



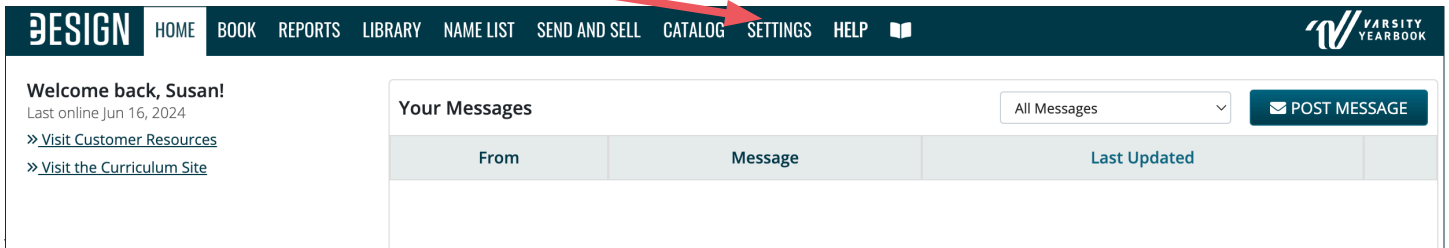
SETTINGS

YOUR GUIDE TO USING eDESIGN

Settings is the one-stop-shop for advisers and editors to set up eDesign. Inside Settings, leaders make decisions, establish limitations, and customize parameters for the book. Plus, advisers use Settings to create new staff members and to edit staff roles.

WHERE TO ACCESS SETTINGS

Settings is a menu item between Catalog and Help.



WHO HAS ACCESS TO SETTINGS?

Only advisers and editors have access to Settings, and when inside Settings, only advisers have access to some of the areas.

WHAT TO DO IN SETTINGS

The subsequent pages explain each area of Settings, but as an overview, here's a list of what advisers and editors do in Settings:

Staff Setup	1. Staff Setup (Advisers only) – Create new staff members and manage staff roles
School & Order Information	2. School and Order Information – See basic info about your yearbook; import your name list into eDesign
Topics	3. Topics – Add, delete and edit page topics
Design Styles	4. Design Styles – Activate fonts, create swatches, set page design preferences, and create character styles
Deadlines	5. Deadlines – Create and edit staff deadlines to assign to pages in your ladder
Custom Dictionary	6. Custom Dictionary – Add words to the dictionary so Spell Check and Name Check won't flag them
Coverage Report Settings	7. Coverage Report Settings – Customize the parameters of your coverage report
Export Settings	8. Export Settings - Transfer staff, fonts, colors, character styles, and topics to next year's book
Index Preferences	9. Index Preferences - Set preferences for what eDesign tracks for Index Builder

STAFF SETUP



Staff Setup is accessible to advisers only.


- To create a new staff member, click Add. To edit a staff member, click on the staff member's name and then click Edit.
- When you are finished, click "Add Staff" or "Edit Staff" at the bottom of the window to save the changes.

Staff Setup

Username & Passwords

Here you can add, edit or remove staff members. As you work in your ladder, you can assign them to pages.

 Edit  Add

First Name	Last Name	Role	Projects	
Jamie	Abeyta	Staff	2022 YEARBOOK-MAINBOOK	
			2019 YEARBOOK-MAINBOOK	
			2018 YEARBOOK-MAINBOOK	

Add Staff

*First Name:

*Last Name:

A Email:

B *Username:

a-z lowercase only
digits 0-9 and hyphen(-)
min 5 characters and max of 30

C *Validate with: Email Temporary Password

*Temporary Password:

minimum of 16 alphanumerical characters with standard special characters (no spaces) only good for a one-time log-in for account setup

*Role: **D** Can edit all pages

Access projects

2025 Y IS FOR YEARBOOK-MAINBOOK

2024 Y IS FOR YEARBOOK-MAINBOOK

2023 Y IS FOR YEARBOOK-MAINBOOK

2022 Y IS FOR YEARBOOK-MAINBOOK

2021 Y IS FOR YEARBOOK-MAINBOOK

2020 Y IS FOR YEARBOOK-MAINBOOK

A EMAIL ADDRESS

Adding an email address is only necessary when creating a new adviser. For staff and editors, it's only necessary if you want them to set up their account via email instead of a temporary password.

B USER NAMES & PASSWORD

Passwords must meet these parameters:

- all lowercase
- no spaces
- minimum of 16 characters

Pro Tip — Think of your password as a pass phrase like "sherrylovesyearbook!"

