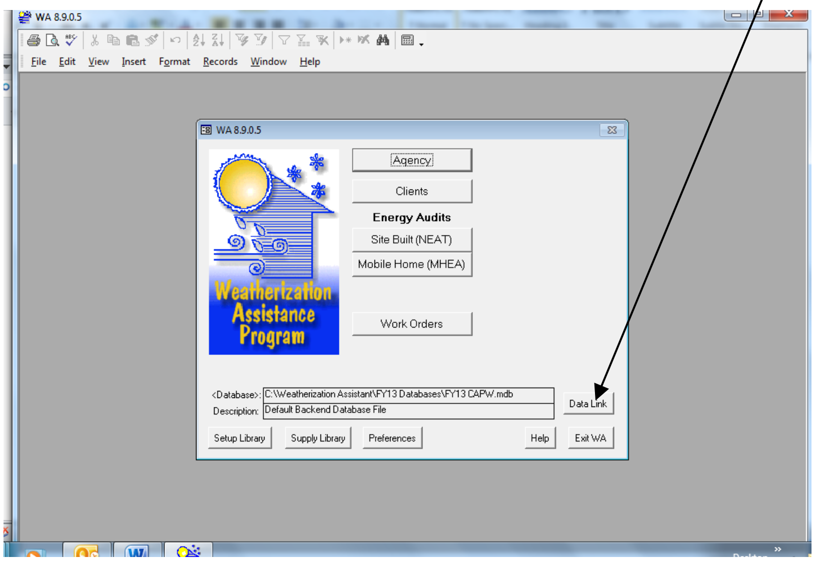
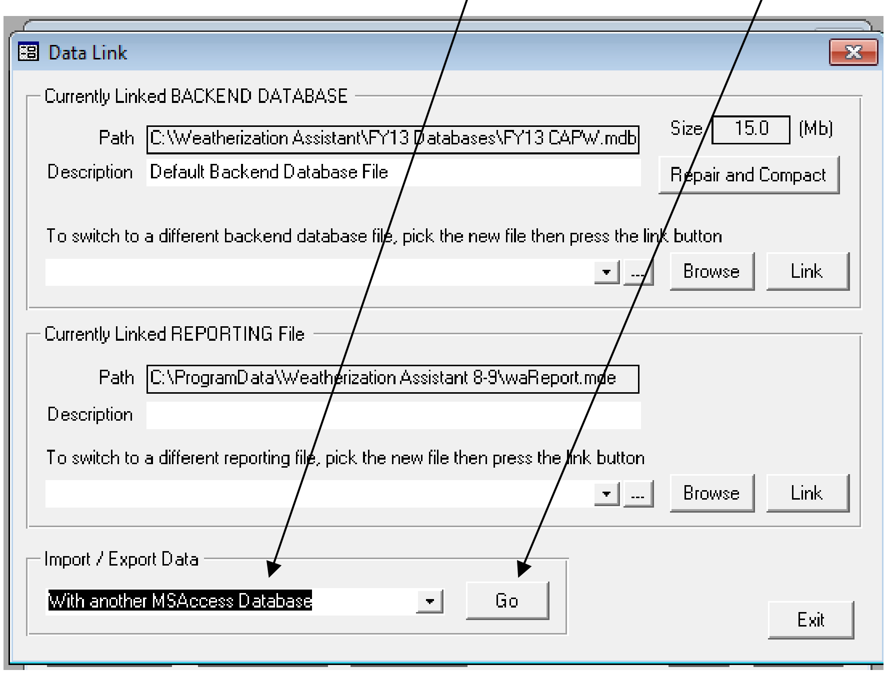
How to Import Weatherization Assistant Client Records Revised 5/30/16

The following directions should be used whenever you need to import NEAT or MHEA audits emailed or acquired from another user of the Weatherization Assistant Software. When you complete an import, you are actually unzipping a database that includes all information related to the client record that is selected. This information includes the agency record and all audits assigned to the client as well as the supply and setup libraries used by the audits.

