eDESIGN START-UP GUIDE
GETTING eDESIGN READY TO ROLL

This guide walks you through the steps to set up eDesign. The accompanying videos are in eDesign's Help Menu. If you need assistance, our tech team is happy to help! You may reach them weekdays at 877.362.7750 or https://herff.ly/techsupport

ON YOUR FIRST DAY IN eDESIGN

1. GET ACQUAINTED WITH eDESIGN.

- [ ] Watch curriculum tutorials for Lesson 1 and 2. PAGES 2-3

2. SET UP YOUR STAFF *(advisers only)*

- [ ] Give your returning staff access to this year's book. PAGES 4-6
- [ ] Delete former staff members. PAGE 6
- [ ] Create usernames and passwords for new ones. PAGE 7

3. REQUEST THE NAME LIST *(advisers only)*

- [ ] Request the Name List for your school. PAGE 8
- [ ] When you receive your name list, notify your rep.
- [ ] Import it into eBiz and eDesign.
- [ ] Make a plan to update it through the year.

DURING YOUR FIRST MONTH

4. PLAN YOUR LADDER AND ASSIGN TOPICS TO PAGES.

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- [ ] Create page topics in Settings. PAGES 9-10
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5. PLAN YOUR YEAR & ASSIGN DATES/STAFF TO PAGES.

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6. MAKE DESIGN DECISIONS AND PUT THEM IN eDESIGN.

- [ ] Check out the design resources available to you. PAGE 18
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- [ ] Activate fonts. PAGES 22-23
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TUTORIALS & GUIDES IN eDESIGN HELP
Search eDesign Help to access these support materials.

BRIEF VIDEO TUTORIALS

- Setting up Your Staff
- Import Name List
- Creating Topics
- Assigning Topics & Sections to Pages
- Creating Deadlines
- Assigning Deadlines to Pages
- Activating Templates, Mods and Art
- Activating Fonts
- Adding Color Swatches
- Creating Character Styles
- Setting Page Design Preferences
- Customizing Your Folio
- Creating Templates and Mods

DETAILED GUIDES TO MAXIMIZE AND STRATEGIZE

- Creating Topics with the Folio in Mind
- Assigning Staff to Pages at the Start
- Filtering the Ladder
- Moving Spreads on the Ladder
- Formatting Text without Highlighting It
- Customizing Your Folio
- Planning Strategic Deadlines
- Creating Colors While on a Page
- Creating Templates and Mods

OTHER RESOURCES TO HELP YOU EVERY STEP OF THE WAY
We want you to establish a process you *enjoy* as you create a yearbook you *love*, so we've loaded **myHJyearbook.com > Learn** with resources to equip, educate, encourage and even entertain. We'll support you through it all — from Day 1 until Distribution Day. From podcasts to PowerPoints and rubrics to routines, we've got what you need. We're by your side.

# STEP 1 — GET ACQUAINTED WITH eDESIGN

TASKS TO ACCOMPLISH

Watch the curriculum tutorials in Lesson 1 "Navigating Your Book" and Lesson 2 "Using the Image Library." You can save the other lessons for later, but watching these now will lay a foundation for you.

PURPOSE OF THESE TASKS

Gaining a foundational grasp of eDesign's interface will help you feel more comfortable, and it will help your work on the start-up tasks be more efficient.

HOW TO GO ABOUT IT

1. **Click the Help tab** in the navigation panel. The Help widget will open.
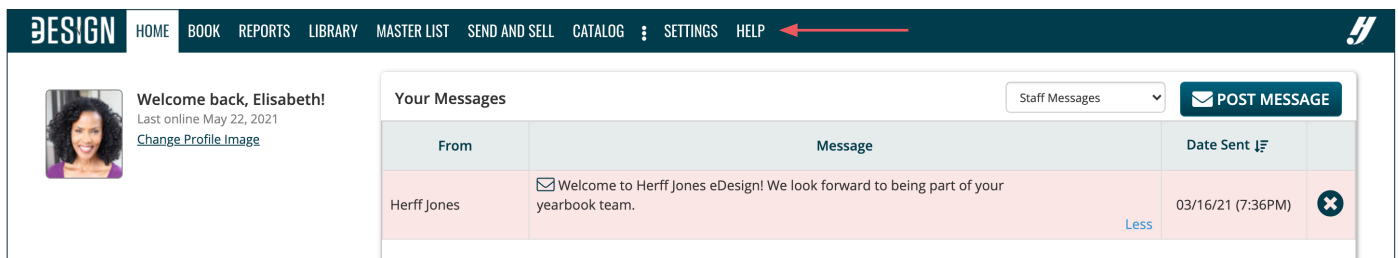
2. **Click the link for "eDesign Help and Curriculum."** The Help site will open in another tab. Then click on eDesign Curriculum. **Watch the**
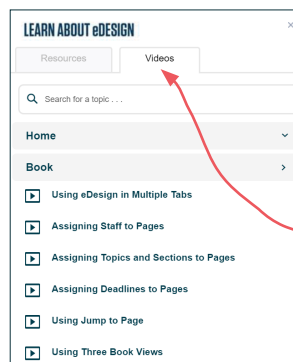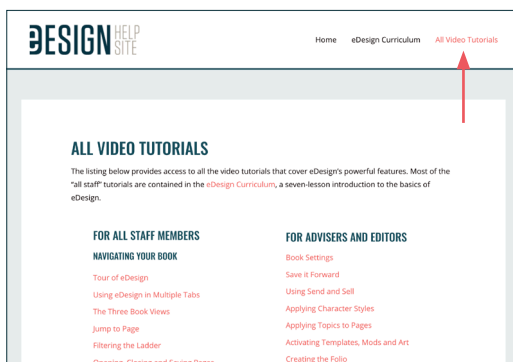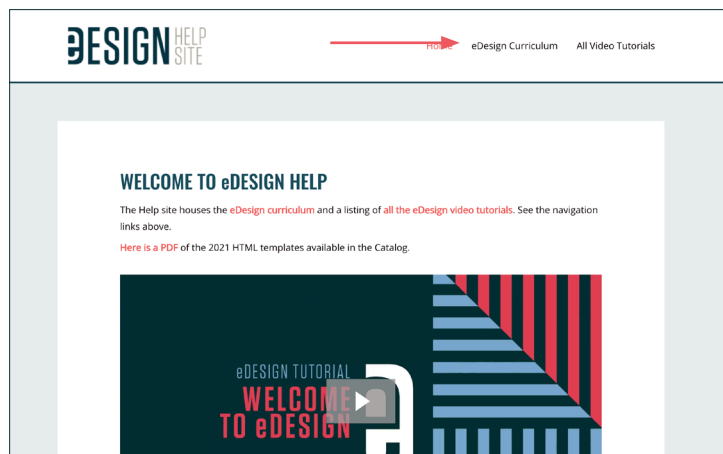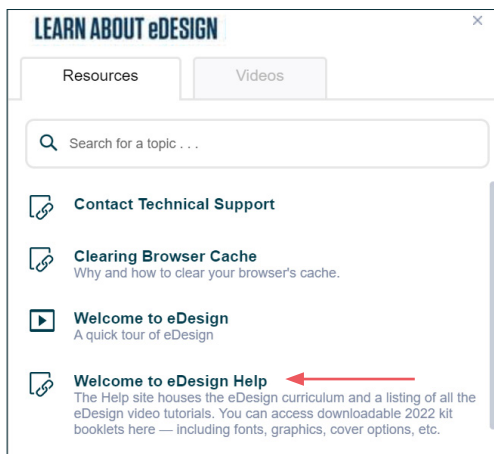

ADDITIONAL TUTORIALS FOR LATER
In addition to the eDesign curriculum, the Help site contains an extensive collection of tutorials. Simply click on **All Video Tutorials** to access them on another tab in the Help site.

You can also access videos by clicking on Video tab in the Help widget.

tutorials in Lesson 1 and Lesson 2.

The curriculum videos are designed to give you and your staff an orientation to the basics of eDesign. They are organized with a scope and sequence that builds one skill on top of another. You can also view these videos on a individual basis by clicking on All Video Tutorials.
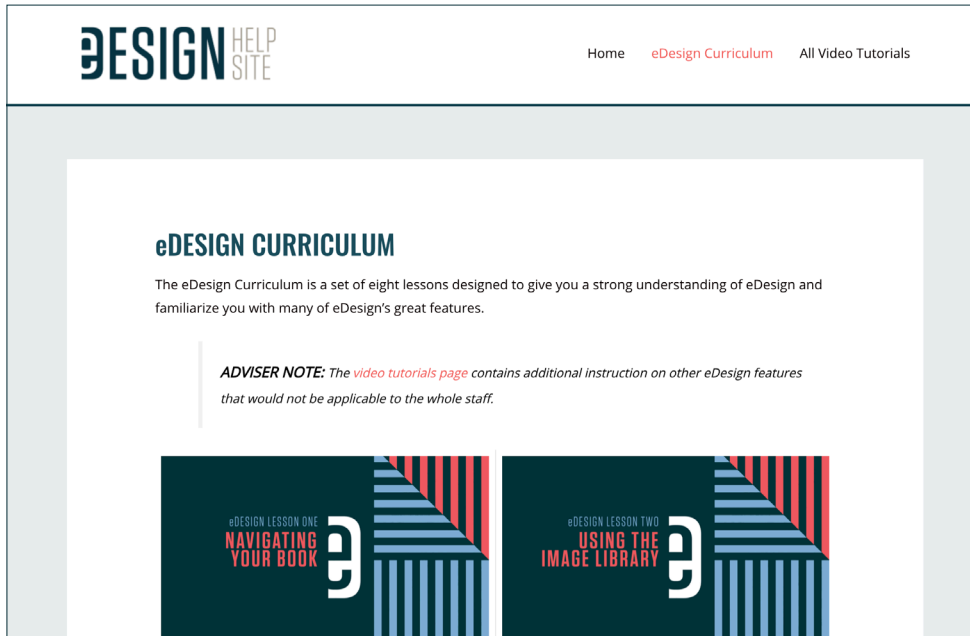
Each lesson in the curriculum has a PDF of guided notes with practice exercises for each video tutorial. These are great for your students to use when they watch the tutorials, and if you are one who loves to take notes, these can also be helpful to you now as you set up your book.
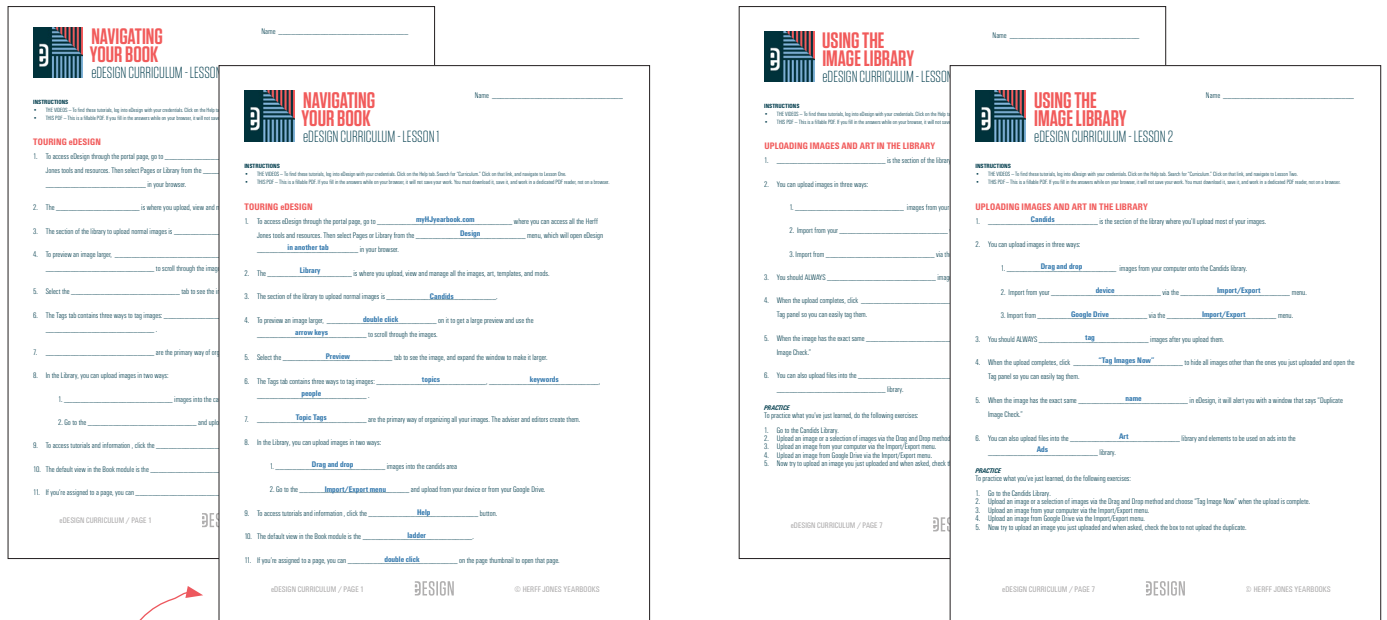
For advisers — Answer keys are in the Help Widget.
Search for "answer key" to find the PDFs with the answers in blue.

Only advisers have access to these.

STEP 2 — SET UP YOUR STAFF (ADVISER ONLY)

TASKS TO ACCOMPLISH

- ☐ Watch the tutorial "Setting Up Your Staff."
- ☐ Give the returning staff members access to this year's book.
- ☐ Change roles from Staff to Editor.
- ☐ Auto-assign staff members to pages as needed.
- ☐ Delete former staff members.
- ☐ Create logins for new members.

PURPOSE OF THESE TASKS

This is an important step in setting up your book because your students will not be able to access it until you activate them as a user for this year's book.

HOW TO GO ABOUT IT

1. **Give returning staff members access to this year's book.** Click on Settings in the menu bar.

For advisers, Settings opens to Staff Setup. Editors do not have access to Staff Setup, so they will not see Staff Setup when they open Settings.

Next, click on a staff person's name, and click Edit.

The Edit Staff window will open where you can complete several tasks.

First, check the box next to the book you want them to access.

When applicable, change the user's role from Staff to Editor.

Then, when applicable, check the box to auto-assign that user to all pages of the book. If you do, they will have access to edit all pages in the book. On the ladder, you will have the ability to unassign them from specific pages like ad pages, dedication pages, thank you page, etc.

Edit Staff

*First Name: Jackie

*Last Name: Chan

*Email: jaychan@email.com

*Username: jaychan

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

*Role: Editor

☑ Can edit all pages

Check this box to grant the user access to edit all pages. Uncheck the box to remove all page editing privileges and assignments for this user.
Note that you can still unassign users from individual pages with this box checked.

☐ Reset with temporary password

Cancel | Resend Password Email | Save Changes

To commit the changes you've made in the Edit Staff window, click the Save Changes tab at the bottom. Doing so will save the changes and take you back to the Staff Setup window.

Edit Staff

☑ Reset with temporary password

Temporary Password: create password 👁

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

*First | Editor

*Last | Can edit all pages

s

OK-MAINBOOK
OK-MAINBOOK
OK-MAINBOOK
☐ 2021 YEARBOOK-MAINBOOK

*Us

☐ Reset with temporary password

Cancel | Resend Password Email | Save Changes

You don't need to create a new password for a returning staff member.

They can use the same one as last year, or the Adviser can reset with a temporary password.

Advisers can reset the password to something generic (as long as it meets the new password requirements).

Please Update Your Password

Your temporary password is only good for a single use.

Please click to update your password.

Update Password

When the person firsts signs in with the temporary password they will be asked to update their password.

EDESIGN

Users are able to create a new, 16 character password - as well as answer a series of security questions (in case they ever forget their password and need to recover their account. The email address can also be added or changed here if that is a valid option for resetting the password.

2. **Next, delete last year's staff whom you no longer want to access eDesign.** Simply click on the name and then click on the red trash can.

3. **Finally, you'll want to add new staff members.** Click the Add button.
   Enter all the fields except email, which is only needed when creating a user who is an adviser.

Add Staff

First Name:

①

Last Name:

Email:

② **Username:** create username

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

③ Learn about validating staff members

Validate with: ○ Email

④ ● Temporary Password

Temporary Password: create password

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

Role: ⑤ Staff

⑥ ☐ Can edit all pages

Access projects

⑦ ☑ 2024 YEARBOOK-MAINBOOK
☐ 2023 YEARBOOK-MAINBOOK
☐ 2022 YEARBOOK-MAINBOOK
☐ 2021 YEARBOOK-MAINBOOK
☐ 2020 YEARBOOK-MAINBOOK
☐ 2019 YEARBOOK-MAINBOOK
☐ 2018 YEARBOOK-MAINBOOK
☐ 2017 YEARBOOK-MAINBOOK
☐ 2016 YEARBOOK-MAINBOOK

Cancel   **Add Staff**

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❶ Enter the staff member's first and last name.

❷ Create a username and password. Since the username needs to be unique, it can be helpful to include your school's job# in it (ex: josegonzales2673).

❸ Check out a quick video if you need further assistance, or have any questions about how staff user credentials are validated.

❹ You can choose to have users validate with and email address or a temporary password you set up.

❺ Change the user's role if need be.

❻ Check the box if you want to give the user access to edit all pages.

❼ Check the box to give the user access to this year's book.

ƎDESIGN

STEP 3 — REQUEST THE NAME LIST & IMPORT IT (ADVISER ONLY)

TASKS TO ACCOMPLISH

☐ Request the Name List from a clerk at your school. Let your rep know when you receive it in case they have special instructions for you.

☐ In eDesign's Help Menu, search for "Name List." This detailed guide will walk you through importing it into eBusiness and then into eDesign.

☐ Make a plan to change legal names to preferred names as needed and to import an updated list to add new students through the year.

10 WAYS YOU CAN USE THE NAME LIST IN eDESIGN

The Name List saves you time, gives you peace of mind, and helps you include more people your book. You can use it to accomplish these tasks:

1. Tag photos with names – LIBRARY AND PAGE DESIGN

2. Search for photos by tagged names – LIBRARY AND PAGE DESIGN

3. Spot misspelled names and quickly correct them – NAME CHECK

4. Put text under the photo with tagged names – CAPTION BUILDER

5. Create captions for group photos with the names in row order *(tag faces with names)* – CAPTION BUILDER

6. Monitor coverage, both frequency and location – COVERAGE REPORT

7. Include names in the index and coverage data even if you don't put names on pages (*tag photos with names*) – INDEX BUILDER

8. Export a not-pictured list to paste on pages – COVERAGE REPORT

9. Add coverage and sales data to email messages – SEND AND SELL

10. Accurately combine names in the index using its built-in Name List indicator – INDEX BUILDER

HOW TO GO ABOUT IT

In eDesign's Help Menu, search for "Name List" to find a PDF guide and a tutorial.
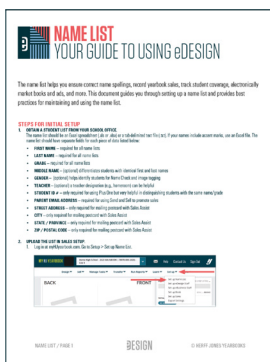
Here are a few helpful notes:

• You first import the list into eBusiness and then import it into eDesign. That's because eBusiness and eDesign share the same list. eBusiness populates sales data for eDesign's Coverage Report and Send and Sell.

• It is valuable to periodically import an updated list into eBusiness to add new students and to change legal names to preferred names (like changing Zachary vs. Zach or Mary Grace to Grace) because Name Check, Send and Sell, and the Coverage Report all reference it.

• Changing a name in the Name List does NOT change the name with the portrait in the library. Portrait names have to be changed in the library where that data lives after importing the photographer's PSPI file.

When you are ready to import the Name List, this is where you'll do it:
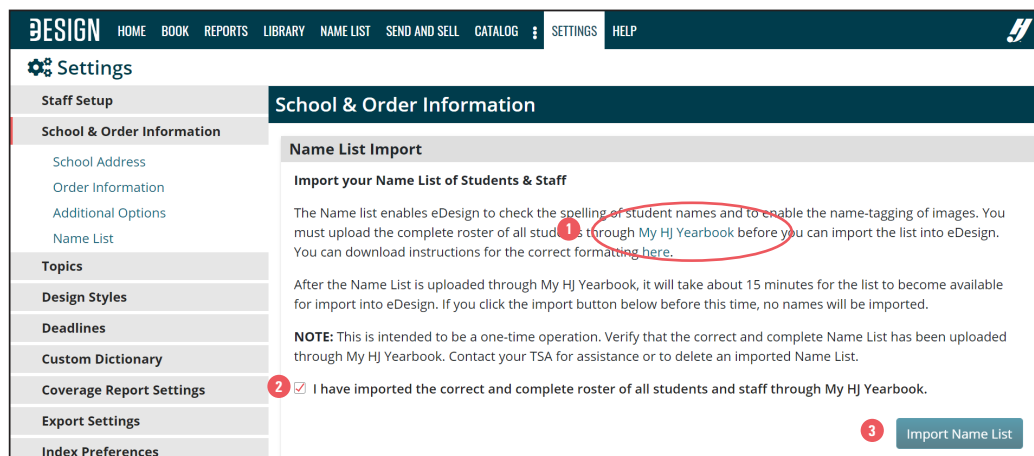
❶ First, click on the blue My HJ Yearbook link, which will take you to eBusiness to import the list.

❷ Then, after you import it into eBusiness, you'll come back to Settings in eDesign and check this box.

❸ Finally, click on "Import Name List."

# STEP 4 — PLAN YOUR LADDER AND ASSIGN TOPICS TO PAGES

TASKS TO ACCOMPLISH

☐ Watch "Creating Topics" and "Assigning Topics and Sections to Pages."

☐ Plan your ladder. Decide what topics you want to include in this year's book and how you want to organize your book.

☐ Create topics in Settings (which you can also use for sections), and apply topics and sections to pages in the ladder.

PURPOSE OF THESE TASKS

This step creates the organizational structure of your book and helps you make sure you've allotted pages for everything you want to include.
First you decide which topics you want to include and how you want to organize your book, and then you assign topics and sections to pages..

HOW TO GO ABOUT IT

1. **Plan your ladder.** Reference your book from last year. If you want more ideas or assistance, go to myHJyearbook.com > Learn > Teaching Materials.

2. **Create your topics in eDesign.**
   You can create topics in three places — 1) in Settings, 2) in the library, and 3) on the ladder. An efficient place to start is in Settings.
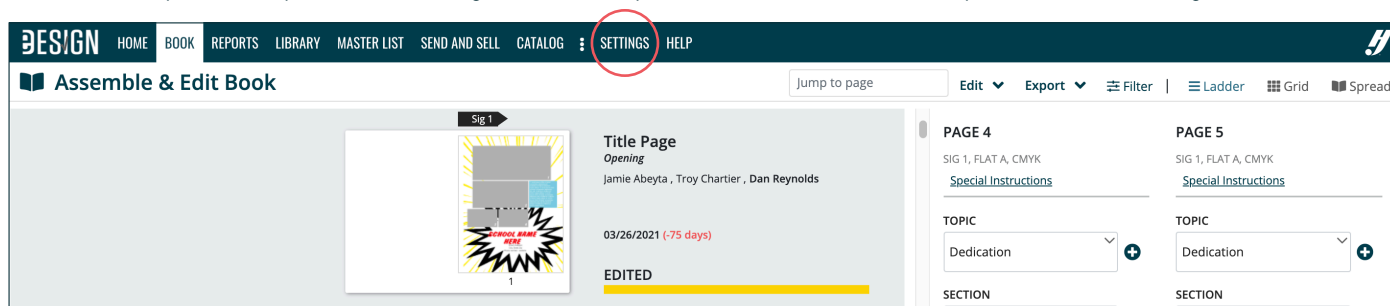
Click on Topics. You'll see two fields: Suggested Topics (searchable topics you can add to your list) and My Topics (topics you activate or add).
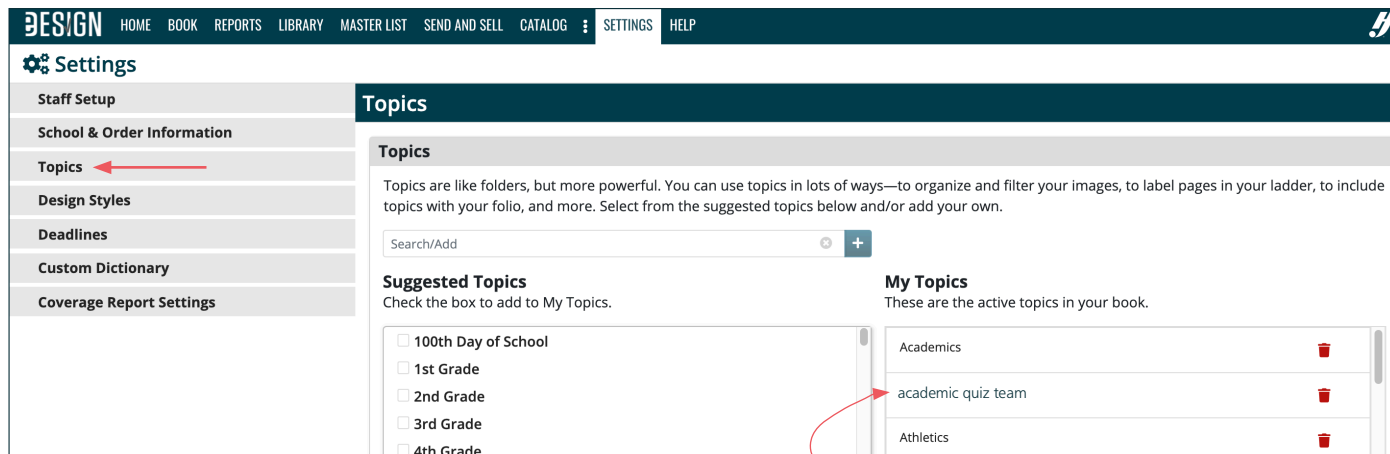
eDESIGN CAN ADD TOPICS AND SECTIONS TO YOUR FOLIO.
All you have to do is set it up once, and eDesign will add it to every page. If that suits you, before you add topics, search eDesign Help for "**Creating Topics with the Folio in Mind**" to see examples and learn efficiencies.

Pro Tip — If you want all caps or all lower case in the folio, type it that way in Topics.

142 *academic quiz team*
CLUBS - *We make it real!*

Add, revise and delete topics.
- To add a topic, begin typing it in the Search/Add field. The search will filter both topic lists.
- *In the example below, both lists are filtered for "basket."*

To add one of the suggested topics to your list, simply check the box next to the topic, and it will be added to your list of topics on the right.

To create a new topic, type in the field and hit Enter/Return on your keyboard or click the plus icon.

