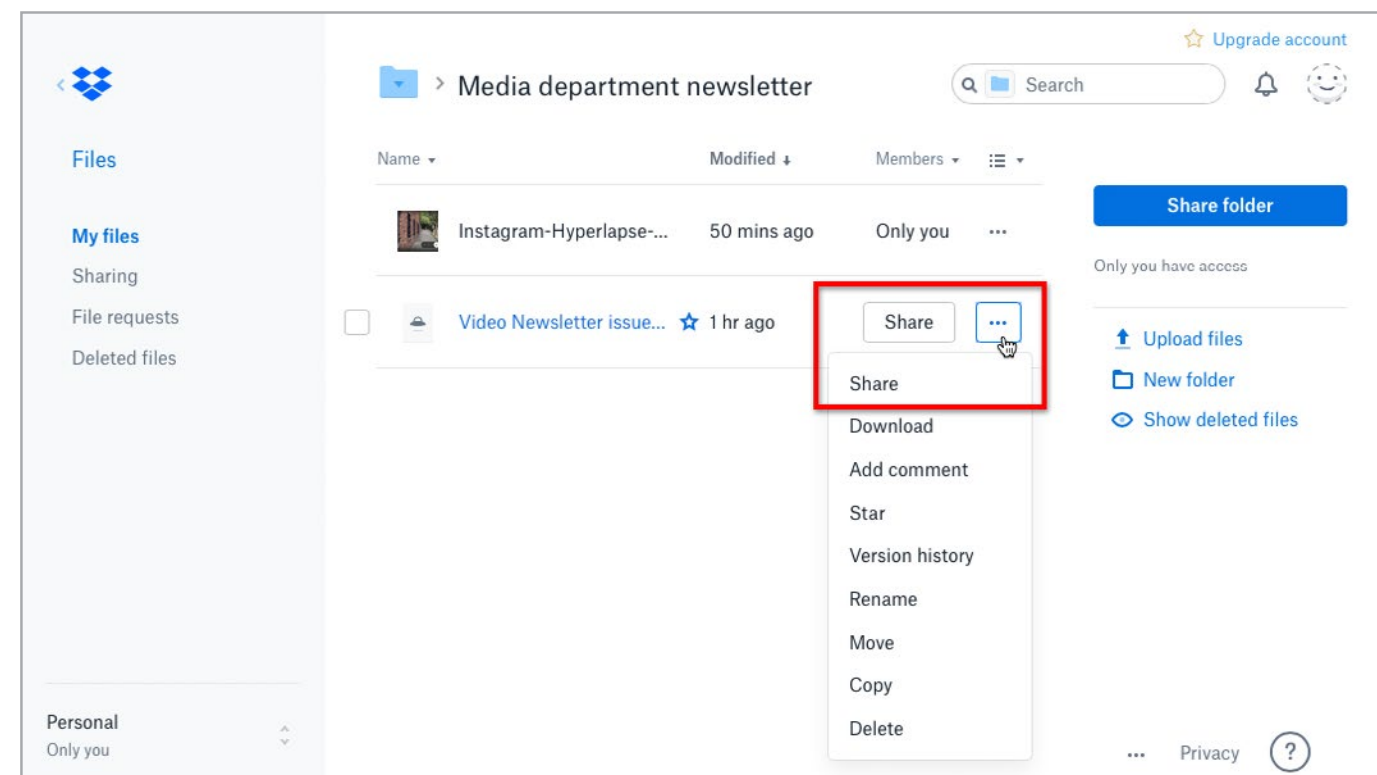
FIGURE 1. Hovering over a Dropbox item displays a Share button. Clicking the menu button reveals more options that also include Share.

(asking others to share files with you, like Sharing in reverse), and Deleted Files (restore files you've trashed). You typically start from the My Files section on the left, and then click the file or folder you want to share. In a Dropbox file view in a web browser, each item has a menu with several options. For collaboration, some of the most important options are Share, Download, Add Comment, and Version History.

