IMPORT WORKSHOP

Workshop

Import Workshop

Overview

This workshop will help participants understand the tools and techniques used in importing a variety of different types of data. It will also showcase a couple of the new import features that have been added in the last few months.

Workshop Step by Step

Getting Started

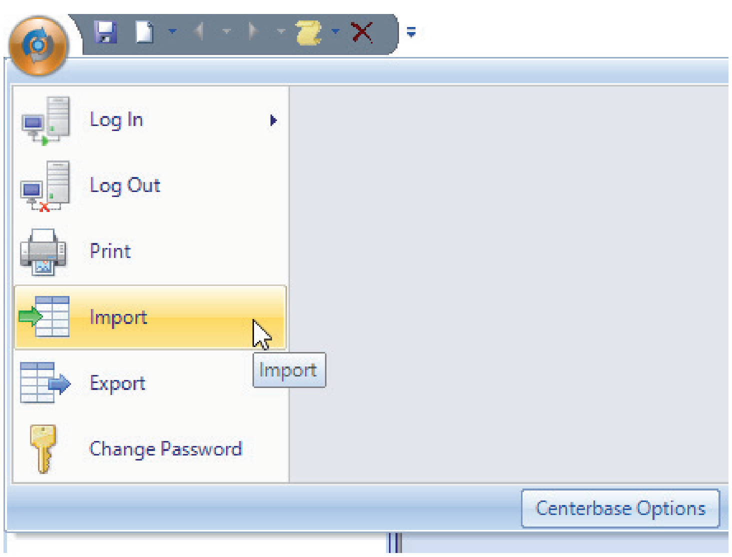
First, let's download some files we need.

- Download the Import Data Files from www.centerbase.com/ImportWorkshopFiles
- Unzip the files somewhere easy for you to access (such as your desktop)
- Go to www.centerbase.com/AdminTool
- Click on **Download Beta Version**
- **Run the downloaded file to install the latest version of the Windows Administrative Tool**

Once you've downloaded the Windows Administrative Tool, go ahead and open it.

After opening and logging in to the Windows Administrative Tool, open the **Import Wizard.**

- Click on the menu button in the upper left corner and select **Import**.



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Source File

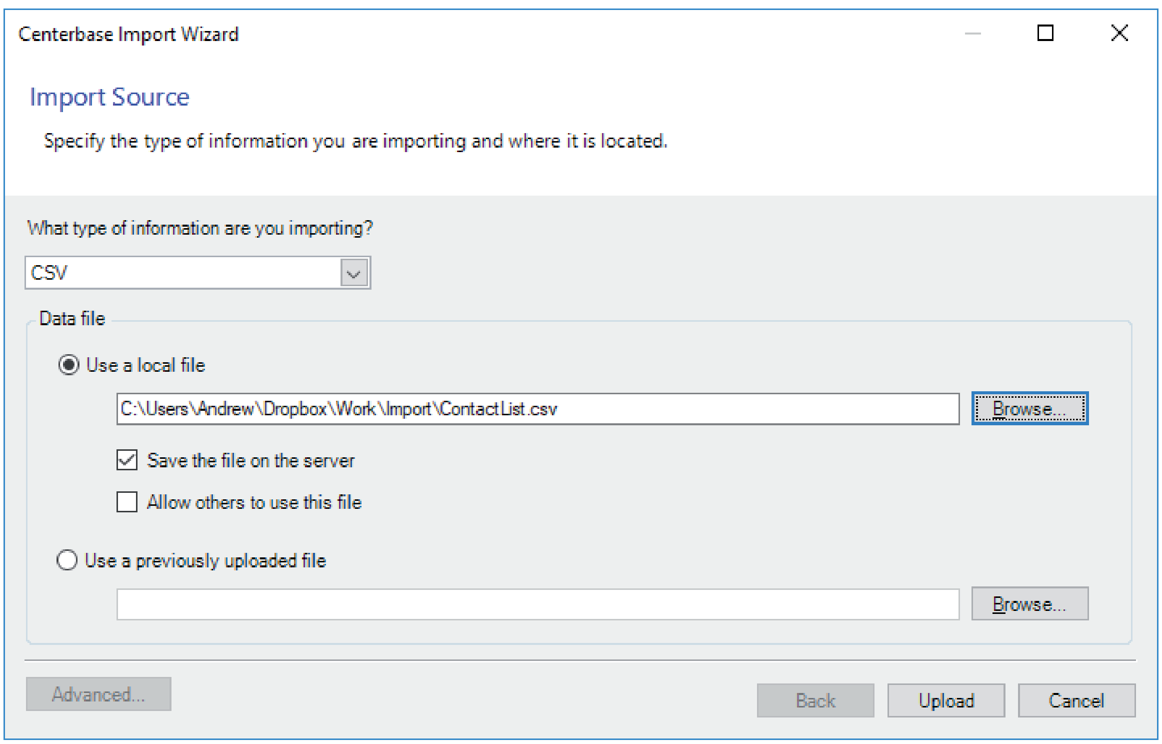
The primary data file that Centerbase supports is a **CSV (Comma delimited) file**. Most applications allow you to export directly to a CSV file, or you can convert Excel Spreadsheets to CSV using the Excel Save As option and selecting the CSV (Comma delimited) type under the Save as type dropdown. The first row of the CSV file needs to have column headers and each header must be unique. You can call a column Phone 1 and another Phone 2, but you can't have two columns both called Mobile Phone (for instance). Centerbase also supports legacy ACT and Goldmine files as well as DBF (dBase) files.

We're going to start by uploading our **ContactList.csv** file.

- Click the **Browse** button in the "Use a local file" section and find your ContactList.csv file.
- Double click on it and it will show up in the file text box.

By default, the **Save the file on the server** option is checked. This means that even after the import is complete, the data file will be available on the server. This allows you to easily update imported data by accessing the original file. It can also allow you to validate by seeing exactly what the data looked like when you ran the import.

