



Richmond

Professional Lab - since 1938

SIMPLE ROES EVENTS SYSTEM TUTORIAL

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SCHOOLS & GROUPS



SPORTS & EVENTS

Modified: 12/16/15

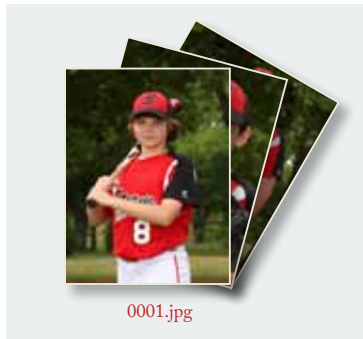
INTRODUCTION TO ROES EVENTS

ROES Events can be used to manage both data-intensive orders or to automate a simpler workflow. This guide will walk you through how to use ROES Events to streamline your workflow with minimal data management. If you would like more information on the full capabilities of ROES Events, please view our Advanced Events Tutorial guide.

IMPORTING DATA

	C	D	E
me	Last Name	Team Name	Packages
	Wiggins	Storm	B-2
	Cosby	Storm	C-1
	Craig	Storm	A-1;M-1
	Winston	Storm	A-1
	Williams	Storm	B-2
	Messner	Storm	D-1
	Tanner	Storm	E-1
	Black	Storm	A-1
	Zane	Storm	B-2
	Lutz	Storm	A-2
	Taylor	Storm	G-1

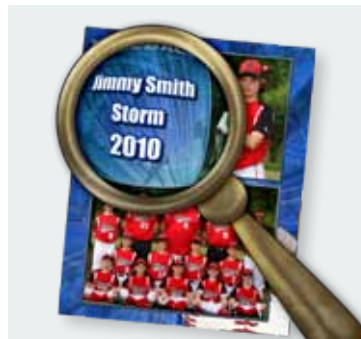
MATCH IMAGES TO DATA



CREATE PACKAGES



REVIEW



PREPARING YOUR DATA FILE

Though you do not need a data sheet to utilize ROES Events, the most efficient workflow is to create a simple spreadsheet before building your order. In a program such as Excel, simply create a new column for each type of data to be used in your final products. Filename and Packages are the only two fields required to process an order through ROES Events. Any additional data you would like printed on products in the order or that should appear on the labels the lab will apply to each sitting should be added in Excel as well. . If you would like more information on the full capabilities of ROES Events, please view our Full Events Tutorial guide. This guide will walk you through the simplest way to use ROES Events.

✓ TIP

If you are a Windows user there is a shortcut to adding your filenames to Excel. Download the Copy Filenames program found here - <http://www.extrabit.com/copyfilenames/>. After running the installer, simply select all the filenames you need to copy into your spreadsheet, right click and select Copy Filenames. Then select your Image column in Excel and paste. Your filenames with the .jpg extension included should appear. If you are a Mac user you can simply highlight the filenames in your folder and paste them directly into Excel or Numbers.

When saving your data, be sure to there are no commas in your data and save it in CSV format. In the CSV format a comma creates a new column. If necessary, commas can be added in Events after your data has been imported.

Do not title any data column “**Subject ID.**” Doing so will cause your order to error at the lab.

It is worthwhile to consider using the same field names for any job that will be ordered using the same package group. Once we begin assigning data fields to your packages, you will see why.

! IMPORTANT

In preparing your data and assigning your field names, you must refrain from using any special characters. Common special characters include punctuation marks and symbols such as @, #, &, *, ~, etc. For example, when entering someone’s height you would input 5 ft. 6 in. instead of 5’6”. Special characters will cause errors in the processing of your order at the lab and typically result in the order needing to be completely rebuilt.

ADDING A GROUP IMAGE OR LOGO TO YOUR DATA

If you have group images or any other graphic that needs to be distributed to multiple sittings it is best to set that up in Excel. Create a column for the image. Insert the filename in the first cell and click and drag the square icon at the corner of the cell down to the last row that should be associated with it. Excel will copy the filename to all of the cells that are selected when you release the mouse button. Repeat as needed.

PREPARING YOUR DATA FILE CONTINUED

ENTERING THE PACKAGE DATA

The packages field uses a “P-Q” format in which “P” is your package name, and “Q” is the quantity of that package ordered for that record.

