USERS GUIDE

2021-2022

pictavo™

irvin simon
YEARBOOKS

USERS GUIDE

GETTING STARTED

Hello, friend.

Welcome to yearbook. You're in good hands, regardless of your experience level.

YOUR TEAM

Behind the scenes of the Pictavo™ platform there's a whole team of yearbook experts, customer care and tech support lifesavers and programmers constantly working to be there for you, anticipate what you need to produce your book and give you a terrific experience.

Your time is valuable. We won't bombard you with emails — we promise — so please add us to your address book to receive important updates.

We want to make yearbook simple, intuitive and fun. If you get stuck or need a quick answer, refer to the help menu in the upper right corner. You can also email us at **answers@pictavo.com.** If you're just a talk-to-a-person kind of person, we're here for you. Call us at 800.290.0036.

You'll always have us in your corner.

YOUR JOB NUMBER

Our production processes rely on an internal tracking number unique to your book. We call this your "job number," and it helps us look up your account settings faster. Your unique job number is 1234567.

WHICH BROWSER SHOULD YOU USE?

Pictavo™ runs best on Chrome or Safari. When you choose the one that's best for you, communicate that to others who'll be working on your book. Because you can work from any device (yes, even phones!), our HTML5 platform tailors your experience based on browser choice, so make sure everyone uses the same one across all devices.

If you're ready to get started, click **here.**

Happy Yearbooking!

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Terms of Use | We only email you necessary information about your yearbook. Reply to this email with the word UNSUBSCRIBE in the subject line and you will no longer receive this vital information.

BROWSER CHOICE

Do you prefer Chrome or Safari? Good news! Now you can choose which browser you'd like to use to design your book!

Please note, whichever browser you choose, everyone working on the yearbook will have to use the same browser.

ACTIVATE YOUR ACCOUNT

Before diving into the ultimate yearbook design experience, you need to activate your Pictavo account and create a login. Once activated, projects can be logged into anytime, anywhere there is internet access.

Use the link in your activation email to get to the Activation Screen in Pictavo.

LOGGING IN

Enter contact info and a password to activate your book.

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MY ACCOUNT

Let's get into it.

GREENHILLS SCHOOL · ANN ARBOR, MI

BUILD MY BOOK
VIEW LADDER
DESIGN BOOK
ORGANIZE PHOTOS

MANAGE MY BOOK
CALENDAR
ADVISER CENTER
STUDENT CENTER

SELL MY BOOK
STORE SETUP
BOOK SALES

PICTAVO'S HOME PAGE

This page represents the three main functions of any yearbook project: Designing pages, managing the project and selling.

BUILD MY BOOK

Plan the content for each page through View Ladder. Jump right into designing pages through Design Book. And, upload, name, rotate, delete and manage photos through Organize Photos.

MANAGE MY BOOK

The Adviser Center offers functions available only to the adviser: Set up permission-based users and groups, review book specs, select defaults for page design and monitor project status. Manage your portrait database and student roster within the Student Center.
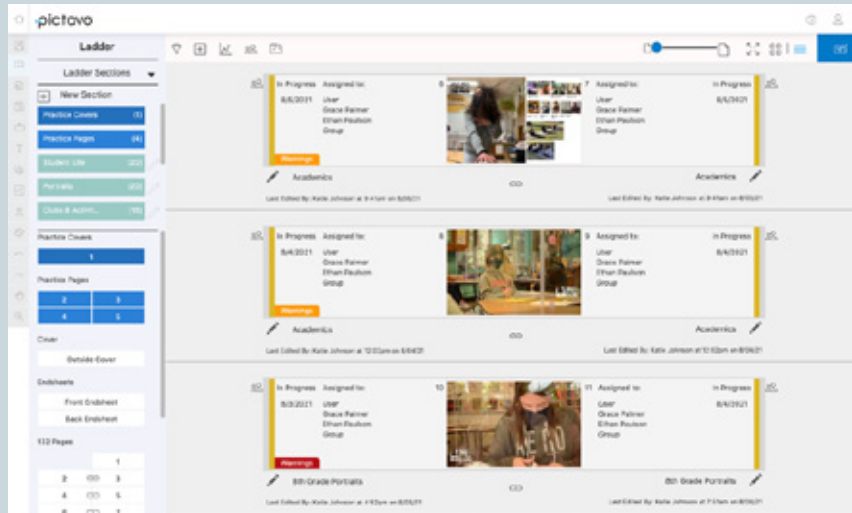
SELL MY BOOK

Set up your products and pricing through Store Setup. Within Books Sales you'll be able to set a sales goal, add cash or check orders and export a sale report for distribution. This section is available if you are using buytheyearbook.com.

BUILD MY BOOK

VIEW LADDER

The ladder is a blueprint for your book and serves as both an organizational and collaborative tool. Pages and sections of the yearbook can be labeled and color-coded. Add pages, create page assignments, view progress and warnings, track user log ins and share high resolution proofs all with the click of a button.
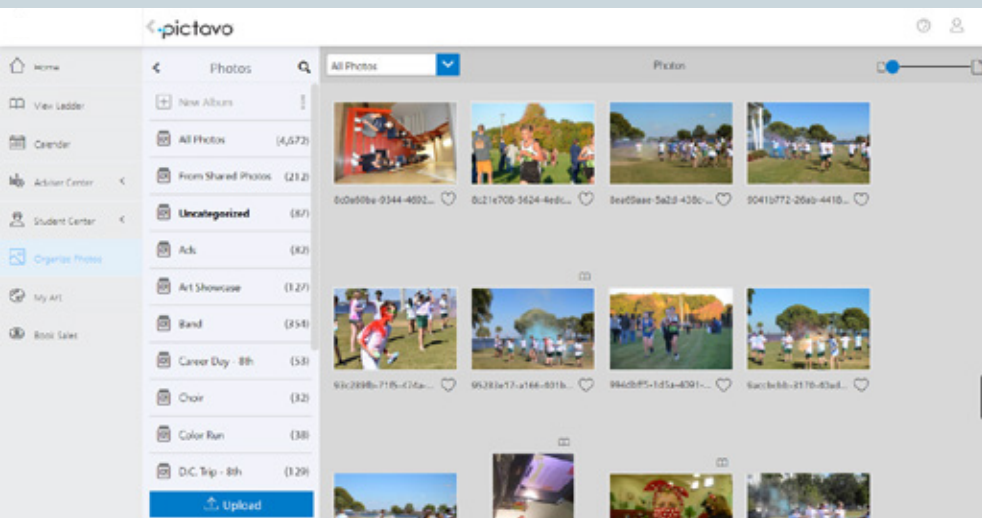
DESIGN BOOK

It doesn't get any simpler than "drag and drop." Everything in Pictavo's industry-leading art library is available with one simple motion. Add templates, page backgrounds, text and more to make your yearbook story come alive.

ORGANIZE PHOTOS

Drag and drop images from your desktop directly into the photo management area or use the traditional upload feature. Choose your best images and keep them organized with multi-layer album organization capabilities. Rename, tag, rotate and preview photos from one convenient window.

PAGE AND LADDER VIEW

ZOOM IN BY SLIDING THE CIRCLE

SELECT YOUR ENTIRE BOOK OR SPECIFIC PAGES TO SHARE A PDF

LEFT NAVIGATION WINDOW

LADDER SECTIONS
Having sections helps you organize your book. Click New Section to name the category, assign pages and users to it as well as pick its color. Sections can be edited at any time.

PRACTICE
Add practice covers and pages to play with design ideas. These pages do not affect your overall page count and will not be submitted. For quick access click on the page number box.

PAGES
The pages of your book appear below practice pages. For quick access to any page, click on the page number. If sections have been created, the page box will appear in that section's specific color.

IN THE LADDER, WHEN A PAGE OR SPREAD IS SELECTED, A BLUE OUTLINE APPEARS AROUND THE THUMBNAIL AND A NEW SELECTION OF ICONS, AND SUBSEQUENT FUNCTIONALITY, BECOMES AVAILABLE.

EDIT
Jump to selected pages' design area

USAGE & TRACKING
View users' activity and cumulative time on the selected page

MOVE
Move selected pages around the ladder

READY FOR APPROVAL
Indicate pages ready for approval

REJECT
Page is not approved

APPROVE
Page is approved

MAKE PRIVATE
Only advisers and trusted users you assign may view a private page

DELETE
Delete selected pages

FULL SCREEN BOOK PREVIEW

FLYOUT
When designing pages, click the Flyout icon to display thumbnails of all pages. From here, navigate to any page without going back to the ladder or using the page advance feature in the top menu bar. Simply double-click a page to open it. To exit, click on the icon again. You will return to the last page on which you were working.

MULTIPLE LADDER VIEWS HELP EASILY NAVIGATE THE BOOK

SUBMIT

SEE PAGE 21 FOR FULL INSTRUCTIONS ON PROOFING, APPROVING AND SUBMITTING.

