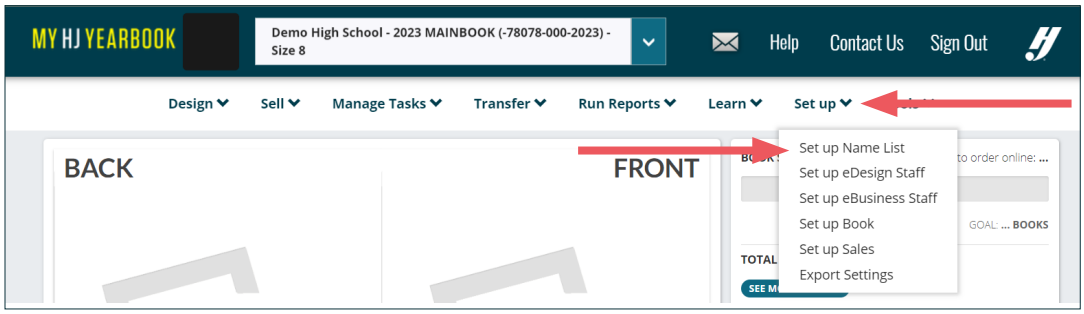
NAME LIST
YOUR GUIDE TO USING eDESIGN

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 tab-delimited text file (.txt). 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
   - **MIDDLE NAME** – (optional) differentiates students with identical first and last names
   - **GENDER** – (optional) helps identify students for Name Check and image tagging
   - **TEACHER** – (optional) a teacher designation (e.g., homeroom) can be helpful
   - **STUDENT ID #** – only required for using Plus One but very helpful in distinguishing students with the same name/grade
   - **PARENT EMAIL ADDRESS** – required for using Send and Sell to promote sales
   - **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 SALES SETUP**.
   1. Log in at myHJyearbook.com. Go to Setup > Set up Name List.



