

Configuring and Using the Asset Import Converter

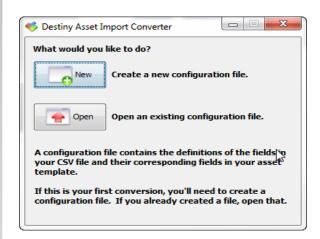
The process of importing a data file of resource information by means of a comma separated value (CSV) format requires the following steps: 1) obtain a CSV file of the resource data; 2) configure Destiny's Asset Import Converter; 3) prepare the CSV file for conversion by mapping the contents to your resource type templates; 4) convert the CSV file to XML format; and 5) import the XML file to Destiny.

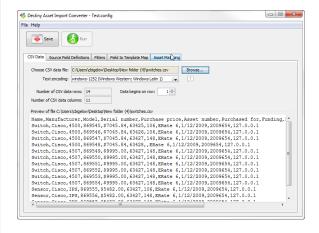
Note: Before you begin using the Asset Import Converter, create a working folder for the files. See the *Preparing the Asset Import Converter* quick reference guide for instructions.

Use the following steps to configure the Asset Import Converter to suit your CSV file and your preferences.

Creating a Configuration File

The process of configuring the Converter starts with the creation of a configuration file. To create the configuration file:

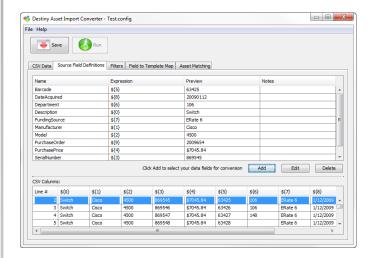




- Open the AssetImportConverter.exe application.
- When the configuration-file dialog box opens, click **New** to create a new configuration file. You will save the definitions of the fields in your CSV file and the corresponding fields in your resource template to this configuration file.
- When the Create a New Configuration dialog box opens, click Browse to select the resource tree template file that you exported from Resource Manager.
- 4. The resource types in your Resource Manager template appear in the **Preview** window. If this is the correct template file, click **Create**.
- In the Save As dialog box, enter a name for the configuration file. You must keep the CONFIG file extension.
- 6. The Converter opens to the **CSV Data** tab. Click **Browse** to select your CSV data file.
- Review the data in the **Preview** pane. If they do not appear correctly, you may need to select a different **Text encoding** from the drop-down.
- 8. From the **Data begins on row** drop-down, select the row number of the first data record. Do not count any header rows.

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Next, define the contents of each of the columns (the source fields).



Click the **Source Field Definitions** tab. Each column, or source field, in your CSV file appears in the table at the bottom. You need to define the contents of each column. Select each field in the template that will receive a value during the import defining its type and format, and selecting the CSV column containing that data.

Please note that the first field is Field \${0}, not Field \${1}.

For error-free conversion, make sure to do the following:

- Define the key field that identifies each record's resource type. This is most likely Description or one of the fields that makes up the Displayable Name.
- Define the Barcode number and Site Short Name for each incoming item.

To define the source fields:

- 1. Click **Add** to open the Source Field Editor, and then start defining the fields.
- 2. At the top of the Source Field Editor, enter or select a template field name for the CSV file containing data. Selecting the template field name from the drop-down—rather than typing it in—allows the Converter to map the data automatically during the Auto Map process.
- 3. From the **Type:** drop-down, choose the data type. Please note that Currency and Number types convert to Strings in the XML file; then during import, Destiny reformats them to match the resource type field.

Additional tips for defining the source fields

For a **Date** field, if the format that displays in the Preview box is not correct, click **Edit**. From the **Choose Date Format** pop-up, review the **Sample Date String**, and then select the correct **month**, **day**, and **year** order from the drop-down. In the table, select the best date format, and then click **OK**.

For **Custodian** fields, map it to your patrons' **District ID** field through **Insert CSV Field**. If needed, you can map it by referencing other fields with Insert Source Field or create a lookup table with **Field Value Transforms**.

- 4. From the **Insert CSV Column** drop-down, select the column in the CSV file that corresponds to this template field.
- 5. The Converter displays the converted data in the **Preview** box—or describes any error.
- 6. When the CSV data are correct, click **Save**.
- 7. Follow the same steps for each field in the **CSV Columns** table.

Applying Special Formatting

If you need to apply special formatting, you can string together (concatenate) part or all of multiple fields, insert functions, define regular expressions (regex) and constants, substitute one value for another, or create virtual CSV fields.