SORT ICON TO SORT PAGES BY USER OR GROUP, PAGE STATUS OR SECTION.

ADD PAGES ICON TO CHOOSE TYPE OF PAGE, NUMBER OF PAGES AND PLACEMENT.

ASSIGN PAGES TO USERS OR GROUPS

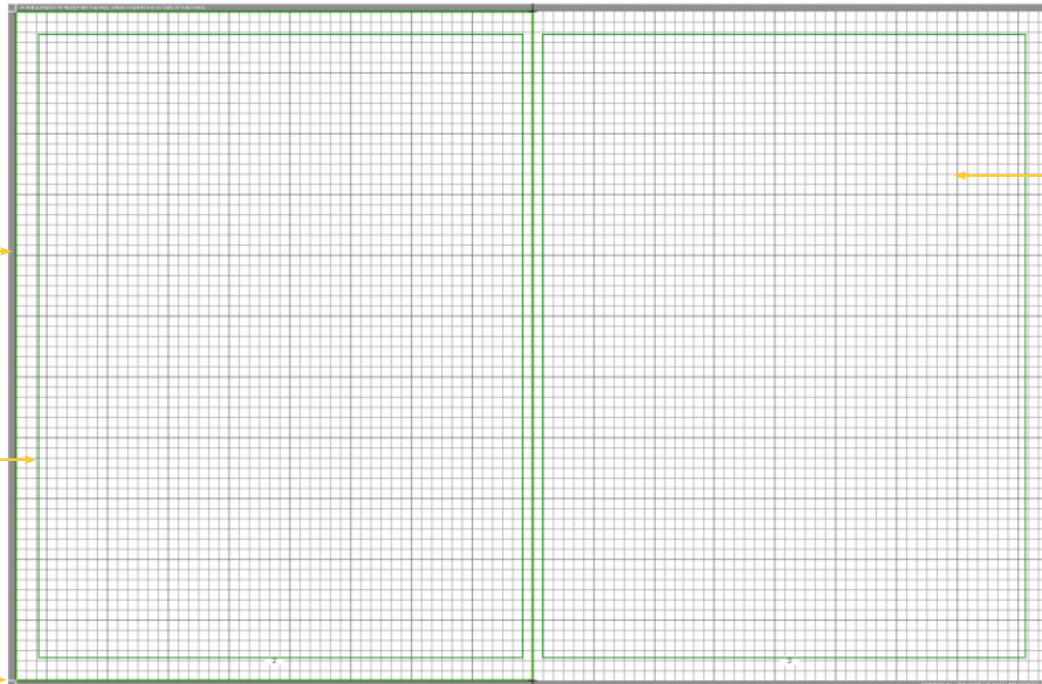# ALL THINGS **WORKSPACE**

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YEARBOOKS

SMART GUIDES
With the hand tool, click and drag on the left and top rulers to add a smart guide to your page. Smart guides will only appear on pages in which they were placed.

LINK PAGES AT THE GUTTER TO DESIGN A SPREAD, OR UNLINK TO DESIGN ONE PAGE AT A TIME

pictavo   of Contents   < 2-3 >   Principal's Message

RULER
Display rulers on the left and top of the workspace to help align spread objects.

GRID
To help with alignment, a non-printing grid appears behind all objects. Grid lines remain visible through backgrounds. You may set the grid to picas or inches.

BLEED
The gray border represents the bleed line. Objects meant to run (or "bleed") off the page must touch the outside edge or extend past the gray line.

PASTEBOARD
The non-printing workspace surrounding a page or spread used to store objects (e.g., images, accents, photo boxes) not yet positioned on a page.

SAFETY MARGIN
The green line around each page represents a safety margin. Keep text and faces in photos inside the green lines to avoid being trimmed off during production.

TRIM
Your pages will be trimmed where the white lines intersect.

GUTTER
The inside edges of the pages (center of the spread) are bound during production, making that area difficult to see. Keep text, faces and important elements outside the gutter.

CHANGE SETTINGS FOR RULERS, TYPE OF GRID, UNIT OF MEASURE AND SMART GUIDES IN THE BOOK SETUP SECTION OF THE ADVISER CENTER.

COMMANDING THE SPACE

CTRL/CMD +
Increase view in 50% increments

CTRL/CMD -
Decrease view in 50% increments

CTRL/CMD 0
Fit spread to window

W
Preview spread without the grid, press again for it to return

SPACEBAR
In the workspace, hold the spacebar down, click and drag to navigate

ZOOMING
Click on the magnifying glass to access zoom features.

- Click the zoom marquee tool, click and drag around the area you want magnified and release
- Click the second icon, the fit to window tool, to view your entire spread
- Use the slider to adjust the zoom setting
- Enter a number in the zoom percentage box

76%

SAVE HISTORY
Revert to previously saved versions of pages.

BACKGROUND
Art designed to fill the entire page, usually with a subtle texture or pattern

TEMPLATE
A pre-designed layout which may include art, photo boxes or a portrait grid

SNIPPET
Interchangeable template pieces to create your own layouts

ACCENT
Individual pieces of artwork to complement your layout

SHAPES
Artwork to embellish your design or change the shape of an image

PHOTO BOXES
Fun shapes in which images can be placed
(Access Photo Boxes in left navigation)

ALL PICTAVO ARTWORK CAN BE VIEWED BY CATEGORY, REGARDLESS OF COLLECTION
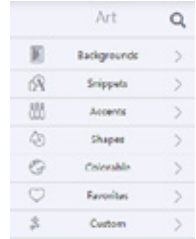
COLORABLE ART
Just like a coloring book! Artwork containing a color wheel icon appears in black and white. Place it on the page and change its colors by using the fill color feature in the Effects palette.
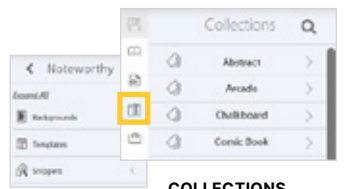
COLLECTIONS
Pictavo offers a variety of art collections (or themes) consisting of coordinating design elements that, when put together, create a cohesive look.

Each collection's artwork is separated into folders by backgrounds, templates, snippets and accents. Simply drag and drop the design onto your page.

CUSTOMIZE YOUR PAGES TO CREATE A LOOK JUST RIGHT FOR YOUR SCHOOL
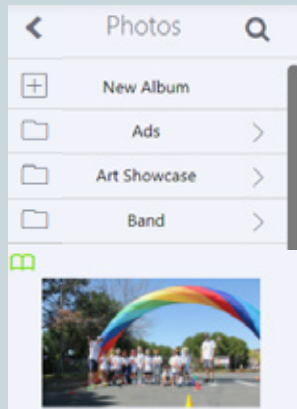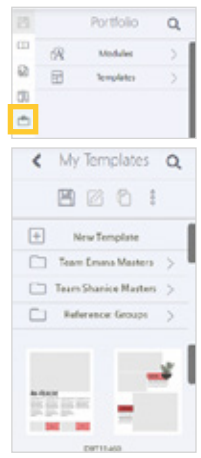
ADDING PHOTOS
Select an image and drag it onto the page. Drop it anywhere on the page or experiment with shapes and photo boxes for added fun. Once on the page, it can be moved around.
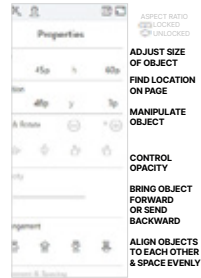
PORTFOLIO
Save custom modules and templates here to easily use elsewhere.

- **MODULES**
  Groupings of interchangeable elements that match our exclusive American Grid™.

- **TEMPLATES**
  Whole-page designs into which you may add photos and copy. Choose from our extensive library or create your own.

PROPERTIES PALETTE
Options affecting the size and location of the object selected.

ADJUST SIZE OF OBJECT

FIND LOCATION ON PAGE

MANIPULATE OBJECT

CONTROL OPACITY

BRING OBJECT FORWARD OR SEND BACKWARD

ALIGN OBJECTS TO EACH OTHER & SPACE EVENLY

ART TOOLS

LINK/UNLINK

COPY

CUT

PASTE

PASTE IN PLACE

LOCK/UNLOCK

GROUP/UNGROUP

EDIT/CROP

SELECT MULTIPLE

CONVERT TO BACKGROUND

REMOVE PICTURE

DELETE

EFFECTS PALETTE
Options to further enhance the object selected.

EFFECTS OPTIONS

CHANGE COLORS OF SHAPES AND BORDERS, ADJUST BORDER THICKNESS

CONTROL BRIGHTNESS, CONTRAST, SEPIA AND BLACK & WHITE (ACCENTS AND BACKGROUNDS ONLY)

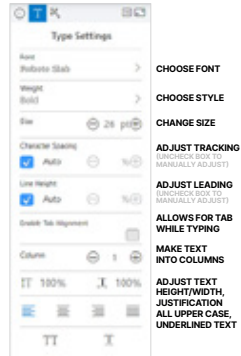APPLY A VISUAL EFFECT AND CUSTOMIZE COLOR, PLACEMENT AND CRISPNESS (ACCENTS, SHAPES AND SNIPPETS ONLY)

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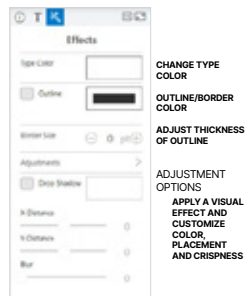YEARBOOKS

TYPE SETTINGS PALETTE
Options affecting font styles within a text box.