When entering your order data, remember that your data must be consistent with the names of the packages you build in ROES. If multiple packages are ordered, separate them by a semi-colon. For example, if one of Package A and two of Package B were ordered for the same file, the Packages column for that record should read “**Package A-1;Package B-2.**” The package naming system you use is completely up to you. The important thing is that the name of the package in ROES matches your data exactly and that the P-Q format is used when entering your orders into the spreadsheet.

SORTING YOUR DATA

Your data should be sorted before you proceed to the next step. If you would like the groups sorted alphabetically by last name and then by teacher/coach, for instance, use Excel’s sorting options to reorganize. Your order will be packaged at the lab in the same sequence you see in Excel. See Appendix A at the end of this document for more information on Excel’s sorting capabilities. If you would like us to bundle by a particular field (i.e. Team) please leave an order comment in the Special Instructions for Lab section in the Shopping Cart tab.

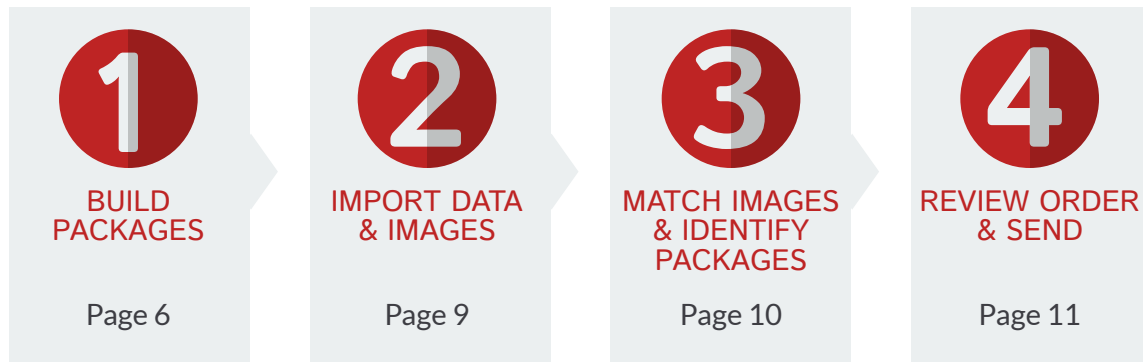
EXCEL DATA FILE

	A	B	C	D	E	F	
1	First Name	Last Name	Grade	Team	Filename	Packages	Sort
2	Tina	Smith	9	JV Volleyball	7480.JPG	A-1	6
3	Jessica	Black	9	JV Volleyball	7505.JPG	B-1	2
4	Nicole	Johnson	10	JV Volleyball	7517.JPG	C-1	4
5	Dana	Davis	10	JV Volleyball	7519.JPG	A-1; C-1	3
6	Jenny	Adams	9	JV Volleyball	7571.JPG	B-2	1
7	Tiffany	Jones	9	JV Volleyball	7575.JPG	A-1	5

NOTE

It is important to include the entire file name PLUS its extension in the data cell of your data file. For example, “7575.jpg” is acceptable while “7575” is not. For a shortcut to add filenames to data, see the second paragraph of the Preparing Your Data File section. If you are entering your filenames manually, Excel can quickly add the .jpg extension for you. For more information, see our Excel Tips and Tricks document in our Advanced Events Tutorial guide.

RECOMMENDED ORDER OF OPERATIONS



1 BUILD PACKAGES

As soon as you have your product and template offerings set you can build your packages in ROES. It is recommended that you build the packages before your shoot so that you can process the job more quickly after the event.

Launch ROES and select the Create Order tab. In ROES packages are called Favorites. Build a set of Favorites here that will be used for your job. If you haven't built Favorites in ROES before please reference our tutorial video - <https://youtu.be/WCYCpdjzOG8>

Next, create a sample data sheet. You'll need to have all of the field names in this data sheet that you'll be using on the final job. You only need to enter data for one subject and nothing needs to be real except the filename - this is only a sample. If you're building your packages after the shoot and your full data set is already complete you can of course use that. Save the file as a CSV and launch ROES.

Proceed to the Events tab. This is the Events homepage. As you process jobs through Events, they will all be saved here. This page will display all of them. To create a new job, click the plus sign in the lower left corner. You will see "Untitled" appear under the Name column in the upper left. Double click on "Untitled" and rename the job appropriately. You can add and modify columns to the Events homepage using the gear icon in the lower left. Double clicking on the name of any column will sort the list alphabetically by that column.

If you are only building packages at this stage, this job will only be used for that purpose. You'll set up a fresh job to process your order.

