

A Guide to Working with Templates

The templates housed on the Design Center were designed by a professional information designer and State Elections staff to ensure that our voting materials are usable and compliant. They've also been created to help bring consistency to the design, language and processing of voter materials in our state. Template use is optional but recommend.

Step lightly if altering templates. Be sure that changes are backed up with good reason or are the result of changes in law. Remember the top 10 election design best practices, and leave time to review and test your changes before using them.

Feedback regarding the usability of templates is extremely valuable to their success. Please share your experiences and recommendations with the rest of the elections community so we can continue to improve our templates.

Preparation

You will need the Adobe Suite version 4.0 or higher in order to work with templates. Most of them use only InDesign, but in some cases you'll need other programs such as Illustrator or Photoshop. If you do not have the Adobe Suite but would like to use the templates, post a message to the discussion board and ask your design community for assistance.

Customizing templates to include your county information and match your county branding is a quick and easy process. Follow the steps outlined in this guide to help you along the way.

Process

Downloading Files from The Design Center

Templates on the Design Center are zipped files. This means everything you need has been packaged together in a single folder. Begin by downloading the template zip file from the Design Center. You can do this by double clicking, or right clicking to select **Save as....**

Save the zip file to your desktop or another folder that makes the most sense for you.

Unzipping Zip Files

Right click on the zip file you downloaded and select **Open With > Compressed (zipped) Folders**. A window will appear showing the contents of the zip file. There will be 3 items — a native InDesign file, a fonts folder and a links folder. The fonts folder holds all the fonts used in the template document, while the links folder holds all the images.

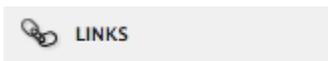
Double click the InDesign file to open it.

Document Fonts and Links

You may get a pop-up box when opening the InDesign file. It'll either say there's a problem with the document links, or that fonts could not be found. Here's what you need to do to resolve these issues.

Missing Links

Hit OK and re-link the missing link(s) using the links panel, as the pop-up instructs. The links panel can be found in the panels menu on the right hand side of your InDesign work area. It has an icon that looks like a chain link. If you don't see it, click on **Window > Links** from the options listed.

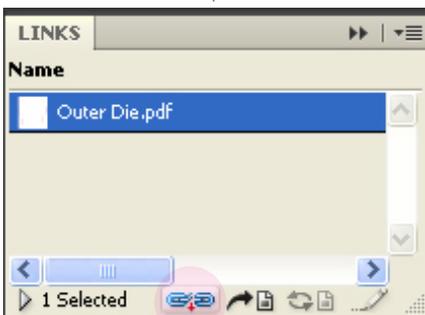


links panel icon

Missing link(s) will be marked with a red question mark. Click on one of the missing links and hit relink at the bottom of the panel. The relink button looks like a broken chain.

Relink the missing image(s) by guiding the file locator to the links folder, which is within the zip file you just downloaded. All done!

links panel and relink icon



Missing Fonts

This error message means fonts used in the document need to be installed on your computer. Do not hit OK if you get this error message, instead, close out of InDesign. Copy the fonts from the fonts folder, which is in the zip file you downloaded, to your computer's fonts folder. You can find your fonts folder in **C:drive > Windows > Fonts**.

Now try opening the InDesign document again. You should no longer receive a font error message. You may need to close out of the InDesign program completely, rather than closing only the document, before trying to reopen the file.

All templates use the same font — one called Universe. This means that you should only need to install fonts this once. Hooray!

Customizing

At this point you should be looking at a template in InDesign, with all fonts and links properly loaded. *Hint: if text is highlighted in a light pink color, then they were not properly loaded to your fonts folder. In this case double check that the fonts copied over to your computer properly and repeat the last step from if needed.

Good? Great! Now it's time to customize the template with your county's specific information (text) and branding (color).

Layers

Templates are made using multiple layers — one that contains static information, and one that contains variable information (names of layers may vary). The static layer should be locked when you open a file, meaning you won't be able to change anything on that layer unless you unlock it.

To lock and unlock layers visit the layers panel to the right of your work area and click on the picture of a padlock.



layers panel and padlock icon

Testing Modifications

If modifying templates, it's a good idea to test your changes on the voting public. If you're unable to perform a usability study (e.g. conduct observations while voters read and use the document), then post your changes to the Design Center for peer review.

If you do make changes and find them to be effective, share your experience with the rest of the elections community. Your idea(s) can be implemented in the next template revision.

Plugging in Your County Information & Branding

County information refers to text, which could include your county name, contact information, and/or postal permit codes. This may also include your county logo should you choose to include it.

County branding refers to a single color used to represent your county. Not all templates include color.

Text

Select the variable information layer. Next, select the text tool from the tools menu to the left of your screen. The text tool is the fourth tool down from the top and has a capital **T** on it. You can now select text within the template to edit with your county specific information.

Voilà!

Color

If the template you're working with involves color, such as ballot envelopes or signage, you can change the background color to match your county branding. Using the same color in all of your voter materials is a great way to provide visual consistency, allowing voters to easily recognize items that come from your office.

