



WIREDCONTACT

**Importing to WIRED Contact
From a Database File**

Reference Guide

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Preparing the Database table for Import

The WiredContact Enterprise – Import Utility works well with the following databases:

- * MS SQL Server
- * MS Excel
- * AS400 (IBM)
- * Oracle
- * Firebird (IBPhoenix)
- * MYSQL (DSN)
- * MS Access
- * MY SQL
- * AS400 (MS)
- * Oracle (MS)
- * ODBC (DSN)

Locating the Field Names for the Import

If you do not know the field names of the record(s) you are importing, you can look this information up. In this example the Contact Record will be loaded. The steps are:



1. Click on the Admin
2. Select Site Setting
3. Click on the WCE Table – In this example it would be the wce-contact
4. A listing of field names would be displayed

The Field Label is what will display on the screen and the Field Name is the name that should exist in the Comma Delimited File. If the file name on the list to be imported is exactly the same as the field in WiredContact then the field will usually align automatically.

Field Information for Table wce_contact:

Filters (contains): Field Name: Field Type: Field Usage:

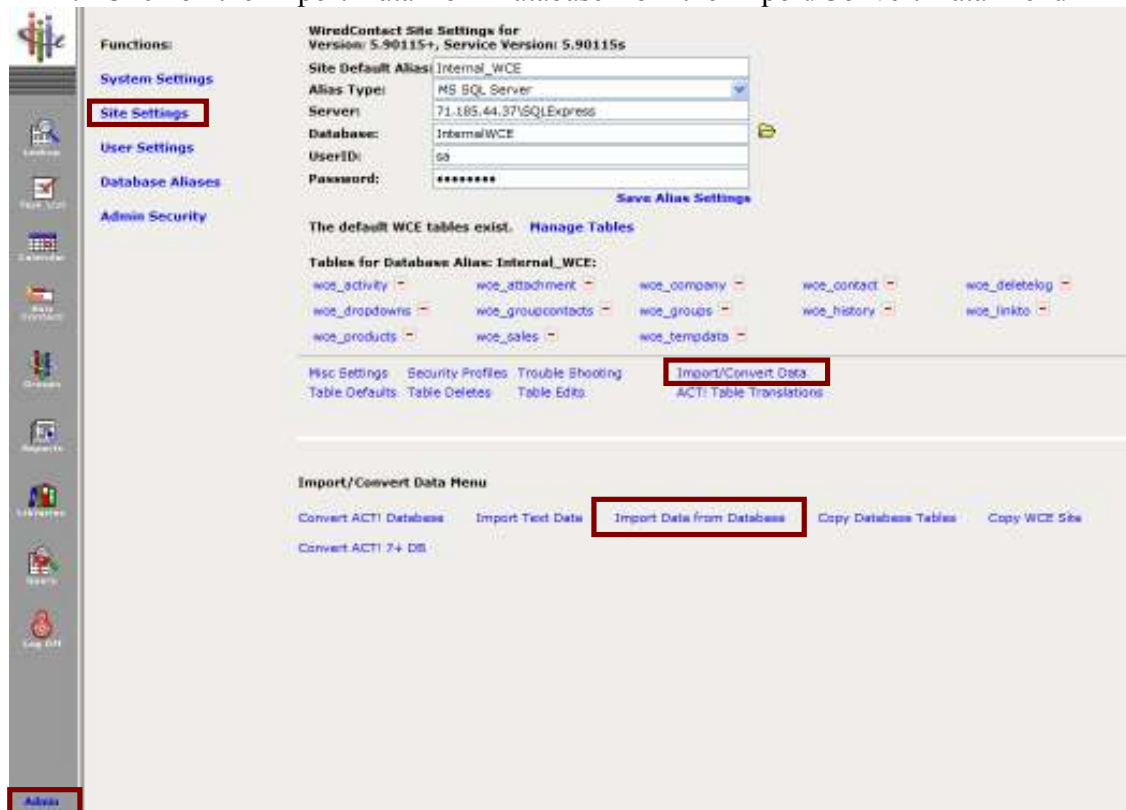
[Close Window](#) [New Field](#)

