

Lucid Data Corporation

How to Import Data in to PDEExpress®

PDEExpress enables you to import and update records using Tab-delimited, ASCII text files, making it possible to transfer information from other data sources, such as a Human Resources system.

The import process consists of four steps:

1. Export data from your current system.
2. Create a template for the data to be imported.
3. Use Microsoft Excel to move your data in to the appropriate columns.
4. Use the Import tool to validate and import the data.

Step 1: Exporting data from your Current System

1. Records should be exported one database table at a time (e.g. Building, Staff, Presenter, etc.). Lucid recommends creating a separate import file for each set of records to be imported.
2. Name your import files with an extension of **.txt** (e.g., Building.txt, staff.txt, etc.)
3. Ensure that each record is on a single line of the import file.
4. Ensure that dates are exported in **mm/dd/yyyy** format.

Step 2: Create a Template

The Import tool expects a tab-delimited file where the first row contains the PDEExpress database field (column) names and subsequent rows contain the data to be imported.

You can use the PDEExpress Query tool to easily create a template for your data. Here's an example of how you might do this for Staff data.

1. Log in to PDEExpress, go to **Administration > Manage > Staff**

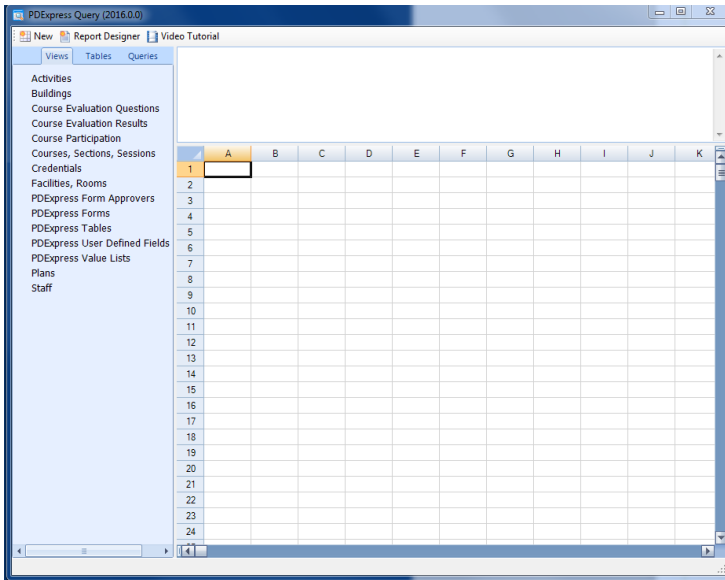
2. Add a new staff profile by clicking the **Add Staff Member**  button in the menu.

3. Fill in the required fields and click the **Add** button.
4. Click the staff member's name in the list to display their basic information in the bottom window pane.

Name	ID	Building	Phone	Ext	EMail	Title
Abrom, Nancy Jo	abromn452	Shade Early Childhood Center (SH)	(480) 859-4061		abromn45@redrock.k12.az.us	
Abrom, Nancy Jo	abromn45	Shade Early Childhood Center (SH)	(480) 859-4061		abromn45@redrock.k12.az.us	
Adams, Kathleen	adamsk88	Russell Elementary (RE)	(480) 859-5521		masson@lucid-data.com	
Adams, Linda	adamsl94	Schnell Elementary (SE)	(480) 435-1234		adamsl94@redrock.k12.az.us	Attendant
Adamsky, Kathy	adamskyk12	Transportation (TRAN)	(480) 434-7257		adamskyk12@redrock.k12.az.us	Bus Driver
Adornetto, Gary	adornettog38	Schnell Elementary (SE)	(480) 435-1234		adornettog38@redrock.k12.az.us	5th Grade
Aemi, Sarina	aemis68	Schnell Elementary (SE)	(480) 435-1234		aemis68@redrock.k12.az.us	1st Grade
Akrom, Amelia	akroma2	Middle School (MS)	(480) 859-8296		akrom@redrock.k12.az.us	"Cook, Part-time"
Alexander, Rita	alexanderr68	Shade Early Childhood Center (SH)	(480) 859-4061		alexanderr68@redrock.k12.az.us	Secretary
Babb, Julie	babbj07	C.F. Holliday Elementary (CF)	(480) 293-8461		masson@lucid-data.com	
Babcanec, Sheila	babcanecs44	Transportation (TRAN)	(480) 434-7257		babcanecs44@redrock.k12.az.us	Bus Driver
Bachman, Debra	bachmand14	Shade Early Childhood Center (SH)	(480) 859-4061		bachmand14@redrock.k12.az.us	Kindergarten Aide
Bachus, Sandra	bachus39	Shade Early Childhood Center (SH)	(480) 859-4061		bachus39@redrock.k12.az.us	Preschool
Bacic, Jeffrey	bacicj48	Middle School (MS)	(480) 859-8296		bacicj48@redrock.k12.az.us	8th Science
Backus, Jacqueline	backusj04	Senior High School (HS)	(480) 435-2211	261	backusj04@redrock.k12.az.us	Psychologist
Bagley, Amy	bagleya2	Frank Nicholas Elementary (FN)	(480) 859-3674		masson@lucid-data.com	

