

ROES Records System Tutorial



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Records Tutorial

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Sample images provided by 'Reflections by June' –
special thanks to June Hallowell, Photographer

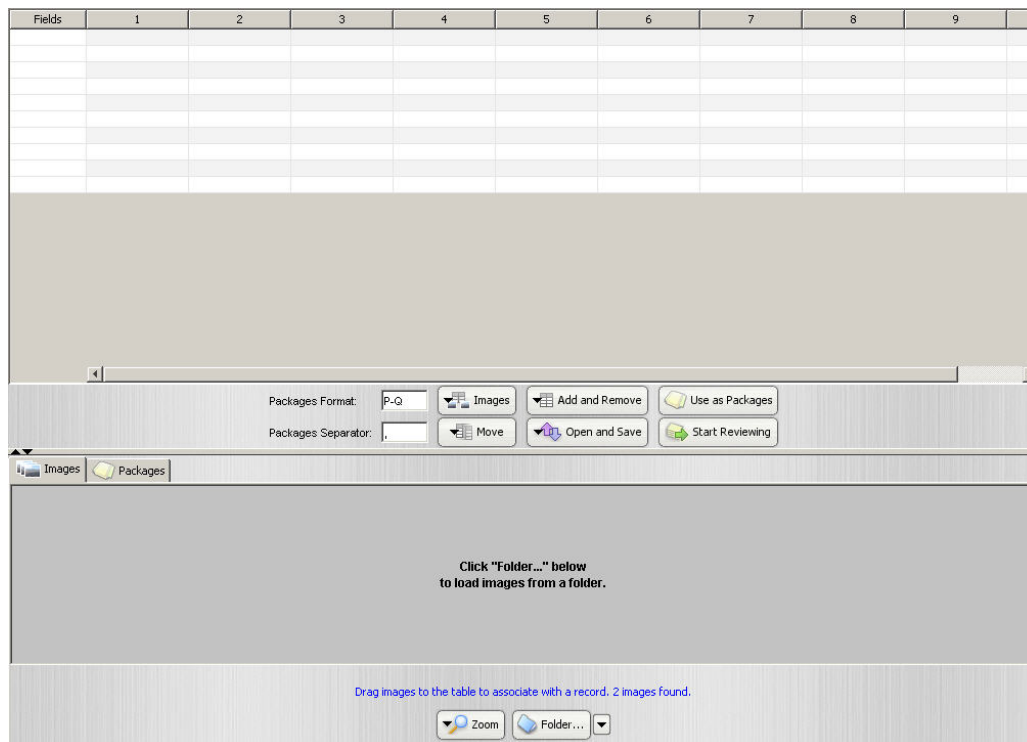
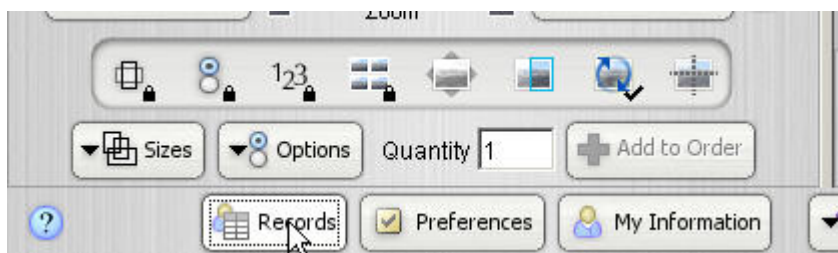
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ROES Records System

The ROES Records system works with a previously created spreadsheet containing information specific to images within the order. If you do not have an existing file from which to work, the Records program can be manually set up, making Records yet another valuable asset to all photographers using the ROES program.

Opening Records

To begin filling an order using *Records*, click on the **Records** button, below the Sizes button. The Records window will appear on the page containing several tools to help you set up your workspace. At the top you will see rows and columns, at the bottom images and packages. Buttons on the page will be described as they are used throughout the tutorial.

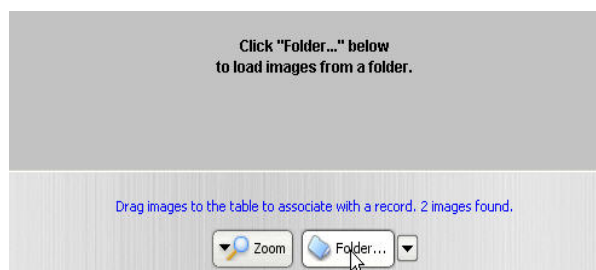
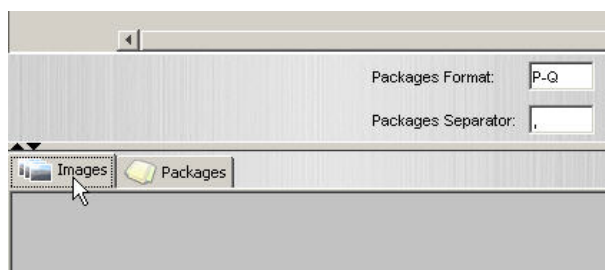


Each piece of information from your spreadsheet will have its own line, which will automatically fill when the existing file is merged into Records.

- File name
- First name
- Last name
- Package ordered
- Coach/Teacher, etc.
- League/School, etc.

Accessing Images

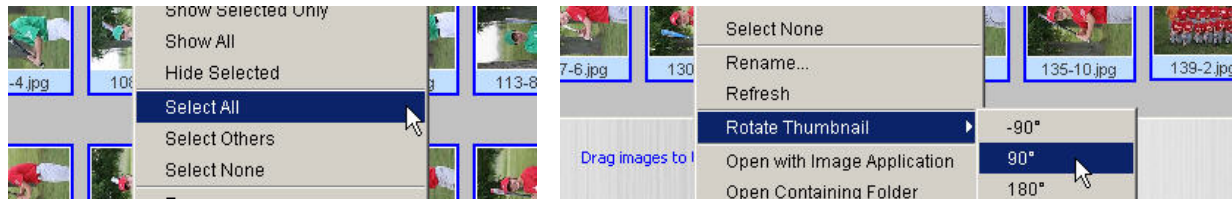
Opening the image folder in Records is no different than finding the images in the basic ROES program, except that you must first have the *Images* tab in the lower portion of the window selected. You can now click on the **Folder** button at the bottom of the window to search for the image folder needed.



Once opened, the image thumbnails will appear in the image window. As before, using the zoom button allows you to adjust the appearance of the thumbnails.



You can, if necessary, rotate the images. Right click in the background area and choose *Select All, Rotate Thumbnail*, then the degree needed to make the images all heads up.



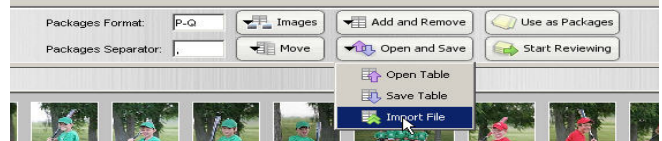
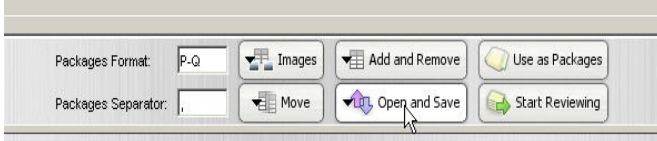
Groups can be adjusted by selected only them, and re-rotating.



