

# Smart Connection 9 for InCopy Sticky Notes

 This document is part of the documentation for Smart Connection 9 and is an extract from the former Smart Connection 9 User Guide for InCopy. For more information about using Smart Connection, visit the [Help Center](#).

**Sticky Notes are short messages that can be placed anywhere on the layout as a way to communicate with other users or to act as self reminders.**

This way you can for instance leave your colleagues instructions about making changes to certain content on the layout, or leave yourself reminders about changes that you want to make yourself.

This document describes in detail how to work with Sticky Notes.

## 1. The Sticky Note Tool

Smart Connection adds a Sticky Note Tool to the InCopy Toolbox with which Sticky Notes can be created. The Sticky Note tool is placed after the Position tool.

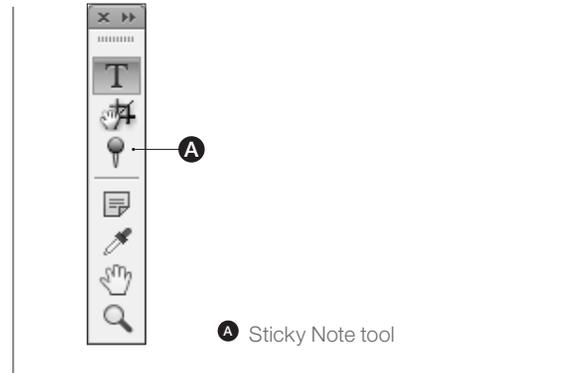


Figure 1. The Sticky Note tool is added to the Toolbox

For detailed information about how to use the Sticky Note tool, see *section 2.1 Creating a Sticky Note*.

## 2. A Sticky Note

Sticky Notes can be used to leave short messages for other users—including InCopy and Content Station users—for instance to notify them of any changes or corrections that need to be made to the content of the page.

### Components

A Sticky Note consists of a Pin (marking the part of the page that the note applies to) and the Sticky Note itself. Both are connected so that it is always clear which Pin belongs to which Sticky Note and vice versa.

The main components of a Sticky Note are:

- **Text area.** For entering the comment or message.
- **Status menu.** For assigning a status to the Sticky Note (such as Accepted, Done, etc).
- **Reply button.** For replying to the Sticky Note.
- **Copy button.** For copying the text of a note.<sup>1</sup>

Sticky Notes can be created, replied to, edited, hidden/shown, repositioned, resized, or deleted. Each action is explained in the following sections.

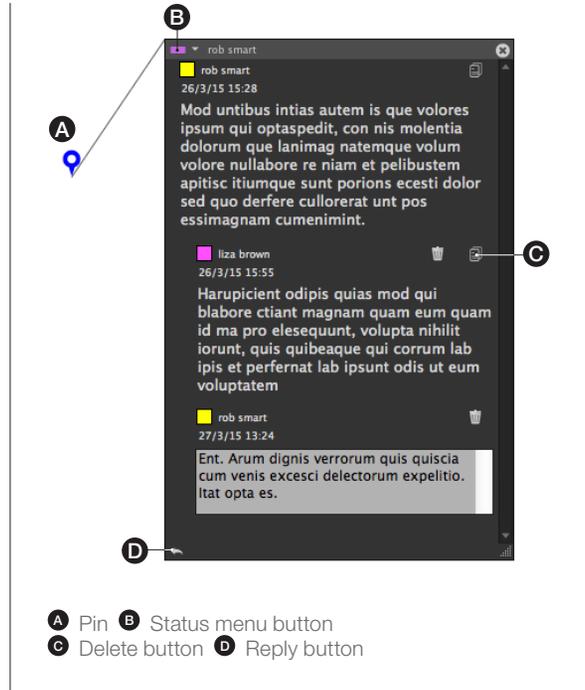


Figure 2. The main components of a Sticky Note.

<sup>1</sup> Requires Smart Connection 9.5.1 or higher.

## 2.1 Creating a Sticky Note

Before creating a Sticky Note, be aware of the following restrictions:

The Sticky Note tool cannot be used when:

- You are not logged into Enterprise.
- The article is opened as Read-only.
- The article is not part of the Enterprise system.
- The article is not placed on a layout.
- You are viewing the article in Galley or Story view.
- You are viewing the article in a screen mode other than Normal (View > Screen Mode > Normal).
- You are editing an Adobe annotation (Windows > Editorial > Notes)
- You have not been given sufficient access rights by your administrator.