To remove a topic from your list, click on its trash can.

YOU CAN CREATE TOPICS IN THE LADDER & LIBRARY, TOO.
You're currently creating topics in Settings, but later when you're in the middle of a task, you don't have to stop to go here. You can create topics the ladder and in the library, too.

3. **Assign topics and sections to pages.** You can assign topics and sections in all three book views. Working in the Ladder or Grid Views is optimal because you can Shift-click or Control/Command-click to select multiple pages and apply Topics and Sections to the group of pages all at once.
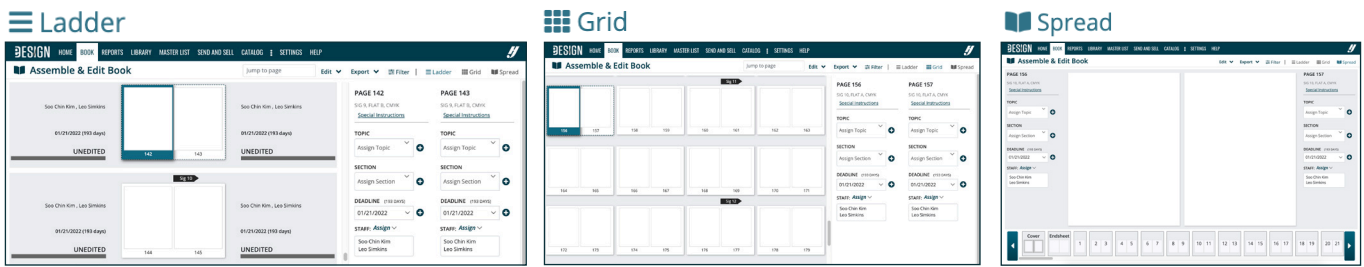
To apply a topic to a page, click on the page, and then begin typing the topic. The list will dynamically filter, and you can select the topic you want.

Then, when you select the topic from the list, it will assign it to the page.

HOW TO ALLOT PAGES FOR PORTRAITS BEFORE YOU HAVE THEM

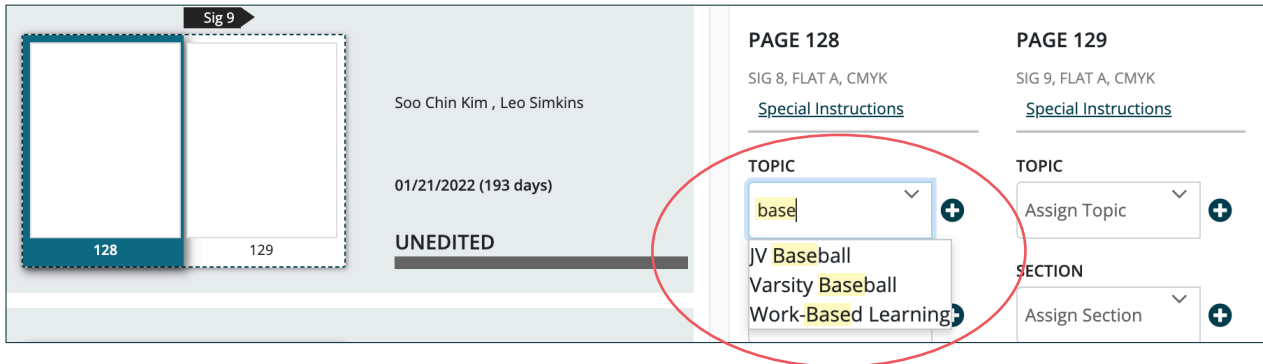There are two ways to plan your portrait pages before you have the portraits:

1. **Flow placeholder portraits.** Use your current enrollment numbers. eDesign will do the math for you. You can even knock-out spaces for other content you want to put on portrait pages so you'll know you have reserved enough room for it all.

2. **Use last year's page allotments.** Modify the number of pages for each group to allot for class size changes. Unless there are special circumstances, class sizes don't change much.

When you are in the Ladder View or Grid View, you can also Shift-click to select a range of pages to assign topics to multiple pages simultaneously.

You can also use the Control/Command key to select non-consecutive pages to assign topics to them simultaneously.

As you apply Topics to pages, you can also apply Sections using the same principles. Applying Sections is optional, but doing so will help you quickly see how you've divided up your book.
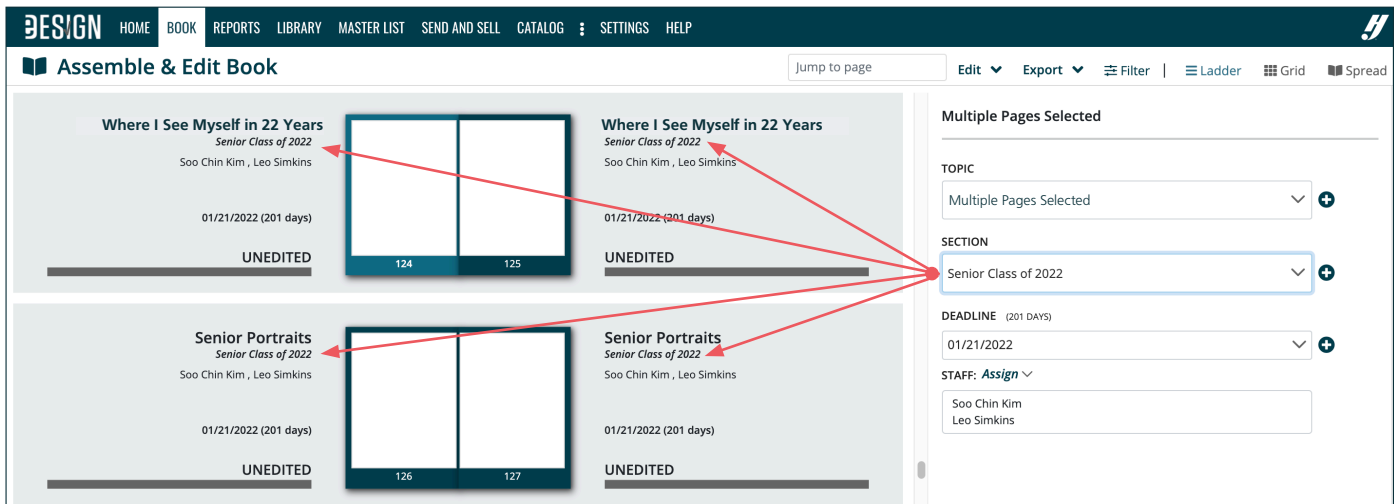
Reminder – A benefit to applying Sections to pages is eDesign can automatically add them to your folio.
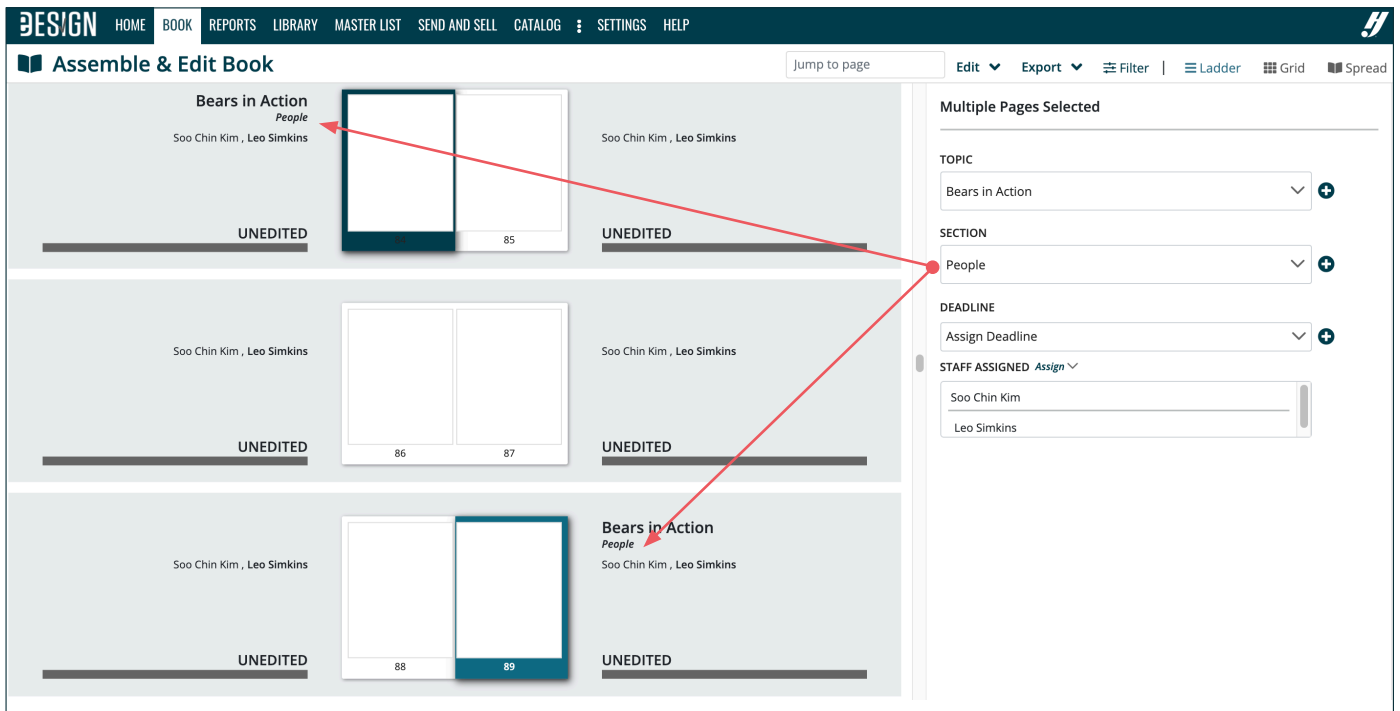You get to pick the fonts and set it up once, and then eDesign will add it to every page for you. Then you can turn it off on pages where you don't want it and toggle it from default to black or white where needed. Here's an example:

142 **Where I See Myself in 22 Years**
SENIOR CLASS OF 2022
← TOPIC FROM THE LADDER
← SECTION FROM THE LADDER

ADDING TOPICS AND SECTIONS TO YOUR FOLIO
Want to learn more about adding Topics and Sections to your folio? Want to boost your creativity and efficiency? Search eDesign Help for "folio" to find two guides packed with examples: **"Creating Topics with the Folio in Mind"** and **"Customizing Your Folio."**

4. **Check to see if you've forgotten to apply any topics.** There are two ways to see if you have missed any topics. The first method is to create a preview of your ladder. Go to the Export menu, and choose to either preview your ladder with images or without them. After you select which one you want, it will open in a new tab that you can print or save to your computer.
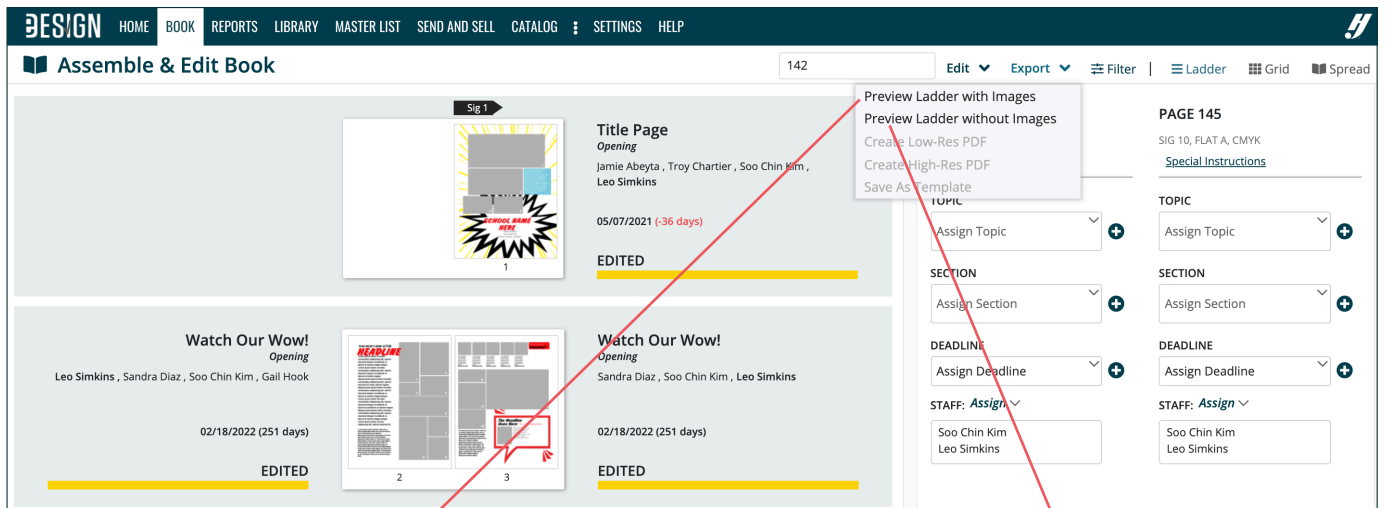
PREVIEW OF LADDER WITH IMAGES

PREVIEW OF LADDER WITHOUT IMAGES
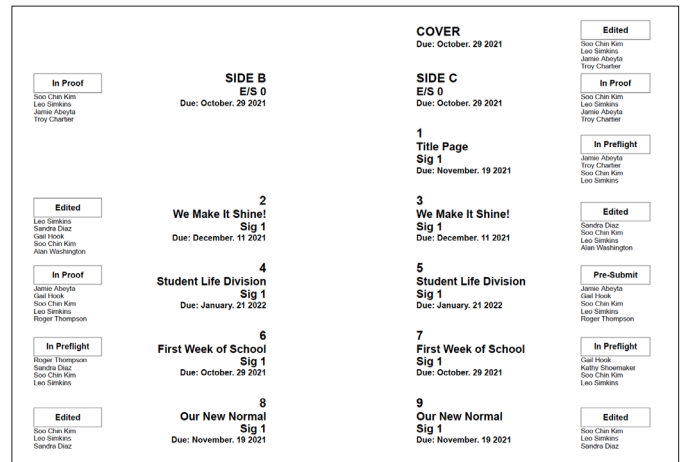
A second method is to search for a topic in the Jump To field. If the topic is not assigned to a page, eDesign will pop up a message and tell you so.

IF YOU'VE MISSED A TOPIC, YOU CAN MOVE A SPREAD WHERE YOU NEED IT.
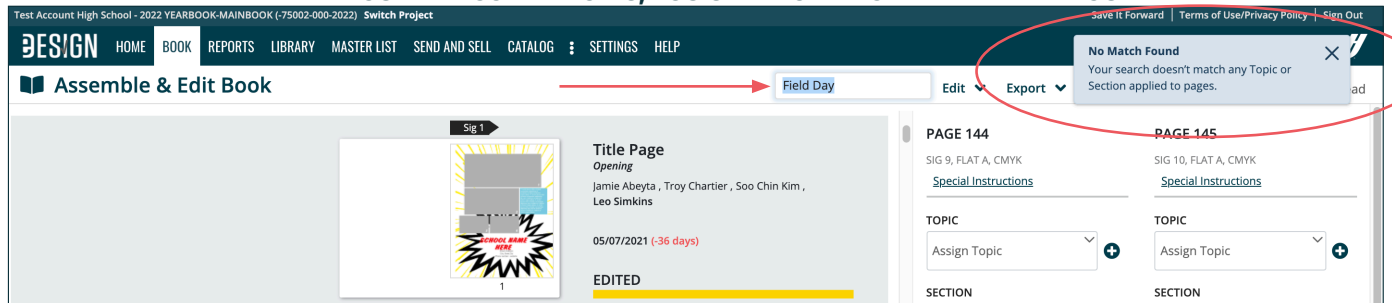
Check out how to save time by moving spreads.

REALIZE YOU MISSED ONE?
You don't have to re-do your work to fix it. You can move spreads instead. To see how, search eDesign Help for "Moving Spreads on the Ladder."

STEP 5 — PLAN YOUR YEAR & ASSIGN DATES/STAFF TO PAGES.

TASKS TO ACCOMPLISH

☐ Watch "Creating Deadlines" and "Assigning Deadlines to Pages."

☐ Plan a production schedule with strategic deadlines that gives ample time to complete and review pages prior to submission.

☐ Enter your strategic deadlines into Settings. Remember, the deadlines you put in eDesign are between you and your staff, but the plant deadlines are your official submission deadlines to keep the production of your book on track.

☐ Apply your strategic deadlines to pages in the ladder.

☐ Then assign staff members to pages.

PURPOSE OF THESE TASKS

Making a plan at the start of the year will go a long way toward minimizing stress and maximizing productivity. Assigning a deadline to every page in the ladder helps you achieve five goals:

1. You can distribute your work throughout the year.
2. You can filter your ladder to check for any pages you haven't accounted for.
3. You can filter the ladder by deadline to see if you'll have enough pages to meet each deadline.
4. You can reduce confusion about a page's due date because staff members can easily see the deadline in eDesign.
5. You can filter the ladder by deadline to focus your attention on pages that are due.

HOW TO GO ABOUT IT

1. **First plan a production schedule** with strategic deadlines that provide you with ample time to complete and review pages prior to submission.

2. **Then put your due dates into eDesign. Go to Settings > Deadlines.**

   On the left are your plant deadlines for your quick reference. On the right is where you'll enter your strategic deadlines.

   The deadlines below are samples from another school. Don't use these. Enter your own strategic due dates.

1. Click Add.
2. Select a deadline.
3. Click Add Deadline.
4. Repeat steps to add another.

Don't know how to start?
Want to create a better plan than last year?

Then pause your work and check this out.

WANT TO PLAN LIKE A PRO?
Want more order and less chaos?
Want more quality and less filler?
Want more fun and less stress?
Search for **"Planning Strategic Deadlines"**
in eDesign Help to learn more.

3. **Assign due dates to pages.** Go to one of the Book views. Click on a page, and then select the deadline from its drop-down menu on the right.

   Like all page assignments, you can Shift-click to select a group of pages or Command/Control-click to select multiple non-consecutive pages.
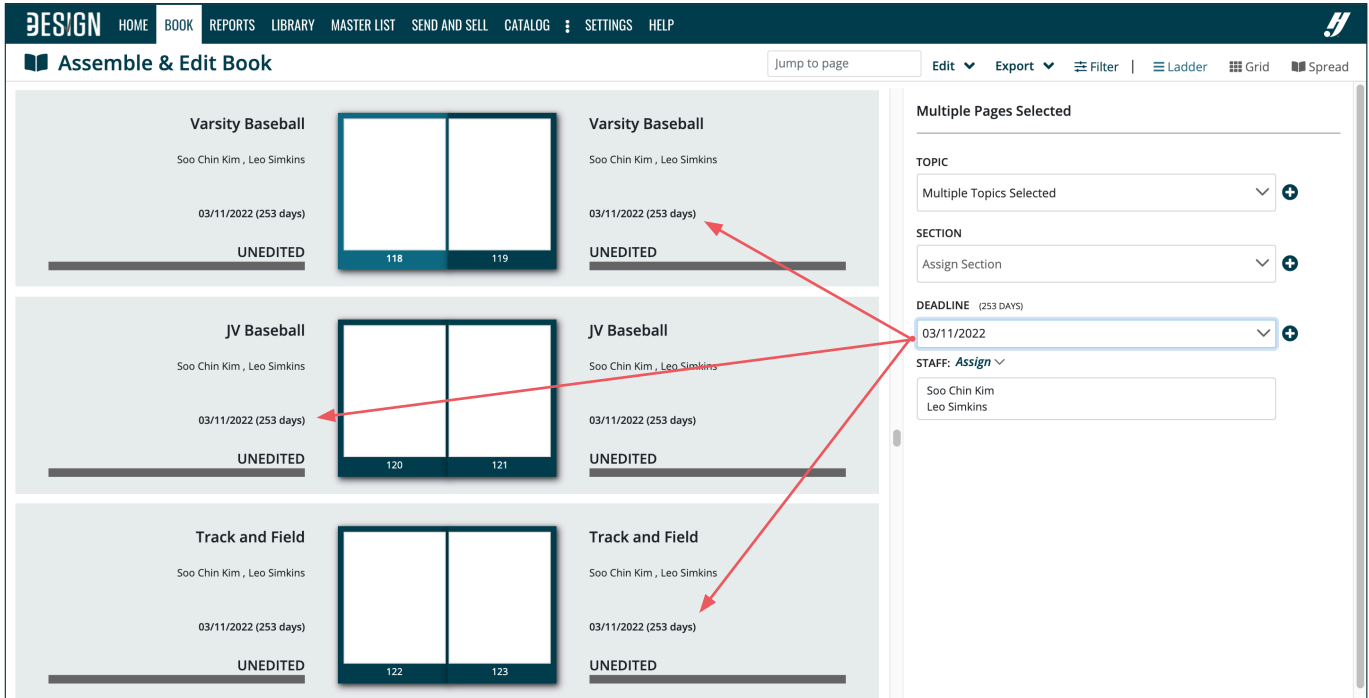
To assist your work, you can use the Filter menu to find pages you haven't assigned to deadlines. Go to Filter > Deadline > No Deadline.

You can also filter the ladder to see how you have distributed your work across the deadlines to see if any are overloaded or underloaded. To do that, go to Filter > Deadline and select any of the deadlines. It will filter the ladder for only those pages and show the number of pages in the left corner.

QUICKLY FIND PRECISELY WHAT YOU NEED
Filtering the ladder will be very helpful to you not just now, but also all year long. Search for **"Filtering the Ladder"** in eDesign Help to learn more.
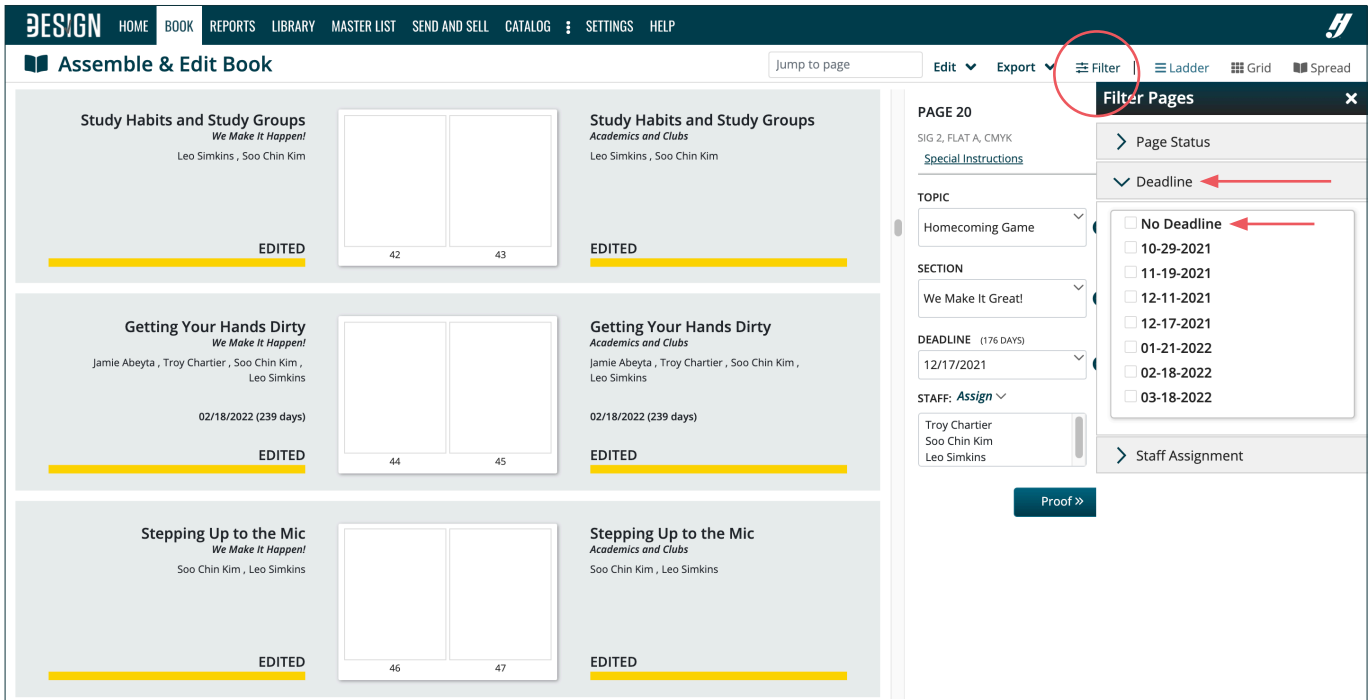
You can also go to Settings to monitor pages allotted to deadlines. Go to **Settings > Deadlines** and look at the subtotal on the right.

You can also filter the ladder to see how you have distributed your work across the deadlines to see if any are overloaded or underloaded. To do that, go to Filter > Deadline and select any of the deadlines. It will filter the ladder for only those pages and show the number of pages in the left corner.

Here in the upper left corner, eDesign gives you a subtotal of the pages you've filtered. In this example, 13 pages have been assigned to the November 19 deadline so far

You can also go to Settings to monitor pages allotted to deadlines. Go to **Settings > Deadlines** and look at the subtotal on the right.

Check out this efficient way to work.

TIME-SAVING TIP — OPEN SETTINGS IN A NEW TAB
A quick way to do this is to open Settings in a new tab and "tab dance" between Book and Settings. Right click on Settings and choose "Open in New Tab." Then you can bounce back and forth in your browser.

When you make changes in Book, refresh your browser when you to go back to Settings.

4. The last step is to assign staff to pages.

You assign staff to pages using the same principles for applying Topics, Sections and Deadlines. Go to one of the Book views.

- Click on a page, and then select the staff member's name from the list. As it is when applying any page assignments, you can Shift-click to select a group of pages or Command/Control-click to select multiple non-consecutive pages.

- Click on Assign to open the drop-down list of staff members. You have two options:

  1. **EDIT** – People designated with only Edit can work on the page but ARE NOT RESPONSIBLE for creating the page. Checking this box gives them access, but it doesn't put that person's name on the ladder, which helps prevent confusion.

  2. **ASSIGN** – Checking this box gives the staff member access to edit the page and shows they ARE *responsible* for creating the page. It puts the student's name on the ladder, which is an indication they are responsible for creating that page.

ASSIGN - Responsible for the Page
Soo Chin & Leo
In this example Soo Chin and Leo are assigned to the page. They are responsible to create it.

EDIT - Can Edit the Page
Maria – She has access to open and edit the page, but she's not assigned to it.

GREAT REASONS TO ASSIGN ALL PAGES TO STAFF AT THE START OF THE YEAR

Some advisers prefer to assign pages to students as the year progresses, which works as long as you have coverage teams and photographers who are getting content for all pages all year.