BUILD PACKAGES CONTINUED

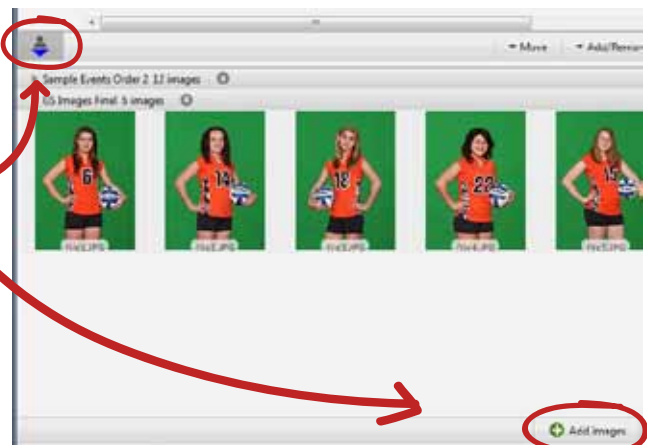
Click on Subject Info in the lower right corner, then in the first section, choose “**Import data from a CSV file**” and click Next. Browse to your file. Now you’ll see a preview of your data. It should look just like your CSV did in Excel. If your data is jumbled, it’s likely that it was saved in a format other than CSV or contains commas that are separating the columns inappropriately. Click Back, edit your file in Excel, save your changes and reimport. Once it looks correct, be sure to check the box “**First Row Has Field Names.**” Next it will ask you to choose your package group. Choose the one you will use for your upcoming shoot. Proceed to the next step. Browse to the folder that contains the images in your data file. After clicking Next again you’ll see your images and data populate.

Click on the field name of the row that has your filenames. Next click on the Images button at the bottom of the screen. Choose Match Images → Use Thumbnails. This will match up the images with your filename row.

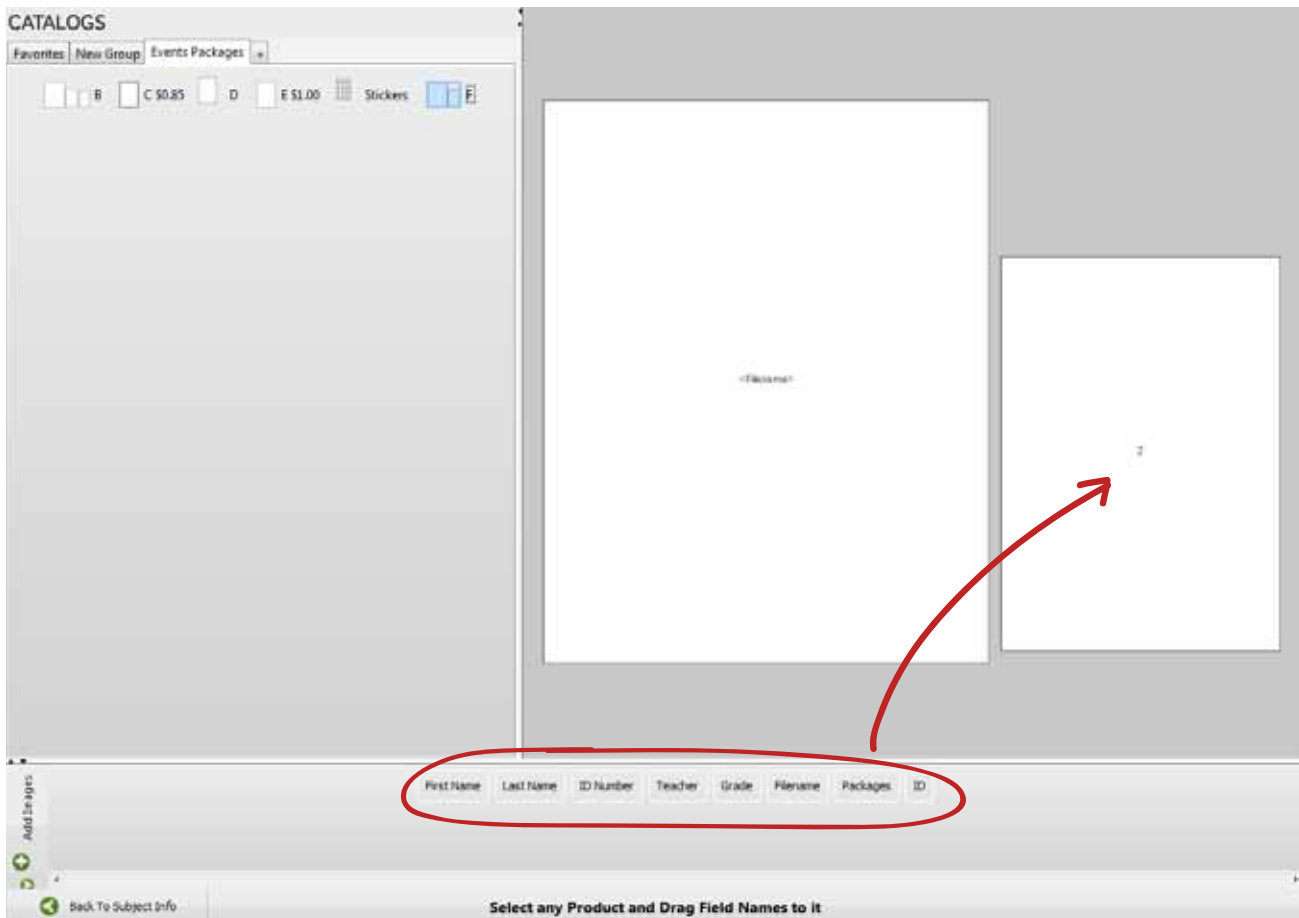
Next we’re going to associate the appropriate fields with your image and text nodes. Click Associate Fields in the lower right. If you need to change the package group associated with your job first, click on the gear icon at in the center right of the screen.