C VALIDATION

When you build a new user, they will set up their own password and security questions to help them get back in if they are locked out for any reason. You can opt to have our system send them an email, or you can provide a temporary password to them. When they enter eDesign for the first time - either via the email's link or the password you provide - they will set up their own pass phrase and set up 3 security questions.

Add Staff

*First Name:

*Last Name:

Email:

Email:

*Username:

a-z lowercase only
digits 0-9 and hyphen(-)
min 5 characters and max of 30

E *Password:

minimum of 16 alphanumerical characters with standard special characters (no spaces) only good for a one-time log-in for account setup

*Role: Can edit all pages

Access projects

2025 Y IS FOR YEARBOOK-MAINBOOK

2024 Y IS FOR YEARBOOK-MAINBOOK

2023 Y IS FOR YEARBOOK-MAINBOOK

2022 Y IS FOR YEARBOOK-MAINBOOK

2021 Y IS FOR YEARBOOK-MAINBOOK

2020 Y IS FOR YEARBOOK-MAINBOOK

staff members

Email Temporary Password

D "CAN EDIT ALL PAGES"

If you check that box, eDesign will give that users editing rights to all pages. You can do this for editors and staff members alike.

When on the ladder, you have the ability to remove editing rights for the user on individual pages if needed.

If you make any pages in your book "Secret", be sure to remove editing rights for those pages.

E PASSWORDS WHEN EDITING

To protect passwords, when you edit a user, you will not see the password. You can always reset a student's account by giving them a new temporary password; they'll once again set up their own new password and security questions.

Clicking the eye icon in the password field will help you see what you're typing, and the icon to the right of the password field will copy what you've typed, too - all shortcuts to help make your job easier.

SCHOOL & ORDER INFORMATION*

ORDER INFORMATION - This is not editable data. It is information that is populated by the plant's database for your quick reference. Note this is an easy place to grab your school's custom URL to the Yearbook Order Center. You can provide this to families for online sales of both books and ads, and it will bypass the need for them to enter a code.

NAME LIST - First import your name list into eBusiness via the eBusiness tab right inside of eDesign. Wait 15 minutes for our server to process this list, and then come

The screenshot shows the 'Settings' page in the eDesign interface. The 'School & Order Information' section is active, and the 'Order Information' tab is selected. The page displays various order details and a table of plant deadlines.

Order Information

Below you'll find your current order information on file at the plant. If you have questions about this information, contact your yearbook representative or your customer service adviser at 1-800-255-6287.

Job Number: -1506-000-2025

Book Size: 8

Copy Count: 250

Page Count: 156

Ship Date:

YOC Direct Link: <https://www.yearbookordercenter.com/index.cfm/job/-1506>

Plant Deadlines: **Total Pages: 156**

Date	Pages
November 18, 2024	44
December 23, 2024	44
February 03, 2025	44
March 24, 2025	24

back to Settings and click "Import Name List." These two actions will replicate your list in two critical places: Where people will purchase the book and you will record sales and where you will be building the pages of your book.

The screenshot shows the 'Settings' page in the eDesign interface. The 'School & Order Information' section is active, and the 'Name List Import' tab is selected. The page provides instructions for importing a name list of students and staff.

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 the eBusiness tab before you can fully import the list into eDesign. You can download instructions for the correct formatting here.

After the Name List is uploaded through eBusiness, 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 eBusiness. 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 the eBusiness tab

[Import Name List](#)

*NOTE: the options in this area will differ based on your book type.

TOPICS

This is one of several places in eDesign where you can create page topics for tagging photos and assigning to pages.

- A** We've included a list of common yearbook topics on the left side. If you need ideas to invigorate your book, feel free to peruse this list.
- B** To add topics to your book, either type your topic in the Search/Add field. You can hit Enter or click on the plus button to add it, or you can check the box under Suggested Topics. As you type, the topics will dynamically filter making it easy for you to simply check the box to activate it if you'd like, and you can edit it after you activate it if you want to change the way its worded or spelled.
- C** "My Topics" are the ones you've added or activated. These will be accessible to you in the ladder and the library.

The screenshot shows the 'Settings' page with the 'Topics' section selected. The left sidebar lists various settings categories. The main content area is titled 'Topics' and contains a search field with a plus button (B), a 'Suggested Topics' list (A) with checkboxes, and a 'My Topics' list (C) with checkboxes and edit/delete icons. The suggested topics include '100th Day of School', '1st Grade', '2nd Grade', and '3rd Grade'. The My Topics list includes 'Academics', 'Ads', 'Athletics', 'Closing', and 'Clubs and Organizations'.

