



Importing spreadsheets

IMPORTING SPREADSHEETS

1. INTRODUCTION

Importing data from a spreadsheet is a key way of adding new data into the database. Two types can be added, contact data - data about clients and agents - and booking data.

When importing contact data in bulk, considerable checking is required to make sure that the data being added doesn't already exist in the database causing duplication and thereby reducing the effectiveness of the database. Consequently comprehensive routines have been provided to assist the user in avoiding inserting bad data.

Each new record is validated in turn against existing data, with the user given the opportunity to add as new data or update existing data. This is important as slight differences in company or people names will be interpreted as new data by the import program unless corrected by the user.

It is recommended that the number of records being imported is kept small, especially at first perhaps 20-30 records, to ensure that each is correctly imported. Once each import is started, it can be halted, but the importing spreadsheet has to be edited to remove the already imported data. 50 records typically takes about 5 minutes to import.

There are three steps involved in importing a spreadsheet:

- 1 First, the spreadsheet has to be formatted so that the import program can understand it
- 2 Next, the spreadsheet is imported and processed record by record
- 3 Finally an output report is produced so that a record is kept of the import decisions made by the user

2. CHECKING THE SPREADSHEET CAN BE IMPORTED

To be successfully processed, the spreadsheet must comply with the following rules:

1. Only the first worksheet in any spreadsheet can be imported, and the spreadsheet must be of Excel type with a file extension of .xls or .xlsx
2. Row 1 of the spreadsheet has to contain the column names which are used by the import program to identify the column. They don't have to be unique names but it is easier to understand if they are
3. It is preferable if there are no blank columns in the data part of the spreadsheet, or especially hidden columns. The program will find them which may confuse the user. If strange column names appear in your import, then they are probably hidden columns
4. The minimum column name is one for a company name, all others are optional
5. Single and double quote characters are dangerous to an Access database, as they are used during processing as text delineators, i.e. Access uses them to determine the beginning and end of each piece of text.

There are two types of quote characters:

- straight vertical type " and ' are the dangerous ones
- curly quotes ‘ and “ ” are quite safe.

So if a name uses straight quote characters - St. George's - or - John "Jojo" Green - for example, then without changing will cause an error but - St. George's - or - John "Jojo" Green - will not and will be accepted.

During processing, dangerous quotes are automatically changed by the import program as follows:

- The import program will ignore bad straight quotes in column names - reading the name will stop at the first quote character.
- Bad quotes in the body of the data are replaced automatically by the program. The single straight quote is replaced with the safe single curly quote character '. Double straight quotes are replaced with the safe curly double quote ", but the same one is used for both ends of the quoted passage, which may look a bit odd.

You can therefore let the program do it, or change them yourself for more control.

CLEANING THE DATA - PERSON NAME

In some databases to be imported, the person name has not been split into First name and Surname.

If this is the case with your database, then you have a bit of work to do, as the data **HAS** to be split into First name and Surname.

	A	B
1	ID	
1	ID	
2	1	Alex B. Ramsey
3	2	Rusty Chambers
4	3	Janeen "Rusty" Chambers
5		Kay Merrill
6		Jeffery DalPoggetto
7		Seta Kembikian
8		Linda Eades

This could be a mammoth cut and paste task, but thankfully, to speed it up, Excel 2013 has an algorithm which will do a lot of the work. However a problem with the algorithm is shown in this sample database, where we have 'Alex B. Ramsey' which we need to split into 'Alex B.' and 'Ramsey'. However we might also have a 'Rip van Winkle', which needs splitting into 'Rip' and 'van Winkle'. So it cannot do it all.

How it works is as follows (practice first on a copy of your live data!):

First create a series of blank columns to the right of the name column. You need as many as there are potential spaces in the names, as word is going to split the name column up into as many columns as there are spaces in the longest name. So create 4 or 5 to be safe.

Then highlight the name column by clicking on the column header 'B', then choose the menu options

DATA -> Text to columns

And the wizard will start up which will split the name column. Use the default options and it should be fine, you should end up with this:

	A	B	C	D	E	F	G
1	ID						
1	ID						
2	1	Alex	B.	Ramsey			All A
3	2	Rusty	Chambers				Andi
4	3	Janeen	Rusty	Chambers			Andi
5	4	Kay	Merrill				Andi
6	5	Jeffery	DalPoggetto				Andi
7	6	Seta	Kembikian				Andi

Now it is a quick task to cut and paste the oddball names to the correct First_name and Surname, and type in the correct column headings.

