EZ2-Import Guide

EZ-CARE2

SofterWare, Inc.

EZ-CARE2 Version 7

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EZ2-Import Overview

The EZ2-Import module is an optional module of EZ-CARE2 that allows you to import data from external files into EZ-CARE2.

Ordering and Activating the EZ2-Import Module

The EZ2-Import module of EZ-CARE2 is included with the basic installation of EZ-CARE2, but is not enabled by default. In order to enable the module, you must purchase and register it.

Please contact your SofterWare representative to purchase a license for this module.

Once you purchase a license for the module, you will be given a new registration code that you can use to activate the module. See "Registering New Modules" in the "Office Administration" chapter of the *EZ-CARE2 User Manual* for details.

Workflow

The EZ2-Import process consists of the following steps:

1. Preparing the import data file to be imported.

2. Setting up the import map by specifying the import data file, and mapping the fields in the import data file to EZ-CARE2 file cabinet fields.

3. Importing the data into EZ-CARE2.

Preparing the Import Data File

Import Data File Formats

The data file can be in either of the two following formats:

- Comma Separated Value (CSV) file – It must conform to the following specifications:

  - One line per record.

  - The data fields in each line are separated by commas:

    `Value 1,Value 2,Value 3,Value 4,Value Last`

  - Quotation marks are not required to be placed around fields.

  - Data in the fields may be upper or lower case, and may contain spaces, hyphens, or dashes. Fields may not contain commas, quotation marks, or hard returns.

  - The first line contains a header record with the field names of the source information. The data begins in the second line.

  - We recommend you set the file extension to **.CSV**.

- MDB or Microsoft Access Database file – Relationships between tables are included in the MDB to support the EZ-CARE2 import using multiple source tables like family and child.

> **Note:** If you're including any picklist items in the import data file, they can only be up to 35 characters in length. Items longer than 35 characters will be truncated, and will cause duplicated records in the picklist table.

Topics in Import Data Files

Data can be imported into EZ-CARE2 in many different combinations. The four primary types of input (called "Topics") are FAMILIES, CHILDREN, STAFF, and LEDGER TRANSACTIONS.

FAMILIES Import Data Files

Importing FAMILIES: When importing families, each record of the source input file may contain the following information:

- Family Data (destined for the Family or Ledger tabs)

- Family Contacts (destined for a Family Contacts superfield)

- Family Notes (destined for a Family Notes superfield)

- Family Checklist (destined for a Family Checklist superfield)

- A/R Transactions (destined for the A/R Ledger)

- EFT Account Information

The information for a single family can be contained in multiple records, including "transactional" data such as ledger data, contacts, notes, etc. Represented in columnar form, an import might include the following sample information:

PARENT 1 Data					Contact Data		A/R		
STATUS	P1-LAST NAME	P1-FIRST	CITY	STATE	P1-PHONE#	NAME	PHONE#	CATEGORY	CATEGORY TYPE	AMOUNT
ACTIVE	Doliff	Chris	Arlington	VA	356-873-2938	Brian Doliff		DEPOSIT	R	100
ACTIVE	Berry	Robert	Dresher	PA	215-643-2934			DEPOSIT	R	200
ACTIVE	Berry	Robert	Dresher	PA	215-643-2934			PAYMENT	P	-100
ACTIVE	Johnson	Sean	Chicago	IL	312-489-3294	Erica Borden	312-884-2332	BAL FWD	R	500
ACTIVE	Johnson	Sean	Chicago	IL	312-489-3294	Ella Smith	312-856-7290	DEPOSIT	R	150
ACTIVE	Johnson	Sean	Chicago	IL	312-489-3294	Maria Alonzo	312-724-9876			
ACTIVE	Patterson	Martin	St. Paul	MN	612-536-7652					
ACTIVE	Moore	Paula	St. Paul	MN	612-443-0431	James Rent	612-787-3636	DEPOSIT	R	200
ACTIVE	Moore	Paula	St. Paul	MN	612-443-0431			PAYMENT	P	-100

Although a single source record may contain data from different tables (for example, Contacts and A/R transactions), there is no association between those pieces of information. For example, the second record for Sean Johnson has a contact name of Ella Smith and an A/R deposit transaction of $150; Ella Smith has nothing to do with the $150. For Sean Johnson, three contacts and two A/R transactions are imported.

