



PORTRAIT FLOW

GUIDE TO USING eDESIGN

This guide walks you through setting up your portraits using eDesign's automated Portrait Flow capabilities. You can also find accompanying video tutorials within eDesign's Help Menu.

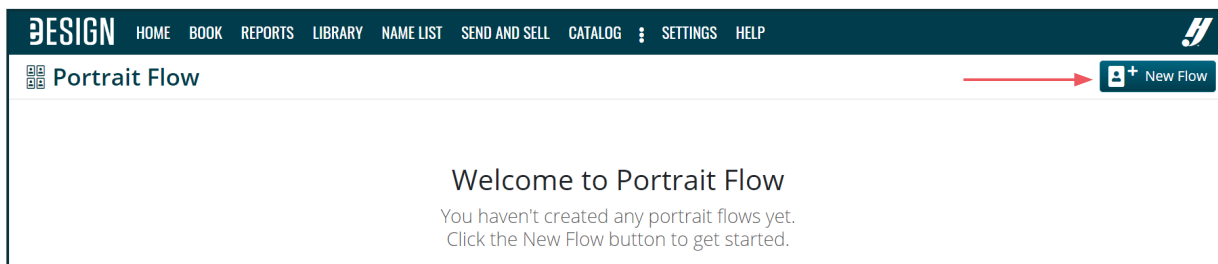
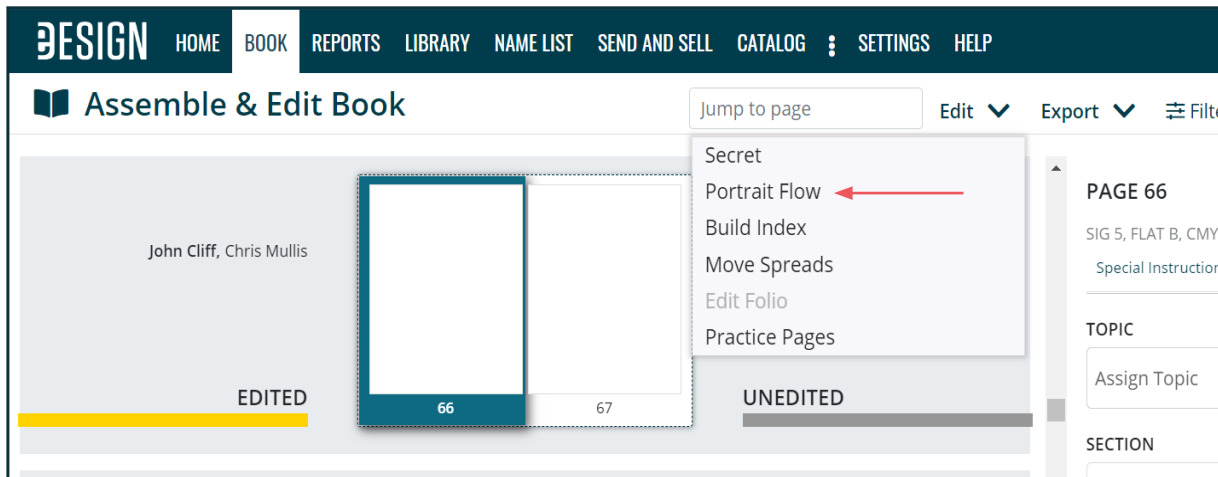
PORTRAIT FLOW

FLOWING PORTRAITS

The Portrait Flow wizard takes the names and images from the Portrait Library and puts them onto the pages based on your specified settings. As you start the year, you can flow gray boxes so you can prepare your portrait pages. Once you receive the "PSPI file" of portraits from your school's photographer, you'll be ready to flow the actual portraits. **For more information about the PSPI file and what to do with it, click the "Help" button in eDesign and search for the word "PSPI": You'll find video tutorials that help you understand how to upload that file and how to adjust names and grades as necessary.**

HOW TO GO ABOUT IT

1. **Click the Book tab** in the navigation panel.
2. In the Ladder, **select the first page** of where your portraits will be flowed.
3. **Click the Edit Menu** and choose **Portrait Flow**.
4. **Click the New Flow** button in the upper right corner.



5. **Enter a Flow Name.**
6. **Verify the starting page number.** If this is incorrect, use the drop down menu to select the correct starting page.
7. **Select the Portraits type.** Placeholders allow you to configure your portrait pages before you receive the portraits from your photographer. Portraits will flow your actual portrait images onto the pages.
8. **Select how Portraits will be grouped.** Portraits can be grouped alphabetically by Grade or Teacher/Other.
 - **Grades:** Select one or more grades to flow students as one group.
 - **Teacher/Other:** Select the Teacher(s) or Other designations that will be flowed together.
9. **Check the Include Teacher with the Class box** if the teacher will be flowed with the students. Up to four teachers and teacher assistants can be included in each portrait group. Teachers will come first in alpha order. Assistant teachers will flow in alpha order after the teachers.

