InDesign
MAGAZINE 65
September 2014

Long Documents

› **Round-tripping Word Content**
› **Building Book Covers**
› **Indexing Plug-ins**

By Jamie McKee

InReview: WordsFlow Pro 2.0

WordsFlow Pro 2.0

Em Software

http://www.emsoftware.com

WordsFlow: US$200

WordsFlow Pro: US$300

Mac and Windows, CS5–CC 2014

Rating: 🦋🦋🦋🦋🦋

We all know we can place Microsoft Word and Excel documents into our InDesign files. And you probably know you can create links to those documents (via the "Create Links When Placing Text and Spreadsheet Files" option in the File Handling pane of the Preferences dialog box). That way, if any of the text or information in your Word/Excel documents changes, bringing those changes into your InDesign file is just a click away. What you soon find out, though, is that any edits you make to your placed file in InDesign—a different font, a different size, a different color . . . anything!—is lost the moment you update. Frustrating!

Thankfully, the folks at Em Software are tackling this problem head-on. Much like their DocsFlow plug-in for working with Google Docs documents, Em Software recently released version 2.0 of their WordsFlow Pro plug-in for working with Microsoft Word files that enables full two-way capabilities. The previous version of WordsFlow enabled merge-updating of changed Word/Excel documents, preserving your InDesign edits, while the Pro 2.0 version adds a full two-way workflow, by either updating your linked Word document in place, or creating a new Word document from the current contents of any InDesign story.

Getting Started

Getting started with the WordsFlow Pro plug-in couldn't be easier. Once you download the software, simply double-click

the file, which will open the Adobe Extension Manager and run you through the install process. A fresh start of InDesign will bring up the licensing window, where you can fill in your licensing information, or choose to demo the software, which allows full functionality for one link. From there, it's as simple as choosing **File** > **WordsFlow** > **Place with WordsFlow** to place text (in .docx, .doc, .rtf, or .txt format) or spreadsheet files (either .xlsx or .xls format). (Figure 1) The document will be placed as a linked file whether or not you have the "Create Links When Placing Text and Spreadsheet Files" preference selected. Using InDesign's normal Place command will give you the same result.

There's also a **File** > **WordsFlow** > **Place without WordsFlow** option if, on occasion, you need InDesign's default (unlinked) place behavior. WordsFlow Pro uses InDesign's native Place dialog box, giving you full access to the Word Import Options, such as style-mapping support. All WordsFlow
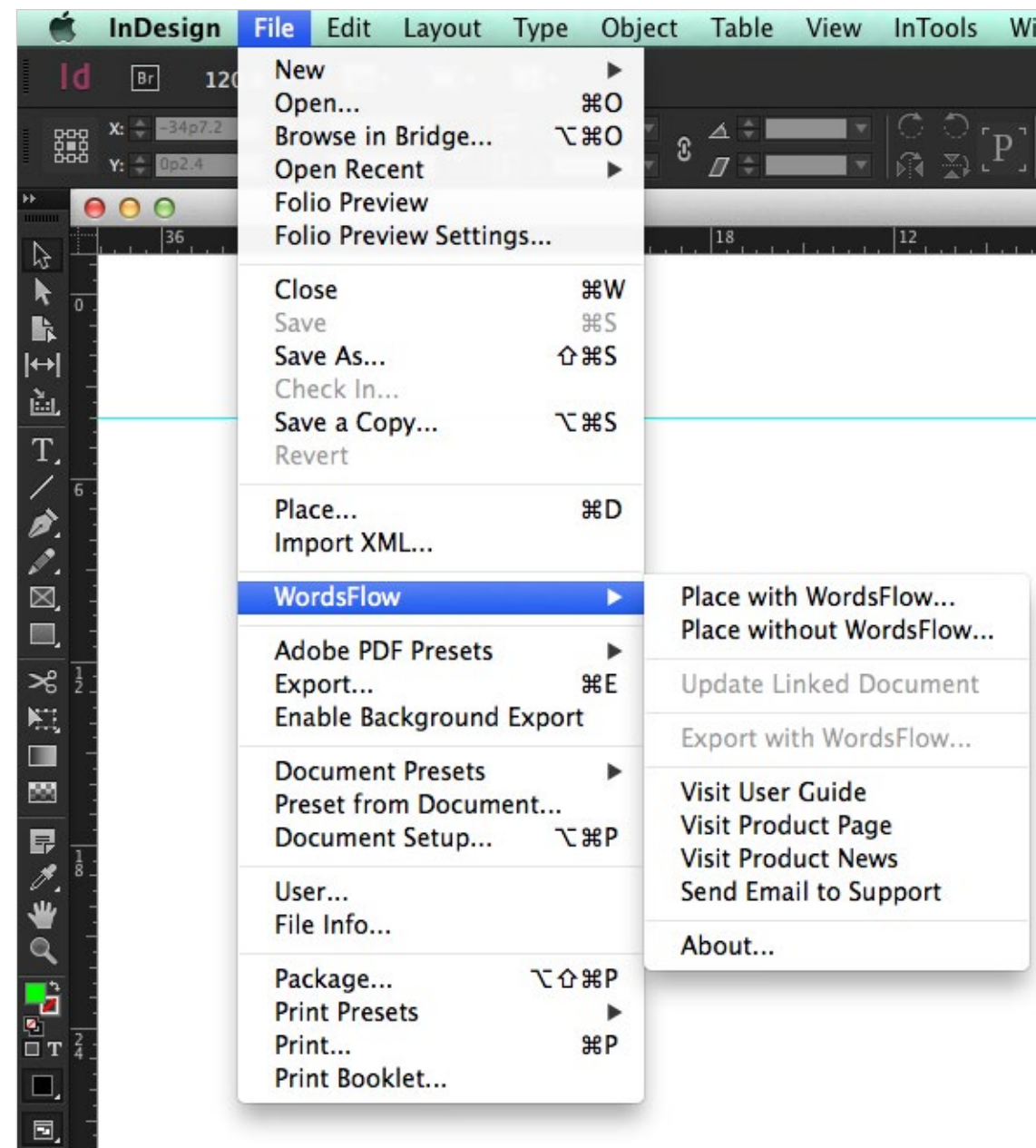

