



LABELS ON DEMAND

Version 3.0

# User Manual



MAKING **BUSINESS** BETTER.

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# Contact Information

Need to talk to someone? Please use the numbers and email addresses on this page.

## For More Information

Contact your Reynolds Document Consultant directly or e-mail [colorfile@reyrey.com](mailto:colorfile@reyrey.com).

## Reynolds and Reynolds Tech Support

Phone: 877-868-2061

After Hours: 877-542-1799

Help Desk Hours: **Monday-Friday: 8:30 am-4:30 pm EST**

The Reynolds and Reynolds Company  
One Reynolds Way  
Kettering, OH 45430 USA  
800.344.0996

## To Order Supplies

To order labels, laminates, or toner contact your Reynolds Document Consultant directly or order online through [ReySource.com](http://ReySource.com).

Online: [www.reysource.com](http://www.reysource.com)

Phone: 1-800-344-0996

# Entering Data

The ColorFile data grid is specific to the program. The best and most consistent results are achieved when you enter or import data in exactly the order you need the labels printed, and exactly as it needs to be printed.

The data grid is locked in the design to maximum number of characters per field. That cannot be changed from within the program. If you need additional characters for any specific field, or need to add a field for additional data, contact ColorFile Support regarding a label revision.

For example, consider an AccountID number field that is setup for five numbers and driving the color code on the label from the last three numbers. If you enter 00059, the color bands will be 0, 5, 9 on the label. If you only enter 59, no color bands will print.

If you plan on importing from an Excel file, make sure the entire worksheet is formatted as Text before entering data. After saving your work, then Save As a \*.csv file, and click Yes to all prompts. You can copy that \*.csv file then rename it to \*.txt, double click the \*.txt file, and look at it in Notepad.

Suppose you entered one record in Excel, consisting of two fields: a 30 character maximum name (LastName, FirstName MI) and a five character number (00059). The \*.txt file should look like this: "LastName, FirstName MI",00059. This is a standard comma delimited, double quote field separated flat (ASCII) file.

After a row is committed to the database (by entering or tabbing through the row to the next record), the data is in the software until you delete it. If you import data, it adds (appends) the records to the existing data.

You can export data that is entered in the data grid. The exported data can be saved to any location. The data format of the exported data is a comma separated value text file (\*.csv).

**ColorFile Labels on Demand is not designed to be used as a database management tool.**

# Manually Entering Data

## Entering Data

Once a label design is selected, the Enter Data screen appears. To start entering data, select Add New Record to activate the grid.

The screenshot shows a software interface with a grey header containing buttons for 'IMPORT DATA', 'EXPORT DATA', 'CLEAR DATA', 'DEFINE DATA', and 'GENERATE DATA'. Below the header, a blue bar displays 'TOTAL RECORDS: 0'. A table with columns 'select', 'Rec #', 'VIN (17 max)', 'Year (4 max)', 'Service Date (10 max)', 'Make (15 max)', and 'delete' is shown. The 'select' column contains a blue 'select' link. The 'Rec #' column is empty. The 'VIN (17 max)', 'Year (4 max)', 'Service Date (10 max)', and 'Make (15 max)' columns are empty. The 'delete' column contains a blue 'delete' link. A blue link 'Add New Record' is centered in the table. An arrow points from the text above to the 'Add New Record' link.

When the grid is active, Record #1 is ready for input. You may now begin typing data into the fields. Press Enter to move to the next available field.

The screenshot shows the same software interface as above, but now 'TOTAL RECORDS: 1'. The table has one row with the following data: 'select' (blue link), '1' (in the 'Rec #' column), an empty 'VIN (17 max)' field, an empty 'Year (4 max)' field, an empty 'Service Date (10 max)' field, an empty 'Make (15 max)' field, and a blue 'delete' link. The 'Add New Record' link is still present below the table.

After you have entered data into the last field of Record #1 and press Enter, Record #2 is ready to accept data.

