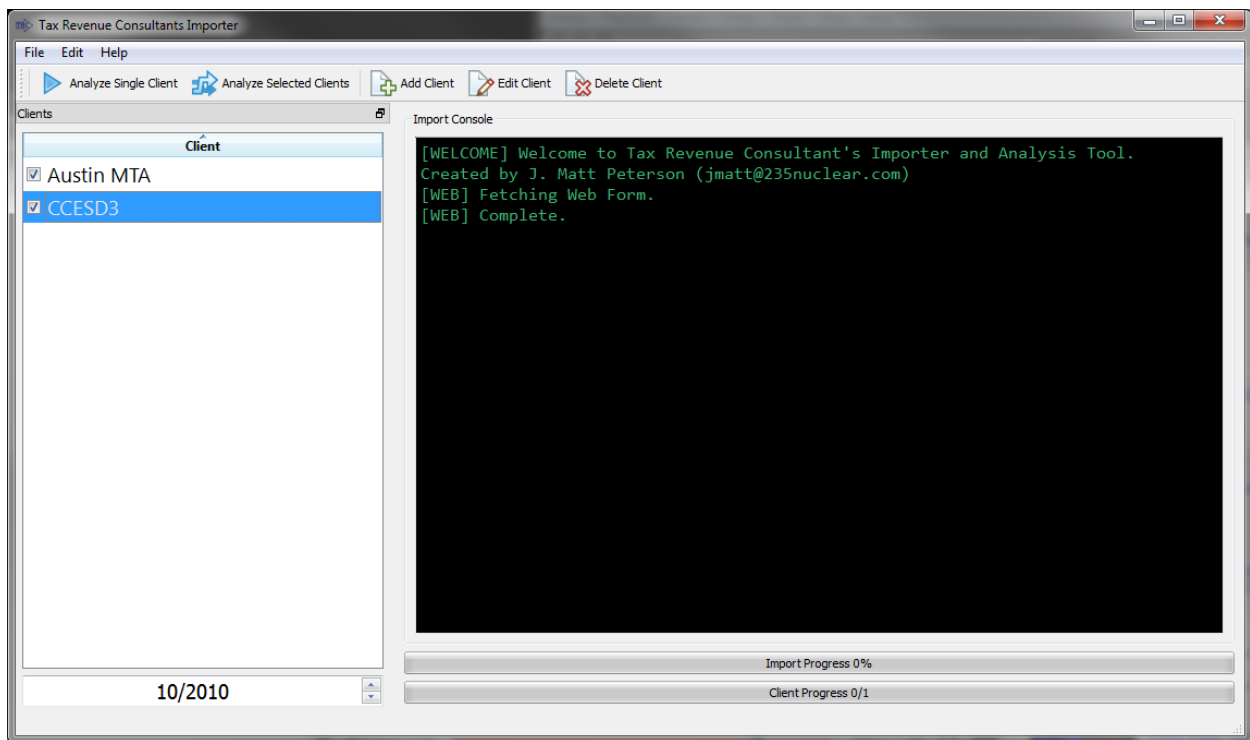


# Tax Revenue Consultants Importer

Tax Revenue Consultants Importer (timporter) is an application that imports CSV files to Excel and retrieves information from the web then does analysis with that data.

## Main Window



The main window is shown when the application is first started. It is central to using the application. It contains application menus, a tool bar, the client control, the date control and the import console.

## CLIENT CONTROL

The client control is located on the left side of the main window. The client's checkbox is used to decide whether a client will be analyzed when using the [ANALYZE SELECTED CLIENTS](#) command. The selected client will be used when using the [ADD CLIENT](#), [EDIT CLIENT](#), [DELETE CLIENT](#) and [ANALYZE SINGLE CLIENT](#) commands. Double clicking a client will use the [EDIT CLIENT](#) command.

## DATE CONTROL

The date control can be found below the client control. The date control defaults to the current month and current year. The date control allows the user to select the date for Analysis. This allows for running analysis earlier or later than scheduled. Note that the website information is independent of the date selected. The application has no control over the 3<sup>rd</sup> party website and the date range of data it provides.

## IMPORT CONSOLE

The import console provides more detailed information on the status and progress of commands. See the Import Console section below for additional details.

## Client Window

The screenshot shows a window titled "Client Add/Edit" with the following sections and fields:

- Client Information**
  - Name: CCESD3
  - Client Type: Special Purpose District
  - CSV File: C:/Users/jmatt/dev/nuclear/contract/trc/trcimporter/D5046569.TXT
  - Export Directory: C:/Users/jmatt/Desktop
- City or County Detail**
  - City or County: City of
- MTA/CTD/CTA Detail**
  - MTA/CTD/CTAs:
- Special Purpose District Details**
  - Special Purpose Districts: Comal Co Esd 3

Buttons: OK, Cancel

The client window allows the user to add and edit client information. The client information is then used to acquire the correct information from the [Allocation Payment Detail website](#). Use the [ADD CLIENT](#) command to add a new client. Double click the client's name in the client control or use the [EDIT CLIENT](#) command to edit an existing client. Make sure to hit OK to save changes to a client. To delete a client use the [DELETE CLIENT](#) command.

## NAME

This is the logical name that will be used by the rest of the application. Note that this name may sometimes be shortened in Excel files due to its limitations.

