priority™

Data Migration Script

Clip Link: http://www.priority-software.com/eshbel.com/Movie_Search/Data_Migration_clip.htm
Note: Yellow highlights indicate action instructions.

*HEADINGS ARE NOT MEANT TO BE READ ALOUD.

BEFORE YOU BEGIN:

OBTAIN A SAMPLE LOAD FILE FOR LOADING PART DATA. TAB-DELIMITED IS THE EASIEST FORMAT TO DEMONSTRATE, SINCE IT CAN BE DISPLAYED "NEATLY" WITHIN EXCEL. IT SHOULD HOLD AT LEAST 5-10 PART RECORDS.

THE **LOAD FILE DEFINITIONS** FORM SHOULD BE SET UP ACCORDINGLY, AHEAD OF TIME.

LOAD THE FILE AND MAKE SURE THAT THERE ARE A FEW ERRORS DUE TO DATA FALLING UNDER THE WRONG COLUMN TITLE AND MISSING BASIC DATA (E.G. PART UNITS), WHICH WE WILL CORRECT WHEN RECORDING THE VIDEO. WRITE ADDITIONAL DETAILS ABOUT THESE ERRORS AND THEIR RESOLUTION IN THE PERTINENT SECTION OF THIS SCRIPT, ONCE WE HAVE THEM, TO ENSURE RECORDING GOES SMOOTHLY.

Introduction (00:00-01:47)

The purpose of this video is to help professionals with the task of data migration into *Priority*. When used correctly, our ready-made interfaces can save you a great deal of time and effort when loading your data into *Priority*. After watching this video, you are invited to view the data structures most commonly migrated, which are listed in the Appendix of the script that accompanies the video.

Before loading all of your data into *Priority*, it's a good idea to perform the process outlined in this video with a small sample of data, in order to learn the process and identify potential difficulties.

For this example, we're going to demonstrate how to load part records from your existing catalogue into the system, but the process is similar for other types of records, as well.

Most of the forms and programs you will need for this process can be found in the **Data Migration** menu[OPEN MENU: **System Management** > **Data Interface > Data Migration**]. The first thing you need to do is to make sure that all of the necessary basic data have been set up in the forms listed under the **Forms for Recording Data** menu[OPEN **Forms for Recording Data** SUB-MENU]. For instance, before loading part data, make sure you've set up the relevant part units, currencies and warehouses[HIGHLIGHT EACH FORM IN TURN]. Records for which the required data have not been defined in the system will not be loaded into the system.

Next, we'll locate and open the sub-menu that refers to the type of data we'll be loading; in this case, **Part Data Migration**[MENU PATH: **System Management > Database Interface > Data Migration > Inventory Data Migration > Part Data Migration**] When loading data into *Priority* for the first time, it is recommended to proceed according to the order of topics

displayed in this menu. Loading your data in the proper order ensures that each round of data is integrated smoothly with the data from previous rounds.

Stage I: Defining the File Structure for Migration (01:48-04:07)

Before you can begin data migration, you need to prepare the text file to be loaded. This can be a file generated by your previous system or a tab-delimited file such as you might generate in MS-Excel.[SHOW FILE IN EXCEL] The input file should consist of a single line for each record that you want to migrate[DEMONSTRATE] and the fields in this file[POINT OUT A FEW] must match the corresponding fields in *Priority*[OPEN **Part Catalogue,** SHOW CORRESPONDING FIELDS]. Make sure that the file includes all of the mandatory fields in the table to which you are migrating the data (e.g., **Part Number**). Each field can be assigned a fixed width, or separated from the next field by a tab[RETURN TO EXCEL, SAVE AS Text (tab delimited)].

Make a note of the position of each field in the file (for tab-delimited files) or its precise location within the record (for text files with columns of a fixed width). Once you have this information handy, you're ready to open the menu for the desired data (e.g., **Part Data Migration**)[UNDER THE **Inventory Data Migration** MENU] and define the parameters of the data file in the relevant **Load File Definitions** form.