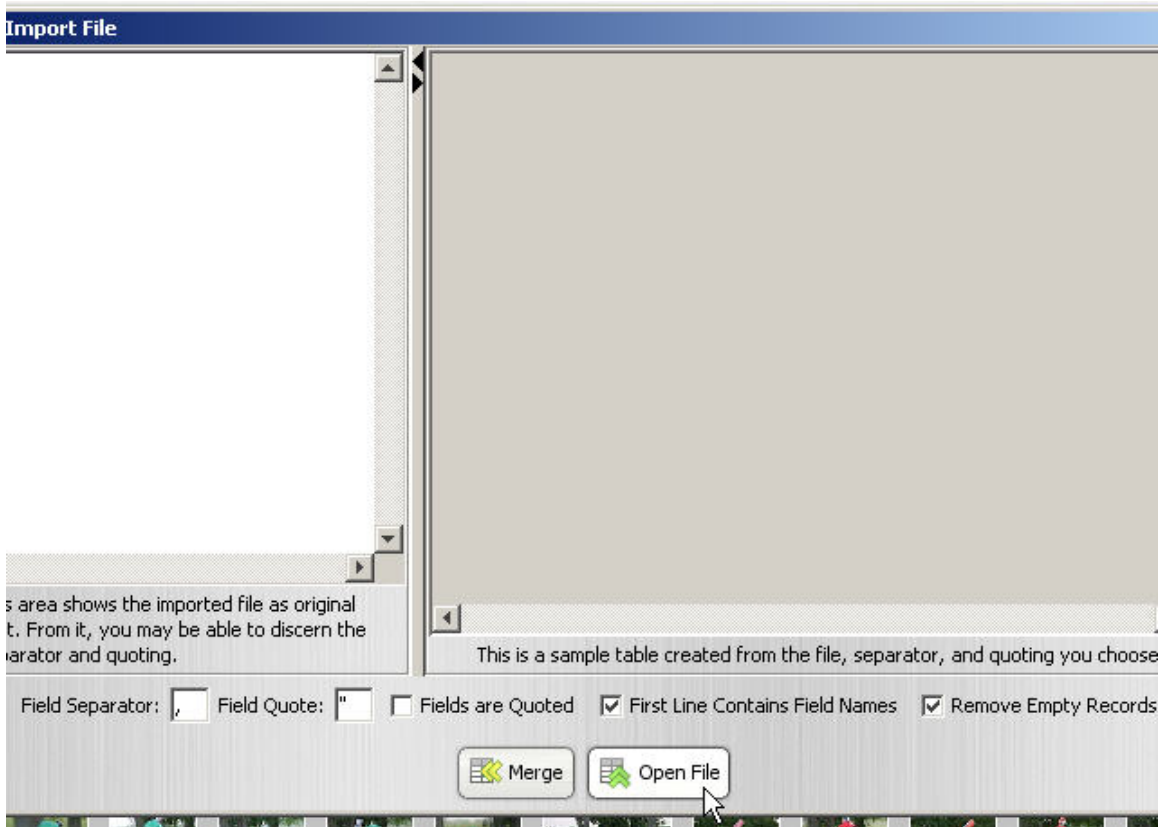
After all of the images have been adjusted as needed, you are ready to import the spreadsheet

Importing the File

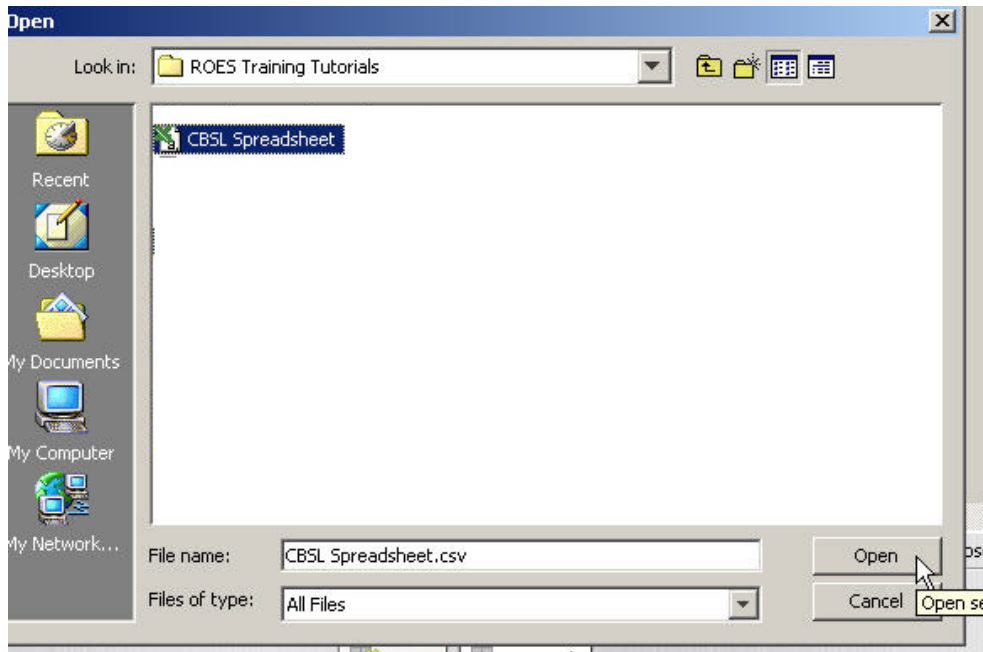
Click on the **Open & Save** button, then **Import File** from the drop box to import the existing file.



This will open a new dialog box from which you can search for the file needed whether it is on your desktop or the hard drive.

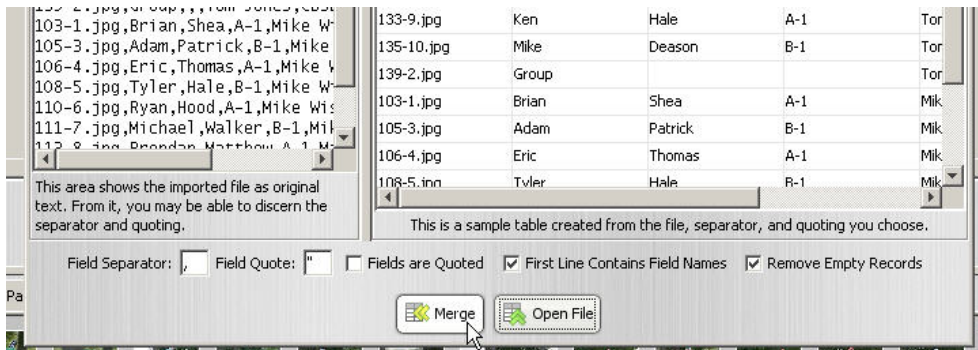


Click on the **Open File** button to begin your search.



Double click on the file needed or click once, then **Open**.

This now opens the Import File box, giving you the raw data on the left, and how it will be represented into ROES Records on the right. In the lower portion of this window, there are few tools to create the spreadsheet in a readable format, for example, *Remove Empty Records*.



