

# IFW QUICK REFERENCE GUIDE:

## IMPORTING DIRECTORY INFORMATION

In order to eliminate manually entering data that is already in an electronic format, IFW lets you import directory information from an ASCII text file. The Directory Import Wizard accepts fixed length and delimited formats as well as OS Plus files. Finally, you can define a schedule for the import.

**Please note:** in order to move to the next screen in the process, a configuration file and a primary import file must be specified.

To access the Directory Import Wizard, follow these steps:

- 1) At the **IFW Control Center**, point to the **Administration** menu.
- 2) Select **Import Information**.
- 3) Click on **Directory**, and the Directory Import Wizard screen will appear.

### Directory Import Wizard, Main Screen

Here, provide IFW information about your directory file structure, select or save a configuration, specify a site, and set up an import schedule.

### SAVING IMPORT CONFIGURATION PARAMETERS

The Import Wizard can be run at any time to update your IFW Directory with additional or updated information. For this reason, you can save to a file all defined parameters in the **Configuration Name** text box.

- In the **Configuration Name** box, enter a name for the configuration you are about to set for an import.
- With subsequent imports, you can use the drop-down list box to access the list of saved configurations.

### IMPORTING FROM EXTERNAL DATA SOURCES

The IFW Directory Import Wizard is designed to import directory information from an ASCII file into the IFW Directory.

This utility does not overwrite existing records so it can be run any number of times. However, only a person with Administrator access can use this utility.

Before importing the Directory database, it needs to be exported from the application where it resides. Do this by backing up your user database to an ASCII file, in either a delimited or fixed length record format. Once you have created this file, copy it to a floppy, or move it to a directory location where IFW can read it.

### SPECIFYING A CONFIGURATION NAME AND SITE

At the top of this screen are two list boxes. One is used to select the name of the site to which you are importing directory information. If you have multiple sites, you must import to each site separately.

The other drop-down list box is used to save the import parameters to a configuration name.

### FILE SPECIFICATIONS AND SCHEDULING CHECK BOXES

#### Importing from OS Plus

By using the OS Plus Import utility, OS Plus users can transfer their DOS-based OS Plus directory information directly into the IFW directory.

Before importing OS Plus directory data, you need to export it from OS Plus. To do this, follow these steps:

- 1) From the OS Plus **System Menu**, select function **C) Database Utilities**.
- 2) From the OS Plus **Utilities Menu**, select function **A) Backup Organizational/User Database**.
- 3) When the backup finishes, OS Plus will have created an ORGBACK.DAT file typically located in the C:\OSPLUS\SITE00\BACKUP directory.
- 4) Copy this file to a directory where IFW can access it.
- 5) At the Directory Import Wizard screen, click the **Check Here For OS Plus Directory Import** check box.
- 6) In the **Primary Import File** text box, type the path and file name, or click the **Browse** button, and a directory dialog box will appear.
- 7) Select the ORGBACK.DAT file, and click the **OK** button.

**Please note:** before doing the above backup, verify the accuracy of the OS Plus data by running an Organizational Detail report.

#### Delete all Directory Information Before Starting Import?

Leave the default check mark in this box if you want the system to delete all current directory information from your IFW directory. Uncheck it if you want the system to incrementally update it.

#### Should Files Without Carriage Returns be Converted?

If you import a file that uses line feeds instead of carriage returns, insert a check in the **Files Without Carriage Returns Be Converted?** check box.

If you are not sure if the import file uses line feeds or carriage returns, the import software will detect which is used, and perform the following:

- 1) Automatically insert carriage returns into the imported file.
- 2) Insert a check in the **Should Files Without Carriage Returns Be Converted?** check box.

If you import a file that already has carriage returns, again, the software will detect this, but will not put in extra carriage returns.

**Please note:** UNIX is a system known **not** to use carriage returns.

#### Scheduling an Import

After clicking the **Run This Import On A Regular Schedule?** check box, the **Define Schedule** button will become active. Click it, and a Choose Schedule dialog box will appear.

