Template Composition: Admin Training

FPO Placeholder

Introduction to tagging

CampaignDrive allows administrators to create a special type of template called a “dynamically sized” template that will give end users the ability to create custom-sized documents from a single experience. A dynamically sized template is ideal for posters, newspaper and magazine print ads, where the media size for a given ad differs from publication to publication.

A dynamically sized template works by using a set of templates, called “library templates” that determine the layout for the custom-sized document. A set of parameters, called “sizing rules” are applied to each text or image layer on the template to determine how these layers adjust in response to the change in size of the document.

For the Administrator: The template composer creates a set of library templates, each with specific rules for how the elements on the template should move/resize based on brand guidelines and design rules.

For the End User: The end user inputs a custom ad size. The system will then automatically resize an existing library size to the user’s custom size based off of the rules defined by the composer. Click here for documentation on the end-user experience for dynamic templates.

The steps to making a dynamically sized campaign:

1. Creating library templates
2. Upload and install library templates
3. Add the library templates to a Campaign
4. Test as an end user

Creating Library Templates

Library Sizes

There are 2 steps to creating a set of library templates. The first step is to determine the set of library sizes that will best fit the intended use. We recommend looking at the dimensions of common materials that will be made using this dynamically sized template and using that as a base to start. Here are some basic guidelines when deciding on template dimensions:

- Library templates always size UP, never, down, so it is best to create library sizes just under the common document sizes (Ex: If a common document size is 3.25”x6.125”, a good library size would be 3”x6”).
- The smallest document size available is the dimensions of the smallest library size.
- The recommended scaling between library sizes is 120% of the dimension with a max recommendation of 150%. The system will give a warning message for dimensions more than 150% (Ex: If width is 4”, the next library size should be no more than 6” in width (150% of 4”). It is best to have some overlap before the next size.
- If you have proportionally very tall or very wide documents, it is possible that you could need additional library sizes.
- LIbrary sizes may need to be adjusted, or additional sizes created, to account for content changes, typically in the mid-range sizes (see section below on designing for more information).
- Pica9 recommends having at least 7 library sizes installed, although a dynamic template can be created from as few as a single library template.

Here is a sample set of library sizes. This set can be used as a starting point and then adjustments may be made either upon testing or during use to improve range performance. This size range will allow documents as small as a business card and up to a tabloid poster (11” x 17”) and also allow for horizontal layouts.

3.5 x 2 | 4.25 x 5 | 3.5 x 7 | 6.5 x 4.5 | 7 x 10 | 8.5 x 11 | 11 x 10 (dimensions are in inches).

Library Templates

Once the library sizes have been set, create design layouts (library templates) to correspond to your library sizes. Follow the IDML Import Guidelines when creating your files. Click here to access the IDML Import documentation. Here are some guidelines and recommendations when creating your templates:

- Use best design practices when designing each size, following smallest font size recommendations, etc. This is important if you start from the largest template and work down, as it is common to see designers just reduce size and end up with fonts and graphics under minimum recommendations.
- Each template does NOT have to be identical and/or have identical information. In fact, it is best to approach each size separately and design each appropriately for its size. However, remember that, to the end user, it is the same document, so relationship consistency is important (Ex: relationship to font size and leading within and across text elements).

- The creation of a “Master” template can help ensure consistency between library sizes. However, don’t just reduce the size of the master to make the new sizes.
- If there is a lot of text in larger ad sizes, check your library sizes to see where there is room for the additional text - this might be where an additional library size is needed.
- Since templates scale UP, the recommended resolution for an image uploaded with a template is 450 ppi (300 x 150%). If an image will be used in multiple library sizes, an easy way to guarantee print quality is to create a template at 150% of the largest library size, adjust the image to the desired crop and then save out the ENTIRE image at that size (not just the cropped version), ensuring that it is at least 300 ppi at that size.

Upload and Install Library Templates

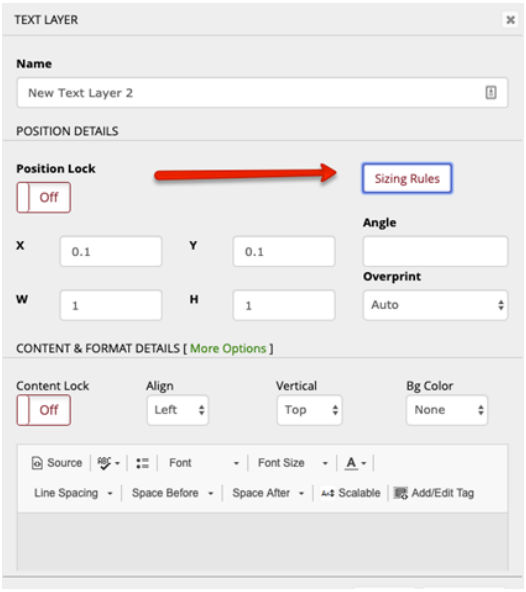
The upload and installation of library templates is exactly the same as any other template. Content management can be applied to these templates just like any other including content groups, content links and section styles.

