



**APPALACHIAN  
SEARCH AND RESCUE  
CONFERENCE**

# **Branding and Publishing Guide**

# Branding and Publishing Guide of the Appalachian Search and Rescue Conference

Version 1.4

Approved by the Board of Directors 10 October 2021

Appalachian Search & Rescue Conference, Inc.  
P.O. Box 400440, Newcomb Hall Station  
Charlottesville, VA 22904



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Set in Scala Sans and Minion with InDesign

This document may be downloaded from  
<http://archive.asrc.net>

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# Introduction

This document should really be called the “ASRC Branding, Style, Production, Publishing and Collaborative Editing Guide” but that’s too long. And “Branding Guide” is the standard term that corporations tend to use, and it’s good to stick with a standard term, but we wanted to get across the idea that it also has technical information about how to collaborate and publish our documents, so we changed it to “Branding and Publication Guide.”

These days, big corporations often have very slick, very detailed branding manuals. They are expensive and much more than the ASRC needs. These guides are often 30-50 glossy pages with a great amount of detail. Why? Because having the logo always look the same, having the letterhead always look the same, and having official documents always look the same is a good thing. *Consistency* reassures customers and suppliers that the company is in solid shape and that they should continue dealing with it. A *professional* as well as consistent appearance reassures as well.

We already have some branding standards: the blue shirt and the ASRC patch, described in <http://archive.asrc.net/ASRC-Admin/ASRC-Uniform/2013-03-05-ASRC-Uniform-Simple.pdf>.

In the beginning of the ASRC, we had standard printed stationery. But over the past 40 years, things have changed. Now, you can just drag and drop an ASRC logo graphic into the top of a document and assume (wrongly) that it creates an official letterhead. The size, colors, position and quality of the logo therefore vary. A lot. The same thing occurs with our official documents, which also vary a lot in terms of margins, typeface, and other design elements such as big pretty pictures on the front page.

For the same reasons as for a large corporation, better branding would be good for the ASRC. We don’t need a slick glossy \$10,000 35-page branding manual, but for the ASRC, at least a *little* bit of branding and standardization seems like a good idea.

Thus, this *Branding and Publishing Guide*.

And, we need guidance on how to collaborate on, edit and publish, both print and online, our publications and governing documents. That is the “publishing” part of the title, and is covered in the subsequent sections.

The ASRC has three major types of documents:

- **Governing documents** are under the purview of the ASRC Board of Directors and require a vote of the Board of Directors to revise. There are two exceptions. The *Credentialing Policy Manual* must be approved instead by the ASRC Credentialing Board. To change the *Remote Support Corps Charter*, the Remote Support Corps must vote on proposed revisions which then go to the entire ASRC Board of Directors for approval. Our governing documents are the:
  - *ASRC Administration Manual*
  - *ASRC Articles of Incorporation*
  - *ASRC Branding and Publishing Guide*
  - *ASRC Bylaws*
  - *ASRC Credentialing Policy Manual*
  - *ASRC Remote Support Corps Charter*
  - *ASRC Training Standards*
- **Official Publications.** These include *Essentials for Search and Rescue* and the One-Pagers. These are developed and approved by the Publications Committee; the structure and function of the Publications Committee is documented in the Admin Manual.
- **Internal Documents.** These are generally created by a single ASRC member author or committee. For the sake of branding, even if just used internally, we prefer that they be formatted with the Word templates available in the Admin/Branding section of the ASRC Archive <http://archive.asrc.net> and linked on the Intranet/Sharepoint site at <http://home.asrc.net>. They are the responsibility of whoever created them or whoever has been assigned custody of the documents. Examples include:
  - Agendas
  - Minutes
  - Meeting Sign-ins
  - Certificates for Awards

Note the use of Creative Commons licenses rather than a copyright. These specifically allow people to print and distribute without permission. It also permits people to make their own adaptations, provided they acknowledge that it was adapted from something the ASRC produced. This makes it more likely that those outside the ASRC will use it, which is good for them and for ASRC branding.

## Writing Style

The ASRC has no *rules* for style. It does, however, *strongly* recommend industry-standard best practices.

The ASRC recommends following standard writing principles such as those Strunk and White's *Elements of Style*. One of the most famous maxims from this book is "Omit Needless Words." As an extension of this, you should use short words instead of long words wherever possible: *also* instead of *additionally*, *use* instead of *utilize*. It is still in print, and is available in a free online version.

Another good short, simple reference for technical writing is Morris Bolsky's *Better Scientific and Technical*

*Writing*. It is out of print but can sometimes be found used and is available in an online PDF.

One guideline specific to the ASRC: when writing about SAR teams in general, use *teams*; when writing about teams that are members groups of the ASRC, use the term *Groups* (capitalized) instead, as this is what is used in our governing documents.

Another is since the ASRC moved to four levels of Field credentialing (Field IV, Field III, Field II and Field I) the terms field team leader and field team member should generally be lower case, unless they refer to the prior ASRC credentialing levels of Field Team Leader and Field Team Member.

## Logo

The official ASRC logo is an electronic version in Adobe Illustrator .ai format. You can't use this .ai format file in, for example, Microsoft Word, but it can and has been exported to other versions that you can use directly.<sup>1</sup>

There are *raster bitmap* versions – .jpg and .png – but you shouldn't use these unless absolutely necessary. Why? Because when enlarged they get jagged edges (pixelated).

However, there are *vector* resizable versions of the logo, which stay sharp no matter how much you enlarge them.

There are vector in .emf (Enhanced Windows Metafile) format, which you can drag and drop into many programs, including the current version of Microsoft Word. There are also .eps (encapsulated PostScript) that can be dragged and dropped into Adobe programs, such as Acrobat, and if printing something with a commercial printer, is one of the formats they prefer.

You can find this document and the logo files in the ASRC Archive, [archive.asrc.net](http://archive.asrc.net) > ASRC-Admin > ASRC-Branding.

If you use the logo in a small size, the standard colors work well. But if you use a large size, such as on stationery, the logo's color might be overwhelming. Here are examples of a small, full-color logo, and a larger one desaturated by 15%. “Desaturate” is to decrease the saturation, or colorfulness, of a graphic's colors. They will look different in different contexts, such as on the cover of a manual or at the top of our letterhead. We recommend the desaturated one if you use a larger version of the logo.

## PATCHES

ASRC patches are 4.5 inches in diameter with merrowed edges, orange surround is not embroidered, remainder embroidered. Rocker bars are on orange non-embroidered material with merrowed edges; original artwork is available in the ASRC Archive in Adobe Illustrator and PDF formats:

- Above patch: REMOTE SUPPORT
- Below patch: FIELD III
- Below patch: FIELD II
- Below patch: FIELD I
- Below patch: SEARCH MANAGER

<sup>1</sup> There is a certain parallel with the standard meter bar, composed of an alloy of 90% platinum and 10% iridium, that was created in 1889 and resides in the Bureau International des Poids et Mesures in Sèvres, France.

## DECALS

For making decals (stickers) with the ASRC logo, it is likely that decal suppliers (for instance Moritz Embroidery, the only domestic US patch and decal manufacturer, conveniently in the ASRC region in East Stroudsburg, PA, and a regular source of ASRC patches and decals; our contact in 2021 was Claus Slama, [claus.slama@moritzembroidery.com](mailto:claus.slama@moritzembroidery.com)) require that the type on the logo be converted into outlines. That is because few suppliers have our Scala Sans typeface on their computers.

In order to convert the text to outlines, you must select the text in Illustrator with the selection or direct selection tool – or easier, with the Layers Panel – and then from the menu, pick Create Outlines. If you try to select the text with the text tool, Create Outlines will be greyed out and not available.

For the main logo itself, in the ASRC Archive are the following versions where this has been done:

2018-01-14-New-ASRC-Logo-Text-Outlines.ai  
2018-01-14-New-ASRC-Logo-Text-Outlines.pdf

## LOGO COLORS

Here are the official colors for the ASRC logo, whether on a website or on a printed document or a patch. These have been visually matched with the colors of the original ASRC patch #069, except that the snake has been made more yellow to account for fading. This patch has been protected from ultraviolet light and at a controlled temperature since it was created about 40 years ago, which is a fancy way to say it was in a closet.

There is also a version of the logo with desaturated colors for use at large sizes. The desaturated RGB colors are also listed.

### ORANGE BACKGROUND AND ORANGE LINE AROUND STAR OF LIFE

PANTONE 158 C  
RGB: 232, 119, 54  
LAB: L\* 63.53 a\* 43.77 b\* 63.01  
HTML: E87722  
CMYK: 0, 49, 77, 9  
HSL/HSB: 22, 79, 56  
Desaturated RGB: 218, 127, 73

### GREEN MOUNTAINS

PANTONE 7740 C  
RGB: 58, 145, 63

Logo Patches

LAB: L\* 53.13 a\* -40.74 b\* 33.43  
HTML: 3A913F  
CMYK: 60, 0, 57, 43  
HSL/HSB: 123, 43, 40  
Desaturated RGB: 86, 147, 80

**LIGHT BLUE SKY**

PANTONE 291 C  
RGB: 155, 203, 235  
LAB: L\* 79.43 a\* -8.06 b\* -20.85  
HTML: 9BCBEB  
CMYK: 38, 4, 0, 0  
HSL/HSB: 204, 67, 76  
Desaturated RGB: 165, 203, 230

**DARK BLUE STAR OF LIFE**

PANTONE 7670 C  
RGB: 86, 82, 148  
LAB: L\* 37.63 a\* 15.82 b\* -36.55  
HTML: 565294  
CMYK: 42, 45, 0, 42  
HSL/HSB: 244, 29, 45  
Desaturated RGB: 98, 92, 146

**YELLOW SNAKE ON STAFF OF ASCLEPIUS**

PANTONE 394 C

RGB: 237, 233, 57  
LAB: L\* 90.68 a\* -11.91 b\* 78.41  
HTML: EDE939  
CMYK: 0, 2, 76, 7  
HSL/HSB: 59, 83, 58  
Desaturated RGB: 232, 229, 97

**SILVER STAFF OF ASCLEPIUS**

PANTONE Cool Gray 3 C  
RGB: 200, 201, 199  
LAB: L\*80.83 a\* -0.71 b\*0.87  
HTML: C8C9C7  
CMYK: 8, 5, 7, 16  
HSL/HSB: 90, 2, 78  
Desaturated RGB: 201, 201, 199

**BLACK LETTERS AND OUTLINE**

**AROUND STAFF OF ASCLEPIUS**

PANTONE Black C  
RGB: 45, 41, 38  
LAB: L\*16.91 a\*1.18 b\*2.62  
HTML: 2D2926  
CMYK: 63, 62, 59, 94  
HSL/HSB: 26, 8, 16  
Desaturated RGB: 35, 31, 32



Full-color logo (above) and larger desaturated logo (below)



ASRC patches and rocker bars



# Stationery and Internal Documents

Graphics of the stationery and internal documents are on the pages following the text below.

## TEMPLATES

Available in the ASRC Archive (<http://archive.asrc.net>) and through a link in the ASRC Intranet/SharePoint site (<http://home.asrc.net>) are Microsoft Word templates for

- Official ASRC letters
- Official ASRC internal documents (with a smaller header to leave more room for text)
- ASRC Agendas/Minutes (which use the internal document header)

Examples of the letter template and the internal document template, as used to create an Agenda template and Minutes template and meeting sign-in, are shown below.

The Agenda and Minutes templates, shown below, use automatic numbering of Microsoft Word heading styles, as opposed to a numbered list. Unlike a numbered list, this allows typing an unlimited number of plain paragraphs between the headings.

It also preserves the ability to use the Microsoft Word Navigation Pane on the left (View > Show > Navigation). This provides an overview and makes it easier to quickly rearrange sections, especially when creating minutes where business is conducted in a different order than that projected in the Agenda.

## STATIONERY LOGO

Gradually the original stationery went away, as people switched from typewriters to word processors. There have been grayscale versions of the ASRC logo, but the color logo has been dominant on ASRC documents over the past couple of decades. It's also been much smaller than on the original stationery, perhaps since a subdued-color version was not readily available. The 15% desaturated version we use in the stationery header on a following page is about the same size as the black and white version on the original stationery; in color it was too much, but desaturated 15%, the size of the original seems to work even in color.