K22							
	A	B	C	D	E	F	G
1	ID	First_name	Surname	Company	Email	Potcode	Country
2	1	Alex B.	Ramsey	All Aboard Travel, Inc.	alex@allaboardtraveldallas.com	75219	USA
3	2	Rusty	Chambers	Andavo Travel	rusty.c@christophersontravel.com	84123	USA
4	3	Janeen Rusty	Chambers	Andavo Travel	rusty_chambers@andavotravel.com	84123	USA

CLEANING THE DATA - SPREADSHEET COLUMN HEADINGS

All columns in the incoming spreadsheet must have a column heading. These can be any text string recognisable to the user.

Below are the field names in the database. The incoming column heading names will be mapped by the user onto the database field names as will be explained below.

‘Mapping’ associates each incoming column with a field in the database, so when each spreadsheet record is processed, the program knows where to place the data.

A column heading which can be mapped to Company name is the only field which has to be present, the others are all optional.

Note that each incoming field can be mapped to none, one or more field names in the database. For example, the incoming City column can be mapped onto both ‘Office’ for an office name, and ‘City’ for the address.

Fields relating to companies

Id
Company
Company_type
Bio
Main_inbound_used
Second_inbound_used
Special_product
Website
Publications
Payment_terms/details
Bank_details
Market_region
Source
Brochured_by
Payment_notes
General_notes
Commission_type
Commission_level_%
Affiliation

Fields relating to offices

Office
Address_line_1
Address_line_2
Address_line_3
City
State
Postcode
Postal_address
Country
Country_code
Phone
Fax

Fields relating to people

Person_type
Special_contact_type
First_name
Surname
Salutation
Nickname
Job_title
Person_country_code
Direct_line
Mobile
Person_fax
Email
Skype_name
Additional_contact_type
Inbound_agent_used
Birthday
Spouse_name
Comment
First_meeting_date
First_meeting_place
Source
Special_rates
Accept_newsletters
Note
Action_note

3. IMPORTING SPREADSHEETS - GENERAL COMMENTS

- Note that manual intervention is required throughout the import process, so limit the import of records to 20 or 30 at a time until you are confident.
- Backup the database before every import in case it goes wrong.
- You can stop, or 'Abort' the import at any stage. A report will be produced so you know which records were successfully imported, so you can then delete these from the incoming spreadsheet and restart the import.
- The import process is a complex procedure as each new record has to be checked to see if the company and/or person is already in the database:
 - o The company or person name may well be spelled slightly differently to an existing entry, so there are options to search for similar names.
 - o If you importing data which contains more information for existing records then there is an option to update each record with the new incoming data.
- Note the difference between how *new* and *existing* records are treated by the update program. Refer back to this section when you have read the rest of the manual.
 - o New company and person records are inserted as they are in the imported spreadsheet (if you are unclear about company and person records, read the database structure section in the *proCAM* User Guide).
 - o If a company already exists in the database, and the incoming spreadsheet has a new person for that company, then the company record is unchanged and the person record is entered as a new record with the data in the spreadsheet.
 - o If a company and a person in the incoming spreadsheet already exists in that combination in the database, then nothing is changed regardless of the incoming data.
 - o In all cases, if a general note or action is included with the import, then this is added regardless of whether the incoming data is new or existing.

In options 2 and 3 when the person is selected, if the 'Use with update' option is used then the data in the incoming record can be used to update the existing information in the spreadsheet company and person records.



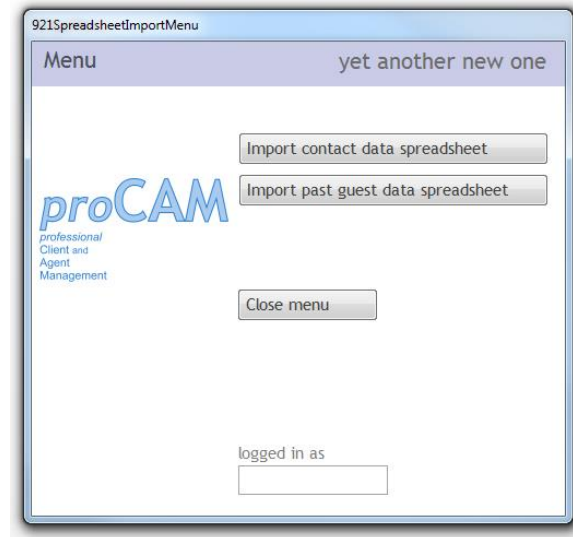
Sections marked with the star are worth noting

4. RUNNING THE IMPORT SPREADSHEET FEATURE - THE IMPORT PROCESS



BACKUP the database before every import! You will be asked when you click the ‘Import spreadsheet’ button.

