

QUICK
START

 pictavoTM



GET STARTED	2-3
Activate Your Account	
Users and Groups	
YOU ARE HERE	4-5
Pictavo Overview	
ORGANIZE	6-7
Dashboard and Ladder	
PHOTO MANAGEMENT	8-9
Manage My Photos	
REFERENCE	10-11
Icon and Menus Reference Guide	
DESIGN	12-13
Art and Text	
PORTRAITS	14-15
Portrait Flow and Menus	
FINAL STEPS	16-18
Proof and Share	
Approve and Submit	
COMMUNITY	19-21
Setup, Sell and Manage	

WE'RE HERE TO HELP



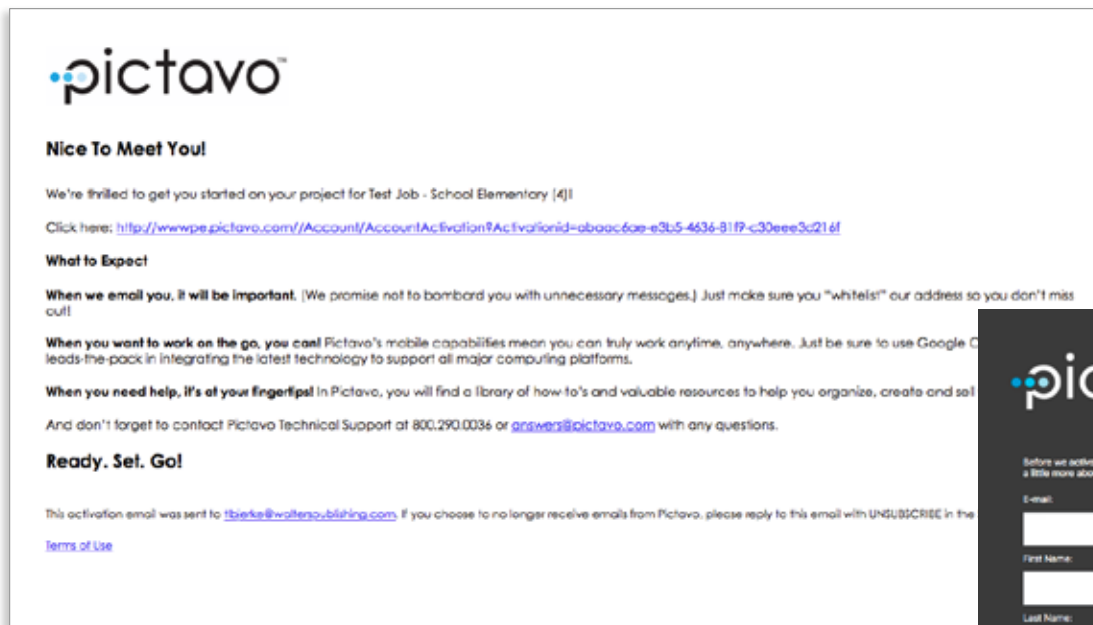
Pictavo is full of robust features and tools to help manage and design a top-notch yearbook. In order to get the most out of Pictavo, this guide will familiarize you with all of the tools our software has to offer.

This symbol indicates helpful tips on where to find more information in Pictavo Help. Watch for it throughout the Quick Start Guide.

GET STARTED

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

pictavo™

Before we activate your book, we'd like to know a little more about you.

E-mail:

First Name:

Last Name:

Password:

Re-type password:

I agree to the Pictavo Terms of Use

Activate

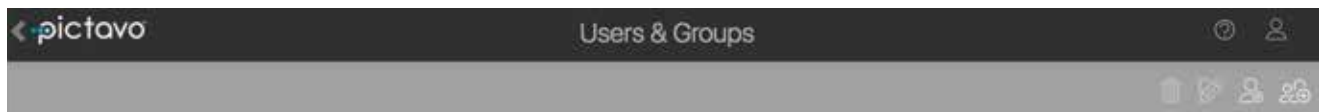
LOGGING IN

Enter contact info and a password to activate your book.



USERS & GROUPS

Pictavo makes it easy to stay organized by creating permissions-based Users and Groups. This allows you to keep track of progress and participation on your project.



SELECT NEW USER OR NEW GROUP TO BEGIN

A **B**

- A NEW USER**
Enter the new user's name, email address and password. Then assign their individual permissions or add them to a group.

- B NEW GROUP**
Create a group name and assign permissions for the members of this group. You can assign and unassign users in this window, as well.

VIEW YOUR TEAM

Come back anytime to quickly see each user's status, edit their permissions and add or delete users or groups.

Have a user or group that has completed their task?
Delete users that no longer need access to the book.

Have a user who now needs to be able to do more?
Edit their permissions to grant more access.



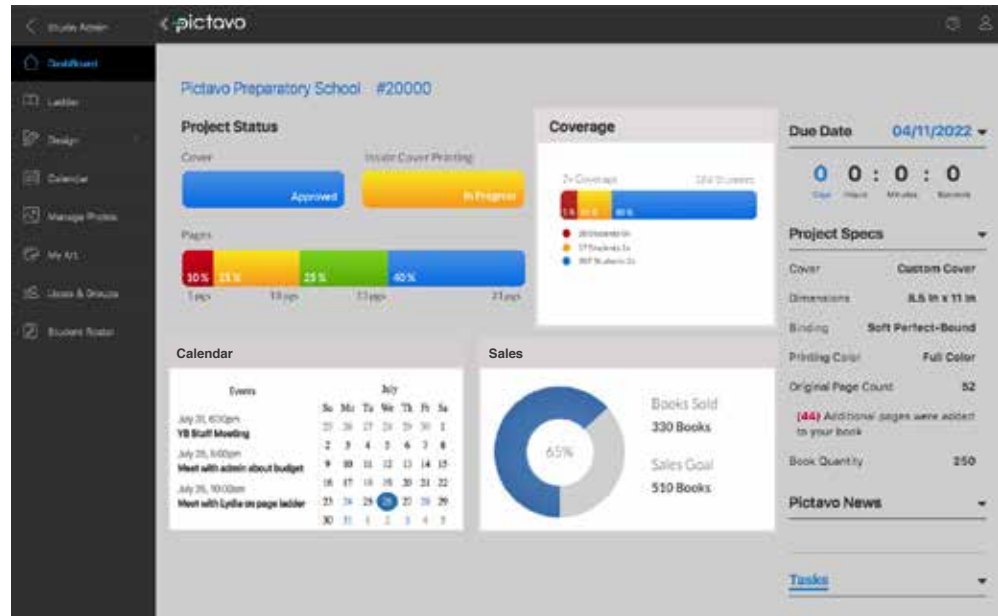
YOU ARE HERE

You're going to spend a lot of time in Pictavo. Get to know the 'environments' you'll likely be spending the most time in. These same areas are frequently referenced throughout the Quick Start Guide.