<a href="#">select</a>	Rec #	VIN (17 max)	Year (4 max)	Service Date (10 max)	Make (15 max)	<a href="#">delete</a>
<input type="checkbox"/>	1	C895713	2011	092010	Honda	<a href="#">delete</a>
<input type="checkbox"/>	2					<a href="#">delete</a>

[Add New Record](#)

**Record #2 ready for data entry**

You can either enter data manually or by importing more records in the data grid.

To keep the amount of data manageable and efficient, if you print four labels per page, enter data and print in multiples of four when possible. For larger runs, try starting with 40 labels, which is 10 pages of 4-up label paper.

If you wish to archive your data, you should use the Export Data tool and save the exported file for archival purposes.

# Copying and Deleting Data

The grid component used for the program, by design, does not provide database management or data manipulation functionality. The data grid will not, and cannot, change the structure of your manually entered data or your imported data. It will not check for spelling errors, nor calculate formulas. The grid does provide for an extremely robust data component for accurate label printing. Once data is in the grid, it stays there until you delete it.

## Copying Data

- You can copy an individual field by clicking once in the field you want to copy. All data in the field will be selected upon clicking once in a field. If you click in the field a second time, the data will de-select.
- With the data selected, right-click once, then click Copy.
- Right-click in the field where you would like to place the data, then click Paste.
- There are no multiple select functions for copying.

## Deleting Data

To clear (delete) all data, do one of the following:

- Click on the Clear Data item above the Data Grid. A Warning dialog will appear. Click Yes to confirm and delete **all** records from the grid.
- Single records can be deleted by selecting the check box to the left of the record #, and then pressing delete at the end of the row. Click or enter Yes to confirm.
- Multiple rows can be selected using the SELECT drop down menu. Press Delete on the header row to delete either the selected records or all records.

Cannot Undo! **Delete** is permanent!

# Importing Data

The Import Data feature can save you large amounts of time and can make your filing virtually error free. Getting the source data set-up correctly before importing is critical to getting the labels to print accurately. If you are using a Reynolds ERA system to manage your business, you can use the QueryBuilder program to extract information from your system and use the Import Data feature to upload that information and print out filing labels. Contact ColorFile Technical Support for assistance in setting up a query to meet your needs.

## File Types That Can Be Imported

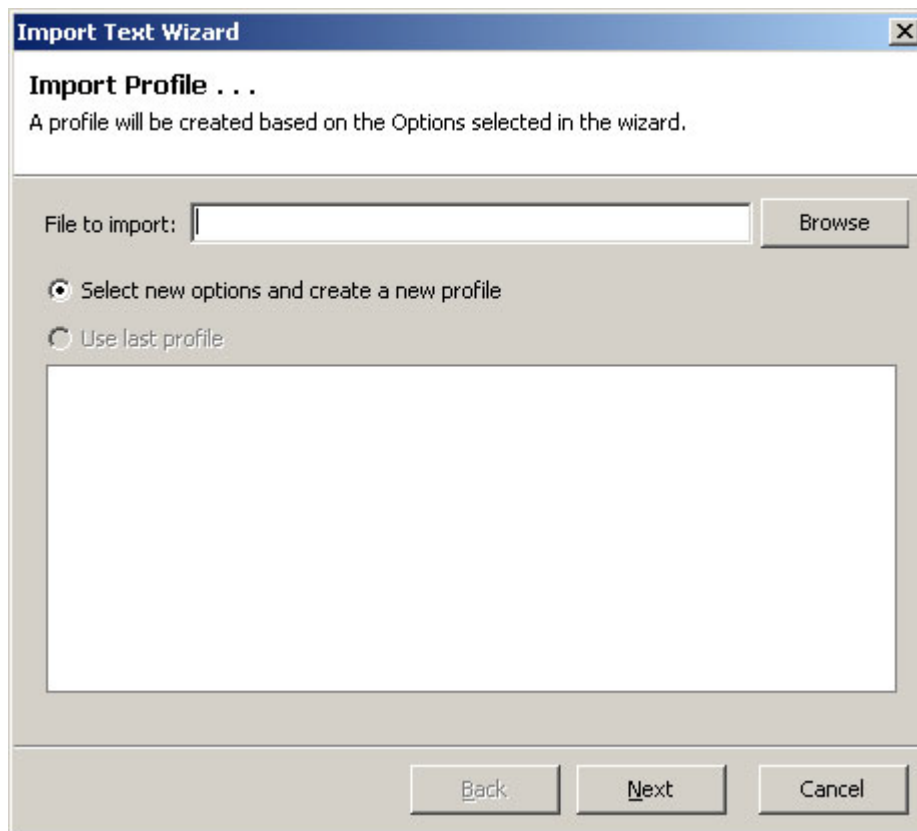
Delimited text files with \*.csv or \*.txt extensions can be imported. Delimited means there is a specific character between each field, like a comma. If applicable, fields that have a comma in them, like a LastName, FirstName field, will have quotation marks around that field to tell the program to treat the information inside the quotation marks as one complete field.