The Share option (FIGURE 2) lets you send an email link to a colleague. When they click the link, Dropbox adds the file or folder to their Dropbox account so they can download or view the file or folder on their computer or mobile device. Because it's a link and not an email attachment, there's no file transfer time or email file size limit.

The Download option does what you expect: It transfers the file from the cloud server to your web browser's designated folder for downloads. The Add Comment option (FIGURE 3) lets you post a comment on Dropbox; it can also be seen by someone you sent a Share link to.

Version History (FIGURE 4, NEXT PAGE) keeps older versions of a document. If the current version contains a mistake or becomes corrupted, you can select an older version to make it the current version. The oldest version is the one initially uploaded to Dropbox; anything older than that needs to come from your own local backups.
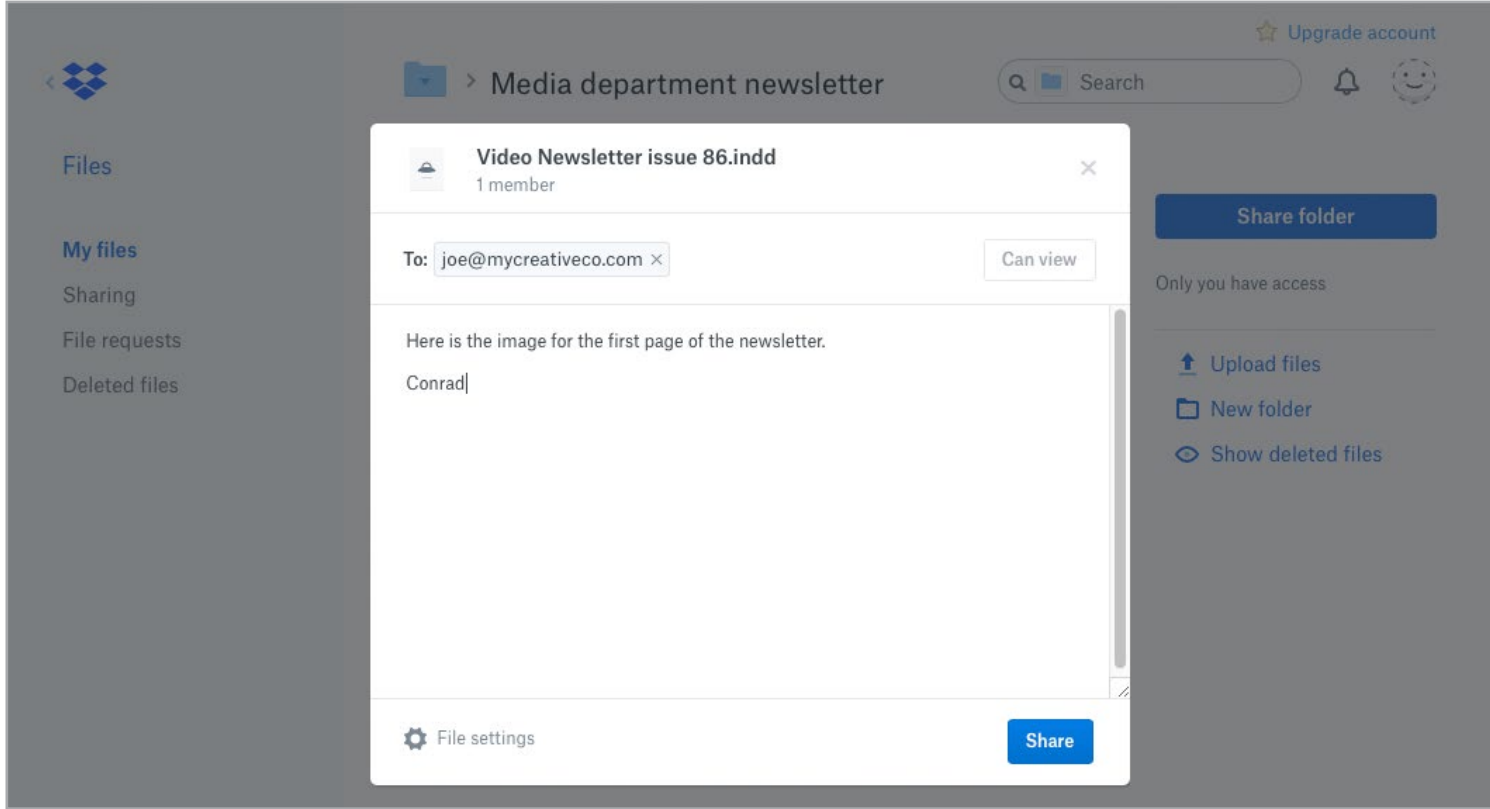
FIGURE 2. Share invites a colleague to add your selected content to their Dropbox account.
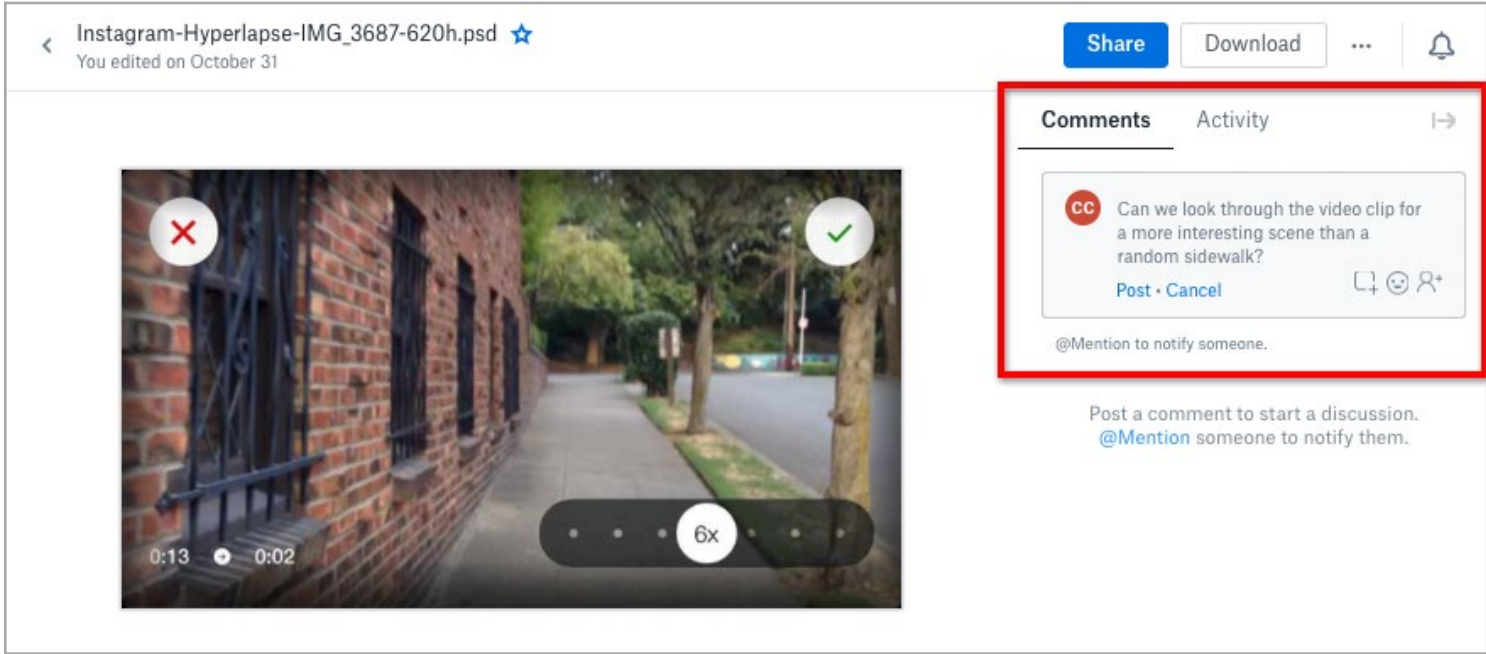
FIGURE 3. Comments can help colleagues clarify how to use or edit shared content.