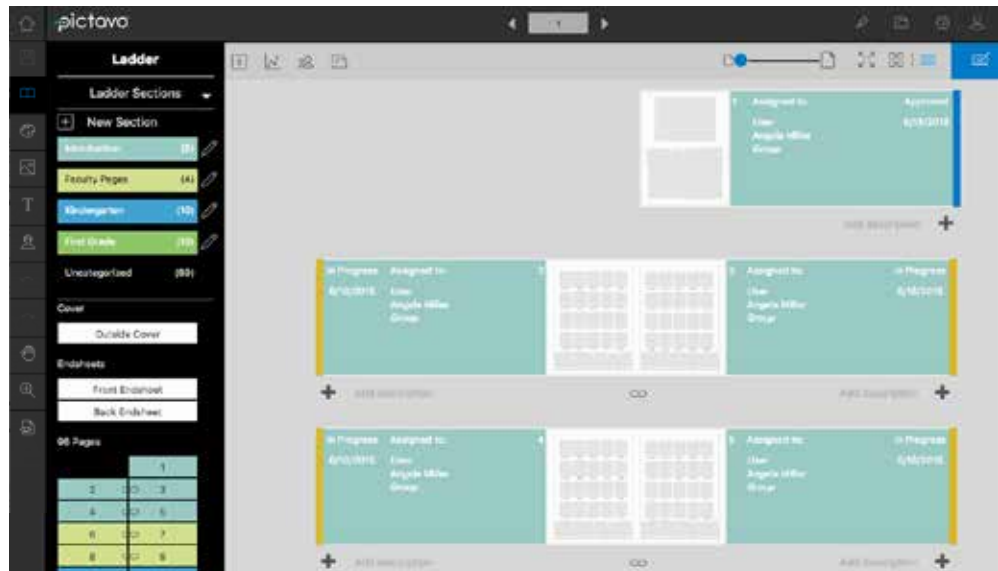
DASHBOARD

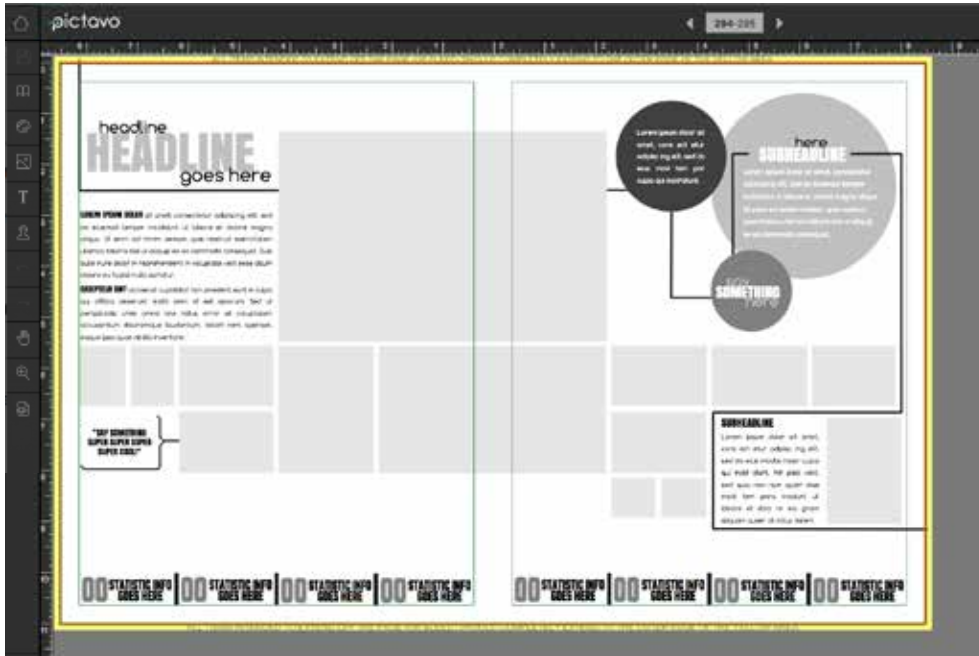
KEEP TABS ON YOUR PROJECT
The Dashboard is a quick look at your project and easy access to project management tools. Here, you'll have access to your calendar to create and assign events or tasks to your staff. As Project Administrator (Admin), you have privileges that others do not like setting up users, assigning permissions and creating groups.



LADDER

CREATE A BLUEPRINT
Pages and sections of your yearbook can be labeled and even color-coded to keep everyone organized. Page assignments, progress and warnings are all visible from the Ladder view. Add pages, track user log ins and share high resolution proofs all with the click of a button. Add practice pages to your project to play with ideas before committing to a page.

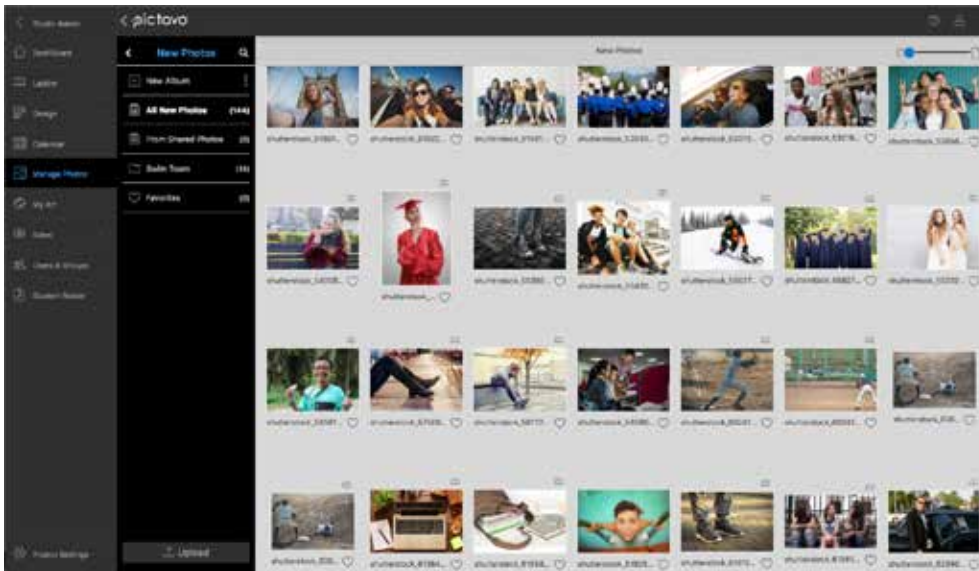




DESIGN

DRAG AND DROP

It doesn't get any simpler than 'drag and drop.' Anything in Pictavo's industry-leading art library is available with one simple motion.



MANAGE MY PHOTOS

GET THE SHOTS, KEEP THEM ORGANIZED

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

ORGANIZE



DASHBOARD

Whenever a user logs in to Pictavo, they will land on the Dashboard. Here you will see not only a snapshot of a project's status, but also the icons that allow users to move easily to other areas of a project.

