Photo by Madison Gonzales

USING YEARBOOK 360

and Online Design manual

Walsworth yearbooks

USING YEARBOOK 360 AND ONLINE DESIGN

INTRODUCTION

Using Yearbook 360 and Online Design

The process for creating that one book that tells the story of your school's year and captures all the precious memories is constantly evolving.

Today, many yearbook staffs build their book entirely online using the power and convenience of the internet. Walsworth's Yearbook 360 and Online Design harness that power and provide the advanced tools and capabilities you need to build the yearbook you want.

This manual will give you an overview of Yearbook 360 and Online Design, cover all the basics and get you well on your way to creating your masterpiece. But it's just the beginning. Throughout the year, continue to reference the Online Design section at **yearbookhelp.com** for answers to your questions.

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SECTION 1
GETTING STARTED

GETTING STARTED

To begin working on your yearbook with Yearbook 360 you need to get organized. This section outlines the following:

- The list of system requirements your computers must be ready to handle in order to run Online Design
- How to log in, create staff user accounts and set permission levels
- Functionality on the Home page, which provides a snapshot view of your entire book's progress in one spot
- Yearbook 360's internal messaging system, which will allow your staff to stay in constant communication

SYSTEM REQUIREMENTS

Meet with your school's network administrator at the beginning of the year and review what your computers will need to run Online Design. Share this list of system requirements.

Required Internet Bandwidth

Minimum of one and a half Megabit per second, or better, inbound, and outbound, available to any workstation connecting to Online Design.

Web Caching

Walsworth URLs should be exempted from the school district's web-caching policy.

Required Firewall Ports

Online Design requires a persistent connection for a two-way exchange of data. Port 443 must be open both directions in the firewall or proxy.

Supported Browsers

(Recommended in order of best performance)

Google Chrome 100 or newer, Microsoft EDGE Chromium 100 or newer, Mozilla Firefox 100 64-bit or newer, Safari 14.1 or newer. All browsers must be TLS1.2 compliant. NOTE: Internet Explorer 11 is no longer supported. Microsoft discontinued support in February 2020.

Supported Hardware and Operating Systems

Windows 10, Apple Mojave or newer, Chromebooks. (iPads are not supported.) Online Design requires a connected mouse device for touchscreen capable machines. Touchscreen input is not compatible with Online Design.

NOTE

Images stored on Google drive can NOW be directly uploaded to Online Design

GETTING STARTED

SECTION 1

Required URLs for Firewall and Content Filter

https://*.walsworthyearbooks.com (recommended)*

https://yb360.walsworthyearbooks.com

https://ybsto.walsworthyearbooks.com

https://haven.walsworthyearbooks.com

https://help.walsworthyearbooks.com

https://cdnjs.cloudflare.com

https://ace.yearbookforever.com

https://snap.yearbookforever.com

https://snapapi.yearbookforever.com

https://wpcgo.yearbookforever.com

https://static.yearbookforever.com

* **walsworthyearbooks.com** may be used to replace all walsworthyearbooks.com individual URIs in the content filter; however, some filters may require individual URL permission.

If your school is using Yearbook AR, please allow these URLs below:

https://*.blippar.com

https://accounts.blippar.com

https://blipps.blippar.com

https://html.blippar.com

https://img.blippar.com

https://builder.blippar.com

https://img.blippar.com

Security note: If implementing an Intrusion Prevention System (IPS), please add Walsworth URLs to the exception list. Yearbook 360 does pass data in the form of XML, which can be misinterpreted by some IPS as malware.

Adobe Acrobat/Reader PDF

At minimum, Adobe Acrobat Pro DC or Reader DC should be installed and activated for your browser.

Proxy Servers and Proxy PAC Files

Members Only and Online Design have not been written to be proxy auto-config (PAC) file aware. Also, it is recommended that Walsworth URLs be exempted from proxies.

Recommended Network Connection

Cat5e or better wired connections: Wired connections will remain more stable than wireless connections. Wired connections, in general, have a greater throughput than wireless connections. If using wireless connections, we recommend being near the wireless access point. The wireless access point should be strong enough to handle many connections.

Wireless Networks and Online Design

It is highly recommended that Online Design users connect over a standard network cable at 100 Mbps or better. While the program can be accessed and run over a wireless connection, any interference with the wireless signal can result in lost connections and very slow performance. Whenever possible, use a cabled connection over a switch.

Recommended Basic Browser Settings

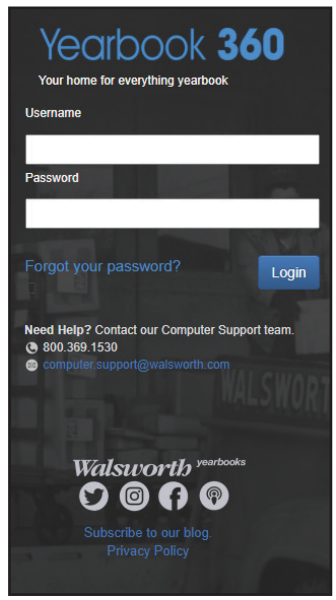
Empty Temporary Internet Files folder when browser is closed. Modify or disable "Pop-up Blocker" for Walsworth URLs. Use TLS 1.2; Enable Java scripting. Allow Third party cookies or set Walsworth URLs as exemptions. Third party blockers such as **AdBlock** Plus and **UBlock Origin** will interfere with normal functionality of Online Design. Please set them to allow: **https://ui.walsworthyearbooks.com:443; https://portal.walsworthyearbooks.com:443.** (Chrome) Safe Browsing for downloading should be set to "Standard Protection", allowing the user to decide whether to keep or discard any downloads through the browser. Never save a signed-in login page. This can result in a future login failure.

LOGGING IN TO YEARBOOK 360

Getting logged in to Yearbook 360 should be the easy part.

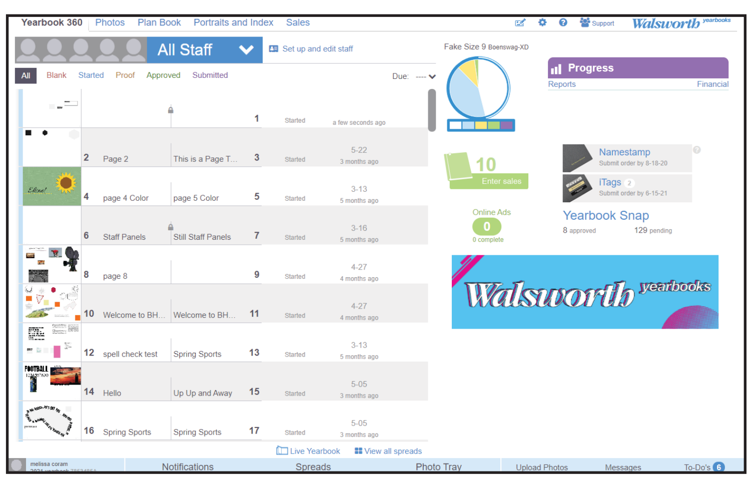
All new customers and new advisers will receive a welcome email with their username and password, which they can use to log in for the first time. Existing customers maintain their username and password. To log in:

1. Go to **walsworthyearbooks.com**.
2. In the upper right corner, click **Login**.
3. Type in your username and password. Click **Login**. You will now be directed to the Yearbook 360 page.



YEARBOOK 360'S HOME PAGE

After logging in, each Yearbook 360 session starts on the home page, which functions like a dashboard and provides quick access to the most important information about your yearbook.



Take a look around the home page:

- **Primary navigation –** The main navigation menu in the top left corner is persistent throughout Yearbook 360 and takes you to the six areas of the site: Yearbook 360 (home page), Photos, Plan Book, Portraits and Index and Sales. Each of these areas are outlined in this manual.
- **Ladder –** A snapshot view of your ladder is front and center on the home page, showing you the current status of every spread. It features a drop-down menu of staffers at the top of the ladder for advisers so they can zero in and see what work is being done.
- **Book Progress –** The Book Progress pie chart provides a constant graphic reminder of your book's progress.
- **Photopea –** The picture icon in the upper right corner launches the Online Design Photo Editor.
- **Help –** The question mark icon in the top right corner will take you to the Yearbook Help website.
- **Support –** This link launches a modal window that gives you access to live support via chat.
- **Live Yearbook –** This link located at the bottom center of the page opens a window that shows the current status of your spreads in a page flipper.
- **Footer navigation –** Within Online Design's persistent navigation along the bottom of the page, there are links to open messaging, To-Do's, upload photos, access spreads and notifications sent by Walsworth Yearbooks.
- **Logout –** Click here in the footer when you are done working to exit Yearbook 360.

YEARBOOK 360'S SPREAD COLOR CODING

Your page editing will all be done within the Online Design page editor. You can track the progress of the spreads in your Ladder on the home page using Online Design's color coding system, which assigns a specific color to each spread depending on its status.

A color tab appears next to the thumbnail of a spread in the Ladder, representing these levels:

- Started – Blue
- Proof – Yellow
- Approved – Green
- Submitted – Purple
- Blank – No color

This color coding is used in the links that appear at the top of the home page Ladder.

Clicking the links allows you to display that specific set of spreads.

The colors are also used to graphically illustrate spread progress in the pie chart that appears on the home page.

USING THE MESSAGE CENTER

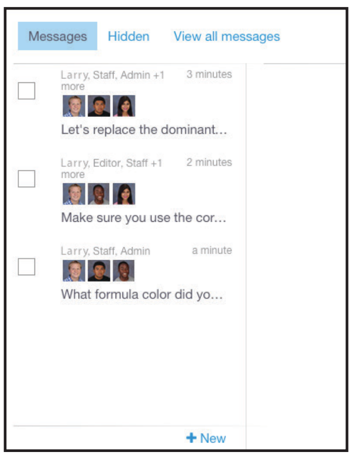
As you work throughout the year, your yearbook staff needs ways to communicate. Yearbook 360 provides a couple of different ways for users to communicate in real time right within the program.

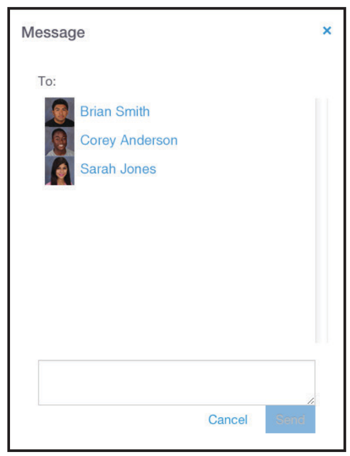
Staff members can send instant messages about a deadline, a question about a spread or a story or any other topic using the Message Center.

Messaging in Yearbook 360 resembles chat sessions used on most social media sites or smartphones, so it's easy to follow.

To send a new message:

1. Click **Messages** in the lower right corner of the screen in the footer navigation.
2. In the window that pops open, click **+New**.
3. In the new message window, all users will be displayed under the **To:** menu. Scroll through and click to select who will be receiving the message. You can click more than one person to receive a message.
4. Type your message in the text field.
5. Click **Send**.





To read existing messages:

1. Click **Messages** in the lower right corner of the screen in the footer navigation.
2. In the window that pops open, your list of past conversations will be displayed in the left column. Click to highlight the conversation you want to read.
3. The highlighted conversation will be displayed in the column on the right. You can continue the conversation by typing a message in the text box and clicking **Send**.
4. You can hide a conversation by clicking the check box next to it in the left column and clicking **Hide**. Click the **Hidden** tab at the top of the column to view these hidden messages.

USING TO-DO'S

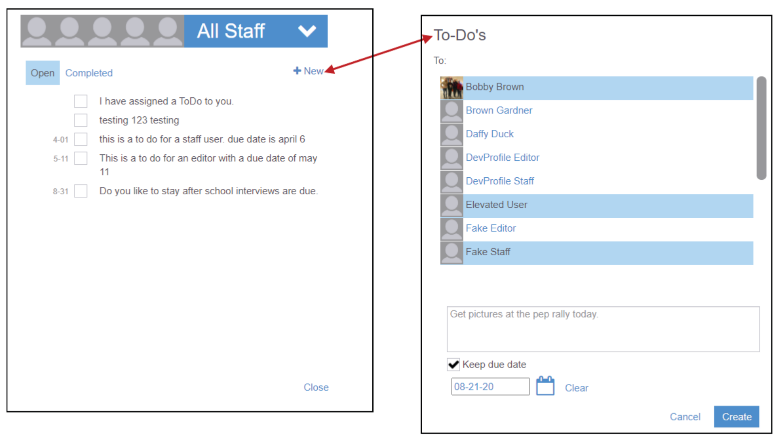
Another quick, easy method of communication that Yearbook 360 users have at their disposal is the ability to leave To-Do notes for other yearbook staffers. To-Do's come in handy whenever you need to leave a reminder about an assignment or deadline or edits on a spread. Administrators and editors can leave To-Do's for anyone while staff-level members can make assignments to themselves. Permission levels can be set to allow staff members to assign To-Do's to one another.

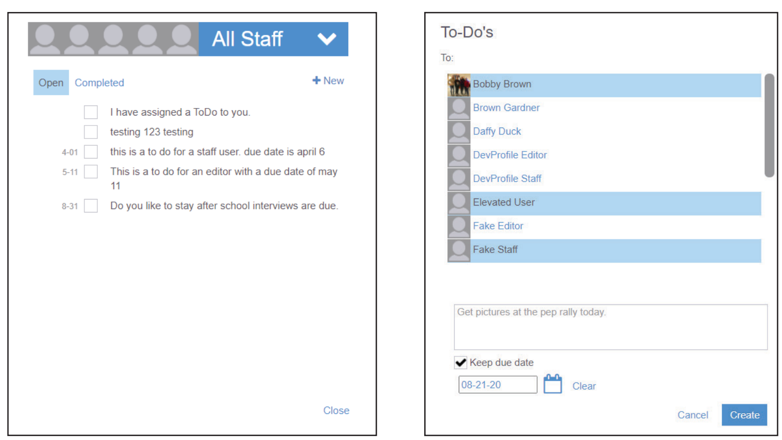
Where are my To-Do's?

A user's To-Do area is visible on the home page as well as along the footer navigation.

To open a new To-Do:

1. Click the **+New** button in the To-Do's section on the home page.
2. All users will be displayed under the To: menu. Scroll through and click to select who will be receiving this To-Do. More than one user can be selected.
3. Type a message into the text field.



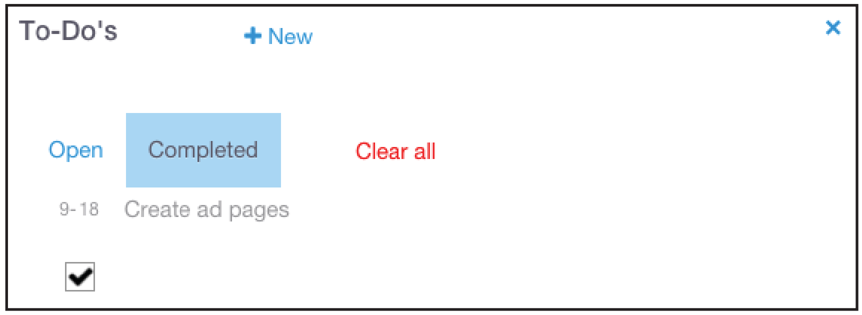


4. If needed, a deadline can be added by clicking the **Add due date** checkbox and entering a date in the **Assign date** field.
5. Click **Create**.

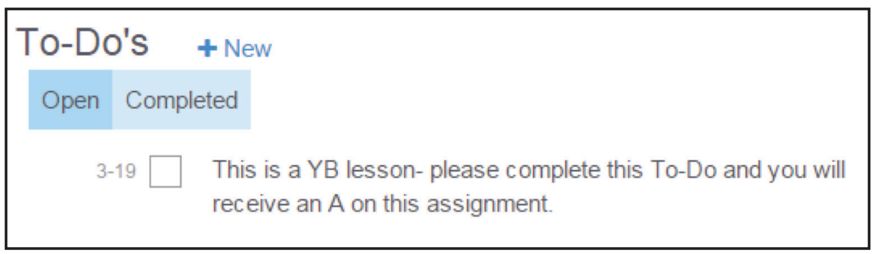
Once created, To-Do's will appear on a user's Yearbook 360 home page under one of two categories, Open or Completed. However, the status of a To-Do can be updated in just a couple of steps.

To mark as Completed:

Click the checkbox next to the completed To-Do. The To-Do will automatically be moved to the **Completed** column.

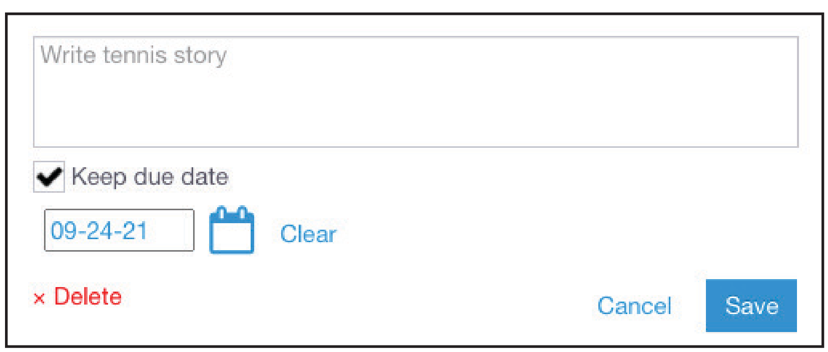


You can view your list of completed To-Do's by clicking on the **Completed** heading.



To delete a To-Do:

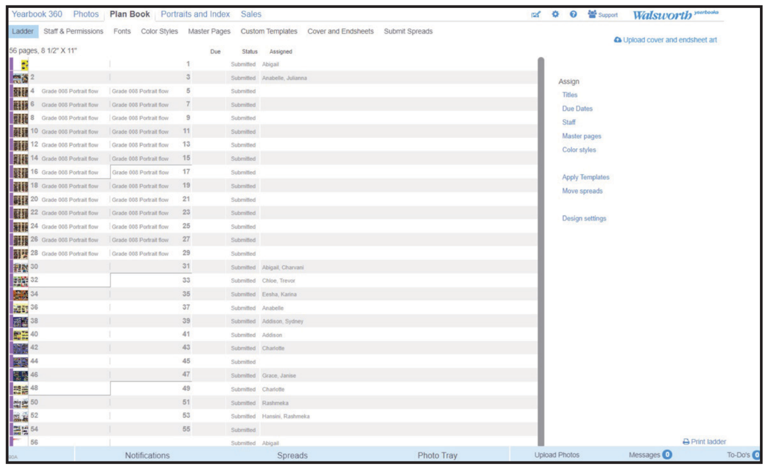
A To-Do can be deleted at any time by clicking the checkbox for the To-Do you would like to permanently delete and then clicking **Delete**.



GETTING ORGANIZED WITH PLAN BOOK

A ladder is an at-a-glance look at how the pages of your yearbook are organized. If you have worked on the yearbook before, you are probably familiar with a ladder poster or diagram hanging on the wall.

Within Yearbook 360, your complete ladder exists within a section called Plan Book. It serves the same basic purpose as that ladder poster, but it can also do much more.



