



Smart Connection Pro v2

featuring Adobe InCopy

User Guide



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WoodWing Smart Connection Pro for InDesign and InCopy User Guide Windows and Macintosh.

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Production Note

This book was created electronically using Adobe InDesign, Adobe InCopy, WoodWing Smart Layout, and WoodWing Smart Connection Pro..

Smart Connection Pro User Guide

Intro

Smart Connection Pro offers an integrated workflow solution with Adobe InDesign® and InCopy. Instead of passing around a paginated document for copy fitting you can now send a story for editing while the designing of the document can continue. You can even send different stories from one page to separate editors, all at the same time.

In the past, editors could either work with a heavy mainstream editor sending stories back and forth to fit to the layout, or send paginated files to editors giving them the burden of a complex layout application. With Smart Connection Pro editors can now profit from the InCopy editor. Smart Connection Pro allows editing stories in parallel with the design of the page offering the unique ability to write stories to fit the layout. Besides layout driven workflows Smart Connection Pro also supports copy driven workflows.

Smart Connection Pro can use any file server to share your files. Instead of browsing endlessly through folders, Smart Connection Pro offers a database-like user interface, using your concepts like publication, issue, section and basket.

SDK

For System Integrators, an SDK is available that offers complete control over Smart Connection Pro's behavior. The SDK allows a seamless integration into existing systems and databases.

A Smart Publishing Team

Smart Connection Pro in combination with WoodWing's Smart Styles and Smart Layout plug-ins form a Smart Publishing Team. For copy driven stories, Smart Styles can be used to quickly format the complete story in one single action.

Smart Layout can be used to easily create layouts for new articles consisting of multiple unlinked stories. These Smart Layout items can be sent to InCopy as one unit without the need to select all elements one by one.

For more info on Smart Styles and Smart Layout, visit <http://www.WoodWing.com>

Support

If you need support with the installation, usage or configuration of Smart Connection Pro please visit the WoodWing site www.WoodWing.com/support which contains a FAQ (Frequently Asked Questions) and further directions how to submit questions.

Installation

Requirements

- Adobe InDesign v2.01
- Adobe InCopy v2.0
- Operating System
 - Apple: Mac OS9.x or Mac OS X
 - MS-Windows: 98SE, ME, NT4, 2000 or XP.
- Hardware: same requirements and recommendations as standard InDesign and InCopy. See www.Adobe.com for details.

Installing Windows version

Installing Adobe InCopy 2.0

Use the following procedure to install InCopy from the Smart Connection Application CD. You cannot run InCopy from the CD; you must install the program files onto your hard disk.

If you are upgrading from a previous version of InCopy, the installer creates a new folder for the InCopy 2.0 files. Your current InCopy files are not affected.

Note: After you install InCopy, remember that you can install additional products, such as PostScript printer drivers and OpenType fonts, from the Smart Connection Application CD.

To install InCopy 2.0 in Windows:

- Insert the *Smart Connection Application CD* in your CD-ROM drive.
- Do one of the following:
 - If the CD launches automatically, use the buttons on screen to start the InCopy installer.
 - If the CD does not launch automatically, double-click the *My Computer* icon on the desktop, double-click the CD-ROM icon, and double-click *Setup.exe* in the InCopy folder.
- Click *Next*.
- Choose the language version of InCopy you want to install, and click *Next*.
- Choose the language that you would prefer to view the *License Agreement*, and click *Next*.
- Read the *End-user License Agreement*, and click *Accept*.
- Type your name and company information, and type the serial number. Click *Next*.
- Make sure the installation information is accurate, and then click *Yes*.
- If you're upgrading from a previous version of InCopy, the installer tries to locate the previous version. If it cannot find the previous version, an alert message appears. Do one of the following:
 - Select *Find the InCopy Application Folder*, and click *Next*. Locate the program file of the previous version of InCopy, and then click *OK*.
 - Select *Enter Serial Number from Previous Version*, and click *Next*. Type the serial number of the previous version of InCopy, and click *Next*.
- Specify the type of installation you want:
 - To install all components, choose *Typical*.
 - To install only particular components, choose *Custom*. You can later select the desired components. When you select a component, its description appears in the dialog box.
 - If you want to change the installation location, click *Browse*, and then specify a destination folder.
- Click *Next*.
- Click *Install*, and follow the on-screen instructions to complete the installation of InCopy.