The Sharing section (FIGURE 5) lets you manage the folders, files, and links that you've shared and that others have shared with you.

As I said, there are many alternatives to Dropbox, including Google Drive, Microsoft OneDrive, Apple iCloud Drive, Box.com, and Adobe Creative Cloud Files. They'll work slightly differently, but you'll typically find collaboration features in the menus that provide settings for files and folders.

If you're on the go, many of these options are also available in the mobile app versions of these services. For example, if someone needs a file and it's in your Dropbox account, you can send them a Share link from the Dropbox app on your smartphone.
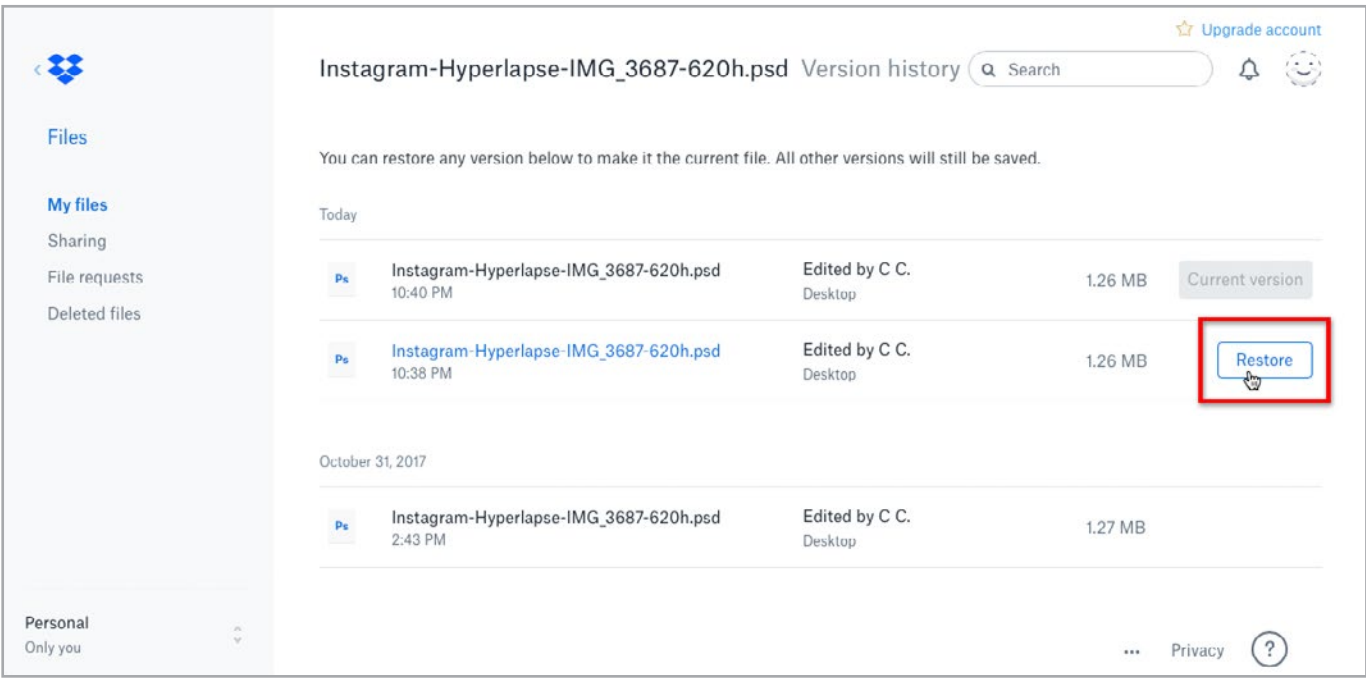

