

# Desktop App Quick Start Guide

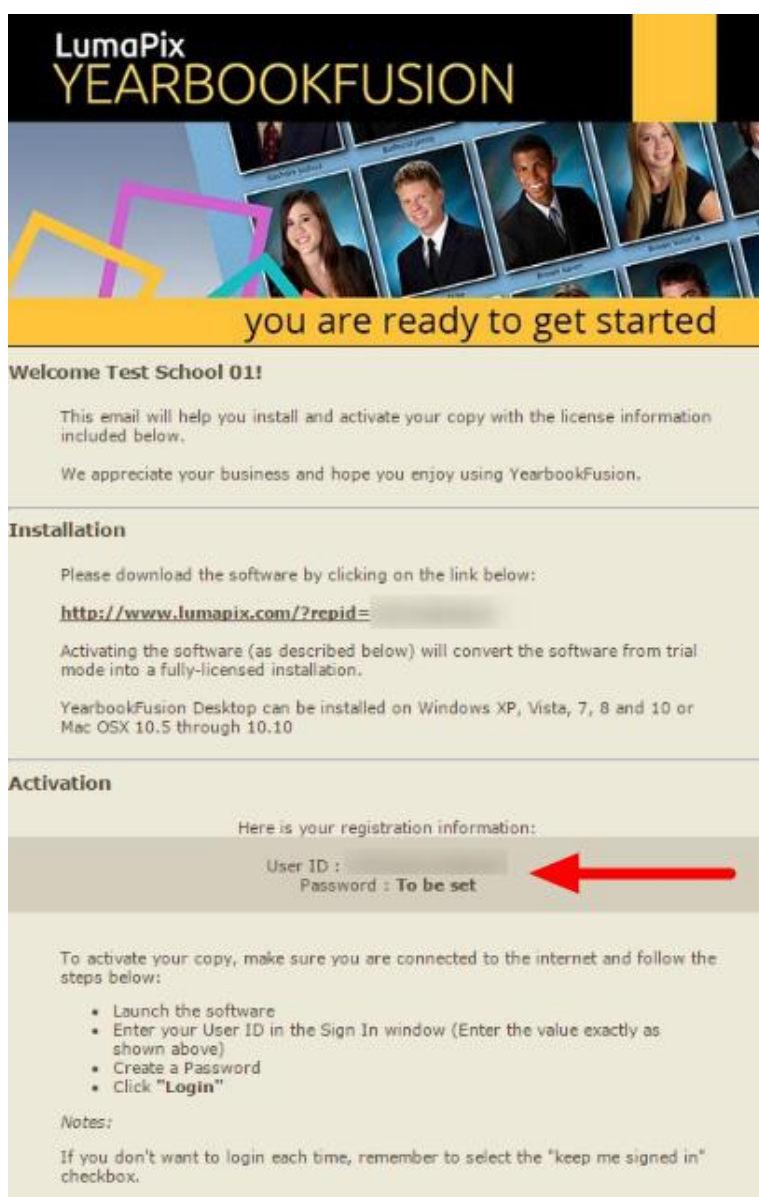
*Welcome to YearbookFusion Desktop.*

This guide will help you get started and plan out your yearbook process from start to end.

## Step 1: Install the Software

At the time your license was assigned by your yearbook publishing company, a Welcome email was sent to your local yearbook manager.

This email contains a link to download YearbookFusion, and your school/license ID.



To install YearbookFusion, click on the link. You can run the installer directly or save it to your desktop and then run it.

*Note: If you are installing the software on a school computer, you may need permission from your local IT/Network professional.*

*If you experience any difficulties installing the software, pass the System Requirements information to your IT/Network professional.*

Repeat the installation procedure for all computers which require the software.

## Step 2: Sign in with your school/license ID

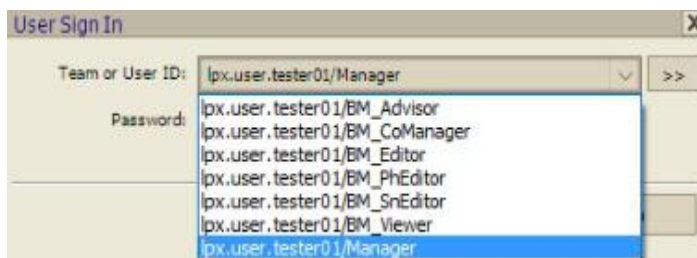
When you launch YearbookFusion, you will be prompted to sign in.

Type your TeamID or UserID. If this is the first time you are signing in, you will be prompted to create a password.

Otherwise, type your existing password. Complete the Login process.



