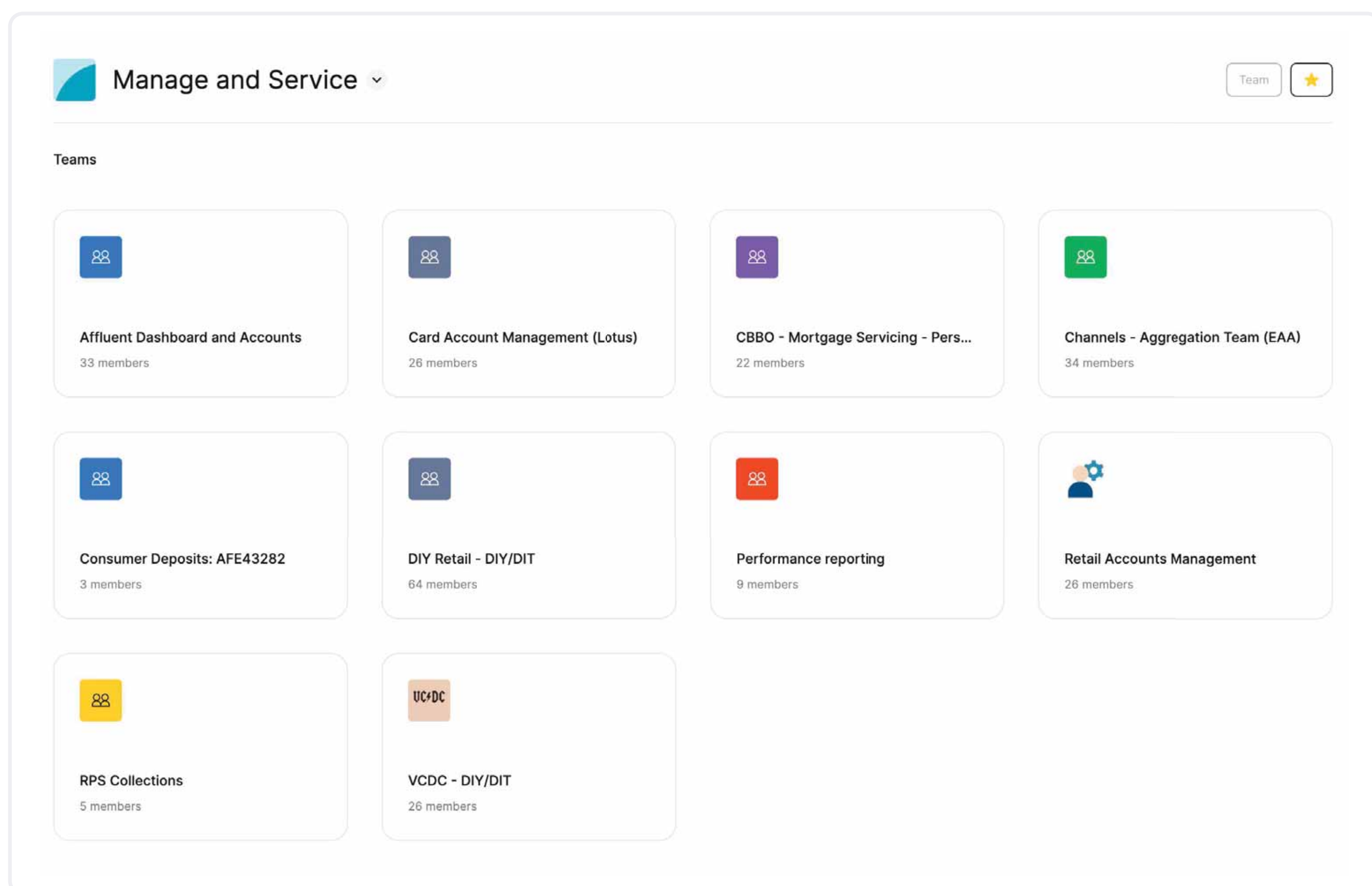


Finding and managing your team

Workspaces

All UX Design teams are grouped into workspaces, created and configured by our Figma org admins. You'll find your team in the workspace named for your customer journey portfolio. If you believe you need a new workspace, contact a Figma org admin or Laura Burke.



Team name

To create a new Figma team, get help from an admin listed for your workspace. Before you do, consider this guidance on naming.

Your team name can begin with the established name used in Jira, Confluence and other documentation sites. However, if this name doesn't reflect what your team does, add descriptive words so others can easily recognize your work. Don't repeat the name of your workspace.

Example: If you team is called Galaxy, use Visa Disputes (Galaxy) in Figma.

✓ Do: Describe the team's work. ✓ Do: Add nickname, if needed. ✗ Don't: Use nickname without description.

Lending – Vehicle Quick Loan

3 members

Card Account Management (Lotus)

3 members

Galaxy

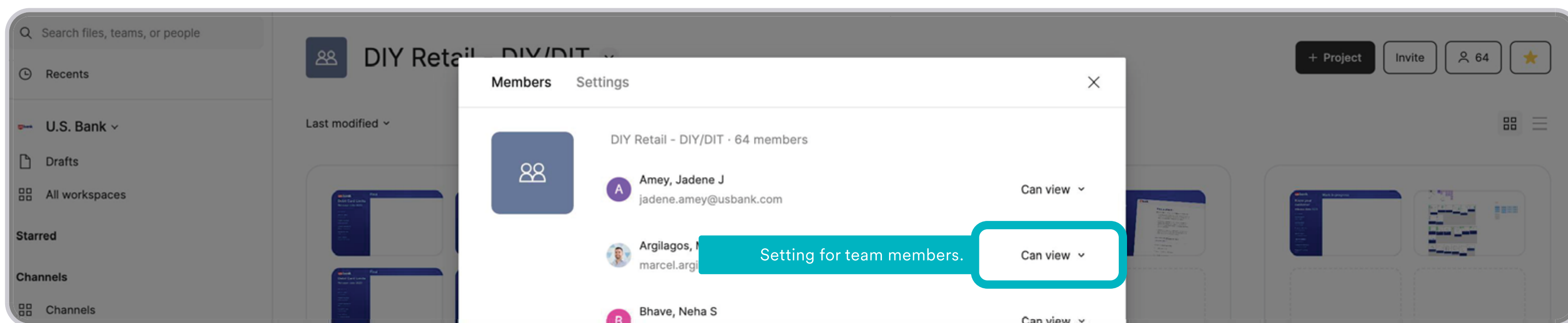
3 members

Access settings

In the team Members tab, grant **Can edit** access only to those in your UX design team. Be sure at least two of these people have Admin access. (The Owner is the individual who created the team, who may not be a working member of your group.)

Those without edit permission may view and comment. (You can also manage edit access at the project or file level. See more details in Creating files.)