You were first given a snapshot of your ladder on the home page, but Plan Book shows the entire ladder and allows you to do the following organizational tasks:

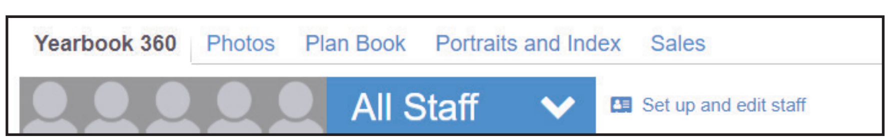
- Set up user accounts and permissions
- Set up your preferences for fonts and color styles
- Enter in titles, due dates and color information for spreads
- Assign spreads to staff members

CREATING USER ACCOUNTS AND SETTING PERMISSIONS

Before the yearbook staff can get started working on pages in Online Design, the adviser must set up user accounts. This is done through the Yearbook 360 Plan Book area.

Use the following steps to create staff accounts.

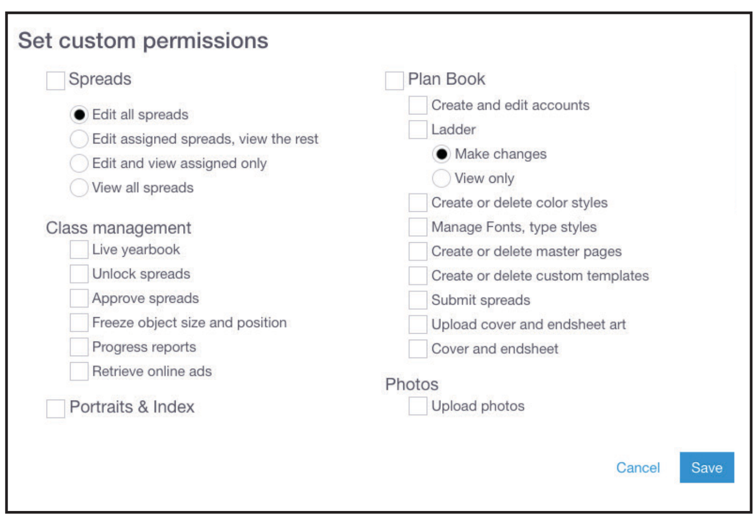
1. Once logged in to Yearbook 360, click the **Set up and edit staff** link near the top left corner.



2. On the Staff and Permissions screen, click the **Create new user** link at the bottom of the page.

3. Fill in the new user's Name, a User ID and Password for them, then click the radio button to set the proper permission level. There are three default permission levels for accounts:
   - **Administrator –** High level of access that can do anything within Yearbook 360; typically for a co-adviser
   - **Editor –** This level can edit any spread and use most management features in Yearbook 360, but they can't change the status of the Adviser or Administrator - level accounts
   - **Staff –** Level typically given to most staff members; they have access to work on their assigned spreads

4. You can choose a custom set of permissions for a user by clicking **Set custom permissions**.



5. Click the Yearbook 360 tab at the top to select the area you would like to set custom permissions for. Then simply click the checkboxes and radio buttons for the areas you would like that user to have permission to access. When you are finished, click **Save**.
6. You can also add a profile photo for the user that will display within Yearbook 360. Click **Add photo** in the upper left corner.
7. Navigate to where the user's mug shot photo is located on your computer and select it. Click **Open**. The photo should now appear in the top left corner.
8. Once all the account information has been filled in, click **Create user** in the lower right corner.

Once a user has been created, a badge for the account should be visible on the Staff and Permissions page under My yearbook staff. These users will also now appear within Yearbook 360.

At the time you create a new user, you will create a user ID and an initial password. The user will be required to change the password when logging in for the first time. If you need to reset the password or delete a user, head back to Staff and Permissions to perform those tasks.

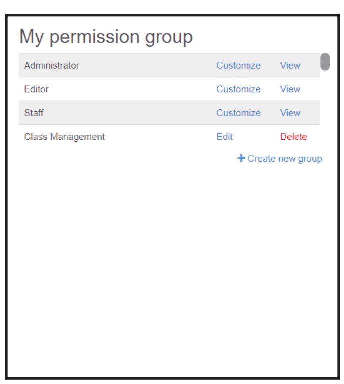
PERMISSION GROUPS

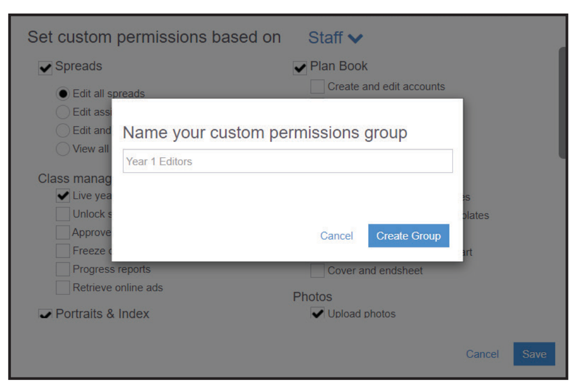
To save time and become more efficient, you can also create custom permission groups which can be applied to groups of staff members or groups of editors.

To create a permission group, simply click the Create new group link located on the right side of the Staff & Permissions screen.

In the pop-up window that appears, use the drop-down menu at the top to select your group, the select the permissions you would like to apply to this group. When you are finished, click **Save**.

You will then be asked to name the group and then click the Create Group button. The new group will appear on the right side of the page under the My permission groups heading.





CHOOSING FONTS

A wide selection of Walsworth's fonts are available to use with the creation of your yearbook, and you can select up to 30 of those fonts within Plan Book.

To choose fonts:

1. Click **Fonts** in the Plan Book task menu.

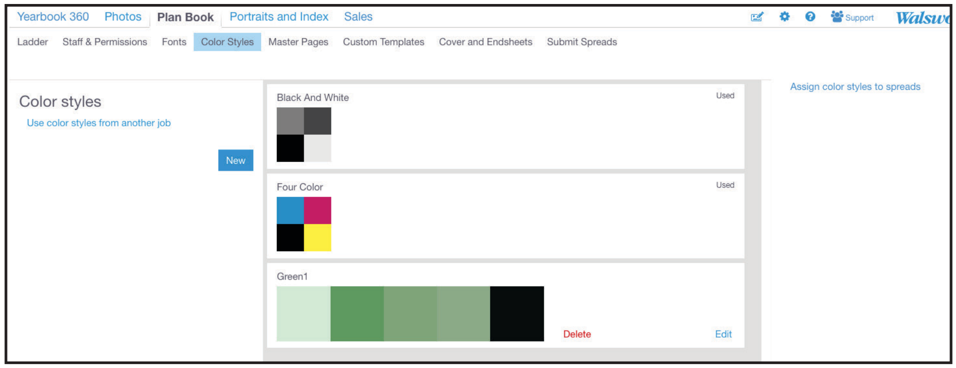
2. Scroll through the list of available fonts in the menu on the left. Click to select a font you would like to use and it will appear in the main list of selected fonts in the middle of the page.
3. You can remove a font by clicking the red x that appears in the top right corner of the font's preview box. Please note that Helvetica and Times, the two default fonts, can't be removed.

SETTING UP COLOR STYLES

Creating custom color styles using combinations of Walsworth's Formula Colors can be helpful when you start designing pages. Assigning color styles will help with book or section continuity.

To create custom color styles:

1. Click **Color Styles** in the Plan Book task menu.



2. Click the **New** button.
3. In the new window that displays, scroll through the color selector on the left to view the different Walsworth Formula Color options. Click to select the colors that you want in the custom style and they will appear in the window on the right.
4. In the text field on the right, enter a name for the custom color style, for example, "Sports section." When you are finished, click **Create**.

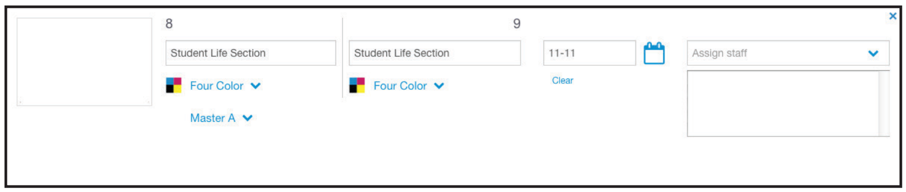
ENTER SPREAD DETAILS

Planning coverage will be one of the first and most important tasks your staff will need to do. You can enter your spread details, including topics, due dates and color information, through your Ladder in Plan Book.

When you click to enter the Plan Book area, you will always arrive on the Ladder in the task menu.

To enter spread titles:
For a single spread:

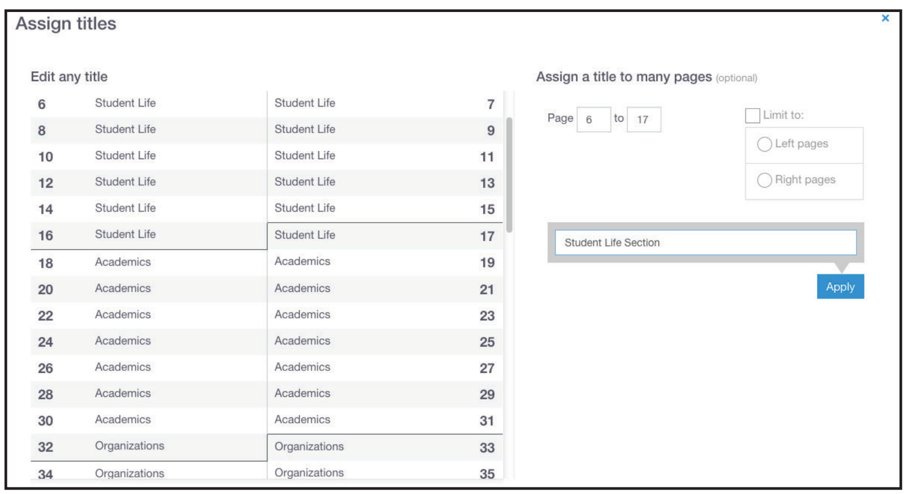
1. Click on a spread within the Ladder preview. The spread details screen will open in a new window.



2. Enter a title for the spread in the **Assign Page Title** text fields, located just below the page numbers. For example, “Opening Spreads,” “Academics Divider” or “Homecoming Football Game.” Information will automatically save as you enter it.
3. When you are finished, close the window by clicking the **x** in the top right corner

For multiple spreads:

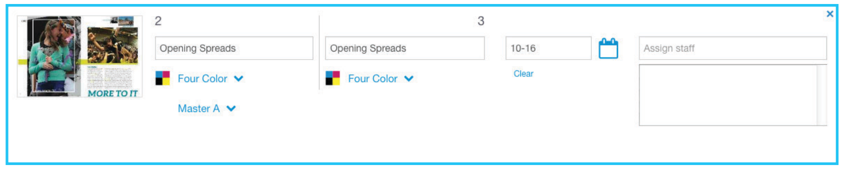
1. Under Assign in the right sidebar, click **Titles**.



2. Enter page numbers in the Start and End fields to select a page range for the pages you would like to label. Or click the radio buttons to choose all left pages or all right pages.
3. Enter a title for the spreads in the **Assign Page Title** text field. Then click **Apply**.
4. You can also choose to click pages in the Ladder preview on the left side of the screen and enter titles in the text field.
5. When you are finished, click **Done**.

To enter deadline dates:
For a single spread:

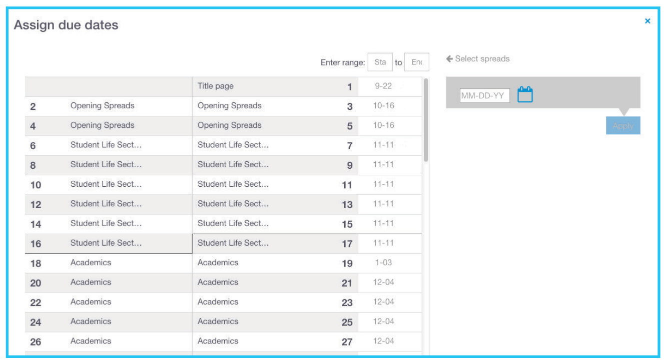
1. Click on a spread within the Ladder. The spread details screen will open in a new window.



2. Use the calendar to enter a date in the due date field.
3. When you are finished, close the window by clicking the x in the top right corner.

For multiple spreads:

1. Under Assign in the right sidebar, click **Due Dates**.



2. Enter page numbers in the Start and End fields to select a page range for the pages you would like to select, or click spreads in the Ladder preview screen to highlight them.
3. Use the calendar pull-down to choose a deadline date. Then click **Apply**.
4. When you are finished, click **Done**.

To enter color information:
For a single spread:

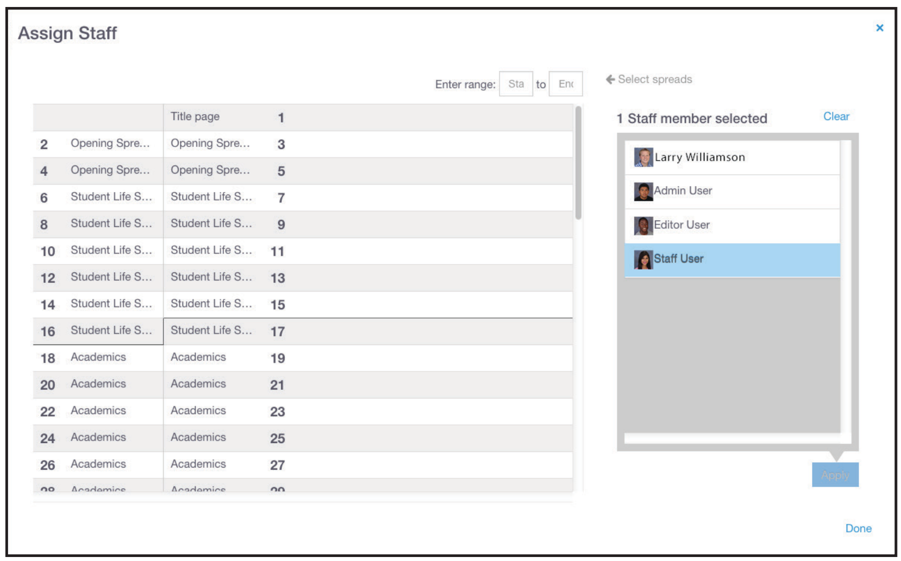
1. Click on a spread within the Ladder. The spread details screen will open in a new window.
2. Use the drop-down menus to choose the color information for your pages, either **Four Color, Black and White**, or a custom color style that has been created.
3. When you are finished, close the window by clicking the x in the top right corner.

For multiple spreads:

1. Under Assign in the right sidebar, click **Color styles**.
2. Enter page numbers in the Start and End fields to select a page range for the pages you would like to select, or click spreads in the Ladder preview screen to highlight them.
3. Click the color style you would like to apply, **Four Color, Black and White** or a custom color style that has been created. Then click **Apply**.
4. When you are finished, click **Done**.

ASSIGN STAFF TO SPREADS

To help with workflow, staff members can be assigned to work on specific spreads in just a couple of clicks.



To assign staff members to spreads:

1. Under Assign in the right sidebar, click **Staff**.
2. Choose the spreads to assign, either by clicking to highlight them in the ladder preview window or entering a page range.
3. In the Select staff menu on the right, scroll through and click to highlight the staff members you want to assign to the chosen spreads. Note that more than one staff member can be selected at a time. When you are finished, click **Apply**.
4. After your assignments have been made, click **Done**.

The Plan Book area is also the home of several other important features, including working with master pages and templates and submitting your spreads once they are finished. Those topics will be covered later in this manual and at **yearbookhelp.com**.

WORKING WITH PHOTOS

One of the first steps in your creative yearbook process will be to get photographers on assignments to document the year.

Once those images are taken, they need to be uploaded and processed. Within Yearbook 360, you will organize your images in the Photos area, which can be found in the main navigation bar.

In this section, you will learn how to:

- Create photo albums
- Upload photos
- Tag images
- Recommend images to a spread or a staff member
- Edit images
- Work with photos uploaded from Yearbook Snap
- Work with Walsworth ClikArt and Backgrounds

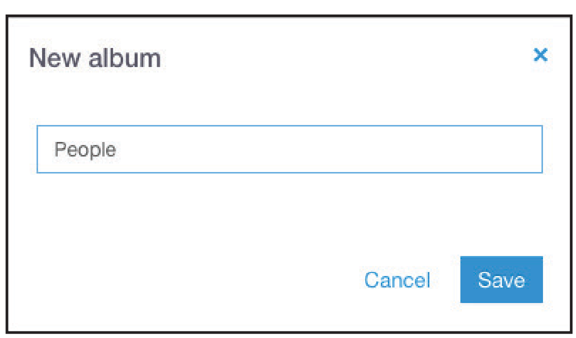
CREATE PHOTO ALBUMS

Yearbook 360's Photos area offers you the ability to create photo albums, which provides the structure to keep your yearbook images organized as the year progresses.

You have the ability to name your photo albums whatever you want, in a way that makes sense for the workflow of your yearbook staff – by date, by event, by section. It's up to you.

To assign staff members to spreads:

1. Once logged in, click Photos in the main navigation. You will then be on the My Photos screen.
2. Click **+New Album**.
3. Enter a name for the photo album in the text field. Click **Save**.



UPLOADING IMAGES

Yearbook 360's image uploading window can always be accessed by clicking the **Upload Photos** link in the footer navigation, which is persistent on every screen.

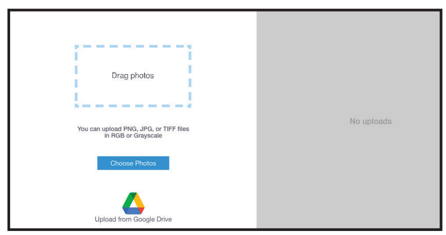
The only file types that can be uploaded are those with a .tif, .tiff, .jpg, .jpeg or .png extension. Grayscale, CMYK or RGB color images can be uploaded.

For the best quality, you should upload photos with a resolution of 300 dpi.

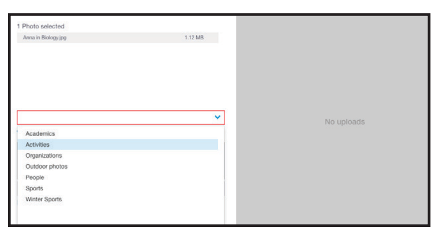
Walsworth has a 25 MB size limit on photos that can be uploaded. Very large image files could take much longer to upload or even time out on your school's network.

To upload images:

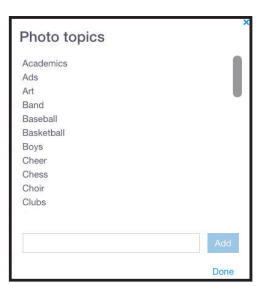
1. Click **Upload Photos** in the footer navigation.
2. 2. In the window that opens, you will have three ways to select images. You can drag and drop photos on to the Drag photos area. Or you can click the **Choose Photos** button. Or you can click to upload from Google Drive.



3. If you click **Choose Photos**, navigate to the location on your computer that has the image or folder of images that you would like to upload and click to select them. If you click to upload from Google Drive, you will be asked to sign in to your Google account.
4. Use the **Choose album** drop-down menu to pick a Photo Album for the images. You can also create a new album for these images by clicking **New album**, naming and saving it. The new album will automatically be selected.



