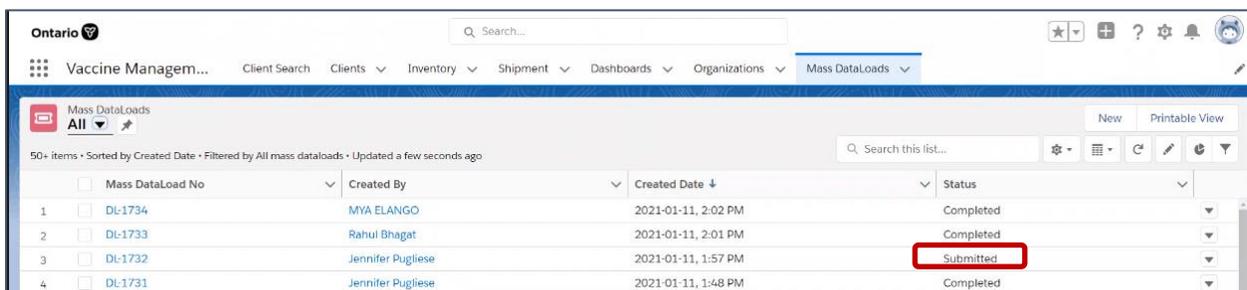


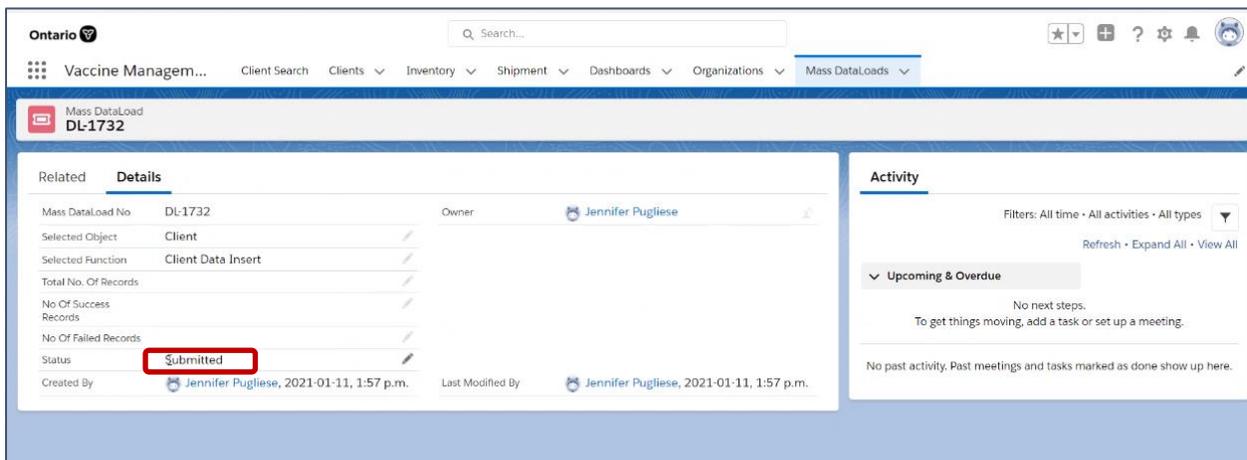
CLIENTS Template Upload Troubleshooting Guide

Overview

From time to time, users uploading CLIENTS templates into COVaxON receive a status of 'Submitted' (rather than 'Completed') when viewing their recently uploaded file on the **Mass Data Loads** list.



Mass DataLoad No	Created By	Created Date	Status
1 DL-1734	MYA ELANGO	2021-01-11, 2:02 PM	Completed
2 DL-1733	Rahul Bhagat	2021-01-11, 2:01 PM	Completed
3 DL-1732	Jennifer Pugliese	2021-01-11, 1:57 PM	Submitted
4 DL-1731	Jennifer Pugliese	2021-01-11, 1:48 PM	Completed



Related	Details
Mass DataLoad No	DL-1732
Selected Object	Client
Selected Function	Client Data Insert
Total No. Of Records	
No Of Success Records	
No Of Failed Records	
Status	Submitted
Created By	Jennifer Pugliese, 2021-01-11, 1:57 p.m.
Last Modified By	Jennifer Pugliese, 2021-01-11, 1:57 p.m.

This intermittent problem¹ is usually the result of an encoding file format issue, where the uploaded .csv file is not in the UTF-8 format required by COVaxON. To change the status from 'Submitted' to 'Completed' requires that the file be reformatted and re-uploaded to the system.

IMPORTANT! When saving your CLIENTS file, from the **Save As** file type options, select **CSV (comma delimited)**. Do *not* choose CSV UTF-8 as this will actually save it as a UTF-8 BOM file which is not compatible for upload into COVaxON.

¹ You may have uploaded many files successfully in the past. This issue appears periodically regardless of your past experience with uploads.