Use the **Insert Function** option to extract only the data you need for resource fields in Destiny. You can use special formatting such as change case, delete spaces, identify substrings, use regular expressions, or concatenate multiple fields.

Given this CSV line:

{0}	{1}	{2}	{3}	{4}	{5}	{6}	{7}	{8}
Switch	Cisco	4500	869545	\$7045.84	106	1/12/2009	2009654	127.0.0.1

By applying custom formatting, you can produce values such as the following:

Selection	Expression	Input	Result
Insert CSV Columns, concatenating them	\${5}\${3}	106,869545	106869545
Insert Source Field, add a hyphen	\${Site}-\${SerialNumber}	106, 86945	106-869545
Insert CSV Column, add literals	SWI-\${2}-\${5}	4500, 106	SWI-4500-106
Insert Function regex*	\${4,regex("([0-9]{4})","{\$1}")}	\$7045.84	7045
Insert Function substring*	\${7,substring(1,4)}	2009654	2009
Insert Function substrings, concatenating them*	\${3,substring(3,4)}\${7,substring(1,4)}	869545, 2009654	95452009

^{*} When using the **Insert Function** option, make sure to replace the word "field" in the expression with either a CSV Column number or a defined Source Field name.

Note: Using 'site' for anything other than Site Short Name is not recommended unless a field such as 'original purchasing site' is used to house data.

Substituting Field Values

For a field whose value requires mapping to another value, you can enter a single constant in the Source Field Editor Expression box or set up a lookup table for multiple values.

Using a Single Value

Enter or select the template field at the top, and then type the value in the **Expression** text box. This assigns the value to every record in the file.

Additional tip for using a single value

If the CSV file does not contain barcode numbers, you can set a value for the field "Barcode" of "TBD". This satisfies the Converter's requirement that all items have barcode numbers. When you import the XML file into Destiny, select **Always add the incoming item record and assign it the next available barcode** in Import Resources to have Destiny auto-assign barcode numbers.

Note: Always add the incoming item record and assign it the next available barcode should only be used with a file to add new items in Destiny Resource Manager. This process does not allow existing items with matching District IDs to be updated.

Changing Multiple Values

You can create a lookup table when a source field has several values that each need to be changed to another value.

- 1. On the Source Field Definitions tab, click Edit.
- 2. Enter the template field and expression.
- 3. Click Field Value Transforms.
- 4. Click Add.
- 5. In the table row that appears, enter the value from the CSV file in the **When the field's value is** column on the left.
- 6. Enter the value you want it changed to in the **Change it to** column on the right. Continue adding all possible values.
- 7. To define a default value for a field, enter "default" (no quotation marks) in the left column and your default value in the right column. A default value is used if the CSV data does not match any other defined mapping values or if it is missing from a row.
- 8. Click **Save** when you are done.
- 9. Verify your mapping by reviewing the value in the **Preview** box on the Source Field Editor.
- 10. If the mapping is correct, click **Save**.
- 11. Highlight any of the lines in the bottom pane on the **Source Field Definitions** tab, and then review its mapped value in the **Preview** column in the top pane.

Specifying Matching Fields When Converting Data

Before importing resources, Destiny checks to see whether the incoming resource items already exist in your database. Destiny can determine whether an incoming item matches an existing item by comparing either the item's barcode number and Site Short Name or the item's District ID. To specify matching fields:

- 1. In the Asset Import Converter, open the **Asset Matching** tab.
- 2. Under **Match assets using their**, select the unique identifier your school or district uses—either **Asset District Identifier** (District ID) or **Asset Barcode** (barcode number).

Defining Virtual Fields

If your CSV file does not contain a field that you want in your records in Destiny, you can create a virtual field and define its value as long as the value is the same for every record. You could also define a virtual field and then use it as a component of another field. For example, if the CSV file does not include a field for the required Site Short Name, you can select that template field and define a literal expression, such as "WashHS".

Skipping Incoming Records

If you want the Converter to skip (ignore) any resources in the CSV file based on certain criteria, open the **Filters** tab. **Under Skip CSV rows when**, select either the **ANY** or **ALL** condition. Then, click **Add** to enter one or more conditions.

