

# DirectoryPro

by pixami\*



The Hassle-Free Way to Create a Beautiful Membership Directory for Your Organization!

## Pixami Directory Pro QuickStart Guide

---

# Contents

---

Welcome	3
Let's Get Started!	4
Login to the Software	5
The Directory Page: Setting Up Your Book	6
Using the Planning Ladder	7
The Photos Page: Working With Portrait Photos	8
The Photos Page: Working With Candid Photos	9
The Users Page: Adding Users	10
The Editing Page: Designing Your Directory	11
The Editing Page: Flowing Your Portrait Pages	14
The Editing Page: Adding a Membership Roster	16
Submitting Your Finished Directory!	18

## Welcome

---

Thank you for choosing Pixami Directory Pro!

Directory Pro is an easy-to-use online application designed specifically for the creation of custom-printed, high-quality Membership Directories and Annuals for Churches, Country Clubs, Military, Police and Fire Departments, Dance Schools, Sports Teams, Clubs, Organizations, and more! Brought to you by Pixami, a leading provider of online publishing applications for Consumer Photo Books, and School Yearbooks, since 1999!

This QuickStart Guide describes the basic process for creating your directory, with an overview of the major steps and software features. This is a great place to get familiar with the software!

For more detailed information please consult the *Directory Pro User Guide*.

## Contacting Us

If you have any questions or need further assistance, please contact a Pixami Sales or Support representative:



**Submit a Ticket**

<http://support.pixami.com>



**Send an Email**

[support@pixami.com](mailto:support@pixami.com)



**Give Us a Call**

833.4YB.HELP (492.4357)



## Let's Get Started!

### The Basic Process

Designing your Directory with Directory Pro is fun and easy! Here's an overview of the major steps you'll follow:

- 01** First, you'll plan and organize your Directory into sections using the Planning Ladder feature of the software.
- 02** Next, you'll upload and organize the Photos and User Information that will be included in your Directory.
- 03** Then comes the fun part – designing your Directory pages! You'll combine templates, photos, text, and other elements into your designs.
- 04** Finally, you'll review and approve all of the pages in your Directory, and submit it for print!

### Software and System Requirements

Directory Pro runs in a web browser and is compatible with all of the major platforms! Please be sure to use a supported computer/device and browser. Directory Pro will run reliably with the following combinations:

Operating System	Device	Browser
<b>Apple Macintosh</b>	Laptop computers	Apple Safari
	Desktop computers	Mozilla Firefox Google Chrome
<b>Windows</b>	Laptop computers	Mozilla Firefox
	Desktop computers	Google Chrome
		Microsoft Edge
<b>Apple iOS</b>	iPad tablet	Safari
<b>Android OS</b>	Tablet Computers	Google Chrome
<b>Chrome OS</b>	Chromebook	Google Chrome



## Login to the Software

---



From your web browser, login to the software using the website address and account information you were provided.

*Don't have an account? Contact your Directory provider or Pixami Support.*

*Lost your Password? Click Forgot Password and follow the instructions.*



Once you log in you will see buttons at the top of the page that provide access to each of the main pages in the software.

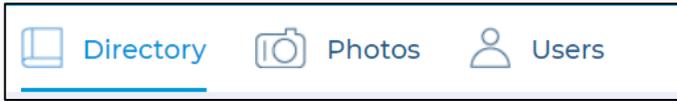
Click **Help** at the top of each page for detailed text instructions.

A red dot on the Help icon indicates that you have a new message or alert from the software.

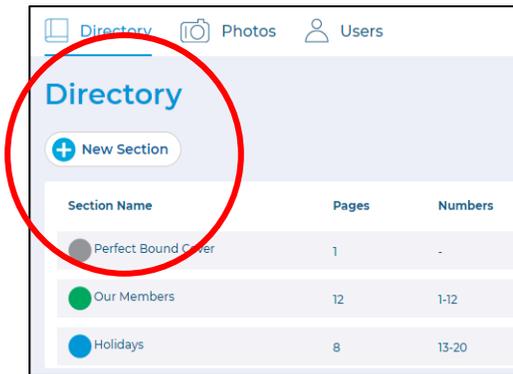
Click **Video Help** to watch an online video tutorial.