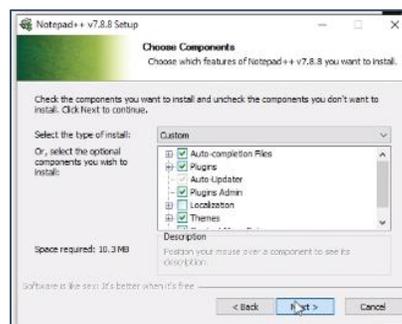
Pre-requisites

If you are using MS Windows, You must have **Notepad++** downloaded to your PC. If you do not have permissions to download applications to your PC, you can use the *portable* version of Notepad++. Please note that the steps to reformat your upload file are slightly different depending on whether you are using the full or portable version of Notepad++.

1. **If you have permissions to download applications to your PC**, follow these steps to download the **Full Notepad++** version.:
 - a. Go to <https://notepad-plus-plus.org/downloads/v7.8.8/>
 - b. Download the **64-bit x64 version** (7.8.8 release²) of Notepad++ by clicking on **Installer**.



- c. Accept all the defaults, then click **Install**.



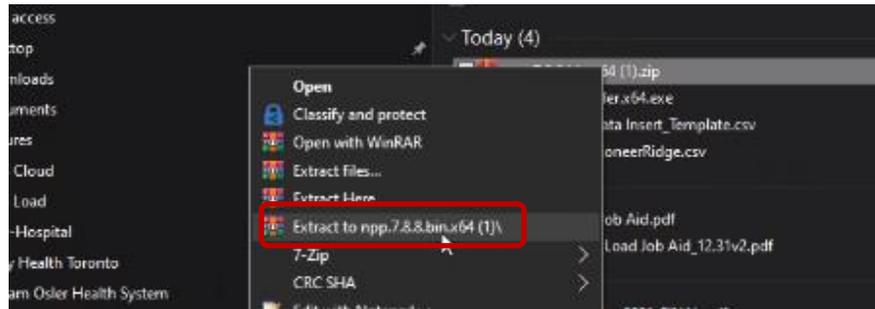
² Release 6.9.2 may also be used

2. If you do not have permissions to download applications to your PC, follow these steps to download the **Portable Notepad++** version:

- a. Go to <https://notepad-plus-plus.org/downloads/v7.8.8/>
- b. Download the portable 64-bit x64 version (7.88 release³) of Notepad++ by clicking on **Portable (zip)**.



- c. Navigate to the directory on your PC where you downloaded the Notepad++ file.
- d. Select the .zip file, **right click**, and then select **Extract to npp.7.8.8.binx64(1)**.

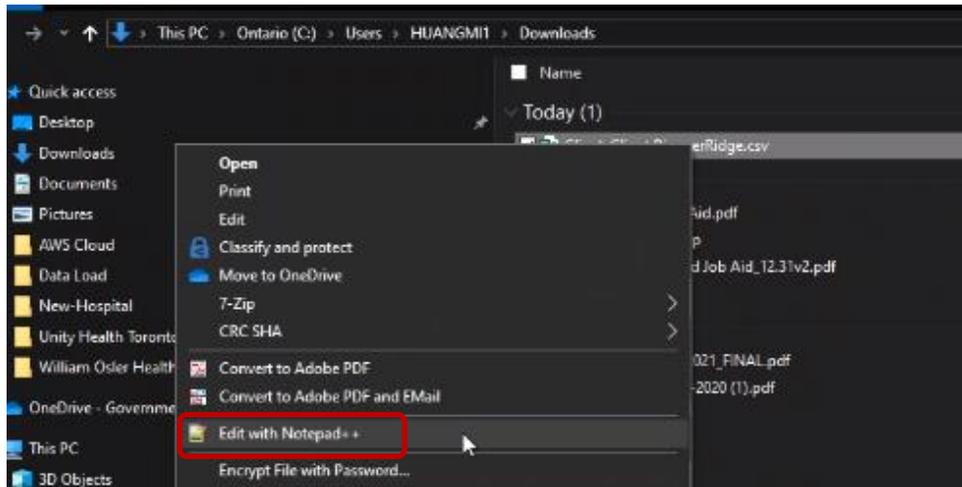


- e. Specify a folder and and extract the downloaded file.

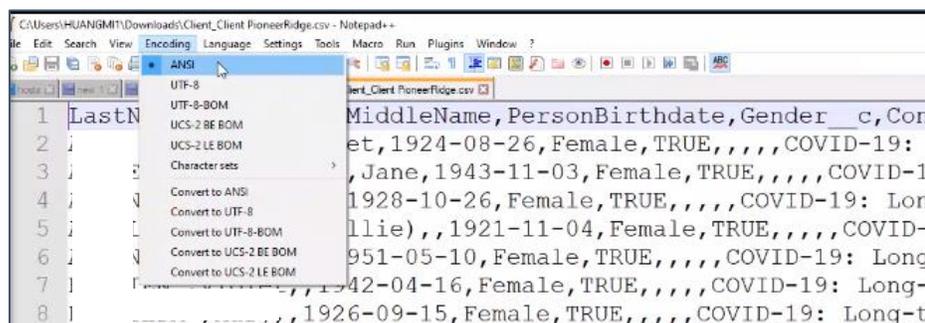
³ Release 6.9.2 may also be used

Using Full Notepad++ to resolve the issue

1. Navigate to the directory on your PC where you have saved your uploaded .csv file.
2. Select the file, **right click**, and then select **Edit with Notepad++**.