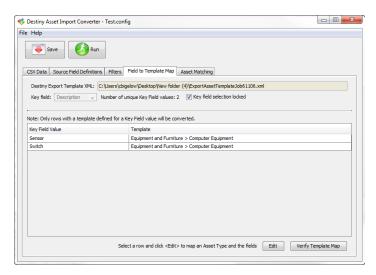
As the Converter processes each CSV record, it tests its data. If the data match the conditions you define, the Converter skips the record and does not add it to the import XML file.

Associating Asset Item Records With Asset Templates

When you have defined all the fields you want to import, you next need to select the source field that identifies each row as belonging to a specific resource type in the Destiny Resource Manager template file.

To identify this key field and map each resource type in the CSV file to its resource type in the template:

- 1. Click the **Field to Template Map** tab.
- 2. Select **Key field** from the drop-down. The Converter searches the CSV file, displays the number of unique key field values, and lists them in the lower pane.
- 3. Double-click the first row of the list, or click the row, and then click the **Edit** button.
- 4. The **Field Mappings** screen opens. Select the Resource Type from the drop-down.

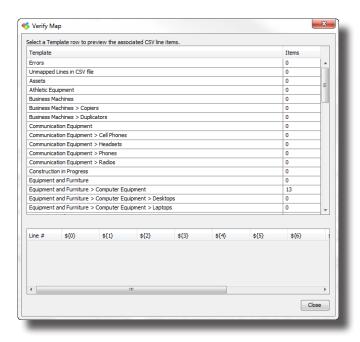


Note: To indicate that a resource is software, as opposed to hardware, select the **Is this item a software license?** checkbox. If you select this checkbox, the resulting XML file contains a license> element in place of an <item> element.

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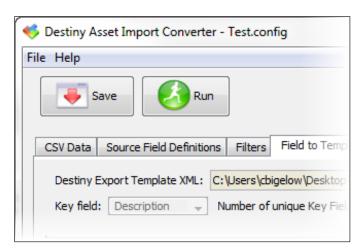
- 5. Click the **Auto Map** button.
- 6. The Converter maps each template field for this resource type to the appropriate source field in the CSV file.
- 7. If the Converter maps any fields incorrectly or not at all, click the row in the **Source Field** column, and then select the correct field from the drop-down that appears.
- 8. When the Converter has mapped all fields correctly, click **Save**.
- 9. Repeat these steps for each **Key Field Value** row on the **Field to Template Map** tab.

Checking for Errors



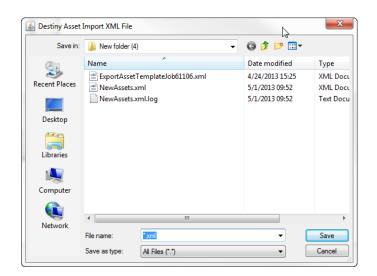
After you map all the resources to the template, ensure the Converter was able to map the resources correctly and no errors exist:

- 1. Click Verify Template Map.
- 2. The first entry on the **Verify Map** popup is **Errors**. Click the row to display any errors in the **Preview** pane below. You may need to correct some of the errors in the CSV file and then re-open the file in the Converter.
- 3. Click **Verify Template Map** to confirm that you have eliminated the errors and to check for any additional errors.
- 4. The value for the next row, Unmapped Lines in CSV file, should be 0. If it's not, click the row to display the unmapped lines in the Preview pane, and then click Close to return to the Field to Template Map and map these lines.



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- After making any changes, verify the template map again. When you have corrected any errors and mapped all the records (the first two rows on the **Verify Map** dialog box have values of 0), click **Close**.
- Click **Save** to save this configuration file. Note that you can use this configuration file for future configurations that use the same resource template file and a different CSV file.



You are now ready to run the Asset Import Converter.

Running the Asset Import Converter

To run the Asset Import Converter:

- 1. Click Run.
- 2. In the **Destiny Asset Import XML File** dialog box that appears, select your working folder location, and then enter the name of the output file.
- 3. The Converter creates your XML file along with a log file.
- 4. A dialog box confirming the conversion of CSV data appears with the name of the created XML file.
- 5. Examine the log file before you import the XML file to Destiny. It lists the number of converted resources; the number of skipped, unmapped, or badly formed rows; and the number of rows missing required fields or containing mismatched data.
- 6. In addition, a browser window opens displaying the first 10 records, which lets you verify that your output XML file is as expected. If it's not, you need to adjust your configuration.
- 7. After reviewing the preview, close the browser window.
- 8. If your output file is satisfactory, close the Converter by choosing **Exit** from the **File** menu.

Now that you have successfully converted your CSV file to XML, you are ready to import your resource information to Destiny.

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