

DATA IMPORT UTILITY INSTRUCTION SHEET

This document will outline the steps necessary to import demographic data in to the BSDI V10 Suite of programs. The import utility allows you to match up fields in your data import file with fields in the BSDI database. The data import file must be in either a comma separated values (CSV), or a delimitated text file (TXT) format.

If you routinely import data from another system, you will be able to automate the data import. The utility will create a Windows batch file that will encode all of your import settings. In future you will then just run this batch file to automate your data imports.

Please Note that if you wish to update existing records in the BSDI database then you must check the "Update Existing Records" checkbox. Otherwise the system will import the participants a second time and allocate the duplicate records a system generated ID.

Procedure

This document will assume that you will be carrying out the data conversion using the Version 10 Fitness Analyst. The steps will be the same if you were completing the conversion using Retention Manager, or Check-in. In the instructions below substitute in the program you are using in place of the Fitness Analyst.

1. Click on "Participants" from the submenu.

📶 Fitness Analyst Assessn	nent & Training System	_ 🗆 🔀
Participants Staff Configure	Group/Class Tools Query Wizard Help	
New Participant Select Participant	👫 Search 🛛 🏠 New Participant	🛒 Exit
Delete Participant	Participant Demographics and Groups	
Previous Participant (F2) Next Participant (F3)	🚔 Change 📑 Delete 🚔 Reports & Queries 🔻 📳	?
Review Bulk EMail History	Name: John S Sample Password	
Data Import	ID: 1176 Scancard: 22002	
Exit	Status: Apparently Healthy	
	EMail: Johnsample@bsdi.cc Phone:	
Exercise Habits & Interest	S DOB: 7/7/1982 Gender: Male	
🖓 Fitness Assessment	Fitness Analyst Assessment & Training System tidpants tidpants Staff Configure Group/Class Select Participant Select Participant Delete Participant Previous Participant (F2) New Participant (F3) Review Bulk EMail History Data Import Exercise Habits & Interests Privess Assessment Image: Privess Assessment	

2. Select "Data Import" from the dropdown menu.

BSDI Data Import	×
Please select a file to import:	
Field Delimiter:	· <u> </u>
Next	📮 Exit

3. Click on the icon.

Open		? 🔀
Look in:	🖙 Local Disk (C:)	
My Recent Documents	CompChecker Config.Msi Corel Documents and Settings Config.Msi The settings Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.Msi Config.M	
My Computer	HelpI Inetpub MSOCache MyFiles Program Files TEMP WINDOWS ImportFile.csv	
My Network Places	File name: Import File.csv Files of type: CSV Files	<u>O</u> pen Cancel

4. Select the file name you wish to import (In this example "ImportFile.csv"), click "Open".

BSDI Data Import	×
Please select a file to import:	
C:\ImportFile.csv	
Field Delimiter:	
Next	🛱 Exit

5. If your import file uses an alternative character to "," as a field delimiter then enter that value here:

6. The "Field Mappings" window enables you to match up fields in your import file (SourceFiled), with fields in the BSDI database (ChosenField). This can be done by clicking on the chosen field name, next to the source field name you wish to match, and selecting the field name from the drop down window.

SourceField	ChosenField
ID	SSNo
Scancard	FirstName
FirstName	LastName
MI	MidInitial
LastName	LastName
Unit/Div	MemberType 🔽
LocalStreet	MidInitial
Gender	Organization
BirthDate	Unit/Division
MemStart	Department
MemEnd	Group
Local phone	JobTitle Address1
	Address2
	City
	State
First Line Holds Field Name Update existing record if ir Exit on Completion	es (don't import) nport record ID matches existing ID. Otherwise a new folder is added with a new ID

7. If the first line of your import file contains field names (as in the example above), then check:

First Line Holds Field Names (don't import)

8. If you want the import to update existing records, in addition to adding new records, check:

\checkmark	Update existing record if import record ID matches existing ID.
_	Otherwise a new folder is added with a new ID.

9. When you have completed matching up the data fields, click on "Import Now".

BSDI Data Import	×
Results	
Database Login: Server-apollog Login=85D DBName= Template for data import mapping fields found. Stored record for: Steven Booth Import Processing DONE! 1 records were imported. 0 record importe failed	BSDI
ack 😓	📮 Exit

- 10. When the import has completed an informational summary is displayed in the "Results" pane.
- 11. Click on "Exit" to close the utility.

Procedure for the Automation of the Data Import

Please note that the file that you are going to set up to be automatically imported in to Fitness Analyst must not contain any spaces in the file name.

For example; "C:\DataImport.txt" is acceptable, whereas "C:\Data Import.exe" is not.

