

Basics Series-4004

Database Manager and Import

Version 9.0

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Contents

Workbook	1
Database Manager	1
Specification Tab	1
Query Tab	1
Replacement Values Tab	1
Run the Database Manager	2
Import	3
Connecting to the Import File	5
Analyzing the Import File	5
Run the Import	6
Lesson 1 Database Manager	9
Tutorial 1.1 – Setting Fixed Values	10
Tutorial 1.2 – Copying Field Values	14
Lesson 2 Import	17
Tutorial 2.1 – Set Up Import	18
Tutorial 2.2 – Perform Import	20

Notes

Workbook

Database Manager

The Database Manager is used to update selected records in a database with fixed values. The best way to understand the purpose of the Database Manager is by giving an example. A common scenario is one created by the U. S. Postal Service when the zip code in an area changes. The Database Manager can be used to select those records with the current zip code and update them to the new zip code all at once.

The Database Manager does not span companies by default. If you do want to span companies, you will need to list the companies you want to span on the Spanning tab of the Document Properties screen for that Database Manager specification.

Note: The Database Manager process should be used with caution. There is no undo feature, so a backup is recommended before making updates with the Database Manager. You will need a password from your Support Representative to run this process.

Database Manager specifications are managed with the Explorer, which is identical to the Explorer used for documents.

The Database Manager screen is displayed when you create a new or open an existing Database Manager specification from the Explorer. This screen uses three tabs to name the database manager specification, define the query to be used, and specify what the replacement values should be.

Specification Tab

The Specification tab is used to name the specification and assign it to a category.

Query Tab

The Query tab is used to define the query to select the specific records to be updated and uses the standard query grid.

Replacement Values Tab

The Replacement Values tab is used to define the fields to be updated, applicable row modifiers, and the new value. The fields are listed and defined below.

Field Name

The field name identifying the field to be updated. This field is supported by the Select Field popup.

Row Mod

The row modifier for the field. If the field you are attempting to change is a grid style field, the row modifier field allows you to identify which line on the grid is being changed. This field is supported by the Select Row Modifier popup. The valid entries are as follows:

- * Updates all rows.
- + Updates last row.
- # Updates a specific row.
- New 1** Inserts a new top row.
- New +** Inserts a new bottom row.

If no modifier is entered, the modifier is assumed to be "1". Thus, for data items for which there are multiple rows, the first row is modified.

Field

A check box that allows you to specify whether or not your new value comes from another People-Trak field or not. Select the check box to specify that the new value comes from a People-Trak field. Clear the check box to specify that the new value does not come from a People-Trak field.

New Value

The value to be placed into the updated field for each record qualified. If the Field check box is selected, the New Value field will utilize the Select Field popup to assist you. If the Field check box is not selected, the New Value field will be formatted to the attributes of the field type (date field, text, etc.).

Run the Database Manager

Once you have defined the Database Manager specification, you are ready to run it. Click the Run button on the Database Manager screen to run the specification. When the update is complete, a report is displayed with a listing of records updated for each field, with a page break between fields that were updated. A sample report is shown below.



Zee Technology, Inc.
Softball Update
Database Manager Audit Report

Result	Record
Set USR_FIELD_1 to Softball Team In Row: 1	Carpenter, Timothy A. Cannon, Carolinar C. Matthews, Susan R.

Import

People-Trak provides the Import feature to facilitate the conversion of data from another application into People-Trak. This option can be used to import data directly from xBase (Fox Pro, Dbase, etc.) files, Access files, Excel files, tab-delimited files, and comma-delimited files. If the product you wish to convert utilizes one of these formats directly, it can probably export to one of them, or at least to Excel. Once the data is in Excel, People-Trak can import it.

Most application products can produce one of these types without special processing. Once you have a file that you wish to import, you should check with your Support Representative to confirm that the formatting and structure of the file is appropriate for import. Some files need to be pre-processed to translate dates and code fields to the values required by People-Trak. For example, ethnicity codes are different in every product. You do not want to import the codes from another product into People-Trak unless they match exactly. Preprocessing can normally be performed using Excel or a text editor. The following information describes how the import processes different types of files:

Boolean (True/False)

Converts recognizable type to boolean or sets to false.

