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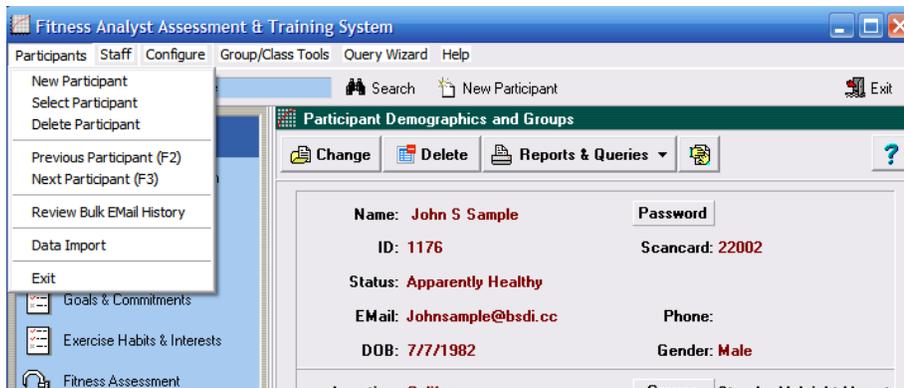
If you routinely import data from another system, you will be able to automate the data import. The utility will create a Windows batch file that will encode all of your import settings. In future you will then just run this batch file to automate your data imports.

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.
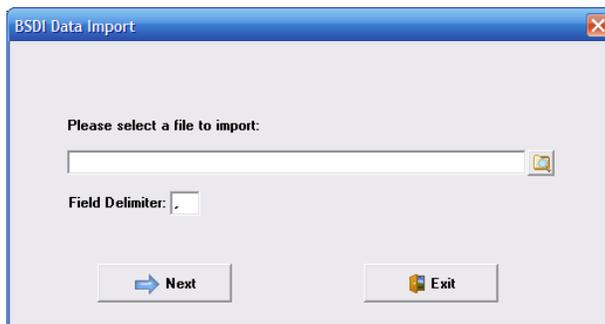
Procedure

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.
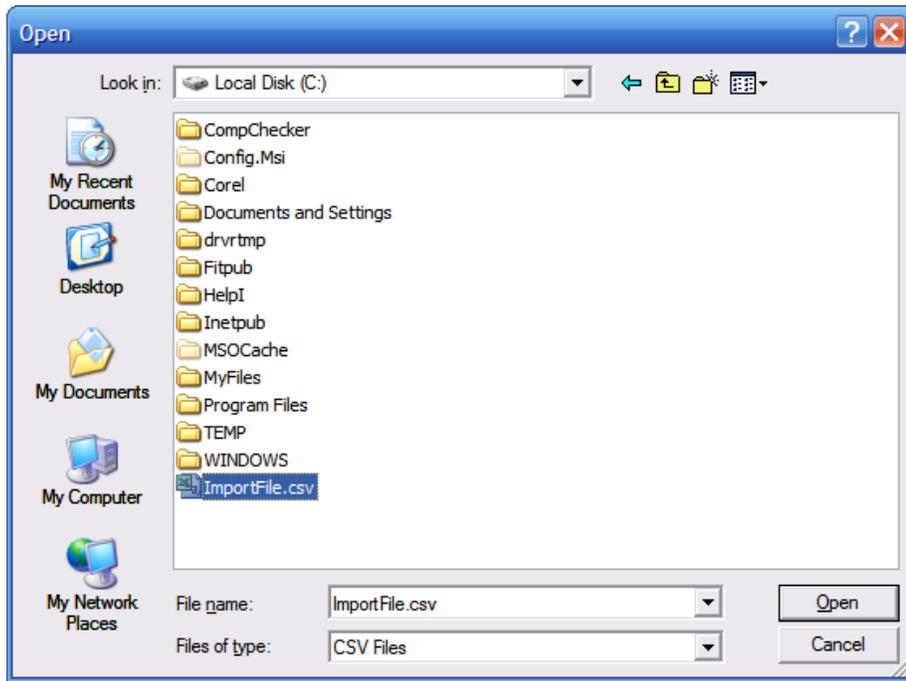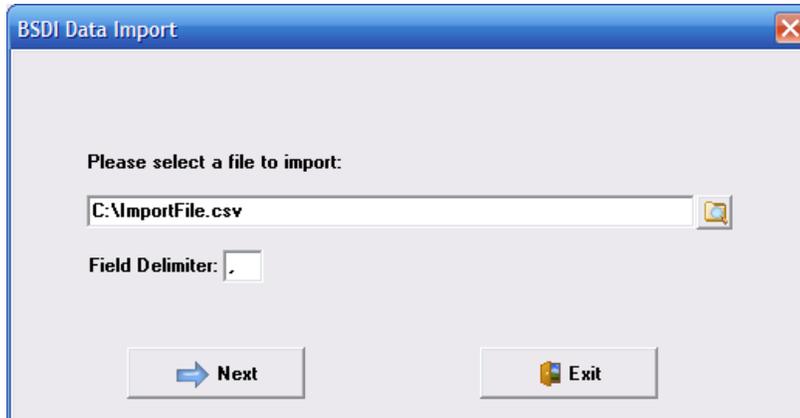
1. Click on "Participants" from the submenu.