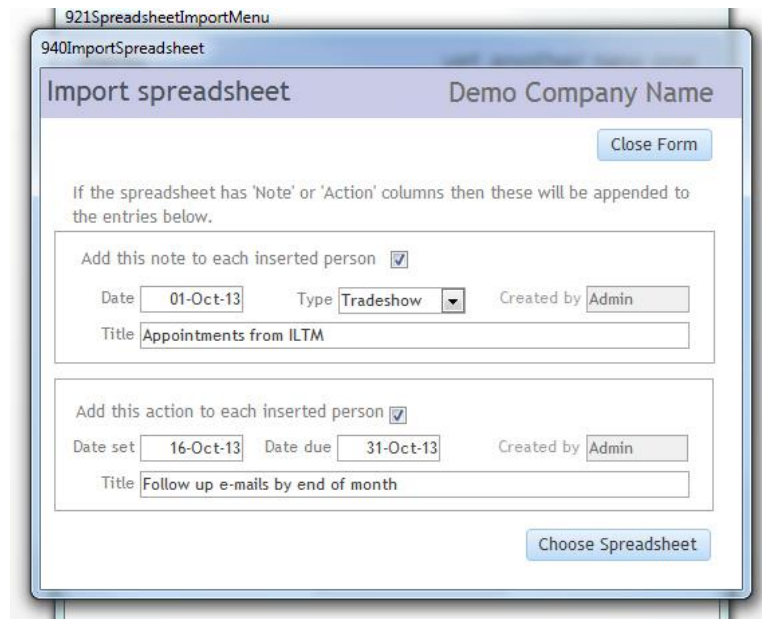
From the Tourism Database main menu, click the “Import” button. The Import menu is displayed:



Choose whether you are importing Contact data (agents etc.) or Past guest data (bookings)

IMPORTING CONTACT DATA

This form is where you set up standard notes and actions to be appended to each person record imported into the database.



The screenshot shows a web application window titled '921SpreadsheetImportMenu' with a sub-header '940ImportSpreadsheet'. The main form is titled 'Import spreadsheet' and 'Demo Company Name'. It includes a 'Close Form' button in the top right. Below the title, a note states: 'If the spreadsheet has 'Note' or 'Action' columns then these will be appended to the entries below.' The form contains two sections for configuring data to be added to each imported person record. The first section, 'Add this note to each inserted person', has a checked checkbox, a 'Date' field set to '01-Oct-13', a 'Type' dropdown menu set to 'Tradeshaw', a 'Created by' field set to 'Admin', and a 'Title' field containing 'Appointments from ILTM'. The second section, 'Add this action to each inserted person', also has a checked checkbox, a 'Date set' field set to '16-Oct-13', a 'Date due' field set to '31-Oct-13', a 'Created by' field set to 'Admin', and a 'Title' field containing 'Follow up e-mails by end of month'. A 'Choose Spreadsheet' button is located at the bottom right of the form.

If the item is 'ticked' the entries made in the Note and Action area will be added to each person added or updated in the database, so if required make entries that are suitable to the data being imported.

When ready, click the Choose Spreadsheet button.

MAPPING COLUMNS BETWEEN THE SPREADSHEET AND THE DATABASE

There are many options on this form, and at first it may seem confusing. However once it is understood it is very easy to use.



If you forget some of the details, click the Help button for a summary of the features. You can keep the help form open while you use the mapping form.

1. Choose a spreadsheet to import.

Click the 'Choose spreadsheet to import' button and navigate to find the relevant spreadsheet. You will only be able to 'see' .xls or .xlsx spreadsheet files, and also to import only the first datasheet in a file.

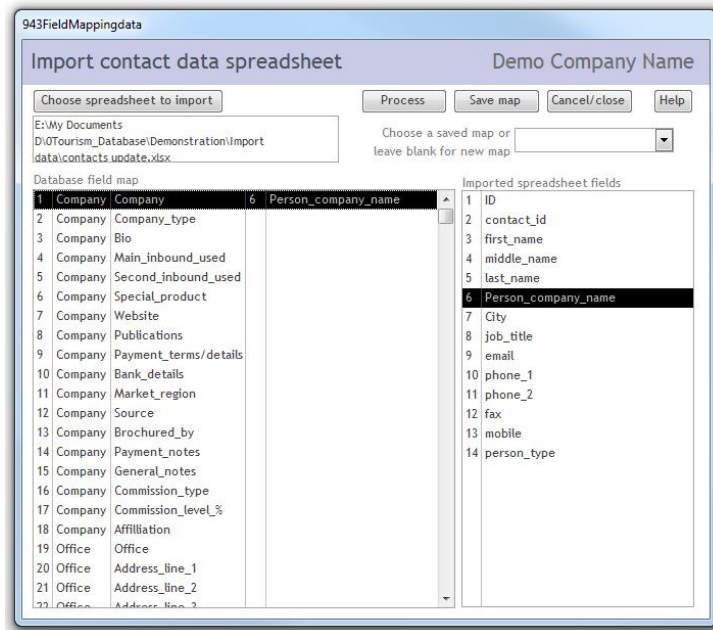
Once you have found a suitable file, the import spreadsheet fields will appear in the right hand column, and the database fields available for mapping appear in the left hand column.