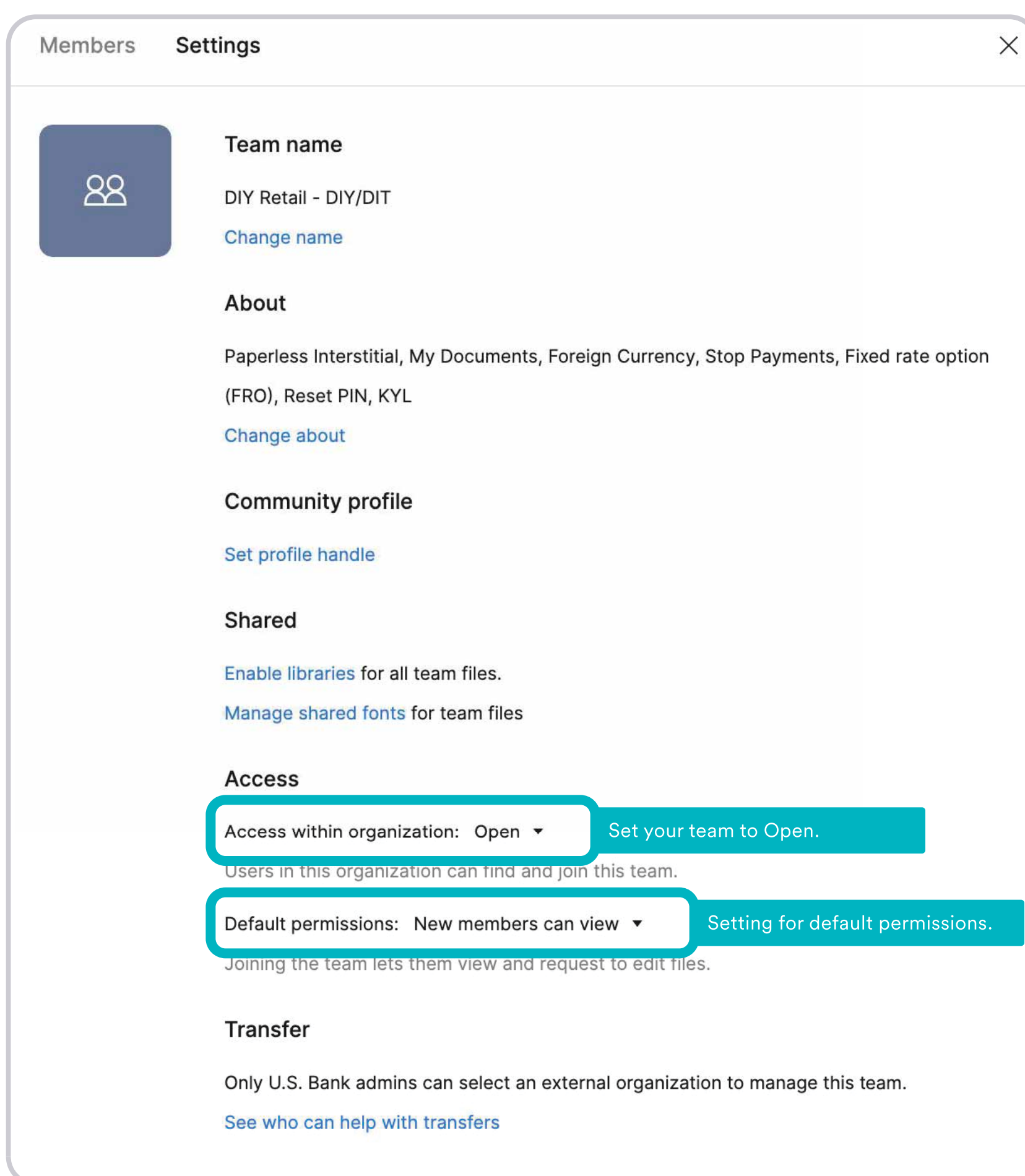
Team members tab



Set Team to **Open** unless there's a legal/confidentiality issue. Secret and Closed groups aren't searchable. See the **Settings tab**.

Default permissions should be set to **New members can view**. This way, if someone from outside your team joins, they won't be able to change your files unless you grant them edit access.

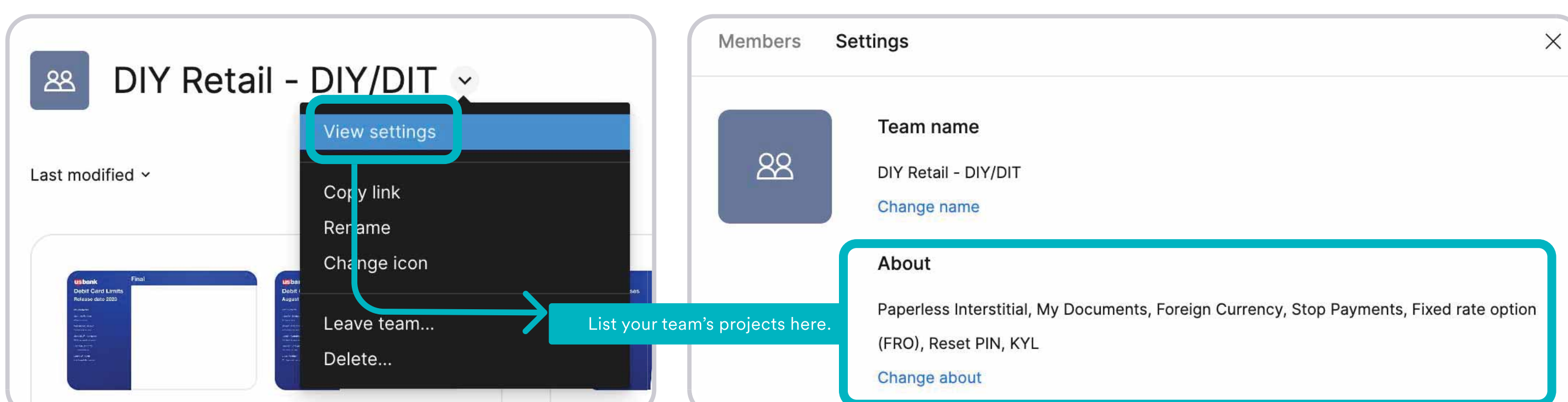
Team settings tab



Team 'About' section

Enter a brief description of your team's projects/products in the **About** section to let others grasp your work at a glance. This is especially helpful if your team name is a nickname that doesn't describe what you do (fix that!), or if your work has more than one focus.

View from team space (editable)



Setting up a project

Project name

Option 1 (preferred)

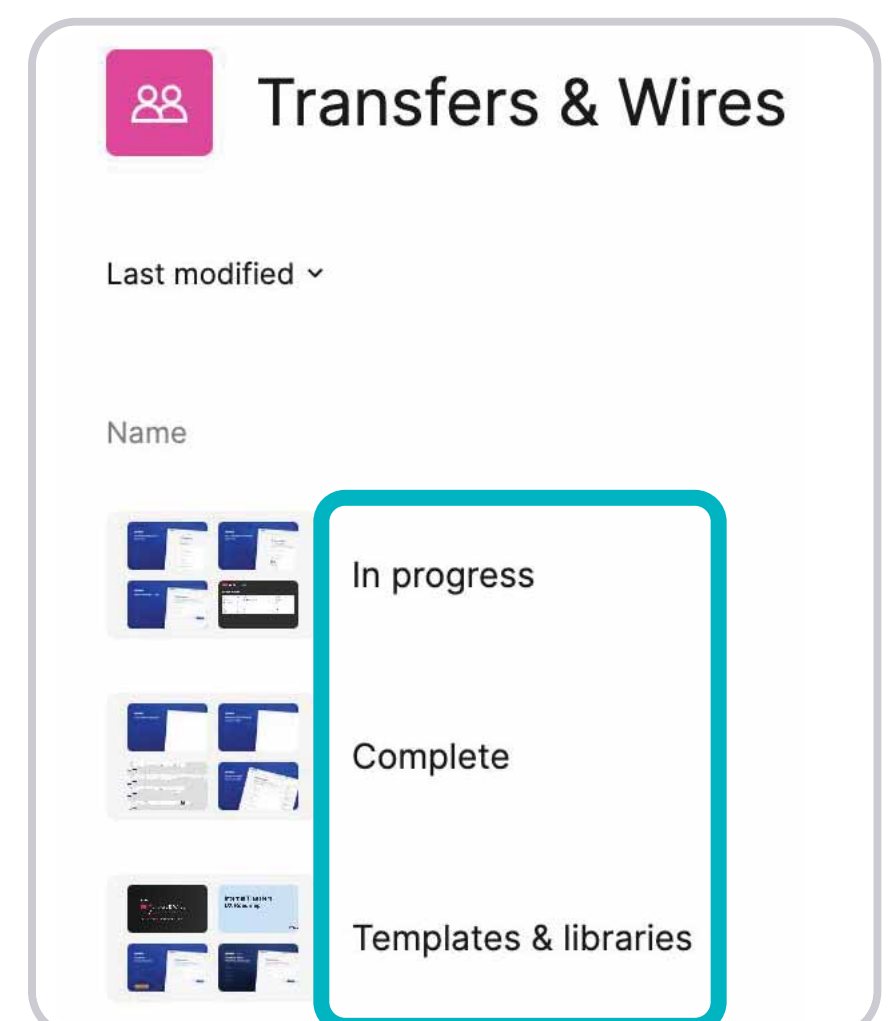
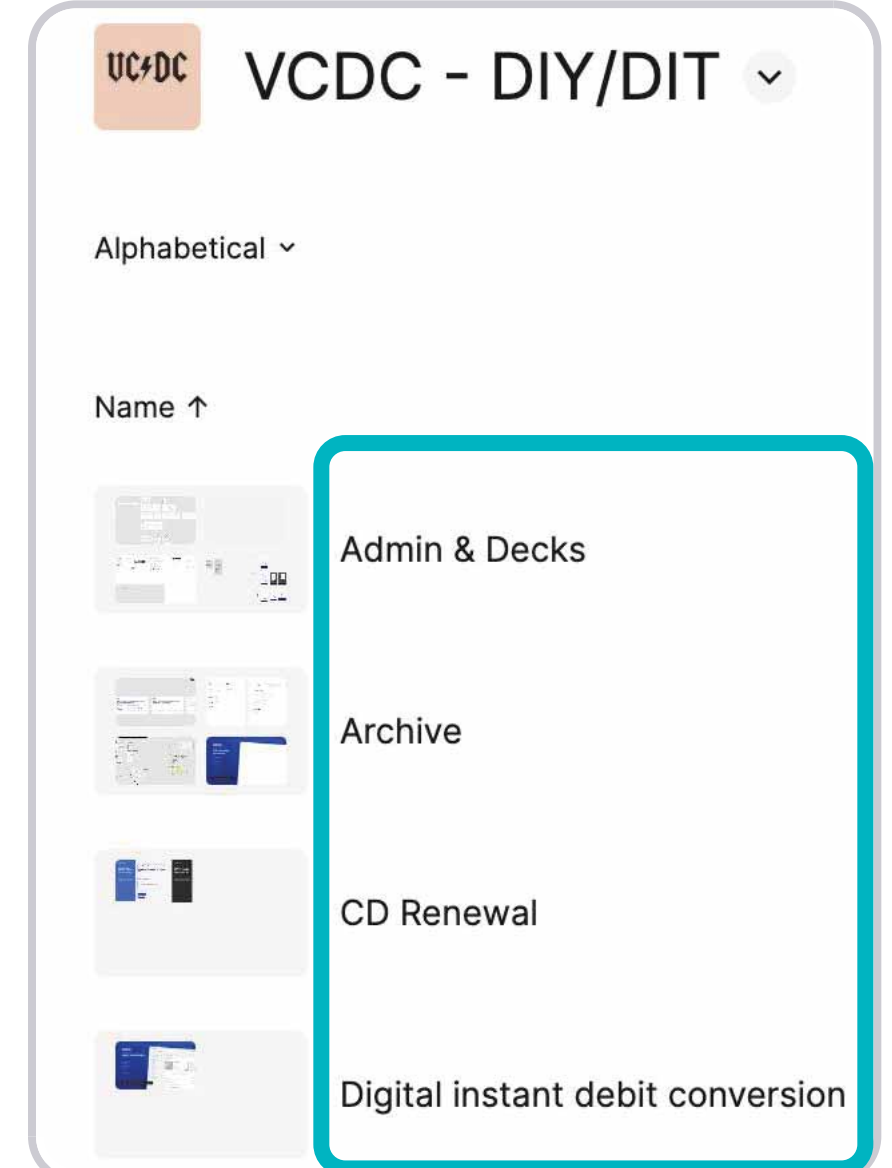
- Include name or description of product/project and, if pertinent, channel (such as Responsive or Native).
- Use supplemental categories, such as Templates & libraries, Archive or Research, as you prefer. (Also see the next section for guidance on Files.)
- Use dashes if needed to separate words or phrases.