In general, it may be easier to set up separate import files for the different types of data, even though that will mean importing the data in several "passes."

STAFF Import Data Files

STAFF files are very similar to FAMILIES files, except for the following details:

- STAFF files do not contain Accounts Receivable transactions.

- STAFF files may contain fields from the Class table.

- Staff Contacts (Destined for the Staff Contacts superfield)

- Staff Notes (destined for the Staff Notes superfield)

- Staff Checklists (destined for the Staff Checklist superfield)

CHILDREN Import Data Files

Importing CHILDREN: Similarly, when importing children, each record of the source input file may contain the following information:

- Family Data (destined for the Family tab)

- Child Data (destined for the Child tab)

- Child Contacts (destined for a Child Contacts superfield)

- Child Notes (destined for a Child Notes superfield)

- Child Checklist (destined for a Child Checklist superfield)

LEDGER TRANSACTIONS Import Data Files

This topic is primarily used to import Click-To-Pay transaction information to the Ledger tab.

Unlike the FAMILY topic, the LEDGER TRANSACTIONS topic requires that you use the Ledger ID field as a key.

When importing ledger transactions, each record of the source input file may contain the following information:

- Family Data (destined for the Family tab)

- Ledger Data (Destined for the Ledger tab)

- EFT Data (destined for the Ledger tab)

- Family Contacts (destined for a Family Contacts superfield)

- Family Notes (destined for a Family Notes superfield)

- Family Checklist (destined for a Family Checklist superfield)

Defining the Import Map

Once you've created your input file, you must define your import map. The import map determines how the information is to be transferred from your input (source) file to the EZ-CARE2 cabinet. To specify the mapping, create a Saved Import in Office Administration. You can do this either by creating a New import or by editing (or duplicating) an existing one, in the Library of Saved Imports.

Creating a New Import Map

To create a new import map

1. Open the **Office Administration**, double-click **Chapter 2 (Cabinets & Drawers)**, and double-click **Import Data**. The Library of Saved Imports opens:
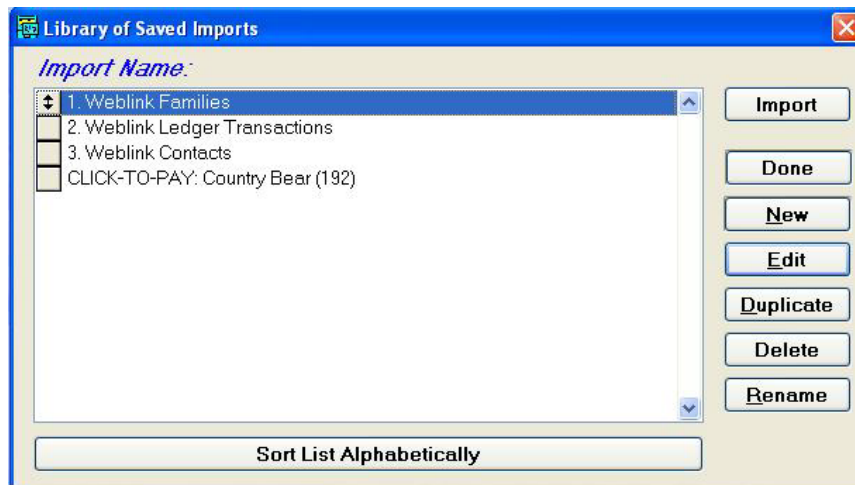
2. Click the **New** button. The Step 1 screen of the Import Wizard appears:

3. Specify the **Name** of the import.

4. Enter the name and path of the source file in the **From File** field, or click the
   ... button to select the file name and location.

> **Note:** When using an MDB file a new line appears under the **From File** field, and will ask for the Main Table.

5. Select a **Cabinet** and **Topic**. The **Topic** of your import is the type of records you will be importing (see the discussion of FAMILY vs. CHILD topics above).

6. Under **Operation** select the method you will use to import records :

Overwrite   Erase (delete and remove) all records in the cabinet prior to importing the new ones. Then, generate a new record for each source record, with values prescribed by the mapping of fields.