Master Templates

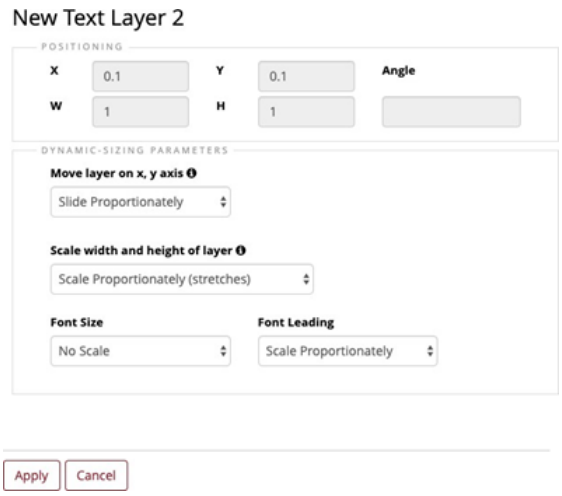
Upload each library template using IDML import. Click here to review this procedure. Complete any content management needed for text and images. The next step is to assign sizing rules to each layer in the template.

Assign Sizing Rules

Sizing rules are parameters that will determine how a layer will change position (translate) and size (transform) as the template grows. For both text and image layers, sizing rules are accessed by clicking the “Sizing Rules” button in the pop-up.



Depending on whether the layer is text or image, there will be slightly different options shown, however, there will always be options for translating the layer (moving it on the x and y axis) and transforming it (how it changes in size). Here is a sample of a basic text sizing rule pop-up:



Sizing Rule Definitions

Options available for both text and image layers:

Translation Rules - Move Layer on X, Y axis:

- **No Slide**: Layer does not move
- **Slide Proportionately:** Moves layer to a new X,Y position proportional to the document's resized dimensions (default setting)
- **Slide Width Proportionately**: Moves layer to a new X position, proportional to the document's resized width (Y position will not change)
- **Slide Height Proportionately:** Moves layer to new Y position, proportional to the document's resized height (X position does not change)
- **Keep Margin With**: Maintains the distance between a reference point (that you select) of the layer and the reference point (that you select) of another layer or element.
- **Keep Alignment With:** Aligns the selected reference point of the layer with the reference point of another layer or element.

The Slide options move the layer with respect to the upper left corner of the document page and this movement is independent of any other layer. The Keep Margin With or Keep Alignment With options adjust the layer in relation to another layer or document reference point. You will need to choose which element or layer to bind your current layer with and the reference point within that second element. The Bind To option will include all layers that currently exist in the document and elements that are standard to all documents (Media Box, Art Box, Trim Box and Bleed Box). Click here for an explanation of these elements.

Transformation Rules - Change size of layer:

- **No Scale:** Layer size does not change
- **Scale Proportionately** (stretches): Resizes layer to a new width and height proportional to the document's resized height (default)
- **Scale Width Proportionately:** Resizes the layer's width, proportional to the document's resized width. The height will not change
- **Scale Height Proportionately**: Resize the layer's height, proportional to the document's resized height. The width will not change.
- **Scale Constraining Aspect:** The layer will resize and keep the same aspect ratio (relevant height and width). Always use this setting for logos. This setting can be useful for text to preserve a headline appearance as the document grows. This setting will also preserve the relationship between font size and leading.

Image Layer-Specific Rules

- **Scale Proportionately with Crop:** Resizes the image, while maintaining the original aspect ratio and crops the image based on a set position. When choosing this option, you will need to set the crop position as a guide when auto-cropping the image. The crop position specifies where the crop originates FROM (Ex: Setting crop to "Top" means that the bottom of the image will be cropped).

Text Layer-Specific Rules

Text layers have additional settings that determine how the font and font leading grow as the template re-sizes. These settings are independent of the re-sizing of the layer box they reside in.

Translation Rule:

- **Keep Margin With Proportionally**: Maintains a proportional distance between a reference point (that you select) of the layer and the reference point (that you select) of another layer or element. This applies to the text box.

Transformation Options for Font Size: Defines how the font size should grow. These settings apply to the text itself, not the text box.

- **No Scale:** Font size does not change
- **Scale Proportionately:** Font size grows proportional to the resized layer that it resides in. If your layer's transform is set to "No Scale" the font size will not change. This setting can cause font size to grow faster than layer box re-size, so check this setting carefully in testing.
- **Scale Constraining Aspect:** Causes the font and leading to grow but maintains the relationship between the font size and leading.