Option 2 (for smaller teams or limited scope)

- Use status and categories (e.g., In progress, Complete, Templates & libraries, Archive, Backlog).
- If you have many, many Files under In progress, consider another Project structure, such as Option 1, grouping Files into descriptive categories and making new Projects for them.

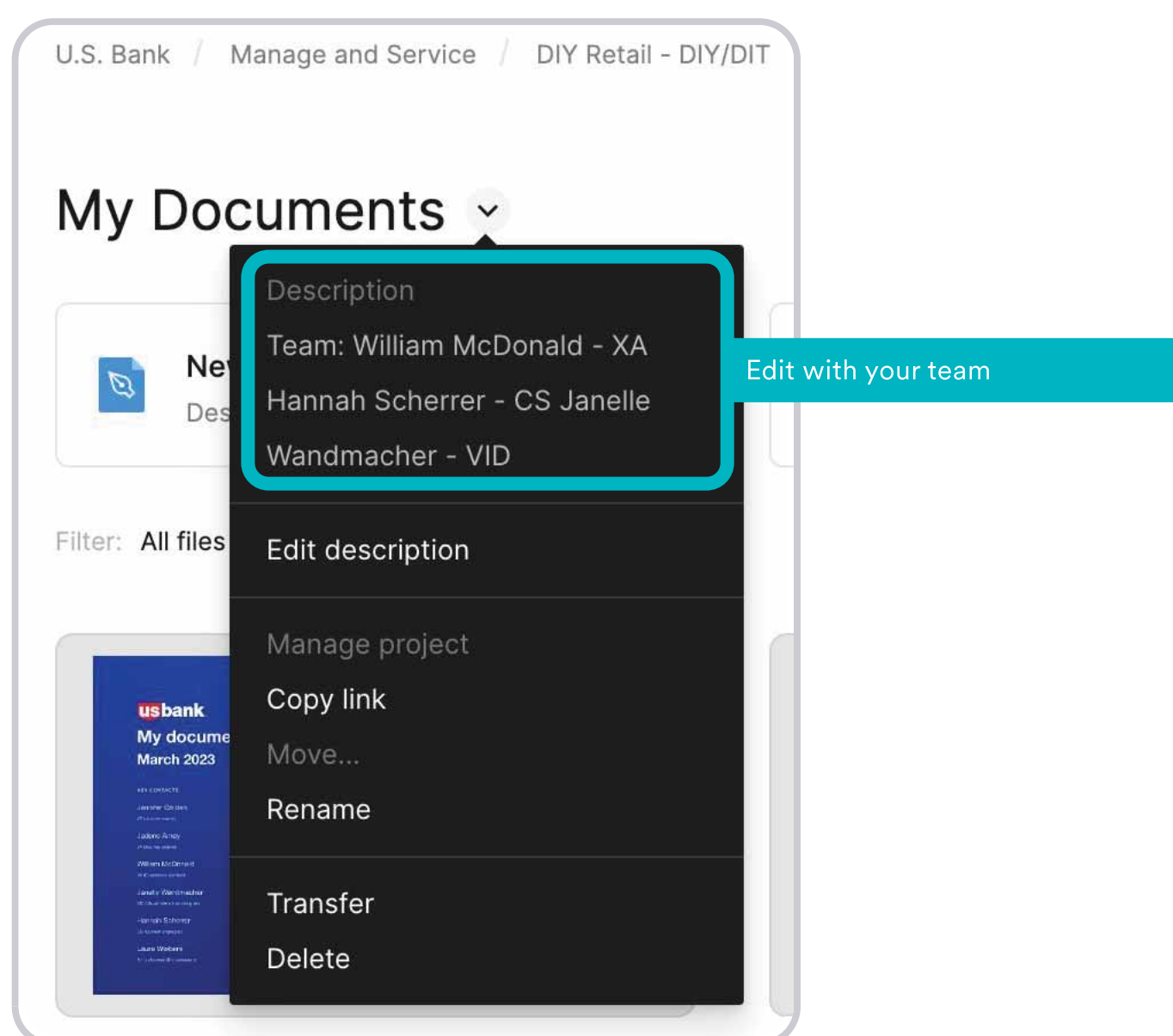
Do's and don'ts

- **Do** use Projects for ongoing products or projects to contain multiple specific files.
- **Do** use descriptive words. If projects are divided along team lines, be sure to use more than a nickname. (See Team name.)
- **Do** use spaces between words.
- **Don't** create a new Project every time you start a new File. Projects are intended to function like folders, and will typically contain more than one File.
- **Don't** repeat the name of your team in the Project name unless it's an important differentiator.



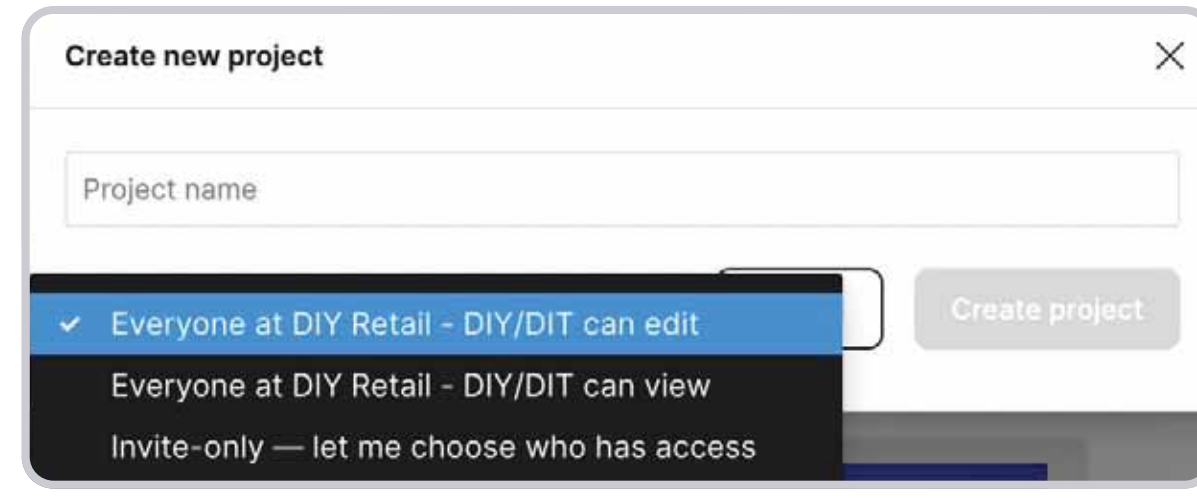
Project description

List design team members in the **Description** section. This makes it easier for those with questions to contact the right people.