*If you are working with another consultant and you are going to need to share a data file, you can check the **Allow others to use this file** option. This data file will now be available to anyone with import rights in Centerbase to view or use in another import.*



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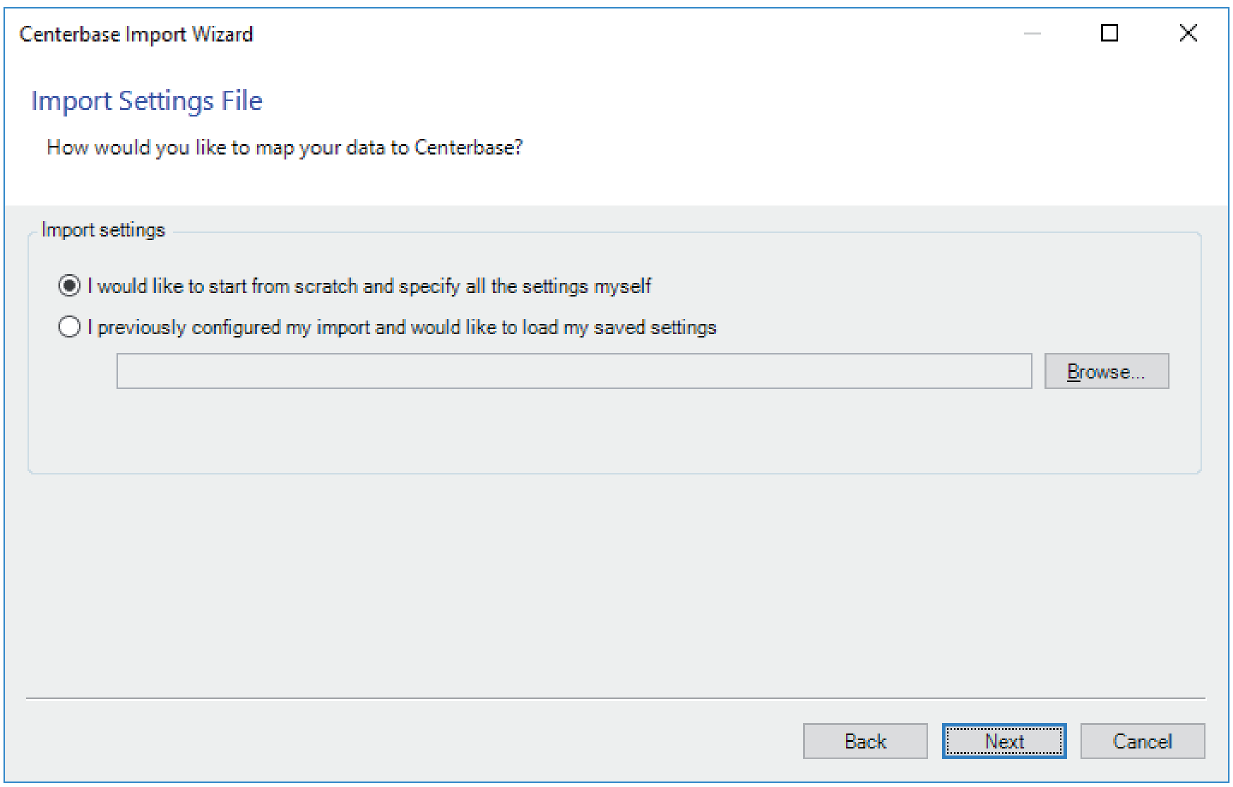
- Once you've chosen your file, click **Upload** and it will be uploaded to the server. The next screen will show you the progress of the upload.

Note: If the file is open in Excel you will get a "process cannot access the file" error, so make sure to close it before proceeding. After the file has been uploaded, you can open it back up in Excel to reference it without needing to worry.

Once the upload has completed you will be taken to the Settings File screen.

- Check **I Would like to start from scratch and specify all the settings myself** and then click **Next.**



Mapping Data

Now we get to the data mapping screen. This is where the magic happens. Here you customize your import to say exactly what type of items are going to be imported and what fields are going to get set. It starts out pretty empty. You just have the fields from your import file on the left and two empty areas for Centerbase Items and Centerbase Fields. To get started we have to specify at least one type of item that we are importing.

- Right click in the middle Centerbase Items area and choose **Add an Item**.
- Choose **Contact** from the list and click **OK.**

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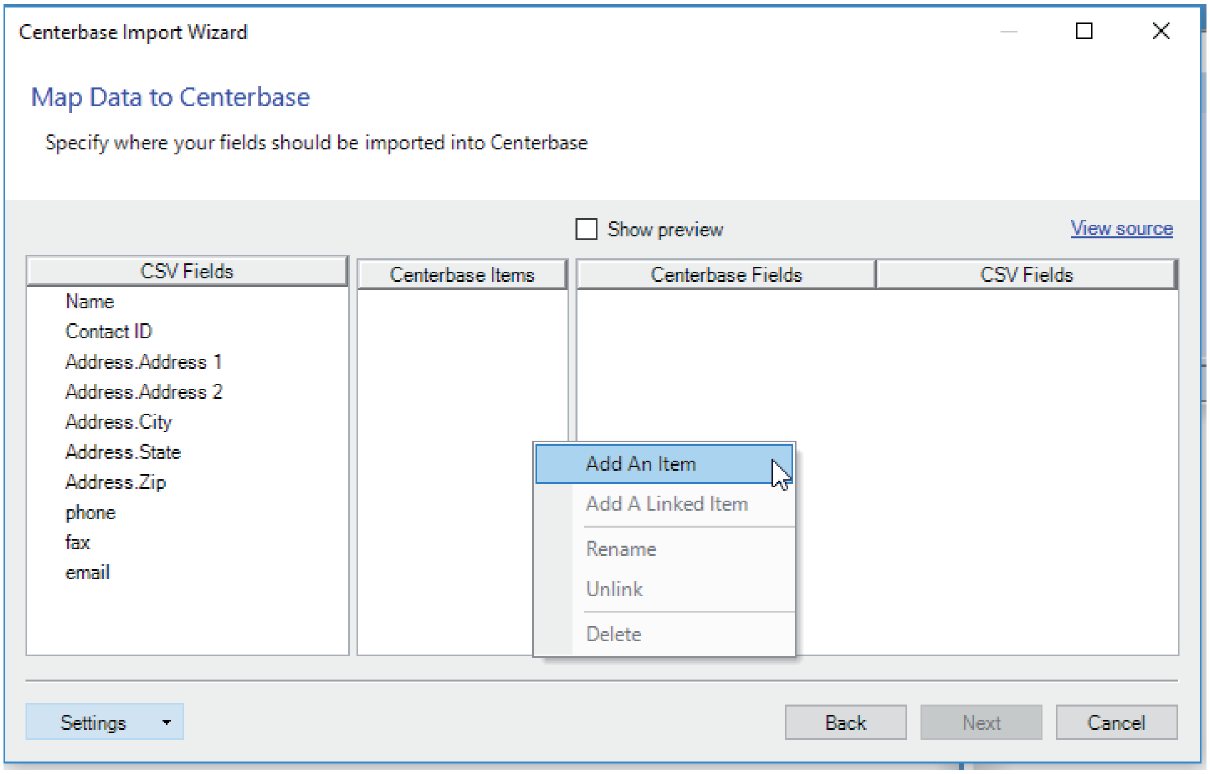