Numeric

Imports numeric or sets non-numeric to null.

DateTime

Imports date/time or sets non-datetime to null.

Text

Imports text, truncating to max People-Trak length, formats text according to People-Trak format, strips non-numeric characters from telephone and SSN.

There is one required field in an import file. That field is the unique ID (employee ID, applicant ID, etc.) that identifies the record within the company. If you attempt to import a file without an ID field, you will receive a message stating that the ID field is required. The ID field can be anywhere in the import file; it does not have to be the first field.

If the Company field is included in the source file, that is the company that is updated with the import data. If the Company field is not included in the source file, the current company is updated with the import data.

Note: The Import process should be used with caution. There is no undo feature, so a backup is recommended before performing the import. You will need a password from your Support Representative to run this process.

Import specifications are managed with the Explorer, which is identical to the Explorer used for documents.

The Import screen is displayed when you create a new or open an existing Import specification from the Explorer. The Import screen allows you to specify all of the information necessary to get data imported into People-Trak. Each piece of the import information is defined below.

Note: Import specifications do not appear in the Organizer desktop's Category pane like other documents. The Category assigned to an Import specification is used only for security purposes.

File Type

The type of file that will be imported. The applicable file types for this example are as listed below along with the associated file extensions:

Access	MDB or ACCDB
Comma Delimited	CSV or TXT
dBase	DBF
Excel	XLS or XLSX
Tab Delimited	TXT

File Name

The name of the file that will be imported. This field is supported by the Select File popup.

Table Name

This field is only visible when importing an Access file and is the name of the individual table that will be imported. This field is supported by a popup that lists the tables in the selected database.

Sheet Name

This field is only visible when importing an Excel file and is the name of the worksheet that will be imported for that file. This field is supported by a popup that lists the worksheets in the selected spreadsheet. If a spreadsheet has multiple worksheets, the first one is defaulted but can be changed.

Includes Header

A check box that allows you to specify whether or not the file to be imported includes a header row. The obvious reason for this field is so that People-Trak does not unintentionally create a record from header values. If you inadvertently do this, you must delete this record from People-Trak.

Import Field

The fields listed in the file that you have specified for import. If no fields are listed, click on the Connect button. If you still do not have any fields, some part of your setup was not performed accurately.

People-Trak Field

The People-Trak field to which the Import Field will be mapped. This field is supported by the Select Field popup.

Row Mod

The row modifier for the field. If the field you are attempting to import is a grid style field, the row modifier field allows you to identify which line on the grid is being imported. This field is supported by the Select Row Modifier popup. The valid entries are as follows:

+	Updates last row.
#	Updates a specific row.
New 1	Inserts a new top row.
New +	Inserts a new bottom row.

If no modifier is entered, the modifier is assumed to be "1". So, for data items for which there are multiple rows, the first row is updated.

Field Properties

This button allows you to see the attributes of the People-Trak fields you have selected for import. When you click on the Field Properties button, People-Trak will show you the attributes of the data for the particular People-Trak field referenced for the row at which your cursor is positioned. In other words, if your cursor is on a row that has Employee ID in the People-Trak Field, you will see the attributes of the Employee ID field. You can move the cursor to other rows that have People-Trak fields assigned and then click this button to look at further field attributes. This is helpful if you are not sure the type or length of a particular field into which you are going to import.

Connecting to the Import File

The Connect button connects to the specified file for mapping purposes. When you connect to the file, the header values will be displayed in the Import Field column for you. If you do not have a header in the file, the values from the first record will be displayed for you.

Analyzing the Import File

The Analyze Import File button allows you to analyze the data in the import file. When you click this button, the Import Analyzer screen is displayed.

The Import Analyzer provides important information to allow you to verify that the import specification is accurate before actually performing the import. Click the Analyze Import File button to view the Import Analyzer screen. All of the fields are for display only and defined below.

File Details

File Details include the name of the file being imported, the type of file being imported, table or sheet name, and the number of records to be imported

Note:For the Table or Sheet field, if the File Type is Excel – XLS, this field is the spreadsheet name. If the File Type is Access – MDB, this field is the table name.