NOTE

To open a different folder of images than you originally selected click the Add Images button in the center of the bottom of your screen. You may only have one folder of images open at a time. If you would like to hide the images panel completely, click on the symbol with the human icon and the blue arrow on the far left.



Now that you’re in the Associate Fields section you will see all of your Favorites on the left. Switch to the group you need to finish setting up. Select the first package or item. A white canvas representing each product will appear in the middle of the screen. If you hover over the canvas a description of the product and the quantity will appear at the top. Below the canvases you’ll see all of the field names from your data sheet. Drag and drop the appropriate field name onto each product and each text node you wish to use. Please see our tutorial video “Assigning Fields to Packages” for a visual demonstration.



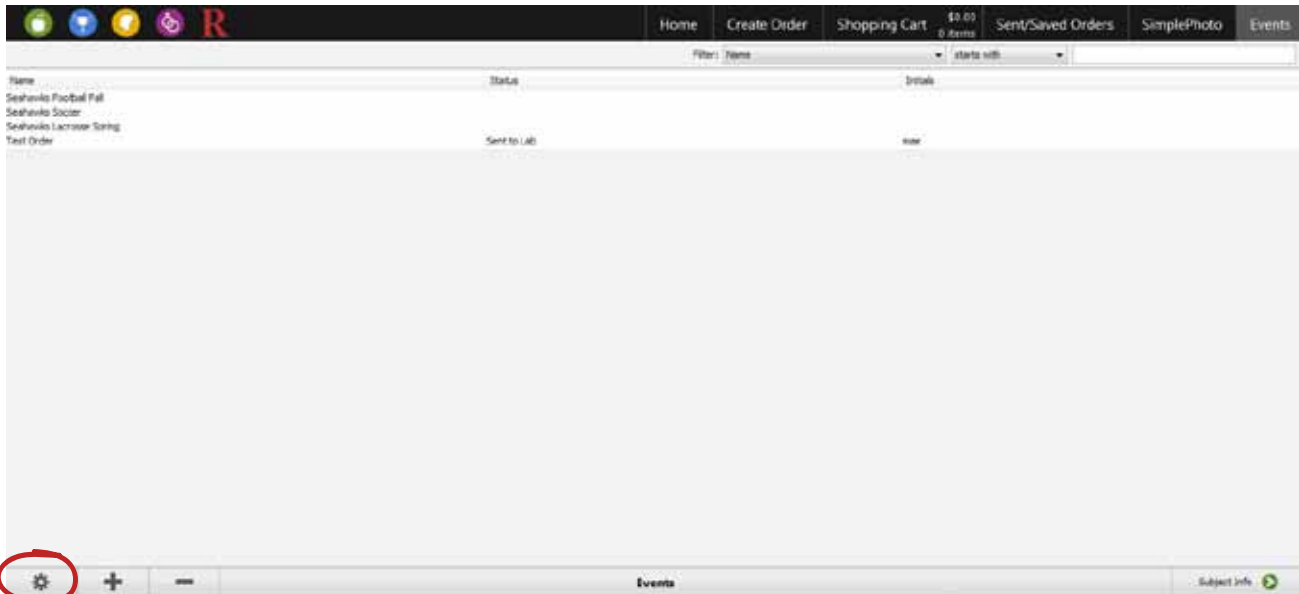
Repeat this process with all of your products. If you need to modify a package, go back to the Create Order tab and modify it. When you switch back to the Events tab you'll see the update. Take care to be sure your Favorites group only contains products from one catalog. You won't be able to submit your order to the lab if it contains products from two catalogs.

