

## 6.0 Import of an Existing Visitor Appointment List

Visitor Watch™ has the ability to import an existing visitor appointment list. This is useful if your company is switching to Visitor Watch™ from another visitor tracking system and it is necessary to maintain all existing visitor records. This feature can also be used to import a group of visitors so that manual entry is not necessary.

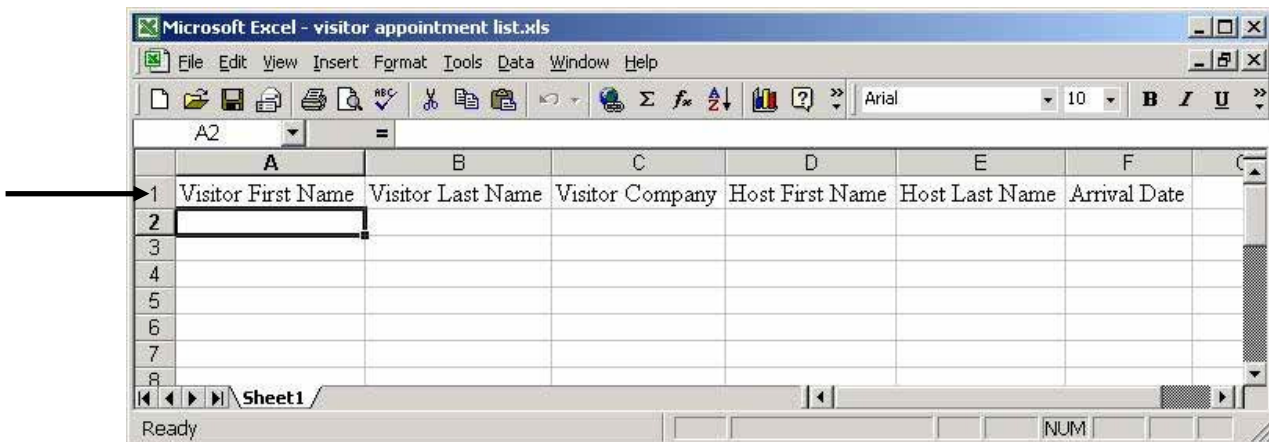
### 6.1 Preparing to Import an Appointment List.

Before an appointment list can be imported into Visitor Watch™ it must be saved as a Microsoft Excel© file format. The first row of the spreadsheet must contain the field names for each column. Please see the diagram below. The field names do not have to be in any specific order. A valid appointment entry in the spreadsheet consists of the required fields Visitor First Name, Visitor Last Name, Visitor Company, Host (employee) First Name, Host (employee) Last Name, and Arrival Date.

Optional fields that can be imported into Visitor Watch™ are Host Department, Host Job Title, Host Building Number, Host Room Number, Host Floor Number, Host Phone Number, Host Email, and Notes. Typically these optional fields are read from the host (employee) record and filled in by Visitor Watch™ to the appointment list, however if these fields are included in the spreadsheet they will override the database values for these fields.

The host name must already exist in the Visitor Watch™ database or the appointment cannot be added. If a visitor needs to be specified with no company something must be entered, for example the word Self or None could be used to indicate the visitor is not representing a company.

All information must reside on the main worksheet. The default main worksheet is called Sheet1 as seen at the bottom of the Excel spreadsheet. This name can be changed if desired. The Appointment Import Utility will only import information from the first worksheet. Any data on any other worksheet in the Excel file will go untouched.



### 6.1.1 Column Names

The Visitor Watch™ system uses an import method that offers a very flexible naming convention for the columns. The system uses a smart mapping method that tries to determine the field names without using a strict field name scheme. The importation method is not case sensitive and there is no limit on the number of spaces between words.