3. The selected file will open and be displayed in Notepad++.
4. Click on **Encoding** from the menu. You may notice that the current file format is ANSI.
5. Select **Convert to UTF-8** from the list. (Please do not select *UTF-8* from the top of the menu; you must select *Convert to UTF-8* from the lower half of the menu.)



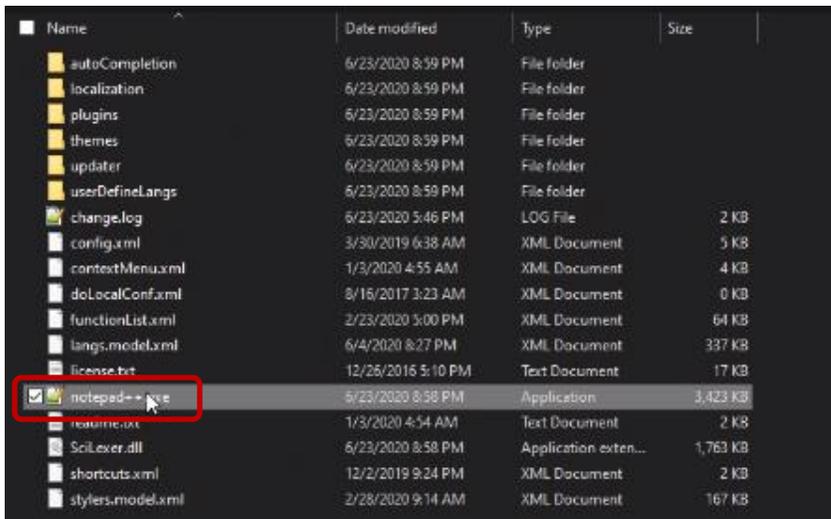
6. Select **File** from the menu, then **Save**.
7. Select **File** from the menu, then **Save**.

IMPORTANT! Please use Notepad++ to *convert* the file (i.e., encode the .csv file). Do not use it for any other purpose (modifying date formats, etc.).

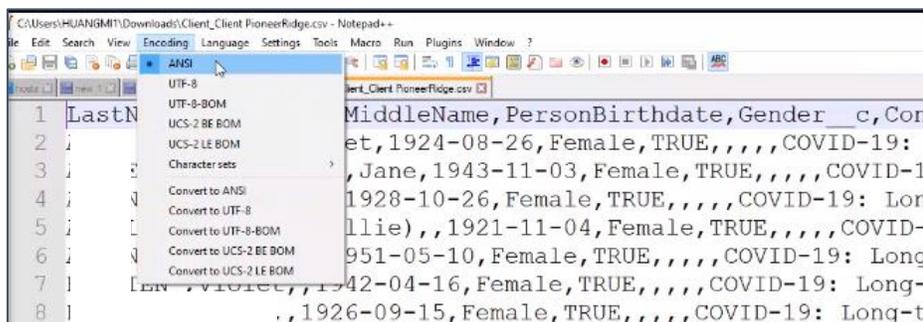
8. **Close** the file in Notepad++, and then open the converted .csv file, which is now in the correct format, from your directory.
9. You can now continue with the upload process into COVaxON.

Using Portable Notepad++ to resolve the issue

1. From the directory where you extracted the portable Notepad++ application, **double click** on the **notepad++.exe** file.



2. Notepad++ is now open.
3. Click **File** from the menu, then click **Open** and navigate to the .csv upload file.
4. Select the .csv upload file and click **Open**.
5. Click on **Encoding** from the menu. You may notice that the current file format is ANSI.



6. Select **Convert to UTF-8** from the list. (Please do not select *UTF-8* from the top of the menu; you must select *Convert to UFT-8* from the lower half of the menu.)
7. Select **File** from the menu, then **Save**.

IMPORTANT! Please use Notepad++ to *convert* the file (i.e., encode the .csv file). Do not use it for any other purpose (modifying date formats, etc.).

8. **Close** the file in Notepad++, and then open the converted .csv file, which is now in the correct format, from your directory.
9. You can now continue with the upload process into COVaxON.

Note: Occasionally when using the portable Notepad++ for the first time, the application may not allow you to save the file. Follow these steps to resolve the issue:

- a. Select **File**, then select **Save As**, then select **Text File**. The option to Save As a .csv file is not available in Notepad++.
- b. From the location where you saved the file, **right click** on the file, and select **Rename** from the menu.
- c. Modify the file extension from '.txt' to '.csv'.
- d. The file is now ready for upload into COVaxON.

Error Messages

Occasionally, an error message will be presented when you select an upload file in COVaxON to review it's status.



To resolve this error, please follow these steps:

1. Click on the **X** in the upper right to close the error window.
2. Click on the **Related** tab (to the left of the open Details tab).
3. Download a copy of the submitted file.
4. Follow the steps to resolve the 'Submitted' status error using either the Full or Portable version of Notepad++.