Click on the **Merge** button at the bottom of the window to send the information to the Records table.



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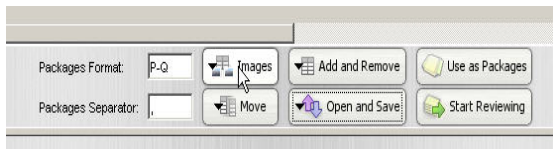
You will see that this automatically fills with the data. Once the information has been put in place, you are ready to begin matching the images to the records

Fields	1	2	3	4	5	6	7	8	
Filename	118-1.jpg	120-3.jpg	123-4.jpg	124-5.jpg	127-6.jpg	130-7.jpg	132-8.jpg	133-9.jpg	13
First Name	Don	Mike	Glen	David	Vince	Mike	Bob	Ken	
Last Name	Hood	Williams	Simpson	Geggus	Stark	Lach	Huffy	Hale	
Package	A-1	B-1	B-1	A-1	B-1	A-1	B-1	A-1	
Coach	Tom Jones	Tom Jones	Tom Jones	Tom Jones	Tom Jones	Tom Jones	Tom Jones	Tom Jones	Tc
League	CBSL	CBSL	CBSL	CBSL	CBSL	CBSL	CBSL	CBSL	

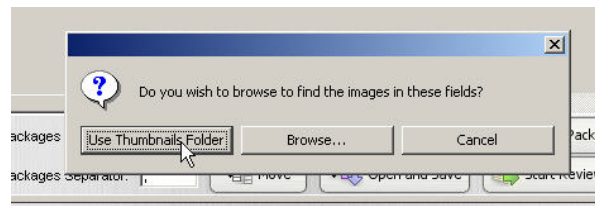
Preparing the File

To begin editing the table, first click on *Filename* to highlight the image row, click on the **Images** button, then *Match Images*.

Fields	1	2	3	4	5	6	7	8	9
Filename	118-1.jpg	120-3.jpg	123-4.jpg	124-5.jpg	127-6.jpg	130-7.jpg	132-8.jpg	133-9.jpg	134-0.jpg
First Name	Don	Mike	Glen	David	Vince	Mike	Bob	Ken	...
Last Name	Hood	Williams	Simpson	Geggus	Stark	Lach	Huffy	Hale	...



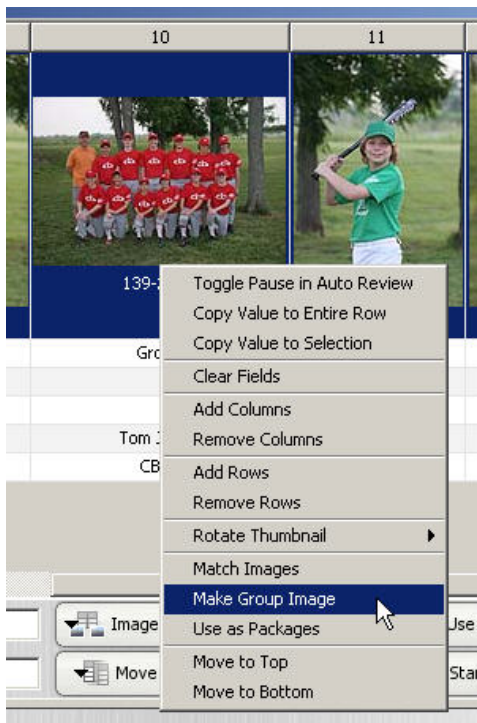
Now, select either **Use Thumbnails Folder** or **Browse** to search a location on your hard drive.



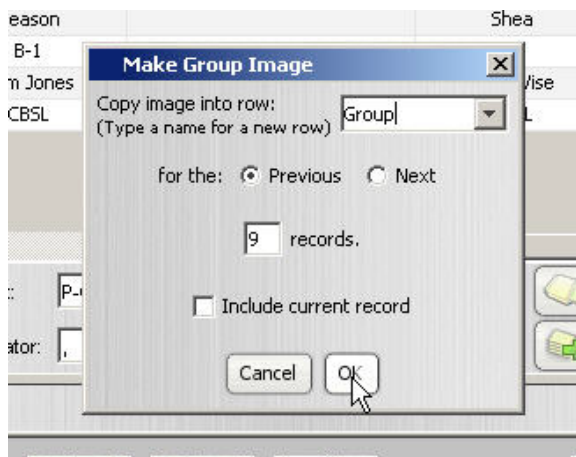
This takes all the images, including the groups, and puts them in a single row.

Fields	1	2	3	4	5	6	7	8
Filename	[Row of 8 baseball player images]							
First Name	Don	Mike	Glen	David	Vince	Mike	Bob	Ke











To move the groups to their own row, select and then right click on the first group image. This opens a new window that will let you move the group images into their own row.



Select *Make Group Image*. In the drop box, type in the name for the new row (Team Images, Group Images, etc.) Select the number of image records to which this group will apply, if they come before or after the group in consecutive order, and if that record should be included, then click OK.

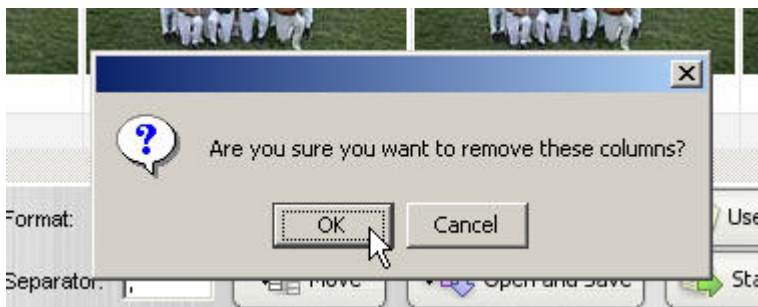
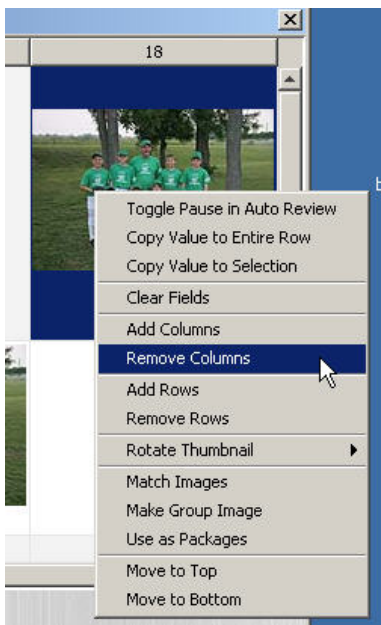


This automatically creates another row with the proper group image below each individual.

