

CleanOpsStaff *justDoNext* Import Wizard Help

Updated 11/22/2008

(Recommend you print this file)

About CleanOpsStaff Import Wizard

CleanOpsStaff justDoNext Import Wizard is a *CleanOpsStaff-Pro* add-on upgrade. It is functional in the Demo Mode and Full mode but only for demonstration, training, and evaluation. If you need the full features and functions of *CleanOpsStaff Import Wizard*, you must purchase the upgrade from <http://hunterconsulttrain.com/DataImportWizard.aspx>. Once the Wizard is activated your *CleanOpsStaff* becomes **CleanOpsStaff-Pro** giving you access to powerful features and capabilities to assist you in getting inventory data into *CleanOpsStaff* **without re-typing**, greatly reducing labor time and cost.

Purpose of CleanOpsStaff Import Wizard:

CleanOpsStaff justDoNext Import Wizard will allow you to save time and money imputing your space inventory data into CleanOpsStaff. If you already have your inventory data in electronic form that can be imported into an Excel spreadsheet, you can use *CleanOpsStaff justDoNext Import Wizard* to import your data into *CleanOpsStaff* and automatically convert your room/space names to APPA-CleanOpsStaff Space Category Names. You can also automatically convert Square Meters to Square Feet and Square Feet to Square Meters using the wizard. The Wizard also has a *SpacePicker* that significantly speeds up selecting Space Categories and Cleaning Levels from a flat tabbed form instead of from a dropdown list. The spreadsheet containing the external data can be of any sized and have many worksheets and the data can be in any order. *CleanOpsStaff justDoNext Import Wizard* will automatically convert and structure the data and import it into *CleanOpsStaff* as a CleanOpsStaff Inventory Data file.

CleanOpsStaff Import Wizard Functions and Capabilities:

A demo version of the CleanOpsStaff Import Wizard is included in the CleanOpsStaff-Demo and CleanOpsStaff-Full versions for demonstration, training, and evaluation purposes only. You may experiment with the demo version immediately to decide if it will be useful to your operation. *CleanOpsStaff justDoNext Import Wizard* gets its name from the fact that all you have to do to use it is "Do Next" (click the Next button) and read the instruction box to make use of this powerful feature.

Capabilities:

1. Convert external inventory data that already exist in excel spreadsheets to CleanOpsStaff format
2. Import another CleanOpsStaff Data file in order to update a CleanOpsStaff Master Data File. This capability allows different people to use a laptop in the field to collect data on a subset of the database and then upload their update to a master data file. An update report is generated that can be saved and/or printed so that you can retain a record of the updates.
3. Import external inventory data from excel spreadsheets into CleanOpsStaff
4. Import multiple records from within worksheets within an external data spreadsheet
5. Automatically convert your existing space/room name to APPA-CleanOpsStaff category names using keywords

6. Easy click-to-select "SpacePicker" input tool for entering Category Names and Cleaning Levels in the inventory worksheet and in the import wizard
7. Export CleanOpsStaff inventory data file to normal excel spreadsheets
8. Export CleanOpsStaff partial inventory data file to normal excel spreadsheets
9. Edit or enter CleanOpsStaff Data in the Temporary Conversion worksheet of the Wizard to copy and paste multiple *CleanOpsStaff* records to the *CleanOpsStaff* Macro Inventory worksheet
10. Automatically convert space cleanable units from Square Meters to Square Feet and from Square Feet to Square Meter -- especially useful for our Canadian customers and for data exchange between users on the two different systems of measurement

CleanOpsStaff Import Wizard Components:

1. External Source Data temporary worksheet and Source Data Toolbox
2. Translation Table temporary worksheet and Translation Table Toolbox
3. Data Conversion temporary worksheet and Conversion Toolbox
4. *CleanOpsStaff SpacePicker*

Steps for importing and converting external data using CleanOpsStaff Import Wizard and SpacePicker

The *justDoNext Import Wizard* has an automatic mode that guide you through the steps required to import your external data into CleanOpsStaff. The steps are listed below. Most of the time, you will simply click the Next button. The general steps are (a) Click the **Start Wizard** button, (b) read the instruction in the cyan (blue) instruction button, (c) look for a green button to click. If no green button is seen, click a yellow button after performing the tasks in the instruction box, (d) *justDoNext (click the Next button)* when instructed to do so, (e) repeat steps (a –d) until finished. Below are the instruction that appears in the instruction box as you *justDoNext (click the Next button)* to import an external file.

