



DATA IMPORT WIZARD USER GUIDE

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First Published - May 2008

Version - 1.00

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

HOW TO READ THIS MANUAL

This manual uses the following conventions to describe, identify and highlight terms and operating procedures.

Keys

The keyboard keys are used in the text to describe many computer operations. Icons identify the key as they appear on the keyboard, when used in procedures. For example  identifies the **[Enter]** key. When keyboard keys are referred to in body text of the document, they will be identified in text, such as **[Back]** or **[Next]**.

Key Operations




Some of the operations require you to simultaneously use two or more keys. We identify such operations by an icon of the key separated by a plus sign (+). For example,  +  indicates that you must hold down the **[Ctrl]** key on the keyboard and at the same time press the letter **[C]**.

If three keys are used, hold down the first two keys and then press the third key. Be careful to only press the third key once; do not hold it down also, as this will repeat the action.

ABC When procedures require an action such as entering text, the text you are to type is represented in the type face you see to the left.

ABC When procedures require an action such as selecting an item (perhaps from a list) or ticking/un-ticking an option, then the label against such an option is represented in the type face you see on the left.

Buttons

The buttons will be shown as an image. For example the **[Next]** button will be indicated by . If a button has a shortcut key then the letter of the button is underlined. For example, the letter N in the **[Next]** button is underlined, indicating that the button can be invoked by pressing  + .

Messages

Messages are used in this manual to bring important information to your attention. Each type of message is identified as:

CAUTION: Pay attention! A caution informs you that improper use of software or failure to follow instructions may cause data loss.

NOTE: *Please read. A note is a hint or advice that helps you make best use of the software and/or it may also inform about the changes (addition or modification) that the software has carried out to the environment and may be important for proper running of the software.*

INTRODUCTION

Overview

organiseit interfaces with third-party applications either by “Pull Process” or “Push Process”. Import Wizard facilitates configuring organiseit application to interface using the “Pull Process”. The “Pull Process” can import data from Microsoft Access, Microsoft SQL Server 2000 and above, Excel File and CSV/Text File.

The “Pull Process” once configured will import data from third-party databases and populate organiseit database with folders and keywords for the entities of the third-party database.

E.g., if a third-party application is a CRM application wherein you record the Customer Details, and also store their Invoice and or Order Numbers, this information can be imported into organiseit and a folder created for each Customer in the CRM database and the Invoice and the Order Number will become the keywords which you can tag/attach it to document that will be stored in that customer’s folder in organiseit database.

The main purpose of this wizard is to configure the “Pull Process” to enable organiseit to import data from third-party application’s database.

This wizard facilitates:

- Capturing Source Database Details
 - Source Type
 - Source Database Name and Path
 - Source Database Credentials, if any
- Destination Database Details - organiseit database
- Target folder and template selection
- Task creation/modification (Task of Importing Data into organiseit database)
- Scheduling the Task

CHAPTER 1: LOGGING IN TO THE *organiseit* DATA IMPORT WIZARD

The following section looks at the login procedure and describes the resulting screens. This will cover:

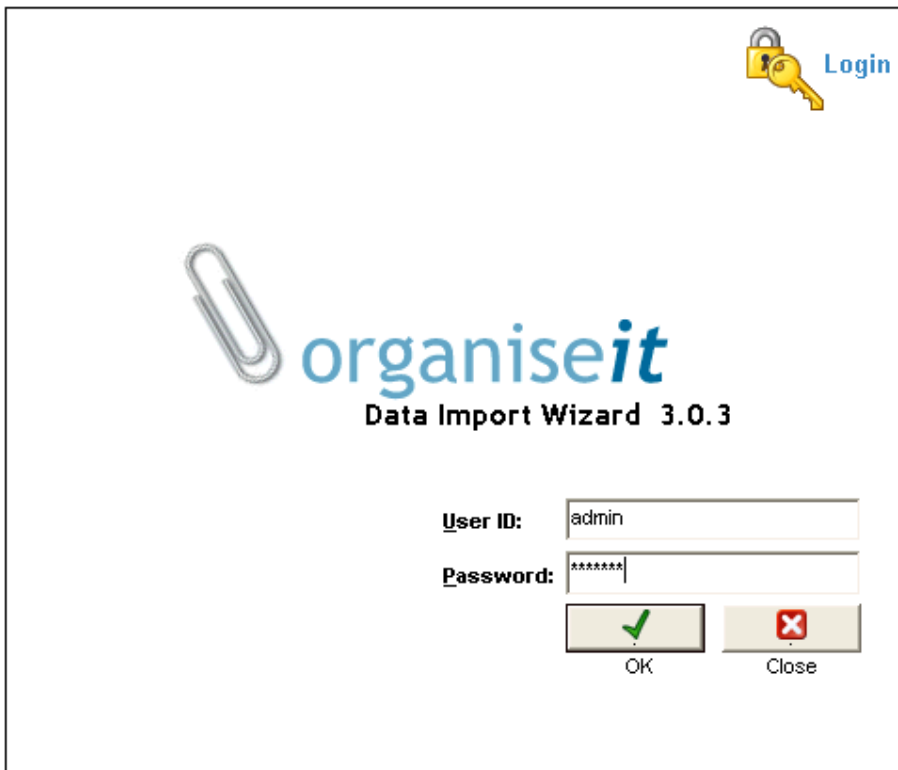
- logging in
- the *import wizard* welcome screen

1.1 LOGGING IN

Logging in to the *organiseit Data Import Wizard* is the first step in enabling you to access the functionality. To log in to the wizard, you will need a valid user name and password. The intended user of this wizard is the user “*Admin*”.


- 1 Locate and double-click on the *organiseit Data Import Wizard* icon

You will now see the *organiseit Data Import Wizard Login* screen. The built-in *organiseit* user *Admin* is the only valid user to execute this application...




The screenshot shows the login interface for the *organiseit Data Import Wizard 3.0.3*. The title bar includes a yellow key icon and the word "Login". The main area contains the "organiseit" logo (a paperclip icon followed by the text "organiseit") and "Data Import Wizard 3.0.3" below it. There are two input fields: "User ID:" with the text "admin" and "Password:" with "*****". At the bottom, there are two buttons: "OK" with a green checkmark icon and "Close" with a red X icon.

- 2 Ensure that *User ID* displays *admin*, then press to move to the *Password* field

3 Type in a valid password and click on **OK**  to continue

OR


Click on **Close**  to cancel the log in and exit the application


On successful validation of the User ID and Password, the organiseit Data Import Wizard welcome screen is displayed.

1.2 WELCOME SCREEN

On successful login, the user will be presented with the following screen.



1. Click on the **Next**  to perform 7 easy sequential step to create/ schedule tasks to Import data into organiseit.

2. Click on **Close**  to cancel the further process and exit the application

CHAPTER 2: CONFIGURING A “PULL”


The following chapter looks at the steps to be performed in *organiseit Data Import Wizard*. This will cover:

- Destination database selection
- Task Selection - Creation, Modification
- Source database selection
- Target folder and template selection.
- Scheduling

2.1 STEP 1:- DESTINATION DETAILS

This screen provides the list of all the available *organiseit* Databases on your respective server (i.e., the Server on which *organiseit* database(s) is/are hosted).



1. Select the required destination Database from the list and click **Next**  to proceed to the next step.

2. Click on **Back**  to go to the previous step.

3. Click on **Close**  to cancel the process and exit the application.

2.2 STEP 2:- TASK DETAILS

After database selection step 2 activates the *Task Details* screen.

2.2.1 Description

organiseit can interface with more than one third-party database through the "Pull Process". Hence identification is required to identify each "Pull". Each "Pull" is called a task and a Name can be given to a task. So the "Pull" will thereafter be identified by its Name.

The screen below shows two task options:


New Task: choose this option to create a new task


Available Task: choose this option if you want to work on the existing task.




2.2.2 Actions

The actions you can perform in *Task Details* screen are described below.

