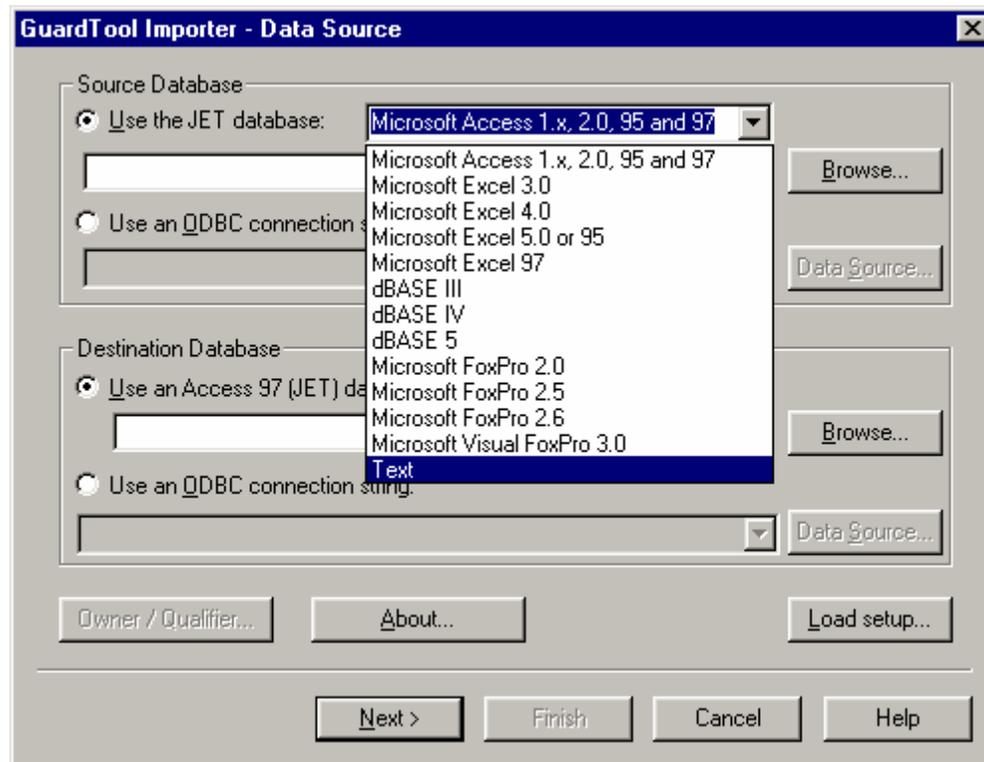


## EPI Suite 6.x

# GUARDTOOL IMPORTER ADDENDUM

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

If the files that you want to import are in the list of the Jet Engine drivers (see dialog box 1) you should use the Jet Engine instead of ODBC. If the Jet Engine drivers don't support your file, you should go to section 3 of this file for information on the ODBC drivers.



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## Restrictions on names

When importing from a text file, you should make sure that the file name only includes numbers and letters without any reserved symbols like spaces, slash, dash, etc...

## Data and import restrictions

You should always open the file in WordPad to look at the header and make sure it does not contain any spaces, dots (".") or pound sign ("#"). Also make sure that there are no empty fields or duplicate fields for the primary key being used. Furthermore, the Person\_id should not be used for mapping the primary key or as the primary key. Close the data file before importing it.

## Data preparation for Excel spreadsheet

If you want to import from an Excel spreadsheet, you have to define a name in Excel. This has to be done so that you can select a name in the GuardTool Importer in the Person Table Setup window that doesn't have a "\$" in the name.

To define a name you must:

- Open the file in Excel,
- from the Insert drop down menu you select Name->Define,
- this will open the Define Name window where you have to type in a name.
- To finish, you only have to click on OK and save the file.

If you don't define a name in Excel and select the name with a "\$" in it, you will receive an error message saying "failed to execute the database query, database error syntax error in FROM clause error 3131" and won't be able to import.

Instead of using an Excel file (\*.xls), we suggest saving your spreadsheet as a CSV format from Excel. This way you won't have to do all the steps above since you will be using a CSV and you don't have to Define a Name for a text file (\*.txt, \*.csv).

