

**Adaxa**



**How To Guide**

**Ad-hoc Data Importation**

**Adaxa**

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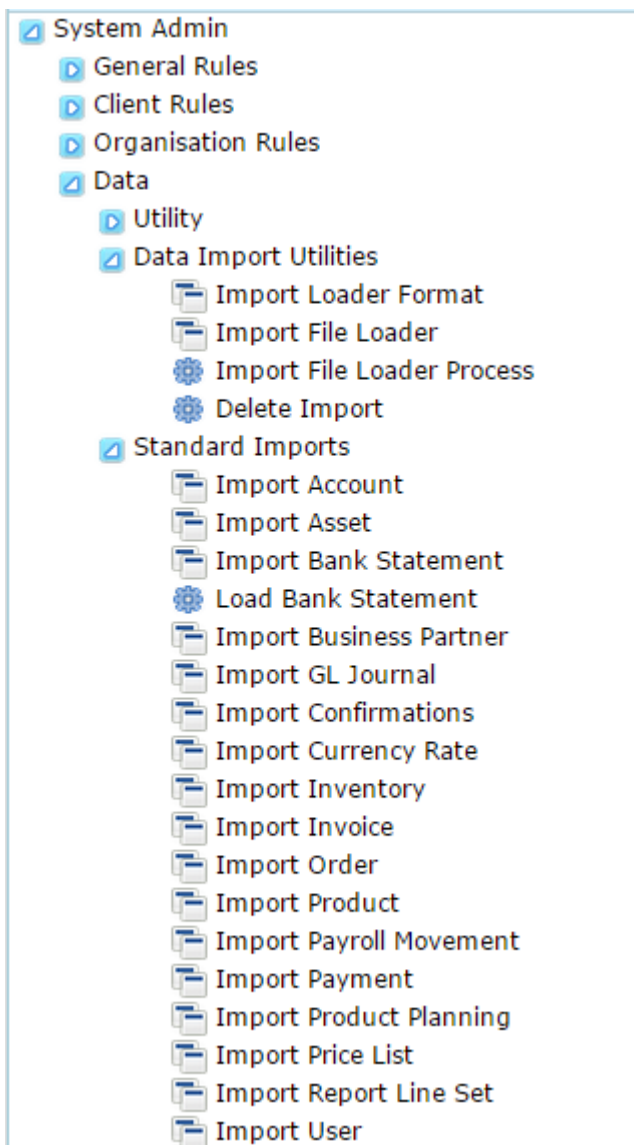
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## 1.1 ADempiere standard imports

ADempiere provides a number of importers as standard. These are visible in the menu as shown below:



The standard importers mainly deal with importing from flat files and updating multiple linked tables and enforcing the referential integrity constraints in the database.

## 1.2 ADempiere Ad-hoc Importers

The capability to import additional data into a single table has been added. See the last 3 items below in the red box.

- ☑ Data
  - ▶ Utility
    - ☑ Data Import Utilities
      - 📁 Import Loader Format
      - 📁 Import File Loader
      - ⚙️ Import File Loader Process
      - ⚙️ Delete Import
    - ☑ Standard Imports
      - 📁 Import Account
      - 📁 Import Asset
      - 📁 Import Bank Statement
      - ⚙️ Load Bank Statement
      - 📁 Import Business Partner
      - 📁 Import GL Journal
      - 📁 Import Confirmations
      - 📁 Import Currency Rate
      - 📁 Import Inventory
      - 📁 Import Invoice
      - 📁 Import Order
      - 📁 Import Product
      - 📁 Import Payroll Movement
      - 📁 Import Payment
      - 📁 Import Product Planning
      - 📁 Import Price List
      - 📁 Import Report Line Set
      - 📁 Import User
    - ☑ User Defined Import
      - ⚙️ Data Import Process
      - 📁 Import Inventory Count
      - 📁 Import Lead
      - 📁 Import MovementLine



The usage of the standard importers is covered in another Adaxa HowTo guide available from the Adaxa website.

This document details the usage of the additional importers and shows step-by-step the process to load data into ADempiere tables using Adaxa's generic data import functionality.



