



NAME LIST

YOUR GUIDE TO USING eDESIGN

The name list helps you ensure correct name spellings, record yearbook sales, track student coverage, electronically market books and ads, and more. This document guides you through setting up a name list and provides best practices for maintaining and using the name list.

STEPS FOR INITIAL SETUP

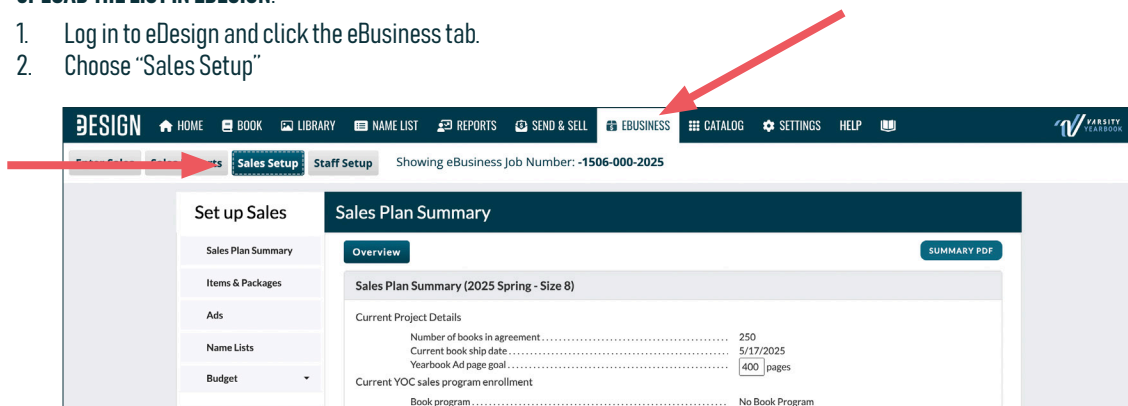
1. OBTAIN A STUDENT LIST FROM YOUR SCHOOL OFFICE.

The name list should be an Excel spreadsheet (.xls or .xlsx) or a comma-separated text file (.csv). If your names include accent marks, use an Excel file. The name list should have separate fields for each piece of data listed below:

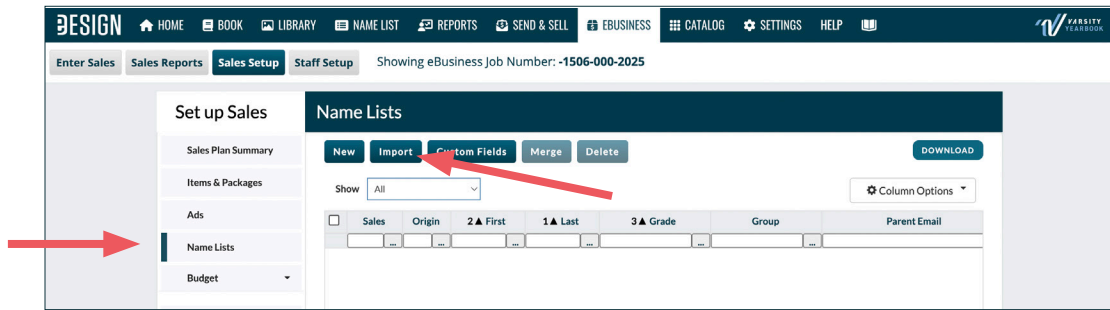
- **FIRST NAME** – required for all name lists
- **LAST NAME** – required for all name lists
- **GRADE** – required for all name lists
- **STUDENT ID #** – optional but strongly recommended to help keep your people data as accurate and clean as possible
- **MIDDLE NAME** – (optional) differentiates students with identical first and last names
- **TEACHER** – (optional) a teacher designation (e.g., homeroom) can be helpful
- **PARENT EMAIL ADDRESS** – required for using Send and Sell to promote sales and for participation in Sales Assist
- **STREET ADDRESS** – only required for mailing postcard with Sales Assist
- **CITY** – only required for mailing postcard with Sales Assist
- **STATE / PROVINCE** – only required for mailing postcard with Sales Assist
- **ZIP / POSTAL CODE** – only required for mailing postcard with Sales Assist