- A \*.csv file is normally associated with a Microsoft© Excel file type, as a comma separated value file. If you copy & paste a \*.csv file then rename it to a \*.txt file, the file will open in Notepad as a readable text file. This is a good way to look at the data and make sure what you see is what you want for each field.
- Some programs (Excel, for example), will format certain data types automatically and put control characters in the file. Sometimes these control characters will alter the desired output. Date and numeric fields are particularly susceptible to auto-formatting and control character issues.
- For Excel workbooks, format the entire worksheet as Text before entering any data. That way, the Save As \*.csv file will be a flat, plain text file without any control characters.

The comma delimited, double-quote field separator format (like the \*.csv example above) is the preferred file format. This format is easy to use in several programs, especially Excel. You can look at large files easily by opening with Excel and checking for any inconsistencies before importing and printing. Double quotes around the fields, even if there are no commas in the field, are acceptable.



Clicking on Import Data will take you to the following screen.



### **Select New Options and Create a New Profile:**

If this is the first time importing data for a specific label design, this screen will be blank.

File to import:

Click the Browse button and navigate to the path / file location of the source data to be imported. Must be a \*.txt or \*.csv file type.

Click the Next button to go to the next required screen, Text Options.

### **Use Last Profile**

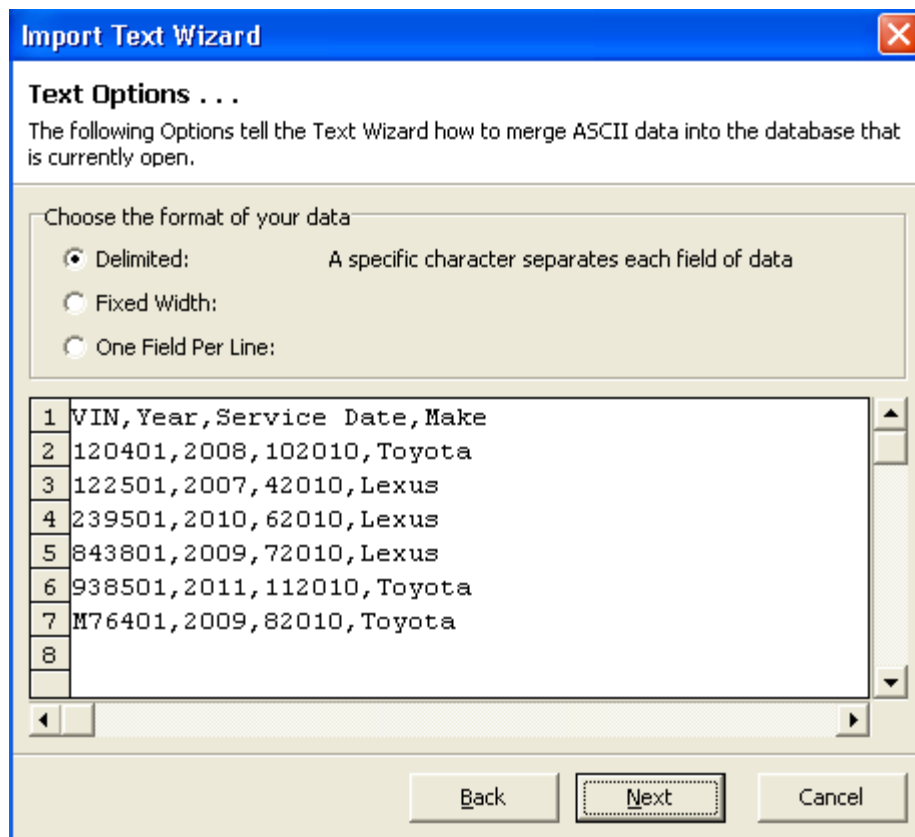
To import accurately using the last profile option, every option must be exactly the same, starting with the file name and location, and all the way through field mapping.