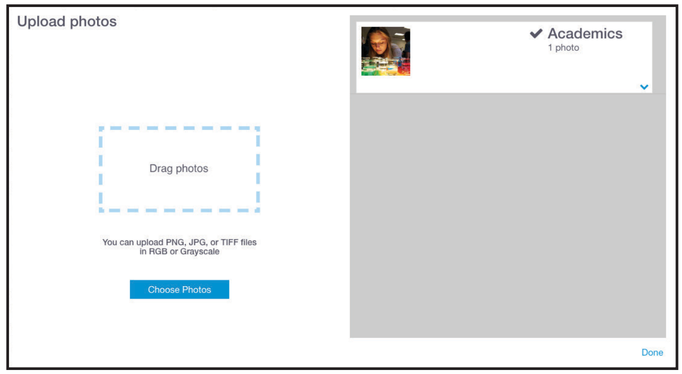
5. If you want, you can type in a topic for the photo in the **Add a topic** text field. Click Photo **topics** to see the current list of topics. Adding a topic to a photo will allow you to search for a photo by topic later.



NOTE

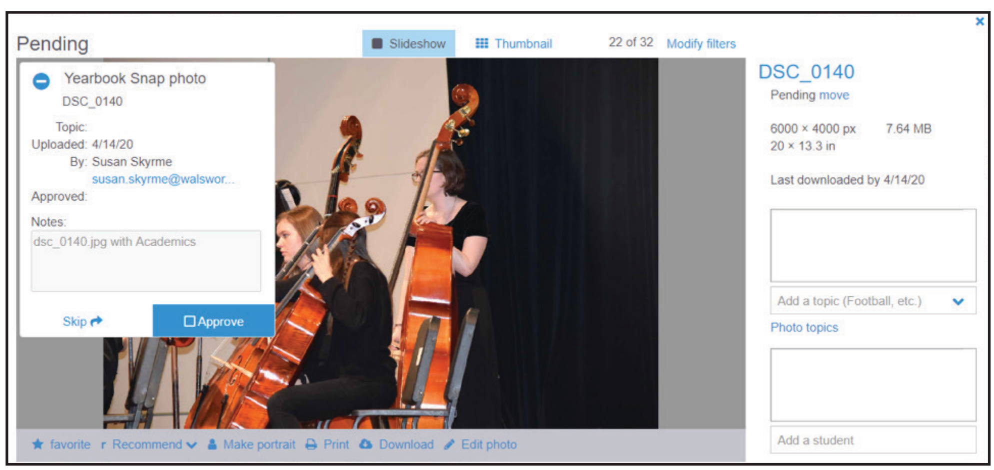
Yearbook 360 allows you to have multiple batch uploads going at one time.

6. Click **Upload**.
7. Progress of the upload will display on the right side and will notify you when it is completed. Then you can choose to start another upload or close the window by clicking the Done window in the lower right corner. Please note that you can't close out of the upload window until all of your images are uploaded or the upload process will stop.



YEARBOOK SNAP

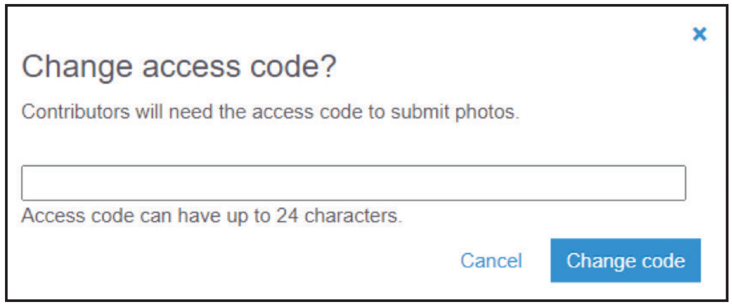
Another way you can acquire photos is through the use of Yearbook Snap, Walsworth's web tool and mobile app, which is available for free in the App Store and Google Play. Yearbook Snap allows your community – students, parents, teachers – to take photos at games, dances or just about any school event there is.



And you can access those images through the Yearbook Snap screen within the Photos section of Yearbook 360.

Access code

Your school community will need to enter an access code whenever they want to use the Yearbook Snap app on their mobile device or desktop through **yearbookforever.com**. You will set that code here in Yearbook 360 on the Yearbook Snap screen by clicking the Access code link in the top right of the page.



The top right corner is also where you will find the link to turn on or turn off photo uploading via Yearbook Snap.

Approving an image

Note that only those with the proper permissions will be able to view pending submissions in the Yearbook Snap area. Typically, it's recommended that permission be restricted to Admins and editors, not the entire staff.

For users with the proper permission, you will see both the Pending and Approved panels on the Yearbook Snap screen. To approve a photo, simply click a thumbnail from the Pending panel and it will open in an image details window. Click the button to Approve, or you can Skip to the next photo.

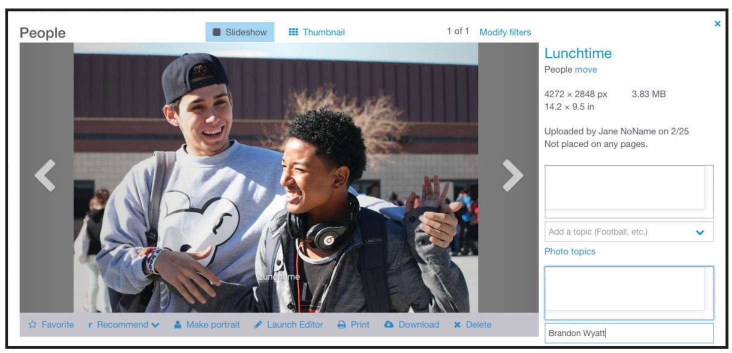
Once a Yearbook Snap photo has been approved, it can be viewed by the entire yearbook staff. By clicking the Yearbook Snap Topics link in the top right of the screen, you can add your own organizational topics to help keep your Snap images organized. From the Approved section, you can also move photos on to specific Photo Albums by clicking to open them and clicking the Move link.

TAGGING IMAGES

The image management tools in Yearbook 360 are geared toward helping improve your coverage and creating an index. You can tag images to identify the students who appear in the photos. To avoid needing to merge student records later, it is recommended that you not tag until after the Portrait CD/DVD has been processed and uploaded to your account.

To tag an image:

1. Click **Photos** in the main navigation.
2. If photos have been uploaded, you will see them organized by photo album under **My Photos** or **Photo Albums** areas. Scroll through the images and click to select an image you want to tag.
3. The photo you selected will open in a new window, showing the image details screen in Slideshow view. Click on the **Add a student** text field in the lower right corner.
4. Type the name of the student who appears in the photo. As you type, matching name from your student list will populate and appear in a drop-down menu. When the correct name appears, click to select it. The name will appear in the window above, and the image is now tagged.



RECOMMENDING IMAGES

Once images are uploaded and sorted into photo albums, you can recommend them to be used on specific spreads or by specific staff members.

Although all uploaded images are available for use when editing pages, the extra step of recommending can be useful since it places images with the spreads they're best suited for and with the users who need them.

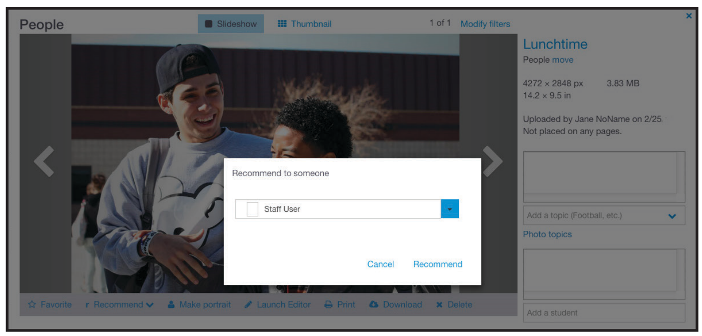
To recommend an image for a spread:

1. Click **Photos** in the main navigation.
2. If photos have been uploaded, you will see them organized by photo album under **My Albums**. Scroll through the images and click to select an image you want to recommend.
3. The photo you selected will open in a new window, showing the image details screen in Slideshow view. Click **Recommend** in the menu below the photo.

4. In the drop-down menu, choose **Recommend for spread**.
5. In the new window, click in the ladder preview to select the spread(s) you would like to recommend this image for. You can choose a single spread or multiple spreads. When you are finished, click **Recommend**.

To recommend an image for a staff member:

1. Click **Photos** in the main navigation.
2. If photos have been uploaded, you will see them organized by photo album under **My Albums**. Scroll through the images and click to select an image you want to recommend.
3. The photo you selected will open in a new window, showing the image details screen in Slideshow view. Click **Recommend** in the menu below the photo.
4. In the drop-down menu, choose **Recommend to someone**.
5. In the new window, use the drop-down menu to select the staff member you would like to recommend the image for. When you are finished, click **Recommend**.



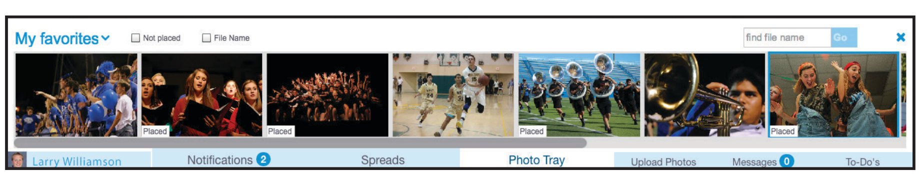
USING THE PHOTO TRAY

The **Photo Tray**, located in the footer navigation, always provides you quick, easy access to your images when working in Yearbook 360.

The Photo Tray is accessible from anywhere, but it will most commonly be used while you are working in the Online Design Page Editor in order to add photos to your spreads.

Here's a quick look around the Photo Tray's capabilities:

- Once you click to open the Photo Tray, by default you will see thumbnail images of photos that have been put in your My Favorites album. You can select different thumbnails using the drop-down menus on the left.
- The drop-down menus allow you to pull up photos that have been recommended for you by choosing **Recommended for me**, or scrolling through your full list of photo albums in a new window by selecting **Other albums.**



- Once you have placed an image on a page, it will be indicated on a Photo Tray thumbnail with the word "Placed" in the lower left corner. If you only want to see thumbnails of images that have not yet been placed on the page during your searches, you can click the **Not placed** checkbox.
- By clicking the **File Name** checkbox on the upper left side of the tray, thumbnails will be sorted into alphabetical order.
- You can also search for photos by file name using the **Find file name** field on the right side of the Photo Tray. If your search results don't bring up what you're looking for, simply hit **Clear** to return to the default.
- For any image, you can hover over the thumbnail and see any tags that have been placed on the photo, as well as a Details link that opens a larger version of the photo in the image details window.

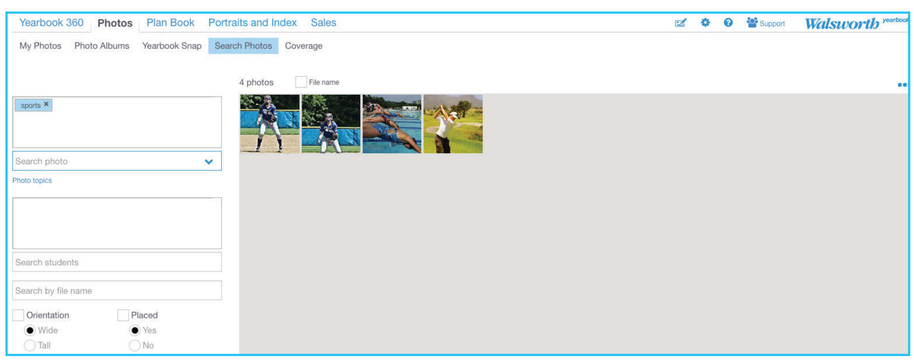
SEARCHING FOR PHOTOS

Yearbook 360 allows you to organize your uploaded images in Photo Albums, label them with Topics and Tag them with student names.

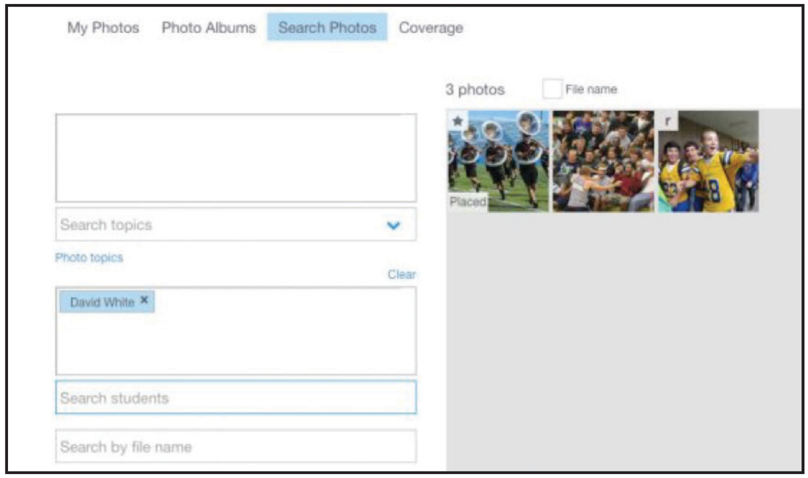
There are a couple of different ways you can use these features to search through your photos, which will be useful since your staff will likely accumulate hundreds of images as the year progresses.

To search for an uploaded photo:
There are two places within the **Photos** area you can search: **Photo Albums** and **Search Photos**. In both locations, the search area is on the left side of the page. You can use all of the steps below or only the ones you need.

1. Use the **Search Topics** drop-down menu to choose a photo Topic to search for. Once selected, the Topic will appear in the frame above the menu. It can be deleted from the search by clicking the x next to the name. You can choose more than one Topic for a search.



2. Use the **Search Students** field to search for photos that have been tagged with a student name. Simply type the student's name in the field and it will populate, as long as it is a name that appears on your student list.



3. If searching on the Photo Albums page, you can search for a specific Photo Album name by typing it in the **Search by album** name field.
4. If searching on the Search Photos page, you can search for a specific image name by typing it in the **Search by file name** field. You can also click the File name checkbox and your images will be listed in alphabetical order by name.
5. The **Search Photos** page also has additional radio buttons that allow you to refine the search based on orientation, whether an image has been placed on a page, if it has been recommended and if it has been tagged.

The thumbnail results of your search will display on the right side of the page.

COVERAGE

Yearbook 360 offers a useful tool to help you keep track of which students are being featured in the yearbook, and how often, within the Photos area.

Once your portraits have been uploaded (which you will learn more about is Section 6), you can click Coverage in the Photos sub-menu and you will be taken to the Coverage screen. Once there, you should see your student portraits in a grid.

Each time you run your index (see section 7) or tag a student on a page (see earlier in this section), it will be recorded here in Coverage. Just click on a student's thumbnail to see how often they have appeared so far in the yearbook.

GETTING TO KNOW THE ONLINE DESIGN PAGE EDITOR

Once you are ready to begin building your yearbook spreads, it's time to learn all about the engine that makes Yearbook 360 run – the Online Design Page Editor.

This section will cover all the Page Editor basics, including:

- How to launch an Online Design session
- All the primary menus, tools and palettes within Online Design
- Adding text to a page
- Adding images to a page
- Editing imagess

LAUNCHING A PAGE EDITOR SESSION

There are multiple ways to open one of your spreads in an Online Design session.

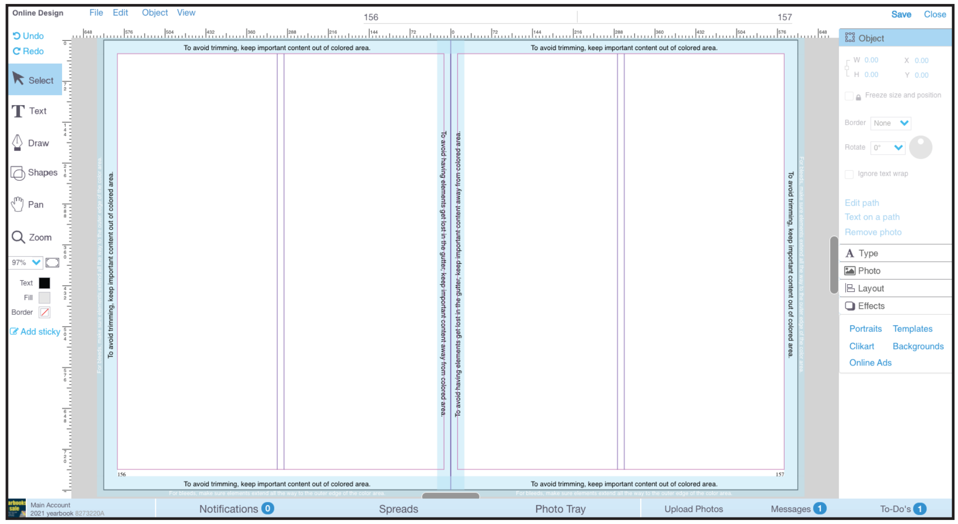
- On the home page, click the boxes on the left side of the Ladder. As long as you have permission to edit the spread, it will open in Yearbook 360. Once you have begun work on a spread, a thumbnail preview of those pages will appear in those boxes.
- When working with the Ladder in the Plan Book section, when you click the thumbnails on the left side, a spread's status window will open. You can then

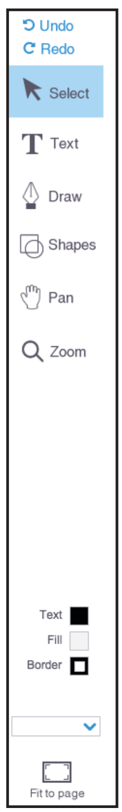
  click the **Edit Spread** button to open the spread in Yearbook 360.

- The footer navigation includes a **Spreads tray**, which pulls up thumbnails of all your spreads. It also includes a menu that allows you to sort by deadline date and a link to open a window with thumbnails of all your spreads. Clicking the thumbnail of a blank or in-progress spread in the tray will open it directly in Yearbook 360.
- On the home page, click the **View All Spreads** button located at the bottom of the Ladder. Thumbnails of all your spreads will open in a new window. Clicking the thumbnail of a blank or in-progress spread will open it directly in the Page Editor.

ONLINE DESGIN TOOLS AND MENUS

As you begin working on pages, you need to become familiar with Online Design's tools, menus and workspace.





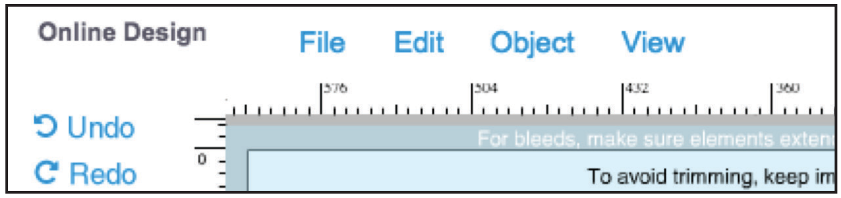
Tools:

Online Design's main tools appear on the left side of the screen. Here is a description of each one and how it can be used in yearbook production.

- **Undo/Redo –** Remove, or repeat, the most recent action you've taken on the page
- **Selection tool –** Select an item on the page and move it around, or resize it
- **Text tool –** Create text boxes by clicking and dragging across the page; this tool must also be selected to type or paste text
- **Draw tool –** Draw free-form objects on the page, either angled or curved
- **Shapes tool –** Opens a fly-out menu with squares, circles, polygons and starbursts; allows you to drag and drop the shapes on to the page
- **Pan tool –** Allows you to pan around the page simply by clicking, holding and dragging
- **Zoom tool –** Zoom in closer to an area of the page

Menus:

Many of Online Design's basic commands can be found in menus along the top of the screen.



FILE >

The File menu contains the common commands to **Save** and **Close** your spread. S**ave as Custom Template** allows you to take an attractive spread that you would like to re-use, such as a divider page, and make it a template. **Make PDF** gives you the option to produce a low-res PDF version of your spread for quick proofreading or a hi-res PDF for final proofing.