Here are some examples of column names:

#### Required Fields:

##### **Visitor's first or last name:**

Visitor FirstName	Visitor First	Visit First Name
Visitor LastName	Visitor Last	Visit Last Name
Visitor First Name	Visit First	VisitFirst
Visitor Last Name	Visit Last	VisitLast
Guest FirstName	Guest First	Guest First Name
Guest LastName	Guest Last	Guest Last Name
Guest First Name	Guest First	GueFirst
Guest Last Name	Guest Last	GueLast

##### **Visitor's company:**

Company	Co	Co.
Visitor Company	Visitor Co	Visitor Co.

##### **Arrival Date:**

Date	Arrival Date	Arrive Date	Appointment Date
Visit Date	Visitor Date	Date of Arrival	Date of Visit
Date of Appointment		Visitor Arrival Date	

\* Note the word appointment can be replaced by an abbreviation such as Appt.

##### **Host's first or last name (employee or staff):**

Host FirstName	Host First	Host First Name
Host LastName	Host Last	Host Last Name
Host First Name	Host First	HostFirst
Host Last Name	Host Last	HostLast
Emp FirstName	Emp First	Emp First Name
Emp LastName	Emp Last	Emp Last Name
Emp First Name	Emp First	EmpFirst
Emp Last Name	Emp Last	EmpLast

\* Note the abbreviation Emp can be replaced by the full word Employee and Host could be replaced the word Staff

Optional Fields:

**Arrival Time:**

Time            Arrival Time            Arrive Time            Appointment Time  
Visit Time      Visitor Time            Time of Arrival        Time of Visit  
Time of Appointment            Visitor Arrival Time

\* Note the word appointment can be replaced by an abbreviation such as Appt.

**Longterm Date:**

Long Date            End Date            Ending Date            Appointment End Date  
Long Term Date            LongtermDate

\* Note the word appointment can be replaced by an abbreviation such as Appt.

**Host's Department:**

Department            Host Department            Employee Department  
Emp Department            Staff Department

\* Note the word Department can be replaced by an abbreviation such as Dept.

**Host's Title:**

Title            Host Title            Employee Title            Emp Title            Staff Title

\* Note the word Title can be replaced by the alternate Job Title.

**Host's email:**

Email            Host Email            Employee Email            Emp Email            Staff Email

**Host's Room:**

Room            Host Room            Employee Room            Emp Room            Staff Room

\* Note the word Room can be replaced by Room No, Room #, or Room Number

**Host's Building:**

Building    Host Building            Employee Building            Emp Building  
Staff Building

\* Note the word Building can be replaced by Building No, Building Number, Building #, Bldg #, Bldg, Bldg No, or Bldg Number.

**Host's Floor:**

Floor            Host Floor            Employee Floor            Emp Floor            Staff Floor

\* Note the word Floor can be replaced by Floor No, Floor #, or Floor Number.

**Host's Phone:**

Phone            Host Phone            Employee Phone            Emp Phone            Staff Phone

\*Note the word Phone can be replaced by Phone No, Phone Number, Phone #, Ext, Ext #, Ext No, Extension, Extension #, Extension No, or Extension Number

**Notes:**

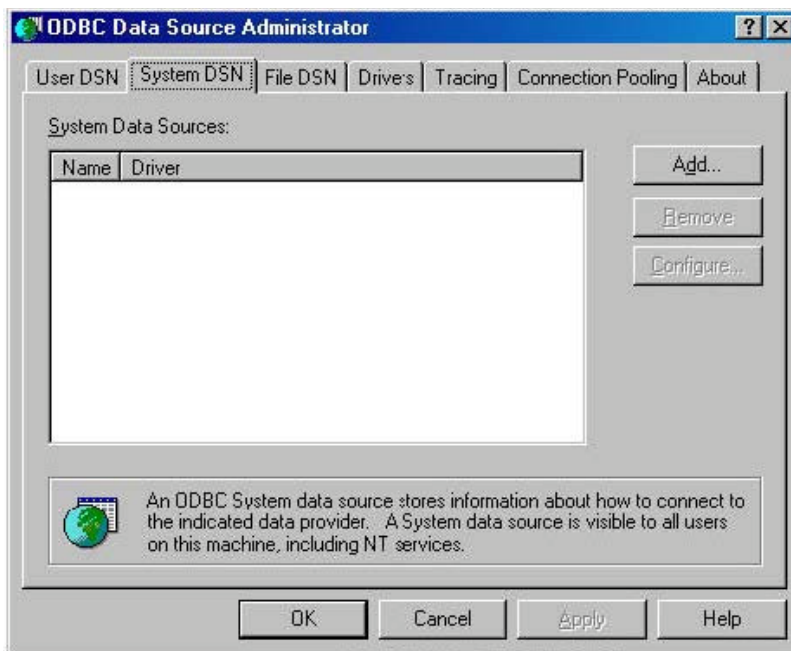
Notes            Visit Notes            Appointment Notes            Appt Notes            Arrival Notes  
Visitor Notes            Misc Notes

