100 Things

Every InDesign User Should Know

Plus:
- What's New With EPUB in CS6?
- DocsFlow Links Google Docs to InDesign
- Getting Started With Adobe DPS

By David Blatner

DocsFlow

Plug-in enables cloud-based editorial workflows by linking InDesign with Google Docs.

DocsFlow
Em Software
www.emsoftware.com
Mac and Windows, CS4–CS6
(track changes only in CS5 and later)
Rating: ✔✔✔✔

Ratings Key

✔	Not worth it even if it's free
✔✔	Not recommended
✔✔✔	Average
✔✔✔✔	Exceptionally good
✔✔✔✔✔	A must-have

For me, one of the most memorable highlights at the PEPCON conference this year was a simple conversation in the hallway with an attendee about the DocsFlow plug-in. Staring at me in near-disbelief, he stammered, "You mean I can have all my writers and editors working in Google Docs, and have their changes automatically update in InDesign? That's awesome!" Yes, yes it is.

Google Docs, you probably know, is a free software service that works like a word processor or spreadsheet application, but in a web browser window. It's nowhere near as powerful as Microsoft Word or Excel, but it's incredibly easy to use, has enough features for most documents you'd want to create, and lets two or more people collaborate on those documents—even editing the same file at the same time!

I've been using Google Docs for the past couple of years, after becoming disillusioned with Adobe's own attempt at an online in-browser word processor, Buzzword. (As far as I can tell, Buzzword has been more or less abandoned by Adobe, and the Place from Buzzword feature that was in InDesign CS5 has been quietly removed from CS6.) The only problem has been trying to get those documents into my Adobe InDesign layouts… until now.

Merge with the Cloud

Instead of having to download your files first from "the cloud" as Microsoft Word

documents (or RTF, Excel, PDF, or whatever), Em Software's DocsFlow plug-in lets you place the files directly into InDesign. It works with both word processing and spreadsheet documents, so you can quickly and easily import stories and tables. But the real magic isn't in the importing—it's in the ability to make edits.
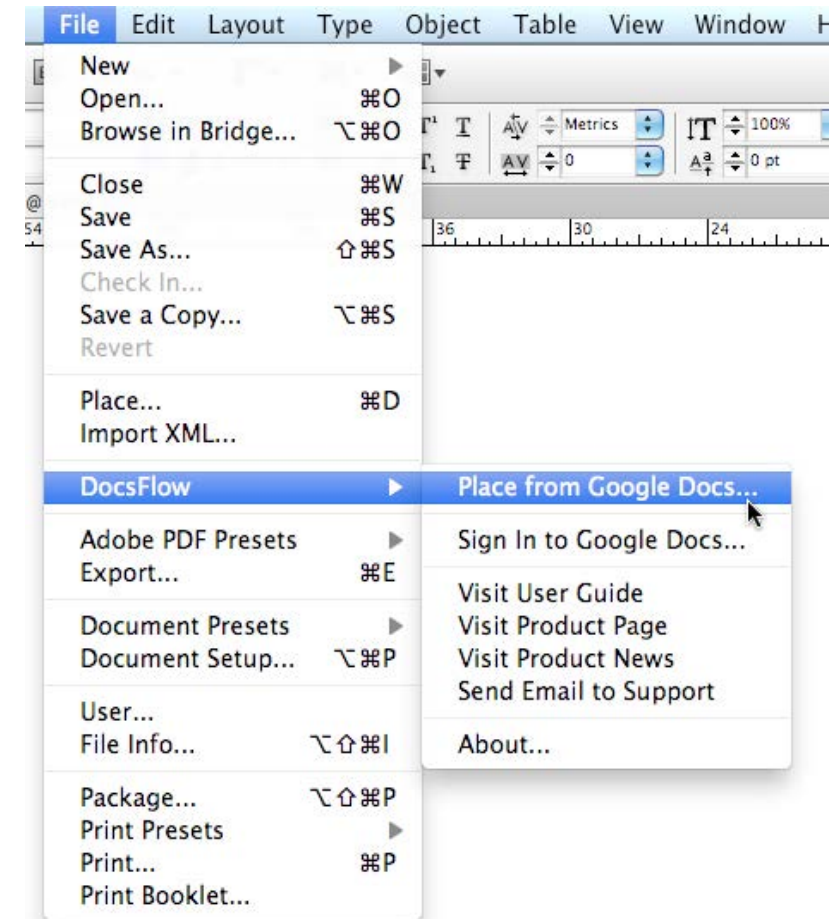
InDesign has long been able to link to Microsoft Word documents, but with a significant caveat: You can't make any edits to those files in InDesign. Well, technically you can, but all your changes (including formatting) get discarded as soon as you update to a new version of the file. With Docs Flow it's different. The good people at Em Software (who you might know from their almost 20-year history developing InData and xData) have figured out how to merge edits in the Google Docs story and edits in the InDesign story. This makes for a very powerful and efficient workflow.