EDIT >

The commands under the Edit menu come in handy once you start working with type or start moving objects around on the page. **Undo/ Redo** can be found here. **Cut, Copy, Paste** and **Delete** work just as they do in most word processing programs. However, in Page Editor, these functions only work with objects, not text. **Check spelling** will scan the spread for spelling errors.

OBJECT >

Options under the Object menu allow you to **Group** and **Ungroup** objects, as well as Lock and **Unlock** objects. **Convert Text to Shape** is a popular design effect that allows you to turn your text into an object.

VIEW >

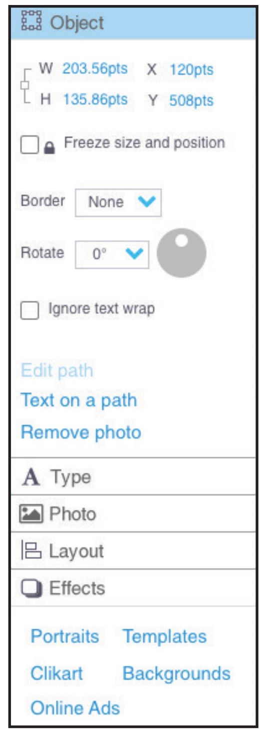
The View menu will adjust the visual settings as you work around a spread. **Fit to page** always adjusts the view back to 100% if you have zoomed in or out. **Show Grid** and **Show Guides** display different graphical aids to help you while designing. **Show Bleed Bars** shows the area outside of the page shaded in blue, called the "bleed." Text should not enter the bleed bar area or it may be trimmed off during production, while objects intended to bleed off the spread must extend to at least the outer edge of the bleed bar. **Set Columns and Rows** allows you to adjust the number of column guides displayed on the page.

ONLINE DESIGN PALETTES

The Online Design Page Editor has five palettes that appear along the right side of the screen and control more advanced settings and adjustments.

Object palette

Whenever an object, such as a photo or a shape, is selected, this palette will be open. The Object palette allows you to adjust the width and height of a shape or add a border. From this palette, you can also add text on a path and freeze the location of image frames and text boxes.



Type palette

If you are working with copy within a text box, the Type palette is where you can adjust font, type size, leading, kerning or add a drop cap.

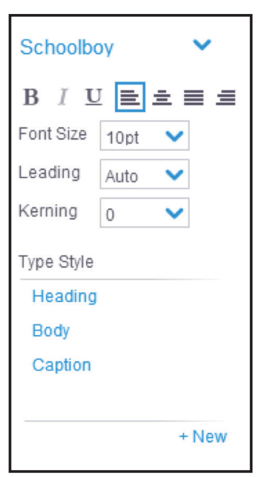
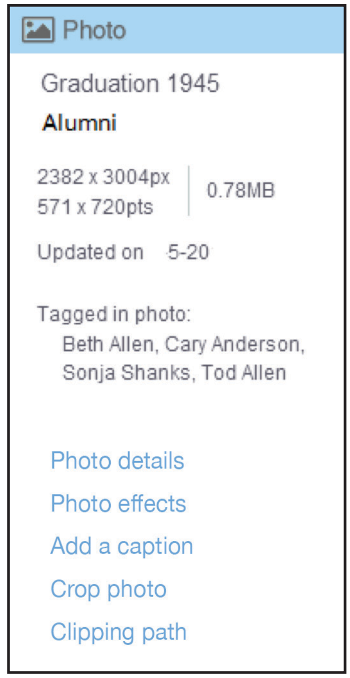


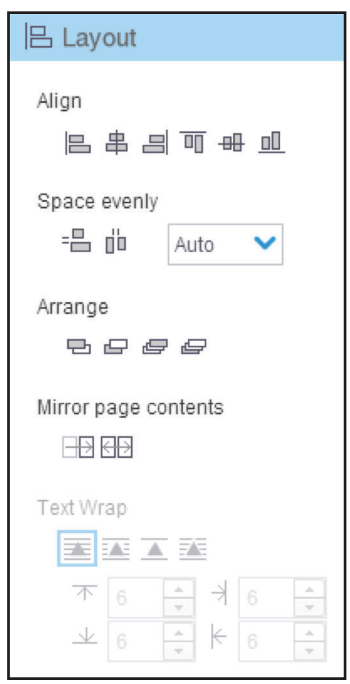
Photo palette

While working with a photo on the page, the Photo palette gives you a quick, easy way to see the photo's details and launch into the Photo Effects photo editor to make adjustments if needed. From this palette, you can also work on more advanced techniques like a clipping path.



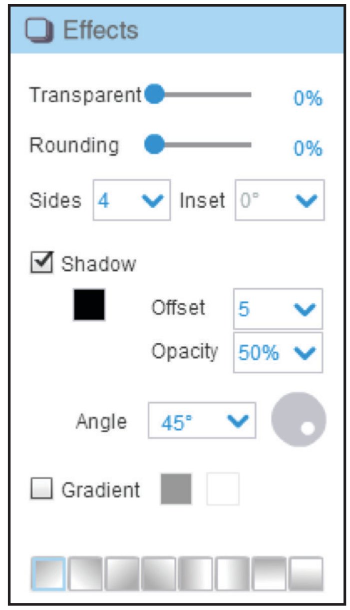
Layout palette

The Layout palette contains tools that align and distribute objects evenly on the page. Text Wrap is also located here.



Effects palette

The Effects palette allows you to apply graphic effects like drop shadow, transparency and gradients to your page elements.

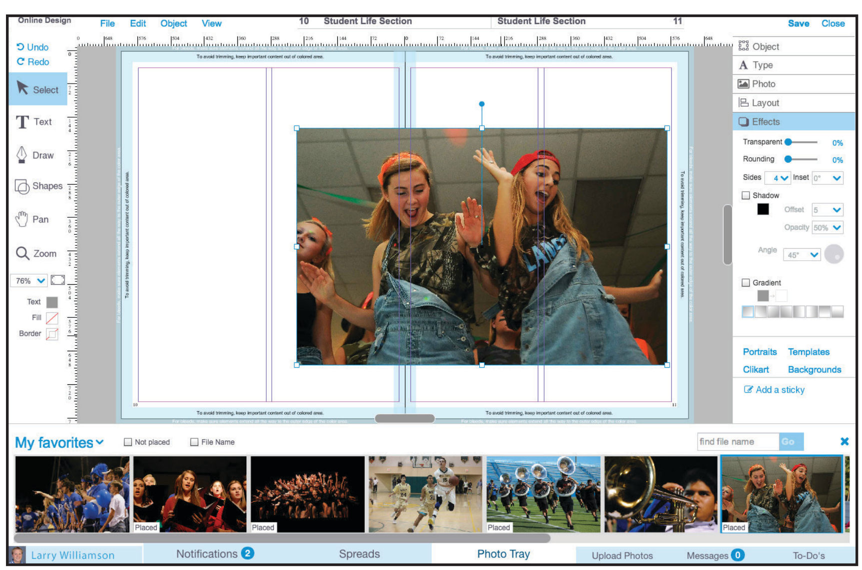


ADDING PHOTOS TO A PAGE

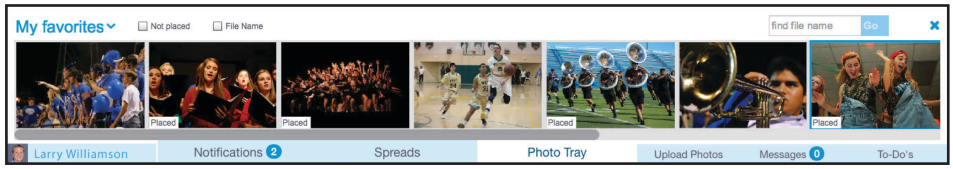
In Section 3, you learned how to upload images into Yearbook 360. Once you start working in Online Design, adding images to your pages can be done in only a few steps by using the Photo Tray, which is located in the footer navigation at the bottom of the screen.

To add a photo to a page:

1. Open a spread in a Online Design session.
2. Click **Photo Tray** in the footer navigation.

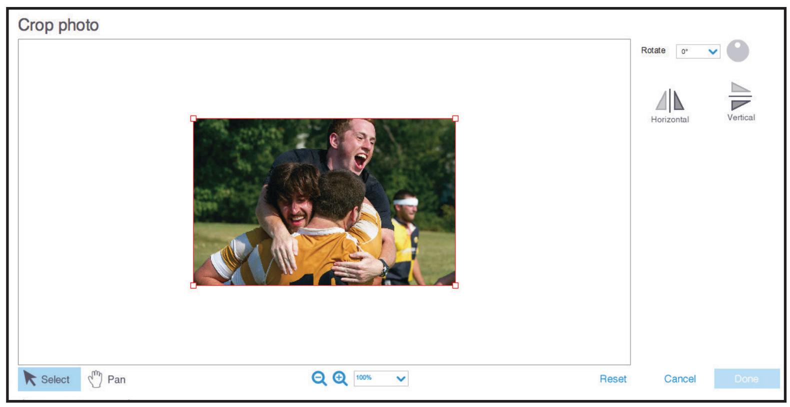


3. Thumbnails of your images will display in the Photo Tray. Use the Photo Tray menus to sort photos by whether they've already been placed on a page and to find images recommended for you or the spread. You can also search by topic, tagged student name and file name.



4. Once you find the image you would like to place, drag and drop it from the tray on to the page. If you have already created image windows on your spread, drag an image over the window to highlight it, then drop it into that window.

5. Images placed in windows will likely need to be cropped. To crop an image, double-click the image or select **Crop Photo** in the Photo palette.



EDITING YOUR PHOTOS

Updates to photos in Yearbook 360 are essentially done in two ways – via the Photo Editor and using Photo Effects.

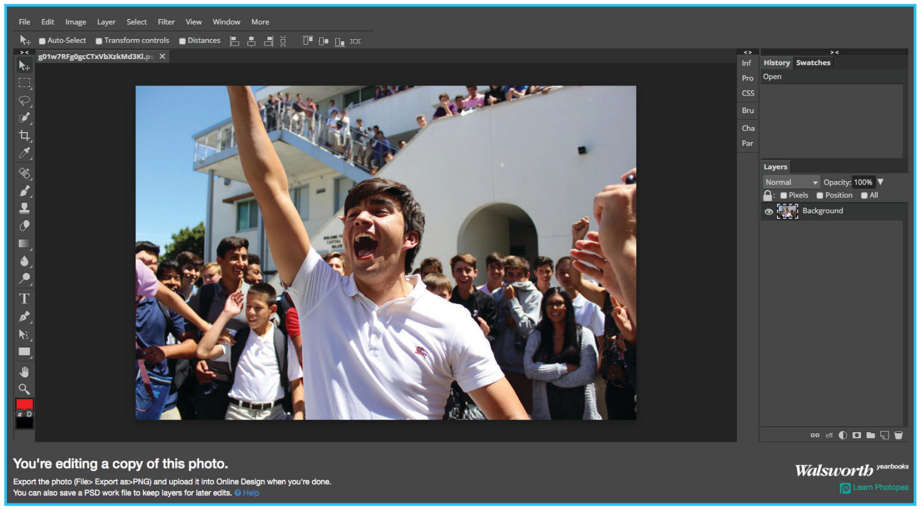
Photo Editor

You can access the Photo Editor from the Photo details screen of any image or you can click the Photo Editor icon in the right corner of the Yearbook 360 home page.

If you are in the Photos area, you can get to the Photo details screen by double-clicking on any uploaded image. If you are working in the Online Design Page Editor, you can reach the same place by clicking on Photo details in the Photo palette. From there, use the steps on the next page.

To edit an image using Photo Editor:

1. From the Photo details screen, click **Edit photo**.
2. The Photo Editor will open in a new window. As the message at the bottom of the window explains, you will be editing a copy of the photo that you will be able to upload back into Yearbook 360 when you are done.



3. You can edit the photo using the tools on the left side of the screen, the menus at the top and the palettes on the right side of the screen. Full definitions of the entire Photo Editor workspace can be found here.
4. Once you are done working with the image, you can go to **File > Export as**, then choose the format. In most cases, you should use JPG unless your image is a transparency, then use PNG.
5. Choose the dimensions you want to save the new, edited photo in. Click **Save**.

6. The new, edited photo will be saved on to your computer and you will need to upload it back into Yearbook 360.

PHOTO EFFECTS

Photo effects are a simple, fun tool that can be used within Online Design.

To edit an image using Photo Editor:

1. Once a photo is placed on the page while working in Online Design, click on it using the Select tool.
2. In the Photo palette on the right side of the screen, click the **Photo effects** link.
3. The Photo effects window will open, with a drop-down menu of all the adjustments that can be applied to your photo. They include:
    - Auto Brightness
    - Auto Color
    - Auto Contrast
    - Blur
    - Brightness
    - Cartoonify
    - Contrast
    - Fill Light
    - Gamma
    - Grayscale
    - Improve – Indoor
    - Improve – Outdoor
    - Oil Painting
    - Red Eye
    - Saturation
    - Sepia
    - Sharpen
    - Vibrance
4. Select the effect you want to apply, then click **Add**. For most of the effects, there will be a sliding scale that allows you to adjust the level.

5. As effects are added to an image, they will appear in a list within the Photo effects window. You can remove the effect at any time by de-selecting the checkbox next to the effect's name.

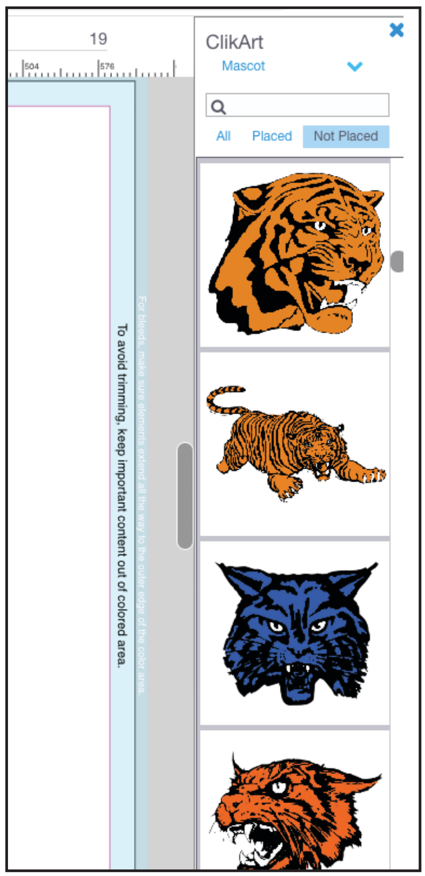
6. When you are finished editing a photo, you can close the Photo effects window by clicking the x in the top right corner.

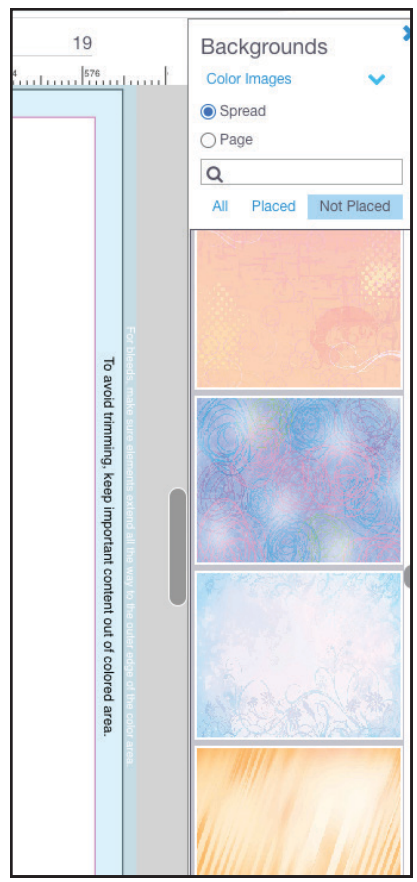
ARTWORK

Two other groups of images that will already be present in Yearbook 360 the first time you log in are ClikArt and Backgrounds. You can find links for them in the Page Editor on the right side of the screen just below the palettes.

ClikArt is a collection of pre-designed line art, grayscale and color artwork graphics that you can use on your pages. The Backgrounds are Walsworth's professionally designed background images that are already properly sized to fit on the page.

You can scroll through the ClikArt and Backgrounds in Artwork and download the images for your pages.





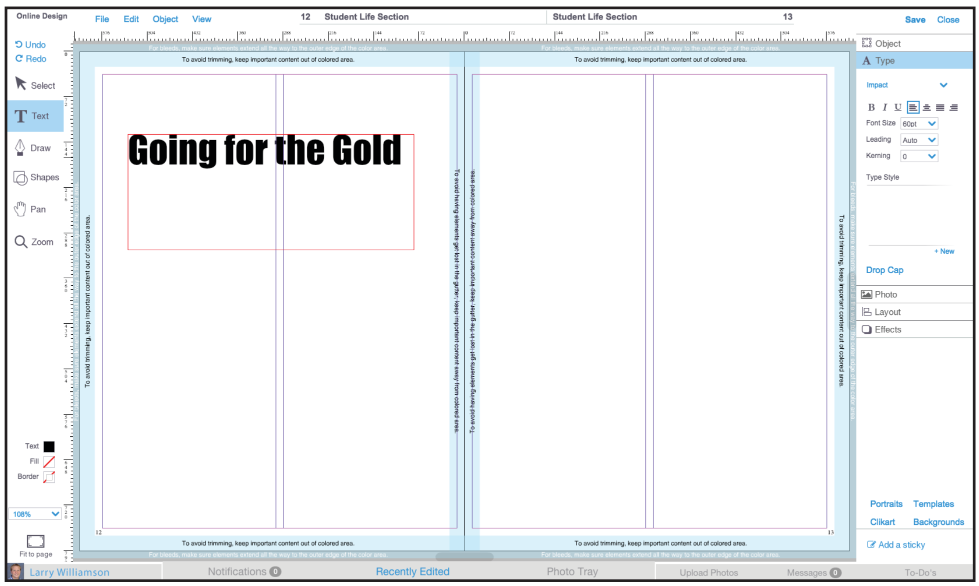
ADDING TEXT TO A PAGE

Headlines, captions and articles are all fundamental pieces of a yearbook spread. Follow these steps to add copy within Online Design.

To add text to a page:

1. Open a spread in an Online Design session.
2. Click the **Text tool** in the Tool menu on the left side of the screen.
3. Create a text box on the page by clicking and dragging your pointer arrow. Once you release, your text box will be created with a blinking cursor inside to indicate where text will appear. Note that you can also make a shape a text box by clicking inside with the Text tool.

New! When you are in a text box on the Page Editor page, you can now move the cursor forward five spaces by hitting the Tab key.



For fun tips and tricks you can do with your photos and text in Online Design's Page Editor, visit **yearbookhelp.com** throughout the year.