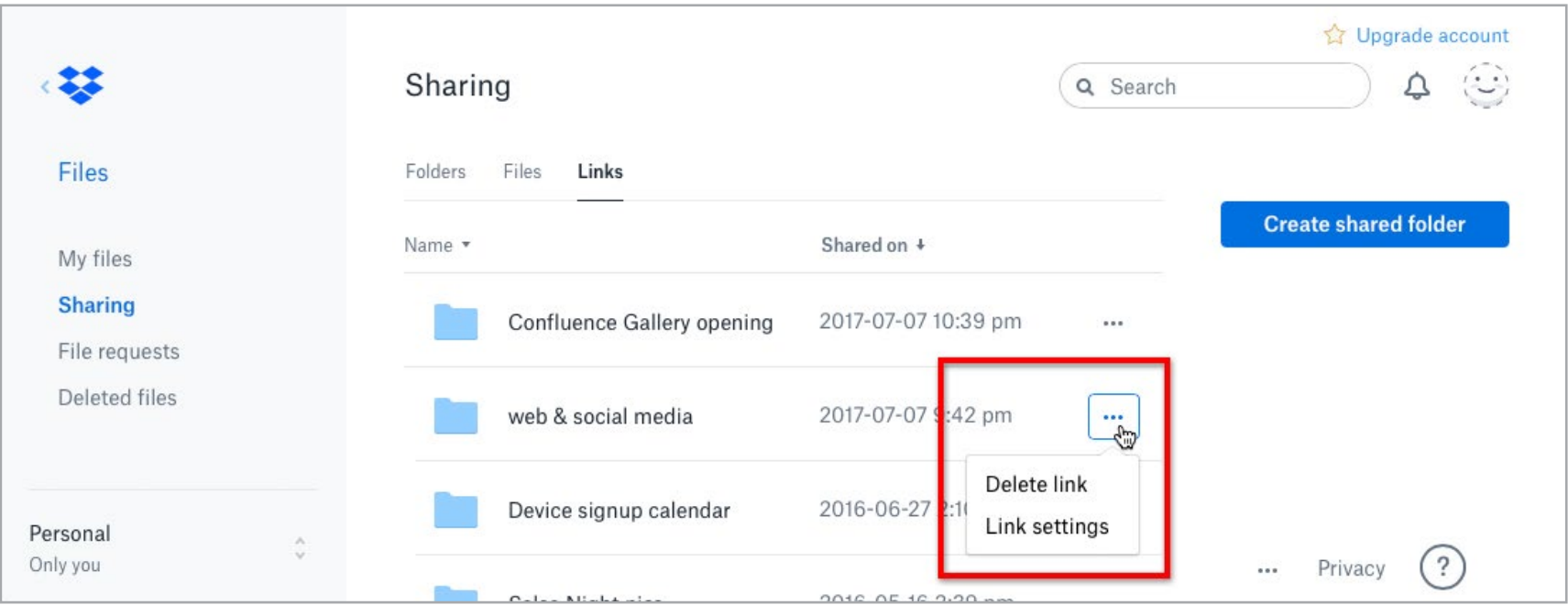FIGURE 4. Version History is like a multi-step undo command, but at the file level.

FIGURE 5. The Links tab in the Sharing section lists links you've shared, so that you can adjust permissions and other settings.

There's much more to learn about Dropbox—consider watching Keith Gilbert's excellent video series, Learning Dropbox, on Lynda.com/ LinkedIn Learning.

Using Cloud File Sharing Services with InDesign

As always, your workflow should be designed to bring content into InDesign as linked files—typically using the Place command—for maximum flexibility when text or graphics need to be updated.

But you can't use the Place command with text or graphics that you see in a web browser. So, for example, you can't place a file that you're viewing on the Dropbox website. Fortunately, if you installed the Dropbox application on your computer, it continuously synchronizes

SHARING FILES WITH SOMEONE WHO DOESN'T HAVE DROPBOX

Got a colleague who doesn't have Dropbox? You can still share files with them via hyperlinks, created with the Dropbox desktop app on your computer. Right-click the file and click Copy Dropbox Link on the Mac, or, on Windows, choose Share, and then choose Create Link. With the link copied to your clipboard, you can paste it into an email, text message, or anywhere else you share hyperlinks. When your colleagues click that link, the file or folder will open in a web browser and allow them to download the file. If you have the Professional or Business version of Dropbox, you can limit access by password-protecting these links and setting expiration dates for them. Sharing links this way doesn't foster true collaboration, but it's very handy if you just want to give a file to someone, whether or not they use Dropbox.

shared files and folders between the Dropbox cloud server and a Dropbox folder on your computer. You can place the file from that local folder into InDesign, and InDesign can maintain the link to that file as long as that copy exists on your computer.

