Lucidpress

User Guide

Version 1.4 · 7/20/20

Northeastern
ILLINOIS UNIVERSITY

This is your Lucidpress user guide.

First, let's talk about the Division of Marketing and Communications, and why we have incorporated Lucidpress into our design and production process.

The division's primary responsibility is to attract external audiences to the University. Most of that audience is made up of prospective students, but can also include donors, alumni and the surrounding community. With a growing workload and increased emphasis on external outreach, this effort has led to a shift in how we are able to focus on internal communications. With the introduction of the University Events Calendar, the need to promote internal events drastically increased, as well as the need for more variety. Introducing Lucidpress!

NEIU's internal community now has access to templates designed by our team for ease in creating materials for event-based or departmental needs. The current designs on our Download Templates page at **neiu.edu/brand** have been moved over to Lucidpress. Our brand site still exists, but our Download Templates page will now give you access to Lucidpress.

Why Lucidpress?

Lucidpress is a web-based publishing platform. It allows users—regardless of access to Adobe Creative Suite—the ability to create documents quickly and easily.

To gain access, users log in to the Lucidpress website and choose a pre-loaded, branded design. All designs allow for editing of copy and images, and some even have color variations.

Users will no longer need to submit project requests for projects that can be fulfilled using this new software.

The Division of Marketing and Communications still reviews and approves all content and design within the software, but turnaround time is much quicker as the designs are already branded.

Once submissions are approved, users have the ability to save PDFs of their design and print on campus, with an external vendor or directly through Lucidpress.

Users can create single and multi-page documents, and direct mailers, such as:

- Flyers and posters
- Business cards
- Letterhead
- Brochures
- Newsletters
- Postcards and more!

Over time, the options will grow as we add more designs.

Getting Started

How to access Lucidpress.

There are a limited number of licenses for this software; selected representatives from different areas of the University hold the account names. Contact the representative from your area to access the email and password.

Once you have your login credentials, access Lucidpress through **lucidpress.com**, or find the link on **neiu.edu/brand**.

Below is what your login screen will look like. Enter your credentials.

Please note: Lucidpress is only compatible with Google Chrome.

Current Lucidpress pilot user list:

- Institutional Advancement/ Alumni Relations
- Enrollment Services
- Department of Music and Dance
- Cultural Events/CAPE
- Institutional Research
- College of Graduate Studies and Research
- College of Arts and Sciences
- College of Business and Management
- Daniel L. Goodwin College of Education
- Student Union, Event and Conference Services
- Library System
- Pedroso Center/Student Leadership Development
- Campus Recreation
- El Centro
- CCICS

This list is subject to change. Refer to neiu.edu/brand for the latest user list.

www.lucidpress.com

Lucidpress

Log in to Lucidpress

Email address

Log in with Password

Next

or sign in with

Google   Office 365

YAHOO!

☑ Remember me

Already have a Lucidchart account? Log in to Lucidpress with your same username and password.

New to Lucidpress?

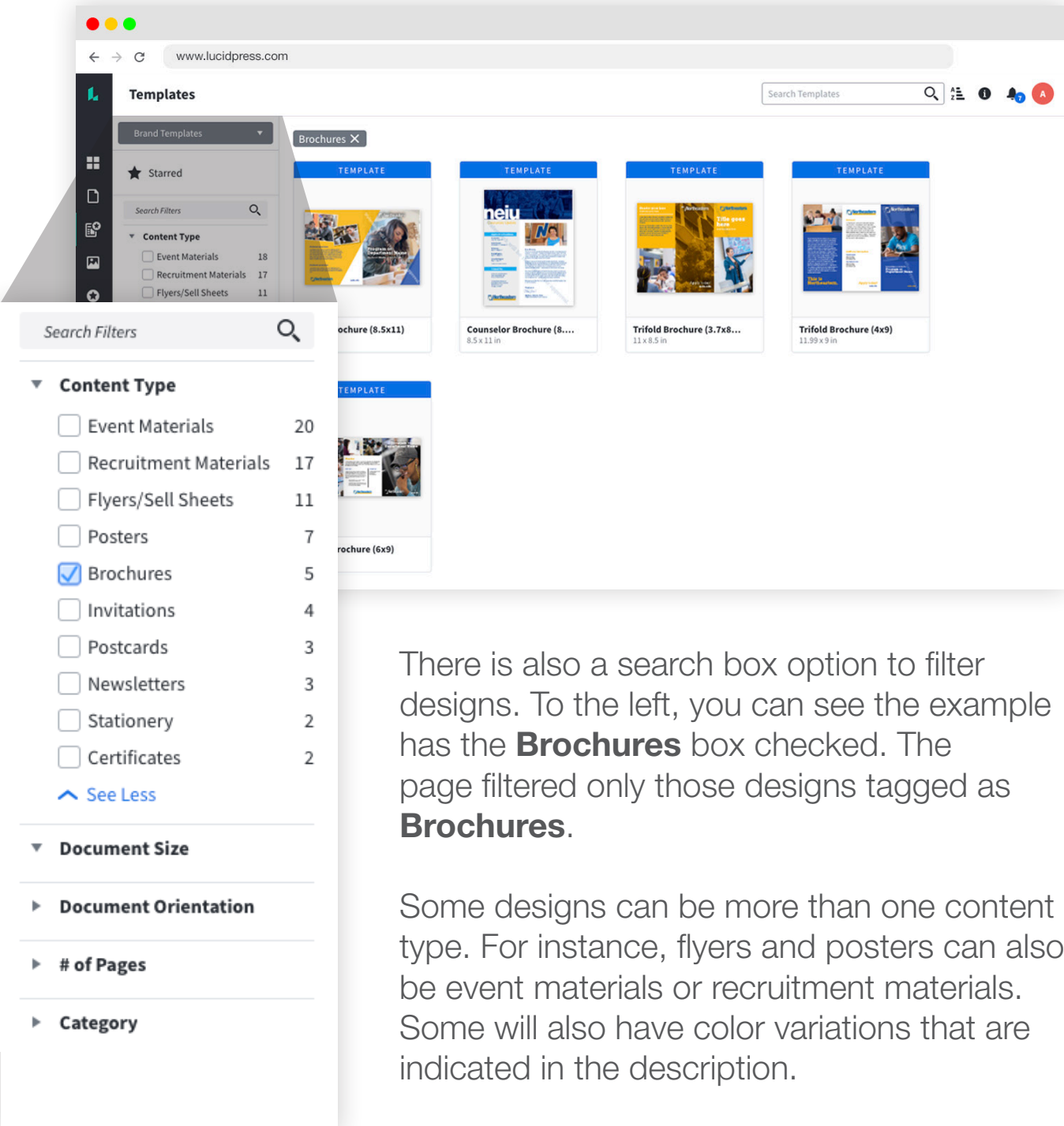Set Up Free Account
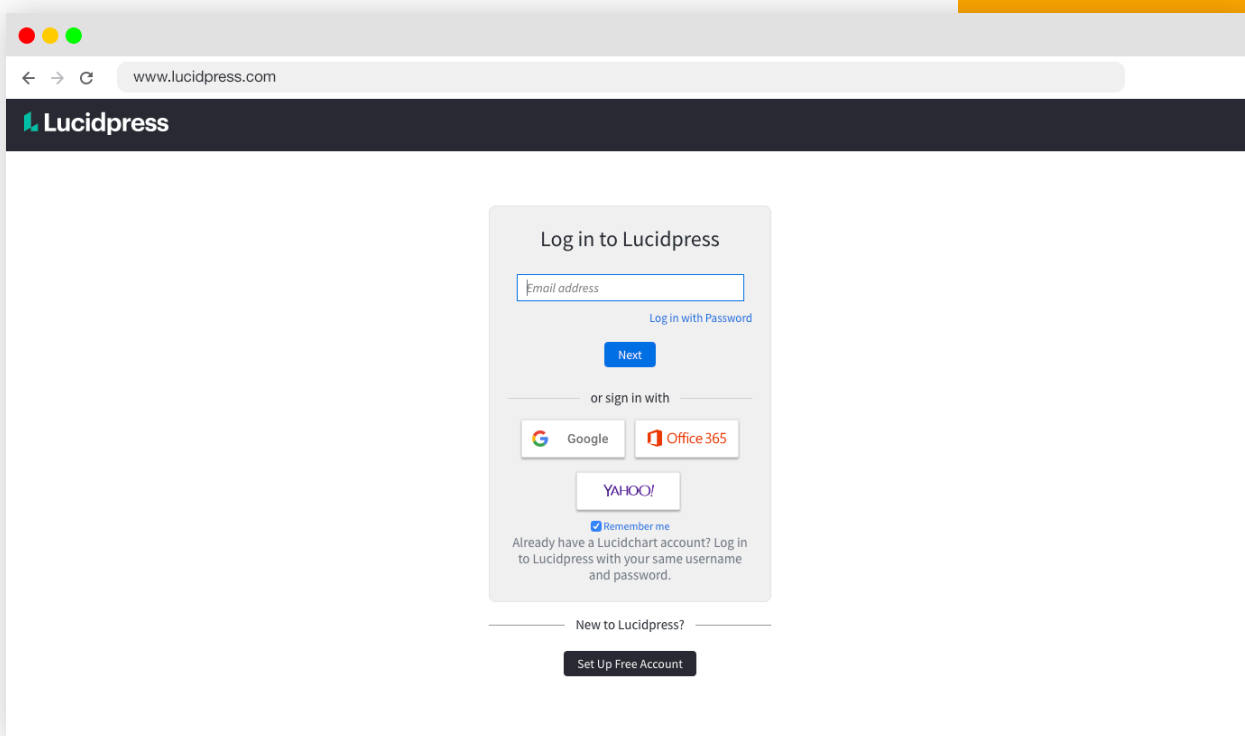
This is your dashboard.

