# **Tapit NOVA Call Accounting** Import Utility Manual







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160901	New Template

### **Tapit NOVA Import Utility Manual**

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### Minimum System Requirements

- Pentium<sup>™</sup> II Based PC
- 128 MB RAM
- Microsoft<sup>™</sup> Windows 98/NT/2000/XP Professional
- 250 MB Free Disk Space
- Read/Write Access to the Tapit Database
- Read/Write Access to the to-be-imported CSV File
- Tapit NOVA has to be installed on the same PC



### **Before Importing Data**

- Tapit Import Wizard accepts files in a CSV (comma delimited) format. Use export facilities provided by the application you are importing from to create a CSV file.
- Importing Clients, Users and Departments from CSV files into TAPIT NOVA is a two-step process:

**STEP 1** – CSV file has to be converted into "Import Ready Data" using the TAPIT Import application.

**STEP 2** – "Import Ready Data" has to be transferred into TAPIT NOVA using Upgrade Tapit task available within TAPIT NOVA application.

• IMPORTANT: If you have Remote Manager, and you want to import data for more than one location, you need to repeat import process for each location.

Import process has two steps. First step is getting data from CSV files Import Ready using Tapit Import. Second step is running Upgrade Tapit task in TAPIT NOVA. Both steps have to be completed for one location at time.

• Before import, validate your data using guidelines below.

### **Overview of Import Process**

- 1. Validate data in CSV files using guidelines from Validating Data sections specific for each Import type (Client, User, and Department).
- 2. Install Tapit Import application.
- 3. Proceed with importing all desired data for the same location.
- 4. Run Upgrade TAPIT Task within TAPIT NOVA application.
- 5. Repeat points 3 and 4 for each TAPIT location you are importing data.



### Installation

### Installing Tapit Import

### Tapit Import has to be installed on the same PC Tapit NOVA is installed.

- 1. To start Tapit Import installation, double click on Setup.exe
- 2. Tapit Import Setup screen appears.

apit Import Setup	×
Welcome to the Tapit Import installation program.	]
Setup cannot install system files or update shared files if they are in use. Before proceeding, we recommend that you close any applications you may be running.	
OK E <u>x</u> it Setup	]
	apit Import Setup         Import Setup         Welcome to the Tapit Import installation program.         Setup cannot install system files or update shared files if they are in use.         Before proceeding, we recommend that you close any applications you may be running.         OK         Exit Setup

- 3. Click on **OK.**
- 4. Click on the installation icon/button to install Tapit Import.

🛃 Tapit Import Setup	×
Begin the installation by clicking the button below.	
Click this button to install Tapit Impor directory.	t software to the specified destination
Directory:	1
C:\Program Files\Tapit Import\	Change Directory
Exit Setup	



5. The **Choose Program Group** screen is displayed. Click on **Continue** to accept default option. Tapit Import will install in Tapit program group.

🖶 Tapit Import - Choose Program Group	×
Setup will add items to the group shown in the Program Group box. You can enter a new group name or select one from the Existing Groups list.	
Program Group:	
Tapit	
Existing Groups:	
Accessories ASP to ASP.NET Migration Assistant Dell Accessories EARN HTML Help Workshop Lavasoft Ad-aware 6 Microsoft Web Publishing Power Scan Startup Tapit	
Cancel	

6. Wait until setup program is done with file installation.



7. Click on **OK** to the confirmation message.

Tapit Import Se	etup	×
Tapit Import Se	tup was comple	ted successfully.
	ОК	

8. Proceed with the section below.



### Step 1 - Convert CSV Files to Import Ready Data

IMPORTANT: If you have Remote Manager, and want to import data for more than one location, repeat the import process for each location. There are two steps. The first step is getting data from CSV files Import Ready using Tapit Import. The second step is running Upgrade Tapit task in Tapit NOVA. Both steps have to be completed for one location at time.

### CLIENT

### **Glossary of Terms**

**TEXT field** – the field in CSV file that needs to be imported to TAPIT. **TAPIT field** – the field in TAPIT Database, into which TEXT field is imported. **TEXT record** – a record (a line) in CSV file. This record is imported to TAPIT Database to either Client or User table.

**TAPIT record –** a record in TAPIT Database. A record from CSV file (TEXT record) is imported to either Client or User table in TAPIT Database. Once in TAPIT Database, it becomes TAPIT record.

### Validating Data

### Tapit Import matches TEXT records with TAPIT records – one to one

One TEXT record (one line in the CSV file) corresponds to one TAPIT record. Each Client/User has only one record in the CSV file. That record may contain, in Client case, **multiple phone numbers.** 

Same Client record from CSV file:

"Hanover Florist","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358"

Each comma-delimited value is a **TEXT field** i.e. Hanover Florist is one of the TEXT fields.

You would match the above fields to be imported the following way:

TEXT field	Tapit field
Smith	Client Last Name
John	Client First Name
Hanover Florist	Client Company Name
215 Ridgedale Ave	Client Business Address 1
Florham Park	Client City
NJ	Client State
(973) 360-2300	Client Phone Number
973-360-2222	Client Phone Number
99355	Client Account Code



**TAPIT Client fields available for Import:** 

TAPIT Client Id field is not available for import from the CSV file. Instead TAPIT assigns a new Client Id to each imported record.

Each Client TAPIT field can be associated with only one TEXT field except Client Phone Number.

Client records can have more than one phone numbers, thus Client Phone Number can be matched with multiple TEXT fields, provided the phone numbers are within Client TEXT records (are listed on the same line in CSV text file).

**Client Last Name** – is a required field.

Client First Name

**Client Company Name** 

Client Business Address 1

Client Business Address 2

Client City

**Client State** 

Client Zip Code

**Client Phone Number** 

Client can have multiple phone numbers – multiple TEXT fields can be associated with the TAPIT Client Phone Number filed. All phone numbers have to be listed within the same TEXT record as shown below.

For Example:

Sample Client record from CSV file:

"Hanover Florist","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358"

Each comma-delimited value is a **TEXT field** i.e. Hanover Florist is one of the TEXT fields.

You would match the above fields to be imported the following way:

TEXT field	Tapit field
Smith	Client Last Name
John	Client First Name
Hanover Florist	Client Company Name
215 Ridgedale Ave	Client Business Address 1
Florham Park	Client City
NJ	Client State
(973) 360-2300	Client Phone Number
973-360-2222	Client Phone Number
99355	Client Account Code



Phone Number can contain digits, parenthesis (), dashes - and spaces. No other characters are accepted. If other characters are found the entire Client record associated with this Phone Number is rejected.

973-360-2300 - valid format

(973) 360-2300 - valid format

973.360.2300 - invalid format

1-800-Pick UPS – invalid format

973.360.2300 ext 103 - invalid format

Phone Number cannot be less than 10 digits and more than 24 digits. Phone Number cannot be duplicated in the TAPIT Database. If Phone Number already exists in the TAPIT Database, the entire Client record associated with this Phone Number is rejected.

### For example:

There is a client in TAPIT with the Phone Number "(973 360-2300". The attempt to import record: "Hanover Florist","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358" is unsuccessful because it would duplicate the phone number - "(973 360-2300".

If a phone number is duplicated within the CSV file, the record with the first instance of this phone number is saved in TAPIT Database. All subsequent records containing the same phone number are rejected.

For example:

First record:

"Hanover Florist","440 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2133","02358" - this record is saved.

Second record:

"Trisys, Inc.","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358" this record is rejected because it would duplicate the phone number - "(973) 360-2300".



### Client Account Code

Client can have only one Account Code.

Account Code field accepts digits and letters. No other characters are accepted. If characters, other than digits and letters, are found the entire Client record associated with this Account Code is rejected.

99358 – valid format

UPSCOM – valid format

99\*\*#8 – invalid format

Account Code cannot be more than 16 digits/letters.

Account Code cannot be duplicated in TAPIT. If an Account Code exists in TAPIT Database already the entire record associated with this Account Code is rejected.

For example:

There is a client in TAPIT with the Account Code "99358". In this case the attempt to import record: "Hanover Florist","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","99358" will be unsuccessful because it would duplicate the Account Code – "99358".

If an Account Code is duplicated within the CSV file the first record read is saved in TAPIT Database. All subsequent records, containing the same Account Code, are rejected.

For example:

Two records have the same Account Code – 99358.

The record for Hanover Florist is read first.

"Hanover Florist","440 Ridgedale Ave","Florham Park","NJ","(973) 360-2111","973-360-2133"," **99358**"

The Hanover Florist record is saved.

The record for Trisys, Inc. is read second.

"Trisys, Inc.","215 Ridgedale Ave","Florham Park","NJ","(973) 360-2300","973-360-2222","**99358**"

At this time TAPIT Database already contains Account Code 99358 associated with the Hanover Florist Client. Thus, Trisys, Inc. record is rejected because it would duplicate the Account Code –"99358".



### Using Import Wizard – Client

Tapit Import Wizard will load data from the CSV files to access database in format ready for the Upgrade TAPIT task.

1. Start Import Wizard by clicking on **START/TAPIT NOVA/TAPIT Import**. TAPIT User/Client Import screen appears.

TAPIT User/Client Import Welcome to the TAPIT User/Client Import Wizard This utility program guides you through client/user data import. Data can be imported from a comma delimited (CSV) file. TAPIT Client/User Id fields are not available for import from the CSV file. Instead TAPIT assigns a new User Id to each imported record. User Instructions Examples of CSV Files Click on Next >>' to Continue.	🐂 TAPIT Import Wizard 1.1.0		- O ×
CLIENTS       User Instructions         Examples of CSV Files         Click on 'Next >>' to Continue.	TAPIT Import Wizard 1.1.0 TAPIT User/Client TAPIT IMPORT USERS	Welcome to the TAPIT User/Client Import Wizard This utility program guides you through client/user data import. Data can be imported from a comma delimited (CSV) file. TAPIT Client/User Id fields are not available for import from the CSV file. Instead TAPIT assigns a new User Id to each imported record.	
		Instead TAPIT assigns a new User Id to each imported record. User Instructions Examples of CSV Files Click on 'Next >>' to Continue.	

2. Click on Next.

Select **Destination Table** screen displays.



Click on **Client** option to check it.



### 3. Click on **Next**.

**Locate Files** screen opens. Enter the Path to the CSV file, or click on the **Browse** button to find it.

Import CLIENTS from CSV File:	
Enter the path to the csv file or click on 'Browse' to find it.	
C:\CVSfiles\Client.CSV	Browse

Enter the Path to the TAPIT Database, or click on the **Browse** button to find it.

Import TO TAPIT Database (tapitdb.mdb) File:	
Enter the path to the TAPIT database (tapitdb.mdb) file or click on 'Browse' to	o find it.
C:\TapitW32\Tapitdb.mdb	Browse

### 4. Click on Next.

Column Headers screen comes up.

Column	Headers	CLIENTS IMPOR	at a state of the		
Examples of ( View s	CSV files ample CSV file for Cli	ent import			
Does the first	t row contain header? Sample	e Text File Data (max 10)	) records shown)		
First Name	Last Name	Company	Account Code	Street	City
Samuel	Jones	Plastic & Wood, Inc.	13456	1386 Sycamore Lane	Mario
Simon	Gabriel	General Telecom, Inc	12345	235 Hellna Rd	Bayor
Kathy	Clark	Comaid	58925		
Henry	Goldstain	Tristate Co.	89651	1464 Hampton Dr.	Jerse
Nancy	Davey	1 Nation Technology	50983	235 Shelton Str	Thorr
Teresa	Litak	Trisys Telecom, Inc		135 Sill Drive	Hally
Anna	Chua	Tristate Co.		1464 Hampton Dr.	Jerse,
Agnes	Litak	Trisys Telecom		215 Ridgedale Ave	Florha
1					Þ
	uncal	cc Back	Next	Finich	



### Does the first row contain headers?

Check this option if the first line of your CSV files contains TEXT field names.

Does the first row contain header?

5. The **Sample Text File Date** is displayed on your screen. Only the first 100 lines of your CSV file are displayed. Please check if the CSV data is separated into columns properly.

First Name	Last Name	Company	Account Code	Street	City
Samuel	Jones	Plastic & Wood, Inc.	13456	1386 Sycamore Lane	Mari
Simon	Gabriel	General Telecom, Inc	12345	235 Hellna Rd	Baye
Kathy	Clark	Comaid	58925		
Henry	Goldstain	Tristate Co.	89651	1464 Hampton Dr.	Jers
Nancy	Davey	1 Nation Technology	50983	235 Shelton Str	Tho
Teresa	Litak	Trisys Telecom, Inc		135 Sill Drive	Hally
Anna	Chua	Tristate Co.		1464 Hampton Dr.	Jers
Agnes	Litak	Trisys Telecom		215 Ridgedale Ave	Flork

ay 100 wacawda cha

### 6. Click on **Next**.

The Match Fields screen appears.

This screen lets you match TAPIT fields with the corresponding TEXT fields.

Match Fie	lds				
	, <u> </u>	C	LIENTS IMPORT		
Records to IMPORT:		Sample Text Fil	e Data (max 100 recor	ds shown)	
9	Field 0	Field 1	Field 2	Field 3	Field ▲
_	First Name	Last Name	Company	Account Code	Stree
	Samuel	Jones	Plastic & Wood, Inc.		13456
STEP 1	Simon	Gabriel	General Telecom, Inc		12345
Select an item from	Kathu,	Clark	Comaid		58925 🚬
'Text File Columns'	•				•
list and a					
corresponding field name from 'Tapit	Tanit (	atabase Fields	Match Fields	Covt File Columns	
Database Fields' list.	Tapic	atabase Fielas		Text File Columns	
CTED 2					
STEP 2		Add matched (		A 12-04	
Llick on the Add		Add matched f	leids to the Impo	t list	
to save this					
selection for Import					
Beneat stens 1 2					
until all fields are					
matched.					
Each Tapit Field,					
except Phone					
Number can be					
matched with ONLY					
one Text File					
Column.					
Phone Number Field					
can be matched with					
can be matched with multiple Text File					
can be matched with multiple Text File Columns.		Remove ite	m from the Impo	rt list	
can be matched with multiple Text File Columns.		Remove ite	em from the Impo	rt list	



7. **Sample Text File Data** on the top of the screen displays up to 100 records of the CSV TEXT file data.