If that is not the case for you, consider these three benefits to assigning ALL the pages of your book to staff members at the START of the year

1. Improve the quantity and quality of page content.
2. Prevent pages from getting forgotten.
3. Create clear communication with your staff.

To read more details and get ideas, search eDesign Help for **"Assigning Pages to Staff from the Start."**

TWO NOTEWORTHY ITEMS ABOUT EDIT STATUS

1. Since Maria has only "Edit" status, Maria's name is NOT on the ladder. That way it's clear that Soo Chin and Leo are the ones responsible to create the page.

2. If you filtered the ladder by Maria's name in the Staff Assignments filter, these pages would not show up because she's not assigned to them. When you filter by a staff member's name, only the pages with the "Assign" checked will filter.

# STEP 6 — MAKE DESIGN DECISIONS AND PUT THEM IN eDESIGN

TASKS TO ACCOMPLISH

- ☐ Review the available resources. Activate any assets in the Catalog that you want to use. TUTORIAL - "Activating Templates, Mods and Art"
- ☐ Look over the Font Collection booklet and Font Poster in your kit and activate the fonts you'd like to use. TUTORIAL - "Activating Fonts"
- ☐ Look over the colors poster. Decide which colors you want to use and activate them. TUTORIAL - "Adding Color Swatches"
- ☐ Edit existing character styles and create new ones if desired. TUTORIAL - "Creating Character Styles"
- ☐ Adjust your page design preferences if desired. TUTORIAL - "Setting Page Design Preferences"
- ☐ Open the Folio spread and customize it if desired. TUTORIAL - "Customizing Your Folio"
- ☐ Customize templates/mods you activated from Catalog or create your own. TUTORIAL - "Creating Templates and Mods"

PURPOSE OF THESE TASKS

The purpose of these tasks is to lay the creative foundation for all your pages. This can be really fun, but don't stretch it out too long. The earlier you complete this step, the easier it will be for you and your staff to work as a team to efficiently, consistently, creatively and successfully complete pages.

HOW TO GO ABOUT IT

1. **Check out the available templates, mods and art.** You can go straight to the Catalog to view ALL the design assets available in eDesign for you to design pages, or you can first look through a few resources that preview a sampling of what's available. For any of these resources, go to herff.ly/ybk-resources > THEN SCROLL TO THE BOTTOM AND CLICK "DESIGN + INSPIRATION SUPPORT".
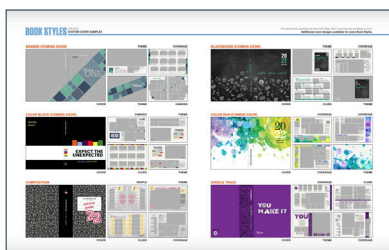
BOOK STYLES – In your kit and online.
The PDF shows the 33 Book Styles in great detail with previews of each design's style guide, customizable cover, and collection of templates. Plus, it shows the extended collection of pre-designed covers so that you can add to your library any corresponding artwork, borders and backgrounds that you want to use.
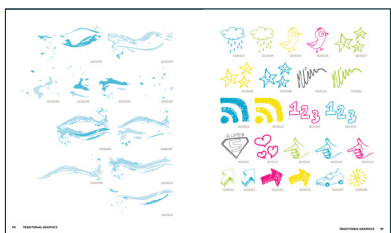
BUT WAIT. THERE'S MORE! – In eDesign's Catalog, you can see a TON of additional templates that you can add to your Template Library, as well as being able to search for art there - by its number, easily adding it to your Art Library with the click of a button. All of our "traditional", long-standing graphics can be found in the Catalog.

MORE IN CANVA, TOO! – You can also access an expansive variety of searchable and customizable art and backgrounds in Canva. After customizing it, you can save it from Canva directly into your Art Library.
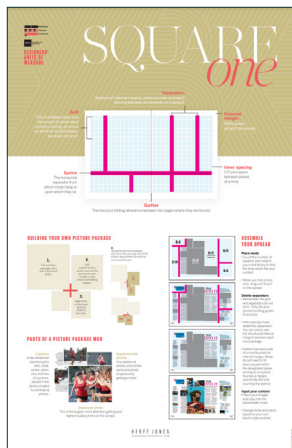
MOD STYLES POSTER – In your kit and online.
The Mod Styles poster shows the types of mods you'll find in eDesign's Catalog and how you can customize them to expand the coverage in your book. It also shares strategy for planning the mod's content and selecting the right style.

SQUARE ONE POSTER – In your kit and online.
This poster helps you understand what the Square One templates and mods in eDesign's Catalog are all about. Square One is our system for creating custom layouts on the Swiss Grid using a robust collection of templates and mods.

To learn how to design with Square One go to: myHJyearbook.com > Learn > Teaching Materials > Layout and Design

2. Activate resources in the Catalog.

If you'd like to begin with a tutorial, search in the Help menu for "Using the Catalog." To begin, click Catalog up top. You'll first see the Book Styles. If you click on a thumbnail, you will see a larger preview of it on the right.
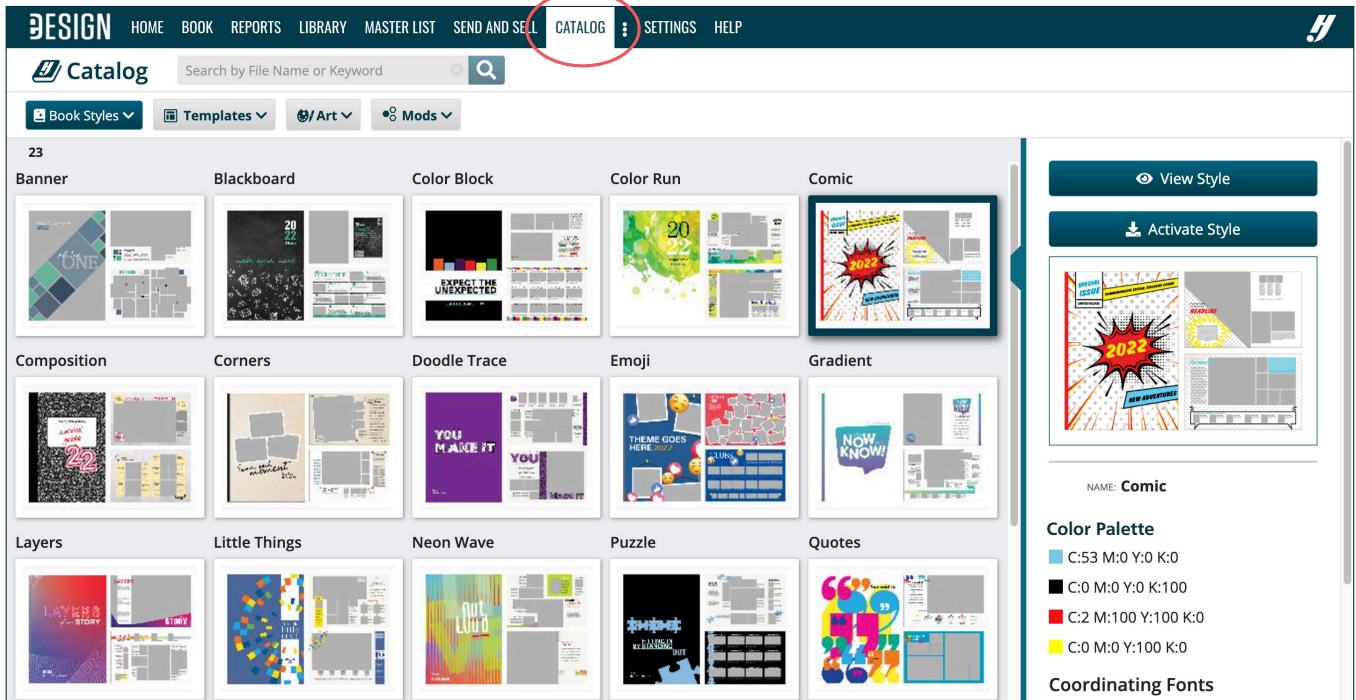
Book Styles is a one-stop-shop for efficient and fun yearbook design.

Each style has a cover with coordinating layouts, mods, art, fonts and colors.

You can customize them, including the colors and fonts, or use them as is.

When you activate a book style, all of its assets will be loaded into your book, so you'll be ready to roll!
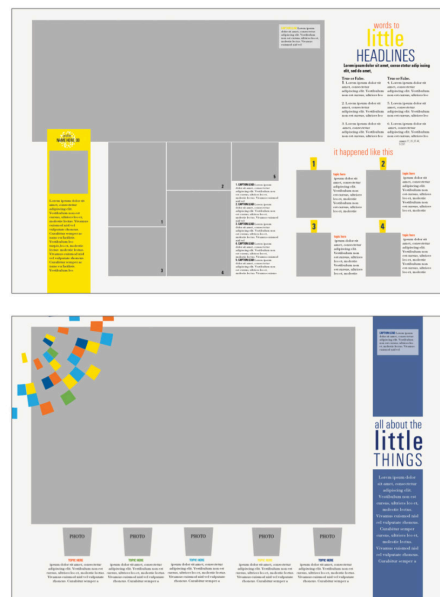
The preview shows a cover and two layouts, and below that will be the colors and fonts.
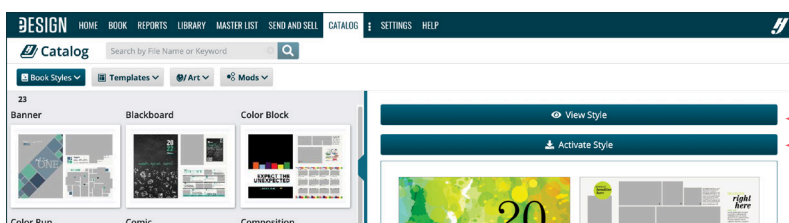
Just as you can in the Library, you can expand the Preview window to make it larger.

To view all the assets for that style, click "View Style."
To add all the assets to your library, click "Activate Style."

To explore templates in the Catalog, click on Templates and select an option, and the assets will immediately pop up for you to view.

View All	View All	View All	View All
01 Book Styles	**02 Square One**	**03 More Templates**	**04 Ads**
All In	Square One	Single Left Pages	Black and White
Banner		Single Right Pages	Block
Biography		Trendy	Bold Circle
Blackboard		Topics	Bold Lines
Color Block			Circles
Color Run			Color Progression
Comic			Gray
Composition			Modular
Corners			Online Ad
Doodle Trace			

You can start with something and customize from there!

There are a wide variety of templates:

- some highly decorated
- some minimally decorated
- some with no decoration
- some on a document grid
- some on the Swiss grid
- some with caption and copy
- some scrapbook pages.

You can find all kinds of templates so that no matter your style, you can get a leg up and start with a layout on the page and customize from there.

To activate templates, Shift-click or Ctl/Command click to select them.
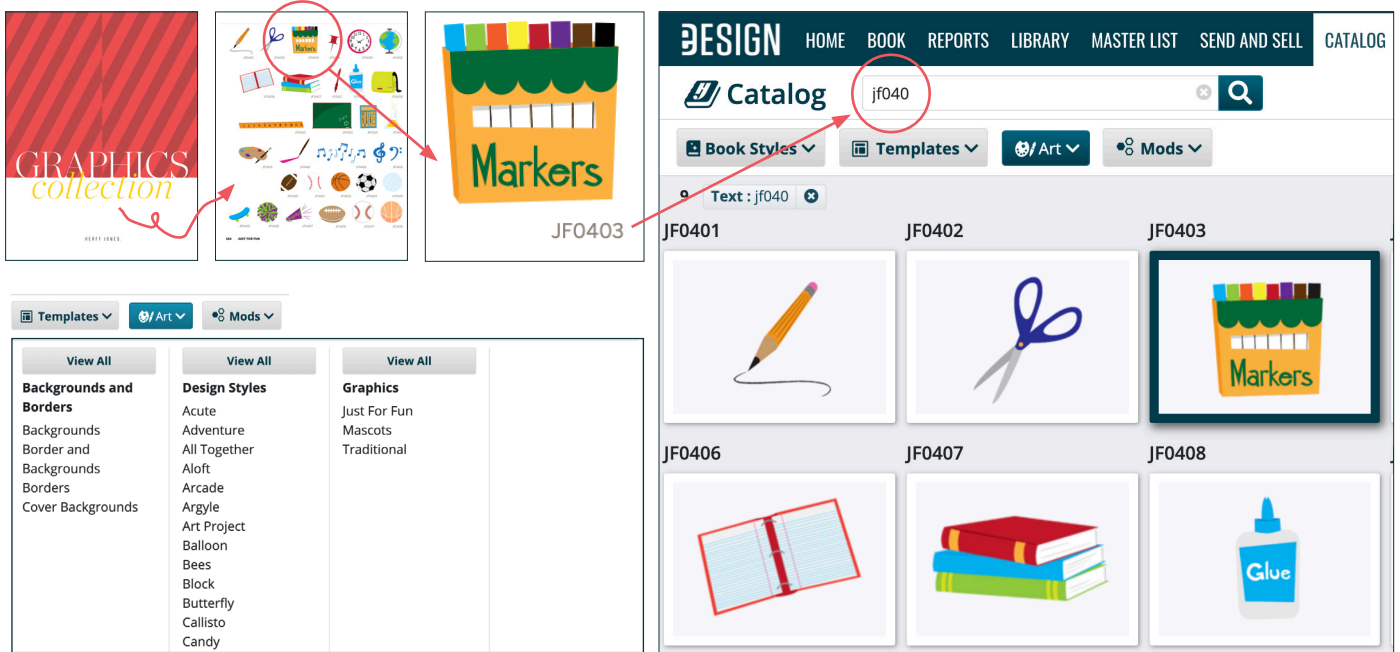
Then click "Add to Your Library."

eDesign will then designate them as having been added to the library, and they will be in the Library for you.
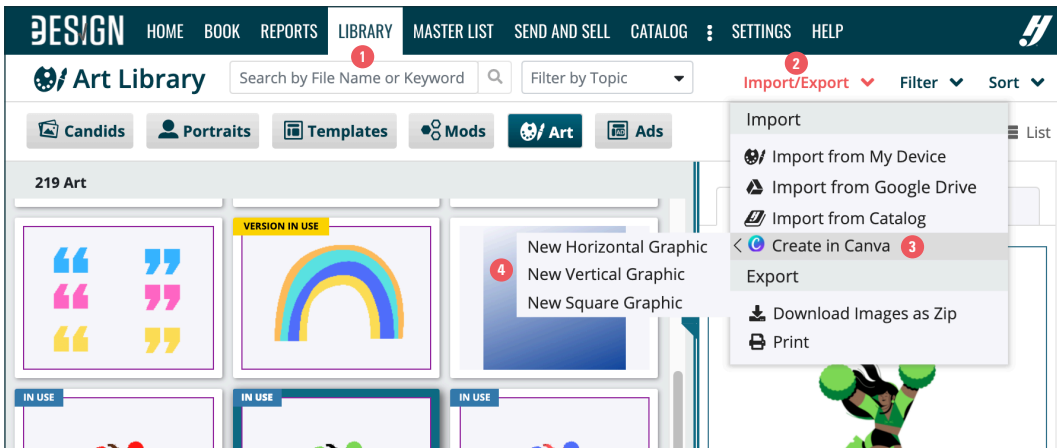

Next you can add **mods** to your library.

1. Click on the Mods tabs.
2. Click on a category you to view.
3. Click on mods you want to activate.
4. Click "Add to Library."
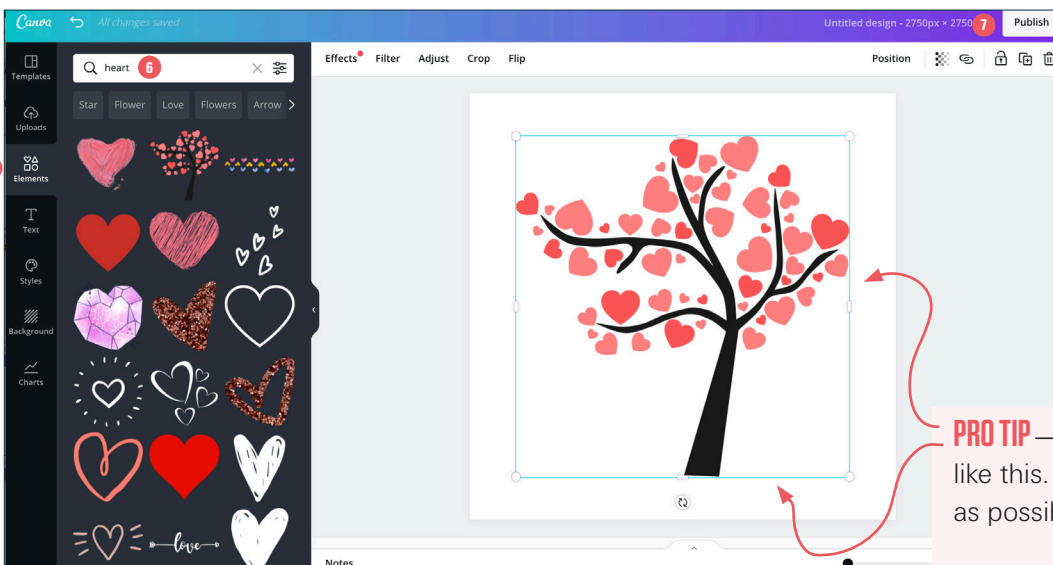5. Then they'll go to your Mod Library.

Next follow the same steps to add **art** to your Art Library. You can browse the tabs, or you can search for art by its name in the Graphics booklet.

GRAPHICS *collection*

HERFF JONES

JF0403

Catalog — jf040

Book Styles ⌄ | Templates ⌄ | Art ⌄ | Mods ⌄

Text : jf040 ✕

| JF0401 | JF0402 | JF0403 |
| JF0406 | JF0407 | JF0408 |

View All	View All	View All
Backgrounds and Borders	**Design Styles**	**Graphics**
Backgrounds	Acute	Just For Fun
Border and Backgrounds	Adventure	Mascots
Borders	All Together	Traditional
Cover Backgrounds	Aloft	
	Arcade	
	Argyle	
	Art Project	
	Balloon	
	Bees	
	Block	
	Butterfly	
	Callisto	
	Candy	

If you don't find artwork that you need, you can search for it in Canva!

HOME | BOOK | REPORTS | LIBRARY | MASTER LIST | SEND AND SELL | CATALOG | SETTINGS | HELP

Art Library — Search by File Name or Keyword | Filter by Topic | Import/Export ⌄ | Filter ⌄ | Sort ⌄

Candids | Portraits | Templates | Mods | Art | Ads

219 Art

VERSION IN USE

Import
- Import from My Device
- Import from Google Drive
- Import from Catalog
- ◀ Create in Canva ③

New Horizontal Graphic
New Vertical Graphic
New Square Graphic

Export
- Download Images as Zip
- Print

IN USE | IN USE | IN USE

① Go to the Library.

② Click on Import/Export.

③ Choose "Create in Canva."

④ Choose a horizontal, vertical or square canvas.

Canva — All changes saved — Untitled design - 2750px × 2750 ⑦ Publish

Effects | Filter | Adjust | Crop | Flip — Position

heart ⑥

Star | Flower | Love | Flowers | Arrow ▸

⑤ In Canva, click on Elements on the left side.

⑥ Search for what you want.
- Edit it as you'd like.
- If you choose to use an Effect, make sure you click "Apply" or the change will not save.

⑦ Click "Publish." The new artwork will save in your Art Library.

PRO TIP — Don't leave a wide border like this. Instead, scale it to be as big as possible on the canvas.

eDESIGN

YBK FRESH BOOKLET

10 NEW BOOK STYLES FOR 2023!

We've loaded eDesign with new book styles. Check them out on pages 18-21 in the "YBK Fresh" booklet. You can access this online, too, at herff.ly/ybk-resources > THEN CLICK "DOWNLOADABLE KIT MATERIALS."

3. Activate fonts.

The next step is to the activate the fonts you want accessible to your staff on every page. If you activated a Book Style or added templates to your library, you can use the fonts as is or you can modify them. To view our collection of over 600 typefaces, look in your kit for the printed guides below. You can also them online at herff.ly/ybk-resources > THEN CLICK "DOWNLOADABLE KIT MATERIALS."
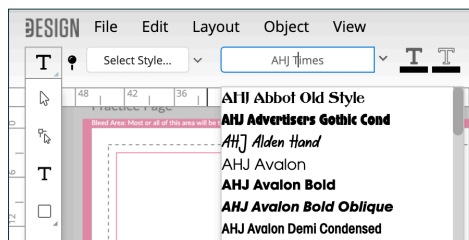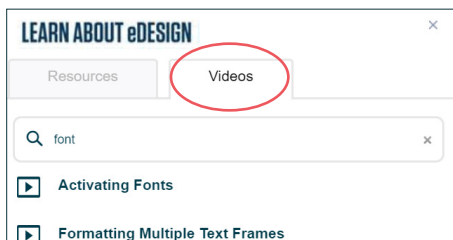
FONT COLLECTION BOOKLET

FONT POSTERS

If you would like to watch a tutorial on how to activate fonts, go to Help > Video Series > "Activating Fonts."

To view the fonts already activated in your book, open Practice Pages by going to Book > Edit > Practice Pages. Then click on the T-tool to activate the text formatting tools up top. Then click in the font menu. The font selection will open, and you can scroll down to see the fonts available on every page.

To activate fonts, go to **Settings > Design Styles > Fonts**. When you click on a font, eDesign will preview it in the window.
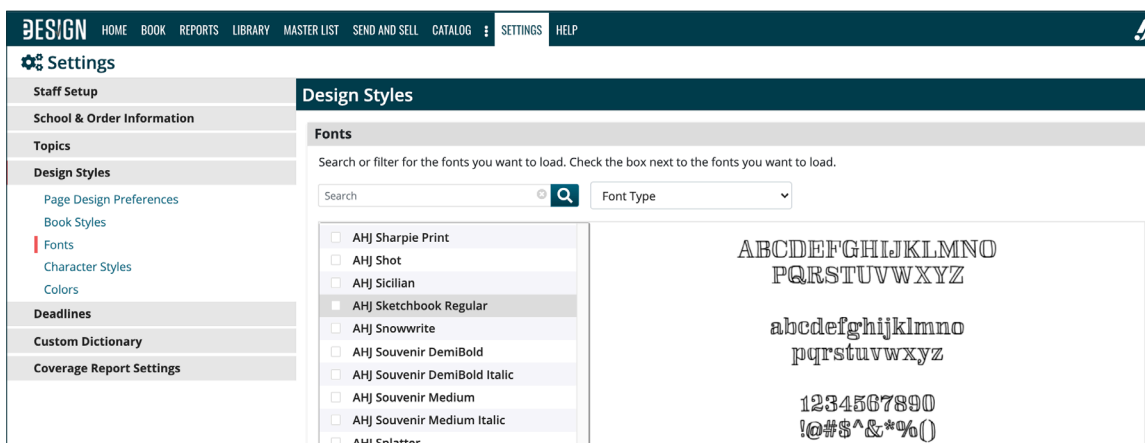
You can search for fonts by name (below at left) or you can filter the font list by the type of font (below at right filtered by "Script").
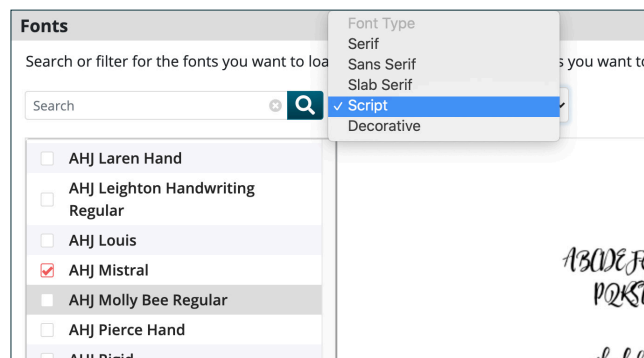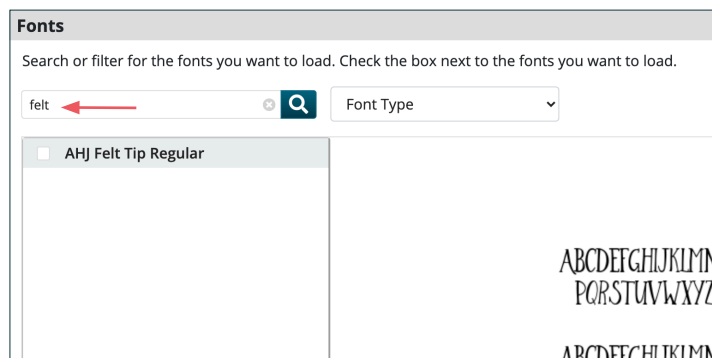
After you activate fonts, they'll be in Page Design ready for use. To quickly find a font, start typing its name in the font window.
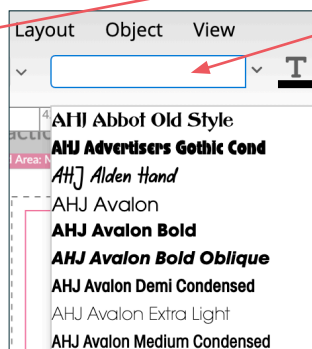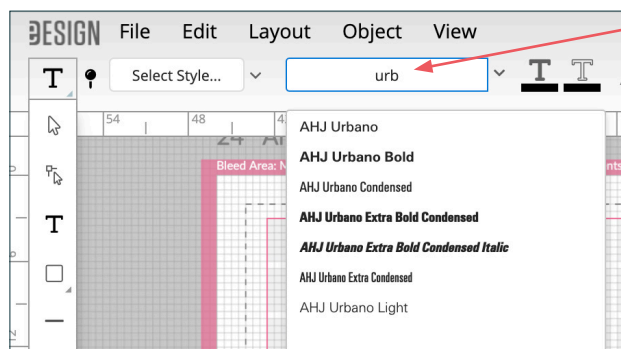
To clear a filter, back space to remove the text from the font window, and all fonts will appear.

DYNAMIC FILTERS SAVE TIME
To make it easy for you to find the font you want, the fonts will dynamically filter as you type.

4. Create colors.

Before you create colors, locate the printed color resources in your kit.
It's important to use our printed resources rather than rely on your monitor.

If you cannot find these in your kit, contact your CSA. Contact info is on eDesign's Home page in the lower left.

DOUBLE-SIDED COLORS POSTER

These colors are already in eDesign. You can activate any you like and give them custom names to make them fun and easy to find.

YBK FRESH

Check out the Book Looks in here. If you like how the colors look in print, you can activate them in eDesign and give them custom names.

You can use your school's official CMYK blends.