To create a Sticky Note, perform the following steps:

**Step 1.** Select the **Sticky Note tool** in the *Tools* panel.

The mouse pointer will change into the Sticky Note cursor (☞).

**Step 2.** Click once on the layout where you want to create the Sticky Note.

The text cursor is automatically placed inside the text area.

**Step 3.** Type your message.

**Step 4.** Optional) Click the **Status** button to show the list of statuses and select a status for the Sticky Note:

- None
- Accepted
- Rejected
- Done

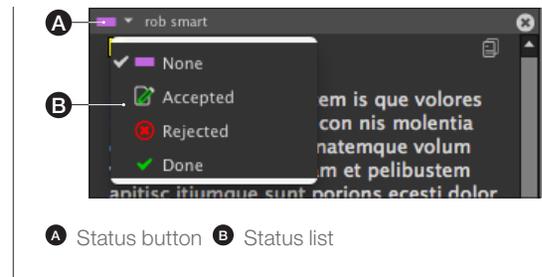


Figure 2.1. The Status list of a Sticky Note.



When checking-in the layout, messages and replies that are empty are automatically removed.

## 2.2 Replying To a Sticky Note

It is possible to reply to a Sticky Note, but only to the main message; it is not possible to reply to a reply.

Replying to the main message in a Sticky Note can be done in the Sticky Note or by using the Sticky Note panel.

### Replying from within the Sticky Note

To reply to the main message from within the Sticky Note, perform the following steps:

**Step 1.** Click the **Reply** button of the original message.

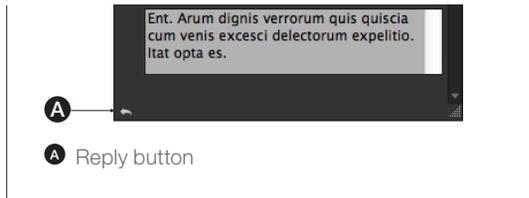


Figure 2.2. The Reply button in a Sticky Note.

A new text area appears at the bottom of the Sticky Note.

**Step 2.** Enter your reply.

### Replying by using the Sticky Note panel

For information about replying to the main message by using the Sticky Note panel, see *section 6.5 Replying To a Message*.

## 2.3 Editing Sticky Note Content

Editing a message or reply in a Sticky Note can be done in the Sticky Note or by using the Sticky Note panel.

### Editing from within the Sticky Note

To edit a message or reply from within the Sticky Note, do one of the following:

- When the message or reply is active (text shown against a white background) click inside the text area (it is not necessary to first select the Type tool).
- When the message or reply is non-active (text disabled: shown against a gray background) click the edit icon to make the message active.

 As soon as a message has been replied to, this message becomes disabled (grayed out) and can only be edited once all replies have been deleted.

### Editing by using the Sticky Note panel

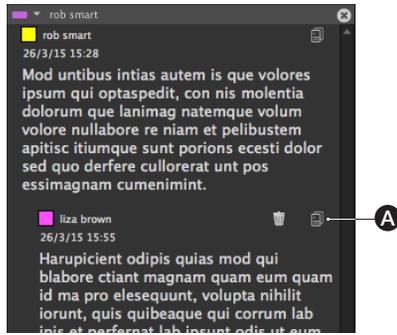
For information about replying to the main message by using the Sticky Note panel, see *section 6.4 Editing a Message*.

## 2.4 Copying the Content of a Sticky Note

Copying the content of a message or reply can be useful when it contains text that you want to use in the story.

To copy the content of a message or a reply, click the copy icon.

 This feature requires Smart Connection 9.5.1 or higher.



 Copy button

Figure 2.4. The Copy button in a Sticky Note.

## 2.5 Repositioning Sticky Notes

Pins and Sticky Notes can be repositioned by doing the following:

- **Pin:** Drag the pin to a new location.
- **Sticky Note.** Click any empty part of the Sticky Note and drag it to a new location.

 It is not possible to drag a Sticky Note out of the document window area; when doing so, it will snap back to the document view.

## 2.6 Showing/Hiding Sticky Notes

Sticky Notes and Pins can be shown and hidden all together or independently.