The top row consists of the names of the TEXT file columns. These names are listed in the **Text File Columns** list box. Sample Data is provided as a reference in field matching. You can check what data each column contains.

8. Select a TAPIT field from **TAPIT Database Fields** list box and then a corresponding item from **Test File Columns**.

Tapit Database Fields	Match Fields	Text File Columns	
Client Account Code	💌 💳 🗛 Account Code	1	•

9. Click on Add matched fields to the Import List.

The matched fields appear on the Import List.

Repeat steps 9 and 10 until you're done with matching fields.

Client First Name	=	First Name
Client Last Name	=	Last Name
Client Company Name	=	Company
Client Business Address 1	=	Street
Client City	=	City
Client State	=	State
Client Zip Code	=	Zip
Client Phone Number	=	Phone 1
Client Phone Number	=	Phone 2
Client Account Code	=	Account Code

### WHEN MATCHING CLIENT FIELDS

**Client Last Name** has to be imported.

TAPIT **Client Phone Number** is the only field that can be matched with multiple TEXT fields (columns). Client can have multiple phone numbers.

All other TAPIT fields can be matched each with only one TEXT field (column).



10. When all fields are matched, click on **Next**.

### The **Import Screen** appears.

This screen displays the final field selection for import.

Import			
CLIENTS IMPORT			
MPORT	Tapit Database Fields	IMPORT	TLIST Text File Columns
mport Wizard imports	Client First Name	=	First Name
matched in the Import	Client Last Name	=	Last Name
List.	Client Company Name	=	Company
	Client Business Address 1	=	Street
Jata from the Text	Client City	-	City
mported to the	Client State	=	State
corresponding Tapit	Client Zip Code	-	Zip
ields.	Client Phone Number	=	Phone 1
6 I. B	Client Phone Number	-	Phone 2
be IMPORT LIST	Client Account Code	-	Account Code
he 'Match Fields' creen. Add/remove he Import List items. FO IMPORT NOW lick on the 'Finish' button.			

### 11. Import Wizard imports data the way it is matched in the **Import List**.

Tapit Database Fields	PORT	LIST Text File Columns
Client First Name	=	First Name
Client Last Name	=	Last Name
Client Company Name	=	Company
Client Business Address 1	=	Street
Client City	=	City
Client State	=	State
Client Zip Code	=	Zip
Client Phone Number	=	Phone 1
Client Phone Number	=	Phone 2
Client Account Code	=	Account Code

If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen.

Add or Remove rows from the Import List.

Otherwise, click on **Finish** to import.



12. When import is completed, a confirmation message appears.



TAPIT Import Wizard 1.1.0		_ 🗆 ×
Import		
	CLIENTS IMPORT	
Total text (csv) records: 8	Total records imported to 'Client' table: 7 Total records rejected: 1	
Import Log File Click on the 'View Import Log File' button to view this file in the Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	View Log Information - File: 030205200609_Log.log View Import LOG File 030205200609_Log.log file is located in: C:\Program Files\Tapit Import\LogFiles\ folder. View Rejected Records - File: 030205200609_Rejected.csv	
Rejected Records File Click on the View Rejected Records CSV File' button to view this file in the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV format. The Import Log file contains	View Rejected Records CSV File 030205200609_Rejected.csv file is located in: C:\Program Files\Tapit Import\LogFiles\ folder.	
descriptions of errors associated with each rejected record. You can import rejected records again after you revise the Rejected Records CSV file. Please click on 'How to revise Rejected Records file' button for instructions.	How to REVISE Rejected Records CSV file Import REVISED Rejected Records File: 030205200609_Log.csv Import REVISED Rejected Records CSV File	

Top of the Import screen displays Import statistics.

Following example below – the CSV file contained 8 total TEXT records, 7 TEXT records were successfully saved (imported) into the TAPIT Database. 1 TEXT record was rejected (was not imported).

Total text (csv) records: 8	Total records imported to 'Client' table: 7	Total records rejected: 1	



14. To find out more about rejected records click the **View Import Log File** button.

-View Log Information - File: 030205200609\_Log.log



The log file contains information about import.

Import FROM CSV file C:\CVSfiles\Client.CSV Import TO the C:\TAPITW32\TAPITdb.mdb database, Client table FIELDS ARE MATCHED THE FOLLOWING WAY: Client Name = First & Last Name (Field0 & " & Field 1 ClientFirstName) Client Company Name = Company (Field2 ClientLastName) Client Business Address 1 = Street (Field4 ClientBAddress1) Client City = City (Field5 ClientBCity) Client State = State (Field6 ClientBState) Client Zip Code = Sip (Field7 ClientBZip) Client Phone Number = Phone 1 (Field8 CPNPhoneNumber) Client Phone Number = Phone 2 (Field9 CPNPhoneNumber) Client Account Code = Account Code (Field3 ClientAccountCode) (why records were rejected rec # matches the record number in a rejected file csv) \*\*\*Rejected rec # 1\*\*\*Phone Number: "9735654565" already exists in database

\*\*\*Rejected rec # 1\*\*\*Phone Number: "9735654565" already exists in database and has not been saved in TAPIT

### (Import statistics)

Import to the Client table from file C:\CVSfiles\Client.CSV is completed 8 total CSV file records.

- 7 imported records.
- 1 rejected records.

15. To view rejected records click on the **View Rejected Records CSV File** button.

View Rejected Records - File: 030205200609\_Rejected.csv -

View Rejected Records CSV File

030205200609\_Rejected.csv file is located in: C:\Program Files\Tapit Import\LogFiles\ folder.



X

16. The following screen opens up. Click on View File.

To Revise the Rejected Records file:

#### STEP 1

Click on the 'Instructions' button. The 'Instructions.txt' file contains guidelines on how to correct the Rejected Records file.

### STEP 2

Click on the 'View File' button to open the rejected records file. Follow the guidelines from 'Instructions.txt' file and revise this file.

Cancel	View Instructions	View File

The Rejected Records csv file opens in Notepad. The below is the Rejected Records file produced by our example import (how it is displayed in Notepad). The entries marked bold in this manual are the entries to be corrected – the log file above has a list of these entries and information on what needs to be corrected.

The first row of our rejected file is the headers. The Rejected Records file headers reflect headers used originally in our CSV import file. The headers must be left unchanged.

"Rec Number", "Company", "First Name AND Last Name", "Street", "City", "State", "Zip", "Account Code", "Phone 1", "Phone 2" *(end of headers)* "1", "Tristate Co.", "Anna Chua", "1464 Hampton Dr.", "Jersey City", "NJ", "7978", "", "(201) 458-7245", **"(973) 565-4565"** *(end of line 1)* 

The same Rejected Records file after corrections:

"Rec Number", "Company", "First Name AND Last Name", "Street", "City", "State", "Zip", "Account Code", "Phone 1", "Phone 2"*(end of headers – did not change anything here)* 

"1", "Tristate Co.", "Anna Chua", "1464 Hampton Dr.", "Jersey City", "NJ", "7978", "", "(201) 458-7245", **"(973) 230-4489" (***end of line 1 - revised***)** 

# <u>The Rejected Records file needs to be saved in Notepad under the same</u> <u>name</u>.

17. Now you can import rejected records again by clicking on **Import Revised Rejected Records CSV File**.

Import REVISED Rejected Records CSV File



18. If you have corrected the Rejected Records file and saved it under the same name (overwritten) then click on **OK** to continue.

Tapit Import
This action will IMPORT C:\Program Files\Tapit Import\LogFiles\030205200609_Rejected.csv file to TAPIT. If you have revised_030205200609_Rejected file and saved changes under the same name and path (C:\Program Files\Tapit Import\LogFiles\030205200609_Rejected.csv) then click on OK.
Otherwise click on CANCEL and open the file for correction using the 'View Rejected CSV File' button.

19. TAPIT Import Wizard will import records from the Rejected Records file. When import is finished it will display the following message:

when import is misrica it will also ally the following
Tapit Import 🔀
Import Completed. Please see Import.Log for more information.
OK
Click on <b>OK</b> .

- 20. The Import screen changes to reflect the new import results (import from Rejected Records csv file).

In our example:

"Total text (csv) records: 1" – total number of text records in the Rejected Records csv file.

"Total records imported to 'Client' table:1" – the number of text records from the Rejected Records csv file imported to TAPIT.

"Total records rejected: 0" – the number of rejected records. This number should be 0 if all of the problems have been corrected in the Rejected Records csv file.



TAPIT Import Wizard 1.1.0		
Import	1	
	CLIENTS IMPORT	
Total text (csv) records: 1	Total records imported to 'Client' table: 1	Total records rejected: 0
Import Log File Click on the "View Import Log File' button to view this file in the Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	View Log Information - File: 030205200609_ View Import LO 030205200609_Log.log file is located in: C:\Program Files\Tapit Import\LogFiles\ folder. There are no rejected records - the csy file	Log.log G File
Rejected Records File Click on the 'View Rejected Records CSV File' button to view this file in the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV format. The Import Log file contains descriptions of errors associated with each rejected record. You can import rejected records again after you revise the Rejected Records CSV file. Please click on 'How to revise Rejected Records file' button for instructions.	View Rejected Record	ds CSV File
Cancel	<< Back Next >>	Finish

Client data is ready to be imported to TAPIT NOVA.



### USER

### **Glossary of Terms**

TEXT field – the field in CSV file that needs to be imported to TAPIT.
TAPIT field – the field in TAPIT Database, into which TEXT field is imported.
TEXT record – a record in CSV file. This record is imported to TAPIT Database to either Client or User table.

**TAPIT record –** a record in TAPIT Database. A record from CSV file (TEXT record) is imported to either Client or User table in TAPIT Database. Once in TAPIT Database, it becomes TAPIT record.

### **TAPIT User Fields Available for Import**

TAPIT User ID field is not available for import from the CSV file. Instead TAPIT assigns a new User Id to each imported record.

TAPIT Import does not import any information concerning Departments. Departments have to be manually created and assigned to Users via TAPIT application, when import is completed.

Each User TAPIT field can be associated with only one TEXT field except User Extension. User records can have more than one extension, thus User Extension can be matched with multiple TEXT fields.

User First Name

User Last Name

User Last Name is a required filed in TAPIT. If it is empty the entire User TEXT record is not saved into the TAPIT Database

User Authorization Code

There can be only one Authorization Code per User

TAPIT Authorization Code field accepts digits and letters. If characters, other than digits and letters, are found the entire User record associated with this Authorization Code is rejected.

99358- valid format.

UPSCOM – valid format.

99\*\*#8 – invalid format.

Authorization Code cannot be more than 16 digits/letters.

Authorization Code cannot be duplicated in TAPIT Database. If an

Authorization Code already exists in TAPIT Database the entire record associated with this Authorization Code is rejected.



### For example:

There is a USER in TAPIT with the Authorization Code "8858". In this case the attempt to import record:

"Mark","Brown","**8858**",".05",".10","","125","118"123" will be unsuccessful because it would duplicate the Account Code –" 8858".

If an Authorization Code is duplicated within the CSV file the record with the first instance of this Authorization Code is saved in TAPIT Database. All subsequent records, containing the same Authorization Code, are rejected. For example:

"Mark","Brown","**8858**",".04",".05","","102","101"103" – this record is saved ""John","Smith","**8858**",".05",".10","","125","118"123" - this record is rejected because it would duplicate the Authorization Code "8858".

### User Surcharge Per Minute

Surcharge Per Minute has to be a numeric value – the only other character allowed is \$ and a decimal point.

User Surcharge Per Call

Surcharge Per Call has to be a numeric value – the only other character allowed is \$ and a decimal point.

User Multiplier (percent)

Surcharge Per Call has to be a numeric value – the only other character allowed is % and a decimal point.

### User Extension

User can have multiple extensions – multiple TEXT fields can be matched with the TAPIT Extension filed.

User Extension field allows ONLY for digits. No other characters are accepted. If other characters are found the entire User record associated with this Extension is rejected.

115- valid format.

ext. 115 – invalid format.

Extensions cannot have more than 9 digits

Extension cannot be duplicated in TAPIT. If an Extension already exists in TAPIT Database the entire record associated with this Extension is rejected. For example:

There is a USER in TAPIT with the Extension "125".

In this case the attempt to import record:

"Mark","Brown","8858",".05",".10","","**125**","118"123" will be unsuccessful because it would duplicate the Extension –" 125".





If an Extension is duplicated within the CSV file the record with the first instance of this Extension is saved in TAPIT Database. All subsequent records containing the same Extension are rejected. For example:

"Mark","Brown","8858",".04",".05","","102","**125**"103" – this record is saved. ""John","Smith","4589",".05",".10","","**125**","118"123" - this record is rejected because it would duplicate the extension "125".