Ask a school administrator if they are able to provide you with the CMYK blends. Some schools have detailed brand guidelines like the one at right. Others may not be as detailed, but that's perfectly fine! All you need are the CMYK blends.

You can reference a professional swatch guide.

There are several reputable color swatch guides and books you can reference. Just make sure you use the CMYK values for **coated paper.**

There are two ways to create colors, using a color on a template and using a color swatch.

OPTION 1: Add Color from a Template – If you activated templates or mods in Catalog, the colors on those designs will be on the pages when you place the template or mod on those pages. However, since you might want to replace those colors, they are not added to your official selection of swatches. That makes it easy for you to distinguish between a color that was on a template from a color you've selected.

See how navy and turquoise from the template are NOT in the swatches?

THAT'S GOOD because it lets you quickly see the difference between a color you have created and one from a template you've imported.
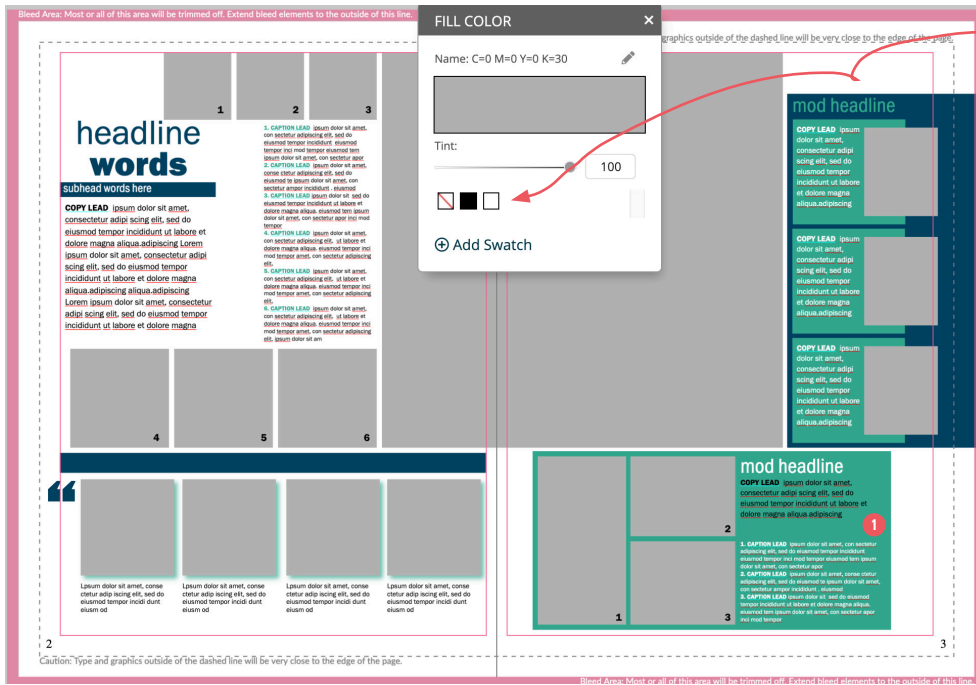
To add a color from a template to your swatches, do this while you are on the page.

1. First, put the template on the page and, with the arrow tool, click on an element that has the color you want to add.
2. Click on the Fill Color icon in the Control Panel up top.
3. Click Add Swatch in the Fill Color modal that opens up.
4. Optional - Give it a custom name (or keep its name from the template).
5. Click the Add Swatch button to save it.

Add New Color Swatch

Cyan: 80 %
Magenta: 0 %
Yellow: 40 %
Black: 0 %

We Are Turquoise ④
C=80 M=0 Y=40 K=0

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.

Cancel   Add Swatch ⑤
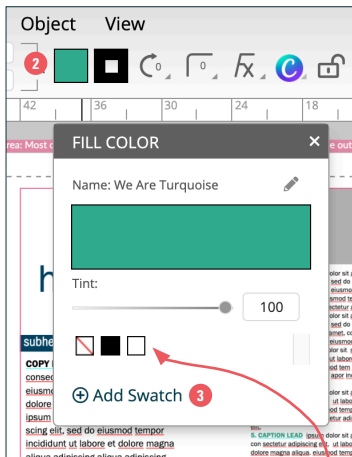
Before you add it.
When you select an element with a color in it, eDesign puts that color in the Fill Color box, but it won't be in the approved line-up of swatches until it is added as an official color.
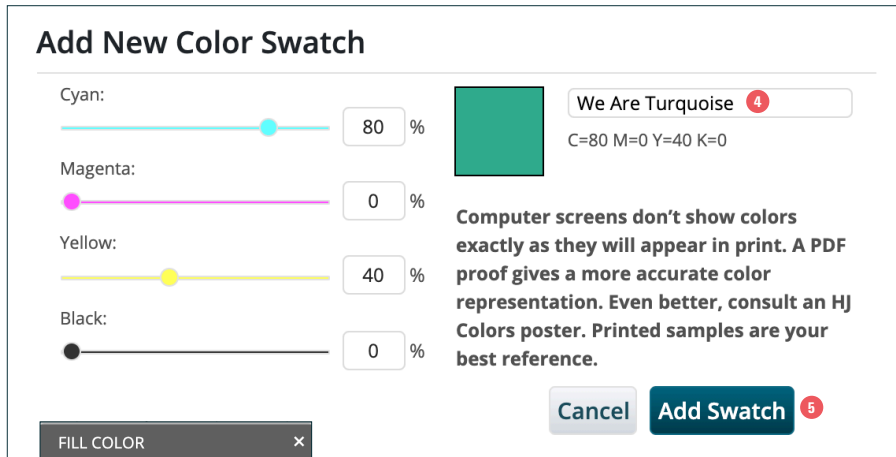
After you add it.
After you add it, the color will show up in your line-up of approved swatches and will be available on all pages.

OPTION 2: Creating Colors from a Printed Swatch

When you want to create your own colors, first find the CMYK blend on the printed swatch guide.

SOUTH DADE SENIOR HS • SOUTHERNAIRE • HOMESTEAD, FL

C.4 M.9 Y.1 K.0	C.31 M.9 Y.18 K.0	C.10 M.3 Y.24 K.0
C.23 M.87 Y.0 K.0	C.100 M.0 Y.49 K.20	C.22 M.0 Y.90 K.0
C.16 M.97 Y.89 K.0	C.95 M.75 Y.45 K.33	C.70 M.0 Y.100 K.0

Let's say you want to use the green below from the Colors Poster.

First, note its CMYK blend:

Cyan = 70
Magenta = 0
Yellow = 100
blac**K** = 0

Select or add colors to use in your book.

To create a color in Settings follow the steps itemized at right:

1. Go to Settings.
2. Click on Styles.
3. Click on Colors.
4. Click the "Add" button.

Add New Color Swatch

CYAN — 70 %

MAGENTA — 0 %

YELLOW — 100 %

BLACK — 0 %

Kermit the Frog Green
C=70 M=0 Y=100 K=0

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.

Cancel | Add Color

5. Enter the CMYK values from the swatch.
6. Give it a custom name if you want.
7. Click "Add Color to save it.
8. eDesign will add it to your swatches

---

8 Activated	Swatch Name	Swatch Name: Kermit the Frog Green
☐	C=49 M=0 Y=71 K=0	
☑	Kermit the Frog Green	C=70 M=0 Y=100 K=0
☑	People Green	Every student deserves to be remembered. At your hands history is made.
☐	C=85 M=15 Y=100 K=2	
☐	C=32 M=3 Y=26 K=0	
☐	C=99 M=17 Y=68 K=36	C=70 M=0 Y=100 K=0
☐	C=100 M=46 Y=98 K=12	Every student deserves to be remembered. At your hands history is made.
☐	C=31 M=9 Y=18 K=0	
☐	C=10 M=1 Y=4 K=0	
☐	C=100 M=0 Y=49 K=20	
☐	C=71 M=0 Y=27 K=0	

YOU CAN ALSO CREATE COLORS WHILE WORKING ON A PAGE.

To add a color while on a page, follow the same steps as shown on the previous page.

1. Click on the Fill Color icon in the Control Panel up top.
2. Click Add Swatch in the modal that opens.
3. Give it a custom name.
4. Click the Add Swatch button.

To reference a guide, search the Help menu for **"Creating Colors while Working on a Page."**

5. Create character styles.

This is optional but helpful. Its purpose is to promote efficiency and consistency. If you want to watch this in a video, go to eDesign's Help menu and search for "Creating Character Styles."

A character style is a collection of character formatting attributes that can be applied to text in a single click (font, size, fill color, stroke color, leading, kerning, and alignment). When you create a character style, you can apply that style to text in one click.

THIS STEP IS OPTIONAL.
Feel free to skip ahead!

Here's are the steps to **create** a character style:

1. Open Practice Pages or an empty spread.

2. Play with various text formats to create samples of what you want in your book like Headlines, Subheadlines, Copy, Captions, Bylines, etc.

   Are You Using Templates from the Catalog? — If you have activated templates from the Catalog, put one of those templates on the spread and modify the text formatting as you wish. Then you can create character styles with those attributes, which will help you customize the other templates and mods in that collection.

3. Take notes of the character styles you want to create.

   TIME-SAVING TIP — OPEN SETTINGS IN A NEW TAB
   One efficient way to work in eDesign is to have it open in multiple browser tabs. For example, to create character styles, you could have two browser tabs open:

   • The spread where you've created text formats to reference for making character styles

   • Settings where you create character styles.

   To open Settings in another tab, simply right-click on Settings and choose "Open in New Tab." Then you can bounce between tabs to multitask.
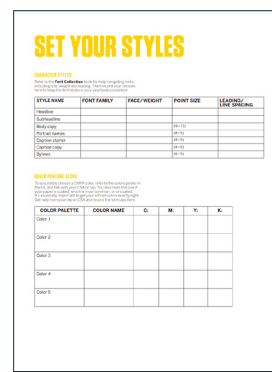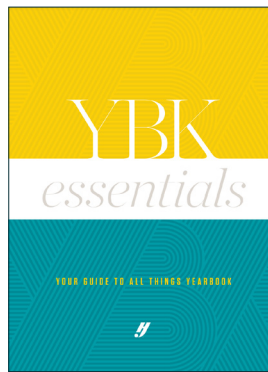
Look in your kit for "YBK Essentials." There's a handy chart near the back for documenting character styles.

4. When you are ready, go to Settings > Design Styles > Character Styles.
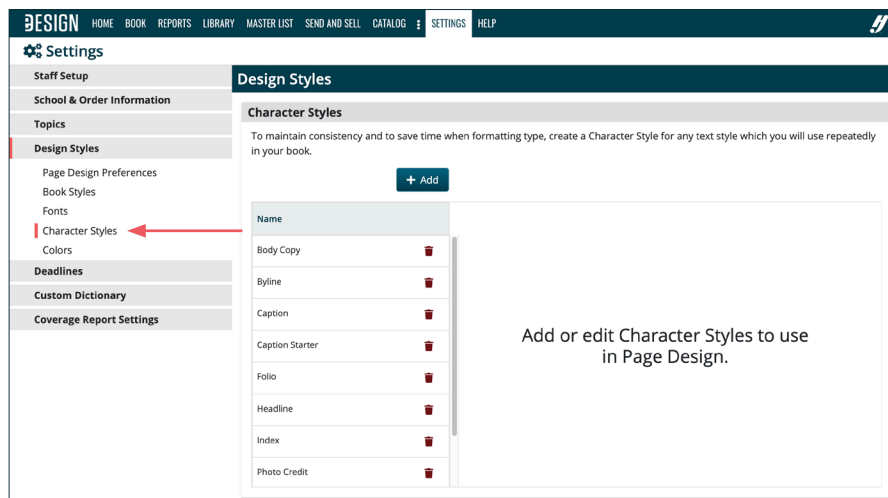
When the window opens, you'll see there are several "starter styles" to give you a head start. These are all editable. You can change their names and their settings in any way you'd like. The next steps shows how you can edit them.

MULTIPLE WAYS TO EFFICIENTLY FORMAT TEXT

In addition to character styles, there are other ways save time when formatting text.

1. Format text without highlighting it.
2. Format multiple text frames at one time.
3. Use Edit > Select All Text Frames.

To learn more, search eDesign Help for "**Formatting Text without Highlighting It.**"

1. To **EDIT** a character style:
   - Click on the name of the style.
   - When you do, it opens a dialog box. The name of the style and its settings will appear ready for you to edit. Change the name of the style as you wish and any of the settings.
   - Then click Appy Changes.
2. To **ADD** a character style, click on the Add button, and follow the same procedures above. You can create as many or as few as you'd like.
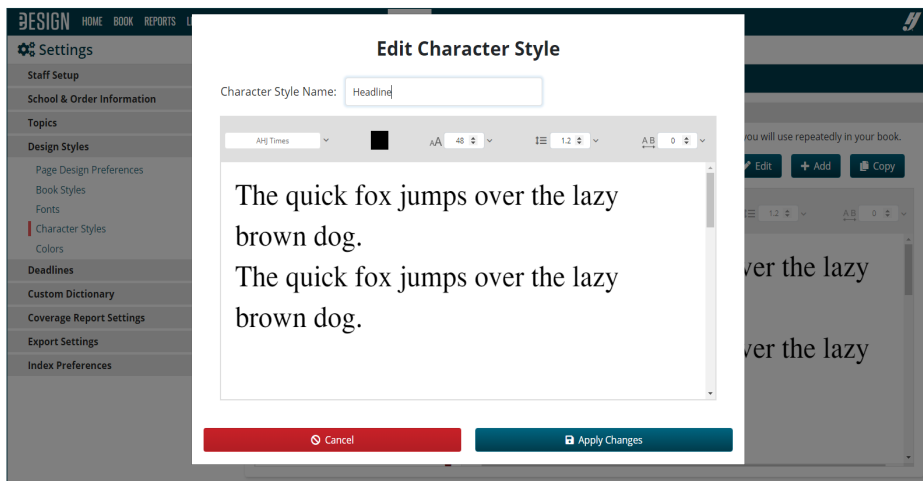
3. To **COPY** a character style, click on the name of the style you want to copy and then click the Copy button.

This duplicates the selected style and adds the word "(copy)" to the end of it.

You can edit the name to then call the character styles whatever you like, or make any minor adjustments as needed.
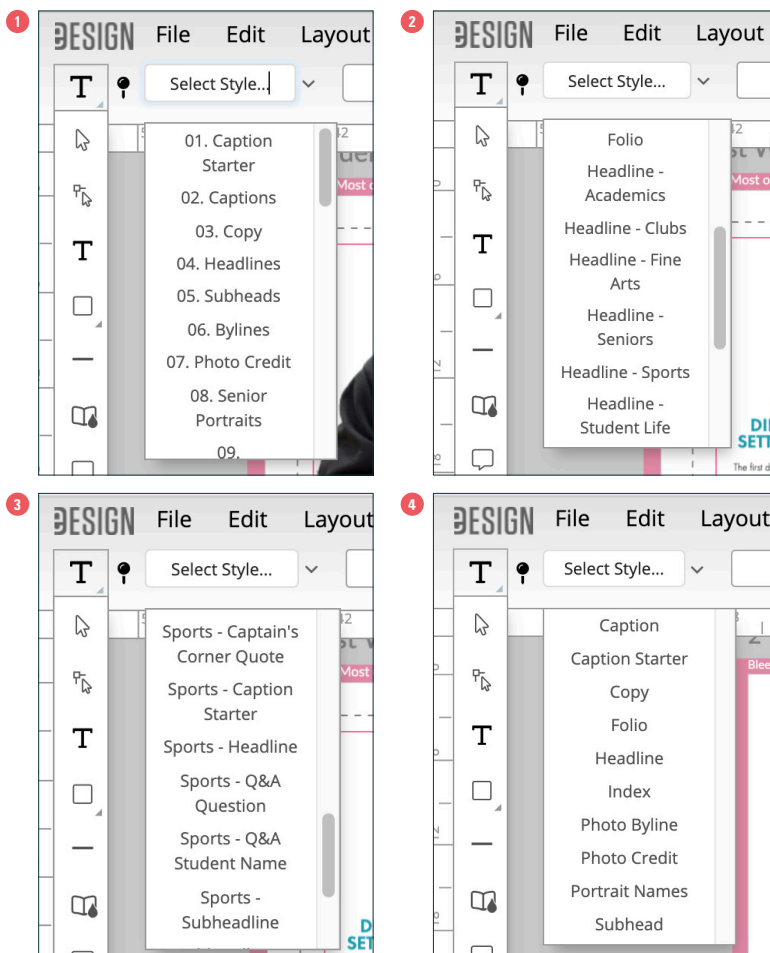
TIME-SAVING TIP — USE STRATEGIC NAMES

eDesign puts the Character Styles in alphabetical and numerical order. Give them names that work best for you:

1. NUMERATE THEM BY FREQUENCY OF USE
If you add numbers to their names, you can put them in order by frequency of use. Use double digits like 01, 02, and 03 in case you create more than nine.

2. SAY WHAT KIND OF TEXT IT IS
You can give them names that put its kind of text at the beginning so they'll be grouped in the list by headline, subheadline, mod, etc.

3. SAY WHAT SECTION IT'S FOR
If you change your styles based on their section in the book, start the names with the section to group them together.

4. KEEP THEM IN ALPHABETICAL ORDER
Let the alphabet speak for itself. You don't have to use a strategy.

6. Set your page design preferences.

You can modify your page design preferences at any time during the year as many times as you'd like. This is a good time in your set-up process to do it because by now you have worked on a page enough to have a general understanding of the design workspace. If you'd like to watch a tutorial on this, go to the Help menu, search for "Setting Page Design Preferences." Then go to Settings > Design Styles > Page Design Preferences.

To change a preference, click Edit in the lower right corner. Below is an explanation of the page design preferences you can adjust:

❶ PAGE MARGINS
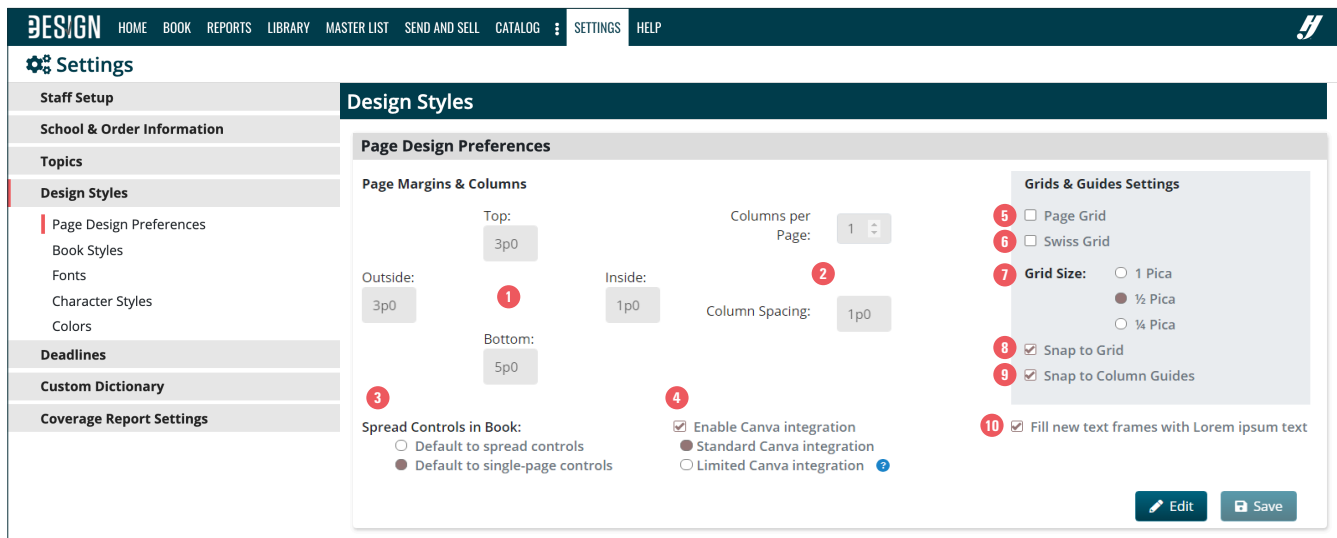Do not adjust the margins unless you have a very specific and well-planned reason for doing so. Before you change your margins, ask your CSA or rep. You can find contact information for your CSA and your rep on eDesign's Home page in the lower left corner.

❷ COLUMNS
eDesign is set to one column per page so there will be no column frames on your pages. If you want columns to appear on all pages, specify the settings here. You do have the ability to add columns on individual spreads. It's best to leave it set to one column unless you plan to use columnar design in your book.

❸ SPREAD CONTROLS
By default, eDesign is setup for single-page controls, but if you would rather work in spreads, you can change spread contols to have a single set of controls in the ladder for the two pages that make up a spread.

❹ CANVA INTEGRATION
By default, eDesign is integrated with Canva. Deselecting the box here will disable it so your users, including you, will not be able to access Canva via eDesign.

❺ PAGE GRID
By default, the page grid is turned off. If you like using a grid for precision, turn it on here for all spreads. You do have the ability to turn this on and off while working on a page as needed.

❻ SWISS GRID
By default, the Swiss grid is turned off. As it is with the page

grid, you can turn this on and off on individual spreads while you work. Turn the Swiss Grid on if you want to use our Square One resources to design pages or if you like to employ advanced grid design with rails of vertical and horizontal separation. You do have the ability to turn the Swiss grid on and off on the page while working.

❼ SELECTING THE GRID SIZE
The templates and mods in Catalog are built on a ½-pica grid. If you plan to use templates or mods in Catalog or if you plan to design on your own using the Swiss Grid, it is optimal to keep your grid at ½-pica.

❽ SNAP TO GRID
This is a helpful tool that helps you "snap" elements into alignment on the grid. You can turn this on and off while on a page. If you have disabled the page grid, turn this off so eDesign isn't trying to snap your elements to a grid you cannot see. While working on a page, you have the ability to enable and disable this action as desired.

❾ SNAP TO COLUMN GUIDES
This is a helpful tool if you design with columns throughout your book. Turning them on here sets it as the default on every page, but you can turn this on and off as needed on a page while working.

❿ PLACEHOLDER TEXT
By default, when you draw a text frame on a page, eDesign will fill it with placeholder text called Lorem Ipsum. Without it, the text frame will be invisible when you click off the text frame.

7. Customize your folio.

You don't have to complete this step right away, **but the folio layer locks after you submit a page, so you must finish formatting it before you submit a page**. Let's start with a little background info. The folio is the page number and any text you want to go with it. eDesign automatically puts a page number on each page. You can format the text and move it anywhere on the page.
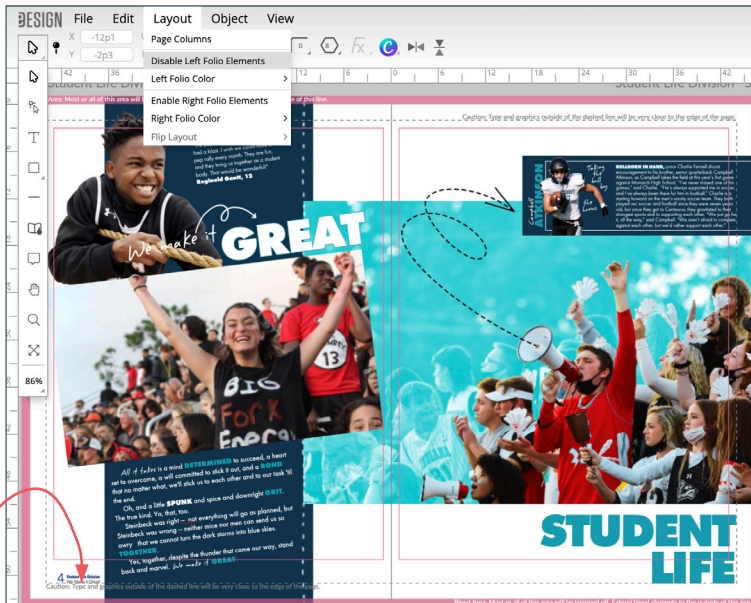
The left folio is here. On this spread, the right folio has been disabled so it won't interfere with the headline.

You can set it to print only on the left, only on the right, or on both, and when on a page, you can disable it on that page if needed.

You can also add the Topic and Section from the ladder if you wish, and you can format the text and their position. If you add it to the folio, eDesign will auto-populate that info to each page.

For example, if this is the ladder info for pages 142,

TOPIC
Varsity Boys Basketball

SECTION
ATHLETICS - Going for Gold

then you can include the info from the ladder with the page number, and you can set it up to look something like this:

142 Varsity Boys Basketball
ATHLETICS - Going for Gold

FOLIO FACTS TO NOTE

WHEN CREATING YOUR FOLIO

THE FOLIO IS ALWAYS ON TOP
The folio will always be on top of everything on a page, including the background. Because the folio layer is always on top, don't put a background on the folio layer because it will cover up everything on the page.

YOU CAN DISABLE THE FOLIO ON PAGES
You can turn off the folio layer on individual pages if it interferes with the design.

THE FOLIO TEXT CAN TOGGLE BETWEEN DEFAULT, WHITE AND BLACK
When on a page, you can change the auto-populated text to black or white, but keep in mind that only the auto-populated text from the ladder will change color, not any supplemental graphics or text you add.

IF YOU WANT AN ELEMENT YOU CAN MODIFY ON THE PAGE, DON'T PUT IT ON THE FOLIO LAYER
If you want to add lines, graphics, or text to the folio design that you want to change in color or content while working on pages, don't include it on the folio layer. Instead, open a blank page and add it there, lock them and save it as a template. That way you'll be able to drag/drop it onto each spread and it will land locked in the correct position where you can change its color or content as needed right on the page.If you know you want multiple versions for a color change from section to section, then you can save multiple templates.

WHEN ADDING TOPICS OR SECTIONS

ALL CAPS AND ALL LOWERCASE IS SET IN THE TOPIC AND SECTION FIELDS ON THE LADDER
If you want the topic or section to be all caps or lowercase on the page in the folio, you'll need to edit it on the ladder to be all caps or all lowercase.
See page 10 for examples.

EDIT THE FOLIO TEXT ON THE LADDER
While working on a page, if you discover the folio text needs to be modified, you would need to edit the topic and section fields on the ladder. Since the text is auto-populated from the ladder, you won't be able to edit the folio's text on a page.

LENGTHEN AND WIDEN THE TEXT FRAMES
Make sure the text frames on the folio layer for the Page Number, Topic and Section on the folio layer are long enough and tall enough to accommodate the text. When it doubt, stretch it out on the folio layer so the page numbers, topics and sections will not be cut off by over-set text. After you create your folio, go to a page with a long section and topic (or create fake ones so that you can test it). If the text is cut off, go back to the folio layer and lengthen the text frames so they can accommodate the long Topics and Sections. Likewise, make sure the text frames are tall enough to include the full word so none of the letters are shaved off along the bottom. You must make all folio changes before you submit a page when the folio layer becomes locked.