Flow Group:

Teacher/Other: Mrs. Crowe

- Howard (22)
- Mrs. Cappie (6)
- Mrs. Crowe (42)
- Mrs. Konow (21)

Include teacher with the class

Choose From List

Select up to 4 total teachers or teacher assistants.

Include a teacher assistant with the class

Choose From List

10. **Choose the teacher(s) from the list.**
11. **Check Include Teacher Assistants** if the assistant will also be included in the flow.
12. **Choose the Assistant(s) from the list.**
13. If there are any missing portraits, choose how **Names Without Portraits** are handled.
 - **Flow "Photo Not Available"** will flow a silhouette of a head and shoulders in alphabetical order with the other portraits.
 - **Flow a "Not Pictured" List of Names** will add a list of student names who are missing portraits at the end of your group.
 - **Do Not Include Missing Portraits** will not show any indication of missing portraits.
14. **Click the Next Button.**

FLOWING PLACEHOLDERS

Placeholders will flow a specified number of gray boxes onto your pages to help reserve that space for your portraits. You can easily replace them when the actual portrait files arrive later in the year.

1. **Select the Placeholders option.**
2. **Enter the amount of Placeholders** you would like to flow onto the pages.

DESIGN HOME BOOK REPORTS LIBRARY NAME LIST SEND AND SELL CATALOG

Portrait Flow

Portrait Flow Settings

Flow Name:

Start Page:

Type: Placeholders Portraits

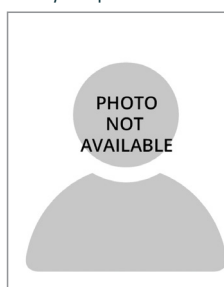
Group Portraits By: Grades Teacher/Other

Flow Group:

Grade: 9

- 9 (57)
- 10 (6)
- 11 (72)
- 12 (42)

MISSING PORTRAITS: As you find students who are missing from your portrait sections, you can note them by going to your **eDesign Portrait Library > Import/Export > Insert Record**. This will build silhouette placeholders for you, and you can apply first name, last name, grade, and teacher/other to these records. These placeholders are what Portrait Flow will look at when you determine how you want to handle missing portraits.

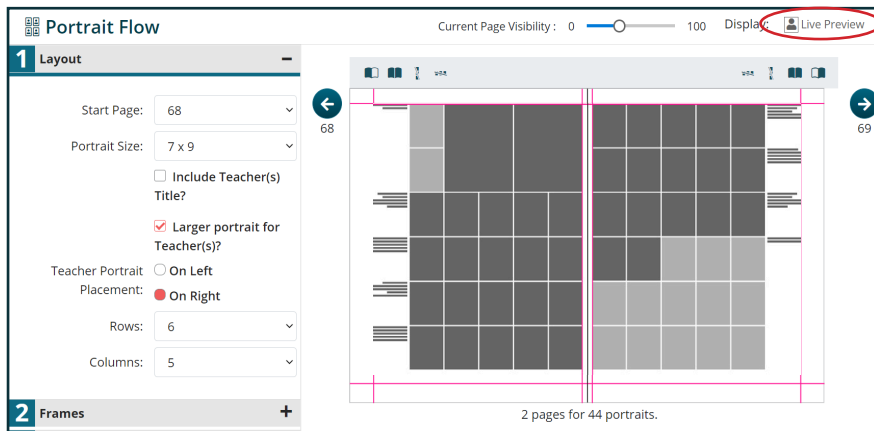


- The selected portrait groups have names without portraits. How do you want to handle these?
- Flow a 'Photo Not Available' graphic in place of the missing portrait
 - Flow a 'Not Pictured' list of names at the end of the portraits
 - Do not include missing portraits in the flow

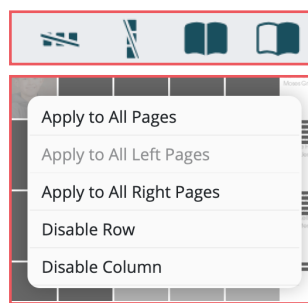
LAYOUT

15. **Select your Portrait size.**
16. If flowing your group by Teacher/Other, you'll find several options for how your previously chosen teacher portraits are handled.
 - **Check Include Teacher(s) Title** if you would like the title designations added to the teacher name (ex. Mr., Ms., Dr.)
 - **Check Larger Portrait for Teacher(s)** if you would like the teacher and assistant teacher portraits to be larger than the student portraits. The image size will automatically adjust based on the student portrait size and the column and row selections.
 - **Choose Teacher Portrait Placement** in the flow. The teacher and assistant will be placed at the start of each flow on either the right or left side.

Click Live Preview to see how your settings will appear with the actual portraits and names.

