

To create Online Design accounts and set up Permissions:

STEP 1: Create a User ID using alpha or alphanumeric characters. Eight characters or more is required for the User ID. Please do not use all numbers for a User ID. Walsworth reserves numbered accounts for school advisers. If a User ID already exists in our database, you will be prompted to modify your requested User ID.

STEP 2: Create a first-time password for login. The password must be six characters or more. Best security practice: If you use “yearbook” as your default startup password, please advise all students to change their passwords after a successful login.

STEP 3: Determine the role you want the staff member to play. Under Permissions, you may choose Administrator, Editor, Staff, or My permission groups.

Click the radio button next to the default role you wish to assign.

Create new user [X]

Add a profile photo

First name [] Last name []

User ID [] Password []

Permissions

- ☐ **Administrator**
Administrators can do anything in Online Design. [Details](#)
- ☐ **Editor**
Editors can edit any spread and use most management features in Members Only and Online Design, like tracking sales or settings up the yearbook. [Details](#)
- ☒ **Staff**
Staff can work on their assigned spreads. [Details](#)
- ☐ **My permission groups** [All photos and view only](#) ▼

[Set custom permissions](#)

[Set job access \(advanced\)](#)

[Cancel](#) [Create user](#)

Role Descriptions:

Administrator – Full access to all Members Only features, as well as all Online Design functions.

Editor – Limited access to Members Only. Cannot create or edit user accounts. Full access to all Online Design functions, except the ability to submit spreads or upload cover and endsheet art.

Staff – Can only view Live Yearbook in Members Only. Limited access to Online Design functions and can only edit assigned spreads.

My permission groups – If you have defined custom permissions for a group of staff, these will appear as an option from the drop-down arrow.

Set custom permissions – Click this link if you wish to give customized permissions to a specific individual who is not already defined by a permissions group.

Set job access – By default, a user has access to all previous yearbook jobs. Select the current year’s job number to restrict access to only the current year’s yearbook.

STEP 4: After selecting the role, group, custom permissions and/or job access, enter the user’s First name, then Last name in the text boxes provided.

NOTE: If you would like to add a photo or avatar to the new account, click on the blue “Add a profile photo” box at the top of the Create New User interface. JPG images work best.

ONLINE DESIGN PERMISSIONS EXPLAINED:

A checked box means access granted; unchecked means access denied

Set custom permissions Base on ▼

Members Only | **Online Design**

1 Spreads

- a. ☐ Edit all spreads
- b. ☐ Edit assigned, view the rest
- c. ☐ Edit and view assigned only
- d. ☐ View all spreads

2 Photos

- a. ☐ Upload photos
- b. ☐ Change user photo
- c. ☐ Tag students in photos
- d. ☐ Recommend to user
- e. ☐ Recommend for spread
- f. ☐ Move photos
- g. ☐ Rename photos
- h. ☐ Delete photos
- i. ☐ Create and delete topics
- j. ☐ Create albums
- k. ☐ Delete albums

3 Plan book

- a. ☐ Ladder
 - ☐ Make changes
 - ☐ View only
- b. ☐ Create or delete color styles
- c. ☐ Manage Fonts, type styles
- d. ☐ Create or delete master pages
- e. ☐ Create or delete custom templates
- f. ☐ Submit spreads
- g. ☐ Upload cover and endsheet art

4 Communications

- a. ☐ Assign to do's to others
- b. ☐ Read all messages

5 Portraits & Index

- a. ☐ Manage index for spreads
 - ☐ All spreads
 - ☐ Assigned spreads
- b. ☐ Edit student information
- c. ☐ Edit organizations
- d. ☐ Assign photo as portrait
- e. ☐ Flow portraits
 - ☐ All spreads
 - ☐ Assigned spreads
- f. ☐ Flow Index

6 Class management

- a. ☐ Unlock spreads
- b. ☐ Approve spreads

1. Spreads

- a. **Edit all spreads:** User will have full access to all spreads. This user will also have full access to the custom dictionary. This is the only permission that grants access to the custom dictionary.
- b. **Edit assigned, view the rest:** User will have full access to their assigned spreads and the ability to view other spreads through the View all spreads link. This user will also have access to Live Yearbook in Members Only and Online Design.
- c. **Edit and view assigned only:** User will not have access to the Live Yearbook within Members Only or Online Design. The link for Live Yearbook in Online Design will not be displayed. If this option is selected, the View all spreads link will not be displayed on the Home page. Additionally, the Spread Details view will only display the spreads the user has been assigned. Clicking on any spread thumbnail will launch the Spread Details view. If this option is selected, the permission for Flow Index will be grayed out.
- d. **View all spreads:** User will be able to click on the View all spreads link. The Spread Details view will display, but ability to edit will be disabled.