When you log in, you will see a screen that looks similar to what is shown below. From the dashboard, you can access recent designs you have edited, click the green box to access all your own personal documents, or click the blue box to go to **Templates**.

The left side of the dashboard is your navigation. As users, you will access only **Home, My Documents, Templates, Images** and **Cart**. You will find branded designs in Templates. The branded designs you have begun editing will be in **My Documents**. Preloaded images and images you upload yourself will be in **Images**. If you printed your final documents through Lucidpress, you will find order details in **Cart**. If not, disregard **Cart**.

How to find and filter designs.

When you are in the **Templates** page, you will see a filtering option on the left side of the page. This option allows you to filter design options by content type, document size, document orientation, number of pages, and category. Filtering by content type is the best option to quickly find what you are looking for.

There is also a search box option to filter designs. To the left, you can see the example has the **Brochures** box checked. The page filtered only those designs tagged as **Brochures**.

Some designs can be more than one content type. For instance, flyers and posters can also be event materials or recruitment materials. Some will also have color variations that are indicated in the description.

Saving your chosen design.

Once you have selected your design, click the **New** button on the template and it will open a box to save your document. Rename your document and select the folder you wish to save to. Users who share login credentials can set up folders within **My Documents** that correlate to your area.

To save your design, use the dropdown menu to save under **My Documents** or a folder you created within that location.

If you log out and log back in to continue editing, go to **My Documents** to find your saved files.

Editing a Design

Getting familiar with document menus.

Once you've saved your document and picked the folder location you want to save to, you can begin editing the design. You will see two menu options. The first is the top menu bar (below) with options similar to what you find in a Word document (**File, Edit, Select,** etc.). You will also find buttons to **Share** the document and to **Request Approval**. That button will change to **Order Prints** once the document has been approved, and the **Download** icon will appear next to the share button.
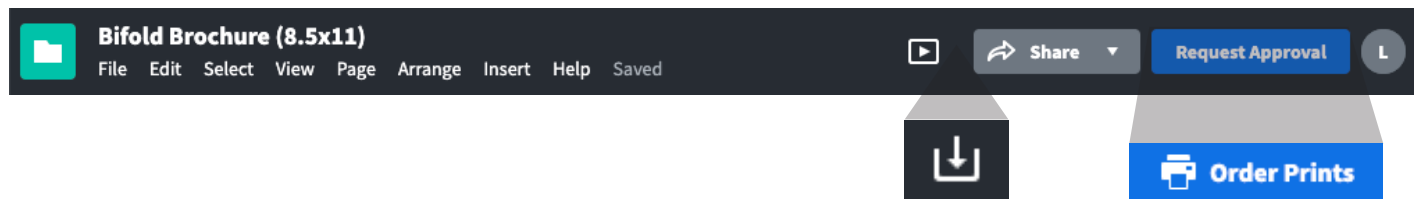

There is a menu on the right side of the screen that changes depending on what editable area you have selected. Those tabs are **Document, Text, Shape, Image** and **Layout**.

You will see a **Document** menu appear when you first open the design and have nothing selected to edit. These options will be locked, but allow you to see the size of the document and the margins.

To the right is an example of the **Text** menu. This tab will appear when a text box you wish to edit has been selected. Within this tab are various options for how you can change and edit text.

We will get into more detail about the other menus later.
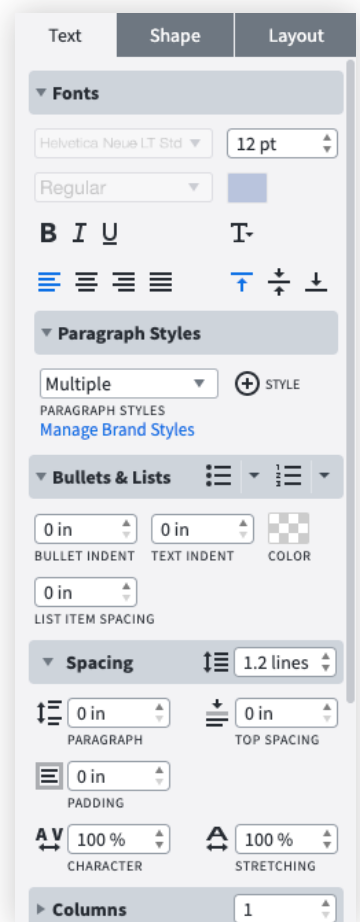
Checking the document for notes.