### 6.1.2 System DSN Setup

To be able to import information from an Excel Spreadsheet a System DSN Driver connection must be established.

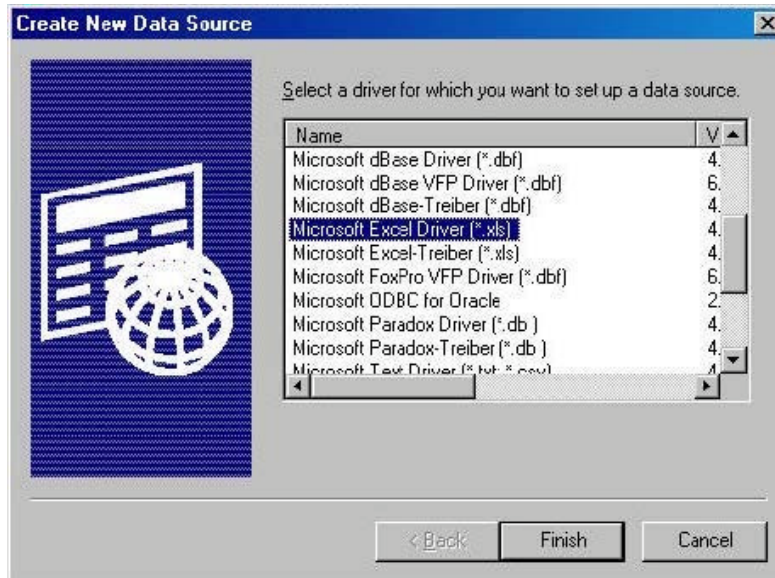
To start open the Control Panel by clicking the Start Menu selecting the Settings option then selecting Control Panel. Open the Administrative Tools folder and then double click on the Data Source (ODBC) icon. Once in, click on the System DSN tab.

For Windows XP click the Start Menu then click Control Panel. Next click Performance and Maintenance then click Administrative Tools. Finally click on Data Sources.

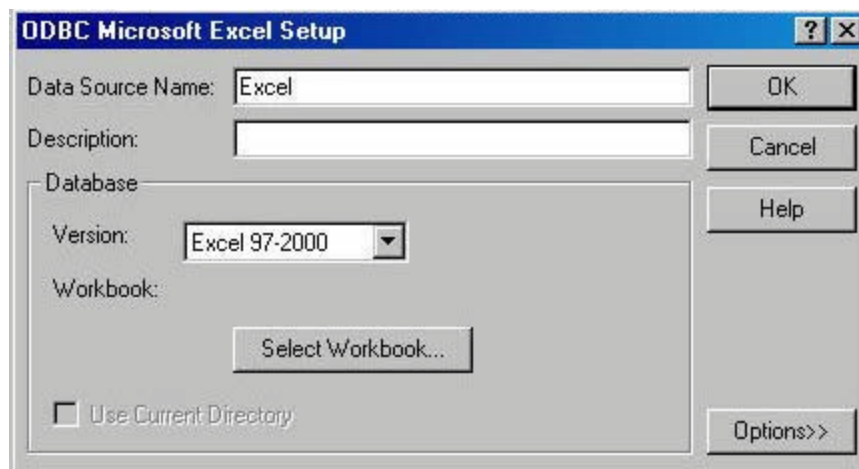


Next click on the Add button.