> **Warning!** Using **Overwrite** is only done in certain cases, such as initially installing your data. It removes all data specified in your topic including Zipcodes and classes which may cause a problem with other topics using those tables. Use with caution.

Append   Generate a new record for each source record, as described in the mapping. Even if a record with the same information already exists in the cabinet, it imports the new record anyway. It creates new records for all records in the file, even if there is a match. (This operation is rarely used.)

|	
Merge - append new records	Uses the selected key field(s) to find records in the destination. For each initial match, replace the destination fields with values as described in the mapping. When no match is found, generate a new record and append it to the destination cabinet. This must be used if you want to keep existing classes and zip codes (note that these tables are also used in the staff and other drawers; therefore, if you overwrite them, they will be removed from those tables). If there are multiple records in the source with the same key, only the first record is merged or appended; the rest are ignored.
Merge - discard new records	Use the selected key field(s) to find records in the destination. For each initial match, replace the destination fields with values as defined in the mapping. When no match is found, DO NOT generate a new record, but report a mismatched key (for example, a record that doesn't exist in the destination cabinet and therefore can't be updated). If the system finds keys that do not match, a report is generated that details the non-matched keys. If there are multiple records in the source with the same key, only the first record is merged, unless you check the **Update all records matching key criteria** option on step 2 of the Import Wizard.

> **Note:** Merge/Discard allows you to update multiple records using a "key." This is useful if you are updating school name, address, and district using the school code as the key. During the mapping process, you must check the option to update all records matching key criteria. This allows you to update all the related information for the record just based on the key, so that you do not have to type the other information into the system. In order to do this, you'll need to set up a spreadsheet saved as a .CSV file with the names of the schools, addresses, and any other information; when you import it, you'll use the school code as the key.

7. When you are ready to proceed with the definition of the import map, click on the **Next** button. The **Step 2** screen of the Import Wizard appears:
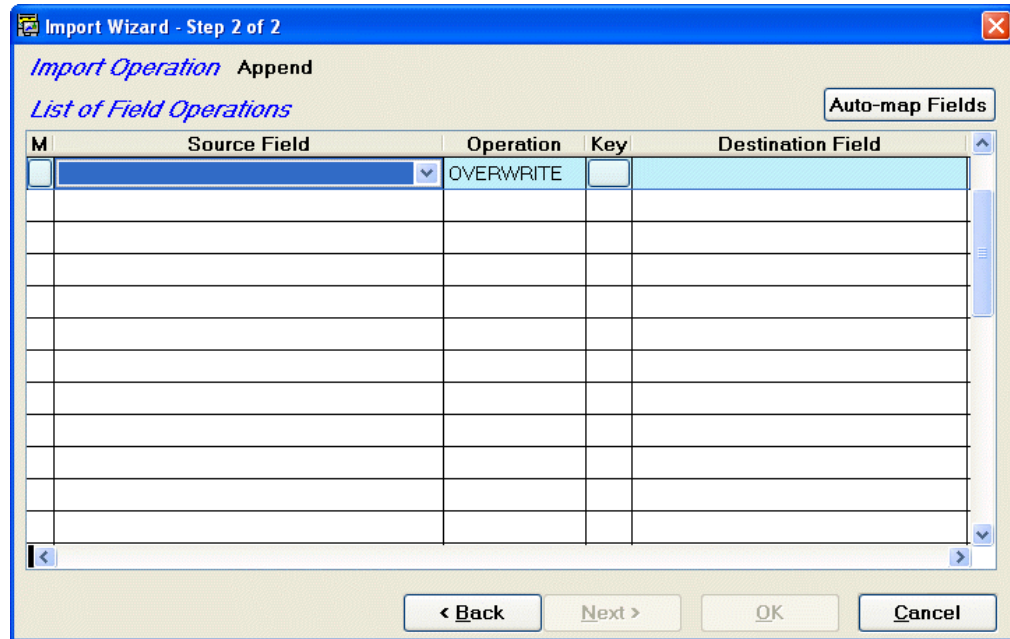
Step 2 is where you match up the source fields in the import data file with the destination fields in your file cabinet database. The mappings will be set up in the **List of Field Operations**.