If this is not the first time you have imported data for the specific label design you are working with, the "Use last profile" button will be selected by default. You will see the settings used for that last import session in the white list box. If any file locations, settings, etc. have changed since the last time you imported a file, click the Select new options and create a new profile button.

Click the Next button to automatically apply all last used options to the new import session. The data is loaded and you will be taken back to the data input grid.

If there are any records existing in the grid when you import data, the imported data will be added to the existing records (appended), and will not overwrite records already in the data grid.

## Text Options

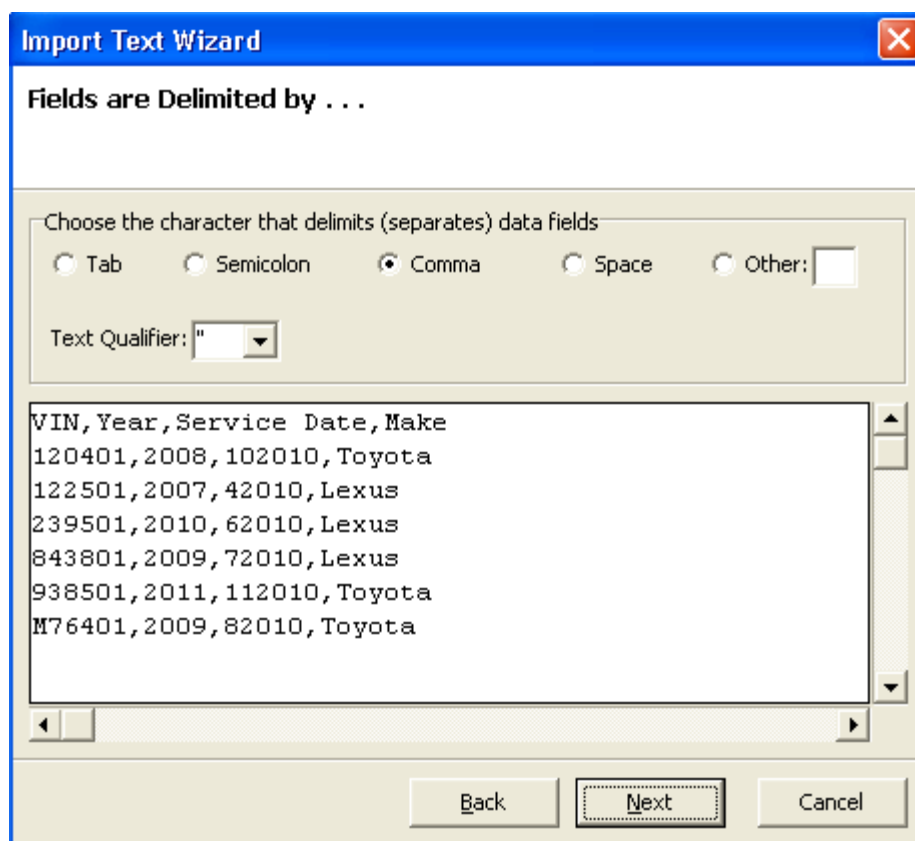


This screen is a live preview of the selected file contents.

This is an example of a delimited file format with comma field separators. Note that the first record contains field (column) names.

Clicking the Next button takes you to the Field Delimiters screen.