Before you start editing, check the design for **Notes**, which have suggestions or instructions on certain elements. Those notes can tell you how to change the date and time, how to write something according to editorial standards, suggest changing a URL to a vanity URL, or identify color variations within the document.
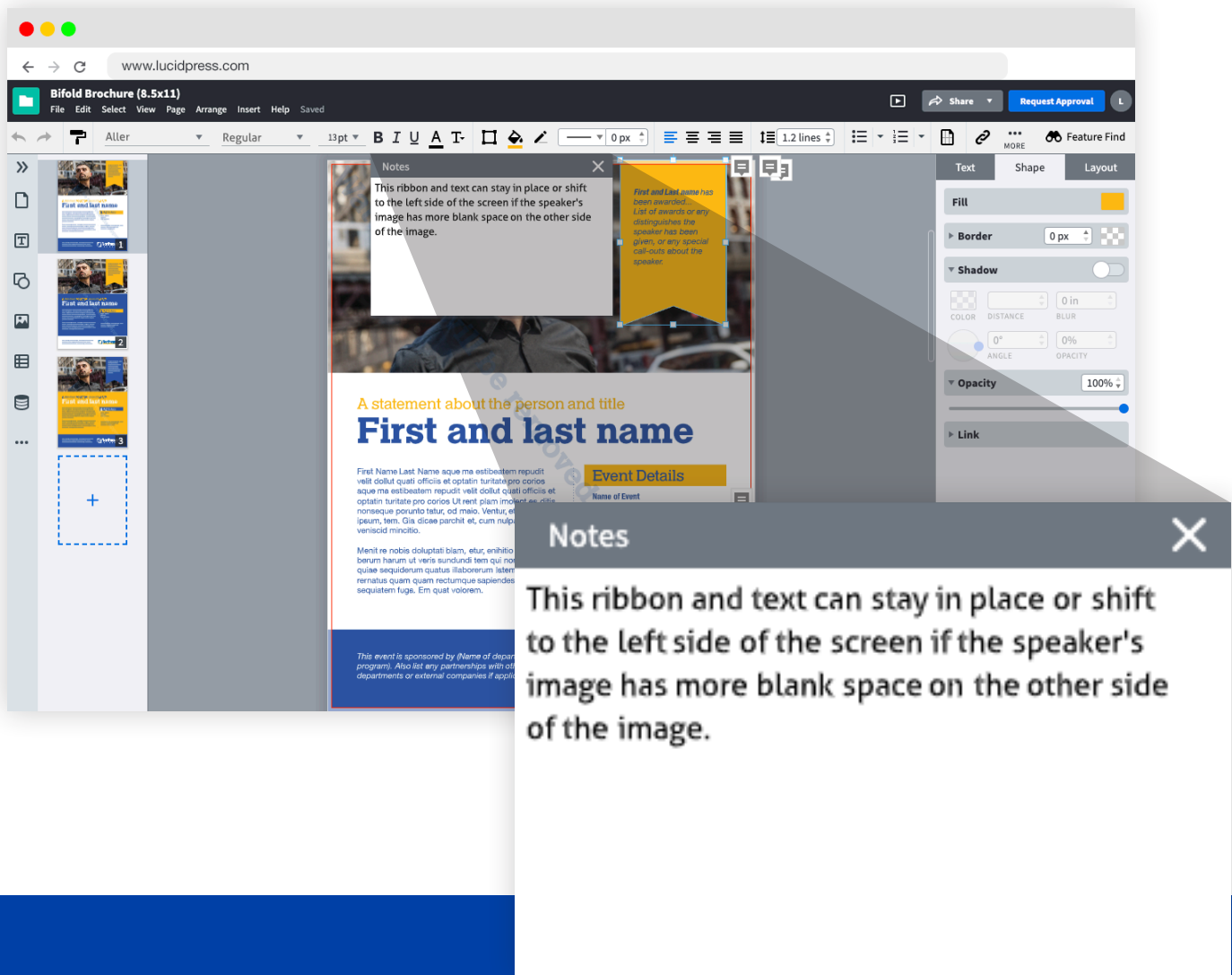

This icon will appear when there is a **Note**. In the example above, you can see a **Note** for the yellow ribbon was clicked. Once you click to open the **Note**, the note box will appear near the object. You can close the note box once it has been read, but you cannot delete it.

Checking the document for variations.

After you read all the notes within the document, you will choose a variation (if available). If you selected a single-page document, such as a flyer, poster, sell sheet, etc., you may see more than one page in the document. You can either scroll down to see the variations, or you can click one of the thumbnails on the left side of the screen.

When you select the variation you would like to use, you can delete the ones you do not wish to use. You are free to skip this step; the approvers will know what variations to delete when you submit for approval.
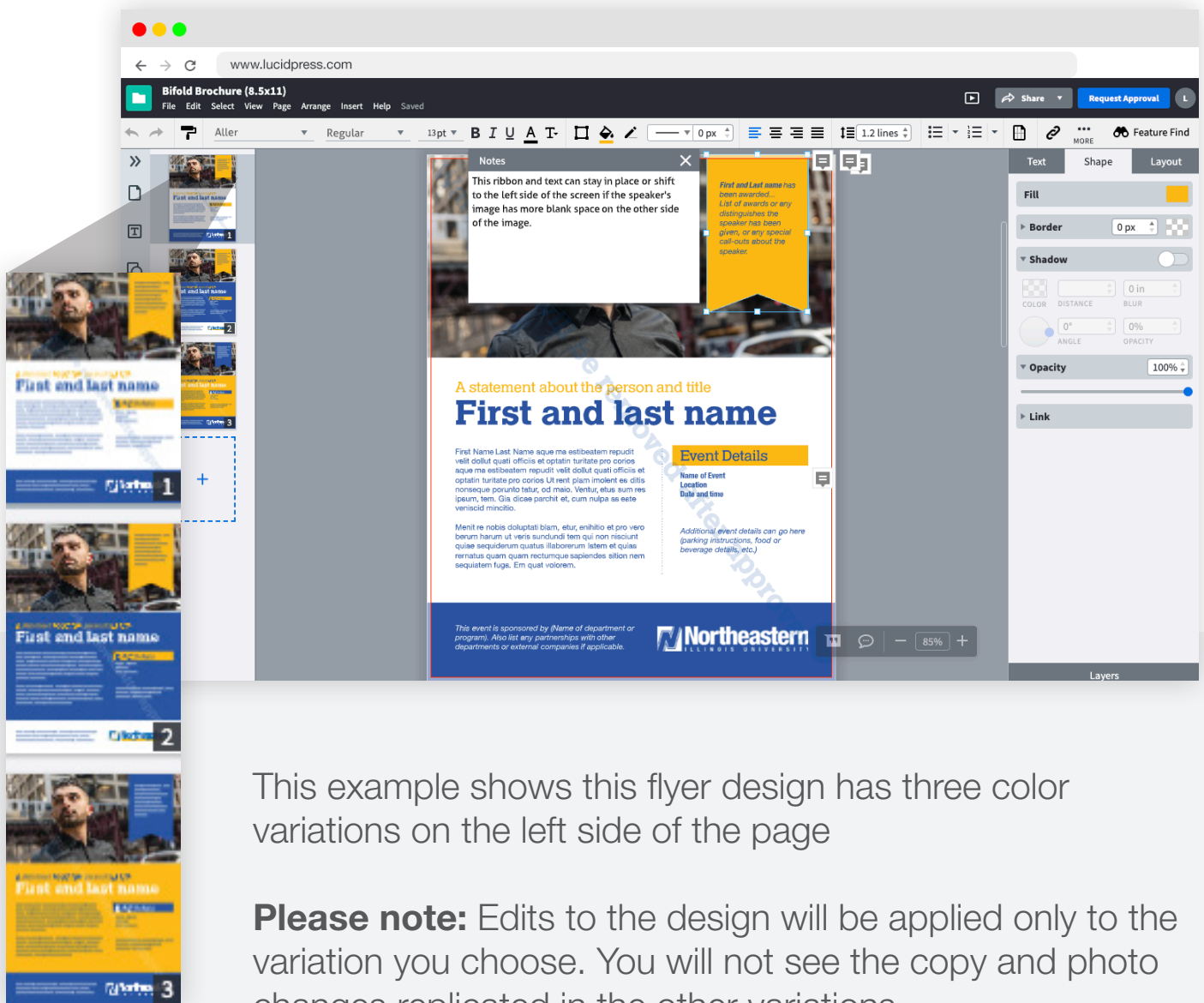
This example shows this flyer design has three color variations on the left side of the page

Please note: Edits to the design will be applied only to the variation you choose. You will not see the copy and photo changes replicated in the other variations.