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## 2 Import Staging Tables

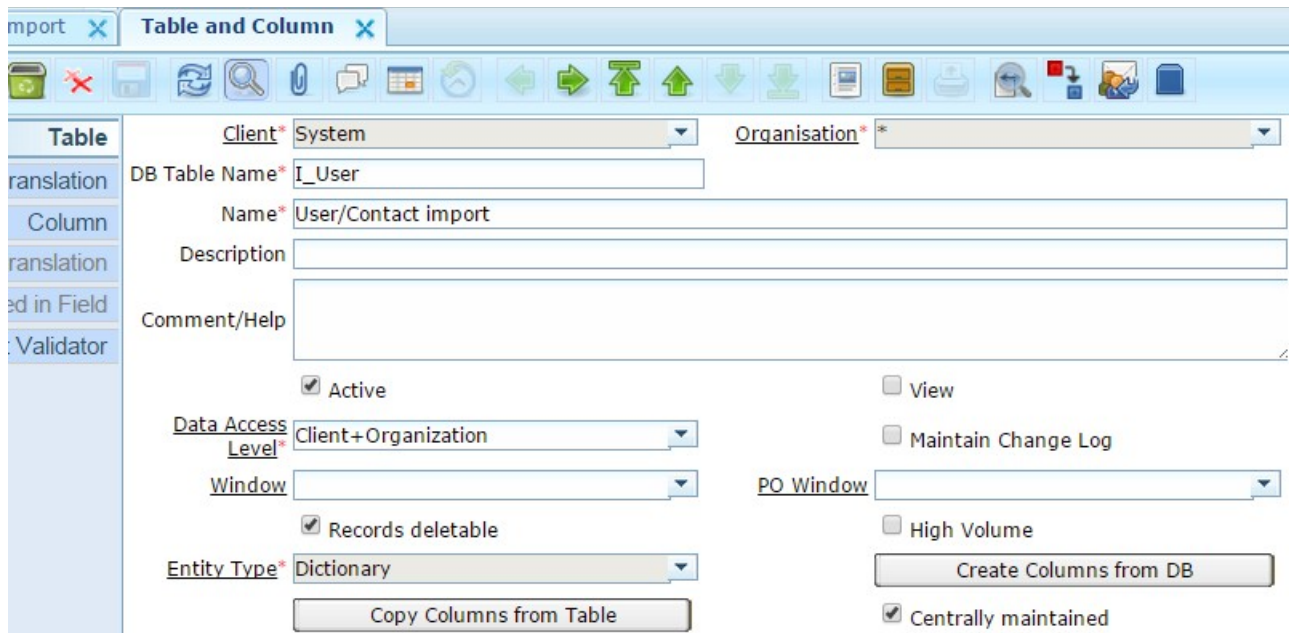
### 2.1 Import Staging Table Setup

To import data into Adempiere first create a staging table to capture the data from the external data source such as a spreadsheet saved as a CSV file.

While logged in as System Administrator, add a new Import Table if necessary or re-use an existing 'I\_<something>' table and add extra columns to it if necessary. Creating a new table or adding columns to an existing table can be done in the ADempiere Dictionary and exported to the database by clicking the . If you need a new table you will probably be able to copy from some existing table and just make changes and upload to the database by clicking the 'Synchronise Column' button.

### 2.2 Add/Extend an Import Staging Table

Refer to the screenshot below



The screenshot shows the 'Table and Column' configuration window in ADempiere. The window title is 'Table and Column'. The left sidebar has tabs for 'Table', 'Translation', 'Column', 'Translation', 'Field in Field', and 'Validator'. The main area contains the following fields and options:

- Client\***: System
- Organisation\***: \*
- DB Table Name\***: I\_User
- Name\***: User/Contact import
- Description**: (empty text box)
- Comment/Help**: (empty text box)
- Active
- View
- Data Access Level\***: Client+Organization
- Maintain Change Log
- Window**: (empty dropdown)
- PO Window**: (empty dropdown)
- Records deletable
- High Volume
- Entity Type\***: Dictionary
- 
- 
- Centrally maintained