Task Options	Description
<i>Task Name</i> field	Type in the new task name for <i>New Task</i> . Click on the drop arrow  and select <i>Task Name</i> from the list for the <i>Available Task</i> .
Add New	To create new task
Update	To make changes in the existing task. (For details refer Chapter 3)
Delete	To delete the existing task
Disable	To disable the selected task. i.e. to stop data importing at the scheduled time
Enable	To enable the disabled task
View	To view fields setting of the selected task. (You cannot change existing settings)
History	To view the task run history

1. Select the required option to perform the operation and click **Next**  to proceed to the next step.

2. Click on **Back**  to go to the previous step.

3. Click on **Close**  to cancel the process and exit the application.

2.3 STEP 3:- SOURCE DATABASE DETAILS

Step 3 activates the *Source Database Details* screen.

This screen provides the required fields to be filled up depending upon the *Source Type*.

The list provides 5 types of *Source Type*:

- **Access:** choose this option to import data from MS Access database (*.mdb format).
- **SQL Server/MSDE:** choose this option to import data from SQL Server/MSDE database (SQL 2000 and upwards).
- **MS Excel 97 - upward:** choose this option to import data from MS Excel file (*.xls format).
- **MS Excel 2007:** choose this option to import data from MS Excel file (*.xlsx format).
- **CSV File (*.csv):** choose this option to import data from CSV (Comma-Separated-Value) file (*.csv format).

The screen below shows the

organiseit Data Import Wizard
Version 3.0.3

Source Database Details

Source Type: SQL Server/MSDE
Server Name: sslibrd03
Authentication: Windows SQL Server
User Name:
Password:
Database Name: TP_ABC

You are in Step 3 of the wizard. Please Follow the steps below.
Select the Source Type of Database from the List provided.
Enter the Souce Database File Name, User Name and Password if any and click Next to proceed to the Next step.




Back Next Done Close

Organise IT - Data Import Wizard © 2003-04

2.3.1 BEHAVIOUR OF FIELDS

The table below shows the behavior of the *Fields* with the *Source Type*.

Source type Fields	Access	SQL Server/MSDE	MS Excel 97 - upward	MS Excel 2007	CSV File(*.csv)
Database File Name	Required	Not Required	Required	Required	Required
Server Name	Not Required	Required	Not Required	Not Required	Not Required
Database Name	Not Required	Required	Not Required	Not Required	Not Required
Authentication (windows/ sql server)	Not Required	Required	Not Required	Not Required	Not Required
User Name	Required (If the Access File is protected)	Required (If SQL Server authentication is selected)	Not Required	Not Required	Not Required
Password	Required (If the Access File is protected)	Required (If SQL Server authentication is selected and)	Not Required	Not Required	Not Required

1. Select the source type, fill the required fields and click **Next**  to proceed to the next step.
2. Click on **Back**  to go to the previous step.
3. Click on **Close**  to cancel the process and exit the application.

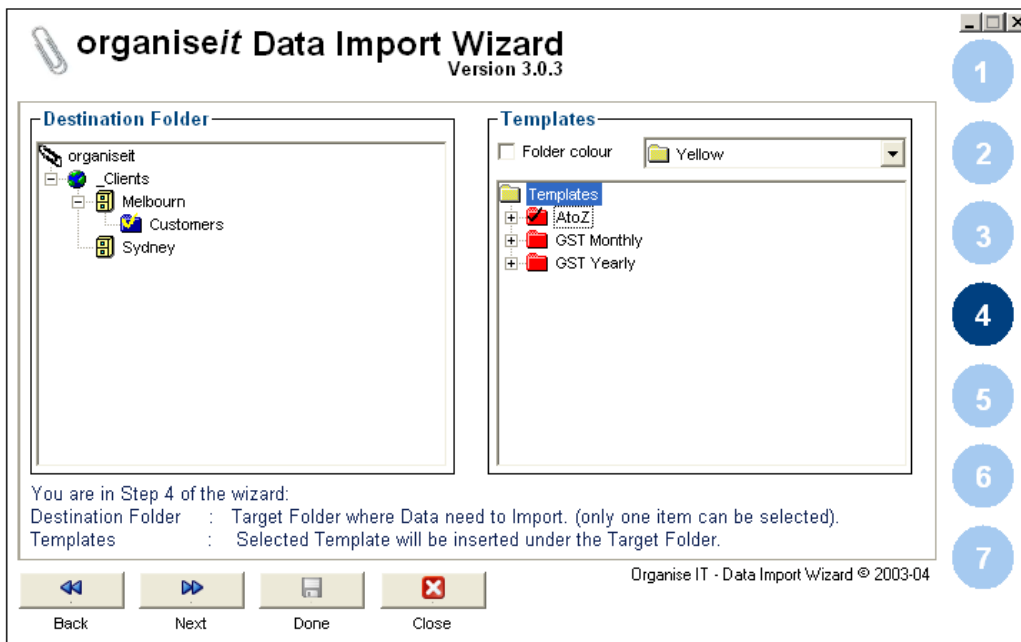
2.4 STEP 4: - DESTINATION FOLDER AND TEMPLATE