## STATIONERY TYPEFACES

Given the original typeface weight is not available in digital format, we can't have the original typeface, even

if we wanted to. The ASRC chose the original News Gothic smallcaps typeface as it gave an impression of professionalism. There's nothing wrong with that, but things have changed over the past 40 years, and News Gothic now seems a bit stodgy and old-fashioned (see Background at end). We still need something that looks professional, but forward-looking too. It needs to be appropriate to an organization on the leading edge of search and rescue. We do want a sans-serif typeface, as this is standard for titling and headings. (Serifs are the little flanges on the ends of letters, such as in the capital letter i. The capital "I" in this typeface, the default Calibri of Microsoft Word, has no serifs, whereas the letter in the this ubiquitous Times New Roman serif typeface, has serifs on either end: "I".)

We don't want something common and plebian like Arial, or even the more-common Microsoft Calibri that is used as a default text typeface by Microsoft Word. We want a sans-serif typeface, in the expectation that, unlike this document, people will match it with a common serif typeface such as Times New Roman, or better the serif typeface Georgia that Microsoft supplies as a default serif typeface. While Microsoft Word's default of Calibri for both headings and text is reasonable, a more professional approach is a **sans-serif typeface for a title heading and then a serif typeface for text and text headings**, so we recommend you use Minion (which is what this Guide uses for text), Georgia or Times New Roman for the body of letters or other documents, not a clashing sans-serif font such as Calibri.

Selecting typefaces is notoriously controversial and many have strong preferences. In this case, we looked at the title/heading typeface used in the most famous modern book on typography: Robert Bringhurst's *Elements of Typography*. It is Scala Sans and we have used it for the headers in this document and for the stationery and Internal document headers on the next page. Microsoft Word templates for the stationery, and for internal documents such as the agenda on one of the following pages, are available in the ASRC Archive, the Admin section, Branding subsection, and specifically in the Source Documents sub-subfolder.

It is not available freely online, but must be purchased. This makes it less common which is one of the reasons for choosing it for branding. The following weights are used in ASRC documents:

- FF Scala Sans Pro Regular
- FF Scala Sans Pro Italic
- FF Scala Sans Pro Bold
- FF Scala Sans Pro Black

The following weights are not used in ASRC documents, which decreases the purchase cost:

- FF Scala Sans Pro Light
- FF Scala Sans Pro Light Italic
- FF Scala Sans Pro Bold Italic
- FF Scala Sans Pro Black Italic
- FF Scala Sans Pro Cond Regular
- FF Scala Sans Pro Cond Bold

## AWARD CERTIFICATES

### PROCESS

In 2021, we standardized on a process and design for award certificates. This make it less painful and time-consuming for the Secretary. It also provides awardees with more professional-looking certificates.

With some prep work, all it takes for the Secretary to print off certificates is:

- A computer with Microsoft Word
- A black and white printer
- The three Microsoft Word templates (available on the ASRC Intranet/SharePoint site; the text is reproduced below without full typography and line spacing):
  - Years of Service award:

**On 1 January 1000, the ASRC recognizes  
John Doe  
for  
10000 years of service  
in support of ASRC activities and in service to those  
missing or injured in the outdoors**

- Outstanding Achievement Award:

**On 1 January 1000, in recognition of support of  
ASRC activities and aiding those  
missing or injured in the outdoors,  
the ASRC hereby confers on  
John Doe  
the ASRC's Outstanding Achievement Award**

- Fellowship

**On 1 January 1000, in recognition for a life of service  
supporting ASRC activities and aiding those  
missing or injured in the outdoors, the ASRC elected  
John Doe, FASRC  
a Fellow of the ASRC. Fellowship and  
the FASRC honorific are for life.**

- A supply of certificate blanks
- A supply of certificate holders to protect the certificates during handling, transportation and/or mailing. Paperplan dark blue certificate holders through amazon.com are cheap and adequate to the task but the brand doesn't really matter.

- An embosser with the ASRC logo for the foil seals to be applied to the certificates (obtained 2021, and given to the Secretary)

The Secretary, or anyone with a reasonably high resolution monochrome printer, then uses the Microsoft Word templates referenced above to create a new Word file, insert the date and name of the awardee, and print on the prepared blanks, as described below.

The Years of Service awards do not require an explanatory letter. The Outstanding Achievement awards and Fellowship awards should have an explanatory letter, this can come from the Chair or the Secretary.

### PREPARATORY WORK

The prep work to prepare for printing the certificates is as follows:

- We got the embosser through Staples (the big-box store). The embosser ASRC line logo is in the ASRC Archive, Admin > Branding > Source documents, and is 2018-01-14-New-ASRC-Logo-Line-Art.ai and 2018-01-14-New-ASRC-Logo-Line-Art.pdf.
- We buy the *Geographics 39452 Parchment Paper Certificates, 8-1/2 x 11, Optima Green Border*. These are available at Staples stores and through amazon.com. They include a gold-toned foil seal than we can, after the certificate is printed, apply to the certificate and then emboss with the ASRC embosser.
- We run those *Geographics* blanks through a high-resolution color laser printer and add the ASRC name and logo, and the name and a scanned signature of the current ASRC Chair. A PDF template for printing the name and logo and Chair's signature is available on the ASRC Intranet/SharePoint site; it is called ASRC-Certificate-Signature-and-Logo.pdf. We use the certificate preprinted paper and this PDF to prepare a stock of these blanks for the Secretary.
- When the Chair changes, we need to change the signature. This requires updating the InDesign file on the ASRC Intranet/SharePoint site; it is called ASRC-Certificate-Signature-and-Logo.indd.
- The process for preparing a transparent signature from a scanned signature is as follows:
  - Scan or import handwritten signature into Photoshop as grayscale or RGB AT 300 DPI
  - Save as PNG; if layer shows up as Index: Image > Mode > grayscale or RGB
  - In Layers Panel, double-click Background to turn to Layer 0
  - If need to (probably do): Image > Adjustments > Levels > move midlevels to the R to make the signature darker
  - Clean up signature with brush tool if needed.

- Go to Channels Panel.
- Control-click the RGB or gray channel to select the background.
- Click Delete to make the background transparent.
- If the signature line is too thin, in the PNG, select Filter > Other > Minimum (radius 1, or 2 if need to make thicker)
- Save and then drag and drop this PNG into the

InDesign file to replace the previous Chair's signature.

- (Pro tip: you can save the transparent-background PNG as a transparent-background PDF and then use this in Adobe Acrobat as a Stamp to sign documents, not electronically, but with a simulated manual signature.)



## APPALACHIAN SEARCH AND RESCUE CONFERENCE

P.O. BOX 400440 ♦ Newcomb Hall Station ♦ Charlottesville, Virginia 22904 ♦ [asrc.net](http://asrc.net)

[Date]

Reply to: [Reply to Address, no name as should be at bottom]

[Inside Address]

[Re: (optional)]

Dear [Addressee First and Last Name]:

[Text]

Sincerely,

[Your first and last name, your ASRC title]



**APPALACHIAN SEARCH AND RESCUE CONFERENCE**  
P.O. BOX 400440 ♦ Newcomb Hall Station ♦ Charlottesville, Virginia 22904 ♦ asrc.net

## **BOARD OF DIRECTORS MEETING AGENDA**

[Meeting Date] [Meeting Location or Phone Conference]

Dial-in: [meet.google.com/bmcujvsdjm](https://meet.google.com/bmcujvsdjm) (preferred) or 561-614-0036 418707422#

[Planned Start and End Times]

- I. Call to Order**
  - II. Participant Roll Call**
  - III. Approval of Minutes**
  - IV. Officer Reports**
    - a. Chair/Vice-Chair**

[Simply hitting Enter after a heading will enter text, in Normal Style.

As shown here with spacing for the next paragraph.]
  - b. Secretary**
  - c. Treasurer**
  - d. Credentialing Board Chair**
  - e. Conference Training Officer**
  - f. Conference Operations Officer**
  - g. Information Technology Officer**
  - h. Others**
- V. Unfinished Business**
  - a. Item 1**
- VI. New Business**
  - a. Item 1**
- VII. Good of the Order**
- VIII. Adjourn**



**APPALACHIAN SEARCH AND RESCUE CONFERENCE**  
 P.O. BOX 400440 ♦ Newcomb Hall Station ♦ Charlottesville, Virginia 22904 ♦ asrc.net

## BOARD OF DIRECTORS MEETING MINUTES

[Meeting Date]

[Meeting Location or Phone Conference]

[ Start and End Times]

**I. Call to Order**

**II. Participants.**

Voting members in **bold**. Via teleconference in *italics*. If some other Group is primary name in (parentheses)

Allegheny Mountain Rescue Group (AMRG)	
Blue Ridge Mountain Rescue Group (BRMRG)	
Maryland Search and Rescue (MSAR)	
Mountaineer Area Rescue Group (MARG)	
Northwest Pennsylvania Canine Search and Rescue (NWPACgSAR)	
Remote Support Corps (RSC)	
Search and Rescue – Ohio (SAROH)	
Shenandoah Mountain Rescue Group (SMRG)	

**III. Approval of Minutes****IV. Officer Reports****a. Chair/Vice-Chair**

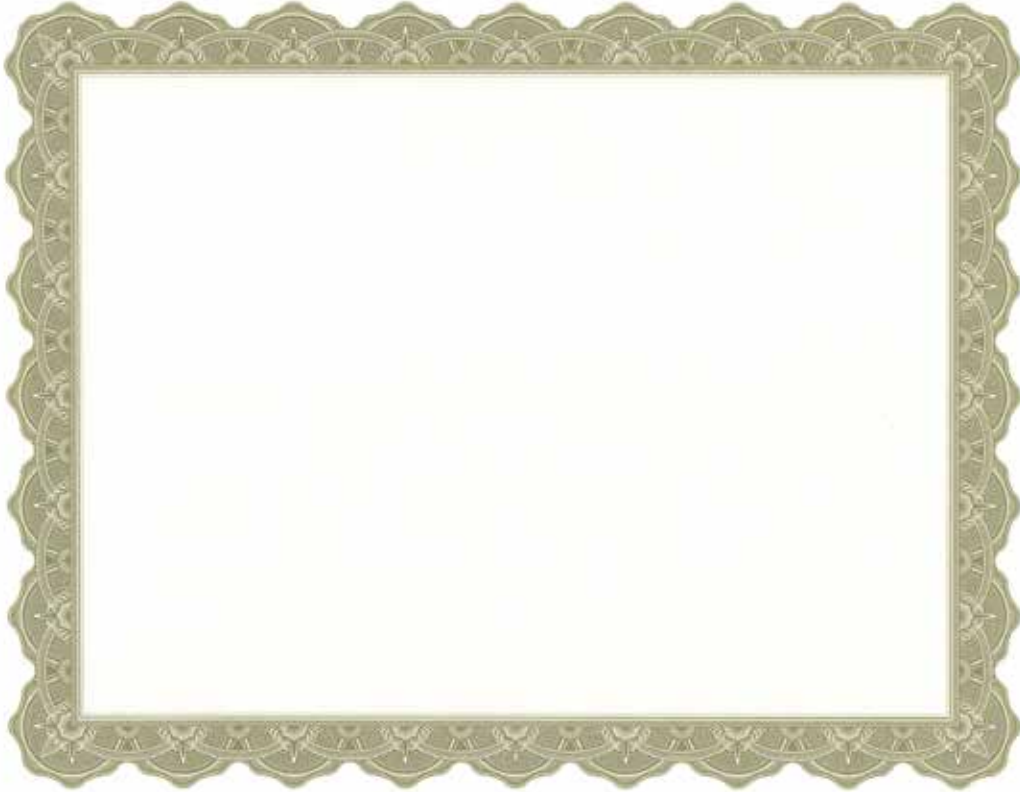
[Simply hitting Enter after a heading will enter text, in Normal Style.

As shown here with spacing for the next paragraph.]

**b. Secretary****c. Treasurer****d. Credentialing Board Chair****e. Conference Training Officer****f. Conference Operations Officer****g. Information Technology Officer****h. Others****V. Unfinished Business****a. Item 1****VI. New Business****a. Item 1****VII. Good of the Order****VIII. Adjourn**







Commercial Blank Certificate



Commercial Blank Certificate with ASRC Name, Logo and Chair Signature Added

# Document/Publication Format

## FORMAT

The governing documents and publications of the ASRC are, and should be, formatted and styled as illustrated and explained in this *Branding and Publishing Guide*. You can see the more examples of formatting and style in all the PDF documents and publications posted at the ASRC website.