The **Title** column lists all the fields that can be migrated to *Priority* for records of this type. Flag the **Inactive** column for any field that you do *not* want to load into the interim table.

Next, we need to fill in the **First Character** and **Last Character** of each field.

Since we are currently loading a file separated by tabs, we'll fill in the same number in both columns; in this case, they represent the relative position of the field within the record. However, if you wanted to load a file containing fields with a fixed width, you would use these values to indicate where each field begins and ends in the record.

If the field is a date, select the appropriate date format[HIGHLIGHT COLUMN].

When loading journal entries and accounts, you can also use the **Definition of Load Parameters** formSHOW IN MAIN MENU; UNDER **Financial Data Migration > Journal Entry Data Migration**] to define different load parameters for various data sources.

Stage II: Loading the File into the Interim Table (04:08-04:57)

We're now ready to load the data into an intermediary work area called the **interim table**, where it can be adjusted and errors can be corrected, before they are transferred to the actual system database. Run the **Load File into Interim Table** program in the relevant data migration sub-menu.

You will be prompted to specify the path to the data file. Click the folder icon in the **Load File** input screen to browse to the file you've prepared.

Once the program finishes running, you can proceed to check the data in the interim table.

Stage III: Checking Data in the Interim Table (04:58-10:28)

Run the **Check for Errors in Interim Tbl** report from the relevant data migration sub-menu.

This report displays various errors in the data loaded into the table, according to category.

Such errors are usually the result of missing mandatory data, data fields that fall under the wrong column titles or data inconsistent with the existing data in the system.

Any of these errors may involve valid data that are nonetheless the source of error. It is therefore advisable to enter the relevant interim table[E.G., FOR PART DATA, ENTER THE **Interim Table-Parts** FORM] and inspect the contents. A significant part of the problems that occur during data migration can be identified in this manner, through a good knowledge of the data and it's desired structure.

For instance, if you see that some of the data has fallen under the wrong column title[HIGHLIGHT AN EXAMPLE], close the interim table form and run the **Clear Interim Table** program in the relevant data migration sub-menu. This will delete all records from the interim table.

Next, you can either update the fields in the input file itself or change the settings in the relevant load file definitions form[E.G., FOR PART DATA, ENTER THE **Load File Definitions-Parts** FORM]. In this example, it should be sufficient to correct the relative positions of the relevant fields in the **First Character** and **Last Character** columns. Once you've corrected these errors, reload the input file.

Let's examine the data in the interim table again. If you notice any errors in the data that appear for a particular record, you can correct the values in question directly in the interim table. You can also use the interim table to delete any records that don't need to be loaded into the database.

Alternatively, you can run a variety of programs in the **Auxiliary Programs** sub-menu[OPEN SUB-MENU] to revise certain data automatically.

Some of these programs are common to all data types. For example, you may need to remove quotation marks (relevant mainly to files based on Excel) or delete any data that already exist in the system[HIGHLIGHT EACH PROGRAM IN TURN].

Other programs are specific to the type of data in question, for example: changing part units or fixing the value in Boolean fields such as Inventory Control[HIGHLIGHT EACH PROGRAM IN TURN].

You may also need to revise or add to your system data. For instance, the data we loaded in this example refer to several part units and part families that haven't been set up yet in the system[HIGHLIGHT RELEVANT SECTIONS IN ERRORS REPORT].

You can use the relevant form[OPEN **Part Units** FORM] in the **Forms for Recording Data** menu to record the missing part units[EXIT FORM]. You can record the missing part families manually, as well[POINT TO **Part Families** FORM]. Alternatively, you can run a program that adds any missing part families to the database automatically[RUN **Create Part Families from IntTbl** PROGRAM].

Depending on the type of data with which you're working, you may also be able to use the data in the interim table to populate *Priority* tables with permitted values for customer categories or part specs at this stage. In our example, we can use the data in the interim table to create Choose lists of part specs on the basis of the specs appearing in the interim table. To do so, let's run the **Set Permitted Values-Part Spec** program.