COVER AND ENDSHEET CREATION

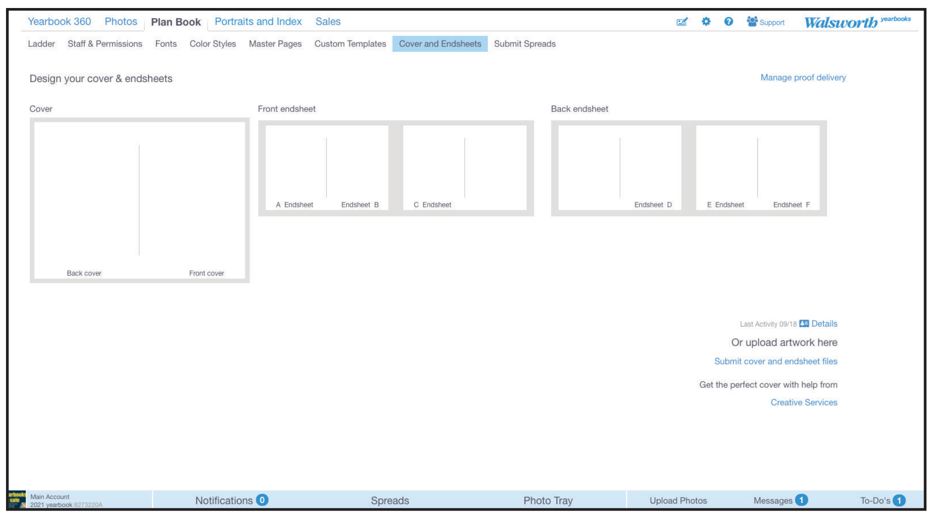
Your staff might have an amazing idea or inspiration for the yearbook cover. In Yearbook 360, they will be able to create the cover and endsheets using Online Design functionality.

The Cover and Endsheets area within Plan Book lets you work on your cover and endsheets the same way you work on any other yearbook spread.

To create a cover or endsheet:

1. Go to the Plan Book area. Click on **Cover and Endsheets**.
2. To work on the cover, click on the Cover thumbnail. An Online Design session will open, allowing you to design your cover.
3. To work on the endsheet, click on the Front endsheet or Back endsheet thumbnail. An Online Design session will open, allowing you to design your endsheet.

Once your cover or endsheet has been completed, it must still go through the proof process before it can be submitted.



Only go through these submission steps once you have put your cover and endsheets through final proofing.

To submit a cover or endsheet:

1. On the Cover and Endsheets screen, click the **Submit cover and endsheet files** link.
2. In the window, select the button for what you are submitting: Cover or Endsheets.
3. Upload your file(s) by dragging and dropping, or clicking Choose files and navigating to where they are on your computer.
4. Select the correct radio button for the type of file you are uploading. Click **Submit**.

APPLYING TEMPLATES AND MASTER PAGES

Once you have made all the decisions associated with planning your yearbook and you have reviewed the basics of the Yearbook 360 Page Editor, it's time to start building spreads. Many yearbook staffs start with templates.

A template is a standard design created or selected by the staff to appear throughout each section of the book. Staffs use templates to build unity and consistency in theme and design. In Yearbook 360, templates are managed in the Plan Book area. This section of the manual will outline:

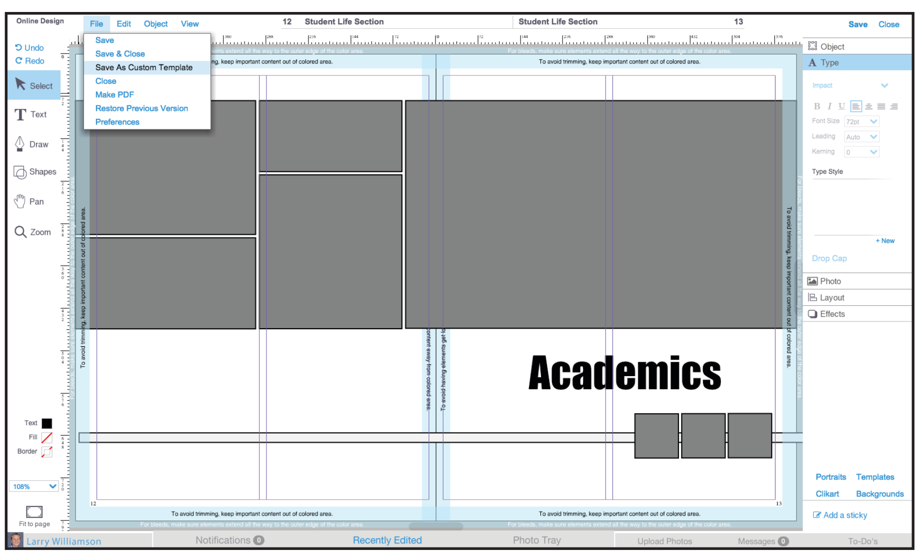
- Creating custom templates
- Assigning templates to pages
- Working with master pages

CREATING A CUSTOM TEMPLATE

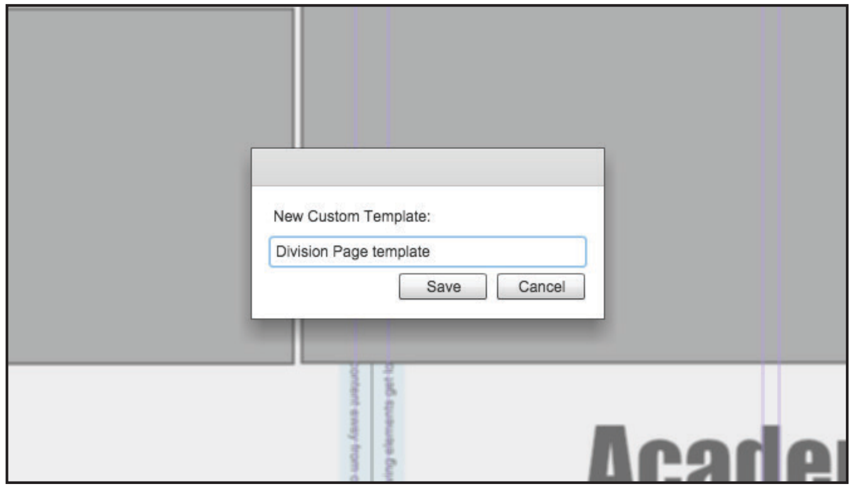
If your yearbook staff is fortunate enough to have designers who want the blank slate and free rein to create their own templates, Yearbook 360 allows them to convert an original spread into a custom template within Online Design.

To save a spread as a custom template:

1. Open a spread in an Online Design session.
2. When your template is complete and ready to be saved, go to **File > Save As Custom Template**.



3. Name your custom template in the text field, then click **Save**. Your new custom template will now appear in the Custom Templates area within Plan Book.

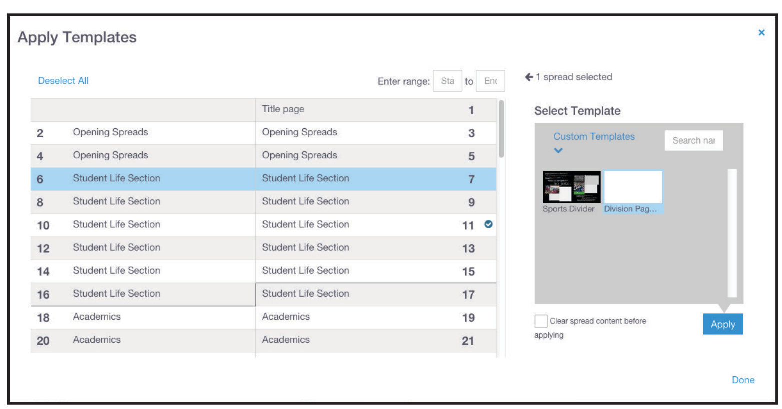


ASSIGNING TEMPLATES

The process of assigning templates to your yearbook pages is done in Plan Book. Within Plan Book, you will be able to see thumbnails of all the pre-designed templates Walsworth makes available, as well as any custom templates you created in Yearbook 360.

To assign a template:
For a single spread:

1. Go to the **Plan Book** section.
2. From the Ladder view, click **Apply Templates** in the right sidebar. Note that templates can also be applied to spreads in the Plan Book > Custom Templates screen.
3. In the new window that opens, click to select a spread within the Ladder preview.
4. Use the drop-down menus to search for the template you want to assign. You can scroll through thumbnails for Walsworth's pre-designed templates or any custom templates you have created. In the text field, you can also search for templates by name. Click to highlight the template you choose.
5. Click **Apply**.



For multiple spreads:

1. Go to the **Plan Book** section.
2. From the Ladder view, click **Apply Templates** in the right sidebar.
3. In the new window that opens, enter page numbers in the Start and End fields to select a page range for the pages you would like to select, or click spreads in the Ladder preview screen to highlight them.
4. Use the drop-down menus to search for the template you want to assign. You can scroll through thumbnails for Walsworth's pre-designed templates or any custom templates you have created. In the text field, you can also search for templates by name. Click to highlight the template you choose.
5. Click **Apply**.

CREATING AND EDITING MASTER PAGES

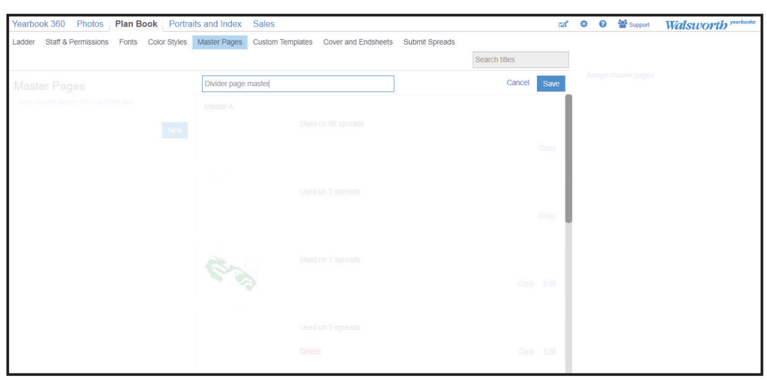
Much like templates, a master page is a document intended to serve as a building block for your yearbook. It can be used to set up elements you want to remain consistent throughout, like folios, thematic design elements and backgrounds.

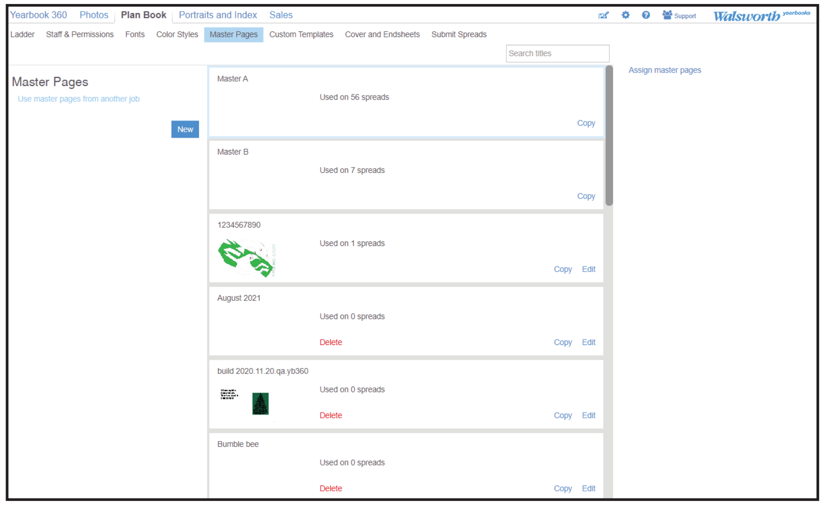
Using master pages allows for design consistency and time savings. You set up repeating elements once, rather than on every file.

All Online Design users should note that two master pages, called Master A and Master B, already exist the first time you log in. Master A contains only page numbers and will automatically be assigned to every page in your yearbook, for those users who never get around to using master pages. Master B is a quick and easy master page that can be assigned, which contains only page numbers and topics pulled directly from your titles on the page ladder.

To create a new master page:

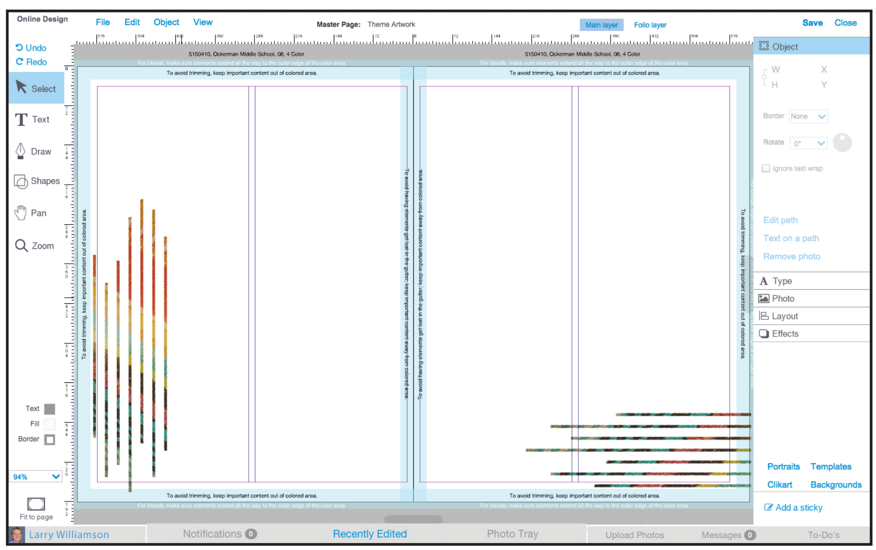
1. Go to the **Plan Book** section.
2. Click **Master Pages** in the Plan Book task menu.
3. Click the **New** button.
4. In the text field at the top of the screen, enter a name for your master page Then click **Save**. The new master page will now appear in the list.





To edit a master page:

1. Go to the **Plan Book** section.
2. Click **Master Pages** in the Plan Book task menu.
3. Find the master page you want to edit in the list. Then click **Edit**.
4. The document will open in a master page session in Page Editor. Once you complete your work, go to **File > Save & Close**.



It's important to note that while working on a master page session in Online Design, the main layer and the folio layer are indicated in the top right corner of the screen. Any time you insert folio layer items, which includes page number and page topic information and folio artwork, they are always arranged on top of all other items on the master page. This way the folio can never be inadvertently covered by another item on the page.

ASSIGNING MASTER PAGES

Once you have created master pages, applying them to your spreads only takes a few easy steps.

To assign a master page:
For a single spread:

1. Go to the **Plan Book** section.
2. Click **Master Pages** in the Plan Book task menu.
3. Click **Assign master pages** in the right sidebar.
4. In the new window that opens, click to select a spread in the Ladder preview.
5. Under **Select Master Page** on the right, click to highlight the master page you want to assign.
6. Click **Apply**.

For multiple spreads:

7. Go to the **Plan Book** section.
8. Click **Master Pages** in the Plan Book task menu.
9. Click **Assign master pages** in the right sidebar.
10. In the new window that opens, enter page numbers in the Start and End fields to select a page range for the pages you would like to select, or click spreads in the Ladder preview to highlight them.
11. Under **Select Master Page** on the right, click to highlight the master page you want to assign.
12. Click **Apply**.

WORKING WITH PORTRAITS

The portraits section will always be among the most-read pages in your yearbook. Creating the portrait pages will be an important part of your process.

Before you can edit or place portrait images onto your pages, you will need to work with your school photographer to have your portraits taken and a portrait CD/DVD created, according to the proper specifications.

The portraits and information on your portrait CD/DVD will then need to be uploaded. You can do that by following the instructions in this section. Once your portraits have been processed and uploaded into Yearbook 360, you will be able to work with them in the Portraits and Index area of the site. After student record edits are complete, you can begin the process of tagging candid photos.

In this section, you will learn how to:

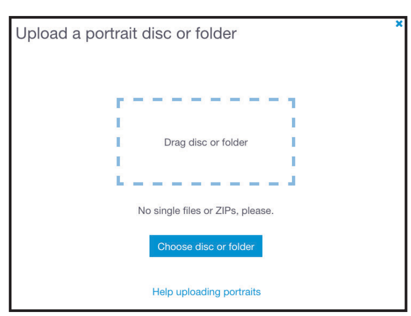
- Upload your portraits
- Edit student information
- Customize the style and adjust the settings of your portraits
- Flow your portraits on to a spread(s)

UPLOADING PORTRAITS

Users who have been given the proper permission to do so will be able to upload portrait images quickly and easily within the Portraits and Index section. Use the steps below.

To upload portrait images:

1. In Yearbook 360, go to the Portraits and Index section. Click **Portraits** in the sub-menu.
2. In the lower right corner of the screen, click the **Upload a portrait disc or folder** link.
3. The window that opens will give you two options to start the upload: you can click **Choose disc or folder** and navigate to the location on your computer where your portrait folder is and select it. Or you can drag and drop your portrait disc or folder over to the window.



4. Once an upload begins, a status bar will display showing you the progress of your upload. Your upload might be stopped for reasons such as missing or duplicate images, at which time you will be notified with a specific error message.

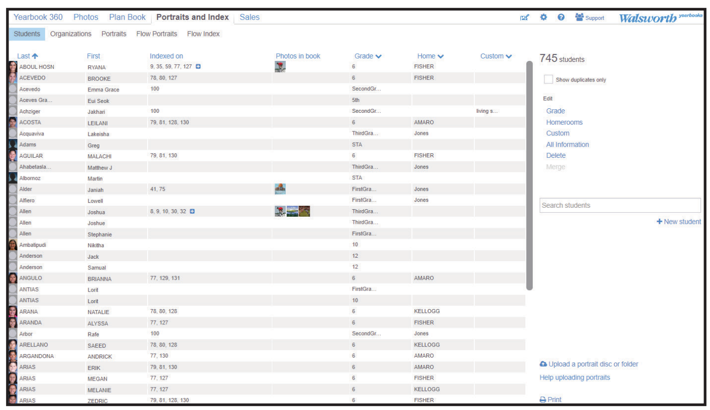
5. When the upload is complete, the confirmation screen will display to let you know how many student records and portraits have been uploaded. Click **OK**.

Once your portraits have been uploaded, the images and student information should be visible under the Students and Portraits tabs in the Portraits and Index section.

EDITING STUDENT INFORMATION

After your portraits have been uploaded, they are ready for your use. Then, when you click to enter the Portraits and Index section from the main navigation, you will see a list of your students with a thumbnail portrait image, first and last name, and grade.

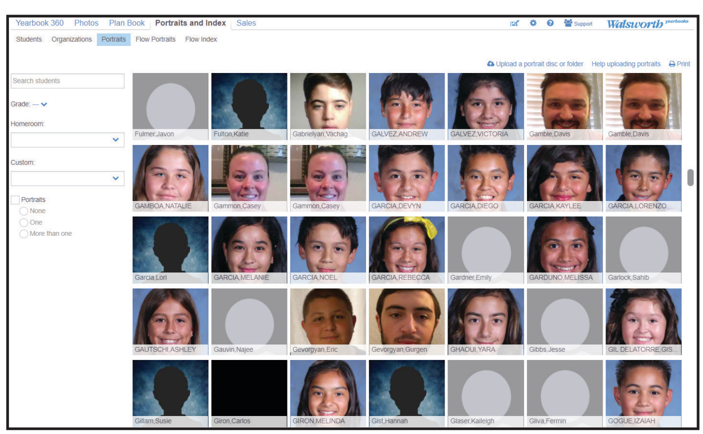
Any of this information can be edited for an individual student or a group of students. You can also search for duplicates and entries can be merged.