If you have access to Adobe InDesign, you can see the detailed Table of Contents styles, Character Styles, Paragraph Styles, Object Styles, and Master Pages that create these formats in the InDesign files that create those PDFs, including this one. These are available in the ASRC Microsoft Teams folders for the Publications Committee.

Most of the details of how to use these styles in InDesign are laid out in the Technical Details section, below.

## INDESIGN

All ASRC public-facing governing documents and other publications are now formatted and published, whether in PDF or print, in Adobe InDesign, currently the leading publishing software. Internal documents are usually in Microsoft Word format for ease of updating, using the headers provided elsewhere in this *Branding and Publishing Guide*.

We use InDesign rather than Microsoft Word or Publisher. Why?

InDesign is much more sophisticated and can produce a much more professional looking document than Word or Publisher. Documents produced from InDesign, with the formatting shown in current ASRC documents and publications, and for which the instructions to format them in InDesign follow, are also easier for readers to use than those produced from Microsoft Word or Publisher. That's because, among other things, they have excellent Table of Contents which produce clickable links in published PDFs. They also have headers that make it easier to find a particular section or subsection.

InDesign is designed by and for publishing professionals. That means it's harder to learn than Word, but that output is much better in many other subtle and not-so-subtle ways.

Our InDesign formats have many features that may not be apparent on a quick inspection, but that make the document look more professional. One example: all

of the text is laid out on a 12-point grid: the vertical distance between all of the text, both body and headings, is 12 points or a multiple of 12 points (1/6" or one pica).

Explaining further details of the superior formatting provided by InDesign requires learning about publishing concepts such as leading (not "leeding" as in "leading a horse to water," but "ledding" as in "lead-pipe cinch"), kerning, tracking and optical margins. That is beyond the scope of this *Branding and Publishing Guide*. Further information on these topics is best found in Robert Bringhurst's book *The Elements of Typography*, the most respected book on typography. Adobe hired Bringhurst to help with InDesign and we have consulted with him about InDesign issues in the past.

Having the ASRC documents in InDesign does require that we have (a) at least one person who has InDesign, (b) this person is willing to learn how to use it, and (c) this person is willing to do the final formatting for the governing documents and publications. Given formats are now fairly stable, after much development and subsequent tweaking, it's pretty much (a) and (b) that are issues.

To make it easier on whoever is serving as ASRC Publisher (the ASRC member/members with InDesign and the knowledge and time to use it), the InDesign file for this *Branding and Publishing Guide* contains all the paragraph and character styles used in all of the ASRC governing documents and publications.

That's because the InDesign file of the *Branding and Publishing Guide* is the *Style Master* in the InDesign *Book Panel* for the ASRC documents and publications, and a change to a paragraph style or character style in this document can and should, with a few clicks of your mouse, propagate to all other ASRC governing documents and publications. Not all of the styles are needed for every document, but having them the same in all documents, and having them available in every document/publication to invoke when needed, goes a long way to keeping our documents/publications looking similar and professional.

However, this powerful feature can have side effects in other documents. One example is that improving (changing) a style in the *Branding and Publishing Guide* and propagating this change to other documents might move text in those other documents around and getting page numbers out of sync with the Table of Contents. You might need to check the Table of Contents for other documents and update them in InDesign with [click in Table of Contents] > Layout > Update Table of Contents. That's also the way you updated the Table of Contents

after editing the text, which may move some of the pages around.

## “ONE-PAGERS” AND BOOK PANELS

The ASRC is developing a series of “one-pagers,” which are a single sheet of paper, printed front and back, that provide “just-in-time” training. The inspiration was Carl Werntz’s idea in 2016 of one-pagers on safety topics, and the first one-pager was one he did on hydration, primarily for hot-weather operations. If we go back further, Keith Conover produced an ASRC “Searcher Information Sheet” in 1975.

These one-sheet, two-page branded handouts are informally called “One-Pagers” as “One-Sheeters” is just a nonstarter.

We also decided that these would be authored by the ASRC Publications Committee as a whole, collaboratively. Thus, even if one member takes on the major responsibility for shepherding a one-pager through to completion, they don’t have a byline to credit that particular member. However, they should get credit for any illustrations they provide, if they wish.

The One-Pagers contain a small chunk of useful information. But only as much as can fit onto one sheet of paper, in a fairly large type face than can be read outdoors in poor lighting. While they can be used in training sessions, they can also be used as just-in-time training at a search base. If we can’t fit it onto a one-pager, we’ll find some other way to communicate the information. But we can do a lot with the one-pager format.

These one-pagers might be used outside the ASRC, and even within the ASRC provide an opportunity to show the value of the ASRC to Group members. Thus, branding and professional design are major considerations.

There is branding on both front and back:

- A relatively small ASRC logo. This is a vector version, rather than a raster bitmap, so it will print at full resolution of the printer or typesetter.
- A large but subdued (25% gray tint) “Appalachian Search and Rescue Conference” and the web address at the bottom.

There are design elements that contribute to a professional look:

- Typefaces: Scala Sans (we use the Scala Sans Pro version that comes with an InDesign subscription and not the Scala Sans OT version that can be purchased) and Minion Pro, as also used in other official ASRC documents styled using this *Branding and Publishing Guide*.

- Main text set in 14 point on an 18 point grid: bigger text and wider leading (spacing) than in governing documents, for ease in reading in poor light. Eighteen point spacing between paragraphs, ditto. Everything lines up nicely on an 18-point grid, which nobody is conscious of but is an important design element: looks more professional, easier to read. All Paragraph Styles, including the various headings, are set in the Align to Grid option in the Indents and Spacing options, to All Lines. This makes sure all text aligns to this grid. This “All Lines Align” setting is the case with this paragraph’s text in the *Branding and Publishing Guide*, though this text is smaller (10 points) and has tighter leading (12 points) and paragraph spacing (indents or bullets but no additional space). The only exception is the fine print of the Creative Commons license, in which case it’s set to Align to Grid: First Line Only None.
- The blue text highlighting color matches the blue of the star of life in the ASRC logo. It should print fine and be legible on monochrome printers, but looks even better when you see it on a computer screen or a version printed in color.

We want to make sure the styles in all of the one-pagers are precisely the same. Doing this manually is very time-consuming. But InDesign offers a feature to synchronize the styles in a group of documents. This function uses a file to list the documents in the group, and to designate a single master document (the **Style Source**); you can then sync the styles in the Style Source with all the others. Thus, for the one-pagers, you can just make a tweak a style in the Style Source, in this case ASRC-Generic-One-Pager-Template.indd, and then with a press of a button sync this to all the other one-pagers.

The interface for this function is called a **Book Panel**, because it is used mostly to coordinate styles and page numbers across book chapters that are in separate files. The Book Panel is really a file that points to other documents. To open a particular Book Panel, you need create (File > New > Book) or open (File > Open) the appropriate file, which has an extension of .indb; the file for the one-pagers is One-Pagers-Book-Panel.indb.

**Important:** *before* adding any documents to a Book Panel, *turn off automatic pagination*, or InDesign will slow down trying to update the page numbers in all the documents. (Which will also disrupt any page numbering if we use this for documents other than the one-pagers.) To do so, **Book Panel > [top right menu button] > Book Page Numbering Options... > Automatically Update Page & Section Numbers > [uncheck]**.

One advantage of the Book Panel is that it provides an easy way to group files so they are easily accessible in InDesign, and some people use a Book Panel solely to

organize InDesign files. For the one-pagers, it certainly makes it easy to access them.

We are starting to use this Book Panel approach to synchronize styles across all the ASRC governing documents as well.

Governing documents that might be hole-punched or stapled or bound have one-inch margins. The one-pagers have half-inch margins as their primary purpose is to be handed out as disposable one-sheet documents as needed.

The title appears on the second page, but deemphasized by a 50% tint of gray, and no color as on the front page. The One-Pager template appears on the next two pages.

There are formatting options in the InDesign source files that help with the formatting, such as grids set to 6 picas to the inch rather than the InDesign default of 8 eighths to an inch, and some text frames (those with

the fine print) having the default text alignment set to Bottom to preserve the block-like headings on the two pages, framed by white space.

The text for one-pagers *must* fit in the allotted space. To preserve branding and professional appearance, we will *not* decrease text size or spacing to fit in more text. If the text (and any diagrams or other graphics) won't fit in the allotted space, then it's too much for a one-pager. Longer text might be appropriate for other publications such as a White Paper.

There is a bit of flexibility in the one-pager design. Many of the one-pagers have a single top left, 1”x1” thumbnail graphic (same size as the ASRC logo on the right) which, along with the title, identifies the topic of the one-pager. The Hypothermia and Frostbite one-pagers have bullets that look like snowflakes. Other deviations from the template should be discussed and approved by the Publications Committee.

# Generic One-Pager Template (second line only if needed)



Version 1.0 4 February 2018

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**Appalachian Search and Rescue Conference** ♦ **asrc.net**

## Generic One-Pager Template (second line only if needed)



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Illustrations by asdf asdf. Reproduced with permission.

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# Website

The ASRC website is an important ASRC “publication.” As with anything dealing with computers, there are *many* technical details that are necessary to support the design of the website.

## HOSTING

We use DreamHost to host our domains and host WordPress for us; the account is a free non-profit one. The primary email of record is treasurer@asrc.net to make sure that our bills for hosting get paid promptly and that our website doesn’t go down. We can add additional secondary emails, which you may have to do to have an email conversation with DreamHost tech support about the site. It is appropriate to ensure that our Information Technology Officer and Deputy Information Technology Officer aliases are listed as secondary emails.

## WEBSITE ADMINISTRATION DASHBOARD

Access to the ASRC website administration dashboard is at:

<http://www.myasrc.org/admin/>

Despite the domain name, this gets you to the **asrc.net** WordPress administration dashboard. The reason for this, is that we first set up the website at myasrc.org and then later mirrored it to asrc.net. This means any changes to the file structure must be made at myasrc.org rather than at asrc.net.

Passwords for this and other IT infrastructure is kept in a secure location and only accessible to those with a need to know.

## WEBSITE DESIGN AND STRUCTURE

The ASRC website (<http://asrc.net>) is managed as a series of pages using WordPress. Although WordPress is thought of as a way to create a website with a series of dated blog entries, the ASRC, as with many other organizations, uses it without creating any dated blog posts. WordPress is also a popular way to create website using WordPress “pages” rather than WordPress “posts.”

A WordPress “theme” gives the website its look and feel and can provide many other configuration options.

In web parlance, “responsive” or “responsive design” means a website that can be easily viewed and navigated on a big PC monitor, a tablet, or a cellphone. There are different ways to make a WordPress site responsive, but the way that the ASRC website is responsive is through a responsive Wordpress theme called ASRC which is a customized version of a free WordPress responsive theme from CyberChimps.

This works by disabling the standard WordPress editor and home page design that uses “blocks” of information, and instead, creating a custom web page using “widgets.” You access the home page thus:

- Login to the asrc.net WordPress administrative dashboard at <http://www.myasrc.org/admin/>
- > Dashboard
- > Appearance
- > Customize

To add material to a page, you have to add a widget. *The only way to see the “Add a Widget” button* is to start editing one of the existing Widgets and scroll to the bottom.

## DOCUMENT AND PUBLICATION FILES

At asrc.net, we have two subdirectories (subfolders), one each for our governing documents and publications. The files in these subdirectories are the current versions of the publications. We store older versions in the ASRC Archive.

Having the files in these subdirectories means that you can reference them by a short URL. For example: <http://asrc.net/doc/ASRC-Training-Standards.pdf>

The naming convention for these files: ASRC-[short name of document]. Unlike in the Archive (for the Archive naming format, see the ASRC Admin Manual at: <http://www.asrc.net/doc/ASRC-Admin-Manual.pdf>), there is no leading date, and no version number. All spaces are replaced with hyphens.

Within each subdirectory, there are a few files that, if someone browses the subdirectory, give a better listing of the files than the standard one. These are:

- .htaccess
- .error.php
- .index.php
- .style.css
- .sorttable.js

Access to these subdirectories are via FTP:

- FTP protocol: SFTP
- FTP host: ftp://grantspass.dreamhost.com

- FTP username: asrc\_admin
- FTP password: [in password file]
- FTP port: 22

**ASRC.NET/PUB**

“pub” is for publications designed for general use by the SAR public and available to the general SAR public as well. These documents are under the purview of the ASRC Publications Committee. These include the Training Guide and the One-Pagers.