BEFORE YOU SUBMIT PAGES

FINALIZE THE FOLIO BEFORE YOU SUBMIT A PAGE
If this isn't a good time for you to customize your folio, you can do it later, but after you submit a page, the folio layer will become locked. You must finalize the folio's design before you submit any pages. — *Submitting the cover/endsheets in eDesign will not lock the folio layer.*

REVIEW AND EDIT THE TOPIC/SECTION FIELDS BEFORE YOU SUBMIT THE PAGE
Even though the folio layer becomes locked when you submit a page, you can still modify each page's Topic and Section fields on the ladder until you submit it. When you submit a page, that page's Topic and Section fields will lock, so make sure you proofread the folio before you submit a page.

WANT TO SEE EXAMPLES?

The list at left is for your quick review. If you'd like to see visuals or dig deeper into pro-tips for maximizing your folio, search eDesign Help *"Customizing Your Folio."*

Now that you know how the folio works, you can create yours. If you'd like to watch a tutorial, search for "Customize Your Folio" in the Help menu.

Go to **Book > Edit > Folio**.
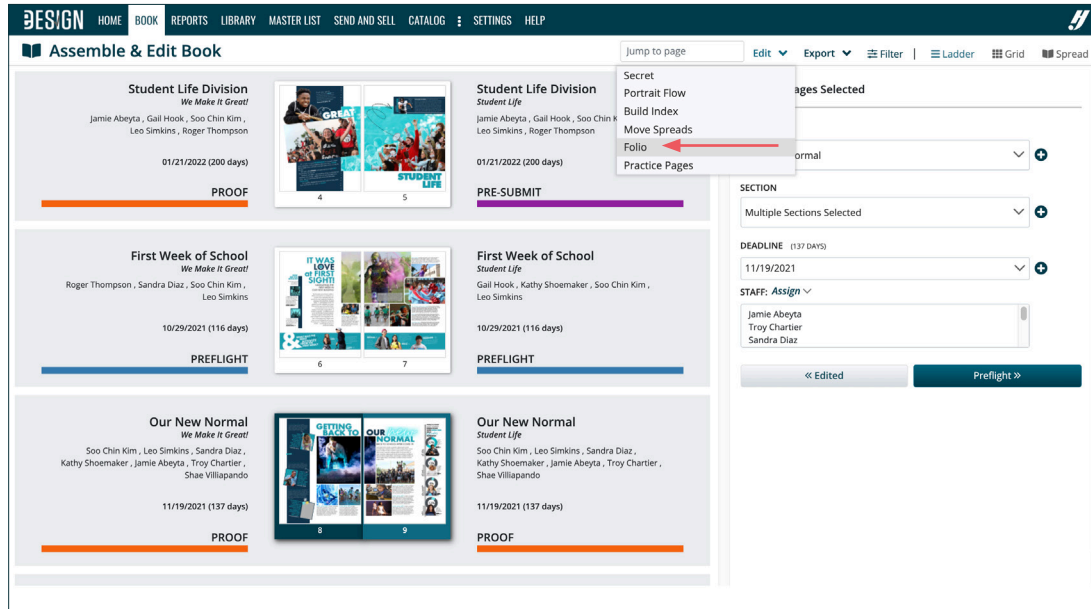
This will open the folio layer, which looks like a blank template except the page numbers are hash symbols (###). The ### is placeholder text for page number. eDesign will auto-populate the page number on pages in that field on each page. By default, eDesign puts placeholder text for the page number on the folio layer.
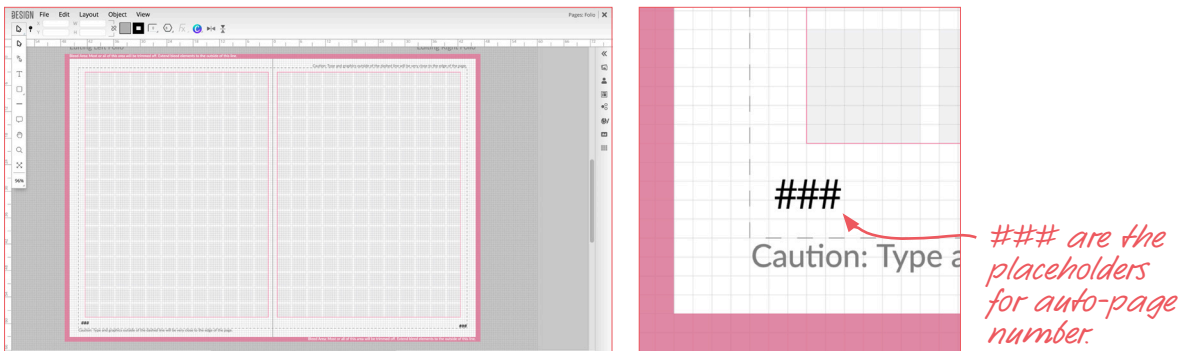

are the placeholders for auto-page number.

In the Layout menu, you can turn the page number off or on for one page or both pages. You can also turn on/off their Topics and Sections. If you want to add Topics and Sections to your folio design, turn them on here.
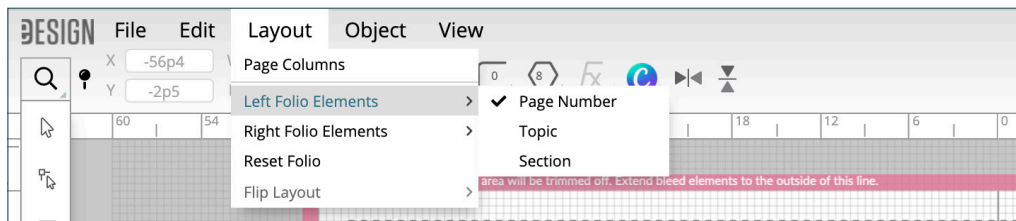
If you turn on topics and sections, their placeholder text frames will pop on screen at the bottom of the page like this:
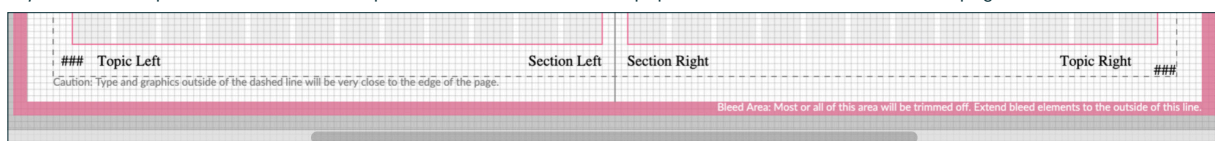
Next, format the page number. *See sidebar at right.*
- Click on one of the ### text frames and zoom in.
- Click on the T-tool to turn on the text formatting controls up top.
- Format its font, size, color, kerning and/or alignment as you'd like.
- Then position it where you want inside the dashed margin lines.

If you enabled Topics and/or Sections, the next step is to format them. (Click on the text frame. Click on the T tool. Format the text frame. Position it on the p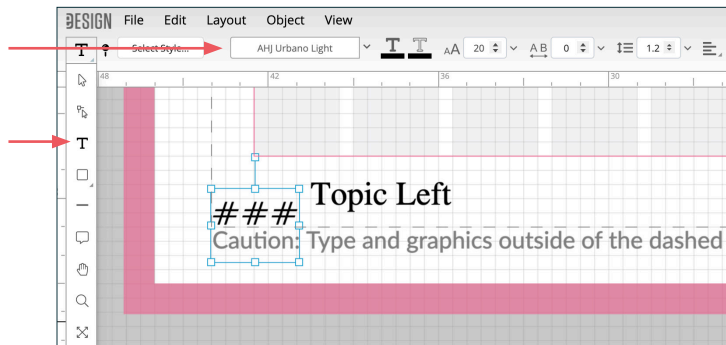age. *Lengthening the text frames as shown below is needed when you have lengthy topics and sections. They need to be long enough to fit your longest text.*

Once you format it, preview it on real pages. Placeholder frames won't show how it look on pages. *(The image below shows how the folio above looks on a real page.)* Check it on pages at the beginning and end of your book to ensure the position and alignment looks good on page numbers with one, two and three digits. See below for how to preview it by working in multiple tabs.
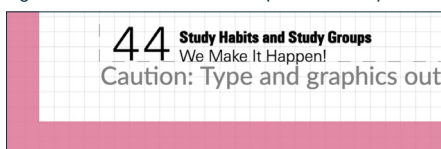
The last step is to format the folio on the other page if you want the folio on both pages. Turn on the document grid in the View menu and use the align tools.

AN EFFICIENT WAY TO PREVIEW THE FOLIO — WORK IN MULTIPLE TABS

1. Go to File > Save. Leave the folio.
2. Go to Book. Right click on the Book tab and choose "Open Link in New Tab."
3. Open a page near the back of your book and zoom in on the folio to see how it looks.
4. Click back over to the other tab. Open the folio layer and adjust the text formatting and position as needed.
5. When you are ready to preview your changes, go to File > Save. You won't see the changes until you save it.
6. Then click on the other tab. You won't see the changes because it needs to be refreshed, so open the mini-ladder in the Preview Panel on the right. Then click to open the next or previous page.
7. When that page opens, you'll see the folio in its new format.
8. Click back over to the folio tab to edit it further. Save it.
9. Click on the other tab to preview your changes. Make sure you always open a new spread in the mini-ladder each time so the folio will be updated.
10. Then repeat the process until you have it perfected.

8. Create your templates and mods.

The last step is to begin the fun work of creating the design of your pages. If you would like to learn efficient and creative ways to work, go to eDesign Help and search for "Creating Templates and Mods." You'll find a video as well as a detailed PDF guide with visuals and instructions.

This guide covers the following topics that help you maximize and strategize:

- Formatting Text without Highlighting It
- Formatting Multiple Text Frames at One Time
- Using the Select All Options
- Removing images from Frames
- Restoring Past Spreads with Spread History
- Flipping Layouts and Mods
- Grouping, Aligning and Applying Spacing
- Using "Select All Text" to Customize Mods and Templates from Catalog
- Making Quick Copies
- Saving Individual Elements into the Mod Library

That's it! Great work! You're ready to roll! Have a great year!

Happy Yearbooking!

OTHER GUIDES REFERENCED IN THIS DOCUMENT

Where applicable, the following documents have been referenced in this start-up guide. You can search eDesign Help to find these guides to help you strategize and maximize your work as you set up eDesign and get ready for a fantastic year.

CREATING TOPICS WITH THE FOLIO IN MIND

ASSIGNING STAFF TO PAGES FROM THE START

FILTERING THE LADDER BY STATUS, STAFF & DEADLINE

MOVING SPREADS ON THE LADDER

FORMATING TEXT WITHOUT HIGHLIGHTING IT

CUSTOMIZING YOUR FOLIO - TIPS & TRICKS

PLANNING STRATEGIC DEADLINES LIKE A PRO

CREATING COLORS WHILE WORKING ON A PAGE

CREATING TEMPLATES & MODS — TIPS & TRICKS

PRO TIPS TO **STRATEGIZE** & **MAXIMIZE** IN eDESIGN

Once you have eDesign all set-up, you can experience the fun of creating designs for your book. First, you can watch the tutorial "Creating Templates and Mods." Then you can enjoy the work of customizing templates and mods you activated in Catalog and designing layouts and mods from scratch. The next few pages share tips to help you work efficiently and creatively.

FORMATTING TEXT WITHOUT HIGHLIGHTING IT and FORMATTING MULTIPLE TEXT FRAMES AT ONE TIME

A very quick way to format text is to select multiple text frames to change their text format all at the same time.

1. Holding down the Shift key allows you to select multiple text frames.
2. Then click once on the T-tool to activate the text formatting features up top in the Control Panel.
3. You can then apply a character style and/or any of the text formats without having to highlight text in a frame or do it frame by frame.
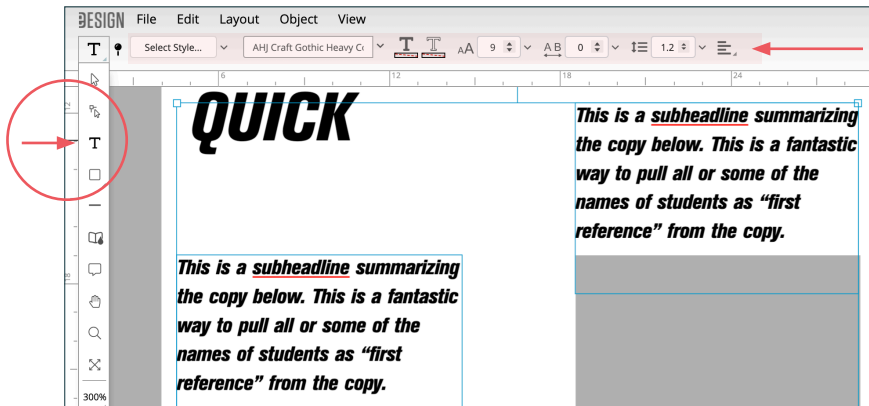
See how both text frames are selected?
The blue lines around the text frames tell you that both are selected. That means when changes are made up top in the Control Panel, the text in both selected frames will change at the same time.

4. You can also go to File > Select All Text on Spread if you want to modify all the text frames at one time.
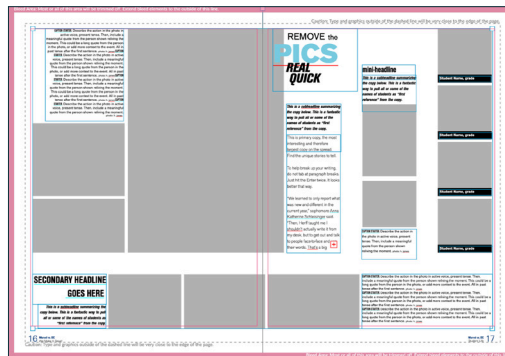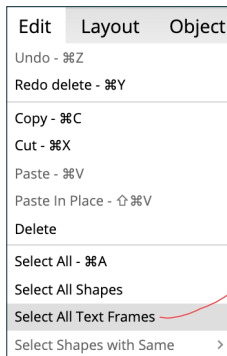
You can deselect something you don't want to change
To deselect a text frame, hold down the Shift key and click on the element you want to deselect.

USING THE SELECT ALL OPTIONS

In addition to selecting all text on a spread, eDesign has several other Select All functions that may be helpful to you.
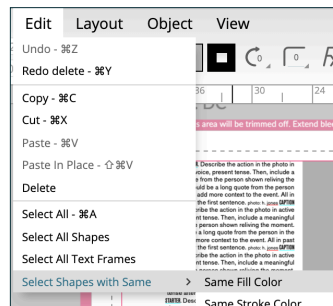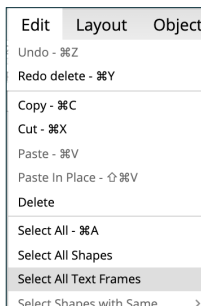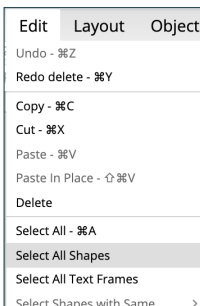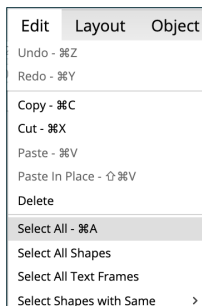
A great way to use this is to select a shape with a color you'd like to change and then choose "Select All Shapes with Same > Fill Color. Doing so will select all shapes in that color so you can change their color at the same time. To enable this option, you first need to select a shape on the spread.

ƎDESIGN

REMOVING IMAGES FROM FRAMES

When you want to remove images from a layout so you can save it as a template, go to Object > Remove All Images.
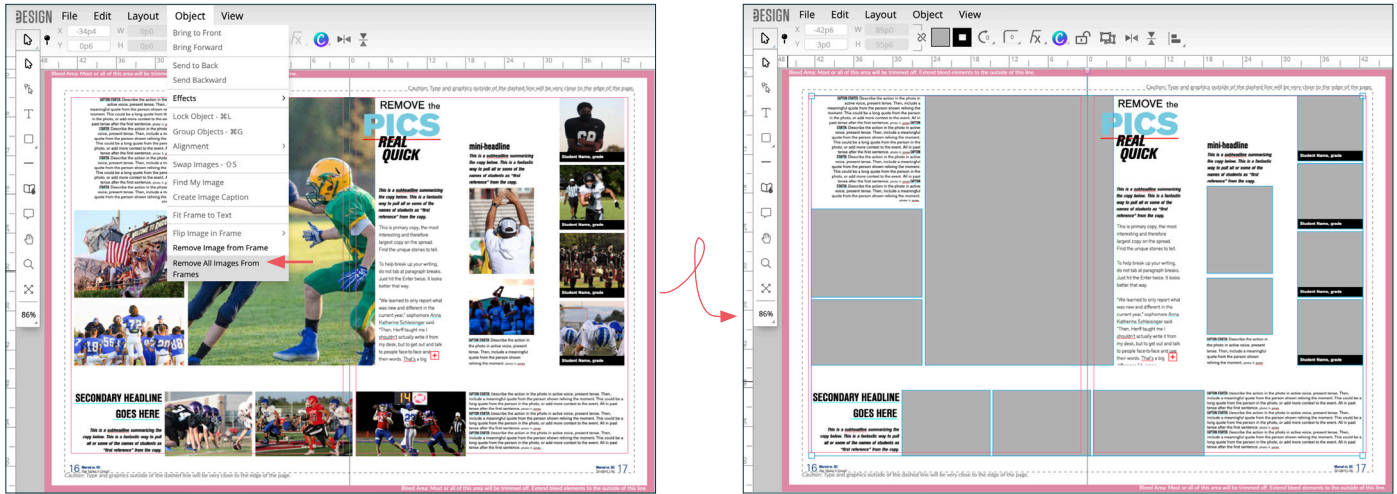
When you want to remove images from only a few frames, use the Shift key to select multiple text frames, and then go to Object > Remove Images.
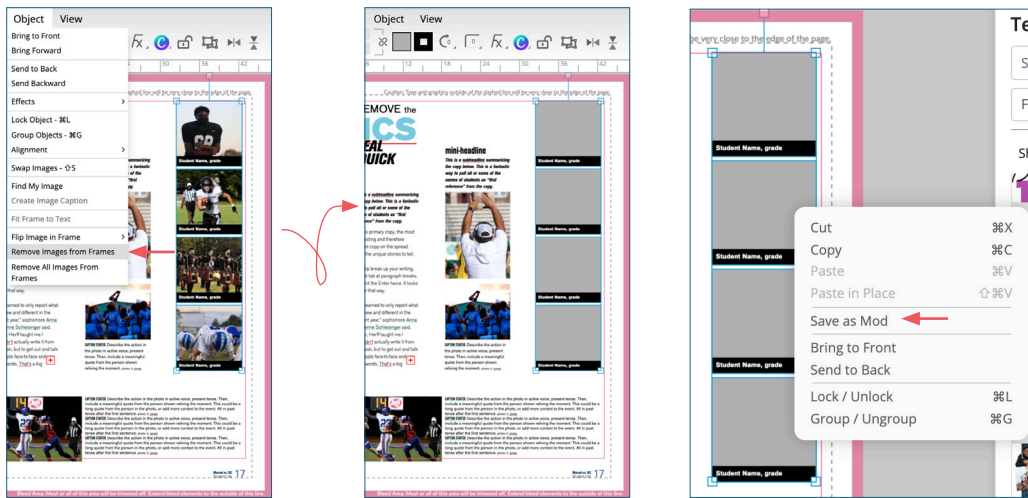
You could then right click on it and save it as a mod without the pics.

RESTORING PAST SPREADS WITH SPREAD HISTORY

When designing layouts, you can explore possibilities on real pages knowing you can restore all previously saved versions of the spread.
Go to File > Spread History to see all previously saved versions. Click on the version you want to bring back, and eDesign will pop it on the page.
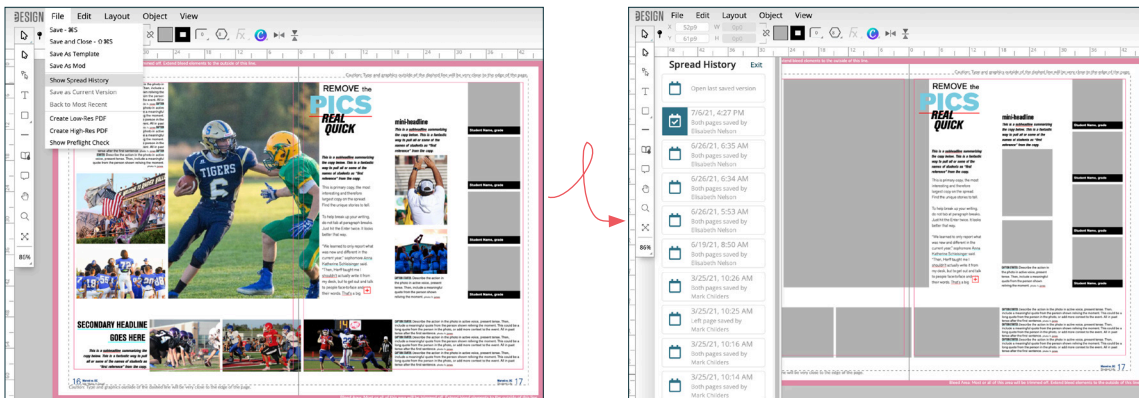
What does eDesign save in Spread History? Spread History stores all versions when a user saves work when leaving a spread or when the user goes to File > Save.

eDESIGN

FLIPPING LAYOUTS AND MODS

eDesign has the power to flip layouts and mods for you without flipping the orientation of the images and text.

1. After you create a layout you'd like to flip, first select everything on the spread by going to Edit > Select All.

2. Then go to Layout > Flip Layout > and choose the way you want to flip it – Horizontal, Vertical, or Both.
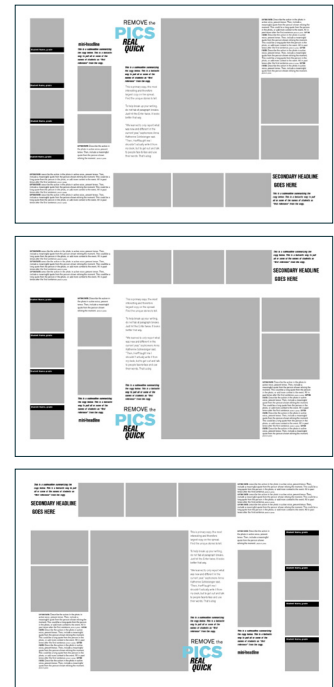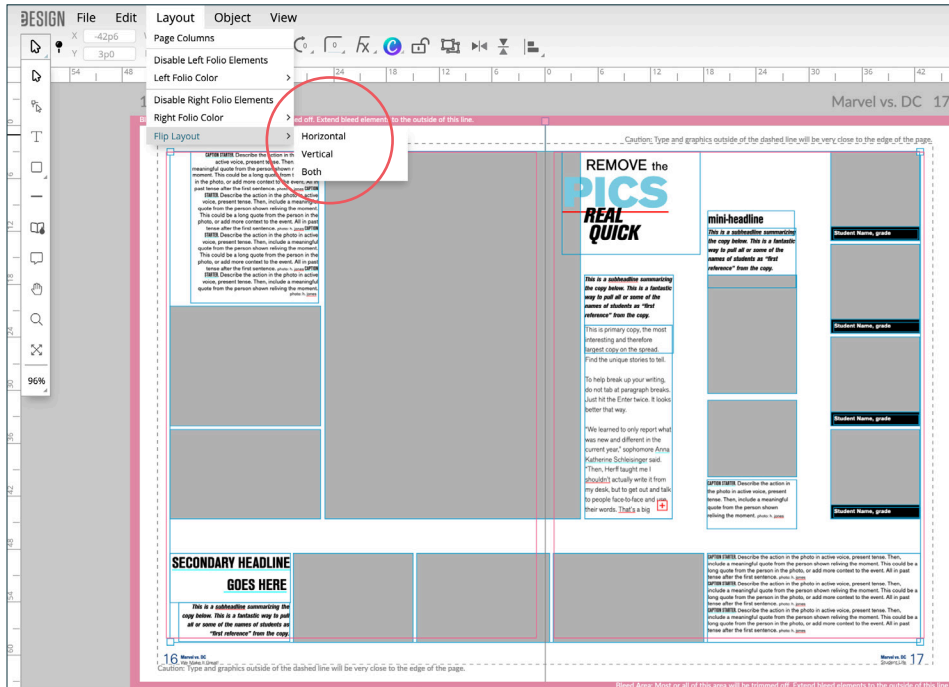
3. You may need to make a few adjustments to the placement of elements or to text alignment, but you'll quickly be able to turn one layout into four.

4. You can also flip a selection of elements on a page rather than an entire layout. To do that, first select the elements you want to flip. You can Shift-click to select multiple objects or you can marquee to select what you want.

5. With the elements selected, click on one of the Flip icons up top which will also flip elements without changing the orientation of images or text.
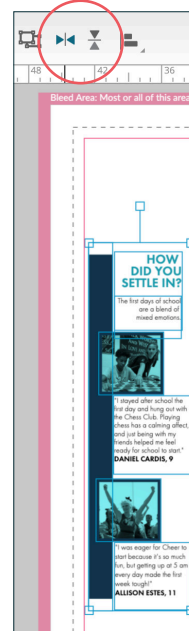
First select all the elements. Then click on one of the flipping options to quickly create multiple versions.
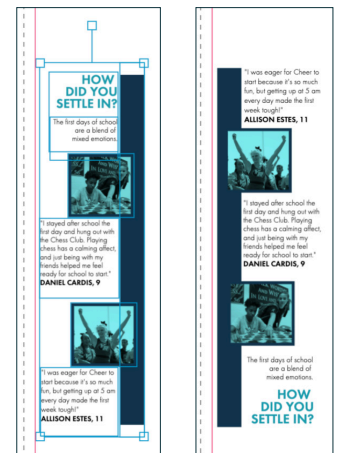
6. In this example, after you flip the elements once, you could adjust as needed, use the Remove Image function to remove both images at once, and then right-click to save it as a mod.

7. When you're finished building mods from the layout, you can go to Spread History to return the spread to its previous state.