Fields	1	2	3	4	5
Filename	 103-1.jpg	 105-3.jpg	 106-4.jpg	 108-5.jpg	 110-6.jpg
Group	 116-2.jpg	 116-2.jpg	 116-2.jpg	 116-2.jpg	 116-2.jpg

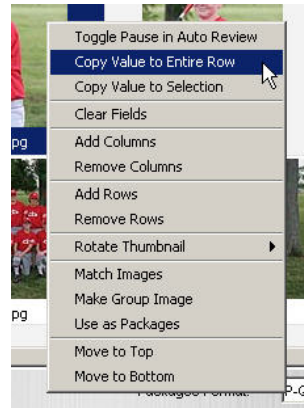
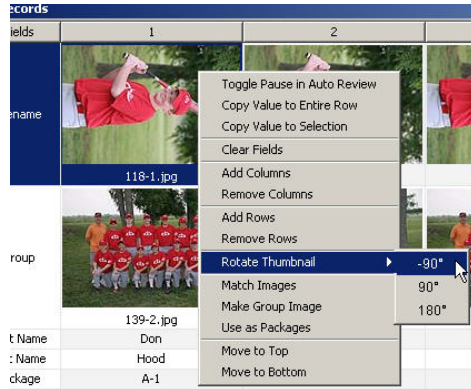
You can also do this by dragging and dropping the desired group image below the first individual in the new group. Then, copy and paste the image into the fields needed for that group. Repeat either process until all the groups are below the desired individuals.

Once your groups are in place in the designated row, they can be removed from the top row by selecting them all (using the Ctrl button on the keyboard), right clicking and selecting **Remove Columns**.

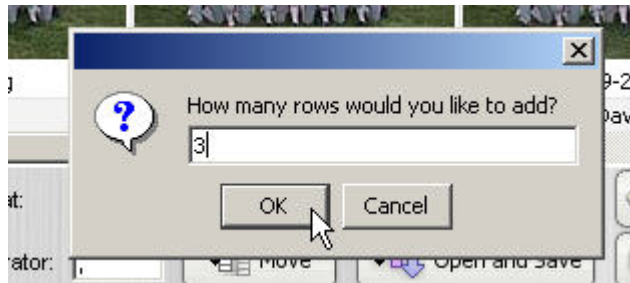
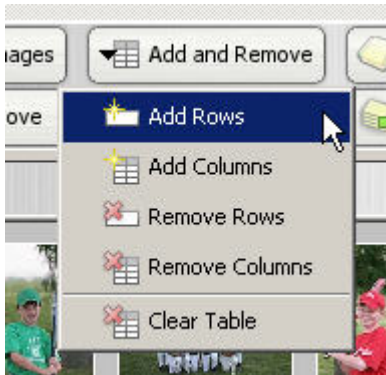


The program will ask you if you want to remove the columns before doing so. At this point, you are basically doing clean-up work – eliminating unnecessary items, associating all the images to the filenames.

If your images were not already in a heads-up position, you can rotate them by clicking on the first image, right clicking and selecting *Rotate*, then choose the degree of rotation.



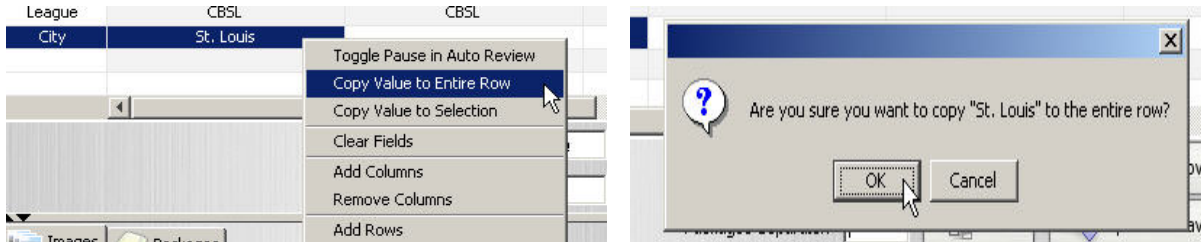
You can also add or remove rows and columns. To do so, click on the **Add & Remove** button and select *Add Rows* or *Add Columns*, or *Remove* if that is your desired purpose.



You will be asked how many you would like to add. Type in the number and click OK. Type in the title of the new row below the **Fields** heading, then the text that applies to that title in the first column

Coach	Tom Jones	Toi
League	CBSL	
City	St. Louis	

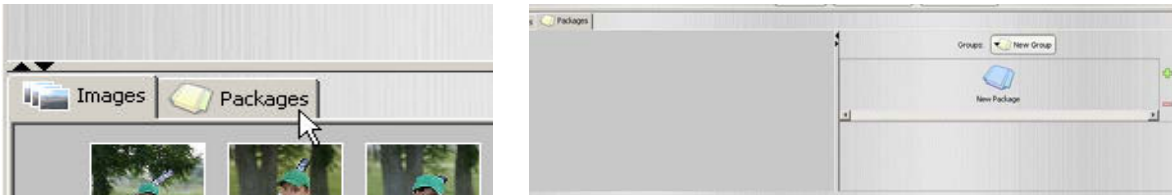
Copy and paste that information into the other columns to which it applies by right clicking and select appropriately, either the *Copy Value to Entire Row* or *to Selection*.



If you choose the Entire Row, the program will ask you if that is the choice you intended to make. Once you have completed the editing process, you are ready to begin the package process.

Creating Packages

Change the work area at the bottom by selecting the **Package** tab on the left.



To begin the package set up process, first you need to select the row that you have defined as the Package row by clicking in the Fields section.

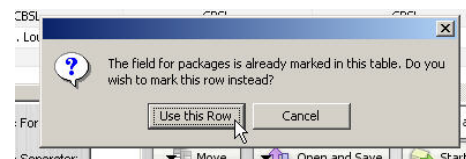
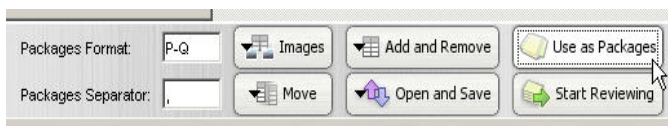
First Name	Don
Last Name	Hood
Package	A-1
Coach	Tom Jones
League	CBSL

The entire row will now be highlighted in red. This will not change until all of your packages have been created.

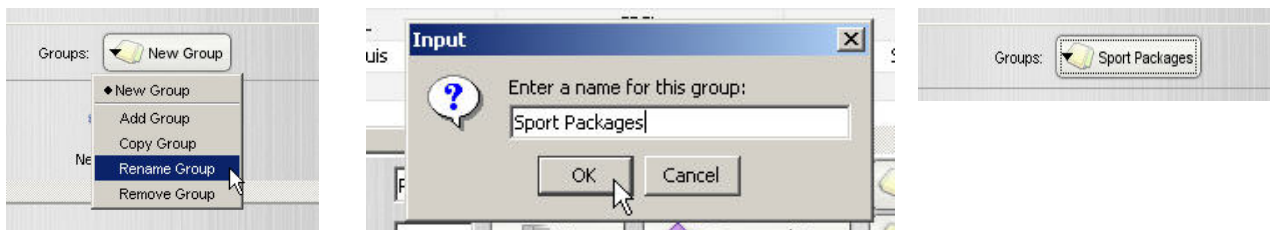
Last Name	Hood	Williams	Simpson
Packages	A-1	B-1	B-1
Coach	Tom Jones	Tom Jones	Tom Jones

Now, click on the **Use as Packages** button. A dialog box will pop up, making sure that this is indeed the row to use for packages. Click on the **Use this Row** button. This also allows you to

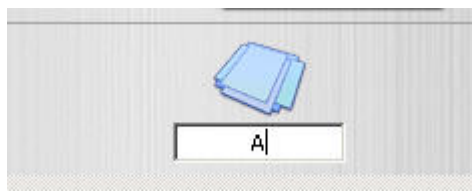
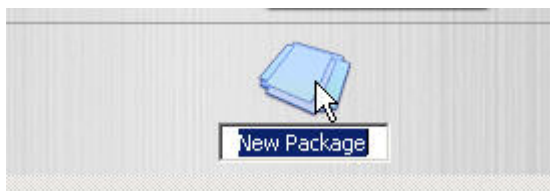
select a row not previously designated for packages. You are now ready to build your packages!



