

# Adjutant Software Customer Support Tech Notes

Document Title: Set-up and Testing CTB Importer  
Document Number: 027  
Applies to: CTB Importer

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## SUMMARY

This Tech Note describes how to set up and test CTB Importer. The objective is to experiment on a test database file without tainting the "real" database file. **YOU MUST ALSO SATISFY YOURSELF THAT THE RECORDS ARE BEING IMPORTED CORRECTLY BEFORE USING THE IMPORTER ON YOUR "REAL" DATABASE FILE.**

This Tech Note assumes that Campaign ToolBox and CTB Importer are already installed on your system, and that you have a Source file to be imported. This Source file must meet the specifications described in the Help document for your version of CTB Importer. The Source file used for testing should contain only a few records (10 or less) so that those records can be individually checked and accounted for after they have been imported.

## PROCEDURE

### Downloading and Installing CTB Importer

1. Download the setup file using the link included in the email you will have received. This is the install file - it is not the actual program file. The install file contains the actual program file. Download the file to your Windows Desktop folder.
2. When the file has been downloaded, you will see a new icon on your desktop with the same name as the file you just downloaded. Double-click on the file to run it. Use the default values unless you have a very specific need to change them.
3. When you have finished installing the program, save that file for use as a backup if needed later - or you can simply delete it. Once the program has been installed, it is no longer needed.

### Create a Test file and test the Importer

1. Start Campaign ToolBox. Look at the Opening form where it says "The current database file is..." and make a note of the file name and path for your main database file.
2. Close Campaign ToolBox.
3. Make a COPY of your database file (the one you made a note of in step 1), and then PASTE it into another folder on your system (your My Documents or your Desktop will work).
4. RENAME that file to "ImporterTest.mdb"
5. Start CTB Importer, then select your SOURCE file and your DESTINATION file. The Destination file will be the "ImporterTest.mdb" file you just created. The Source file will be created by someone in your office and should be located somewhere on your hard drive.
6. Click the "Import" button to begin the process.
7. After it is finished importing, close the Importer and open Campaign ToolBox.
8. In Campaign ToolBox, click on "Close this form", click on File, then Open.
9. Browse to locate your "ImporterTest.mdb" file, then open it.
10. Go to the Contribution Form and check the records that have been imported. Remember that Campaign ToolBox sorts them into date order, so you may have to scroll through the records to find the imported records. Verify that each record in the Source file is now in your Campaign ToolBox database file and that all fields are the same as in the Source file.

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11. When you are satisfied that they were imported correctly, go back into the Importer and test the Duplicate Prevention feature by attempting to import that same source file into the same destination file again. The Importer should warn you that it has found a duplicate record and then will ask you to confirm that you want to import again. Click on "No" since we wouldn't want to import the same records in there twice. It is highly unlikely, but possible, that you would have two contributions by the same person with the same date. The Importer will allow you to import with such a record, but only after warning you of possible duplicates.

## **Set up Campaign ToolBox and Importer for actual use**

1. In CTB Importer, click on "Select new Destination file" and select your real Campaign ToolBox database file (the file you noted in step 1 above). The Importer will remember that file for the next time you use it.
2. Close CTB Importer.
3. Locate and DELETE the "ImporterTest.mdb" file.
4. Start Campaign ToolBox, click on "Close this form". If you deleted the test file, only the "Close this form" and the "Initial Program Setup" buttons should be enabled.
5. Click on File, then look at the bottom of the menu. You should see your database file listed there (probably the second file down). Click on your file to make it the current database file.

At this point, both Campaign ToolBox and CTB Importer are ready for use.

## **NOTES**

Always have a current backup of your database file.

Testing to your satisfaction is very important. The user is solely responsible for the information reported by Campaign ToolBox. If you have any questions about the accuracy and completeness of records being imported into Campaign ToolBox by CTB Importer, make sure they are cleared up before using the Importer on your database file.

The Source file must be EXACTLY as described on the help document that comes with your program. If you have extra blank lines at the end of the file, CTB Importer will try to treat them as records and will display an error. In that case, you should open the Source file using Windows Notepad, set Wordwrap to OFF (click on the "Format" menu item, and uncheck "Word Wrap"), and delete any extra lines or other problems.