

Section 1: Importing Data

Data entry is the most time consuming process involved when entering a school order. In addition to being time consuming, it is vital that mistakes not be made when linking the appropriate data to the correct image. To help lessen these issues our software offers the option to import a text file (csv format) so that you do not have to manually enter all of a child's information. This process is one of the steps in the order creation process.

The image below is the data import screen. It has been broken down into eight sections which will be discussed in the correspondingly numbered sections that follow.

The screenshot shows a data import interface with the following sections:

- 1**: File selection area showing the path `C:\Users\allenb\Desktop\PrintQueryToExcel_20140203_104811_0468223 (1).csv` and a `Browse` button.
- 2**: Delimiter dropdown menu set to `Comma`.
- 3**: `Start import at` input field set to `0`.
- 4**: `Options` section with `Auto generate ID field` set to `1000`.
- 5**: `First row contains field names` checkbox, which is checked.
- 7**: `Verify data and match field names` section with an `Import` button.
- 8**: `Field Options` section with a warning message: `Make sure all relevant fields are mapped to data before importing. Fields are case sensitive.` and buttons for `Labels` and `Camera Cards`.
- 6**: Field mapping section on the left with dropdowns for `LastName`, `FirstName`, `Grade`, and `Teacher`.

LastName	FirstName	Grade	Teacher
Arnott	Aspen	0	Slaten
Contreras	Harlyee	0	Slaten
Davidson	Charlee	0	Slaten
Foskett	Charles	0	Slaten
Guiza	Desiree	0	Slaten
Jaramillo	Erica	0	Slaten
Lewis	Isabella	0	Slaten
Marquez	Kellani	0	Slaten
McDaniel	Joeseeph	0	Slaten
Melashenko	Colben	0	Slaten
Palato	Ella	0	Slaten
Pruitt	Colleen	0	Slaten
Scott	Joshua	0	Slaten
Valencia	Emily	0	Slaten

1. Choose a file

Click on the browse button to choose the file that you wish to import. Once the file is selected its path will show up in the text box to the left of the button. At this point the software will not let you browse away until you have finished the importing process. ***If you need to leave the page before you complete the process delete the path from the text box.*

2. Select Delimiter

Choose the proper delimiter based on your file. We recommend that you use only a comma delimited text file (csv) which is what the software is defaulted to.

3. Start import at row

This is used if your csv has rows above where the data starts that you do not wish to import. ***You will probably never need to use this feature. Leave it set to zero.*

4. Auto generate ID field

Our software requires an ID number to bind data to an image. If your csv does not have one you can check this box to generate one automatically. ***If your school requires ID cards or any Administration CD (Powerschool, SASI, ect.) these generally require an ID number.*

5. First row contains field names

If your data file contains headers (fields that denote what each column of data is), you will want to have this option checked. The software will automatically map the fields if they match data fields in our software. ***Be sure that this is not checked if you do not have headers. It will cause the first row of data not to be imported. See the list of data fields on page six of this document for available field names.*

6. Map Fields

If your data does not have headers you will need to assign fields manually. There will be a pull down menu for each column in your data file. Using the pull downs map them to the proper field in our software.

7. Import Button

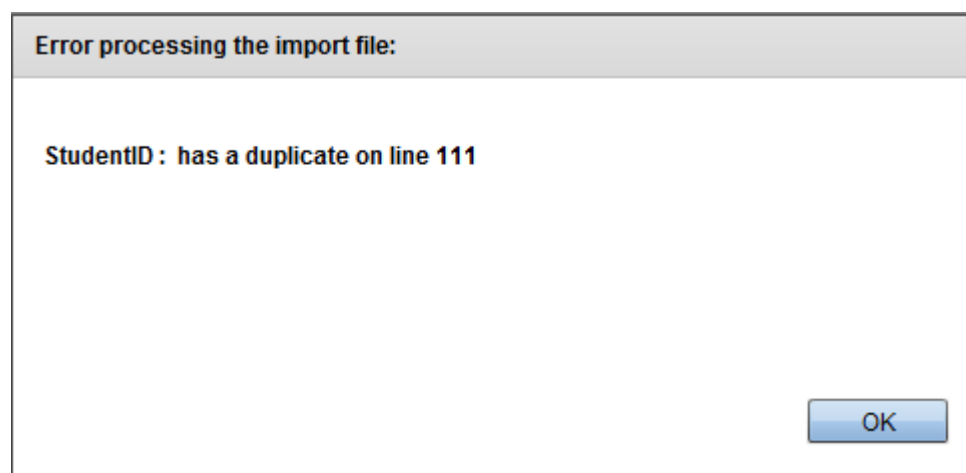
Before clicking this button, be sure that all of the options listed above are correct, double check that all of the fields are correctly mapped as well. If all is well you will shortly receive a message stating how many records were imported. ***If you get any other message please refer to the section “Problems importing data” on page three in this document.*

