

WinSearch Import Utility

The WinSearch Import Utility takes a CSV file created by Excel or other programs and brings the data into WinSearch. Specifically, people and companies. People can be linked with companies already in the database or to the company created along with the person. For the sake of these examples, this assumes that you use Excel for data manipulation although other programs can certainly be used. The WinSearch Import Utility has a tremendous amount of flexibility so the exact entries are not cut and dry but depend upon the data that you import. The steps for using the utility are simple.

It is all about the prep work!

What is a CSV File

A CSV file, or comma separated values file contains different components separated by commas and often having text enclosed in parenthesis. It is a format frequently used by programs for doing imports and exports. An example is the following:

```
"First Name","Last Name","Company","Title",  
"John","Doe","ABC Company","Manager",  
"Susan","Smith","XYZ Company","Manager",
```

That same data, when opened in Excel (and widening columns), looks like this:

	A	B	C	D
1	First Name	Last Name	Company	Title
2	John	Doe	ABC Company	Manager
3	Susan	Smith	XYZ Company	Manager

Its strength is simplicity. Its weakness is that some programs do not handle multi-line entries.

Most CSV files open automatically in Excel when you double-click it.

Adding Appropriate Data Headings

To be able to bring the CSV file of data into WinSearch, you need to set up column headings. These tell the WinSearch Import Utility where to put the data in WinSearch. In the data shown above, column headings are entries like First Name, Last Name, etc. For the WinSearch Import Utility, the column headings must contain the entries that the WinSearch Import Utility understands for where the data is to be placed.

This part of the prep work becomes the most challenging because there are so many options that you pick and choose what you want. The exact choices depend upon the data you are importing.

As an example, suppose you start with the following:

	A	B	C	D
1	ABCDEF Association			
2	Membership Directory			
3	<u>First Name</u>	<u>Last Name</u>	<u>Company</u>	<u>Title</u>
4	John	Doe	ABC Company	Manager
5	Susan	Smith	XYZ Company	Manager

To import into WinSearch, the column headings need to change into this (formatting does **not** matter):

	A	B	C	D
1	<u>FirstName</u>	<u>LastName</u>	<u>Comname</u>	<u>Title</u>
2	John	Doe	ABC Company	Manager
3	Susan	Smith	XYZ Company	Manager

Overview

- ❖ Spelling matters in the column headings; capitalization doesn't; formatting doesn't. When you save the CSV file, formatting is dropped.
- ❖ Remove any introductory lines at the beginning. You can click on a row number, right-click it and choose **DELETE** to delete the entire row.
- ❖ If you have a lot of columns in your data, insert an empty row below the existing column headings and use that new row for the column headings you are setting up for the WinSearch Import Utility. When you have all the column headings specified, delete the extra row with the column headings that the WinSearch Import Utility does not use.
- ❖ Some column headings match what you see in the persons form (i.e. Status, Type, Class. Others may need some tweaking. To the side, you can see some of the more common equivalencies.
- ❖ Company entries start with COM and then follow the pattern for people entries.
- ❖ Email addresses start with EMAIL followed by any description. When more than one column has an email address, the order of the columns matter. The first email address for each person becomes their primary email address.
- ❖ Phone numbers start with PHONE followed by any description. When more than one column has a phone number, the order of the columns matter. The first phone number for each person becomes their primary phone number. If a person/company only has one phone number, that phone number will be the primary number. Otherwise, to make a phone number a primary phone number, put the word Primary Voice or Primary Fax after Phone as in Phone Primary Voice.
- ❖ If you want an entry repeated for both people and companies (i.e. Phone numbers), then you must repeat the column twice. The exception are the double-duty ones (COMNAME and the company address entries). To duplicate a column, click on the column letter in the border. Right-

click it and choose Copy. Click the column heading where you want the copy. Right-click it and choose Insert Copied Cells. Columns to the right are shifted over.