Understanding locks.

Throughout the design, you will notice certain elements will have locks on them—either a yellow lock or a red lock. The color of the lock indicates whether that element can be edited or not.

Yellow locks indicate editable areas, such as content blocks and photos.

Red locks indicate non-editable areas, such as the University logo and color blocking elements. In some instances, blocks of content may be locked down due to the font type or personality-driven verbiage that should not be changed.

This example shows a content block with a yellow lock. This text is editable.

Learn more about locks

Editing copy.

All content blocks that are editable have been pre-loaded with our University fonts. To ensure brand standards, the font selection cannot be changed. In most cases, users are able to change the size of the font, expand the size of content blocks, and shift content blocks up or down. If users wish to create or map out content before editing a design, it is best to use a text only program, such as Google Docs, Notes (Mac users) or TextEdit (PC users), and then copy and paste the text into the content blocks.

To edit copy, double click the content box. The border of the box will change from yellow to green. Green means you can now edit. The menu on the right side of the screen displays the **Text, Shape** and **Layout** tabs. Select the **Text** tab to change the size, change content alignment (if desired), add a bulleted list, adjust spacing or create multiple columns.

As you enter your content, whether changing a header or body copy, you may see a small box (⊞) appear with a plus sign in the middle. This means your text is longer than the content box. You can click the cross to reveal the rest of the copy (automatically resizes the content box), reduce the font size or edit to reduce the text length.

The **Shape** tab allows users to add a drop shadow to text, or adjust the opacity of the text.

For more advanced users, the **Layout** tab allows you to rearrange the layering pattern of content, align content shapes, and use text wrapping.
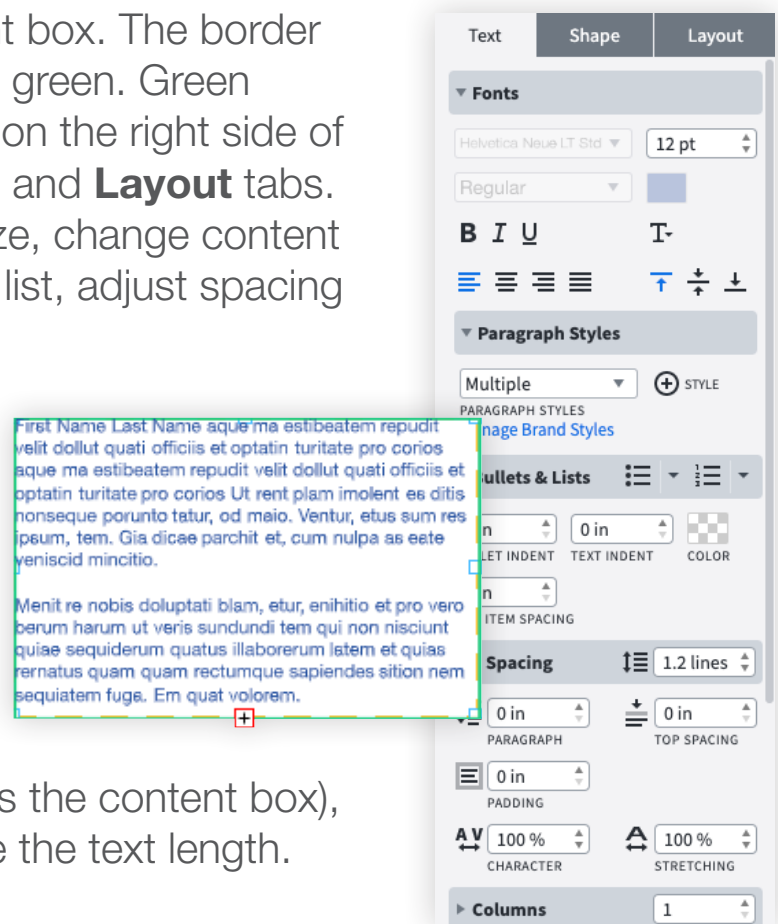
Changing an image.

To change an image, double click the image and the Image Manager will pop up. A collection of pre-approved images has been uploaded to select folders. To select an image from one of those folders, click **Shared With Me**, and you will see folders with academic, campus, duotone, and student life images. Double click the image to insert.