Now we have an item we are importing to and a list of that item's fields in Centerbase. Now all we have to do is say where the fields from our spreadsheet need to go in Centerbase. To do this, we simply drag the CSV field over to the appropriate Centerbase field.

- Drag **Name** to the Contact **Name** field.
- Drag **Phone** to the contact **Phone** field.
- Drag **Fax** to the contact **Fax** field.
- Drag **Email** to the contact **Email Address** field.
- Drag **Address.Address 1** to the contact **Address** field. Hover over it and it will expand. Drop it onto the **Address 1** portion of the field.
- Repeat for **Address 2, City, State, and Zip.**

You'll notice as we map each field, both the Centerbase field and CSV field are bold so we can easily see everything we have and have not mapped. Now we're just left with Contact ID. In this case, this represents a unique identifier for the contact in the program this was exported from. Given this, we are going to create a custom field to hold it.

- Right click anywhere in the Centerbase Fields area and select **Add a Field**.
- Name your field **Imported ID** and mark it as a **Text** field. I usually recommend naming this field based on the program the data came from (like Amicus ID or Timeslips ID), but since this is test data from a fictional program, Imported ID will be fine.

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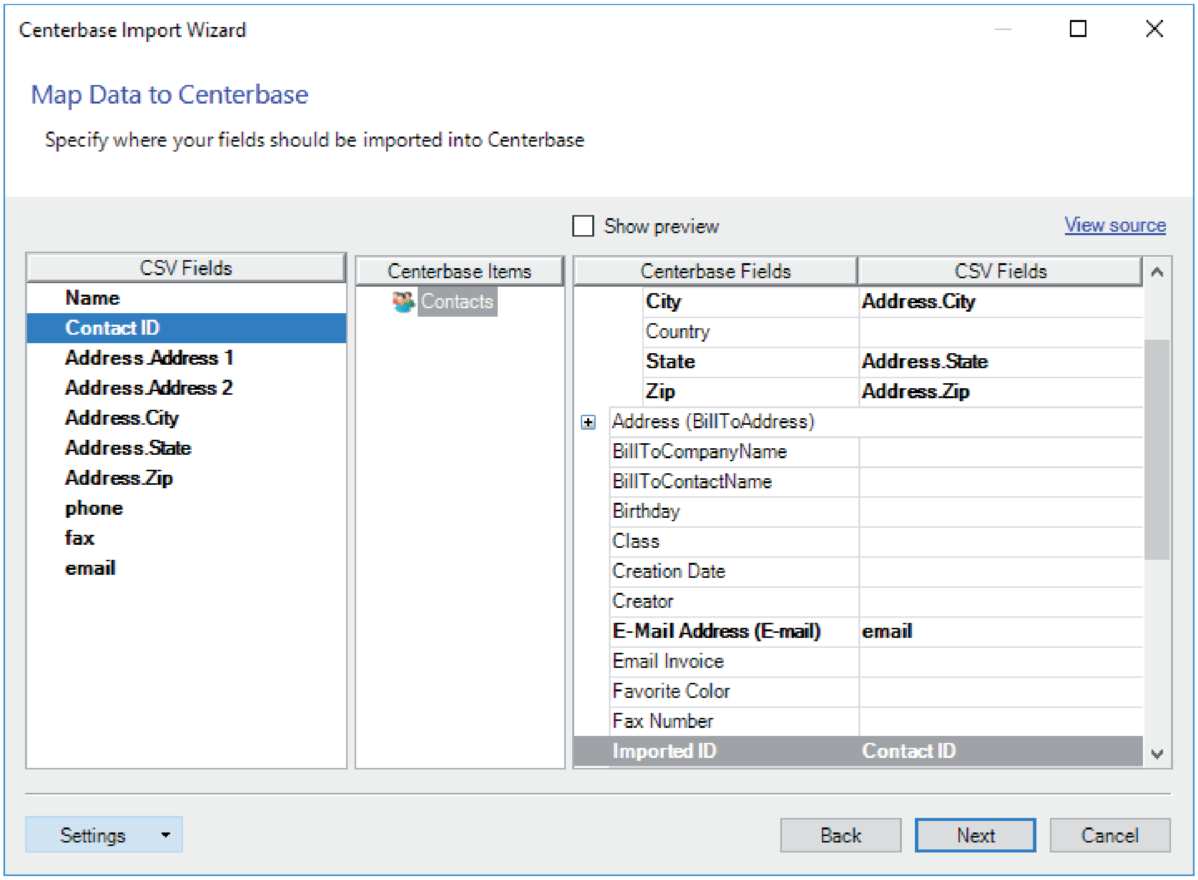
- Drag **Contact ID** to the contact **Imported ID** field.