You will now need to designate a group name for this selection of packages. Click on the button next to Groups labeled **New Groups** and enter the new name for the group. If you have a predetermined set of packages for all proms, all sport events, etc., you will have to build the packages just once. Keep in mind, though, that if you include items specific to a certain sport, they will have to be edited when the sport changes!



Once you have your new group named, you can begin filling the packages.



Double-click on the package to enter your package identification. In this case, simply type in the name and click off the package. It must match the label given on the spreadsheet. You can create the folder for all the packages and name them now, or create and name them as they are filled



To build the packages, drag the first product needed from an existing ROES catalog to the empty folder. As in using the Packager Tool, wait for the green + to let go of the item. (You can use packages already built in the Packager and pages created in the Pager!)



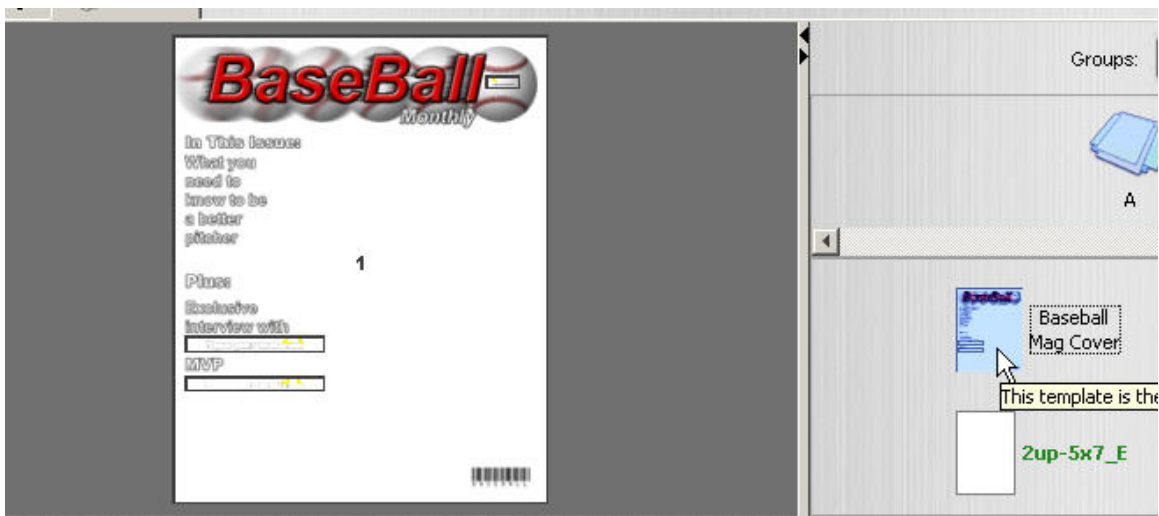
The building process works basically the same as setting up packages with the Package Tool. However, these packages CAN consist of multi-node images! Once the packages predefined have been created, the Packaged row will be highlighted in blue.

Last Name	Hood	Williams	Simpson	Geggus
Packages	A-1	B-1	B-1	A-1
Coach	Tom Jones	Tom Jones	Tom Jones	Tom Jones

Defining the Nodes

After the packages are built, you must designate what information goes into each product, as well as the nodes in each if you have selected multi-node products. To clarify this information, double click on the first package.

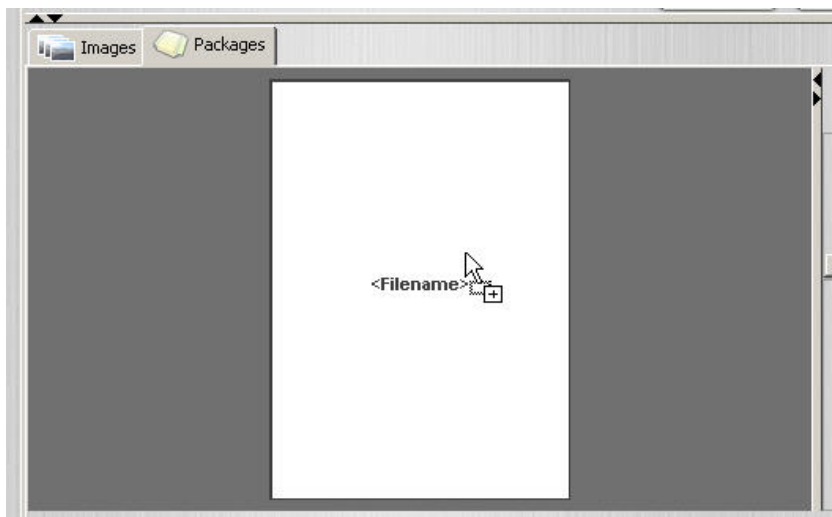
As in the Packager, the products in the package will appear below. Click once on each product within the package to bring it up in the workspace on the left.



You can now simply drag and drop the *Field* title from above into the proper node. Use the same process for identifying placement of text, individual name, team name, coach name, etc., in products that require such. (Text that is changeable can be edited in the review process)

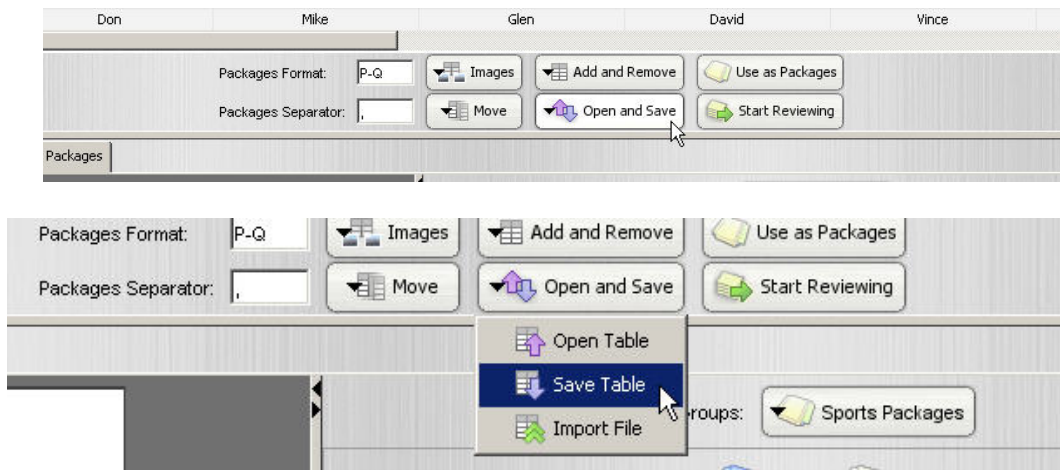


Packages created with single node images will still need to have the field information put into place. Once you have identified placement of images and text in all of the products used, you can now begin the review process.