After you install Adobe InCopy software, please refer to the “ReadMe” file contained in the Adobe InCopy 2.0 folder on your hard drive. The “ReadMe” file contains last-minute information that you may want to print and keep with your documentation for future reference.

Installing Smart Connection Pro for Windows:

The following steps have to be executed separately for InDesign and InCopy:

- Start installation program *Smart Connection Pro.exe*.
- Read the license agreement thoroughly and continue after agreeing with it.
- Choose to install Smart Connection Pro for InCopy or InDesign.
- The setup will show the path to InDesign or InCopy where Smart Connection Pro will be installed. In case you have multiple InDesign or InCopy versions installed on your machine you might want to select a different InDesign or InCopy directory. You need to select the directory containing the InDesign.exe or InCopy.exe application.
- Select the components to install:
 - Smart Connection Pro Plug-ins – the software.
 - Documentation – this document.
 - Configuration plug-in - software for configuration of workspace.
- In case you selected to install documentation you will be prompted for the installation location. Default location is a WoodWing folder within the InDesign or InCopy folder.
- Now setup will install the files.
- When you start InDesign or InCopy you will be prompted to register, see section *Authorization and registration* below.

Installing Macintosh version

Installing Adobe InCopy 2.0

Use the following procedure to install InCopy from the Smart Connection Application CD. You cannot run InCopy from the CD; you must install the program files onto your hard disk.

If you are upgrading from a previous version of InCopy, the installer creates a new folder for the InCopy 2.0 files. Your current InCopy files are not affected.

Note: After you install InCopy, remember that you can install additional products, such as PostScript printer drivers and OpenType fonts, from the Smart Connection Application CD.

To install InCopy 2.0 on a Mac OS:

- Insert the Smart Connection Application CD in your CD-ROM drive.
- Double-click the *Smart Connection CD* icon on the desktop, and double-click the *Install Adobe InCopy* icon.
- Choose the language you prefer to work in, and click *Continue*. (The selected language determines which dictionary files will be installed, and the default page sizes and units of measurement.)
- Read the *End-user License Agreement* (you can select a different language from the pop-up menu), and click *Accept*.
- Type your name and company information; type the serial number, and then click *Next*.
- Make sure the installation information is accurate, and then click *Install Now*.
- If you’re upgrading from a previous version of InCopy, the installer tries to locate the previous version. If it cannot find the previous version, an alert message appears. Do one of the following:
 - Select *Find the InCopy Application* and click *Continue*. Locate the program file of the previous version of InCopy, and then click *Open*.
 - Select *Enter Serial Number from Previous Version*, and click *Continue*. Type the serial number of the previous version of InCopy, and click *Next*.
- Specify the type of installation you want:
 - To use the standard installation, choose *Easy Install* from the pop-up menu.

- To install only particular components, choose *Custom Install*, and then select the desired components. For a description of any component that can be installed, click the “I” button to the right of the component.
- If you want to change the installation location, choose *Select Folder* from the pop-up menu, specify a folder, and then choose *Choose*.
- Click *Install*, and then follow the on-screen instructions to complete the installation.

After you install Adobe InCopy software, please refer to the “ReadMe” file contained in the Adobe InCopy 2.0 folder on your hard drive. The “ReadMe” file contains last-minute information that you may want to print and keep with your documentation for future reference.

Installing Smart Connection Pro for Macintosh:

The following steps have to be executed separately for InDesign and InCopy:

- Start installation program *Smart Connection Pro Installer*.
- Read the license agreement and continue after agreeing with it.
- Choose to install Smart Connection Pro for InCopy or InDesign. You could also select if you want to install the documentation (this document) and/or the Configuration plug-in (to configure your workspace).
- In case you select to install documentation you will be prompted for the location to install this into. Default location is a WoodWing folder within the InDesign or InCopy folder.
- The setup will show the path to InDesign or InCopy where Smart Connection Pro will be installed. In case you have multiple InDesign or InCopy versions installed on your machine, a list will be shown with all InDesign or InCopy installations that have been found.
- Now setup will install the files.
- When you start InDesign or InCopy you will be prompted to register, see section *Authorization and registration* below.