Saving your Settings

Even if you only intend to map and run this import one time, it is always a good idea to save your Settings. It allows you to have a record of exactly what you mapped and imported at the time, makes it much easier to re-import or update data, and allows you to leave the import wizard without having to start all over.

- Click the **Settings** button in the bottom left and select **Save Settings**.
- Give it a name (and a long description if you want).
- If you select Public, then this settings file can be used by others. This is used if you have multiple consultants working on a database that will need to access it or if you are creating a re-usable import template that the client can use.
- Click **Save.**

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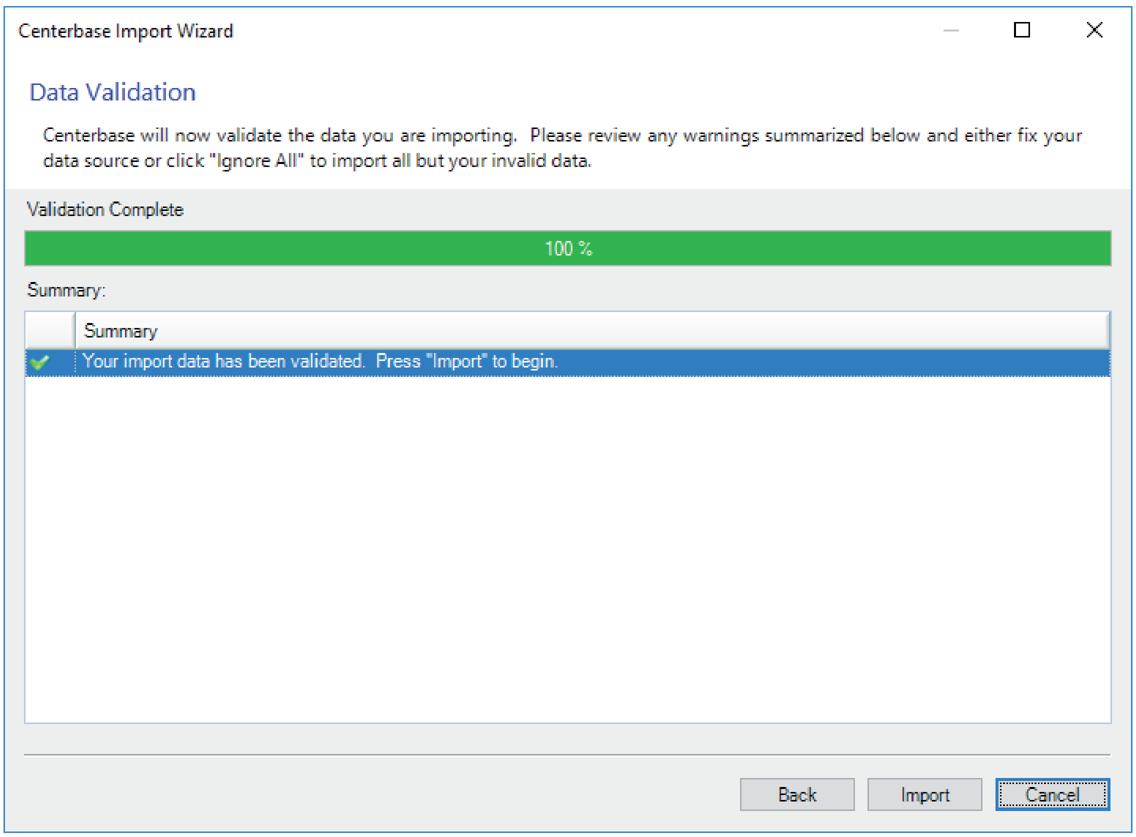
- Now that your settings have been saved click **Next**.
- This takes us to the Duplicate Checking screen. We'll go over this area in the next section, so for now just click **Validate**. This runs a validation against your import, making sure that things like true/false, date, and number fields have valid data mapped to them. If there are any problems, it will let you know what they are and show you where to find them so you can fix them.



Running the Import

Everything looks good with this file, so we are ready to Import.

- Click **Import.** This will run the import and show you the detailed progress.

Note: There are two phases of the import: preparation and commit. If the import is still in the preparation phase, you can cancel and either exit the import wizard or make changes before running again. If the import is part way through committing, it needs to finish completely and cannot be cancelled.

- Once both phases are complete it will recalculate any formulas affected by this import and then show you an Import Complete message.