### **Sticky Notes**

To hide Sticky Notes, do one of the following<sup>1</sup>:

- Click the Close icon in the top right corner of the Sticky Note.
- Double-click the Pin.
- Choose View > Sticky Notes > Hide Sticky Notes.
- Choose View > Sticky Notes > Hide Pins and Notes.

To view hidden or collapsed Sticky Notes, do one of the following<sup>1</sup>:

- Double-click the Pin.
- Choose View > Sticky Notes > Show Sticky Notes.

### **Pins**

To hide Pins, do the following<sup>1</sup>:

- Choose View > Sticky Notes > Hide Pins and Notes.

To view hidden Pins, do the following<sup>1</sup>:

- Choose View > Sticky Notes > Show Pins and Notes.

---

<sup>1</sup> It is assumed here that the article is viewed in Layout view (View > Layout View).

## 2.7 Deleting Sticky Notes

It is possible to delete a reply to a Sticky Note or to delete the main Sticky Note itself.

 Only Sticky Notes or replies to Sticky Notes that you have created yourself can be deleted.

 Messages and replies that are empty are automatically removed when checking-in the layout.

### Deleting a reply

To delete a reply to a Sticky Note, do the following:

- Click the **Delete** button of the reply.

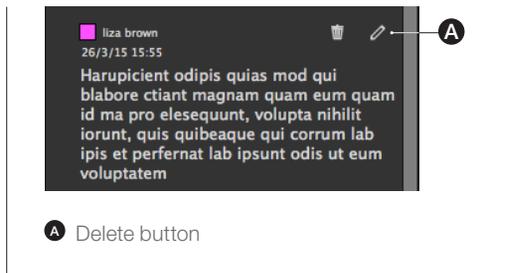


Figure 2.7. The Delete button in a reply.

One of the following occurs:

- When the reply contains no content, it is deleted straight away.
- When the reply contains content, a message appears asking you to confirm the action. Click **Yes** to delete the reply.

### Deleting the Sticky Note

Deleting a Sticky Note is done by deleting the Pin. Do one of the following:

- Select the Pin by using the Selection Tool, Direct Selection Tool or Sticky Note tool, and press the **Backspace** or **Delete** key.
- Right-click the Pin to bring up the context menu and choose **Delete Sticky Note**.

One of the following occurs:

- When the reply contains no content, the Pin and the Sticky Note are deleted straight away.
- When the reply contains content, a message appears asking you to confirm the action. Click **Yes** to delete the Pin and the Sticky Note.

### 3. Sticky Notes in Offline Mode

When logged out from Enterprise and opening an offline article, the Sticky Notes functionality is not available. This means that new Sticky Notes cannot be created and existing Sticky Notes cannot be edited.

### 4. Printing or Exporting a Sticky Note

Sticky Notes cannot be printed or exported to PDF.

### 5. Scrolling the Layout

Sticky Notes will be constraint inside the document window while scrolling horizontally. However, when scrolling vertically, Sticky Notes will be hidden when the top is out of the document window area.

## 6. Using the Sticky Note Panel

The Sticky Note panel provides an overview of all the messages in all Sticky Notes that are placed on the layout. From the panel, messages can be sorted, filtered, edited and replied to.

### Accessing the panel

To access the Sticky Note panel, choose Window > Extensions > Sticky Note.

### Components

The panel consists of the following components (see figure on the following page):

- **Filter pane.** For filtering the messages by status.

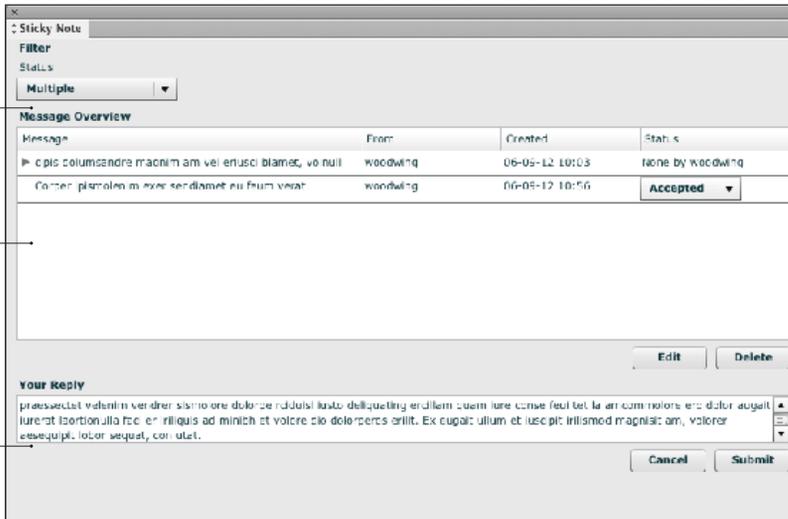
- **Message overview.** Provides an overview of the messages and their replies in all Sticky Notes on the current layout.