ƎDESIGN

GROUPING, ALIGNING, AND APPLYING SPACING

As you design layouts and mods, keep in mind a few helpful tools:

1. **GROUPING** - When you group multiple elements, you can move them into position as one item. Simply select multiple elements and either right click to choose Group/Ungroup, use the keyboard shortcut Command/Control G, or go to Object > Group/Ungroup.
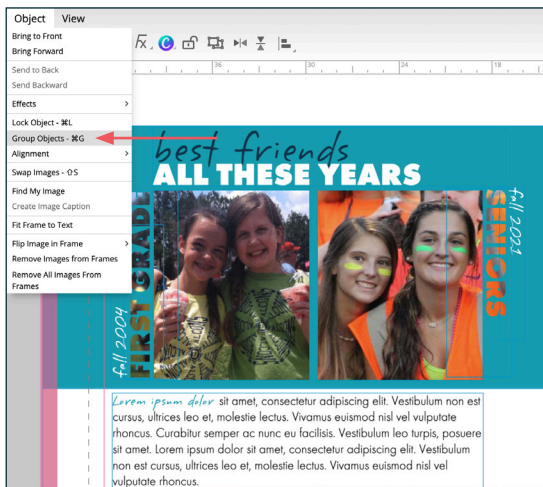
When an object is grouped, you are not able to edit the text, so you'll need to ungroup it when you want to edit text in a grouped element.

2. **ALIGNING** - When you use the Align tools on grouped elements, the group will maintain their respective positions and align as one entire unit. Simply select the grouped element and what you want to align, open the Arrange Panel, and select the alignment you want.
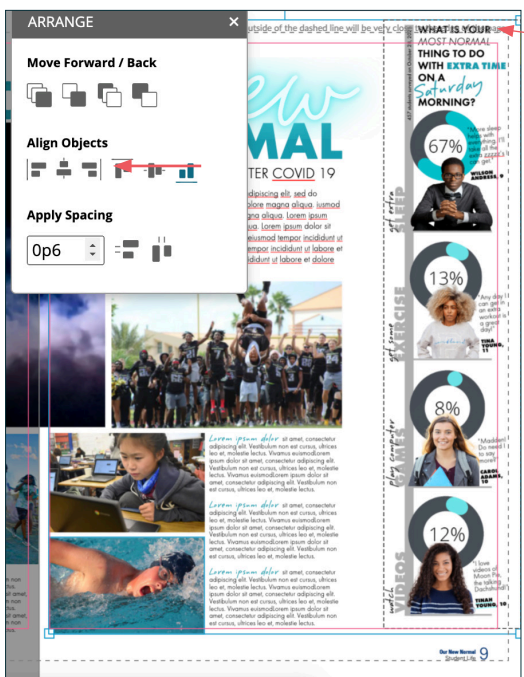
This grouped mod is up too high up and out of position.
After Shift-clicking to select both the mod and the swimmer's photo at the bottom of the page, it is easy to use the align tools to snap the mod down to align with the bottom of the swimmer's photo.

3. **APPLYING SPACING** - You can also use Apply Spacing to evenly distribute elements. The mod on the left doesn't have consistent internal spacing between images. By Shift-selecting them and using the Apply Spacing tool, they can all be precisely the same number of picas apart.
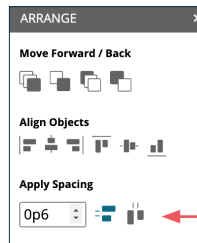
PRO TIP – If you work on a 1-pica grid, input a 1p0 here. If you work on a 1/2-pica grid, input 0p6. And if you work on a 1/4-pica grid, input 0p3.

TEMPLATES & MODS - TIPS & TRICKS / PAGE 4

DESIGN

© HERFF JONES YEARBOOKS

USING "SELECT ALL TEXT" TO CUSTOMIZE MODS AND TEMPLATES

The Catalog has a significant collection of mods and templates you can customize and use in your book. The mods are organized in collections to help you efficiently find the type of mod you need.
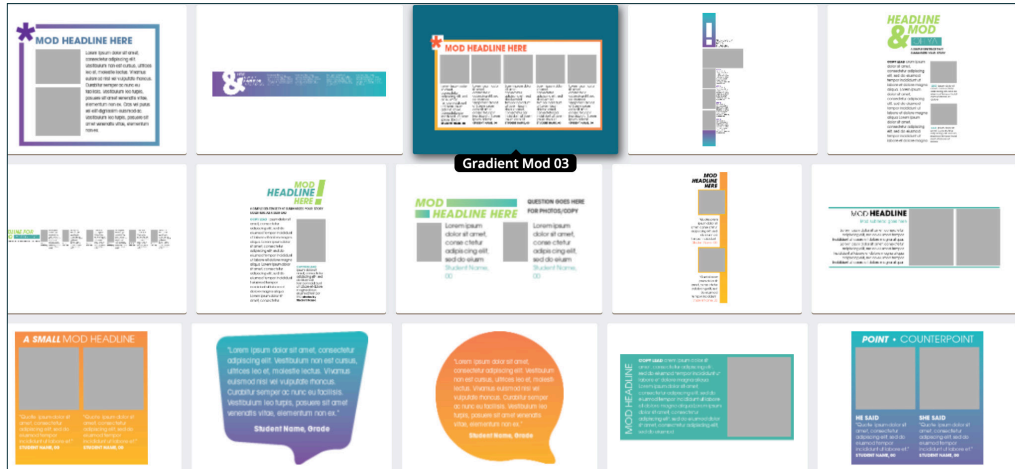
Some of the collections are decorative.
These coordinate with the collection of templates in Book Styles and GoDesign.
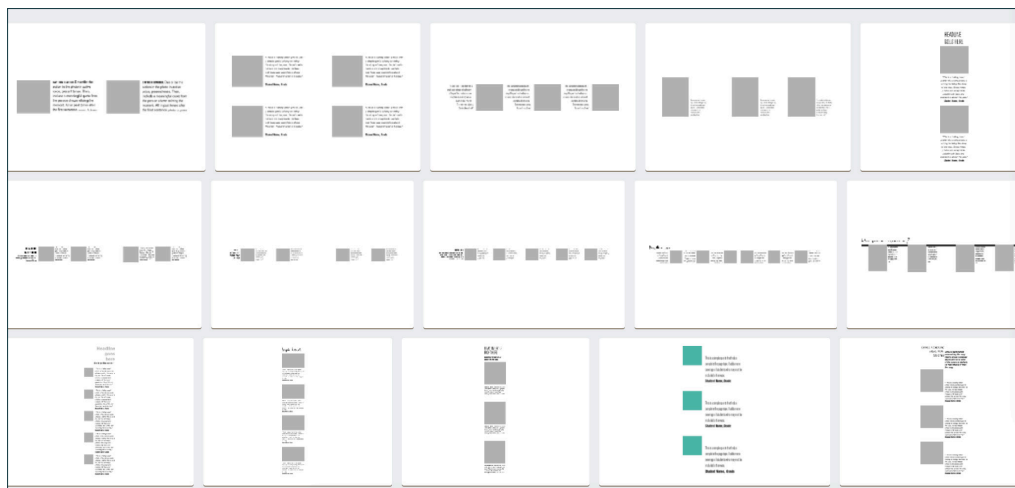
The Square One mods, on the other hand, are not decorative.
They are designed to be generic so that they can easily go with any book's design.

What makes the mod collection even more exciting is the "Select All Text" function that empowers you to quickly change the fonts on the spread.
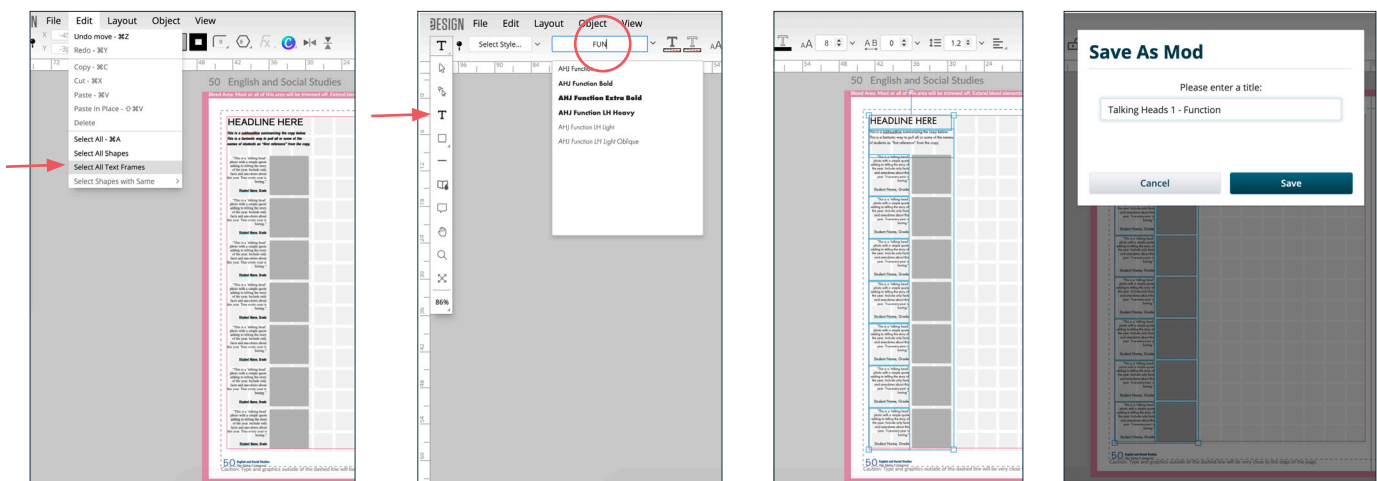
1. Place the mod on the page.
2. Go to File > Select All Text Frames.

3. Click on the T-tool.
4. Up top, select your font.

4. Adjust design if needed.
5. Select all the elements.

6. Go to File > Save as Mod.
7. Give it a name

MAKING QUICK COPIES

When you want to make a copy of an object in a flash, simply hold down the Alt/Option key and click/drag a copy onto the spread. In a matter of seconds you can create multiple versions of anything.

One text frame becomes seven.
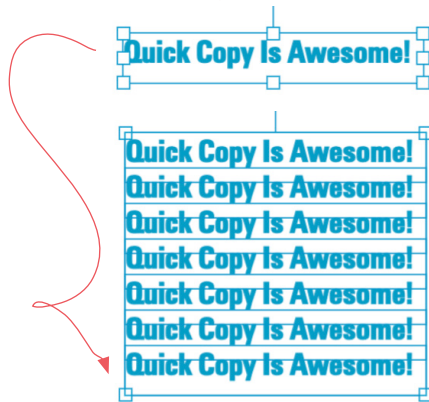
Eight custom shapes become 40.
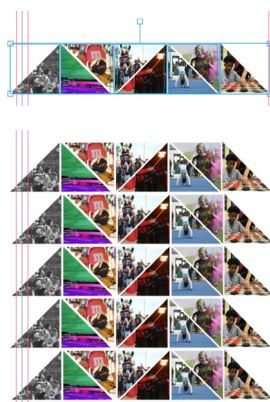
SAVING INDIVIDUAL ELEMENTS INTO THE MOD LIBRARY

Character styles are a huge time-saver — they are a great way to quickly format text frames — but another great method is to save an element into the mod library. When you create an element you'd like to use again on future spreads, click on the element and go to File > Save As Mod.

You can save anything as a mod, multiple elements or just one.
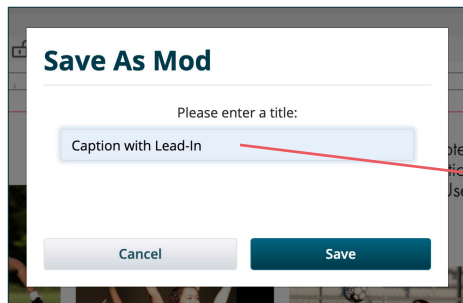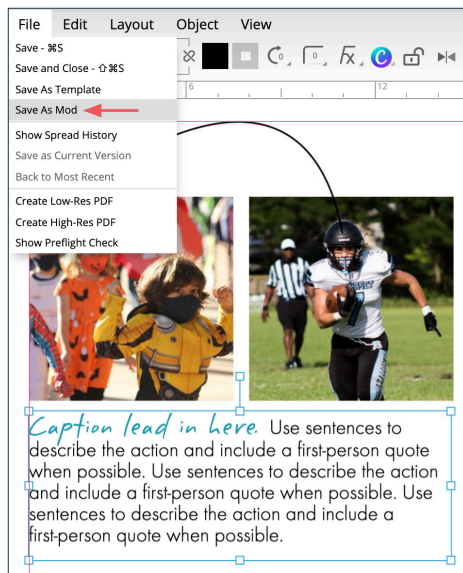
You can create an entire collection of mods to make it easy to design pages.

Save As Mod

Please enter a title:

Caption with Lead-In

Cancel   Save

Mods Library

Search by File Name or Keyword

Candids | Portraits | Templates | Mods | Art | Ads

35 Mods

FILE NAME:	**Quote Box**
DIMENSIONS:	**204 X 157**
FILES SIZE:	**4.77 KB**
UPLOADED BY:	**Elisabeth Nelson**
UPLOADED DATE:	**Tue Jul 6 2021**

YOU'RE TRUE
IT'S NICE TO HAVE A FRIEND

FILE NAME:	**Headline and Subheadline Package**
DIMENSIONS:	**73 X 280**
FILES SIZE:	**4.72 KB**
UPLOADED BY:	**Elisabeth Nelson**
UPLOADED DATE:	**Tue Jul 6 2021**

FILE NAME:	**Caption with Lead-In**
DIMENSIONS:	**57 X 161**
FILES SIZE:	**8.47 KB**
UPLOADED BY:	**Elisabeth Nelson**
UPLOADED DATE:	**Tue Jul 6 2021**

CREATING TOPICS WITH THE FOLIO IN MIND

PRO TIPS TO **STRATEGIZE** & **MAXIMIZE** IN eDESIGN

Understanding how eDesign's folio syncs with the topics and sections you apply to pages in the ladder may impact how you create your topics, so considering these possibilities before you type your topics can save you time and boost your creativity.

WHAT'S THE FOLIO? It's the page # and accompanying ladder info.

HOW DOES THE FOLIO RELATE TO PAGE TOPICS?

1. You can set up eDesign so that Topics and/or Sections from the ladder can auto-populate onto pages with the folio.

2. The topics can be applied to the ladder as page topics or as sections.

TWO POSSIBILITIES TO PONDER

1. **LOWERCASE AND UPPER CASE** – If you want the topic or section to be capitalized or all lowercase on the page, then when you enter them as topics, you'll need to type them that way. Either capitalize it or type it in lowercase. *Check out the examples at right.* You can edit the topics later (up until you submit a page that uses it), but taking time to think about it now can help you type them the way you want them from the start.

2. **SECTIONS IN FOLIO** - If you want to include the section in the folio, you can put the section by itself or you can include its thematic title. In the examples at right, the section is "Student Life" and the thematic title for Student Life for this example is "We Make It Great." See how these four examples include the section and the thematic title?

   Another option to consider is to put thematic titles on the even pages and sections on the odd pages, or vice versa. Check out this example:

THEMATIC TITLE ON EVEN PAGES / **SECTION ON ODD PAGES**

EXAMPLES TO HELP YOU DECIDE
These examples simply help you see how all caps and lowercase look in a folio. You'll design yours in Step 7.

FOLIOS WITH ONLY TOPICS

142 *Friday Night Lights*

142 *friday night lights*

142 **Friday Night Lights**

142 **friday night lights**

142 **FRIDAY NIGHT LIGHTS**

FOLIOS WITH TOPICS *AND* SECTIONS

142 *Friday Night Lights* **Student Life**

142 *Friday Night Lights* **STUDENT LIFE**

142 *friday night lights* **STUDENT LIFE**

142 *friday night lights* **STUDENT LIFE -** *We Make It Great*

142 FRIDAY NIGHT LIGHTS **student life -** *we make it great*

142 ***friday night lights*** STUDENT LIFE - We Make It Great!

LOWERCASE AND UPPERCASE IN THE LADDER

To create folios like this:

Create topics and section like this:

Notice "ATHLETICS" in all caps followed by a hyphen and the thematic section title, "Going for Gold."

If you want lowercase or all caps in your folio design on pages, type them like that in your Topic list.

eDESIGN

ASSIGNING STAFF TO PAGES FROM THE START

Some advisers prefer to assign pages to students as the year progresses, which works as long as you have coverage teams and photographers who are getting content for all pages all year. If that is not the case for you, consider these benefits to assigning ALL the pages of your book to staff members at the START of the year

IMPROVE QUANTITY AND QUALITY OF PAGE CONTENT

When staff members know from the get-go their assignments, they can be looking for photo opps all year before the pages are due.

AN EXAMPLE – Let's say Wrestling is due in February after their season is over, but they hold a car wash in October.

Missed Photos – If you don't assign a staff member to Wrestling until closer to the deadline, it's likely no one will take photos of the car wash.

Vague Answers – Plus, if you wait to ask wrestlers about the car wash in February, they are likely to forget some of the details and to give you blah-blah answers to your questions about it.

On the other hand . . .
Quality Content – When staff members DO know they are assigned to a topic near the beginning of the year, they can be on the lookout all year long for coverage.

AN IDEA – A great use of time during the first month of school is for yearbook staff members to meet with contacts for each assignment. Doing so will reduce stress AND improve quality and quantity.

Contact these people:

TEAMS – coaches, captains, managers, booster leaders
CLUBS AND ORGS - advisors/sponsors, student leaders
FINE ARTS - Directors, teachers, student leaders
ACADEMICS - Department chairs, counselors, admin
EVENTS - leaders, organizers

To achieve those goals:

ESTABLISH YOUR PURPOSE – Introduce yourself

DISCOVER THEIR PREFERENCES – Ask them if they have any preferences/suggestions. Don't make any promises, but be a good listener and strive to honor their preferences if it fits your coverage goals and journalistic principles. Doing so will help you reduce friction and increase satisfaction after distribution.

IDENTIFY A PERSON – Find the best person to be the contact.

CREATE A PLAN –Establish a list of important events/topics to be covered and plan the who/what/where/when/how the content will be gathered.

PREVENT PAGES FROM GETTING FORGOTTEN

Things get busy in Yearbook Land, and if pages go unassigned, it's possible they could get overlooked until it's too close for your comfort. Assigning all pages to a staff member at the start of the year makes sure every single page has someone who knows it's their job to create that page.

CREATE CLEAR COMMUNICATION

Sometimes there can be confusion about who is doing what, especially when there's shared responsibility. This can easily happen with pages the editors want to create (the opening, dividers, index, colophon, closing, etc.). A way to prevent confusion is to check the "Assign" box next to editor's name in the Staff Assignments field so that the editor's name will show up on the ladder and will be included in their filter. That will prevent one editor from saying, "I thought the other editors were going to create that page."

BE READY TO ADJUST YOUR PLAN

Keep in mind that basically all production plans — even the most thorough ones — need to be modified throughout the year.

You should *plan well* and *plan well ahead* anyway because doing so is the very best way to minimize stress and maximize quality.

Set aside time for frequent inspections of your staff's progress, and adjust the due dates and staff assignments as needed to stay on track.

The filter menu is a speedy way to monitor productivity and spot pages that need adjustments made to due dates or staff assignments.

To learn more, search eDesign Help for "The Power of Filtering the Ladder."

eDESIGN

FILTERING THE LADDER BY STATUS, STAFF & DEADLINE

PRO TIPS TO **STRATEGIZE** & **MAXIMIZE** IN eDESIGN

Streamlining your work, monitoring your progress, and supporting your staff are important adviser and editor responsibilities. You need to pinpoint pages on a roll and pages stuck in a rut. You need to find staffers who need a push and staffers who deserve praise. You need to identify deadlines that are on track and deadlines running off the rails. The GREAT news is that filtering the ladder helps you do all that.

FILTERING FOCUSES YOUR ATTENTION

Filtering the ladder empowers you to view pages that share the same attributes so you can easily find what you need.

Click here

Toggle open filters here.
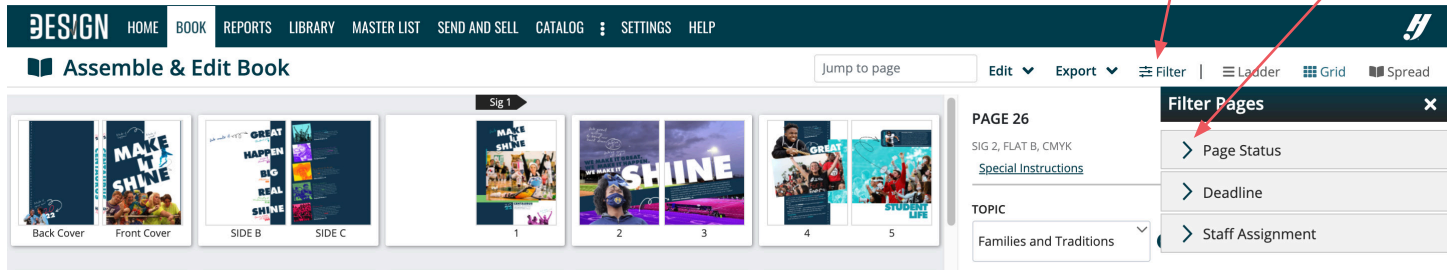
FILTER IN ALL THREE BOOK VIEWS

PAGES IN PREFLIGHT IN LADDER VIEW
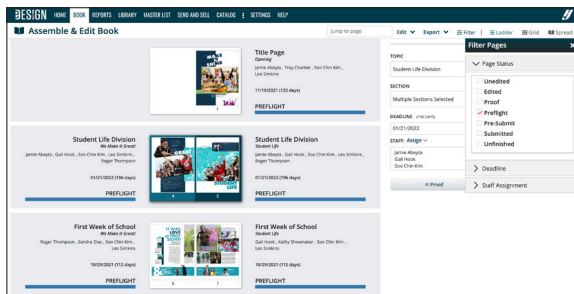
PAGES IN PREFLIGHT IN GRID VIEW
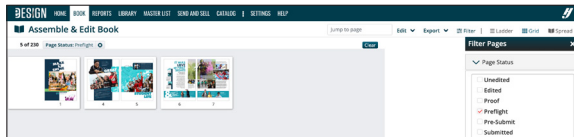
PAGES IN PREFLIGHT IN SPREAD VIEW
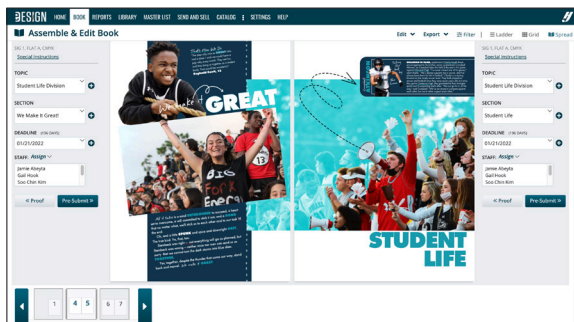
When you toggle from Ladder View to Grid or Spread View, the Filter menu will collapse so it won't be in your way, but filters will remain so you can maintain your focus on the pages you have in view while you go where you need to go.

FILTER BY PAGE STATUS, DEADLINE, STAFF OR A COMBINATION

SELECT ONE OR A COMBINATION OF FILTER TO GET PRECISELY THE INFO YOU NEED
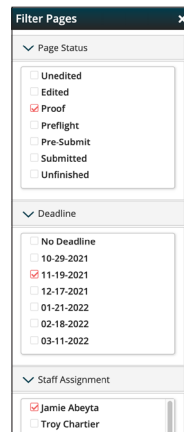
PAGE STATUS
This filter helps focus your work and track progress. A perk to keep in mind is you can move pages as a group to the next or previous level of submission.

DEADLINE
This filter helps you monitor progress on a deadline. It will quickly reveal pages not on track. Also, you can click on a page to open the Page Assignments panel to see to whom it's assigned and to make adjustments as needed.

STAFF ASSIGNMENT
Use this filter to monitor distribution of work among staff members and monitor their progress on pages.

YOU CAN COMBINE FILTERS

It's quite powerful to select multiple filters to apply at one time. In the example below, Jamie Abeyta has four pages in proof that are due on the November 19 deadline.
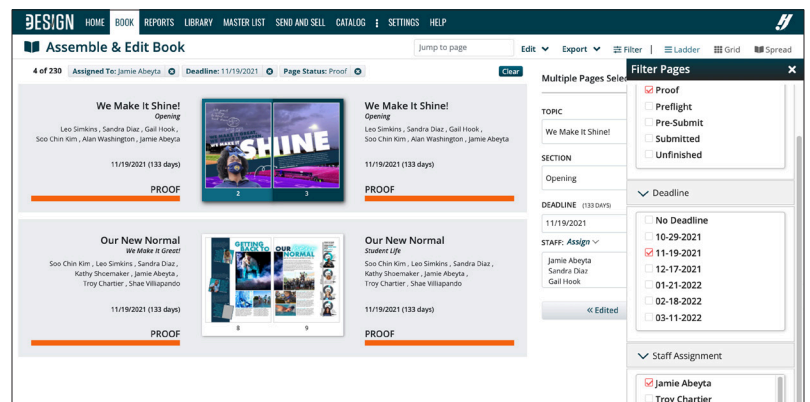
MOVING SPREADS IN THE LADDER

PRO TIPS TO **STRATEGIZE** & **MAXIMIZE** IN eDESIGN

Whether you need to add a topic that was missed at the start of the year or you need to solve a problem later in the year, eDesign's Move Spreads function helps you do it efficiently.