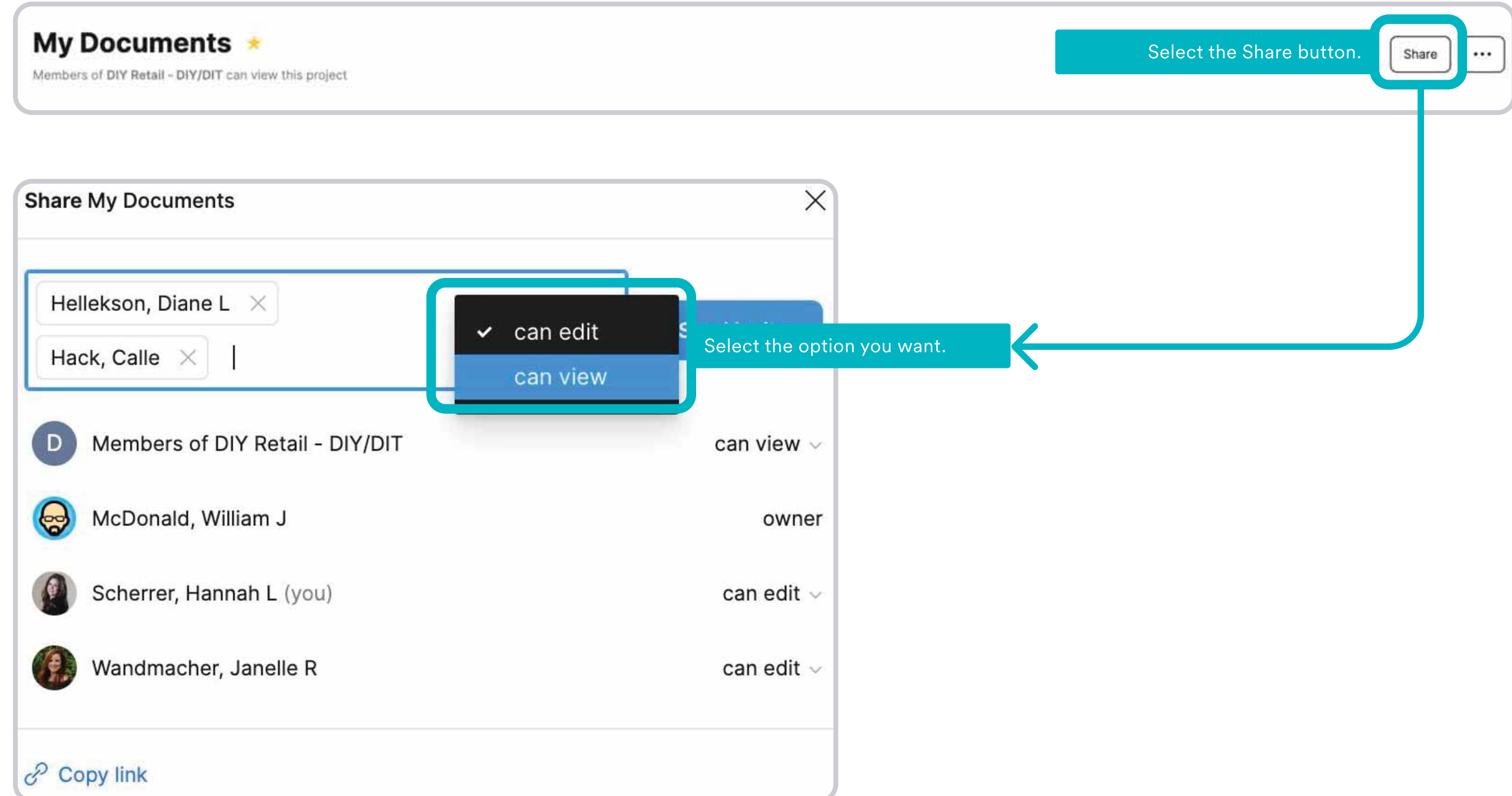


Access and share settings

When creating a new project, choose to give all members view access. Don't use invite-only as the project won't be searchable. After creating the project, manually update design team member access to edit.



To update an existing project's access settings, you can change them globally for all team members or update individual access:

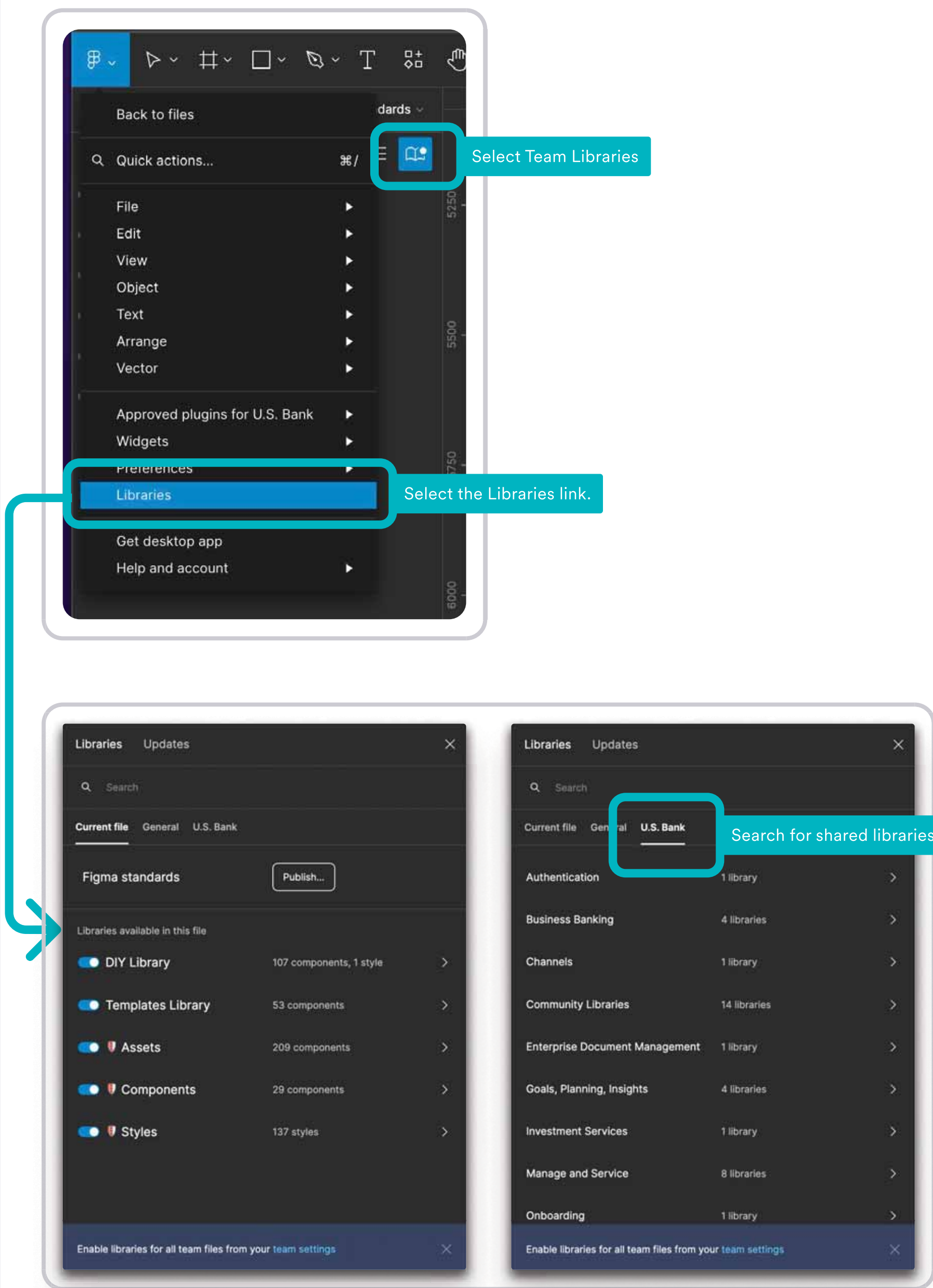


Linking shared libraries

A library lets you reuse components and styles across your design files. Using them helps reduce rework and can be easier than copying and pasting. They also help encourage consistency across teams and channels. Libraries can be added and managed either:

1. From the **Figma menu** select **Libraries**.
2. From the **Assets panel**, select the **Team Library** (book) icon.

The **Current file** tab lists your active linked libraries that you can toggle on and off. To access or link other shared team libraries, choose the **U.S. Bank** tab.