Authorization and registration

After installation you need to authorize your copy of Smart Connection Pro within 30 days. After this demo period Smart Connection Pro will cease working. In order to authorize your copy you need to purchase a valid license. With this purchase you will receive a serial number needed for authorization.

During the 30-day demo period Smart Connection Pro will prompt regularly at startup to authorize your license. The authorization process can be started from the WoodWing About dialog (Windows: menu *Help | About WoodWing Plug-ins...*, MacOS9: menu *Apple | About WoodWing Plug-ins...*, MacOSX: *InDesign | About WoodWing Plug-ins...* or *InCopy | About WoodWing Plug-ins...*).

The WoodWing about dialog shows all WoodWing products installed with the authorization status (demo, authorized or expired). From this list select *Smart Connection Pro* and press the *Authorize* button.

Note: in case you have bought Smart Connection Pro as part of a bundle with other WoodWing product(s), you can select all products from the bundle.

For authorization the plug-in will make a internet connection with WoodWing's authorization server. Only information as shown by the authorization dialog will be transmitted. In case you don't have an internet connec-



tion or you absolutely don't want to authorize via the internet you can select the *I don't have access...* checkbox to authorize via email or fax.

Next you will be prompted to enter your serial number and you can choose whether you want to register your copy. Note that only registered users have access to free support and upgrades.

The following screen prompts you for your details for registration. After this the plug-in is ready to connect to the internet. In case you're using a proxy server you can specify the proxy server. Make sure you have an internet connection and press *Next* to authorize your copy.

Client Configuration

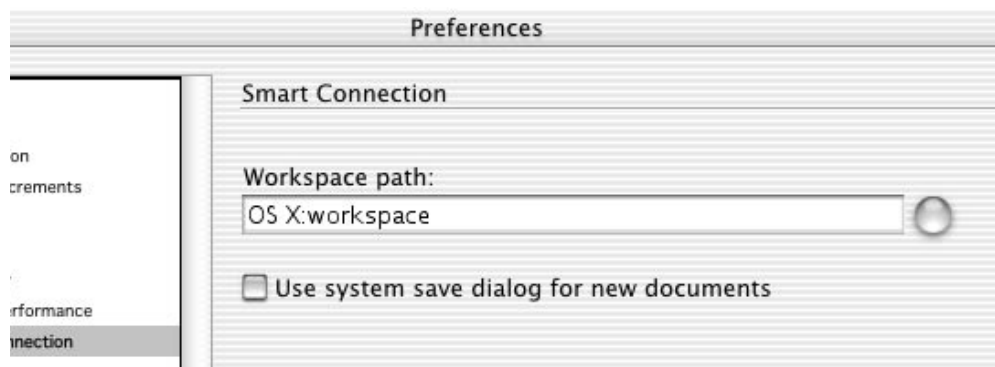
Intro

Before using Smart Connection Pro, you first need configure the location of your workspace. The workspace is the location used to share files with your co-workers. Before you can use a workspace it has to be setup by your system administrator, see section System Configuration for details on this.

User configuration

The user preferences can be found in the InDesign preferences (Windows/MacOS9: *Edit | Preferences | Smart Connection...*, MacOSX: *InDesign | Preferences | Smart Connection...* or *InCopy | Preferences | Smart Connection...*).

Workspace path: The most important preference of all Smart Connection Pro preferences. Browse or enter the complete path to the workspace in this edit box.



Notes:

- On the Macintosh you cannot use the root folder of a volume as the workspace. Always use a folder on the volume as the workspace path.

Use system save dialog for new documents: When this preference is unchecked the save of the article will be handled by Smart Connection Pro. You will directly get the Smart Connection Pro Save Dialog when saving a new created document or story for the first time. When this preference is checked, you will get the system save dialog.