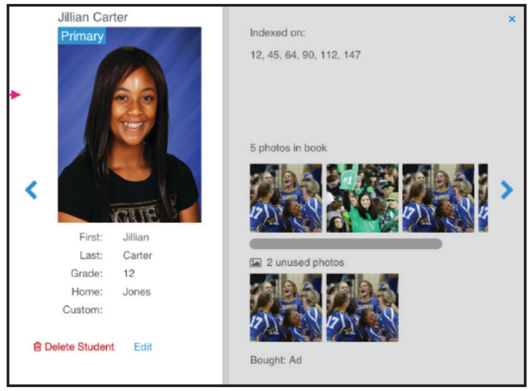
To edit student information:
For a single student:

1. Go to the **Portraits and Index** section.

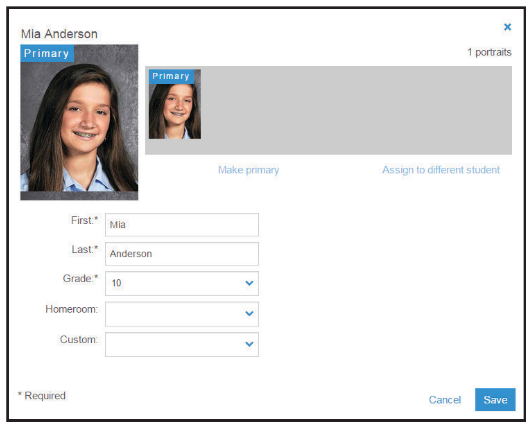
2. From either the Students or Portraits screens, scroll through the student list to find the entry you would like to edit. Click the student name.



3. The student's entry will open in a new details window. Click **Edit**.



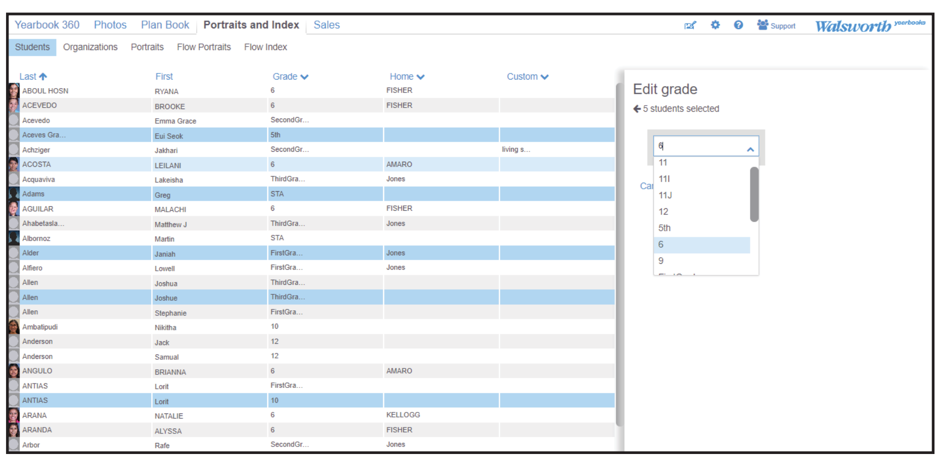
4. Make changes using the text fields and drop-down menus. Note that you can enter a new Homeroom for a student by typing it in, and that Homeroom will then appear in the drop-down menu.



5. When you are finished, click **Save**.

For a group of students:

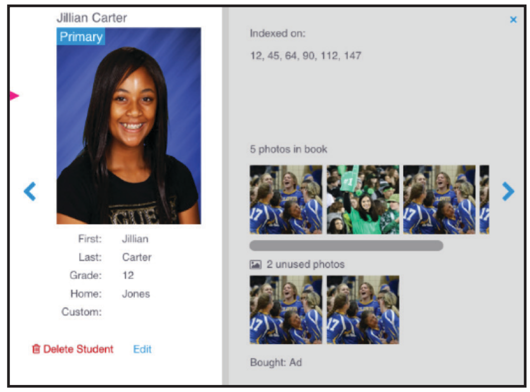
1. Go to the **Portraits and Index** section.
2. From the Students menu, click the link in the right sidebar that yoplan on updating for multiple students: Grades, Homerooms or Custom.
3. Scroll through the student list and click to select the students whose information you are updating.



4. In the text field on the right, enter the new information you are updating for the selected students. Then click **Apply**.

To delete a student:

1. Go to the **Portraits and Index** section.
2. From either the Students or Portraits menu, scroll through the student list to find the entry you would like to delete. Click the student name.
3. The student's entry will open in a new details window. Click **Delete Student**.



4. You will be asked to confirm that you want to permanently delete the student's portrait and information. If you do, click **Delete**. Note that deleted student records can be restored by typing the deleted student's name in the Search Students text field in the Students task area.

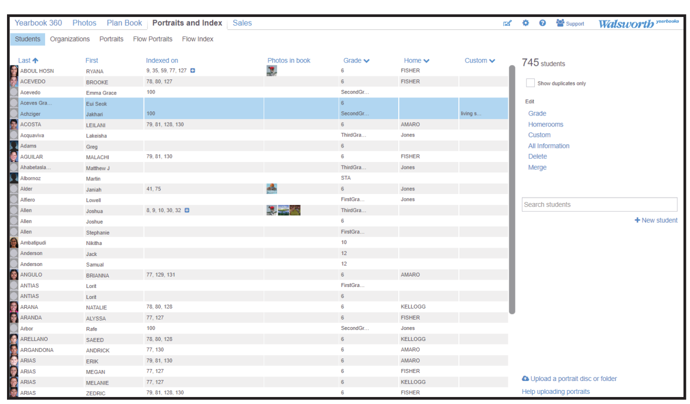
Students who had portraits retaken can appear twice in your portrait list. In this case, you will want to search for duplicates, select the correct photo and merge the student information.

To search for duplicates:

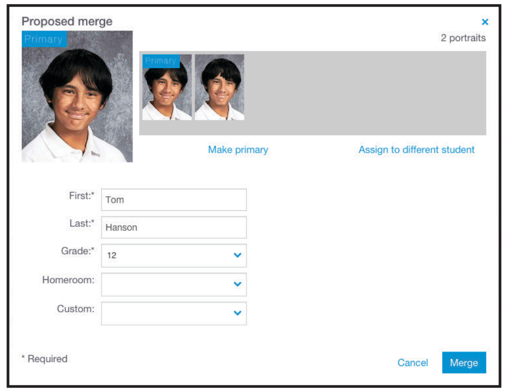
1. Go to the **Portraits and Index** section.
2. From the Students menu, click the **Show duplicates only** checkbox on the right side of the page. Duplicate listings will display.

To merge two students:

1. After you have performed a search for duplicates, click to select the two entries you want to merge.
2. Click **Merge** in the right sidebar.



3. In the details window, click on the correct portrait image. Then click **Make Primary**.
4. Make any additional edits needed using the text fields and drop-down menus. When you are finished, click **Merge**. The two previous student entries will now be combined into one.

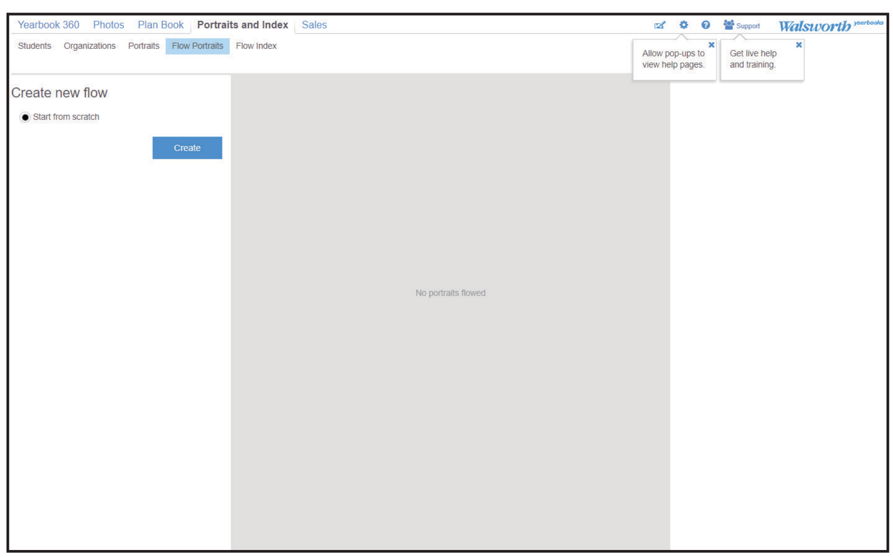


THE PORTRAIT FLOWING PROCESS

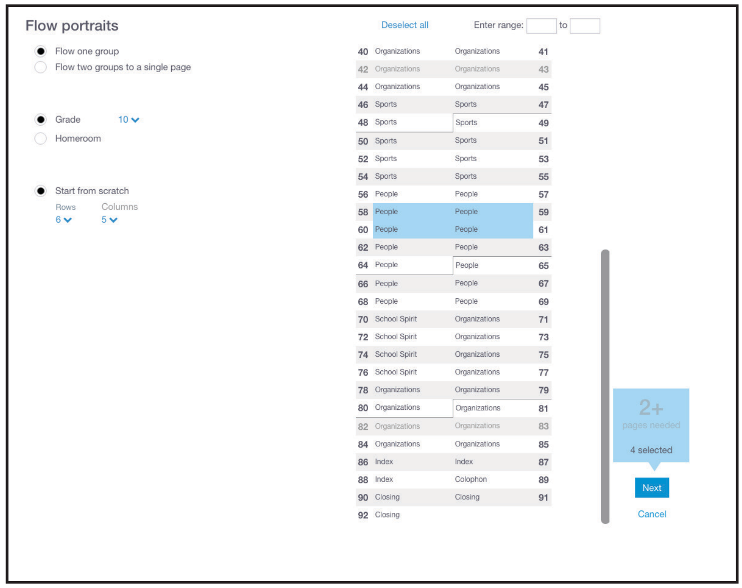
Once you are finished editing your portrait information and you are ready to place your portrait images on the page, the portrait flowing process in Yearbook 360 provides you with a variety of customization options and settings.

To flow your portraits on to a page:

1. Go to the **Portraits and Index** section.
2. Click **Flow Portraits** in the task menu.
3. You will be given two options. If this is the first time you have placed portraits, the **Start from scratch** radio button will be selected. Otherwise, you have the option to select the **Base on** radio button and pre-select the same settings as one of your previous portrait flows from the drop-down menu. Then click **Create**.



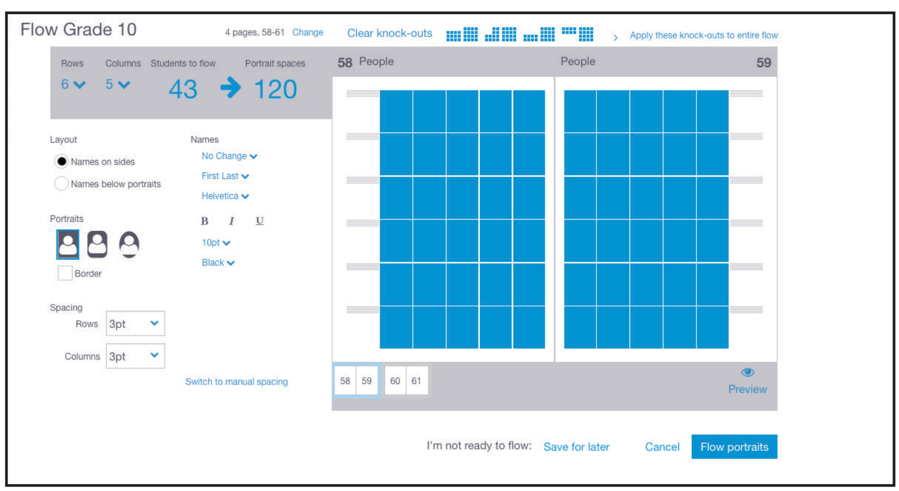
4. Use the radio buttons on the left to select whether you are flowing one or more groups, and which group you want to flow (by grade, homeroom, etc.).



5. Use the drop-down menus on the left to choose the number of rows and columns you want to appear on your portrait pages. Based on the selections you make, Yearbook 360 will calculate how many pages will be needed for your portrait flow. That number will appear in the lower right corner.

6. Once you know how many pages are needed, click to select your portrait spreads in the ladder preview on the right. When you have selected enough pages, the blue Next button will become active. Click **Next**.

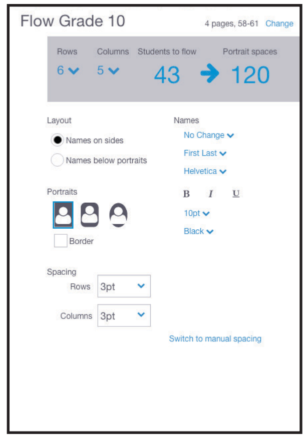
7. You will now be able to make adjustments to the layout and text. Under **Layout**, click the radio buttons to select portrait names to appear on the side or below images.



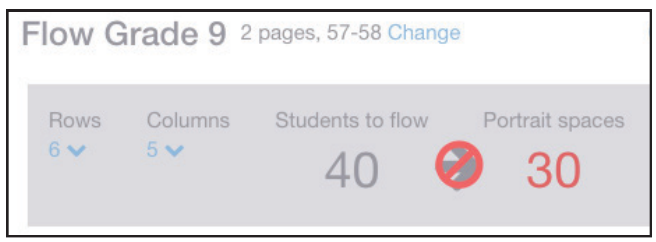
NOTE

Each setting you choose will automatically update the preview screen, as well as the "Students to flow" and "Portrait spaces" numbers in the upper left corner. If any setting causes the Portrait spaces to go lower than the Students to flow number, you will be given a warning and asked to update your settings or add an additional portrait page.

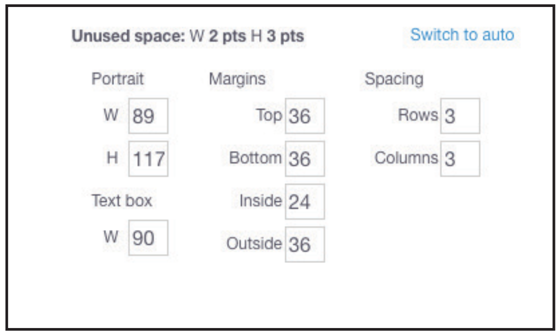
8. Under **Portraits**, click to select the shape of your portrait images. Click the checkbox if you want to put a border around the images.



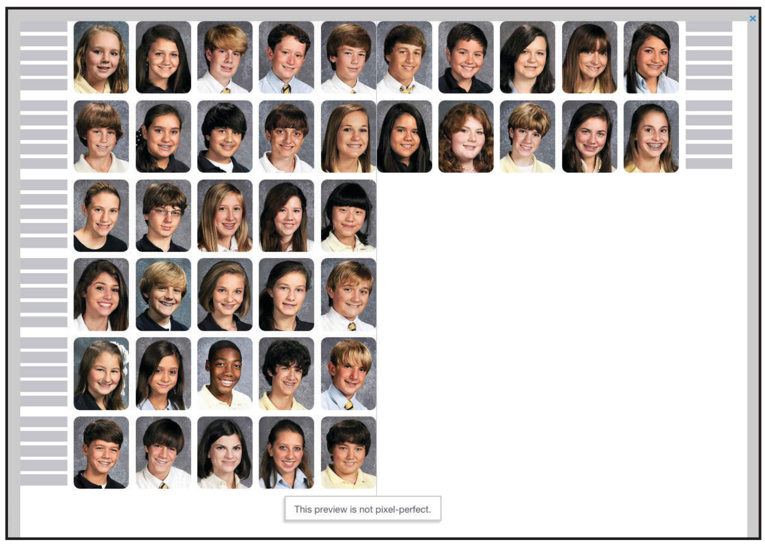
9. Under **Names**, use the drop-down menus to apply text changes.
10. Under **Spacing**, adjust the amount of white space between images. By default, there will be 3 pt. of space placed between rows and columns unless the setting is adjusted.
11. At the top of the window, you can scroll through the different design options for applying knock-outs (or pockets of white space) to your pages. Click to select one. Remove it by clicking **Clear knock-outs**. You can also apply knock-outs to your pages by clicking the individual image windows in the preview screen.



If you prefer to build your pages using manual settings, click the Switch to manual spacing link near the bottom of the window. This will allow you to set the portrait width and height, text box width, as well as page margins and spacing to your specific settings. All numbers entered are in points. A red box around a field means you have entered a number too big for your current page size.



12. To view what your portrait page layout will look like at any time, click the **Preview** button in the lower right corner.



13. When your pages are set the way you like, click **Flow portraits**.

WORKING WITH THE INDEX

Right after picking up the yearbook on distribution day, most readers will turn to the index and look for their name to find their photos. Next, they'll search for all their friends.

That's why your yearbook's index will be some of the book's most important pages. Fortunately, indexing within Yearbook 360 will be a stress-free process, thanks to the site's auto-indexing capabilities that are constantly working behind the scenes as you work on pages. This section will cover:

- How to add names of organizations to your index list
- Matching names to your index while working on pages
- Flowing your index on to the page

As you work on the index, you will always be able to see the current status of it in the Portraits and Index area. For both students and organizations, as names get matched to pages, the page numbers will appear on the same line as the name under the **Indexed on** column.

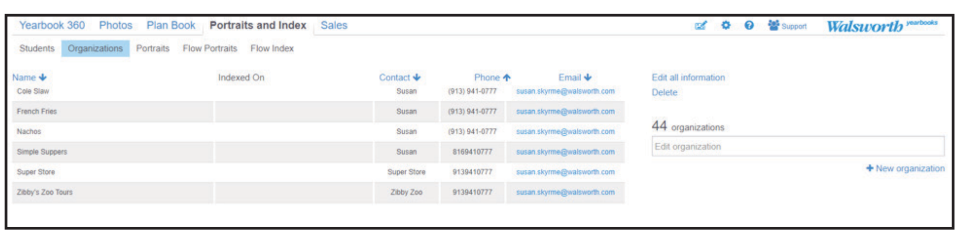
ADDING ORGANIZATIONS TO THE INDEX

As outlined in Section 6, your student list will appear in the Portraits and Index area once you have submitted your portrait CD/DVD to Walsworth and it has been processed.

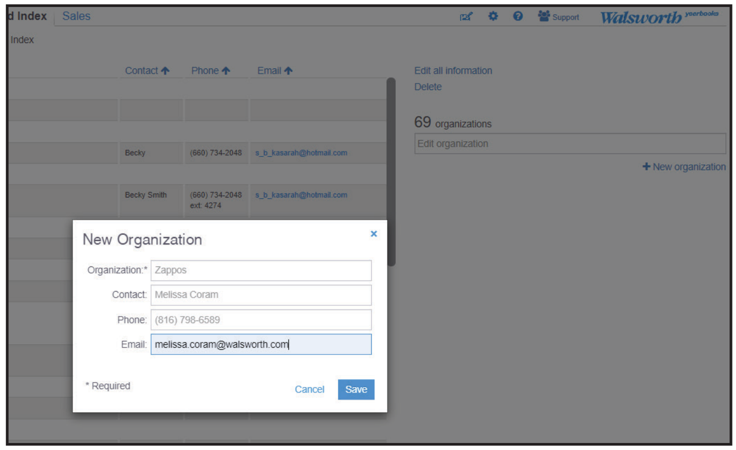
However, for organizations that you want to appear in the index, you must add the names manually.

To add an organization name to the index:

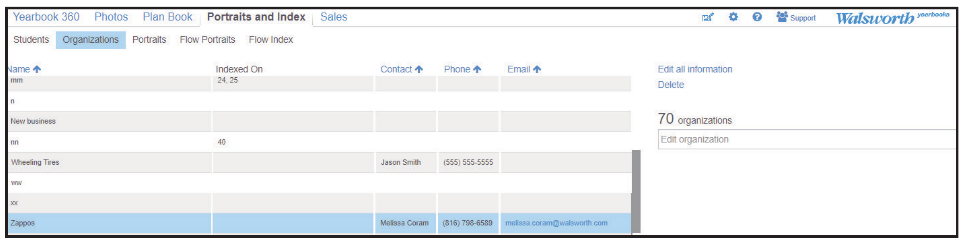
1. Go to the **Portraits and Index** area.
2. Click **Organizations** in the task menu.