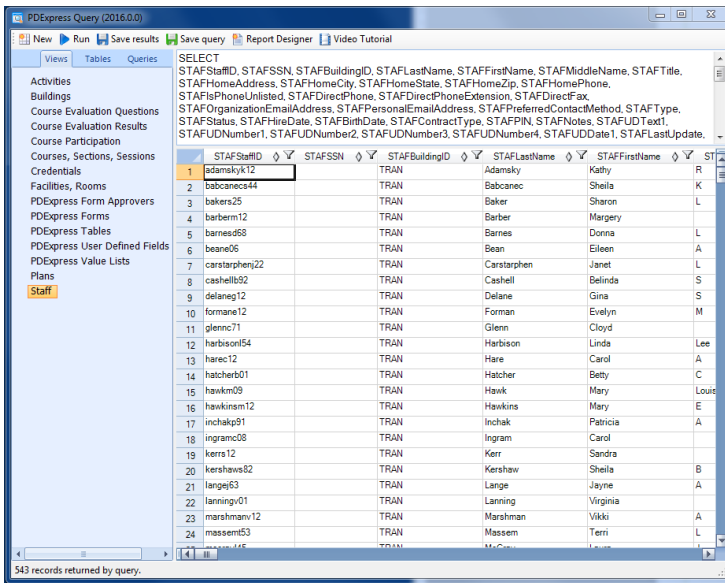
5. Add other fields of information you plan to import and then click the **Save** button.
6. Log out of PDEExpress.

7. Launch the PDEExpress Query Tool.



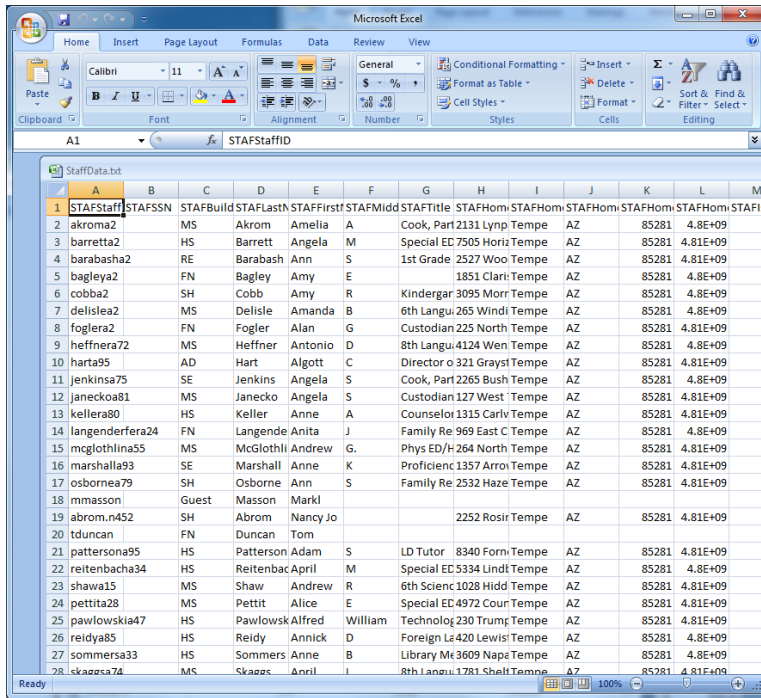
8. Select the **Tables** tab.