| | Field Name | Field Type | Max Length | Drop Down | Field Label | Field Usage | Default Value | History | Primary | |
|----|------------------|--------------|------------|-----------|-------------------|-------------|---------------|--------------------------|-------------------------------------|---|
| 1 | Address1 | Text | 50 | None | Address | Text | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | - |
| 2 | Address2 | Text | 30 | None | Address 2 | Text | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | - |
| 3 | Address3 | Text | 30 | None | Address 3 | Text | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | - |
| 4 | Affiliations | Text | 50 | Standard | Affiliations | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 5 | Agent | Text | 50 | None | Agent | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 6 | AltPhone | Text | 42 | None | Alt Phone | Phone | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 7 | AltPhoneExt | Text | 8 | None | Alt Phone Ext. | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 8 | Assistant | Text | 50 | None | Assistant | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 9 | Association | Text | 50 | None | Association | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 10 | AsstPhone | Text | 42 | None | Asst. Phone | Phone | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 11 | AsstPhoneExt | Text | 8 | None | Asst. Phone Ext. | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 12 | AsstTitle | Text | 50 | Standard | Asst. Title | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 13 | Branch | Text | 50 | Standard | Branch | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 14 | Broker | Text | 50 | None | Broker | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 15 | Business_Type | Text | 20 | Standard | Business Type | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 16 | Carrier | Text | 50 | None | Carrier | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 17 | City | Text | 30 | Standard | City | Text | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | - |
| 18 | Client_Billing | Text | 25 | Standard | Client Billing | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 19 | Client_Type | Text | 25 | Standard | Client Type | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 20 | Company | Text | 50 | None | Company | Text | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | - |
| 21 | Connection_ | Text | 50 | Standard | Connection | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 22 | ConstructionType | Text | 75 | Standard | Construction Type | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 23 | ConsultingHrs | Text | 25 | None | Consulting Hrs | Text | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 24 | Contact | Text | 50 | None | Contact | Name | | <input type="checkbox"/> | <input type="checkbox"/> | - |
| 25 | ContactType | Long Integer | | None | Contact Type | Numeric | | <input type="checkbox"/> | <input type="checkbox"/> | - |

NOTE: You also have the ability to map this information during the import process.

Importing the File to WIREDCONTACT

- Once the Database of your choice has the data ready to be loaded into the WiredContact you are ready to proceed to the ADMIN area to import the data.
1. Click on the ADMIN link on the bottom on the sidebar
 2. Select the Site Settings
 3. Select the Import/Convert Data
 4. Click on the Import Data from Database from the Import/Convert Data Menu



After selecting the Import Data from Database option the following screen will appear:

WiredContact Enterprise - Import Utility
Version: 5.90115+, Service Version: 5.90115s
Next

1. Import Map: (optional)

2. Default Record Manager: (Required)

3. Data Description:
(Required)

Alias Name:

Alias Type:

Server:

Database:

UserID:

Password:

Database Status: Database not configured

[Hide](#)

4. User Map Data (Optional): [Show](#)

5. Default Country Code:

Do not update Duplicate Records:

Do not import New Records:

Do not update fields if fields have data:

Allow single import row to update multiple database records

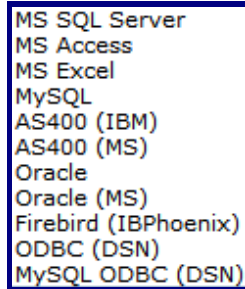
6. Primary table Entity

Additional table (optional)

Additional table (optional)

1. **Import Map** – If you have created a import map, you can select the map from the dropdown menu. If you selected an Import Map, the next step is to press the **NEXT** button. The import map will populate all the fields. If you do not have an import map saved, leave this field blank and continue to populate the fields below.
2. **Default Record Manager** – Choose a default record manager from the dropdown list for the import. This record manager will be used for the import, unless you specify another record manager for the imported record.
3. **Data Description (REQUIRED)** – This information specifies the information regarding the database to be converted.
 - a. **Alias Name (optional)** – If an existing alias is already defined, enter it here and it will populate the rest of the database information.

- b. **Alias Type** – Select the database type, that you are using for the import. Use the dropdown menu to select the database.