3. Click **+New Organization** in the right sidebar.

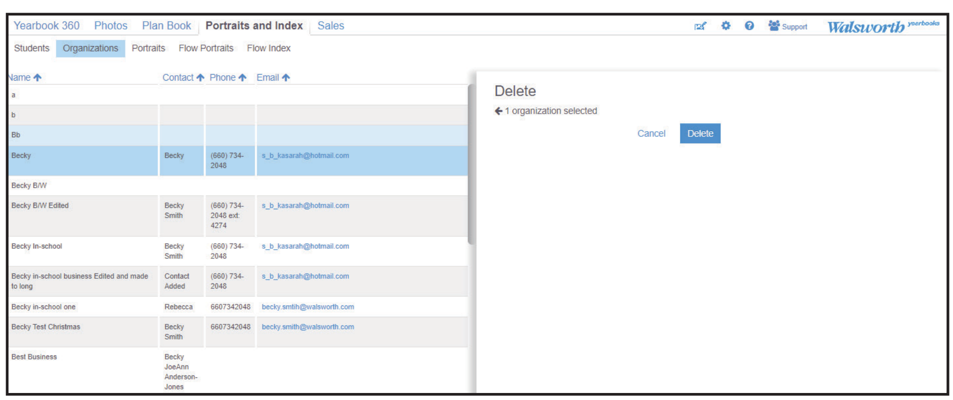


4. Type the name of the organization in the text field. Click **Save**. The name will now appear in your list of organizations and can be matched for your index.



To delete an organization name from the index:

1. Go to the **Portraits and Index** area.
2. Click **Organizations** in the task menu.
3. Click to highlight the organization(s) you want to delete.
4. Click **Delete** in the right sidebar.
5. A message will display asking you to confirm that you want to delete the organization(s). If you do, click **Delete** again.



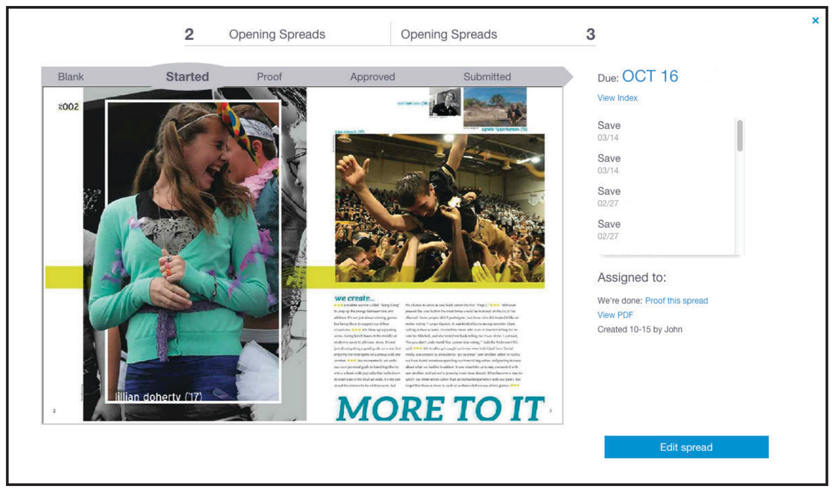
INDEXING FROM SPREADS

The best part about the indexing process within Yearbook 360 is that it is working all the time. While you are working on spreads in Online Design, adding text and tagging images, your pages are being scanned for index matches.

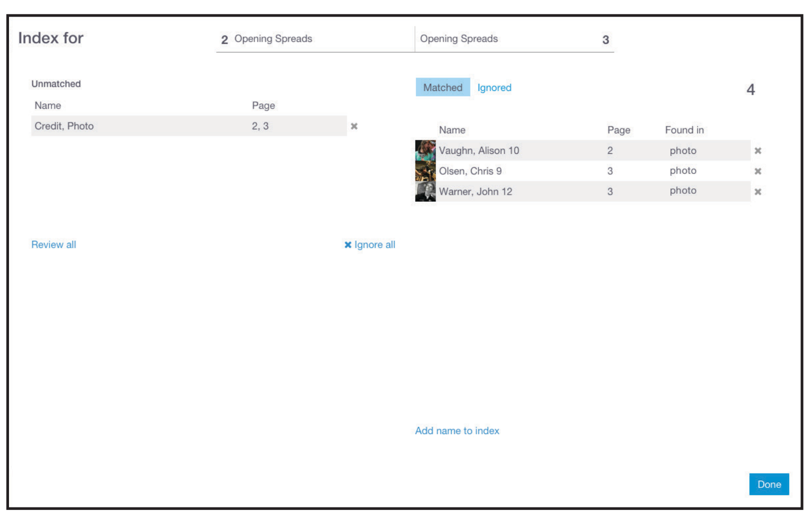
Then when you are finished working, you will have the opportunity to review all the potential matches on your spreads and decide if you want to add them to the index. Once you have begun working on pages, use these steps below to review and edit your index as your work progresses.

To review/edit your index information:

1. When you are finished working on a spread in Online Design, go to **File > Save & Close**.
2. The spread details window will appear. Click **View Index** in the upper right corner.



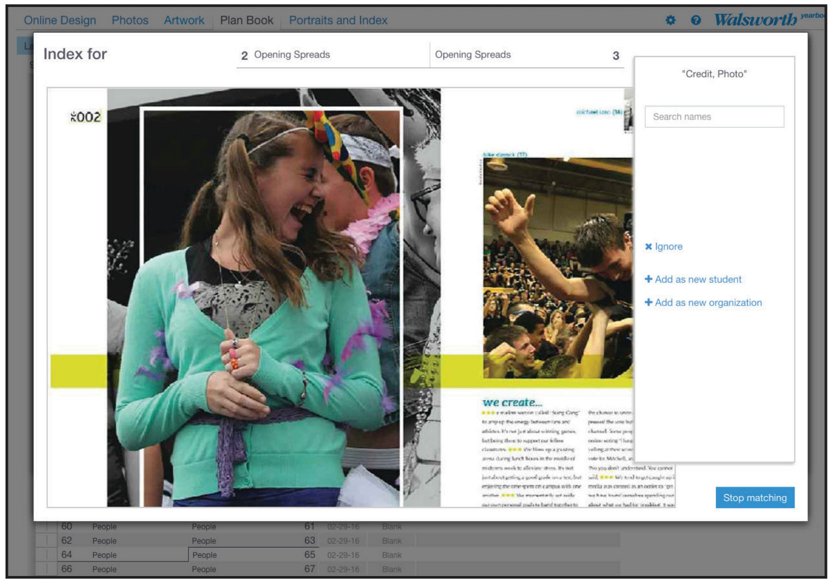
3. In the new Indexing window that opens, you will see the list of proper names that have been identified as potential index matches on the spread. Student or organization names that have been matched to your lists will display on the right under the **Matched** column, along with the page they were found on and where they were found (text or photo).



NOTE

Any name you have deleted and moved over to the Ignored column can be brought back. Simply click the **Ignored** heading, find the listing you want to retrieve and click the Refresh icon located to the right of the line. That name will be moved back to the Unmatched list, and you will be able to review it again.

4. Names that appear under the Matched column will appear in the index. To remove them, click the **x** at the end of the row and the name will be moved to **Ignored**.
5. Any two words in a row on a spread in upper case will be flagged as a possible match during a scan. These proper names that were scanned but didn't match your student or organizations list will appear on the left side of the window under the **Unmatched** column. To review one of these names, click on an entry.



6. A new window will open allowing you to add or delete the name. To add this name into the index, click either **+Add as new student** or +**Add as new organization**. You can delete the name by clicking Ignore.

THE INDEX FLOWING PROCESS

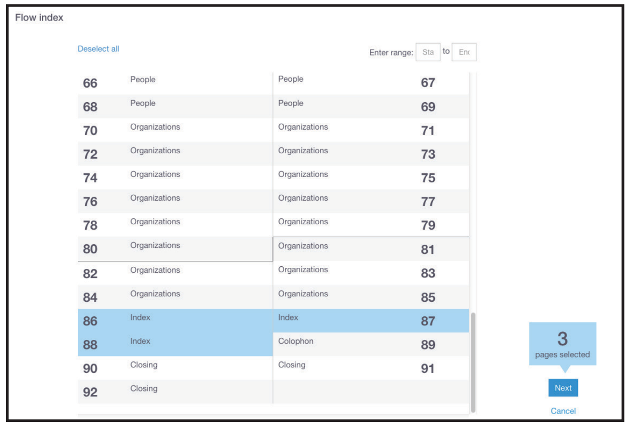
Your index should be part of the last shipment of pages that you submit with your yearbook. Index as many proofed spreads as you can before you finalize the book.

Once you are confident that enough of the book is complete and your index information is ready to be placed on the page, you will need to return to the Portraits and Index area.

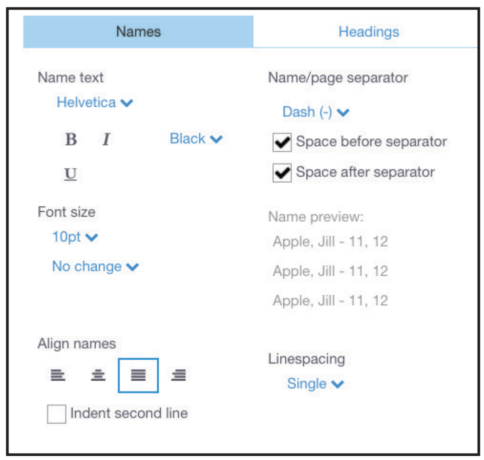
To flow your index on to a page:

1. Go to the **Portraits and Index** section.
2. Click **Flow Index** in the task menu.
3. Your yearbook's ladder will be displayed, along with a list of index matches for each page. If any line still lists unmatched names, you can do a final check by clicking the line and the Indexing window for that spread will open. When you are ready for the next step, click **Flow Index** in the right sidebar.

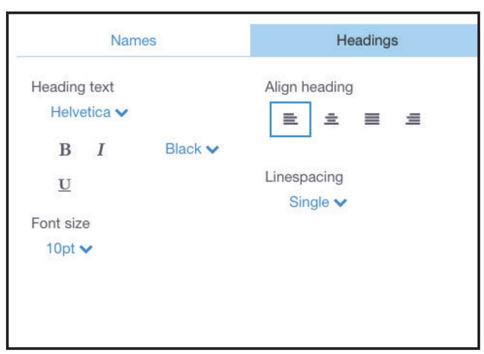
4. In the new window that opens, find the pages on which your index will appear and click to select them. When you have selected enough pages to fit your index information, the blue Next button in the lower right corner will become active. Click **Next**.



5. You will now be able to make adjustments to the layout and text. Under **Names**, use the menus to adjust the alignment, spacing and other text changes.



6. Under Headings, you can adjust spacing, alignment, font and type size.

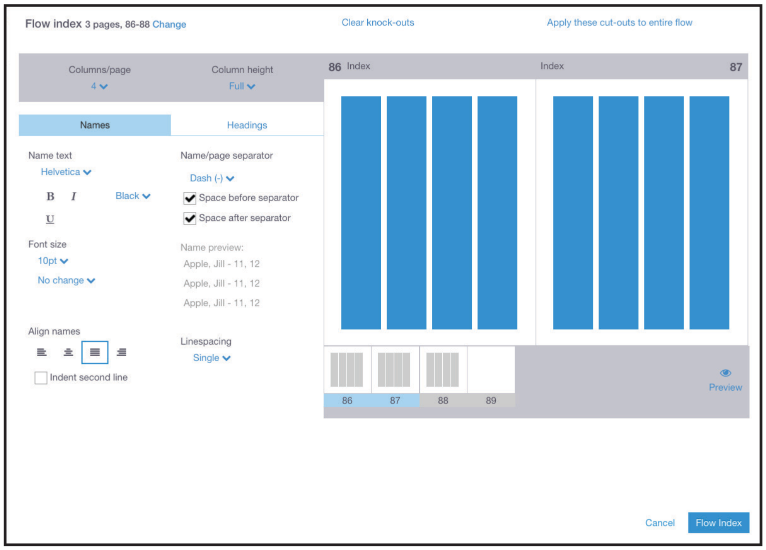


7. The drop-downs at the top of the window allow you to adjust the number of columns/page and the column height.

8. At the top of the window, you can scroll through the different design options for applying knock-outs (or pockets of white space) to your pages. Click to select one. Undo it by clicking **Clear knock-outs**. You can also apply knock-outs to your pages by clicking the individual image windows in the preview screen.

9. To view what your portrait page layout will look like at any time, click the Preview button in the lower right corner.

10. When your pages are set the way you like, click **Flow Index**.



SETTING UP YOUR SALES AND MARKETING

All of the sales and marketing activity you will do for your yearbook will be done through the Sales screen of Yearbook 360.

It's important to note that the Sales area of Yearbook 360 will only display in the navigation for users who have the proper permissions. Typically, only Admins and Editors would have this permission. Regular Staff Member accounts would not see the Sales tab in the navigation or be able to access this area.

Within the Sales area, you will manage and track all of the following:

- The pricing and deadline dates for your yearbook and ad sales
- How many yearbooks and ads you have sold
- What options you sell with your yearbook
- Who has purchased a yearbook and/or an ad
- How to promote your book and ad sales to your audience

ONLINE SALES

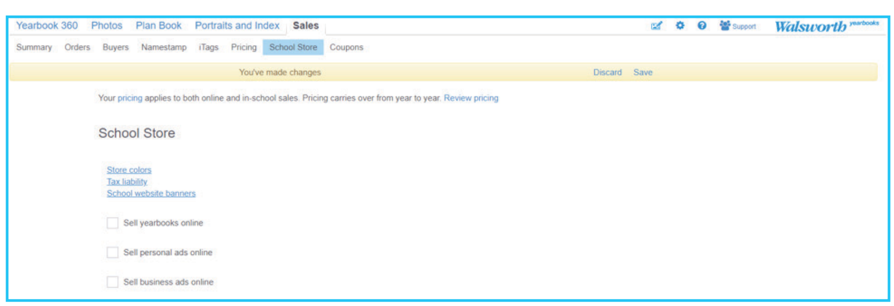
All of Walsworth's Online Sales go through yearbookforever.com, and each Walsworth school that chooses to use Online Sales will have their own School Store there. Follow these steps to get your online store up and running.

To set up pricing for your Online Sales:

All of Walsworth's Online Sales go through yearbookforever.com, and each Walsworth school that chooses to use Online Sales will have their own School Store there. Follow these steps to get your online store up and running.

1. Once logged in to Yearbook 360, go to **Sales > Pricing**.
2. On the Pricing screen, set your yearbook price in the spaces provided. Use the entries under Price change dates to set staggered pricing that increases as the year goes along.

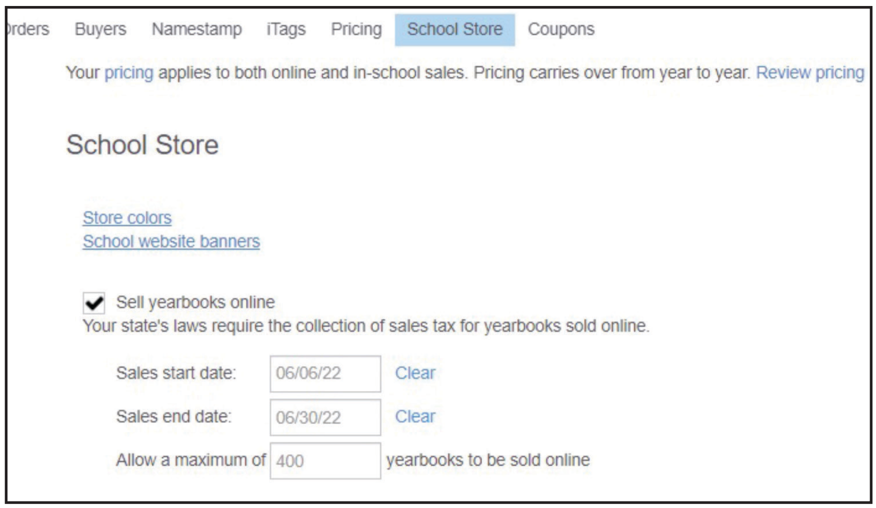
To set up your online School Store:



1. Once logged in to Yearbook 360, go to **Sales > School Store**.
2. If you will be offering online yearbook sales, click the checkbox to **Sell yearbooks online**.
3. Fill in the options for a start and end date for your book sales, what the maximum number of books you will sell online and if you will be including a service fee in your price.
4. Repeat this process lower on the page for your personal ad sales and business ad sales. Note that with ad sales, you will have the option to check different design options for your customers:
   a. Have the School Design My Ad
   b. Upload My Finished Ad
   c. Design My Own Ad Online

NOTE

Walsworth will collect tax for those schools in a state that requires us to do so. No action is required on the part of those schools.



There are other customization options for your School Store via links at the top of the page.

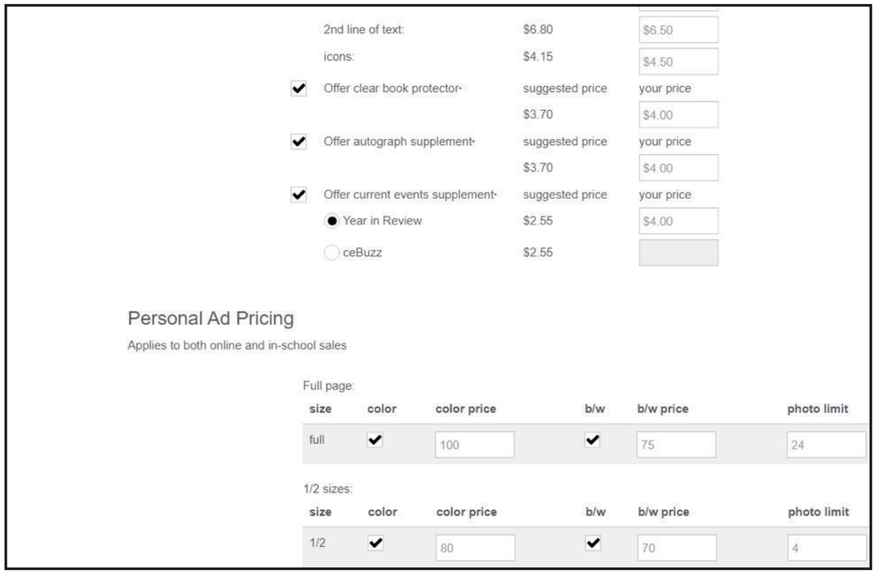
- **Store colors -** In this window, you will be able to choose a primary and secondary school color from a palette to add a fun personal touch to your store.
- **School website banners -** Walsworth will provide you with a variety of web banners to promote your School Store and you can pick up the HTML code here. Simply use the drop-down menu to select the banner you want, then cut and paste the HTML and place on your site.

NOTE

if you are a returning user to Yearbook 360, pricing from the previous year will automatically be carried over by default. If there are changes, you will need to make them on the Pricing screen.