### Importing Users Without Departments

Example of User CSV file (displayed in MS Excel)

🔀 Microsoft Excel - User.csv						
8	<u>File E</u> dit	⊻iew <u>I</u> nse	ert F <u>o</u> rmat	<u>T</u> ools <u>D</u> a	ata <u>W</u> indow	
D	🖻 🔒 🗧	) 🔁 🖾 🕯	à 💞 🕺		ν 🍓 Σ 🝷 🤹	
<b>č</b> a	<b>ta ta</b> 2	1 🔁 🛍	2 🖪 🖻	Reply w	vith <u>⊂</u> hanges…	
	J29	•	fx .			
	A	В	С	D	E	
1	first	last	auth	ext1	ext2	
2	David	Brady		2830	2831	
3	Hellen	Smith		2829	2832	
4	Joe	McDonald		2828	2833	
5	Larry			2827	2834	
6	Dianne	Jones		2830	2835	
7	Daniel	Constant			2836	
8	Ashley	Dermack			2837	
9	Thomas	Timothy			2838	
10	Abigail	Pulkita			2868	
11	Erick	Evans			8774	
12	Tyler	Darling	401885		48013	
13	Connor	Dill	40*#89		48014	
14	Ben	Davis	404852		48015	
15	Daniel	Chuang	401268		48017	
16	Ann	Kroeger	401565		48018	
17	Matthew	Nolle	401587		48019	
18	Andrew	Sullivan	401586		48020	
19						

Line No.	Imported to TAPIT?	Why is the User record rejected?
Line 1	NO	This is the header line. TAPIT Import Wizard prompts to indicate if the CSV file contains headers. If the indicator is set properly this line will not be imported to TAPIT.
Line 2 -4	YES	
Line 5	NO	The required USER filed Last Name is left blank.
Line 6	NO	The Extension field does not accept any duplicates. Extension 2830 already exists in TAPIT because this extension has already been used for user on line 2 and line 2 has already been imported.
Lines 7-12	YES	
Line 13 NO digits and letter format becaus		The Authorization Code TAPIT field accepts only digits and letters. The 40*#89 is not a correct format because it contains other characters (*#).
Lines 14-19	YES	



### Using Import Wizard – Users Without Departments

1. Start Import Wizard by clicking on **START/TAPIT/TAPIT IMPORT**. TAPIT User/Client Import screen appears.

🐃 TAPIT Import Wizard 1.1.0		
TAPIT User/Client	Import	
TAPIT IMPORT USERS CLIENTS	Welcome to the TAPIT User/Client Import Wizard This utility program guides you through client/user data import. Data can be imported from a comma delimited (CSV) file. TAPIT Client/User Id fields are not available for import from the CSV file. Instead TAPIT assigns a new User Id to each imported record. User Instructions Examples of CSV Files Click on 'Next >>' to Continue.	
Cancel	<< Back Next >> Finish	

2. Click on **Next**.

Select **Destination Table** screen displays.

Select IMPORT destination TAPIT table:
C CLIENTS
• USERS

Click on **User** option to check it.

3. Click on **Next**.

**Import Departments** screen appears. In this example the CSV file does not contain any departments. Click on No to the **Do you want to import Departments?** 





### 4. Click on Next.

Locate Files screen opens.

Enter the Path to the CSV file, or click on the Browse button to find it.

Import USERS from CSV File: Enter the path to the csv file or click on 'Browse' to find it.	
C:\CVSfiles\User.csv	Browse

Enter the Path to the TAPIT Database, or click on the **Browse** button to find it.

Import TO TAPIT Database (tapitdb.mdb) File:					
Enter the path to the TAPIT database (tapitdb.mdb) file or click on 'Browse' to	o find it.				
C:\TapitW32\Tapitdb.mdb	Browse				

5. Click on **Next**.

Column Headers screen comes up.



Colum	n Headers		<b>-</b>		
		USERS IMPOR			
Examples of View	CSV files sample CSV file for U	ser import			
✓ Does the fir	st row contain header?	o Tout Eilo Data (may 10	0 records shown)		
first	last	auth	evt1	evt?	_
David	Bradu	dutt	2830	2831	
Hellen	Smith		2030	2832	
Joe	McDonald		2828	2833	
_arrv			2827	2834	
Dianne	Jones		2830	2835	
Daniel	Constant			2836	
Ashley	Dermack			2837	
Thomas	Timothy			2838	
Abigail	Pulkita			2868	
Erick	Evans			8774	
Tyler	Darling	40188	5	48013	
Connor	Dill	40×#89	9	48014	
Ben	Davis	404852	2	48015	
Daniel	Chuang	401268	3	48017	
Ann	Kroeger	40156	5	48018	
Matthew	Nolle	401583	7	48019	
Andrew	Sullivan	401586	6	48020	
<b>∢</b>					Þ
C	Cancel	<< Back	Next >>	Finish	

### Does the first row contain headers?

Check this option if the first line of your CSV file contains TEXT field names.

Does the first row contain header?

6. The **Sample Text File Date** is displayed on your screen. Only the first 100 lines of your CSV file are displayed. Please check if the CSV data is separated into columns properly.

	Sampi	le Text File Data (max	k 100 records s	nown)	
first	last	auth	ext1		ext2
David	Brady			2830	2831
Hellen	Smith			2829	2832
Joe	McDonald			2828	2833
Larry				2827	2834
Dianne	Jones			2830	2835
Daniel	Constant				2836
Ashley	Dermack				2837
Thomas	Timothy				2838
Abigail	Pulkita				2868
Erick	Evans				8774
Tyler	Darling	4	01885		48013
Connor	Dill	4	0×#89		48014



### 7. Click on **Next**.

The Match Fields screen appears.

This screen lets you match TEXT fields with the corresponding TAPIT fields.

🖏 TAPIT Import Wizard 1.1	.0				<u> </u>
Match Fie	lds				
USERS IMPORT					
Records to IMPORT:		Sample Text F	ile Data (max 100 re	cords shown)	
17	first	last	auth	ext1	ext2 🔺
	David Hellen	Brady Smith			2830
STEP 1	Joe	McDonald			2828
Select an item from 'Text File Columns'	Larru I				2827 •
list and a corresponding field name from 'Tapit Database Fields' list.	Tapit	Database Fields	Match Fields	Text File Colum	ns
STEP 2					
Click on the 'Add		Add matched	fields to the Imp	oort list	
to save this selection for Import. Repeat steps 1, 2 until all fields are matched.					
Each Tapit Field, except Extension can be matched with ONLY one Text File Column.					
Extension Field can be matched with multiple Text File Columns.	4	Remove it	tem from the Im	port list	
Cancel	·	<< Back	Next >>	Finis	ih

8. **Sample Text File Data** on the top of the screen, displays up to 100 records of the CSV TEXT file data.

The top row is the names of the TEXT file columns. These names are listed in the **Text File Columns** list box. Sample Data is provided as a reference in field matching. so you can check what data each column contains.

9. Select a TAPIT field from **TAPIT Database Fields** list box and then a corresponding item from **Text File Columns**.

Tapit Database Fields	Match Fields	Text File Columns	
User Extension	💌 💳 [ext2		•

### 10. Click on Add matched fields to the Import List.

The matched fields appear on the **Import List**.

User First Name	=	first
User Last Name	=	last
User Authorization Code	=	auth
User Extension	=	ext1
User Extension	=	ext2



Repeat steps 9 and 10 until you're done with matching fields.

### WHEN MATCHING USER FIELDS

**User Last Name** has to be included in the **Import List**. This TEXT flied (column) cannot be empty.

TAPIT **User Extension** is the only field that can be matched with multiple TEXT fields (columns). User can have multiple extensions.

All other TAPIT fields can be matched with only one TEXT field (column).

- 11. When all fields are matched, click on **Next**.
  - The **Import Screen** appears.

Tapit Database Fields	IMPORT	LIST	Text File Columns
User First Name	=	first	
User Last Name	=	last	
User Authorization Code	=	auth	
User Extension	=	ext1	
User Extension	=	ext2	

This screen displays the final field selection for import.

Import Wizard imports data the way it is matched in the **Import List**. If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen. **Add** or **Remove** rows from the **Import List**. Otherwise, click on **Finish** to import.

12. When import is completed, a confirmation message appears.



Click on OK.



### 13. The Import screen changes.

TAPIT Import Wizard 1.1.0		_ 🗆 🗙
Import	]	
	USERS IMPORT	
Total text (csv) records: 17	Total records imported to 'User' table: 14 Total records rejected: 3	
Import Log File Click on the 'View Import Log File' button to view this file in the	View Log Information - File: 030205212456_Log.log View Import LOG File	
Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	 030205212456_Log.log file is located in: C:\Program Files\Tapit Import\LogFiles\ folder.	
Rejected Records File Click on the 'View Rejected Records CSV File' button to view this file in	View Rejected Records - File: 030205212456_Rejected.csv View Rejected Records CSV File 030205212456_Rejected.csv file is located in: C:\Program Files\Tapit Import\LogFiles\ folder.	
the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV format. The Import Log file contains descriptions of errors associated with		
each rejected record. You can import rejected records again after you revise the Rejected Records CSV file. Please click on 'How to revise	How to REVISE Rejected Records CSV file	
Rejected Records file' button for instructions.	Import REVISED Rejected Records CSV File	
Cancel	<< Back Next >> Finish	

Top of the Import screen displays Import statistics.

Following example below – the CSV file contained 17 total TEXT records, 14 TEXT records were successfully saved (imported) into the TAPIT Database. 3 TEXT records were rejected (were not imported).

Total text (csv) records: 17	Total records imported to 'User' table: 14	Total records rejected: 3

14. To find out more about rejected records click on the **View Import Log File** button.



The Log file opens in Notepad.





User First Name = first User Last Name = last User Authorization Code = auth User Extension = ext1 User Extension = ext2 (Field0 UserFirstName) (Field1 UserLastName) (Field2 UserAuthCode) (Field3 Extension) (Field4 Extension)

\*\*\*Rejected rec # 1\*\*\*last is empty. This is a required field in User table and cannot be left empty.

\*\*\*Rejected rec # 2\*\*\*Extension: "2830" already exists in a database and has not been saved in TAPIT

\*\*\*Rejected rec # 3\*\*\*auth: "40\*#89" contains illegal characters. It can only contain digits and letters.

Import to the User table from file C:\CVSfiles\User.csv is completed 17 total CSV file records.

14 imported records.

3 rejected records.

15. To view rejected records click on the **View Rejected Records CSV File** button.

-View Rejected Records - File: 030205212456\_Rejected.csv

### View Rejected Records CSV File

030205212456\_Rejected.csv file is located in: C:\Program Files\Tapit Import\LogFiles\ folder.



X

16. The following screen opens up. Click on **View File**.

To Revise the Rejected Records file:

### STEP 1

Click on the 'Instructions' button. The 'Instructions.txt' file contains guidelines on how to correct the Rejected Records file.

### STEP 2

Click on the 'View File' button to open the rejected records file. Follow the guidelines from 'Instructions.txt' file and revise this file.



The Rejected Records csv file opens in Notepad. The below is the Rejected Records file produced by our example import (how it is displayed in Notepad). The entries in bold are the entries to be corrected – the log file above has a list of these entries and information on what needs to be corrected. The first row of our rejected file is the headers. The Rejected Records file headers reflect headers used originally in our CSV import file.

```
"Rec Number","last","first","auth","ext1","ext2"
"1","","Larry","","2827","2834"
"2","Jones","Dianne","","2830","2835"
"3","Dill","Connor","40*#89","","48014"
```

The revised Rejected Records file: "Rec Number","last","first","auth","ext1","ext2" "1",**"Brown"**,"Larry","","2827","2834" "2","Jones","Dianne","","**2855**","2835" "3","Dill","Connor","**402589**","","48014"

# <u>The Rejected Records file needs to be saved in Notepad under the same</u> <u>name.</u>

17. Now you can import rejected records again by clicking on **Import Revised Rejected Records CSV File**.

Import REVISED Rejected Records CSV File



18. If you have corrected the Rejected Records file and saved under the same name (overwritten) then click on **OK** to continue.

Tapit Import
This action will IMPORT C:\Program Files\Tapit Import\LogFiles\030205200609_Rejected.csv file to TAPIT. If you have revised 030205200609_Rejected file and saved changes under the same name and path (C:\Program Files\Tapit Import\LogFiles\030205200609_Rejected.csv) then click on OK. Otherwise click on CANCEL and open the file for correction using the 'View Rejected CSV File' button.
Cancel

19. TAPIT Import Wizard will import records from the Rejected Records file. When import is finished it will display the following message:

Tapit Import X	
Import Completed. Please see Import.Log for more information.	
ОК	

### Click on **OK**.

20. The Import screen changes to reflect the new import results (import from Rejected Records csv file).

In our example:

"Total text (csv) records: 3" – total number of text records in the Rejected Records csv file.

"Total records imported to 'User' table: 3" – the number of text records from the Rejected Records csv file imported to TAPIT.

"Total records rejected: 0" – the number of rejected records. This number should be 0 if all of the problems have been corrected in the Rejected Records CSV file.



TAPIT Import Wizard 1.1.0		
Import	<u> </u>	
	USERS IMPORT	
Total text (csv) records: 3	Total records imported to 'User' table: 3	Total records rejected: 0
Import Log File Click on the "View Import Log File' button to view this file in the Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	View Log Information - File: 03020521245 View Import L 030205212456_Log.log file is located in: C:\Program Files\Tapit Import\LogFiles\ folder.	56_Log.log .OG File
Rejected Records File Click on the 'View Rejected Records CSV File' button to view this file in the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV format. The Import Log file contains descriptions of errors associated with each rejected record. You can import rejected records again after you revise the Rejected Records CSV file. Please click on 'How to revise Rejected Records file' button for instructions.	View Rejected Reco	ords CSV File
Cancel	<< Back Next >>	Finish

User data is ready to be imported to TAPIT NOVA.





