



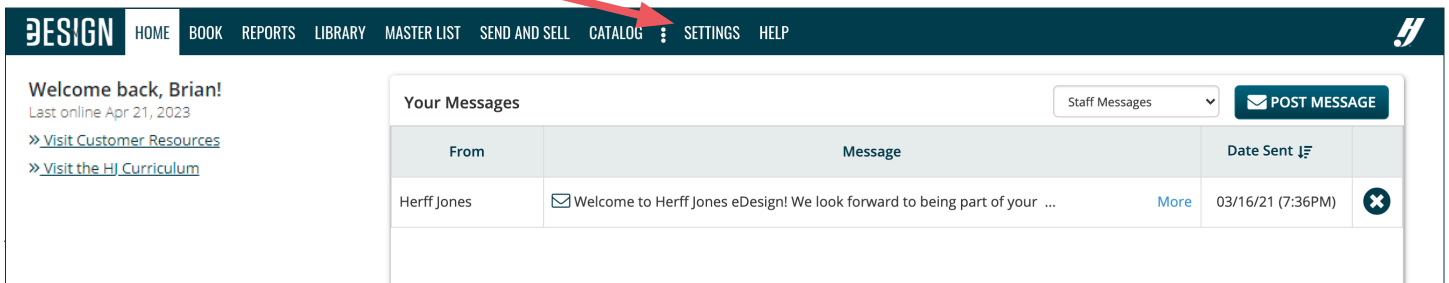
# SETTINGS

## 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 – Edit info about your school and order; 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.

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:   
All lowercase and a minimum of 5 characters

\*Password:   
Min 5 characters, no spaces

\*Role:

**C**  Can edit all pages

Access projects

- 2022 YEARBOOK-MAINBOOK
- 2021 YEARBOOK-MAINBOOK
- 2020 YEARBOOK-MAINBOOK
- 2019 YEARBOOK-MAINBOOK
- 2018 YEARBOOK-MAINBOOK
- 2017 YEARBOOK-MAINBOOK
- 2015 YEARBOOK-MAINBOOK

### Edit Staff

\*First Name:

\*Last Name:

Email:

\*Username:   
All lowercase and a minimum of 5 characters

**D** \*Password:   
Min 5 characters, no spaces

\*Role:

Can edit all pages

Access projects

- 2022 YEARBOOK-MAINBOOK
- 2021 YEARBOOK-MAINBOOK
- 2020 YEARBOOK-MAINBOOK
- 2019 YEARBOOK-MAINBOOK
- 2018 YEARBOOK-MAINBOOK
- 2017 YEARBOOK-MAINBOOK
- 2015 YEARBOOK-MAINBOOK

### **A** EMAIL ADDRESS

Adding an email address is only necessary when creating a new adviser. The email address field is irrelevant when adding a student, so you can simply skip it when adding an editor or staff member.

### **B** USER NAMES & PASSWORDS

When you create the usernames and passwords for your staff members, they must meet these parameters:

- all lowercase
- no spaces
- minimum of 5 characters

Pro Tip – We recommend you include your job# in the username and password to make them unique in the eDesign universe.

### **C** "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.

### **D** PASSWORDS WHEN EDITING

To protect passwords, when you edit a user, you will not see the password. Unless you are specifically wanting to change the password, simply leave the password field empty, and when you save the changes, the password will not be changed.

# SCHOOL & ORDER INFORMATION\*

**SCHOOL ADDRESS** - You can edit the contact person as well as the address that appears at the bottom of Send and Sell messages.

The screenshot shows the 'Settings' menu on the left with 'School & Order Information' selected. The 'School Address' sub-tab is active. The main content area contains the following information:

**School Address**  
The contact information will be used for communicating of any pricing updates. The address listed will appear in the footer for any Send and Sell messages.

School Name : Herff Jones High School      Address : 1234 Main Street

Contact Name: Harry Herff      City: Anywhere

E-mail: harry@herffjones.com      State: Indiana      Zip: 40000

Buttons: Edit, Save

**ORDER INFORMATION** - This is not editable data. It is information that is populated by the plant's database for your quick reference.