DESIGN STYLES

PAGE DESIGN PREFERENCES — This is where you can customize the settings for all pages in your book. What you set here will be the default for all pages, but users can customize the number of columns and the snapping/viewing options as needed when they are working on pages.

- A** We recommend you do not change the page margins unless you have a specific plan that necessitates changing them. The default margins are standard and work well.
- B** The grid size defaults to ½ pica for two reasons: 1) It is trendy, and 2) the Square One templates are built on a ½-pica grid.
- C** Spread Controls: If you work primarily in double-page spreads (rather than single pages), you may want to set your book to default to Spread Controls. This allows you to control both pages in the spread with a single selection when working in the Book module (the ladder).
- D** By default, access to Canva is enabled for you. You can disable Canva here in Page Design Preferences.
- E** By default, staff users cannot activate assets from the Catalog. You can enable that ability for them using this control.

The screenshot shows the 'Settings' page with the 'Design Styles' section selected. The left sidebar lists various settings categories. The main content area is titled 'Design Styles' and contains the 'Page Design Preferences' section. This section includes 'Page Margins & Columns' with input fields for Top (3p0), Outside (3p0), Inside (1p0), and Bottom (5p0) margins, and a dropdown for Columns per Page (1). It also includes 'Grids & Guides Settings' with checkboxes for Page Grid, Swiss Grid, and Snap to Grid, and radio buttons for Grid Size (1 Pica, ½ Pica, ¼ Pica). There are also checkboxes for 'Snap to Column Guides' and 'Fill new text frames with Lorem ipsum text'. At the bottom, there are checkboxes for 'Spread Controls in Book' (Default to spread controls, Default to single-page controls) and 'Enable Canva integration' (Standard Canva integration, Limited Canva integration). A checkbox for 'Staff users can activate Catalog assets' is also present. The page has 'Edit' and 'Save' buttons at the bottom right.

FONTS — This is where you can activate fonts to be accessible when designing pages.

Settings

Design Styles

Fonts

Search or filter for the fonts you want to load. Check the box next to the fonts you want to load.

Search Filter

Activated	Font Name
<input checked="" type="checkbox"/>	AHJ Raleway Thin
<input type="checkbox"/>	AHJ Raleway Thin Italic
<input checked="" type="checkbox"/>	AHJ Rampart One
<input checked="" type="checkbox"/>	AHJ Righteous
<input type="checkbox"/>	AHJ Rigid
<input checked="" type="checkbox"/>	AHJ Roboto Condensed Bold
<input type="checkbox"/>	AHJ Roboto Condensed Bold Italic

Preview: ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdeghijklmno
pqrstuvwxyz
1234567890

A You can type in the search field the name of a font you want, and eDesign will dynamically filter the list.

B To see what a font looks like, click on the font's name, and a preview will appear to the right. To activate a font, simply check the box next to it.

Settings

Design Styles

Fonts

Showing: 47 of 879 Script X Filter

Font Name

Preview: ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdeghijklmno
pqrstuvwxyz
1234567890
!@#%*^&()&#*%&()

C You can view fonts according to their style. Select from the filter the collection you wish to see.

Settings

Design Styles

Fonts

Showing: 12 of 879 Activated and Unused X Filter

Font Name

Preview: ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdeghijklmno
pqrstuvwxyz
!@#%*^&()&#*%&()

D The filter menu also lets you easily see which activated fonts you are using and which you aren't. Filter by Activated -Unused to engage a one-click method to clean up your fonts. Click "Deactivate Unused" and any fonts cluttering your settings will be cleared out for you.

Settings

Design Styles

Fonts

AHJ Molly Bee Regular is in use and cannot be removed. To remove this font from the book, you must first remove it from the following: Page: 18

Font Name

Preview: ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdeghijklmno
pqrstuvwxyz
1234567890

E To remove a font, uncheck the box. If the font is on a page, you'll be prompted to first remove the font from the page and then come back to Settings to deselect it.

Pro Tip: The more fonts you enable, the more time loading pages can take. Enable only those fonts that you truly wish to use.

CHARACTER STYLES — This is a time-saving tool that promotes consistency. You can create character styles to help you quickly format the font, color, size, leading, capitalization styling and tracking of text on pages. You are welcome to modify the default settings in eDesign or delete them and create entirely new ones. To apply a character style to text on a page, simply highlight text in a frame or select text frames, and then choose a style from the "Select Style" menu.

Settings

Design Styles

Character Styles

To maintain consistency and to save time when formatting type, create a Character Style for any text style which you will use repeatedly in your book.