Type Settings

CHOOSE FONT
CHOOSE STYLE
CHANGE SIZE
ADJUST TRACKING
(UNCHECK BOX TO MANUALLY ADJUST)
ADJUST LEADING
(UNCHECK BOX TO MANUALLY ADJUST)
ALLOWS FOR TAB WHILE TYPING
MAKE TEXT INTO COLUMNS
ADJUST TEXT HEIGHT/WIDTH, JUSTIFICATION ALL UPPER CASE, UNDERLINED TEXT

TEXT TOOLS

EDIT
COPY
CUT
PASTE
PASTE IN PLACE
LOCK/ UNLOCK
GROUP/ UNGROUP
NOT AVAILABLE FOR TEXT BOX
SELECT MULTIPLE
NOT AVAILABLE FOR TEXT BOX
NOT AVAILABLE FOR TEXT BOX
DELETE

PROPERTIES PALETTE
Options affecting the size and location of the text box selected.

Properties

ASPECT RATIO LOCKED/ UNLOCKED
ADJUST SIZE OF TEXT BOX
FIND LOCATION ON PAGE
MANIPULATE TEXT BOX
NOT AVAILABLE FOR TEXT BOX
BRING TEXT BOX FORWARD OR SEND BACKWARD
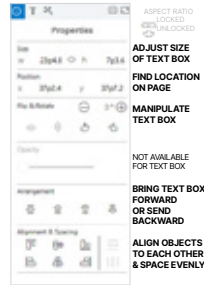ALIGN OBJECTS TO EACH OTHER & SPACE EVENLY

EFFECTS PALETTE
Options to further enhance text.

Effects

CHANGE TYPE COLOR
OUTLINE/BORDER COLOR
ADJUST THICKNESS OF OUTLINE
ADJUSTMENT OPTIONS
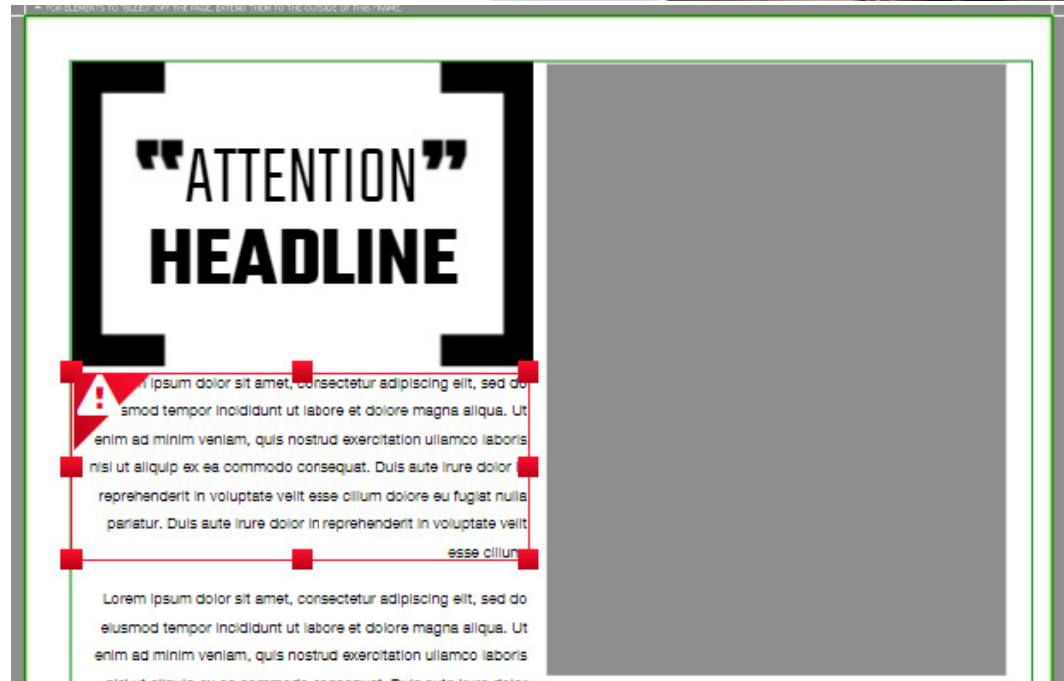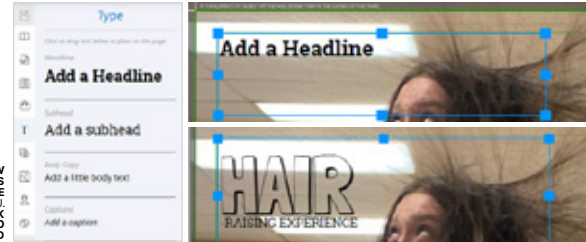APPLY A VISUAL EFFECT AND CUSTOMIZE COLOR, PLACEMENT AND CRISPNESS

Type

Add a Headline

Add a subhead

Add a little body text

Add a caption

ADD NEW TEXT BOXES FROM THE TYPE MENU. DOUBLE-CLICK INSIDE BOX TO GET STARTED

Add a Headline

HAIR
RAISING EXPERIENCE

"ATTENTION"
HEADLINE

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris

COMMON MISTAKES TO AVOID

PLACEHOLDER TEXT
Delete unused text boxes to avoid printing placeholder text, such as "add a headline" or "lorem ipsum" which automatically appear in new text boxes.

SPELL CHECK
When typing in a text box, a red line will appear beneath any word that is not in the browser dictionary.

OVERFLOW TEXT
If your text does not all fit in the text box, a red outline and warning will appear. Extend text box to accomodate type.

BE CAUTIOUS OF TEXT DIFFICULT TO READ DUE TO COLOR CHOICES
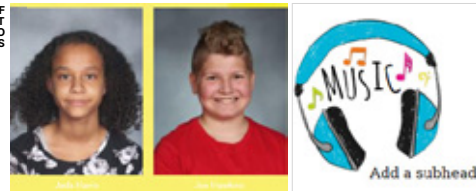
WATCH OUT FOR BOXES STILL CONTAINING DEFAULT TEXT

MUSIC
Add a subhead

ALL THINGS **PORTRAIT LAYOUT**

DESIGNING A PORTRAIT PAGE

ADD DEFAULT PORTRAIT GRID ON PAGE
Open the page you've designated for portraits. Click on the add portrait grid icon in the left navigation to place a default portrait grid onto the page. Use this grid as a placeholder while adding other elements to the page or creating custom templates for later use.

CUSTOMIZE PORTRAIT GRID
The Portrait Settings palette opens when you add a portrait grid to a page. Change number of columns and rows, make name-related selections, alter spacing between portraits, adjust text color, sizing, font style and save selections for future portrait flows.

Note: You can also customize portrait grids after portraits are flowed.