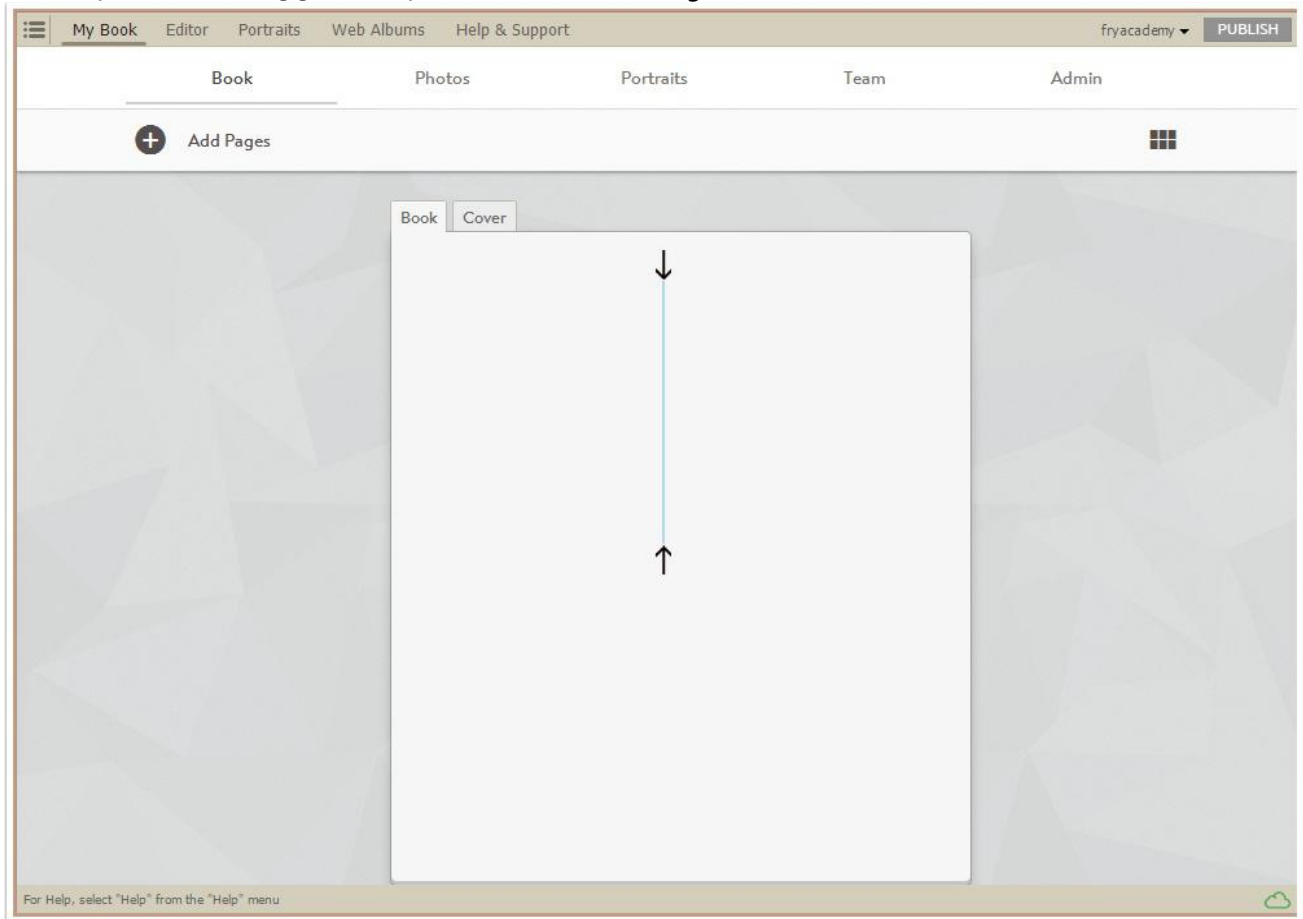
*Note: Yearbook managers can set up team members, each with a specific login.*



**Don't know your login?** *If you are the yearbook manager who needs help with your login, contact your yearbook publishing company. If you are part of a yearbook team, contact your local manager. More details can be found here.*

**Problems activating?** *Pass the System Requirements information to your IT/Network professional. YearbookFusion may not be able to access your school's internet connection.*

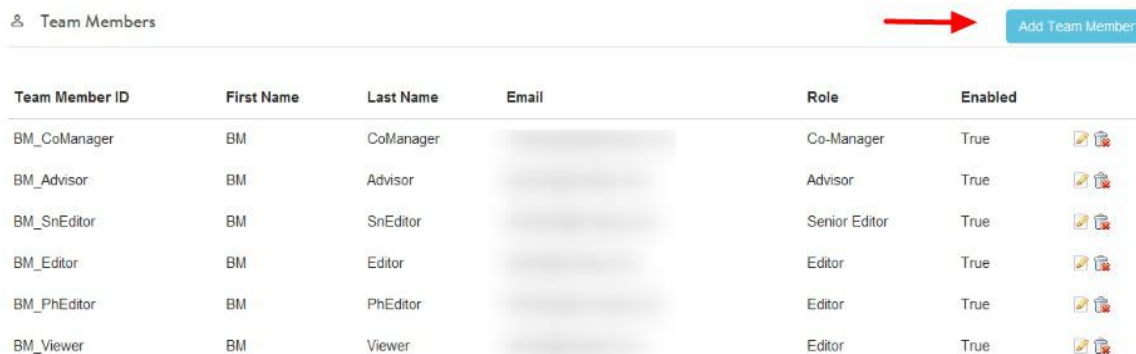
Once you have logged in, you will see the **My Book** tab.



### Step 3: Assign Team Roles (optional)

As a manager of a yearbook committee, you can create up to forty separate log-ins for your team members. You can assign roles to your committee members, providing them various levels of access and editing privileges based on their assigned role.

To manage your team, click the **Team** tab at the top of your page. Choose **Add Team Member**.



You can then set up their account, including assigning a role. Their role will define their level of access to the book.

Manage Team Member

Team Member ID: \_\_\_\_\_

Password: \_\_\_\_\_

First Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

Email: \_\_\_\_\_

Role: Editor [What role should I choose?](#)

Enabled:

Send confirmation email: Yes

Cancel Save Changes

Clicking on **What role should I choose?** will show you the **Roles Overview** outlining what each role can do.

Roles Overview

Roles allow you to easily limit the features which are available to users in your team.

For most **student** users, the **editor or senior editor** roles are recommended. For staff accounts, the **advisor or co-manager** roles are recommended.

	Edit Assigned Pages	Edit Any Page	Add/Remove/Re-order Pages	Approve/Reject Pages	Manage Users
Co-Manager	✓	✓	✓	✓	✓
Advisor	✓	✓	✓	✓	✗
Senior Editor	✓	✓	✗	✗	✗
Editor	✓	✗	✗	✗	✗

Only the account owner has access to the administrator area. There is only one administrator per account.