Figure 1: The WordsFlow menu.

Pro-placed files will have a "wf" badge next to the link icon on the text frame, indicating text that you can format with abandon, confident that if and when that Word file changes, instead of InDesign overwriting the story and losing all your formatting,

WordsFlow Pro steps in behind the scenes and merges all the external file changes into the existing story, so you never lose any work.

Test Merge

I started my evaluation by testing WordsFlow Pro's merge—updating of changed Word/Excel documents in InDesign CC. I placed a heavily formatted Word file in an InDesign template, and then made changes to the original Word document—adding and removing text, applying local, character, and paragraph style formatting, adding a numbered list, even inserting a footnote—and, after updating the linked file in InDesign, all these changes made it through to my document with my formatting in place!

Next, I set out to test the exact same functionality with an Excel table consisting of 19 columns × 374 rows with multiple merged cells. After applying table, cell, and

paragraph styles to the table, I selected Edit Original and set about making changes to the data in Excel. I deleted some rows, swapped some columns, and changed some numbers. Switching back to InDesign, I thought I had encountered a bug with WordsFlow Pro, because my table began to immediately update without any input from me. When I contacted Em Software about this, they explained the situation:

> " . . . if you're using the 'Edit Original' command to bring up the file in Word/Excel, then InDesign's default behavior on app switch-in is to update the link automatically. If you open the Word/Excel file yourself, when you go back to InDesign, it'll show the out-of-date
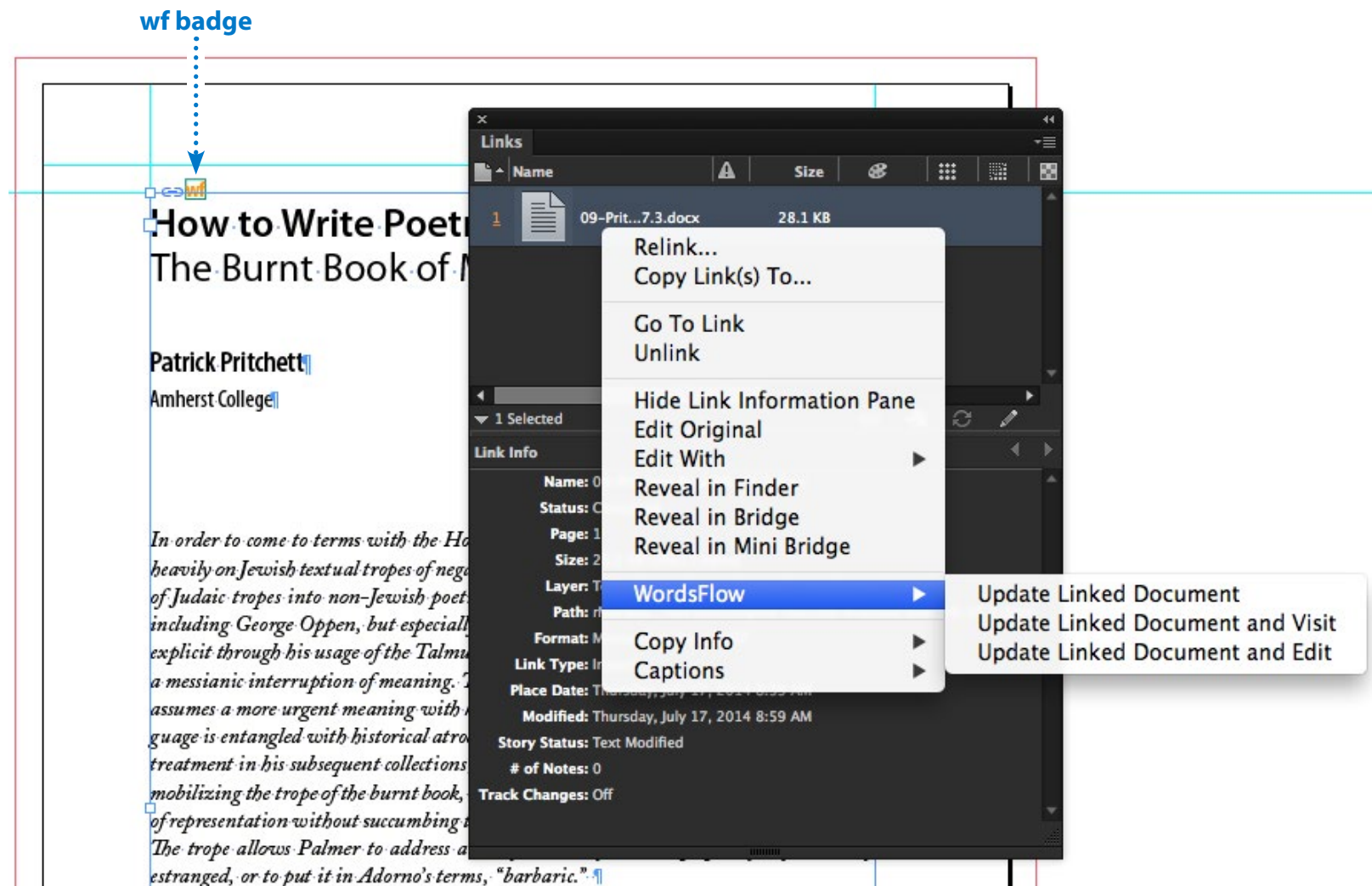
symbol and give you the option to update the link."