NOTE: WHEN IMPORTING A *CleanOpsStaff* DATA FILE, ALL OF THESE STEPS EXCEPT (STEP S-B5) ARE PERFORMED AUTOMATICALLY BECAUSE IT IS ASSUMED THAT THE DATA FILE DOES NOT REQUIRE CONVERTING OR TRANSLATION. IF YOU NEED TO CONVERT OR TRANSLATE A *CleanOpsStaff* DATA FILE, THEN YOU CAN MANUALLY, GO BACK TO THE TRANSLATION TABLE WORKSHEET AND DO SO.

- S-A1: OPEN EXTERNAL FILE: To Open External File, JUST DO NEXT!
- S-A2: LOAD EXTERNAL FILE WORKSHEET INTO CleanOpsStaff SOURCE WORKSHEET: (1) Click Show External File Button to show the External File; (2) Click Arrow or External File Tabs to view different worksheets within the External File; (3) Click BUTton-1 to load the External File Worksheet into the Wizard's Source Worksheet; (4) Click the Next button to continue to next step.
- NOTE: You can also import CleanOpsStaff Inventory Data files. The Wizard will recognize them as CleanOpsStaff Data files and automatically process them and take you to Step S-B5.
- S-A3: The External File was opened. External Data was loaded into CleanOpsStaff Import Wizard Source Worksheet. The External File is now closed. (1) To continue to next step JUST DO NEXT!
- S-A4: SET THE EXTERNAL DATA HEADING ROW: (1) Click row in the worksheet containing the Headings; (2) click Heading Row-Sel; (3) To continue to next step JUST DO NEXT!

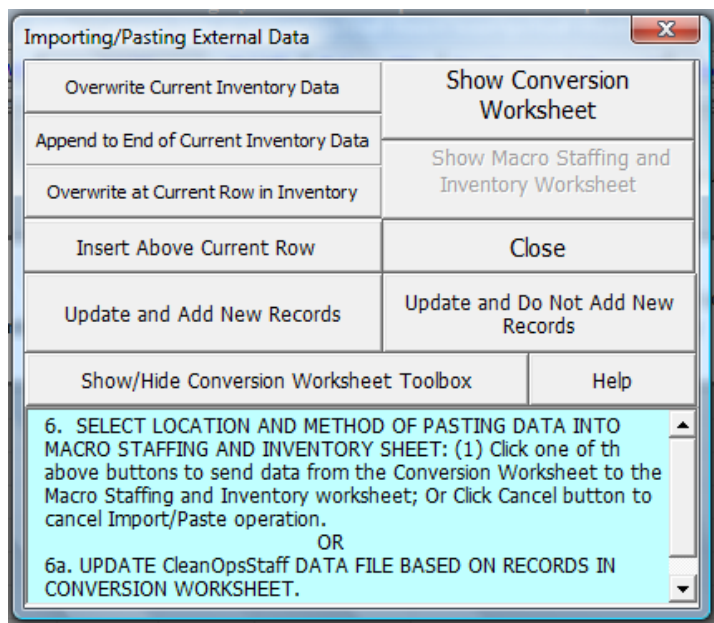
- S-A5: SET THE BEGINNING ROW OF DATA: (1) Click row inside the worksheet that is to be the beginning row to import; (2) click Beginning Row of data-Sel; ; (3) To continue to next step JUST DO NEXT!
- S-A6: SET THE ENDING ROW: (1) Click row inside the worksheet that is to be the last row to import; (2) click Ending Row of data-Sel; (7) To continue to next step JUST DO NEXT!
- S-A7: SET WHICH EXTERNAL DATA COLUMN IS TO BE IMPORTED INTO EACH CleanOpsStaff Column: (1) Click Column to be import into Bldg Name/Number then click Bldg Name/Number-Sel/Imp; (2) Repeat step 2 for all CleanOpsStaff columns you wish to import; (3) To continue to next step JUST DO NEXT!
- S-A8: Assign an External Source Column to CleanOpsStaff Column [Bldg Name/Number] or [Floor Name/Number] or [Space/Room Name/Number] or [Cleanable SF (CSF)] or [Flex Field] or [Column to be converted to APPA Categories] or [Cleaning Level] or JUST DO NEXT!
- S-A8: You are doing wonderful. You have assigned all CleanOpsStaff Columns. JUST DO NEXT!
- S-A9: UNIQUE SPACE NAME FROM SOURCE WORKSHEET: CleanOpsStaff Import Wizard copied the unique Space Names from the Wizard Source Worksheet and pasted them in the first column of this Wizard Translation Table worksheet. (1) Click Button-1 to repeat this Unique Space Name Copy and Paste operation if you wish; or (2) to continue to next step JUST DO NEXT!
- S-B1: AUTOMATICALLY ASSIGN STANDARD CATEGORY NAMES TO YOUR EXTERNAL DATA UNIQUE SPACE DESCRIPTIONS/NAME: (1) Click Button-2 to automatically assign APPA/CleanOpsStaff Category names to your unique space names; or (2) To continue to next step JUST DO NEXT!
- S-B2: You are doing a great job. You are almost done. JUST DO NEXT!
- S-B3: CONVERTING YOUR SPACE DESCRIPTIONS/NAMES TO STANDARD CATEGORY NAMES USING THE TRANSLATION TABLE: If you completed the Translation Table, then the justDoNext Import Wizard converted your space names to APPA-CleanOpsStaff names based on embedded keywords. If you want to repeat this step, (1) Click Button-1 to let the justDoNext Import Wizard convert your space descriptions/names to standard APPA/CleanOpsStaff space category names or (2) to continue to next step JUST DO NEXT.
- S-B4: USE SpacePicker TO MANUALLY EDIT THE STANDARD APPA-CleanOpsStaff STANDARD CATEGORY NAMES: (1) Click Button-2 to manually edit converted Space Categories and Levels with CleanOpsStaff SpacePicker ; or to continue JUST DO NEXT.
- NOTE: The Wizard used the Translation Table to convert your Space Description/Names to standard APPA/CleanOpsStaff Space Category Name. You can edit the worksheet before sending this information to the CleanOpsStaff Macro Staffing Inventory Worksheet. You can use