**ASRC.NET/DOC**

“doc” is for our governing documents, which are here primarily for ASRC member, but available to anyone

who wants to see them. These are under the purview of the ASRC Board of Directors or membership. These include Bylaws, Operational Guidance Manual, and Training Standards.

**WEB FONTS**

Scala Sans and Minion, our standard fonts for printed and PDF materials, are not available as web fonts. However, we approximate them on our website with the following, which are available freely for download:

- For headings we use Source Sans Pro - <https://fonts.google.com/specimen/Source+Sans+Pro>
- For text we use Crimson Text - <https://fonts.google.com/specimen/Crimson+Text>.



# Slides

Slide presentations benefit from a professional appearance and consistency as much if not more than documents. Slide shows go back hundreds of years, to 17th century *magic lanterns*. Thirty-five millimeter (35mm) photographic transparencies came into use in the 1930s, and by the 1950s people had started boring friends and family with hours of blurry vacation slides. Slide shows really came into routine use for education and corporate presentations with the advent of the Kodak Carousel slide projector in 1965. By the 1980s corporations had realized the power of slide presentations and had full-time staff devoted to preparing slides for sales, executive presentation and educational lectures. Standardized backgrounds with corporate or institutional logos became required.

Microsoft's introduction of PowerPoint in 1990 sounded the death-knell for the Carousel and 35mm slides, and despite competition, powerpoint has become a synonym for a computer-based "slide" presentation. We provide PowerPoint masters as all other presentation programs will accept them.

Even in this day of cheaper, lighter and brighter LCD, LED and laser projectors, the emphasis on corporate branding for "slides" continues, and for good reason.

## COLORS

There is [good evidence](#) that black text on white is the most readable on a computer screen, but with a projection in a relatively-dark room the glare from the projected white background may cause headaches. The same evidence shows that white text on a black or gray background is quite readable on a computer screen. However, viewing a projected image across a darkened room is not the same as reading text in a computer browser or a piece of paper right in front of your face.

[Expert opinion says](#) that for projected slides, a bluish background with white or yellow text is probably best. This provides the best legibility (of colored backgrounds and texts) and the least eyestrain. The combination of red and green, in particular, causes a strobing effect and is famous for nauseating viewers.

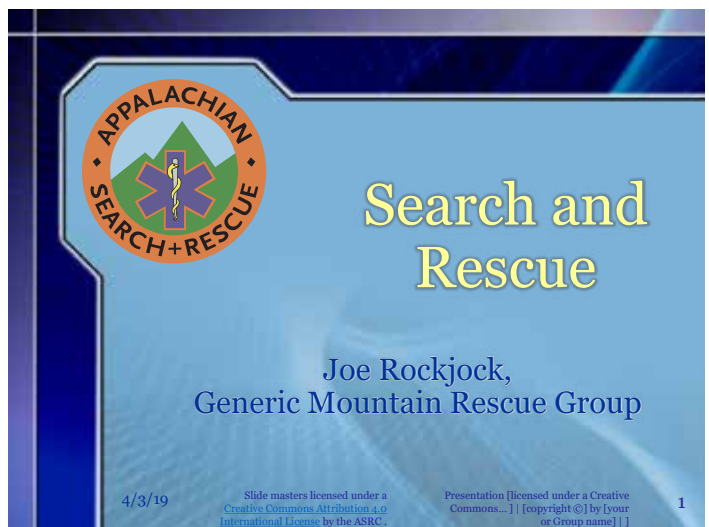
There are also psychological arguments for using a bluish background. A blue background tends to project calmness and professionalism, more so than a black or gray background. A blue background also contrasts perfectly with the orange around the edge of the ASRC logo. We could have used a plain blue background or a gradient with the ASRC logo in one corner. But the backgrounds we chose, one for title slides and a

different one for main slides, provide a distinct appearance, and one of the goals of branding is to provide something that looks distinct.

## GUIDELINES FOR SLIDE PRESENTATIONS

In his essay [The Cognitive Style of PowerPoint](#), Yale professor Edward Tufte explains how PowerPoint crashed a space shuttle (and now that we have your attention) can easily be misused. Some of the most important lessons there include:

- A slide presentation can foreshorten a complex subject and leave out important details.
- Projected slides have a low resolution compared to a piece of printed paper or even a lower-resolution



computer screen in front of your face.

- A slide presentation has to be linear and inflexible; it's hard to jump around based on interaction with your audience, which makes you unwilling to interact with your audience.
- Tufte is perhaps the world's leading expert on the presentation of data (just the titles of some of his books should provide a clue: *The Visual Display of Quantitative Information*; *Envisioning Information*; *Visual Explanations: Images and Quantities, Evidence and Narrative*; and *Beautiful Evidence*.) He points out the deficiencies of PowerPoint's data displays.
- Perhaps most importantly, Tufte has issues with making the audience read text on a wall. He doesn't think it's an effective teaching tool. He recommends using PowerPoint to show diagrams, illustrations, or photos.

A strictly Tufte-compliant slide show might consist of a series of graphics on a black background, broken up into sections by a few title slides. We provide a master title layout, and a section header layout.

Although we provide a variety of slide masters, it's a best practice that you should use a totally black background for the graphics slides. There is no need to have the ASRC logo on each slide. The ASRC PowerPoint template provides a black-background master with only a slide number.

If your audience needs to know how to spell a word, or you need to show some numbers, insert a graphic into one of the slide masters that provides a title. But as a general rule, it is better to insert graphics into a slide with a black background.

To make a PowerPoint slide show more usable for others, without filling the presentation with text for the audience to read off of the wall, put detailed speaker's notes in the notes field.

PowerPoint and other popular presentation software offer a mode where you can view the presenter's notes on a laptop while the projector is showing the slide. Those who wish to use someone else's slide show can read through the presenter's notes you've entered to prepare for the presentation.

## CREATING SLIDE MASTERS

These details on creation are for reference just in case someone, someday, needs to create new slide masters for the ASRC.

The background we chose is Crystal Graphics' background **PowerPlugs BGs 1 Bo9A.jpg**; this is from a CD from ~1999. They have many thousands of backgrounds available on their website and you can't find it by

searching on this name. For the widescreen version, we simply trimmed off the bottom of the background.

To make the lettering distinct on the lighter blue of the main title slide, in PowerPoint we applied the heaviest outer glow of gray to the yellow main title text (Home > Drawing > Shape Effects > Glow > [pick the bottom gray glow]), and an outer glow of white to the title slide subtext. Text for the other slides does not have an outer glow, nor does it need it as it's light on a dark background.

- A few obscure rules discovered while creating these slide masters:
- Text Boxes are not Placeholders.
- Only Placeholders work in Templates, not Text Boxes.
- Text that is not in Placeholders won't show up in the Outline view.
- You have to add a Placeholder via the menu at the top: View > Slide Master, Master Layout > Insert Placeholder.
- If you want to format text in a Content or Text Placeholder, you can't paste in text from another Text Box or Placeholder, you have to insert the Placeholder, and then edit the text that automatically appears there.
- To format text in a Placeholder, you can't use the Format Painter to transfer formatting from another slide. You can, however, copy and paste a Placeholder (or Text Box?) into the slide, and then use the Format Painter within that slide to copy the formatting.

## DOWNLOADING

Powerpoint templates that you can use to create your own ASRC-branded slide presentation are available, in both standard (4:3) ratio and widescreen (16:9) sizes. Only the standard is shown here but both are available at [archive.asrc.net](http://archive.asrc.net) > Admin > Branding or at <http://archive.asrc.net/#IDASRC-Admin-ASRC-Branding->.

## OVERVIEW OF SLIDE MASTERS

The branding on these slides consists of:

- **Background:** the backgrounds are professional ones that contrast nicely with the ASRC logo. There are separate backgrounds for title slides and standard slides. Please don't change the background, except to use a black background with no graphics for images (photos, diagrams and the like). We adjusted the original non-title slide background to make it a bit darker and have less contrast; note that it seems to print darker than it appears on-screen or projected.

- **ASRC Logo:** a large logo appears at the top left of the title slide master, and a small ASRC logo at the top left on all the other slide masters. The ASRC “Appalachian Search and Rescue Conference” in the official Scala Sans typeface does not appear on these slide masters. We think the logo is enough branding, and adding text would be too much.
- **Text Size:** text on the masters is sized to be readable when projected on a wall. If you make text significantly smaller, people may have trouble reading it. Unsolicited advice: If you have the urge to put lots of small text on a slide – don’t. Prepare a handout with your text, or take the time to verbally explain the concept to your audience while showing an image without any text, or even just show a black slide.
- **Title Slide Master Text Color:** the most important text is in yellow, and we have replaced the old standard PowerPoint drop shadow with a contrasting outer glow which provides the needed contrast but is more subtle. Subsidiary text is in dark blue with a white outer glow on the lighter blue background.
- **Non-Title Slide Master Text Color:** Since the non-title slide masters all have a darker blue background, the most important text is in a tint of yellow with a gray drop shadow. Outline text has a first-level with light blue text with a black drop shadow. Lower outline levels are in a whitish tint of yellow, with again a black drop shadow.
- **Text Font/Typeface:** The typeface is Georgia, which is a typeface that will be found on most computers, which is important as PowerPoint cannot embed some typefaces. It is a serif face that is reasonably pleasant, and we also recommend it for letters using the ASRC letterhead.

Video

# Video

(reserved)

# Intellectual Property

At the March 2019 ASRC Board of Directors meeting, we had a long and productive discussion about the interaction of copyright and Creative Commons licenses for slide or other presentations created by ASRC members. We discussed the following points:

- ASRC members may wish to include in their presentations copyrighted material which they, but not others, are permitted to use. An example is a figure from a published journal article written by the member. Thus, such a member's presentation should bear a copyright by that member. And, the Creative Commons license on the slide masters should apply only to the slide masters, not to presentations created using the slide masters.
- The Creative Commons license By-SA used for ASRC documents is not appropriate for the ASRC slide masters, as it allows others to modify them. It should be By, which requires attribution, but does not allow modification.

Based on this and other considerations, in April 2020 the ASRC Board of Directors established the following:

It is important to have copyright in mind both when looking to include someone else's copyrighted work in our work, as well as when authoring, publishing and sharing a piece of our own. Copyright law is an extensive and complex field, it varies by where you are in the world, and attempting to describe its nuances is way out of the scope of this document. Per the U.S. Copyright Office, copyright "protects original works of authorship including literary, dramatic, musical, and artistic works, such as poetry, novels, movies, songs, computer software, and architecture. Copyright does not protect facts, ideas, systems, or methods of operation, although it may protect the way these things are expressed." In the U.S., a protected work does not need to be published to be protected and every work is copyrighted by default upon its creation.

For ASRC publications, the recommended license is Creative Commons Attribution-NonCommercial-ShareAlike. (CC BY-NC-SA). This would allow anyone to take material published under this license, copy, modify, and share the content, as long as they give appropriate credit to the ASRC, did not use it for commercial purposes, and shared any new derivative works

under the same license. It is important to specify, when the ASRC logo is included in the publication, that the Creative Commons license only extends to the content and not the logo (which would be protected by trademark, not copyright). To do this, the copyright notice should be explicit about what is licensed and what isn't, such as: "The text of and illustrations in this document are licensed by the ASRC under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 license ("CC BY-NC-SA"). The ASRC name, acronym, logo and all other associated marks are protected trademarks of the ASRC."

ASRC authors must ensure that any works included in our publications are properly licensed for us to use. A few strategies to ensure this include using works licensed under Creative Commons, using works that are in the public domain, using works in a way that complies with Fair Use, or obtaining explicit written permission by the copyright holder and ideally, if different, the author of the piece in question as well. When available, look for specific instructions on the permissions page of the websites of the publishers of material you would like to use. It is important to keep in mind that the first and last of these suggested strategies (some Creative Commons licenses, or obtaining permission to use copyrighted material) may not be compatible with the Creative Commons license recommended above, in which case the publication must be released under a license that is compatible with the permissions granted for the works being included. In some cases, this may even mean disallowing any reproductions or modifications of the piece we are publishing. When in doubt, leave it out!