OK

You can automatically send the team member a Welcome email (*Send Confirmation email: Yes*) so they will be able to login to the book and start working.

Click **Save** to create the team member. Continue to make new team members, or continue on to Step 3.

*(Note: you can make changes to team members at any time after they are created.)*

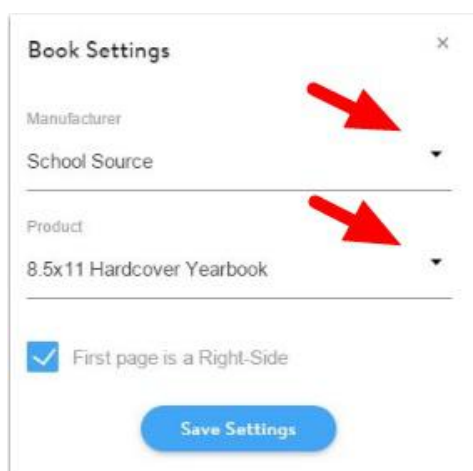
## Step 4: Select a Book Size

Select the Admin tab. Check the settings under Book Settings.



If the product selected is correct, make no changes.

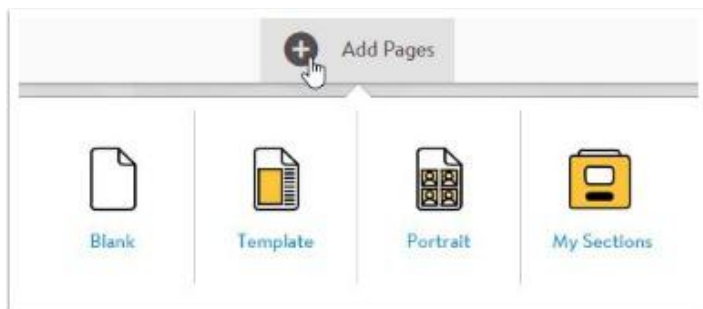
If you are under contract to make a different type of book other than the one specified, **edit** the product to select the correct product.



You can update the form factor as required – the new settings will apply to all of your pages.

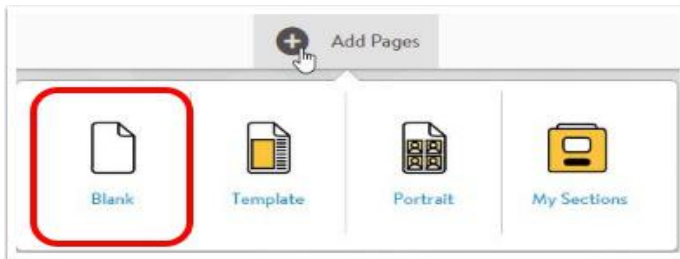
## Step 5: Add Pages to Your Book

You can add pages to your book from a variety of sources.



## Add a Blank page

If you want to work from a blank slate, hover over **Add Pages** and choose **Blank**.



You can create multiple sections at once.



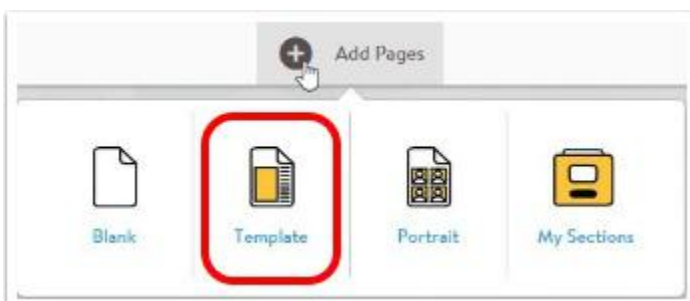
Provide a title for the section (eg. Principal's Page, Homecoming, etc.) and specify the number of pages for that section. Check mark **Double Pages** if you would like your section to be made up of double page spreads instead of single pages.

Click on the **Create Sections** button to generate the empty sections in your ladder.

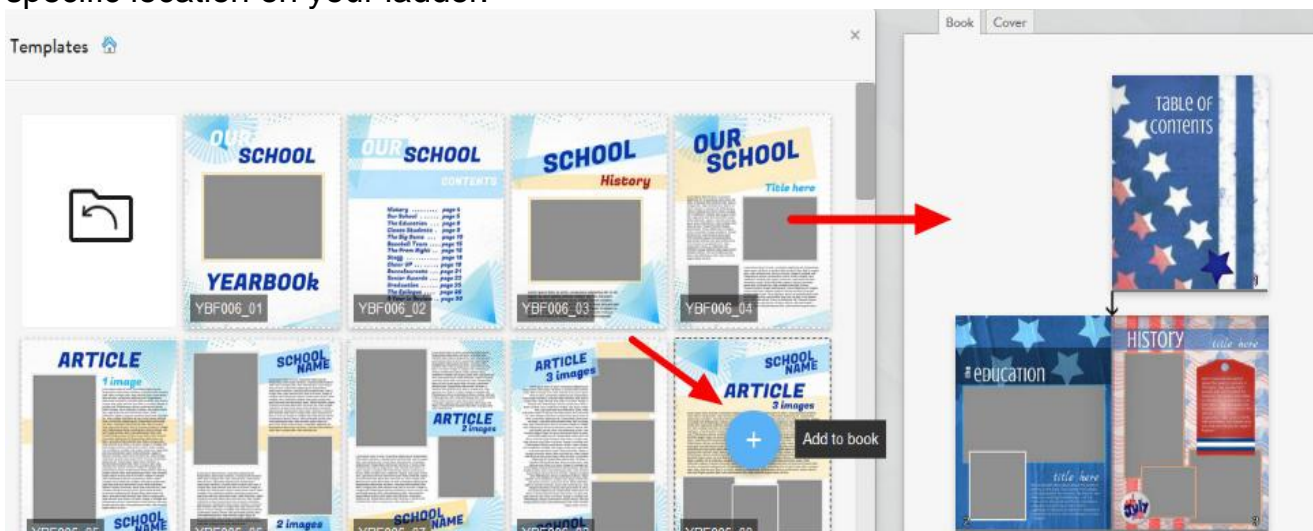
## Add Templates

YearbookFusion Online provides access to an extensive collection of pre-made layouts, which include basic templates (empty image frames and text placeholders on a white background), complete yearbook layouts (40 page designs on a common theme), and themed pages (complete designs for school activities and common yearbook themes). The templates can be completely customized.