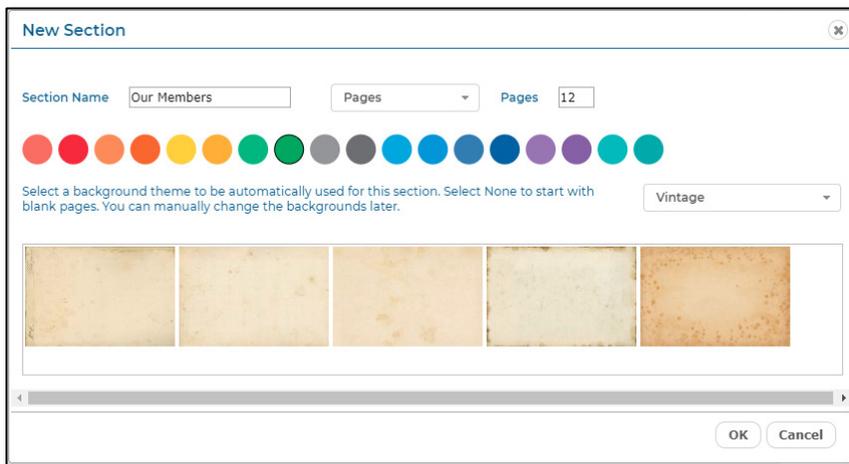
## The Directory Page: Setting Up Your Book



On the Directory Page you'll use a *Planning Ladder* to organize your book into sections according to your desired structure. Click the *Directory* icon at the top of the page to get started.



Click *New Section* to create each new section for your Directory. The New Section dialog will appear.



Type in the desired number of pages, then choose a Page Background, or add them later.

Repeat for each section you'd like to add.

Your new sections will be added to the Ladder.

## Using the Planning Ladder

Section Name	Pages	Numbers	Status	Actions
Perfect Bound Cover	1	-	In Progress	     
Our Members	12	1-12	Checked out	    
Holidays	8	13-20	Complete	     
Index	6	21-26	In Progress	     

The Planning Ladder contains features for organizing and designing your pages.

You can drag-and-drop sections to rearrange the book.



The Actions Toolbar provides access to all major functionality. Hold your mouse over an icon to see its function.

Click the **Info** icon to view more detail about a section.

Click the **Preview** icon to view the book.

Click the **Settings** icon to rearrange merge, split or delete sections.

Click the **Edit** icon to checkout the section for editing.

Click the **PDF Proof** icon to generate a PDF for initial proofing.

Click the **Mark Complete** icon to lock the section and prevent further editing.

Click the **Reject** icon to unlock a section.

Click the **Approve** icon to approve and lock a finished section.

**The Status Column shows the current Status of a Section.**

*In Progress* means the section can be checked out for Editing.

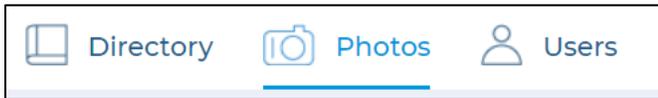
*Checked Out* means someone is currently working on the section.

*Complete* means the section is locked and waiting for review.

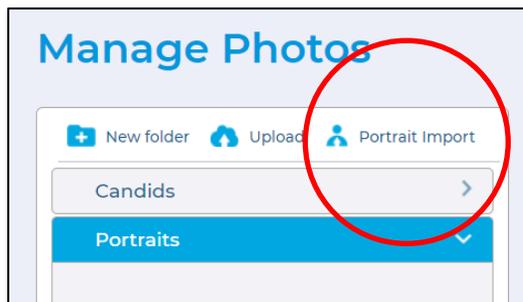
*Reviewed* means the section has been reviewed and approved.

Status
In Progress
Checked out
Complete
Reviewed

## The Photos Page: Working With Portrait Photos



On the Photos Page you'll upload and organize your Portrait and Candid photos for inclusion in your book. Click the **Photos** icon at the top of the page to get started.

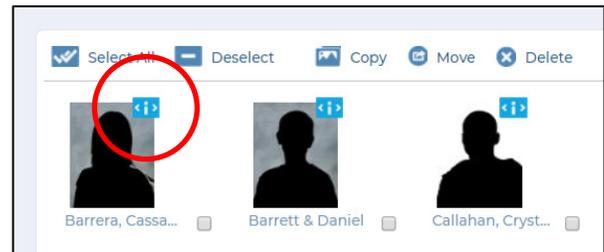


Portraits should be organized into a folder on your computer, along with a CSV or TXT *Index file* that contains organized member information (name, address, phone, email address, etc.).

Click on the **Portraits** Tab, then click **Portrait Import**, and follow the instructions to load your *Index file* and import your portraits.

Once your Portraits have been uploaded, they will appear as thumbnails on the page. Click the **Info** icon on any portrait to preview the portraits in a slideshow format, and to edit the member's information.