Edit Add Copy

Name	Font	Color	Size	Spacing
Body Copy	AHJ Avalon Bold	Color	13	1
Caption				
Caption Starter				
Default System Style				

Preview: THE QUICK FOX JUMPS OVER THE LAZY BROWN DOG.
THE QUICK FOX JUMPS OVER THE LAZY BROWN DOG.

COLORS — This is where you can activate colors and create custom colors. If you click on “Activated,” the colors will filter the list to put your activated colors up top. When you click on a color, eDesign will show you a sample of the color on the right with black and white writing on top to help you see how both will look on that color. You may edit the colors and create new ones, and you can give any color a custom name. Watch for the “blurple” warning as you are mixing blues and purples: If your CMYK blend could print more purple than it looks, we warn you in order that you can consider this and make any desired adjustments.

The screenshot shows the eDesign Settings interface. The left sidebar contains navigation options: Staff Setup, School & Order Information, Topics, Design Styles (selected), Page Design Preferences, Fonts, Character Styles, Colors, Deadlines, Custom Dictionary, Coverage Report Settings, Export Settings, and Index Preferences. The main content area is titled 'Design Styles' and has a sub-tab 'Colors'. A note states: 'Computer screens don't show colors exactly as they will appear in print. A PDF proof gives a more accurate color representation. Even better, consult an HJ Colors poster. Printed samples are your best reference.' Below this is a warning: 'AVOID BLURPLE: Blues can LOOK blue on your screen but print purple. To avoid this, you need to have at least 30% more Cyan than Magenta in your blend.' There are 'Edit' and '+ Add' buttons. A table lists color swatches with checkboxes for activation and their CMYK values. One swatch is selected, showing a preview with the text: 'Every student deserves to be remembered. At your hands history is made.'

Activated	Swatch Name
<input type="checkbox"/>	C=0 M=0 Y=0 K=0
<input checked="" type="checkbox"/>	C=0 M=0 Y=0 K=100
<input checked="" type="checkbox"/>	C=0 M=0 Y=100 K=30
<input checked="" type="checkbox"/>	C=36 M=100 Y=0 K=30
<input checked="" type="checkbox"/>	C=19 M=100 Y=0 K=30
<input checked="" type="checkbox"/>	C=0 M=100 Y=0 K=0
<input checked="" type="checkbox"/>	C=0 M=80 Y=0 K=30
<input type="checkbox"/>	C=0 M=0 Y=0 K=30

DEADLINES

This is where you can create deadlines for your staff members to see on pages in eDesign.

- You can assign these deadlines to pages in the ladder to promote clear communication among staff members.
- You can filter your ladder by deadline to make it easy for you to monitor progress on pages assigned to a deadline.
- Your plant deadlines will appear on the left and the deadlines you create for your staff members will be on the right.

The screenshot shows the eDesign Settings interface, specifically the 'Deadlines' section. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Deadlines' and contains two tables. The first table, 'Plant Deadlines (all dates are Mondays)', shows a list of dates and total pages. The second table, 'Staff Deadlines', shows a list of dates and the number of pages assigned. There is an '+ Add' button for the Staff Deadlines table. A note at the bottom states: 'Add staff deadline dates to manage page production and to spread out the work. These deadlines don't need to coincide with your Herff Jones plant deadlines, but be sure your staff deadlines allow you to meet your plant deadlines.'

Ship Date	Total Pages
	400
February 20, 2023	64
March 13, 2023	68
April 03, 2023	68
April 24, 2023	68
May 15, 2023	68
May 29, 2023	64

Date	Number of Pages Assigned
September 30, 2022	0
October 28, 2022	0
November 30, 2022	0
December 30, 2022	0

PRO TIP FOR CREATING eDESIGN DEADLINES — It is extremely important that you create strategic eDesign deadlines in eDesign that give you ample time to review and revise pages before they are due.

- That is why you should NOT make the eDesign deadlines the same as the Plant Deadlines.
- Working ahead of schedule will give you peace of mind because you'll know you have plenty of time to edit pages prior to submission.
- Plus, it will give you time to solve problems when things don't go according to plan.
- Keep in mind that eDesign users with editor roles DO see the plant deadlines here in Settings, so if you do not want your general staff members to know the plant deadlines differ from the staff deadlines, ask your editors to keep that information to themselves as a part of their leadership duties.

CUSTOM DICTIONARY

eDesign is equipped with Spell Check that utilizes a robust dictionary and Name Check that helps you spell names correctly.

- When you are working on a page, eDesign will underline in red what it does not find in its dictionary.
- It will also underline in blue two or more words capitalized that are not on your Name List of names.
- You have the power to add to that dictionary so that words that are common to you are not underlined.
- Adding words to your custom dictionary will increase Spell Check's and Name Check's potency.