### **Importing Users With Departments**

### Using the same CSV file to import Users and Departments

Users and Departments can be imported from the same CSV file. The CSV file has to contain User information as well as list **Department Names** for the corresponding Users (see the example CSV file below).

Example of a User/Department	CSV file displayed in MS Excel:
------------------------------	---------------------------------

Microsoft Excel - UserDeptName.csv							
Eile Edit View Insert Format Tools Data Window Help							
🗅 🖙 🖬 🔒 🎒 🗟 🚏 🖻 💼 🕬 - 🍓 Σ 🍂 🛃 🛍 😰 😤 Arial							
K18 <b></b>							
	A	В	С	D	E	F	
1	first	last	auth	ext1	ext2	dept	
2	David	Brady		2830	2831	ACCOUNTING	
3	Hellen	Smith		2829	2832	ACCOUNTING	
4	Joe	McDonald		2828	2833	IT	
5	Larry	Jones		2827	2834	IT	
6	Dianne	Chiera		2830	2835	IT	
7	Daniel	Constant			2836	Human Resources	
8	Ashley	Dermack			2837	Human Resources	
9	Thomas	Timothy			2838	Customer Service	
10	Abigail	Pulkita			2868	Customer Service	
11	Erick	Evans			8774	Customer Service	
12	Tyler	Darling	401885		48013		
13	Connor	Dill	403489		48014	Sales	
14	Ben	Davis	404852		48015	Sales	
15	Daniel	Chuang	401268		48017	Sales	
16	Ann	Kroeger	401565		48018	Sales	
17	Matthew	Nolle	401587		48019	Sales	
18	Andrew	Sullivan	401586		48020	Sales	
10						<del>ن</del> ے ا	

### In our example:

Line 1 is the header.

Each line, except line 12, lists a Department Name (dept) corresponding to a User. Department Names associate Users with the Departments.



### Format of a User/Department CSV file

### Example of a User/Department CSV file displayed in MS Excel:

Microsoft Excel - UserDeptName.csv									
Eile Edit View Insert Format Iools Data Window Help									
] 🗅	🖻 🖬 🔒	) 🖨 🖪	쁓 🖻 🛍	l ທ + 🧕	<b>Σ</b> f*	24 🛍 🛛	Arial		• 10 • <b>B</b> <i>I</i>
	K30 💌 =								
	A	В	С	D	E	F	G	Н	I
1	first	last	auth	ext1	ext2	surcharge	surcharge	multiplier	dept
2	David	McDonald		2830	2831				ACCOUNTING
3	Hellen	Smith		2830	2832	0.2			ACCOUNTING
4	Joe			2828	2833				IT
5	Larry	Jones		2827	2834				IT
6	Dianne	Chiera		2826	2835				IT
7	Daniel	Constant		A143	2836				Human Resources
8	Ashley	Dermack			2837				Human Resources
9	Thomas	Timothy			2838				Customer Service
10	Abigail	Pulkita			2868				Customer Service
11	Erick	Evans			8774				Customer Services
12	Tyler	Darling	401885		48013	\$0.05	0.8	5.00%	
13	Connor	Dill	401885		48014				Sales
14	Ben	Davis	UPSCOM		48015				Sales
15	Daniel	Chuang	99**#8		48017				Sales
16	Ann	Kroeger	401565		48018				Sales
17	Matthew	Nolle	401587		48019				Sales
18	Andrew	Sullivan	401586		48020				Sales
10									

Line No.	ls it going to be imported to TAPIT?	Why is the User record rejected?
Line 1	NO	This is the header line. TAPIT Import Wizard prompts to indicate if the CSV file contains headers. If the indicator is set properly this line will not be imported to TAPIT.
Line 2	YES	
Line 3	NO	The Extension field does not accept any duplicates. Extension 2830 already exists in TAPIT because this extension has already been used for user on line 2 and line 2 has already been imported.
Line 4	NO	The required USER field Last Name is left blank.
Line 5-6	YES	
Line 7	NO	The Extension TAPIT field accepts only digits. The A143 is not a correct format because it contains a letter.
Lines 8-13	YES	
Line 14	NO	The Authorization Code TAPIT field does not accept any duplicates. Authorization Code 401885 already exists in TAPIT because this code has already been used for user on line 13 and line 13 has already been imported.
Line 15	NO	The Authorization Code TAPIT field accepts only digits and letters. The 99**#8 is not a correct format because it contains other characters (*#).
Line 16-18	YES	


### NOTE:

 Line 11 – Department Name has a typo. It is listed as Customer Services instead of Customer Service.

As a result Customer Service**s** will be created as an additional Department and the user from line 11 (Erick Evans) will be associated with Customer Service**s** instead of Customer Service.

• If a user has **multiple extensions** they need to be listed on the same line with this user (as shown above lines 2 through 5).

# Using Import Wizard – Users WITH Departments (one CSV file)

1. Start **TAPIT Import Wizard** by clicking on **START/TAPIT/TAPIT Import. TAPIT User/Client Import** screen appears.

, TAPIT Import Wizard 1.0.23		<u> </u>
TAPIT User/Client	Import	
	Welcome to the TAPIT User/Client Import Wizard This utility program guides you through client/user data import. Data can be imported from a comma delimited (CSV) file. TAPIT Client/User Id fields are not available for import from the CSV file. Instead TAPIT assigns a new User Id to each imported record. User Instructions Examples of CSV Files Click on 'Next >>' to Continue.	
Cancel	<< Back Next >> Finish	



Click on Next. Select Destination Table screen appears.
 Select IMPORT destination TAPIT table: in this example we are importing Users.

🖷, TAPIT Import Wizard 1.0.23	
Select Destination Table  Select IMPORT destination TAPIT table:  CLIENTS  USERS	
Cancel << Back Next >> Finish	



3. The **Import Departments** screen is displayed. In our case we want to import Departments and associate them with Users. Click on the **YES** option.

TAPIT Import Wizard 1.1.0		
Import Departments?	]	
	vant to import Departments? Click on YES if you want to import Departments corresponding to Users. Departments have to be imported prior to Users. Click on Next to import Departments. When Departments Import is completed this Wizard will continue with User Import. Click on NO if you do not want to import Departments.	
Cancel	<< Back Next >> Finish	



### 4. Click on **Next**.

# Locate Files screen opens.

This is the first screen of Departments Import. Departments have to be imported prior to Users. When Departments Import is completed this wizard proceeds with Users import.

Enter the Path to the User\Department CSV file, or click on the **Browse** button to find it.

Enter the Path to the TAPIT Database, or click on the **Browse** button to find it.

🐂 TAPIT Impor	t Wizard 1.0.23			
L	ocate Files			
			DEPARTMENTS IMPORT	•
		[Import DEPARTMEN]	S from CSV File:	
		Enter the path to the csv file o	r click on 'Browse' to find it.	
		C:\csvFiles\UserDeptName.	sv	Browse
		,		
		Fimport TO TAPIT Dat	ıbase (tapitdb.mdb) File: —	
		Enter the path to the TAPIT da	abase (tapitdb.mdb) file or click on 'Brov	vse' to find it.
			italb madb	
				Browse
			1	1
	Cancel	<< Back	Next >>	Finish



# 5. Click on **Next**

#### Column Headers screen comes up.

Colum	n Headers					
	DEPARTMENTS IMPORT					
Examples of	CSV files					
Using two different CSY files to import Departments and Users Using two different CSY files to import Departments and Users						
Does the fir	st row contain header?					
	Sampl	le Text File Data (I	max 100	) records shown)		
first	last	auth		ext1	ext2	surch
David	McDonald			2830	2831	
Hellen	Smith			2830	2832	
Joe				2828	2833	
Larry	Jones			2827	2834	
Dianne	Chiera			2826	2835	
Daniel	Constant			A143	2836	
Ashley	Dermack				2837	
Thomas	Timothy				2838	
Abigail	Pulkita				2868	
Erick	Evans				8774	
Tyler	Darling		401885		48013	\$0.05
Connor	Dill		401885		48014	
Ben	Davis	UPSCOM			48015	
Daniel	Chuang		99**#8		48017	
Ann	Kroeger		401565		48018	
Matthew	Nolle		401587		48019	
Andrew	Sullivan		401586		48020	
	Cancel	<< Back		Next >>	Finish	

You can view first 100 lines of your User\Department CSV file for your reference under **Sample Text File Data**.

Please check if the displayed data reflects the User\Department CSV file (if data is separated into columns properly).

#### Please note:

Each comma is a beginning of a new column in a Comma Separated text file (CSV). Columns have to be divided by commas (not any other characters). If commas are a part of a field value they should be enclosed by double quotes i.e. "*General Telecom, Inc*".

#### Example:

Our Example.csv file contains following entry: *Simon,Gabriel,"General Telecom, Inc"* 

This file is displayed in MS Excel in the following format - in three columns.

MM	licrosoft E	kcel – examp	ole.csv
	<u>File E</u> dit	<u>V</u> iew <u>I</u> nsert	F <u>o</u> rmat <u>T</u> ools <u>D</u> ata <u>W</u> indo
	🛩 🖬 🛔	3 🖨 🖪	🂱 ۲۰ 🛍 🛍 💱
	H20	<b>•</b>	=
	A	В	C
1	Simon	Gabriel	General Telecom, Inc
-			



It should also display three columns in TAPIT Import.

Sample Text File Data (max 100 records shown)

Gabriel General Telecom, Inc

6. Does the first row contain headers?

Simon

Check this option if the first line of your CSV file contains TEXT field names.

Does the first row contain header?

The User\Department CSV, used in our example, contains headers (see **Format of a User\Department CSV file** section above, the example of CSV file, line 1). If your CSV file does not have headers it is recommended to create them. Having column names makes it easier to match TAPIT fields with the Text file columns.

7. Click on **Next**. The **Match Fields** screen appears.

This screen lets you match TAPIT fields with the corresponding TEXT file columns.

🐃 TAPIT Import Wizard 1.0	).23				
Match Fie	elds				
		DEP	ARTMENTS IMPOR	Т	
T I LOOM FI		Sample Text F	ilo Data (may 100 ro	cords shown)	
Records:		Sumple Texer			
17	first Devid	last MaDamald	auth	ext1	ext2 ▲
	Hellen	Smith			2830
STEP 1	Joe				2828
Select an item from	Larro	Jones			2827
list and a					
corresponding field			Match Fields		
Database Fields' list.	Tapit	Database Fields		lext File Column	s –
STEP 2					<u> </u>
Click on the 'Add		Add matched	fields to the Im	port list	
to save this	Department N	ame	= dept		
selection for Import.					
until all fields are					
matched.					
Each Tapit Field,					
can be matched with					
Column.					
Department Name					
is a required held	•				
		Remove it	em from the Im	port list	
	1	n Baala	•• •	1	
Cancel		< Back	Next >>	Finish	1

8. Select a TAPIT field from **TAPIT Database Fields** and then a corresponding item from **Text File Columns** list box.

Tapit Database Fields	Match Fields	Text File Columns	
Department Name	💌 💳 dept		•

In our case we only need to match Department Name with a corresponding Text File Column.



### 9. Click on Add matched fields to the Import List.

Add matched	fields to the Imp	ort list	
The matched fields appear in the <b>Import List</b> .			
Tapit Database Fields	Match Fields	Text File Columns	
Department Name	💌 💳 dept		-
Add matched	fields to the Imp	ort list	
Department Name	= dept		

# 10. When all fields are matched, click on **Next**.

#### The Import Screen is displayed.

🛋 TAPIT Import Wizard 1.0	0.23	
Import	t	
	DEPARTMENTS IMPORT	
IMPORT Import Wizard imports	Tapit Database Fields IMPORT LIST Text File Columns	
data the way it is matched in the Import List.	Department Name = dept	
Data from the Text File Columns is imported to the corresponding Tapit Fields.		
If you need to edit the IMPORT LIST click on the '< <back'< th=""><th></th><th></th></back'<>		
the 'Match Fields' screen. Add/remove the Import List items.		
TO IMPORT NOW click on the 'Finish' button.		
	<b>x</b>	
Cancel	Seck     Next     Seck	

This screen displays the final field selection for import.

- 11. Import Wizard imports data the way it is matched in the Import List. If you need to edit the Import List, click on the Back button to go back to the Match Fields screen. Add or Remove rows from the Import List using the Add matched fields to Import list or Remove item form Import list buttons. Otherwise, click on Finish to import.
- 12. When Department Import is completed, a confirmation message appears.

ImportTapit	×
Import Completed. Please see Import.Log for more informati	on.
<u>ОК</u>	

Click on **OK**.





#### 13. Your Department Import is completed.

Import screen display changes.

The top of the screen displays statistics. Following our example below:

"Total unique (csv) Departments: 6" - there has been 6 unique Department Names found

"Total records imported to 'Department' table:"4 – 4 Departments were imported "Total records rejected: 2" – 2 Departments were not imported, because they already exist in TAPIT

🖹 TAPIT Import Wizard 1.1.0	
Import	
	DEPARTMENTS IMPORT
Total unique (csv) Departments:6	Total records imported to 'Department' table: Total records rejected: 2 4
Import Log File Click on the 'View Import Log File' button to view this file in the Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records. Rejected Records File Rejected records (if any) are not imported to the TAPIT database because the Department Names already exits in TAPIT.	View Log Information - File: 022505104409_Log.log View Import LOG File 022505104409_Log.log file is located in: C:\Projects\ExportImportTapit\LogFiles\ folder. Departments import has been completed 2 records have been rejected because the Department Names already exist in TAPIT. Please click on 'Continue with User Import' button to import Users
Cancel	Continue with User Import Finish

If some **records are rejected** that means they already exist in TAPIT. You don't need to import them again.