A PROJECT STATUS THERMOMETERS see an "at-a-glance" status of project progress:



B DUE DATE COUNTDOWN CLOCK your one and only deadline for submitting your pages

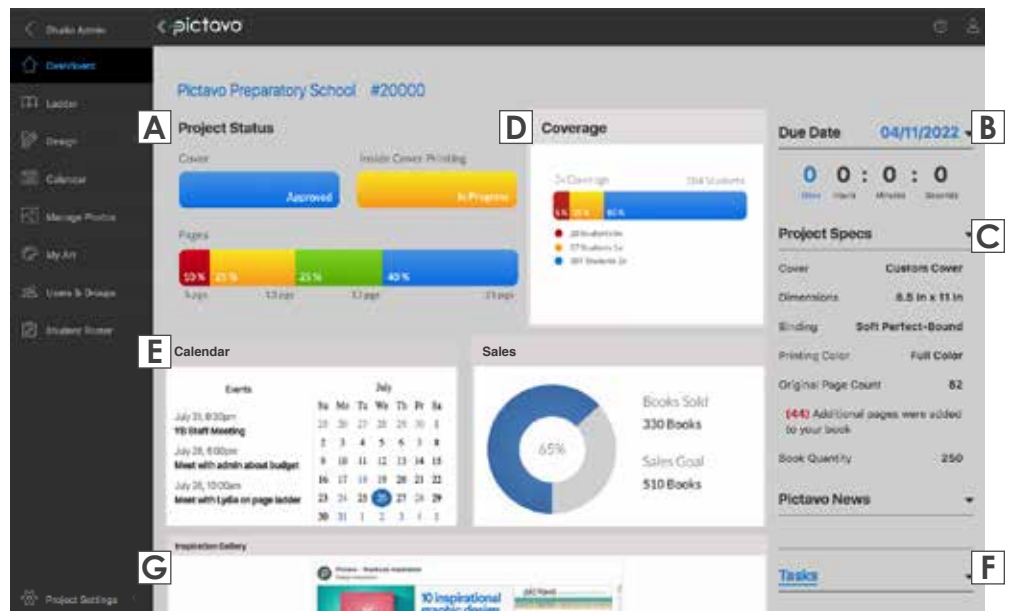
C PROJECT SPECS basic details of your project

D COVERAGE TRACKER monitor student coverage as you build your yearbook

E CALENDAR events and tasks created by staff

F TASKS user specific tasks

G INSPIRATION GALLERY links to Pictavo Yearbook Inspiration boards on Pinterest



NAVIGATE AWAY FROM THE DASHBOARD BY USING THE ICONS IN THE COLUMN TO THE LEFT OF YOUR DASHBOARD VIEW

ORGANIZATIONAL TOOLS

DESIGN PAGES OR COVER

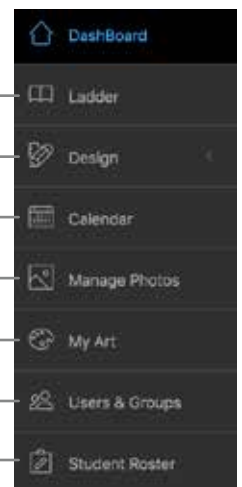
SEE ALL SCHEDULED EVENTS AND TASKS

ORGANIZE YOUR IMAGES INTO ALBUMS

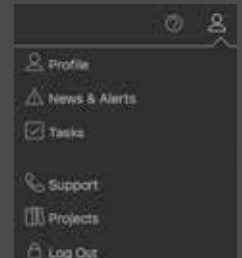
UPLOAD YOUR OWN BACKGROUNDS OR ACCENTS

CREATE USER ACCOUNTS AND ASSIGN PERMISSIONS, PAGES AND/OR GROUPS TO THESE USERS

UPLOAD YOUR STUDENT ROSTER, TRACK COVERAGE AND CREATE AN INDEX FOR YOUR BOOK



THE PROFILE MENU ALLOWS YOU TO MAKE BASIC PROFILE CHANGES, SEE ALERTS, TASKS, AND PICTAVO SUPPORT INFORMATION



READ 'GET TO KNOW THE DASHBOARD' IN PICTAVO HELP FOR A MORE THOROUGH EXPLANATION OF DASHBOARD FEATURES. (BETTER YET, WATCH THE VIDEO FOUND AT THE END OF THE ARTICLE!)



LADDER

The Ladder is both an organizational and collaborative tool. All users can view the Ladder and see an organized, detailed outline of their project including sections, page assignments, color-coding and page status.



- A ADD A NEW SECTION**
assign pages, users and a section color

- B EDIT SECTION INFORMATION**
make changes to section details as your project progresses

- C ADD PAGES**
choose type of page, number of pages and where to place new pages in your book

- D USAGE AND TRACKING**
see user activity including most recent saves and log ins

- E ASSIGN USERS**
assign pages to users connected to your project

- F SHARE AND PRINT**
select your entire book, single pages or ranges to print, PDF or email

- G ADD DESCRIPTION**
add a brief description of page contents under page thumbnails

Once a page or spread is selected, a blue outline will appear around the thumbnail and a new selection of icons make themselves available:



EDIT

JUMP TO THE SELECTED PAGE IN THE PAGE DESIGN AREA

USAGE AND TRACKING

VIEW SAVES AND LOGINS FROM ALL USERS FOR THE SELECTED PAGE

MOVE

MOVE SELECTED PAGES WITH PRECISION BY CHOOSING SPECIFIC PLACEMENT

READY FOR APPROVAL

USERS CAN INDICATE WHAT PAGES ARE WAITING FOR APPROVAL

REJECT

LET A USER KNOW THEIR PAGE IS NOT APPROVED AS IS

APPROVE

LET A USER KNOW THEIR PAGE IS APPROVED

MAKE PRIVATE

ONLY AN ADMIN AND USERS ASSIGNED AFTER A PAGE HAS BEEN MADE PRIVATE CAN VIEW A PRIVATE PAGE

DELETE

DISCARD SELECTED PAGES

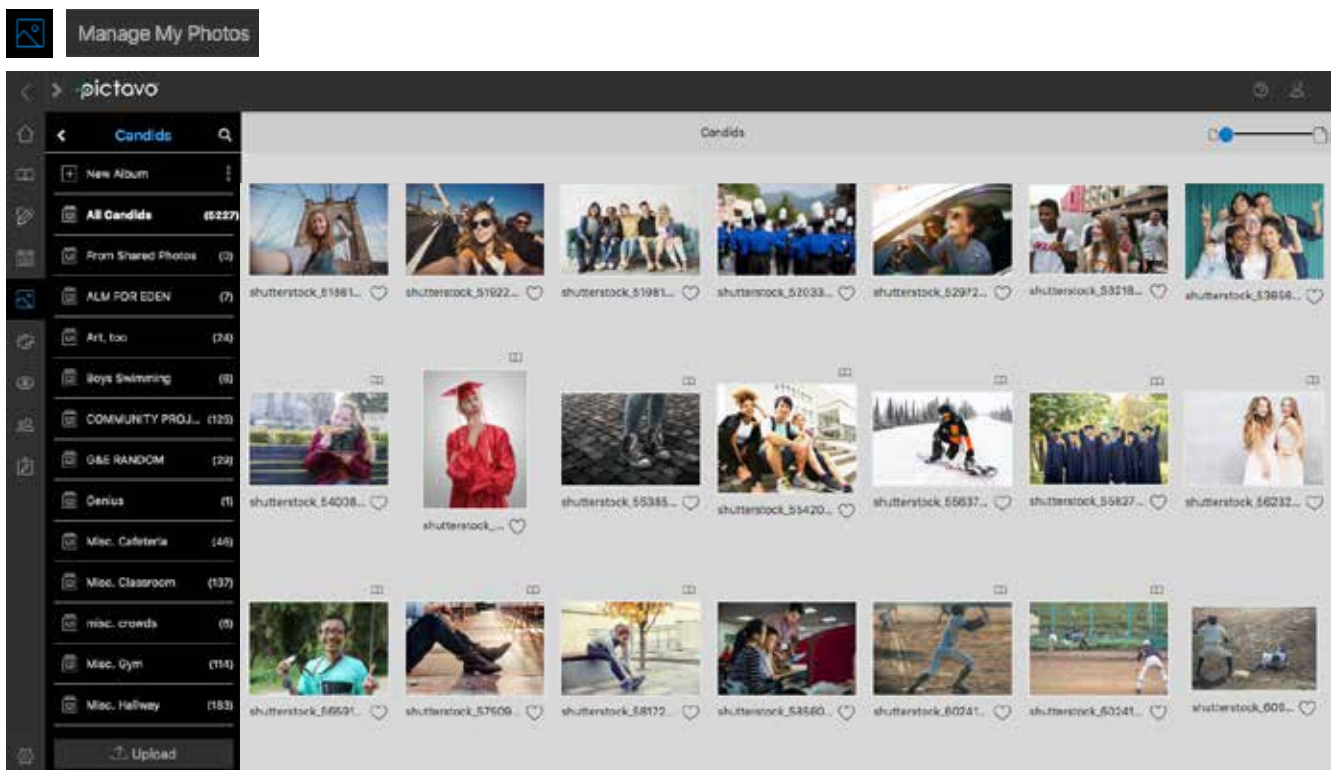


PHOTO MANAGEMENT

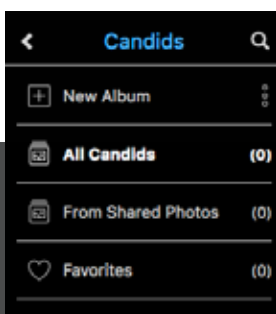


MANAGE MY PHOTOS

Stay organized and work smart with Pictavo's Manage My Photos area. Edit information for both candid photos and portrait database from the Manage My Photos area.



In the **ALL CANDIDS** area, all uploaded candid photos are present even if they're organized into another folder. You can upload images directly to this folder and organize them later by selecting and dragging your images to a folder OR you can upload images to specific folders by navigating to that folder and uploading directly to it. Any images dragged directly onto a page will also live in the Uncategorized album until placed in a specific folder.



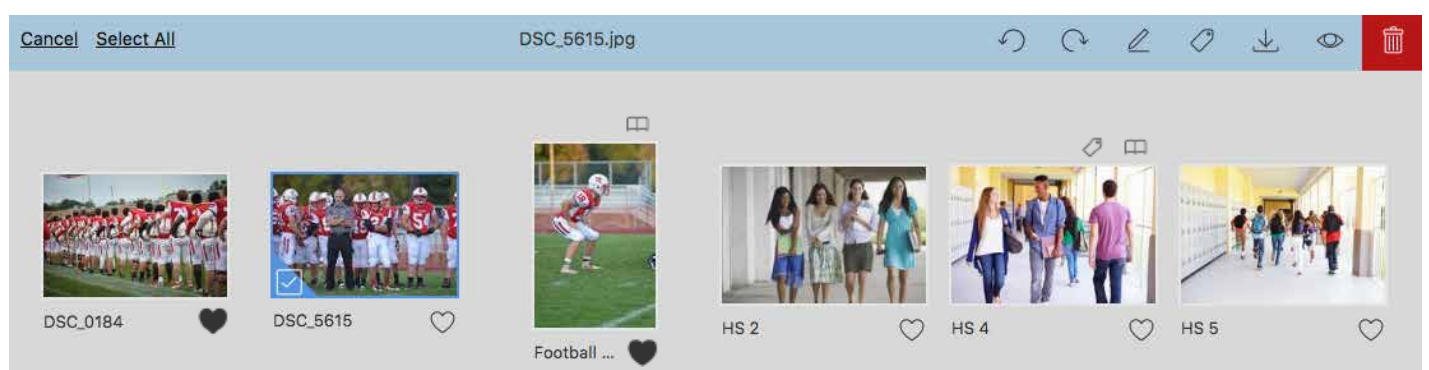
Use the New Album icon to create a new album in any level of your album structure. You can create albums within other albums to help keep your images organized in the way that best suits your project.

Use the Upload button to load candid photos into whatever album is currently selected. If you accidentally load photos to the wrong folder, don't worry—you can easily move them to another album.

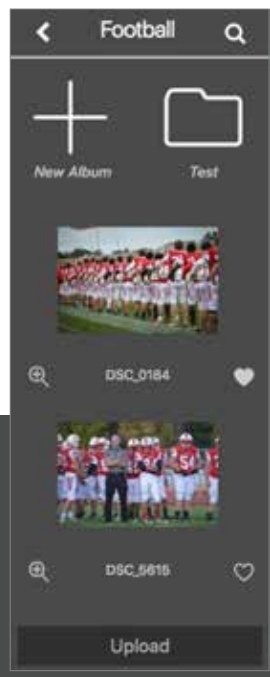


MANAGE MY PHOTOS

The Manage My Photos area is incredibly useful for more than just image organization. Once an image (or in some cases multiple images) is selected, a series of photo management tools make themselves available.



A PHOTO WILL HAVE A BLUE BORDER AND CHECK BOX SIGNIFYING IT HAS BEEN SELECTED	'FAVORITE' A PHOTO TO ADD A COPY TO THE FAVORITES ALBUM	INDICATES PHOTO HAS BEEN USED ON A PAGE	INDICATES PHOTO HAS BEEN TAGGED	ROTATE AN IMAGE 90° IN EITHER DIRECTION	RENAME A PHOTO	TAG AN IMAGE WITH A STUDENT'S NAME OR KEYWORD	DOWNLOAD IMAGE TO YOUR COMPUTER	PREVIEW SELECTED IMAGE	DELETE AN IMAGE



MANAGE MY PHOTOS isn't the only place to upload and organize images. Create albums, favorite images and upload photos from the design screen Photos area.

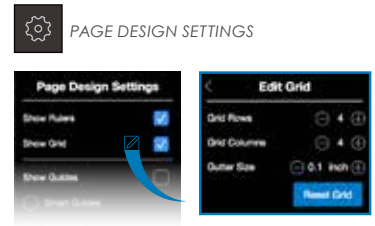


REFERENCE

INTERFACE TOOLS AND ICONS



- SAVE
- PHOTOS
- REDO
- DASHBOARD/HOME
- TEXT
- DRAG
- LADDER
- ADD PORTRAIT GRID
- ZOOM
- ART
- UNDO
- HI-RES PAGE PREVIEW