1. **First, select the spread you want to move.** If you want to move more than one spread, simply select more than one spread. In the example below, two spreads have been selected to move

2. **Then go to Edit > Move Spreads.**
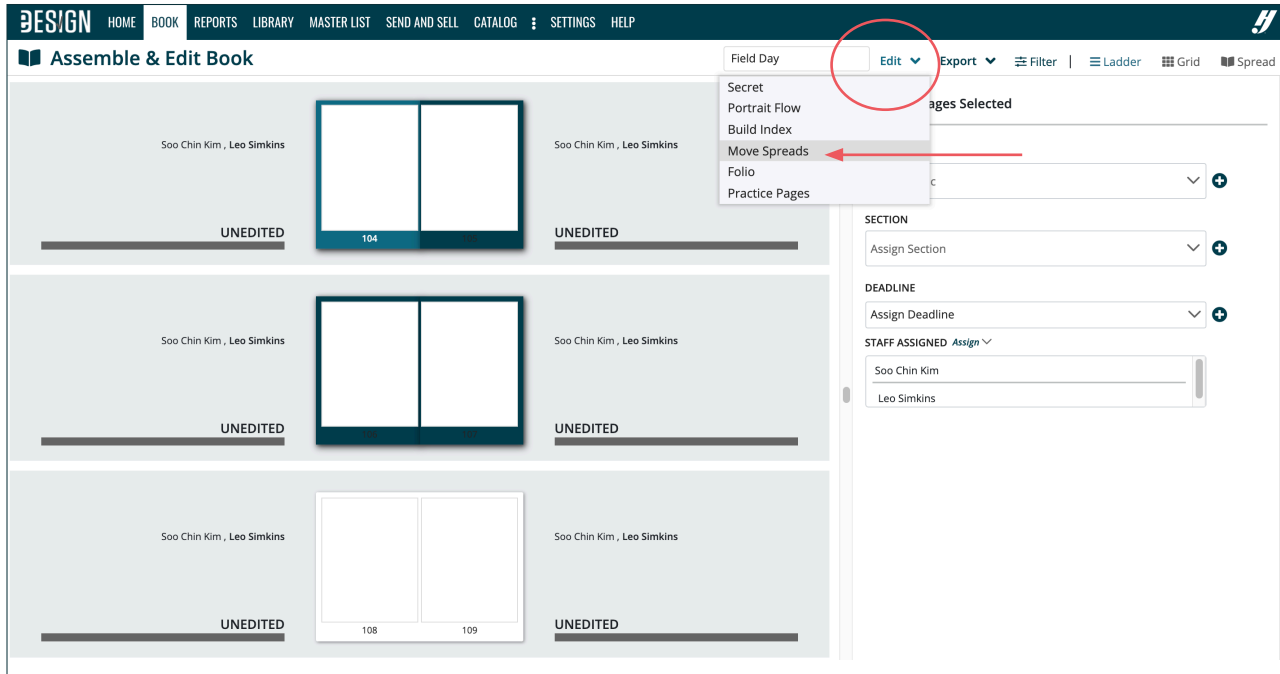
Move Spreads

The spread you've selected in your ladder will be moved in front of the spread you indicate below.

Spreads that are in Preflight, Presubmit or Submitted cannot be moved. The spreads shown below are the move locations available to you based on current page statuses.

Watch Our Wow!	2 - 3	Watch Our Wow!
Dedication	4 - 5	Dedication
Cannot Hide Ou...	6 - 7	Cannot Hide Ou...
Connected durin...	8 - 9	Connected durin...
Student Life Divi...	10 - 11	Student Life Divi...
Chow Time	12 - 13	Chow Time

| Cancel | Move Spreads |

In the Move Spreads window, indicate where you want the spreads to move. The spread(s) you are moving will go ABOVE the pages you select. Then click Move Spreads. When the window closes, the spreads will be in their new position in the ladder and all the pages will be renumbered accordingly.

NOTE — You cannot move pages that are in Preflight, Presubmit or Submitted status, and you cannot move other pages OVER them.

Think of it like this . . .

Clicking here tells eDesign to move the spread(s) ABOVE the gray bar.

FORMATTING TEXT WITHOUT HIGHLIGHTING IT

An efficient way to format text is to use the power of the Control Panel. You don't need to spend time or energy highlighting text when you can simply select a text frame in one click. This method works when you want to apply the same format to all the text in the text frame.

HOW TO MODIFY TEXT FORMATTING WITHOUT HIGHLIGHTING TEXT

This works when you want to format one text frame. Plus, you can Shift-click multiple text frames to format them all at the same time.
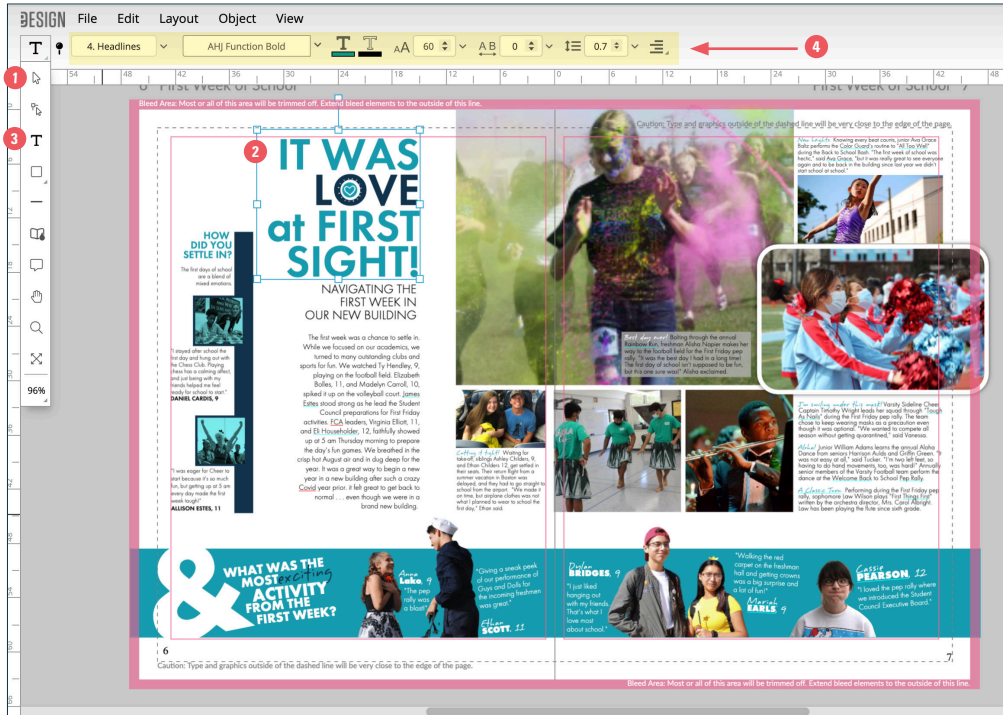
1. Select the arrow tool.

2. Click on a text frame.

3. Click one time on the T tool. When you do, the options to format text will appear up top. You'll see the current formats applied to that text frame. *(See notes below for more info.)*

4. Format the text as you wish. As you make changes to the character style, font, fill color, stroke color, size, kerning, leading, and tracking, eDesign will apply those settings to all the text in the selected frame.

Plus, when you select multiple text frames, you can format them all at one time!
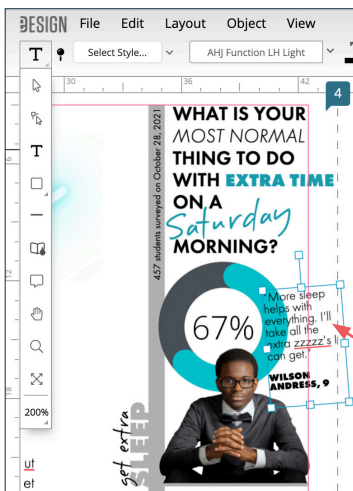
WHAT HAPPENS WHEN YOU SELECT A TEXT FRAME WITH SEVERAL TEXT FORMATS IN IT?

The Control Panel will show you one format in the frame.

In this example, the Control Panel shows how **the quote** is formatted, not how the student's name and grade are formatted.
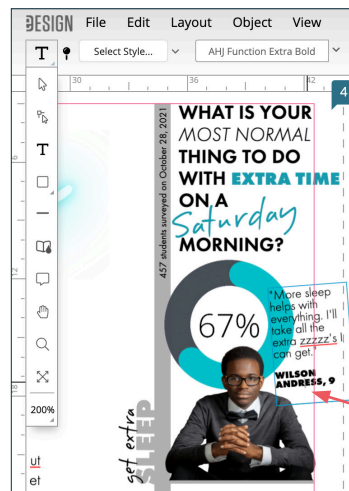
HOW CAN I SEE THE FORMAT OF THE REST OF TEXT IN THAT TEXT FRAME?

Simply click once to put your cursor in a word. When you do, the Control Panel will show how that word is formatted.

In this example, the Control Panel shows how **the name** is formatted because the cursor is in the name.

CUSTOMIZING YOUR FOLIO— TIPS & TRICKS

PRO TIPS TO **STRATEGIZE** & **MAXIMIZE** IN eDESIGN

People say the devil is in the details, but consider this instead — The DELIGHT is in the details. Designing your folio is a great place to delight in the details. It's a task you do once a year, so it seems insignificant, but since it appears on every page, it's something you can maximize to make as detailed and as creative as you'd like. Plus, it's a great place to include visual and verbal spins of your theme.

The folio is the page number and any text you want to go with it. By default, eDesign puts a page number on each page which you can customize to suit the design of your book. You can format its size, font and color, and you can move it anywhere on the page. You can also turn it off if you want a page number only on the right or left pages.

You can also set it up so that eDesign will auto-populate the page topic and section from the ladder, and you can format the text and position.
See the guide titled "Creating Topics with the Folio in Mind" for time-saving tips before you create your topics.

Before you create your folio review these tips and tricks to help you.

THE FOLIO IS ALWAYS ON TOP OF EVERYTHING ON THE PAGE - The folio will always be on top of everything on a page, including the background. In the examples below, notice how the green bar on page 52 and the blue photo on page 53 are under the folio. *An important factor to note is this — Because the folio layer is always on top, don't put a background on the folio layer, or it will cover up everything on the page.*
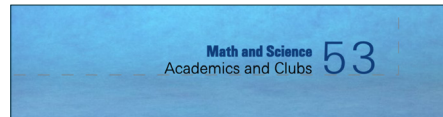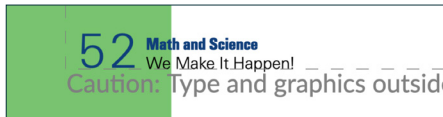
YOU CAN DISABLE THE FOLIO ON INDIVIDUAL PAGES - You can turn off the folio on individual pages if it interferes with the design.
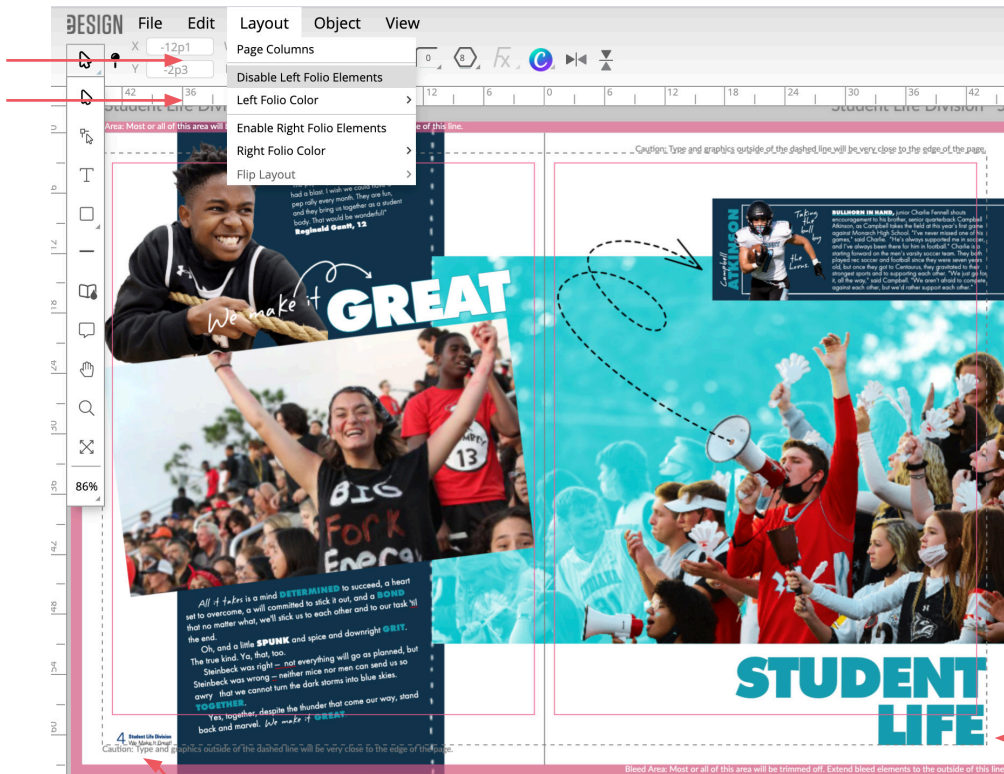
On this spread, the right folio is disabled so it won't interfere with the headline.

The left folio is here.

YOU MAKE CHANGES TO THE FOLIO TEXT ON THE LADDER, NOT ON THE PAGE - While working on a page, if you discover the folio text needs to be modified, you would need to edit the topic and section fields on the ladder. Since the text is auto-populated from the ladder, you won't be able to edit the folio's text on a page.

The word "Your" is supposed to be "You're." If you spot an error in the folio while working on a page, the place to fix it is here on the ladder.

See how the error is here, too!
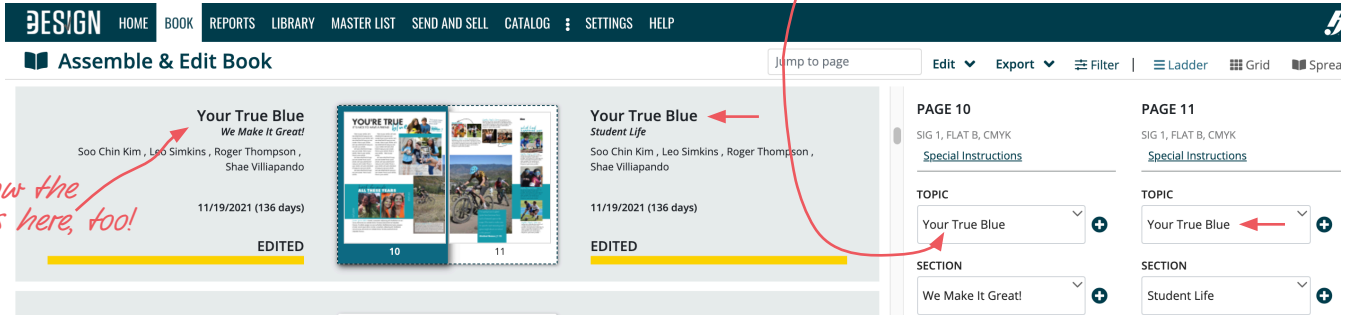
REVIEW AND REVISE THE TOPIC AND SECTION FIELDS BEFORE YOU SUBMIT THE PAGE - You can modify a page's Topic and Section fields on the ladder until you submit that individual page. A page's individual Topic and Section fields in the Page Assignments Panel will lock when it is submitted, so make sure you check the folio text before you submit a page.

TO HAVE ALL CAPS OR ALL LOWERCASE, TYPE IT LIKE THAT IN THE TOPIC & SECTION FIELDS - If you want the topic or section to be all caps or lowercase on the page in the folio, you'll need to edit it on the ladder to be all caps or all lowercase. *See page 11 for examples.*

To create folios like this . . .   *. . .the Topic and Section fields contain this text:*

ALL CAPS here

lowercase here
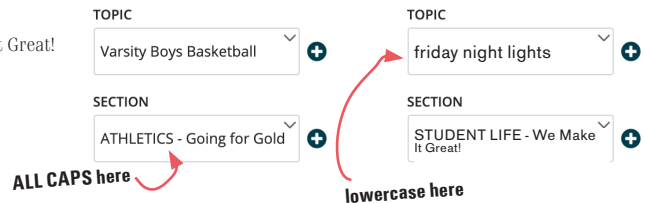
THE FOLIO'S TEXT CAN TOGGLE BETWEEN DEFAULT, WHITE AND BLACK - When on a page, you can change the auto-populated text to black or white, but keep in mind that only the auto-populated text from the ladder, will change, not any supplemental graphics or text you add.
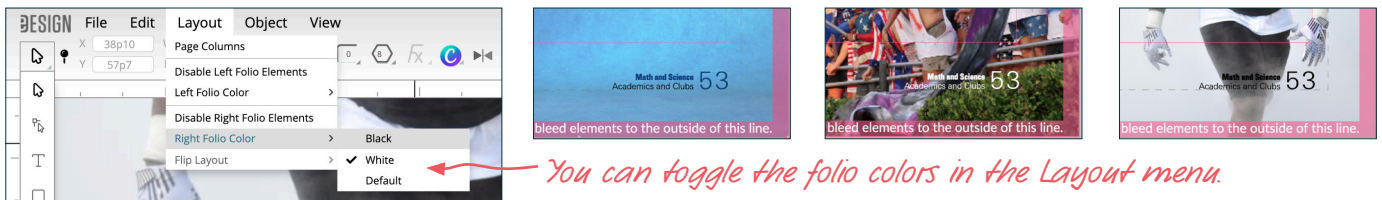
You can toggle the folio colors in the Layout menu.
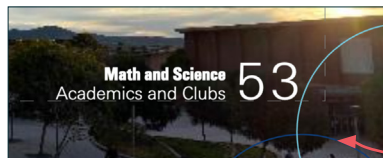
The two circles didn't change to white because they aren't auto-populated text. The circle on the bottom is barely visible due to lack of contrast. Head to the next page to see a solution.

IF YOU WANT TO ADD AN ELEMENT TO THE FOLIO THAT YOU CAN MODIFY ON THE PAGE, DON'T ADD IT TO THE FOLIO —
If you want to add lines, graphics, or text to the folio design that you want to change in color or content while working on pages, *don't include it on the folio layer.* Instead, open a BLANK page and add it there. When it is just right, select the element(s), right click on them, and Lock them.
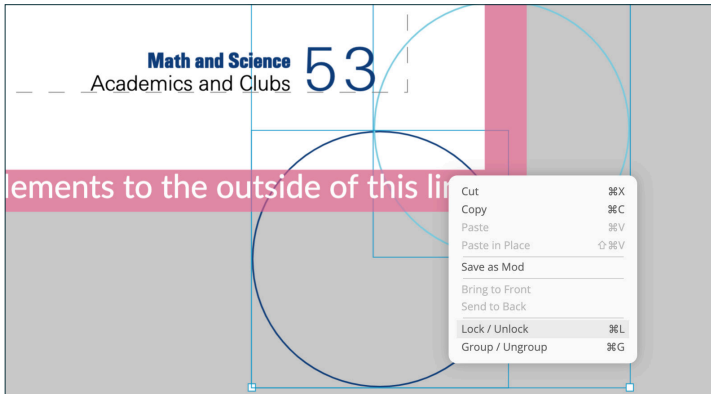
A locked element stays locked when it is saved as a template. That's helpful when you save a template for the folio so that it will maintain its position on all pages.

Then save it as a template (not as a mod) so you'll be able to drag/drop it to each spread and it will land locked in exactly the correct position where you can change its color or content as needed right on the page.
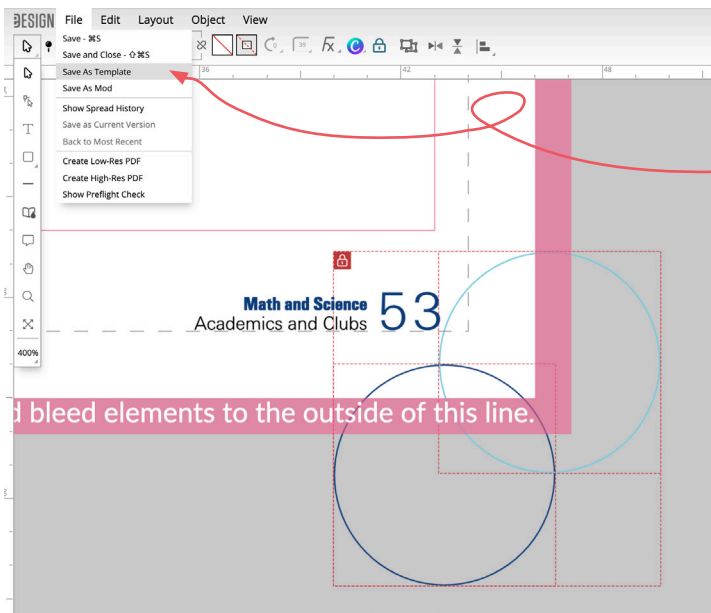
After you lock it, navigate to the File menu and choose "Save as a Template."

If you know you want multiple versions for a color change from section to section, then you can save multiple templates;
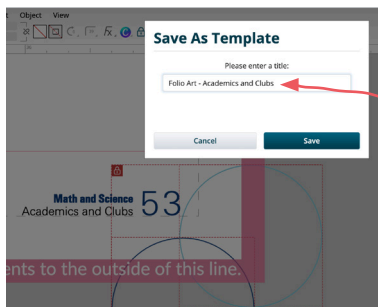
This one is for Academics & Clubs

In this version, the top circle is light blue because that's the thematic color for this section. color.
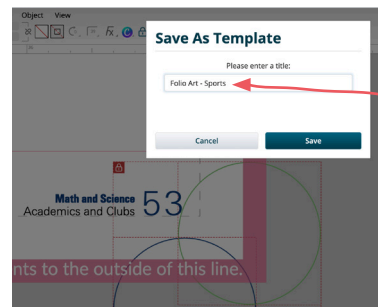
This one is for Sports

In this version, the top circle is green because the sports section's thematic color is green.

ƎESIGN

LENGTHEN AND HEIGHTEN THE TEXT FRAMES SO EVERYTHING FITS — Make sure the text frames on the folio layer for the Page Number, Topic and Section on the folio layer are long enough and tall enough to accommodate the text.

When it doubt, stretch it out so the page numbers, topics and sections will not be cut off by over-set text.

MAKE THE TEXT FRAMES LONG ENOUGH

Here's an example of text frames on the folio layer that are not long enough to fit real topics:
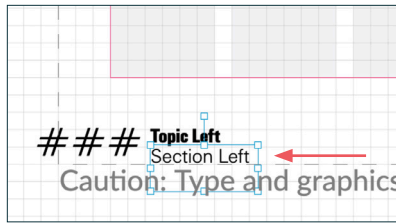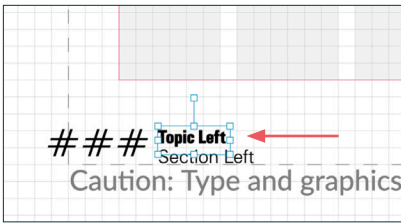
These text frames aren't long enough on the folio layer.
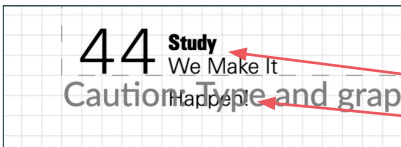
This is how the folio looks on the page. Neither of the text frames on the folio layer are long enough. The topic is "overset," hiding several of the words. The section is spilling onto a second line below the outside margin.

The solution is to **lengthen** the text frames on the folio layer so they can accommodate the longest topic you can imagine. You don't have to search for that — just make it longer than you think it needs to be, and you'll be safe.
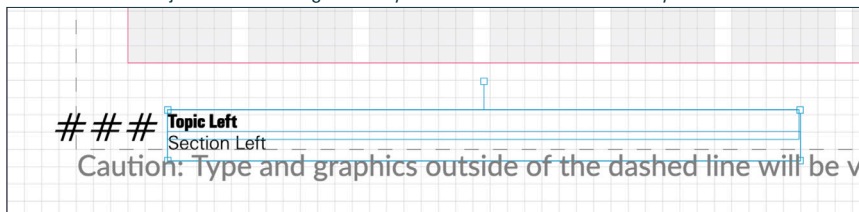
All fixed!
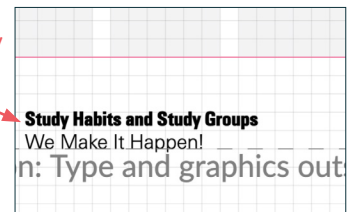
MAKE THE TEXT FRAMES TALL ENOUGH

Likewise, make sure the text frames are TALL ENOUGH to include the full word or number so none of the letters are shaved off by the frame.

INCORRECT | **CORRECT**

HOW IT LOOKS ON THE FOLIO LAYER | HOW IT LOOKS ON THE FOLIO LAYER
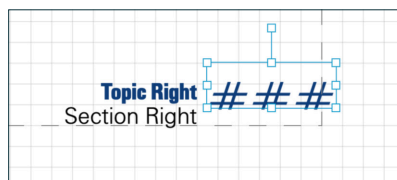
The Problem
The text frame for the page number isn't tall enough.
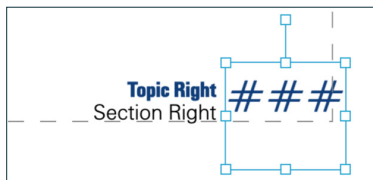
The Solution
Go to the folio layer and drag the text frame down to make it taller.

HOW IT LOOKS ON THE PAGE | HOW IT LOOKS ON THE PAGE

FINALIZE YOUR FOLIO BEFORE YOU SUBMIT A PAGE - If this isn't a good time for you to customize your folio, you can do it later, but keep in mind that after you submit a page, the folio layer and the design are locked, so plan to finish the folio before you submit any pages. *Note – Submitting the cover/endsheets in eDesign will NOT lock the folio layer.*

PREVIEW YOUR FOLIO ON PAGES BEFORE YOU FINALIZE THE DESIGN - Once you format it, preview it on real pages. Placeholder frames won't show how it looks on pages. Check it on pages at the beginning and end of your book to ensure the position and alignment looks good on page numbers with one, two and three digits. A great way to preview the folio on real pages is to work in eDesign in multiple browser tabs.

THIS IS HOW IT LOOKS ON THE FOLIO LAYER.

Topic Left
Section Left
Caution: Type and graphics c

THIS IS HOW IT LOOKS ON THE PAGE.

114 **Swim and Dive**
We Make It Big!
Caution: Type and graphics c
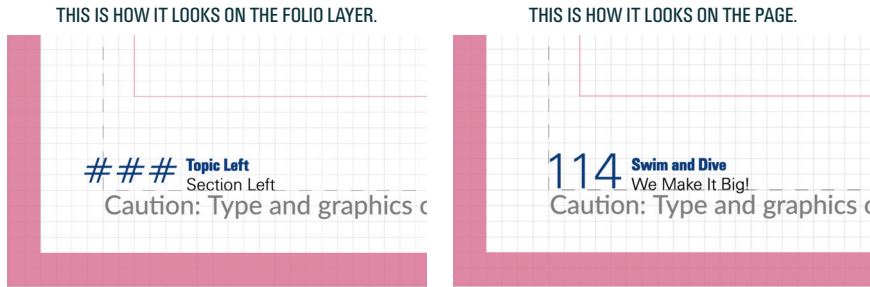
You'll need to assign a topic and section to the pages to properly preview the folio.
If you haven't yet built your ladder with topics and sections, assign some fake ones to the pages you're using to preview the folio. Make them the long so you can check to see if the text frames on the folio layer extend far enough for lengthy text.

USE THE ALIGN TOOLS TO HELP YOU FORMAT THE ADJOINING PAGE. The last step is to format the folio on the other page if you want the folio on both pages. Turn on the document grid in the View menu and use the align tools. To use the align tool, first move the text frame you need to format lower than the others. Then, hold down the Shift key and click on both text frames. Open the Arrange Panel and click the icon for Align to Top. When you do, the one in the lower position will snap up to the one in the correct position.