Log file is a text file that contains information on this import. It resides in a subfolder of the folder where TAPIT Import is installed. If default options were accepted when installing TAPIT Import, this file is located in C:\Program Files\TAPIT Import\LogFiles folder. To view log file click on **View Import LOG file**. The LOG file opens in Notepad.



The log file produced by our example import:

FIELDS ARE MATCHED THE FOLLOWING WAY:

Department name = dept (Field8 DeptName) \*\*\*\*Rejected rec # 1\*\*\*dept: "ACCOUNTING " already exists in a database and

has not been saved in TAPIT

\*\*\*Rejected rec # 2\*\*\*dept: "Customer Service" already exists in a database and has not been saved in TAPIT

Import to the Department table from file C:\csvFiles\UserDeptName.csv is completed

#### (Import statistics)

17 total CSV file records.

6 unique Department Names to import.

4 imported records.

2 rejected records.





14. You can proceed with User Import

Click on the **Continue with User Import** button.

**Locate Files** screen appears. This screen lets you select a different file to import Users. However, in our import example we are importing Departments and Users from the same file.

Click on **I want to import USERS from the same file...** box to check it. The path to the User\Department CSV file appears.

The path to the TAPIT Database is saved from the Department Import and should not be changed.

T Import Wizard 1.0.23			
Locate Files	<u> </u>		
		BT (following the Departm	nents Import)
		itt (olowing the Departi	
	Import USERS from CS	/ File:	
	✓ I want to import USERS (C:\csvFiles\UserDept)	5 from the same file used to imp Name.csv)	ort DEPARTMENTS
	OR, enter the path to the csv file	or click on 'Browse' to find it.	
	C:\csvFiles\UserDeptName.csv		Browse
	⊢Import TO TAPIT Datab	ase (tapitdb.mdb) File:—	
	Enter the path to the TAPIT datab	ase (tapitdb.mdb) file or click on 'Brow	vse' to find it.
	C:\TapitW32\DATA\MAIN\tapito	lb.mdb	Browse
	C. Back		



#### 15. Click on Next.

TRISYS INC.

Column Headers screen comes up.

This screen is different from what you have seen when importing Departments. Associate Users with Departments part has been added. Since we've imported only Department Names, Department Name is the only filed that can be used to assign Users to Departments. That is why there is only one option displayed, Department Name, and this option is grayed to prevent a user from changing it.

APIT Import Wiz	ard 1.0.23					
Colum	n Headers					
	USERS IM	PORT (following	g the Departments	Import)		
Examples of	CSV files					
Usir	ng the same CSV file to Departments and Use	import rs				
Associate Us Department N This field has © Department	ers with Departments ame is the only field ir to be used to associate Name To associate Users the CSV file has to l	nported from Dep e Users with Dep with Departments: ist Users with the corres	partments. artments sponding to them DEPAR	IMENT NAMI	ES.	
✓ Does the firs	t row contain header? Sample	Text File Data (r	nax 100 records s	hown)		
first	last	auth	ext1		ext2	SL 🔺
David	McDonald			2830	2831	
Hellen	Smith			2830	2832	
Joe				2828	2833	
Larry	Jones			2827	2834	
Dianne	Chiera			2826	2835	
Daniel	Constant		A143		2836	
Ashley	Dermack				2837	
Thomas	Timothy				2838	
Abigail	Pulkita				2868	
Erick	Evans				8774	
Tyler	Darling		401885		48013	\$( 🖵
ί.	<b>IN 11</b>		101.005		1001.1	الش ج
C	ancel<	< Back	Next >>		Finish	

16. Since we are using the same CSV file and the Wizard already knows that it contains headers the **Does the first roc contain header?** box is checked.



### 17. Click on **Next**.

# The Match Fields screen appears.

This screen lets you match TAPIT fields with the corresponding TEXT fields.

TAPIT Import Wizard 1.0	0.23						
Match Fie	elds						
	U	SERS IMPORT	(following the	e De <mark>partm</mark> e	nts Import)		
Records to IMPORT:		Sample Text F	ile Data (max	100 record	ls shown)		
17	first David	last McDonald	auth		ext1	ext2 ▲	
	Hellen	Smith				2830	-
STEP 1	Joe					2828	
Select an item from 'Text File Columns'	Larru ◀	Jones				2827	1
list and a							
corresponding field name from 'Tapit	Tanit Dat	tahaso Fiolds	Match Fi	elds <sub>T</sub>	ovt Filo Colu	mpc	
Database Fields' list.	User Extension			xt2	CACT IIC COID	• •	1
STEP 2	TADIT DEDARTM	ENT NAME! field	Lhac to be ma	tchod with t	ha carracaa	nding field in a	1
Click on the 'Add matched ' button	TAFTI DEFANIN	text file to a	ssociate User:	s with Depai	rtments	nung neru m u	
to save this	A	dd matched	fields to t	he Impor	t list		11
Repeat steps 1, 2							
until all fields are matched	User First Name		=	dept first			
matcheu.	User Last Name		=	last			
Each Tapit Field,	User Authorization	Code	=	auth			
except Extension can be matched with	User Surcharge Pe	er Minute	=	surcharge per	Minute		
ONLY one Text File	User Surcharge Pe	er Call	=	surcharge per l	Call		
Column.	User Multiplier (per	centj		evt1			
	User Extension		=	ext2			
Extension Field							
is a required field						F	
		Remove i	tem from t	he Impor	t list		
Cancel	<	Back	Next	>>	Fi	nish	

18. Select a TAPIT field from **TAPIT Database Fields** and then a corresponding item from **Text File Columns** list box.

Tapit Database Fields	Match Fields	Text File Columns	
User Extension	💌 💳 [ext2		•

19. Click on Add matched fields to the Import List.

Add matched fields to the Import list

The matched fields appear on the **Import List**.



	Tapit Database Fields Matcl	n Fie	elds Text File Columns		
User E	xtension 🔽	= ex	12 🔽		
ТАРІ	TAPIT 'DEPARTMENT NAME' field has to be matched with the corresponding field in a text file to associate Users with Departments				
	Add matched fields to the Import list				
D	epartment Name	=	dept		
U:	ser First Name	=	first		
U:	ser Last Name	=	last		
U:	ser Authorization Code	=	auth		
U:	ser Surcharge Per Minute	=	surcharge per Minute		
U:	ser Surcharge Per Call	=	surcharge per Call		
U:	ser Multiplier (percent)	=	multiplier		
U	ser Extension	=	ext1		
U:	ser Extension	=	ext2		

### WHEN MATCHING USER FIELDS

**The field associating Users with Departments has to be matched.** In our case it is the Department Name field.

**User Last Name** has to be included in the **Import List**. This TEXT field (column) cannot be empty.

TAPIT **User Extension** is the only field that can be matched with multiple TEXT fields (columns). User can have multiple extensions.

All other TAPIT fields can be matched with only one TEXT field (column).



20. When all fields are matched, click on **Next**.

TAPIT Import Wizard 1.0.	23		
Import			
	USERS IMPORT (following the	Departments Import)	
IMPORT	Tapit Database Fields	IMPORT LIST Text File Columns	
Import Wizard imports data the way it is	Department Name	= dept	
matched in the Import	User First Name	= first	
List.	User Last Name	= last	
Data from the Text	User Authorization Code	= auth	
File Columns is	User Surcharge Per Minute	<ul> <li>surcharge per Minute</li> </ul>	
imported to the	User Surcharge Per Call	= surcharge per Call	
corresponding Tapit	User Multiplier (percent)	= multiplier	
rielas.	User Extension	= ext1	
If you need to edit	User Extension	= ext2	
the IMPORT LIST click on the '< <back'< th=""><th></th><th></th><th></th></back'<>			
button to go back to the 'Match Fields'			
the Import List items.			
TO IMPORT NOW			
button			
Datton.			
			▶
		1	1

This screen displays the final field selection for import.

TAPIT Import Wizard imports data the way it is matched in the **Import List**. If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen.

Add or Remove rows from the Import List using the Add matched fields to Import list or Remove item form Import list buttons. Otherwise, click on Finish to import.

21. When import is completed, a confirmation message appears.

ImportTapit X
Import Completed. Please see Import.Log for more information.
OK

Click on **OK**.



### 22. The Import screen changes.



Top of the Import screen displays Import statistics.

Following example below – the CSV file contained 17 total TEXT records, 12 TEXT records were successfully saved (imported) into the TAPIT Database. 5 TEXT records were rejected (were not imported).



23. To find out more about rejected records click on the **View Import Log File** button.



The log file contains two parts: the Department part and the Users part.



Scroll down to see the Users Import part.

=====USERS IMPOF	T======			
Import FROM CSV file C:\csvFiles\UserDeptName.csv				
Import TO the C:\TAPITW32\DATA\MAIN\TAPIT	DB.MDB database, User table			
******************************02/25/05 11:49	) ***********			
***************************************	**********			
FIELDS ARE MATCHED THE FOLLOWING WAY:				
Department name = dept	(Field8 DeptName)			
User First Name = first	(Field0 UserFirstName)			
User Last Name = last	(Field1 UserLastName)			
User Authorization Code = auth	(Field2 UserAuthCode)			
User Surcharge Per Minute = surcharge per	(Field5 UserSurchargePerMinute)			

# (why records were rejected rec # matches the record number in a rejected file csv)

\*\*\*Rejected rec # 1\*\*\*Extension: "2830" already exists in a database and has not been saved in TAPIT

\*\*\*Rejected rec # 2\*\*\*last is empty. This a required field in User table and cannot be left empty.

\*\*\*Rejected rec # 3\*\*\*Extension: "A143" contains illegal characters. Only digits are allowed. and has not been saved in TAPIT

\*\*\*Rejected rec # 4\*\*\*auth: "401885" already exists in TAPIT database, User table

\*\*\*Rejected rec # 5\*\*\*auth: "99\*\*#8 " contains illegal characters. It can only contain digits and letters.

### (Import statistics)

Minute

Import to the User table from file C:\csvFiles\UserDeptName.csv is completed 17 total CSV file records.

12 imported records.

5 rejected records.

24. To view rejected records click on the **View Rejected Records CSV File** button.

#### View Rejected Records CSV File

082304103015\_Rejected.csv file is located in: C:\Projects\ExportImportTapit\LogFiles\ folder.



X

25. The following screen opens up. Click on View File.
To Revise the Rejected Records CSV File
To Revise the Rejected Records file:
STEP 1 Click on the 'Instructions' button. The 'Instructions.txt' file contains guidelines on how to correct the Rejected Records file.
STEP 2

Click on the 'View File' button to open the rejected records file. Follow the guidelines from 'Instructions.txt' file and revise this file.

Cancel View Instructions View File

The Rejected Records csv file opens in Notepad. The below is the Rejected Records file produced by our example import (how it is displayed in Notepad). The entries in bold are the entries to be corrected – the log file above has a list of these entries and information on what needs to be corrected. The first row of our rejected file is the headers. The Rejected Records file headers reflect headers used originally in our CSV import file.

"Rec Number","last","dept","first","surcharge per Minute","surcharge per Call","multiplier","auth","ext1","ext2"

"1","Smith","ACCOUNTING ","Hellen","0.2","","","","**2830**","2832"

"2",**""**,"IT","Joe","","","","","2828","2833"

"3","Constant","Human Resources","Daniel","","","","","**A143**","2836"

"4","Dill","Sales","Connor","","","401885","","48014"

"5","Chuang","Sales","Daniel","","","","**99\*\*#8** ","","48017"

The same Rejected Records file after corrections:

"Rec Number","last","dept","first","surcharge per Minute","surcharge per Call","multiplier","auth","ext1","ext2"

"1","Smith","ACCOUNTING ","Hellen","0.2","","","","**2855**","2832"

"2",**"Brown"**,"IT","Joe","","","","","2828","2833"

"3","Constant","Human Resources","Daniel","","","","**4143**","2836"

"4","Dill","Sales","Connor","","","**401995**","","48014"

"5","Chuang","Sales","Daniel","","","","41998","","48017"

The Rejected Records file needs to be saved in Notepad under the same name.

26. Now you can import rejected records again by clicking on **Import Revised Rejected Records CSV File**.

Import REVISED Rejected Records CSV File



27. If you have corrected the Rejected Records file and saved under the same name (overwritten) then click on **OK** to continue.

Tapit Import
This action will IMPORT C:\Projects\ExportImportTapit\LogFiles\022505114410_Rejected.csv file to TAPIT. If you have revised 022505114410_Rejected file and saved changes under the same name and path (C:\Projects\ExportImportTapit\LogFiles\022505114410_Rejected.csv) then click on OK. Otherwise click on CANCEL and open the file for correction using the 'View Rejected CSV File' button.
OK Cancel

28. TAPIT Import Wizard will import records from the Rejected Records file. When import is finished it will display the following message:

Tapit Import 🛛 🔀
Import Completed. Please see Import.Log for more information.
OK

Click on **OK**.





29. The Import screen changes to reflect the new import results (import from Rejected Records csv file).

"Total text (csv) records: 5" – total number of text records in the Rejected Records csv file.

"Total records imported to 'User' table:"5 – the number of text records from the Rejected Records csv file imported to TAPIT.

"Total records rejected: 0" – the number of rejected records. This number should be 0 if all of the problems have been corrected in the Rejected Records csv file.

S. TAPIT Import Wizard 1.1.0		<u>_     ×</u>
Import	L	
USERS	SIMPORT (following the Departments Import)	
Total text (csv) records: 5	Total records imported to 'User' table: 5 Total records rejected: 0	
Import Log File Click on the 'View Import Log File' button to view this file in the Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	View Log Information - File: 022505114410_Log.log View Import LOG File 022505114410_Log.log file is located in: C:\Projects\ExportImportTapit\LogFiles\ folder. There are no rejected records - the csv file has not been created	
Rejected Records File Click on the 'View Rejected Records CSV File' button to view this file in the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV format. The Import Log file contains descriptions of errors associated with each rejected record. You can import rejected records again after you revise the Rejected Records CSV file. Please click on 'How to revise Rejected Records file' button for instructions.	View Rejected Records CSV File	
Cancel	<< Back Next >> Finish	

Your import is completed.