Creating files

File name

- **Do** start the name with a general word or phrase, followed by more specific descriptors (see format with examples below).
- **Do** make the name specific enough that viewers don't need to open to file to understand what it's about.
- **Don't** include team name in file name unless necessary to accurately describe your work.
- **Do** add the intended release month and year, if possible – year at minimum. For teams working on longer-term exploration, indicate what's current in page structure.

Format: <Status><Project name or abbreviation> <Sub-project (if applicable)> <web or native (if applicable)> <release date (Month yyyy)>

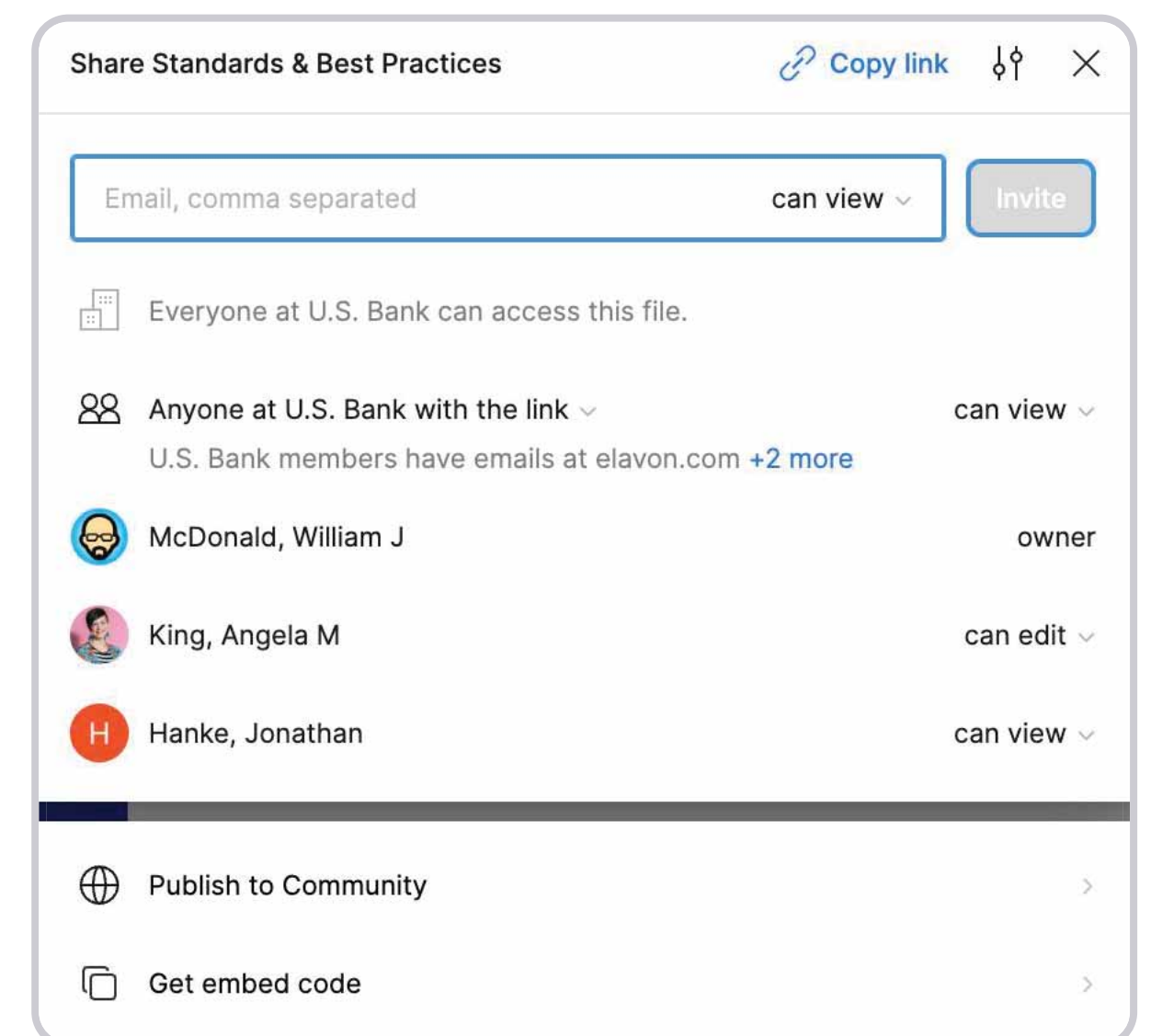
Examples:
 For an Option 1 project setup: WIP My documents – Order statement copy OLB March 2023
 For an Option 2 project setup: Auth Preferences – In progress _ Authenticate native – Q1 2022

Permissions and sharing

Permissions set at the team and project level aren't always inherited by files, so be sure to check that file permissions are set to Can view for **Anyone at U.S. Bank with the link**.

Access options

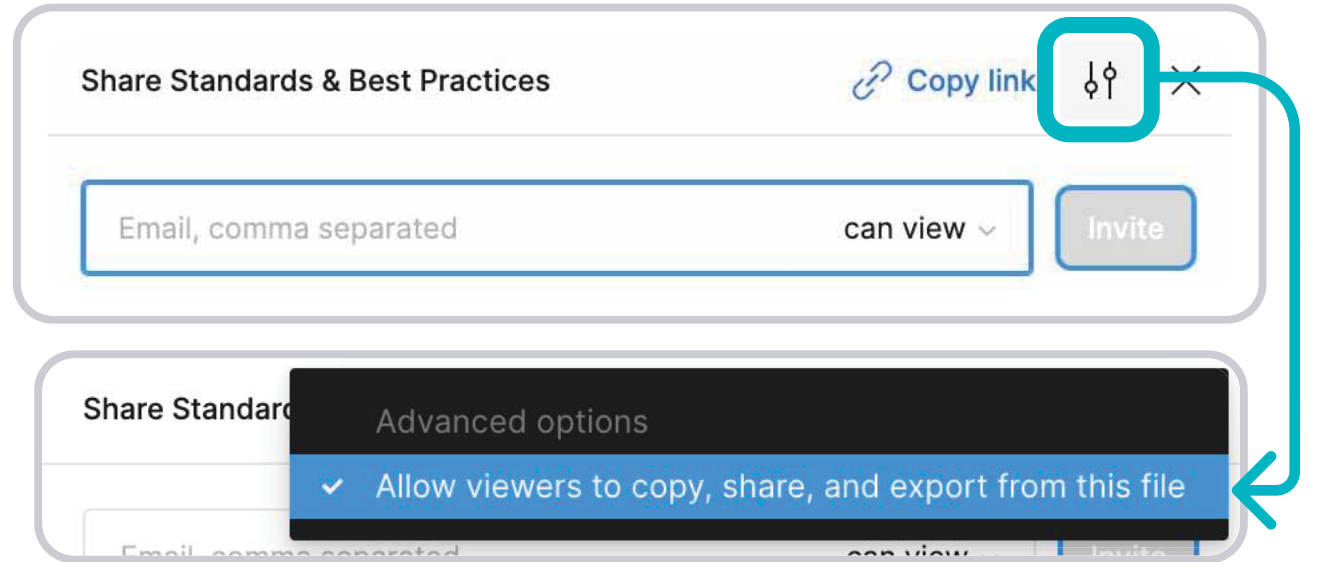
- **Owner** – Creator of the file, Admin by default.
- **Admin** – Can update permissions for others. Assign at least two per file to help prevent access issues when the owner is unavailable.
- **Can edit** – Can access all design tools, can't update permissions. Limit to UX Design creative team and collaborators (peer reviewers, research, A11y, etc.).
- **Can view** – Can access all file pages and leave comments, but can't change designs. Best for cross-functional teams.
- **Can view prototypes only** – Can only access prototypes and leave comments, can't view other pages or update designs.



Allow viewers to copy, share and export without edit access

Want to make collaboration easier? You can give those with view access the ability to copy, share and export from your file by updating your file's advanced settings.

1. Choose the settings icon in the upper right corner of the permissions modal.
2. Select "Allow viewers to copy, share and export from this file".