The screen below displays two panes

- **Destination Folder:** - Select the target folder from the *Destination Folder* pane where the data need to be import.


NOTE: Only one folder can be selected.

- **Templates:** - Select the Template to be used during creation of folders (for the imported data) under the target folder.
- **Folder Colour:** - Select this option only if there are additional folders to be created under the Imported Entity's folder. E.g., if you would like to create a folder for each Customer's Order under the Customer Folder then you can select the colour of the Order Folder from here.



1. After selecting target folder and template click **Next**  to proceed to the next step.

2. Click on **Back**  to go to the previous step.

3. Click on **Close**  to cancel the process and exit the application.

2.5 STEP5:- QUERIES USED FOR IMPORT

This step is applicable only when **Source Type** 'SQL Server/MSDE' or Access is selected in **step 3**.

The screen shown below displays two fields,

Folder Query: Type in the SQL query to fetch data from the Source Database that can be used to create folders in the Destination (organiseit) database.
This field is mandatory.

Keyword Query: Type in the SQL query to fetch data from the Source Database that can be used as keywords in the Destination (organiseit) database.
This field is optional.

NOTE:

1. The Query will be provided by Organise IT. Contact Organise IT to acquire the SQL Query for the Third-Party Application that you would like to interface with.

organiseit Data Import Wizard
Version 3.0.3

Queries used for Import

Folder Query

```
AS Attribute_Value, "A" AS Query_Flg From Client Union All SELECT Client.ClientID AS Source_Db_Id_Col, "RES_PHONE_1" AS Attribute_Type, Client.Telephone AS Attribute_Value, "A" AS Query_Flg FROM Client Union All SELECT Client.ClientID AS Source_Db_Id_Col, "FAX" AS Attribute_Type, Client.Fax AS Attribute_Value, "A" AS Query_Flg From Client
```

Keyword Query

```
SELECT distinct Client.ClientID AS Source_Db_Id_Col, "Policy Number" AS Attribute_Type, Risk.PolicyNumber AS Attribute_Value, "K" AS Query_Flg FROM Policy, Risk, Client WHERE (((Risk.PolicyID)=Policy.[PolicyID]) AND ((Policy.ClientID)=Client.[ClientID]))
```

You are in Step 5 of the wizard. Please Follow the steps below.

Folder Query : Query for fetching Folders from the Source database.
Keyword Query : Query for fetching Keywords.

**Please do not enter ORDER BY clause in the Query. click Next to proceed.

Organise IT - Data Import Wizard © 2003-04

Back Next Done Close

1. Type the queries required and click **Next**  to proceed to the next step.

2. Click on **Back**  to go to the previous step.


3. Click on **Close**  to cancel the process and exit the application.

2.6 STEP 6:- SCHEDULING

After providing source and destination database details, schedule the task.

Select the appropriate options for scheduling the task. The frequency of the importing of data will be dependent upon the options you choose from the screen shown below.