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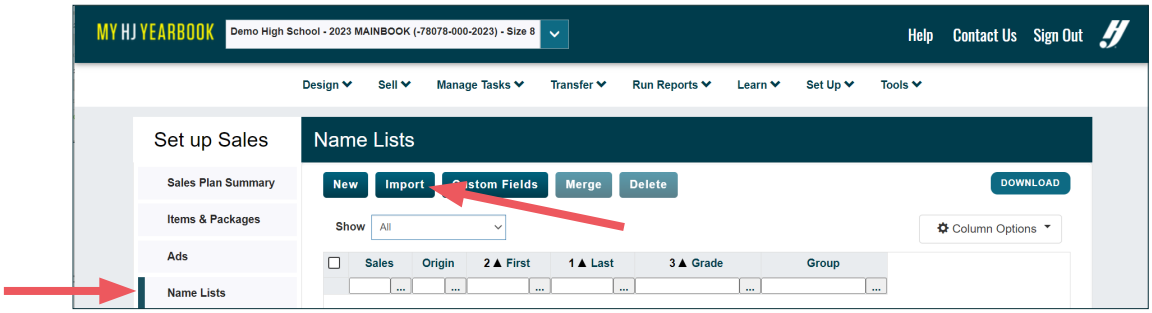
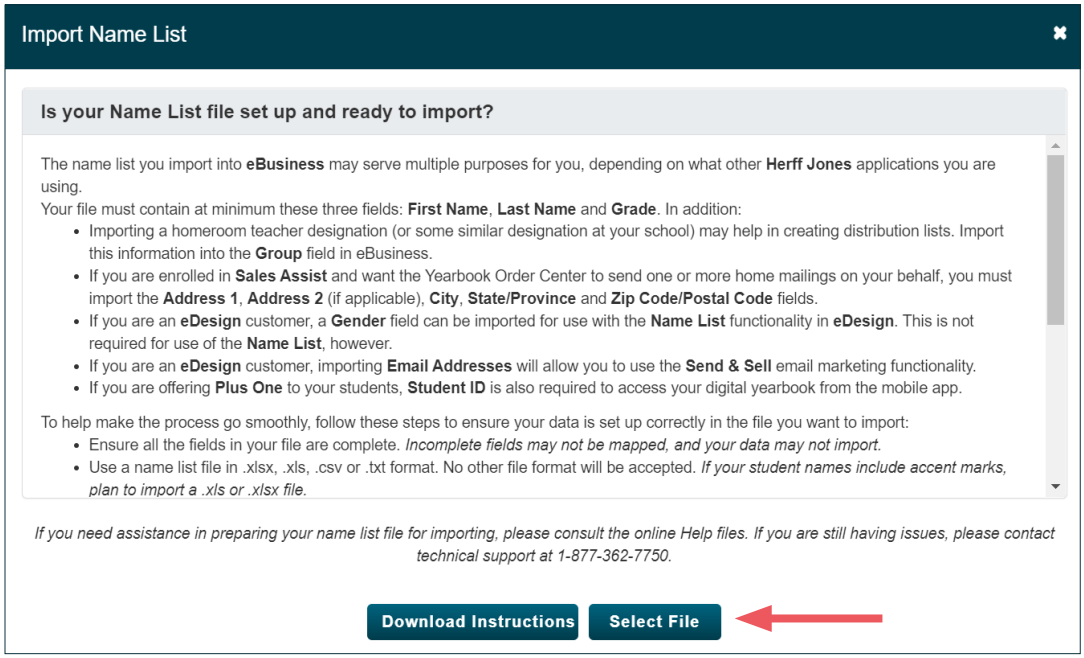
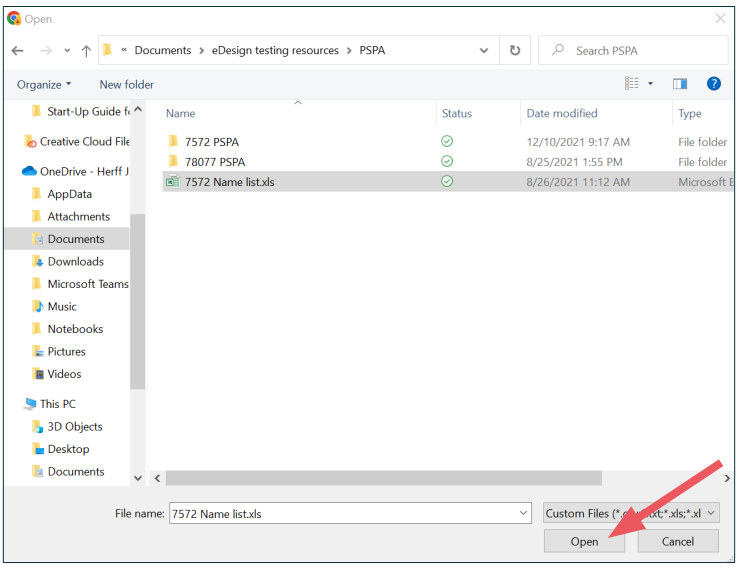
2. Choose Name Lists along the left and click "Import."



