

GuardTool
Importer
Addendum

1. Importing text files (*.txt, .csv) and Excel files (.xls) with the Jet Engine

Restrictions on file names

- Use only letters, digits and underscores.

Data and import restrictions

- Field or column names should only contain letters, digits and underscores.
- The field(s) used as your source primary key must be unique and not null.
- No data should be imported in the field **PERSON_ID** of the destination database.

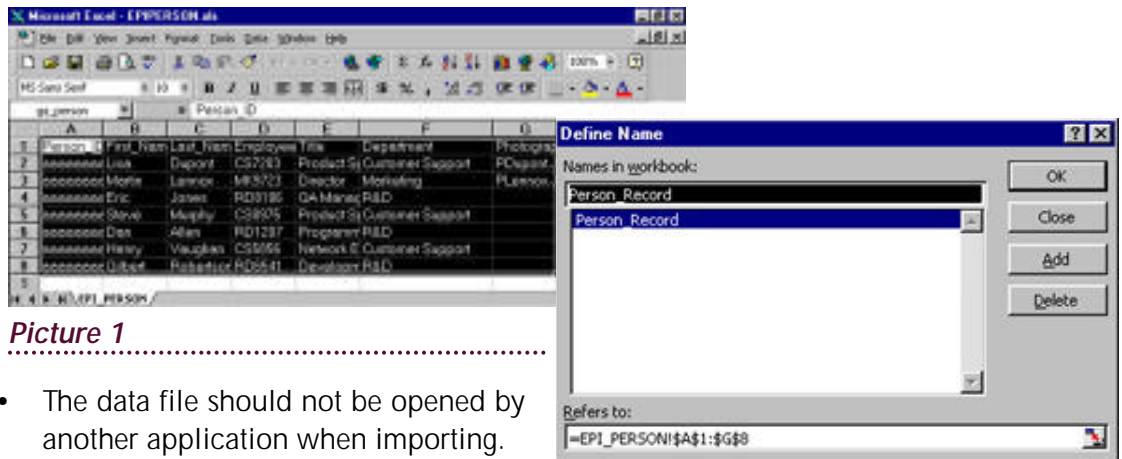
To define a name, follow these steps:

1. Open your data file in Excel.

Your data will be displayed in the spreadsheet.

2. Using the mouse, click on the first cell of the first row containing your data (or column names). Go to the last row of data and , while holding down the SHIFT key, click on the last data cell.

Your data will be highlighted.



Picture 1

- The data file should not be opened by another application when importing.

Data preparation for Excel spreadsheet

When selecting the person source of data, the importer puts a "\$" character in the data sheet name which causes a syntax error in FROM clause at import time. To avoid this problem, define a name for the range of cells containing your data (and column names) and select this name as the source of the person information in the Importer.

3. Choose Insert > Name > Define from the menu.

The Define Name window will open, displaying the selected range referred to (see picture 1 above).

4. Type in a name identifying your data.
5. Click **OK** and save your data file.

2. Importing using a SCHEMA.INI file (importing from a text file)

You should always use a **schema.ini** file with the jet engine when:

- Your data file does not have column headers.
- Your data file is not comma delimited.
- Your data contains characters not supported by the OEM character set (code page 437).
- Your data contains codes that are numeric only (e.g. card code, employee number, etc).

To create a **schema.ini**, type the following example in Notepad then save it in the same folder as your data file.

```
[EPI_Person.csv]
ColNameHeader=True
Format=CSVDelimited
MaxScanRows=25
CharacterSet=ANSI
Col1=Employee_number Char Width 255
Col2=First_Name Char Width 255
Col3=Last_Name Char Width 255
Col4=Address Char Width 255
Col5=City Char Width 255
Col6=Department Char Width 255
Col7=Photograph_File_Name Char Width 255
```

Here is a brief description of each line:

- **[EPI_Person.csv]** is the name of your data file,
- **ColNameHeader=True** indicates if the first line in the file is a header line,
- **Format=CSVDelimited** indicates the format of the file (CSV, Tab or Custom delimited),
- **MaxScanRows=25** indicates the number of person records scanned to guess at the field types,
- **CharacterSet=ANSI** indicates character type (accented characters included in ANSI vs. OEM),
- **Col1=Employee_number Char Width 255** indicates the column number, the field name, the field type and the length of the field.

Note: If you wish to import a file that has a column name header and you plan to use a **schema.ini** file to overwrite the header information, then you must set **ColNameHeader=True**, otherwise, the header line will be imported as a record.