8. You may click the **Auto-map Fields** button to allow the system to automatically match fields with the same names. The names must be an exact match in both the source and destination field (i.e. Source Field: **First Name**, Destination Field: **Child: First Name**).

9. To map a field from the import data file to a field in the database:

   a. Select a **Source Field**. These are the fields that appear in the import data file.

   b. Select an **Operation**:

Operation	Description
OVERWRITE	The data from the source field will replace the data in the destination field, if any.
APPEND	The data from the source field will be added onto the end of the data in the destination field, if any. *Example:* *This is useful when it is necessary to concatenate first name and last name into a single name field.*

   c. If desired, check the button in the **Key** column to specify that this is a *key field*. Key fields are used to match records (for example, to create one family for multiple children you could specify the home phone # as a key). Each key must be unique.

   d. Select a **Destination Field**. These are the fields in your file cabinet database. The data from the **Source Field** will be written into this field.

    e. Press the **TAB** or **ENTER** key to enter additional sets of source and destination fields.

10. To copy a mapping:

    a. Check the **M** column for the mapping you want to copy. This will mark the column.

    b. Click the 🔲 button from the main toolbar to copy the mapping.

    c. Move the cursor to the empty line at the bottom of the list.

    d. Click the 🔲 button from the main toolbar to paste the mapping.

11. To cut and paste a mapping:

    a. Check the **M** column for the mapping you want to copy. This will mark the column.

    b. Click the 🔲 button from the main toolbar to cut the mapping.

    c. Move the cursor to the empty line at the bottom of the list.

    d. Click the 🔲 button from the main toolbar to paste the mapping. You can also use this feature to cut and paste field mappings from one import definition to another.

12. To delete a mapping, simply cut it with the 🔲 button from the main toolbar.

13. When you are finished defining mappings, click on the **OK** button to complete the import map definition. Your import map will be listed in the Library of Saved Imports.

Notes on Creating Import Definitions

Parent/Child Fields

In order to link multiple children to one family, you must identify a key such as home phone number. If you choose to have one family record for each child record, do NOT mark a family key field.

A/R Transaction Fields

The following (source) fields are required fields for A/R transaction importing (required Key fields as marked):

- Category (Marked as Key)—cannot be longer than 25 characters
- Family ID (Marked as Key field and linked to a character type Family field)
- Date (May be used as a Key field to prevent duplicate records)
- Amount(May be used as a Key field to prevent duplicate records)

You can also include any of the following fields:

- Comment
- Child Name

> **Note:** When an imported record includes an A/R category that does not currently exist, that category is added to the cabinet.

> **Warning!** Category entries can be no longer than 25 characters long. If they are longer they will cause duplicate categories to be created.

Importing Ledger Transactions from Click-to-Pay

When importing ledger transactions from Click-to-Pay, in Step 1, you must set **Topic** to **Ledger Transactions**.

Importing Account Information for EZ-EFT

When importing account information, in Step 1, you must set **Topic** to **Family** or **Ledger Transactions**.
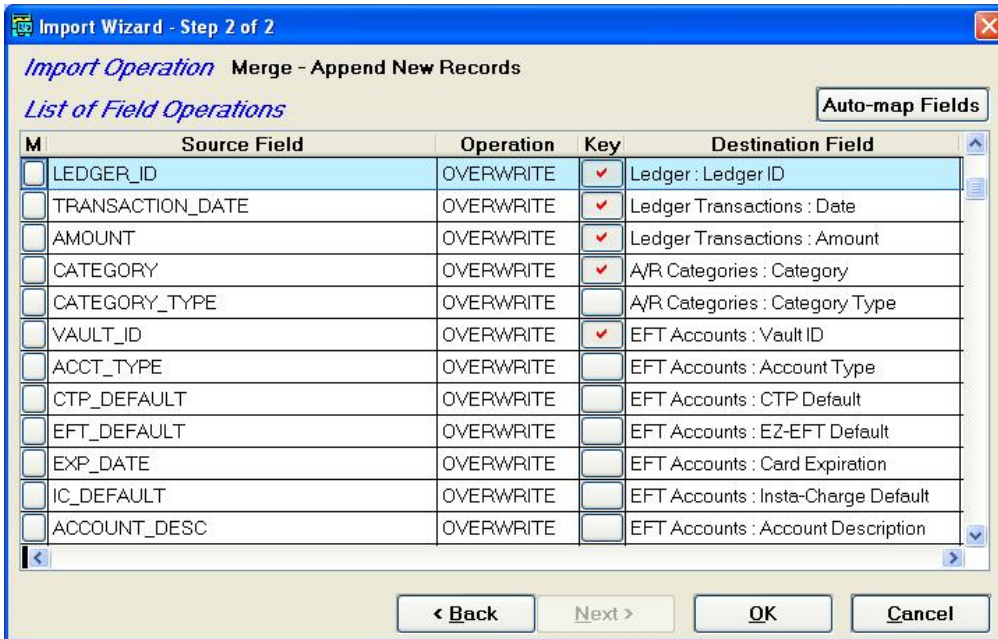
Copying an Import Map