## Field Delimiters

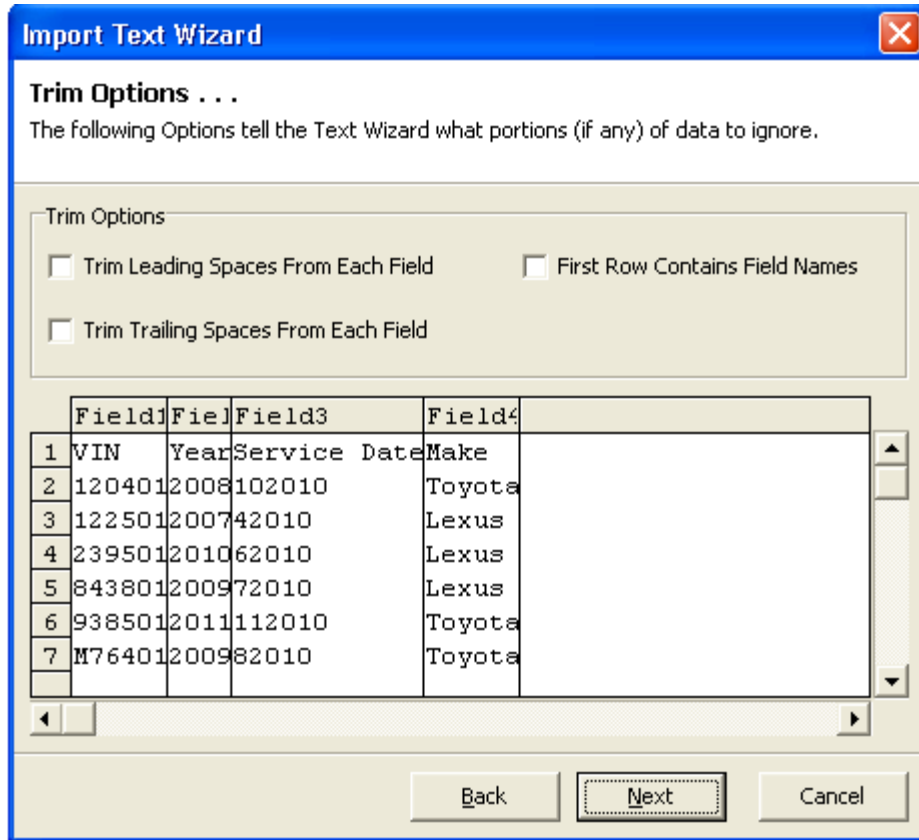


The "Fields are Delimited by..." screen is where you select the delimiter (field separator) and any text qualifier that may be used.

Excel will not put double-quotes around fields that do not have a comma in them. If a pipe (|) was used to delimit the fields, you would select the Other button and input that character.

Clicking the Next button takes you to the Trim Options screen.