this worksheet as a data input area if you prefer to enter data here rather than the Macro Staffing Inventory Worksheet.

- S-B5: SEND DATA FROM CONVERSION WORKSHEET TO CleanOpsStaff MACRO STAFFING AND INVENTORY WORKSHEET: (1) Click Button-3 to send the converted columns to CleanOpsStaff Macro Staffing and Inventory Data worksheet, or JUST DO NEXT.
- NOTE: You can use this worksheet as a data input area even when you are not importing from an external source if you prefer to enter and edit data in a spreadsheet environment rather than in the CleanOpsStaff Macro Staffing and Inventory Worksheet. You would then use Button-3 to send your work to in the Macro Staffing and Inventory Worksheet.
- 6. SELECT LOCATION AND METHOD OF PASTING DATA INTO MACRO STAFFING AND INVENTORY SHEET: (1) Click one of the above buttons to send data from the Conversion Worksheet to the Macro Staffing and Inventory worksheet; Or Click Cancel button to cancel Import/Paste operation.

OR

- 6a. UPDATE CleanOpsStaff DATA FILE BASED ON RECORDS IN CONVERSION WORKSHEET. Use the 'Update and Add New Records' button or the 'Update and Do Not Add New Records' button to update the Data file in memory with the records in the file being imported



Once you become familiar with the Wizard, you can perform operations manually without starting the Wizard. Below is a listing of the Wizard buttons and the function they perform.

External Data Source Worksheet Toolbox Buttons and Boxes

- **File to Import Infobox:** This information box is used by the Wizard to indicate the last external imported. There is no need for you to enter anything in this box.

