

Client Data System

## Volume 39: Data Import

Before data can be imported into CDS, it must be organized in a file format that can be interpreted by CDS. One file type that CDS can read is Comma Separated Value or .csv. Microsoft Excel can be used to format data and save it in .csv file format.

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1	Last Name	First Name	Gender	Marital	Street	City	State	Zip	Description	DOB	Age
2	Roberts	Randy	Male	Married	568 Harrison Ct.	Alhambra	CA	91536	Residence	8/16/1965	- 38
3	Humphries	Kaγ	Female	Married	229 Oaktree Ln.	Pasadena	CA	91106	Business	6/22/1974	29
4	Bingman	Harold	Male	Single	8596 Jefferson	Sierra Madre	CA	91056	Residence	9/1/1960	43
5	Vasquez	Paul	Male	Married	85 23rd Ave.	Glendale	CA	91682	Business	10/7/1978	25
6	O'Reily	Kate	Female	Single	745 Avenue Q Apt. 6	Studio City	CA	91065	Residence	6/27/1980	34
7	Chang	Martha	Female	Married	462 Reynaldo Place	Pasadena	CA	91106	Residence	4/16/1969	35
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Figure 1: Data organized in Microsoft Excel and saved in .csv format.

Once the data has been organized and saved in .csv format, you can create an import definition to bring the data into the group census of a business record in CDS.

To create an import definition in CDS -

- From the main screen of CDS, click on **Database** in the main menu.
- Select Utilities.
- Select Import/Export.



Figure 2: The Import/Export menu item.

• Click the Add button in the Import/Export Definitions window.

Import/Export Definiti	ons (1)	
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Figure 3: The Import/Export Definitions window.

• Select the **Comma Separated Value** option in the **Import/Export Selection Type** window.

d Value

Figure 4: The Import/Export Selections Type window.

- In the Table Names window, select Contact Information.
- CDS will display a message regarding phone and address data. When phone or address information is imported, specific fields at the bottom of the **Columns Available** section must be used and data must be organized in the .csv file to match the available phone and address columns.

Client Da	ita System X
8	When importing/exporting phone numbers or addresses from the Contact Information table, use Phone1-4 or Address1 and Address2, toward the end of the Columns Available list. Data will not be imported properly using any other phone or address columns.
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Figure	5: The phone and address information window.



- Review the information in the phone and address message and then click **OK**.
- The Import/Export Definition window will open.
- In the Import/Export Definition window, move columns out of the Columns Available section into the Columns Selected section in accordance with the order of columns in the .CSV file.

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1	Last Name	First Name	Gender	Marital	Street	City	State	Zip	Description	DOB	Age
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4	Bingman	Harold	Male	Single	8596 Jefferson	Sierra Madre	CA	91056	Residence	9/1/1960	43
5	Vasquez	Paul	Male	Married	85 23rd Ave.	Glendale	CA	91682	Business	10/7/1978	25
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7	Chang	Martha	Female	Married	462 Reynaldo Place	Pasadena	CA	91106	Residence	4/16/1969	35
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1 Last Name 2 First Name 3 Gender	
<ul> <li>→ Marital</li> <li>5 Address1-Line1</li> <li>6 Address1-City</li> <li>7 Address1-State/Provin</li> <li>8 Address1-Zip/PostalCc</li> <li>9 Address1-Description</li> <li>10 Birth Date</li> <li>11 Age</li> </ul>	Delimiter Date Format MMDDYYYY Export Heading
	<ul> <li>→ Address1-City</li> <li>7 - Address1-State/Provin</li> <li>8 - Address1-State/Provin</li> <li>8 - Address1-Zip/PostalCc</li> <li>9 - Address1-Description</li> <li>10 - Birth Date</li> <li>11 - Age</li> </ul>

Figure 6: .CSV file column organization and corresponding import map in the Import/Export Definition – Contact window.

Moving columns into the **Columns Selected** section creates a map for CDS to follow when importing data. The number preceding a column entry indicates which column in the .csv file CDS will pull data from for the selected column. For example, the first entry in the **Columns Selected** section, **1 – Last Name**, indicates that data in the first column of the .csv file will be entered in the **Last Name** column of the contact record. Note that in this example, the entries in the **Columns Selected** section match the organization of columns in the .CSV file.

Note: Ensure the address and phone information has been properly mapped using the appropriate fields: Phone1-Description1, Phone2-Description2, and so on.



- When column mapping is completed, click **OK**.
- Give the import definition a name in the Name field and click OK.

The Import definition has been created. Definitions can be used to import data from multiple files as long as the column organization of a selected file matches the column organization of the .csv file used to create the definition(map).

To import data into CDS using an Import Definition -

• Select an import definition in the **Import/Export Definitions** window and click the **Import** button.

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	Name	Description			
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V	CSV Import				

Figure 7: Selected import definition and the Import button in the Import/Export Definition window.

• Select import options in the Contact/Business Import Options window.



Figure 8: The Contact/Business Import Options window.



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- After selecting import options, click **OK**.
- Find the file with data to be imported in the **Import File Name** window and click **Open**.

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File name: Import.csv Files of type: *.csv			ncel

Figure 9: The Import File Name window.

• CDS will display a thumbnail view of the import.

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Last Name LastName	Marital Marital	mpensatic Compensatio		Pre-ex	Birth Da_ DOB
Roberts	Married	45,000	10/1/1997	Diabetic	8/16/196
Bingman	Single	75,000	3/15/1999		9/1/1960
Vasquez	Married	55,000	1/24/1998		10/7/1978
O'Reily	Single	40,000	3/27/2003		6/27/198(
Chang	Married	43,000	7/12/2001		4/16/196
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Figure 10: The Import File Name window.

- Verify that the import definition has been mapped correctly. If the mapping needs to be redone, click the **Cancel** button and set up the import definition correctly.
- If the mapping is correct, click **OK** to perform the import.