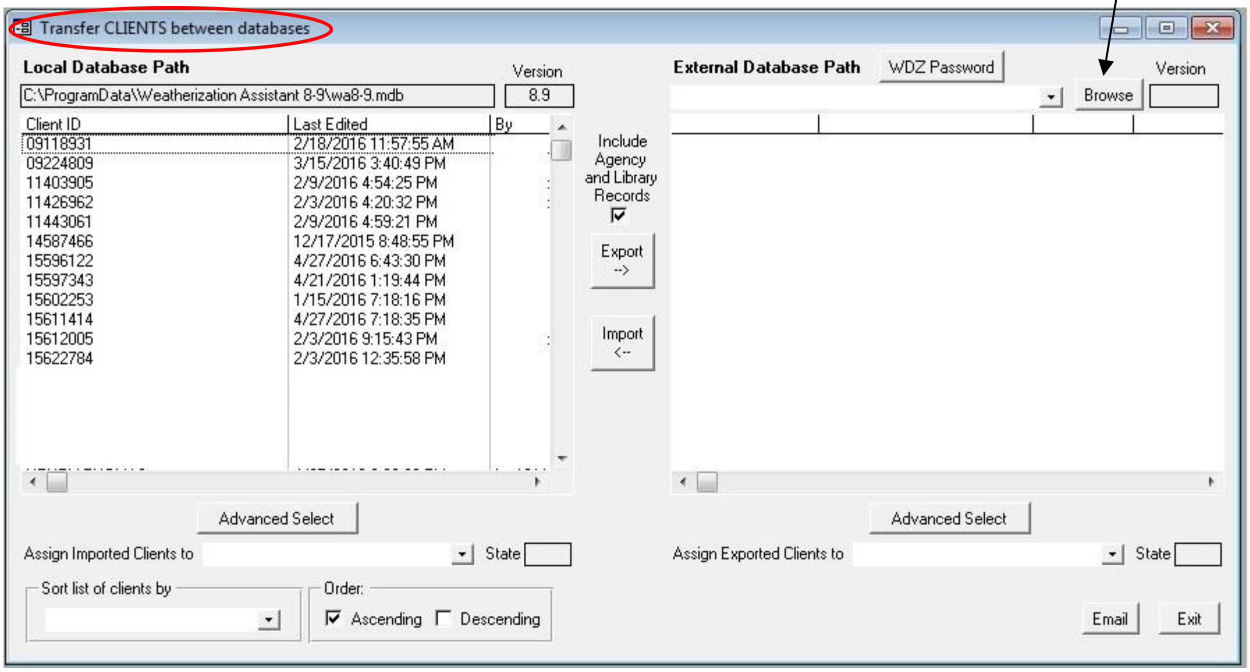
1. Select "Data Link" from the main Weatherization Assistant menu.



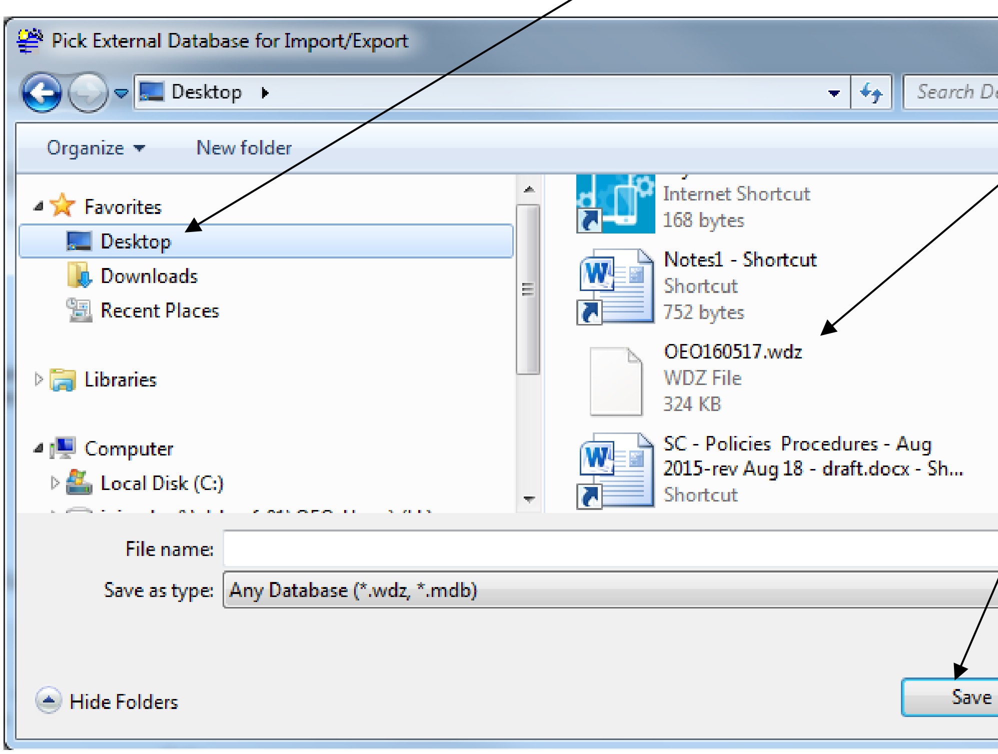
2. Select "With another MSAccess Database" and click "Go"



3. You will see a window labeled “Transfer between databases.” The first thing to do is to locate the zipped database file to be imported. Click on the “Browse” button to locate the WDZ file that contains the client records to be imported into your database.