The screenshot shows the 'Settings' menu on the left with 'School & Order Information' selected. The 'Order Information' sub-tab is active. The main content area contains the following information:

**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: -75002-000-2023      Plant Deadlines:      Total Pages: 400

Book Size: 7

Copy Count: 275

Page Count: 400

Ship Date:

YOC Direct Link: <https://www.yearbookordercenter.com/index.cfm/job/-75002>

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

**NAME LIST** - First import your name list into Sales Setup via myHJyearbook. There's a link in this window that takes you directly there. Wait 15 minutes for the server to process the list, and then come back to Settings and click "Import Name List."

The screenshot shows the 'Settings' menu on the left with 'School & Order Information' selected. The 'Name List Import' sub-tab is active. The main content area contains the following 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.

Button: 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 eDesign Settings interface. The left sidebar contains a menu with options: Staff Setup, School & Order Information, Topics, Design Styles, Deadlines, Custom Dictionary, Coverage Report Settings, Export Settings, and Index Preferences. The main content area is titled "Topics" and includes a search field with a plus button. Below the search field are two columns of topic lists. The "Suggested Topics" column lists items like "100th Day of School", "1st Grade", "2nd Grade", "3rd Grade", "4th Grade", "5000 Role Models", "5th Grade", "6th Grade", "7th Grade", and "8th Grade". The "My Topics" column lists items like "Academics", "Ads", "Athletics", "Closing", "Clubs and Organizations", "Faculty", "Freshmen", "Index", "Juniors", "Opening", and "Portraits". Each item in both columns has a checkbox and an edit icon.

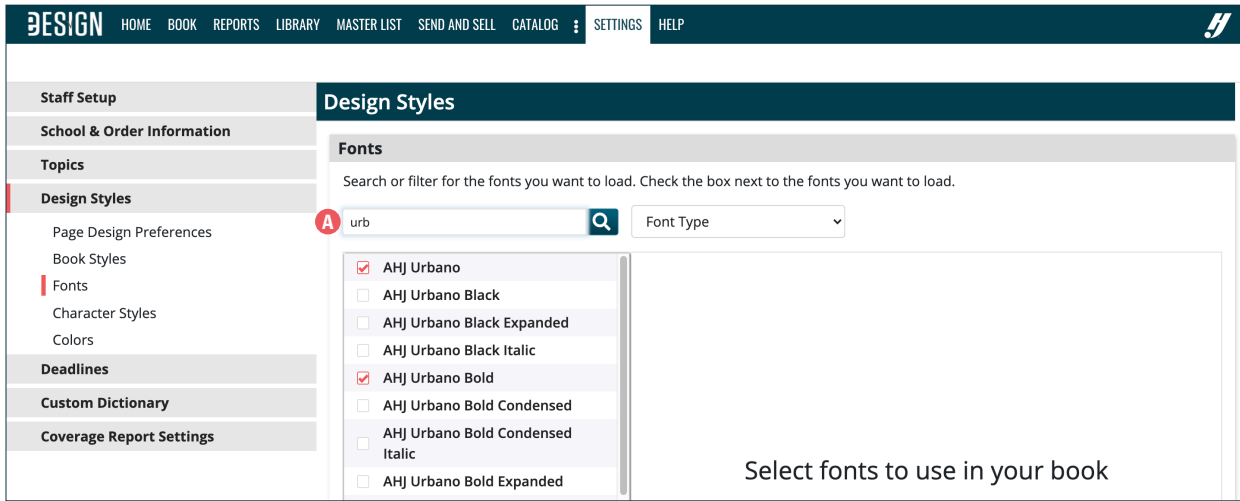
## DESIGN STYLES

**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 1/2 pica for two reasons: 1) It is trendy, and 2) the Square One templates are built on a 1/2-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).