You can also upload your own image by double clicking the image and clicking the **Upload Image** button.
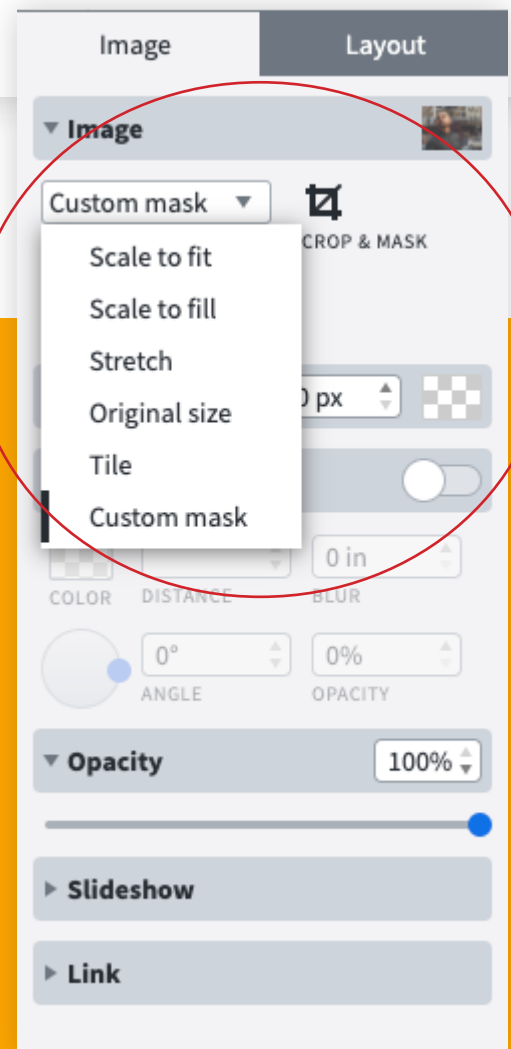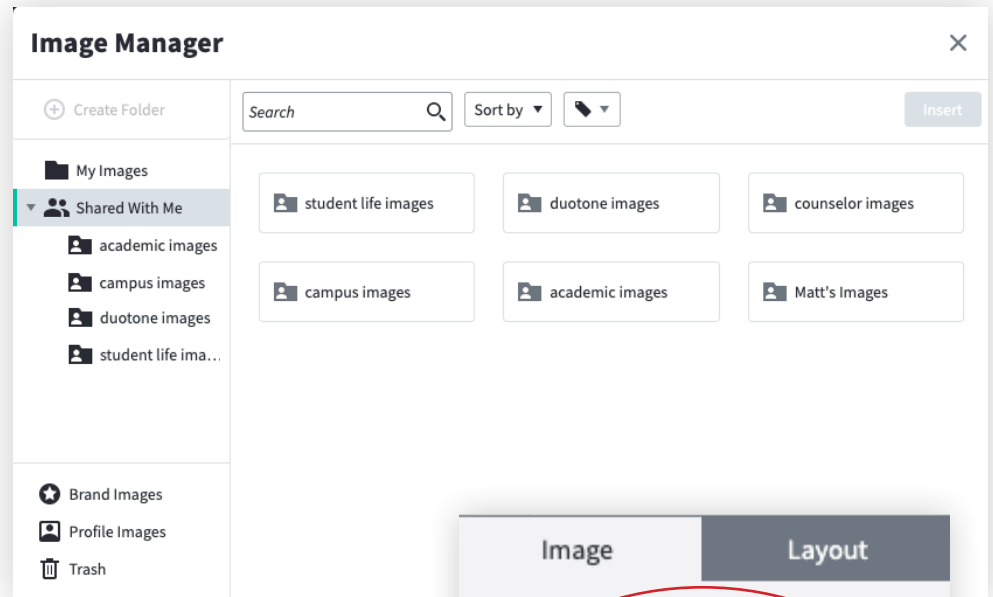
Once the new image has been placed, you may need to size or crop the image to fit. The **Image** and **Layout** tabs will appear in the right-side menu. There is a dropdown menu under **Image** with sizing options. If the image does not fill the shape, select **Scale to fill**. You can also choose **Original size** and then click the **Crop & Mask** icon to resize and shift the image to your liking.
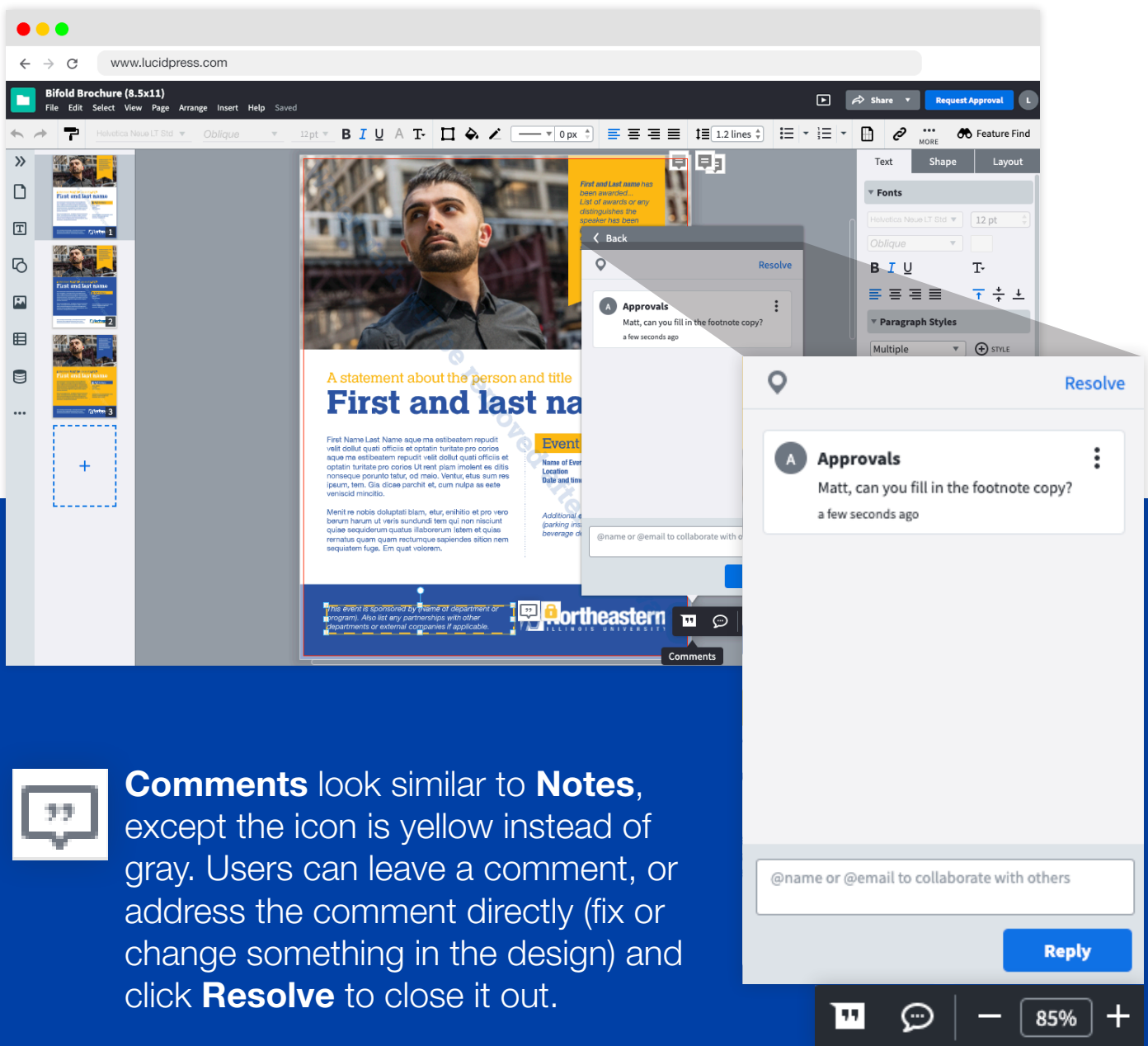
Learn more about images

Adding Video.