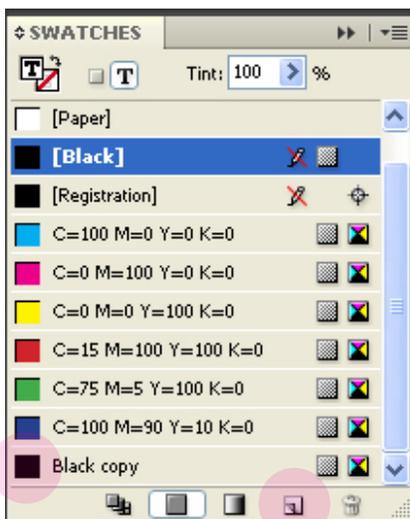
To change the color, start by selecting the proper layer. Next, select the black arrow tool from the tools menu (at left) and open the swatches panel from the panels menu (at right). There's an image of the swatches panel on the next page for reference.

Select the colored area(s) in the template using the black arrow tool. You can select more than one area at a time by holding down the shift key. Click on a color in the swatches panel to change the template.

Creating a New Color

Click the new swatch icon found at the bottom of the swatches panel. A new swatch will appear as a copy (see below image at left). Double click on the copy to access the Swatch Options window (see image below at right). Change color type to **Spot** and set color mode at **PANTONE Solid Uncoated**.

Choose a color from the long list of options in that window. You'll notice a PANTONE number associated with each color, such as PANTONE Yellow 012 U. These numbers help ensure the color prints exactly the same way every time. Pretty cool right?



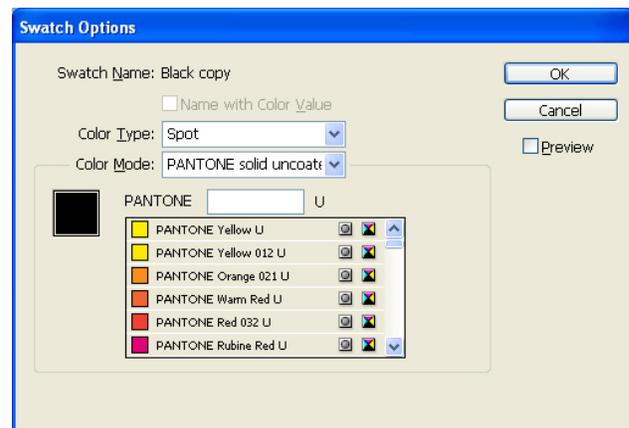
swatches panel with the new swatch button and a newly created swatch are highlighted.

Tips for Choosing a Color

You can either select an existing color from the swatches panel, or create a new one. A few things to remember when selecting a color — first any text placed on top of the color block needs to remain legible.

It's recommended to use a dark background color and white type to create contrast. This will make your text (which is your message) clear. White type against dark backgrounds pops more than black type against light colored backgrounds.

The other thing to keep in mind when choosing a color to represent your county is the colors other counties are using, especially the ones bordering you. It's worth reaching out to them before you get rolling to avoid using the same, or similar, color. Having the same color across counties, especially ones close by, could confuse voters and you may end up receiving more materials from neighboring counties by mistake.



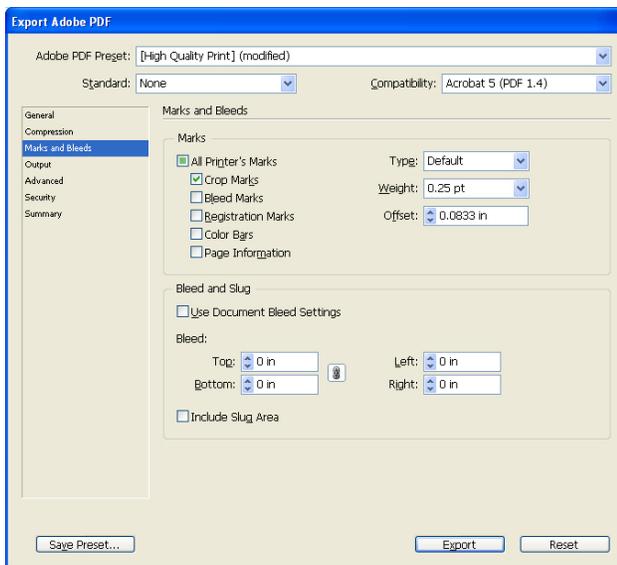
swatch options window

Save & Package

Save and package your files for posterity and print. Go to **File > Package**. This will make a folder similar to the one you downloaded that will contain all the fonts and images you used. It's a good idea to package files so you can more easily revise them in the future.

You'll also want to make a PDF to send to the printer. **Go to File > Adobe PDF Presets > [High Quality Print] > Save**. A window will appear. Click Marks and Bleeds and put a check mark next to crop marks. Hit Export and your done.

If you're sending your art to a professional printer, most will only need the PDF and your PANTONE color code (if color was used), but make sure to ask what they need as printers often have different requirements.



PDF exporting window