3. Click "Select File."



4. Navigate to your file. Then click "Open."



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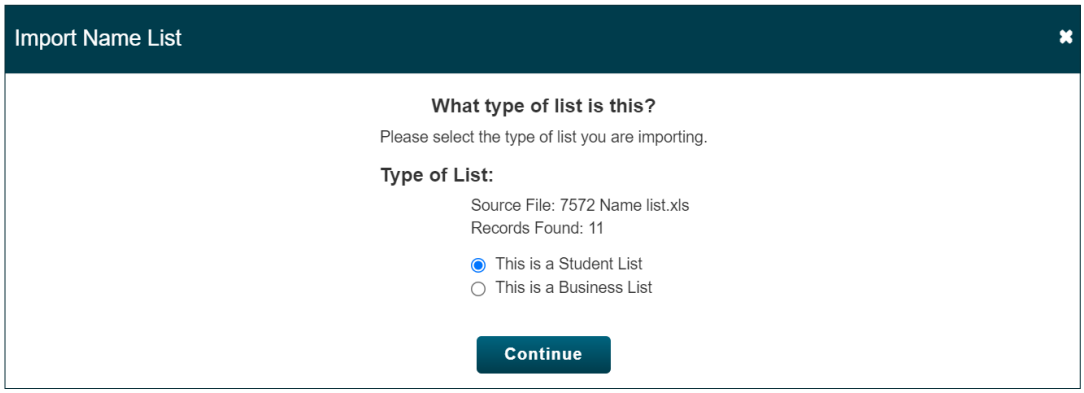
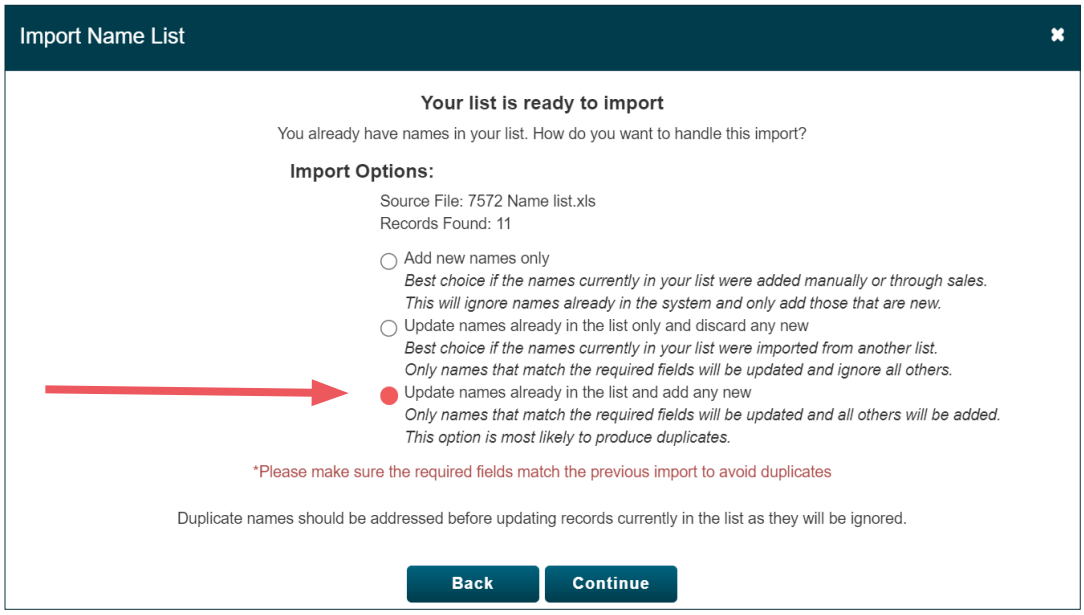
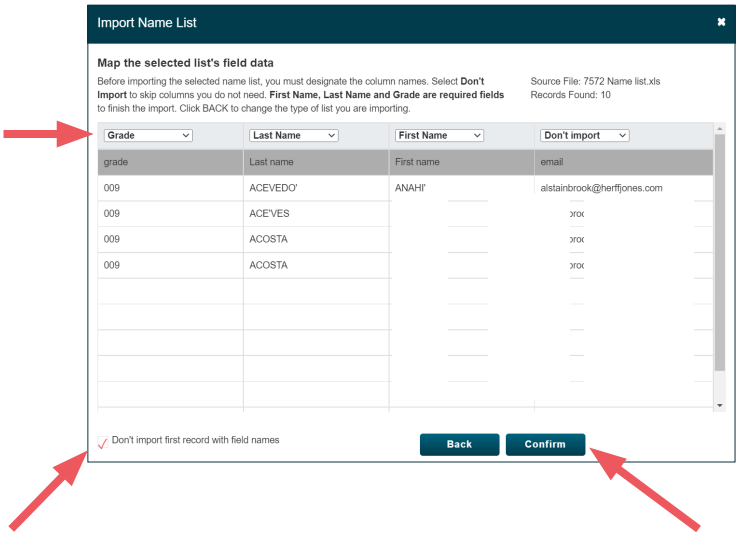
5. Click on "This is a Student List" and click "Continue."