9. Drag and Drop the Staff table in to the large white block in the top right part of the window.



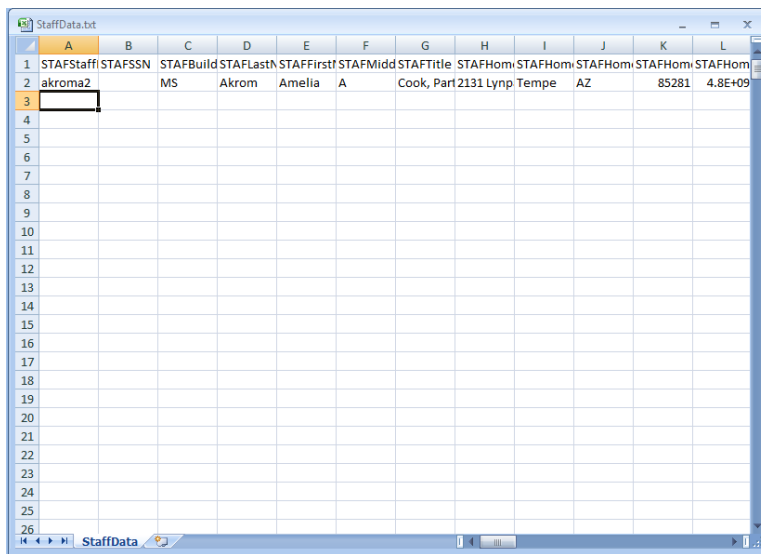
10. Click the **Save results** button to save the query results in the bottom part of the window to a tab-delimited file on your desktop.

11. Open the file you just saved in Microsoft Excel.



Hint: By default, Excel treats digits in a cell as numbers and eliminates any leading zeroes. If you do not want Excel to eliminate the zeroes, you can format the cells as "Text".

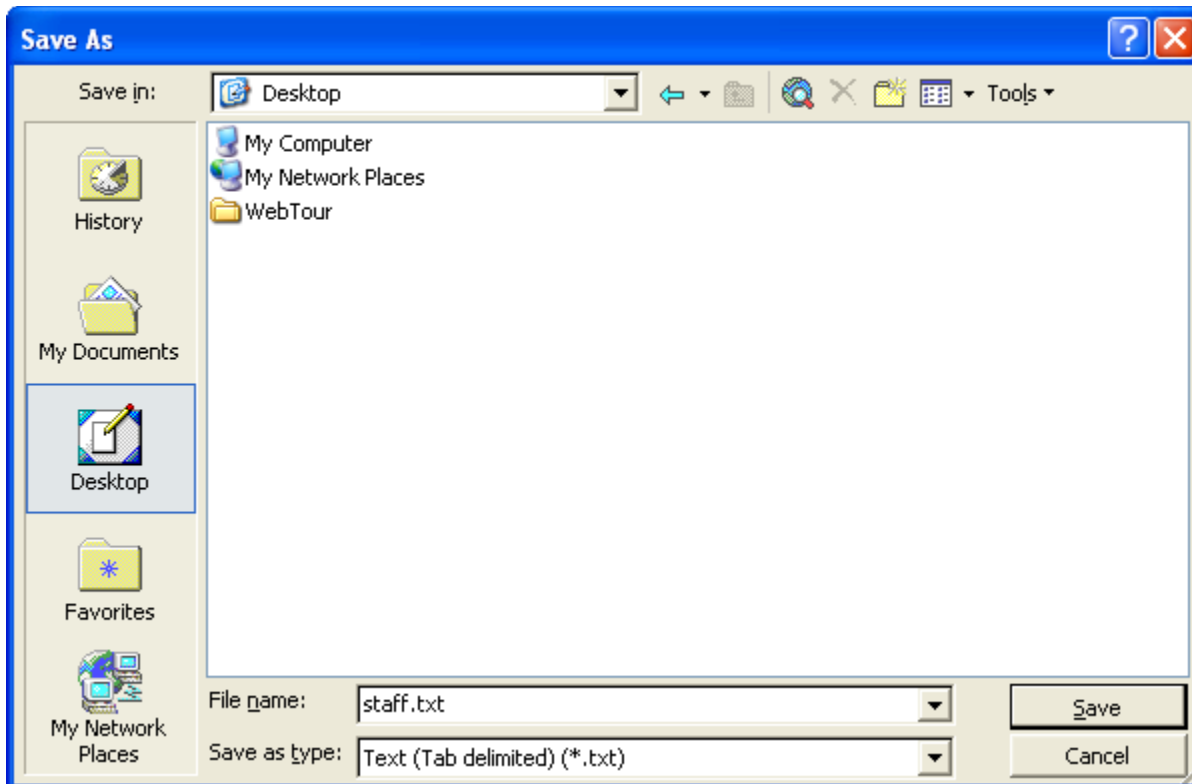
12. Delete all rows except for the first row containing the column headings and the row that contains the staff member you added in Manage > Staff.