- **Sheet to import:** This information box is used by the Wizard to indicate the last worksheet from the external imported. There is no need for you to enter anything in this box.
- **Headings Row Input box:** Enter the row number of the external file **Source** worksheet data headings or click inside the external file worksheet row and then click the **Sel** button. When you click the **Sel** button, the row number will be automatically entered into the input box and the row will be highlighted in **yellow**.
- **Beginning Row Input box:** Enter the row number of the external file **Source** worksheet where you want to begin importing data or click inside the external file worksheet row and then click the **Sel** button. When you click the **Sel** button, the row number will be automatically entered into the input box and the row will be highlighted in **blue**.
- **Beginning Row Input box:** Enter the row number of the external file **Source** worksheet that you want to the last row of data to be imported or click inside the external file worksheet row and then click the **Sel** button. When you click the **Sel** button, the row number will be automatically entered into the input box and the row will be highlighted in **green**.
- **Check All button:** Places a checkmark in all the check boxes.
- **Un-Check All button:** Clear the checkmark from all the check boxes.
- **Clr All button:** Clear the content of all textboxes.
- Bldg Name/number, Floor Name/Number, Space/Room Name/Number, Cleanable SF (CSF), Flex Field, Column to be converted to APPA Categories and Cleaning Level input boxes: Enter the Column letter of the external file source worksheet of the column you want to import into the respective *CleanOpsStaff* data field, or click inside of the external file source column and then click the Sel button and then click the Import button. NOTE: Instead of using the Sel and Import buttons, you can use the Sel/Imp button which is the same as clicking Sel and then clicking Import.
- **Seven Heading Name Infoboxes:** These are the boxes directly above the **Instruction/Information** box. As you match up the columns from the external file **Source** worksheet with the CleanOpsStaff data fields, the Heading name is indicated in these boxes.

Buttons and Boxes Common to All Three Temporary Worksheets

- **Instruction/Information Infobox :** This box provides instructions when ***justDoNext Import Wizard*** is started in auto-mode. You should read the text in this box for instructions.
- **Back Button:** When ***justDoNext Import Wizard*** is started in auto-mode use this button to go back to the previous *justDoNext* step.
- **Next Button:** When ***justDoNext Import Wizard*** is started in auto-mode use this button to go to the next *justDoNext* step.
- **Start Wizard:** Use the button to start ***justDoNext Import Wizard*** in auto-mode.
- **Open External File:** Open an external file with ***justDoNext Import Wizard*** in manual-mode.
- **Import Checked Columns:** Import all the checked columns from the **Source** worksheet to the **Conversion** worksheet.
- **Source Worksheet Button:** Switch to the **Source** temporary worksheet. This is the worksheet where the data from the external file worksheet is initially imported into in order for you to select the columns you are interested in and to match them up with the respective *CleanOpsStaff* data field.
- **Translation Table Button:** Switch to the **Translation Table** temporary worksheet. This is the worksheet where you define a translation table to convert the imported space names in the external file **Conversion** worksheet to standard APPA/*CleanOpsStaff* categories names.

- **Save Temp Worksheet button:** Save the temporary worksheet in order to save your work in the event you are not able to complete the import process during a single session. You can then treat the file you save just as you would any other external and import it the next time to run justDoNext Wizard and re-start your work where you left off.
- **Help:** Open this PDF Help file.
- **Main Menu:** Go to Main Menu.
- **Close:** Close this toolbox.
- **Cur Col:** Indicate the current column location of the insertion point (cursor).
- **Cur Row:** Indicate the current row location of the insertion point (cursor).
- **Column Start:** Indicate the first row in the current column that contains an entry (not blank).
- **Column End:** Indicate the last row in the current column that contains an entry (not blank).
- **Row Navigator:** Buttons to move to **First Row, Previous Row, Middle Row, Next Row, and Last Row**.
- **Autofit/Increase-Decrease Buttons:** Autofit, Increase and decrease current column width.
- **Ins Col:** Insert a column. If the checkbox is check then your will be prompted to confirm before the action is taken.
- **Ins Col:** Delete a column. If the checkbox is check then your will be prompted to confirm before the action is taken.
- **Ins Row:** Insert a row. If the checkbox is check then your will be prompted to confirm before the action is taken.
- **Ins Row:** Delete a row. If the checkbox is check then your will be prompted to confirm before the action is taken.
- **Clear Sheet Button:** Clear the current worksheet of all content (blank all cells).
- **Clear Sheets:** Clear the all three *justDoNext* temporary worksheets (**Source, Translation Table and Conversion**) of all content (blank all cells).
- **SM -->Sft Button:** Copy square meters from the source column, convert them to square feet and paste them into the destination column.
- **Sft -->SM Button:** Copy square feet from the source column, convert them to square meters and paste them into the destination column.
- **Unit Conversion Source Column Input box:** This is the box directly to the right of the **Sft -->SM Button**. Enter the Column letter containing the numbers to be converted or click inside of the column and then click the **Sel** button above this box.
- **Unit Conversion Destination Column Input box:** This is the box directly to the left of the **Clr Button**. Enter the Column letter of the column you want to paste the converted number to or click inside of the column and then click the **Sel** button above this box.
- **Clr Button:** Clear the **Unit Conversion Source Column Input box** and the **Unit Conversion Destination Column Input box**.
- **Dec 2/Increase-decrease Decimal Buttons:** Set the number of decimal place for the current column to two (2) place or increase or decrease the number of decimal places.
- **Sq Meters to Sq Ft upon Import Checkbox:** Check this box if the data in the **Source** is in square meters and you would like them to be in square feet when they are imported to the **Conversion** worksheet. When this checkbox is checked, the **Cleanable SF (CSF)** field name will change to **Cleanable SM (CSM)** for the cleanable square unit fields and the background color will change.