### Using different CSV files to import Users ad Departments

You have two csv files: User csv file and Department csv file.

<u>CASE 1</u> - Users are associated with Departments via Department Names User csv file contains **User information** as well as lists **Department Names** (and optionally Department Ids) for the corresponding Users.

🔀 Microsoft Excel -	UserDeptIdName.csv
---------------------	--------------------

Eile Edit View Insert Format Tools Data Window Help							
	🖻 🖬 🔒	) 5 🔍	🌮 🖻 🛍	<b>ω</b> • 6	<b>Σ</b> f*	🛃 📶 🕄 🐥 Arial	
	K27	•	=				
	A	В	С	D	E	F	G
1	first	last	auth	ext1	ext2	dept	dept no.
2	David	Brady		2830	2831	ACCOUNTING	1
3	Hellen	Smith		2829	2832	ACCOUNTING	1
4	Joe	McDonald		2828	2833	IT	2
5	Larry	Jones		2827	2834	IT	2
6	Dianne	Chiera		2830	2835	IT	2
7	Daniel	Constant			2836	Human Resources	3
8	Ashley	Dermack			2837	Human Resources	3
9	Thomas	Timothy			2838	Customer Service	4
10	Abigail	Pulkita			2868	Customer Service	4
11	Erick	Evans			8774	Customer Service	4
12	Tyler	Darling	401885		48013		
13	Connor	Dill	403489		48014	Sales	5
14	Ben	Davis	404852		48015	Sales	5
15	Daniel	Chuang	401268		48017	Sales	5
16	Ann	Kroeger	401565		48018	Sales	5
17	Matthew	Nolle	401587		48019	Sales	5
18	Andrew	Sullivan	401586		48020	Sales	5

Department csv file contains a list of all the departments – **Department Names** (and optionally Department Ids).

Microsoft Excel - DeptIdName.csv					
	<u>File E</u> dit <u>V</u> iew <u>I</u> nser	t F <u>o</u> rmat <u>T</u>	ools		
] 🗅	😂 🖬 🔒 🎒 🖸	), 🚏 🖻	e		
	E11 🔽	=			
	A	В			
1	dept	dept no.			
2	ACCOUNTING	1			
3	IT	2			
4	Human Resources	3			
5	Customer Service	4			
6	Sales	5			
7					

If User csv file contains all Department Names that you want to import (as displayed in our example screens above) you can use the same file to import both Users and Departments (see section **Using the same csv file to import Users and Departments** above).





However, if your Department csv file contains more departments than listed throughout the User csv file (see the example screen below) then you need to follow directions in this section.

NAME OF TAXABLE	🔀 Microsoft Excel - DeptIdName.csv					
		<u>File E</u> dit <u>V</u> iew <u>I</u> nser	t F <u>o</u> rm	iat <u>T</u>	00	
		🛎 🖬 🔒 🖨 🕻	à 💞	8	Ĉ	
		114 💌	=			
[		A	В			
	1	dept	dept n	10.		
	2	ACCOUNTING		1		
	3	IT		2		
	4	Human Resources		3		
	5	Customer Service		- 4		
	6	Sales		- 5		
	7	Marketing		6		
1	0					

This Department csv file lists Marketing as a Department Name. Marketing department is not found in the User csv file. If you want to import Marketing then you have to use both files to import Users and Departments.

**CASE 2** - Users are associated with Departments via Department Ids User csv file contains User information as well as lists Department Ids (the Ids are not accompanied by Department Names) for the corresponding Users. Microsoft Excel - UserDentId.c

Eile Edit View Insert Format Iools Data Window Help						
	🖻 🖬 🔒	) 5 4	* 🖻 🖡	L 🗤 🧯	<b>Σ</b> f*	24 🛍 🕄
	H7	<b>•</b>	=			
	A	В	С	D	E	F
1	first	last	auth	ext1	ext2	dept no.
2	David	Brady		2830	2831	1
3	Hellen	Smith		2829	2832	1
4	Joe	McDonald		2828	2833	2
5	Larry	Jones		2827	2834	2
6	Dianne	Chiera		2830	2835	2
7	Daniel	Constant			2836	3
8	Ashley	Dermack			2837	3
9	Thomas	Timothy			2838	4
10	Abigail	Pulkita			2868	4
11	Erick	Evans			8774	4
12	Tyler	Darling	401885		48013	
13	Connor	Dill	403489		48014	5
14	Ben	Davis	404852		48015	5
15	Daniel	Chuang	401268		48017	5
16	Ann	Kroeger	401565		48018	5
17	Matthew	Nolle	401587		48019	5
18	Andrew	Sullivan	401586		48020	5
10						

Department csv file contains a list of all the departments - Department Names and **Department Ids** (both are required in this case).



	licrosoft Excel - Depl	IdName.cs	v I
	<u>File E</u> dit <u>V</u> iew Inser	t F <u>o</u> rmat <u>T</u>	jools
0	🖻 🔒 🔒 🖉	۵ 🌾 🗈	e
	E11 💌	=	
	A	В	
1	dept	dept no.	
2	ACCOUNTING	1	
3	IT	2	
4	Human Resources	3	
5	Customer Service	4	
6	Sales	5	
7			-۲

If this description matches your csv files, the please follow import directions from this section.

# Format of a User CSV file

Example of a User CSV file displayed in MS Excel:

	X Microsoft Excel - UserDeptId.csv									
]	🗓 <u>F</u> ile <u>E</u> dit	<u>V</u> iew <u>I</u> nsert	F <u>o</u> rmat <u>T</u> ool	s <u>D</u> ata <u>W</u> in	idow <u>H</u> elp					
] [	🗅 🚅 🔚 ı	a a d	쁓 🖻 🛍	L 10 τ 🧯	<b>Σ</b> f <sub>*</sub>	24 🛍 🗵	Arial 🍣		<b>-</b> 10	
	K4	-	=							
	A	В	C	D	E	F	G	Н		
	l first	last	auth	ext1	ext2	surcharge	surcharge	multiplier	dept no.	
2	2 David	McDonald		2830	2831				1	
3	B Hellen	Smith		2830	2832	0.2			1	
4	1 Joe			2828	2833				2	
Ę	5 Larry	Jones		2827	2834				2	
6	6 Dianne	Chiera		2826	2835				2	
7	7 Daniel	Constant		A143	2836				3	
8	3 Ashley	Dermack			2837				3	
9	3 Thomas	Timothy			2838				4	
1	0 Abigail	Pulkita			2868				4	
1	1 Erick	Evans			8774				4	
1	2 Tyler	Darling	401885		48013	\$0.05	0.8	0.50%		
1	3 Connor	Dill	401885		48014				5	
1	4 Ben	Davis	UPSCOM		48015				5	
1	5 Daniel	Chuang	99**#8		48017				5	
1	6 Ann	Kroeger	401565		48018				5	
1	7 Matthew	Nolle	401587		48019				5	
1	8 Andrew	Sullivan	401586		48020				5	
1	q									

Line No.	ls it going to be imported to TAPIT?	Why is the User record rejected?
Line 1	NO	This is the header line. TAPIT Import Wizard prompts to indicate if the CSV file contains headers. If the indicator is set properly this line will not be imported to TAPIT.
Line 2	YES	
Line 3	NO	The Extension field does not accept any duplicates.



		Extension 2830 already exists in TAPIT because this
		extension has already been used for user on line 2 and
		line 2 has already been imported.
Line 4	NO	The required USER field Last Name is left blank.
Line 5-6	YES	
line 7	NO	The Extension TAPIT field accepts only digits. The A143 is
Line /	NO	not a correct format because it contains a letter.
Lines 8-13	YES	
	NO	The Authorization Code TAPIT field does not accept any
Lino 14		duplicates. Authorization Code 401885 already exists in
LINE 14		TAPIT because this code has already been used for user
		on line 13 and line 13 has already been imported.
		The Authorization Code TAPIT field accepts only digits
Line 15	NO	and letters. The 99**#8 is not a correct format because it
		contains other characters (*#).
Line 16-18	YES	

### NOTE:

- If a user has **multiple extensions**, they need to be listed on the same line with this user (as shown above lines 2 through 5).
- Line 12 User Tyler Darling is not assigned to any department.

# Format of a Department CSV File

Example of a Department CSV file displayed in MS Excel:

🔀 Microsoft Excel - DeptIdName.csv					
	<u>File E</u> dit <u>V</u> iew <u>I</u> nser	t F <u>o</u> rmat <u>T</u>	ools		
] 🗅	🖻 🖶 🔒 🖾	à 🌾 🖻	e		
	E11 🔽	=			
	A	В			
1	dept	dept no.			
2	ACCOUNTING	1			
3	IT	2			
4	Human Resources	3			
5	Customer Service	4			
6	Sales	5			
7			_ ر <b>د</b>		

Line 1 – text columns headers –it is not going to be imported to TAPIT. Line 2 – 6 are all going to be imported, provided none of the Department Names exists in TAPIT.



# Using Import Wizard – Users WITH Departments (two different CSV files)

1. Start **TAPIT Import Wizard** by clicking on **START/TAPIT/TAPIT Import**. **TAPIT User/Client Import** screen appears.

, TAPIT Import Wizard 1.0.2	3	
TAPIT User/Clien	t Import	
	Welcome to the TAPIT User/Client Import Wizard This utility program guides you through client/user data import. Data can be imported from a comma delimited (CSV) file. TAPIT Client/User Id fields are not available for import from the CSV file. Instead TAPIT assigns a new User Id to each imported record. User Instructions Examples of CSV Files Click on 'Next >>' to Continue.	
Cancel	< Back Next >> Finish	



2. Click on **Next**.

**Select Destination Table** screen appears. **Select IMPORT destination TAPIT table:** in this example we are importing Users.

🐂 TAPIT Import Wizard 1.0.23		_ 🗆 🗵
	Select IMPORT destination TAPIT table: C CLIENTS © USERS	
Cancel	<         Back         Next         >>         Finish	



3. The **Import Departments?** screen is displayed. In our case we want to import Departments and associate them with Users. Click on the **YES** option.

, TAPIT Import Wizard 1.1.0		
Import Departments?		
	Click on YES if you want to import Departments corresponding to Users. Departments have to be imported prior to Users. Click on Next to import Departments. When Departments Import is completed this Wizard will continue with User Import. Click on NO if you do not want to import Departments.	
Cancel	<< Back Next >> Finish	



### 4. Click on **Next**.

# Locate Files screen opens.

This is the first screen of Departments Import. Departments have to be imported prior to Users. When Departments Import is completed this wizard proceeds with Users import.

Enter the Path to the Department CSV file or click on the **Browse** button to find it. Enter the Path to the TAPIT Database, or click on the **Browse** button to find it.

💐 TAPIT Imp	ort Wizard 1.1.0		<u>- 🗆 ×</u>
	Locate Files		
		,	
			_ I
		DEPARTMENTS IMPORT	_
		Import DEPARTMENTS from CSV File:	
		Enter the path to the csv file or click on 'Browse' to find it.	
		C:\csvFiles\DeptIdName.csv Browse	
			-
		- Import TO TAPIT Detebaco (tenitdb mdb) Filo:	
		Import to tArti Database (tapitab.indb) the.	
		Enter the path to the TAPIT database (tapitdb.mdb) file or click on 'Browse' to find it.	
		C:\TapitW32\DATA\MAIN\TAPITDB.MDB Browse	
- T			
	Cancel	<< Back Next >> Finish	



# 5. Click on **Next**.

Column Headers screen comes up.

APIT Import Wizard 1.1	.0		_ [] >			
Column Hea	aders					
	DEDADTA					
DEPARTMENTS IMPORT						
Examples of CSV files -						
Depa	rtments and Users	Departments and Users				
Does the first row o	contain header?					
	Sample Text File Dat	a (max 100 records shown)				
dept	dept no.					
ACCOUNTING	1					
IT	2					
Human Resources	3					
Customer Service	4					
Sales	5					
Cancel	<< Back	Next >> Finis	h			

You can view first 100 lines of your Department CSV file for your reference under **Sample Text File Data**.

Please check if the displayed data reflects the Department CSV file (if data is separated into columns properly).

#### Please note:

Each comma is a beginning of a new column in a Comma Separated text file (CSV). Columns have to be divided by commas (not any other characters).

If commas are a part of a field value they should be enclosed by double quotes i.e. "*General Telecom, Inc*".

### Example:

Example.csv file contains following entry: *Simon,Gabriel,"General Telecom, Inc"* This file is displayed in MS Excel in the following format – in three columns.

Microsoft Excel - example.csv									
	<u>File E</u> dit <u>V</u> i	iew <u>I</u> nsert	F <u>o</u> rmat <u>T</u> ools <u>D</u> ata <u>W</u> ine	do					
	🖻 🖬 🔒	) 🖨 🖪	🂱 🖻 🛍 🗠 🗸 🤮	5					
	H20	<b>•</b>	=						
	A	В	С						
1	Simon	Gabriel	General Telecom, Inc						

It should also display three columns in TAPIT Import.



Sample Text File Data (max 100 records shown)

### 6. Does the first row contain headers?

Gabriel

Check this option if the first line of your CSV file contains TEXT field names.

General Telecom, Inc

Does the first row contain header?