Note: It is possible to save documents in other folders by using the Smart Connection Pro Save Dialog. You should select the *Browse...* button.

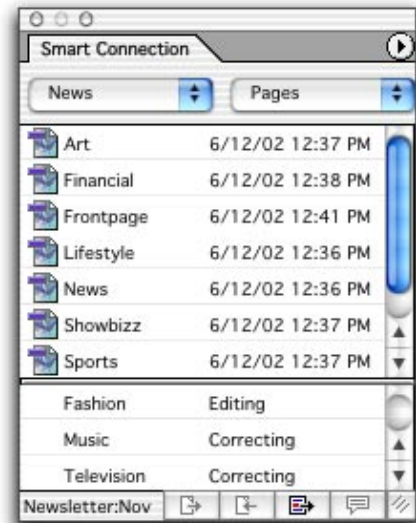
Smart Connection palette

Intro

Smart Connection Pro adds a palette to InDesign and InCopy, the Smart Connection palette. This palette consists of four parts: the upper half with a view on the workspace, the lower half with a list of assigned stories (InDesign) or opened stories (InCopy), a button bar and a menu.

View on the workspace

The upper half of the Smart Connection palette is a view on the workspace. At the top there are two drop down boxes. The left drop down contains a list of all sections of the current issue and the right drop down box contains a list of all baskets. The list under the drop down boxes gives you a view on the files in the selected basket of the selected section. By double clicking or drag and drop you have immediate access to your documents and materials.



List of assigned stories (InDesign only)

The lower half of the Smart Connection palette in InDesign gives you an overview of the stories of the current document that have been assigned. In this list you will see the name and the current status (basket) of the stories.

There are four icons that can be shown in front of the name of the story:



The *Checked Out* icon indicates that the InDesign user has checked out the story and that the user can change the contents of that story.



The *Updated* icon indicates that an InCopy user has made changes to the story.



The *Ready For Page* icon indicates that the story is in the ready-for-page basket.



The *Lost Link* icon indicates that the link to the story has been lost.

The list of assigned stories has a context menu to perform actions on the files in the list.

List of opened stories (InCopy only)

In InCopy the lower half of the Smart Connection palette contains a list of opened stories. All stories are listed with their name and basket. The active story, the one currently shown, is selected in the list. To switch the active story, just select another story from the list of opened stories.

The list of opened stories has a context menu to perform actions on the files in the list.

Menu and button bar

The Menu and button bar of the Smart Connection palette contain several actions. These actions will be explained throughout the next section.

Using Smart Connection Pro

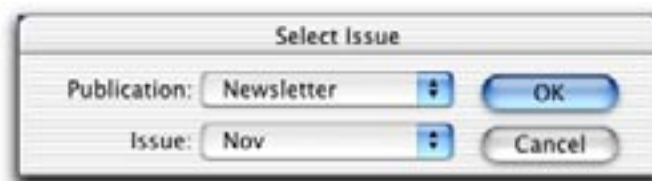
Define workspace path

The first thing you have to do to be able to use Smart Connection Pro is to configure the path to the workspace. You can do this in the preferences dialog (Windows/MacOS9: *Edit | Preferences | Smart Connection...*, MacOSX: *InDesign | Preferences | Smart Connection...* or *InCopy | Preferences | Smart Connection...*). You have to enter the path to the workspace without the last separator in the *Workspace path* edit box (see the *Client Configuration* section) or you can browse to the right folder.

Select issue

Because Smart Connection Pro is a publication based solution, you start by selecting the issue to work on. After doing that the Smart Connection palette will show the right sections and baskets and their contents.

You can select the right issue by selecting the *Select Issue...* menu entry of the Smart Connection palette. The following dialog will appear:



After selecting the right publication (if available) and issue, the view on the workspace will be updated.

Note: If the drop down boxes of the *Select Issue* dialog are empty, you should check if you have defined the right path to your workspace and you should be sure that there are issues generated (see *System Configuration* chapter).

Open a file

There are different ways to open a file from the workspace:

- Double click on a file in the basket list of the workspace view.
- Select a file in the basket list of the workspace view and select *Open* from the context menu of the list.