- ❖ Persons user defined field (UDF) entries are set with UDF and the UDF name as in UDFWebsite. For companies, it is COMUDF as in COMUDFWebsite. The UDF must be set up in WinSearch beforehand.
- ❖ Detail tables such as key words, imported documents, job history, education, and activities are not populated through this utility.
- ❖ Resume text must start with RESTEXT. Anything after RESTEXT becomes the document's description. This solely adds the text to a WSResume document. This utility does not add imported Word document. The Resume text is automatically processed for key words as the records are added to the database. The exception is if Process Key Words option is turned off with the **SETTINGS** →

WS Description	Column Heading
First Name	FIRSTNAME
Middle	MIDDLE
Last Name	LASTNAME
Honorific (Mr./Ms.)	HONORIFIC
Title	TITLE
Notes	NOTES
Company	COMNAME
RESTEXT	RESTEXT
User Defined Field	UDFDATA <i>UDFname</i>
Email	Email
Phone	Phone
Address (home)	ADDRESS_1
Address (home 2 nd line)	ADDRESS_2
City (home)	CITY
State (home)	STATE
Zip (home)	ZIP
Address (work)	COMADDRESS
Address (work 2 nd line)	COMADDRESS
City (work)	COMCITY
State (work)	COMSTATE
Zip (work)	COMZIP
Staff Rep	STAFF_REP

USER Options → **IMPORTED DOCUMENT SETTINGS** command.

- ❖ Related LOV tables are not populated. This means that if you set Persons Status to Hoovers List, the value is not added to the APPSTATUS table that WinSearch uses as the drop-down list for the Status entry for people. However, except for key words (described below), WinSearch does not verify that the entry matches existing entries. This means that WSImport potentially adds persons status codes that do not match entries in the Persons Status LOV table.
- ❖ COMNOTES and NOTES for notes for people and companies can either use one or more columns. If there is only one COMNOTES or NOTES column in the data file, then that entire entry becomes the company's or person's notes. However, if there are multiple COMNOTES or NOTES columns, then the text after the COMNOTES/NOTES entry is placed before the text in the column. As an example, suppose you have a data field like this:

Comname, Comnotes Year Established, Comnotes Primary Product
 "Adiva Corporation", "1997", "Professional Sound Equipment"

Then the company's notes will look like this:

Year Established: 1997
 Primary Product: Professional Sound Equipment

- ❖ Columns containing key words for companies or people contain COMKEY or PERKEY. Each persons or company key word must be in separate columns. This means that the data file may have multiple PERKEY or COMKEY columns. If you have multiple key word columns, number the COMKEY/PERKEY columns as in PERKEY1, PERKEY2, etc. The utility does not accept one column containing multiple key words.
- ❖ Column headings must be unique. This means if you have two phone number columns, they cannot both be solely labeled Phone. Instead, change them such as to Phone Main and Phone Direct.
- ❖ If date, number and phone number columns have entries that indicate where no value is provided, then remove those “no entry” entries. As an example, you can see a before and after approach to clearing out these types of “no entry” entries.

	G	H
1	Start_Sal	End_Sal
2	125417	85000
3	114231	100000
4	--	--
5	--	--
6	800000	936000

	G	H
1	Start_Sal	End_Sal
2	125417	85000
3	114231	100000
4		
5		
6	800000	936000

- ❖ Include Category and HomePrimary entries when you want to explicitly set the category entries and whether the home or work address is primary. As a reminder, Category is a number 1 through 6 to represents Contact (1), Perm Applicant (2), Contractor (3), Temporary (4), Employee (5) or Other (6), in that order. HomePrimary equals 1 to have the home address as the primary address and 0 otherwise. If you do not set the category entry, the category of the people added is the one set through the **SETTINGS → USER OPTIONS → PERSONS SETTINGS** command. HomePrimary, if not explicitly set, is set by the default category – 0 for Contact and Employee and 1 for all other categories.
- ❖ Companies created by processing people with this utility only pick up data from the row that is used to initially create the company. This means other entries for the company on other rows of data for other people are ignored.
- ❖ The WinSearch Import Utility uses some initial entries for people and companies when you don't include them in the data file. Then, the utility uses the same entries used when you create a person or company in WinSearch.

Adding Missing Entries

Often, there are some entries that you want as part of each person and/or company you are adding. It may be the source of the data, some key words or something as simple as a Status entry.

You just need to repeat the missing entries for each person/company you are adding.