To add a template, hover over **Add Pages** and click **Template**.



Click on the Folder thumbnails to choose your category of choice. When you find a template you want to use, hover over it, and click **Add to book**. The template will be inserted into your ladder. You can also drag templates to a specific location on your ladder.



## Add Existing Sections

You can add previously made pages that were removed from your ladder, or sections made for from the previous year's project. Hover over **Add Pages**, then click on **My Sections**.



Search for the page you want to add. When you find it, hover over it, then click **Add to book** to insert the page into your ladder. You can also drag it the layout to the ladder.

## Duplicate a section

Any section already on your ladder can be duplicated.

Hover over the section on your ladder. Click on **Create a copy of this section**.

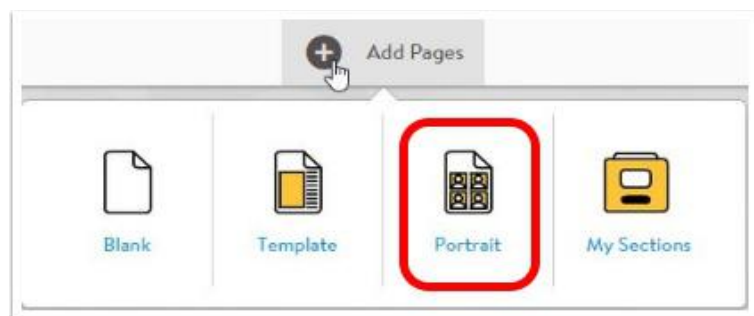
With this action, you can make multiple copies of custom-made pages you want to use as a template in your book.



## Add Portrait Pages

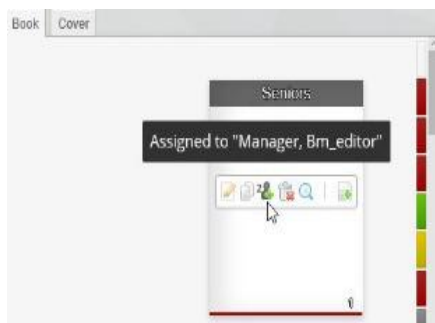
To create a panel page, you will need to import a portrait database (also known as a PSPA CD).

Once the import is complete, you can add portrait pages to your ladder. See Steps 8 and 9 below for details.



## Step 6: Assign Sections to Your Team Members

To assign a section to a team member, hover over the section and select **Assign this page for editing**.





Check off your team member(s) to assign to this section. When done, click on **Save Assignments**. You can also batch assign to multiple people by selecting **Batch Assign To**.

Americana 002 - Page 1 assignment

Batch Assign To: Choose an option ×

<input type="checkbox"/>	User	Role	Contact Name	Email
<input type="checkbox"/>	Manager (You)	Manager	LPX.User.Tester01 -	
<input type="checkbox"/>	BM_CoManager	Co-Manager	BM CoManager	
<input type="checkbox"/>	BM_Advisor	Advisor	BM Advisor	
<input type="checkbox"/>	BM_SnEditor	Senior Editor	BM SnEditor	
<input type="checkbox"/>	BM_Editor	Editor	BM Editor	
<input type="checkbox"/>	BM_PhEditor	Editor	BM PhEditor	
<input type="checkbox"/>	BM_Viewer	Editor	BM Viewer	

Save Assignments

The image shows a user interface for assigning team members to a section. A table lists users with checkboxes. A dropdown menu is open, showing options: All, None, Managers, Co-Managers, Advisors, Senior Editors, and Editors. A red arrow points to the 'Batch Assign To' label, and another red arrow points to the 'Save Assignments' button.

To see who a page is assigned to or make changes to the assignment at any time, hover over the page on the ladder, then click on the Team icon.

## Step 7: Edit Your Candid Pages

To launch a section into editing mode, hover over it and click on **Edit this section**. Your section will launch in the Editor tab.



When a section is opened, a lock will appear on it in the ladder. Note: You can unlock and edit a page currently being edited by another team member by clicking on the lock icon, however they will lose any unsaved changes.



When the project is opened in the Editor you can add images, clipart and decorations, and customize text.

Note: your project will be auto-saved during the process.