## 2. Importing using a SCHEMA.INI file

You should always use a schema.ini for importing with the jet engine when:

1. you have no column headers,
2. your file isn't comma delimited (CSV),
3. you have accented characters in your data (use ANSI instead of OEM),
4. numeric information in the data should be processed as characters.

To create a schema.ini, type the following example in Notepad then save it in the same folder as where the raw data resides (\*.txt, \*.csv).

Here is an example of a schema.ini:

```
[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]** indicates the name of the 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
- **CharacterSet=ANSI** indicates character type (accented characters included in ANSI vs. OEM).
- **Col1=Employee\_number CharWidth 255** indicates the column number, the field name, the type and the length of the field.



**NOTE:** If you want to import a file that has a header and you want to use a schema.ini file to overwrite that header, then you will have to make sure that you set COLNAMEHEADER=TRUE because if it's false, the header line will be imported as a record.

### 3. ODBC drivers

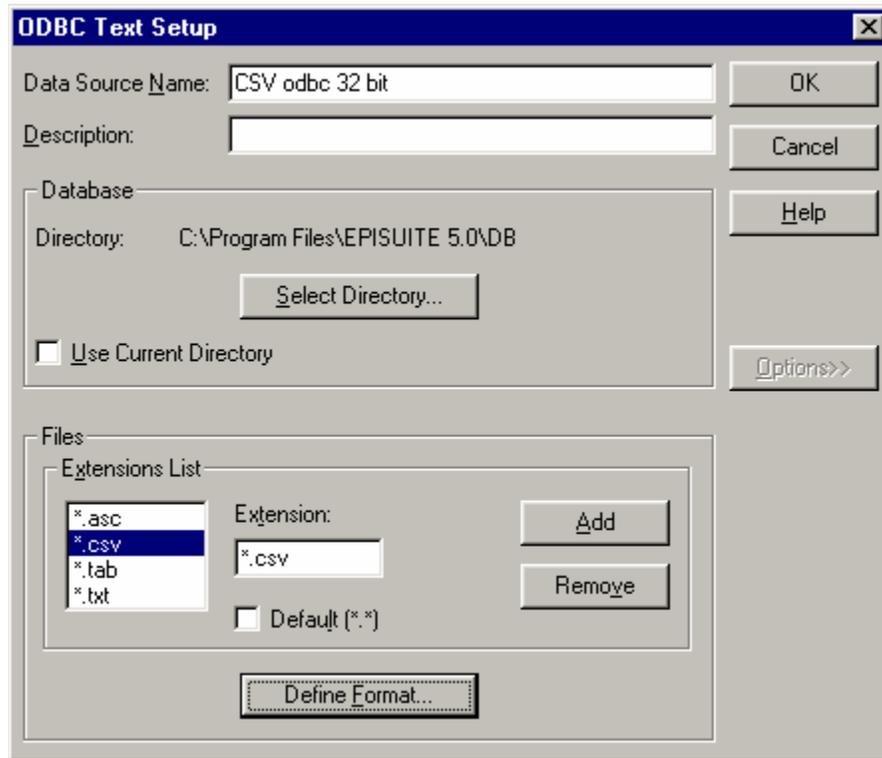
When starting the "ODBC data source administrator", if the list under the "drivers tab" is empty, you need to install the ODBC drivers. They are located on our CD under \Extras\ODBC3.51\. The drivers available are the 32 bit Microsoft Access, dBase, Excel, FoxPro, Text and the SQL Server.

#### Configuring the data

When you import from a text file, it's a good practice to use the DEFINE FORMAT function from the ODBC Data Source program. To do so, you have to open the ODBC Data Source program from the control panel or from one of the **Data Source** buttons within the GuardTool Importer. Once the ODBC Data Source is open, you either **Add** a new data source or doubleclick

on the existing one to “configure”. This will open another window called ODBC Text Setup (see dialog box 2). Once in this window:

- give a name in **Data Source Name**,
- click on **Select Directory** and browse to the directory where your data file resides
- then click on **Options** to open another section of this window
- click on your file extension from the “Extensions List” or add one if yours is not in the list
- click on **Define Format** and this will open the Define Format window.



From the Define Text Format window (see dialog box 3) you must select your file from the list under Tables. Below the Tables section there are a couple of settings that can be customized:

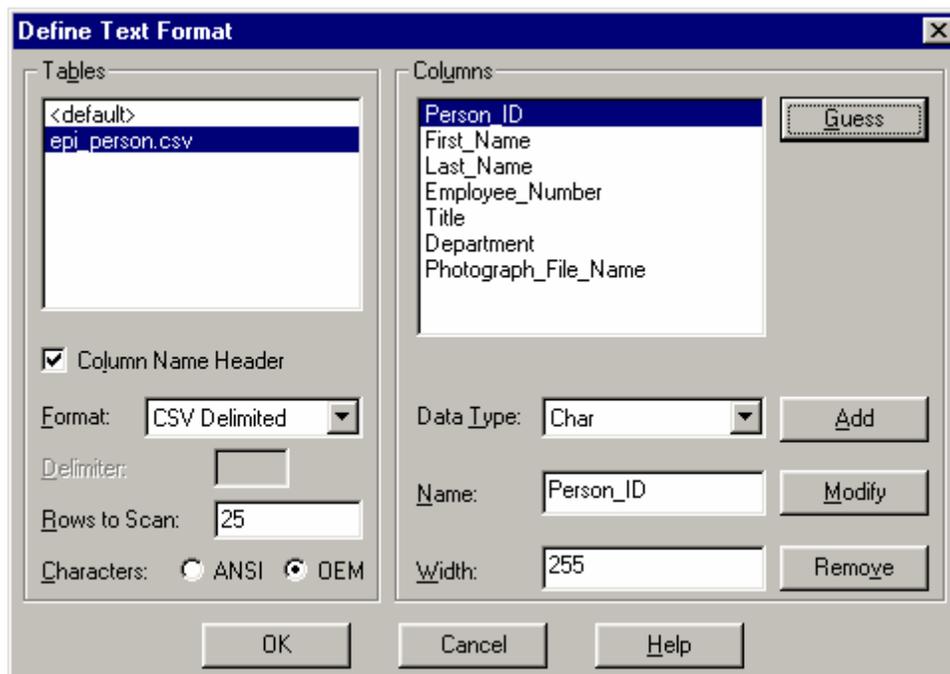
- You can define the format of the file, it's normally comma delimited (\*.txt, \*.csv). If it's delimited by something else other than comma, you should indicate the type of delimiter by selecting the Custom Delimited option and typing in the characters used in the Delimiter box.
