

Weatherization Assistant Version 8.9: Data Transfer

Updated: June 1, 2012

TRANSFER (EXPORT) CLIENTS TO ANOTHER USER

Clients can be transferred (exported) from one user (e.g., an agency) to another user (e.g., the state) using the Weatherization Assistant's Data Link feature and the user's own email system. When a client is transferred, all files associated with the client are also transferred, such as an audit, work order, setup library, and supply library. More than one client can be transferred at the same time.

Transferring a client does NOT remove the client from your existing database. Rather, a new database file will be created and the client information will be copied and stored to that new database. If you are an agency transferring a client to your state, you may want to include the acronym of your agency in the name of the database file (e.g., ORNL). If it is likely that you will be transferring other clients in the future, you may want to include a number or date in the name of the database file as well (e.g., ORNL3 to designate the third database file created for the ORNL agency or ORNL 06-01-2012 to designate a database file created for the ORNL agency on June 1, 2012).

You will need to save the new database file that you create on your computer where you can easily find it later so that you can attach it to an email. You may want to save the new database file in the same folder used to store the Weatherization Assistant operating system files (typically C:\ProgramData\Weatherization Assistant 8-9). Another common location is a "temporary" folder found on many computers (e.g., C:\temp) since the new database file will not be needed once you have attached it to an email.

To transfer a client and its associated information, perform the following steps:

1. From the Weatherization Assistant's Main Menu window (see Fig. 1), select the "Data Link" button to display the "Data Link" window (see Fig. 2).

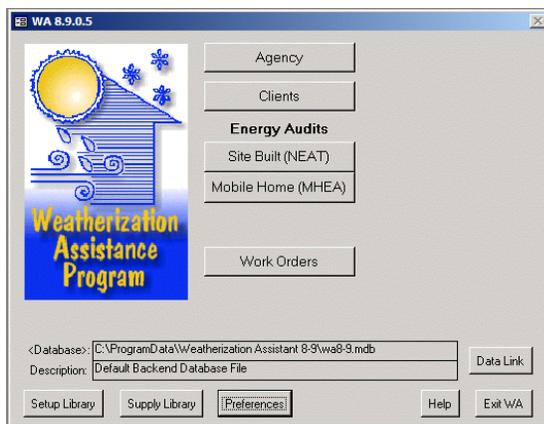


Figure 1. The Weatherization Assistant's Main Menu

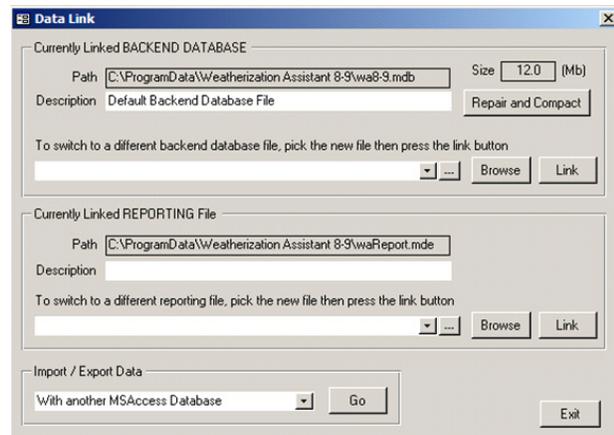


Figure 2. Data Link window

- At the bottom of the “Data Link” window, select “With another MSAccess Database” in the “Import / Export Data” field and click the “Go” button to display the “Transfer CLIENTS between databases” window (see Fig. 3).