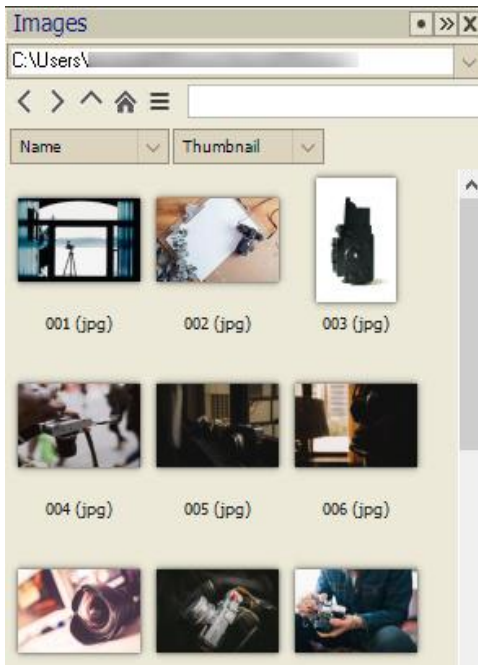


## Adding Images

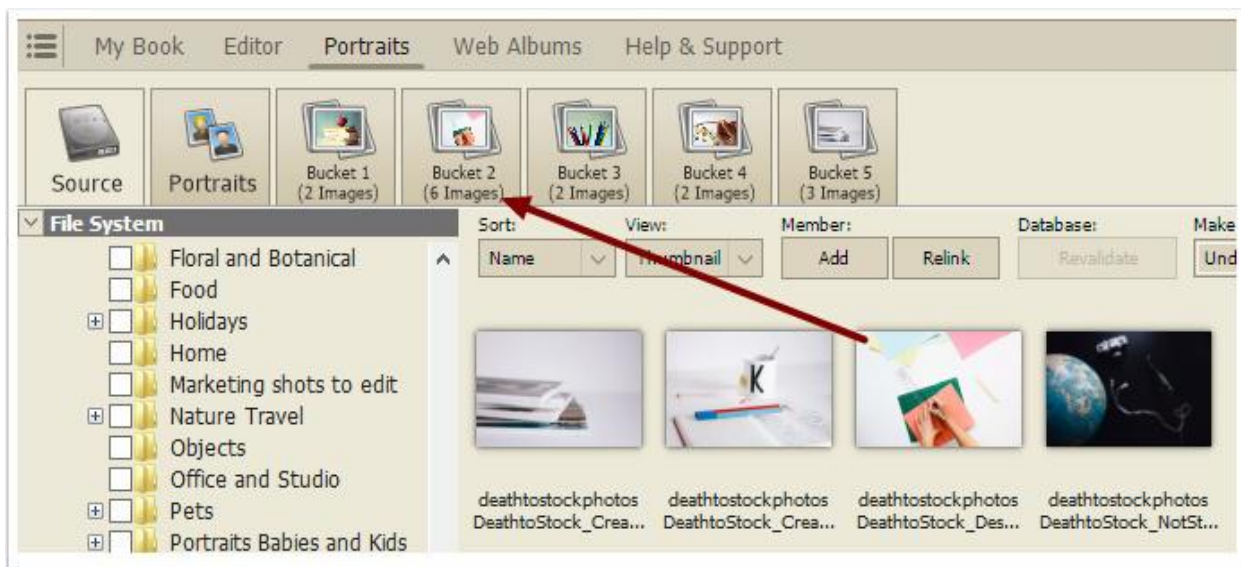
Your photos are accessed through the hovers in the top right-corner of the Editor.



Click on **Images** to navigate to your local images.



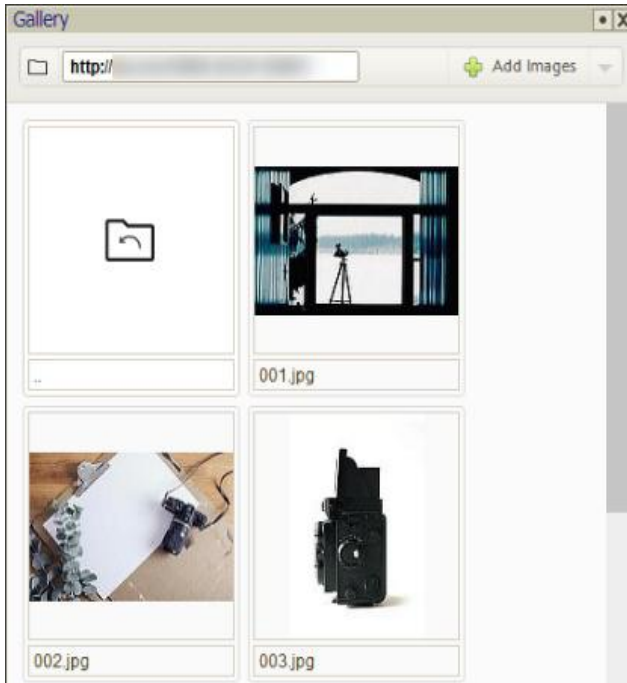
Buckets allows you to triage local images into categories under the Portraits tab, then access these images on the Editor, for use them on your layouts.



The Gallery provides a means for team members and other people in your community to share images for your yearbook.

Team members can create folders to organize their photos, then click Add Images to upload photos to a cloud server.

Within the Gallery, use the **Dropbox** folder to send a url (website address) or QR Code to members of your community, so they can upload images on any web browser or through the LumaPix uploader app.



Add decorative embellishments or complete layouts from the **Templates, Decorations, Frames, Backgrounds, Headers** and **Covers** hovers.

Access to thousands of cliparts, background papers, word art and layouts is at your fingertips.



## Step 9: Import Your Portraits

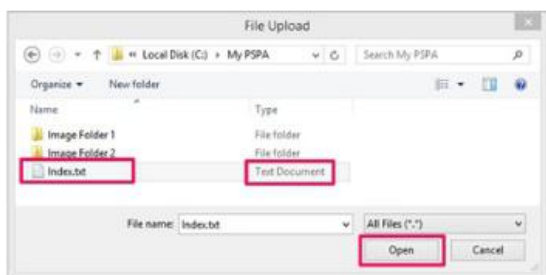
Click on the **Portraits** tab to import your PSPA CD (the CD containing your portrait images and a database file describing them).



Follow the on-screen steps to import your database index file and your portraits.

### Import Portraits

To import portraits, you will be prompted to select an **index.txt** file. This is typically given to you by your publisher and is commonly referred to as a **PSPA CD**.



If you have not been given a **PSPA CD**, we recommend cancelling this import and contacting your publisher.