2. Select "Data Import" from the dropdown menu.
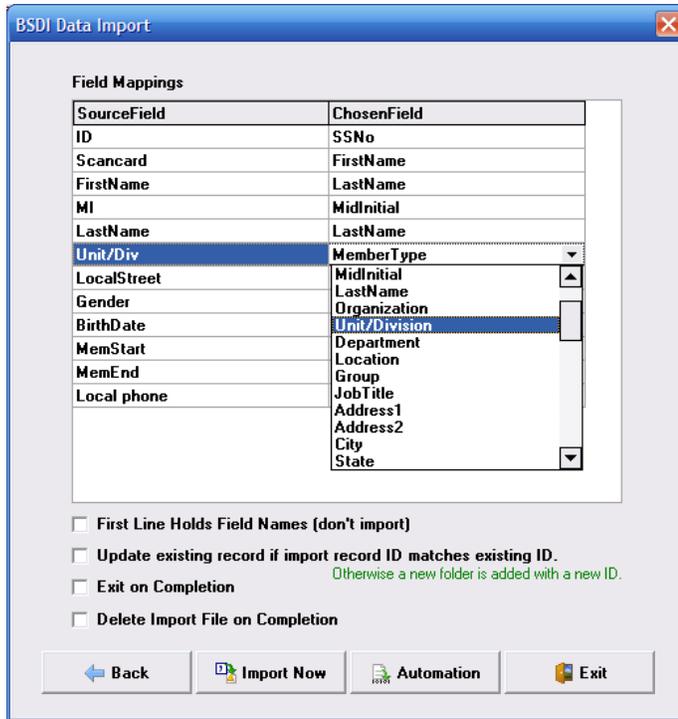
3. Click on the [icon] icon.

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

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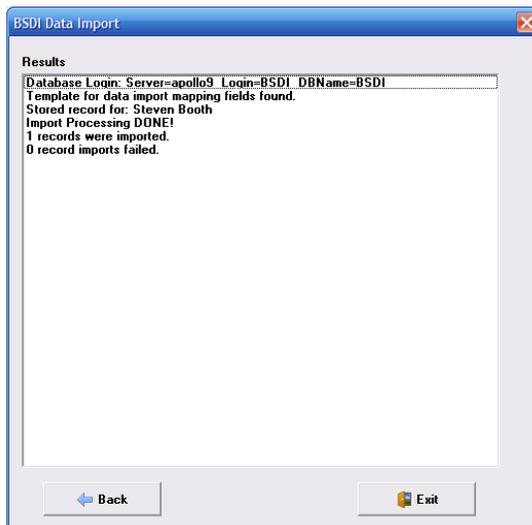
7. If the first line of your import file contains field names (as in the example above), then check:

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

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

10. When the import has completed an informational summary is displayed in the "Results" pane.

11. Click on "Exit" to close the utility.

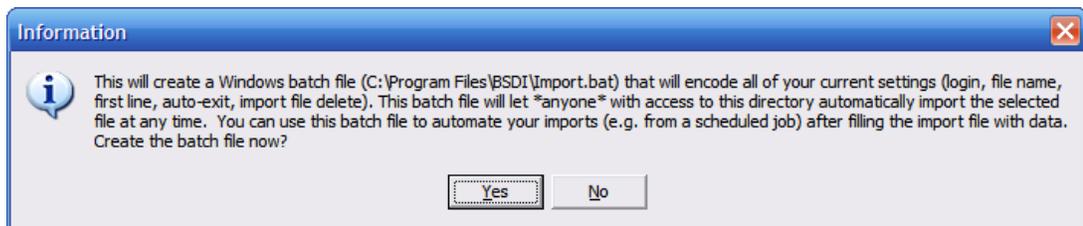## Procedure for the Automation of the Data Import