8. Print Labels or Camera Cards

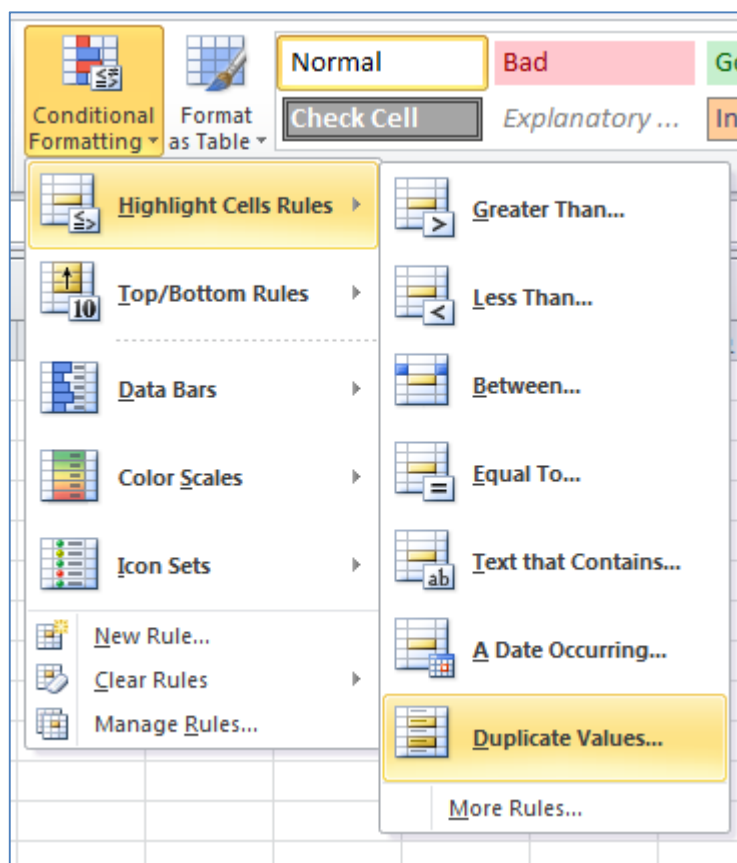
This option enables you to print up either Avery 5160 or camera cards with barcodes that can be used in conjunction with a barcode scanner to pull up each subjects data.

Section 2: Problems importing data

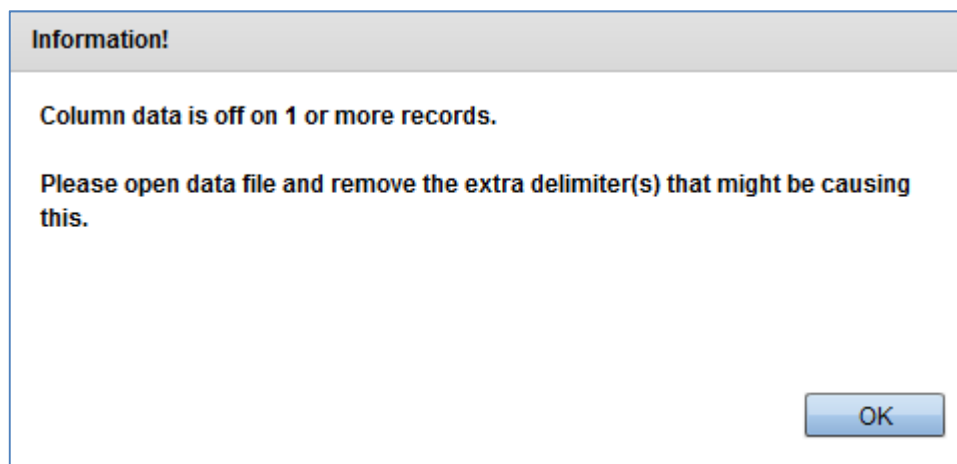
Duplicate IDs



Generally this error means that a subject is listed in the data twice. You will need to open the file in an external editor and remove the extra records. *Newer versions of Microsoft Excel have a hand function built in called conditional formatting that allows you to select the student id field and highlight any records that are duplicates.*