- You can change the number of rows that will be scanned. It defaults to 25 but can be any number between 1 and 32767. To be safe, put a number higher than the maximum number of lines (number of person) to be scanned in the file.

- You can specify your character type as ANSI or OEM. ANSI supports the accented characters that are not supported in OEM, which is selected by default. So if you are not sure if you have accented characters in your data, you should select ANSI as the character set.

If the text file contains a header line, you should put a checkmark in the “Column Name Header” and click on the Guess button to define the headers. When doing so, you will see your field name appear under “Columns”. If the Column Name Header is not checked, and you press the Guess button, the field name will be F1 to Fn where n is the last column (field).

Once the Guess has been done you can change the settings for each field in regards to Data Type, Name and Width of the fields. Here is a brief description of the different settings that can be customized:

- The **Data Type** indicates the type of characters for the selected field. They are usually “Char” for text fields, “Date” for date fields and “Integer” for number fields.
- The **Name** indicates the selected column's name. It can be used to specify a new column name for either an existing column or a new column.
- The **Width** indicates the number of characters the fields will be able to store in the database.
- The value can be changed between 1 and 255. For CSV or delimited files, use a value of 255.
- There are also 3 other buttons (**Add**, **Modify** and **Remove**) which are used to add, modify and remove a field from the list under Columns.



#### 4. How to update an existing database without duplicating

1. Select the same primary key as the primary key used in the current database.
2. When you associate the fields (field mapping) from the source database to the destination database, be sure to include (map) the primary key field previously chosen at the step before.
3. Now, when you start to import, the importer will detect that the record already exists and will update the person record instead of adding new records.

#### 5. Troubleshooting the Importer

If you receive an error message when trying to import, you should first try a really simple import. Import the first and last name, then add the pictures, then, add the cards and so on.

If you get an error message saying "Failed to execute the database query, database error syntax error in FROM clause error 3131", two causes are possible:

1. the content of the information file has something wrong with it
2. something is wrong with the file name.