This dialog box lets you schedule your import by month, week, or day, and to set the time of the import. Depending upon which selection you make, different options will be available.

#### Scheduling by Month

If you click the **Monthly** option button, you have two choices:

- By clicking the **Date** option button, you can type in a specific date for the month that data will be imported, or
- If you select the **Of The Month** option button, choose the First, Second, Third, Fourth, or Last day of the week of the month in the first drop-down list box; in the second drop-down list box, select a day of the week.

#### Scheduling by Week

If you wish to import regularly every week, follow these steps:

- 1) Click the **Weekly** option button.
- 2) A drop-down list box will appear, and select the day of the week.

#### Scheduling by Day

If you wish to import data on a specific day or days, follow these steps:

- 1) Click the **Daily** option button.
- 2) A row of check boxes will appear for each day of the week.
- 3) Click the desired day or days for data to be imported.

After you have set the month, week, or day, the next step is to enter the time of day that you want the import to run.

#### Setting the Time of Import

To designate what time you want your data imported, simply type in the desired time in the **Time of Import** text box. If you are not using military time, be sure to specify **AM** or **PM**.

### PRIMARY IMPORT FILE TEXT BOX

In the **Primary Import File** text box, enter the complete path for your primary import file, or by clicking the **Browse** button, select a path.

Your primary file may hold organizational level names and their associated codes, along with first and last names of extension holders, numbers, and other information. If your primary file contains all your directory information, and you don't have organizational levels in separate files, click Next to access the Configure Primary Input File screen. Here, define the layout of the file you want to import, and tell the Import Wizard where to put it in IFW.

If you keep organizational levels and codes in separate files, the system matches the code in the secondary file to the code in the primary file.

When the organizational level names and codes are in separate files, click the appropriate check box to reveal a text box that lets you enter the path for that file, or click Browse to search for the path and file names.

After making entries at this screen, click **Next** to access the Configure Primary Input File screen. Here, define the layout of the file you want to import, and tell the Import Wizard where to put it in IFW.

### Configuring the Primary Input File

At the Configure Primary Input File screen, define the layout of the file you want to import, and tell the Import Wizard where to put it in IFW.

The left side of the Configure Primary Input File screen contains controls that help you define the layout of the import data file, and the right side provides a preview of the file as you are defining its parameters.

## TO CONFIGURE AN IMPORT FILE

There are three basic steps to configuring a primary import file:

### Specifying the format of the import file

The two file formats that are imported are fixed length and delimited. In a fixed-length file, each field is set at a predetermined size. In a delimited file, the fields vary in size, and are separated by a special character.

### Designating which field goes into which column heading

After determining the format of the data and separating it into fields, assign the fields to the appropriate columns. To do this, select a field, and click the column-heading name in the **Export To What Data Column** list box.

### Data Filtering

The area at the left of the Configure Primary Input File screen contains data filtering controls for setting filters on any, all, or no fields in both fixed-length and delimited file formats. As you assign fields to column names, you can exclude unwanted data with the use of filters. Data filtering has four controls:

- Minimum Length
- Filter Value
- Numeric Values Only?
- Column Must be Blank

#### Minimum Length

Minimum Length is the least amount of characters a field must contain. By typing a value in the **Minimum Length** text box, the system will import all records that contain more characters than that specified value, and exclude records with fewer characters specified.

#### Filter Value

Filter Value excludes records that have fields that do not meet a criterion. By typing a character or string of characters in the **Filter Value** text box, IFW will exclude all fields that do not match what you typed in the text box, and include whatever matches. Filters are cumulative; the second filter only applies to those records that passed the first filter. **Please note:** Filter Value is case sensitive.

#### Numeric Values

To include only the fields that contain numeric values, click the **Numeric Values Only?** check box.

#### Column Must Be Blank

Click this check box to exclude records that have data in this field.

Once you have defined criteria for each column in the file you are importing, the **Next** button at the bottom of the screen becomes active. When clicked, the Default Hierarchy Names screen appears. The Default Hierarchy Names screen is the third and final screen in this process.