Members without portraits will be placed in a folder named 'No Photo.' When you click the **Info** icon for a you can upload a photo for that member any time.



Check the box below a portrait thumbnail to select it, then use the tools in the Photo



**Toolbar to organize and edit your portraits.**

Click *Select All* to select all of the photos in a folder.

Click *Deselect* to deselect the selected photos.

Click *Copy* to copy the selected photos to another folder.

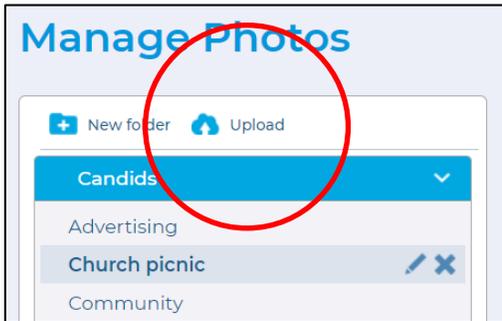
Click *Move* to move the selected photos to another folder.

Click *Delete* to delete the selected photos.

Click *Edit* to open the photo in the Photo Editor.

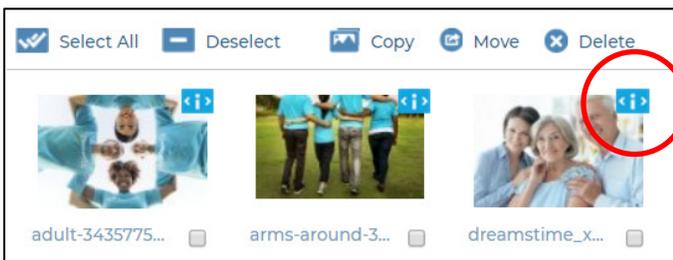
Click *Edit Metadata* to add or modify any of the original data from the *Index file*.

## The Photos Page: Working With Candid Photos



Candid photos are uploaded directly from your PC into folders in the software, for placement in your book. To upload your photos, click on the **Candid** Tab, select a folder, click **Upload**, then follow the instructions.

*The software will automatically create a folder for each section of the book. You can click **New Folder** to create additional folders.*



Once your photos have been uploaded, they will appear as thumbnails on the page.

Click the *Info* icon on any photo to preview the photos in a slideshow.



**Check the box below a photo thumbnail to select it, then use the tools in the Photo Toolbar to organize and edit your photos.**

Click *Select All* to select all of the photos in a folder.

Click *Deselect* to deselect the selected photos.

Click *Copy* to copy the selected photos to another folder.

Click *Move* to move the selected photos to another folder.

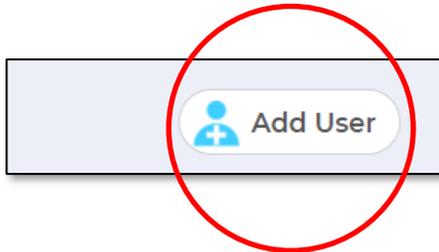
Click *Delete* to delete the selected photos.

Click *Edit* to open the photo in the Photo Editor.

## The Users Page: Adding Users



On the Users Page you'll add users to the software and configure their permissions. Click the *Users* icon at the top of the page to get started.



To add a new user, click *Add User* at the top right of the page. The Add User dialog will appear.

The 'Add User' dialog box contains the following fields and options:

- Login ID:
- First Name:
- Last Name:
- Password:
- Password (confirm):
- User Role:  (dropdown menu)

Below the fields, there is explanatory text: "User: edit all sections and manage the book" and "Administrator: all of the above, plus approve and submit final book". At the bottom right, there are 'OK' and 'Cancel' buttons.

Type a Login ID, First and Last Names, and Password for the user. The Login ID can be an e-mail address if you'd like.

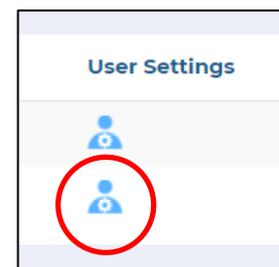
Next, choose a User Role from the menu. Choose *Administrator* only for the person(s) responsible for approving and submitting the finished book. Choose *User* for all other users.

Click *OK* to finish adding the user.

Be sure to send the new user with their login information, and a link to the Login page.

Click the *User Settings* icon to change the settings for any user, and to view their login history and a log of their activity.

To delete a user, select *None (Delete User)* from the User Role menu, then click *OK*.



# The Editing Page: Designing Your Directory

You'll use the features on the Editing page to design the pages of your directory.