2. UPLOAD THE LIST IN EDESIGN.

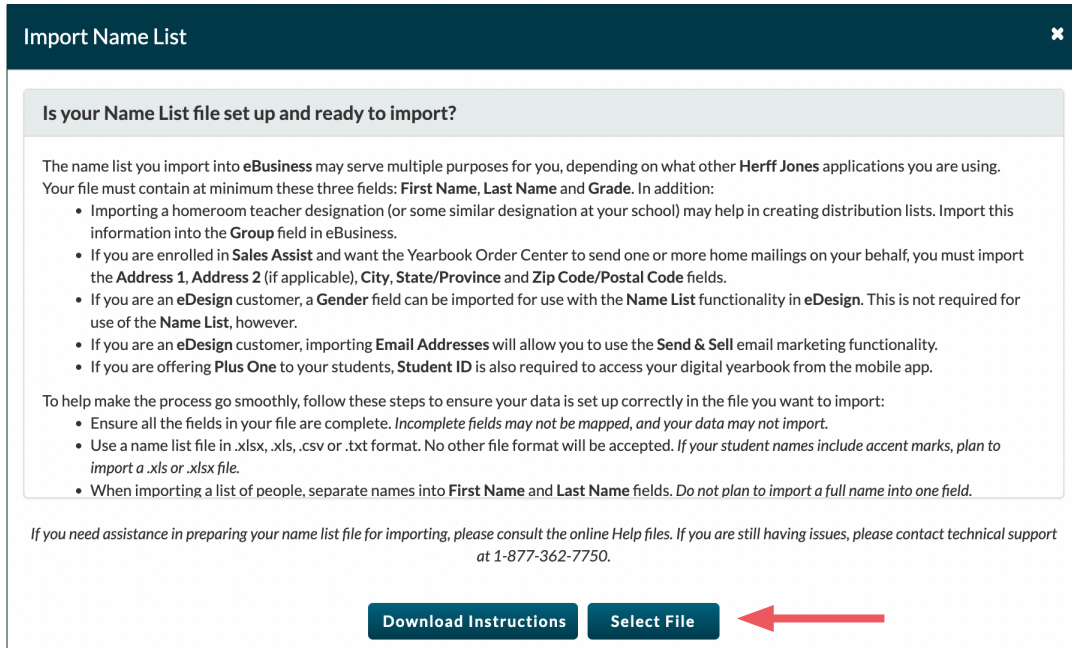
1. Log in to eDesign and click the eBusiness tab.
2. Choose “Sales Setup”



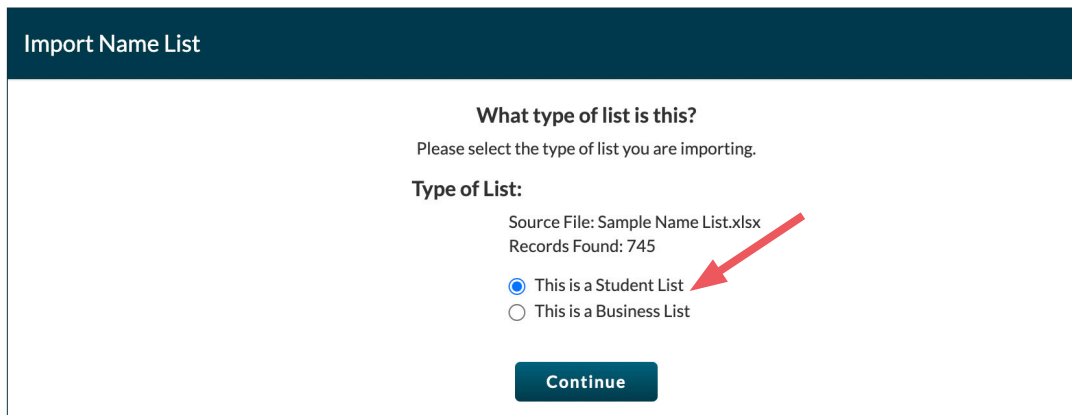
3. Click on the side tab for "Name List" and then choose "Import"



4. Click on "Select File" and browse for your file to select it.



5. Select "Student List" and click Continue.



6. Click the column headings and select the appropriate designation for each column. You must map fields for **First Name, Last Name and Grade**. We strongly recommend also including a **Parent Email and Student ID number**. We discourage you from including middle names unless used to differentiate students with identical first and last names. When finished, click "Confirm." Then review your mapping choices and click "Import."