- c. **Server** – This must be entered for all Databases, except MS ACCESS.
- d. **Database** – Enter the Database name which will be used during the import.
- e. **UserID** – If the database you are using has a required UserID for access to the database, than type that UserID here. If there is no required UserID for access to the database, leave this field blank.
- f. **Password** – If the database you are using has a required Password for access to the database, than type that Password here. If there is no required Password for access to the import database, leave this field blank.
- g. **Database Status** – This area shows the current configuration status of the database to be converted. This status will change as you progress through the import process. If there is an issue with the setup, look here to obtain the information to make the necessary corrections.
4. **User Map Data (Optional)** – Press the **SHOW** link to view the data entry areas for the User Map. This area enables the mapping of UserIDs from a data source to the values in WiredContact Enterprise. A user map can match the UniqueID from a user in the data import. The user map can be created in a simple Microsoft Access database that should contain the following information:
- A table name matching the WCE User Table (ie. wces_users)
 - A column with the username as it appears in WiredContact Enterprises.
 - A column with the Unique ID of the user from the database to be imported.

If the user map is not used, the default record manager will be used for all information being imported.

4. User Map Data (Optional):

Alias Name:

Alias Type: MS Access

Server: localhost

Database: WCE_Users

UserID: [as needed]

Password:

Database Status: [Hide](#)

5. **Default Country Code** – The default for the country code is +1 for the United States. Change the country code to match the default country code for the data that you are importing.
 - a. Do not update Duplicate Records – Check if applicable
 - b. Do not import New Records – Check if applicable.
 - c. Do not update fields if fields have data – Check if applicable.
 - d. Allow single import row to update multiple database records – Check if applicable.
6. **Primary Table** – The default option is wce_contact (the contact table), which is an entity table. Use the default option for importing contact records. If you are importing another table, the primary table should be the entity table of that data group (i.e. wce_groups for Group information). Use the dropdown menu to select the appropriate table from the listing.
 - a. Additional Table - Specify additional table used for the import here. Ensure that the type of the table is also specified in the field to the right. Both pieces of information can be selected from the dropdown tables.
 - b. Additional Table

6. Primary table

Additional table **(optional)**

Additional table **(optional)**

Once all the fields have been entered press the NEXT button. If there are any issues with the information entered look at the Database Status for messages.

The screen refreshes to include the SQL Open Command. The SQL command to select the information from the database to be imported.

WiredContact Enterprise - Import Utility
Version: 5.90115+, Service Version: 5.90115s Next

1. Import Map: (optional)

2. Default Record Manager: Gail Stevens (Required)

3. Data Description: (Required)

Alias Type: MS Access

Server:

Database: c:\inetpub\wirede\Temp f

UserID:

Password:

SQL Open Command:

```
select * from wce_contact
```

SQL Count: 3

Tables: MSysACEs MSysObjects MSysQueries MSysRelationships wce_contact Hide

4. User Map Data (Optional): [Show](#)

5. Default Country Code:

Do not update Duplicate Records:

Do not import New Records:

Do not update fields if fields have data:

Allow single import row to update multiple database records

6. Primary table:

Additional table: (optional)

Additional table: (optional)

| Import Field | Key | Database Field | Example Data | Example Data | Example Data |
|--------------|--------------------------|------------------------------|---------------------------|--------------------|-------------------|
| ID | <input type="checkbox"/> | <input type="text"/> | 1 | 2 | 3 |
| Company | <input type="checkbox"/> | Company <input type="text"/> | Adirondack Leasing Associ | All Around Lawns | Aussie Meats |
| Contact | <input type="checkbox"/> | Contact <input type="text"/> | Gerald G Oestreich | Clay Caperton | Laura Gardias |
| Address | <input type="checkbox"/> | Address <input type="text"/> | 7893 Walnut Avenue | 25 Chestnut Street | 644 Chapel Street |

After the SQL Command has been entered the SQL count will indicate the number of row to be imported into the WiredContact database.

Press the NEXT to enter another SQL command to update another database table. You can query as many or as few tables as necessary from the data source. When the **IMPORT** button appears (and you are satisfied with the SQL statements that you have written), press the **IMPORT** button to initiate the process.

Creating an Import Map

If you would like to create an import map for this import process, enter a name in the 1st Field – Import MAP, just before you press the IMPORT button. This will save the Import Map for future use. The import map saves all the field setups and queries so they do not need to be created each time.

Validate the Import

Once the import has been started you can sign onto the WiredContact and review the first couple of records updated to ensure that the import is processing as expected.

NOTE: There is no need to have users off the system during an import.