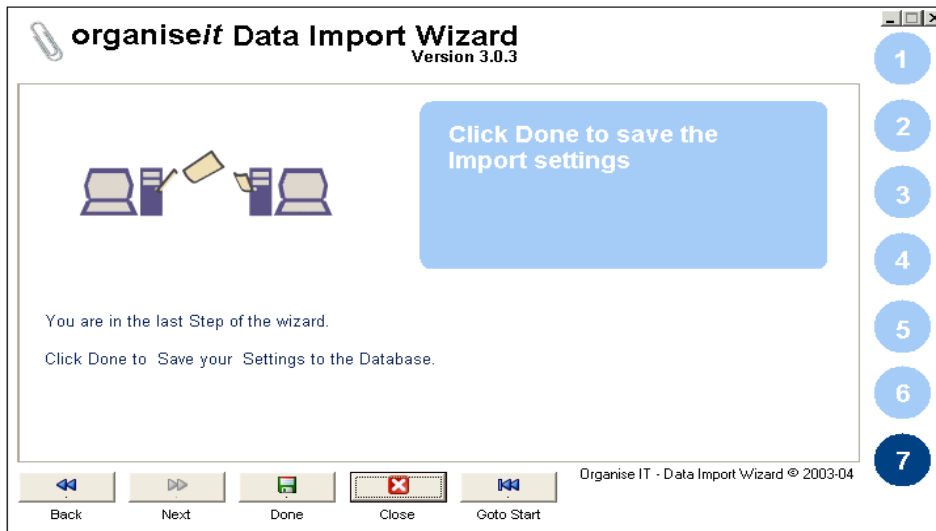
1. Select the options required and click **Next**  to proceed to the next step.





2. Click on **Back**  to go to the previous step.

3. Click on **Close**  to cancel the process and exit the application.

2.7 STEP 7:- SAVING THE SETTINGS

This is the last screen of the wizard. This will save the configuration details in the organiseit database and create a DTS Package (SQL 2000) / SSIS Package (SQL 2005) and schedule it, as per the details mentioned in previous section, to import data from the third-party database.



1. Click on **Done**  to save settings to the database.
2. Click on **Back**  to go to the previous step.
3. Click on **Goto Start**  to move to step 1.
4. Click on **Close**  to cancel the process and exit the application.

NOTE:

1. If the SQL Server is on Windows XP oitWebUser must be given "Full Control" permission on the Windows Folder. This is due to a known issue in SQL Server.
2. To verify that the task is created
 - a. SQL 2000
 - i. Open Enterprise Manager, goto Data Transformation Services. Microsoft SQL Servers → SQL Server Group → LOCAL → Data Transformation Services → Packages. Over here you will notice the Package created with the same name as that of the Task (specified in Step(2)).
 - ii. The Package is scheduled as per the schedule details given in Step(6) and can be found in Microsoft SQL Servers → SQL Server Group → LOCAL → SQL Server Agent → Jobs. The job will have the same name as that of the Package and the Task.

- b. SQL 2005
 - i. Open SQL Server Management Studio and connect to the Integration Services. You will find the SSIS package under Stored Packages → MSDB. The package will have the same name as that of the Task.
 - ii. The package is scheduled as per the schedule details given in Step(6) and can be found in SQL Server → SQL Server Agent → Jobs. The name of the Job will also be the same as that of the Task.

CHAPTER 3: UPDATING CONFIGURATION OF A “PULL”

User can update a task under certain circumstances like;

- Re-Building of the SQL Server
- Database (Source/Destination) is moved to another server, only database will be moved not task hence, you need to reselect existing task with new server name using import wizard update option.
- If any user changes *database file name* then he needs to update **Source Database Details** with new database file name.
- Modification of the existing queries (in case of MSDE/SQL Server or Access).
- If user wants to reschedule existing task.

Steps	Fields	Allowed
Source Database Details	(MSDE)	
	Source Type	No
	Server Name	Yes
	Authentication	Yes
	User Name/Password	Yes
	Database Name	Yes
	(Access)	
	Source Type	No
	Database File Name	Yes
	User Name/Password	No
	(CSV/MS Excel 97- upwards/ MS Excel 2007)	
	Source Type	No
Destination Folder/Templates	Database File Name	Yes
	Destination folder	Yes
	Templates	Yes
Queries Used For Import	Folder Colour	no
	Folder Query	Yes
	Keyword Query	Yes
Schedule	All options	Yes