The screenshot shows a software window titled '943FieldMappingdata' with a subtitle 'Import contact data spreadsheet' and 'Demo Company Name'. The interface includes several buttons: 'Choose spreadsheet to import', 'Process', 'Save map', 'Cancel/close', and 'Help'. A text box shows the file path 'E:\My Documents\D:\0Tourism_Database\Demonstration\Import\data\contacts update.xlsx'. Below this is a dropdown menu labeled 'Choose a saved map or leave blank for new map'. The main area is divided into two columns: 'Database field map' on the left and 'Imported spreadsheet fields' on the right. The 'Database field map' column lists 22 items, each with a number, a type (Company or Office), and a field name. The 'Imported spreadsheet fields' column lists 14 items, each with a number and a field name.

Database field map		Imported spreadsheet fields	
1	Company Company	1	ID
2	Company Company_type	2	contact_id
3	Company Bio	3	first_name
4	Company Main_inbound_used	4	middle_name
5	Company Second_inbound_used	5	last_name
6	Company Special_product	6	Person_company_name
7	Company Website	7	City
8	Company Publications	8	job_title
9	Company Payment_terms/details	9	email
10	Company Bank_details	10	phone_1
11	Company Market_region	11	phone_2
12	Company Source	12	fax
13	Company Brochured_by	13	mobile
14	Company Payment_notes	14	person_type
15	Company General_notes		
16	Company Commission_type		
17	Company Commission_level_%		
18	Company Affiliation		
19	Office Office		
20	Office Address_line_1		
21	Office Address_line_2		
22	Office Address_line_2		

2. Begin mapping fields.

Click first on an Import spreadsheet field, e.g. Person_company_name and then on the field you want to map to, Company.

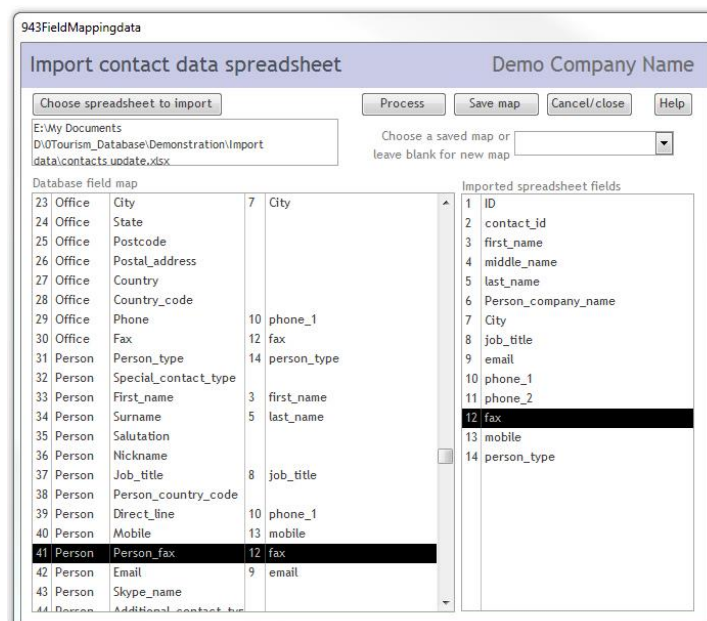


These fields are now mapped. Note that it is the number of the column in the imported spreadsheet which is mapped, in this case the 6th column, not the name itself, which is just used as a reference for your use.

If the Imported field name contains invalid quote characters, the name will not display correctly when mapped. This is OK, it is the column number which is used to map the field.

This is really of relevance when using saved maps, more of which later.

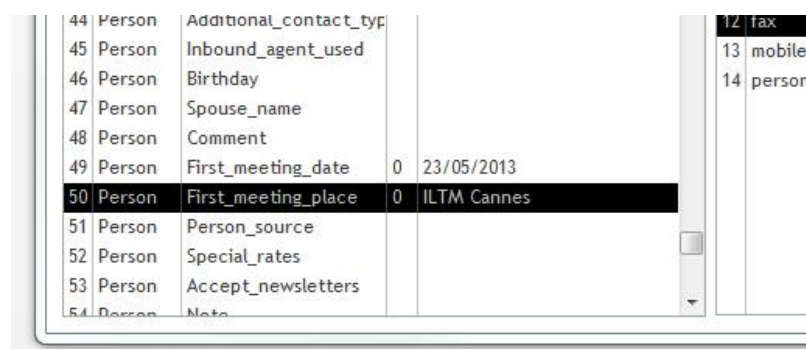
Continue mapping fields until you have mapped all you require.