Sharing outside U.S. Bank using expiring public links

An [expiring public link](#) allows users to temporarily share links to Figma and FigJam files with people who don't have U.S. Bank/Elavon/Talech/TravelBank Figma accounts (such as research participants). After a set amount of time, the links expire and can no longer be accessed by external users. At most, expiring public links are available for 31 days.

Per U.S. Bank Information Security, expiring public links can only be used in the following situations:

- You are a UX researcher or a designer who has completed the research democratization training, and you are temporarily sharing prototypes with research participants.
- You are a designer who has approval to share links with an outside party (such as a third-party vendor who has a signed contract and NDA with the Bank). Approval can only be given by Laura Burke or Bernice Li via email.

All files that need to be shared externally (as part of a research study or otherwise) must be placed in the appropriate project in the workspace: [Research and External Sharing](#).

This feature should NEVER be used to share file links with personal email addresses or others outside of the Bank, unless given written approval to do so.

We will be auditing the use of expiring public links to ensure everyone is following these guidelines.

If you need to share a file with an external party that is not a research study participant, please email Laura Burke (laura.burke@usbank.com) and Bernice Li (bernice.li@usbank.com) with a brief explanation of what you are sharing externally and why.

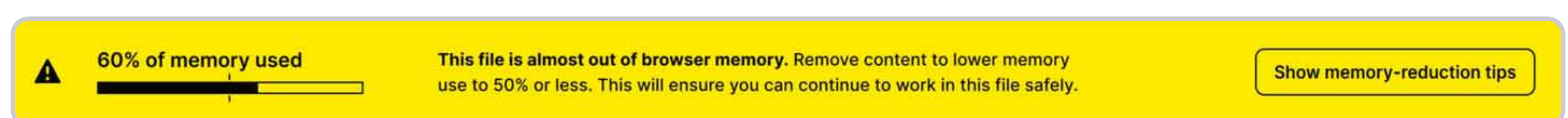
Expiring public link: Only employees with approval should use this setting. Those conducting research should share only the prototype, not the entire file.

Expiring public link with password: Only employees with approval should use this setting. Do not use for research prototypes.

Internal U.S. Bank link: Anyone can use these options to share a file with another employee.

Size

Overly large, complex files can diminish Figma's performance, resulting in slow loading or even data loss. Every browser has its own active memory limit of about 2GB per browser tab, so it's essential to keep your files well within that limit. Here's an example of a warning you might see:



How to fix an over-large file

- **Do compress images.** Figma doesn't compress by default, so be sure to do so before pulling images into your file.
- **Don't use BMP and RAW files.** If you have a great image in one of these formats, save it as a JPEG before pulling it into Figma.
- **Do split larger files into smaller ones.** Some designs are too complex to maintain a manageable file size. Split distinct sections or flows into separate files within your project and label them clearly.
- **Don't use pages as version history.** Duplicating pages for versioning will make the file grow exponentially with every release. Instead, duplicate the entire file, then rename it for each new release.

Hidden layers

If you're using hidden layers to switch between variations of a component, create a Boolean property. This allows you to toggle layer visibility (or other values) on and off.

For more help

See Figma's guide on [Reducing memory usage in files](#).

Organizing pages

Page structure

Why can't I just do what I want? You and your teammates aren't the only ones who'll be using your files. To ensure those who aren't familiar with your project can navigate, maintain a page structure similar to what you see below.

Note: Blank pages with a double slash // indicate a section or category. Remarks and options are in parentheses.

Cover

// Deliverables

Wireframes and annotations

User flows

Prototypes (Can also be a separate // section)

// Design

VID + content (or other working files)

// Project info

Documentation (Could instead be Reference. See Page content, below)

Research

Journey map

Slug or presentation (Complete in Figma or a link to another file)

// Exploration & discovery (Could also be under Design)

Sandbox

Note: Feel free to add more pages within these categories, keeping in mind that adding too many will slow your project down. Also be sure to clearly label new pages to avoid confusion among future team members or auditors.

Page content examples

Cover

- Project and file information
- Release date
- Status (such as WIP or approvals)
- Team members and other key contacts

// Deliverables can include:

Wireframes/annotations

- User flows
- Screen designs
- Annotations and notes to developers
- Content
- Translation
- Revision history
- Change notes

Prototypes

Keeping prototypes on a separate page (or in a separate // section) helps to ensure any changes to your working pages won't discombobulate your prototypes for presentations and reviews.

// Project info

Slug or presentation

- Design slug may have a page in the file or exist as its own file.
- Links to briefs, Confluence or Jira epics and stories.

Research findings

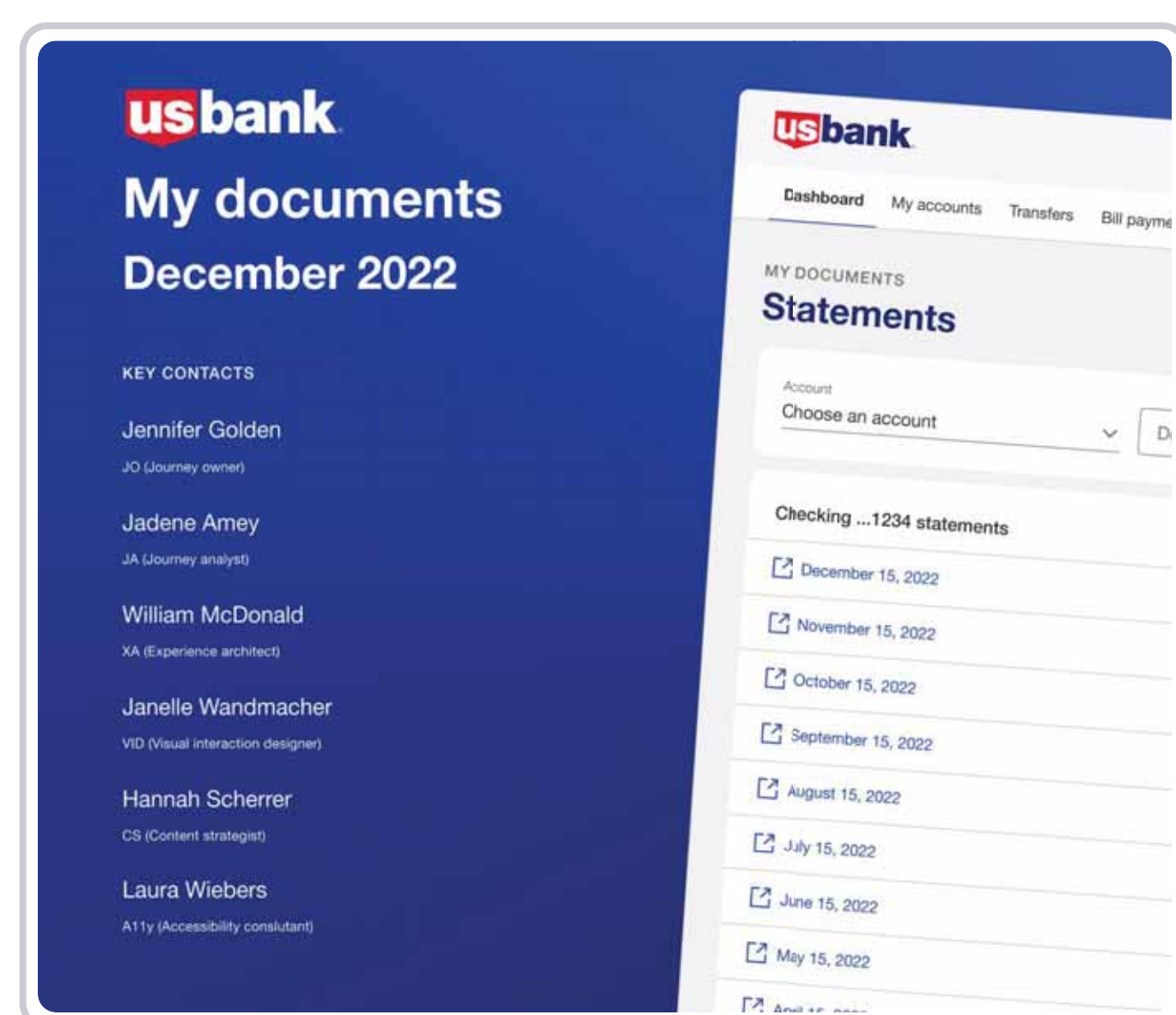
// Design

Visual design and content

- Screen components
- Primary content and any variants
- Translation
- Change notes
- Work in progress

Sandbox/exploration

- Work in progress
- Design exploration
- Content exploration



Resources

[Starter template - example file](#) >

Content in Figma

Use Figma as your single source of truth for content, unless you have an approved exception.*

A note about file ownership

In many cases, Experience Designers (XDs) will take the lead on Figma file setup. After that's done, the file becomes a shared document that both XDs and Content Experience Designers (CXDs) work in together. Teams should establish how they work in Figma and which library approach they follow, using methods outlined below.