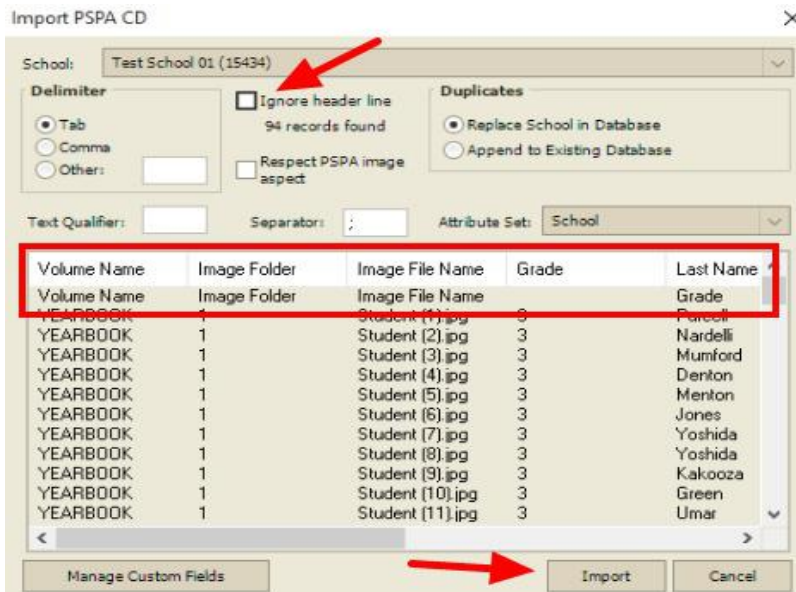
**Important:** This import will be used as a template for all portrait sections. We strongly recommend taking the time to review the accuracy of portrait information and pictures.



First, navigate to your CD drive (or the location the CD was copied to on your computer), and locate the **index.txt** file. Select it and open it.



Continue the import process, verifying that your data is under the correct column. If your PSPA includes a header line, where the column titles are repeated, click **Ignore header line** to remove it.



After the import is complete you can make any changes to the database, using the Custom Attributes area.

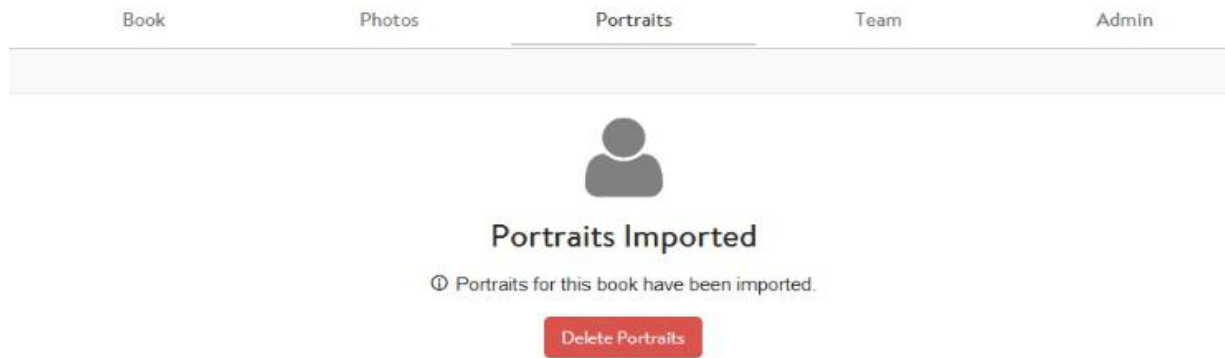
Select a portrait, and update the information associated with it. You can multi-select portraits, and make changes to all selected at the same time (eg. reassign to a new teacher).

Once all your changes are done, click **Save & Close**.

*Note: Any changes made to your database while editing a section will only update that section. Therefore, it is recommended you make all the changes to your database before clicking Save & Close.*

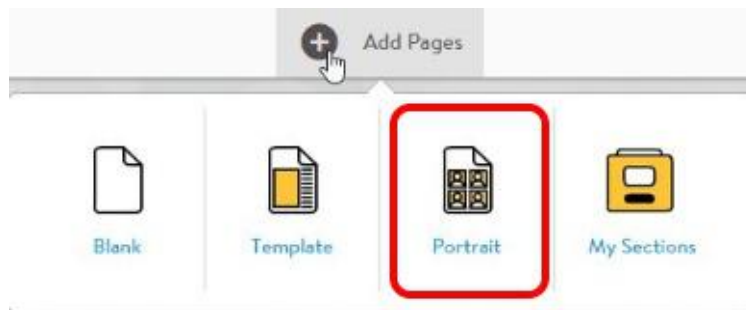


If you need to make major changes to your database, you will need to delete your database and import a new database with all your changes.