Import Name List ✕

Map the selected list's field data

Before importing the selected name list, you must designate the column names. Select **Don't Import** to skip columns you do not need. **First Name, Last Name and Grade are required fields** to finish the import. Click **BACK** to change the type of list you are importing. Source File: Sample Name List.xlsx
Records Found: 745

Last Name	First Name	Don't import	Grade	Student ID	Parent Email
Last name	First name	Middle name	Class of	Student ID Number	Parent Email address
Anderson	Amanda	Marie	9	202345671	bluewave123@example.com
Baker	Sidi		9	202178934	starrynight55@example.org

7. If prompted with the screen below, choose the **third option** to update names and add new ones. Click "Continue".

Import Name List ✕

Your list is ready to import

You already have names in your list. How do you want to handle this import?

Import Options:

Source File: 7572 Name list.xls
Records Found: 11

- Add new names only
Best choice if the names currently in your list were added manually or through sales. This will ignore names already in the system and only add those that are new.
- Update names already in the list only and discard any new
Best choice if the names currently in your list were imported from another list. Only names that match the required fields will be updated and ignore all others.
- Update names already in the list and add any new
Only names that match the required fields will be updated and all others will be added. This option is most likely to produce duplicates.

*Please make sure the required fields match the previous import to avoid duplicates

Duplicate names should be addressed before updating records currently in the list as they will be ignored.

Back
Continue

8. SYNC THE LIST TO eDESIGN.

After uploading your name list to Sales Setup, wait 15 minutes for our database to securely process this information. Click the Settings tab in eDesign and choose **School & Order Information > Name List**. Check the box indicating that you have imported your list, and then click "Import Name List." This will load all names into the Name List tab in eDesign where you can edit those names as needed and add new ones as the year progresses.

eDESIGN HOME BOOK REPORTS LIBRARY NAME LIST SEND AND SELL CATALOG SETTINGS HELP

Settings

- Staff Setup
- School & Order Information
- School Address
- Order Information
- Additional Options
- Name List
- Topics
- Design Styles
- Deadlines
- Custom Dictionary
- Coverage Report Settings
- Export Settings

School & Order Information

Name List Import

Import your Name List of Students & Staff

The Name list enables eDesign to check the spelling of student names and to enable the name-tagging of images. You must upload the complete roster of all students through My HJ Yearbook before you can import the list into eDesign. You can download instructions for the correct formatting here.

After the Name List is uploaded through My HJ Yearbook, it will take about 15 minutes for the list to become available for import into eDesign. If you click the import button below before this time, no names will be imported.

NOTE: This is intended to be a one-time operation. Verify that the correct and complete Name List has been uploaded through My HJ Yearbook. Contact your TSA for assistance or to delete an imported Name List.

I have imported the correct and complete roster of all students and staff through My HJ Yearbook.

Import Name List

NAME LIST TIPS AND BEST PRACTICES

- **IMPORT YOUR NAME LIST BEFORE YOU BEGIN BOOK SALES.**

Doing this saves you time and promotes accuracy. When you record sales in eBusiness or when parents purchase book via the Order Center, the order will be accurately matched with a name in your name list. It prevents parents from manually typing names.

- **EDIT PREFERRED NAMES IN eDESIGN.**

Change a student's name to their "preferred name" in eDesign's Name List. This is where you would change "Michael" to "Mike" or "Soo Chin" to "Grace," for example.

- **EDIT NAMES IN eDESIGN EARLY IN THE YEAR.**

You should edit the Name list in eDesign to reflect "preferred names" (the way you want names to appear in the yearbook) early in the year so that as you create pages, you can use the Name Check function to ensure names are spelled correctly and consistently.

- **IF YOU NEED TO ADD NEW STUDENTS, ADD THEM TO eDESIGN'S NAME LIST**

If you need to add new students to the name list (students who have been added after the beginning of the year, for example), it's best to add them to the name list in the Name List tab of eDesign.