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- Copyright & Fair Use - <https://fairuse.stanford.edu/overview/>
- Creative Commons - <https://creativecommons.org/>
- Copyright Law In 2020 Explained In One [Very Long] Page: <https://www.whoishostingthis.com/resources/copyright-guide/>

# Document Collaboration

## DOCUMENT COLLABORATION BASICS

### RECOMMENDATIONS

These recommendations will likely change without much notice as technology changes. But as of the particular second this section was typed, we think the two best methods for ASRC document collaboration are:

- Documents with a significant number of graphics and tables, such as *Essentials for Search and Rescue* and some of the One-Pagers: Use Adobe InDesign *Share for Review* as described below, for review and markup/sequential collaboration.
- Documents that are mostly text, like the *Bylaws* or *Admin Manual*: export Microsoft Word files from InDesign and put them on the ASRC's OneDrive folder for co-editing/real-time collaboration, as described below.

The table "[Document Collaboration Systems](#)" on [page 31](#) provides an overview of different document collaboration methods suitable for the ASRC. As these collaboration methods mature and improve, we will update, and it is likely we will want to change our choice of collaboration systems.

### BACKGROUND

For over 45 years, the ASRC has been a wide-area network of Groups and people collaborating on projects of joint benefit. Given technological changes over the decades, and now Covid-19, our methods of collaboration have gradually morphed from mostly in-person meetings to mostly virtual meetings for collaboration.

A major portion of our collaboration is to review and update our governing documents and other publications. Over the past 45 years, our methods for doing this have evolved from

- Mailing photocopied documents for review, to
- Emailing Word documents, to
- Emailing commentable PDF files, to
- Google Docs, to
- Reviewing and commenting on commentable PDFs online using Adobe Document Cloud, to
- InDesign *Share for Review* online.

While these all incrementally sped up and improved the quality of our document review and updates, the process can improved further. There are many ways to collaborate on documents; they change, and new methods are created, almost monthly.

Microsoft Word has always had outstanding commenting, reviewing, and redlining/blue-penciling (wordsmithing) tools. More recently, we can put a Microsoft Word file on the ASRC Microsoft SharePoint site; multiple people can use all of those tools on the online version of the document at the same time, and see each others' comments and edits.

However, getting a Microsoft Word file out of and into InDesign are complex and labor-intensive jobs, although there are ways to greatly simplify them. (For details, see "[InDesign RTF Editing in Word](#)" on [page 40](#).)

Getting a Google Docs file out of and into InDesign is even more labor-intensive and significantly more error-prone. Unlike Microsoft Word files, we know of no way to simplify it.

Getting an RTF file (Rich Text Format, .rtf) out of InDesign is just a matter of a few clicks. The problem is that when you look at it in Word – Microsoft Word understands RTF quite well – it really doesn't look much like the InDesign original. The main problem is that many of our documents are in some kind of outline format, numbered or just indicated with differently-styled headings. The differently-styled headings show up somewhat like the InDesign original, but the outline numbers and letters don't show up properly in Word. For Microsoft Word files, there is a way to insert that outline number/letter formatting. We are aware of no such workaround for Google Docs.

Neither Google Docs or Microsoft Word work at all well at editing documents with lots of graphics or tables. They need to be produced in a page-design program such as InDesign (our choice), QuarkXPress or Affinity Publisher.

In the past, by creating this *Branding Guide*, the ASRC Board of Directors voted to have all of our external-facing governing documents and publications published using Adobe InDesign. This does have great advantages in creating more professional-appearing and more usable documents, especially those that include graphics or tables. However, it makes collaborative editing more difficult than co-editing a Google Docs or Microsoft Word document.

### TYPES OF COLLABORATION

If you are a lumpner rather than a splitter,<sup>1</sup> there are two paradigms of "collaboration" on documents currently

<sup>1</sup> [https://en.wikipedia.org/wiki/Lumpers\\_and\\_splitters](https://en.wikipedia.org/wiki/Lumpers_and_splitters)

Document Collaboration Systems					
Consideration	Exported Word file on ASRC OneDrive	InDesign Share for Review	Emailing comment-enabled PDFs	PDF in Adobe Document Cloud	Google Docs
General comments about method	Best commenting and proposed edits function. Best for documents that are mostly text. Requires complex behind-the-scenes work to produce RTF files with outline similar to the InDesign original.	Still evolving, but right now seems best option for documents of any length that include significant number graphics or tables, like this document.	Have experience with doing this.	Very little work for the ASRC Publisher: export to PDF, click a button, and copy the link to send to people to comment on the document.	Great for real-time collaboration, not good for editing existing documents or importing into InDesign. Suitable for short chunks of text such as motions or a couple of paragraphs of a document.
Ease of entering comments/proposed revisions	Very easy	Easy	Fairly easy	Fairly easy	Very easy
Ease of integrating edits and addressing comments in final document (importing back into InDesign)	Easy	Extremely easy	Hard, have to look at multiple commented PDFs and reconcile	Fairly easy, can import comments from PDFs into InDesign	Very hard
People can see others' comments and proposed revisions in real time	Yes	Yes	No	Yes	Yes
All comments/proposed revisions associated with a name other than "Guest"	?	Can be guest and still input name; if register, get notifications about comment/replies	?	Yes	?
Can edit text as a proposed revision	Very easily	Yes	Sorta	Sorta	Very easily
Can see and act on comments in InDesign	No	Yes, no need to import	Can import comments from PDF into InDesign	Can import comments from PDF into InDesign	No
Reps can share further by emailing document or URL	Yes	Yes	Yes, but only by further emailing document, not URL	Yes	Yes
Must/can restrict to individual email invite	No?	Optional	Can forward by email	Optional	Optional
Can Password Protect	Yes	Yes	Yes	No	No
Can wordsmith either with a projector or in online meeting sharing screen	Yes	Yes	No?	No, as have to save to PDF to upload to the Document Cloud	Yes
Ease of preparing final document in InDesign	Neither hard nor easy, have to do some reformatting	Very easy, no reformatting needed	Fairly easy	Fairly easy	Hard
Ease of author/editor editing native or exported document (PDF or .rtf)	Bad if just raw .rtf (can't see outline numbers); if use prepared Word template file with styles that match InDesign styles much better.	Excellent, can work directly in InDesign as viewing comments.	Fair	Fair	Excellent
Can see document in final format	Fair, but text only, can't see graphics or tables	Excellent	Excellent	Excellent	Poor
Can edit document and still see comments from prior drafts	Yes, in the sense that all comments and edits can be seen until published or next clean draft.	No: comments lose their connection with the text if edited, see text for how to edit	No	No	Yes, in the sense that all comments and edits can be seen until published or next clean draft.

available to us: *co-editing*, which we can also call *real-time collaboration*, and *review and markup*, which we can call *sequential collaboration*. These are both explained further in the following sections.

### *Review and Markup/Sequential Collaboration*

For review and markup/sequential collaboration, someone – the ASRC Publisher, or maybe another ASRC officer or member acting as an editor – prepares a draft of a document and makes it public to solicit comments and suggested edits. Review and markup has likely been around since the time of Aristotle, Socrates and Plato ~2300 years ago. Review and markup still works well, and we can make it speedier and easier using online drafts. The process is:

- The editor prepares a draft in InDesign and makes it public with an online link and a closing date for comments.
- People review the document, add comments and suggest edits.
- People can see others' comments and suggested edits and respond to them.
- Once the comment period closes, the editor prepares a new version, and either
  - Presents it to the ASRC Board of Directors or Publication Committee for approval, or
  - Presents a new draft for review with a new comment period closing date.

Review and markup does not allow some co-editing options found in Google Docs and Microsoft Word such as moving a block of text. However, with review and markup, you *do* get to see the document with graphics and tables, the way it will appear in the final document. You can't do this with co-editing in Google Docs or Microsoft Word, as they don't have the page-layout capabilities of InDesign that we use to publish our documents.

We currently know of two not-too-difficult ways to do review and markup.

- **First method: Document Cloud PDF.** In InDesign, from the original InDesign .indd document file, create a temporary InDesign .indd file.
  - Name the temporary InDesign .indd document file with a filename starting with the date, thus: YYYY-MM-DD-DRAFT-[Document-Name-and-Revision-Number], such as **2021-07-02-DRAFT-ASRC-Branding-Guide-1.4.**
  - Use the temporary .indd file to *create and post a PDF online in the Adobe Document Cloud* and provide reviewers a link to it.
  - Reviewers can post comments, suggest edits, and see and respond to others' comments online.

- Once the comment period closes, import the comments from the PDF into InDesign, and use them to *edit the original document file* and then create a new version for approval or additional review and markup.
- *Do not edit the temporary InDesign .indd file.* Use the temporary InDesign .indd file and its imported comments to edit the *original* file. Editing a file with imported comments risks losing the connection between the comments and the text, making it impossible to tell which portion of the text to which the comment refers.
- **Second method: Share for Review.** In InDesign, from the original InDesign .indd document file, create a temporary InDesign .indd document file.
  - Name the temporary InDesign .indd document file with a filename starting with the date, thus: YYYY-MM-DD-DRAFT-[Document-Name-and-Revision-Number], such as **2021-0702--DRAFT-ASRC-Branding-Guide-1.4.**
  - In InDesign, from the temporary InDesign .indd file, *create an Adobe InDesign Share for Review* and provide reviewers a link to it.
  - Reviewers can post comments, suggest edits, and see and respond to others' comments. Comments show up in the temporary InDesign .indd file in real time.
  - *Do not edit the temporary InDesign .indd file.* Use the temporary InDesign .indd file and its comments to edit the *original* file. Editing the document and clicking the "Update Link" button may lose the connection between comments and the text or graphic to which they were connected, both in InDesign and for the reviewers looking at it online.
  - There is currently no way to archive the Share for Review version with the comments. Attempts to save as PDF from InDesign or the online version fail as parts of this are unreadable. Until Adobe provides a way to archive these drafts, or better yet a version management system, simply *leave the drafts online*, make notes of the URL for each draft, and leave the InDesign .indd file on your hard drive. And go to <https://indesign.uservoice.com/forums/601021-adobe-indesign-feature-requests/suggestions/40879750-allow-individuals-to-print-or-save-pdf-from-share> and vote for Adobe to fix this ASAP.
  - If you are the editor of a document, you can have the dated draft in one InDesign tab and the "real" file open in another tab. You can look at comments in the dated draft, then click Ctrl-Tab to switch to the "real" file and make edits.



If and when *Share for Review* improves to allow real-time editing by the editor without losing the connection between the comments and the text, and adds version management, it may bring us at least a semblance of the co-editing/real-time collaboration offered by Google Docs and Microsoft Word.

Even with the above procedure, Share for Review has a significant advantage over putting a PDF in the Adobe Document Cloud: the editor can see the comments and suggested edits in the temporary file in real time, and use this to start editing the original file. This will likely result in the volunteer editor preparing the next draft, or the version for approval, significantly more quickly.

### Co-Editing/Real-Time Collaboration

With co-editing/real-time collaboration, multiple people can work on a document at the same time, editing, moving blocks of text around, reformatting text and adding comments. All of the comments and changes remain linked to the text.

In Google Docs, there is only a single way to view the text: with inline edits and with comments in a sidebar. When a Google Docs document gets heavily edited, it can be hard to read and make sense of.

In Microsoft Word there have long been multiple ways for reviewers to view the text:

- Review > All Markup, No Markup, or Original;
- Review > Show Markup > turn on or turn off Comments, Insertions and Deletions, Formatting
  - Balloons > Show Revisions in Balloons, Show All Revisions Inline, or Show Only Comments and Formatting in Balloons.
  - Specific people: show all, or show or hide comments from certain reviewers.
  - Reviewing Pane: show the reviewing pane either vertical or horizontal.

These different ways to view a document's proposed changes far outstrip what Google Docs offers, which is only a single view changes with comments in a sidebar.

It is also far easier to get a properly-formatted Microsoft Word file back into InDesign for publication.

### ADDING OUTLINE STYLES BACK TO A WORD FILE

For our documents with an outline format, we can export an RTF file from InDesign to make use of Microsoft Word's superior document collaboration features.

Although the heading formats (for example, typeface and bold/italic) cross over during the export, the number/letter outline formats do *not* cross over.