Once you've finished associating all fields, your package group is ready to be used. The field association will always be saved. If you need to make a quick change to it you can always go to the Associate Fields section again and modify a package or item before reviewing your order.

2 IMPORT DATA & IMAGES

Once your data is finished and your packages are built you're ready to process a job from start to finish.

Launch ROES and proceed to the Events tab. This is the Events homepage. Over time this page will display all of the jobs you have processed through ROES Events. To create a new job, click the plus sign in the lower left corner. You will see "Untitled" appear under the Name column in the upper left. Double click on "Untitled" and rename the job appropriately. The Status column can be updated by you at any time. It is intended to provide a space for notes and record keeping. Double clicking on either the Name or the Status column will sort the list alphabetically by that column.



NOTE

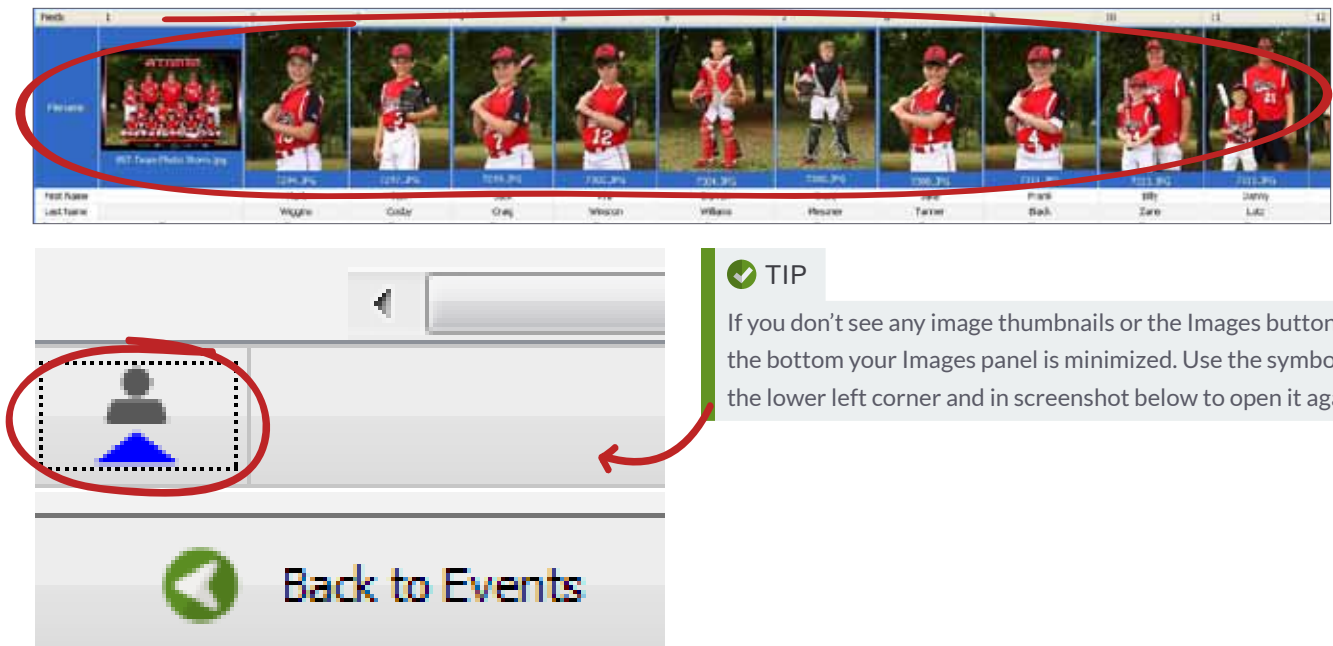
You can add and modify columns to the Events homepage. Use the gear icon in the lower left. There you can either select an existing field and edit it or add/remove a field using the plus (+) and minus (-) signs in the lower left corner of the window. The Initials column in the screenshot above was added this way.

Once your job is created, click on Subject Info in the lower right corner to proceed to the next step.