After doing one of these actions InDesign or InCopy will open the file. InCopy will first try to open the file including design information about the story and the other items of the page. If that fails, the file will be opened without design information.

If possible the file will be checked out as well to make sure it cannot be used by another user at the same time. After closing the file, it will be automatically checked in and it is available for other users.

Open a story without design information (InCopy only)

It is possible to open a file without design information within InCopy. If you do this, you are not able to write your text to fit.

To open a story without design information you have to select the file and the *Open without Design* menu entry from the Smart Connection palette menu.

Place a file

You can place a file out of the basket list of the workspace view in two different ways:

- Double click of the file. This way you can also open libraries (both Object and Smart Styles libraries)
- Select a file in the list and drag and drop it on the page. Within InCopy it is only possible to place textfiles.
- Select a file in the list and select *Place File* from the context menu of the list.

Notes:

- To prevent mistakes, Smart Connection Pro does not allow to place InCopy stories that have been assigned by InDesign. In case you need to place such a document anyway, you can open the file with InCopy and use *Save As* to store it as a so-called stand alone copy with a new name that can be placed within InDesign.
- It is not possible to place standalone InCopy files that contain multiple stories. In that case only the first story of the InCopy file will be placed.

Assign / check in one story (InDesign Only)

To allow an editor to work on a story you need to *Assign* a story. Assigning a story will create an InCopy file and maintain a link to this file. In this way editors and designers can work at the same page at the same time.

There are several possibilities to send a story to InCopy:

- Select a text frame and press the *Assign / Check In* button of the button bar of the Smart Connection palette.
- Select a text frame and select the *Assign / Check In Stories...* menu item from the Smart Connection palette menu.
- Select a text frame and select the *Assign / Check In Stories...* menu item from the *File | Smart Connection* menu.

After doing one of these actions the *Assign* dialog will appear. You can select the basket the story must be assigned to and you can enter a name for the story. After you clicked *OK* the story will be assigned. The story will appear in the list of assigned stories at the lower half of the Smart Connection palette. After sending the story it is no longer editable within InDesign, but you can still change the geometry of the text frame.



'Non editable' sign

Note 1: Assigned stories are marked with a 'non editable' sign. This sign is NOT shown when the frame edges are hidden (*View | Show/Hide Frame Edges*).

Note 2: For Smart Layout users: It is possible to assign the elements of a Smart Layout one after the other to different InCopy files. In order to do that, you first have to assign all items inside a Smart Layout, before assigning the Smart Layout itself. It is also possible to assign only the Smart Layout item if you place the text cursor into its text.

Assign / check in multiple stories (InDesign only)

You can also assign multiple stories as one file by selecting multiple text frames using one of the same possibilities as with assigning one story to InCopy.

It is not possible with InDesign to select multiple text frames on different spreads. To assign multiple stories on different spread, use the *assign all stories on a layer at once* feature: make sure that the right layer is the active layer and select the *Assign / Check In Layer Stories...* menu item from the palette

menu. After doing this, the *Assign* dialog will appear and you can enter the right basket and name for the InCopy file.

Check out stories (InDesign only)

After assigning a story you can no longer edit the story because the edit access has been released. In case you need to be able to make text edits again you need to check-out the story. By checking out a story you refresh the story and get edit access again. When an editor is working on the story within InCopy checkout will fail. In most cases you will do this when the story is in *the ready-for-page* basket. In that case the story has a ready icon in the *Assigned Stories* list at the lower half of the Smart Connection palette.

You can check out a story by doing the following steps:

- Select one or more text frames of assigned stories on the page or select the right stories in the *Assigned Stories* list of the Smart Connection palette.
- Press the *Check Out* button, or select *Check Out Stories* from the context menu of the *Assigned Stories* list, or select *Check Out Stories* from the palette menu, or select *Check Out Stories* from the *File | Smart Connection* menu.
- The story will be updated from the file and you can edit the story again with InDesign. The InCopy user is not able to edit the story anymore to ensure one single copy of the story.

Detach stories (InDesign only)

There can be situations you want to detach the InCopy file from your InDesign story, for this the Detach command is used. Note this will remove the link without updating the story on the InDesign page.