3. Installing and using 32-bit ODBC drivers

Use the ODBC Data Source Administrator to define the Data Source Name that will be used by your ODBC data. If the desired driver is not installed, you may run the MDAC setup, available from your EPISUITE CD in the folder **\Extras\MDAC2.5**, which will install the following 32-bit drivers:

Microsoft Access
 Microsoft Dbase
 Microsoft ODBC for Oracle
 Microsoft Excel
 Microsoft FoxPro
 Microsoft Paradox
 Microsoft Text
 SQLServer

Configuring the data

The Microsoft ODBC Text driver also uses the **Schema.ini** file. This file is automatically created when a Text data source is configured. To configure a Text data source, using the Microsoft ODBC Text driver, follow these steps:

1. Open the ODBC Data Source Administrator by clicking on **Data Source** in the Importer or opening the applet Data Sources (ODBC) from the Control Panel.

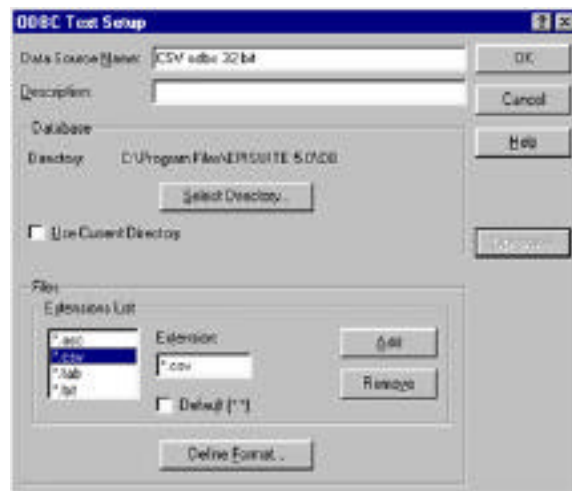
The main window of the ODBC Data Source Administrator is displayed.

2. Click **Add** and select the Microsoft Text driver from the list. Click **OK**.

The ODBC Text Setup window is displayed.

3. Type in your Data Source Name.
4. Click **Select Directory** and browse to the folder where your data file(s) reside.
5. Click **Options**.

The entire ODBC Text Setup window is displayed.



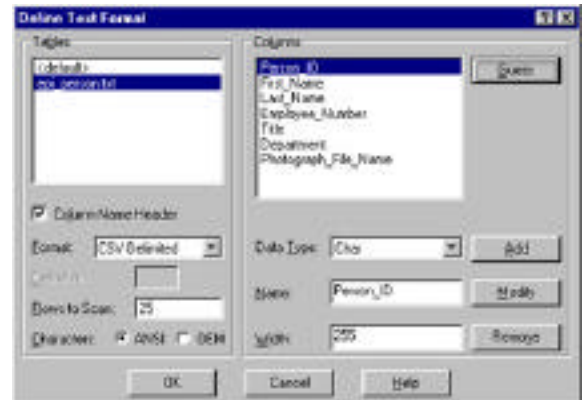
6. Remove all the file extensions not used by your data files.

6.1 Select the extension you wish to remove.

6.2 Click **Remove**.

7. Click **Define Format**.

The following window will be displayed:



8. Click on your data file name
9. Click the check box for Column Name Header if the first row of your data contains field names. Remove the check mark otherwise.
10. If your data file is comma separated, leave the selected default CSV delimited. Otherwise, select the appropriate descriptor from the drop down list.
11. Specify the delimiter used by your data file if you specified Custom delimited in step 10.
12. You may leave the default 25 as the number of rows to scan.
13. Select ANSI as the character types if your data contains accented characters.

14. Click **Guess**.

The program will scan the first 25 rows of your data file and attempt to guess at the field types. The results of this guess is displayed in the Column section.

15. For each of the displayed fields

15.1 Click on the field name

15.2 If the name is not meaningful (e.g. F1, F2, etc.), type in an appropriate name

15.3 If the field type is numeric (Integer, Float, Short, Single) and your field doesn't represent a real quantity, change the field type to Char and set the field width to 255. If you selected Fixed Length as the format, the width must be the exact width of the data in the file.

15.4 Click **Modify** to save the changes.

16. Click **OK**.

The **schema.ini** file is then created in your data folder.

4. Updating an existing database without duplicating existing records

- As your source primary key, select a field or set of fields that unique, non null and already present in the destination database. For instance, if a field containing the employee number is selected as the source primary key, the destination database records must contain this employee number.
- When you associate the fields (field mapping) from the source database to the destination database, map this primary key.

5. Troubleshooting the Importer

If you receive an error message when trying to import, try a simple import first. For instance, import only person records, using character fields only, in an empty database. If the import is successful, gradually increase its complexity to isolate the components that makes the import fail.

Some guidelines:

Any syntax errors:

- Ensure the file and column names only contain letters, numbers and underscores.

- Ensure the file and column names are not using reserved words (do not use DATE, GROUP, and LEVEL)

Any abnormal endings of the Importer:

- Ensure that the source data is not imported in a field that is too small.
- Ensure that something is imported in every required field of the destination database (the corresponding source field cannot be empty).