



Create layout
templates

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When a professional layout program is to be used by beginners or documents are to be exchanged between several users, fundamental questions arise:

- How can I, as a beginner, work with a professional layout program without overwhelming myself or investing time in training?
- How can I, as a professional user, prepare documents for beginners without overwhelming the beginner?
- How can I, as a professional user, ensure that a beginner does not make any unwanted changes?

When you share documents between multiple users, all users usually have the same editing options, because they use the same program. This means that anyone can make any change. There is no effective protection against unwanted changes..

However, if you are a beginner and want to work with a professional layout program, or if you are a professional user and want to provide documents to beginners, this can be problematic. Most of the time, beginners are overwhelmed by the multitude of options, even though the task may be quite simple for the user. In addition, the beginner can make unwanted changes at any time.

The answer to all these issues is to limit the editing options.

The great advantage of VivaDesigner is not only that you can use it on the desktop and on the web, but also that you can individually limit the editing options of the program or even of a single document. Thus, even a user who has never worked with a professional layout program will not be overwhelmed and can focus directly on his task. The restrictions apply to all areas of the program such as documents, pages, objects, images, texts, tables and palettes.

We call such a document a layout template.

This section we explains what options are available for creating layout templates and what should be considered when creating layout templates.

Editing options

The central option for creating layout templates is restricting the editing options. To restrict the editing of documents there are several options that work additively:

- Working mode
- Access rights
- Passwords for Alias pages and layers

In the Working Mode, three options are available across the board: **Beginner**, **Advanced** and **Expert**, each of which allows a predefined selection of options. While all the program's options are available to users in the **Expert** work mode, the user cannot, for example, visualize text style sheets in the **Beginner** work mode. The options can be set independently of documents for the program or for the role in VivaCloud.

In terms of access rights, there are over 30 options that control, for example, the editing of text or objects in detail. So the options refer either to individual documents or to a role in VivaCloud.

You can protect individual Alias pages or layers with a password. This option is useful, for example, if you want to give the document to several translators, but they should always have access only to the layer with the respective language.

All the options can be combined, which means that the **Beginner** work mode cannot visualize text style sheets, even if this right is not restricted by the access rights. In return, the user cannot create objects in the **Professional** working mode if this option is locked via the access rights. A user who basically has an access to layers can edit only the layers which are not assigned with a password or from which he has the password.

The lowest common denominator applies in each case. This is especially true if access rights are defined both for the document and via the role in VivaCloud.

Work mode and access rights are available both on the desktop and on the web.

Working Mode

Choose **Preferences > Program > Working Mode** if you want to restrict document editing across the board. If you want to use this option in VivaCloud, choose the appropriate option in the role.

See the Preferences section for more information.

Access rights

Choose **Preferences > Access Rights** if you want to restrict editing for all users. Users who want to remove this restriction need a password.

Please refer to the section **Working in a Team**.

It is also possible to restrict access rights in VivaCloud for each role separately. This option is dynamic, which means that a user with the “Graphic Designer” role may have more editing rights than users with the “Student” role. The access rights defined in VivaCloud apply to all documents stored in VivaCloud, regardless of whether they are edited in the browser or opened using the desktop version.

Both options can also be used in a combination. For example, if it is determined that no role should be able to create additional document pages, this option could basically be saved with the document, but could also be defined with each role. Which way to choose depends on whether the document editing is done via VivaCloud or locally. If the documents are stored locally on a desktop computer, the access rights must be defined in the document. Once VivaCloud is used, we recommend defining access rights using the role in VivaCloud only.

Passwords

In the **Pages** palette, click the desired Alias page in the list and choose **Protect Alias Page** in the context menu if you want to protect the Alias page with a password. The Alias page is displayed when you double-click the name even if you do not know the password, but you can no longer edit it.

Choose **Unprotect Alias Page** in the context menu and enter the password if you want to unprotect the Alias page.