*Some teams need to use a Microsoft Word or Excel file as their content document for various, approved reasons. If you believe your team needs an exception to using Figma as your content source of truth, clear it with your Head of Design and the Content COP leaders.

Adding and editing content

CXDs may use one of two methods for adding and updating copy in design files.

Basic: Add content directly in high-fidelity screens.

- Recommended use: Ideation sessions and experiences with simple, static content. You may also want to use this method as a starting point before creating content components.
- Content management: Non-library approach; see [Organizing and managing content](#) for details.

Advanced: Use content components.

- Recommended use: Complex and dynamic content, including translated copy. Files where copy is used on multiple screens, or multiple versions of the same screen.
- Content management: Choose either the internal or external content library approach; see [Organizing and managing content](#) for details.

Organizing and managing content

To avoid content mishaps, your team must agree on where final content lives. There are three ways we can manage our content assets:

The non-library approach (not recommended)

- CXDs manually enter and manage content in each high-fidelity design. This follows the basic editing method above.
- Why don't we recommend this approach? Unless your project is incredibly simple, this method leaves a lot of room for human error. If you use the same content in multiple places within your file, CXDs must manually update every instance of it individually.

The internal content library (aka the Scherrer-McDonald method)

- CXDs enter content into designated content components within the file. This follows the advanced editing method above. Organize these components into their own section or frame so everyone knows where they live.
- Recommended for: Content used across multiple screens within a file, or screens that have dynamic content options.
- Check out the [Demo document structure file](#) to see this method in action. The [Starter file template](#) is also set up for this type of content management.

The external content library (aka the single-source library or Qi method)

- CXDs enter content into designated content components in an external library file. This follows the advanced editing method above.
- Recommended for: Content utilized across multiple flows/files.
- Check out the [Single-source library file](#) to see this method in action, or these video tutorials:

[Shuyi's Single Source Library \(Design System\) - Part 1 \(Overview\).mov](#) >

[Shuyi's Single Source Library \(Design System\) - Part 2 \(Step-by-step\).mov](#) >

Auto layout and content

In order for these methods to work seamlessly, designs and components must use auto layout to account for changes in style and length of text as updates are made.

[Get more content tips and tricks in our Best practices](#) >

Figma Standards

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Figma and accessibility

Accessibility requirements

The [Digital Accessibility Standard \(PDF\)](#), referred to in the [Enterprise Accessibility Policy \(PDF\)](#), states that designers are responsible for designing (A11Y) compliant user experiences across DPs (Digital Properties).

To accomplish this, we ensure accessibility is considered and consult with each other. Some A11Y consultants and members of our teams have disabilities that may or may not be visible in nature. It is important that we make efforts to collaborate and share our work in an accessible manner. Keep in mind that Figma files themselves are not fully accessible to people of all abilities.

Sharing designs

You will often share designs in a small group or with a large audience. It is important that you describe your designs in these situations accessibly. The A11Y team has resources to learn more about [presenting accessibly](#) and [presenting assets accessibly](#).

Assistive technology

Some team members may use assistive technology like a screen reader. Screen reader software reads the content of the screen out loud. They may be used by people who are blind, have low vision, or have reading differences. Although, as of writing, screen readers do not currently work effectively with most Figma files, prototypes do work, but only if those files are built using best practices. Review the [Figma Best Practices](#) guide to learn how to optimize your prototypes for screen readers using standard best practices.

 [Continue to Version control](#)

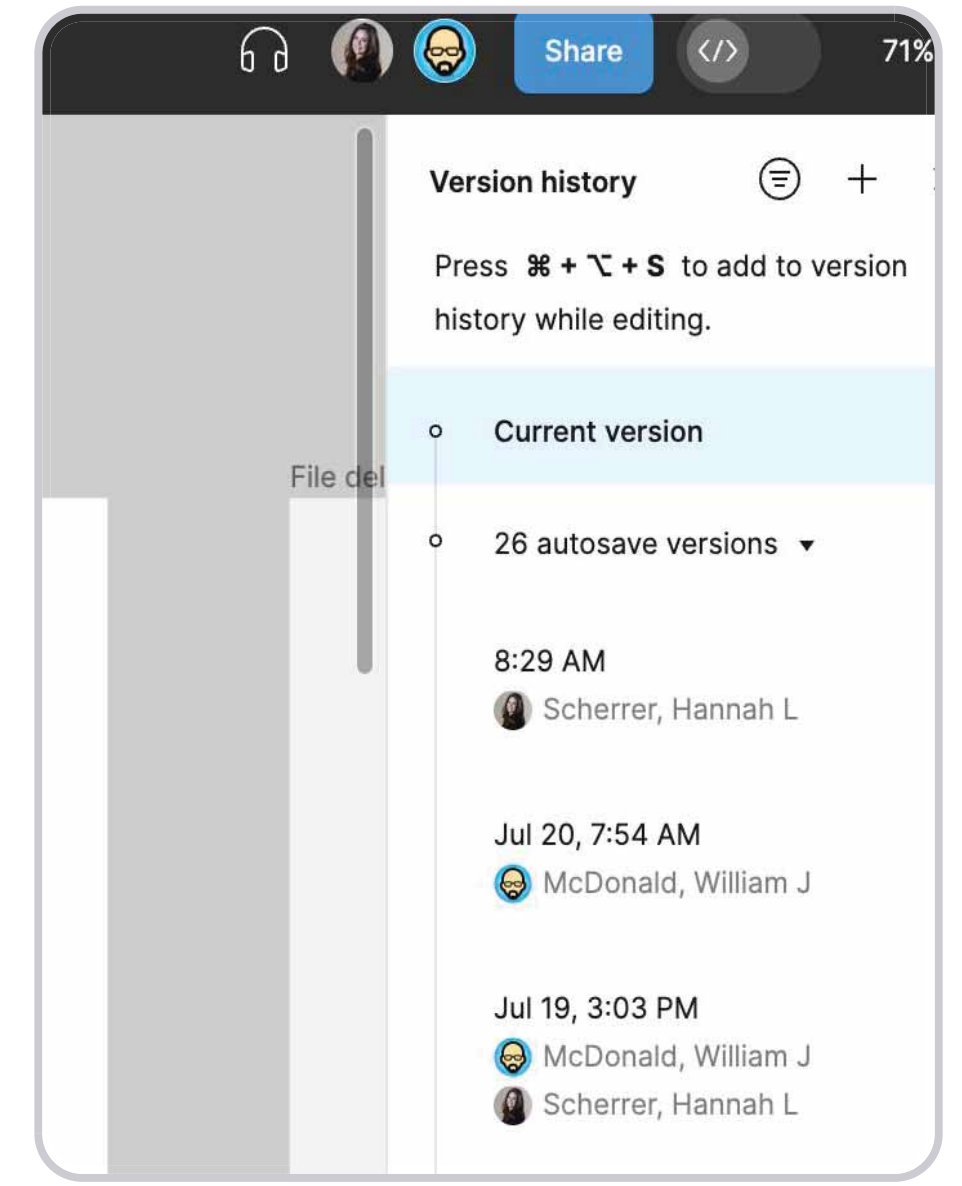
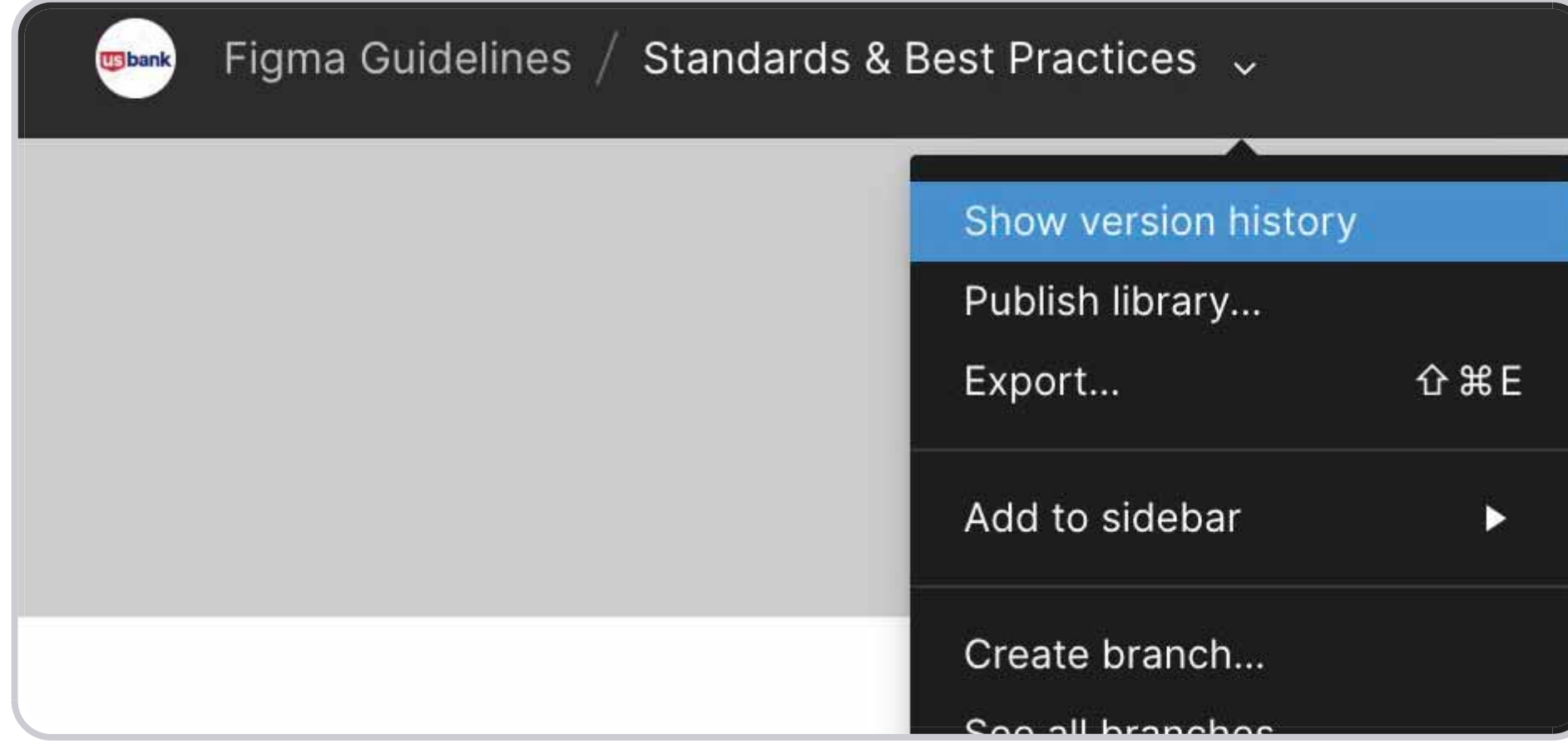
- [Home](#)
- [Teams](#)
- [Projects](#)
- [Files](#)
- [Page structure](#)
- [Content in Figma](#)
- [Accessibility](#)
- [Version control](#)
- [File delivery](#)
- [Go to best practices](#)