Importing Docs

After installing the Docs Flow plug-in, you find a new item in the File menu: File > DocsFlow > Place from Google Docs (Figure 1). The first time you choose this, it will ask you to sign in to Google Docs, which you can do inside the plug-in itself or with a secure https connection in your web browser; either way, your password is secure.

Docs Flow provides a list of all the documents in your Google account, and lets you choose one. Unfortunately, you have to scroll through the list manually; a search field would be helpful. But the good news is that once you find your file, Docs Flow offers a number of import options.

Because many people type a blank line in-between each paragraph of text, Docs Flow lets you automatically remove all those blank lines. And because people notoriously add a slew of local formatting (font, size, and
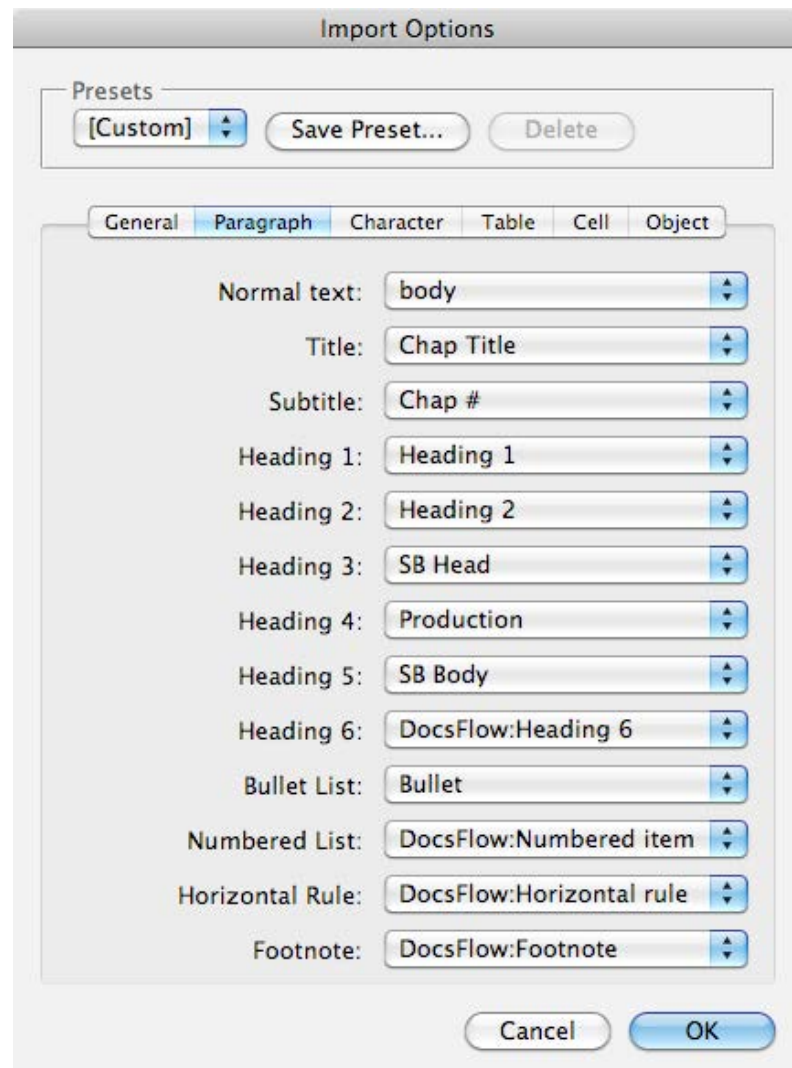