## 2.3 Add Columns to Import Staging Table

Refer to the screenshot below

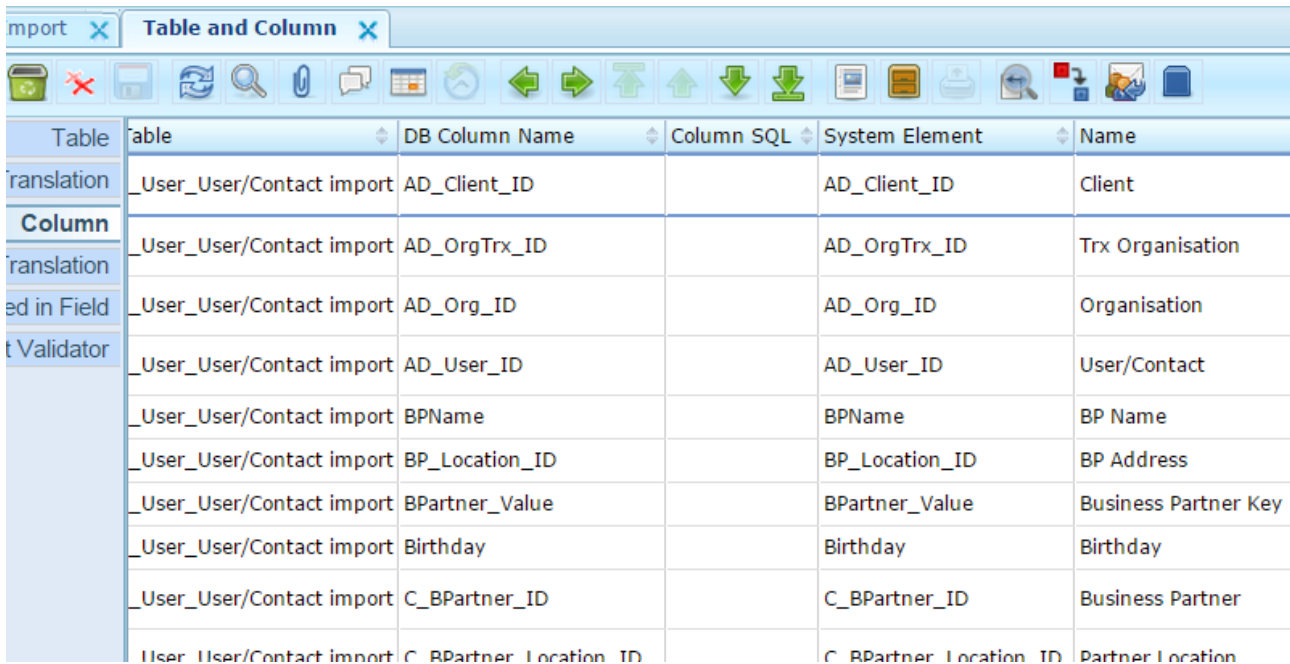


Table	DB Column Name	Column SQL	System Element	Name
_User_User/Contact import	AD_Client_ID		AD_Client_ID	Client
_User_User/Contact import	AD_OrgTrx_ID		AD_OrgTrx_ID	Trx Organisation
_User_User/Contact import	AD_Org_ID		AD_Org_ID	Organisation
_User_User/Contact import	AD_User_ID		AD_User_ID	User/Contact
_User_User/Contact import	BPName		BPName	BP Name
_User_User/Contact import	BP_Location_ID		BP_Location_ID	BP Address
_User_User/Contact import	BPartner_Value		BPartner_Value	Business Partner Key
_User_User/Contact import	Birthday		Birthday	Birthday
_User_User/Contact import	C_BPartner_ID		C_BPartner_ID	Business Partner
_User_User/Contact import	C_BPartner_Location_ID		C_BPartner_Location_ID	Partner Location

## 2.4 Create/Update Window

Create or Update the window needed to display the contents of the import staging table. To create a new window, add a new record in the 'Window Tab and Field' window and click the 'Create Fields' button on the window 'Tab' record.