2. Photos

- a. **Upload photos:** User is granted access to upload any photos and the link to the upload interface will display.
- b. **Change user photo:** User can change their user profile photo.

- c. **Tag students in photo:** User can tag a photo.
- d. **Recommend to user:** User can recommend a photo to another user.
- e. **Recommend for spread:** User can recommend a photo for any spread.
- f. **Move photos:** User can move photos from one album to another.
- g. **Rename photos:** User can rename a photo in any album.
- h. **Delete photos:** User can delete any photo.
- i. **Create and delete topics:** User can create and delete photo topics.
- j. **Create albums:** User can create and rename a photo album.
- k. **Delete albums:** User can delete a photo album.

3. Plan Book

- a. **Ladder:** User must select 1 of the 2 options below:
 - **Make changes:** User will have the ability to do everything within the Ladder tab of the Plan Book section, but they will not see the link to Upload Cover and Endsheets art unless they have been granted access to that link.
 - **View only:** User will not have access to the following assignment links and the links will not be displayed for the user:
 1. Titles; Due dates; Staff; Master pages; Color styles; Apply templates; Move spreads; Design settings
 2. When the user tries to select or click on a row in the ladder, nothing will happen.
 3. If the user tries to click on a thumbnail in the ladder, the Spread Details window will launch in View Only status.
- b. **Create or delete color styles:**
 - If the user does not have access to this, the menu tab for **Color Styles** will not display.
 - If the user has access to this, but has **View only** access for the Ladder, the link to **Assign color styles to spreads** will not display.
- c. **Manage fonts, type styles:** If the user does not have access to this, the menu tab for Fonts will not display.
- d. **Create or delete master pages:**
 - If the user does not have access to this, the menu tab for **Master Pages** will not display.
 - If the user has access to this but has **View only** access for the ladder, the link to **Assign master pages to spreads** will not display.
- e. **Create or delete custom templates:**
 - If the user does not have access to this, the menu tab for **Custom Templates** will not display.
 - If the user has access to this but has **View only** access for the ladder, the link to **Apply templates to spreads** will not display.
- f. **Submit spreads:** If the user does not have access to this, they will only be able to view spreads or proofs from the Spread Details window. The user will not see the Submit spreads tab in the Plan Book section. The user will not have access to revert a spread back to Blank status in Page Editor.

g. **Upload cover and endsheet art:**

- If the user has access to this, the link for uploading will be displayed when they are in Plan Book. If the user has access to this but has View only access for the Ladder, this link and the Print Ladder link will be the only links displayed on the right side of the Ladder.
- If the user does not have access to this, the link for uploading will not display when they are in Plan Book.

4. Communications

- a. **Assign To Do's to others:** If the user does not have access to this, they will not be able to create and assign To Do's to other users. They can assign To Do's to themselves.
- b. **Read all messages:**
- If the user has access to this, they can see and read all messages from all users.
 - If the user does not have access to this, they can only see messages they started or have been invited to.

5. Portraits & Index

- a. **Manage index for spreads:**
- **All spreads:** Access allows the user to see the view index link for **all pages**. The view index link displays in the Spread Details window.
 - **Assigned spreads:** Access allows the user to see the view index link for **only** the pages they have been assigned. The view index link displays in the Spread Details window.
- b. **Edit student information:** Access allows the user to see the tab for Students.
- c. **Edit organizations:** Access allows the user to see the tab for Organizations.
- d. **Assign photo as portrait:** Access allows the user to Make a portrait in the Images section.
- e. **Flow portraits:**
- **All spreads:** Access allows the user to flow portraits to **all** spreads.
 - **Assigned spreads:** Access allows the user to flow portraits to **only** the spreads they are assigned.
- f. **Flow Index:** Access allows the user to see the Flow index tab in the **Portraits and Index** section.

6. Class Management

- a. **Unlock spreads:** Access allows the user to unlock/take back editing to all spreads. This only gives access to spreads in the proofing status, not the approved status. This allows any user to unlock a spread that was closed improperly.
- b. **Approve spreads:** If the user does not have access to this, the user will only be able to view the spread or proof from the Spread Details window.