13. This spreadsheet is the template you should use for importing your data.

Step 3: Prepare Your Data to be Imported

Once you have moved your data into the appropriate columns, use Microsoft Excel's **File > Save As** command and select the Tab Delimited (.txt) format in the **Save As** type drop-down list.



Microsoft Excel includes a variety of worksheet functions that may assist you in getting your data into the expected format. For example, the Left, Right, and MID functions can be used to build new columns of information based on other columns in your worksheet. The Replace function can be used to replace one character string with another.

Open the Text (Tab delimited) file in Windows Notepad and confirm there are no blank lines at the end of the file. In other words, the flashing cursor should remain in position 1 of the very last line in the file. Delete any blank lines, but ensure that there is one carriage return/line feed on the last data line of the file.

Consider the following guidelines as you prepare your data:

- The import window performs basic validations such as checking the data type and length.
- Do not use formatting characters in any field except for date fields.


For example, a Social Security Number should be entered as 333221111, **not** 333-22-1111.

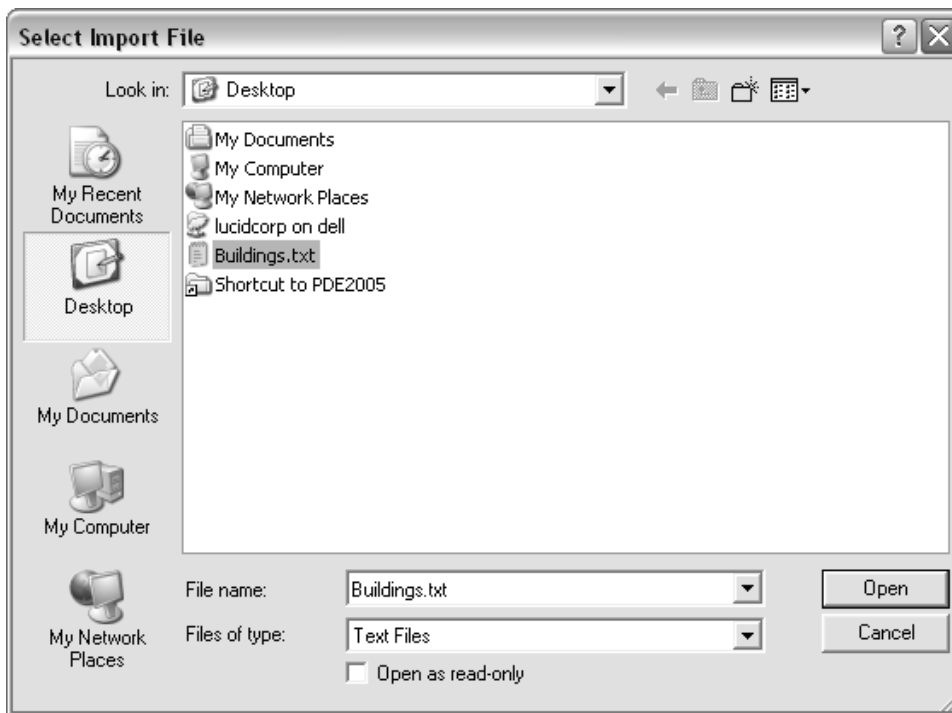
- Social Security Numbers should be right justified and padded with zeroes if there are less than 9 digits in the number (e.g. 075224323).
- Use slashes to separate the month, day and year in a date. (e.g. 04/01/2003)
- Include the area code with the phone number (e.g. 5135551212)
- The import window requires you to observe inter-table relationships when importing data. For example, the appropriate Building records must be in the database before importing Staff Records. Staff Records must be in the database before importing credentials, activities, courses, etc. The import window will skip records that do not meet these criteria.
- Use the following sequence if you are importing records into multiple PExpress™ tables:
 1. District
 2. Building
 3. Staff
 4. Credentials
 5. Activity