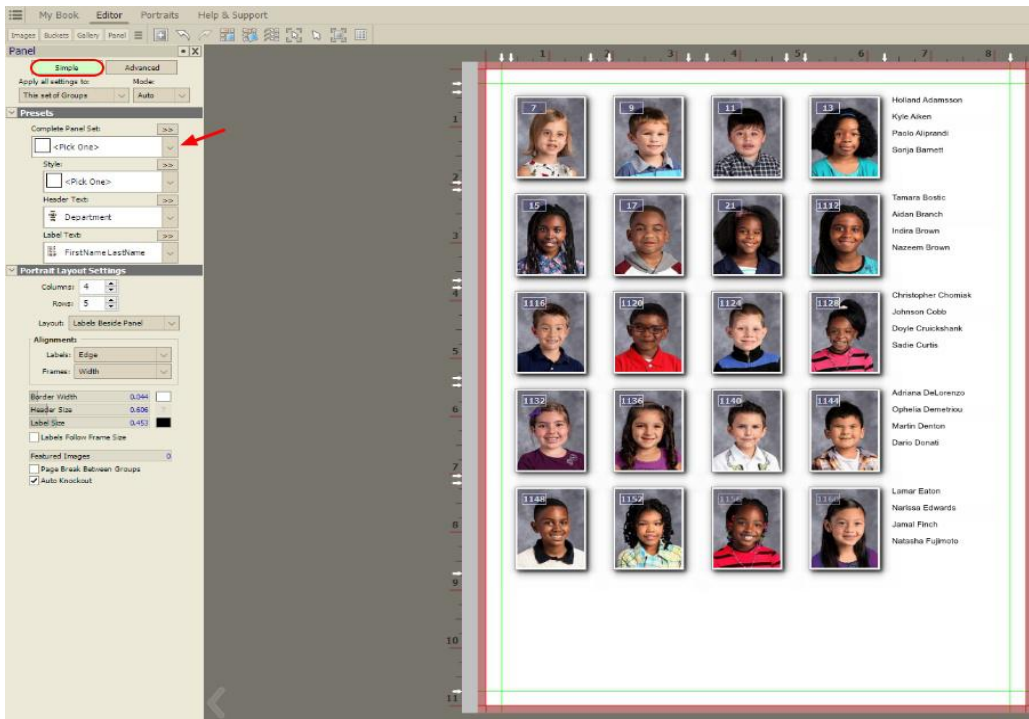
## Step 10: Create Portrait Pages

Hover over **Add Pages** at the top of your page and click on **Portrait**.

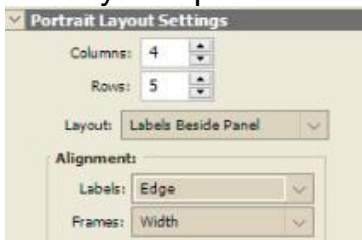


Give your portrait section a name and click Create Portrait Section.

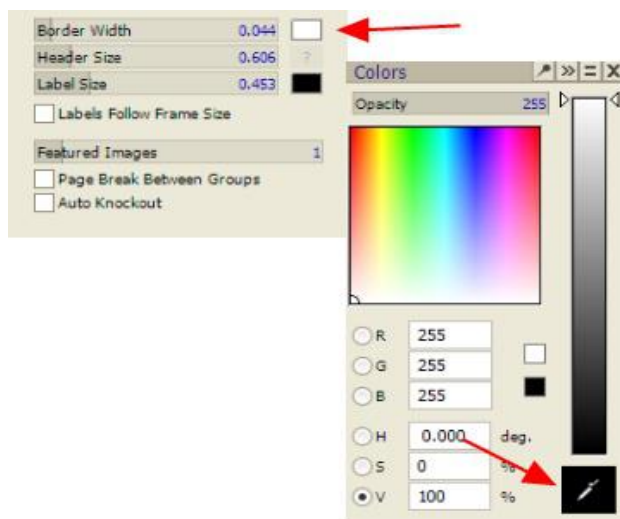
Your page will open up in the **Editor** with the **Panel** hover open on the left. Click on the **Simple** tab and select a **Panel Set** from the drop down menu under **Presets**.



Change the appearance of your layout by customizing the number of columns, rows, and layout options.

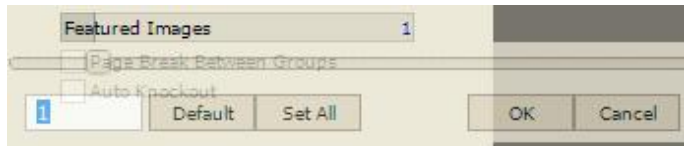


Adjust your panel frame borders (width, color), as well as the header (title) and label size.





Add one or more **Featured Images** to increase the size of the first portrait(s) in your panels – you can make the teachers twice as large as the students.



Check mark **Auto Knockout** if you want to add decorations in the middle of your page. Your panel pages will move away from any dropped image (clipart, photo).



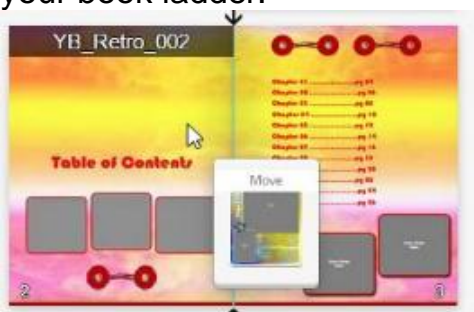
The Advanced tab gives you many more features to style your portrait panel giving you more creative flexibility.

## Step 11: Manage Your Pages

To remove a section, hover over it in the ladder, and click on the trash can icon.



To change the order of your sections, click and drag a page to a new location within your book ladder.



To swap pages, drag one page over another.



## Step 12: Review and Approve Your Sections(optional)

As your pages are completed by your team members, they can be sent for review and approval.

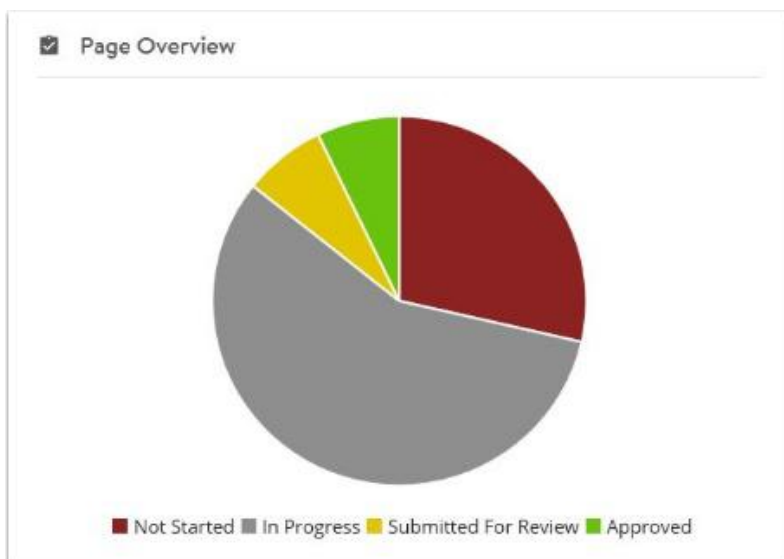
On the Book ladder, select **Submit this page to be reviewed.**



Managers and Co-Managers can approve or reject pages. Once approved, they are locked for editing.