Notes:

- Fields can be mapped more than once. For example here the phone numbers have been mapped both into the Office phones as well as the Person phones
- If you make a mistake, click on the wrongly mapped field in the Database field map, and you will be asked if you wish to delete the map.
- Text can be entered, and it will be placed in each *new* record inserted into the database. For example this might be a spreadsheet resulting from contacts made at the ILTM trade show, in which case we would want to put, for example 'ILTM Cannes' in the first meeting place, and 23/05/13 as the first meeting date.

Click on a *blank* Database field map, for example 'First_meeting_place' and you will be asked to enter some text to be placed in all new contacts, so enter ILTM Cannes, and that will be placed in the map. Note that text entry has a field number of 0.

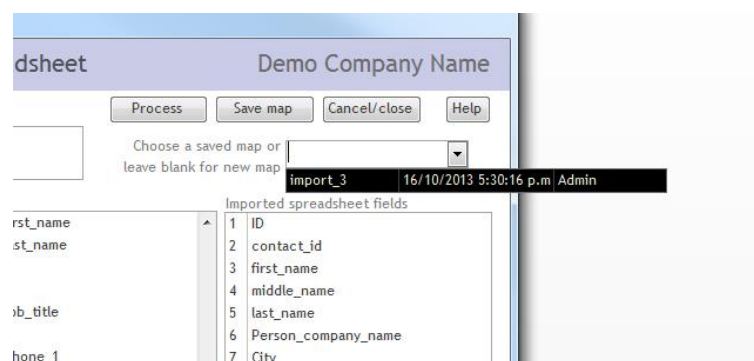


44	Person	Additional_contact_type	
45	Person	Inbound_agent_used	
46	Person	Birthday	
47	Person	Spouse_name	
48	Person	Comment	
49	Person	First_meeting_date	0 23/05/2013
50	Person	First_meeting_place	0 ILTM Cannes
51	Person	Person_source	
52	Person	Special_rates	
53	Person	Accept_newsletters	
54	Person	Note	

3. Saving an import map

- Instead of having to map each time the same layout spreadsheet is import, the map can be saved by clicking the Save map button and providing a name.

When the same spreadsheet layout is to be imported again, the map can be chosen from the drop down box.



dsheet Demo Company Name

Process Save map Cancel/close Help

Choose a saved map or leave blank for new map

import_3 16/10/2013 5:30:16 p.m Admin

Imported spreadsheet fields

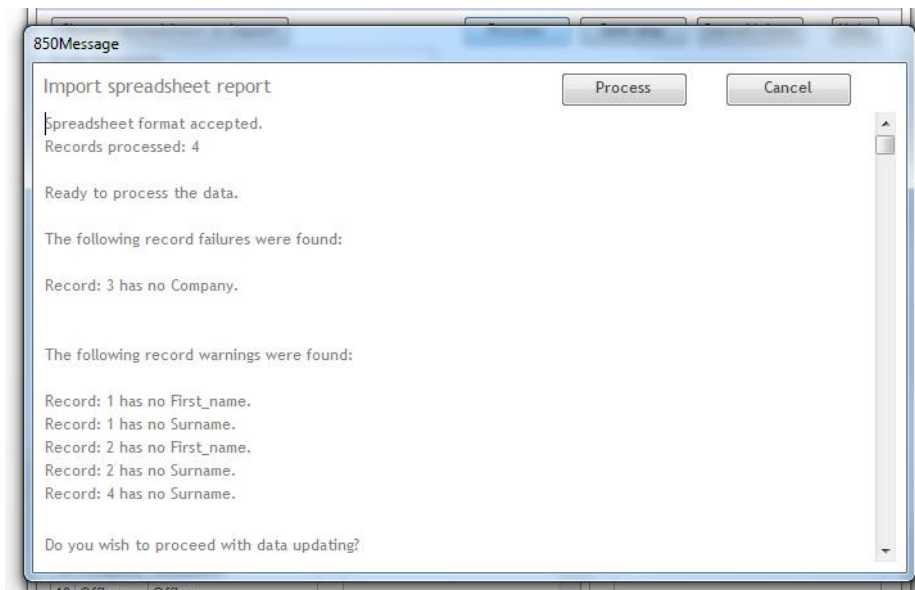
1	ID
2	contact_id
3	first_name
4	middle_name
5	last_name
6	Person_company_name
7	City

This is where the column number is important. The newly imported spreadsheet has to have the same *layout* i.e. the columns must be in the same sequence, not necessarily have the same *column headings* as the saved map.