FLOW PORTRAITS
To flow your portraits, select the portrait grid, then click on the flow group icon in the Portrait Settings palette. Select a flow group (groups are directly tied to the portrait database you receive from your photographer). Expand the Change Flow Order menu to include non-students (e.g., principal, teacher) in the flow. Lastly, check the box to flow the portrait group onto multiple pages if needed.
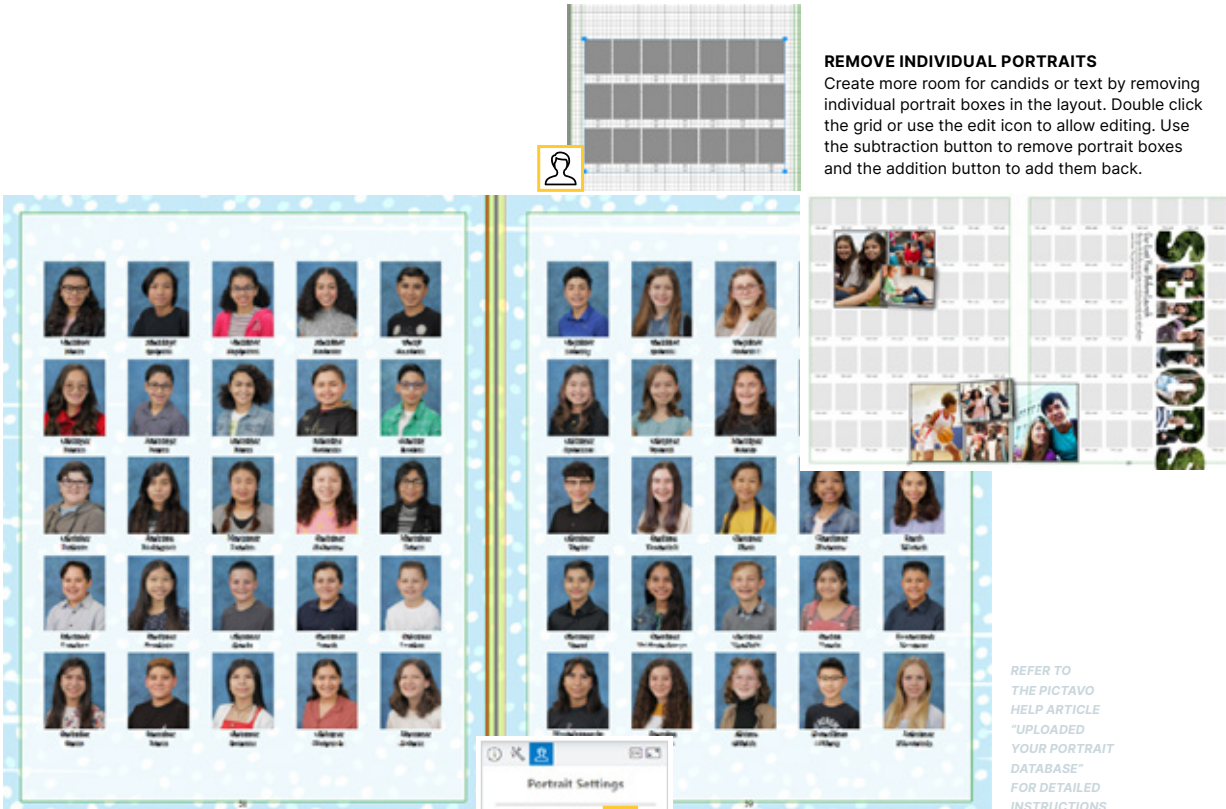
REMOVE INDIVIDUAL PORTRAITS
Create more room for candids or text by removing individual portrait boxes in the layout. Double click the grid or use the edit icon to allow editing. Use the subtraction button to remove portrait boxes and the addition button to add them back.

REFER TO THE PICTAVO HELP ARTICLE "UPLOADED YOUR PORTRAIT DATABASE" FOR DETAILED INSTRUCTIONS.

CLICK THE EDIT ICON OR DOUBLE-CLICK THE PORTRAIT FLOW TO CUSTOMIZE

Portrait Settings

Portrait Columns — 7 +
Portrait Rows — 3 +
Position of Portrait Names
Under
☐ Include Titles with Names
☑ Place Name on Two Lines
Portrait Aspect Ratio
◉ 4×5   ○ 2×3
Vertical Spacing — 3
Horizontal Spacing — 3
☐ Maximize Grid to Page
☐ Remember My Changes for Future Portrait Flows

Portrait Settings

Font
NARROW
Weight
Bold
Size — 10 pt +
Type Color
◉ Black   ○ White
Name Order
◉ First Name Last Name
○ Last Name, First Name
☐ Remember My Changes for Future Portrait Flows

Portrait Settings

Choose Flow Group
No Group Selected
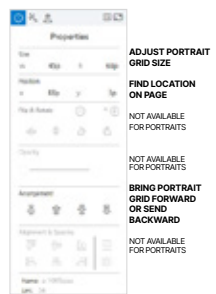Change Flow Order

FLOW GROUPS
After flowing portraits, each flow group will appear in either a Partially Flowed Groups or Flowed Groups list. Pay close attention to the Partially Flowed Groups list — individuals within these groups did not flow onto the page and therefore will not be included in the book.

Choose Flow Group
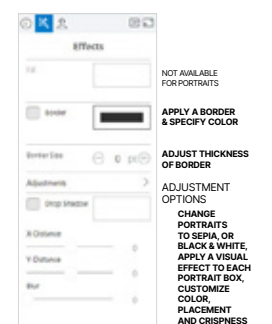○ No Group (Placeholders Only)
Partially Flowed Groups
○ 8 . . . . . (142) Pages 50-54
Flowed Groups
Grade | Homeroom
○ 5 . . . . . (128) Pages 61-63
○ 6 . . . . . (148) Pages 57-61
○ 7 . . . . . (137) Pages 54-57
Flow Portraits

PORTRAIT TOOLS

- ✎ EDIT
- 🔗 LINK/UNLINK
- 📋 COPY
- ✂ CUT
- 📄 PASTE
- 📑 PASTE IN PLACE
- 🔒 LOCK/ UNLOCK
- NOT AVAILABLE FOR PORTRAITS
- ⬚ EDIT/ CROP
- NOT AVAILABLE FOR PORTRAITS
- SELECT MULTIPLE
- NOT AVAILABLE FOR PORTRAITS
- NOT AVAILABLE FOR PORTRAITS
- 🗑 DELETE

PROPERTIES PALETTE
Options affecting the size and location of the portrait grid on the page.

Properties

- **ADJUST PORTRAIT GRID SIZE**
- **FIND LOCATION ON PAGE**
- NOT AVAILABLE FOR PORTRAITS
- NOT AVAILABLE FOR PORTRAITS
- **BRING PORTRAIT GRID FORWARD OR SEND BACKWARD**
- NOT AVAILABLE FOR PORTRAITS

EFFECTS PALETTE
Options to further enhance portrait boxes and/or portraits.

Effects

- NOT AVAILABLE FOR PORTRAITS
- **APPLY A BORDER & SPECIFY COLOR**
- **ADJUST THICKNESS OF BORDER**
- **ADJUSTMENT OPTIONS CHANGE PORTRAITS TO SEPIA, OR BLACK & WHITE, APPLY A VISUAL EFFECT TO EACH PORTRAIT BOX, CUSTOMIZE COLOR, PLACEMENT AND CRISPNESS**

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AVOID THESE PORTRAIT MISTAKES

PORTRAITS WITH PLACEHOLDER TEXT FOR NAMES AND PORTRAIT GRIDS RUNNING OFF THE PAGE

PORTRAIT NAMES EXTENDING OUTSIDE THE GREEN SAFETY MARGIN RISK BEING TRIMMED OFF

TEXT DIFFICULT TO READ BECAUSE OF COLOR CHOICES, DARK OR BUSY BACKGROUNDS AND ART OBSCURING NAMES AND PORTRAITS
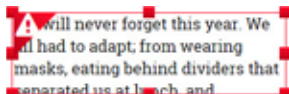
KNOW THE WARNING TYPES
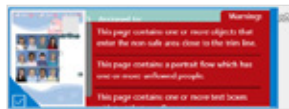
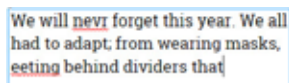**SEE A LIST OF WARNINGS FOR EACH PAGE IN LADDER VIEW**

TEXT BOX EXTENDS OUTSIDE GREEN SAFETY MARGIN

HEADLINE DOESN'T FIT INSIDE TEXT BOX

BODY COPY DOESN'T FIT INSIDE TEXT BOX

WORD EITHER MISSPELLED OR NOT FOUND IN DICTIONARY
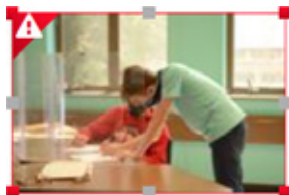
IMAGE IS LOW RESOLUTION AND SHOULD BE REPLACED WITH A HIGHER QUALITY IMAGE
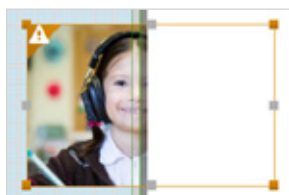
OBJECT EXTENDS PAST GREEN SAFETY MARGIN AND MAY BE TRIMMED DURING PRODUCTION

NOT ALL PORTRAITS IN FLOW GROUP APPEAR

PAGE PROOFING

Before submitting your book, proof it thoroughly.

- Make sure each student and faculty member is shown in the portrait section only once.
- Ensure names and images are not obscured by art, objects nor dark or busy backgrounds.
- Check spelling and punctuation accuracy, paying close attention to student names, the name of your school as well as the words "principal" and "sophomore."
- Check the table of contents for accurate page numbers and section titles.
- Watch for page numbers overlapping text or images.

ENLIST TEACHERS TO PROOF NAMES. USE THE SHARE & PDF FEATURE IN THE LADDER SECTION TO EMAIL PORTRAIT PAGES TO THEM. THEY KNOW IF ALL STUDENTS ARE ACCOUNTED FOR AND IF NAMES ARE SPELLED CORRECTLY.

PAGE SUBMISSION

You may submit pages once the status is marked approved. To ensure your ship date, submit them on or before your due date. You can find this in the project specifications section of the Adviser Center.

As one final check, Pictavo alerts you to any portraits not flowed as well as text and/or image warnings still in place. Exit the submission process and address warnings.

YOU'RE AWESOME
We know the time, effort and care you invested creating this book for your community.
You've made history
and we applaud your efforts.
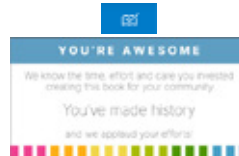
PAGE APPROVAL PROCESS

Only advisers can ultimately approve pages. Additional users have the ability to mark pages ready for approval, letting the adviser know when their pages are complete.