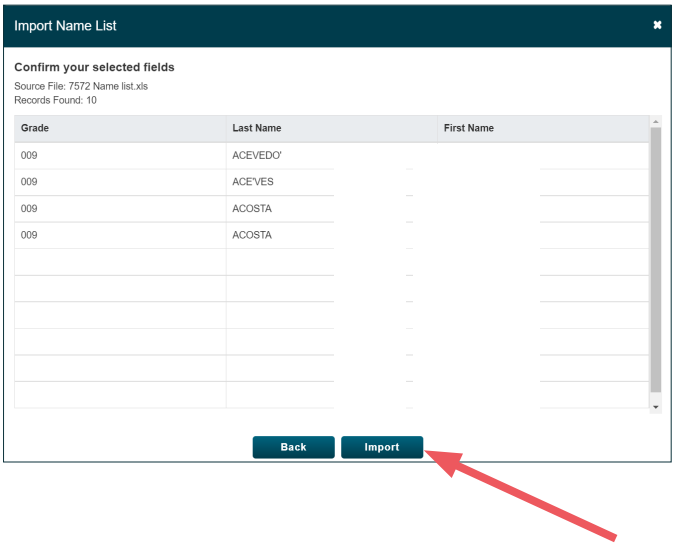


6. If prompted with the screen below, select the third option at the bottom: "Update names already in list and add any new."



7. Click the column headings and select the appropriate designation for each column. You must map fields for First Name, Last Name and Grade. If your file has headers, click the box at the bottom left so they won't import. When finished, click "Confirm." Then review your mapping choices and click "Import."





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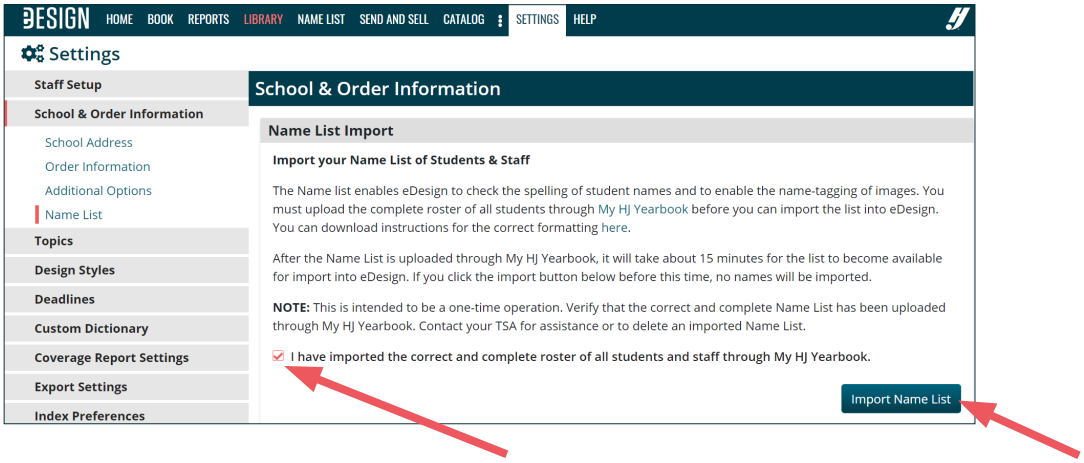
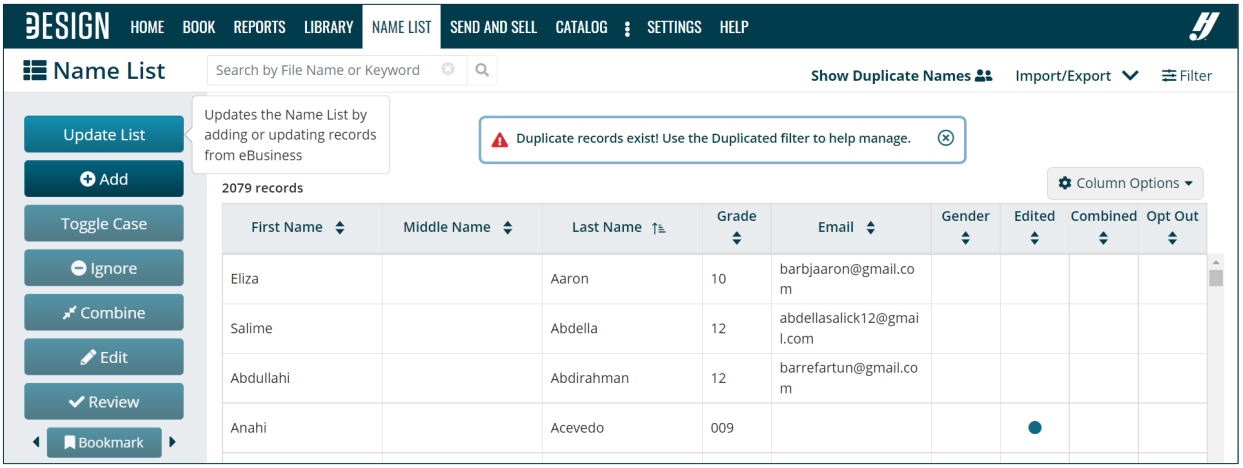
3. IMPORT THE LIST TO eDESIGN.
After uploading your name list to Sales Setup, wait 15 minutes before importing the list into eDesign.