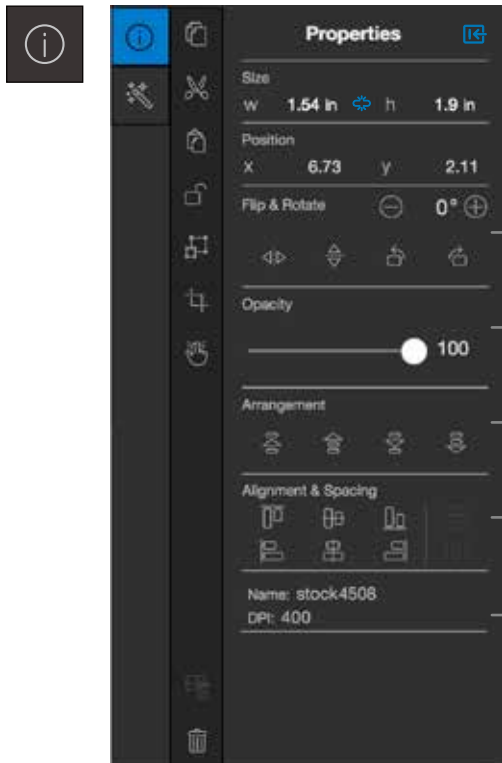


DESIGN PALETTE TOOLS



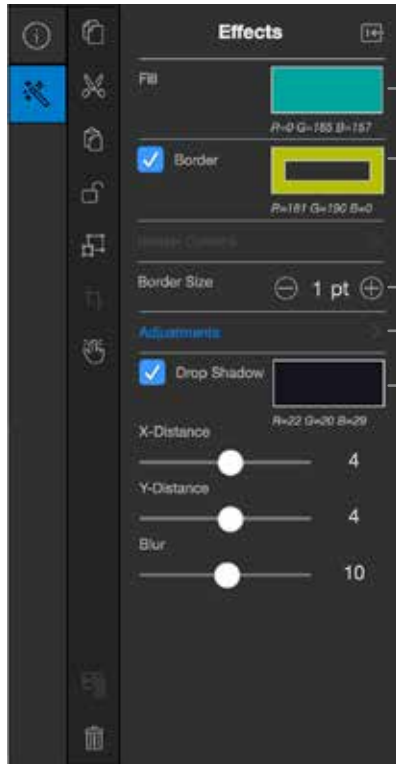
- LINK/UNLINK
- LOCK/UNLOCK
- REMOVE PHOTO
- COPY
- GROUP/UNGROUP
- DELETE
- CUT
- EDIT/CROP
- PASTE
- MULTIPLE SELECT

PROPERTIES



- DOCK/UNDOCK MENU
- CONSTRAIN PROPORTIONS
- FLIP AND ROTATE
- ADJUST OPACITY
- BRING OBJECTS FORWARD OR SEND BACKWARD
- ALIGN OBJECTS TO EACH OTHER AND EVENLY SPACE
- FILE NAME AND RESOLUTION OF FILE IF AN IMAGE IS SELECTED
(for quality printing, the image should be a minimum of 300 dpi)

EFFECTS



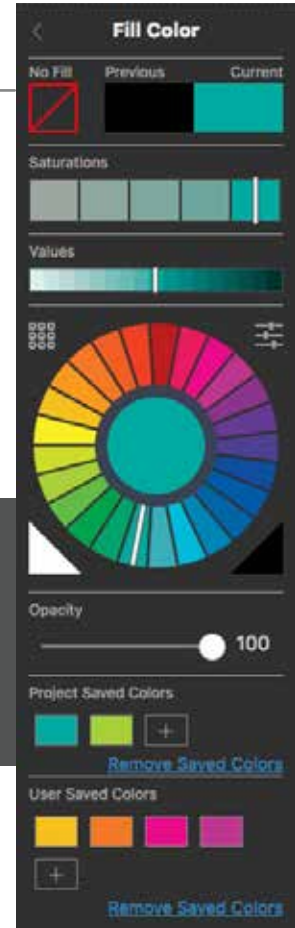
- FILL COLOR
- APPLY A BORDER AND SELECT THE COLOR
- BORDER SIZE
- ADJUSTMENTS (FOR IMAGES)
- APPLY AND CUSTOMIZE A DROP SHADOW TO SELECTED OBJECT

Adjust the value, saturation and opacity of the selected color.

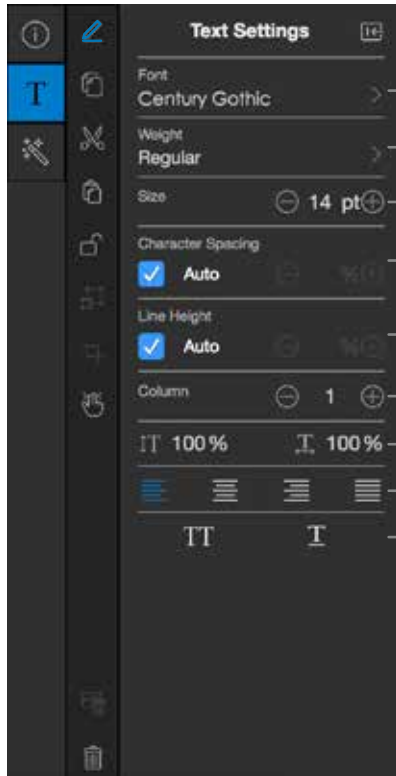
Use the **+** button in Saved Colors to add the current color. Only a project admin can edit the Project Saved Colors.



Click here to see the RGB and CMYK values of your color.



TEXT SETTINGS



- SELECT FONT
- SELECT FONT WEIGHT/STYLE
- INCREASE/DECREASE FONT SIZE
- UNCHECK BOX TO ADJUST SPACING (TRACKING)
- UNCHECK BOX TO ADJUST LINE HEIGHT (LEADING)
- ADD/REDUCE COLUMNS
- ALTER HEIGHT/WIDTH OF TEXT
- ALIGN TEXT
- SET TO ALL UPPER/LOWERCASE TEXT AND/OR UNDERLINED TEXT



DESIGN



Pictavo's extensive library of design elements will help you design a great-looking book, coordinated from start to finish.



BACKGROUND

art designed to fill the entire background of your page; usually with a subtle texture or pattern



TEMPLATE

a pre-designed layout including art, photo boxes and possibly portrait grids



SNIPPET

a mini-template designed to fill only part of a page; found only in Pictavo



ACCENT

small design elements that complement a layout



Become familiar with and learn how to use Pictavo's extensive Art Libraries in the Inspiration Guide found in your yearbook kit.



The **K8 INSPIRATION GUIDE** is loaded with art, templates and Snippets perfect for your pre-school, elementary, middle or junior high school.


The **HIGH SCHOOL INSPIRATION GUIDE** covers the basics of clean, modern yearbook design. Take a look at eight art collections full of professionally-designed templates and Snippets!



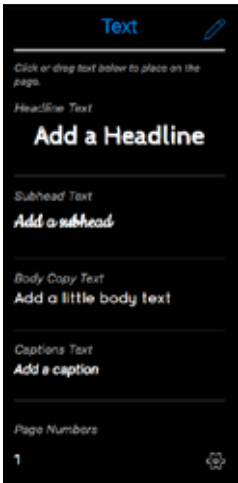
SEARCH THE WORD 'ART' IN PICTAVO HELP FOR A LIST OF ARTICLES ON NAVIGATING ART COLLECTIONS AND LIBRARIES.

T TEXT


Pictavo's text capabilities allow complete creative freedom and total precision when designing with type.