READY FOR APPROVAL
USERS SELECT THE COMPLETED PAGES AND CLICK THE CHECK MARK

This status is represented by green bars in ladder view and green dots in thumbnail view.

PAGE APPROVED
ADVISER SELECTS THE COMPLETED PAGES AND CLICKS THE THUMBS UP TO GIVE FINAL APPROVAL ON PAGES READY FOR PRODUCTION

This status is represented by blue bars in ladder view and blue dots in thumbnail view.

CHECK THE GUTTER
Keep text, faces and other important elements outside the center of the spread (also called gutter). Otherwise, they will be impacted during the book binding process.
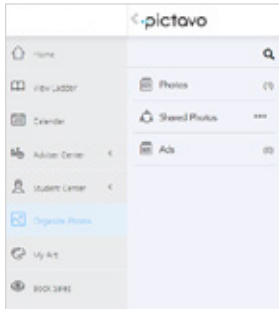
ORGANIZE PHOTOS

PHOTO CATEGORIES

PHOTOS
Photos uploaded by you and your staff. Photos can be uploaded from your system or Google Drive directly into the All Photos album to be organized later or into specific albums you've created.

SHARED PHOTOS
Photos contributed through YBKpix. Enable photo sharing in Organize Photos. Users authorized to view photos uploaded through YBKpix can view them in the Shared Photos album.

ADS
Student or business ads created and submitted through Buy the Yearbook. This folder displays only if your school is selling ads using Buy the Yearbook.
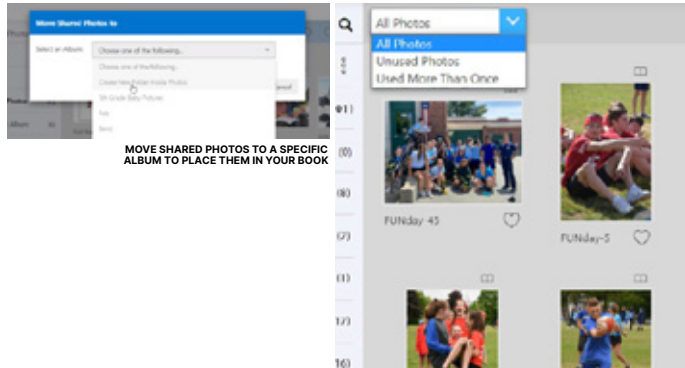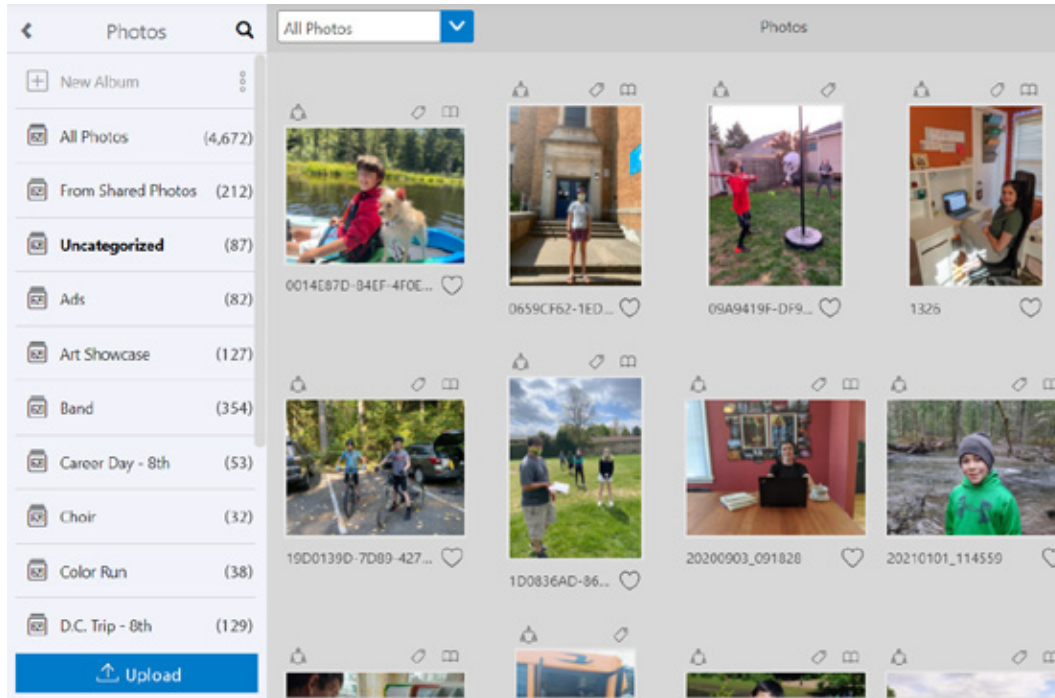
MOVE SHARED PHOTOS TO A SPECIFIC ALBUM TO PLACE THEM IN YOUR BOOK

USE THE DROP-DOWN MENU TO SHOW UNUSED PHOTOS OR PHOTOS USED MORE THAN ONCE

TAGGING PHOTOS WINDOW
Displays only when a photo is selected. Identify individuals in photos for coverage reporting and indexing.

ALBUMS
Categorizing photos will save you time. There's no right or wrong way to do it.

- Images dragged directly onto a page, versus being uploaded into an album first, appear in the Uncategorized album.

- Create sub-folders from within an album. Click on New Album and title it.

- Create album topics ahead of time in Photos and Shared Photos (to help those using YBKpix).

- If you know you're not going to use certain shared photos, place them in the hidden album so they don't appear when searching images.

- Student and business ad albums exist for all ad sizes. When ads are submitted, the file will be placed in its corresponding album. All ads submitted will also be placed in the All Ads album.

SELECT AN IMAGE TO ENABLE PHOTO TOOLS

SELECT
A photo will have a blue border and check box to signify it has been selected

FAVORITE
Favorite a photo to add a copy to the Favorites album

ROTATE
Rotate an image 90° in either direction

HIDE
Hide images from being seen by users (only available in Shared Photos)

EDIT NAME
Rename photos so they are easier to find later

TAG
Tag an image with a student's name and event keywords

DOWNLOAD
Save images to your computer

PREVIEW
Show larger preview of selected image

DELETE
Delete selected images

ORGANIZE PHOTOS

WHAT IS YBKPIX?

PHOTO SHARING PLATFORM
YBKpix is our safe and secure website for parents, students and other community members to upload photos for consideration in the book.
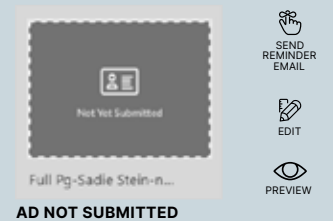
Enable photo sharing by clicking on the three dots to the right of Shared Photos. Then check the Shared Photos Enabled box.

Open Shared Photo Settings to establish a maximum number of photos each user can submit, set an end date for receiving photos and require names of individuals featured in photos.

ASK MEMBERS OF YOUR SCHOOL COMMUNITY FOR THEIR PHOTOS!

87% OF PARENTS SURVEYED IN 2021 SHARED THEY WOULD LIKE TO CONTRIBUTE PHOTOS TO THE YEARBOOK.

ENABLE
PHOTO
SHARING
AND
ADJUST
SETTINGS

AD STATUS
When ads are purchased through Buy The Yearbook, there are three indicators with corresponding necessary tools.

Full Pg-Sadie Stein-n...

AD NOT SUBMITTED

SEND REMINDER EMAIL

EDIT

PREVIEW

Full Pg-Charles Emerson C...
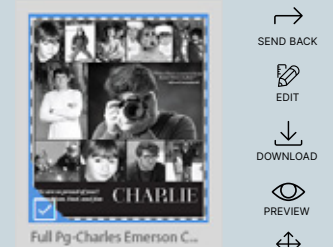
AD SUBMITTED
Note: If the thumbnail says "No High Res Images," the ad has been submitted and is still uploading.