- **KEEP IN-SCHOOL SALES UPDATED IN eBUSINESS.**

To use Send and Sell accurately and to use the full features of eDesign's Coverage Report, you should record all in-school sales in eBusiness on a regular basis. Click the "Enter Sales" button inside of the eBusiness tab of eDesign to record these purchases.

- **USE NAME CHECK ON PAGES.**

One of the most powerful uses of eDesign's Name List is the Name Check function. Name Check highlights names on pages that don't match any name on the Name List and allows you to quickly and easily correct the spelling. See the topics on Name Check in eDesign Help for more information.

- **TAG IMAGES WITH NAME TAGS.**

The Name List in eDesign creates a system of name tags you can use to identify people in photos. Images tagged with names can drive the Coverage Report and the index and can be used with the Build Caption function to create quick caption starters with correctly spelled names.

PORTRAITS AND THE NAME LIST

- **NAMES IN PORTRAIT LIBRARY ARE MOST LIKELY THE STUDENTS' LEGAL NAMES.**

When you import portraits, the names are those your school provided to your photographer. Therefore, when your photographer prepares the PSPFI file, the names in the Portrait Library will not match those you have edited in the Name List.

- **EDIT NAMES IN THE PORTRAIT LIBRARY, NOT ON THE PAGES.**

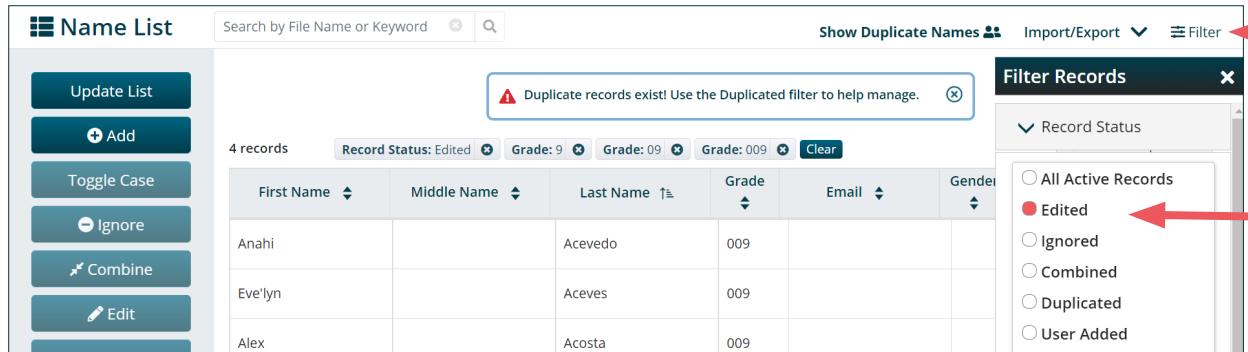
It is always best to edit portrait names in the Portrait Library—not on the actual pages. That way, if you need to re-flow the portraits, the name that flows will be accurate. If you change portrait names on the pages, these edits will not be retained if you need to re-flow portraits.

The screenshot shows the eDesign software interface. At the top, there is a navigation bar with the following items: DESIGN, HOME, BOOK, REPORTS, LIBRARY, NAME LIST, SEND AND SELL, CATALOG, SETTINGS, and HELP. Below the navigation bar, there is a search bar with 'Last Name' and 'First Name' fields, and a 'Grade' dropdown menu. There are also buttons for 'Import/Export', 'Filter', and 'Sort'. Below the search bar, there are several icons for 'Candid', 'Portraits', 'Templates', 'Mods', 'Art', 'Create & Share', and 'Ads'. The main area of the interface displays a grid of 2296 portraits. One portrait is selected and highlighted with a blue border. To the right of the grid, there is a 'Preview' window showing a close-up of the selected portrait. Below the preview, there are buttons for 'Delete', 'Refresh', and 'Undo'. At the bottom of the preview window, there are text input fields for 'FIRST NAME: Emily', 'LAST NAME: Thomas', a dropdown menu for 'GRADE: STA', and a text input field for 'TEACHER/OTHER: (none)'. A red arrow points to the 'LAST NAME' field.

EDIT THE PORTRAIT NAMES TO REFLECT THE PREFERRED NAMES USING THE PROCEDURE BELOW.

If you've taken the time to edit your Name List to reflect student's preferred names, here's an easy way to make sure you also make those changes to the portraits.