After detaching the file will be made stand alone to allow placement in another InDesign document.

You can detach stories by doing the following:

- Select one or more text frames of assigned stories on the page or select the right stories in the *Assigned Stories* list of the Smart Connection palette.
- Select the *Detach stories* menu item from the Smart Connection palette menu or select *Detach stories* from the *File | Smart Connection* menu.

After Detach the story will not be refreshed and you can edit the story again.

Refresh stories (InDesign only)

It is possible to refresh the content of a story without checking it out. You can even do this when an editor is working on the story within InCopy getting the last save state of the story.

You can refresh the content of stories by doing the following:

- Select one or more text frames of assigned stories on the page or select the right stories in the *Assigned Stories* list of the Smart Connection Palette.
- Select the *Refresh stories* menu item from the Smart Connection palette menu or select *Refresh stories* from the *File | Smart Connection* menu or select *Refresh Stories* from the context menu of the *Assigned Stories* list.
- The stories will be refreshed.

Send design update (InDesign only)

If you have assigned stories and you have made some changes to the stories geometry, you can send these design updates to all assigned stories. In this way all editors can get an update for the story they are working on.

To send a design update, press the *Send Design Update* button of the button bar, or select the *Send Design Update* menu item from the context menu of the *Assigned Stories* list, or select the *Send Design Update* menu item from the *File | Smart Connection* menu.

After doing one of these actions, the InDesign file will be saved and the editor who is working on the story will get a message that the design has changed.

Receive design update (InCopy only)

If you have opened a story in InCopy for which a design update is available, you will get a message that there is an update available.

You can receive the design update, without changing the contents of the stories you are editing, by pressing the *Update Design* button on the button bar of the Smart Connection palette, or select *Update Design* menu entry from the menu of the Smart Connection palette.

After doing one of these the geometry changes will be applied.

Send current document/story to other basket

You can send the current document or story you are working on to another basket of your workflow. You can do this by doing the following:

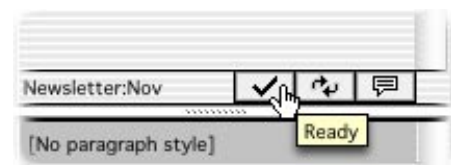
- Select the *Send Document to...* menu entry of the Smart Connection palette or select the *Send Document to...* menu entry of the context menu of the *Open stories* list (InCopy only).
- The *Send To* dialog appears and you can select the target basket.
- After clicking *OK* the document will be closed and will be sent to the target basket.

Note: In InDesign you can also use the *Send Stories To...* menu item of the context menu of the *Assigned Stories* list to send a story to another basket.

Send story to next basket (Ready) (InCopy only)

If a flow is defined for your publication (see the *Configuration* section), it is possible within InCopy to send the current story directly to the next basket (status of your workflow), without knowing which basket it is. To do this, press the *Ready* button of the button bar, or select *Ready* from the context menu of the *Open Stories* list, or select *Ready* from the Smart Connection palette menu.

After doing this, the current story will be saved, closed and sent to the next basket in the workflow.



Save document or story to workspace

If you create a new document or story, you can easily save it to the right folder within your workspace. By choosing *File-Save* or *File-Save As* for existing documents. The *Save Document To* dialog will appear and you can select the right publication, issue, section and basket and you can enter a name for the document or story.

Note: this option can only be used if the 'Use system save dialog for new documents' configuration option has been switched *off*. In case this option is switched on you need to use the *Save Document To...* menu item from the palette menu.

Send Message

The designer of a page can send a message to the editor of a story on that page and vice versa. This way the designer and editor can easily communicate with each other.

You can send a message by doing the following steps:

- For InDesign only: select the stories in the *Assigned Stories* list of the palette.
- Press the *Send Message* button of the button bar or select the *Send Message...* menu entry from the palette or select the *Send Message...* menu entry of the context menu of the *Assigned Stories* (InDesign) or *Open Stories* (InCopy) list.
- The *Send Message* dialog will appear and you can enter a message.
- After clicking *OK* the message will be sent. The receiver of the message will receive a message box with the message.