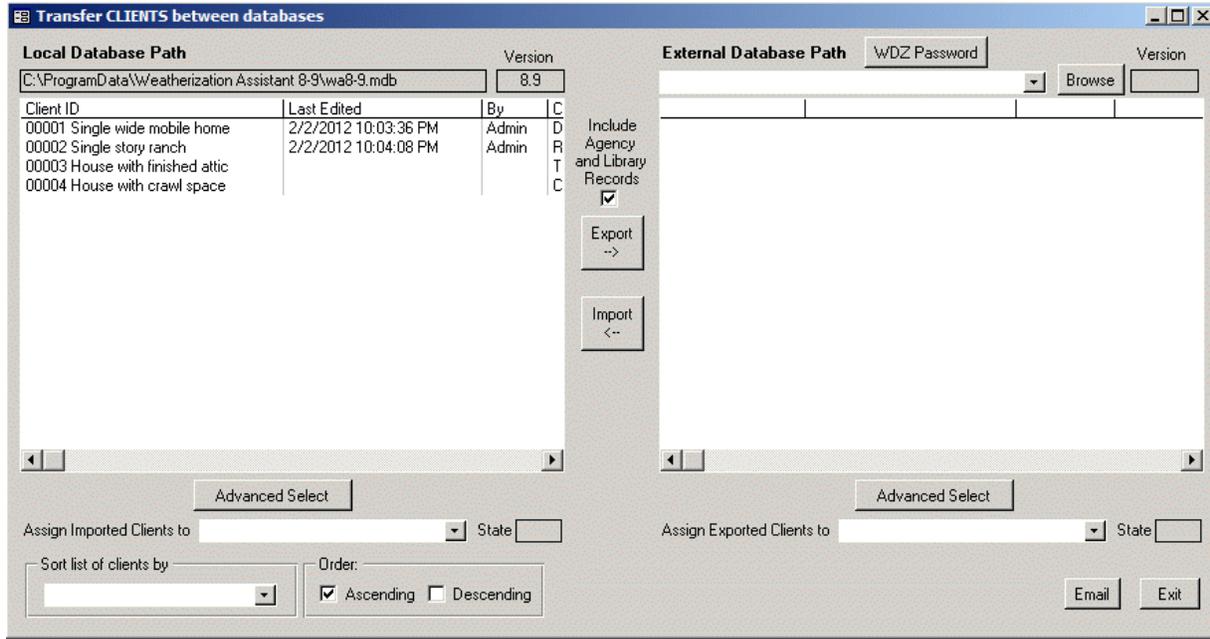


Figure 3. Transfer CLIENTS between databases window

- In the upper right corner of the "Transfer CLIENTS between databases" window, select the “Browse” button to display the "Pick External Database for Import/Export" window (see Fig. 4).

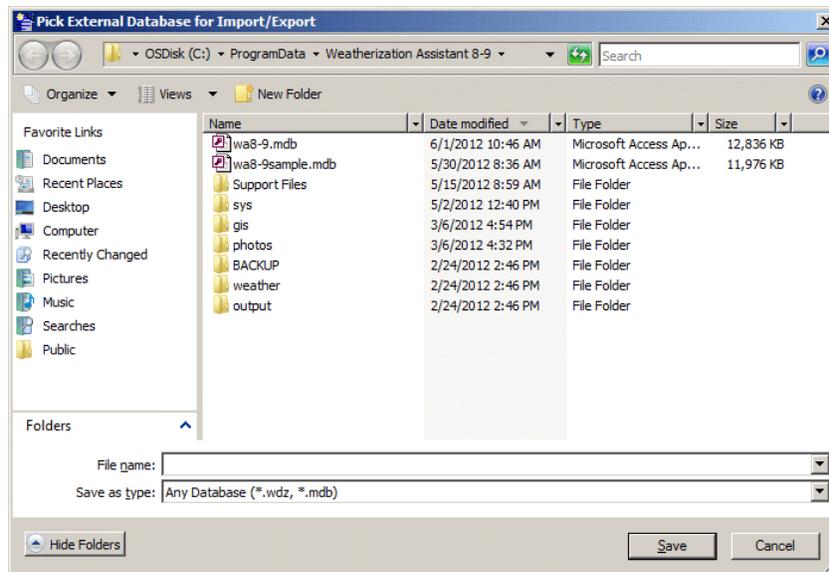


Figure 4. Pick External Database for Import/Export window

4. Use standard Windows techniques to select the folder that you want to store the new database file in. The format of this form may vary depending on the version of Windows installed on your computer and settings you may have chosen. The initial location displayed will be the location where you installed the Weatherization Assistant, normally "C:\ProgramData\Weatherization Assistant 8-9." If you have visited this form before and chosen a different location, that location will be displayed instead.
5. Click in the "File name:" field and type in the name of the new database file that you want to create. You must follow standard file naming conventions. If you are transferring a single client, the file name might include the Client ID for that client. Or, you may wish to include a form of the date the file was created.
6. Use the drop-down arrow in the "Save as type:" field to select "Zipped Weatherization Databases (*.wdz)".
7. Select the "Save" button. A "New Database" window will appear saying that "The file does not exist. Do you want to create a new blank database file so you can copy clients to that database?" (See Fig. 5). Make sure that the bullet in front of "Create New Blank Database" is filled in, and then select "OK". This will return you back to the "Transfer CLIENTS between databases" window (see Fig. 6), with the name of the database file that was created and its location (also called its path) now listed in the field beneath "External Database Path" (e.g., C:\Program Files\Weatherization Assistant 8-3\ ORNL1.wdz), although the field may not be big enough to show you all of the text.