Dropbox has a Download option; however, the Share option is preferable if you're collaborating. Because your web browser's downloads folder is typically local and accessible only to you, the Download option is useful only if you no longer want that file to be edited by others.

The other cloud file sharing services listed earlier work similarly to Dropbox. Contributors can add content through their computers, web browsers, and mobile devices, and you can place the files from your local synchronized folder. (Creative Cloud offers another important method, which I cover below.)

Avoiding version conflicts

When you share documents through a cloud service, there's potential for confusion over which version of a document is current. Two people may try to edit the same file at the same time from different locations. If the cloud service you use can't prevent multiple users from editing the same file simultaneously, a *conflicted copy* will probably result. When this happens, the version that InDesign is linked to may not be the correct version. You now have to figure out which copy has the latest changes, or if both copies have changed and need to be merged manually.

Ideally, a cloud service would lock out all other users when one is editing a document. And some cloud services offer file locking as part of a paid or premium tier,

in which case it may be worthwhile to upgrade to one of those plans to prevent conflicts. If your cloud service doesn't provide that feature, make sure your team has a procedure for letting others know when they need to stay out of a file. Some people coordinate file handling using the group chat tools in services such as Slack or Basecamp.

When you open an InDesign document on your computer, InDesign creates a lock file (**FIGURE 6**) in the same folder, using the same name as the opened file, but starting with a tilde (~) and ending with an .idlk filename extension. The lock file

Name		Date Modified
🔒 ~video newsletter i~ijakeo.idlk	✓	Today, 10:03 PM
Video Newsletter issue 86.indd	✓	Today, 5:35 PM
Instagram-Hyperlap...IMG_3687-620h.psd	✓	Today, 2:43 PM

FIGURE 6. The InDesign .idlk lock file appears when an InDesign file is open. The green icons indicate Dropbox sync status for those local files.

is supposed to prevent multiple users from opening the same InDesign file. Unfortunately, it doesn't always work when the InDesign file is stored on a cloud service, which of course may result in conflicted copies. If your own testing shows that this is a problem on the service you're using, you must find another way to coordinate your workgroup to avoid editing conflicts.

The version history feature mentioned earlier can help your workgroup recover from mistakes related to a version conflict, or when a file is accidentally deleted.

Creative Cloud Options for Collaboration

Because all InDesign CC users have a Creative Cloud subscription, it's worth looking at the

ways that Creative Cloud can store and share content.

Creative Cloud Files is similar to Dropbox-type services in how it works and in being able to store, retrieve, and share files on desktop and mobile devices. But Creative Cloud Files offers some unique advantages. For example, Photoshop files saved in the Cloud offer an Extract button that lets you view document fonts, colors, styles, layers, and gradients from within your web browser, and you can download those components individually. When no documents are open in InDesign, you can open Creative Cloud files directly from the CC Files section of the Start screen.

However, Creative Cloud Files storage isn't perfect. If multiple users open an InDesign file stored in Creative Cloud Files, the InDesign lock file conflict

mentioned earlier may occur, so workgroup coordination remains essential.

Earlier web versions of Creative Cloud Files supported features such as version control, and could show you the color themes and fonts used in an InDesign document. At the time this article was published, the Creative Cloud Files website was undergoing a major redesign, and some features are not currently implemented. Keep an eye on the web version of Creative Cloud Files to see what Adobe adds as the redesign progresses.

You can also share content through Creative Cloud Libraries. Unlike Dropbox-type services, Creative Cloud Libraries operate at the level of objects, not entire files. This makes Creative Cloud Libraries a great way to share color swatches, text, object

styles, objects and other artwork, and Photoshop layers or images (**FIGURE 7**). For more information about sharing with Creative Cloud Libraries, see Issue #83.