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.**
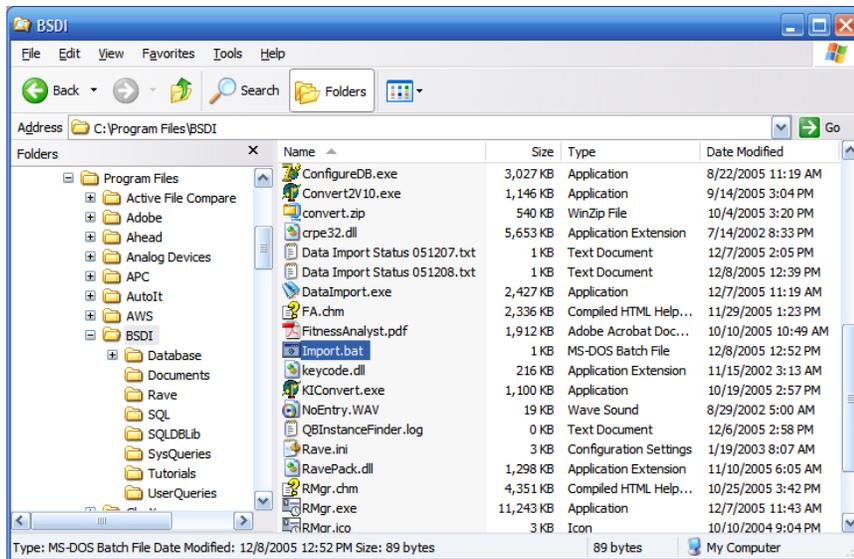
1. If you wish to have the automated import close automatically ensure that you check "Exit on completion" checkbox.

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.

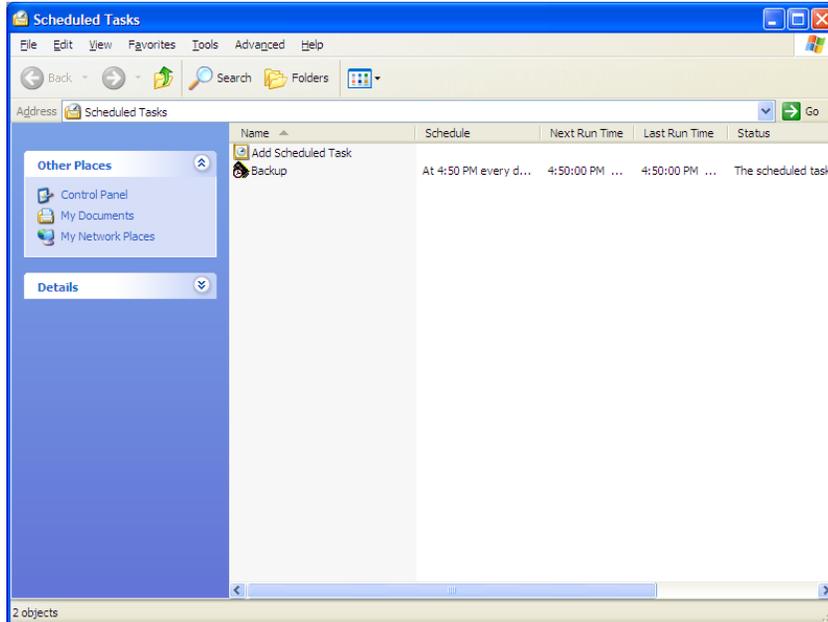4. An informational dialog window will open. Please take the time to read its contents.

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).

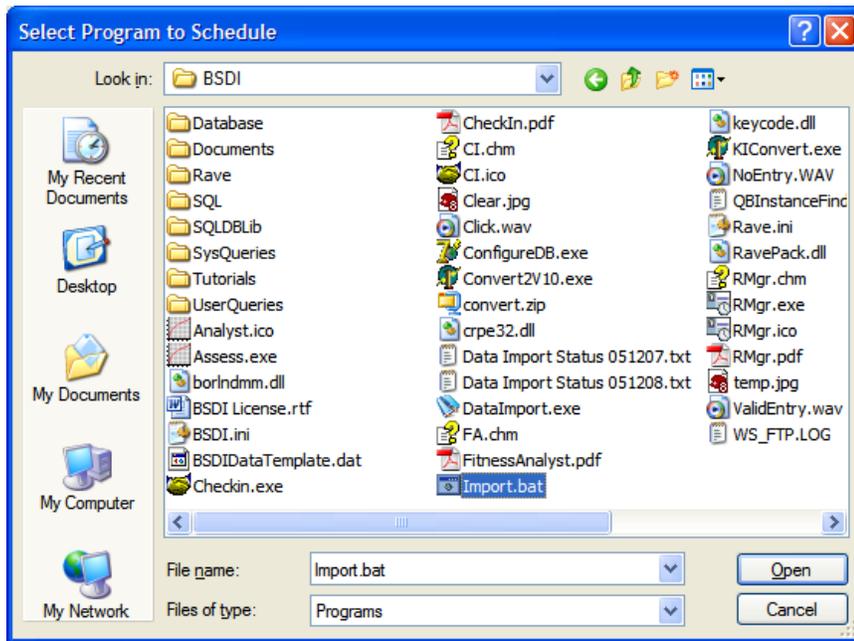## Scheduling the Import file to run automatically with the Windows Scheduler.

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.

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.

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

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.

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".

16. Click Finish.