Section Name	Pages	Numbers	Status	Actions
Hard Cover	1	-	Reviewed	    
Portraits	14	4-17	In Progress	    

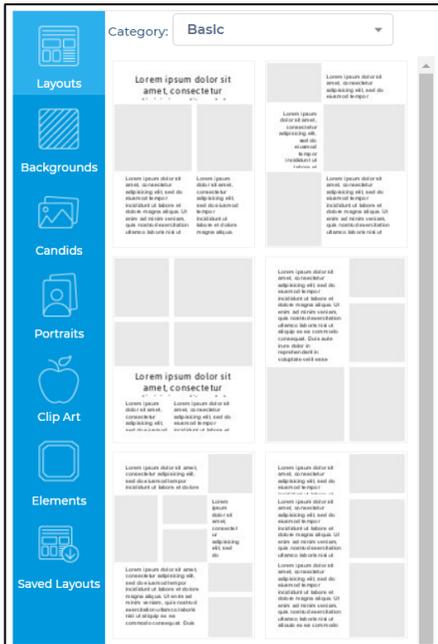
The Editing page is accessed from the Directory Planning Ladder, on the Directory Page. Click the *Edit* icon to check out a section for Editing. The *Editing Page* will open.

Note that you can only edit sections that have a Status of *In Progress*. To edit a section with a Status of *Approved* or *Reviewed*, you must first click the *Reject* button.

## Overview of the Editing Page

The screenshot shows the editing interface with several callouts:

- Main toolbar:** Located at the top of the editing area, containing various design tools like text, image, and background options.
- Page Exit buttons:** Located at the top right, including 'Cancel and Exit' and 'Save and Exit' buttons.
- Editing toolbar:** Located above the live page preview, containing tools for text, image, and background manipulation.
- Live page preview:** The central area showing a real-time view of the directory page being edited, titled 'Fun & Fellowship'.
- Design Elements Tab bar:** Located on the left side, listing categories like Layouts, Backgrounds, Candids, Portraits, Clip Art, Elements, and Saved Layouts.
- Thumbnail previews and navigation:** Located at the bottom, showing a row of small thumbnails for navigating between different page designs.



The Tab bar on the left contains *Design Elements* that you will use to design your pages. To get started, Click a tab to make it active. Browse through the Category menus to view the available options. Then Drag-and-Drop the desired elements onto the page.

*Layouts* are page designs that contain empty image and text frames in a variety of categories and styles.

*Backgrounds* are page background designs in a variety of categories and styles.

*Candids* are your candid photos that were uploaded on the Photos page.

*Portraits* are your portrait photos that were uploaded on the Photos page.

*Clip Art* are graphics organized in a variety of categories.

*Elements* are design embellishments organized in a variety of categories.



The *Image Editing toolbar* appears when you select an image frame.

Click the *Crop tool* to crop the selected photo.

Click the *Borders tool* to apply a border to the photo.

Click the *Rotate tool* to rotate the photo.

Click the *Effects tool* to apply image filters and effects to the photo.

Click the *Delete tool* to delete the image.

Click the *Arrow icon* to access advanced layout options.



The *Text Editing toolbar* appears when you select a text frame.

Click the *Text Edit tool* to enter text and select the font and style.

Click the *Borders tool* to apply a border and color to the text frame.

Click the *Rotate tool* to rotate the text.

Click the *Delete tool* to delete the text.

Click on the *Arrow icon* to access advanced layout options.

The *Main Toolbar* at the top of the page provides access to several useful features.



Click the *Undo* tool to reverse the previous action. You can undo up to 5 previous actions in a row.

Click the *Redo* icon to reapply an action that has been reversed. You can redo up to 5 actions in a row.

Click the *Add Image Frame* tool to add a new image frame to the page.

Click the *Add Text Frame* icon to add a new text frame to the page.

Click the *Previous Page* and *Next Page* icons to move through the section.

Click the *Save Layout* icon to save the current layout as a new layout. Your saved layouts will be available on the Saved Layouts tab.

Click the *Enlarge Layout* icon to enlarge or reduce the preview area to the optimum size for your screen.

Click the *Adjust Background* icon to clear the page background, or adjust the lightness.

Click the *Preview* icon to see an animated on-screen preview of your book.

### Steps for Designing Your Directory:

1. Choose and add Layouts to your pages
2. Choose and add Backgrounds to your pages
3. Add Candid Photos to the photo frames
4. Add Text to the text frames
5. Add Clip Art and Elements
6. Create your Portrait Pages
7. Create your Roster pages

Changes are saved automatically as you design your pages. Clicking *Cancel and Exit* allows you to leave the Design page and discard your changes.