Note:If you have a header row in the data file, the Includes Header row should be selected on the Import screen and that header will not be included in the Records count.

Data Analysis

The Data Analysis grid includes the following fields for the import file.

- Source Field Name
- Blank Values
- Max Length
- Destination Field Name
- Field Type
- Max Length
- Screen Name
- Sample Data

Source Field Name is the field name in the source data to be imported. If you have selected the Includes Header check box on the Import screen, which means you have a header row, the header fields will be displayed here. If you do not have a header, the field names “Field 1”, “Field 2”, etc. will be displayed here.

Blank Values are the number of blank values in this source field.

Max Length is the maximum length of the data in this source field.

Destination Field Name is the destination field name as defined in the People-Trak Field specified on the Import screen.

Field Type is the field type of the destination field. If this field type is numeric or datetime and the source data is not of that type, the imported field will be set to null.

Max Length is the maximum length of the destination field. Compare this length to the maximum length of the source data in this field. This will help you spot any length issues in advance of the import. If the source max length is longer than this max length, the data imported will be truncated to this max length and data will be lost. If you need the People-Trak field length increased, you can do so through Field Customization.

Screen Name is the screen name on which this field resides.

Sample Data is the data in this source field for the first few records in the source file, separated by commas. This allows you to actually see the data that will be imported into the destination field.

Run the Import

Once you have defined the import specification and used the Import Analyzer to verify that the specification is accurate, you are ready to run the import. Click the Run button on the Import screen to run the import. When the import is complete, an Import Log report is shown in the Document Viewer. A sample report is shown below:



From File: C:\pt9\samples\import.xls
To Company: ACTIVE

Imported Fields

EMP_NUMBER
NAME_LAST
NAME_FIRST
EMAIL

Records Imported: 33

Start Time: 10:40:21 AM
End Time: 10:41:10 AM
Elapsed Time: 49 seconds

After reviewing this log, check several of the records imported to verify the accuracy of the import.

Note: Data will not be imported for those records that do not have their Record Active check box selected. This is due to the fact that the Record Status check box should only be cleared for a record when no future activity on the record is expected.

Notes

Lesson 1

Database Manager

Lesson Contents

Tutorial 1.1 – Setting Fixed Values	10
Tutorial 1.2 – Copying Field Values	14

This lesson covers how to use the Database Manager to update data by setting fixed values and copying field values.

Tutorials

Setting Fixed Values: shows how to use the Database Manager to update data with fixed values.

Copying Field Values: demonstrates how to use the Database Manager to update data by copying values from other fields.

Tutorial 1.1 – Setting Fixed Values

People-Trak provides the Database Manager feature in order to enter and adjust data. It can be used to set the values for any field, to convert the field from one value to another, and to copy the contents from one field to another. The power and usefulness of this feature is often overlooked. Most users fully understand the feature only after they have performed a grueling data entry task manually. During initial data entry or at any time after that, you should consider using the Database Manager whenever a task seems data entry intensive.

Note: The Database Manager process should be used with caution. There is no undo feature, so a backup is recommended before making updates with the Database Manager. This process is password protected, which requires that you contact your Support Representative to access it. In training, we don't require the password.

1. Start People-Trak by double-clicking on the **People-Trak Trainee** icon on your desktop (or as instructed).

The Select Product Option screen is displayed.

2. The **Position Control** and **Attendance** options should be the only options that are toggled on. If not select the **Training** button to select them.
3. Click **OK**

The Login screen is displayed.

4. In the **User ID** field, enter **DEMO**.
5. In the **Password** field, enter **DEMO**.

The Organizer desktop is displayed with the Personnel Management module selected.

6. On the **Administration** menu, select **Database Manager**.

The Explorer for Database Manager specifications is displayed. This is the same Explorer used for documents.

7. On the **File** menu, select **New Database Manager** or on the Tool Bar, click the **New Database Manager** button to start a new database manager specification.

The Database Manager screen is displayed.

8. In the **Specification Name** field, enter **Test Spec**.
9. Leave the **Explorer Category** and **Category** fields as is.
10. Click the **Query** tab.