The Department CSV used in our example contains headers (see **Format of a Department CSV file** section above, the example of CSV file, line 1). If your CSV file does not have headers it is recommended to create them. Having column names makes it easier to match TAPIT fields with the Text file columns.

### 7. Click on **Next**.

Simon

#### The Match Fields screen appears.

This screen lets you match TAPIT fields with the corresponding TEXT file columns.

🛢 TAPIT Import Wizard 1.1	1.0						
Match Fie	elds						
		DE	PARTMENTS IMPOR	श			
Total CSV File		Sample Text	File Data (max 100 re	ecords shown)			
5	dept	dept no.	Field 2	Field 3	Field 🔺		
	IT		2				
STEP 1	Human Resources		3				
Select an item from 'Text File Columns'	Lustomer Service		4				
corresponding field name from 'Tapit	Tapit Da	tabase Fields	Match Fields	Text File Columns			
Database Fields' list.	Department Id		💌 💳 dept no.		•		
STEP 2 Click on the 'Add	Add matched fields to the Import list						
to save this	Department Name		= dept				
selection for Import. Repeat steps 1, 2	Department Id		= dept no.				
until all fields are matched.							
Each Tapit Field,							
can be matched with ONLY one Text File							
Column.							
Department Name							
is a required field	•				•		
		Remove	item from the Im	port list			
		Back	Nout 22	Etatel	1		
		BaCK	Next >>				

8. Select a TAPIT field from **TAPIT Database Fields** and then a corresponding item from **Text File Columns** list box.

Tapit Database Fields	Match Fields	Text File Columns	
Department Id	💌 💳 dept no.		•
In our chase we only need to ma	tch Doportmont Nom	a with a corresponding	

In our chase we only need to match Department Name with a corresponding Text File Column.



### 9. Click on Add matched fields to the Import List.

Add matched fields to the Import list								
The matched fields appear in the <b>Import List</b> .								
Tapit Database Fields	Match Fie	lds	Text File Columns					
Department Id	💌 💳 [dep	t no.		•				
Add matched fields to the Import list								
Department Name	=	dept						
Department Id	=	dept no.						

In our example User csv file contains ONLY Department Ids (Users are associated with Departments via Department Ids) that is why we need to import data to both Department Name and Department Id fields. If your User csv file contains Department Names (Users are associated with Departments via Department Names) then you don't have to import Department Ids.

10. When all fields are matched, click on **Next**.

#### The **Import Screen** is displayed.

, TAPIT Import Wizard 1.1.	.0					<u> </u>
Import						
		DEPARTMENT				
		DEFATURENT				
IMPORT	Tap	it Database Fields	IMPORT	LIST	Text File Columns	
Import Wizard imports	Department Name		=	dept		
matched in the Import	Department Id		=	dept no.		
List.						
Data from the Text						
imported to the						
corresponding Lapit Fields.						
If you would be added						
the IMPORT LIST						
click on the '< <back'< th=""><th></th><th></th><th></th><th></th><th></th><th></th></back'<>						
button to go back to the 'Match Fields'						
screen. Add/remove						
the hilport List items.						
TO IMPORT NOW						
button.						
						Þ
Cancel	<	< Back	Next	>>	Finish	

#### This screen displays the final field selection for import.



- 11. Import Wizard imports data the way it is matched in the Import List. If you need to edit the Import List, click on the Back button to go back to the Match Fields screen. Add or Remove rows from the Import List using the Add matched fields to Import list or Remove item form Import list buttons. Otherwise, click on Finish to import.
- 12. When Department Import is completed, a confirmation message appears.

ImportTapit	×
Import Completed. Please see Im	port.Log for more information.
(OK	

Click on **OK**.

#### 13. Your Department Import is completed.

Import screen display changes.

The top of the screen displays statistics.

Following our example:

"Total unique (csv) Departments: 5" - there has been 5 unique Department Names found.

"Total records imported to 'Department' table:"3 – 3 Departments were imported "Total records rejected: 2" – 2 Departments were not imported, because they already exist in TAPIT.

🖏 TAPIT Import Wizard 1.1.0	
Import	
	DEPARTMENTS IMPORT
Total unique (csv) Departments:5	Total records imported to 'Department' table: Total records rejected: 2 3
Import Log File         Click on the 'View Import Log File'         button to view this file in the         Notepad.exe application.         Log file contains general information         about the Import Wizard. This file has         a record of errors and description of         rejected records.         Rejected Records File         Rejected records (if any) are not         imported to the TAPIT database         because the Department Names         already exits in TAPIT.	View Log Information - File: 022805122917_Log.log View Import LOG File 022805122917_Log.log file is located in: C:\Program Files\Tapit Import\LogFiles\ folder. Departments import has been completed 2 records have been rejected because the Department Names already exist in
	Please click on 'Continue with User Import' button to import Users
Cancel	Continue with User Import Finish



If some **records are rejected** that means they already exist in TAPIT. You don't need to import them again.

Log file is a text file that contains information on this import. It resides in a subfolder of the folder where TAPIT Import is installed. If default options were accepted when installing TAPIT Import, this file is located in C:\Program Files\TAPIT Import\LogFiles folder. To view log file click on **View Import LOG file**. The LOG file opens in Notepad.

The log file produced by our example import:

Import FROM CSV file C:\csvFiles\DeptIdName.csv Import TO the C:\TAPITW32\DATA\MAIN\TAPITDB.MDB database, Department table FIELDS ARE MATCHED THE FOLLOWING WAY: Department Name = dept (Field0 DeptName) Department Id = dept no. (Field1 DeptId) \*\*\*Rejected rec # 1\*\*\*dept: "ACCOUNTING " already exists in a database and has not been saved in TAPIT \*\*\*Rejected rec # 2\*\*\*dept: "Customer Service" already exists in a database and has not been saved in TAPIT Import to the Department table from file C:\csvFiles\DeptIdName.csv is completed 5 total CSV file records. 5 unique Department Names to import. 3 imported records. 2 rejected records. 



14. You can proceed with User Import.Click on the **Continue with User Import** button.**Locate Files** screen appears.

Enter the Path to the User CSV file, or click on the **Browse** button to find it. The path to the TAPIT Database is saved from the Department Import and should not be changed.

, TAPIT Import Wizard 1.0.23		>
Locate Files		
	USERS IMPORT (following the Departments	: Import)
	Import USERS from CSV File:	
	<ul> <li>I want to import USERS from the same file used to import D (C:\csvFiles\UserDeptName.csv)</li> </ul>	EPARTMENTS
	OR, enter the path to the csv file or click on 'Browse' to find it.	
	C:\csvFiles\UserDeptName.csv	Browse
	Import TO TAPIT Database (tapitab.mdb) File:	
	Enter the path to the TAPIT database (tapitdb.mdb) file or click on 'Browse' to	find it.
	C:\TapitW/32\DATA\MAIN\tapitdb.mdb	Browse
Cancel	<< Back Next >>	Einish



# 15. Click on Next.

Column Headers screen comes up.

This screen is different from what you have seen when importing Departments. **Associate Users with Departments** part has been added. Since we have imported both Department Names and Department Ids, we need to select one of them to associate Users with Departments. The selection depends on what field is listed in the User csv file. Our file contains Department Ids. We are going to associate Users with Departments via Department Id.

Column Hea	iders						
	USERS IMPO	RT (following the D	epartments Imp	port)			
Examples of CSV files							
Using Departm Users	ent Name field to as with Departments	isociate	Using Departme Users wi	ent ID field to associate the second s	ciate		
Associate Users wit	th Departments						
elect one of the fol	lowing TAPIT fields (	to associate lisers m	ith Department	c .			
	nowing the fit needs to	to associate oscis w	ich Deparchiene				
Department Name	Select this option if your 0	CSV file lists Users with the c	orresponding to them	Department NAMES.			
Department Id	Select this option if your 0	CSV file lists Users with the c	orresponding to them	Department IDs.			
Does the hist for e	Sample Tex	t File Data (max 10)	) records show	n)			
	Sample Tex	t File Data (max 10)	D records show	n)			
ext2	Sample Tex surcharge per Minute	<b>t File Data (max 10</b> surcharge per Call	D records show	n ) dept no.	1		
ext2 2831 2832	Sample Tex surcharge per Minute	<b>t File Data (max 10</b> ) surcharge per Call	D records show	n) dept no.	1		
ext2 2831 2832 2832 2832	Sample Tex surcharge per Minute 0.2	t File Data (max 100 surcharge per Call	D records show	n) dept no.	1		
ext2 2831 2832 2833 2834	Sample Tex surcharge per Minute 0.2	t File Data (max 100 surcharge per Call	D records show	n) dept no.	1 1 2 2		
ext2 2831 2832 2833 2834 2835	Sample Tex surcharge per Minute 0.2	t File Data (max 100 surcharge per Call	D records show	n) dept no.	1 1 2 2 2 2		
xxt2 2831 2832 2833 2834 2835 2836	Sample Tex surcharge per Minute 0.2	t File Data (max 100 surcharge per Call	D records show	n) dept no.	1 1 2 2 2 2 3		
xxt2 2831 2832 2833 2834 2835 2836 2836 2836 2837	Sample Tex surcharge per Minute 0.2	t File Data (max 100 surcharge per Call	D records show	n) dept no.	1 1 2 2 2 3 3 3		
xxt2 2831 2832 2833 2834 2835 2836 2836 2837 2838	Sample Tex surcharge per Minute 0.2	t File Data (max 100 surcharge per Call	D records show	n) dept no.	1 1 1 2 2 2 2 2 3 3 3 3 4		
ext2 2831 2832 2833 2834 2835 2836 2837 2838 2838 2838 2838 2838 2838 2838	Sample Tex surcharge per Minute 0.2	t File Data (max 10) surcharge per Call	D records show	n) dept no.	1 1 2 2 2 3 3 3 4 4 4		
ext2 2831 2832 2833 2834 2835 2836 2837 2838 2838 2838 2838 2838 2838 2838	Sample Tex surcharge per Minute 0.2	t File Data (max 10) surcharge per Call	D records show	n) dept no.	1 1 1 2 2 2 3 3 3 4 4 4 4 4		
ext2 2831 2832 2833 2834 2835 2836 2837 2838 2837 2838 2838 2838 2838 2838	Sample Tex surcharge per Minute 0.2 \$0.05	t File Data (max 10) surcharge per Call	D records show	n) dept no.	1 1 1 2 2 2 3 3 3 4 4 4 4 4		
ext2 2831 2832 2833 2834 2835 2836 2837 2838 2868 8774 48013	Sample Tex surcharge per Minute 0.2 \$0.05	t File Data (max 10) surcharge per Call	D records show	n) dept no.	1 1 2 2 2 3 3 3 4 4 4 4 4		

### 16. Does the first row contain headers?

Check this option if the first line of your CSV file contains TEXT fields names.

Does the first row contain header?

The Department CSV, used in our example, contains headers (see **Format of a Department CSV file** section above, the example of CSV file, line 1). If your CSV file does not have headers it is recommended to create them. Having column names makes it easier to match TAPIT fields with the Text file columns.



### 17. Click on **Next**.

The Match Fields screen appears.

This screen lets you match TAPIT fields with the corresponding TEXT fields.

TAPIT Import Wizard 1.1	1.0						<u> </u>
Match Fie	elds						
	U	SERS IMPORT	(following th	e Depart	ments Import)		
Records to IMPORT:		Sample Text F	ile Data (ma	x 100 rec	ords shown)		
17	first	last	auth		ext1	e	<mark>xt2</mark> ▲
	David	McDonald				2830	
	Hellen	Smith				2830	
STEP 1	Joe					2828	
Select an item from	Larru	Jones				2827	<u> </u>
"Lext File Columns"							<u> </u>
corresponding field							
name from 'Tapit	Tanit Dat	tahase Fields	Match F	ields	Text File Colum	ns	
Database Fields' list.	Lleer Extension				Texer ne colum	15	
STEP 2	User Extension			ext2			
Click on the 'Add	TAPIT 'DEPART	MENT ID' field h	as to be mat	ched with	the correspondin	g field in	a
matched' button		text file to as	sociate User	's with De	partments		
to save this		dd matched	fields to t	he Imn	ort list		
selection for Import.		aa matemea		ine mip	oremat		
nepeat steps 1, 2 until all fields are	Department Id		=	dept no.			
matched.	User First Name		=	first			
	User Last Name		=	last			
Each Tapit Field,	User Authorization	Code	=	auth			
except Extension	User Surcharge Pe	r Minute	=	surcharge	per Minute		
Can be matched with	User Surcharge Pe	er Call	=	surcharge	per Call		
Column.	User Multiplier (per	cent)	=	multiplier			
	User Extension		=	ext1			
	User Extension		=	ext2			
Extension Field							
is a required field	•						
		Remove i	tem from	the Imp	ort list		
· · · · · · · · · · · · · · · · · · ·					1	1	
Cancel	<<	Back	Next	>>	Finis	h	

18. Select a TAPIT field from **TAPIT Database Fields** and then a corresponding item from **Text File Columns** list box.

Tapit Database Fields	Match Fields	Text File Columns	
User Extension	💌 💳 [ext2		•

19. Click on Add matched fields to the Import List.

Add matched fields to the Import list

The matched fields appear on the **Import List**.



	Tapit Database Fields Ma	tch Fi	elds	Text File Columns		
Use	r Extension	💌 = 🖻	xt2	•		
TAPIT 'DEPARTMENT ID' field has to be matched with the corresponding field in a text file to associate Users with Departments						
Add matched fields to the Import list						
	Department Id	=	dept no.			
	User First Name	=	first			
	User Last Name	=	last			
	User Authorization Code	=	auth			
	User Surcharge Per Minute	=	surcharg	e per Minute		
	User Surcharge Per Call	=	surcharg	e per Call		
	User Multiplier (percent)	=	multiplier			
	User Extension	=	ext1			
	User Extension	=	ext2			

# WHEN MATCHING USER FIELDS

The field associating Users with Departments has to be matched. In our case it is the Department Id field.