- ❖ First, add the column headings and entries for the first person in the list as shown here:

	A	B	C	D	E	F	G
1	FirstName	LastName	Company	Title	Status	Category	HomePrimary
2	John	Doe	ABC Company	Manager	Active	1	0

- ❖ Highlight the data entries that you have added (E2 through G2 in this example) and copy them to the clipboard.
- ❖ Move to the cell below the first entry you just added (E3 in this case).

	A	B	C	D	E	F	G	H
1	FirstName	LastName	Company	Title	Status	Category	HomePrimary	
2	John	Doe	ABC Company	Manager	Active	1	0	
3	Susan	Smith	XYZ Company	Manager				

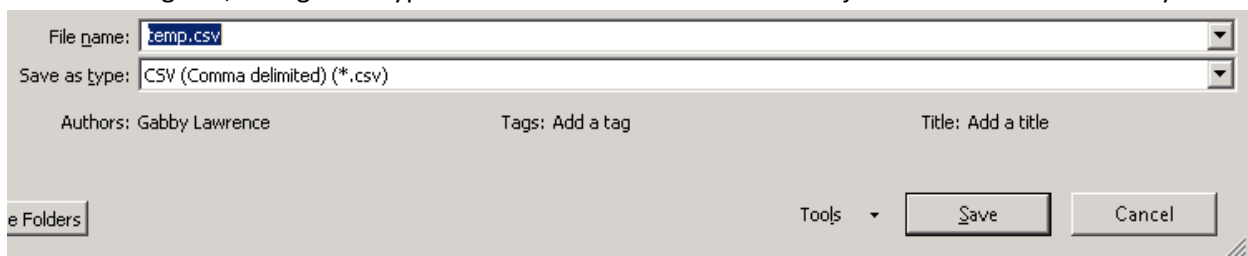
- ❖ Hold down the **(Shift)** key then press **(End)** then **(Home)**. This highlights from the current location to the lower right section of the usable portion of the spreadsheet.
- ❖ Paste the contents for all of the columns.

NOTE: Make sure that the last column that you use has an entry in every row!

Saving the CSV File

Now you are ready to save the data as a CSV file.

- ❖ Save the data from Excel in a CSV file with the **FILE → SAVE AS** command. At the bottom of the dialog box, change the Type to Comma Delimited and Excel adjusts the file extension for you.



- ❖ When prompted that the format does not support multiple worksheets, choose **OK**.
- ❖ When prompted that the spreadsheet contains features not compatible with CSV files, choose **Yes** to keep the chosen format.
- ❖ Close the worksheet and you are ready to import the file!

Starting the WinSearch Import Utility

You can start the WinSearch Import Utility with one of these methods:

- ❖ Double-click the desktop icon
- ❖ Find WSImport in the WinSearch folder then press Enter or double-click it.



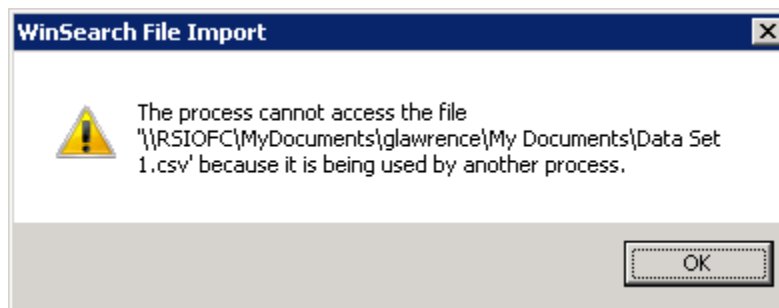
If you do not have the utility, contact technical support for this add-on.

Running WSImport

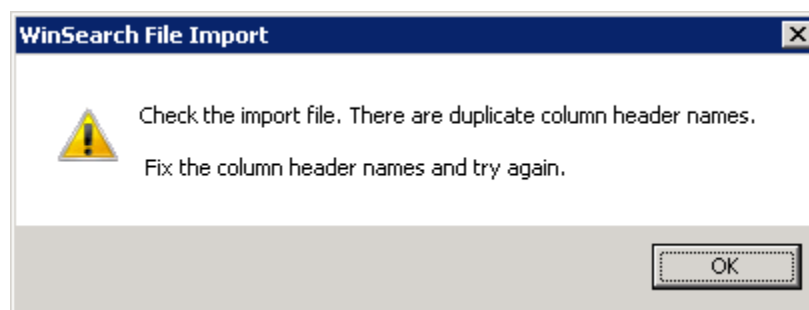
To actually import the data, it just takes picking the data file, responding to any messages then clicking the **Import** button.