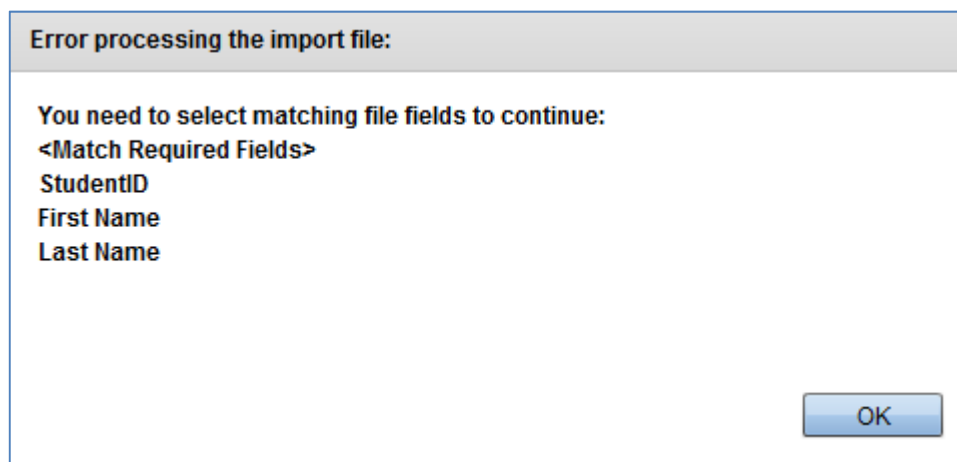


Column data is off



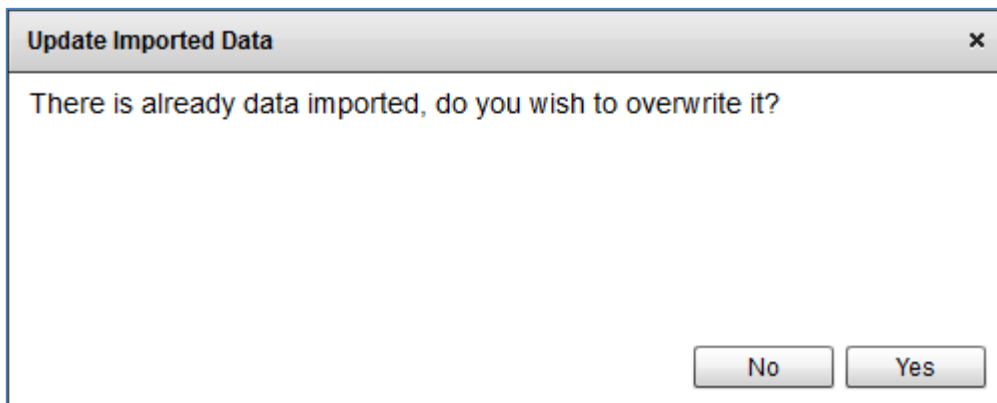
This is generally a sign that there is an extra comma in your data that is throwing off the student ID column. These errors are usually caused by suffixes (name) such as jr., sr., etc. To deal with these just open the csv in Excel and do a search for commas and remove them.