Collaborating on Copyedits

The cloud sharing services mentioned above also work with files that contain text copy (such as Microsoft Word files), and
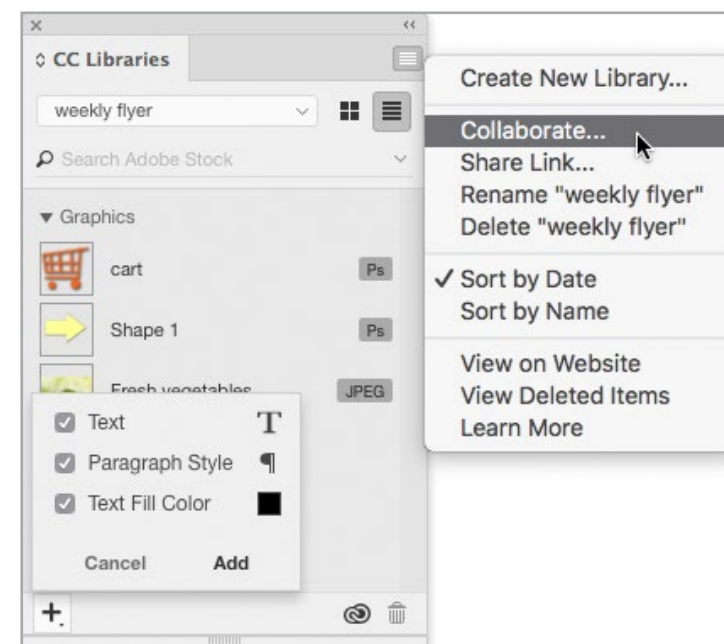
FIGURE 7. Creative Cloud Libraries are a way to share objects, styles, and components with collaborators.

multiple writers and editors can create and edit these files before they're placed into InDesign. However, once the file is placed into InDesign, it becomes more challenging to collaborate on text. If your workgroup requires this kind of ongoing editorial collaboration, you may need one of the following solutions.

InCopy is a great solution... sometimes

If you need a way to coordinate the editorial workflow of an InDesign publication and you're familiar with Adobe InCopy, you might naturally gravitate to a solution built around InDesign and InCopy. InDesign stories can be assigned to contributors who can use InCopy to see how well their writing fits the layout, and their work flows right back into the InDesign document. Editors don't need the full Creative

Cloud subscription; a single-app subscription to InCopy CC is $4.99/month per seat.

The InCopy workflow works best when the InDesign file and its shared text content (linked InCopy files) are on a local file server to which all InDesign and InCopy users have read/write access. As long as everyone works directly off the server, InDesign and InCopy can easily track the "check-out" status (locked or available) of each assignment in real time, preventing version conflicts. Also, it helps for everyone in the workgroup to be a regular contributor, so they can be trained to be competent and efficient in using InCopy.

The InCopy workflow works almost as well with Dropbox or Google Drive. If you store the InDesign file and its linked InCopy stories in a

locally-synced folder from either of these cloud services, and share that folder (collaborate) with remote InCopy users who have installed the Dropbox or Google Drive software on their computers as well, you can set up a remote workflow for everyone, without needing a local file server. All users will need some training in best practices, such as never copying the files to a location outside of the shared folder; but you'd need to educate them with the same cautions if they're working on a local file server. Also, while both of these services do fast background syncing of the check-out status of stories in a layout, neither syncs the lock status of the InDesign layout itself. Designers will need to be careful about opening layouts that someone else might already have open to avoid the "conflicting

THIRD-PARTY EDITORIAL COLLABORATION

While some groups collaborate online using the current version of Microsoft Word, many organizations are building workflows around Google Docs because of its accessibility and simplicity. Of course, there's a gap when trying to integrate InDesign with a Google Docs workflow, because InDesign can't natively place a Google Docs file online or through Google Drive.