On the Create New Driver Source window that displays there are two references to excel drivers. Select the Microsoft Excel Driver (\*.xls) and then click the Finish button.



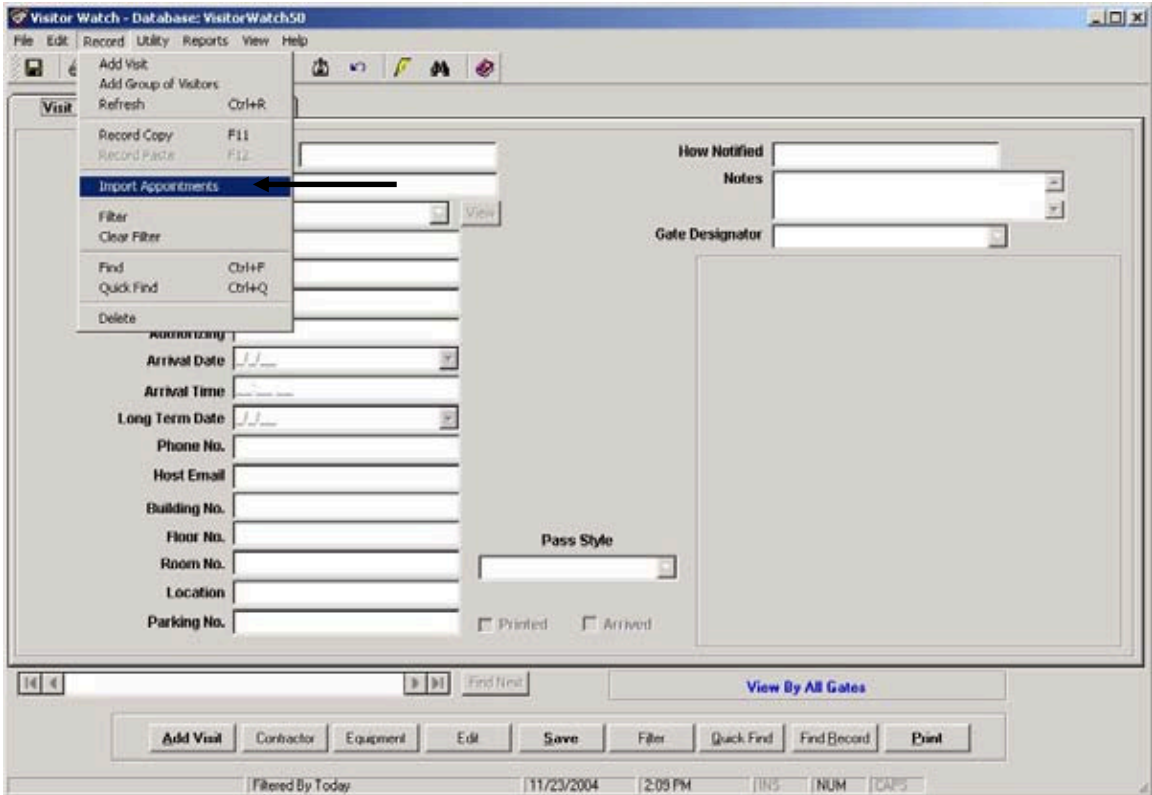
An ODBC Microsoft Excel Setup window will display.



In the ODBC Microsoft Excel Setup window all that needs to be done is type Excel in the Data Source Name field and click the OK button. Now the system is configured to work with Excel files.