## CLIENT TYPE

There are four different client types. These types are directly related to the types found at the [Allocation Payment Detail website](#). They are **City or County**, **MTA/CTD/CTA**, **Special Purpose District**. There is an additional type **None** if no other types apply. Note that there is currently no functionality for **None**.

## CSV FILE

This is the name of the CSV file that will be used during analysis.

## EXPORT DIRECTORY

This is the directory where new files will be created.

## CITY OR COUNTY DETAIL

Select **City** or **County** in the dropdown menu then enter the city or county name. See [Allocation Payment Detail website](#) .

## MTA/CTD/CTA DETAIL

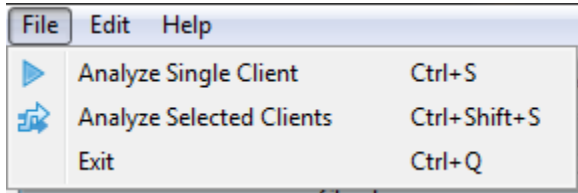
Select the appropriate MTA/CTD/CTA from the dropdown menu. See [Allocation Payment Detail website](#).

## SPECIAL PURPOSE DISTRICT DETAILS

Select the appropriate SPD from the dropdown menu. See [Allocation Payment Detail website](#).

# Commands

## FILE MENU



### ANALYZE SINGLE CLIENT

Performs most of the importing and initial analysis in timporter.

It uses the CSV file to create an excel file. It populates the Raw worksheet with data from the CSV file. Then it uses the client type and detail information to get additional information from the web and create the AD History worksheet. Next it uses the Raw worksheet to create a pivot table in the Pivot worksheet. Next it uses the pivot table and AD History worksheet to create the Rank worksheet. Next it uses the Rank worksheet to create the NAICS worksheet. Next it creates related graphics and does additional analysis and formatting. Finally it takes the AD History information and put it in the historic data location excel file.

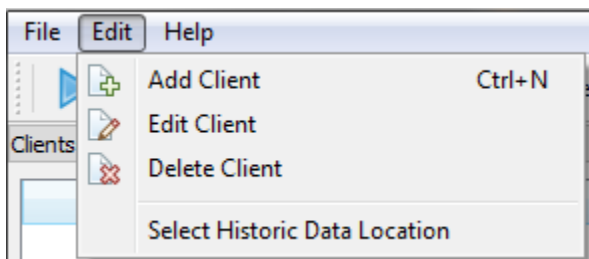
### ANALYZE SELECTED CLIENTS

Performs analysis on each of the checked clients. See [ANALYZE SINGLE CLIENT](#) for details. Note that the historic data location excel file will have information in a separate worksheet from each selected client.

### EXIT

Exit the application.

## EDIT MENU



### ADD CLIENT

Create a new client using the client window then add that client to the client control. To add the client use the Ok button. To not add the client use the Cancel button.

### EDIT CLIENT

Edit the selected client using the client window. To make the changes in the client window use the Ok button. To not make changes to the client use the Cancel button.

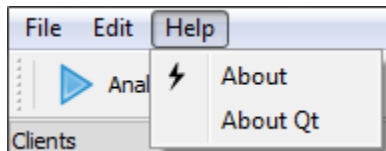
### DELETE CLIENT

Delete the selected client. There is a warning before deletion. You must say yes to delete the client.

### SELECT HISTORIC DATA LOCATION

Selects the directory where the Historic Data file will be created. The historic data file contains the AD History information for all the clients analyzed using the [ANALYZE SELECTED CLIENTS](#) command.

### HELP MENU



### ABOUT

This window will show the about information for the application. Including contact and copyright information.

### ABOUT QT

Qt is a software framework that I used when creating this application. Part of the licensing of this application requires me to provide this information.

## Requirements

WINDOWS XP – WINDOWS 7

OFFICE 2003 – OFFICE 2010

## Recommendations

### GENERAL

Close Excel before running.

Do not open excel files until timporter is complete.

### [ERROR] IN CONSOLE OR CRASH

If there are problems:

1. Log out and log back in and try again.
2. Restart your computer and try again.
3. Report problem to [jmatt@235nuclear.com](mailto:jmatt@235nuclear.com) (see contact information)

# Import Console

## COLORS

**Red** represents an error about the application's status or progress. The application will be unable to complete its task due to this error.

**Orange** represents a warning about the application's status or progress. Examples are no internet access or an unusual result. The application may or may not be able to complete its task. If there are problems then they are likely related to the warning.

**Green** represents information about the application's status or progress. Information is provided so that the user knows the status of the application and is aware of certain tasks like accessing the internet.

**Cyan** represents results. An example is the summary. The most pertinent information is summarized and provided for the user.

## CODES

[ERROR] indicates an error message.

[WARNING] indicates a warning message.

[WEB] indicates a message related to accessing or parsing information from the web.

[DATA] indicates a message that is providing feedback about the status of a task.

[SUMMARY] indicates a message that is summarizing and providing results for a task.

[DEBUG] indicates messages that are meant to help debug and provide additional information to use when fixing or adding features to the application.



## Shortcuts

Ctrl+S	Analyze Single Client
Ctrl+Shift+S	Analyze Selected Clients
Ctrl+Q	Exit
Ctrl+N	Add Client

## Contact Information

### EMAIL

[jmatt@235nuclear.com](mailto:jmatt@235nuclear.com)

[jmatt@jmatt.org](mailto:jmatt@jmatt.org)

### WEB

[235nuclear.com](http://235nuclear.com)

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