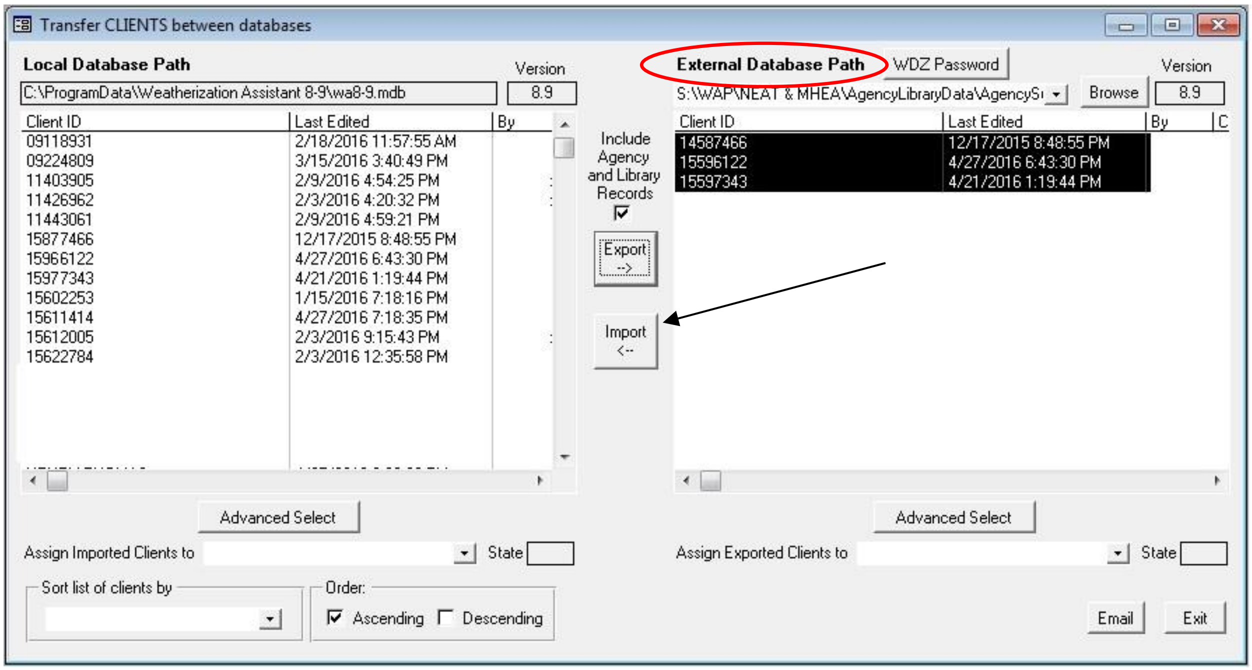
4. Select the folder location that contains the WDZ file to be imported.



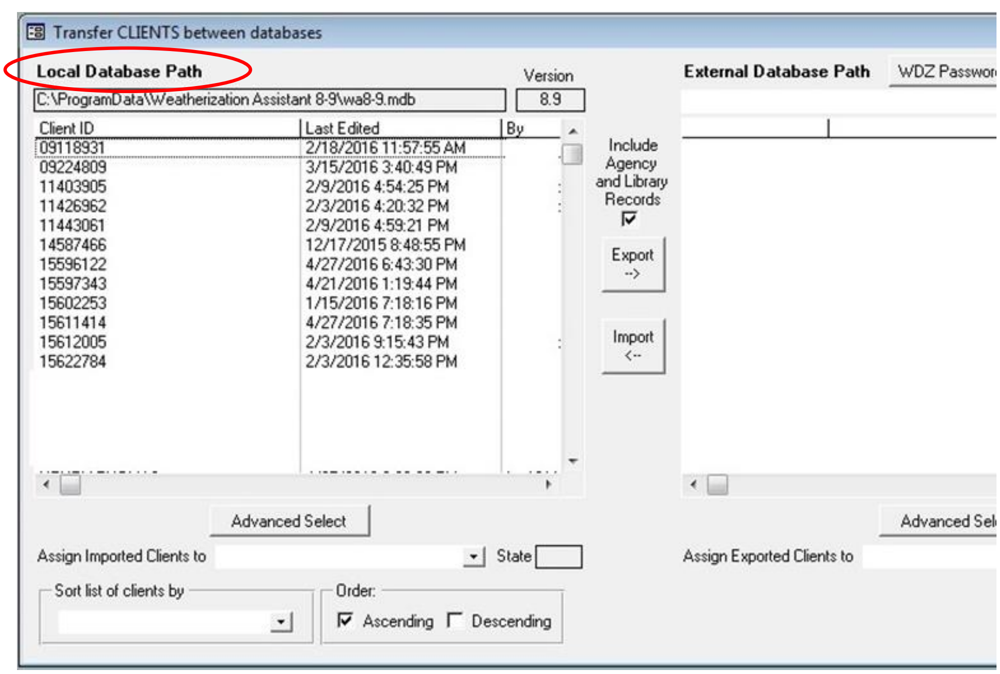
Double click on the file to be imported,