Once you've addressed all of the errors in the report, rerun the report to make sure that there are no longer any errors[RUN THE **Check for Errors in Interim Tbl** REPORT]. If the report still contains errors, you'll have to repeat the process we have just described until there are no errors.

Note that additional error checks will be run when the data are loaded into the system. Before you proceed to load the records from the interim table into the database, run the report provided in each sub-menu to check whether any of these records already exist in the system[E.G., **Parts Already in Database**]. If one or more records already exist, you can automatically remove them from the interim table before you proceed. To do so, let's run the **Delete Existing Parts from Table** program.

Should you choose not to remove these records from the interim table, the overlapping records will be overwritten with the records in the interim table when you load data into the system.

Stage IV: Loading Data into the System (10:29-11:08)

When you are ready to load data into the system database, run the **Load from InterimTbl to Database** program. When the program finishes running, it will report the number of lines that were successfully loaded into the various system forms[WAIT FOR MESSAGE]. A successful load results in the transfer of all data from the interim table to the system, accompanied by an empty errors report.

Stage V: Troubleshooting Problems Encountered During the System Load (11:09-13:55)

In most interim tables, an error in one of the records prevents it from being loaded; in other tables – those that load data into multiple system forms – a record may be partially loaded (i.e., some its data is transferred). For this reason, we've gone back and made a few changes to the data in the interim table and then rerun the load program, and are now going to demonstrate how to locate and handle any errors encountered during the system load. These errors are listed in the **Load Errors** report that was created automatically after the load. This report can also be run manually from the appropriate sub-menu.

To correct any lines that were not loaded into the database at all, we'll retrieve all records that are not flagged as loaded. In our example, since data from the **Parts** interim table is loaded into multiple forms, we'll use the Query Generator to retrieve all records that are not flagged in at least one of the load confirmation columns.

Since the **Loaded** column can also be flagged manually, it's a good idea to check the query results against the error report to make sure you haven't missed any problematic records. Next, we'll make the necessary corrections in each line.

And now we're ready to load the data. To load only those lines (or line data) that were not already loaded, run the **Load from InterimTbl to Database** program from the appropriate sub-menu, using the default **Unloaded Lines Only** option.

Alternatively, you have the option of reloading all data in the interim table (and overwriting any data that is already in the system). To do so, you would select the **Reload** option[POINT, THEN FINISH RUNNING THE PROGRAM].

==When the program finishes running, check the errors report again.== An empty report indicates that all of the data has been successfully loaded.

At this point it is recommended to remove all data from the interim table, in order to prevent the same data from being reloaded at some later time, when it is no longer up-to-date. To do so, ==run the **Clear Interim Table** program from the appropriate **Auxiliary Programs** sub-menu==.

This concludes our explanation of data migration into *Priority*.

Appendix

In most cases, we recommend that new customers load the following types of records from any external system they may have used previously:

- customers;

- vendors;

- GL accounts;

- parts;

- bills of materials; and

- journal entries from the current fiscal year.

Some customers may also wish to migrate data for one or more of the following types of records:

- customer price lists;

- customer parts;

- customer contacts;

- vendor price lists;

- vendor parts;

- vendor contacts;

- alternate parts;

- manufacturer parts; and

- child part designations.

Finally, you also have the option of migrating certain types of documents (e.g., open sales (or purchase) orders, GRVs and inventory counts), with the following provisos:

- Data can be loaded into the root (upper-level) form and the itemized sub-level form only.

- Any document and/or item remarks will not be loaded.

- When loading open sales or purchase orders, the remaining balance for each item will be loaded into the quantity column.

- In the event that basic data (e.g., customer, vendor or part numbers) have not yet been defined, documents will still be loaded, but the description column will be left blank. In such a case, it is the customer's responsibility to examine the data manually once the file has been loaded and to manually enter descriptions, if necessary.