Required fields



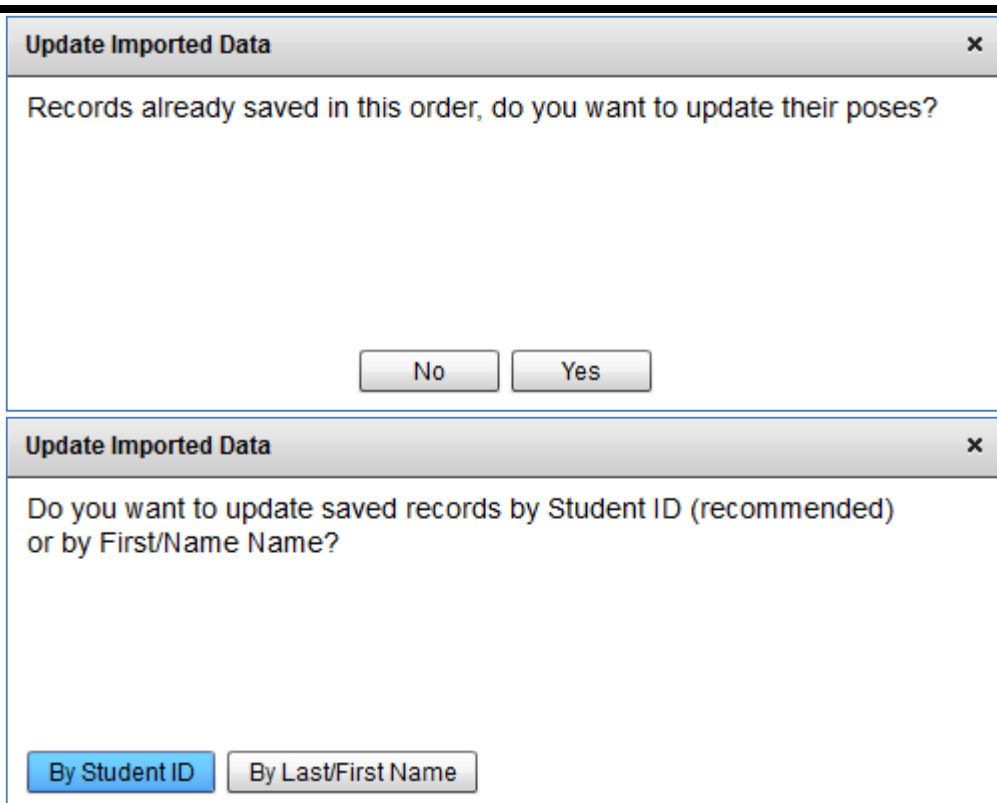
The software requires student id, first name, and last name to be mapped. Check that all three of these fields are mapped. *If you have no student id column be sure that auto generate student id is checked.*

Update imported data



If you have already imported data for this order, this will pop up to confirm that you wish to overwrite the original csv.

Update saved records



This message will pop up when you have saved records in the build screen. It is meant to be used when you need to update data for students already entered. Often times the school will realize that they have provided incorrect data to you, or you may have imported the wrong data (perhaps last year's data). Instead of having to go back and reenter the order you can simply use this feature to update the existing data. *Be sure that if it is not your intention to update the data that you click "No" on the first dialog.*

Section 3: Fields

List of data fields that are available in our software for importation (Denote required fields)**

****StudentID**

****First Name**

****Last Name**

School

Teacher

Grade

Category

Email

Address

City

State

Zip

Area Code

Phone

Gender

Date of Birth

Custom1

Custom2

Custom3

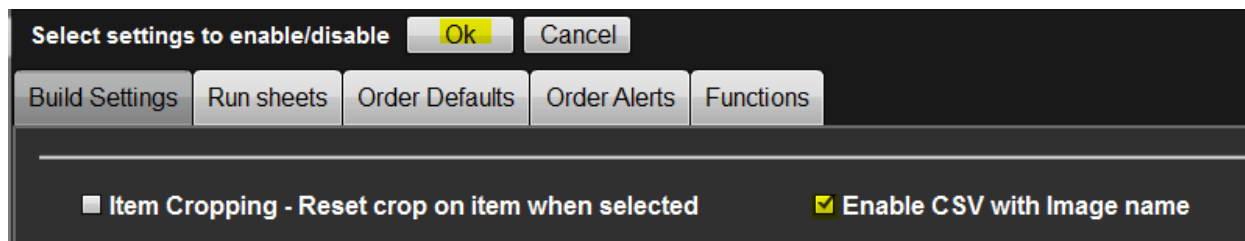
Custom4

Custom5

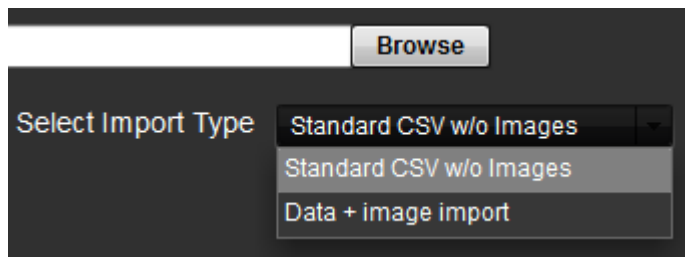
Importing Images with Data

There are many aftermarket software options that can output a file which can be imported into our software that tie your images and data together. Quixi and Fotovelocity are two examples of these. The process is the same as importing data with a few differences that will be gone over in this section. You will need to put your csv into the same folder as your images so that the software knows where to find the images, unless you map an image path field (which is not otherwise required).