Note that a saved map can be amended each time it is used, for example the show might not be ILTM this time, but TRENZ. In which case click on the First_meeting_place, delete the map, then click on the newly blank First_meeting_place and enter TRENZ.

4. Process

When you have completed the mapping, click the 'Process' button. The import program will now check through all the data in the spreadsheet and show the following form:



Record failures are records which will not be imported for the reason given.

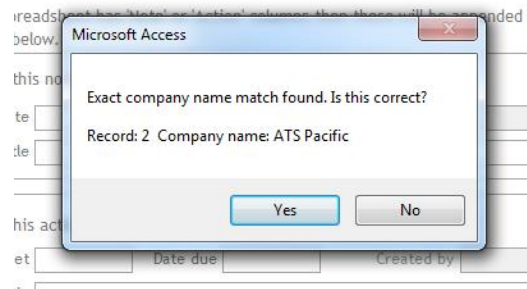
Record warnings are for records which will be accepted, but are not quite right, e.g. they have been changed by the import program for bad quotes for example, or have no first name or surname.

Click the 'Process' to proceed, or 'Cancel' to stop the import so you can amend the spreadsheet.

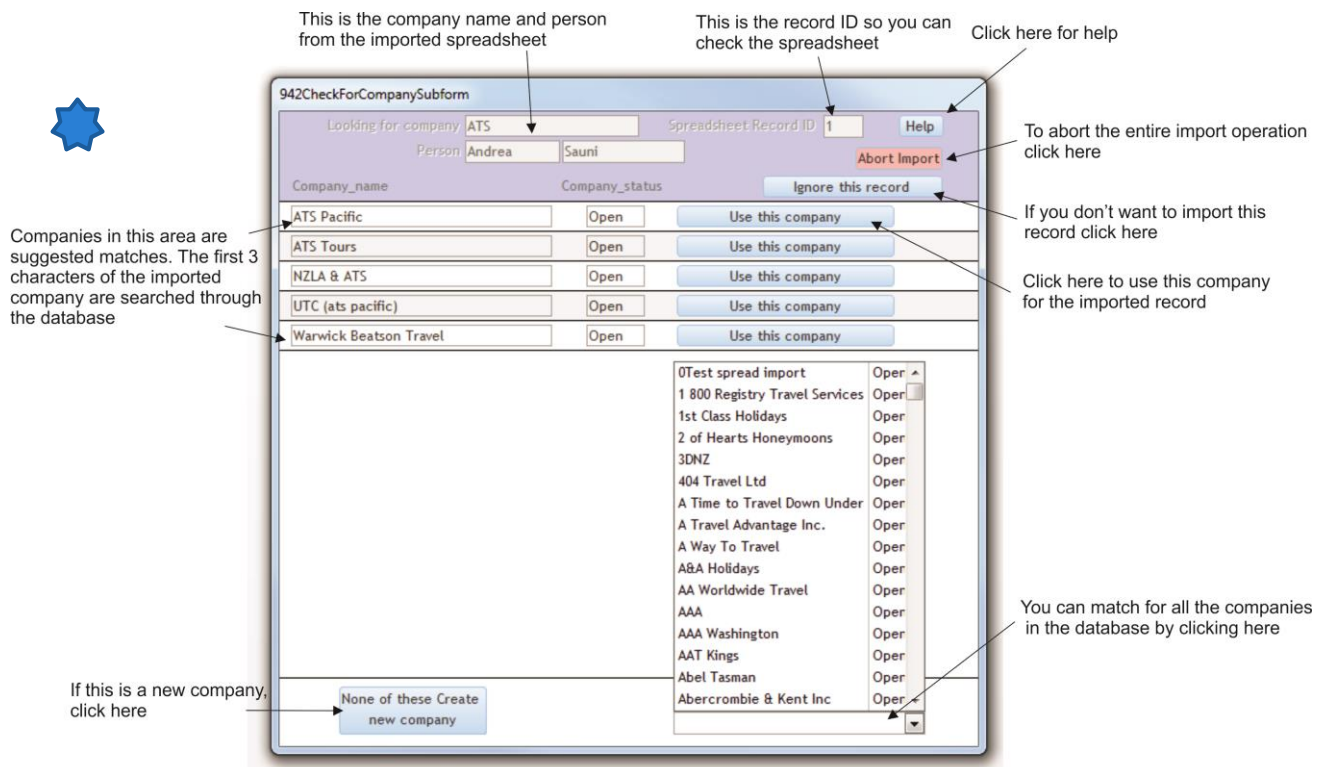
IMPORT PROCESS - COMPANY

The import process opens the spreadsheet record and checks whether the company name exists in the database already.