You can often save time when creating a new import map by making a copy of a similar map and then editing it, instead of creating a new map from scratch.

To create a copy of an import map

1. Open the **Office Administration**, double-click **Chapter 2 (Cabinets & Drawers)**, and double-click **Import Data**. The Library of Saved Imports opens:

2. Select the **Import Name** for the import map that you want to copy.

3. Click the **Duplicate** button. The Import Wizard will open, and all of the settings for the original import map will be selected. By default, the **Name** of the new import map will be **Copy of [original name]**.

4. Make any changes needed, then click the **OK** button to save the copy of the import map.

Editing an Import Map

To edit an import map

1. Open the **Office Administration**, double-click **Chapter 2 (Cabinets & Drawers)**, and double-click **Import Data**. The Library of Saved Imports opens.

2. Select the **Import Name** for the import map that you want to edit.

3. Click the **Edit** button. The Import Wizard will open, and all of the settings for the import map will be selected.

4. Make any changes needed, then click the **OK** button to save the changes.
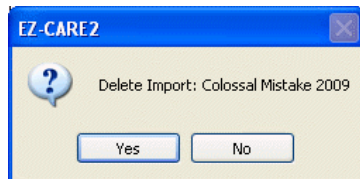
Deleting an Import Map

To delete an import map

1. Open the **Office Administration**, double-click **Chapter 2 (Cabinets & Drawers)**, and double-click **Import Data**. The Library of Saved Imports opens.

2. Select the **Import Name** for the import map that you want to delete.

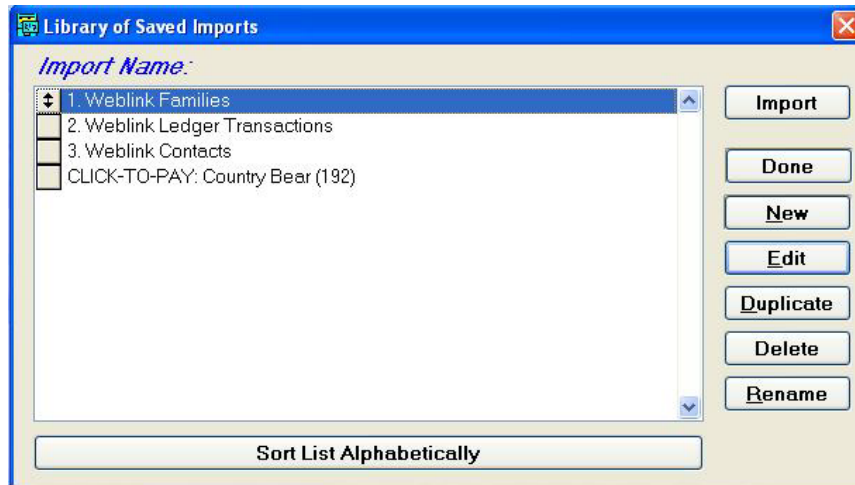3. Click the **Delete** button. A confirmation screen appears:

4. Click the **Yes** button to delete the import map, or click **No** to cancel deletion.

Importing Data

► **To run an import that has already been defined**

1. Open the **Office Administration**, double-click **Chapter 2 (Cabinets & Drawers)**, and double-click **Import Data**. The Library of Saved Imports opens:

2. Select the **Import Name** for the import that you want to run.

3. Click the **Import** button. A progress bar indicates the progress of the import process:
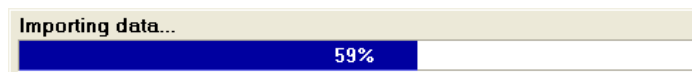
When the import process is finished, a message box will display the results of the import:

Running an Auto-Import from an .EZ2 File

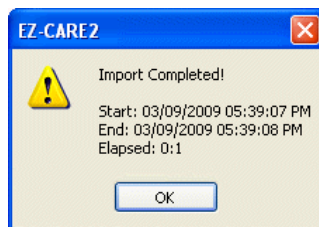During installation, EZ-CARE2 sets up a file association in your operation system with the file extension **.EZ2**. Files with this extension can be used to specify one or more import operations that the system can carry out.

If EZ-CARE2 is not running, and you double-click on an **.EZ2** file, the system will automatically start up and run the EZ-Import operations specified in the **.EZ2** "auto-import" file.

This function is particularly useful for users of Click-to-Pay and/or WebLink, as both of these SofterWare products will output the **.EZ2** file for you, allowing you to easily import transaction data and/or family and child information.

> **Note:** EZ2-Import maintains overall system security; if the user's system requires a password in order to get into EZ-CARE2, opening an auto-import file will also require a password to be entered in order for the import to continue.

Creating a .EZ2 File for Automatic Import

An **.EZ2** auto-import file is a text file that has the following specifications:

- It has no spaces in its file name, and the file extension **.EZ2**. Example names for this file are **REGFILE.EZ2** or **CenterRegistration.EZ2**.

- Each import operation is specified on a separate line entry.

- Each line entry follows the following format:

  `EZR: [Import Process Name],[Import Data File Name and Path]`

  [*Import Process Name*] is the name of the import process as set up in EZ-Import. If the import process name does not match any of the processes set up in the system, you will be prompted to create a new process with that name at import time.

  [*Import Data File Name and Path*] is the name and location of the data file.

A sample data file might look like the following:

```
EZR: Weblink Registration,E:\WEBLINK\INFOSNAP\PMC.CSV
EZR: Ledger Charges,E:\WEBLINK\INFOSNAP\PMC.CSV
```

► **To create an Auto-Import file**

1. Start Windows Explorer and browse to the EZ-CARE2 application folder (ex: C:\Softer\ezcare2 (or the application folder on the server if you are running EZ-CARE2 in a network environment).

2. From the file menu choose **New** then **Text document**.

3. Name the document **autoimport.ez2** (replacing the .txt extension). You may need to turn off the folder option to hide extensions for known file types in order to change the extension.

4. Typically, the import commands are added to the file by running the **.ez2** file and using the **Add Import Command** feature (see page 20). You can also edit the **.ez2** file manually using Notepad.
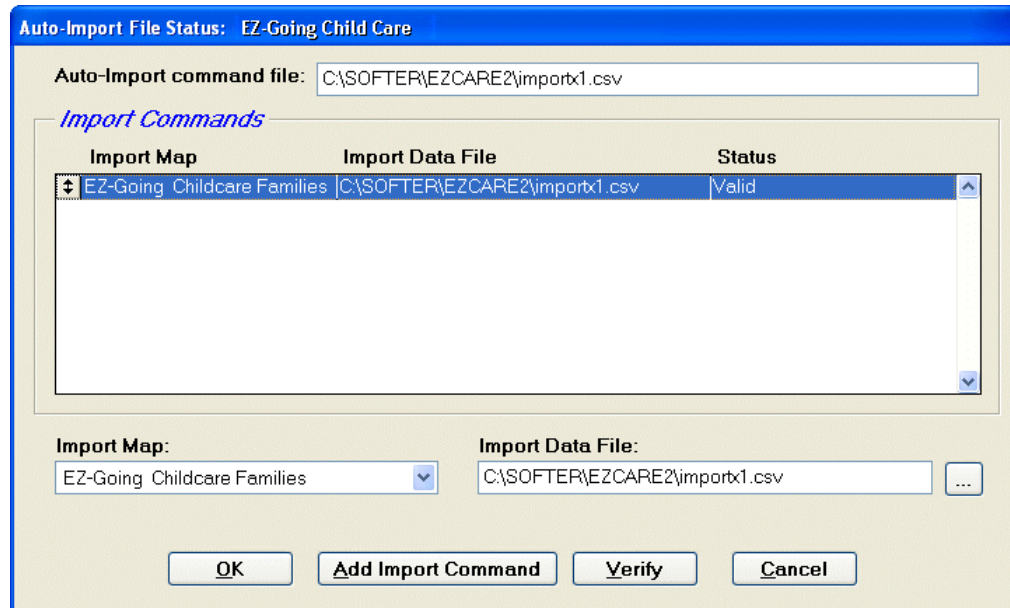
Running an Automatic Import