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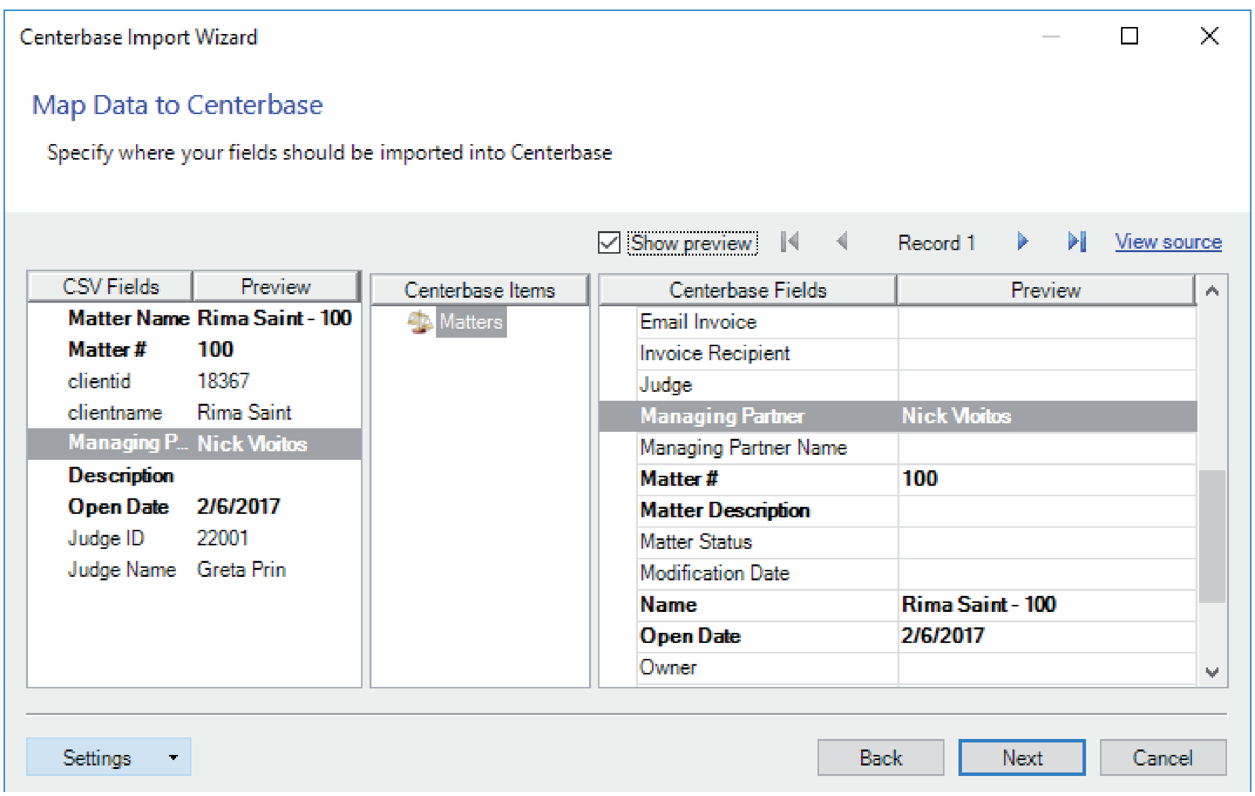
- Now that the import is complete we can click **Next** and go to the **Import Complete** screen. Ignore the checkbox that says Open the Form Designer as this will only open the PC Version form designer which will not be used by anybody.
- Click **Finish** to close the Import Wizard.

Congratulations, you just imported your first set of data. We can go to the web version and click on our list of contacts to see what we imported. Since we didn't specify a creation date, we can just look at the contacts that were recently created to see them.

Importing Additional Data

Now we are ready to do a second, slightly more complex import.

- Go back to the **Windows Administrative Tool** and open the **Import Wizard**.
- This time, upload the **MatterList.csv file**.
- Select **Start from Scratch** and we are ready to start mapping data.
- First, add a **Matter** to the import and map the basic fields like **Matter Name**, **Number**, **Description** and **Open Date**.



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- Now we are left with fields that represent the **Client, Judge, and Managing Partner** for the matter.
- The **Managing Partner** is pretty easy, we can just import that directly to a user field by dragging it like any other field. User Lookup fields (as well as the creator and owner fields) will see if there is a user with the same username in Centerbase. If it is found, that existing user will be populated in the lookup field. If not, a new/inactive user will be created and populated in the lookup field. This can be done for other user lookup fields as well like Timekeeper on billing entries or Scheduled User on Activities.
- Drag the **Managing Partner** field onto the Matter **Managing Partner** field. If you don't have one, right click in the Centerbase Fields area and select **Add a Field**. Set it as a **Lookup** field for **Users** (NOT User Contacts).

Viewing Source Data

We can look at the values in the source data to verify if we need to adjust any user names or if we can just let it create new users.

- Click the **Show Preview** checkbox and you will see the first row of data in a preview next to the CSV Fields, as well as any Centerbase Fields you have already mapped to. You can use the record browser next to that checkbox to browse through other records in your preview.
- Finally, you can click **View Source** to view the entire spreadsheet. If you double click on a row in the **Source View**, then it will select that record in the preview on the Import Wizard.

Resuming the Import Wizard

At this point, let's say we needed to leave the import for some reason. Maybe we need to adjust some of our users, add some additional item types, or just go out and get a coffee. Let's go ahead and save our import settings at this point.

- Click the **Settings Button.**
- Next, click **Save Settings** and give it a descriptive name like Matter Import.
- Close the Import Wizard by either clicking the close **X** in the upper right corner of the window or clicking the **Cancel** button in the bottom right corner.

Now we have taken care of whatever we needed to do and we're ready to open the Import Wizard back up.

- Open the **Import Wizard** and you should see the **Source Data** screen.

Normally we'd upload a file at this point, but we already did that earlier and told it to store it on the server.

- Click the **Browse** button next to "Use a previously uploaded file." This shows us all of the import files we've uploaded and saved on the server with the most recently uploaded file at the top.
- Double click on the **MatterList.csv** file and click **Next** to go to the Import Settings screen.