Clicking *Save and Exit* allows you to leave the Design page and save all of your changes to your book.

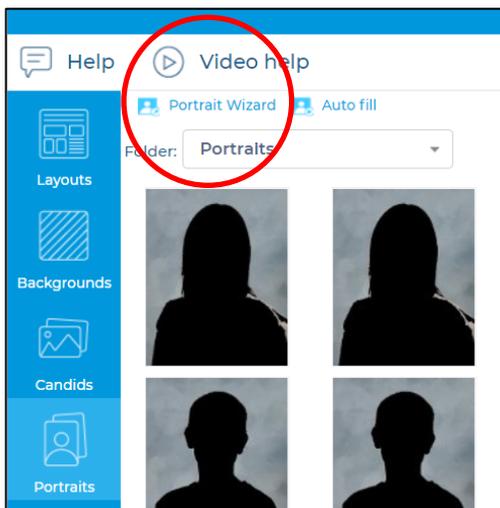
## The Editing Page: Flowing Your Portrait Pages

The Portrait Wizard provides automated functionality for flowing in your portraits along with the desired information for each member.

Before you start designing your Portrait pages, you should have a *Portraits* section on your planning ladder on the Directory page.

Section Name	Pages	Numbers	Status	Actions
Hard Cover	1	-	Reviewed	    
Portraits	14	4-17	In Progress	    

Click the *Edit* icon to open the Portraits section in the Editor.



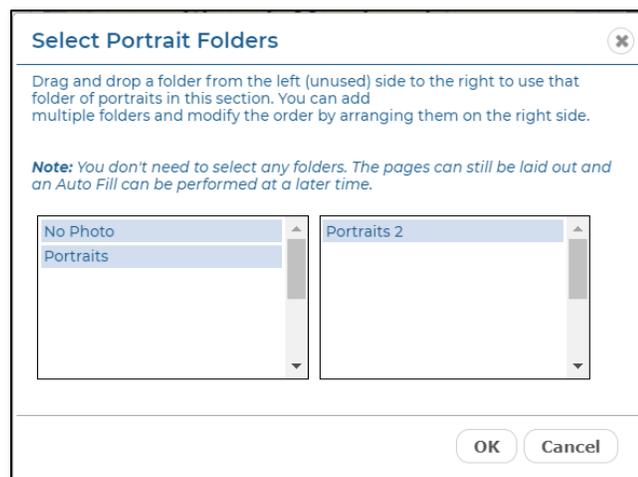
Next, in the Editor click the *Portraits* tab, then click *Portrait Wizard*.

The *Select Portrait Folders* dialog will open.

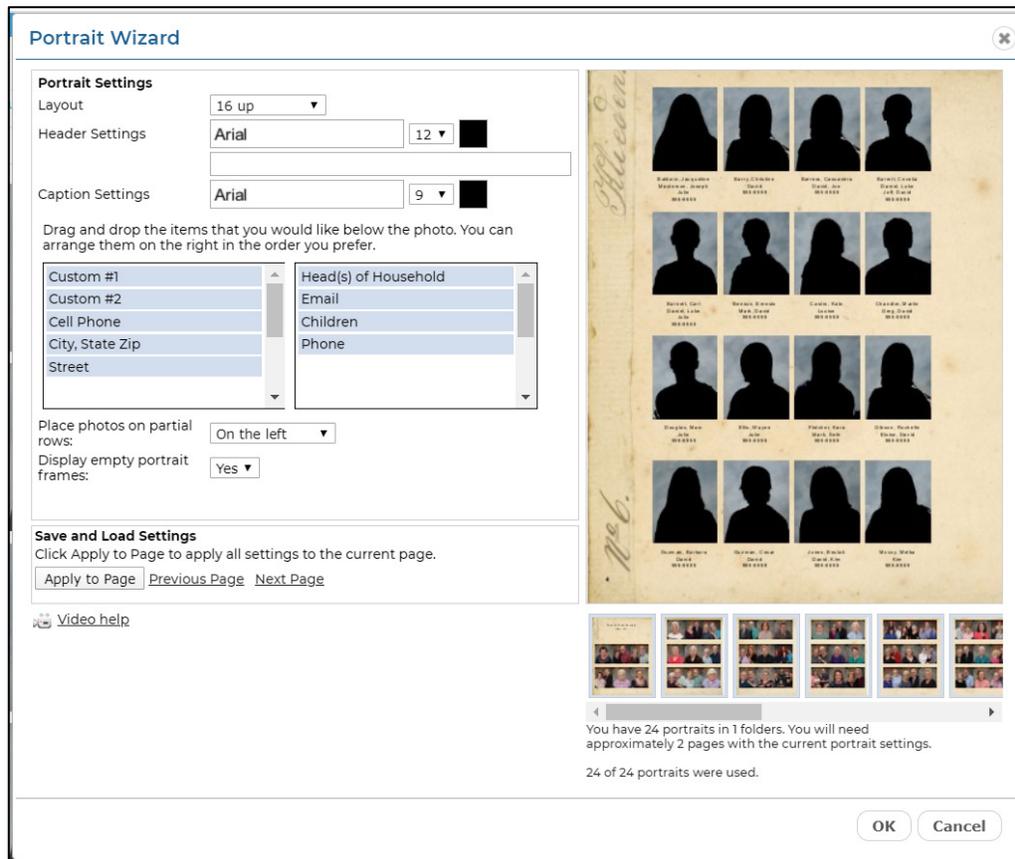
Drag and Drop the Portrait Folders you would like to use from the left column to the right column.