1. Launch eDesign and go to Settings > School & Order Information > Name List. Check the box indicating that you have imported the list in eBusiness, and then click "Import Name List."



2. When the import is complete, close Settings and click the Name List tab in eDesign to review and edit your list of names.



NAME LIST TIPS AND BEST PRACTICES

- **IMPORT DATA INTO eBUSINESS 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.

- **KEEP LEGAL NAMES IN eBUSINESS.**
  Do not edit names in eBusiness. Keep names in eBusiness as they exist in your school's database. This provides the most accuracy for accounting and distributing yearbooks.

- **EDIT PREFERRED NAMES IN eDESIGN.**
  Change a student's name to his/her "preferred name" in eDesign, not eBusiness. In eDesign 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.

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- **IMPORT MIDDLE NAMES OR MIDDLE INITIALS.**
  Often there are students with the same first and last name. Having a student's middle name or initial in the name list makes it easier for you to tag photos with accuracy, which in turn makes your coverage reports, Send and Sell messages and index more streamlined and accurate. If you did not initially upload middle names with your name list, see the instructions below under the heading "Updating a Name List."

- **IF YOU NEED TO ADD NEW STUDENTS, UPLOAD THEM TO eBUSINESS AND THEN UPDATE IN eDESIGN.**
  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 eBusiness and then update the Name List in eDesign. See instructions below under "Updating a Name List."

- **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.