Fortunately, this workflow gap has been filled in by an independent InDesign developer: Em Software comes to the rescue. They make a plug-in called DocsFlow, which adds Google Docs support to InDesign through commands it adds in a **File > DocsFlow** submenu. Choose **File > DocsFlow > Place from Google Docs**, sign in to your Google account, and you can then place a Google Doc directly from your Google Drive cloud storage using a standard InDesign link. The Pro version includes two more valuable features: When you edit a placed Google Docs story in an InDesign layout, you can sync those changes back out to the linked Google Docs file in the cloud, and you can also place a Google Sheets spreadsheet.

Em Software also makes a similar plug-in for Microsoft Word and Excel files called WordsFlow, which lets you link to Word files so that you can continue to make edits and formatting changes in both Word and InDesign (and it magically merges them). See David Blatner's review of DocsFlow in Issue #48 for more information.
If there's a hole in your collaborative cloud-based InDesign workflow, it's worth opening InDesign and choosing **Window > Find Extensions on Exchange** to see if there are InDesign extensions that can fill that gap.
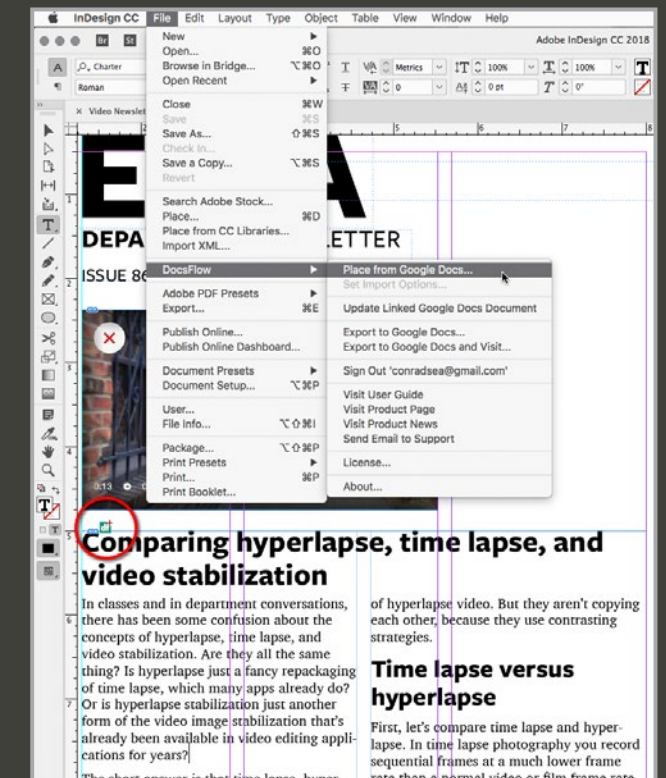
When a Google Docs file is placed in a selected InDesign story, the text frames display a DocsFlow badge.

file" problem. Luckily, they just need to check for the existence of the telltale .idlk file in the same folder as the InDesign file. If it's there, someone has the layout open in InDesign, so move on. If it's not there, the layout is safe to open.

None of the other cloud services mentioned thus far, not even Adobe's own Creative Cloud Files, supports the critical check-out status syncing of the shared stories in an InDesign/InCopy workflow. But if you know you'll never have more than one person trying to edit the same stories at once—such as a designer and an editor who "take turns" with a publication—then CC Files, Box, and other cloud services that sync a local folder with a user's cloud account will work for you.

Keep in mind that occasional contributors are far more likely to be familiar with Microsoft Word or Google Docs than with InCopy, so if a workgroup frequently includes a changing cast of free-lancers or occasional contribu-tors such as students, it may not be practical to expect them to become proficient with InCopy for just one or two short projects.

Connecting the Dots

Given the wide spectrum of options for cloud collaboration, and the need to ensure that InDesign can operate consis-tently, be sure to thoroughly test any workflow that you design around a consumer cloud service. Give your workgroup a reliable way to avoid version conflicts, recognize that a work-group's familiarity with certain tools may be a strong factor in the solution, and maintain backups rigorously.

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