Then click OK.

The *Portrait Wizard* dialog will open.



In the *Portrait Wizard* dialog, you will adjust the settings to create your portrait pages.



The right side of the page shows the page you are currently working on. First, click *Previous Page* and *Next Page* to navigate to the page you'd like to work on.

Select from the *Layout* menu to choose the number of portraits you'd like on each page.

Type in a Header and choose the Font and Size under the *Header Settings*.

Change the Font and Size for Names/Captions under *Caption Settings*.

Click *Previous Page* and *Next Page* to move through the section and apply the portraits to each page. (Note that you can skip a page if desired).

Drag and Drop the index information that you would like to appear below each portrait, from the left column to the right column.

Click *Apply to Page* to apply your changes to the currently selected page.

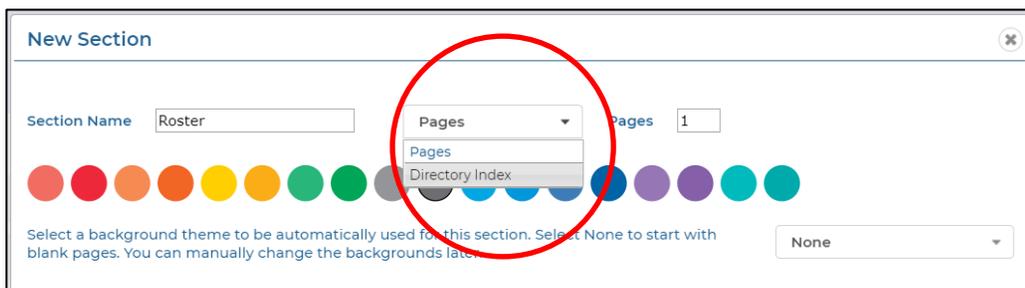
Click *OK* when finished. Your Portraits will be added to the page.

At any time in the future, you can relaunch the *Portrait Wizard* to make subsequent changes.

## The Editing Page: Adding a Membership Roster

Your Roster pages will contain an alphabetical listing of each member, along with their contact information.

Before you start designing your Roster, create a new *Roster* section on your planning ladder. On the Directory page, click *New Section*. Give your section a name, then select *Directory Index* in the Pages dropdown menu.



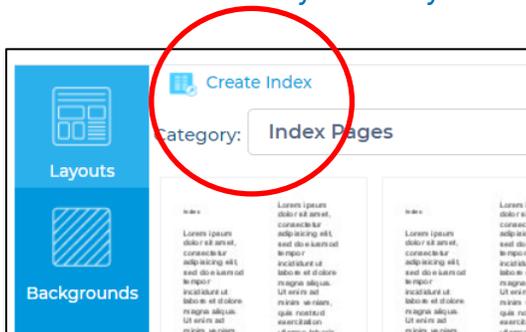
Make sure there are enough pages to fit your entire Roster. We recommend you start with the same number of pages as you used for your Portraits section. You can always delete pages later if needed.

Then click *OK*. You are now ready to create your Roster.

Click *the Edit icon* to open your new section in the Editor.

Next, in the Editor click the *Layouts* tab, and choose the *Category* called *Index Pages*. Layouts are available in 1-, 2-, 3, and 4-column formats, with and without photos. Drag and drop your desired layouts onto each page in the section.

You are now ready to flow your Index information into your pages.



Click *the Layouts tab*, then click *Index Wizard*.

*The Index Wizard* will open.