Only the **Digital Newsletter** design has the capability to add video, simply because that is the only digital format option that is currently offered within Lucidpress. In several spots within the newsletter is a YouTube video placeholder. To change the video, click the placeholder video and a **Video** tab will display in the left side menu. Copy and paste the desired YouTube URL and Lucidpress will automatically replace the placeholder image.
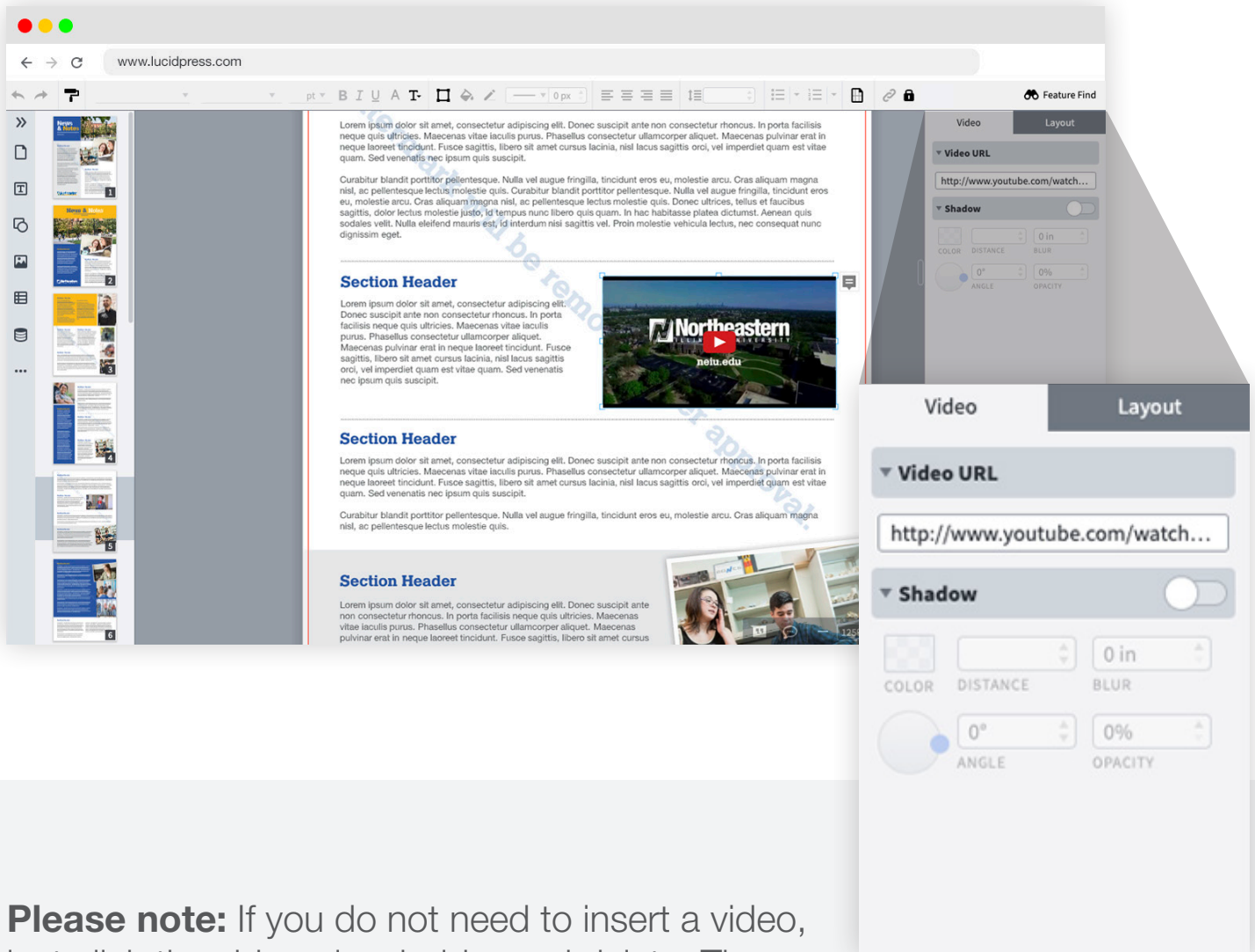
Please note: If you do not need to insert a video, just click the video placeholder and delete. There is an image placeholder underneath that can be changed to a new image instead.

Leaving Comments.

Some users will need to collaborate with colleagues to finish designing a document, or to get input on content prior to submitting for approval. Toward the bottom of the screen, you will see a menu that has the **Comment** icon. Select the content you want to comment on, and click the icon to open the comment box.


Comments look similar to **Notes**, except the icon is yellow instead of gray. Users can leave a comment, or address the comment directly (fix or change something in the design) and click **Resolve** to close it out.

Learn more about comments

Sharing with Colleagues.

Another way to collaborate with colleagues is to share the document. Users may also wish to share with someone who may not have access to Lucidpress, but still needs assistance in finishing a document. In the upper right corner is a **Share** button that allows you to **Collaborate with Others**.
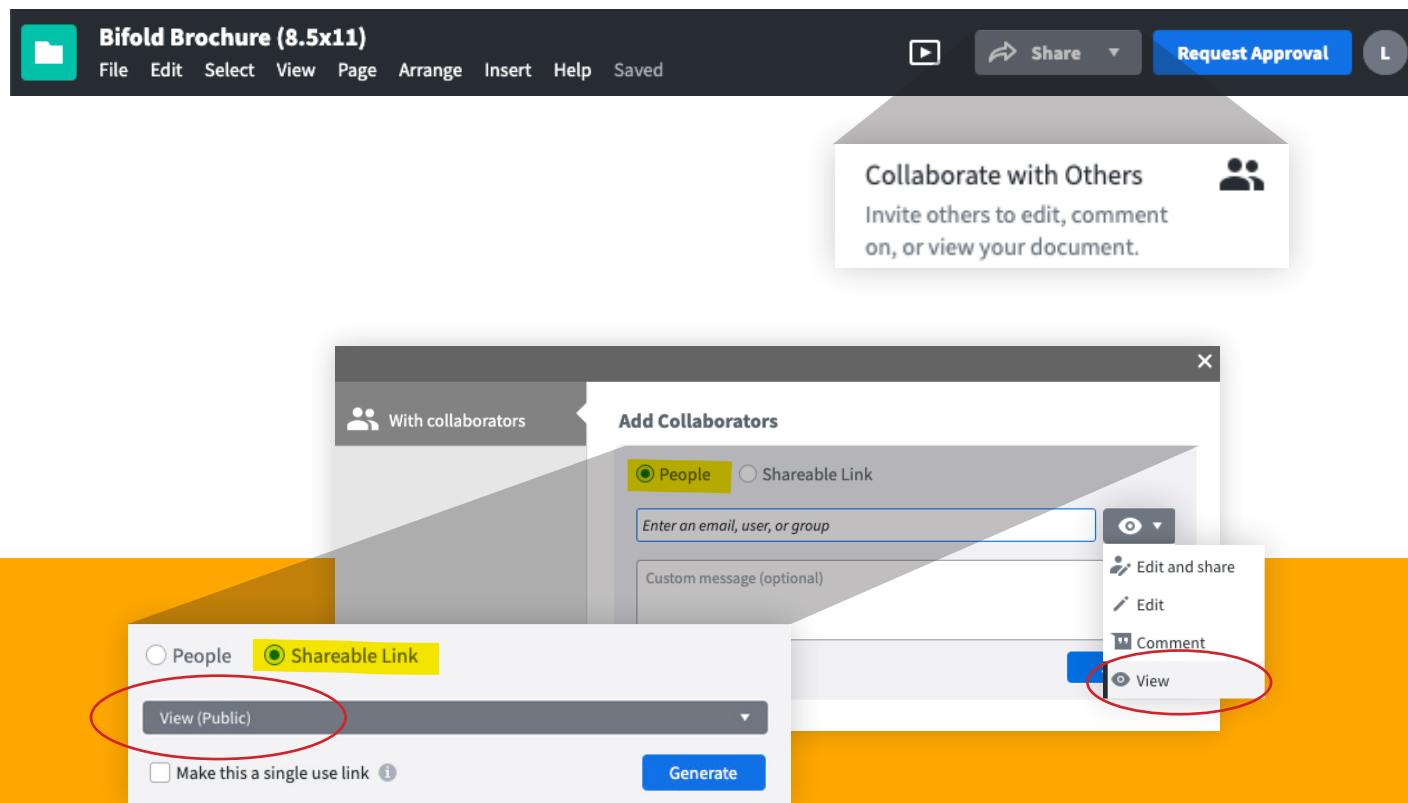
There are two options for how users can share the document. Users will be asked to add collaborators via **People** or **Shareable Link**.

The **People** option allows you to invite other Lucidpress users by entering their username, or non-Lucidpress users by email. Select **View** from the button next to the email before sharing.

The **Shareable Link** option allows you to share a direct link to the document. Select **View (Public)** from the dropdown menu and generate the link. Copy and paste into email and send to multiple people at once.

Approval Process

Turnaround Time.

Lucidpress has a faster turnaround time than the former project request process. The templates are already pre-approved from a design standpoint. Once a user begins to edit the design, approval will be dependent on copy and image replacement.

However, this does not mean users can create last-minute designs and expect same-day approval. It is still important to plan ahead, especially for event-based designs.