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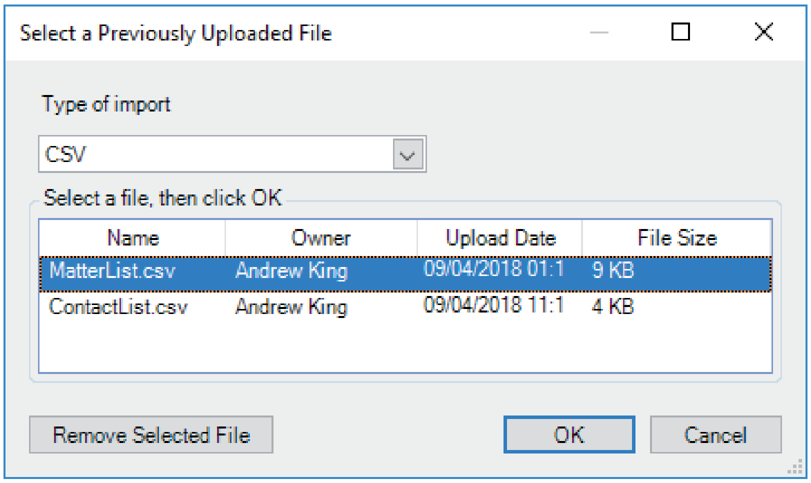
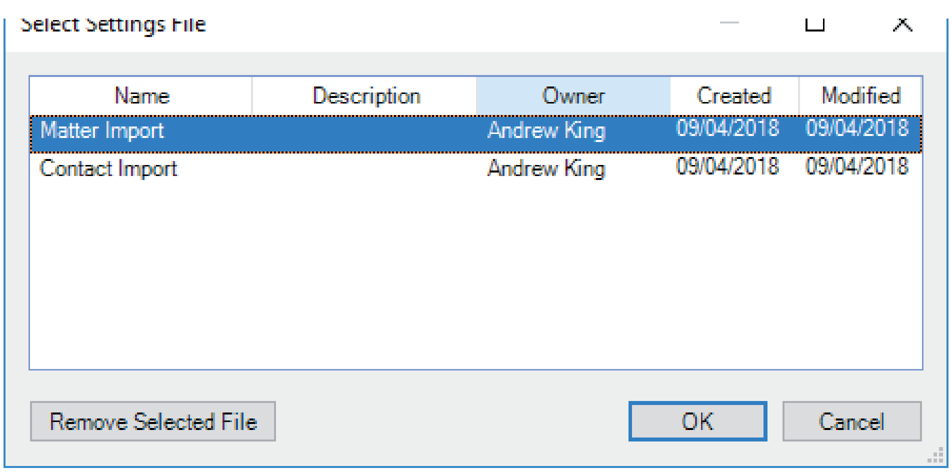


- Once again, normally we would be starting from scratch, but we've already made some progress on this import. Instead, click the **Browse** button and you will get a list of all the Import Settings you have saved.

- Double click on the **Matter Import** settings file and click **Next** to get back to the Map Data screen.

You'll notice all the items and fields you mapped are ready to go. If you accidentally open a settings file that was made for a totally different CSV then some or all of the fields might not show as mapped because it matches the source fields using the header column. If the column name has changed in the spreadsheet or it does not exist, that mapping will simply be ignored. If you notice this, you can load the appropriate settings file by clicking the **Settings** button in the bottom left and selecting **Load Settings**.

- Choose the appropriate file and click **OK** to load those settings.



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Mapping Lookup Fields

Now we are left with the remaining lookup fields to deal with. You'll notice at this point, all of the other lookup fields in Centerbase are showing a drop-down box and are greyed out. You can't map any data to them or do anything with them.

- First, make sure the **Show preview** checkbox is unchecked.
- Next, we have to add a linked item to our import. In this case, we are setting the Client on a matter which is a **Contact**, so we'll right click on the **Matter**, select **Add a Linked Item** and choose a **Contact**. Now we have a matter with a linked contact.
- Map the **Client ID** to the Contact's **Imported ID** field. We already imported our contacts previously, so we don't need to bring in the contacts name, phone number, address, etc. All we need to do in this case is map the ClientID from our source data to the Contact's Imported ID field.

This file also has a Judge that needs to be set on this Matter. This is also a contact, so we'll need to map a second contact to this matter.

- Right click on the **Matter**, select **Add a Linked Item** and choose a **Contact** again.

Now we have 2 contacts, Contact and Contact (2). We are going to use Contact to represent our Client on the matter and Contact (2) to represent the Judge.

- Click on **Contact (2)** and drag the **Judge ID** to the **Imported ID** field.

Now the Contact has the client's ID mapped and Contact (2) has the judge's ID mapped.

At this point, all we've done is say we want to import two contacts and link them to the matter. This is nice, but what we really want is to set these in the appropriate lookup fields. If we click on the matter, you'll notice that now any of the lookup fields that pertain to Contacts are now enabled. When we click on the drop down for the Client field it now lets us choose which of the contacts we are importing refers to the Client.

- For the **Client** field, select **Contact** and for the **Judge** field select **Contact (2)**.
- If you don't have a judge field, simply right click the fields area and **Add a Field**. Make it a **Lookup** field and point it to the **Contact** type.

Duplicate checking

At this point we've mapped all the fields we need to. We don't actually need to map the name of the Client or Judge, even though it was included in the data because the respective contacts were imported earlier and have a name assigned. If we were to run the import at this point it would import each of the matters and create two new contacts per matter with just the Imported ID mapped. What we actually want to do is take the contacts that were imported previously and connect them to the matter.

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- Save your settings and click **Next** to get to the Duplicate Checking Screen.

Duplicate checking allows you to do two main things: find duplicates within the import data to make sure they import to a single record and find records that are already in Centerbase to link to/update them.

In this case, we don't need to do any duplicate checking on our matters as we know they are unique

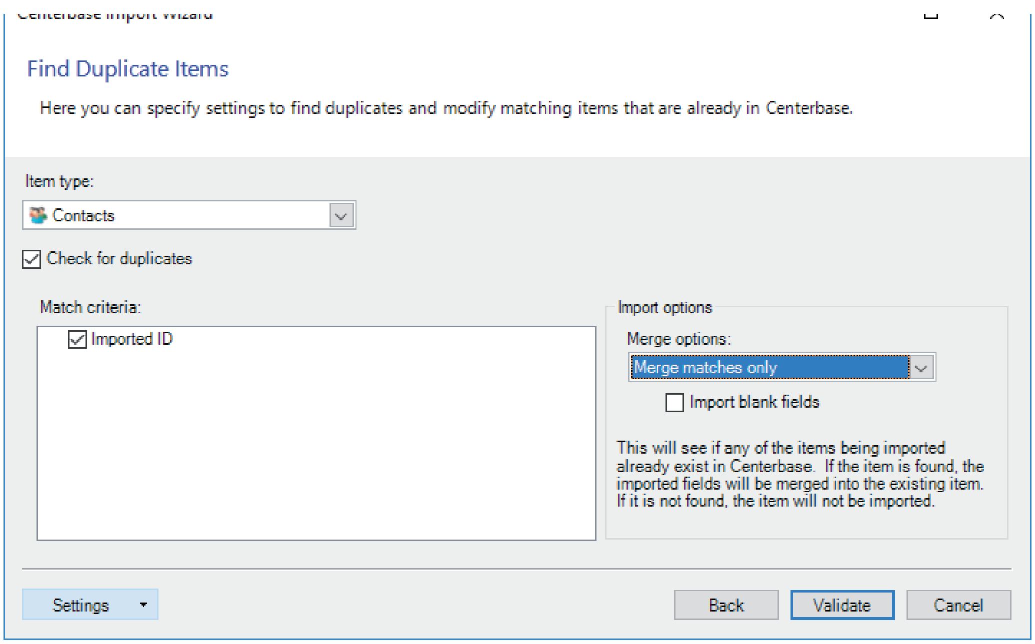
- Click **Next** without selecting any criteria.