**Index Wizard** ✕

To use the Index Wizard, first set up the pages of this section by drag/dropping the desired layouts from the Index Pages category. You can resize the frames as you see fit and add additional image and text elements. Then, specify the fields that you want displayed in the index by dragging them from the left group to the right. You can change the order by dragging them from the left group to the right. You can change the order by specifying the font by going into each of the index column frames and changing it. The font size and presence of first letter headers can be controlled by the wizard below.

Custom #1	Head(s) of Household
Custom #2	Street
Children	City, State Zip
Phone	Cell Phone
	Email

Text point size  ▼

Add headers for the letters of the alphabet.

[Create / Update Index](#)

Click the link above to create or update the index. Remember to update the index before printing your book. It needs to be kept current manually.

In the Index Wizard, drag and drop the information you would like to appear for each member from the left column to the right column.

You can also select the *Text point size*, and check the box to *Add Headers for the letters of the alphabet* to your Index.

Click **Create/Update Index** to flow the selected information onto your Roster page(s).

You will receive a confirmation when complete, and your Roster will appear on the pages in the Editor.

Edit Section > Index > Pages: 30-42 ✕ Cancel and Exit



**Our Members**

<p><b>Aben, Abagail</b> PO Box 56 Grant, OR 97303 999-9999 NONE</p> <p><b>Alvarez, Aaron &amp; Abby</b> 827 Center Road Grant, OR 97303 999-9999 username@gmail.com</p> <p><b>Anderson, Zayne &amp; Adalyn</b> 80 North Center Road Grant, OR 97303 999-9999 username@gmail.com</p> <p><b>B</b></p> <p><b>Beley, Zaylen &amp; Addison</b> Marcus, Lauryn 724 Center Street Salem, OR 97302 999-9999 username@gmail.com</p> <p><b>Banks, A &amp; Alaida</b> 88 Center Way Salem, OR 97302 999-9999 username@gmail.com</p> <p><b>Barber, Alhan</b> 706 Center Road Salem, OR 97302 999-9999 NONE</p>	<p><b>Barnes, A &amp; Alia</b> "Mama's Place" 24 Center Street Salem, OR 97302 999-9999 username@gmail.com</p> <p><b>Bart, Rev. Zack &amp; Leah</b> 56 Center Drive Salem, OR 97302 999-9999 NONE</p> <p><b>Barrick, Cassandra</b> 141 Center Street #513 Salem, OR 97302 999-9999</p> <p><b>Barrett, Cecilia</b> 22 Center Lane Highland, OR 97301</p> <p><b>Bear, Zachary &amp; Abessona</b> 265 Center Lake Road Grant, OR 97303 999-9999 username@gmail.com</p> <p><b>Benton, Alana</b> 20 Center Ct. Apt. 49 Salem, OR 97302 999-9999 username@gmail.com</p> <p><b>Berry, Ian</b> See: Howell, Joselyn</p>	<p><b>Best, All</b> 14 Center Drive Grant, OR 97303 999-9999 NON</p> <p><b>Biddle, Xavier &amp; Allison</b> 273 Center Brook Rd. Salem, OR 97302 999-9999 username@gmail.com</p> <p><b>Bishop, Yoram &amp; Alcia</b> 4 Center West Street Salem, OR 97302 999-9999 NONE</p> <p><b>Blackburn, Xander &amp; Alivia</b> 193 Old Center Road Salem, OR 97302 999-9999 username@gmail.com</p> <p><b>Bolker, Amas</b> 20 Center Drive # 11 Highland, OR 97301 999-9999 username@gmail.com</p> <p><b>Bowman, Willie &amp; Annah</b> 26 Center Street Grant, OR 97303 999-9999 username@gmail.com</p>	<p><b>Bryant, Anabel</b> P O Box 362 Grant, OR 97303 999-9999 username@gmail.com</p> <p><b>Bulke, Will</b> 68 Center Street Salem, OR 97302 999-9999 NONE</p> <p><b>Byrd, Maribel</b> See: Lamb, Rodrigo</p> <p><b>Byrd, Wayne</b> Lawrence, Angelica "Lake, Audrianna" 270 Center Avenue Salem, OR 97302 999-9999 username@gmail.com</p> <p><b>C</b></p> <p><b>Callahan, Crystal</b> 2 Center West Avenue Highland, OR 97301 999-9999 username@gmail.com</p> <p><b>Campbell, Lewis &amp; Danielle</b> 516 Center Road Highland, OR 97301 999-9999</p> <p><b>Cannon, Diana</b> See: Sampson, Muhammad</p> <p><b>Cardenas, Daphne</b> 41 Center Street Salem, OR 97302</p> <p><b>Clark, Elena</b> 138 Center Street Salem, OR 97302</p> <p><b>CoEman, Leandro &amp; Elisa</b> 40 Center Avenue Salem, OR 97302 999-9999</p>	<p><b>Chen, Elizabeth</b> 26 Center Street Highland, OR 97301 999-9999 username@gmail.com</p> <p><b>Choi, Minah &amp; Alonah</b> "Tanya T. Alia &amp; S. Demarcus S. Crystal &amp; Eric" 377 Center Avenue Salem, OR 97302 999-9999 username@gmail.com</p> <p><b>Collins, Arabella &amp; Vance</b> "Alan, David" 26 Center Street Highland, OR 97301 999-9999 None</p> <p><b>Combs, Valentino &amp; Aidel</b> 115 Center Road Grant, OR 97303 999-9999 username@gmail.com</p> <p><b>Conrad, Emory</b> 7 St. Center Street Highland, OR 97301 999-9999</p> <p><b>Conrad, Layton &amp; Erica</b> "Laci, Taylor" 18 Center Ridge Road Grant, OR 97303 999-9999</p> <p><b>Conway, Evelyn &amp; Landon</b> 301 Center Hill Road Grant, OR 97303 999-9999</p> <p><b>Cooper, Kristopher &amp; Faith</b> 72 Center Court Salem, OR 97302 999-9999 username@gmail.com</p> <p><b>Covington, Francesca</b> 42 Center Drive Apt. 100 Salem, OR 97302 999-9999 username@gmail.com</p>
--	---	---	--	--