As you can see, the Database Manager uses the standard query grid, which allows you to specify which records should be updated. In this lesson, we want to update all employee records, so we will leave the query grid blank.

Note: Only the current company's records will be updated unless you list companies on the Spanning tab of the Company Properties screen for that Database Manager specification.

11. Click the **Replacement Values** tab.

The first thing we need to learn is how to select fields. There are two ways. You can enter the name of the field if you know it, or you can select the field using the Field Name popup button. In the beginning, using the Field Name popup button is much easier because you will not know the names of the fields from memory. Later you may find that you do remember many of the field names and you will enter them from memory. For now, I'll just tell you what to enter.

12. In the **Field Name** column, enter the field **City**. Skip the next two columns and position to the **New Value** column. Click the popup button to display a list of the cities in the **City** table. Select a city of your choice.

With the city selected, we now have a database manager specification. Let's run it.

13. On the **File** menu, select **Run Database Manager** or on the Tool Bar, click the **Run Database Manager** button to execute the change.

You may see a progress bar, but in just a few seconds, every employee record in the database will have been relocated to the city you specified. A report is then displayed with a listing of records updated for each field, with a page break between fields that were updated.

14. Close the **Document Viewer**.
15. Close the **Database Manager** screen. Close the **Explorer**.
16. Open a group of records, and then browse through the **Personal** screens, duly noting what the **City** field contains.
17. When you are satisfied, close the record group and return to the database manager specification we just created. Click the **Replacement Values** tab.

The Database Manager can change more than one field at once. In fact, you can damage your precious data beyond repair in minutes if you are not careful. Let's demonstrate a multi-field change.

18. Add the following fields to the specification: **Address 1**, **State**, and **Zip Code**. Then, put your own address, state and zip code into the **New Value** column.
19. When complete, run the specification.

It will take a few seconds for each field, but now you have lots of strangers living at your house. How will you feed them all?

20. Close the **Database Manager** screen, and close the **Explorer**.
21. Open a record group. Browse the group to confirm that you have more unwanted guests at your address than fish in the ocean.
22. While pondering the ramifications of what we have just done, close the record group.

We will have a better solution to this problem in the next tutorial. But while we are looking at the subject of setting fixed values, let's see how you would update a grid using Database Manager.

23. On the **Administration** menu, select **Database Manager**.
24. Create a new specification named **Test Spec 2**.
25. Click the **Replacement Values** tab.

Let's assume we just issued card keys to all employees on today's date. We could go into the Company Property grid and add that item for every employee, or we could do a mass update using the Database Manager. Let's see how the mass update works.

26. In the **Field Name** column of the first row, enter **Property Type**.
27. In the **Row Mod** column, click the popup button.

As you can see, you can update specific rows in the grid or add new rows. In our case, we want to add a new row. You have a choice of adding to the top of the grid using New 1 or adding to the bottom of the grid using New +. Let's assume we want our property type grid in ascending order by issue date, so we want to add our most recent property issue to the bottom of the grid.

28. Select **New +**.
29. In the **New Value** column, enter **Card Key**, overwriting the table.
30. In the **Field Name** column of the second row, enter **Issue Date**.

We want this date on the same row of the Company Property grid as the Property Type we just added, so we want the last row updated.

31. In the **Row Mod** column, enter +.
32. In the **New Value** column, enter today's date.
33. On the **File** menu, select **Run Database Manager** or on the Tool Bar, click the **Run Database Manager** button.

The Database Manager Audit Report is displayed.

34. Close the **Document Viewer**.
35. Close the **Database Manager** screen.

You can delete a database manager specification just like you deleted a document.

36. On the **File** menu, select **Delete Database Manager** or on the Tool Bar, click the **Delete Database Manager** button to delete the selected database manager specification.

The following message is displayed:

Delete the Database Manager specification highlighted and listed below?

Test Spec 2

37. Click **Yes**.
38. Close the **Explorer**.

39. Open a record group. Click the **Property** button to view the **Company Property** screen.

Confirm that the Card Key row has been added to the grid. Then take a look at this information for some other employees. Everyone should now have this entry.