## 6.2 Importing an Appointment List

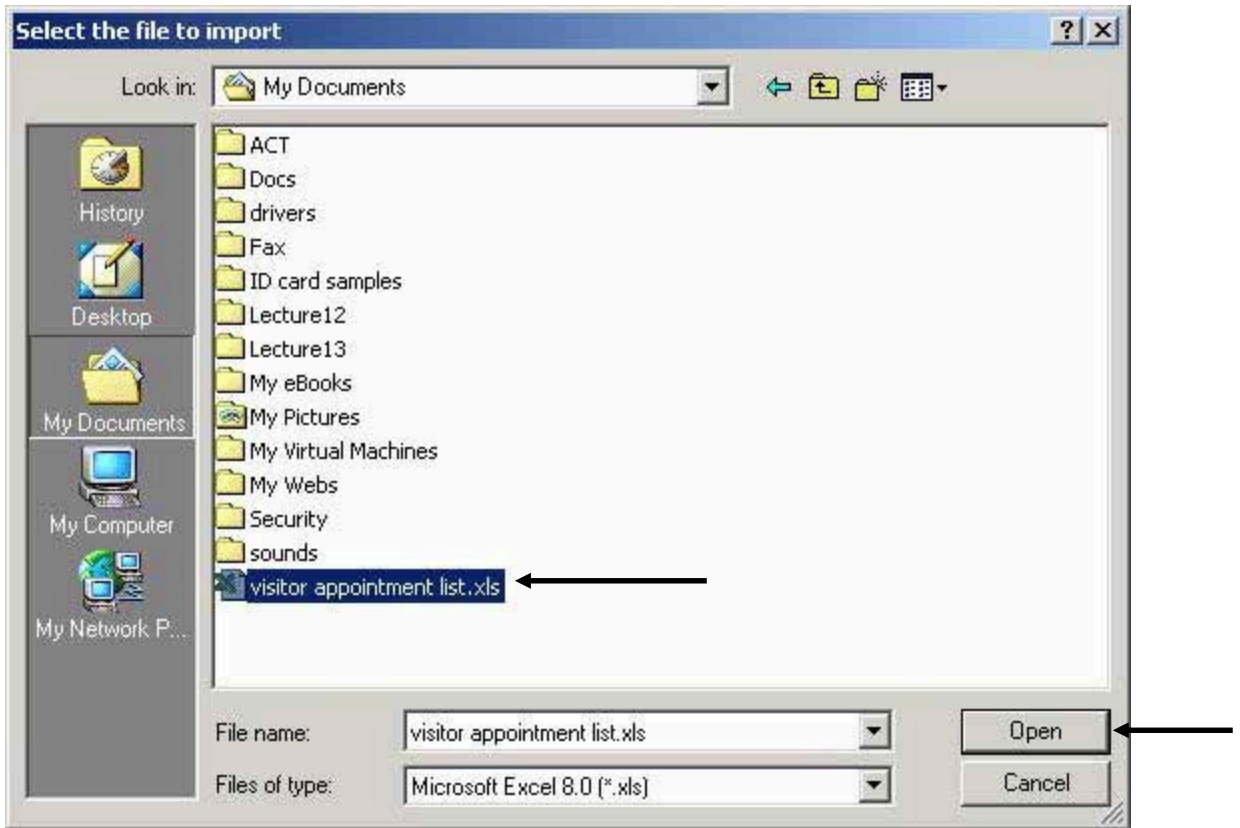
To import an existing appointment list click the Record button from the main menu. Then scroll down to and select Import Appointments as shown below.



This will display the window shown below. Type in the location of the Excel file containing the appointment list information or click the Browse button shown below. This will display the Select the File to Import window shown on the next page.



Select the File to Import and click the Open button shown below.



This will close the Select the File to Import window and fill in the location of the file to be imported on the Import Appointments window. Click the Import Appointments button and Visitor Watch™ will import all valid records. If any records could not be imported a message will display in the text box just below the file location box. The View Error Results button can be clicked at this time to see a detailed log of which records and why they could not be imported.