I've been using InDesign since version 1, and I never realized this! Never too old to learn new tricks, as they say. At any rate, the new Excel data and changes were made in the InDesign document, and all the table, cell, and paragraph styling I had applied was retained.

It's Automatic

Retaining your formatting in InDesign after updating Word and Excel documents has been the core functionality of prior versions of WordsFlow. What the Pro 2.0 version adds is the ability to send the changes you've made in InDesign back to your Word document, completing the workflow cycle. Thus, with the WordsFlow Pro version, you can now update your Word documents in place with the latest linked InDesign story contents, and you can export any InDesign story to a new Word document as well

Figure 2: Text files placed with WordsFlow receive a "wf" badge, and show up in the Links Panel where you can update or create linked documents.

(which also links it automatically). Keep in mind that this two-way functionality is currently for Microsoft Word files only.

WordsFlow Pro adds two items to its **File** > **WordsFlow** menu: Update Linked Document and Export with WordsFlow (both are also available in a contextual menu on the story when editing, and in the Links panel when a WordsFlow-linked story is selected), as shown in Figure 2.

Update Linked Document (only available when the link is up to date) will update the linked Word document with the contents of the current InDesign story, re-creating as much as possible the look and feel of the InDesign contents (including fonts, spacing, indents, etc.). Em Software notes that some users may not want to disturb the current formatting of the Word document, but only merge in the textual changes, and that feature is on their road map.

Export with WordsFlow (available only when you're in text editing mode in a story) will create a new Word document with the current contents of the selected InDesign story, re-creating the look and feel as above, and linking the current story to the newly created Word document.

Conclusion

I tested the new Pro features, and was thoroughly impressed with the results: using both character and paragraph styles, I made extensive changes to a Word file in

InDesign, changing fonts, font style, size, color, spacing—even adding strikethroughs, underlines, footnotes, and hyperlinks—and merged those and actual content changes back to my Word document. All of my changes made it back into my Word document, with minor exceptions (see sidebar). Of course, certain InDesign-specific styling can't be replicated in Word (such as drop caps, nested styles, and GREP styles), but hopefully future updates to WordsFlow

What You Leave Behind

» Some colors didn't make it back into Word properly (but that's not a complete surprise; it's not possible to always precisely convert colors between Word and InDesign because Word supports only RGB colors).

» Colors applied to strikethroughs and underlines were ignored and defaulted to black.

Pro will address these and other issues. For instance, although InDesign supports only footnotes, Word supports both footnotes and endnotes. It would be great if you could choose to convert InDesign's footnotes to either Word footnotes or endnotes.

In order to use WordsFlow Pro, you'll need a Pro-level license. If you're already a WordsFlow user as of June 28, 2014, Em Software will provide you with a free Pro upgrade for your current license. Simply email Em Software (sales@emsoftware.com) your current license and they'll send you back a Pro license. Otherwise, WordsFlow Pro 2.0 costs $300 and is available for InDesign CS5 through CC 2014 for both Mac and Windows.

WordsFlow already offered InDesign users a solution to the Microsoft Word/Excel-to-InDesign workflow problem we've all been wrestling with for years—updating linked files without losing formatting. WordsFlow Pro 2.0 takes the final step, offering full two-way capabilities so you can

send the changes you've made in InDesign back to your original Word documents. If you regularly work with text files that are likely to be edited (and who doesn't?), you need to take a look at WordsFlow Pro 2.0!

■

Jamie McKee is a book designer and typesetter for university presses throughout the US. More information about him can be found at mackeycomposition.com.

Become a Member of InDesignSecrets!

Premium members receive *InDesign Magazine*, plus many other great benefits!

Visit indesignsecrets.com/membership for all the great reasons to join. Use the discount code WORKFLOW to get $10 off!