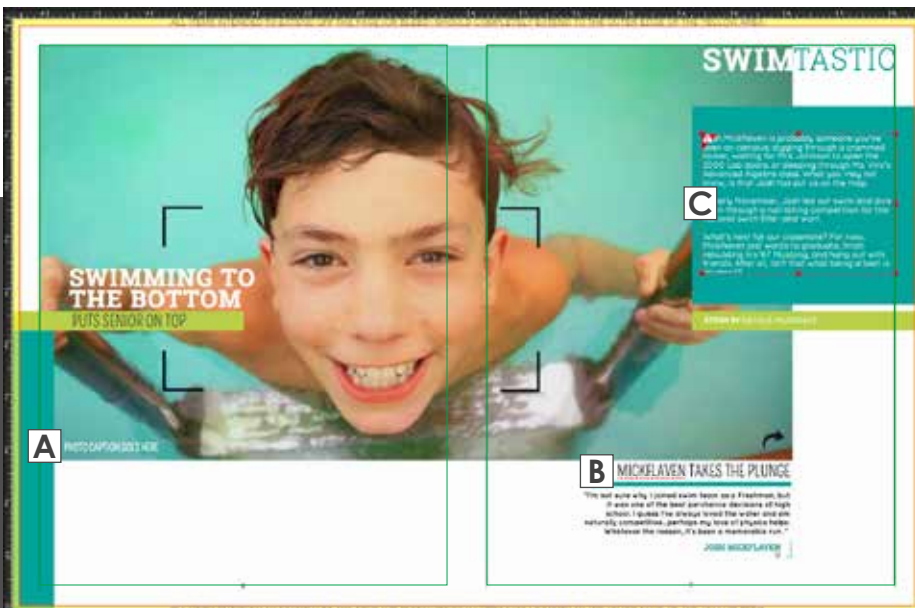
Select the Text icon to open the text panel. Click or tap a text style to add a text box of that style to your page.



Customize everything down to your page numbers—choose font, placement, color and more in the Page Numbers menu.



Edit every aspect of text defaults such as color, character spacing, justification and so much more. With Pictavo's comprehensive and intuitive text options, designing a book with consistent font styles is a snap.



A PLACEHOLDER TEXT
DELETE UNUSED TEXT BOXES TO AVOID PLACEHOLDER TEXT, SUCH AS "ADD A HEADLINE" OR "LOREM IPSUM" THAT AUTOMATICALLY APPEAR IN NEW TEXT BOXES AND IN TEMPLATES.

B SPELL CHECK
WHEN TYPING IN A TEXT BOX, A RED DOTTED LINE WILL APPEAR BENEATH ANY WORD THAT IS NOT IN THE BROWSER DICTIONARY.

C OVERFLOW TEXT
IF A TEXT BOX IS NOT LARGE ENOUGH TO FIT ALL OF YOUR TEXT, THE TEXT BOX WILL BECOME RED AND A WARNING WILL APPEAR IN THE UPPER LEFT CORNER.

PORTRAITS



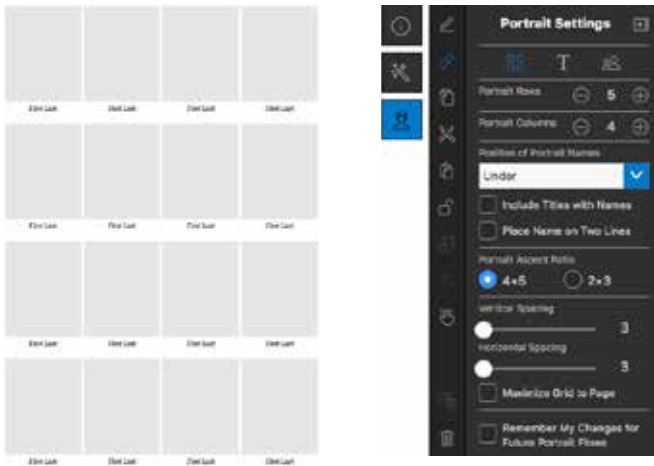
PORTRAIT FLOW

With Pictavo's extensive portrait flow customization options, users can create portrait grids even before their portrait databases are loaded.

The initial step in the portrait flow process is always creating a portrait grid.

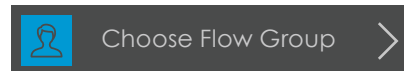


Select the portrait icon. A default portrait grid will appear on your page. Customize portrait grids using the Portrait Settings Menu.

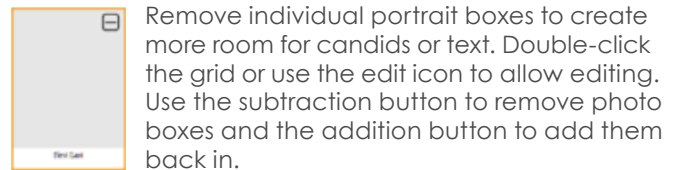


Use the empty grid as a placeholder while designing layouts on pages or custom templates to use later.

If portraits have been uploaded and are ready to flow, click/tap Choose Flow Group in the Portrait Settings menu.



Once portraits are flowed, find more customization options in the various Portrait Settings menus.



PORTRAIT GRID SETTINGS

Portrait Grid Settings

- Portrait Rows: 3
- Portrait Columns: 3
- Position of Portrait Names: Sticky
- Portrait Aspect Ratio: 4x5 (selected), 2x3
- Vertical Spacing: 13
- Horizontal Spacing: 13
- Maximize Grid to Page
- Remember My Changes for Future Portrait Flows

Edit Portraits

Select a portrait in the flow grid to edit it.

John

Abbott

Font: Century Gothic

Weight: Regular

Size: 10 pt

Typeface Color: Black, White (selected)

Choose New Portrait

Click the edit icon or double-click the portrait flow to customize.

PORTRAIT TEXT SETTINGS

Portrait Text Settings

- Font: Quicksand
- Weight: Bold
- Size: 10 pt
- Typeface Color: Black, White (selected)
- Name Order: First Name Last Name (selected), Last Name, First Name
- Remember My Changes for Future Portrait Flows

PORTRAIT FLOW SETTINGS

Portrait Flow Settings

- Choose Flow Group
- 0 Teachers
- 0 Assistants
- 0 Students
- Teacher Flow: Flow First (selected), Flow Last, Do Not Flow
- Assistant Flow: Flow First (selected), Flow Last, Do Not Flow

FINAL STEPS



PROOF

Before submitting your book, proof it thoroughly.
Watch for Pictavo's warning frames alerting you to issues with your layout.