Each import form has a 'Help' button, click this for a reminder of what to do



If an exact match on company name is found, the process moves on to importing the person, otherwise the following is displayed:



Notes:

- You can match with a 'Closed' company record. You are then able to make it 'Open' if required.
- If an existing company is chosen, then no fields are imported from the spreadsheet relating to companies or offices are imported at this time. However you can then use the update existing data option on the next 'Check for person' form
- If the company is new then the new person record is created automatically

IMPORT PROCESS - PERSON

Once the company is established, and the company is an existing company in the database, the person match form below is displayed.

If a new company is imported above, the person is imported automatically without using this form.

The screenshot shows a web form titled "941CheckForPersonSubform". It has a header section with "Looking for:" and "In company:" fields. Below this is a table with columns "First_name", "Surname", and "Status". To the right of the table are two buttons: "Use this person" and "Use with update". At the bottom of the form, there is a "None of these. Create new person in this company" button and a "Choose an office for the new person" dropdown menu with a "Create new" button. Annotations with arrows point to various parts of the form:

- "This is the company name and person from the imported spreadsheet" points to the "Looking for:" field.
- "This is the record ID so you can check the spreadsheet" points to the "Spreadsheet record ID" field.
- "Click here for help" points to the "Help" button.
- "To abort the entire import operation click here" points to the "Abort Import" button.
- "If you don't want to import this record click here" points to the "Ignore this record" button.
- "Click here to use this person for the imported record" points to the "Use this person" button.
- "Click here to use this person for the imported record **and** to update any existing data as part of the import process" points to the "Use with update" button.
- "People in this area are the existing people for this company" points to the table of existing people.
- "If this is a new person click here" points to the "None of these. Create new person in this company" button.
- "If it is a new person, you enter the office here (it appears when you click 'New person')" points to the "Choose an office for the new person" dropdown menu.

Notes:

- If the 'Use this person' option is selected, then the only fields imported from the spreadsheet are special notes or action text. A Standard note or Action (i.e. those entered on the very first form to be appended to all records) is appended to the person selected.
- If the 'Use with update' option is selected then the opportunity is provided to update existing data with the incoming data.



IMPORT PROCESS - PERSON - UPDATE EXISTING DATA

This option is used if there is some additional or more recent data on the incoming data record.

Choose whether to update Company, Office or Person data

This is the company name and person from the imported spreadsheet

This is the record ID so you can check the spreadsheet

When you have finished updating data click here

Click here for help

This is all the existing data for Andrea Sauni, and we have no e-mail for her

This is ALL the incoming data, including an e-mail address for Andrea Sauni

945UpdateExistingData

Company data Office data Person data Company ATS Pacific

Andrea Sauni Update Cancel

41 Special_contact_ty	
42 First_name	Andrea
43 Surname	Sauni
44 Salutation	
45 Nickname	
46 Job_title	
47 Person_country_co	
48 Direct_line	
49 Mobile	
50 Person_fax	
51 Email	
52 Skype_name	
53 Additional_contact	
55 Birthday	
56 Spouse_name	
57 Comment	
58 First_meeting_date	
59 First_meeting_place	
60 Source	
61 Special_rates	

Imported data

1 ID	1
2 First_name	Andrea
3 Surname	Sauni
4 Company	ATS
5 Email	andrea@atspacific.co.nz
6 Note	

new company

945UpdateExistingData

Company data Office data Person data Company ATS Pacific

Andrea Sauni Update Cancel

41 Special_contact_ty	
42 First_name	Andrea
43 Surname	Sauni
44 Salutation	
45 Nickname	
46 Job_title	
47 Person_country_co	
48 Direct_line	
49 Mobile	
50 Person_fax	
51 Email	
52 Skype_name	
53 Additional_contact	
55 Birthday	
56 Spouse_name	
57 Comment	
58 First_meeting_date	
59 First_meeting_place	
60 Source	
61 Special_rates	

Imported data

1 ID	1
2 First_name	Andrea
3 Surname	Sauni
4 Company	ATS
5 Email	andrea@atspacific.co.nz
6 Note	

First click on the incoming data

Then click on what you want to update in the existing data. This can be an empty field, or overwrite existing data

945UpdateExistingData

Company data Office data Person data Company ATS Pacific Close Form Help

Andrea Sauni Update Cancel

41	Special_contact_ty	
42	First_name	Andrea
43	Surname	Sauni
44	Salutation	
45	Nickname	
46	Job_title	
47	Person_country_co	
48	Direct_line	
49	Mobile	
50	Person_fax	
51	Email	andrea@atspacific.co.nz
52	Skype_name	
53	Additional_contact	
55	Birthday	
56	Spouse_name	
57	Comment	
58	First_meeting_date	
59	First_meeting_place	
60	Source	
61	Special_rates	

