CSV Creator for Metrix

For Flat Products

MONTESI
CONSULTING

Table of Contents

1   CSV Creator for Metrix

Why was It Created

The Metrix CSV Creator was designed to make it easy for people to enter flat product data information into Metrix. While the info can also be entered directly into Metrix there are more steps involved to achieve the same results. This allows you to quickly create a few products or jobs that can then be transferred into Metrix via a CSV file. CSV is a comma separated file that can be used to transfer data easily. This CSV file is compatible with Metrix as of version 3.0.1. There is no guarantee that this utility will work for previous or later versions. It is not sanctioned or supported by Lithotechnics. It is strictly a product of Montesi Consulting. If you have questions see the contact information at the end of this file.

Who Can Use The File?

The utility was created using Filemaker Pro 9, but it was also tested with Filemaker Pro 8. You will need to have Filemaker to use this utility. I am considering turning the utility into a standalone product, but it will be based on demand. If you need a standalone application... please let us know.

Passwords

The utility uses User Names and Passwords to prevent it from being modified. I have no desire to support a product that might have been modified by a user.

The Guest Account: This account has no password. You will have the ability to use the full functionality of the utility... but you will not be able to modify the functionality.

The Admin Account: This account allows you to modify the utility in any way. You can add customer lists, etc. This password is available for purchase for $25.00. If you don't feel comfortable editing the utility you can also contact us for any customization.

General Information

Certain items in the utility assume that values have already been entered into the Metrix database. These items are listed below:

Page Color Names
Product Group Names

If you don't normally use these items they are optional. If you do want to use them they can be manually entered or if you purchase the Admin password you can create a custom list to allow you to just choose them off of a drop down menu. This is shown with the pull-down menu for the grain direction.

Metrix also will check to see if it has a matching Company Name for each product entered.. If the Name you enter doesn't exist, Metrix will create the name in it's database. It will also do the same for Contact First and Family Names.

If you are using an Automated workflow with Rip Products like Rampage, you should be aware that this will not update the Rampage Company or Contact lists. They are independent lists and will need to be manually updated.

Units of measure in the utility are not defined at the current time. Any units of measure for trim sizes should be in whatever you have set in Metrix, either millimeters or inches.

The Content file is the name of the PDF content file... such as *Johns BC.pdf*. The utility just needs the name of the file, and NOT the path to the file. The path is added by Metrix. It is assumed by Metrix to be the General Content Folder. This folder is setup in the Metrix user preferences on the General tab. If you haven't changed the defaults setup by the program is will be something like the following: /Applications/LithoTechnics/Metrix 3.0/Content.

The Kinds field has special significance for Metrix. An individual job might have multiple kinds of a single product. As an example: You might have 3 kinds of business cards, or 2 kinds of postcard. If you only have 1 kind Metrix accepts the Name of Job and Content files exactly as you enter them. If you have more than one kind, Metrix functions differently. Metrix only recognizes single products... so an order with 5 products or kinds needs to be broken apart into the individual products. To do this Metrix will modify the entries in the CSV file from what you enter in the following ways: The Name of the job will be broken into multiple jobs with a letter added after each name. An example would be: Original - 34567 would be changed to 34567-A and 34567-B for a job with 2 Kinds. This will also be done for the entry of the content file. If you have 3 kinds... you would use a name like 34567.pdf in the utility. In Metrix... it will convert the entry into 34567-A.pdf, 34567-B.pdf and 34567-C.pdf. It will also look for individual content files with those names.

Each of the entries in the utility are self explanatory. If there are special conditions they are commented. The first 5 entries are not optional to each of the boxes has been tinted to flag the fields. All of the others are optional. In some cases the entries have default values already entered. If an entry is pre-loaded it is with the value that Metrix would assign if it were left blank.

Using the Utility

Add Records:
When the utility is launched for the first time it has no records. To start adding records click the Add Record Button or hit CMD-N. Then enter the info for each field in the record. Add records for each Job as needed. You can navigate between the records on the Filemaker Pro navigation bar to make further edits as needed.

Delete Records:
If you need to remove an individual record hit the Delete Record Button. It will delete the record you are currently viewing.

Delete All Records:
If you want to remove all records in the database hit the Clear All Records Button. This will remove all records and entries that you might have made. It will be like the program when you launched it the first time.

Exporting a CSV File:
When you have made all of the entries for a Project in Metrix you will need to output the proper .CSV file. To export the file... hit the Export CSV Button. This will bring up a dialog box to set the order of the fields... which you should leave as is. They are in the correct order by default. If you change the order it could have consequences in the Metrix database. It will then allow you to name the .CSV file. Give it whatever name you want.

Records in the Utility

There are 2 ways to use the utility. The first way is also the simplest. When the utility is launched... Delete All Records... then add and edit each record entry as needed. When you have completed your data entry... export the CSV for Metrix.

The second way is more complex but leaves you more options for reprints, etc. It involves never removing records from the database. When it is time to create the CSV file you can sort using File-Maker's tools to only export the records you need. An example would be to only export records with a name greater then 34567, or only output records 3.5 x 2 inches for a business card run.

As the utility is created in Filemaker you have a number of options available to you. If you find a unique way of doing something... please let us know as we might be able to document it or add the feature for other users.

Using the CSV file in Metrix

After you have launched Metrix, create a new Project. You can enter a Name, description and Notes as needed. Then hit finish. This will bring up a blank Metrix Project.

Once you have the blank project window, hit the button to Import Products. Navigate to the CSV file that you saved out of the Utility. Choose the file and then hit Import. Metrix will now convert the CSV file into products in the Project Explorer window. You can now assign the products to layouts as needed.

Contacting Us

There are a number of ways to contact us:

Mail:

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Purchasing the Unlocked Version

To purchase the unlocked version we charge $25.00.

Just contact us via one of the methods above.

Customizing the Utility

We can also custom edit the utility for individual customers. Call or e-mail us for a quote.