TEXT WARNINGS



PART OF THIS TEXT IS VISIBLY BEING CUT OFF BY THE TEXT BOX
ENLARGE THE BOX TO FIT ALL TEXT



THERE ARE ADDITIONAL LINES OF TEXT THAT ARE NOT
VISIBLE BECAUSE THE TEXT BOX IS TOO SMALL
ENLARGE THE BOX TO FIT ALL TEXT



THIS TEXT BOX EXTENDS PAST THE GREEN SAFETY MARGIN INTO A PART
OF THE LAYOUT NEAR THE TRIM OR BINDING AREA OF A SPREAD

Pictavo

A RED UNDERLINE SHOWS WORDS NOT FOUND IN THE BROWSER DICTIONARY

IMAGE/ART WARNINGS



THIS ART/IMAGE IS LOW RESOLUTION AND WILL PRINT POORLY
REPLACE WITH HIGH-QUALITY ART/IMAGE



THIS IMAGE/OBJECT EXTENDS PAST THE GREEN SAFETY MARGIN INTO A
PART OF THE LAYOUT NEAR THE TRIM OR BINDING AREA OF A SPREAD



THIS PORTRAIT FLOW CONTAINS ADDITIONAL IMAGES
IN THE FLOW GROUP THAT HAVE NOT BEEN FLOWED YET
FLOW THE REMAINING IMAGES

COMMON THINGS TO PROOF FOR

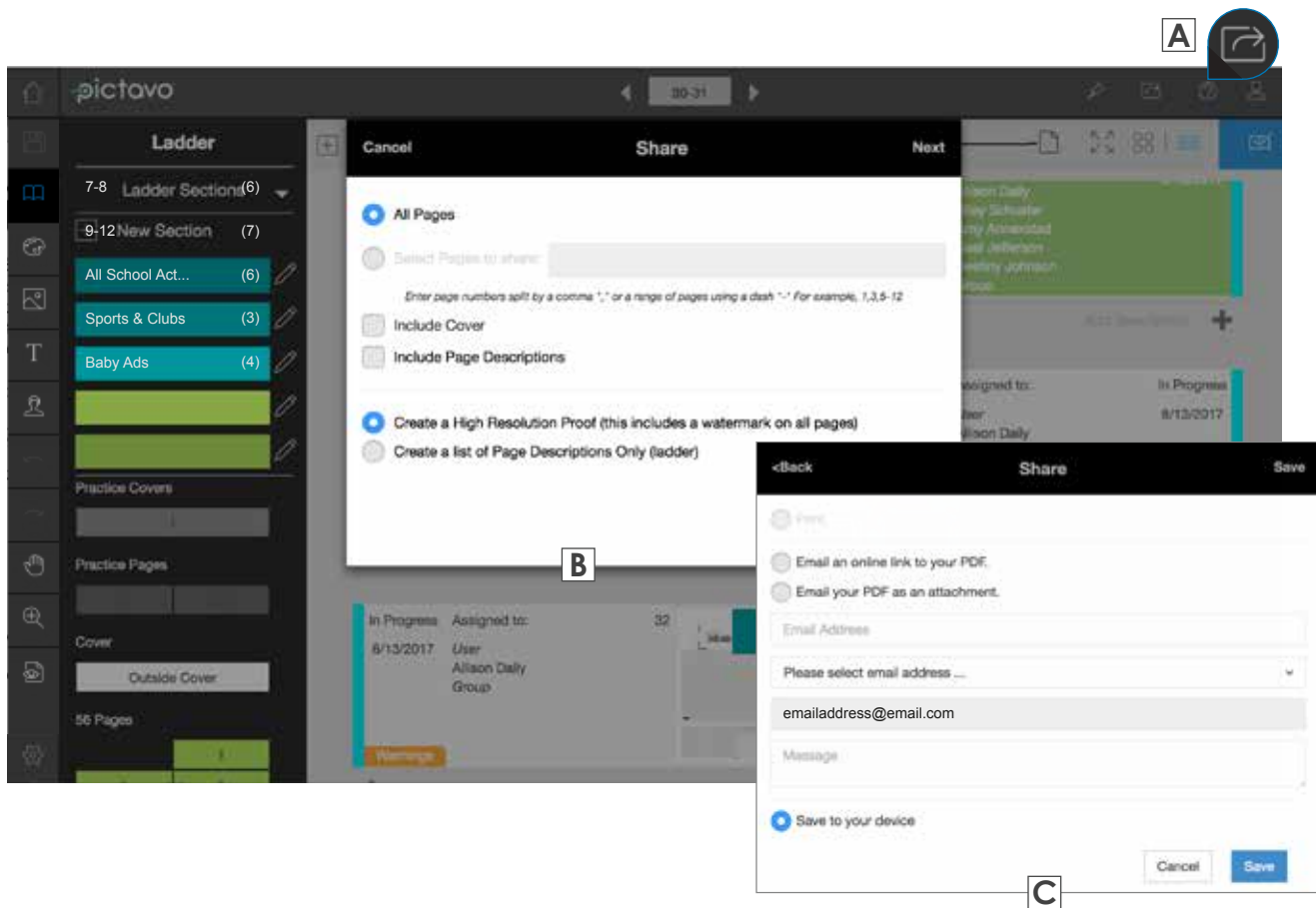
- Make sure each student and faculty member is present in the portrait flow, shown only once, and their name is spelled correctly.
- Check that names and photos in the portrait flow are not covered by other objects and are easy to read against the page background.
- Check for spelling and punctuation accuracy.
- Common misspellings include your school name, and the words: principal, sophomore, and Dr. Seuss.
- Check the Table of Contents for accuracy.
- Avoid page numbers overlapping text/images.





SHARE/PRINT PAGES & CREATE A PDF

Print or share current versions of your pages with faculty and administration for proofing purposes or create previews of exciting layouts for sales campaigns.



A SHARE

The Share button (accessible from the Ladder, Cover or Page Designer) will allow users to print pages and generate proof PDFs to save or send to others for proofing.

B SELECT

Select specific pages, page ranges or all pages to include in your proof. Choose what type of file to share.

C PRINT OR SAVE

Choose to print selected pages, generate a PDF and email as a link or attachment, or save the current state of selected pages to your device to print or share outside of Pictavo.



FINAL STEPS



APPROVE AND SUBMIT

Once a book is finished, each page needs to be approved by the Admin before book submission. Page approval and submission happen in the Ladder.



READY FOR APPROVAL

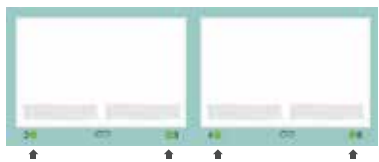
Team members working on a book should mark completed pages as ready for approval.

Pages that need to be approved will have a green bar down the outside edge of the page information box (in list view)



OR

a green dot beneath the page (thumbnail view).



APPROVE PAGES

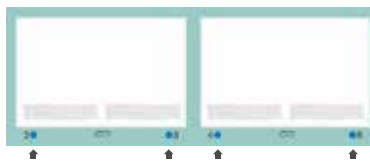
A project Admin can review pages ready for approval and mark them as approved or rejected.

Approved pages will have a blue bar down the outside edge of the page information box (in list view)



OR

a blue dot beneath the page (thumbnail view).



SUBMIT

When all pages have been approved, the Submit button will be 'active.' The submission form will need to be filled out completely before officially submitting your project.

LAST CHANCE CHECKLIST

- Pictavo will alert you if any portraits have been left unflowed.
- Watch for any warnings left unaddressed—make corrections now!
- Confirm order details like number of books and page quantity during submission.



COMMUNITY SET UP

Pictavo Community is where parents, students and other community members can go to upload photos for consideration by the yearbook staff and purchase yearbooks, ads and other school products.