In the **Layers** palette, click the desired layer in the list and choose **Layer Options** in the context menu and then **Lock Layer > Password Protection** if you want to password protect the layer.

Click the lock icon in the **Layers** palette and enter the password if you want to unprotect the layer.

If you forget the password, the Alias page or layer is no longer editable.

Tips for layout templates

Introduction

Restricting the editing options, however, also implies that certain aspects have been taken into account when building a layout, so that later editing is also possible.

With a few exceptions, it doesn't matter whether you built the layout in VivaDesigner or another program (such as Adobe InDesign) and then imported it into VivaDesigner. The process is always the same:

Step 1: – Think about a concept of what editing options you want to give a user for a document. Each document and user role can have different editing options.

Step 2: – Implement the concept in the layout. For existing documents, check whether the concept has been implemented in all points.

Step 3: – Set the editing options for the program, document and/or role in VivaCloud.

Step 4: – Check the functionality of the editing options to ensure that all desired options are available to the user.

General tips

When creating layout templates, always consider what editing options are available to the user. For example, if users

- cannot create their own pages and/or objects, all necessary pages and/or objects must already be available in the document.
- cannot stretch objects, all text objects must be created to accommodate the required amount of text.
- cannot move objects, the layout must be built/adjusted in such a way that the position of dependent objects results automatically.
- cannot make individual markups of texts, all necessary style sheets must already exist in the document.
- also cannot mark up texts using style sheets, corresponding sample texts must exist and already be marked up.

With this in mind, you may need to modify the structure of existing documents without changing the layout. When creating and preparing layout templates, you should always keep in mind that another user

- must be able to find his way around your document without familiarization when editing it,
- has fewer functions for editing the document, depending on the access rights,
- and should only modify the document in the way you intend.

The user will only find his way around your document if he can immediately recognize which functions are available to him. This applies to working with pages, objects, texts, style sheets or images.

Therefore, consider whether it makes sense to allow users to select options such as **Presets** and change **Colors & gradients** or **Style Sheets** at all.

Tips on document pages

- Remove all unnecessary document pages.
- Remove all unnecessary Alias pages, if the user has access to the **Pages** palette.
- Choose the display mode for Alias pages and document pages in the **Pages** palette.
- Optionally protect Alias pages with a password.

Tips on objects and layers

- Delete all objects on the working area to avoid confusing the user.
- Objects that are repeated on different pages and should not be edited can be placed on Alias pages.
- All other objects that should not be edited or printed can either be protected or placed on special layers and locked.
- Alternatively, you can place all objects to be edited on one layer and lock all other layers. In either case, you also do not need to password protect the layer unless you allow the user to select a layer. However, make sure that when you save the document, the layer that you want the user to edit later is also selected.
- Note that not all desktop editions have the **Layers** palette.
- Optionally, choose **View > Visualize Locked Objects** to show the user which objects they can edit at all.
- Optionally, help texts can be placed on locked and non-printable layers. Help texts can also be defined for an object or text using the option **Window > Notes**. When the mouse pointer is moved over the object, the note appears in a tool tip.

Tips for graphic and image objects

- When working with background images, it is often helpful to place them on a separate layer that will be locked later.
- The background images should also be optimally adapted to the size of the image object in order to reduce the amount of data.
- In addition, you should avoid image objects that are placed over a double page if the page is also needed individually. Therefore, such motifs should be composed of two image objects for left and right pages.
- Select the option **Preferences > Pages & Objects > Objects > Embed all used images**. This option is mandatory so that the image data imported by the users is fully embedded in the layout document.
- In many cases, your design will already contain predefined image objects with placeholder images. Users can import their own images into these image objects. When you import a new image into an image object containing an existing image, the scale factor of the previous image is applied. Since you don't know how big these new images will be, this can lead to unsightly effects. Therefore, we strongly recommend using the options **White Space Optimization** and **Fill Frame Automatically**.

These options ensure that there will be no flash between the frame and the image (white space will not appear) and that the images will always fit perfectly into the image object.