Step 4: Using the Import Window

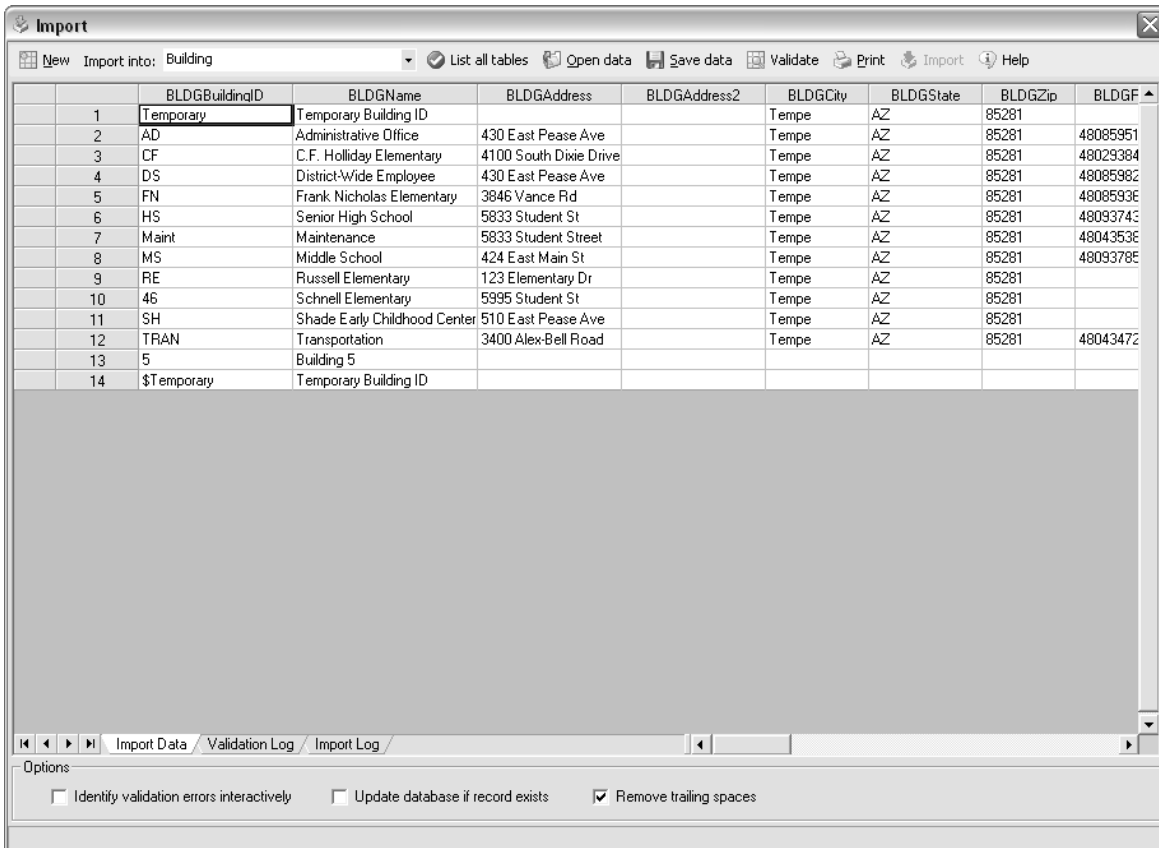
1. Run PDEExpress Import program.
2. Select the table you want to import records into from the drop-down list in the toolbar.