## Trim Options

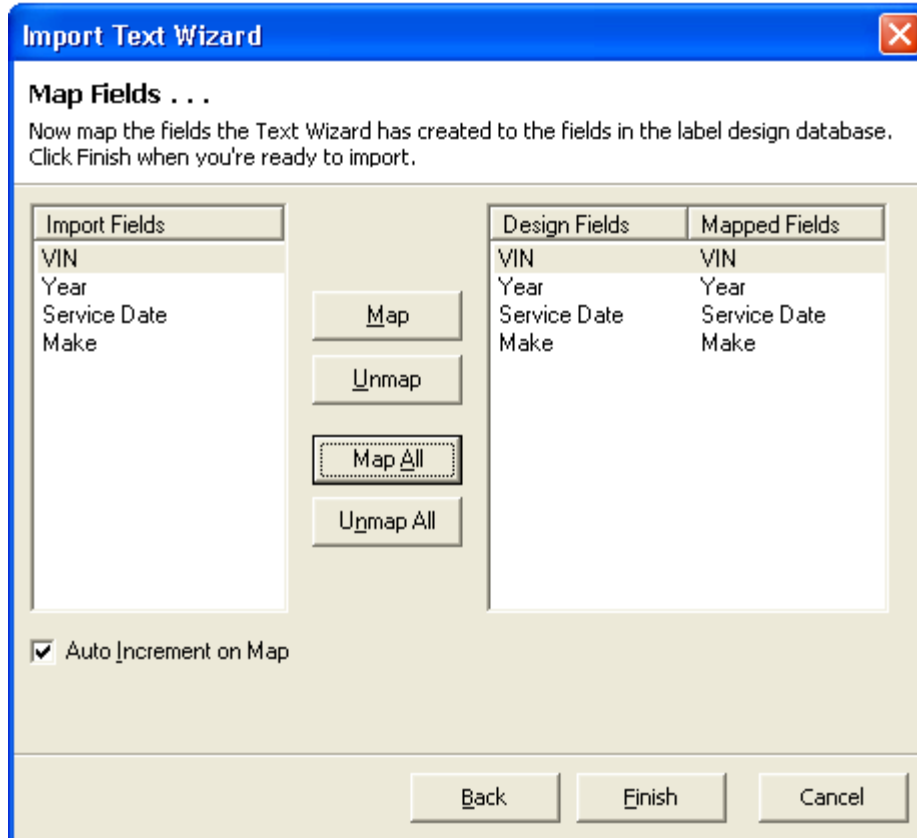


The Trim Options screen allows you to select an option to disregard the first row field names.

Trim Options allow for extra spaces before (leading spaces) or after (trailing spaces) the field data to be removed; and not to use the first record (row) if the first record contains field names that you do not want to print on the label. Always select the Trim Leading Spaces and Trim Trailing Spaces boxes. If your imported data contains header information, check First Row Contains Field Names box.

Clicking the Next button takes you to the Map Fields screen.

## Map Fields



Map the source data (Import Fields) on the left, to the target (Design Fields) on the right. It is important to know which Design Field corresponds to the Import Fields. Click on that Design Field and click Map.

When the source data format corresponds exactly to the label design data format, clicking Map All assigns the Import Fields straight across to the Design Fields.

If the Import Fields do not correspond directly to the field order of the Design Fields, select an Import Field by clicking on it.

*Auto Increment on Map* means the program will automatically select the next fields, in order, in the Import Fields column and the corresponding Design Fields column. For example, 1 to 1, 2 to 2, 3 to 3, etc.

If you uncheck the *Auto Increment on Map* box, you will need to individually select each Import Field, the correct Design Field, and click Map.

To import the data click Finish and you will return to the Enter Data screen showing your imported data.