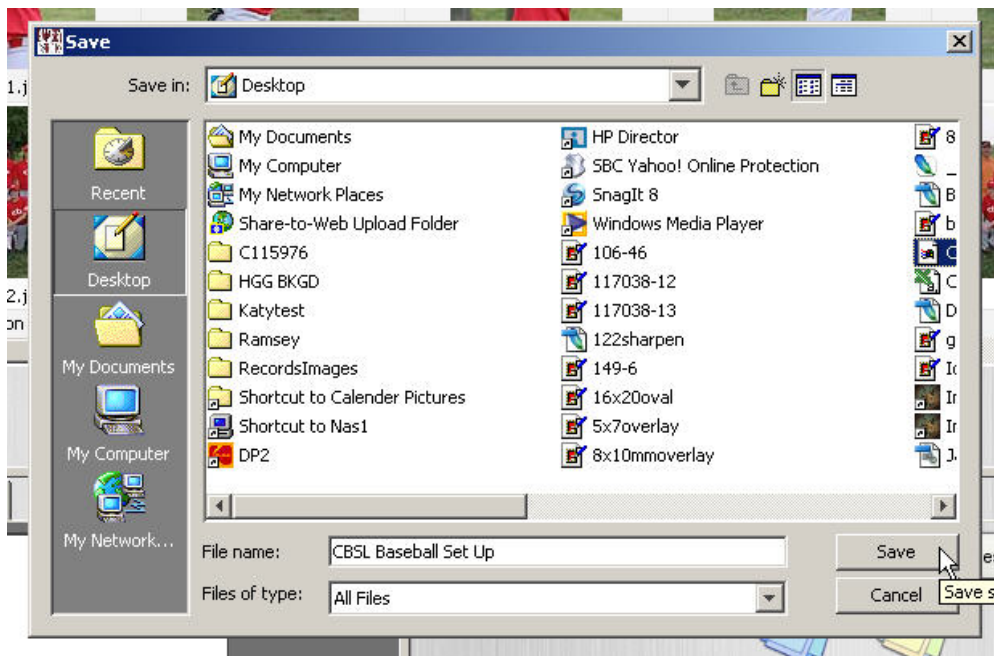


Saving the Table

You can, at this point, choose to save the current set-up in progress. Saving the table allows you to leave the ROES system and return at a later time to complete the process. All information put in place for this order can be saved and the reviewing and editing can be completed at a more convenient time. To take advantage of this feature, click on **the Open & Save** button and select *Save Table*.

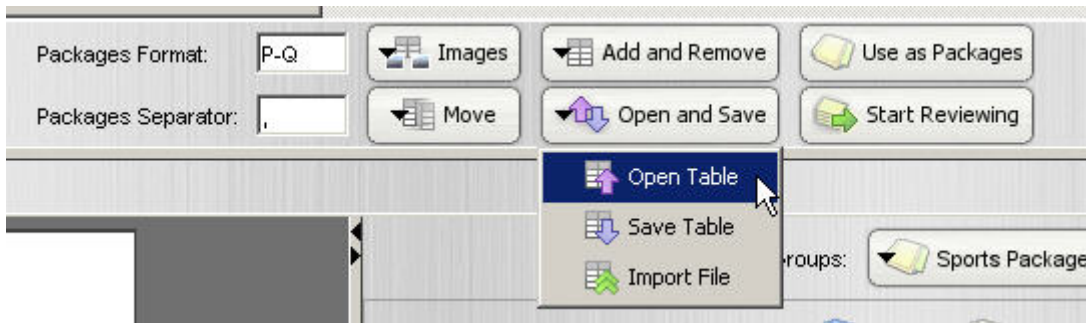
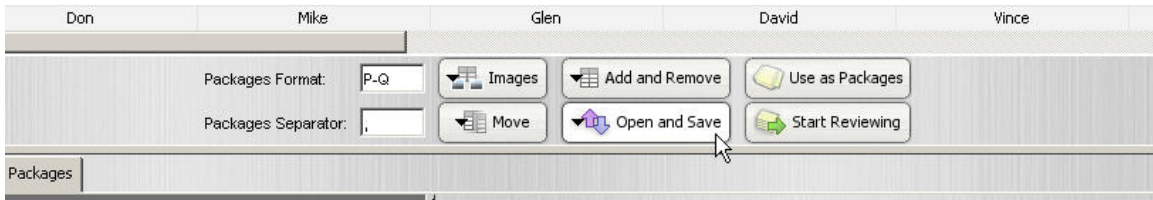


This will open the Save window, allowing you to name this table of information and choose where the information will be saved.

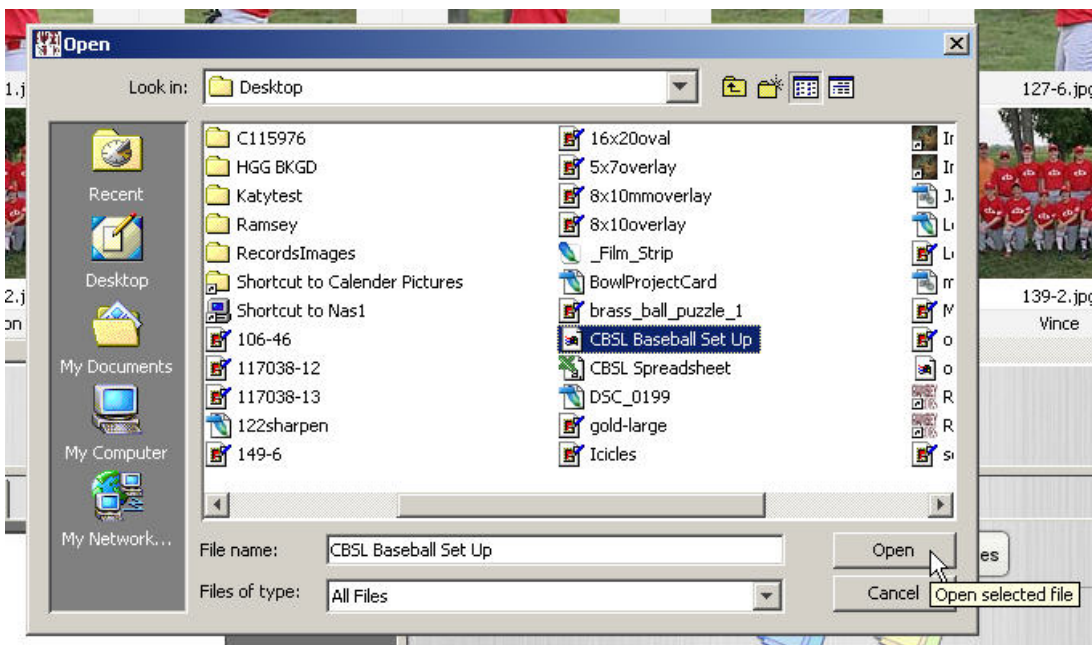


Type in the name you have selected and click on the Save button.