SEND BACK

EDIT

DOWNLOAD

PREVIEW

MOVE TO PHOTOS

Full Pg-Sadie S...
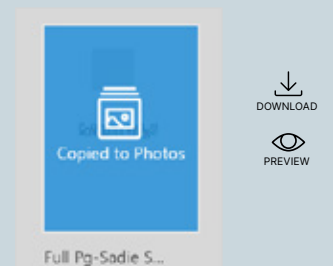
AD COPIED TO PHOTOS

DOWNLOAD

PREVIEW

MANAGE MY BOOK
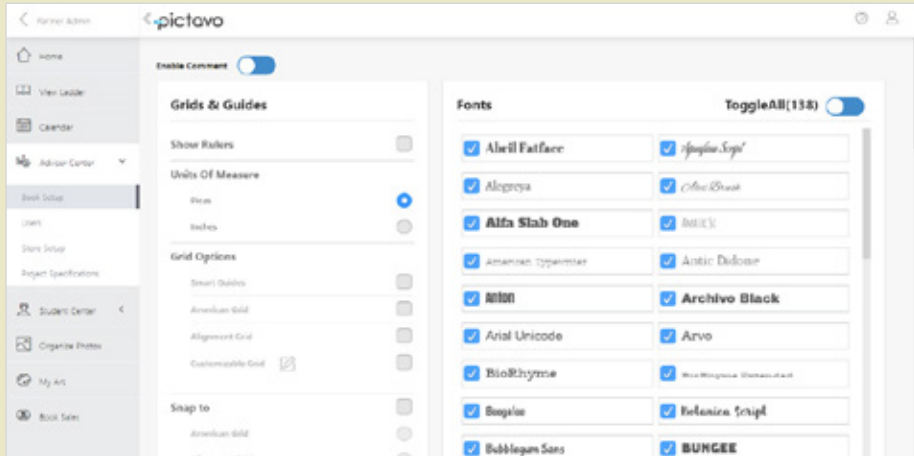
ADVISER CENTER

Select artwork, colors, fonts and workspace settings. Create users and groups, access store setup for online sales and view project specifications.

CALENDAR

Keep everyone organized, capture events you don't want to miss and assign tasks to users.

STUDENT CENTER

Upload and manage student data and portraits. Add and delete students, correct misplaced portraits and monitor coverage.
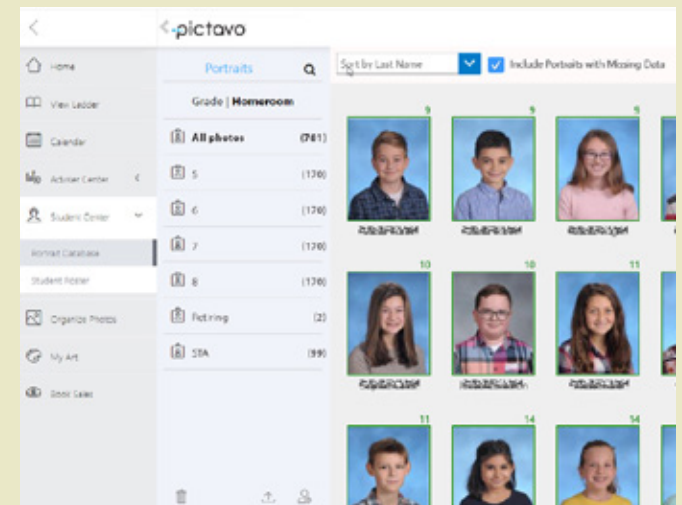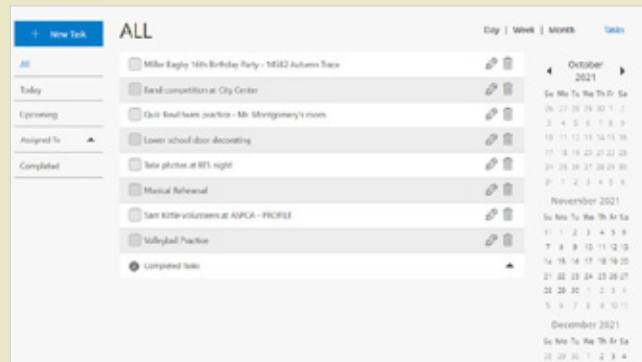
ALL THINGS **BOOK SETUP**
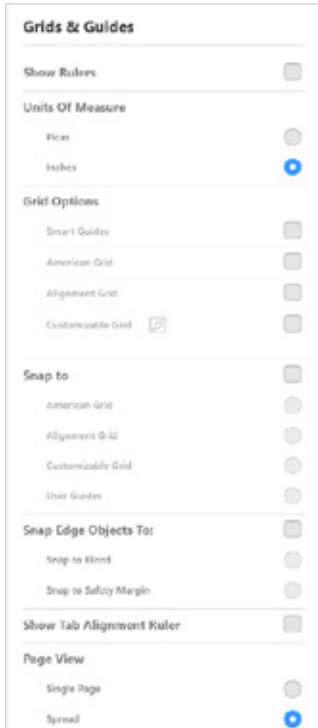
RULERS
Displayed at the top and left side of the workspace.

UNITS OF MEASURE
Option selected will be reflected on the grid and in rulers.

TYPES OF GRIDS
Pick the grid and guides that work best for you.

- **SMART GUIDES**
  Align an edge or center of selected object
- **AMERICAN GRID**
  Advanced grid for creating modular design
- **ALIGNMENT GRID**
  Standard pica grid
- **CUSTOMIZABLE GRID**
  Create your own grid

SNAP TO
To help with alignment of objects, enable Snap To. Move an object toward the grid or guide to "snap" and it will align to it. Show Rulers must be enabled in order to add a guide.

- **SNAP TO BLEED**
  Pulls and aligns objects to the outermost edge of the page to ensure they extend (or bleed) off the page.
- **SNAP TO SAFETY MARGIN**
  Pulls and aligns objects inside the green margin to ensure they will not be trimmed off during production.

TAB ALIGNMENT
Displayed just above a text box, the tab alignment ruler is used to set the spacing between tab stops.

PAGE VIEW
Determines how users will see and design pages — either one at a time or two pages (a spread) together.

ART SETTINGS
Enable only certain designs to ensure a consistent look throughout the book. Doing this will also save time when creating pages because you'll limit the amount of artwork to search through.
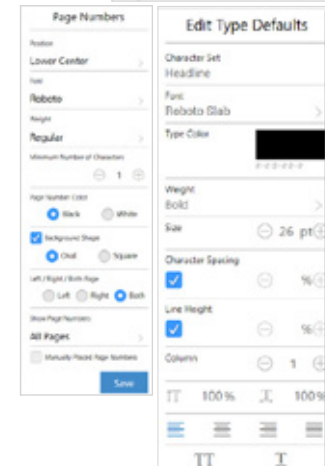
FONTS
Select only fonts you want users to see when creating pages. This ensures users will not pick a font inconsistent with the design and can also help improve overall site performance.

FONT STYLES & PAGE NUMBERS
Create styles for headlines, subheads, body copy and captions by using Font Styles. Taking the time to set this up at the beginning saves time and ensures consistency when users add text to pages. This area also contains font, position, size and shape options for page numbers.

COMMENTS
Enabling comments allows you and other users to add comments to pages. They can be assigned to users and will appear as a task within the user's task list.
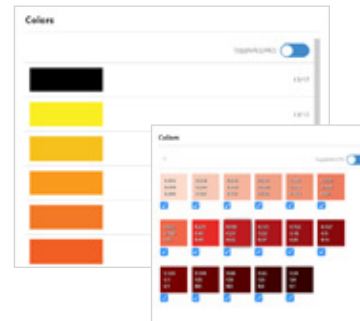
COLORS
Enable only those colors which coordinate with the theme, or art collection, you've chosen or created.

USERS
Manage users and groups for anyone helping with the book. Add and delete users and groups, view their work activity and edit their permissions.

NEW USER
Enter the new user's name, email address and password. Then assign their individual permissions and pages.

NEW GROUP
Create a group name and assign permissions for the members of this group. Assign and unassign users in this window as well.

STORE SETUP
Establish your products and pricing through Store Setup. This section is only available if your school is using Buy the Yearbook. For more detail see pages 32–33 in the Sell My Book section.

PROJECT SPECIFICATIONS
View details about your book (e.g., number of pages, number of books to print, binding type, cover type). Contact your yearbook representative to make changes.

Here, you'll also find due dates for your cover and pages. To keep your originally scheduled ship date you must submit on or before the dates displayed. Status bars indicate your progress.

CALENDAR
Add events and assignments. View by month, week or day. Entries can be set up as one-time or recurring.

