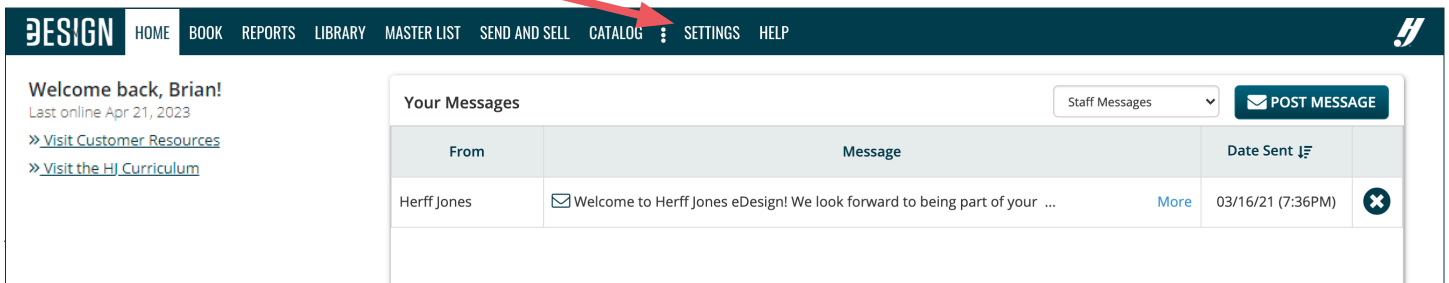# SETTINGS
YOUR GUIDE TO USING eDESIGN

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

Usernames & 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:

Ⓐ Email:

Ⓑ *Username:
create username
All lowercase and a minimum of 5 characters

*Password:
create password
Min 5 characters, no spaces

*Role: Staff

Ⓒ ☐ 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

Cancel   Add Staff

Edit Staff

*First Name: Jamie

*Last Name: Abeyta

Email:

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

Ⓓ *Password:
create password
Min 5 characters, no spaces

*Role: Staff

☐ 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

Cancel   Edit Staff

Ⓐ 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.

Ⓑ 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.

Ⓒ "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.

Ⓓ 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.

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

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."

*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.
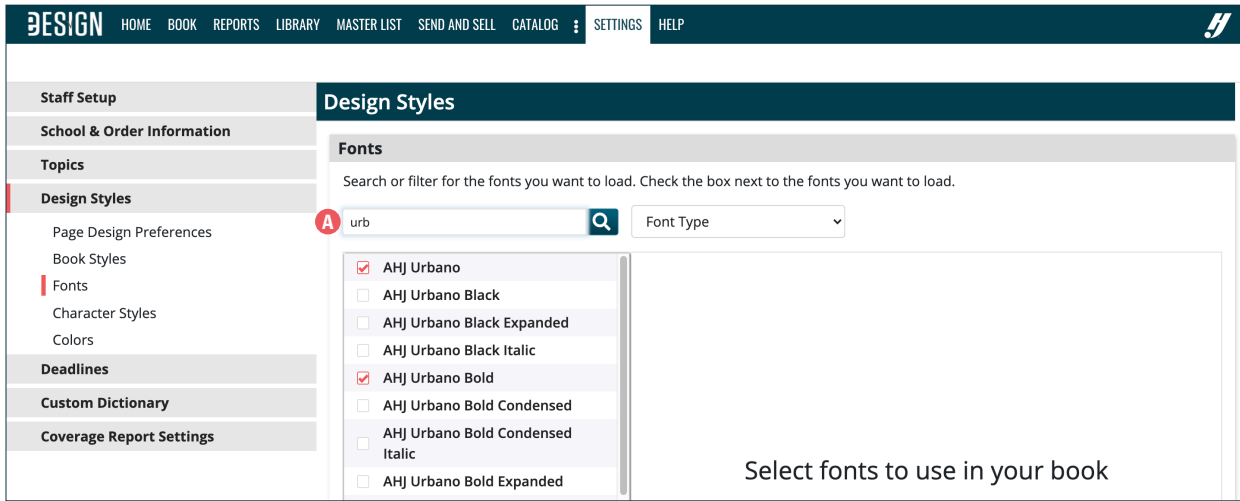

DESIGN STYLES

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).