When you are ready to complete the order from this information, open the ROES program as usual and click on the **Records** button to access Records. Click on the **Open & Save** button and select *Open Table*.



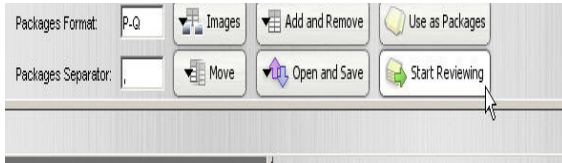
This will now open the Open window, allowing you to open the information desired and continue the reviewing, editing and sending process.



Select the file needed and click on the Open button.

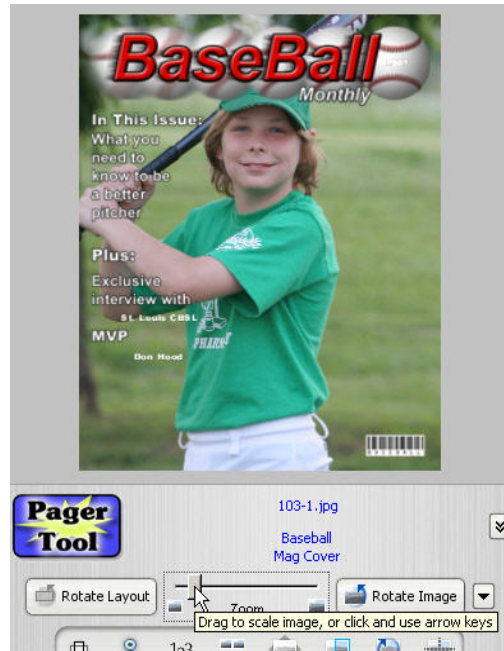
Editing and Cropping

The last phase of Records is the reviewing process. Start by clicking on **Start Reviewing**, then *Review All*.



This will essentially take you back to the main page in ROES, but you will notice a few extra buttons below the Sizes, Options and Add to Order – *Previous, Next, 1/# of products you have created, Auto and Cancel Review*.





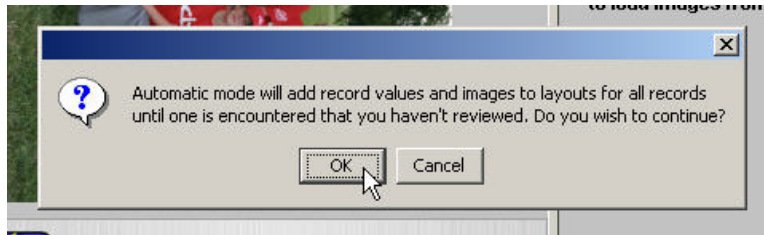
You will need to rotate, crop or adjust each product at least one time. After adjusting the first of each product, whatever it may be, click on the **Next** button to be sure the crop, rotation etc. is holding from one to another of that product.



Once you are sure you have checked at least one of each product included in all the packages, you can click on the **Auto** button.

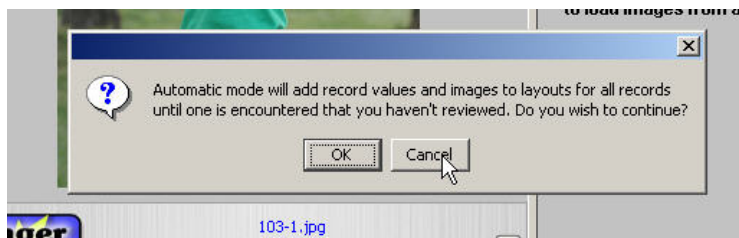


A dialog window will pop up asking if you wish to continue. Click OK.

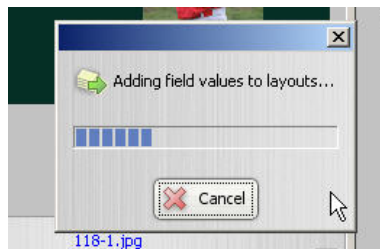


After clicking OK, the program will automatically begin filling the packages with all of the data from your rows and columns that you have previously set up, with all the cropping and adjustments that should be applied as well. You could, at this point, leave your computer unattended while the program completes the package filling process.

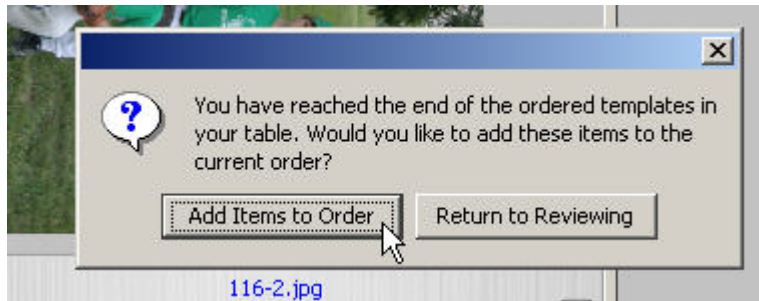
If you have skipped editing on a product, the review process will stop, a pop up window will appear letting you know that you have missed it, and ask you if you wish to continue. At that time, click on **Cancel** and do the needed editing before continuing the Auto review process.



If you choose to continue, the process will stop each time the system comes across this product. At any time, you can **Cancel Review** and go back to do additional cropping. Each item will appear on the screen as it fills.