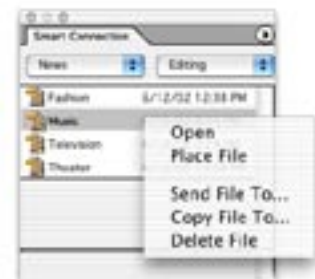


Send files throughout the workspace

You can send files in the workspace to other baskets without opening them. To do this:

- Select the file(s) in the workspace view.
- Select the *Send File...* menu item of the context menu of the workspace view.
- The *Send To* dialog appears and you can select the new location.

Note: It is only possible to send files that are not in use by another user.



Copy files within the workspace

You can copy files within the workspace. To do this, you have to do the following steps:

- Select the file that must be copied in the workspace view.
- Select the *Copy File..* menu item of the context menu of the workspace view.
- The *Copy To* dialog appears and you can select the new location and name.

Delete files from the workspace

It is possible to delete files from the workspace. To do this:

- Select the file in the workspace view that must be deleted.
- Select *Delete File* from the context menu of the workspace view.
- The selected file will be deleted.

Note: It is only possible to delete files that are not in use by another user.

Caveats and tricks

- If you use the system save dialog to save your new documents and you want Smart Connection Pro to recognize your files correctly, it is recommended to give the InCopy files that are assigned the extension *.incd* and InDesign files the extension *.indd*.

Versions

The version functionality will generate versions of the stories (InCopy files) in a folder called *_versions*. This folder is stored at the same level within the workspace as the baskets. The *_versions* folder is not visible in the Smart Connection palette.

A version will be generated when stories are sent to another basket or when the story is checked out by the InDesign user. The versions are stored under their own name plus a unique increasing number.

Element Label palette

Usage (InDesign only)

When working with multiple stories, the *Element Label* palette offers a convenient way to label the stories with a label that identifies each story.

With InDesign Element Labels can be assigned with the Element Label palette that can be shown/hidden via *Window | Element Label*.

When new text or image frames are created they will all have a default Element Label, so only exceptions to the default have to be applied manually.

Linked text frames are treated as one text frame for labels: setting the label for one linked text frame also sets the label for all other frames linked to this frame.

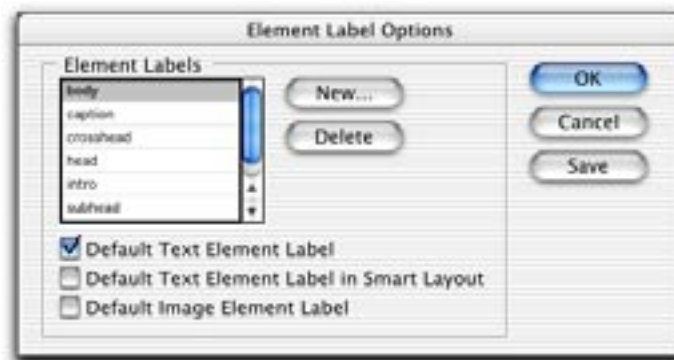
Element Labels can be removed from a text or image frame by re-selecting its assigned Element Label in the Element Label palette.

For more information about customizing these labels, see chapter *Configuration* below.



Configuration (InDesign only)

The list of *Element Labels* shown in the *Element Label* palette can be configured within InDesign via the *Element Label Options* dialog, accessible through the Edit menu. In this dialog you can add and remove Element Labels and specify three defaults: a default for text elements not in a Smart Layout item, a default for text elements inside a Smart Layout item and a default for image elements. Typically the first default is set to *body*, the second default to *head* and the third default has no value. When WoodWing Smart Layout plug-in is not installed, the default for text elements inside a Smart Layout item cannot be specified. For Smart Connection Pro the image label has no meaning.



The definition of Element Labels is stored globally (i.e. not per document) in a file called *ElementTags.xml* within the *Plug-ins\WoodWing* sub-folder within the InDesign application folder. In case the *ElementTags.xml* file does not exist, a default file will be created automatically. You can copy the *ElementTags.xml* file to other InDesign machines if desired.