ALL THINGS **STUDENT DATABASE**

STUDENT CENTER
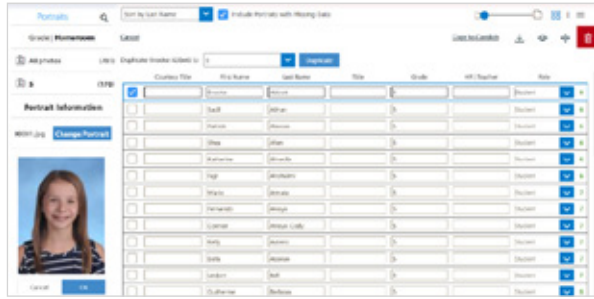
LIST EDIT

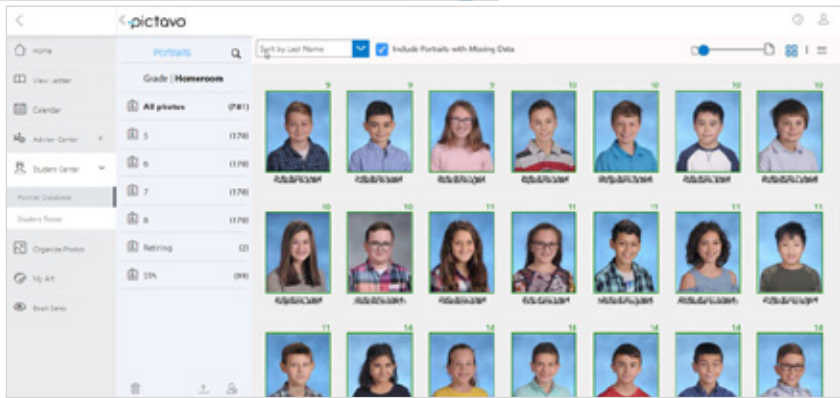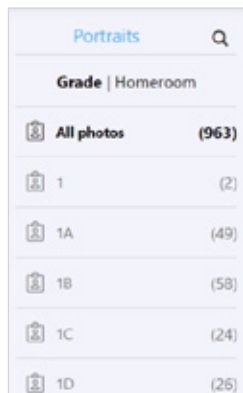## PORTRAIT DATABASE
Your school's photographer will send you the portraits from school picture day. Once portraits have been uploaded to Pictavo, they reside in the Portrait Database within the Student Center.
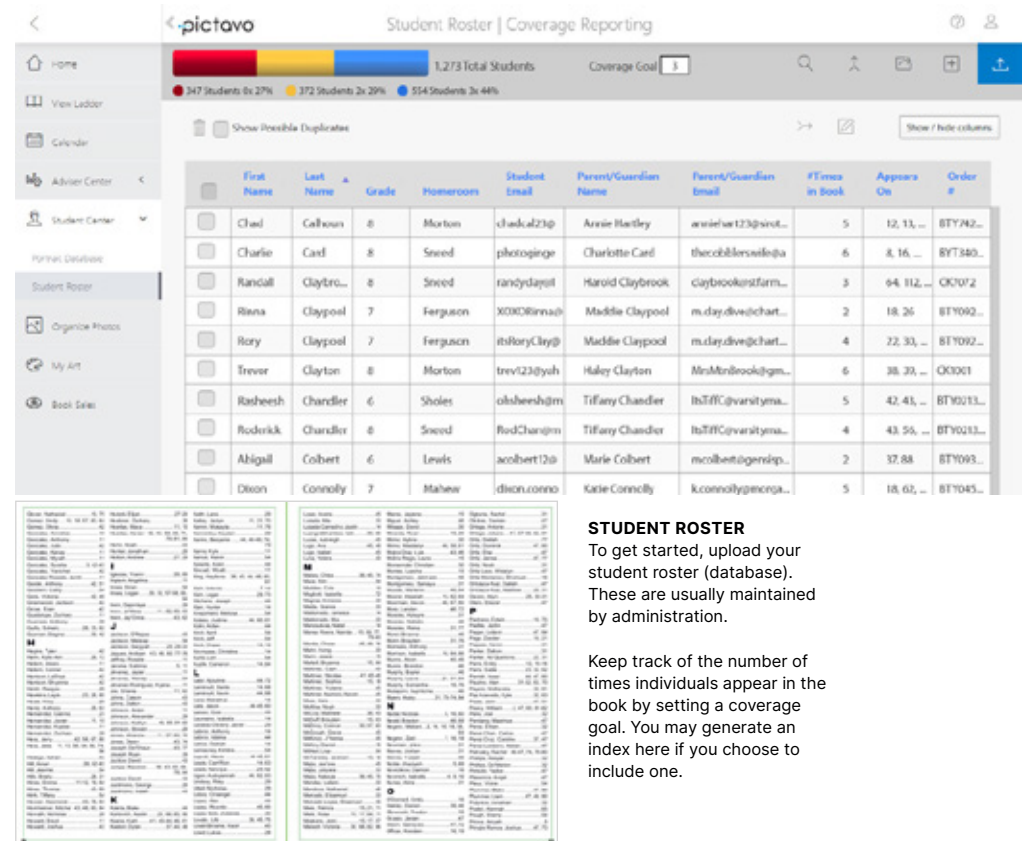
PORTRAIT VIEWS
Portraits may be viewed by Grade or Homeroom. Click either title to change the display.

CHECK OUT THESE PICTAVO HELP ARTICLES:

- UPLOADING YOUR PORTRAIT DATABASE
- EDITING YOUR PORTRAIT DATABASE
- CREATING A NEW PORTRAIT GROUP

INDEX PAGES

STUDENT ROSTER
To get started, upload your student roster (database). These are usually maintained by administration.

Keep track of the number of times individuals appear in the book by setting a coverage goal. You may generate an index here if you choose to include one.

PERMISSIONS
Access to student roster and portrait database is permission based. If a user does not have permissions, they will have read-only access to the portrait database, and student roster will not display.

CHECK OUT THESE PICTAVO HELP ARTICLES:

- HOW TO FLOW AN INDEX
- COVERAGE REPORTING: WHERE DO I BEGIN?
- TAGGING IMAGES

SELL MY BOOK

STORE SETUP

Establish pricing, define products available for and set ordering deadlines.

BOOK SALES

Orders received through Buy the Yearbook appear in the book sales report. Enter cash and check orders so you can track sales progress toward your goal and generate a complete list of orders which comes in handy on distribution day.

Book Sales

OAK HILL MIDDLE SCHOOL | 510 Books | 334 Ads | 22 Products | 168 This Week | 24 Today | $30,950.00

Total Orders | Total Sales

Product Offered	Number of Products Ordered				Sales			
	Credit Card	Cash	Check	Total Orders	Credit Card	Cash	Check	Total Sales
Yearbook	347	35	128	510	$8,675.00	$875.00	$3,200.00	$12,750.00
Full-Page Business Advertisement	36	2	8	46	$2,700.00	$150.00	$600.00	$3,450.00
Half-Page Business Advertisement	48	0	0	48	$2,400.00	$0.00	$0.00	$2,400.00
Quarter-Page Business Advertisement	42	0	2	44	$1,470.00	$0.00	$70.00	$1,540.00
Eighth-Page Business Advertisement	45	0	0	45	$1,125.00	$150.00	$600.00	$1,875.00
Full-Page Recognition Ad	42	5	15	52	$3,150.00	$375.00	$1,125.00	$4,650.00
Half-Page Recognition Ad	12	0	0	48	$2,400.00	$0.00	$0.00	$2,400.00
Quarter-Page Recognition Ad	16	4	8	28	$560.00	$140.00	$280.00	$980.00
Eighth-Page Recognition Ad	12	5	6	23	$300.00	$125.00	$150.00	$575.00
Shoutout Ad	22	0	0	22	$330.00	$0.00	$0.00	$330.00
								$30,950.00

Store Setup

☑ Enable Buy The Yearbook Sales   **School Information**   Products   Community User

School Information

You've enabled online sales. In order to sell items online, you will need to complete the information below.

After you complete this, be sure to add your products in the Products area above.

Service Fee

IMPORTANT: Each purchaser will be charged a 5% service fee on each credit card transaction. When setting the price of your book, please take into consideration that this 5% service fee will automatically be deducted from the purchase price of the item before tax. You can choose to display this fee directly to the purchaser or include it in the purchase price.

○ Include the service fee in order total (WILL NOT display to purchaser)   ● Display service fee in cart (WILL display to purchaser)

Grade/Homeroom

When customers purchase products from your online shop they must choose a student recipient. For your tracking purposes, purchasers may also be asked to select a grade or homeroom for their student if you add them here.

● Create a Grades Menu for Purchasers   ○ Create a Homeroom Menu for Purchasers

Edit	6	X
Edit	7	X
Edit	8	X

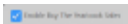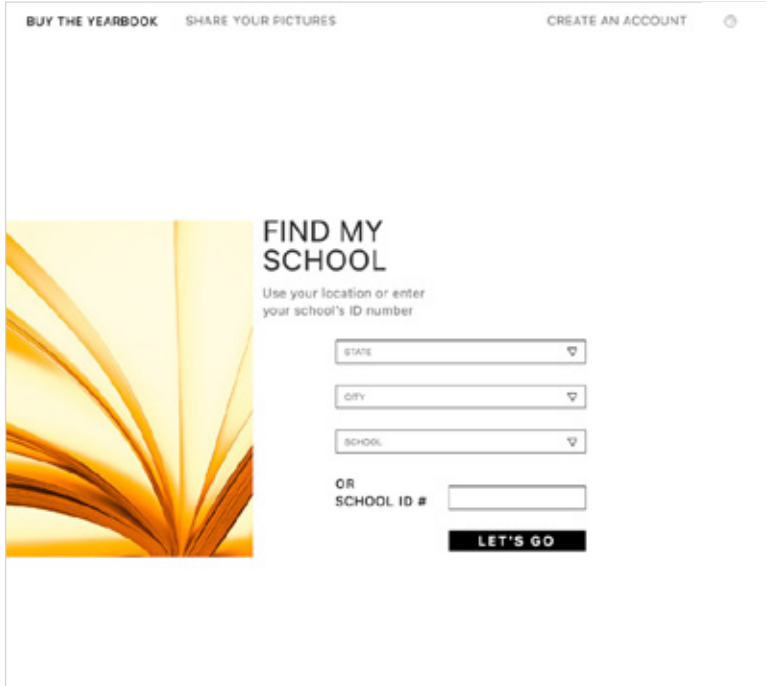# ALL THINGS **BUY THE YEARBOOK**

WHAT IS BUY THE YEARBOOK?