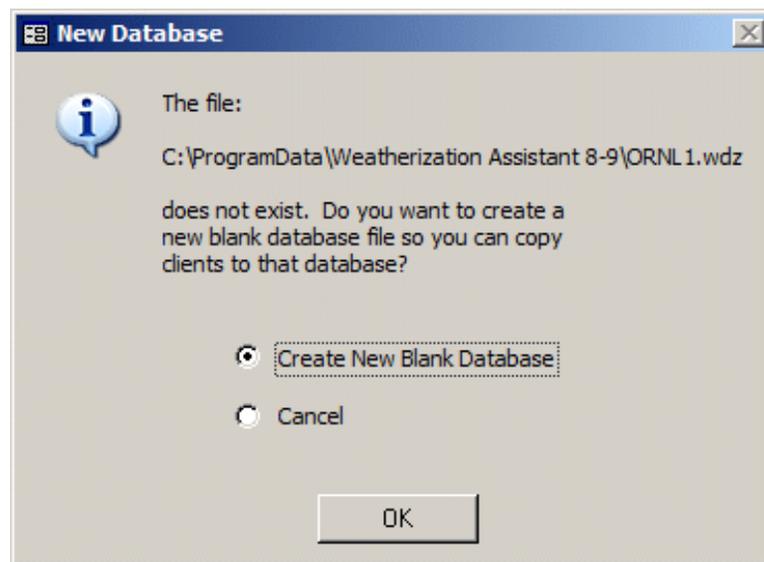


Figure 5. New Database window

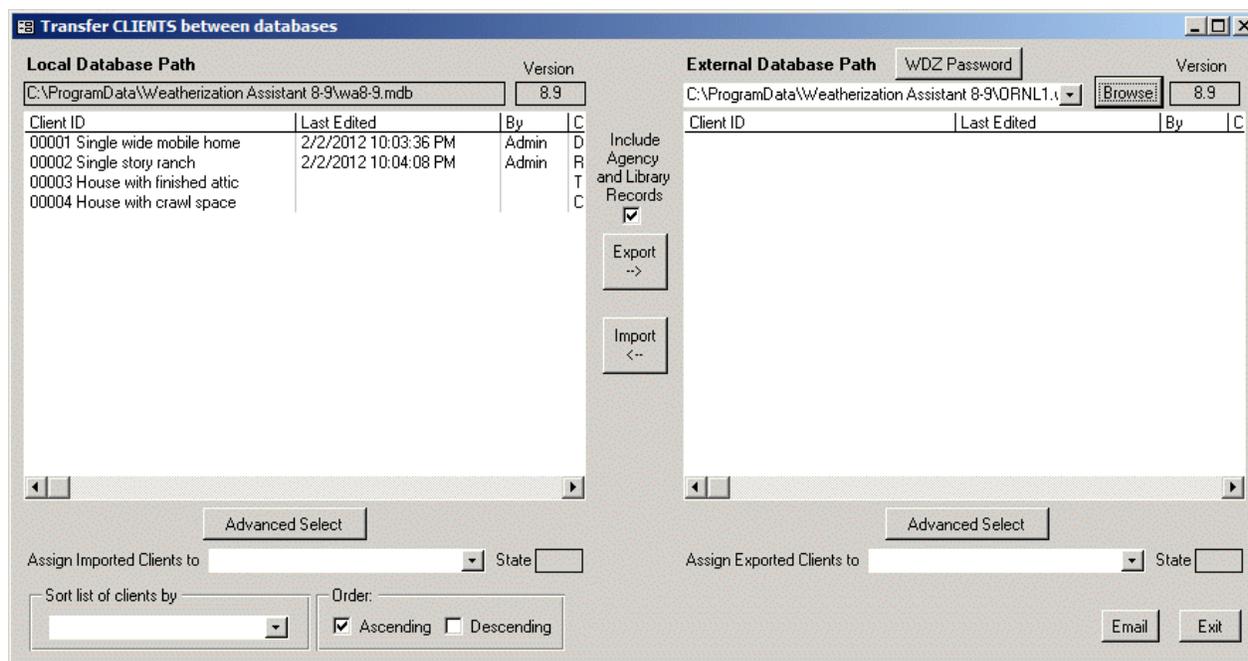


Figure 6. Transfer CLIENTS between databases window

8. All of your existing clients are listed on the left side of the “Transfer CLIENTS between databases” window. Select (i.e., highlight) a client that you want to transfer (i.e., that you want to copy to the new database) by clicking on it. Then select the “Export” button in the middle of the window. The client that was selected will now be copied to the new database that was created. When finished, the client that was transferred will be listed on the right hand side of the “Transfer CLIENTS between databases” window under "External Database Path". Repeat this step for all other clients that you want to transfer. When finished, do NOT try to email the database file just created by selecting the “Email” button because this approach doesn't work unless properly setup.