In the first section, choose "Import data from a CSV File" and click Next. Browse to your file. Now you'll see a preview of your data. It should look just like your CSV did in Excel. If your data is jumbled, it's likely that it was saved in a format other than CSV or contains commas that are separating the columns inappropriately. Click Back, edit your file in Excel, save your changes and reimport. Once it looks correct, be sure to check the box "First Row Has Field Names." Next it will ask you to choose your package group. Choose the one you will use to process this job. Proceed to the next step. Browse to the folder that contains your images. Next you'll see your images and data populate.

3 MATCH IMAGES & IDENTIFY PACKAGES

Click on the field name of the row that has your filename. Next click on the Images button at the bottom of the screen. Choose Match Images → Use Thumbnails. This will match up the image(s) with your filename row.



TIP

If you don't see any image thumbnails or the Images button at the bottom your Images panel is minimized. Use the symbol in the lower left corner and in screenshot below to open it again.

Now click on the field name of the row that has your packages. Click on “Use as Packages” in the center of your screen. Click on another row to deselect the packages row. If the cells are green the package data is ready to go. Any pink cells have a problem. The most common problems are a discrepancy in the package name or a formatting issue. The name of the package in your data must be exactly the same as the package name in ROES. The format must be Package Name-Quantity (i.e. A-1 to order 1 of a package called “A”). A semicolon should separate multiple packages (i.e. A-1;B-1 to order one of both packages A and B). To double check the package group you selected, click on the gear icon at the center right. To view or edit the details of your package group, go back to the Create Order tab.

NOTE

You can quickly make edits to your data even after you import it into ROES. Double click on the cell you need to edit and adjust as needed. If you need to add, remove or rearrange columns, right click on any cell in the table for a menu. You can also adjust the column sequence by dragging the columns using the top row labeled Fields. The sittings will be packaged and returned to you in the sequence you see in ROES. If your data still needs extensive sorting, it would be faster to use Excel. See Appendix A for tips on Excel's sorting function. If you decide to make the edits in Excel and reimport, you can easily do that. When you're ready, simply click the Import File button in the center. Browse to your updated spreadsheet and click Open. Note that this will completely overwrite your current table and all images and packages will have to be reassigned.

Once all of your package cells are green, review the rest of the table for any issues. All subjects should have an image associated with them and a package ordered. If a package is ordered for a subject without an image the order will error and have to be rebuilt. Check to be sure that no subject has a package ordered with a quantity 0. This will cause the order to error.

4 REVIEW ORDER & SEND

With your data and images matched and your packages defined, you can now review your order. All subjects can be reviewed or only selected records. To review only certain records, simply select the particular columns you would like to review. Click the “**Start Reviewing**” button and choose whether you would like to review the entire record set or only selected ones. Only the records you review will be added to your cart at the end of the review.

Click Start Review in the lower right corner to begin. Here you can check cropping and overall accuracy of your order. One package will be displayed at a time. Click the right arrow to advance to the next package. If you would like to activate auto review, click on the far arrow. The auto review tells ROES to advance through your order and only stop on a product that you have not yet reviewed for cropping.

✓ TIP

To fully utilize the auto review option, your images should be pre-cropped to an 8x10 aspect ratio. That will allow 5x7 products to crop in at the sides rather than affect the headspace. If your images are already cropped you'll set your images to be zoomed all the way out on all products during your review. Adobe Lightroom is an excellent tool for cropping your images prior to ordering.

When the review is complete you can add all of the reviewed items to your order or return to reviewing to make changes. In the Shopping Cart tab you can change package or item quantities, edit the item to adjust cropping/zoom or add services, indicate the shipping method, choose your packaging option and add internal order comments and instructions for the lab.

Once your order is ready, send it to the lab.

By default your order will be packaged by sitting with a 2x3 label on each sitting that includes record number, a small thumbnail, file number, and pertinent data fields in your spreadsheet. If there are particular fields you would like included on the label, please leave a comment in the Special Instructions for Lab section.

DSC_0006-1-02.JPG	R052348	18
	League Name	Walnut Country Storm
	First Name	Jimmy
	Last Name	Smith
DSC_0052-17-18.JPG	packages	Champion-1; G-1; R-2;
		

For more information on ordering green screen dropout or multiple poses through Events please see our Advanced Events Tutorial guide. Our Advanced guide also includes an appendix with several Excel tips and tricks to speed up your data entry.

This concludes the ROES Events System Tutorial. For further assistance, please contact Customer Service.

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