40. Close the record group.

41. Continue with the next tutorial.

Tutorial 1.2 – Copying Field Values

In the prior tutorial, we learned that the Database Manager can be very useful when a field needs to be changed for a group of records. For example, in some states, city and county names are being changed to reflect an increased sensitivity to Native Americans. If you have hundreds of cities and/or counties to change, you can do it the hard way (one by one) or you can do it in seconds using the Database Manager. Simply use a query in the Database Manager to select all those records in a specific city or county and then set the city or county to the new name.

The Database Manager can also be used to copy the contents of one field to another. For example, if you have just trashed your demo database and moved umpteen people into your home, you will be looking for a way to correct the error. We'll demonstrate one method here.

1. On the **Administration** menu, select **Database Manager** and open the **Test Spec** specification created in the last tutorial. Click the **Replacement Values** tab.

In the last tutorial, we set fields to fixed or literal values. The Database Manager knew that the values were literal because the Field check box was not selected. When this field is not selected, the contents of the New Value column are moved “literally” into the field specified by the Field Name column. When the Field check box is selected, the New Value column must contain the name of a valid field within the module. When the Database Manager executes, it does not move the name of the field into the destination field, but rather moves the contents of the named source field into the named destination field. This is a field copy.

We are going to solve the problem we created in the last tutorial tolerably well. We are going to set the employee's address to the address of the first emergency contact. Given that the emergency contact is the spouse, this is an excellent solution. If the emergency contact is a mother-in-law, this is not the best fix. But it does demonstrate some powerful features.

2. Select the **Field** check box for each row in the specification. Then record the replacement fields as indicated below:

City	Contact 1 City
Address 1	Contact 1 Address 1
State	Contact 1 State
Zip Code	Contact 1 Zip

During the selection process, the fields are verified by the field lookup process to make sure you get them right.

3. When everything is ready, run the specification.

In just a few seconds, we will send all of those unwanted employees living at your place back to their own homes or at least to the homes of their primary emergency contacts.

4. When the process is complete, close the **Database Manager** screen. Close the **Explorer**.
5. Open a record group and compare a few employee addresses with their emergency contacts.

Other than fields we did not move (Address 2, Country, County, etc.) the addresses should be the same.

6. When you are satisfied that we have returned your home to you, close the record group.
7. This concludes this tutorial and lesson.

Notes

Lesson 2

Import

Lesson Contents

Tutorial 2.1 – Set Up Import	18
Tutorial 2.2 – Perform Import	20

This lesson covers how to set up and perform an import of data into People-Trak.

Tutorials

Set Up Import: shows how to set up the import specification.

Perform Import: demonstrates how to perform the import and looks at the results.

Tutorial 2.1 – Set Up Import

The Import feature is a critical part of implementing People-Trak if you have existing data that you want to bring into People-Trak. In this tutorial, you will set up an import specification to see how importing works. You will use an Excel spreadsheet that has already been created for you.

Note: The Import process should be used with caution. There is no undo feature, so a backup is recommended before performing the import. This process is password protected, which requires that you contact your Support Representative to access it. In training, we don't require the password.

Before we start setting up the import, we need to modify Donald's record so we can demonstrate how an import will update existing records.

1. Open **Donald Stern's** record and change his **Email** field to **dduck@zti.com**. Close **Donald's** record, saving your change.
2. Try to open the record for the employee with an **Employee ID** of **9999**.

You will find that there is no such record. The import has a record with an Employee ID of 9999, so we will see how an import will create records as well.

Ok, now let's set up the import.

3. On the **Administration** menu, select **Import**.

The Explorer for Import specifications is displayed. This is the same Explorer used for documents.

4. On the **File** menu, select **New Import** or on the Tool Bar, click the **New Import** button to start a new import specification.

The Import screen is displayed.

We aren't going to save this import specification, so we will leave the Import Name, Explorer Category and Category fields as is.

The first task required when creating an import specification is to identify the file to be imported. Let's do that now.

5. In the **File Type** field, click the popup button to display a list of the importable file types. Select the **Excel** file type.

