

# **CLIENTS Template Upload Troubleshooting Guide**

### **Overview**

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

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4 DI-1731		Jennifer Puglie	se	2021-01-11, 1:48 PM			Completed				
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This intermittent problem<sup>1</sup> is usually the result of an encoding file format issue, where the uploaded .csv file is not in the UTF-8 format required by COVax<sub>ON</sub>. 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 <u>not</u> choose CSV UTF-8 as this will actually save it as a UTF-8 BOM file which is not compatible for upload into COVax<sub>ON</sub>.

<sup>&</sup>lt;sup>1</sup> 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++.

- 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 release<sup>2</sup>) of Notepad++ by clicking on **Installer**.



c. Accept all the defaults, then click Install.



<sup>&</sup>lt;sup>2</sup> Release 6.9.2 may also be used

- 2. If you do <u>not</u> 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 release<sup>3</sup>) 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)\.

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

<sup>&</sup>lt;sup>3</sup> 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 UFT-8 from* the lower half of the menu.)

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

**IMPORTANT!** Please use Notepad++ to *convert* the file (i.e., encode the .csv file). Do <u>not</u> 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  $COVax_{ON}$ .

# 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.

Name	Date modified	Type	Size
autoCompletion	6/23/2020 8:59 PM	File folder	
localization	6/23/2020 & 59 PM	File folder	
plugins .	6/23/2020 & 59 PM	File folder	
themes	5/23/2020 & 59 PM	File folder	
updater	6/23/2020 8:59 PM	File folder	
userDefineLangs	6/23/2020 8:59 PM	File folder	
🔐 change.log	6/23/2020 5:46 PM	LOG File	2 KB
config.aml	3/30/2019 6:38 AM	XML Document	5 KB
ContextMenu.xml	1/3/2020 4:55 AM	XML Document	4 KB
doLocalConf.xml	8/16/2017 3:23 AM	XML Document	0 KB
functionList.xml	2/23/2020 5:00 PM	XML Document	64 KB
angs.model.xml	6/4/2020 & 27 PM	XML Document	337 KB
Eicense.txt	12/26/2016 5:10 PM	Text Document	17 KB
🖉 🎬 notepad++ 🔤e	6/23/2020 8:58 PM	Application	3,423 KB
Teaurre.ixt	1/3/2020 4:54 AM	Text Document	2 KB
SciLexer.dll	6/23/2020 & 58 PM	Application exten	1,763 KB
shortcuts.xml	12/2/2019 9:24 PM	XML Document	2 KB
stylers.model.xml	2/28/2020 9:14 AM	XML Document	167 KB

- 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.

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	8	1	,192	6-09-15, Female, TRUE, ,,,, COVID-19: Long-te

- 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 <u>not</u> 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 COVax<sub>ON</sub>.

**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 A**s, 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  $COVax_{ON}$ .

#### **Error Messages**

Occasionally, an error message will be presented when you select an upload file in COVax<sub>ON</sub> to review it's status.

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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 reslove the 'Submitted' status error using either the Full or Portable version of Notepad++.