Approval will not be immediate, but depending on when the user submits their design, it could have approval within a week. Approval is also dependent on content readiness and appropriate usage of imagery.

> *Personal photography or video added by the user from a private collection may be removed if it does not follow brand guidelines.*

Photography guidelines

Lucidpress may shorten the approval process, but users should still keep timing in mind. Please remember, the following can affect timing:

• Content should be accurate and ready to go.

• Imagery must meet brand standards.

• Allow time to obtain final approval. *Approvers may reject the document and direct users to make changes to copy or imagery.*

• If using an external vendor, allow time to secure a purchase order.

• Allow time for printing with an external vendor (typically two weeks after they recieve the purchase order)

• If printing with Lucidpress, allow at least two weeks for turnaround.
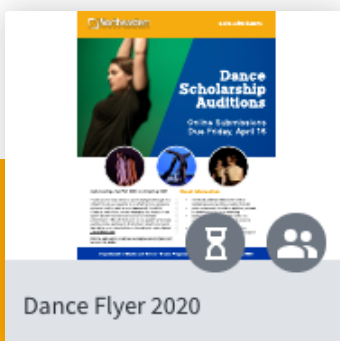
Submitting for Approval.

When users are ready to submit for approval, click the blue **Request Approval** button in the top menu bar. A window will open with two options for where to send your document. Select **Submit for Approval** to send to approvers.
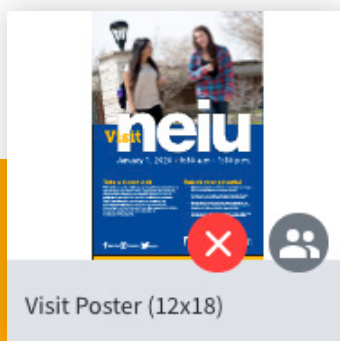

If users have any questions for approvers, or had trouble editing a specific element, they can leave a comment in the comment box in the **Request Approval** window before submitting the request.
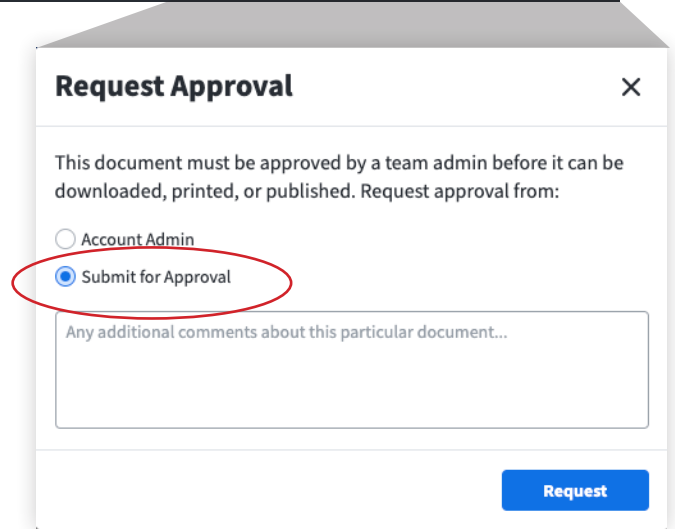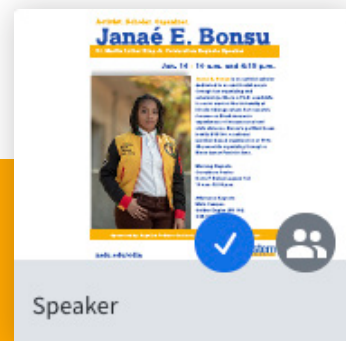
Please note: If submitting a postcard design, please use the comment box to indicate the type of indicia you wish to use. It will be added by approvers.


After submitting for approval, your document will display an icon that indicates where your document stands in the approval process. The **gray hourglass** means the document is awaiting approval, the **red X** means the document was denied and needs changes, and the **blue checkmark** means it has been approved.

Final Approval.

Once a document is submitted for approval, approvers will make edits to copy for grammar, punctuation and clarity and adjust photos that need cropping or alignment. Users are responsible for verifying dates and times (where applicable) and ensuring information is correct and up-to-date.

Users are also responsible for updating photography (if rejected for not meeting brand standards) when selecting imagery from a private collection. Approvers may suggest pre-approved photography from collections already in Lucidpress or from the NEIU Photo Library on Google Drive.

When designs reach final approval, users will receive a notification via email, see a **blue checkmark** over their document when logged into Lucidpress, and see a **green approval bar** appear over their document when opened. The top menu bar will change to show an **Order Prints** button where the **Request Approval** button was, and a **Download** icon next to the **Share** button. Approvers will remove any watermarks from the documents.
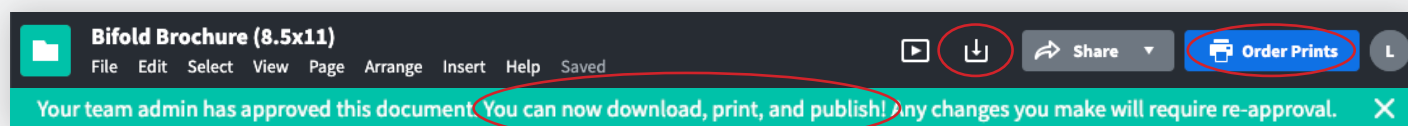
Please note: If the user makes any change to the document after final approval is given, Lucidpress automatically removes approval and will prompt the user to seek approval again. This includes any small changes such as changing a period to an exclamation point, cropping an image, or nudging a text box over.

Downloading your design.

Users not printing through Lucidpress (optional) can download the file and print on campus, or send it to a vendor of their choice. Please keep in mind that this will require getting a purchase order.

Click the **Download** icon 🔽 on the menu bar.

An **Options** menu will appear with various saving options. Select **PDF** in the **Format**; if it is a multi-page document (brochure) select **Download as Spreads**, select **Print** for the resolution, check **Crop Marks** and **Bleed Marks** and download as a **Standard PDF**. ==Vendors need crop and bleed marks!==

