

ROES EVENTS - How to build your spreadsheet in preparation for Events

Welcome to Color Inc Roes Events Tutorial.

Today we will be looking at how to setup your spreadsheet and data in preparation for using in ROES Events.

You will need to have a spreadsheet program capable of saving to a .csv file format and copying file paths such as Excel. At this time Apple Numbers no longer supports file path name association.

To begin create your spreadsheet and place field names in the top row for each type of data to be used. If the information was provided to you in spreadsheet format then you will only need to add the Image and Package columns to the spreadsheet. To utilize some of the features of ROES Events I am going to make the first three columns Image, Group Image and Package. After that the data for the subjects can be in your preference for order. The spreadsheet must contain at least Image and Package columns for use in ROES events. The package column uses the P-Q format in which P is for the Packages and Q is for the Quantity of the package ordered for the subject. If multiple packages are ordered separate them with a semicolon. For example if 1 of package A and 1 of Package B are ordered then enter A-1 semicolon B-1. Complete as much of the data as you have access to at this time.

If you have completed the photo job already then you can associate the image files in the spreadsheet and then when you import the data file the images will be able to populate the table in Events. If you have not captured the images yet then you can complete image file association at a later date.

If you are a windows user you will need a shortcut to add your filename in Excel.

Download and install the copy file names program from

<http://www.extrabit.com/copyfilenamespro/>

Browse to your image folder, select the images you need to copy. Right click and select copy file names. Return to the spreadsheet, right click in the first cell under the filenames column and select paste. Your file names should appear in the column now. Perform the same step for your group image file. Once the group image file name is in the first cell, hover over the bottom right corner of the cell until you see a plus sign. Click, hold and drag down the column to copy the group filename to the other cells in the column.

For Mac users with Excel you can copy and paste the images into the cells or highlight the image files and then copy and paste them into Excel.

Perform the same steps for your group photos and/or any logos you will be using. Copy and paste your group image to the first cell in your group image column. To copy the image to the rest of the column, CTRL-C the cell then highlight the rest of the cells below by clicking and dragging down the column highlighting all the cells you want to fill. Then CTRL-V to paste the image into the cells.

Your order will be packaged in the same sequence you see in your data file so your data should be sorted before you upload your file to Events. You can sort data file in your spreadsheet beforehand by using the sorting feature in Excel. For example if you want the job to print out in order of grade or teacher then use the sort feature in excel to re-organize your files.

First select your entire spreadsheet by clicking in the upper right corner. Click on the funnel icon in the top menu bar. This will add arrows to your column headers. Click the arrow in the column you want to sort and choose to sort ascending or descending. Your data and images will move together.

Another option is to Click on sort and filter in the upper right corner. Select custom sort from the drop down menu. A pop-up window will display with sorting options. Make sure the "my data has headers box" is checked. Select a sorting option from the column drop down, choose the highest level first then subsequent sorting options later by adding a level. Click add level if you would like to refine your sorting further. Click okay when complete and your data will be sorted.

In Excel to save your spreadsheet in .csv format. Select the windows menu then select "save as" In the save window, name this file and select .csv in the "save as type menu" at the bottom of the window. Click save then click yes on the pop-up window. There may be additional warning windows regarding saving as this type of file format. Select yes or approve as you review each confirmation window.

Now you are ready to import your data and images to start ordering. See the tutorial "How to import your data and images into ROES Events" for the next step and "Matching images and Identifying packages".