Figure 1: Placing a Google Doc is just a menu item away.

so on) over and above the paragraph styles, Docs Flow lets you strip that out, too.

The number one problem (in my opinion) with Google Docs is that it won't let you apply your own paragraph style

names—you're stuck with about ten styles such as Heading 1, Heading 2, and so on. Fortunately, Docs Flow lets you map those

styles to the styles inside your InDesign document (Figure 2). You can also tell it to map particular local character formatting (italic, bold, colored text, and so on) to your own character styles.

Similarly, you can apply different table and cell styles based on the border colors you used in Google Docs. Mapping based on color may seem clunky, but because Google Docs doesn't provide any way to apply character or table styles, it's certainly better than nothing.

Note that there's one other method of placing Google Docs files into InDesign: You can drag and drop the URL from your web browser directly on top of your page. This is cool and very efficient, but this technique bypasses the ability to set your import preferences (it applies the options that you last used).

While you have to be online to place and update your files, you do *not* have

to be online to edit them in InDesign. Once placed, they act just like normal InDesign stories.

Linking and Updating

Docs Flow lets you import a Google Doc file without linking to it if you want, but in most cases you're probably going to want to maintain the link—so that if the Google Doc file changes, you can update it in InDesign. Your story shows up in the Links panel, and moments after any edits are saved in Google Docs, InDesign displays a Modified Link icon, ready for you to update. (In CS6, it also adds the Modified link icon to the text frame itself; Figure 3, next page).

You can update a modified link like any graphic link: clicking the Update button in the Links panel or (in CS6) on the on-frame adornment. When you do this, Docs Flow downloads the file in the background,