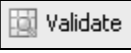
Database Table:

3. Click the **Open data** button  in the toolbar to select the file containing your data.

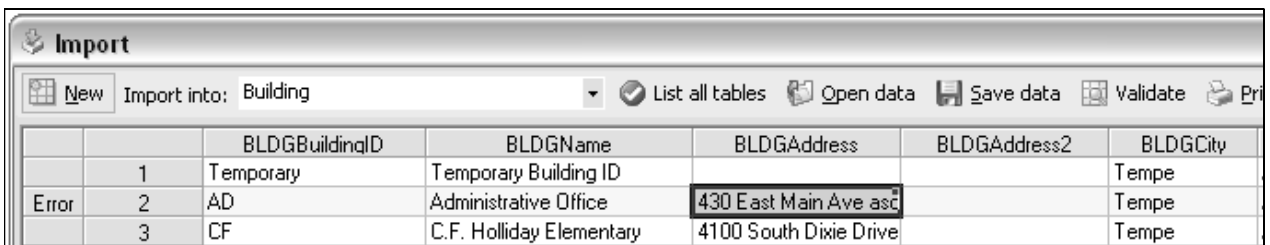


4. Click the **Open** button in the lower right corner of the Selection window.
5. Review your data in the import window.



6. Click the **Validate** button  on the toolbar to review your data for errors.

Errors will be highlighted and color coded and an entry is made in the Validation log.



You can display a detailed error message by pointing your mouse at the red indicator in the top right corner of a cell in error. For example:

		Tempe
430 East Main Ave asc		Tempe
4100 South Dixie Drive		Tempe
430 East Pease Ave	[BLDGAddress] contains	e
3846 Vance Rd	[430 East Main Ave	e
5833 Student St	asdlfkjasldjflkajsdlfkjalskdfjl	e
5833 Student Street	kajsdlkfjlaskjdfllkajsdlkfjalsk	e
424 East Main St	jdflkajsdlfkjalskdjflkasjdlfkjl	e
123 Elementary Dr	kj] which exceeds the	e
5995 Student St	defined length of [50].	e
er 510 East Pease Ave		e
3400 Alex-Bell Road		Tempe

7. You can make changes to your data in the Import window by double-clicking the cell and typing the correct information.

Note: You can copy and paste data within the spreadsheet by editing a cell, right-clicking your mouse and choosing copy, moving to the target cell and right-clicking and choosing the paste command.

Note: If you make changes in the Import window, you can use the **Save data** button on the toolbar to save the current contents of the Spreadsheet to a file on your computer.

8. Check mark the **Update data if record exists** option if you want to update data in the database with data in the import file.
9. Check mark the Add unrecognized values to value lists if you want the Import tool to add new values to the corresponding value lists based on the import data.
10. Click the **Import** button to import the records.

Note: The Import window displays progress messages in the status bar at the bottom of the window.

11. The Import creates a log file in the third spreadsheet tab named Import Log. Click the Import Log tab to view the additional information.

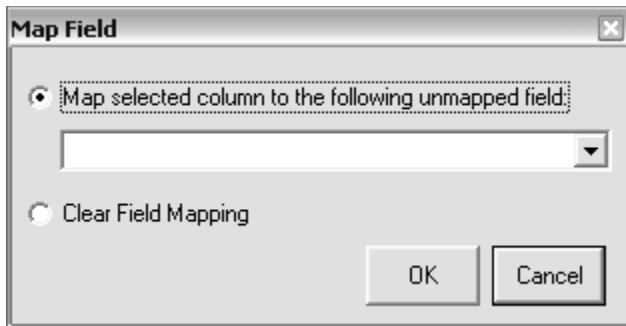
Note: It is possible to move back and forth between the logs and the import data by double-clicking the corresponding row in the log.

Additional Considerations for Using the Import Window

1. The Import window matches the names in the first row of the import data file with the database field names. Any column where the name in the first row does not match or is blank is automatically ignored by the Import window.

Note: This may be helpful if you need to add columns to the import template that are based on other calculations. Leave the name at the top of the column blank to ignore it.

2. Double-clicking on a column heading in the import window opens the mapping tool which may be used to clear or map a database field to a column in the import data.



Data in a selected column may only be mapped to one database field and vice versa. Once a field is successfully mapped in the Import window, that field name is removed from the drop-down list in the Map Field window.

3. Because the Import Utility uses Tab characters to determine where one field ends and another begins, it is very important to remove extraneous tabs from your import data.

For example, tab characters in a course description will cause the remaining fields to be offset and misaligned with the corresponding database fields.