You can edit the Roster pages using all of the available editing tools, just as with the other pages of your directory.

To make changes to your Roster information, click **Create/Index** again, make the appropriate changes, then click **Create/Update Index**. Your Index will be updated with the new settings.

Pixami Directory Pro | QuickStart Guide

17

## Submitting Your Finished Directory!

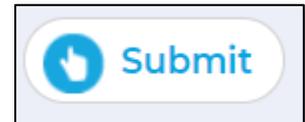
Once you've finished your design and carefully reviewed your pages for errors, you will be ready to submit your final directory for print!



On the Directory page, click the *Mark Complete* icon to mark each finished section complete. Then click the *Approve* button to approve each section.

Once you've completed a section it will no longer be available for editing.

Once all sections have been Approved, a Submit button will appear at the top of the Directory page. Click *Submit* to start the proofing and final submission process, then follow the on-screen instructions.



**Proof Acceptance**

 You have warnings and errors which have not been resolved in your book. The specific warnings and errors are:

- You have portrait photos which have not been used in the book. You can get more detail on the Activity tab.

Please make sure these are OK before accepting the proof.

**Terms**

As the customer, you are solely responsible for final approval of this proof and for certifying its adequacy and accuracy. We are not responsible in any manner for any asserted printing or design errors, where the printing or design conforms to the approved proof. You understand that, immediately upon approval, your project will enter our automated printing process, you will not be able to make additional changes and, if you request changes after this point, you will be billed for any printing and manufacturing processes which have been performed.

**Please make sure you have reviewed all of the following:**

- Correct fonts were used.
- All text is spaced properly.
- All text is formatted and aligned correctly.
- All wording/phrasing is typed correctly.
- All names are spelled correctly.
- There are no other spelling or punctuation errors
- All design elements (headers, clipart, backgrounds etc) are EXACTLY correct
- All students are included
- All classes are included
- Any/all 2-page spreads with a continuous image spanning both pages appear correctly
- All desired graphics and text elements have been included
- All elements of the electronic proof are accurate, correct and complete
- The cover page is the correct size for the number of pages in your book.

**By approving this proof for production, you affirm the following:**

- You understand and agree to all of the above.

I have reviewed the PDF proof and accept the above terms.

Previous Next

You will have the opportunity to review a final PDF for any errors. If you find any errors, go back and correct them, and then follow the steps to Submit again.

Once you've reviewed the PDF, the Proof Acceptance dialog will appear.

**Please carefully review the Terms before you submit your final book for print. When ready, check the box to confirm that you have reviewed the PDF and accept the terms of submission. Then click Next.**

**Your directory will now be submitted for print.**

Please contact Pixami, or your Directory Provider, if you have any questions about the submissions process and the delivery of your directory order.

**Congratulations! Thank you for using Directory Pro!**

## **NOTES**

---

## **NOTES**

---