Translation Table Toolbox Buttons and Boxes

- **Source Space desc Cell:** Indicates the cell containing the location of the External File Worksheet space names or description. You do not need to enter anything here. It is for information only.

- **No. of Unique Spaces:** Indicates the number of unique space names or descriptions found in the data you are importing. You do not need to enter anything here. It is entered by *justDoNext Import Wizard*.
- **No. of Categories Assigned:** Indicates the number of unique space names or descriptions to which a standard APPA/*CleanOpsStaff* standard categories name has been assigned either by you or by the Wizard's Auto-Assign button. You do not need to enter anything here. It is entered by *justDoNext Import Wizard*.
- **Button-1: Select Unique Space Names from Conversion Worksheet:** Use this button to capture or re-capture the unique space names/description contained in the **Conversion** worksheet. You will do this so that you can assign a standard APPA/*CleanOpsStaff* space category name to each of them and/or use the Auto Assign button to let *CleanOpsStaff* attempt to assign a name based on built in key words contained within the Wizard's codes.
- **Button-2: Auto Assign APPA/*CleanOpsStaff* Category name:** Use this button to let *CleanOpsStaff* attempt to assign a name based on built in key words contained within the Wizard's codes. You will have to review the guesses the Wizard makes since the Auto-assign process is only an approximation and in some cases, there will not be a matching key word in which case no APPA/*CleanOpsStaff* space category name will be assigned.
- **Button-3: Manually Assign APPA/*CleanOpsStaff* Category Name with SpacePicker:** Use this button to activate the *SpacePicker* so that you can manually assign APPA/*CleanOpsStaff* space category name to those entries where there were no matching key word and/or those entries for which the guessed name is incorrect.

Conversion Worksheet Toolbox Table Buttons and Boxes

- **Number of Spaces:** Indicates the number of spaces contained in the **Conversion** worksheet. You do not need to enter anything here. It is entered by *justDoNext Import Wizard*.
- **No of Spaces Converted:** Indicates the number of spaces contained in the **Conversion** worksheet that have been converted to standard APPA/*CleanOpsStaff* standard category names. You do not need to enter anything here. It is entered by *justDoNext Import Wizard*.
- **Clear Checked Column(s):** Clear the content of all columns with checked checkboxes.
- **Check All:** Check all checkboxes
- **Un-Check All:** Un-Check all checkboxes
- **Button-1: Auto Convert Your Space Names to APPA-CleanOpsStaff Name Using Translation Table:** Use this button to apply the Translation Table to the space name contained in the **Conversion** worksheet.
- **Button-2: Manually Edit Converted Space Categories and Levels with SpacePicker:** Use this button to activate the *SpacePicker* to edit the assignment of standard names to accommodate unique situations within your data.
- **Button-3: Send Checked Converted Columns to CleanOpsStaff Inventory Worksheet:** When you are satisfied that the data in the **Conversion Worksheet** is what you want to import into the **Inventory Worksheet**, use this button to send the checked columns to the *CleanOpsStaff Macro Staffing Inventory Worksheet*.
- **Building Name/number , Floor Name/number, Space Name/number, Cleanable SF (CSF), Flex Field, APPA-CleanOpsStaff Category Name, and Cleaning Level Checkboxes:** Check these boxes to select the column to be sent the **Macro Staffing Inventory Worksheet** when **Button-3** is clicked.