Tracking changes and versions

In-file tracking

Autosaved versions

Figma does the heavy lifting for you by autosaving a version of your file after every change. You can name a version at any point so it's easier to find later on. Learn more in our [Version History best practices](#).



Avoid using Pages as version history

Duplicating pages for versioning will make the file grow exponentially with every release. Instead, duplicate the entire file, then rename it for each new release.

Revision history

Keep a detailed revision history table (aka change log) in your final wireframe deliverable. This is useful for looking up who requested or approved changes and retrieving past versions, if needed. Consider creating a named version corresponding with any recorded points in a file's history. If feasible, put most recent updates on top of the table.

Include the following:

- Date changes were made or a PDF was created
- Screens/frames affected
- Jira story/epic number (if applicable)
- Brief description of change, including requester and/or reason
- Author of the change
- Impacted products (if applicable)
- Platform (for example, USB vs State Farm, if applicable)
- Date of CAT submittal (include approval number on cover)
- Date of other key reviews or approvals

Revision History					
Date	Version	Screen ID	Story/Epic	Change Description	Author
8/2/2022	0		September 2022 Release	Initial draft for October 2022	W McDonald
8/2/2022	1	2.1 Stop conv check 7.7.1, 4.8.1 review 5.3, 5.3.1 confirmation 7.4 disclosure	MS-15372	BEE change New product, convenience checks for LOC. added screens, new convenience check banker flow <i>Rescheduled for Q2 2023</i>	W McDonald
8/2/2022	1	Stop payment history	MS-15376	BEE change New product - convenience checks	W McDonald
8/2/2022	1	Stop payment history	MS-15366	BEE change New customer fields, new banker-only fields.	W McDonald
8/30/2022	1	3.0 Selected Merchant - Default	MS-13639	Updated Heading H2 content, added select helper text content, additional info with jump link.	W McDonald
8/30/2022	1	1.0 Stop payment	MS-16848	Updated first bullet content.	W McDonald
9/6/2022	1	7.2, 7.3 Stop payment	MS-16840	Removed all mention of amount in debit and credit disclosures from the first two bullets.	H Scherrer
9/23/2022	1	3.3 Merchant not listed	?	Added bullet point regarding joint account holders with multiple debit cards.	H Scherrer

Supplemental revision notes

Also make note of changes on individual frames or screens. For instance, if you noted a copy change in your revision history, include specifics of the update adjacent to the change. It can be helpful to include who requested the change if the decision was made outside your design team.

Versioning PDFs

Whenever you export portions of a Figma file to PDF, be sure to give it a version and a date and note this in the revision history. This helps ensure everyone is using the current version.

Resources

[Revision history template - example file](#) >

[Learn more about our Version history best practices](#) >

Delivering files

File delivery and storage is essential to ensuring that your deliverables can be easily found and leveraged by all. Speak to your team to confirm the preferred handoff method, whether that's sharing a Figma link in JIRA, uploading a PDF to Confluence, adding documentation to SharePoint or some other agreed-upon process.

🔔 Looking for guidance on sharing your file? Check out the [Permissions and sharing section](#).

Exporting to PDF

1. Remove all unnecessary drop shadows from your file.
2. Be sure all images are compressed.
3. Export your file as a PDF.

If the PDF is larger than 100MB, reduce it by following these extra steps:

1. Open in Acrobat.
2. Under the **File** menu, select **Export to > Postscript file**.
3. Right-click on the postscript file (wherever you've saved it), select **Open with > Acrobat Distiller**.
4. Run the postscript file through Distiller and voilà! You have a smaller file.

Don't have Acrobat or Distiller? Unfortunately, we have limited licenses. If no member of your team has access, ask your team or community of practice for help, then [submit a software request](#).

Sprint handoff

For teams delivering artifacts at the end of each sprint, use branching. You can do this in two ways:

Option 1

Create a branch when you've completed your sprint deliverables and label with your sprint number. Use this branch as a snapshot in time and review it with your devs while you continue your work in the main file. Archive your branch after you've completed your review.

Option 2

Create a branch when you've completed your sprint deliverables. Use this branch to continue your work without impacting the main file. A team branch can be created or individual contributors can work in their own branches. At the time of delivery, review the work as a team and merge the changes into the main file, as appropriate.

End of release

For each new release, a final wireframe must be maintained, unchanged, for at least seven years. To comply with Corporate Audit and Risk policies, follow these steps before updating a file that's gone to production:

- Duplicate your current file.
- Replace (Copy) with (Final). This is now your audit-friendly version. To help ensure no changes are made to this file, change access to Can view (not edit) for all but owner/admins.
- Update the name of the original file to reflect your next release date and update the status on the cover page to Work in progress.

Sharing files

For each new release, a final wireframe must be maintained, unchanged, for at least seven years. To comply with Corporate Audit and Risk policies, follow these steps before updating a file that's gone to production:

- Duplicate your current file.
- Replace (Copy) with (Final). This is now your audit-friendly version. To help ensure no changes are made to this file, change access to Can view (not edit) for all but owner/admins.
- Update the name of the original file to reflect your next release date and update the status on the cover page to Work in progress.

[Learn about our File delivery best practices](#) >

Revision history

Date	Screen ID	Description	Author
04/07/2023	Accessibility	Added accessibility standards per the A11Y team.	W McDonald
10/06/2023	Creating files	Added instructions for updating advanced settings in file permissions.	H Scherrer
10/25/2023	Creating files + File delivery	Added instructions for sharing expiring public links.	H Scherrer
4/11/2024	Accessibility	Updated policy and standard PDF links.	H Scherrer

Select the columns you need from the design panel before detaching.

Press Command + D to add a row