The first step, however, is to click on the **Browse** button then pick the CSV file you previously created. The WinSearch Import utility reviews the column header entries to determine where the data goes.

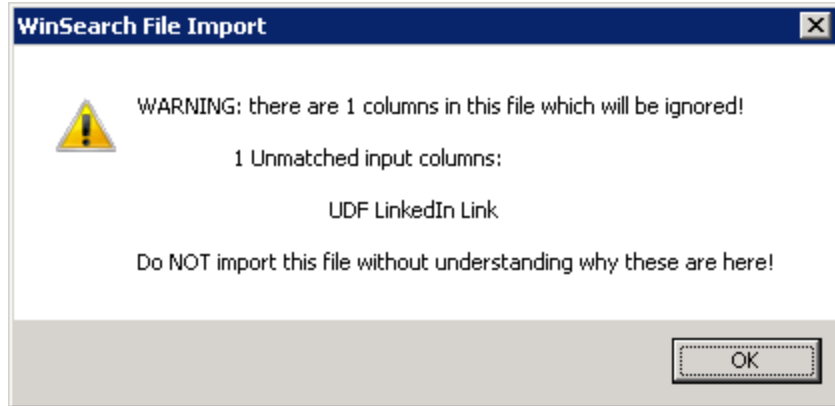
At this point, you might see one of three common messages indicating a problem. The first one is:



If you see this, the utility is letting you know that you still have the file open in Excel. Close it there then click the Open File button in the import utility. The second message that you might see is this one:

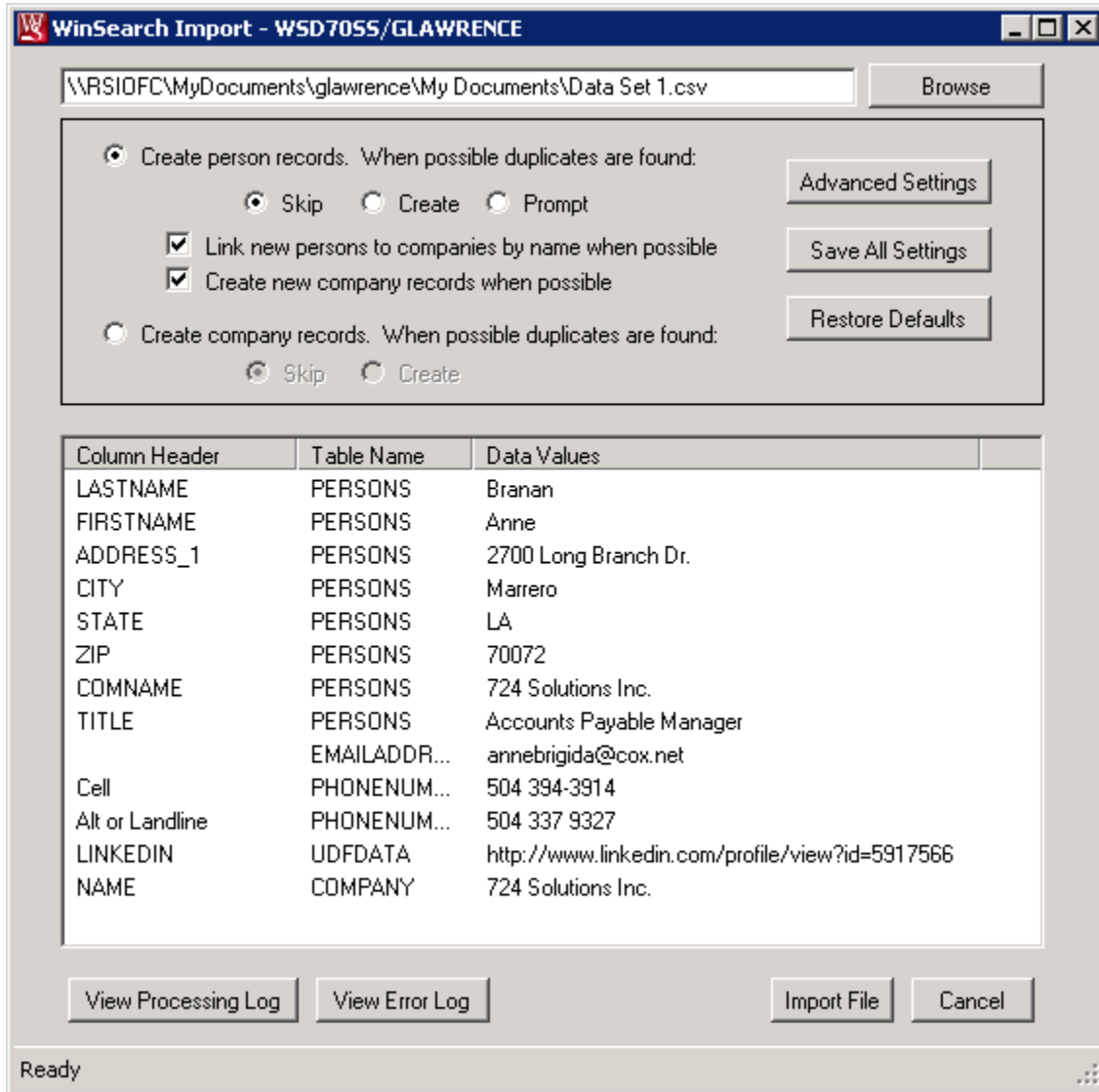


This message is letting you know that for the column headings, one of the columns is empty or one or more of the column headings is repeated. Remember that with entries like Phone, Email and Notes, when you have more than one column of these entries, you must have a description after Phone, Email or Notes to distinguish them. Once you choose OK, you can open the file in Excel, fix it, save the data file then click the **Open File** button. The third message that you might see is the following:

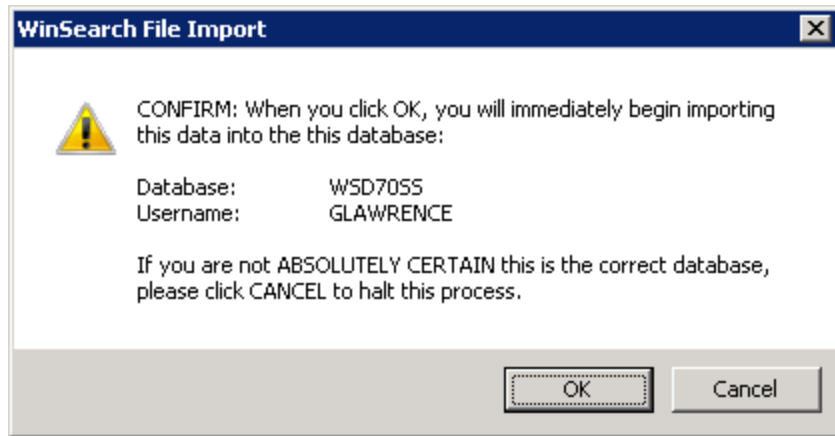


This message is indicating that one or more column headers cannot be identified for where the data is to be placed in WinSearch. Often this indicates a mistake such as putting Company for the company name rather than COMName. Or, as in this example, a UDF entry is identified but no UDF with that name exists in the database. Granted, if it is a column of data that you are intentionally skipping, then seeing this message is fine. If there is an error, you can open the file in Excel, fix it, save the data file then click Browse and re-select the file.