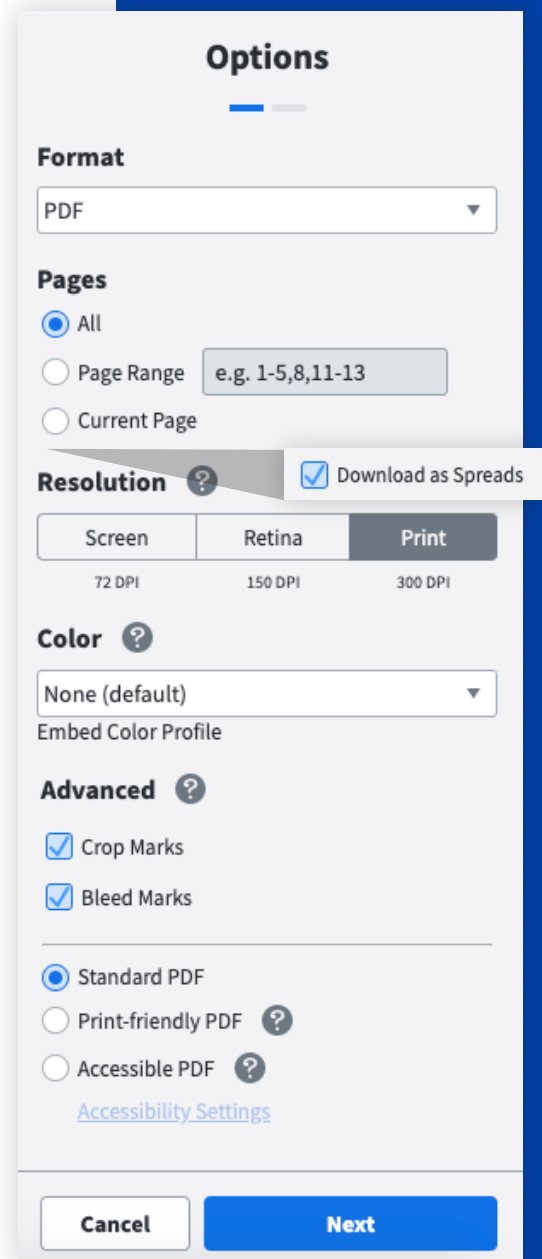Click **Next** and select **Check My Document**. Lucidpress will show the bleed mark and safety area to ensure content is well placed. It will also check the resolution of images to make sure they are print quality. ==If low-quality images are identified, contact approvers for help.==
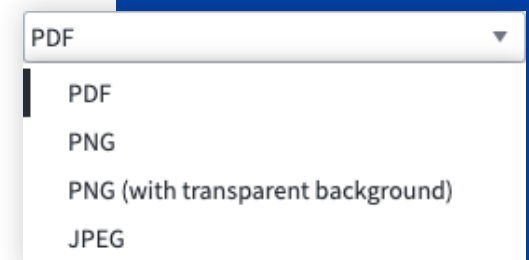
Users can also download other file formats. Only **PDF** needs to be downloaded at a Print 300 DPI resolution. All other file formats can be downloaded at either the Screen 72 DPI or Retina 150 DPI resolution.

Please note: If sharing a PDF digitally, select **Accessible PDF** from the **Options** menu to allow for searchable text and alternate text for images.

Printing with Lucidpress.

Users can choose to print select designs through Lucidpress. Designs that can be printed directly through the software will be indicated in the template details. *It is not mandatory to use Lucidpress as your vendor.*

Once the design has been approved, the **Request Approval** button will be replaced by an **Order Prints** button.


A menu will pop up with a paper size automatically detected. Click the highlighted icon (as seen to the left). Depending on the product, there will be different options after clicking **Next**. Users may be prompted to select single or double-sided printing, upload a .CVS file for direct mailers, etc. The example to the right shows the options for a multi-page flyer. All users will be prompted to fill in the quantity they want printed.

Select **Check My Document** to preview the document prior to sending. This is your proof!!

Once the document has been checked, add the product to your cart. This will open up the order in the **Cart** page in the main left side navigation. Follow prompts to complete the order.

Please contact marketing@neiu.edu for assistance if unsure of selecting the right options.
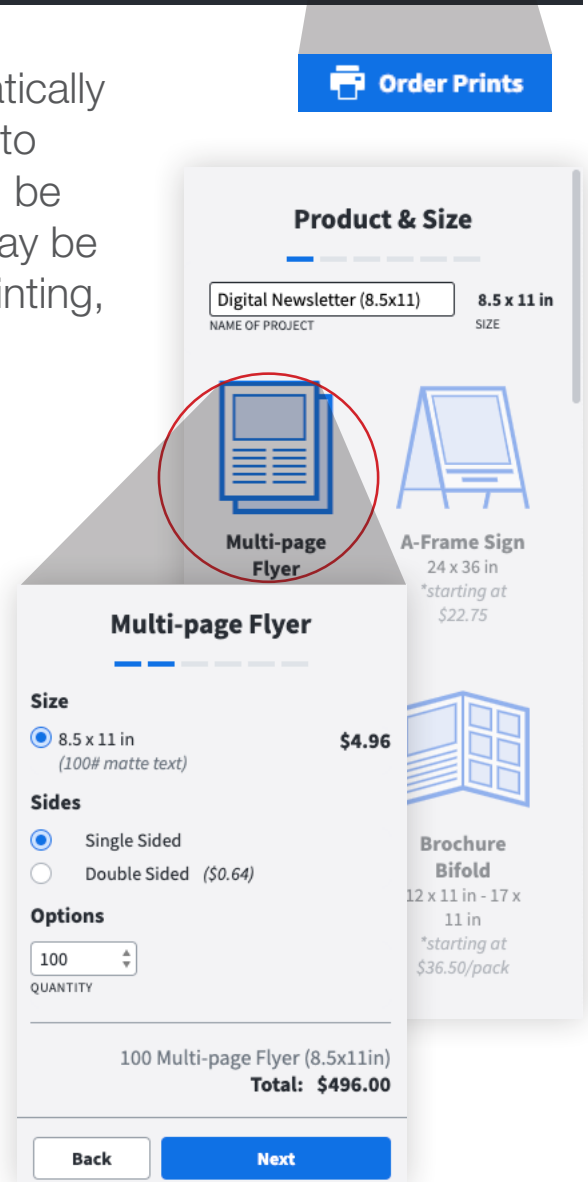
View printing sizes

Sharing your design.

If the user does not want to print the design, they can share it digitally through email or social channels.

Users have the option to share by publishing on the web, embedding into an email, embedding onto a website, or posting to a social channel.
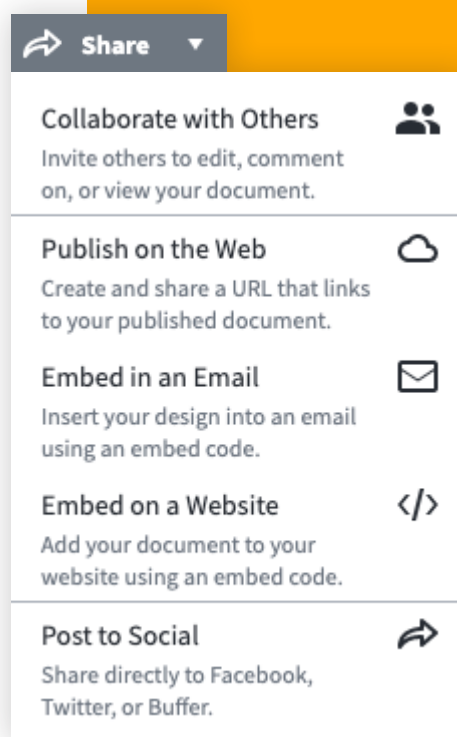
The **Publish on the Web** option will generate a link to directly share the design. Users are able to customize the link if desired.

Embed in an Email and **Embed on a Website** options prompt the user to publish the document before sharing. This will generate HTML code to place into the platform being used.

Users are discouraged from publishing documents on Northeastern's website due to their accessibility limitations for users with vision or reading disabilities. Questions about this may be directed to the website team at public-relations@neiu.edu.

If the user does not use a platform for email, such as Constant Contact, they can still share by attaching the PDF to their Nmail. Please remember to save the PDF as **Accessible PDF** if using this method.

Post to Social will prompt the user to sign into Facebook or Twitter to share a link to the design.

Share ▾

Collaborate with Others 👥
Invite others to edit, comment on, or view your document.

Publish on the Web ☁
Create and share a URL that links to your published document.

Embed in an Email ✉
Insert your design into an email using an embed code.

Embed on a Website </>
Add your document to your website using an embed code.

Post to Social ➶
Share directly to Facebook, Twitter, or Buffer.

Questions?

Schedule a training session!
marketing@neiu.edu
public-relations@neiu.edu