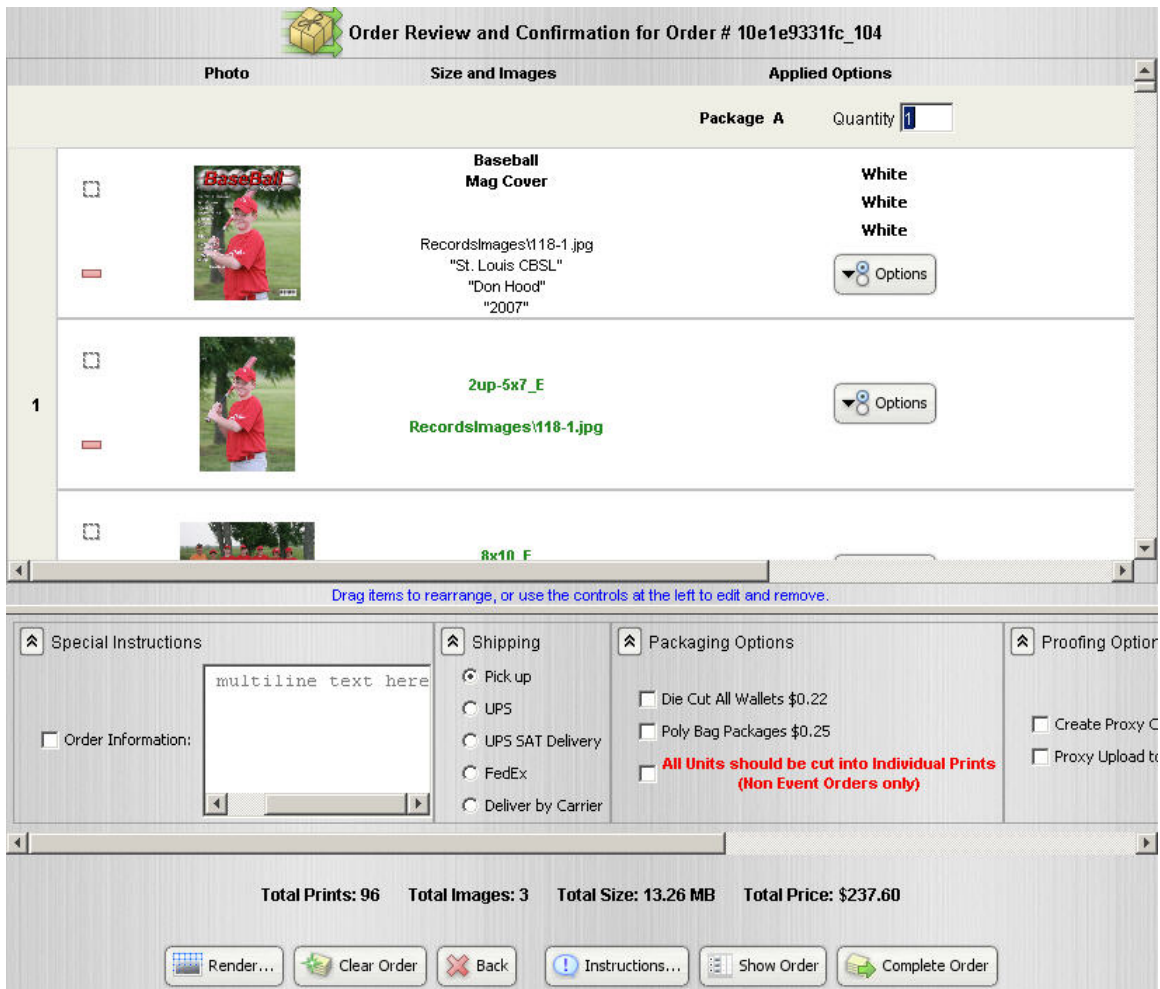


Once complete, a new dialog box will pop up letting you either add all of these items to the order or *Return to Reviewing*. Clicking on **Add Items to Order** will open the traditional Order Review page.






Reviewing and Sending the Order

From this point, the steps taken to review, edit and send the order are the same as a typical ROES order. As in placing an order using the Packager, the packages and quantity ordered are identified as well as each item within the package. The Edit and Delete buttons to the left of the thumbnails function in the same manner, as does the Show Order button at the bottom of the window. Once any changes necessary have been made, simply click on the Complete Order button and proceed as with any other ROES order!



Order Review and Confirmation for Order # 10e1e9331fc_104

Photo	Size and Images	Applied Options
	Baseball Mag Cover RecordsImages\118-1.jpg "St. Louis CBSL" "Don Hood" "2007"	White White White Options
	2up-5x7_E RecordsImages\118-1.jpg	Options
	8x10_F	

Package A Quantity 1

Special Instructions: multiline text here

Shipping: Pick up, UPS, UPS SAT Delivery, FedEx, Deliver by Carrier

Packaging Options: Die Cut All Wallets \$0.22, Poly Bag Packages \$0.25, All Units should be cut into Individual Prints (Non Event Orders only)

Proofing Options: Create Proxy C, Proxy Upload to

Total Prints: 96 Total Images: 3 Total Size: 13.26 MB Total Price: \$237.60

Buttons: Render..., Clear Order, Back, Instructions..., Show Order, Complete Order

Using Records without a Spreadsheet

The ease and speed of using Records to fill large orders is a tremendous asset in the ROES system. Fortunately, for those of you not familiar with using a spreadsheet, you can still take advantage of the program with little difficulty. Once the data portion of the workspace has been set up, you will follow the same tutorial for Creating Packages, Editing and Cropping, and Reviewing and Sending the Order as those working from a spreadsheet. The following steps will guide you through the data entering process in a simple, step-by-step manner.

Accessing the Records Tool

The first step in the process, accessing the Records tool, is no different than already explained. Once you have the Records window open, click on the *Images* tab, if it is not already selected. You can now open the folder containing your images by clicking on the **Folder** button at the bottom of the window. The thumbnails will appear in the Images section of the window. Their size can be adjusted using the Zoom button.

Order Information

You are now ready to begin filling the top portion of the window with information typically provided by the spreadsheet. Double clicking in any space allows you to enter text. When you need to place an image, you may simply drag & drop the image into place. So, let's begin!

Individuals

Double click in the first box below the *Field* heading. You can give each line whatever title you prefer, as long as you can identify them. This row would ideally be the individual image, so you could title it just that – 'individual.' Once you have the title in place, you will need to drag and drop each individual into its own column. If you have more individuals than columns, right click anywhere within the workspace and select *Add Columns*. You can enter whatever number is needed and click OK. Continue adding the images until all the columns are filled.

Groups

If you have a group image that will correspond with the images, they can be placed in the second row, but that row will first need to be given its title. Double click in that row under the Field header and type in the information you desire – 'group,' 'team,' etc. Now, drag and drop the group image into the first column. If this group applies to all the images, right click on the image and select *Copy Value to Entire Row*. If you have more than one group, drop the group into the first image to which it applies. It should be highlighted in blue. Using the shift key on your keyboard, select the images to which this group applies, after which they should ALL have the blue highlight. Now, right click on the group image and select *Copy Value to Selection*. A pop up window will ask if you are sure, click OK. The new group should now fill all the columns you had selected.

Individual Names

If you are using products that include the individual's name, you will need to create a row for the first as well as last name, unless they will be used together throughout the order. Double click in the next available row in the Fields columns and type 'First name.' As with each individual image, you will now need to type each first name. (If last names are going to be included, you may wish to also create the row for 'Last Name' at this time, making it less confusing when filling in all the names!

Packages

Give your package row a title that states simply that – 'Package.' Enter the packages ordered below each individual using the package format you have entered. Records will default to P-Q, 'package – quantity,' with a comma separating multiple packages. Fill in the package information as needed throughout the order. You may select all images that need a particular package and copy that package information to them. However, you cannot add additional packages or optional items in that manner. To add packages or items, double click in the box needed. This will allow you to type in the additional information needed. Be sure to include the comma to separate any packages and items!

Group or Team Name

Use the same method as above to give your group name its title. Be careful not to give it the same title as the image of the group! If the same title will apply to all the images, you can, as before, type it in one time, left click to highlight the box, right click and select *Copy Value to Entire Row*. Or, use the shift key to select the images to which it applies, right click and select *Copy Value to Selection*. To enter a second team or group name, double click in the row and column below the first new group image and type in the correct group name. As before, select the images to which this new title applies and copy the title to them. Any time you choose to copy information to another column, you will be asked if you are sure!

Other Titles

The list could go on forever! You are well familiar, by now, with the steps it takes to add a new row and fill in the proper information. If, by chance, you need additional room, you can right click and select *Add Rows*, just as you did with *Add Columns*. It will ask you the number of rows you need to accommodate the information you need to complete your order.

You're on Your Way!

You may now begin the process as those working with a spreadsheet! **Creating Packages** begins on page six in this tutorial. Refer to the instructions through page eight to complete your order!