- 1. If you wish to have the automated import close automatically ensure that you check "Exit on completion" checkbox.
- 2. If you wish to delete the import file after it has been imported, then check "Delete Import File on Completion" checkbox.
- 3. Click on the "Automation" button.



4. An informational dialog window will open. Please take the time to read its contents.

I	Informat	tion
	(į)	This will create a Windows batch file (C: \Program Files\BSDI\Import.bat) that will encode all of your current settings (login, file name, first line, auto-exit, import file delete). This batch file will let *anyone* with access to this directory automatically import the selected file at any time. You can use this batch file to automate your imports (e.g. from a scheduled job) after filling the import file with data. Create the batch file now?
		<u>Yes</u> <u>N</u> o

- 5. Click "Yes" to continue & to create the batch file.
- 6. To run/execute this file you will need to open the "Windows Explorer".
- 7. Right click on the "My Computer" icon on your desktop, or by clicking on the "Start" button.
- 8. Select "Explore" from the dropdown menu.
- 9. Navigate to "C:\Program Files\BSDI"



- 10. Double click on the "Import.bat" file to execute/run the import. This will run the Data Import Utility automatically.
- 11. To fully automate the process you can use the "Windows Scheduler" (See the instructions list below).

Scheduling the Import file to run automatically with the Windows Scheduler.

- 1. Click on the Windows "Start" button.
- 2. Select "Programs", or "All Programs"
- 3. Select "Accessories" from the displayed list.
- 4. Select "System Tools" from the displayed list.
- 5. Select "Scheduled Tasks" from the displayed list.

🖆 Scheduled Tasks						
<u>Eile E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ool	ls Adva <u>n</u> ced <u>H</u> elp					
G Back * Search P Folders III •						
Address 🙆 Scheduled Tasks					💌 🄁 Go	
	Name 🔺	Schedule	Next Run Time	Last Run Time	Status	
Other Places 🙁	Add Scheduled Task	At 4:50 PM every d	4:50:00 PM	4:50:00 PM	The scheduled task	
Control Panel						
My Documents						
Details 🛞						
	<				>	
2 objects						

- 6. Click on the "Add Scheduled Task Icon"
- 7. The Scheduled Task Wizard will open.
- 8. Click on "Next"



9. Click the "Browse" button, and navigate to C:\Program Files\BSDI.

Select Program	n to Schedule				? 🔀
Look in:	🚞 BSDI		💌 🧿 🕸	P 🖪	 -
My Recent Documents Desktop My Documents My Computer	Database Documents Rave SQL SQLDBLib SysQueries Tutorials UserQueries Analyst.ico Assess.exe borIndmm.dll BSDI License.rt BSDI.ini BSDIDataTempl Checkin.exe	f ate.dat	CheckIn.pdf CI.chm CI.ico CI.ico Clear.jpg Click.wav ConfigureDB.exe Convert2V10.exe Convert2V10.exe Convert.zip Convert.zip Convert.zip Convert.zip Data Import Status 0512 Data Import Status 0512 Data Import Status 0512 Data Import Status 0512 FitnessAnalyst.pdf FitnessAnalyst.pdf	207. txt 208. txt	keycode.dll KIConvert.exe ONoEntry.WAV OBInstanceFind Rave.ini RavePack.dll RMgr.chm RMgr.exe RMgr.ico RMgr.jog RMgr.jof RMgr.jof WaldEntry.wav WS_FTP.LOG
S	File <u>n</u> ame:	Import.bat		*	<u>Open</u>
My Network	Files of type:	Programs		*	Cancel

10. Select "Import.bat" file, then click "Open"

Scheduled Task Wizar	d	×
2	Type a name for this task. The task name can be the same name as the program name. Import Perform this task: ○ Daily • Weekly • Monthly ○ One time only • When my computer starts • When I log on	
	< <u>B</u> ack <u>N</u> ext > Cancel	

- 11. In this window you can select how often you would like to take a backup. The frequency will depend on the amount of data you will be importing.
- 12. Select the start time, frequency, and the days you require a backup to be taken.

Scheduled Task Wizar	ď	×
2	Select the time and day you want this task to start. Start time: Start time: Start time: Start time: Start time: Select the day(s) of the week below: Monday Thursday Tuesday Friday Wednesday Saturday Sunday	
	< <u>B</u> ack <u>N</u> ext > Cancel	

- 13. Click "Next".
- 14. Enter the username & password for running the task. (Note, if you do not enter the password, the task might not run).
- 15. Click "Next".

Scheduled Task Wizard	
	You have successfully scheduled the following task: Import
	Windows will perform this task: At 1:13 PM every Thu, Fri of every week, starting 12/8/2005
	Open advanced properties for this task when I click Finish. Click Finish to add this task to your Windows schedule.
	< <u>B</u> ack Finish Cancel

16. Click Finish.