SETTING UP YOUR SALES AND MARKETING

SECTION 8



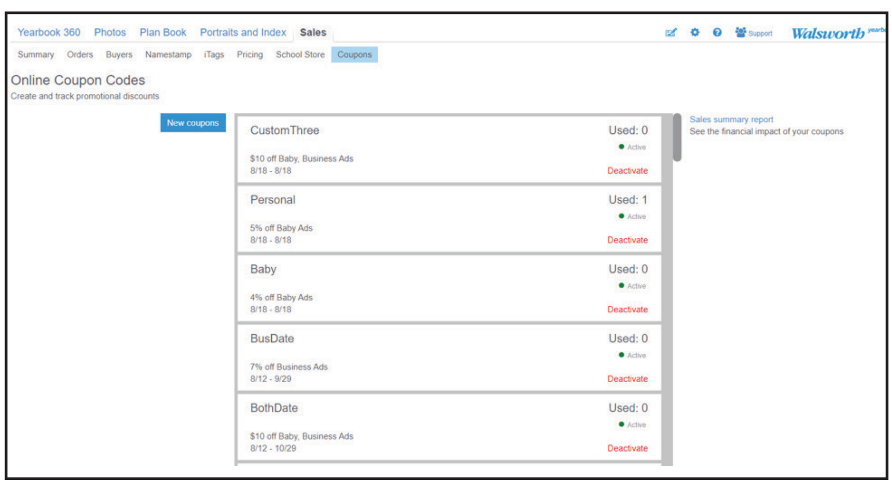
5. As you scroll down the screen, you will see the areas to set the pricing for extra options like namestamping, iTags and current events supplements, as well as packages that include a combination of options.

6. Further down the screen below the yearbook pricing, you will see the entries where you can set prices and sizes for your personal and business online ad sales.

7. Once all of your pricing is set, you can turn your sales on by clicking the Activate **School Store** link at the top of the page. Your own School Store will now be turned on at **yearbookforever.com**.

SETTING UP COUPON CODES

The Coupon Code feature in Yearbook 360's Sales area allows you to offer special event or holiday discounts to a select group of students.



NOTE

you can set up as many codes as you like at a given time. However, buyers may apply only one coupon per order.

SECTION 8

SETTING UP YOUR SALES AND MARKETING

The setup and management of Coupon Codes can be done easily within the Sales area by following the steps below.

1. Within the Sales area, click the **Coupons** tab.
2. You will now be on the Coupon Codes page, where you can create new codes and manage existing ones. To create a new code, click the New coupon button.
3. In the pop-up window, fill out the following information for your new Coupon Code:
   - Code name – Should be catchy and easy to remember; it cannot have spaces, and it is case-sensitive
   - Use the radio buttons to choose where this code applies to Yearbooks or Ads; if Ads, check whether it is Personal Ads or Business Ads
   - Enter the amount of the coupon code in the Discount field
   - Enter a start and end date for your coupon in the Date Range fields (this choice is optional)
4. Click **Save and activate**.

All of your Coupon Codes will be found on the menu on the Coupon Codes page. You will be able to edit them until they become active. At that point, a Coupon Code can no longer be edited, they can only be turned off by pressing the **Deactivate** button in the main coupon menu.

You can check on the status of your Coupon Codes at any time by clicking the **Sales summary report** link in the top right of the main Coupon Codes page.

SELLING EXTRA OPTIONS

When you set up the pricing for your School Store (see “To set up pricing for your Online Sales” earlier in this section), you also selected whether or not you will be selling extra options such as namestamping and iTags online.

If you choose to sell namestamps and iTags in your School Store, you can specifically track those orders within the Namestamp and iTags pages in the Sales area. Both pages also provide you the option to add orders, if you also choose to supplement your sales by accepting in-school orders.

To review or edit your namestamp orders:

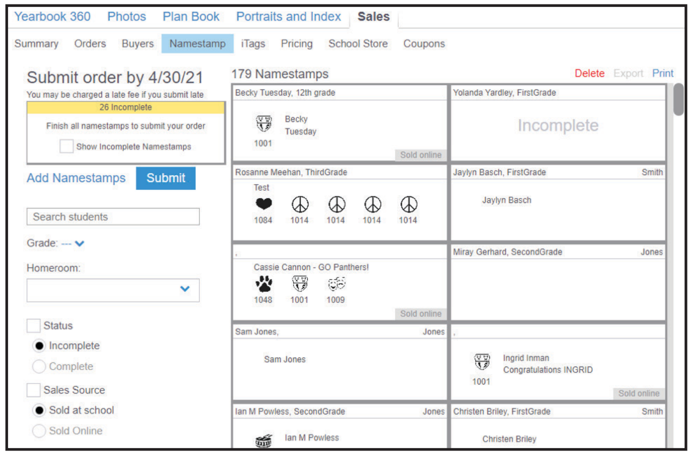
1. Click on the **Namestamps** tab within the Sales section of Yearbook 360.
2. Any namestamp orders that have been placed online will appear on the page. Simply click on one and click **Edit**. Please note that only orders that have been manually entered in school can be edited.

SECTION 8

SETTING UP YOUR SALES AND MARKETING

NOTE

Your namestamp list can only be submitted once. Your submission deadline appears at the top left corner of the page. You should not click Submit to start the submission process until your order list is complete.



To manually enter an in-school namestamp order:

1. From the **Namestamps** page, click on the **Add Namestamps** link on the left side.
2. If you are tracking sales of your namestamps online, choose the **Add Namestamps and sales** button in the pop-up window. If you are not keeping track of your sales in Yearbook 360, but just wish to upload your namestamp orders, choose the **Add Namestamps only** option.
3. Follow the steps to complete adding your namestamp order to the system. You will need to select whether you are importing student names or manually typing them in.

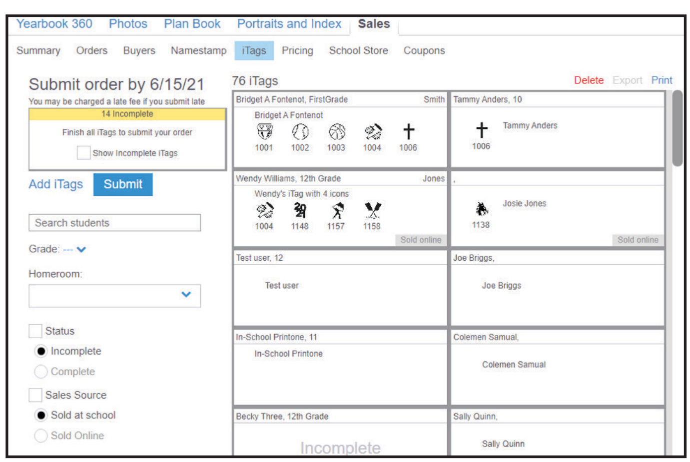
To submit your namestamp list:

1. From the **Namestamps** page, click on the blue **Submit** button on the left side.
2. 2. Check your preferences, then continue the steps through the submission procedure.

The process for tracking iTag orders is very similar. It's just done on the iTags page within the Sales area.

To review or edit your iTag orders:

1. Click on the **iTags** tab within the Sales section of Yearbook 360.
2. Any iTag orders that have been placed online will appear on the page. Simply click on one and click **Edit**. Please note that only orders that have been manually entered in school can be edited.



To manually enter an in-school iTag order:

1. From the iTags page, click on the Add iTags link on the left side.
2. If you are tracking sales of your iTags online, choose the Add iTags and sales button in the pop-up window. If you are not keeping track of your sales in Yearbook 360, but just wish to upload your iTag orders, choose the Add iTags only option.
3. Follow the steps to complete adding your iTag order to the system. You will need to select whether you are importing student names or manually typing them in.

To submit your iTags list:

1. From the **iTags** page, click on the blue **Submit** button on the left side.
2. Check your preferences, then continue the steps through the submission procedure.

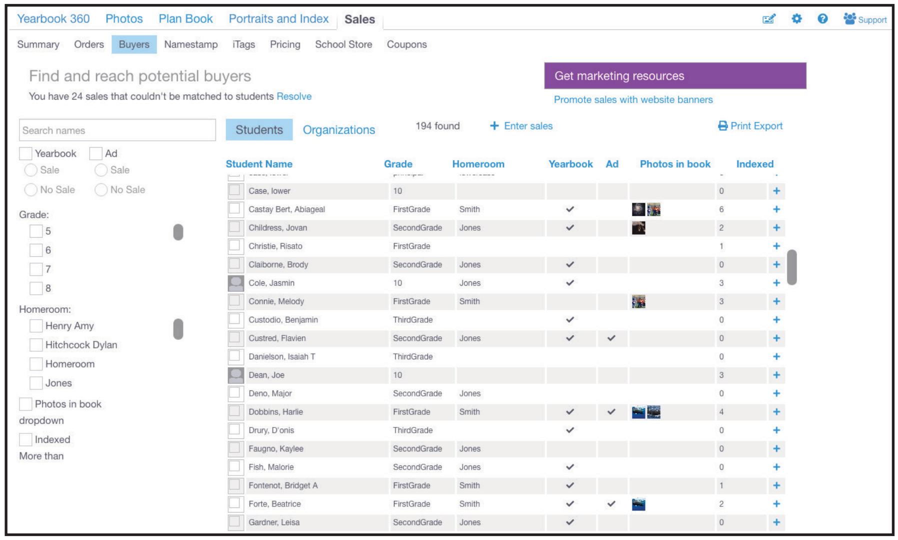
TRACKING ORDERS AND BUYERS

Within the Sales area of Yearbook 360, there are two screens that let you track your sales activity. The first one is the **Orders** screen.

When you click Orders in the sub-menu, you will be taken to a screen that displays all of your Online Sales orders to date. There are several items to note about this screen:

- By default, you will always see your Student orders first; you can see any of your ad orders sold to businesses by changing the Sold to drop-down in the top left corner to Businesses.
- An up-to-date tally of your orders will always appear in the top left corner.
- The fields at the top of the screen for Date, Name, Grade, etc., allow you to search or sort through your order list if you are looking for something specific.
- Each line shows a quick summary of an order (date, name, order #, total, status, etc.), but you can see more details by clicking on any line and opening up an order details window.
- Within that details window, you can edit an order, or delete it if necessary.

The **Buyers** screen looks at your online sales from a different vantage point – keeping track of which students have and have not purchased a yearbook yet, and also giving you a quick glance look at where they appear in the book.



Important functionality to take note of on the Buyers screen includes the following:

- Your list of buyers can be sorted in a variety of ways, using the headings at the top of each column above your list, including Student Name, Homeroom, Grade and whether or not the buyer has purchased a yearbook or ad.
- The list can also be filtered using the same categories on the left side of the screen, where you can also search by individual name.
- This screen can also be a key coverage tool, using the **Photos in book** column. Each time you tag a student in a photo that is placed on a page in the Yearbook 360 Page Editor, it will be recorded on this screen, allowing you to see just how inclusive your coverage is.
- The Indexed column allows you to track whether or not a buyer has been indexed in the book.
- By clicking the Organizations tab at the top of the page, you can monitor your business ad sales with the same features.

PROOFING AND SUBMITTING YOUR PAGES

Plenty of hard work goes into creating your yearbook. After all the photos are taken, the copy is written and the spreads get designed, it will be time to proof your pages and get them submitted by deadline.

In this section, you will learn the process within Yearbook 360 for:

- Requesting PDF proofs of your spreads
- Updating the proofing status of your spreads
- Submitting your spreads once they have been approved

CREATING PDF PROOFS

Once a spread is ready for proofing, there are a couple of ways you can create a PDF proof in Yearbook 360 and update the spread's status to Proof.

To create a PDF proof of a single spread:

1. From the home page, click the row on the ladder to open a spread's details window. Do **NOT** click on the spread's thumbnail, which will take you directly into Online Design.
2. Click the **Proof this spread** link.
3. It might take a couple minutes to generate the PDF, but a View Proof link will appear. Also note that the status of the spread will be shifted from Started to Proof at the top of the window. Click **View Proof**.

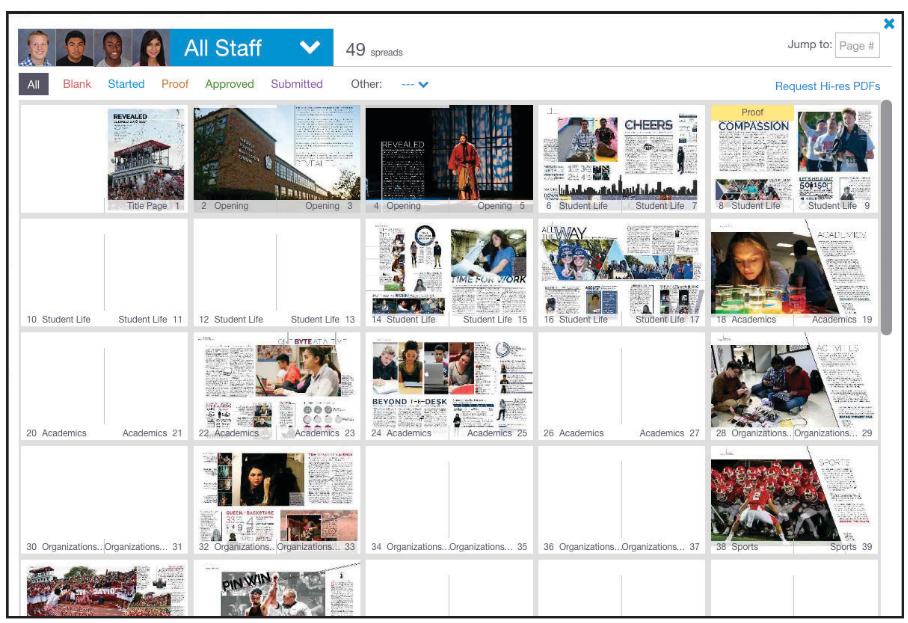
4. Your PDF proof will open in a new browser window, and you should be able to print the pages for review.

Once a proof has been created, you will also have quick access to the PDF via the ladder on the home page. A PDF link will be visible next to the spread's page numbers. Once you re-open the spread and make any changes, that link will no longer appear until a new proof is generated.

You can create hi-res PDF proofs for multiple spreads at a time using the following steps.

To create PDF proofs of multiple spreads:

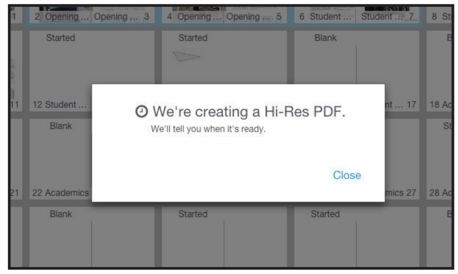
1. Go to the home page.
2. Click the **View all spreads** link located at the bottom of the ladder.



NOTE

When you are working with the ladder on the home page, clicking on a spread's thumbnail will **NOT** open the spread's status window. It will open the spread in Yearbook 360.

3. In the new window that opens, click Request **Hi-Res PDFs** near the top right corner.
4. Scroll through the spread thumbnails and click to select the spreads you want PDF proofs for. The spreads you have selected will be highlighted in blue.
5. Click **Request PDFs** in the lower right corner. A message will open telling you the PDF creation is in progress.



APPROVING A PROOF

Once you have requested PDFs of your spreads, the proofing process can begin.

As you review the high-res PDF proofs, remember to zoom in to 200-300% to evaluate image resolution. Also pay close attention to the trim marks around the edge of the page. Elements that extend into the trim will be cut off.

Your staff may also want to print a copy of all your high-res PDF proofs and store them for archive purposes.

Once you are done proofing a spread and all corrections have been made, you can update its status to Approved.

To approve a proof:

1. In any of the ladder views, find a spread in the Proof stage and click on the spread to open the spread's status window. Click **View proof**. From the home page, spreads in the Proof stage will show a quick, easy PDF link in the ladder.
2. Once you are satisfied that the proof is clean, return to the spread's status window and click **Approve proof**.

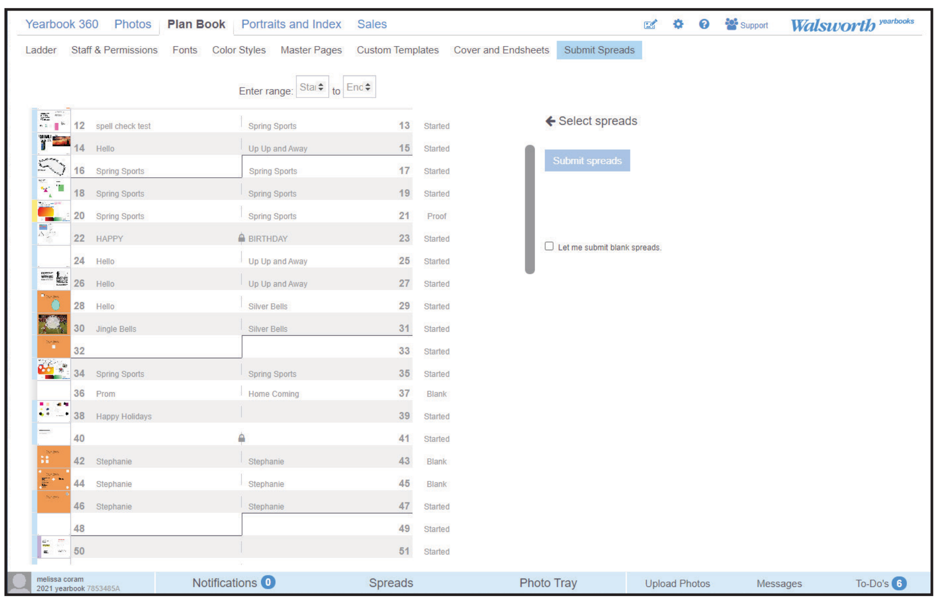
SUBMITTING YOUR PAGES

Once proofing has been completed for a spread and it has been moved to Approved, those pages should be ready for submission by users with the proper permissions – typically the adviser.

Spreads will be submitted in the Plan Book area. However, you must thoroughly review your proofs before submission, because once spreads have been submitted there will be significant extra charges to bring them back for corrections. So, always be sure to allot the time necessary to review proofs carefully and completely before authorizing them for submission.

To submit a spread:

1. Go to the **Plan Book** area.
2. Click **Submit Spreads** in the task menu.
3. Find the spreads in the ladder that you would like to submit and click to select them. Note that you will only be able to select spreads that have been proofed and moved to the **Approved** status.
4. Click the blue **Submit Spreads** button when it becomes active.



SUBMITTING BLANK PAGES

Sometimes, particularly near the back of the yearbook, your staff will want to submit blank pages without even page numbers on them.

Submitting blank pages in Yearbook 360 is quick, easy and only takes a few steps.

First, it's important to note that blank spreads can only be submitted using the batch submission within Plan Book.

To submit blank pages:

1. Go to Plan Book, then click on **Submit Spreads**.
2. On the right side of the page, click to select the **Let me submit blank spreads** check box.
3. In the ladder on the left, click to highlight the spreads you want to submit as blank pages. Then click the **Submit spreads** button.
4. In the review screen that pops up, click the **Keep spread blank** check box. Then click **Looks good**.
5. You will see a final submission window. Take one final look at the list of blank spreads you are submitting to confirm they are correct. Then click the check box to certify the submission is correct. Click **Submit**.

In addition, sometimes plans change. So you can take a spread that already has elements placed on it and revert it to a blank in one step.

From within Online Design, simply go to **File > Revert to Blank Spread.**

NOTES

Walsworth yearbooks

customer service 800.972.4968

computer support 800.369.1530