The screenshot shows the 'Custom Dictionary' settings page. The top navigation bar includes 'DESIGN', 'HOME', 'BOOK', 'REPORTS', 'LIBRARY', 'MASTER LIST', 'SEND AND SELL', 'CATALOG', 'SETTINGS', and 'HELP'. A sidebar on the left lists various settings categories, with 'Custom Dictionary' selected. The main content area is titled 'Custom Dictionary' and contains a 'Dictionary' section. Below this, there is a text box explaining that users can add custom names and words to be used by Name Check and Spell Check. A 'Custom Word/Name' input field is set to 'New words' with a plus icon to add items. Below this is a table with a header 'L' and three rows: 'Lakey', 'Lambert Longhorns', and 'Memorial Hall'. Each row has a red trash icon to its right. On the far right, there is a vertical alphabetical index from A to Z.

COVERAGE SETTINGS

The Coverage Report has default settings to monitor four levels of coverage: Low, Moderate, Good and Excessive. You have the power to customize that.

- You can change the number of instances for each level.
- You can turn off the Moderate and/or Excessive levels.
- The changes you implement here will be useful in the Coverage Report as well as Send and Sell.

The screenshot shows the 'Coverage Settings' page. The top navigation bar is similar to the previous page but includes 'NAME LIST' and 'HELP' with a notification icon. The sidebar on the left lists settings categories, with 'Coverage Report Settings' selected. The main content area is titled 'Coverage Settings' and features a 'Coverage Level Preferences' section. A horizontal slider is shown at the top. Below it, there are four rows representing coverage levels: 'Low Coverage' (red square) set to '0 to 2', 'Moderate Coverage' (orange square) set to '[not in use]', 'Good Coverage' (green square) set to '3 or more', and 'Excessive Coverage' (grey square) set to '[not in use]'. Each row has a color-coded square and a corresponding value or status.

EXPORT SETTINGS

In the Export Settings area, you can move your settings for things like Staff, Topics, Fonts and Colors to another eDesign book.

Settings

- Staff Setup
- School & Order Information
- Topics
- Design Styles
- Deadlines
- Custom Dictionary
- Coverage Report Settings
- Export Settings**
- Index Preferences

Export Settings

Save It Forward

Select a Book or Supplement → Export Options → Export Confirmation → Export Summary

Destination Order: Test Account High School 2023 YEARBOOK-MAINBOOK (-78009-000-2023) - Size 8
Select the book settings and assets you want to save to the chosen supplement or next year's book.

Staff Topics Fonts Colors
 Page Assignments Page Topics Character Styles

Previous Next

INDEX PREFERENCES

In Index Preferences, the adviser can select the types of information that Index Builder should identify as possible index entries. You should make these decisions early in the process. After changing settings, you'll click to Save and Rebuild your Index Data to bring everything in line with your preferences. This rebuild happens during an overnight process after you click to rebuild.

- Coverage Report Enabled: By default eDesign is reading text frames and image tags to track how often each person in your Name List is in the book. If you don't want or need this, disable it here.
- Include Name Tags - Index builder picks up all Name Tags applied to images used on pages.
- Include Portrait Metadata - Index builder picks up the names associated with portraits directly from the Portrait Library metadata.
- Include Text Frame Names - Index Builder picks up on sequences of two or more capitalized words in text frames on pages. Using this option can make your index more complete, but it will require more clean up at the end of the year. If you disable this option, then be sure to use Name Tags consistently on images used on pages.
- Included Page Topics & Sections - Index Builder picks up the Topics and Sections you apply to pages in the Book module (the ladder).

Settings

- Staff Setup
- School & Order Information
- Topics
- Design Styles
- Deadlines
- Custom Dictionary
- Coverage Report Settings
- Export Settings
- Index Preferences**

Index Preferences

Coverage Report Enabled: Yes No

Index Builder Enabled: Yes No

Include Name Tags and Keywords (Ads only): Yes No

Include Portrait Metadata: Yes No

Include Text Frame Names: Yes No

Include Page Topics & Sections: Yes No

Save & Request Rebuild

Index Rebuild Information:

An index rebuild is for troubleshooting and does not need to be performed otherwise. This option will remove all existing index metadata used by Index Builder and Coverage Report. It will then create new index metadata based on your book's current contents.

This will not impact any edits already made in the Index Builder module.

If you request a rebuild, this will schedule your index data to be rebuilt during an overnight process between 2:30 a.m and 4:30 a.m. Eastern time. Users should not be working in the book during this time.

Request Full Rebuild