1. Enable CSV with image name in the school software settings screen. The settings can be accessed through the administration menu in the upper left corner of the software. Check the box next the words “Enable CSV with image name” and then click OK.



2. When you get to the import screen a new pull down menu will appear. To import data that matches up with images, select “Data + image import”.



3. You will need to be sure that your csv has an image name field in addition to the other required fields mentioned earlier in this document and that it is mapped. In addition to these there are some other fields that you can map.
 - a. **Group Image Name** – If your packages have any products that call for group images, you must have a column with a group image name listed.
 - b. **Group Image Path** – If your group images are located in a directory other than where your csv resides, this tells the software where to find the images.
 - c. **Image Path** - If your images are located in a directory other than where your csv resides, this tells the software where to find the images.
 - d. **Packages** - This allows packages to be automatically assigned. The format is as follows: “A-1;C-2 “ where your packages are named one A package and two C packages. You will always need to have a package name and quantity separated by a hyphen. Semi-colons are used to separate package/quantity pairs.

- e. **Name/year on prints** – If you require name or year on your standard print items (names for specialty items such as calendars or memory mates are taken from the first name field, this is only necessary if you wish to have name or year on your standard prints such as an 8x10 or 5x7), there are multiple fields which must be mapped. First you must map the print color (values in this field are limited to Black or White). Secondly you must map Print Name and/or Print Year (the values in these fields must be either All, Wallet, or Null). Third and finally, you must map Print Name Value and/or Print Year Value (this will be the actual data that you wish to appear on the print).
 - i. Print Name
 - ii. Print Name Value
 - iii. Print Year
 - iv. Print Year Value
 - v. Print Color
- f. **Retouching**- This field allows you to order our blemish removal service. The data must be True or False.

Examples

The image below shows what a standard csv with image name will look like when opened in Excel.

	A	B	C	D	E	F	G
1	First Name	Last Name	Student ID	Teacher	Package	Grade	Image Name
2	Brian	Hutchins	1001	Smith	A-1	10th	001.jpg
3	Allen	Blakemore	1002	Smith	B-2	10th	002.jpg
4	Matt	Buzzard	1003	Smith	A-1	10th	003.jpg
5	Rikki	Hansen	1004	Smith	A-5	10th	004.jpg

If you open it in a text editor, such as notepad, it will look like the image below:

```
First Name,Last Name,Student ID,Teacher,Package,Grade,Image Name
Brian,Hutchins,1001,Smith,A-1,10th,001.jpg
Allen,Blakemore,1002,Smith,B-2,10th,002.jpg
Matt,Buzzard,1003,Smith,A-1,10th,003.jpg
Rikki,Hansen,1004,Smith,A-5,10th,004.jpg
```

The image below shows how to format all of the additional csv with image name options:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	First Name	Last Name	Student ID	Teacher	Package	Grade	Image Name	Image Path	Group Image	Group Image Path	Print Name	Print Name Value	Print Year	Print Year Value	Print Color	Retouching
2	Brian	Hutchins	1001	Smith	A-1;C-2	10th	001.jpg	C:\Users\allenb\Desktop\testfiles	Group1.jpg	C:\Users\allenb\Desktop\testfiles\groups						TRUE
3	Allen	Blakemore	1002	Smith	B-2	10th	002.jpg	C:\Users\allenb\Desktop\testfiles	Group3.jpg	C:\Users\allenb\Desktop\testfiles\groups	TRUE	Randy			White	TRUE
4	Matt	Buzzard	1003	Smith	A-1;F-1	10th	003.jpg	C:\Users\allenb\Desktop\testfiles	Group1.jpg	C:\Users\allenb\Desktop\testfiles\groups			TRUE	2014	Black	FALSE
5	Rikki	Hansen	1004	Smith	A-5	10th	004.jpg	C:\Users\allenb\Desktop\testfiles	Group4.jpg	C:\Users\allenb\Desktop\testfiles\groups						FALSE