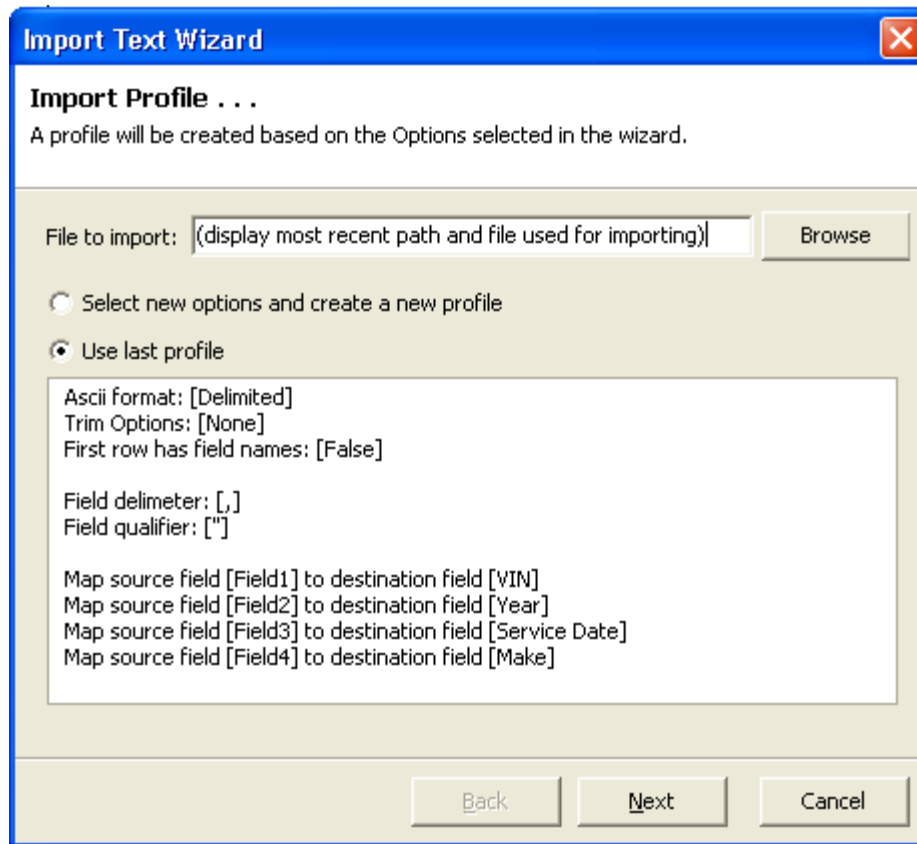
The screenshot shows the ColorFile Filing System interface. At the top, there is a navigation bar with links for HOME, PRINT LABELS, CONTACT US, and CORPORATE. Below this is a blue banner with the text 'COLORFILELABELS' and a link to 'Start here' for registered users. The main content area is titled 'SELECTED LABEL' and includes a breadcrumb link '< 6VinServiceJacket'. Below the title is a control panel with buttons for 'IMPORT DATA', 'EXPORT DATA', 'CLEAR DATA', 'DEFINE DATA', and 'GENERATE DATA'. There are also 'A\*' and 'A~' icons and buttons for 'PRINT PREVIEW' and 'PRINT ALL'. A table displays 'TOTAL RECORDS: 6' with columns for 'select', 'Rec #', 'VIN (17 max)', 'Year (4 max)', 'Service Date (10 max)', 'Make (15 max)', and 'delete'. The table contains 6 rows of data, each with a checkbox in the 'select' column and a 'delete' link. Below the table is a link to 'Add New Record'.

select	Rec #	VIN (17 max)	Year (4 max)	Service Date (10 max)	Make (15 max)	delete
<input type="checkbox"/>	1	120401	2008	102010	Toyota	<a href="#">delete</a>
<input type="checkbox"/>	2	122501	2007	42010	Lexus	<a href="#">delete</a>
<input type="checkbox"/>	3	239501	2010	62010	Lexus	<a href="#">delete</a>
<input type="checkbox"/>	4	843801	2009	72010	Lexus	<a href="#">delete</a>
<input type="checkbox"/>	5	938501	2011	112010	Toyota	<a href="#">delete</a>
<input type="checkbox"/>	6	M76401	2009	82010	Toyota	<a href="#">delete</a>

[Add New Record](#)

Data has been imported and ready to print. Next time you go to Import Data, the same options you selected to import this file will be available as a Profile.

## Profile Example



This is an example of a profile created after importing a data file.

The items in the square brackets [ ] are the options saved from the previous import session.

The profile is saved automatically and defaults to the Use last profile the next time you click Import Data on the Enter Data screen.

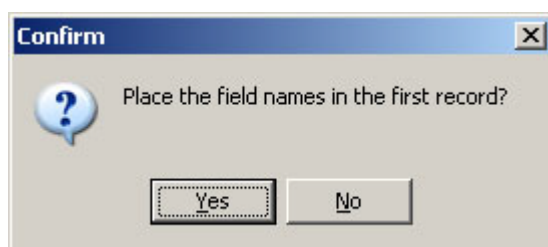
# Exporting Data

Exporting data from the data grid is a simple 3-Step process. All exported files are in a \*.csv format.

- On the Enter Data screen, click on the Export Data link above the data grid
- Browse to a location for saving the file, and type a file name
- Click OK after data is finished exporting

Always make sure any data you export is not subject to regulation. If it is, and you need to export the data, make sure the data is saved to an authorized location, and conforms to any and all of the regulations the data may be subject to.

This is the first dialog box you see after clicking Export Data.