Manually formatting the exported file have an outline format that looks roughly like the outline in InDesign is complex and tedious in the extreme. The following process is a seemingly complex but relatively quick and painless way to put that outline style back into the exported file.

In summary, the procedure is to export an RTF file from InDesign, convert to .docx format, and copy the outline from a file you have saved on your computer.

Relevant to the procedure below: you cannot *export* .docx files from InDesign, but you can export an .rtf file from InDesign, open in Word and then save in native Word .docx format. You can then *import* the .docx file back into InDesign.

- InDesign > [With Text tool selected, click in text section to be exported] > File > Export > [put in desired filename and pick RTF as format]; for longer documents such as the *Training Guide*, export separate .rtf files for each major section of the document.
- In Microsoft Word, open the exported RTF file and Save As .docx file; leave your file open in Microsoft Word
- Microsoft Word > Developer<sup>1</sup> > Templates > Organizer > Open file with the document's matching Word Paragraph Styles and List Style. (How to create such files is covered in "[InDesign RTF Editing in Word](#)" on page 40.)
- Copy all Paragraph Styles and the one List Style to the exported file, it should now look somewhat like the InDesign version, enough for editing purposes.
- Save the modified .docx file
- Upload the modified .docx file to the appropriate place in the ASRC SharePoint site ([home.asrc.net](http://home.asrc.net), most likely in the Open Working Group area or one of the Special Interest Groups)
- Once it is uploaded to the SharePoint site, anyone with permission can review, comment on and edit the file, even at the same time that others are reviewing, commenting on and editing the file; you can see everyone else's comments and proposed revisions.

### REVIEWING IN SHARE FOR REVIEW

*Adobe InDesign Share for Review* is new (2021) and rapidly improving. Used carefully,

<sup>1</sup> If not already enabled > File > Options > Customize Ribbon > Main Tabs > [check Developer check box]



and with some knowledge of its limitation and the workarounds, it is a powerful tool for collaboration.

The first thing for reviewers is to *sign in*. When you first try to enter a comment, it will offer you the chance to create an Adobe ID; it is simple and easy. *Don't* "Continue as Guest" but "Sign in with Adobe ID." If you "Continue as Guest" you will not get notified of replies to your comments. If you "Sign in with Adobe ID" you will get those notifications. If you create an Adobe ID

you don't get spammed, except with replies to your comments.

You can review and comment on *Share for Review* documents online in a browser window. You can also right-click the document in your browser window, and select Download (the only option) to download to your computer. Reportedly you can enter comments offline and then upload; we have not experimented with this yet.

# Technical Details: Print/PDF

## HOW TO CREATE HEADERS

For official internal documents created in Microsoft Word, we have some standard templates, as described and illustrated in [“Stationery and Internal Documents” on page 9](#).

This “How to Create Headers” section is here in case someone needs to reproduce part or all of the production process, for example, for a new logo or new internal document header. Headers and internal document formats were originally created in 2017-18 by Keith Conover, with input from the entire Board of Directors. The procedure used was:

- Create the logo in Adobe Illustrator and save it, this is the version with editable text on the logo.
- To make a version that would look right despite the text on a circle confusing PostScript drivers, select all the text in the logo and convert it to curves (Type > Create Outlines) and save this as a separate file, one where the text can no longer be edited, but will show up properly in an .eps or .emf file that can be put into a Word document and print properly. Save this “prints nicely but is not editable” version under a separate name.
- Import the version of the logo with curves instead of editable text into an Adobe InDesign document, sized as 8.5” wide and 2” high (File > Document Setup) to create a small letterhead-size graphic. The Internal Document Template Header is smaller, 8.5” wide x 1.5” high. You don’t want to make something as big as a whole 8.5” x 11” page (a) because it’s a big file, and (b) it’s too easy to accidentally move it with the mouse while editing text if it’s that big.
- Add the green bar and text, save it as an editable-text file, and then convert the text with the ASRC name, address and URL to curves (Type > Create Outlines). Save as a new file with printable but not editable text; you should still have the previous editable-text version as a separate file. Export the all-curves InDesign document to .eps (encapsulated PostScript) format (File > Export > .eps).
- Convert the .eps file to .emf (Windows Enhanced Metafile, something that Microsoft Word can handle) using <https://cloudconvert.com/eps-to-emf>.
- Create a blank Word document with standard 1” margins. Add in the template text. Change all the text in the document to Georgia.
- Drag and drop the .emf file into the top of that Word document ; make sure the text anchor is on the very first blank line of document, up at the very top.
- Right-click the graphic > Size and Position > Text Wrapping Behind Text > Position tab > uncheck Move with Text > click OK.
- Drag the graphic to the top of the document, then drag the *corners* (not the sides) so that the graphic fits from to side to side. Do not drag the handles on the middle of the sides to stretch the letterhead out of proportion; the logo should stay a circle, not an oval. Now – since Word won’t show you the top margin – drag the graphic up until the top of the green bar is at the top of the visible page, this will look right when printed (in Word, click Print and then look at the preview to check).
- Right-click the graphic > Size and Position > Lock Anchor (doesn’t lock the graphic from accidental drags, can’t apparently do that, but does prevent the anchor from being dragged to another place in the text, for example another page, so is worth doing).
- A similar process works for the Internal Document and any other Word templates you wish to make.

## BOOK PANEL AND SYNCING

For whoever is working on governance documents in InDesign (the “ASRC Publisher”), here are a few helpful hints. First, there is an InDesign “book” file (asrc.indb), that, if you use it properly, keeps the following items synchronized (the same) between all of the ASRC governing documents:

- Text Variables (used for the headings)
- Master Pages
- Table styles
- Cell styles
- Object styles
- Table of Contents (TOC) styles
- Character styles
- Paragraph styles
- Swatches (colors)

**Very important note:** for using a Book Panel for keeping styles in sync across multiple documents, turn off the sequential numbering. Sequential numbering is *only* for chapters in a book. Leaving sequential numbering on in a Book Panel will (a) screw up the numbering in all of your documents and (b) slow your system to a crawl. To turn off sequential numbering in a Book Panel:

- Book Panel >
- Top right “hamburger menu” icon (three parallel

horizontal lines) >

- Book Page Numbering Options >
- **Uncheck** Automatically Update Page & Section Numbers >
- Click OK.

This *Branding and Publishing Guide* is the “Style Source”: when in the ASRC Book Panel, you can select all the documents (click first one, shift-click last one) and then click the icon at the bottom left to synchronize. When you synchronize, the versions of all of those bulleted items above in the *Branding and Publishing Guide* overwrite the equivalent items in all other ASRC governing documents.

That means that you should make changes to items listed above in the *Branding and Publishing Guide*, or if made in some other document, copy to this *Branding and Publishing Guide*, before you synchronize.

If you need to tweak one of the bulleted items, usually a paragraph style there are two options, either to tweak an existing style or make a new one. If you make a new one, you still copy it into all of the documents so the styles are available there in case you want to use them, and to keep they style sheets the same for all documents, even if some are unused. To do so:

- If the change is a fix that should be made in all ASRC documents: make the change in the *Branding and Publishing Guide* and then synchronize the asrc.indb Book Panel by clicking the icon at the bottom left of the asrc.indb Book Panel.
  - Or, modify or add the new item in the document in which you need to make the tweak. Then, copy into the *Branding and Publishing Guide*. You do this as follows:
    - *Branding and Publishing Guide* >
    - Paragraph Styles Panel >
    - “Hamburger menu” (three horizontal lines) at top left >
    - Load Paragraph Styles >
    - Pick the document in which you made the change >
    - “Uncheck all” >
    - Click the item(s) that you changed >
    - Click OK >
    - Save the *Branding and Publishing Guide*, (you don’t need to close it) >
    - In the Book Panel click top document and then shift-click the bottom document to select all of them >
    - Click the synchronize button at the bottom left of the Book panel, which copies your tweak into all of the governing documents.
- If the change is a tweak that is unique to a particular document and should not be changed in all other ASRC governing documents.

- *Don’t* make the tweak in an existing style such as a paragraph style.
- Instead, *make a new paragraph style* based on the one you want to tweak (right-click and pick Duplicate Style is usually easiest, and then rename appropriately) >
- Go into the *Branding and Publishing Guide’s* Paragraph Styles panel, from the hamburger menu at the top right, click Load Paragraph Styles >
- Pick the document you to which you just added the new paragraph style >
- “Uncheck all” >
- Click the item(s) that you added >
- Click OK >
- Save the *Branding and Publishing Guide*, (you don’t need to close it) >
- In the Book Panel click top document and then shift-click the bottom document to select all of them >
- Save the *Branding and Publishing Guide* (you don’t need to close it) >
- Click the synchronize button at the bottom left of the Book panel, which copies your new paragraph style into all of the governing documents.
- You don’t need to *use* it in any of the other documents, but if you do, it’s there.

There are styles that are particular to the needs of an individual document. The *Articles* and *Bylaws* are very different from a document such as the *Branding and Publishing Guide*, so they each use different styles. Nonetheless, we can have similar bulleted/numbered paragraphs/headings be the same in all documents. That is why all of the Paragraph Styles, Character Styles, Object Styles, Table Styles and Table of Contents Styles are the same in all of the documents.

Some documents like this *Branding and Publishing Guide* are mostly text without any outline-numbered sections, some are all outline-numbered like the *Bylaws*, and some are have some of both, such as the *Training Guide*. If you investigate the ASRC TOC (Table of Contents) Style, you will see that outline numbers (for example, **I.**) are assigned the same level as a level-one text heading (**H1**); this makes it possible to have a Table of Contents for a mixed document such as the *Training Guide* that uses both styles as headings.

Short documents don’t need a Table of Contents, especially if headers help with navigation to the right section. But for longer documents and it’s simple enough to add a Table of Contents, if the paragraph styles are used properly.

There are two sets of settings that should be the same in all our governing documents and publications that are *not* synced by the Book Panel.

First is Document Footnote Options. This needs to be manually configured for each document: Type > Document Footnote Options > [leave at defaults except as follows]

- Numbering and Formatting
  - Restart Numbering Every > [check checkbox], select Page
  - Formatting > Footnote Formatting > Paragraph Style: Footnote Text
  - Formatting > Footnote Formatting > Separator: change from ^t (tab character) to ^> (N dash)
- Layout > [leave everything as default]

Second is the cross-reference formatting, which also needs to be manually configured for each document: Type > Hyperlinks & Cross-References > Insert Cross-Reference > [leave at defaults except as follows]:

- Link to: Text Anchor
- Cross-Reference Format > Format: Full Paragraph & Text Anchor > [click pencil-icon button to configure] > [check checkbox for “Character Style for Reference”] > Hyperlink

## QUICK AND DIRTY EDITING IN INDESIGN

If you just need to change a small bit of text in an InDesign document, for example, to correct a typographical error or make a minor change in wording due to a Board of Directors decision, you can simply edit the text in the regular InDesign WYSIWYG (What you See is What You Get) view.

InDesign has long had a “Story Editor” which shows the text without any formatting. But it’s not significantly faster than just editing text in the WYSIWYG view.

And with bigger documents and certain options turned on (see below), this editing can be painfully slow. To mitigate this, you could copy the text from InDesign into Word or any other text editor, edit it there, and then paste it back into InDesign.

However, the new (2021) beta-test Copy Editor Beta might make this unnecessary. The beta Copy Editor (not the same as the old Story Editor) loads the text, allows you to edit it and only dump it back into the formatted document once you’re done editing. Editing with the new beta-test Copy Editor it is much faster than in the formatted document or with the old Story Editor. However, when Keith Conover tried it in January 2021 on this document, it corrupted this document to where it would crash with any attempts to edit it further. He had to create a new document and copy all the text (some of which was difficult to copy) and graphics into it; see the thread <https://community.adobe.com/t5/>

[indesign/copy-editor-beta/td-p/11750588?page=1](https://community.adobe.com/t5/indesign/copy-editor-beta/td-p/11750588?page=1) to see how any fix for this is progressing. As of May 2021: no news.

## EXTENSIVE EDITING IN INDESIGN

Some choices for document structure, and formatting options that add much to a professional appearance, impact InDesign’s performance. So much so that editing text, even on a high-end workstation with a fast SSD hard drive, is almost impossible; or, if you try editing, InDesign will freeze. There are workarounds described below. These will likely need to be updated as InDesign changes.