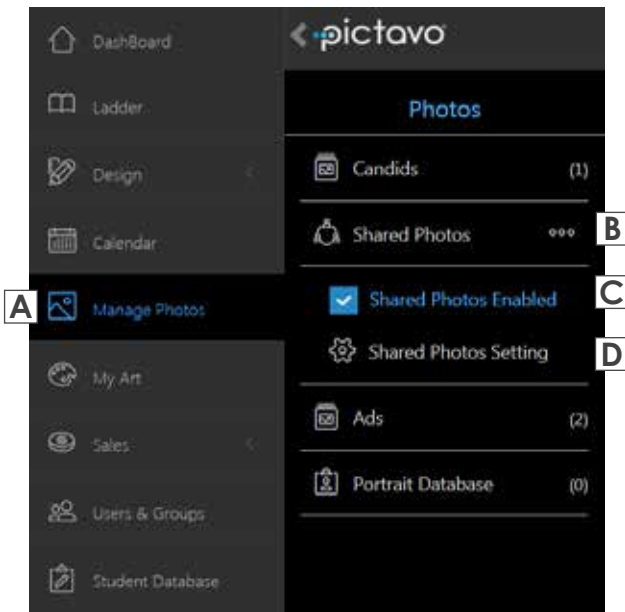
In order to use Pictavo Community, you will first want to enable it in the Sales > Store Setup area.



USE PICTAVO COMMUNITY TO EASILY GATHER PHOTOS FROM OTHERS!

By involving community members in the process of collecting photos, you will increase your coverage and sales.

After the Pictavo Community Sales button is enabled, click or tap on Manage Photos **A** in the left hand column, then the three dots **B** next to the Shared Photos album. Check the Shared Photos Enabled button **C** to allow community members to share their photos with you.



Once community members have uploaded photos, staff members authorized to view shared photos will find them in the Shared Photos album. From there, they can be moved into the desired albums in the Candid area for placement on a page!



If you want to limit the number of photos each user can submit or you would like your cutoff date for receiving them to be different than your book submission date, change the Shared Photos Setting. **D**



To create specific albums for community members to use when uploading photos, click or tap on Shared Photos **E** and then New Album to create any number of them. Album names can range from events (e.g. Homecoming, Prom, etc.) to sports (e.g. Football, Girls Track, etc.) to grades and/or homerooms.

ONCE YOUR PICTAVO COMMUNITY IS SET UP, DIRECT PARENTS AND STUDENTS TO COMMPE.PICTAVO.COM TO START UPLOADING PHOTOS AND/OR PURCHASING YEARBOOKS AND ADS.

COMMUNITY SELL

PICTAVO COMMUNITY IS ALSO GREAT FOR SELLING YOUR YEARBOOK, ADS AND OTHER PRODUCTS ONLINE!

If you want to sell products online, offline or both, Pictavo Community can help you easily account for every sale paid by credit card, check or cash.

In order to use Pictavo Community, you will first want to enable it in the Sales > Store Setup area.



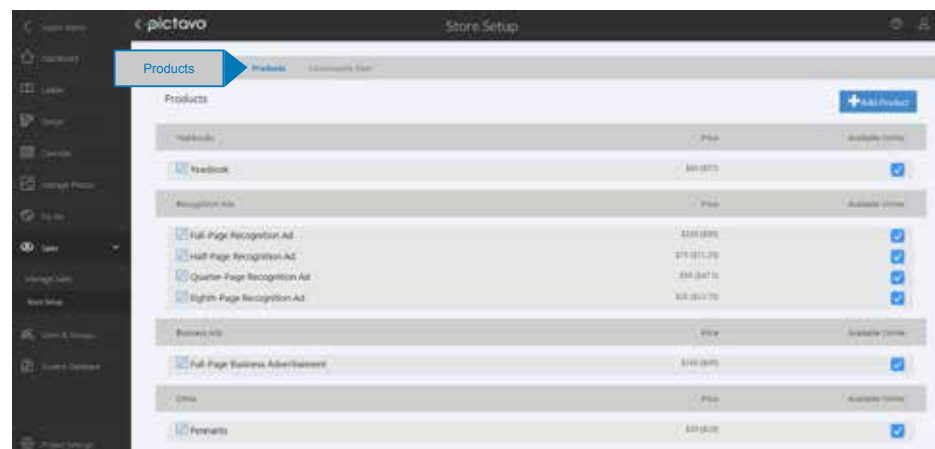
SCHOOL INFORMATION



In **STORE SETUP**, in the **SCHOOL INFORMATION** area you will:

- Indicate if you would like the required 5% service fee to be displayed to customers.
- Create a menu of Grade or Homeroom options that purchasers will use when choosing a student recipient of any product(s) they buy.
- Add the required sales tax rate, if applicable.
- Enter the address where the monthly reimbursement check will be sent for money collected through Pictavo Community.
- Create Custom Discount Codes (if applicable) to be used by qualified purchasers.

PRODUCTS



In the **PRODUCTS** area you will:

- Define the product(s) available for purchase. Options include yearbooks, recognition ads, business ads or other products you wish to offer.
- Include a custom product description, delivery message and thumbnail image if you want.
- Set a price for each product and set tiered prices to encourage early sales.
- Set a deadline for ordering.
- Set the maximum number of products available for purchase.

MANAGE

MANAGING SALES

Keep a constant pulse on sales by glancing at the Sales area on the Dashboard.



FOR MORE DETAILED SALES REPORTING, GO TO THE MANAGE SALES AREA

Manage Sales Summary:

- Pictavo Academy:** 3 Books, 2 No, 0 Other, 5 The Rest, 1 Total, \$153.9 Total Sales.
- Total Orders:** 5

Product Offered	Number of Products Ordered				Sales			
	Credit Card	Cash	Check	Total Orders	Credit Card	Cash	Check	Total Sales
Yearbook	3	0	0	3	\$54.00	\$0.00	\$0.00	\$54.00
Full-Page Recognition Ad	1	0	0	1	\$95.00	\$0.00	\$0.00	\$95.00
Half-Page Recognition Ad	1	0	0	1	\$0.00	\$0.00	\$0.00	\$0.00
Total	5	0	0	5	\$153.90	\$0.00	\$0.00	\$153.90

Purchaser Email	Purchaser Name	Order Date	Amount Paid	Tax	Amount Received	Order Number	Payment Method	Discount Code
lindam@pictavo.com	Jody Reppert	8/11/2021	\$	\$	\$	001	Credit Card	None
lindam@pictavo.com	Jody Reppert	8/11/2021	\$	\$	\$	001	Credit Card	None

VIEWING ORDERS

- Easily review all data collected from each order.
- Filter data to see only the information you're interested in.
- See the amount of tax collected, if applicable, so you can submit it as required by law.
- Mark whether each purchaser has received their product(s).
- Export data into Microsoft Excel for even greater report customization.

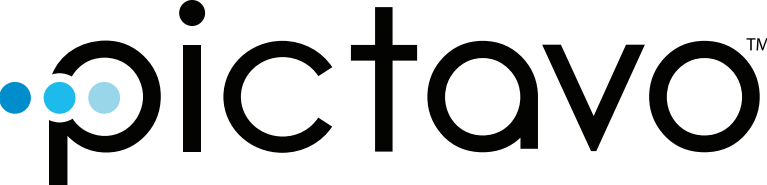
ADDING ORDERS

- Add offline (cash or check) orders to conveniently track all sales in one place.
- Make a note of any individual circumstances related to a particular order (e.g. special delivery instructions).

**CONTACT PICTAVO TECHNICAL
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