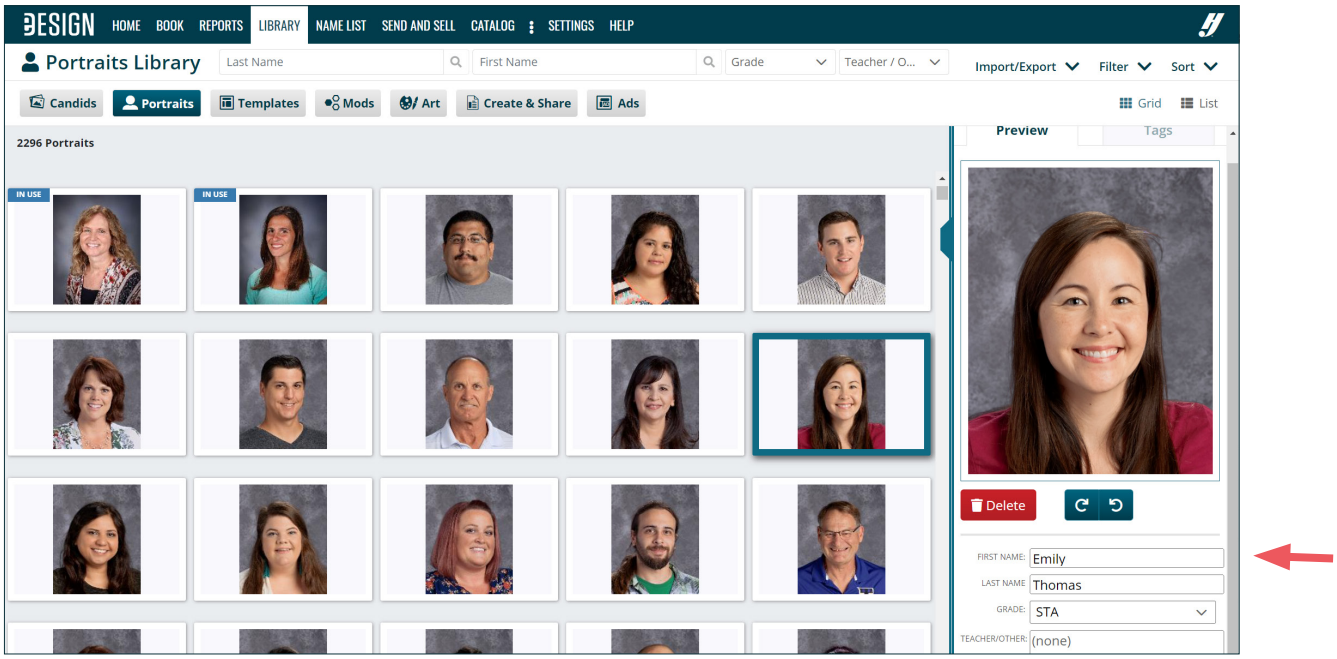
- **USE NAME CHECK ON PAGES.**
  One of the most powerful uses of eDesign's Name List is the Name Check function. Name Check highlights names on pages that don't match any name on the Name List and allows you to quickly and easily correct the spelling. See the topics on Name Check in eDesign Help for 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 THE STUDENTS' LEGAL NAMES.**
  When you import portraits, the names are those your school provided to your photographer. Therefore, when your photographer prepares the PSPI 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.