Most important for a long document, including most of our governing documents: break the text into several sections, each section called a “story” in InDesign parlance. If you create or import text into stories that are separated at a top-level heading such as the H1 paragraph style you may never need to employ the workarounds described in the rest of this section.

You can do this manually, but it’s more tedious and time-consuming than it sounds.

Instead, download the free JavaScript program **BreakTextThreadVersion1.o.jsx**.<sup>1</sup> Add it into InDesign.<sup>2</sup> Use this to break the text into stories at each top-level heading paragraph style, such as “H1-new-page” or “H1.” This means that when you export a RTF Microsoft Word file from InDesign, you’ll have to do it for each story. But it is well worth it. If you have created a long document and performance in InDesign is slow, this may be enough to omit the following work-arounds. This probably counts as a best practice rather than a kludge. If this isn’t enough to give you good performance in InDesign, consider the temporary, likely only-while-editing, kludges below.

- Don’t have footnotes span columns. It really slows things down. And there is no aesthetic or style-manual requirement to do it. This option is currently *not* an option you can keep synchronized with the asrc.indb Book Panel/book file, so it has to be set manually for each document.
- Stop level 1 headings from spanning two columns for two-column documents. Use InDesign’s Edit > Find/Change function to change all the “H1” and “H1-new-page” (heading #1) paragraph style instances to the “H1-no-span-columns” paragraph style. “H1-no-span-columns” is based on, and is the same as “H1,” except for two changes:
  - Paragraph Styles Panel > H1-no-span-columns > Keep Options > Start Paragraph > [changed from

<sup>1</sup> <https://github.com/Id-Extras/Break-Text-Thread>

<sup>2</sup> <https://creativepro.com/how-to-install-scripts-in-indesign/>

the default **Start Anywhere to on Next Page**].

Having this set to Anywhere produces a more compact document, and is appropriate for some documents, but it is computationally intense and slows down text editing.

- **Paragraph Styles Panel > H1-no-span-columns > Keep Options > Start Paragraph > [changed from the default Start Anywhere to on Next Page]** Also, the “H1” paragraph style spans both columns, but the “H1-no-span-columns headings” does not. This also speeds up editing.
- Some of the changes suggested above will make your document longer, so you may have to:
  - Add some pages to see all the text
  - Once done editing and you’ve changed this back to Start Anywhere, delete the extra blank pages at the end, unless you have enabled Smart Reflow (see below).
- For publications that use the “I.” outline style as a top-level heading, there is also a “I.-no-span-columns” paragraph style that can also be used to speed up editing. Once you’re done editing the text, **remember to Find/Change to switch all the “H1-no-span-column” paragraph styles to “H1” or “H1-new-page” styles, and the same for “I.” and “I-no-span-columns” paragraph styles.** There is also “I.-new-page” and “H1-new-page” paragraph styles that can be used for documents, such as the Admin Manual or Training Guide, where it is desirable to have each new level 1 heading start on a new page.
- Another thing that slows text editing is the Balance Columns option. Turn this off for each major text frame, and only having it on for the page right before a page break for a new major section heading.
- Documents that have a large number of footnotes, such as the Training Guide, may be very slow when editing, so a useful workaround is Type > Convert Footnote and Endnote and change all of the footnotes to endnotes; this speeds up editing impressively. Remember to change them back once done editing, and to delete any empty text frames the program created to hold the endnotes.

## SMART REFLOW

Smart Reflow automatically adds and deletes pages at the end as the text expands or contracts, as it does when turning on and off the Balance Columns and Span Columns settings. We have found that this causes more problems than it solves, especially if you observe the best practice of breaking documents into “stories.”

Here is the process to turn this off for a document if it needs to be reset:

Edit > Preferences > Type > Smart Text Reflow View > Extras > Show Text Threads will show a line linking the two Primary Text Frames on the Master Pages if you’ve got it right. You have to click to select one of the linked text frames to get the text threads to show.

## MASTER PAGES

Master Pages are a very powerful tool to make sure all the ASRC governing documents have the same (professional) look and feel. The ASRC Governing Document Master Pages are as follows.

- **Master Page Spread A** This is for the first two pages of each document. Each page has certain fixed elements, including the logo and some boilerplate text. Each also has a text box for the document short title (first page) and the full title and revision date (second page). If creating a new document, you have to control-shift-click the text box to be able to type into it.
- **Master Page Spread B** This is for the majority of pages.
- **Master Page Spread C** This is for pages that don’t need a header, usually the Table of Contents pages, and perhaps another page here or there.
- **Master Page Spread D** This is the same as Spread B, but with Balance Columns turned off for easier editing. Unfortunately, as of the time of this revision of this section, it still doesn’t work. It’s still here in the hopes that Adobe will fix this bug at some point.

## RUNNING HEADERS AND PAGE NUMBERS

To deemphasize the headers and page number, which after all are usually less important than the text, they are all in a tint of gray rather than black. Headers are aligned away from the spine.

A web design usability principle is to provide a “Breadcrumb Trail” to provide situational awareness of where you are in the structure of the website. An example: **Home > About Us > Contact Information.** This is a way to reproduce this functionality for a PDF or print document in InDesign. Like a clickable Table of Contents, it makes it easier to find the appropriate section when scanning through the document.

Running headers are defined in an InDesign document’s Master Pages, using three defined Type Variables: Section, Subsection and Subsubsection. The Section variable picks up the text on the page that has the HeadText1 character style applied to it; this character

style does nothing to the text, but it is a sign to insert it into the running header. Similarly, the Subsection Text Variable is defined as the text formatted with the HeadText2 character style, and Subsubsection with the text with HeadText3 character style applied.

The three parts of the header are separated by white space. Bullets won't work as sometimes you will have an "orphan" bullet if a Section doesn't have a Subsection or a Subsection doesn't have a Subsubsection. This is a limitation of InDesign and maybe it will be fixed someday.

The disadvantage of using a character style for this is that you have to apply the character style to some text to get it to appear in the running header. Another disadvantage is that if you accidentally put a whole bunch of text in one of the "HeadText#" styles your header will have lots of words all run together in a single place, but this is fairly easy to see and fix. It would be easier to assign the Section, Subsection and Subsubsection type variables to a the paragraph style of a particular level of heading. But the advantage of using a manually-applied character style – and this is important – is that you can apply the HeadText1 or HeadText2 or HeadText3 character styles to just a portion of the heading. And given how the writers of ASRC documents like to use very long headings, it's often a good idea to select just the most important portion of the heading to appear in the running header. This way, you will have room in the header for all three levels of heading.

One potential problem is this. The Subsection portion of the header for a page with a Subsection may carry over to the next page, which has a Section with no subsections. (Or, a Subsection header may carry over onto a page with a Subsection without any Subsubsections.) There is an easy if somewhat tedious fix, as described below.

The following is easier if you have a Table of Contents, have it set to create PDF bookmarks, and use the Bookmarks Panel to quickly navigate to each of the H1 and H2 and H3 headings, which in itself is a great trick for quickly navigating a long document. It does require that you manually update the Table of Contents on a regular basis to make it point to the correct pages after any significant edits to the document. (Cursor in Table of Contents > Layout > Update Table of Contents.)

The following is also easier with Type > See Hidden Characters on so that you can see the spaces at the end of the headings.

Start by setting up four heading paragraph styles named H1, H2, H3 and H4. The standard ASRC InDesign format in this document, which is used in an asrc.indb book file as the Style Master for all the rest of the ASRC documents (a great way to quickly synchronize styles across all ASRC documents) has this already done for you. Create a Table of Contents using

the ASRC Table of Contents Style, and include all four of these in your Table of Contents. For H1, H2 and H3 headings, the heading, or an abbreviated version of it, will appear in your breadcrumb header. The H4 heading will appear in the Table of Contents but not in the headers. Four items in a breadcrumb header is just too much. If a section with an H1 heading has no H2 or H3 headings within it, you need to set up things so that the H2 or H3 headings from the prior H1 section will not carry over in the page header.

Set up three character styles named HeadText1, HeadText2, and HeadText3, again done for you in this document that will, if you use the asrc.indb book file as a Book Panel, carry over into all the other ASRC documents if use the asrc.indb Book Panel to synchronize them to you new document. Make no changes to the default character style formatting for these character styles. These "character styles" do nothing to change the formatting of the text, they only exist to allow the breadcrumb headings to use a subset of the full heading text. Whatever portion of the H1 heading you have formatted with the HeadText1 character style will appear in the breadcrumb header. For long H1 headings this allows you to have a short version of the heading's text appropriate for a breadcrumb header at the top of the page. For short H1 headings you apply HeadText1 to the entire heading text rather than a shorter portion of the heading text.

Set up **three Text Variables, Section, Subsection, and Subsubsection**, set to the character styles as follows:

**Section:** character style HeadText1, Last on Page

**Subsection:** character style HeadText2, Last on Page

**Subsubsection:** character style HeadText3, Last on Page

In your document, **format an appropriate-sized portion of each of your H1 headings with the HeadText1 character style.** If the H1 heading is short, you can apply the HeadText1 character style to the entire heading. Make sure this character style does not extend into the paragraph mark (visible with Text > Show hidden characters) at the end of the heading, or into the subsequent text.

**Do the same for all of your H2 heading's text with the HeadText2 character style.**

**Do the same for all of your H3 heading's text with the HeadText3 character style.**

**At the end of your first H1 heading, type a space, and then format it with the HeadText2 character style.** Note that's the HeadText2 character style, not the HeadText1 character style. This is to prevent any H2 or H3 headers from the previous section to carry over, which can be a problem if your current H1 section doesn't have any H2 headings.

**At the end of your first H1 heading’s space formatted with the HeadText2 then type another space and format it with the HeadText3 character style.**

Select and then copy both of these spaces to the clipboard.

Using your Bookmarks panel, double-click on the next H1 heading to go to it.

At the end of that H1 heading, paste your two character-style-formatted spaces. Do this for each H1 heading.

At the end of your first H2 heading, add a space formatted with the HeadText3 character style. Select it, copy it to the clipboard, then double-click all of the H2 headings in your Bookmarks Panel to go to them and paste your character-style-formatted space to the end of each of these headings.

One problem with this is when you accidentally format an entire paragraph with, for example, the HeadText2 style, InDesign tries to fit the entire paragraph into the header with predictably bad results. The fix is easy, select the offending paragraph with a quadruple-click, then up at the top, change the character style to None.

Sometimes a paragraph mark has been formatted with, for example, the HeadText2 style and the header will look back to the beginning of the document to pick the text for a header. Changing the offending paragraph’s or paragraph mark’s character style to None, or when you can’t easily figure out where the errant character style is hiding, deleting a heading and retyping it, fixes these problems.

One note about the header: on a master page, if you use the menu: Type > Text Variables > Insert Variable > Subsection, you will see something that looks like <Subsection> However, this is not the same as simply typing the letters for <Subsection> so don’t confuse the two.

## INDESIGN RTF EDITING IN WORD

At least at the time this was written, Microsoft Word offers superior online document collaboration features, such as commenting and suggesting edits. Thus, our interest in exporting RTF files from InDesign (that’s the only type of text file InDesign will export) and editing them using Microsoft Word.

This requires converting them to Microsoft Word .docx files, which then can be imported back into InDesign. But RTF files exported from InDesign, even when saved as native Microsoft Word .docx files, lose all of the numbered/lettered outline formatting of our outline-heavy documents.

Trying to manually apply outline styles to the exported file is both time-consuming and very, *very* complicated.

Thus, the interest in adding those outline numbers back into the exported RTF document by a faster method than manually doing so for each exported document, which can also complicate getting the revised document back into InDesign.

It is possible to use the Microsoft Word Template Organizer to copy Microsoft Word Outline Styles and Paragraph Styles from one document or document template to another document or document template. This will allow the exported RTF file, to some degree, to have the same outline numbering as it had in InDesign.

This section explains how to *prepare* to get a .rtf file (currently just of the Training Standards) exported from InDesign modified to reproduce the outline formatting seen in InDesign.

Once you have prepared for this, it’s fairly simple to export a RTF file, copy Microsoft Word Paragraph Styles and a Microsoft Word List Style into the RTF file, and put it online for collaborative editing. *That* process is explained above in [“Exporting a RTF File and Editing Online” on page 30.](#)

## INDESIGN OUTLINE STRUCTURE

In InDesign, the outline structure is entirely stored in the Paragraph Style. That means you can use multiple different Paragraph Styles that have the same level in the outline.