Now we are ready to setup contacts.

- Check the box for **Check For Duplicates**.
- Now we need to specify what field we are using to find duplicates (both in Centerbase and in our source data). In this case we only imported a single field, so check **Imported ID**.

This is telling Centerbase that we want to use this field as the criteria when finding duplicate records. IDs are always best to use for this kind of check, but you can specify multiple criteria as well (such as name, e-mail address, and zip code for example). We also have the option of specifying Merge Options. This allows you to decide whether you only want to create new records (not found in Centerbase), only update existing records (found in Centerbase), or both.

- Select **Merge Matches Only**. This means it will find contacts that are in the system and connect them to the matters, but not create new contacts.
- Before moving on, make sure you click the **Settings** button and **Save Your Settings**, as this will also include the duplicate checking settings.



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Specifying Values

When we imported our original list of contacts, the source data did not have any way to specify that a given contact was a client. However, now that we are importing matters, we know that all the Contacts we are mapping the Client ID to, are clients.

- Go back to the **Field Mapping** screen by clicking the **Back** button a couple of times.
- If we click on **Contacts** in the list, we can see this is the Contact that the Client ID is mapped to.
- Right click on the **Is Client** field and select **Specify Value**. This lets you specify a value that will be set on this field for all imported records.
- Check the **Value to Set** box to set the Is Client field on all of these contacts to **True**. This same feature can be used to set any other basic field such as setting a Source field to “PC Law Export Sept 20

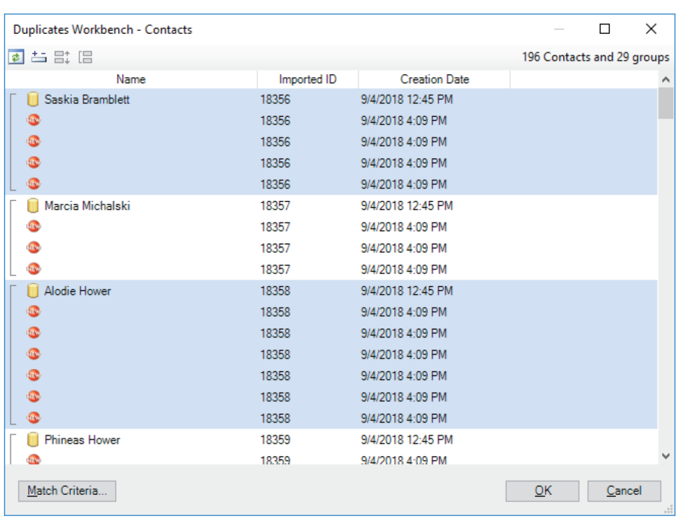
Running the Import and Performing the Duplicate Checking

Now, let’s Validate and run the Import.

- Click V**alidate** and then **Import** to run the import. This will run just like our last import going through the prepare and commit phase.

Once it is done it will automatically pop up the Duplicate Workbench. This shows us each of the duplicates it found, both within Centerbase and in the source data. The icons on the left indicate where the duplicate was found.

Let’s look at **Saskia Bramblett (ID 18356).** The yellow icon indicates that the record was found in Centerbase (this is the contact we imported in the first import we ran). The red icon indicates it came from the source data. If you open the MatterList spreadsheet, you’ll see that there are 4 matters that have Saskia listed as a client. That’s why there are 4 rows with a red icon with an Imported ID of 18356. So that means we have the 4 imported records that are going to get mapped to Saskia. You can customize the columns that show by clicking the **Column Chooser** icon.



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- Click **OK** and the merge will be processed. When using a unique ID to find duplicates, you can usually simply click OK and all the records that were found will be merged into one. In this case, each of the contacts we imported earlier will be connected to their respective matters as either a client or a judge.

When it is complete you can finish the Import Wizard as you did before. We can go back to the web version again and see the matters that were created. They should have judges and clients set and the contacts that are clients should have been marked as such.

Billing Import

Now we're ready to import some billing data. The Centerbase Import Tool lets you import basic matter AR balances, open bills, detailed billing history data, and everything in between. The type of billing import you do typically depends on what data you can get out of the old system.

- Open the **Import Wizard**.
- Upload the **MatterBalances.csv.**
- Select **Start from Scratch** on your settings.

When importing AR, even just a basic matter balance, there are several things you need to import. First let's add a Bill.

- Right click the **Centerbase Items** list and select **Add an Item.**
- Choose **Bill** and click **OK.**
- We'll start by mapping the **Balance Name** to the name of the Bill. It's best to always import something to the name of every record as it will make it easier to manage them in Centerbase.
- Right click on **Issue Date** and **Specify a Value** of **today**.
- Right click on the **Bill** and add a **Linked Item** for **Contacts** and **Matters**.
- Map the **Client ID** to the **Imported ID** of the **Contact** and the **Matter #** to the **Matter's #** field. In this case, Matter # is a unique identifier for the matters we imported.
- Finish this part by going back to the bill and setting the **Client** and **Matter** lookup fields.

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- Now's a good time to save our settings, so let's go ahead and do that by clicking **Save Settings** under the **Settings** button in the bottom left.