- In many cases, there is also the question of whether images can be stretched. Images that have a fixed size should be fixed and not editable in size. In addition, you can use the **Interaction Rules** to determine whether for example an image object can be moved only vertically and/or stretched only vertically.
- If you choose the option **Fill Frame Automatically**, the image will automatically resize itself when the image object is enlarged and will also be enlarged. However, when the image is scaled down, the scaling value is preserved. The user must then use the scaling handle to scale the image object, if it is also available based on the interaction rules.
- Graphic objects should be created as graphic objects and not as empty image objects. Otherwise, the impression is created that images can/should be imported into these objects.

Tips for text objects

- Create appropriate text objects and define which objects may be fixed and which may be stretched. Optionally specify the options for stretching objects with the **Interaction Rules**, **Lock** and/or **Protect** options in the **Object** menu.
- Consider a concept for sample texts. Check whether you already fill the text objects that the user is to edit with sample texts and how you want to mark them up. Keep in mind that all texts that the user does not delete or revise will be output later.
- Choose **Text > Character Options > Options > Placeholder Text** if you have entered a sample text that should be selected completely with one mouse click. The option is applicable to any character.
- Consider a concept for a dynamic layout. Check if the layout adjusts automatically when the user enters more or less text:
- Headings and a text following them should not be entered in separate text objects if the length of the heading is variable.
- Images should be anchored in the text if the position of the image depends on the amount of text.
- If texts are to be framed, a separate text object is not always necessary. Alternatively, you can also define a background and/or a frame with any text.
- Select GREP styles and/or nested styles if the user's input is to be automatically marked up according to a certain pattern.
- Images and texts can be placed in tables with a fixed height, so that the height of the images adjusts to the amount of text. To do this, you need to set the line height for texts to **Auto** and the line height for images to **100%**.

Tips for style sheets

- Use style sheets to mark up text if you want the user to mark up text using style sheets only. Using the **View > Visualize Text Style Sheets** option, you can quickly check which texts have been marked up with style sheets.
- Use style sheets to mark up objects as well. This allows you to quickly adjust all objects afterwards.
- Use style template names that identify the function. Names such as "Headline", "Body text" are more useful than "Arial-12/14".

- If possible, use the style sheet names predefined in the program if the document should be used in different countries. These names are automatically translated by the program when the program language is changed.
- Create paragraph style sheets for **left justified**, **right justified** and/or character style sheets for **bold**, **italic**, **superscript**, **subscript** if such attributes are to be used in the text and if the **Module** palette is turned off.
- Consider whether users should have the right to change style sheets.

Tips for fonts

- Choose **Preferences > Embedded Fonts > Embed All Used Fonts**. This option is mandatory if the document is edited on the web or on operating systems where the fonts used are not installed.
- Choose **Preferences > Embedded Fonts > Disable System Fonts** if you do not want users to select other fonts, provided they have permission to select fonts in principle. This option is not mandatory, but is recommended for security reasons, even if users can only format text using style sheets.
- When opening documents, all fonts must be available.
- Missing fonts can refer to the text, style sheets or settings in presets, even if they are not used.
- VivaDesigner may display missing fonts even though they are actually installed in the system. This can be the case if these fonts originate from a different operating system and the naming is interpreted minimally differently under the current system. In some cases, fonts in InDesign and in VivaDesigner have slightly different font names, which can lead to the message. In these cases, follow the instructions in the dialog and replace the fonts accordingly.
- If you do not want to install the missing fonts in the system, you can also drag and drop the respective font individually onto the document. The program will provide feedback if the font was imported successfully. However, this requires that the option **Embed All Used Fonts** is selected.
- When you open an InDesign document, for technical reasons, missing fonts are not displayed until the document is saved in VIVA format and reopened.

Tips for imported templates from InDesign

You can also use existing InDesign documents as templates. Basically, the same rules apply to InDesign as to the program, provided that these options are also available in InDesign. For more information, please refer to the section **Exchange with InDesign**.