## Importing a Delimited File

### SPECIFYING THE FORMAT

When importing a primary file, the default setting is delimited. Delimited files use a special character (a separator) to separate each field. The

default separator is a comma. After typing in the separator, the raw data will separate into individual fields.

Delimited files sometimes use another special character (a delimiter) to surround a string of letters (not numbers). The default delimiter is a double quote and should be stripped from the data.

### ASSIGNING FIELDS TO COLUMN HEADINGS

To assign fields to column names in a delimited file, follow these steps:

- 1) Click the **Delimited** option button, and specify the separator and delimiter.
- 2) In the Raw Data Preview section, click a field.
- 3) Click a heading name in the **Export To What Data Column?** list box.
- 4) The field you selected above is assigned to the column-heading name you clicked in the **Export To What Data Column?** scrolling list box.
- 5) If an input field is not to be exported, highlight that field and assign it the heading name of None in the **Export To What Data Column?** list box.
- 6) Increment the number in the **Col. No.** text box, and repeat these steps for all desired fields.

After the fields have been assigned column names, click **Preview**, and the Data Parse Preview screen will appear. If the data are not formatted correctly, click **Close** to return to the Configure Import File screen.

### DATA FILTERING

As you assign fields to column names, you can exclude unwanted data with the use of filters.

Once you have defined criteria for each column in the file you are importing, the **Next** button at the bottom of the screen becomes active. When clicked, the Default Hierarchy Names screen appears. The Default Hierarchy Names screen is the third and final screen in this process.

## Importing a Fixed-Length File

### SPECIFYING THE FORMAT

In a fixed-length file, data are stored without the use of a separator or delimiter, and each field is the same length. Also, you must specify how many characters wide a field is by dragging your mouse across the field.

### ASSIGNING FIELDS TO COLUMN HEADINGS

To assign column names to fields in a fixed length file, follow these steps:

- 1) Determine where the field begins and ends.
- 2) Drag your mouse from the beginning of the field to its end.
- 3) Click a heading name in the **Export To What Data Column?** list box.
- 4) If an input field is not to be exported, highlight that field and assign it the heading name of None in the **Export To What Data Column?** list box.
- 5) Select a number displayed in the **Col. No.** text box, and repeat steps 1 through 3 for each field.

After the fields have been assigned column names, click **Preview**, and the Data Parse Preview screen will appear. If the data are not formatted correctly, click **Close** to return to the Configure Import File screen.

### DATA FILTERING

As you assign fields to column names, you can exclude unwanted data with the use of filters.

Once you have defined criteria for each column in the file you are importing, the **Next** button at the bottom of the screen becomes active. When clicked, the Default Hierarchy Names screen appears.

## Default Hierarchy Names

This screen tells the Import Wizard exactly where to put the data you are importing if the record does not have that directory level. Use the drop-down list boxes to select a name you are using in IFW, or type a new name.

If you do not use all of the IFW Directory levels, and have unassigned or placeholder names, you can tell the Import Wizard to put placeholder information into an Import (default) placeholder level.

When you finish making selections, click **Save and Import** to save the import configuration and immediately begin the import.

To run the import later, click **Save and Exit** to save the import configuration and exit the Directory Import utility. When you do perform the import, select the saved **Configuration Name** at the Directory Import Wizard, Main screen.

## Troubleshooting the Import

When the import finishes, an Import Status screen appears.

Certain entries might appear which could require further investigation. A few examples along with their troubleshooting actions follow:

Message	Actions
Nothing added; Nothing updated	Check the file names and format at the Main Import Wizard screen. Make sure that the field you defined at the Configure Import screen is exporting to the correct field in your IFW database.
File Empty	Check the Data Filtering. Perhaps the filter was too specific, and nothing remained to import.
Number of (level) updated=0	This may not be an error at all if your file had no new data for this level.

To print this information, click the **Print Screen** button. When you finish verifying this import information, click **Close**. When you do this, you exit the Import Wizard. To start a new import, click the **Start New Import** button.