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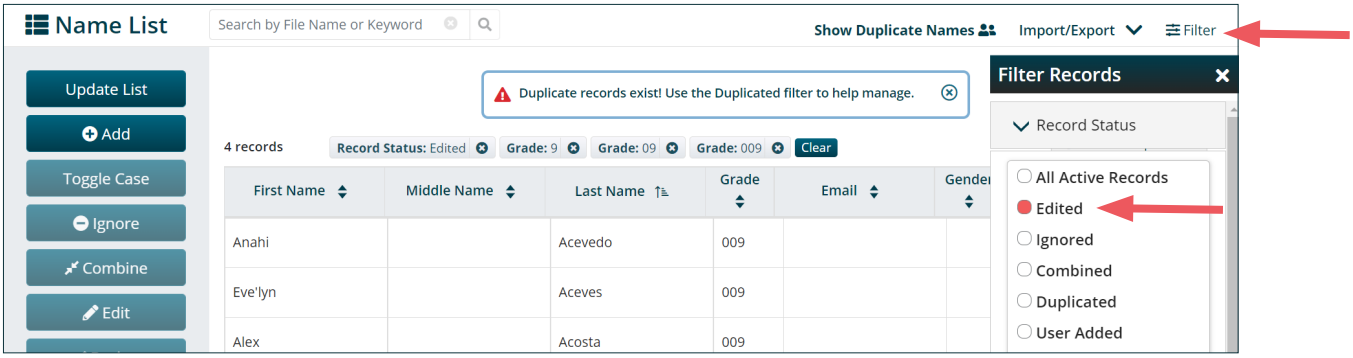
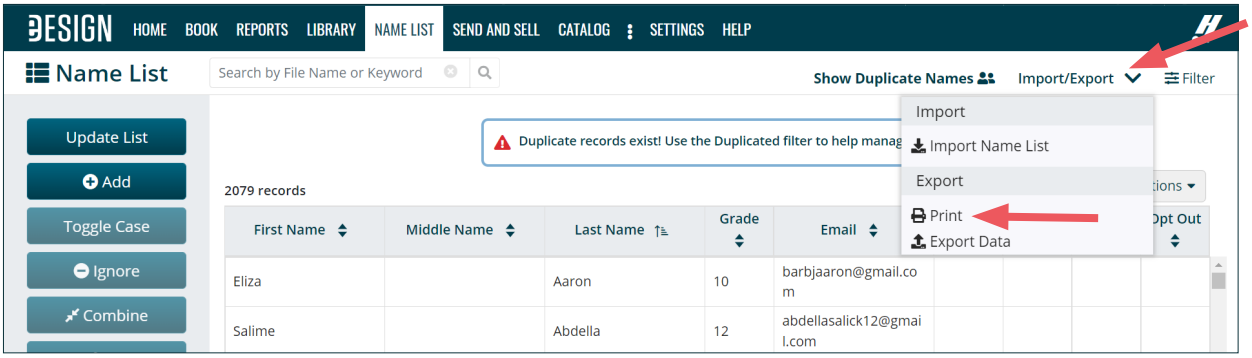
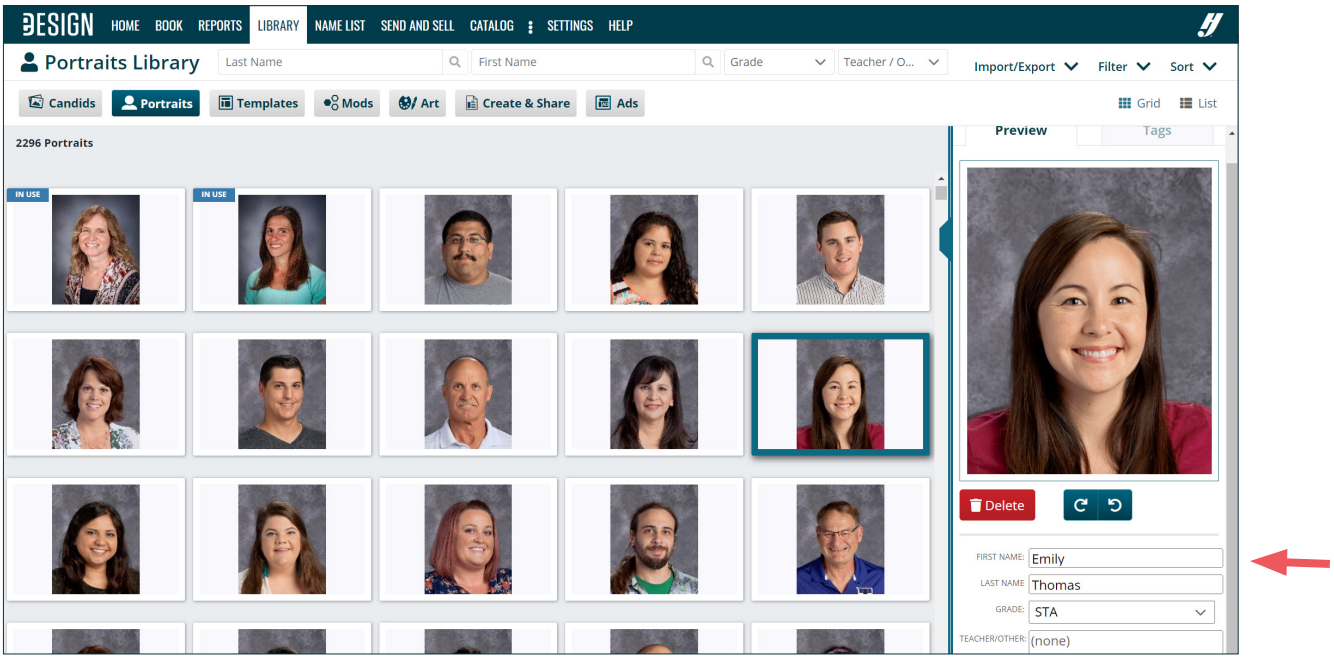
- **EDIT THE PORTRAIT NAMES TO REFLECT THE PREFERRED NAMES USING THE PROCEDURE BELOW.**
  If you've taken the time to edit your Name List to reflect student's preferred names, here's an easy way to make sure you also make those changes to the portraits.
  1. Click the Name List tab in eDesign.
  2. Click 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.