⚠️	**Important!**	In order to operate properly, the .EZ2 file must be saved to your EZ-CARE2 program folder (the folder that the program was installed into).

To run the automatic import

1. Close **EZ-CARE2**.

2. Open **Windows Explorer**, and double-click the **.EZ2** file. EZ-CARE2 will start up, and the Auto-Import File Status screen will appear:

The Auto-Import File Status screen displays the status of the **.EZ2** auto-import file. The file name is listed at the top of the screen under **Auto-Import command file**. Each line entry in the **.EZ2** file is listed under Import Commands, and the Status column indicates whether there are any problems with the line entry:

Status	Description
Valid	The import map and import data file are both valid, and they match each other. This import command is ready to be run.
Invalid Imp Map	The import map specified in the **.EZ2** auto-import file does not exist in the system. It may either be misspelled, or it may have been renamed or deleted. You can correct this by selecting a different import map (see "Changing the Import Map Specified in an Import Command" page 19).

Status	Description
Invalid File	The import data file specified in the **.EZ2** auto-import file does not exist.
Invalid File & Map	The import map was not found in the system, nor was import data file found.
Invalid Map/File Combination	The import map and data file were both found, but do not match each other. You may have specified the wrong import map or data file, or the data file may not be a proper **.CSV** file.

3. Perform one of the following actions.

    - Click the **OK** button to begin importing. EZ-CARE2 will perform all of the import commands that are listed as **Valid**, and then exit. The next time you open EZ-CARE2, you'll find your records updated with all the imported information.

    > **Note:** Import commands that are not listed as **Valid** will be ignored by the system and will not be carried out.

    - Change the import map specified in an import command (see below).

    - Change the import data file specified in an import command (see below)

    - Add a new import command to the **Import Commands** list (see "Adding a New Import Command" on page 20).

    - Verify that an import command is valid (See "Verifying an Import Command" on page 20).

    - Click the **Cancel** button to cancel the auto-import function and exit EZ-CARE2.

Changing the Import Map Specified in an Import Command

You can select a different import map for any of the import commands. Changes made in this screen will also be made to the **.EZ2** auto-import file.

To change the import map specified in an import command

1. Select the import command in the **Import Commands** list.

2. Select the desired import map from the **Import Map** list below.

3. Verify the import command (see "Verifying an Import Command" page 20).

Changing the Import Data File Specified in an Import Command

You can specify a different import data file for any of the import commands. Changes made in this screen will also be made to the **.EZ2** auto-import file.

To change the import data file specified in an import command

1. Select the import command in the **Import Commands** list.

2. Specify the file name and path of the new import data file in the **Import Data File** field, or click ⸱⸱⸱ to browse for the file.

3. Verify the import command (see "Verifying an Import Command" page 20).

Adding a New Import Command

You can add a new import command to the **Import Commands** list. This command will also be added to the **.EZ2** auto-import file.

To add a new import command

1. Click the **Add Import Command** button. A blank line will be added to the bottom of the **Import Commands** list:

2. Select the desired import map from the **Import Map** list below.

3. Specify the file name and path of the new import data file in the **Import Data File** field, or click ⸱⸱⸱ to browse for the file.

4. Verify the import command (see "Verifying an Import Command" below).

Verifying an Import Command

Once you have made a change to an import command, or added a new import command, you will need to verify that the command is valid before it can be run.

To verify an import command

1. Select the import command in the **Import Commands** list.

2. Click the **Verify** button. If the import map and import data file are both found, and if they match, the **Status** of the import command will be changed to **Valid**, and the command will be run when you click the **OK** button.