For example, in the *Bylaws*, the name of the top-level heading’s Paragraph Style is named “**Article I.**” The automatic numbering embedded in this makes the first such paragraph look like the following (this is just a simulation as we don’t want to mess up the *Branding and Publishing Guide’s* numbering):

# Article I. Organization and Roles

In this heading, the text “Article” is hard-coded into the InDesign Paragraph Style named “**Article I.**,” and the automatic numbering in that Paragraph Style is set to put in the Roman numeral I for the first occurrence of the paragraph, the Roman numeral II for the second, and so on.

But we want the heading Preamble, which comes *before* Article I, to look the same, and appear at the same top level (Level 1) in the Table of Contents.

To do so, we create an InDesign Paragraph Style named “**Preamble**.” It has the same typeface (Scala Sans



Pro) and weight (bold) as the InDesign Paragraph style “**Article I.**” We make sure that it has *no* numbering assigned to it.

Then, to the “**ASRC Document TOC**” Table of Contents style, we add the InDesign “**Preamble**” as well as “**Article I.**” Paragraph Style, both as Level 1 entries. (The ASRC Document TOC style also have Level 1 entries for appropriate top-level Paragraph Styles from other documents that should also appear in the Table of Contents. Examples include **H1**, **H1-new-page** (which is the top-level heading in this *Branding and Publishing Guide*) and **I.** which is just like **Article I.** but without the text “Article” automatically inserted before the Roman numeral.

There is also the problem that, in documents such as the *Training Guide*, there must be two different InDesign Paragraph Styles for paragraphs at the third level down. Here is a (simulated) example of part of the outline structure for the Training Guide, without the intervening text:

## Field IV (Trainee) Curriculum

### A. Safety, Health and First Aid

#### 1. Mid-Appalachian SAR Hazards and Risks

##### a. Subjective vs Objective Hazards

...

### B. Communications

#### 1. Goal: accurate, clear, and effective reports over radio

##### a. Before speaking:

...

In *A. Safety, Health and First Aid*, the first topic, *1. Mid-Appalachian SAR Hazards and Risks*, is a heading for a long section with many subsidiary headings and lots of text. The authors wanted this emphasized as a heading, rather than just another chunk of text. They also wanted to include this in the Table of Contents.

But in *B. Communications*, the authors considered *1. Goal: accurate, clear, and effective reports over radio*, to be just a chunk of outline-numbered text. They didn’t want it emphasized as a heading, and didn’t want it in the Table of Contents.

This disparity in the depth of outline-structured text occurs in many ASRC documents and publications.

To deal with this, we have two separate InDesign Paragraph Styles, the first, “**1.**”, the second, “**1. as**

**heading**”. The second is in the ASRC Table of Contents Style as a heading, the first is not. The second is in bold, the first is not. Since you want “**1. as heading**” to be the same as “**1.**” except for the typeface, the easiest way to create it is to duplicate it. In the Paragraph Styles Panel, right-click the “**1.**” Paragraph Style and click Duplicate.

### MICROSOFT WORD TEMPLATE FILES

Microsoft Word allows you to save a Word file (.docx file extension) as a Word Template file (.dotx file extension). For the files described above, containing the appropriate Word Paragraph Styles and List Style, it’s best to save as a Word Template file with a .dotx extension, and for those who are formatting the exported RTF files, to put them in their Word Templates folder.

Why?

Because when they have the exported RTF file open in Word, and open the Template Organizer, it automatically opens to the Word Template folder, making it easier to find the Templates there. That presumes that you have instructed them to put those template files into that folder. On Windows PCs, that folder is usually:

C:\Users\[your computer account abbreviation here]\AppData\Roaming\Microsoft\Templates

### MICROSOFT WORD OUTLINES

As observed at the outset of this section, in InDesign, the automatic numbering is integrated into InDesign Paragraph Styles. Although there are separate InDesign Table of Contents Styles, there are no separate InDesign Outline Styles.

But in Microsoft Word, an Outline Style with automatic numbering is a quite separate thing from Microsoft Word Paragraph Styles.

In a Word document, you can bind a Word Paragraph Style to a particular level, which ends up functioning somewhat similar to InDesign Paragraph Styles that are structured to include outline numbering.

However, and this is a critical difference: in a Word document, you *cannot* have more than one Paragraph Style attached to a particular level of a Microsoft Word Outline Style. *Unless* those two Paragraph Styles are linked in the sense that one is *based on* the other.

Thus, for the problem described in the previous section for dealing with the InDesign Paragraph Styles “**1.**”, the second, “**1. as heading**”, you just need to base the second on the first. One you have created and formatted the “**1.**” heading:

Word Styles Panel > bottom-left New Style button > Name the style “**1. as heading**” > click in Style Based on

Why not do like in InDesign and simply duplicate the “**1.**” Paragraph Style? Simple. Duplicating a style in

Microsoft Word is *not* simple like in InDesign. You have been warned. If you want to do so, the procedure:

With the Word file in which you're creating the Word paragraph styles open, and once you've created and styled your "1." Word Paragraph Style, do the following:

- Developer > Document Template > Organizer (bottom left)
- On the **right**, you should see your default template file, Normal.dotm (global template)
- On the **left**, select the "1." Paragraph Style.
- Click the "Copy ->" button to copy the "1." Paragraph Style to Normal.dotm on the right.
- On the right, in Normal.dotm, select the "1." Paragraph Style, click Rename, rename as "1. as heading."
- On the right, in Normal.dotm, select the "1. as heading" paragraph style and click the "<- Copy" button to copy to this file to the left.
- On the right, in Normal.dotm, select the "1. as heading" paragraph style and click Delete and then Yes to confirm the deletion.
- At the bottom left of the Organizer, click Close.
- You now have a duplicate style that you can modify. Remember to changed to "Style based on" to "1."

## WORD LIST STYLES

To create or modify a Microsoft Word List Style:

- Open a new Word file (standard Word file with the .docx file extension, you will save as a Word Template file with the .dotx file extension later) and create in it the List Style you want to have to match a particular document. Save the file with a name that matches the main outline style of the document. Creating a new multilevel List Style, or modifying one, is tricky. For good background with illustrations, see: <https://shaunakelly.com/word/numbering/numbering20072010.html>.
- The most important lesson in the above web page is that, to connect your Paragraph Styles with your List Style, you *must*:
  - Click the down arrow to the Multilevel Style icon, then either (to create the List Style in the first place): click Define New List Style, or (to modify a List Style) hover your mouse over a list style to see the name, and then right-click and click Modify
  - At the bottom left of the dialog box, click Format
  - Click Numbering
  - At the bottom left, click More if it's there
  - Make sure that for each level, except the top level, that the box "Restart list after" is checked, and after the checkbox it shows the level just above; for example, level 2 should restart numbering after

each level 1.

- Near the top right of the dialog box, make sure each level of the list is linked to the appropriate Paragraph Style.

## OTHER PARAGRAPH STYLES

It helps if you can style a few other Paragraph Styles, not major-outline headings, in Word as they are in InDesign. You will need a second Word List Style to deal with the two levels of bullets, and make the "with space after" variants "Style based on" the version without the space after to get the Word List Style to work. It is OK to put them in all of the Word Template .dotx files even if they aren't used. For example, the Credentialing Policy Manual doesn't (currently) have any bullets.

- "Bullet" paragraph style
- "Bullet with space after" paragraph style (for the last in a series of bullets with a "Body" paragraph after it)
- "Bullet Indent 1" paragraph style
- "Bullet Indent 1 with space after" paragraph style
- "Body" paragraph style
- "FirstPara" paragraph style (same as body but no indent at the beginning)

## WORD TEMPLATE FILES

In InDesign we can have one set of Paragraph Styles (which include the outline styles within them) and have the same in all ASRC documents and publications. But in Microsoft Word, only one Paragraph Style, or that Paragraph Styles that are "Styles based on..." that Paragraph Style, can be linked to a particular Word Outline Style. That means that for styling exported RTF files, we have to use several separate Word Template (.docx) files, each with its own main List Style.

You can then use the Microsoft Word Template Organizer to copy all of the Paragraph Styles and the one List Style from that Word file into the exported RTF file. Then, when you look at the RTF file in Microsoft Word, the outline numbering will look correct. Mostly.

Here is a list of the Word Template files that need to be created to allow this method of formatting exported RTF files. As we gain experience with this process it will be expanded and updated. These are easiest to use if you copy them all into your Word Templates folder, as that is where the Word Templates Organizer will first look for them.

- **H1-new-page-A-1-a-i.dotx**, for:
  - ASRC Training Guide; note that the Training Guide also uses the Paragraph Styles H2 and H3 in the Overview, and most of our documents use the Change History Heading Paragraph Styles, but as they include no numbering, there is no need to

attach them to the Outline Style. And the formatting from InDesign carries over into Word, so there is no need to create matching Paragraph Styles in Word to deal with them.

- **I-A-1-a-(1)-(i).dotx**, for:
  - *Credentialing Policy Manual*
- **H1-new-page-H2-H3-H4.dotx**, for:
  - *Branding and Publishing Guide*

#### TRAINING STANDARDS NOTES

To get the capital-lettered sections (paragraph style “A.”) to start over at A for each section, you have to go into the Paragraph Style for the heading style “H1-New-Page”

and in the Bullets and Numbering section:

- List Type: Numbers
- List [Name]: List 1
- Level: 1
- Remove the contents of the Number text field
- Mode: Start at 1 and this will ensure that each Level starts with A.

#### BYLAWS NOTES

Non-numbered paragraphs in the Bylaws generally format best with the 1.1 paragraph style, with a tab at the beginning.

# Historical Background

Things have changed since the ASRC was first founded in 1974. In those days, we had black and white stationery printed by a commercial printer. Gene Harrison hand-drew the logo design. The little line near the bottom is Gene's initials and the date. The printer put "Appalachian Search & Rescue Conference" text right at the top in News Gothic in a heavy weight (Smallcaps, Black or Heavy), a typeface weight that has never been digitized and is no longer available. An example is below after the sample one-pager.

We chose the colors for the patch, which later became a color logo, from the thread colors the manufacturer had available. On this page is a scan of one of the original 100 numbered patches the ASRC had made. The staff in the center was of silvery metallic thread.

The snake was originally a bit yellower but has faded to an orange shade over the past 40 years. We asked for silvery gold thread for the snake but they didn't have any. Note that the letters in the original logo and patch are not an actual font, but drafted so that the vertical portions of the letters are along radial lines out from the center of the logo, as shown on the next page.

In January 2017 Treasurer Victoria Airey proposed that we consider changing the logo to use the Scala Sans typeface instead of the drawn letters. Three versions using the Scala Sans typeface and the original design were the subject of a poll, and the current version with the small diamond-shaped bullets won, so in January 2018 the Board of Directors voted to change the logo.



**APPALACHIAN  
SEARCH & RESCUE**  
CONFERENCE, INC.

FACT SHEET

updated: May, 1979

THE ORGANIZATION

The Appalachian Search and Rescue Conference, Inc.(ASRC) is a volunteer



# Change History

Old versions are posted in the ASRC Archive at <http://archive.asrc.net>.

## OCTOBER 2021 (VERSION 1.4)

- Renamed to *Branding and Publishing Guide*.
- Entirely revamped the system for providing award certificates.
- Much more detailed information on the ASRC website.
- Minor edits throughout.
- Updated some of the very technical parts with new knowledge to guide those dealing with these issues in the future.
- Much reorganization of sections.
- New section on document collaboration with a new table.

## APRIL 2020 (VERSION 1.3)

- Clarified policy with a new section on Intellectual Property. The Master Pages for all ASRC documents

were changed based on this information, as were the slide masters.

- Significant technical changes in the Technical Details section and one minor change to the standard Agenda and Minutes format and templates.
- Added material on intellectual property, copyright and Creative Commons licensing
- Updated the slide masters
- Minor other changes throughout

## APRIL 2018 (VERSION 1.2)

- Changed to the new logo with Scala Sans lettering.
- Updated to the new stationery template, and added the internal document template, including a template for the Agenda and Minutes.
- Added a wide-format slide template and notes on how to create ASRC slide templates.