We've imported some basic information to the bills but haven't really affected any numbers yet. With Centerbase, you can't simply import directly to the Bill's total and/or balance, you have to add **Billing Entries** that add up to that total.

- Right click on the Bill and select **Add a Linked Item.**

- Select **Billing Entry** and click **OK**.

- Repeat this process so you have two billing entries under the bill. One will represent the fees and the other will represent the expenses. With a billing entry there are several fields that need to be filled in. We'll start with the Fees entry.

- Map the **Balance Name** to the **Name** and **Description** of the billing entry. As you can see, a single field from your source data can be mapped to multiple fields in Centerbase.

- Right click the **Entry Date** field and **Specify a Value** of **today.**

- Right click the **Class** field and **Specify a Value** of **Time.**

- We also want to set the matter on the billing entry. At this point we have linked the matter to the bill. Go to the Centerbase Items section and drag the matter on to the Billing Entry, it will link the matter to the billing entry.

- Set the **Matter** lookup field on the billing entry.

- Set the **Bill** lookup field on the billing entry.

Just as we cannot set the total directly on a bill, we also can't set the total directly on a billing entry. The total must be equal to the quantity/hours times the rate.

- Map the **Fee Balance** to the **Billable Rate** field.

- Right click **Billable Hours** and **Specify a Value** of 1.

- This will set the total of the billing entry to the total fees balance.

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- Repeat this process for **Actual Rate** and **Actual Hours**. Billing entries need to have both a billable and actual quantity/price specified.

Now we can repeat these steps for Expenses. Here's a list of the fields for quick review:

- **Balance Name** to **Name** and **Description.**
- **Expense Balance** to **Billable Rate** and **Actual Rate.**
- **Specify a value** of 1 for **Billable Hours** and **Actual Hours.**
- **Specify** today as the **Entry Date.**
- **Specify** Expense as the C**lass.**
- Link the matter to the billing entry and set the M**atter** and **Bill** lookups.

Alright, now we've got all the fields mapped, the records linked, and the lookup fields set. Now we just have a couple of duplicate checking settings to setup. There is no need to setup duplicate checking on bills or billing entries as we want those to be created fresh.

- Check the box to **Check for duplicates** on **Contacts**.
- Check the box next to the **Imported ID** to use that as our criteria.
- Set the **Merge Options** to **Merge Matches Only.**
- Repeat these steps for **Matters** and specify the **Matter #** field as the match criteria.
- **Save** your settings.
- Click **Validate** and **Import** to run the import.
- Once you've checked for duplicates and finished your import, you can go back to the web version and check out your AR Report to see the data we brought in.

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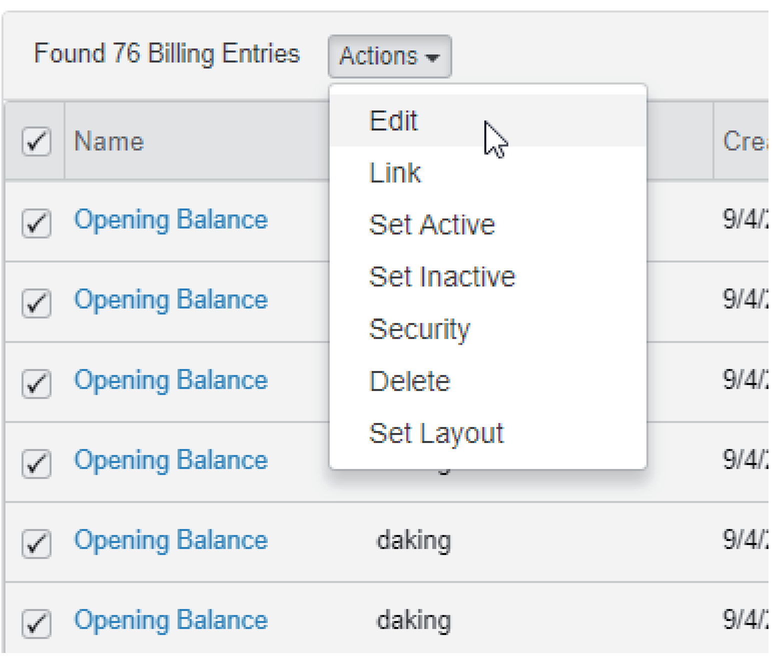
There are two other fields that are usually required on billing entry imports: timekeeper and billing code. If you have the data available, you can specify these during the import, but with a matter balance import like this, it is often easier to just post-process them.

- Click on **Billing Entries** in the Navigation Bar on the left.
- Click **Advanced Search** and Add conditions to find where the **Class** is Time and the **Creation Date** is Today. Click **Search** to run these criteria.
- Check the box in the upper left of the grid to select all of the time entries that were created today and click **Actions** -> **Edit.**
- Choose the **Timekeeper** field and set it to **your user**. If you are not able to export the timekeeper from the old system, it is usually best to set yourself. This will make it clear when the firm looks at reports like Fees Received which fees were for imported balances like this vs. new fees billed after starting with Centerbase.
- Repeat this process for all **Billing Entries** created today where the **Billing Code** is empty. Set the **Billing Code** to any appropriate billing code in your system.



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Conclusion

The Centerbase import tool gives you a variety of ways to bring in whatever data you have. As you saw, even when we got in to more complicated billing imports, the same fundamentals we learned about mapping fields, setting lookup values, and finding duplicates still applied. The techniques you used today can be adapted to import a wide variety of data, from contacts to trust transactions to calendars.

We also showcased some of the new features like being able to import to user lookup fields. We want to make the import process as powerful and simple as possible for you, and these new features are just the first in a line of import improvements we'll be rolling out. The import and its results are typically the client's first impression of Centerbase, so making this go as smoothly as possible is always a priority for us. In general, if you can get the data out of another system, we can bring it in to Centerbase.

Check out support.centerbase.com for more tutorials, tips, and tricks to help you import your client's data.