**User Last Name** has to be included in the **Import List**. This TEXT field (column) cannot be empty.

TAPIT **User Extension** is the only field that can be matched with multiple TEXT fields (columns). User can have multiple extensions.

All other TAPIT fields can be matched with only one TEXT field (column).


20. When all fields are matched, click on **Next**.

, TAPIT Import Wizard 1.1.			
Import			
F			
	Departments Import)		
IMPORT	Table Database Fields	IMPORT LIST	
Import Winnerte	l apit Database Fields	Text File Columns	
data the way it is	Department Id	= dept no.	
matched in the Import	User First Name	= first	
List.	User Last Name	= last	
Data from the Text	User Authorization Code	= auth	
File Columns is	User Surcharge Per Minute	<ul> <li>surcharge per Minute</li> </ul>	
imported to the	User Surcharge Per Call	= surcharge per Call	
corresponding Lapit	User Multiplier (percent)	= multiplier	
ricius.	User Extension	= ext1	
If you need to edit	User Extension	= ext2	
the IMPORT LIST			
click on the '< <back'< th=""><th></th><th></th><th></th></back'<>			
button to go back to			
the 'Match Fields'			
the Import List items.			
TO IMPORT NOW			
click on the 'Finish'			
button.			
			▶
			1
Cancel	<< Back	Next >> Finish	

This screen displays the final field selection from import.

TAPIT Import Wizard imports data the way it is matched in the **Import List**. If you need to edit the **Import List**, click on the **Back** button to go back to the **Match Fields** screen. **Add** or **Remove** rows from the **Import List** using the **Add matched fields to Import list** or **Remove item form Import list** buttons. Otherwise, click on **Finish** to import.

21. When import is completed a confirmation message appears.

ImportTapit	×
Import Completed. Please see Import.Log for mo	ore information.
OK	





## TapitNOVA Import Utility Manual

#### 22. The Import screen changes.



Top of the Import screen displays Import statistics.

Following example below – the CSV file contained 17 total TEXT records, 12 TEXT records were successfully saved (imported) into the TAPIT Database. 5 TEXT records were rejected (were not imported).



23. To find out more about rejected records click on the **View Import Log File** button.



The log file contains two parts: the Department part and the Users part.





Department ld = dept no.	(Field8 Deptld)
User First Name = first	(Field0 UserFirstName)
User Last Name = last	(Field1 UserLastName)
User Authorization Code = auth	(Field2 UserAuthCode)
User Surcharge Per Minute = surcharge per	(Field5 UserSurchargePerMinute)
Minute	
User Surcharge Per Call = surcharge per Call	(Filed6 UserCallSurcharge)
User Multiplier (percent) = multiplier	(Field7 UserMultiplier)
User Extension = ext1	(Field3 Extension)
User Extension = ext2	(Field4 Extension)
***************************************	*******

# (why records were rejected rec # matches the record number in a rejected file csv)

\*\*\*Rejected rec # 1\*\*\*Extension: "2830" already exists in a database and has not been saved in TAPIT

\*\*\*Rejected rec # 2\*\*\*last is empty. This is a required field in User table and cannot be left empty.

\*\*\*Rejected rec # 3\*\*\*Extension: "A143" contains illegal characters. Only digits are allowed and has not been saved in TAPIT

\*\*\*Rejected rec # 4\*\*\*auth: "401885" already exists in TAPIT database, User table \*\*\*Rejected rec # 5\*\*\*auth: "99\*\*#8 " contains illegal characters. It can only contain digits and letters.

#### (Import statistics)

Import to the User table from file C:\csvFiles\UserDeptName.csv is completed 17 total CSV file records.

12 imported records.

5 rejected records.

24. To view rejected records click on the View Rejected Records CSV File button.

View Rejected Records - File: 022805122917\_Rejected.csv



022805122917\_Rejected.csv file is located in: C:\Program Files\Tapit Import\LogFiles\ folder.



X

25. The following screen opens up. Click on **View File**.

To Revise the Rejected Records file:

STEP 1 Click on the 'Instructions' button. The 'Instructions.txt' file contains guidelines on how to correct the Rejected Records file.

#### STEP 2

Click on the 'View File' button to open the rejected records file. Follow the guidelines from 'Instructions.txt' file and revise this file.



The Rejected Records csv file opens in Notepad. The below is the Rejected Records file produced by our example import (how it is displayed in Notepad). The entries in bold are the entries to be corrected – the log file above has a list of these entries and information on what needs to be corrected.

The first row of our rejected file is the headers. The Rejected Records file headers reflect headers used originally in our CSV import file.

"Rec Number","last","dept no.","first","surcharge per Minute","surcharge per Call","multiplier","auth","ext1","ext2"

```
"1","Smith","1","Hellen","0.2","","","2830","2832"
```

"2","","2","Joe","","","","","2828","2833"

"3","Constant","3","Daniel","","","","","A143","2836"

"4","Dill","5","Connor","","","401885","","48014"

"5","Chuang","5","Daniel","","","99\*\*#8","","48017"

The same Rejected Records file after corrections: "Rec Number","last","dept no.","first","surcharge per Minute","surcharge per Call","multiplier","auth","ext1","ext2" "1","Smith","1","Hellen","0.2","","","2855","2832" "2","Brown","2","Joe","","","","2828","2833" "3","Constant","3","Daniel","","","4143","2836" "4","Dill","5","Connor","","","","401995","","48014" "5","Chuang","5","Daniel","","","41998","","48017" The Rejected Records file needs to be saved in Notepad under the same name.

26. Now you can import rejected records again by clicking on **Import Revised Rejected Records CSV File**.

Import REVISED Rejected Records CSV File



27. If you have corrected the Rejected Records file and saved under the same name (overwritten) then click on **OK** to continue.

Tapit Import
This action will IMPORT C:\Program Files\Tapit Import\LogFiles\022805122917_Rejected.csv file to TAPIT. If you have revised 022805122917_Rejected file and saved changes under the same name and path (C:\Program Files\Tapit Import\LogFiles\022805122917_Rejected.csv) then click on OK. Otherwise click on CANCEL and open the file for correction using the 'View Rejected CSV File' button.
Cancel

28. TAPIT Import Wizard will import records from the Rejected Records file. When import is finished it will display the following message:

Tapit Import	×
Import Completed. Please see Import.Log for mo	re information.
(OK)	

Click on **OK**.



29. The Import screen changes to reflect the new import results (import from Rejected Records csv file).

In our example:

"Total text (csv) records: 5" – total number of text records in the Rejected Records csv file.

"Total records imported to 'User' table:"5 – the number of text records from the Rejected Records csv file imported to TAPIT.

"Total records rejected: 0" – the number of rejected records. This number should be 0 if all of the problems have been corrected in the Rejected Records csv file.

TAPIT Import Wizard 1.1.0		<u>- 🗆 ×</u>
Import		
USERS	S IMPORT (following the Departments Import)	
Total text (csv) records: 5	Total records imported to 'User' table: 5 Total records rejected: 0	
Import Log File Click on the "View Import Log File"	View Log Information - File: 022805122917_Log.log	
button to view this file in the Notepad.exe application. Log file contains general information about the Import Wizard. This file has a record of errors and description of rejected records.	View Import LOG File 022805122917_Log.log file is located in: C:\Program Files\Tapit Import\LogFiles\ folder.	
Rejected Records File	There are no rejected records - the csv file has not been created View Rejected Records CSV File	
Click on the View Rejected Records CSV File' button to view this file in the Notepad.exe All records rejected by the Import Wizard are saved into this file in a CSV format. The Import Log file contains descriptions of errors associated with each rejected record. You can import rejected records again		
after you revise the Rejected Records CSV file. Please click on 'How to revise Rejected Records file' button for instructions.		
Cancel	<< Back Next >> Finish	

User and Department data is ready to be imported to TAPIT NOVA.



### Step 2 – Run Upgrade TAPIT Task in TAPIT NOVA

IMPORTANT: If you have Remote Manager, and you want to import data for more than one location, you need to repeat import process for each location. Import process has two steps. First step is getting data from CSV files Import Ready using Tapit Import. Second step is running Upgrade Tapit task in TAPIT NOVA. Both steps have to be completed for one location at time.

CSV file data has to be run through TAPIT Import before it is transferred to TAPIT NOVA via the Upgrade TAPIT task. If you have not done it yet, see section STEP 1 - CONVERT CSV FILES TO IMPORT READY DATA.

Upgrade TAPIT NOVA task transfers the Import Ready CSV data into TAPIT NOVA.

- 1. Log in to TAPIT NOVA.
- 2. Click on the **System** button.
- 3. Click on the **Tasks** tab.
- 4. Select **Upgrade TAPIT** task from the **Create a new Task** list.

System	Locations	Tasks	Security
Create a ne	w Task 📃 💌	Schedu	uled Tasks   Running Tasks   Task Log
Schedul When d	le a Datab o you wan	ase Up It this f	grade task to run?
🖲 Run On	ice		
Start Time: 15:19:29			
Next	Cancel		

- 5. Accept default current time to run this task at once. Click on **Next**.
- 6. If you have purchased Remote Manager, select a location name you are currently upgrading from the **Pick the location you wish to upgrade** list. Otherwise, accept default Main location.

Enter a path and a file name of the TAPIT database containing ready for import data transferred from the CSV files into the **Select access database file you wish to upgrade** field. The path to this database is C:\Tapit Nova\Tapit Import\data\tapitdb.mdb folder (assuming Tapit Import is installed on the C drive).



## TapitNOVA Import Utility Manual

Schedule a Select a Lo	ask 🔽 Schedule a Database Upg ocation To Upgr	d Tasks   Running Tasks   T rade ade	ask Log
Current Upgrac	led Locations		
Name	Date	Loaded Calls	Status
Main	1/1/1900-12	00:00 AM 0	
	n you wish to upgrad	e	
Pick the locatio	ss database file you w	ish to upgrade	

7. Fill out the email information and click on **Finish**. The task has been scheduled and starts running right away.

An email message will be sent by the system to the recipient's email address from the **To** field once the task is completed.

System	Locations	Tasks	Security	/	
Create a ne	ew Task 📃 💌	Sched	uled Tasks	Running	Tasks   Task Lo
Schedu Email R ** Separate	<b>le a Datab</b> a <b>esults</b> multiple email ad	a <b>se Up</b> dresses by	<b>grade</b> / semicolons	; (;)	
то:					
recipient@	trisys.com				
BCC:					
Subject:					
Old Calls v	were loaded in th	ne new Ta	pitNova dat	abası	
Message:					
Have a 1	nice day!			*	
Previous	Finish	Cancel			



 Click on the Running Tasks link. The Upgrade task is listed on the Currently Running Tasks list. If the Upgrade task is not listed, it is already completed. You can verify that by checking the Task Log.

Task Log has a list of all completed tasks.

Create a new Task		d Tasko I. Rumpi	ag Taoko I T	ock Log		
Currently Running Tasks						
Location	Task	Started	Elapsed	Status	% Complete	
Main	UPGRADE	00:00:00	00:00:04	Importing data from Calls	1%	

9. To view upgrade details, click on the UPGRADE task on the **Currently Running Tasks** list. The **Active Task Detail** screen appears.

Syster	n Locations	Tasks	Security						
Create	a new Task	Schedul	ed Tasks   !	Running Task	<u>(s</u>   Task Log				
Activ	Active Task Detail								
Task St	atus								
LocID	Process Name	Status							
0	UPGRADE	Importing da	ata from Calls						
Progres	s								
Counte	er Counter Max A	vg Recs/Sec	Avg Secs/R	ec Elapsed Tir	ne Estimated R	un Time Last Msg By Client	Last Msg By Server		
1400	46070 1	00 (	0.01	00:00:14	00:07:40	1/23/2010 5:58:46 Pf	M 1/22/2010 3:29:25 PM		
Warning	g (Code = 0) / E	rrors (Code <	<> O)						
CodeM	lessage								
0									
Ctata									
Activo	Compl	ata Va		Eton					
ACUVE	Comp	ete vei	niy	Stop					
1	U	1		U					
Refre	sh Verify	Stop Tas	k Ret	urn to Active	Tasks				

The **Task Status** section displays description of the task.

The **Progress** section displays current information about the running task **Counter** – how many call records have been imported so far.

**Counter Max** – the total number of call records to be imported.

**Avg Recs/Sec** – how many records per second are being imported.

Avg Secs/Rec – how many seconds it takes to import one call record.

**Elapsed Time** – how much time has passed since the start of upgrade.

Estimated Run Time – approximately how long the upgrade will take.

The **Warning** section displays warnings and errors.

To see updated **Task Details** click on the **Refresh** button.



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If the task appears to be "hung" and you are not certain that the task is working, click on **Verify** and then click on **Refresh** to see the current status.

If for some reason you need to stop the task click on the **Stop Task** button. However, this is not recommended, because it can produce unpredictable results in call data.

To go back to the **Currently Running Tasks** list click on **Return to Active Tasks**.

 Once upgrade task is completed it will disappear from the Currently Running Tasks list. You will be able to find it on the Tasks – Completed list located on the Task Log tab.

Tasks - Completed

Started 🗘	Ended 😂	Task ≑	User ≑	Freq. 🗘	Loc. 🗘	Message	Status 🗘
01/23/10 17:58	18:03	UPGRADE			0		Complete

11. If you have more than one location to upgrade (if you are upgrading old Tapit with Remote Manager), you need to repeat pt 2 – 22 for each location's database.

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