You can transfer more than one client at a time. To select consecutive clients (i.e., clients lying next to each other), click on the first client in the series and then hold the "Shift" key down while clicking on the last client in the series. Hold the "Ctrl" key down while clicking on the clients to select multiple clients which are not next to each other.

By default, the clients are listed in ascending order of their Client ID. A different sorting field can be selected using the “Sort list of clients by” field in the lower left corner, and the sorting order can be selected by checking either “Ascending” or “Descending”.

9. After all the clients have been transferred, close the "Transfer CLIENTS between databases" window by selecting the “Exit” button in the lower right corner, and then close the “Data Link” window by again selecting the “Exit” button in the lower right corner.
10. Use your email system to send the new database file to another person by attaching the file to an email. All email systems are different, but usually there is a button to attach a file to an email, with a browser to help you find the file that you want to attach.

IMPORT (RECEIVE) CLIENTS FROM ANOTHER USER

Clients can be imported (i.e., received) from another user using the Weatherization Assistant's Data Link feature. When a client is imported, all files associated with the client are also imported, such as an audit, work order, setup library, and supply library. More than one client can be imported at the same time.

Importing a client does NOT affect other clients in your existing database. Rather, when a client is imported, the new client will be stored under the same Agency Name assigned to the client when the client was created by the original user.

A client that you want to import will be saved in a database file, usually with the extension "wdz" but possibly "mdb". This file was created by another user and will usually be sent to you as an attachment to an email. Thus, in your email system, you must save the attached database file in a location that you can easily find later. You may want to save the file in the same folder used to store the Weatherization Assistant operating system files (typically C:\Program Files\Weatherization Assistant 8-3). Another common location to store these files is a "temporary" folder found on many computers (e.g., C:\temp) since the database file will not be needed once you have imported the client into your database.

To import a client and its associated information, perform the following steps:

1. From the Weatherization Assistant's Main Menu window (see Fig. 1), select the "Data Link" button to display the "Data Link" window (see Fig. 2).
2. At the bottom of the "Data Link" window, select "With another MSAccess Database" in the "Import / Export Data" field and click the "Go" button to display the "Transfer CLIENTS between databases" window (see Fig. 3).
3. In the upper right corner of the "Transfer CLIENTS between databases" window, select the "Browse" button to display the "Pick External Database for Import/Export" window (see Fig. 4).
4. Use standard Windows techniques to locate the database file that you want to import the client from. The format of this form may vary depending on the version of Windows installed on your computer and settings you may have chosen. The initial location displayed will be the location where you installed the Weatherization Assistant, normally "C:\ProgramData\Weatherization Assistant 8-9." If you have visited this form before and chosen a different location, that location will be displayed instead.

5. You may either single click on the file then select the “Save” button or simply double click on the file. Either method will return you back to the “Transfer CLIENTS between databases” window (see Fig. 6). The name of the database file that you want to import the client from and its location (also called its path) will now be listed in the field beneath “External Database Path” (e.g., C:\Program Files\Weatherization Assistant 8-9\ORNL1.wdz), although the field may not be big enough to show you all of the text.
6. All of the clients that can be imported are listed on the right side of the “Transfer CLIENTS between databases” window, while all of your existing clients are listed on the left side of the window. Select (i.e., highlight) the client on the right side of the window that you want to import (i.e., that you want to copy into your existing database) by clicking on it. Then select the “Import” button in the middle of the window. The client that was selected will now be copied into your existing database. Be patient, this may take several minutes. When finished, the client that was imported will be listed on the left hand side of the “Transfer CLIENTS between databases” window. Repeat this step for all other clients that you want to import.

You can import more than one client at a time. To select consecutive clients (i.e., clients lying next to each other), click on the first client in the series and then hold the "Shift" key down on the keyboard while clicking on the last client in the series. Hold the "Ctrl" key down on the keyboard while clicking on the clients to select multiple clients which are not next to each other.

By default, the clients are listed in ascending order of their Client ID. A different sorting field can be selected using the “Sort list of clients by” field in the lower left corner, and the sorting order can be selected by checking either “Ascending” or “Descending”.

7. After all the clients have been imported, close the "Transfer CLIENTS between databases" window by selecting the “Exit” button in the lower right corner, and then close the “Data Link” window by again selecting the “Exit” button in the lower right corner.