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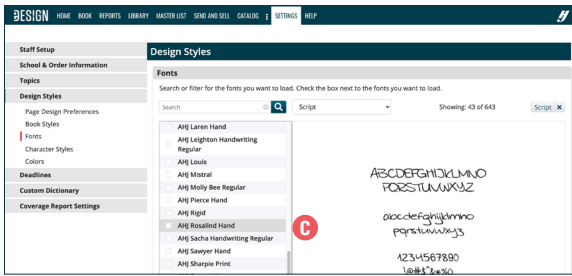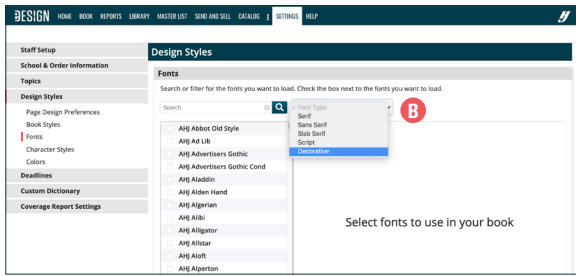

A You can type in the search field the name of a font you want, and eDesign will dynamically filter the list.

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

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.
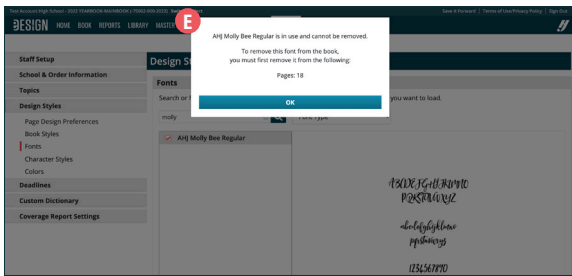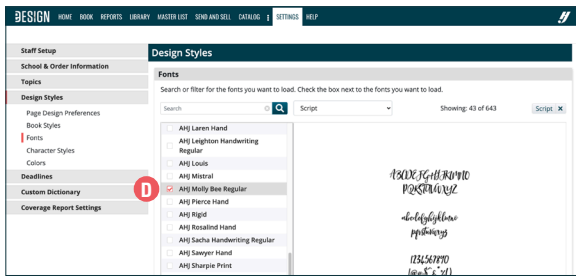
CHARACTER STYLES — This is a time-saving tool that promotes consistency. You can create character styles to help you quickly format the font, color, size, leading and tracking of text on pages. You are welcome to modify the default settings in eDesign or delete them and create entirely new ones.
To apply 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.

ƎDESIGN

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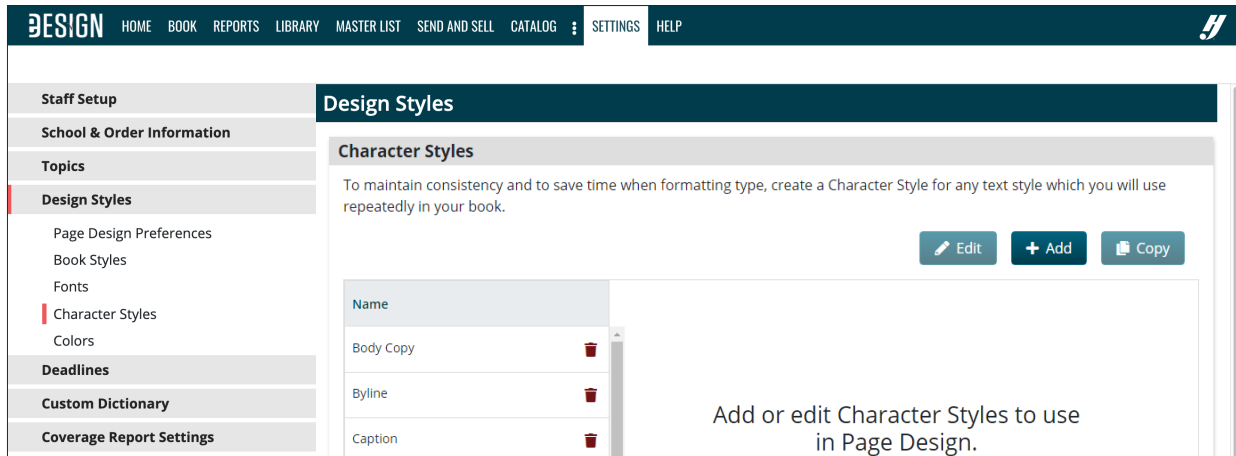
COLORS — This is where you can activate colors and create custom colors. If you click on "Activated," the colors will filter the list to put your activated colors up top. When you click on a color, eDesign will show you a sample of the color on the right with black and white writing on top to help you 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.

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.

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.

ƎESIGN

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.

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

ƎESIGN

EXPORT SETTINGS

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

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 consistenly 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).