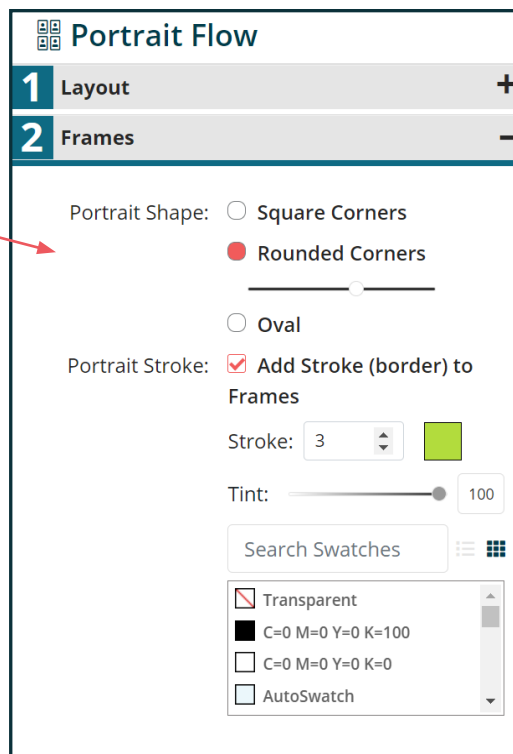


17. Adjust the amount of **Rows and Columns** if needed.
18. If you want to adjust the design, **click the gray portrait boxes in the Preview Window to activate or deactivate** individual boxes.
19. Using the icons at the top of each page or by right-clicking to bring up your context menu, you can disable an entire row or column at once. You can also tell Portrait Flow to apply the same design to all other pages in the flow (or all right or left pages.)
20. Use the arrow keys on the preview window to view and adjust additional pages in the flow.
21. **Click Live Preview** to preview the pages at any time during the design process. The Live Preview will also show you any existing elements that are currently on the pages included in this portrait flow group.



FRAMES

22. **Select the Portrait Shape.** If you opt for rounded corners, use the slider to adjust the roundness of those corners.
23. If you would like a stroke (border) around each portrait, **check the Add Stroke box.** Then, choose the stroke width and color.



LEARN ABOUT eDESIGN

Resources Videos

Search: portrait

- ▶ Flow Portraits
- ▶ Flow Placeholders
- ▶ Upload Portrait ZIP File
- ▶ Flow Names below Portraits
- ▶ Import Images from Another Year
- ▶ Flow Portraits with Additional Data

VIDEO TUTORIALS:

If you'd like to see all of this in action, click the Help button at the top of eDesign. Search for the word "portrait," and you see a listing of video tutorials that cover all aspects of portraits.

TEXT

24. Choose the **Character Style** for your portrait names. These styles can be created in **Settings tab > Design Styles > Character Styles**.
25. **Teacher Portrait Frames shape** can be changed to match the students.
26. Choose the **Name Order**.
27. Choose the **Text Position**. Names can flow to the side or below each portrait. If you choose names below, you can then opt to split the names onto two separate lines by checking the **First and Last on separate lines** box.
28. **Flow Additional information** - this option allows you to flow grades or other information like senior quotes along with the portrait. For more information on this, see this video tutorial in Help: "Flow with Additional Information."

SPACING AND MARGINS

Note: You'll only need to adjust spacing and margins when you are flowing names below the portraits or when you are trying to create a very custom flow.

29. Adjust the vertical and horizontal **Spacing between portraits**. *If you are including the custom text option, make sure that you leave enough vertical spacing for that extra text to properly fit under your portraits without being overset.*
30. Set the **Margins of the page**. This will create the boundary of the pages for the portrait boxes. *It's okay to leave this as is; it will automatically match your book's default margins. But if you want something different, this is where you do it!*
31. **Select Flow Portraits**.

3 Text

Character Style: Portrait Names

Name Order: First Last
 Last, First

Text Position: Side ←
 Below

Flow Additional Field: None

3 Text

Character Style: Portrait Names

Name Order: First Last
 Last, First

Text Position: Side
 Below ←
 First and Last on separate lines

Flow Additional Field: None

FLOW PORTRAITS AND REPEAT

If you are ready to flow multiple portrait sections/groups and you want those flows to have the same settings, choose **Flow Portraits and Repeat**.

This retains the same settings; you will just have to Name the new flow, verify the Start Page, and choose the new Portrait Group/s to include.

Flow Portraits

Review the portrait flow information before flowing. When you are ready to flow, click 'Flow Portraits'.

Flow Name: **9**

Page Range Needed For The Flow: **66-67**

Portrait Groups: **Placeholder**

Number Of Portraits: **57**

Portrait Size: **7 x 9**

Rows: **6**

Columns: **5**

Teacher Portrait Size: **Normal**

Character Style: **Portrait Names**

Text Position: **Side**

Frame Shape: **Rounded, Radius15**

Teacher Frame Shape: **N/A**

Cancel Flow Portraits and Repeat Flow Portraits