The screenshot shows the eDesign Settings interface for the "Design Styles" section. The left sidebar menu is updated to include "Page Design Preferences", "Book Styles", "Fonts", "Character Styles", and "Colors". The main content area is titled "Design Styles" and contains "Page Design Preferences". Under "Page Margins & Columns", there are input fields for "Top:" (3p0), "Outside:" (4p0), "Inside:" (1p0), "Bottom:" (4p0), "Columns per Page:" (1), and "Column Spacing:" (1p0). There are also checkboxes for "Grids & Guides Settings" (Page Grid, Swiss Grid), "Grid Size:" (1 Pica, 1/2 Pica, 1/4 Pica), "Snap to Grid", "Snap to Column Guides", "Fill new text frames with Lorem ipsum text", and "Spread Controls in Book:" (Default to spread controls, Default to single-page controls). There are also checkboxes for "Enable Canva integration", "Standard Canva integration", and "Limited Canva integration". At the bottom right, there are "Edit" and "Save" buttons.

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

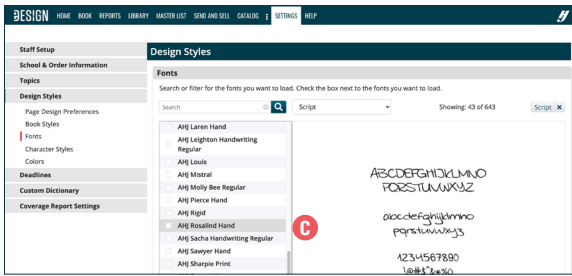
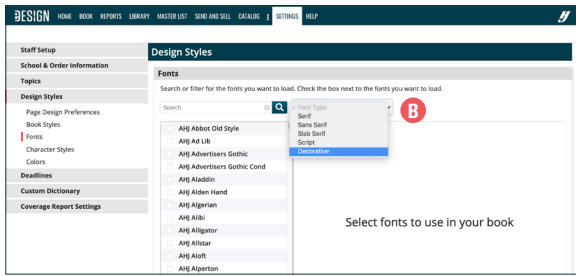


**A** You can type in the search field the name of a font you want, and eDesign will dynamically filter the list.

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

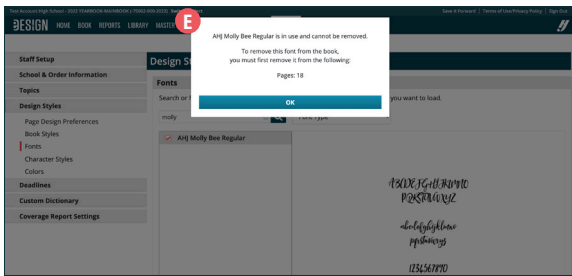
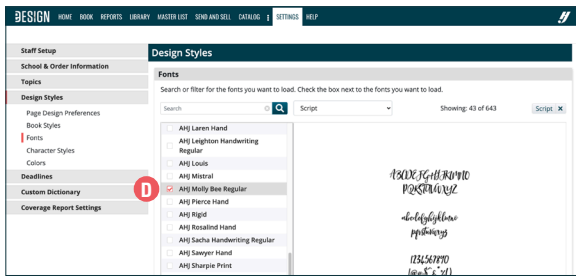
Select fonts to use in your book