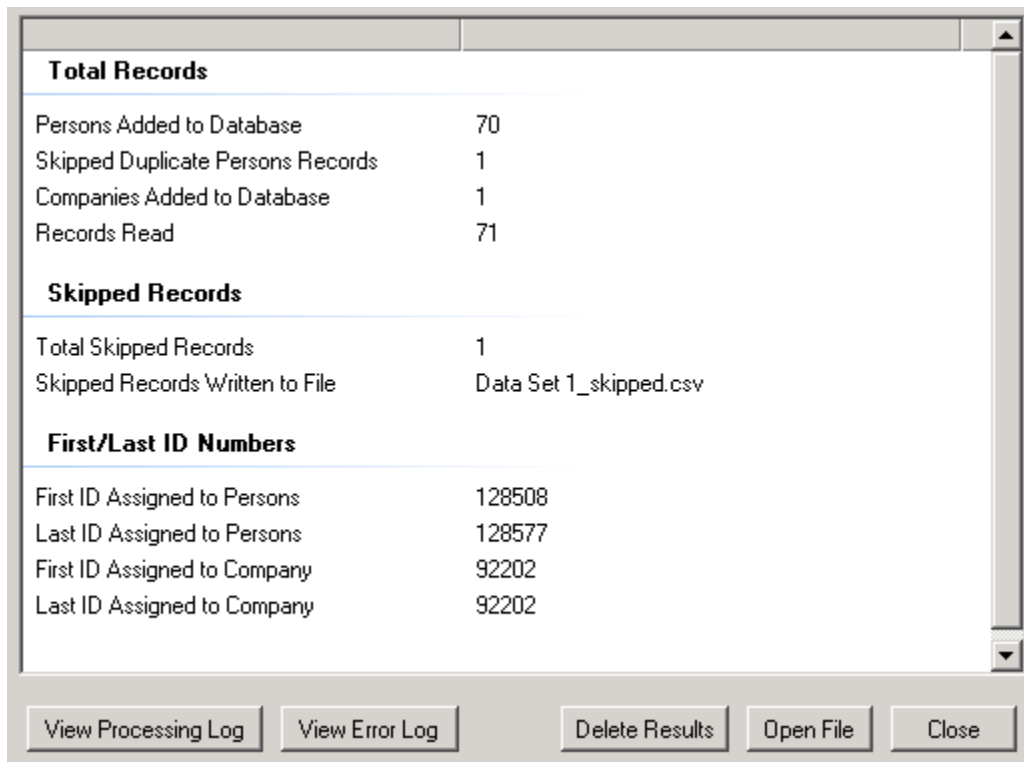
Once the utility identifies where the data should be placed per the column headers, you will see a summary for where the utility will place the data in WinSearch as shown next. Make sure that the destination for the data matches where you expect it to go.



If the locations for where the data file look good, you may want to glance at the options and then click **Import File**. You will see a confirmation prompt like the following.



Assuming that the staff rep entry and database are correct, choose Go. The Staff Rep that you are logged into can make a difference as initial settings for some entries can be set by user. Also, if the staff rep is not specified in the data file, the staff rep will be set to whom ever is logged in for completing the export. Now you see a summary for the import that has just been completed.

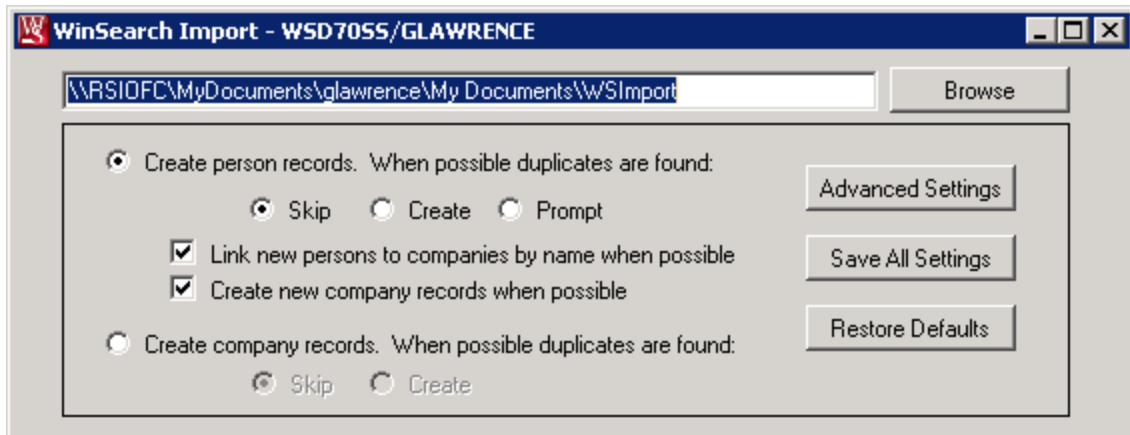


DO NOT CLOSE THE WINSEARCH IMPORT UTILITY AT THIS POINT!

If it passes a reasonability check, you are now ready to review your results in WinSearch.