1	ID	1
2	First_name	Andrea
3	Surname	Sauni
4	Company	ATS
5	Email	andrea@atspacific.co.nz
6	Note	

Once you have made all the changes **to this tab** (i.e. Person data) then click the Update button

Once all the tabs have been updated click here to move to the next import record

945UpdateExistingData

Company data Office data Person data Company ATS Pacific Close Form Help

Andrea Sauni Update Cancel

41	Special_contact_ty	
42	First_name	Andrea
43	Surname	Sauni
44	Salutation	
45	Nickname	
46	Job_title	
47	Person_co	
48	Direct_line	
49	Mobile	
50	Person_fax	
51	Email	andrea@atspacific.co.nz
52	Skype_name	
53	Additional_contact	
55	Birthday	
56	Spouse_name	
57	Comment	
58	First_meeting_date	
59	First_meeting_place	
60	Source	
61	Special_rates	

1	ID	1
2	First_name	Andrea
3	Surname	Sauni
4	Company	ATS
5	Email	andrea@atspacific.co.nz

Microsoft Access

You are about to update 1 row(s).

Once you click Yes, you can't use the Undo command to reverse the changes. Are you sure you want to update these records?

Yes No

Last chance! Click Yes to accept the changes or No to reject

You can make several changes to each tab in turn before updating

You must click Update before changing the tab or you will lose the changes

IMPORT PROCESS - REPORT

Once all the records have been processed, a report is produced and saved in the reports folder with the current date and time. This can be used to check the updates made.

Spreadsheet import log

Demo Company Name

Created by Admin

Imported file name E:\My Documents D\OTourism_Database\Development\Import
spreadsheets\NZLA Trade show.xls

This Note was assigned to each updated person:

Date	Note type NZLA trade	Created by Admin
Note title NZLA Trade show April 2012		

This Action was assigned to each updated person:

Date set	Date due	Created by
Action title		

Record ID Comment

- 1 Existing company: ATS Pacific selected for imported company: ATS
- 1 Company: ATS Pacific Existing: Andrea Sauni selected for: Andrea Sauni
- 1 General import note created for: Andrea Sauni
- 2 Exact company match used: ATS Pacific
- 2 Company: ATS Pacific Office: Manukau City selected for: Andrea Lyons
- 2 New person created: Andrea Lyons ID: 1695
- 2 General import note created for: Andrea Lyons
- 3 New company created: TNZ Product Development ID: 966
- 3 New office created: No Name ID: 967
- 3 New person created: Anna Fennessy ID: 1696
- 3 General import note created for: Anna Fennessy
- 4 Exact company match used: Pan Pacific
- 4 Company: Pan Pacific Existing: Anne Marshall selected for: Anne Marshall
- 4 General import note created for: Anne Marshall
- 5 Existing company: Seasons NZ Travel selected for imported company: Seasonz
- 5 Company: Seasons NZ Travel Existing: Ariane Kuebler selected for: Ariane Kuebler
- 5 General import note created for: Ariane Kuebler
- 6 Existing company: TNZ NZ selected for imported company: TNZ
- 6 Company: TNZ NZ Office: Auckland selected for: Bjoern Spreitzer
- 6 New person created: Bjoern Spreitzer ID: 1697
- 6 General import note created for: Bjoern Spreitzer
- 7 Existing company: ATS Pacific selected for imported company: ATS
- 7 Company: ATS Pacific Existing: Bob (Yu) Udatsu selected for: Bob Udatsu
- 7 Special import note created for: Bob (Yu) Udatsu
- 7 General import note created for: Bob (Yu) Udatsu
- 8 Existing company: Seasons NZ Travel selected for imported company: Seasonz
- 8 Company: Seasons NZ Travel Existing: Carly Hislop selected for: Carly Hislop
- 8 General import note created for: Carly Hislop

Friday, 2 August 2013
11:49:06 a.m.

IMPORTING PAST GUEST OR BOOKINGS DATA

The process is identical, but simpler, to importing contact data.

As the spreadsheet is likely to be the same each time, if being extracted from a booking engine, then setting up a standard field map is a good idea.

The get the bookings analysis to work on the company form, then data must be mapped into some or all of the following fields:

Number_of_room_nights

Booking_amount

Once the map is approved, the import happens without user intervention, as basically all possible data is imported into new records.

Note that the maps are different for bookings and contact data, you only get to see saved maps for the correct type.