**C** To see what a font looks like, click on the font's name, and a preview will appear to the right.

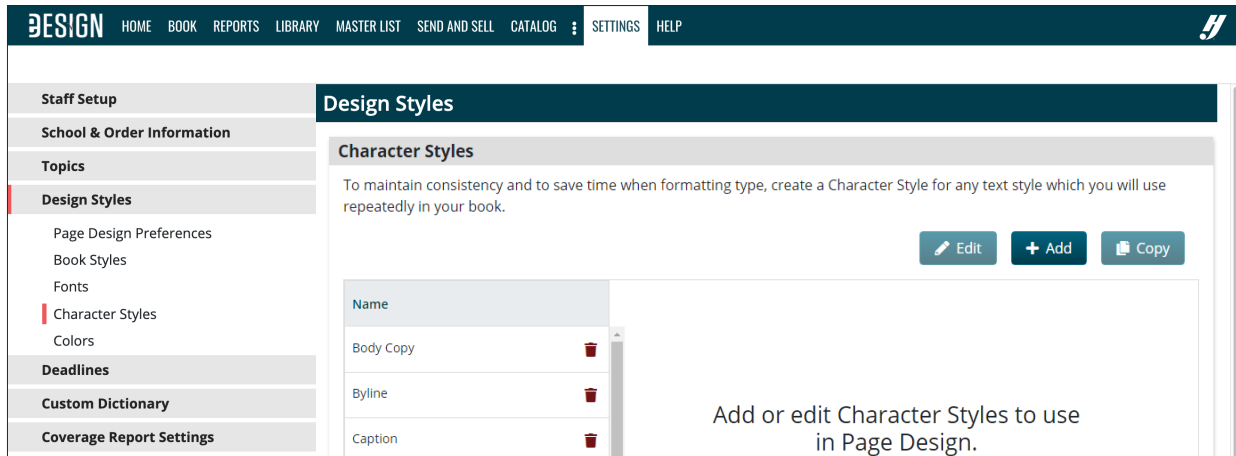


**D** To activate a font, simply check the box next to it.

**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.



**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 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.



**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.

The screenshot shows the eDesign Settings interface. The left sidebar lists various settings categories, with 'Design Styles' selected. The main content area is titled 'Design Styles' and contains a 'Colors' section. 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 table of color swatches with checkboxes for activation. One swatch, 'C=0 M=63 Y=72 K=0', is selected and highlighted in pink. To the right of the table is a preview window showing the selected color with the text 'Every student deserves to be remembered. At your hands history is made.' in both black and white.

Activated	Swatch Name
<input type="checkbox"/>	C=0 M=0 Y=0 K=80
<input type="checkbox"/>	C=0 M=0 Y=0 K=90
<input checked="" type="checkbox"/>	C=0 M=0 Y=0 K=100
<input type="checkbox"/>	C=0 M=34 Y=24 K=0
<input type="checkbox"/>	C=12 M=44 Y=37 K=0
<input type="checkbox"/>	C=0 M=68 Y=73 K=0
<input checked="" type="checkbox"/>	C=0 M=63 Y=72 K=0
<input type="checkbox"/>	C=0 M=70 Y=100 K=0

## 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 with the 'Deadlines' section selected. It is divided into two main panels: 'Plant Deadlines' and 'Staff Deadlines'. The 'Plant Deadlines' panel shows a table of dates and total pages assigned, with a total of 400 pages. The 'Staff Deadlines' panel shows a table of dates and the number of pages assigned to each staff member, with a total of 0 pages assigned. A note at the bottom explains that staff deadlines are used to manage page production and should be set to allow meeting plant deadlines.

Date	Total Pages
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. On the left is a navigation menu with options: Staff Setup, School & Order Information, Topics, Design Styles, Deadlines, Custom Dictionary (highlighted), and Coverage Report Settings. The main content area has a dark header 'Custom Dictionary' and a sub-header 'Dictionary'. Below this is a text box explaining that users can add custom names and words to be used by Name Check and Spell Check. A search bar labeled 'Custom Word/Name:' contains the text 'New words' and a plus icon. Below the search bar is a table with a header 'L' and three rows: 'Lakey', 'Lambert Longhorns', and 'Memorial Hall'. Each row has a red trash icon on the right. To the right of the table 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 visible in the Coverage Report and on the portal at [www.myHJyearbook.com](http://www.myHJyearbook.com)

The screenshot shows the 'Coverage Settings' page. On the left is a navigation menu with options: Staff Setup, School & Order Information, Topics, Design Styles, Deadlines, Custom Dictionary, and Coverage Report Settings (highlighted). The main content area has a dark header 'Coverage Settings' and a sub-header 'Coverage Level Preferences'. Below this is a text box explaining that coverage is the number of times someone is mentioned in the yearbook and that users can adjust the values for low, moderate, good, and excess coverage. A horizontal slider is shown with a red segment on the left and a green segment on the right. Below the slider is a table with four rows: 'Low Coverage' (0 to 2), 'Moderate Coverage' ([not in use]), 'Good Coverage' (3 or more), and 'Excessive Coverage' ([not in use]).

## 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.

- 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 on pages (from the Portraits Library).
- 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