Replies to a message that are hidden can be made visible by clicking the expander in front of the message.

- **Reply box/Edit box.** For replying to a message or editing an existing message.

Using these components, messages can be filtered, sorted, their status can be changed, they can be edited, they can be replied to, or they can be deleted. Each is explained in the following sections.



- A** Filter pane **B** Message Overview **C** Reply box

Figure 6. The Sticky Note panel

## 6.1 Filtering Messages

Messages in the Message Overview can be filtered by the status that they have been assigned. To filter the messages this way, perform the following steps:

**Step 1.** Choose a status from the **Status** list.

The Message Overview is automatically filtered. At the same time, the chosen status is displayed below the list to make it clear how the messages are currently filtered.

**Step 2.** (Optional) Continue choosing statuses from the list.

In case a status was already part of the filter, it will be removed from it; if the status was not yet part of the filter, it will be added.

Each time a status is chosen, the Message Overview is filtered and the summary of chosen statuses is updated.

**Step 3.** To clear the filter and show all messages with all statuses, choose **All** from the Status list.

## 6.2 Sorting Messages

By default, messages in the Message Overview are added to the list in the order in which they are created.

Messages can also be sorted by each of the available columns.

To sort a column, click the column header; to sort the column in the opposite direction, click the column header once more.

### 6.3 Changing the Status

To change the status of a message, perform the following steps:

**Step 1.** Select the message in the Message Overview.

The Status list for that message appears.

Only the main message has a status; any replies to it do not have a status.

**Step 2.** Choose a status from the list.

### 6.4 Editing a Message

Messages can be edited when:

- You are the creator of the message
- No one has replied to the message yet

To edit a message, perform the following steps:

**Step 1.** Select the message in the **Message Overview**.

**Step 2.** Click **Edit**.

The message appears in the *Edit Message* window.

**Step 3.** Edit the message.

**Step 4.** Click **Save**.

## 6.5 Replying To a Message

To reply to a message, perform the following steps:

 It is only possible to reply to the main message; it is not possible to reply to a reply.

**Step 1.** Select the message in the **Message Overview**.

**Step 2.** Click inside the **Your Reply** box.

**Step 3.** Enter your reply.

**Step 4.** Click **Submit**.

## 6.6 Deleting a Message

To delete a message, perform the following steps:

**Step 1.** Select the message in the **Message Overview**.

**Step 2.** Click **Delete**.

A message appears asking to confirm the action.

**Step 3.** Click **Yes**.

The message is deleted.

## 7. Sending and Receiving Updates

When broadcasting is used, any changes that you or other users make to Sticky Notes (such as creating new Sticky Notes, repositioning Sticky Notes, replying to messages, etc.) are processed in the following ways:

- **InDesign users** will receive the Sticky Note changes immediately after the InCopy or Content Station user saves their work through a Save Version or Check-in action.
- **Content Station users** receive an “Update Available” message in the Publication Overview window as soon as other users save their work through a Save Version or Check-in action. They then have to reload or refresh the window to see the changes.
- **InCopy users** need to do an “Update Geometry” action or re-open the layout to receive the Sticky Notes changes from InDesign or Content Station users after they have saved their work through a Save Version or Check-in action.

## 8. Revisions

The following sections list the changes that have been made to this document.

### 8.1 Version 1.1.1

Released August 2015

Changed the link to the Online Help into a link to the Help Center.

### 8.2 Version 1.1.0

Released April 2015

- *Section 2. Copying the Content of a Sticky Note.* New.

### 8.3 Version 1.0.0

Released November 2014

- First version created by extracting chapter 11 ‘Sticky Notes’ from the Smart Connection User Guide for InCopy.