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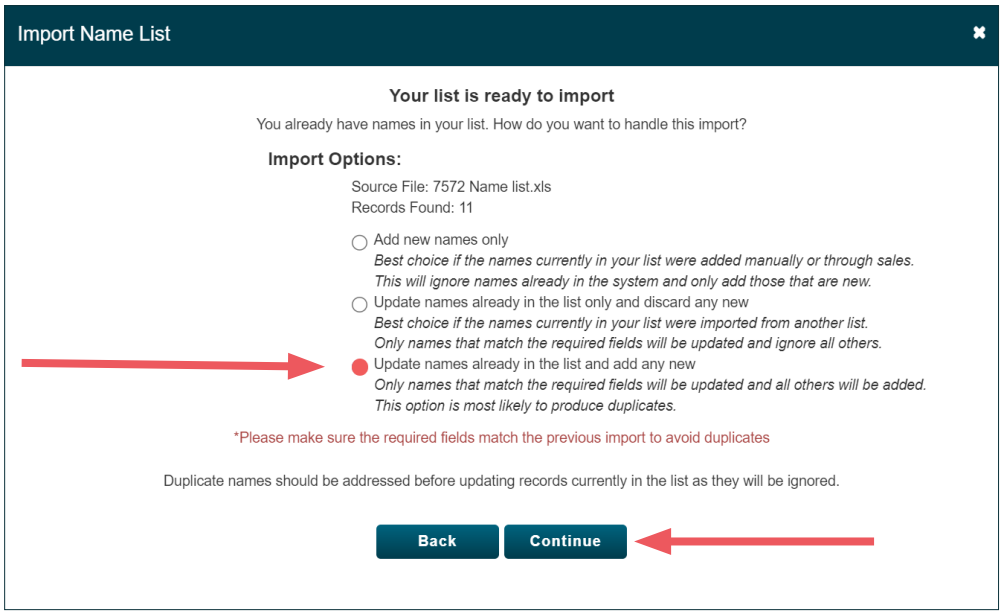
UPDATING A NAME LIST

After uploading a name list to Sales Setup, 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, Middle Name, Gender, etc.).

To update an existing name list, you'll repeat the steps listed earlier in this document. Here's a quick review of those steps for your quick reference:

1. Log in to myHJyearbook.com.
2. Go to Setup > Setup Sales and click Name Lists along the left.
3. Click the Import button, select your file and click "Open."
4. Choose Student List as the type, and then click "Continue."
5. Since a names list already exists in eBusiness, you will be presented with an Import Options window. Choose the one on the bottom: "Update names already in the list and add any new." Then click "Continue."



6. When the mapping screen displays, click the column headings and select the designation for each column of data. Map the fields for First Name, Last Name and Grade as well as any additional fields you want to add or update.
7. When you have mapped the fields, click "Confirm."
8. Review your choices, and click "Import." Then your name list will be updated with the new data.
9. Wait 15 minutes so the server can save the data and prepare it to be accessible in eDesign.
10. Then click the Name List tab in eDesign and click "Update from eBiz" to update the data.

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