WinSearch Import Utility Options

The WinSearch Import Utility has 2 sections of options that set how the import is done. One set of options is visible on the main WSImport window. The other options appear when you click the **Advanced Settings** button.



The options below the file with the data to import choose whether people and/or companies are imported. These options and their effects are:

- ❖ Create persons records – Choose this when people are to be created using the data in the chosen data file.
- ❖ (Persons) When possible duplicates are found– This chooses how the utility creates people that may be duplicates of ones in the database currently or added through this utility. Data from the data file that is not imported is written to a file with the same name and location as the original with `_Skipped` added to the filename.
- ❖ Link New Person to Companies By Name when possible – This tells the import utility to link people to existing companies in the database. It creates the link based on the company name.
- ❖ Create New Company Records When Possible – This tells the import utility to create new company records out of the imported data. When combined with the check box above, the only new companies created are those that do not match existing companies.
- ❖ Create Company Records – Choose this when **ONLY** companies are created from the data. This option means that persons records are **NOT** created.
- ❖ (Company) When possible duplicates are found – This chooses how the utility handles creating companies that may be duplicates of ones in the database currently or added through this utility. Data from the data file that is not imported is written to a file with the same name and location as the original with `_Skipped` added to the filename.

Import Settings [X]

Advanced Processing Options

When the input text is too long for the associated WinSearch Field: Skip Record Truncate Text Cancel Processing

When a non-numeric value is found in a numeric column/field: Skip Record Skip Field Cancel Processing

When an invalid date/time value is found in a date/time column/field: Skip Record Skip Field Cancel Processing

When a key word column's value is not in the Key Word Dictionary: Skip Record Skip Key Word Cancel Processing

When input rows are skipped write those rows to a "Skipped" file: Yes, create skipped file No, do not use

Input File Options

The fields in the input file are separated by the delimiter character: Comma Tab Character

When a delimiter character is used inside a field, the field is surrounded by: Double Quotes Single Quotes

The "escape" character inserting quote characters inside a quoted field: Chosen Quote Backslash

The "comment" character used in 1st position of the 1st field to ignore a row: Semicolon ";" Pound "#" Other:



Restore Defaults [OK] Cancel

These options decide whether to continue adding a person/company when there is a mistake in a data item for that person or company. The bottom half choices are where you can choose settings for how the CSV file is formatted.

Review Results in WinSearch

Once you have imported data with the WinSearch Import Utility, you want to review the results. You want to review the results in WinSearch before you close the WinSearch Import Utility. The reason is that if you made a mistake in where you are putting the data, you can easily undo the imports from WSImport. If you close WSImport, then you must do the deletions from within WinSearch which only allow 50 people or companies to be deleted at a time.

To find the data in WinSearch, you can do a Query By Example on create date.

- ❖ Select **PERSONS** → **PERSONS TABLE** from the main WinSearch window.
- ❖ Click the QBE toolbar button .
- ❖ Move to the Created column and put in today's date.
- ❖ Click the Execute Query toolbar button  a.k.a. Shazam!

Verify through reviewing several people in this list that your data is properly imported. If so, then you can close the WinSearch Import Utility window. If you discover that you overlooked something with the data that you brought over, then you can switch to the WinSearch Import Utility window and click the **Delete Results** button. After choosing **Yes** to the confirmation prompt, the data that you just imported is removed.

When the import is done, some people and/or companies may be skipped. The results window identifies how many were skipped because of duplicates and such. Also, see the data file that contain the people and/or companies that were skipped. That way, you can review the contents of the file to determine whether you want to import them and add potential duplicates or take some other course of action.

Total Records	
Persons Added to Database	70
Skipped Duplicate Persons Records	1
Companies Added to Database	1
Records Read	71

Skipped Records	
Total Skipped Records	1
Skipped Records Written to File	Data Set 1_skipped.csv

More Information on the Import

Two buttons in the WinSearch Import Utility can provide more information on the import. Clicking them opens other windows with further detail on the import.

The **View Processing Log** button opens a window that reports the summary and detail on the import. The file has a record of the options chosen for the import, the summary of what was imported. Additionally, there are line-by-line breakdowns on what is imported. Thus, you can see which ones were skipped and why they were skipped.

The **View Error Log** button opens a window with error messages that need addressing. This window will seldom have information here since most of the usage information is in the Processing Log.