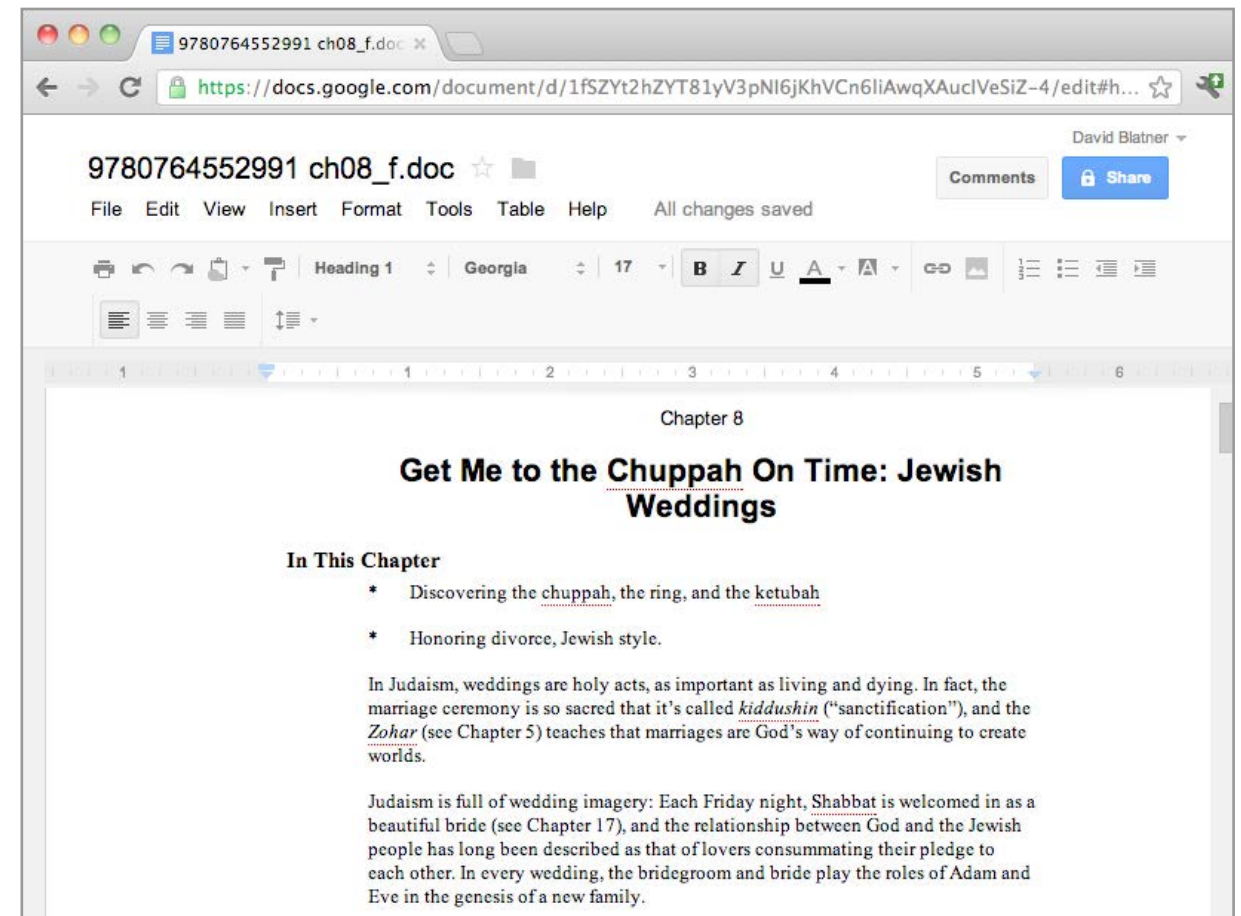compares it to the current state of the story in your document, and merges them.

If you made edits to the text, those differences show up in the Story Editor and the Track Changes panel () so you can see what has changed. However, the next time you update the link, it "forgets" the last round of edits. On the one hand, that means you lose your version control history; but on the other hand, it means you can always quickly see what has changed in the most recent round of edits, and stops Story Editor from getting cluttered up.

At some point, perhaps when the file is "baked," you will likely want to choose Unlink in the Links panel menu to break the link to the Google Doc. The current version of the story stays in place on your page, but will no longer show up in the Links panel.

The Workflow

While Docs Flow is great at importing Google Docs files, it will not let you push your changes (those you did in InDesign) back to the cloud—it's not a two-way street. You can, if you need to, export as RTF from InDesign (File > Export) and then upload that file up to Google Docs. (That's a Google Docs feature, not Docs Flow, of course.)

And, in general, I recommend keeping your Google Docs files relatively simple and applying most of your formatting in InDesign. That is, as long as you stick to the basics, you'll be fine: paragraphs, a few levels of headings, bulleted or numbered