or Highlight and click “Save.”

5. Next, highlight the jobs to be imported on the right-hand side of the screen under “External Database Path”. Click the “Import” button to copy the client records into the database that the WA software is linked to. (Note: to select multiple records, hold the CRTL key down and click each one—or just click on the first and last jobs in a sequential range while holding down SHIFT.)

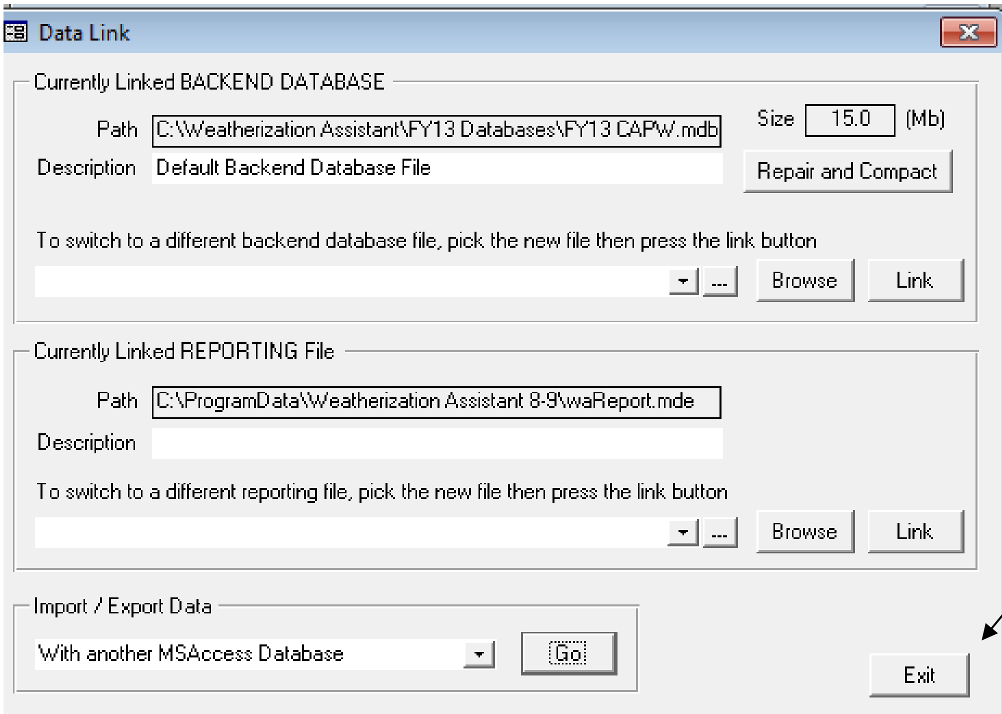


If the client record already exists it will be “edited” to whatever data is in the imported file. (Most of the time, you will want to check the “Include Agency and Library Records” box. If you do **not** want to overwrite agency or library information, make sure this box is NOT checked. Also, if importing previous year records, do not check this box.)



6. All of the jobs imported from the right-hand side should now appear on the left-hand side under “Local Database Path.”

You can now exit this window.



7. Exit out of the Data Link screen.

8. If you are finished with importing client records, you can now open any of the client records or audits that were imported from the main menu screen of the WA Software.

Please note that if you did not import the agency or library information in Step 5, you will need to make sure that these values are selected in the imported records as needed.