After you select the File Type, you will see the Sheet Name field added below the File Name field. This is because you can have more than one sheet in a spreadsheet file, so you must tell People-Trak which sheet has the data you want to import. If you selected an MDB File Type, the Table Name field is added so you can select which table in the database has the import data.

6. In the **File Name** field, click the popup button to select a file named **IMPORT.XLS** in the **PT9\SAMPLES** directory of your local People-Trak drive.

After you make this selection the Sheet Name field is defaulted to the first sheet in this file. In our case, this is the only sheet in the file and the one we want. If there were

multiple sheets, you would need to use the popup to select the appropriate sheet from which to import.

7. Leave the **Sheet Name** field as is.

This sheet in the file has the following fields in it: Employee ID, First Name, Last Name and Email. It also has a header row, which requires that we select the Includes Header check box to tell the system not to include that row in the data to be imported.

8. Select the **Includes Header** check box and then click the **Connect** button.

The file will be opened and a list of the fields in the file will be displayed beneath the Import Field column on the grid. To finish setting up the import, we need only map the fields in the file to the actual fields in People-Trak. Here's how.

9. In the **People-Trak Field** column in the first row of the grid, use the popup button to display a list of fields and select the **Employee ID** field from the list of fields in the **Personal** category. Leave the **Row Mod** field blank because this is not a grid-style field.

Note: There is one required field in an import file. That field is the unique ID (employee ID, applicant ID, etc.) that identifies the record within the company. If you attempt to import a file without an ID field, you will receive a message stating that the ID field is required. In our case, the Employee ID is the first field in the import file, but it did not have to be first. In addition, if you want to import a record into another company, you will need to include the company number in the import file and map it to the Company ID field; otherwise, the record will be imported into the current company.

10. Complete the other fields in the list in the same way.

As a hint, the People-Trak field names are the same as the Import Field because we were being nice when we created the spreadsheet. This will not always be the case though.

If you are ever uncertain about the contents of a field when determining how the fields map, you can use the Analyze Import File button.

11. Click the **Analyze Import File** button.

A complete analysis of the file, including data samples is displayed. There is enough information to help you in the mapping process.

12. Close the **Import Analyzer**.

13. Continue with the next tutorial.

Tutorial 2.2 – Perform Import

We are now ready to import the data in the IMPORT.XLS file into People-Trak.

1. On the **File** menu, select **Run Import** or on the Tool Bar, click the **Run Import** button to start the import.

The import will be processed. A progress bar will indicate the records as they are being imported. When the import is complete, a summary report is displayed in the Document Viewer.

2. Close the **Document Viewer**.
3. Close the **Import** screen, without saving. Close the **Explorer**.

Now it is time to verify the results of the import.

For all records but Donald Stern's, current data was imported over identical existing data. There is no way to validate this; you will just have to trust me. For Donald Stern, however, the email address was changed.

Note: Data will not be imported for those records that do not have their Record Active check box selected.

4. Open **Donald Stern's** record.

His email address should now be back to his usual `dstern@zti.com`. The email address has been overridden with the import data.

5. Close **Donald's** record.
6. Use the Open Employee shortcut to display all of the records (just click the Search button). The records are already sorted by Employee ID, so page down until you find the record with an Employee ID of 9999.

This record was created by the import. The import process compares Employee IDs during import. If there is no existing record with a matching Employee ID, the import record is assumed to be an "add" rather than a "change". Employee ID 9999 existed in the import record but not in People-Trak, so a new record was created. That new record will only contain those fields that were actually imported. Donald Stern's Employee ID matched the Employee ID in the import file, so an existing record was changed.

7. Open the **9999** record.

Note that on the Personal screen, only those fields that were imported are shown.

8. Move through all of the screens and note that there is no additional information.

The Import process identified the import record as an entirely new employee and created a blank record for her. Then, the fields in the import file were recorded.

Let's do some housekeeping.

9. On the **File** menu, select **Delete Employee** and delete this 9999 record.

10. Close the record group.

We just performed a very simple import for demonstration purposes. Contact your Support Representative for more information when performing an import of your own.

11. Exit **People-Trak**.

12. This concludes this tutorial and lesson.