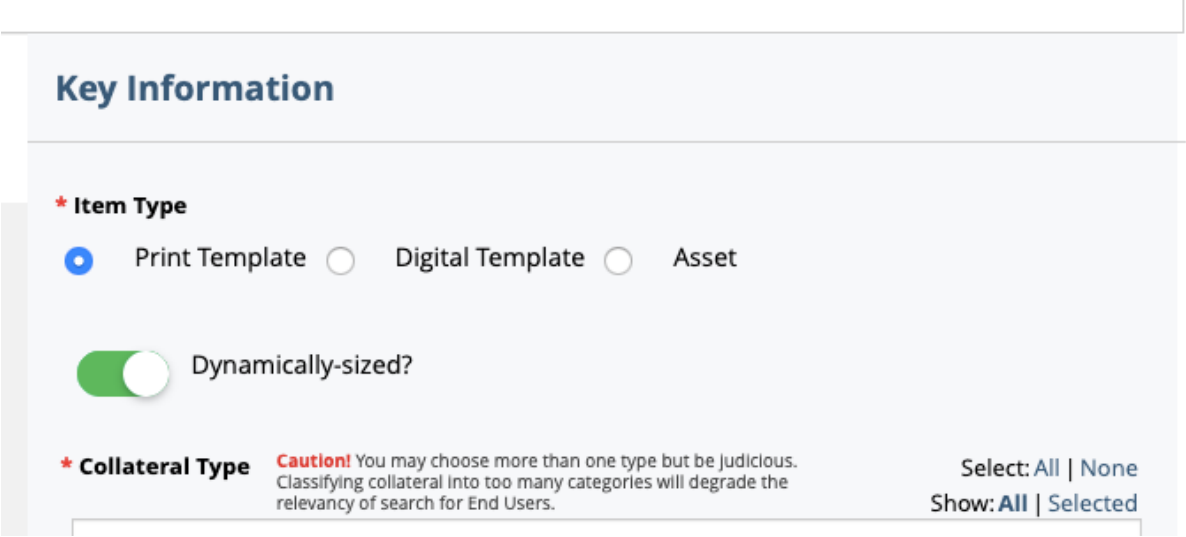
Font Leading: Defines how the leading should grow:

- **No Scale:** Font leading does not change
- **Scale Proportionately:** Font leading grows proportional to the resized layer that it resides in. If the layer's transform is set to "No Scale" the font leading will not change.

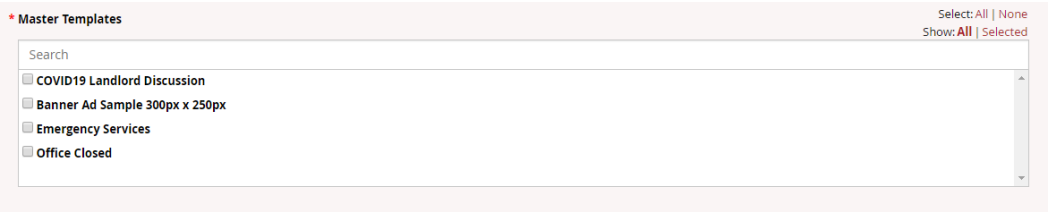
Adding Library Templates to a Campaign

The process of adding a dynamically sized template to a campaign is very similar to adding any other template. If you are unfamiliar with adding templates to a campaign, click here for detailed instructions on this process. Click on the "dynamically sized" switch to activate the feature. This alerts the system that this is a dynamic template. This MUST be done when the template is first

added to the campaign.



Once this switch is active, the "Master Template" selection becomes a drop-down and you can select from multiple templates instead of just one. At least one Library Template must be added when the dynamic template is created. Other library sizes may be added later, as long as the first template is activated as a dynamically-sized template.



End User Testing

It is important to test the behavior of the dynamic template once all library sizes have been uploaded. This needs to be done from the front end. Systematic testing will show how the templates behave with content management, as well as ensuring the sizing rules are producing the desired results. We recommend the following tests at a minimum, and in this order:

- Test each library template at the original size. This will find any obvious issues with sizing rules
- Test each of the most common sizes that will be used for the template
- Test each template at 150% of its width and the original height

- Test each template at 150% of its height and the original width
- If 150% takes the template into the next library size, test just under the next size, whatever that is (Ex: the width of a template at 150% is 6", but the next Library size is 5.85". Make the width of the test 5.84" instead).

Tips for Dynamic Templates

- If you are new to sizing rules, or are using a rule you are unfamiliar with, setting up a "testing" template in a campaign hidden from end-users can help with how each sizing rule works.
- It is also helpful to install one template first to test behavior before installing all of the library sizes. This can help find errors in sizing rules early
- It also isn't necessary that the sizing rules "match" for each template in a library set. Sometimes a rule that works for a layer in one template doesn't work for that layer in a different template.
- Part of the "designing" of a dynamic template involves the re-sizing of components. This is different from a static template. Elements such as logos, disclaimers and other text boxes need to maintain correct layouts as the template grows, which means having consistency across library templates. Sometimes these changes are obvious, but other situations might not be obvious, or there might be conflicts between layouts (where the relationships aren't consistent between library templates). This might require going back to the designer or agency for clarification.