*Note: Approving pages helps you to manage your book under the Admin tab. It's not required to complete your book, but is a valuable management tool to check your book's progress.*

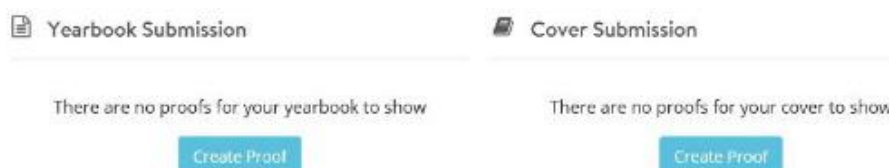


## Step 13: Create a Proof

Once your book is complete, create a proof for the book and the proof for the cover. This provides both you and your publisher an online preview to proof before final submission.

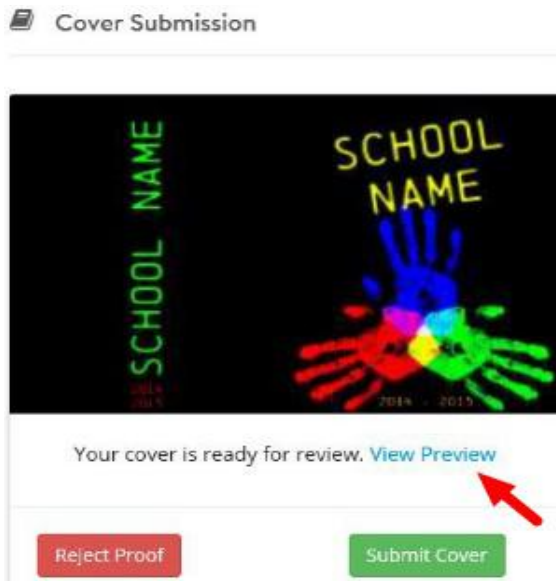
To create a preview, open the **Admin** tab at the top of the page.

Click **Create Proof** under **Yearbook Submission** or under **Cover Submission**.



Click **View Preview** under your Submission to see an online slideshow preview.

*Move through the online preview by swiping left and right, to move through the pages. To close the preview, click X at the top right.*

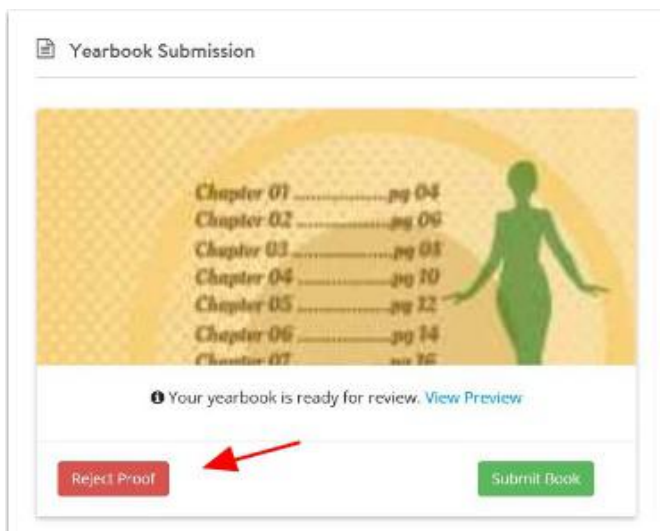


## Step 11: Finalize Your Book

Review your proof.

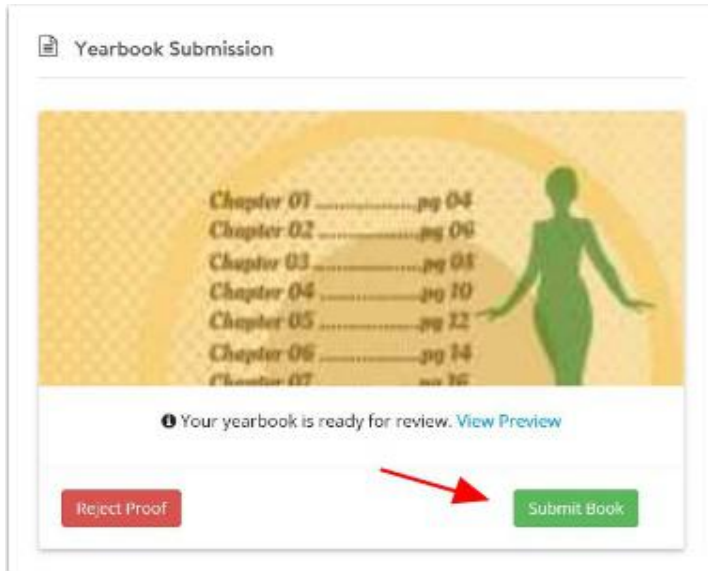
If you need to make more changes, click **Reject Proof**.

This will delete the current proof allowing you to make any changes. Resubmit the proof to start the process again.



If you approve the proof, click **Submit**.

Submitting your book gives your publisher the go-ahead to print your book. Important note: Once submitted, there's no further changes that can be made to your book. If you edit a page, those changes will not be printed.



## Congratulations!

You have made it to the end of the yearbook process!

We sincerely hope it was a pleasant and rewarding experience. Thank you for using YearbookFusion Desktop!