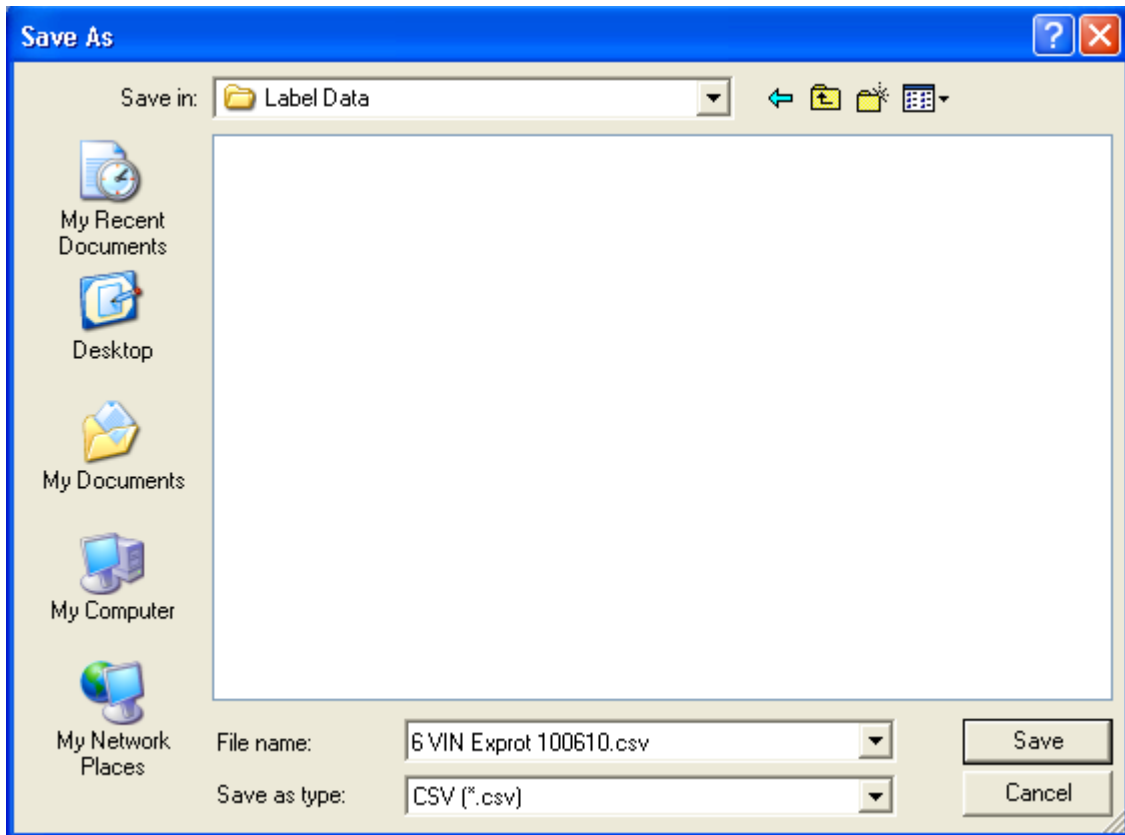


Below is an example of field names in the first record.

TOTAL RECORDS: 7						
<a href="#">select</a>	Rec #	VIN (17 max)	Year (4 max)	Service Date (10 max)	Make (15 max)	<a href="#">delete</a>
<input type="checkbox"/>	1	VIN	Year	Service Da	Make	<a href="#">delete</a>
<input type="checkbox"/>	2	120401	2009	102010	Toyota	<a href="#">delete</a>
<input type="checkbox"/>	3					<a href="#">delete</a>
<input type="checkbox"/>	4					<a href="#">delete</a>
<input type="checkbox"/>	5					<a href="#">delete</a>
<input type="checkbox"/>	6					<a href="#">delete</a>
<input type="checkbox"/>	7	M76401	2009	82010	Toyota	<a href="#">delete</a>

If you want field names in the first record, like in this example, click Yes to this option.





The Save As window is where you select a location and file name for the file.

Enter a name in the File name: field. [The Save as type is always CSV (\*.csv)]



If there were no errors exporting, the "Finished exporting data." dialog box appears. Click OK to return to the Enter Data screen.