ARRANGE

Move Forward / Back

Align Objects

Apply Spacing

0p6

Topic Left
Section Left
Caution: Type and graphics outside of the dashed line will be very close to the edge of the page.

Topic Right

Section Right

Bleed Area: Most or all of this area will be trimmed off. Extend bleed elements to the outside of this line.
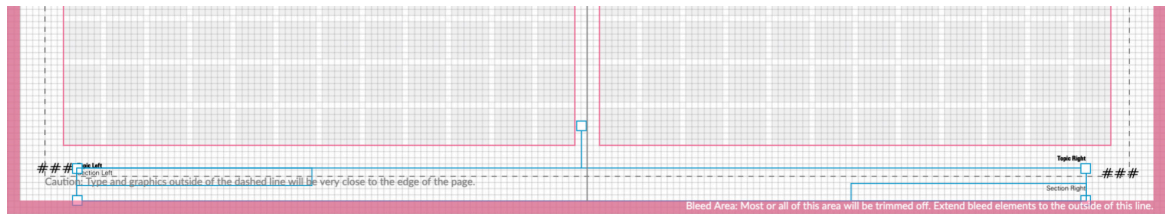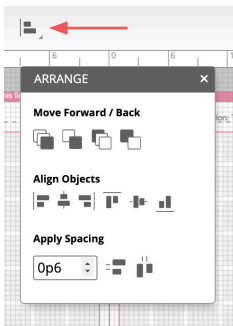
Before using the align tools, move the one you need to move LOWER than the other one
See how the Section on the right is lower than the Section on the left? That's intentional because the one on the left is in the correct position spot. That way when you click "Align to Top" the one on the left won't move.

PREVIEW THE DESIGN AT THE BEGINNING AND AT THE END OF THE BOOK — You want to format the text alignment and position on the folio layer so that your page number looks good with one digit, two digits or three digits.

1.   If your book has 100+ pages in it, make sure the page number's text frame is wide enough to fit a three-digit number.

2.   Use the text alignment that will look good on ALL pages. Check it in the beginning, middle, end. For example, you could check pages 6-7, pages 86-87 and pages 286-287.

3.   It's best to avoid gaps between the page number and the Topic/Section. In the examples below, the reason there are gaps in these up top is that the page number has the same text alignment as the titles and sections, so the single digits 6 and 7 are aligned *away* from the topic and section.

6 **First Week of School**
We Make It Great!
Caution: Type and graph

First Week of School
Student Life
7
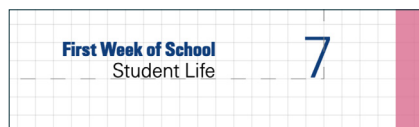
To prevent gaps, format the text like these:

6 **First Week of School**
We Make It Great!
Caution: Type and graph

First Week of School
Student Life
7

LEFT PAGE —
• align page number to the right
• align Topic and Section to the left
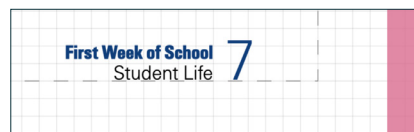
RIGHT PAGE —
• align page number to the left
• align Topic and Section to the right

ƎDESIGN

PLANNING STRATEGIC DEADLINES LIKE A PRO

PRO TIPS TO **STRATEGIZE** & **MAXIMIZE** IN eDESIGN

Taking the time at the start of the year to create a strategic plan for creating, reviewing, revising and submitting pages will not only reduce your stress, it will also boost the quality of your book and the fun you have all along the way. Create a routine for getting work done, and spread it out evenly through the year and among your staff. Importantly, build into your schedule WIGGLE ROOM to give you peace of mind when your plan goes awry.

FIRST, MAP OUT THE YEAR.

It's important to plan out your entire year from the get-go. Map out each week so you can maximize productivity and minimize worry. Look in your kit for calendars and stickers (shown below) to help you.

- **CREATE MINI-DEADLINES** – Break up the year into mini deadlines that give ample time for editing before the pages are due. For example if you have four plant deadlines, give yourself five or six mini deadlines to break up the work into smaller chunks to complete through the year.

- **SET EARLY DUE DATES** –Set page-completion deadlines that are well ahead of your plant deadlines so that you have plenty of time to solve problems, edit the pages, and polish up the pages. By working ahead of schedule you significantly minimize stress and maximize quality.

- **START AT YOUR FINAL AND PLAN BACKWARD**
Plan from the "bottom up." Start at your final deadline and work your way backward to January. Then plan a deadline to fit nicely between Thanksgiving and winter break, and then plan a few prior to Thanksgiving.

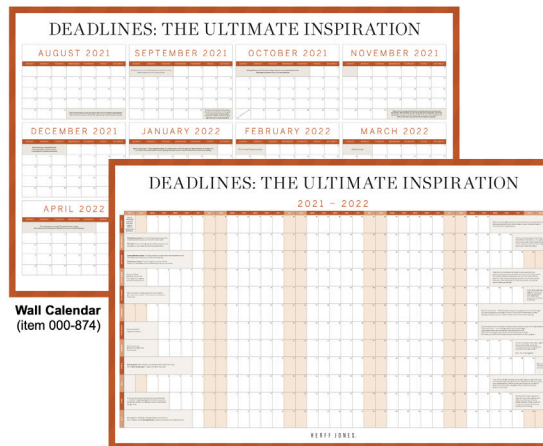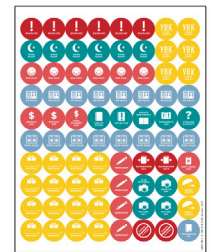- **CREATE A ROUTINE** – People can really benefit from a routine. Just as people benefit from having a good morning routine to get ready for the day, it's good to have a production routine for creating pages. Below is an example of one school's plan for first semester. This shows how you can plot it out on a calendar. (In the example below, the holidays are in gray, and the mini-deadlines are in yellow.)

DEADLINES: THE ULTIMATE INSPIRATION
AUGUST 2021 · SEPTEMBER 2021 · OCTOBER 2021 · NOVEMBER 2021
DECEMBER 2021 · JANUARY 2022 · FEBRUARY 2022 · MARCH 2022
APRIL 2022

Wall Calendar (item 000-874)

DEADLINES: THE ULTIMATE INSPIRATION
2021 – 2022

HERFF JONES

Wall Calendar Stickers (item 000-451)

Strategic Plan			Monday	Tuesday	Wed.	Thursday	Friday	Production Cycle	Details
Bond as a YBK Staff Set Goals Generate YBK Hype Plan Theme & Design Cover Plan Ladder Learn YBK Journalism Learn eDesign Create Templates & Guides Create Procedures & Routines					8/11	8/12	8/13	Bond and set goals.	Bond with staff and set goals for your book, productivity, relationships, and experience.
			8/16	8/17	8/18	8/19	8/20	Plan Theme	Learn about theme and brainstorm it. Finalize by Friday and provide Gwen with cover idea
			8/23	8/24	8/25	8/26	8/27	Plan Ladder	Plan your ladder. Finalize and page topics and staff assignments by Friday. Put it into eDesign.
			8/30	8/31	9/1	9/2	9/3	Learn YBK Journalism	Learn about copy, captions, photography and design.
			9/6	9/7	9/8	9/9	9/10	Learn eDesign	Learn how to use eDesign.
			9/13	9/14	9/15	9/16	9/17	Learn eDesign	Learn how to use eDesign. Complete an "All about Me" project
			9/20	9/21	9/22	9/23	9/24	Fall Break	Fall Break
			9/27	9/28	9/29	9/30	10/1	Design Pages	Design your page templates — Tiitle Pages, Opening, Dividers, Folio and Layouts
			10/4	10/5	10/6	10/7	10/8	Create Roles and Rubrics	Set the Standard & Plan Your People - Create Guides & Rubrics. Define Roles & Responsibilities
Deadline #1	1	Collect	10/11	10/12	10/13	10/14	10/15	Gather Content	Content Due - Photos, Interviews, Polls, Data, Names, etc.
	2	Create	10/18	10/19	10/20	10/21	10/22	Create Final Draft	Final draft due Oct 22
	3	Refine	10/25	10/26	10/27	10/28	10/29	Revise Final Draft	Submit Oct 28. Celebrate Oct. 29
Deadline #2	1	Collect	11/1	11/2	11/3	11/4	11/5	Gather Content	Content Due - Photos, Interviews, Polls, Data, Names, etc.
	2	Create	11/8	11/9	11/10	11/11	11/12	Create Final Draft	Final draft due Nov. 12
	3	Refine	11/15	11/16	11/17	11/18	11/19	Revise Final Draft	Submit Nov. 18. Celebrate Nov. 19.
Relax :)	Thanksgiving		11/22	11/23	11/24	11/25	11/26	Thanksgiving Break	Thanksgiving Break
Deadline #3	1	Collect	11/29	11/30	12/1	12/2	12/3	Gather Content	Content Due - Photos, Interviews, Polls, Data, Names, etc.
	2	Create	12/6	12/7	12/8	12/9	12/10	Create Final Draft	Final draft due Dec. 10
	3	Refine	12/13	12/14	12/15	12/16	12/17	Revise Final Draft	Submit Dec. 16. Celebrate Dec. 17.
Regroup, Refresh, Relax :)	Final Exams		12/20	12/21	12/22	12/23	12/24	Final Exams	Final Exam Week
	Winter Break		12/27	12/28	12/29	12/30	12/31	Winter Break	Winter Break
	Regroup		1/3	1/4	1/5	1/6	1/7	Retart and Regroup	Restart and Regroup - Evaluate any changes to be made

This is just an example. Create a plan that works perfectly for you.

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SECOND, ASSIGN A DEADLINE TO EVERY PAGE.

This is an optional method to maximize efficiency and minimize stress. Since all schools are different, you may need to modify it to best suit you.

1. **First assign all pages that are date-sensitive.**

   SPORTS and SCHEDULED EVENTS - Choose the closest deadline after the event or after the sports season ends so you can cover the full event will be fresh on everyone's minds to make it easier to cover.

   - Since you are assigning a deadline after the season ends, it is VERY IMPORTANT that you make a plan to take photos DURING the sports season or the event. The date in eDesign is when the page is due, so planning ahead to take the photos is a must.

   - If your spring sports take place during your final deadline, then you'll need to finish those pages during the season.

   PORTRAIT PAGES - Select a deadline that's 5 - 6 weeks after retakes.

   - Most school photographers need 3 - 4 weeks to give you the PSPI file you'll use to import portraits into eDesign. Ask your school photographer when you can count on having the PSPI file in-hand.

   - You'll need about 1-2 weeks to properly edit the portraits.

   - If you have senior portraits, collaborate with your school photographer to set a deadline for senior portrait selection so you'll get the portraits when you need them for your page submission deadlines (or for UV lamination deadlines if you apply UV lamination to those pages).

   - If you include class pictures on portrait pages, talk to your photographer about when you can count on getting them.

   CLUB GROUP PHOTOS - If planned proactively, these pages can be a big help to meeting a deadline.

   - If this day is already on the school calendar, choose the deadline that immediately follows club picture day. That way it will be fresh in everyone's minds and easier to solve problems identifying people or groups.

   - If you get to set club picture day, you'll gain for yourself more peace of mind and less stress if you schedule club picture day during first semester rather than waiting until your final deadline.

   AD PAGES - Talk to your yearbook rep about the best date to end your ad sales so you can adjust the number of pages in your book if necessary before the final page count is due. Assign a deadline to your ad pages that provides you ample time to create and edit the ad pages after your ad deadline.

2. **Then assign to the final deadline any pages that need to be saved for last.** These pages will differ from school to school, but in addition to spring sports and spring events, schools typically save the index, the colophon and the closing for end.

3. **Next, go to Settings > Deadlines. Jot down the subtotals under Staff Deadlines.**

   Your objective is to distribute your work as evenly as possible throughout the year. Later you'll compare your staff deadlines to your plant deadlines to see if there are places they don't align, but since we're still working on assigning dates to pages, our immediate goal is to identify times of the year that need balance.

Staff Deadlines		
Total Pages Assigned 327		**+ Add**
Date	**Number of Pages Assigned**	
October 22, 2021	14	🗑
November 12, 2021	28	🗑
December 10, 2021	88	🗑
January 21, 2022	112	🗑
February 11, 2022	22	🗑
March 10, 2022	63	🗑

   THE LIGHT DEADLINES – List the deadlines that are light so that you'll know which dates can take on more pages.

   In this example, Oct. 22, Nov 12 and Feb 11 are very light and need more pages.

   THE HEAVY DEADLINES – Likewise, note any of your staff deadlines that are too heavy so you make changes to more evenly distribute your work through the year.

   On the other hand, Jan. 21 is heavy and needs fewer pages. You could assign some of those pages to the lighter dates to give yourself better balance.

   SIDE NOTE – Due to the way school events unfold, there will likely be some dates that will have to be heavier than others. You most likely won't be able to make them exactly even. However, working now to distribute work your work across many months now will ease your stress later.

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4. Next go back to the ladder to assign dates to the rest of the pages and move pages from the heavy dates to light ones.

- To easily do that, click on the Filter menu, and toggle open the Deadline section.
- First, check the box next to No Deadline to show all the pages you haven't yet assigned a deadline.
- Then close the filter menu by clicking the x in the upper right corner of the Filter menu.
- Then you can click on the pages in the ladder and continue assigning dates to those pages as you did previously.
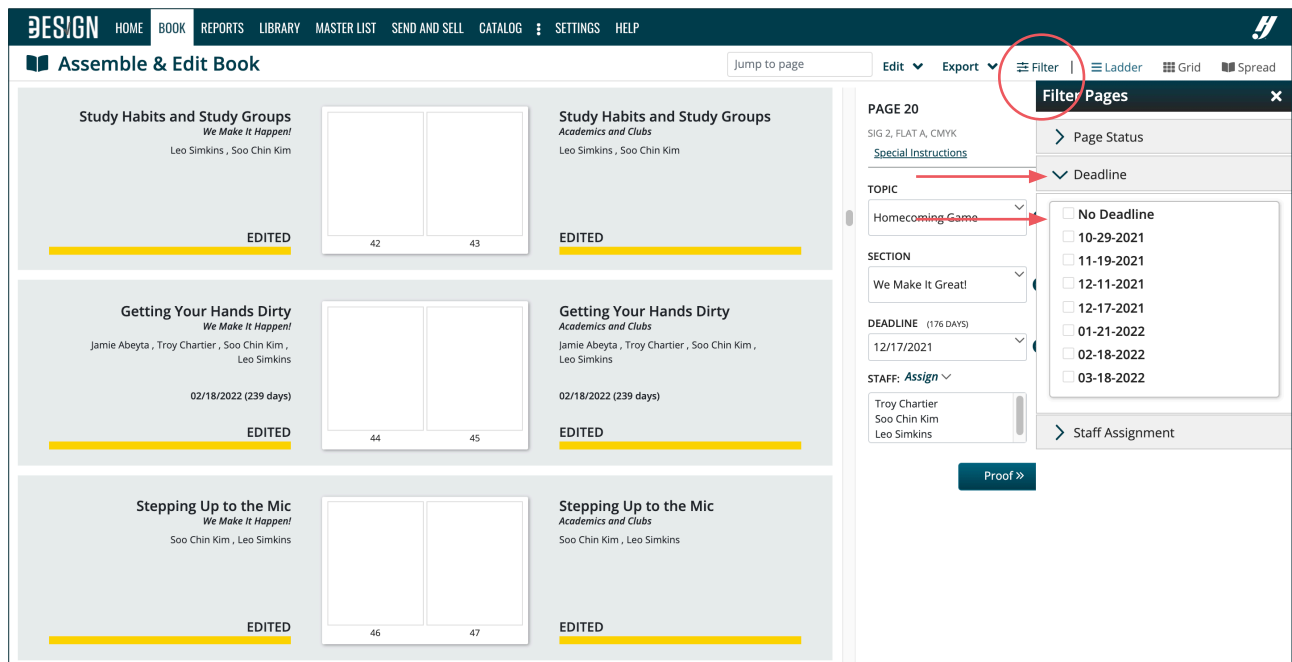
- You can continue your work by filtering the ladder by different deadline dates. When you do, you'll see in the top left corner the number of pages you've assigned to that date. You can clear a filter by either deselecting the box in the filter menu or by x-ing out the filter in the top left by the page total summary. Continue working to balance your work throughout the year.
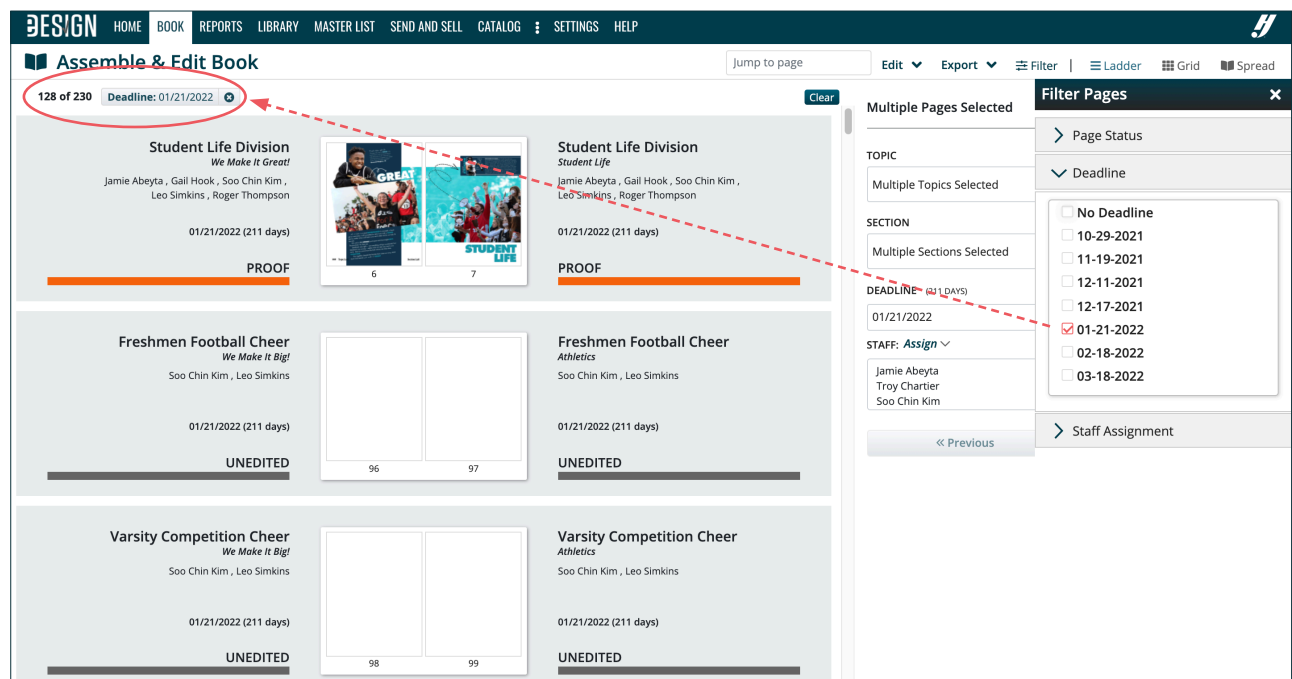
THIRD, COMPARE YOUR STRATEGIC DEADLINES TO YOUR PLANT DEADLINES.

NOTE — ADVISERS IN KEY OR A+ PROGRAMS CAN SKIP THIS THIRD STEP

Since you are in the Key program or the A+ Program, you can skip this step because you only have one deadline. However, sticking to the strategic plan you've created is VALUABLE because it distributes your work throughout the year so that you can pace yourself and give yourself plenty of time to create, review, edit and submit pages before your submission deadline.

The next step is to compare your staff deadlines to your plant deadlines to see if your strategic plan will meet your deadlines.

1. Go back to Settings and click on the Deadline tab.

2. Compare the page counts on the plant deadlines to those on your staff deadlines.

An example – The October 22 deadline has a problem to resolve. The Oct. 22 deadline has 60 pages allotted to it. The Nov. 8 plant deadline has 70 pages due. That means even though you'd be *two weeks ahead of schedule*, you won't have enough pages to meet the Nov. 8 deadline.

3. If there are any plant due dates or page count totals that don't align with the deadlines you've assigned to pages, you have two ways to fix it:

*   Go back to Book and modify your deadline assignments on pages until you have more pages assigned to a date than will be needed to meet the deadline. Give yourself wiggle room by assigning more pages to submit than are due.

*   Ask your rep or CSA if the plant deadline can be modified to a lower number of pages due. It is important to do this at the beginning of the year so that the production team can plan ahead for the modification. Also, please keep in mind that your final deadline has a direct correlation to your ship date, so changing the date of your final deadline will necessitate a change in your scheduled ship date.

*   The final deadline's page count looks like it has a problem to resolve, too, but it doesn't. The final staff deadline has 36 pages assigned to it, but the plant deadline has 50 pages due. At first glance, that looks like it will be short, too, just like the Oct. 22 deadline is, but being low on the final deadline is great! That means you're planning to submit more pages than are due all along the way. Due to problems that may arise through the year, you likely you won't be able to stay ahead like that all year long, which is precisely why you should plan wiggle room from the start.

GIVE YOURSELF ROOM TO BREATHE AND TIME TO SOLVE PROBLEMS.

What you are striving to create is WIGGLE ROOM to help you reduce stress and to give yourself extra time to solve problems that arise. As you plan your staff due dates and assign dates to pages, you want to create TWO kinds of wiggle room:

1. **Wiggle Room with TIME** – Work ahead of schedule and give yourself plenty of time before the plant deadline to complete pages so your back isn't up against the wall when it comes to plant deadlines. The only deadline that you'll probably be cutting it to the last day is your final deadline, which is normal.

2. **Wiggle Room with PAGES** – Plan to create more pages than are due so when a cancellation takes place or when someone isn't able to complete their pages, you have plenty of pages and can still meet your plant deadlines. That significantly reduces your stress!

CREATING COLORS WHILE WORKING ON A PAGE

Sometimes you want to create colors when you're right in the middle of designing pages. The good news is you don't have to be in Settings to create a color. You can also create one while you work. As always, it's very important to make color selections from a printed swatch. To learn more about that, see page 26 of the Adviser and Editor's Start Up Guide to setting up eDesign.

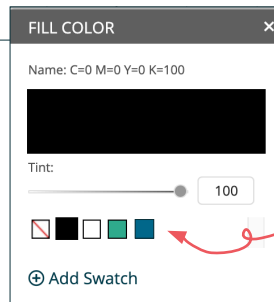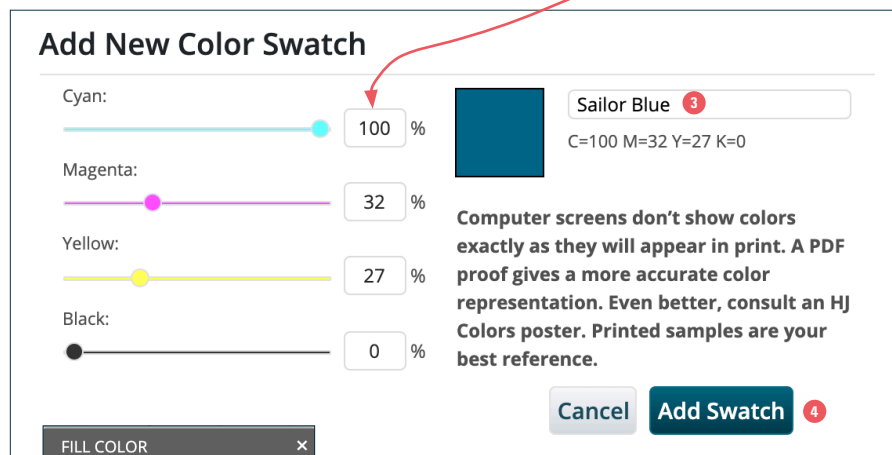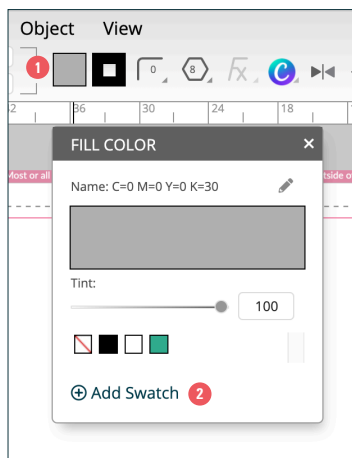## CREATING COLORS FROM A PRINTED SWATCH WHILE ON A PAGE

Before you create a color, start with a printed swatch. A great resource is the Colors poster in your kit. If you can't find it, contact your CSA. Your CSA's contact information is posted on eDesign's Home screen in the lower left corner.

C.23 M.97 Y.53 K.0	C.5 M.20 Y.0 K.0	C.19 M.46 Y.6 K.0	C.36 M.19 Y.10 K.0	C.34 M.12 Y.0 K.0	C.50 M.5 Y.0 K.0	C.31 M.9 Y.18 K.0
C.15 M.100 Y.0 K.29	C.25 M.50 Y.0 K.0	C.41 M.78 Y.5 K.0	C.36 M.29 Y.10 K.0	C.60 M.41 Y.0 K.0	C.85 M.34 Y.0 K.0	C.58 M.9 Y.21 K.0
C.23 M.87 Y.0 K.0	C.59 M.80 Y.0 K.0	C.80 M.100 Y.0 K.0	C.100 M.90 Y.3 K.4	C.100 M.70 Y.0 K.10	C.95 M.75 Y.45 K.33	C.100 M.32 Y.27 K.0

Let's say you want to use the blue below on the Colors Poster.

First, note its CMYK blend:

Cyan = 100
Magenta = 32
Yellow = 27
blac**K** = 0

To add a color while working on a page, do the following:

1. Click on the Fill Color icon in the Control Panel up top.
2. Click Add Swatch in the Fill Color modal that opens up.
3. Optional - Give it a custom name (or keep the CMYK blend eDesign will automatically put there).
4. Click the Add Swatch button to save it.

Object   View

FILL COLOR

Name: C=0 M=0 Y=0 K=30

Tint: 100

Add Swatch

Add New Color Swatch

Cyan: 100 %

Magenta: 32 %

Yellow: 27 %

Black: 0 %

Sailor Blue 3

C=100 M=32 Y=27 K=0

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.

Cancel   **Add Swatch** 4

FILL COLOR

Name: C=0 M=0 Y=0 K=100

Tint: 100

Add Swatch

After you add it:
After you add it, the color will show up in your line-up of approved swatches and will be available on all pages.

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