lists. But if you try to apply a dozen or more different styles in Google Docs, you'll find yourself frustrated. Again, that's really just
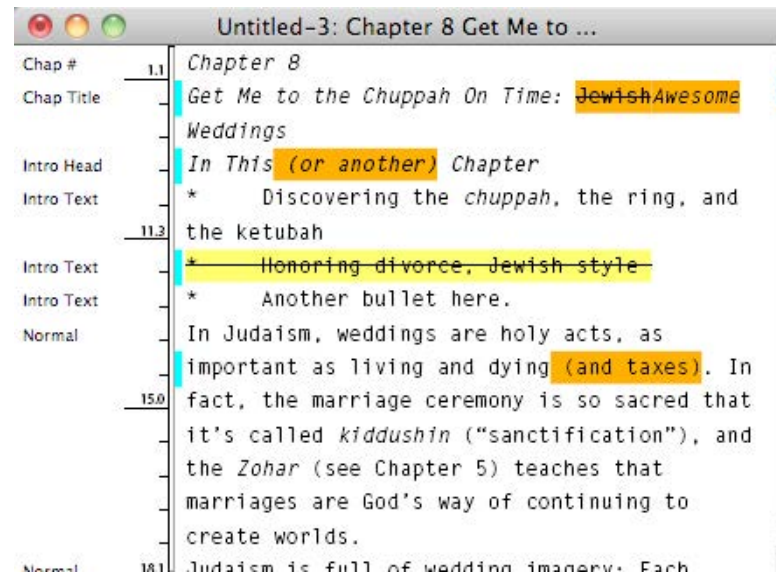
a limitation of Google Docs, which doesn't support more than a handful of styles.

Try it Today

You can (and should!) download a demo of Docs Flow from the Em Software site. It is fully functional except that it limits you to a single linked file per document, which is all you'll need to test it out.

There is detailed documentation online, including technical details about how it works and workflows they suggest. While these are not available as an offline PDF, if you're using Google Docs, you're probably online anyway.
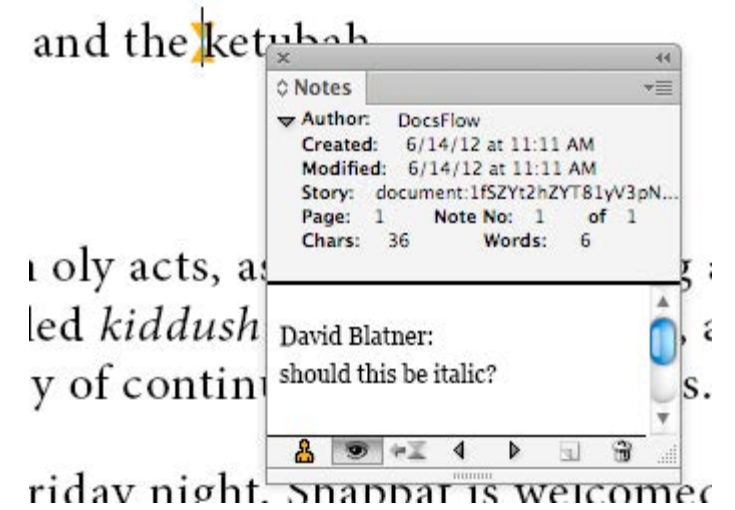
I love the ability to import my Google Docs files, edit or format them in either place, and merge the changes together. It's fast, easy, and makes for a very flexible workflow. You can even see comments written in the Google Doc (they show up in InDesign's Notes panel; Figure 5). I would love it if Em Software extended this entire

Figure 4: Docs Flow keeps track of how a story changes when you update it. In this case, the orange text was edited in InDesign and the yellow text was edited in Google Docs.

system to work with Microsoft Word documents, which by necessity so many people continue to use.

It's not a perfect solution, though. I was frustrated to find that any images I had placed in my Google Docs files were anchored (good) *and* embedded into my InDesign file as though they had been pasted in (bad!). There have also been a few times that I made so many edits to the Google Doc that Docs Flow got confused about what should be formatted with what, and ended up applying the wrong styles. That may be a bug that will be fixed, or it may just be an indication that it's better to

Figure 5: Comments added to a Google Doc appear in InDesign's Notes panel.

hold off on importing the Google Doc into InDesign until you're at least mostly finished with writing it.

Docs Flow is one of those plug-ins that can literally be life-changing in how much it improves your workflow, especially when you work with documents written or edited by a number of people. It's certainly no replacement for the power of Adobe InCopy, but it's more than enough for many (and perhaps most) InDesign users.

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David Blatner is the Editorial Director of *InDesign Magazine* and the co-creator of InDesignSecrets.com. He also helped design the PatternMaker plug-in from Teacup Software.

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