1. Click the Name List tab in eDesign.
2. Click on the Filter drop down menu, and select "Edited" to bring into view only the names you've edited.
3. Go to the Import/Export menu and choose Print View to create a printable list of edited names. Print it as a guide for editing portraits.
4. Then go to Library > Portraits. Search for the names you need to change and edit them in the preview panel.



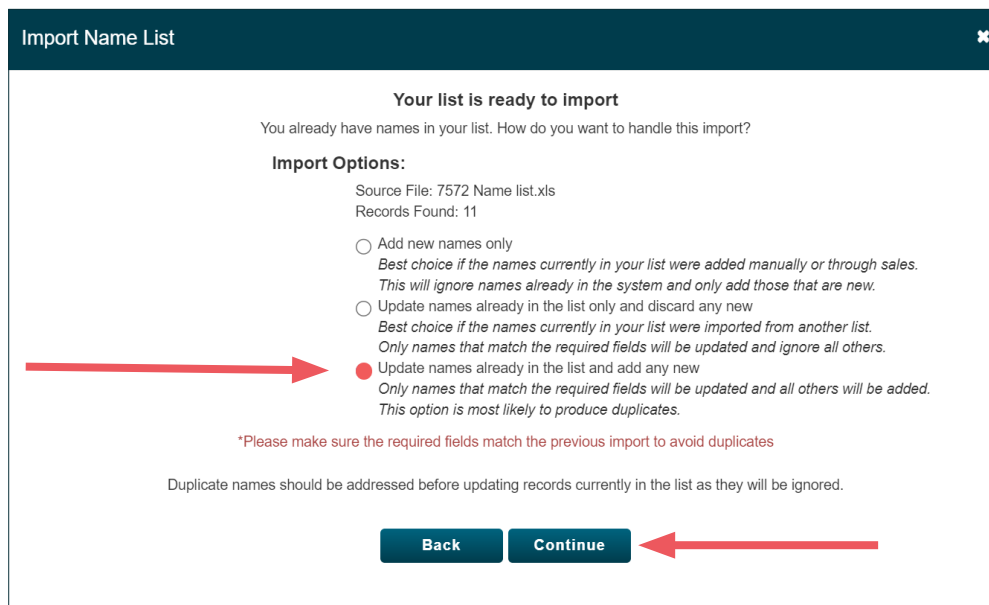
The screenshot shows the 'Name List' interface. At the top, there is a search bar and a 'Filter' dropdown menu. A notification banner states 'Duplicate records exist! Use the Duplicated filter to help manage.' Below this, a table displays 4 records with columns for First Name, Middle Name, Last Name, Grade, Email, and Gender. The 'Filter Records' dropdown menu is open, showing options: All Active Records, Edited (selected), Ignored, Combined, Duplicated, and User Added. Red arrows point to the 'Filter' menu and the 'Edited' option.

First Name	Middle Name	Last Name	Grade	Email	Gender
Anahi		Acevedo	009		
Eve'lyn		Aceves	009		
Alex		Acosta	009		

UPDATING A NAME LIST

After uploading a name list to Sales Setup inside of eBusiness, you can update the existing name list any time during the year to add new names or to add new data fields (e.g., Student ID, email addresses, name changes, etc.). To update an existing name list, you'll repeat the steps listed earlier in this document. Be sure to **choose the third option** and tell eDesign to update existing matches and add new names.

IMPORTANT: If you are unsure of how to do this, please contact our TSAs and let us help you. The names in your Name List and the actions they help you perform are so important, and we'd rather err on the side of caution by letting us guide you through things if you are unsure. Don't hesitate to reach out to us by [clicking here](#) and sending us your information; we'll get right back to you to help you with each step. ybk.link/techsupport



The screenshot shows the 'Import Name List' dialog box. It displays the source file '7572 Name list.xls' and 'Records Found: 11'. Three import options are listed, with the third option selected. A red arrow points to the selected option. Below the options, a note states: '*Please make sure the required fields match the previous import to avoid duplicates'. At the bottom, there are 'Back' and 'Continue' buttons, with a red arrow pointing to the 'Continue' button.

Your list is ready to import

You already have names in your list. How do you want to handle this import?

Import Options:

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Records Found: 11

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Back **Continue**