Note: Even when your WoodWing plug-ins are in a different folder, the configuration file is still saved in the *plug-ins\WoodWing* folder.

Note for Smart Layout users: The Element Label plug-ins are shared with Smart Layout.

System Configuration

Intro

Before using Smart Connection Pro, you first have to configure your workspace. Before being able to do this you need to connect to a workspace folder that acts as the root folder of your publication tree. Connecting to a workspace folder is explain in previous section *User Configuration*.

Workspace configuration

Smart Connection Pro stores information about your publication structure and thus has knowledge about your publications, issues, sections and baskets. Smart Connection Pro can also support flat structures without publications and/or sections, e.g. you can also use Smart Connection Pro for structures with folders for customers, projects and baskets.

Configuration dialog

With the *Configuration* dialog (*File | Smart Connection | Configuration...*) you can configure your workspace. This dialog is only available within InDesign when you chose to install the *Configuration plug-in* during the installation of Smart Connection Pro.

The *Configuration* dialog only changes the configuration file of your workspace. It does NOT create any folders within your current workspace. Changes only affects newly generated issues.

Publications: It is possible to configure multiple publications. You can add new publications with the *New Publication* button and you can delete the selected publication with the *Delete Publication* button. The publication that is selected in the *Current Publication* drop down box is the current publication and the information in the *Sections*, *Baskets* and *Versions* groups relate to this publication. If you will have just one publication, uncheck the *Multiple publications* check box.

Sections: You can add the names of the sections of the current publications here by using the *Add Section* button. Use the *Delete Section* button to delete the selected section. If you don't have sections, leave the *Sections* drop down box empty.

Baskets: You can specify a basket for every status within your workflow, e.g. 'Editing', 'Correcting' and 'Ready'. You can add a basket with the *Add Basket* button and delete the selected basket with the *Delete Basket* button.

You can also specify the flow within your workspace. E.g. a story will be sent to the 'Editing' basket initially. After the story has been edited, the story will be sent to the 'Cor-



recting' basket and when the story has been corrected it will be sent to the 'Ready' basket. To specify a flow, you can specify the next basket in the *Next Basket* drop down box for the current selected basket. The last basket in the flow will be the ready-for-page' basket. E.g. 'Editing' will get 'Correcting' as next basket and 'Correcting' will get 'Ready' as next basket. 'Ready' does not get a next basket and will automatically be the ready-for-page basket.

Versions: It is possible to create versions of stories during the workflow. If you check the *Generate Versions* option, a copy of a story will be made for example when sending the story to another basket or when doing a checkout from InDesign. All versions will be stored in a *_versions* folder that can be found at the same level as the baskets of your publication. The *_versions* folder will not be viewed within the Smart Connection palette.

Generate issues

Before you can start working on a new issue of your publication, you have to generate a folder structure for that new issue. Once you have configured your workspace, this can be done automatically by using the *New Issue* dialog (*File | Smart Connection | New Issue...*). The only thing you have to do is to select the right publication (if any), enter a name for the new issue and choose the *Generate* button and a new folder structure for your new issue will be generated in your workspace.

Configuration details and advanced configuration options

User configuration: The workspace path will be saved in a file called *SmartConnection.xml* within the InDesign or InCopy application folder.

Another option that was included in this file is the value of the update interval of the view on the workspace within the Smart Connection Palette. This interval will be stored between the *update-multiplier* tags. The default value for this interval is 5 seconds. You can change the value per second and if you enter 0 seconds, the list will not be updated automatically anymore. After changing the update interval, you should restart InCopy and/or InDesign.

Workspace configuration: The Configuration plug-in will create a file called *scworkflow.xml* within the root of your workspace.

Except the workspace definition there are tags added to change the terms for "publication", "issue", "section" and "basket". If you change the terms, the user interface will use your terms. You can change the terms (singular and plural) by changing the value of the *PublicationName*, *PublicationsName*, *IssueName*, *IssuesName*, *SectionName*, *SectionsName*, *BasketName* and *BasketsName* tags. After changing the names, you should restart InCopy and/or InDesign.

Note: This User Guide will only use the terms "publication", "issue", "section" and "basket".