SALES PLATFORM
Buy The Yearbook is a secure e-commerce site fully integrated with Pictavo. Parents, students and other community members can purchase yearbooks, student ads and business ads as well as design ads.

If Store Setup does not appear on the home page or in the Adviser Center, and you wish to use Buy the Yearbook, contact your yearbook representative.

SETTING UP YOUR STORE
Check the box enabling Buy the Yearbook sales. You're required to read through information detailing sales tax and service fees.

BUY THE YEARBOOK USERS
View and export the names and email addresses of users who have created accounts on Buy the Yearbook.
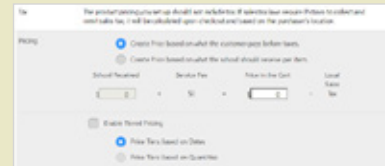
PRODUCTS OVERVIEW
Define the product offering available to purchasers on Buy the Yearbook.
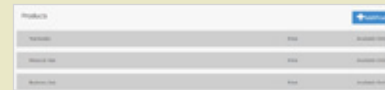
START BY CLICKING THE ADD PRODUCT BUTTON.

SET AN ORDER DEADLINE. THIS MESSAGE WILL DISPLAY TO REGISTERED USERS AFTER THE DEADLINE HAS PASSED. YOU MAY CUSTOMIZE THIS MESSAGE.
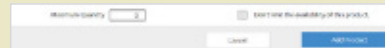
SET A PRODUCT PRICE. ENABLE TIERED PRICING IF YOU PLAN TO ALTER THE PRICE OF THE YEARBOOK AFTER A CERTAIN TIME.
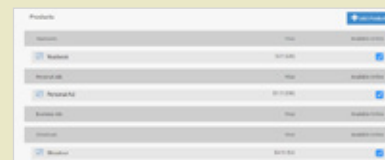
**SELECT THE PRODUCT CATEGORY AND TYPE OF PRODUCT. YOU CAN CUSTOMIZE THE PRODUCT NAME AND DESCRIPTION.**

CUSTOMIZE A DELIVERY MESSAGE TO INFORM YOUR CUSTOMERS WHEN AND HOW BOOKS WILL BE DELIVERED.

SET THE MAXIMUM NUMBER OF PRODUCTS AVAILABLE FOR PURCHASE OR CHOOSE NOT TO LIMIT PRODUCT AVAILABILITY.

CLICK THE CHECK BOX TO THE RIGHT OF THE PRODUCT TO MAKE IT AVAILABLE ONLINE.
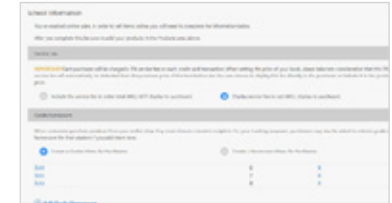
SCHOOL INFORMATION OVERVIEW

SERVICE FEE
Each purchaser is charged a 5% service fee per credit card transaction. The service fee is automatically deducted from the purchase price of the item before tax (if applicable). Indicate your preference for how the fee is displayed—as a separate line item or included in the purchase price.

GRADE/HOMEROOM
Select your preference for grade or homeroom and enter descriptions. Customers purchasing products must select one. This aids in tracking and distribution.

REIMBURSEMENT CHECKS
Funds received from credit card orders may be reimbursed on a monthly basis. If you are unable to enter information into the fields, contact your representative.

TAX RATE
Marketplace laws require sales tax to be collected and remitted in certain states. The tax rate displayed is for your school's location. However, the rate charged is based on the location in which the purchaser resides and calculated at checkout so it could differ from the percentage shown.

DISCOUNT CODES
You may wish to offer discounts for certain purchasers. Create a promo code, select the discount percentage and click save.

ALL THINGS **SALES**

MANAGING ORDERS

EDIT COLUMNS
Select the data to appear in the order report.

TRASH
Delete manually entered orders.

ADD SALE
Add orders received from check or cash sales.

UPLOAD ORDERS
Use our Excel template to enter off-line orders in the correct format.

DOWNLOAD INVOICE
Select an order to download a PDF of the invoice.

SORT
Change order view by product, payment type, grade or date.

EDIT
Edit order details and add notes.

EXPORT
For distribution, export an order report.

SALES GOAL
Set a goal for the number of yearbooks you wish to sell and track your progress toward achieving it. Enter a number into the Sales Goal box and click Go.

Sales Goal: 225 Yearbooks Go!

CURRENT SALES TOTAL
At a glance summary of total orders received by product category, as well as total revenue generated.

ORDERS
Details for each individual order can be found in the Orders section.

PRODUCTS
View orders and sales dollars by individual product category. If you choose to enter off-line sales (cash or check orders), total sales dollars are broken out for ease of reconciling.

Product Offered	Number of Products Ordered				Sales			
	Credit Card	Cash	Check	Total Orders	Credit Card	Cash	Check	Total Sales
Yearbook	347	35	128	510	$8,675.00	$875.00	$3,200.00	$12,750.00
Full-Page Business Advertisement	36	2	8	46	$2,700.00	$150.00	$600.00	$3,450.00
Half-Page Business Advertisement	48	0	0	48	$2,400.00	$0.00	$0.00	$2,400.00
Quarter-Page Business Advertisement	42	0	2	44	$1,470.00	$0.00	$70.00	$1,540.00
Eighth-Page Business Advertisement	45	0	0	45	$1,125.00	$150.00	$600.00	$1,875.00
Full-Page Recognition Ad	42	5	15	52	$3,150.00	$375.00	$1,125.00	$4,650.00
Half-Page Recognition Ad	12	0	0	48	$2,400.00	$0.00	$0.00	$2,400.00
Quarter-Page Recognition Ad	16	4	8	28	$560.00	$140.00	$280.00	$980.00
Eighth-Page Recognition Ad	12	5	6	23	$300.00	$125.00	$150.00	$575.00
Shoutout Ad	22	0	0	22	$330.00	$0.00	$0.00	$330.00
								$30,950.00

OFFERING PERSONALIZED YEARBOOK COVERS?

PICTAVO GENERATES YOUR NAME LIST.

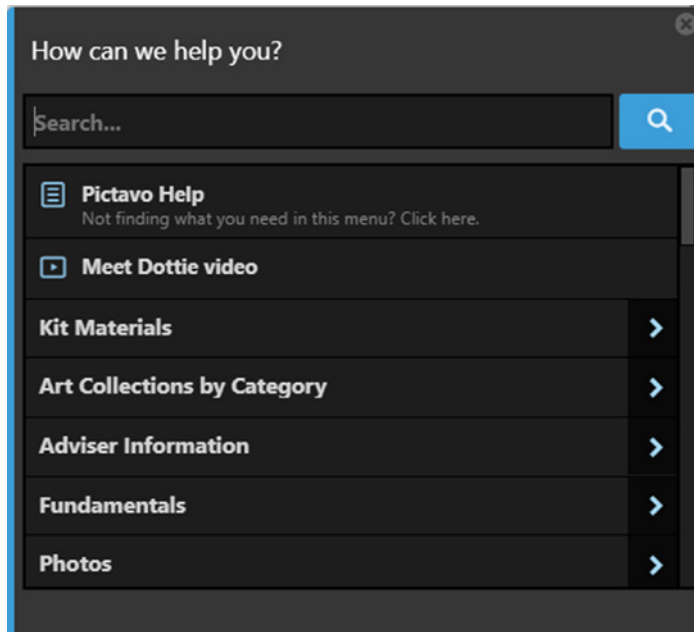*CLICK EXPORT FOR PERSONALIZATION AND SEND THE LIST TO YOUR YEARBOOK REPRESENTATIVE.*

THEY'LL TAKE CARE OF THE REST!

THERE'S ALWAYS **MORE TO LEARN**

?

CLICK ON THE HELP ICON

How can we help you?

Search... 🔍

▤ **Pictavo Help**
Not finding what you need in this menu? Click here.

▶ **Meet Dottie video**

Kit Materials ›

Art Collections by Category ›

Adviser Information ›

Fundamentals ›

Photos ›

HELP WINDOW
Enter your topic in the search field.
Scroll through the list of topics. Click
on an item to view the content. Or click
Pictavo Help to find additional help.

CAN'T FIND WHAT YOU'RE LOOKING FOR? REACH OUT TO THE PICTAVO EXPERTS.

800.290.0036
ANSWERS@PICTAVO.COM

?

irvin simon
YEARBOOKS