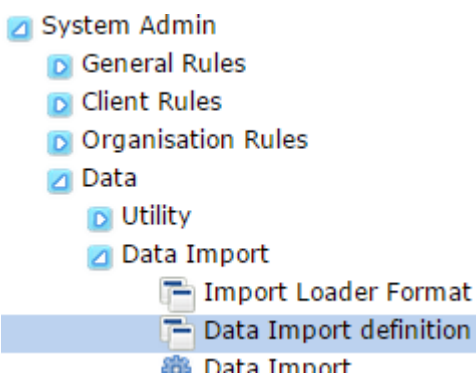
If it is an existing window and you have added columns to the database table then click the 'Create Fields' button on the window 'Tab' record to pick up the new fields. Reorganise the fields if desirable.



## 3 Data Import Definition

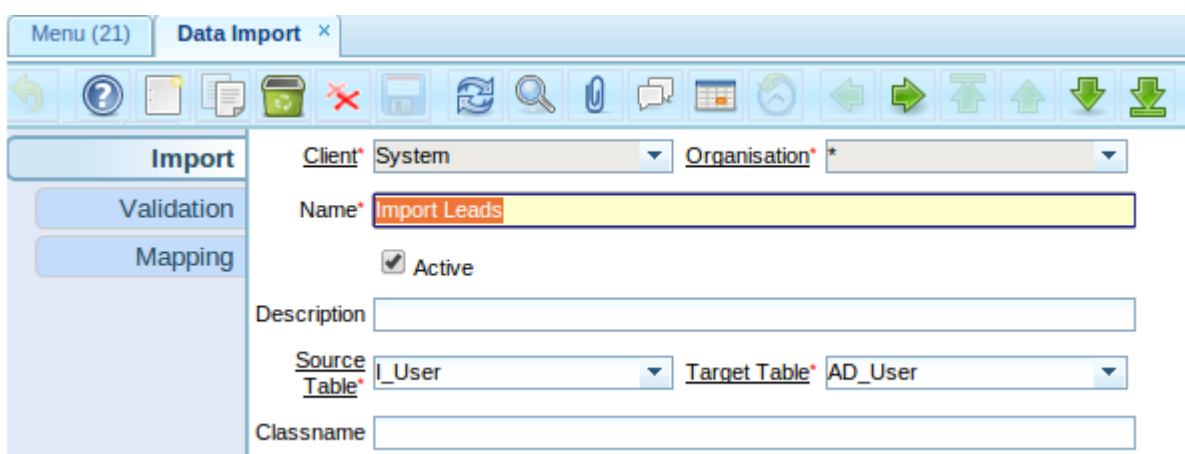
### 3.1 The Data Import Definition

The Data Import Definition defines the mapping between the temporary Import Staging Table and the final ADempiere table to be populated or updated.



(When a Data Import Definition has been defined it will later become visible in the dropdown in the Data Import process).

### 3.2 Specify the Source and Target Tables



Client*	System	Organisation*	
Name*	Import Leads		
Active	<input checked="" type="checkbox"/>		
Description			
Source Table*	_User	Target Table*	AD_User
Classname			





### 3.3 Define Validation rules

The screenshot shows the 'Data Import' configuration window with the 'Validation' tab selected. The configuration includes:

- Client:** System
- Organisation:** \*
- Data Import:** Import Leads
- Active:**
- Sequence:** 10
- Name:** Match existing contact
- Description:** (empty)
- SQLStatement:**

```
UPDATE I_User SET AD_User_ID = (SELECT u.AD_User_ID FROM AD_User u WHERE u.Value = I_User.Value)
```

### 3.4 Validation Error Definition

Note that the system will allow multiple Validation records in a single import definition and the Validation step can generate error messages.

Example 1

The screenshot shows the 'Validation Error Definition' configuration window with the following details:

- Client:** System
- Organisation:** \*
- Data Import:** Import inventory count update
- Active:**
- Sequence:** 10
- Name:** Error if no matching unprocessed inventoryline
- Description:** (empty)
- SQLStatement:**

```
UPDATE i_inventory i SET I_ErrorMsg='No updatable inventory line selected', I_IsImported='E'
WHERE M_InventoryLine_ID IS NULL
OR NOT EXISTS (SELECT * FROM M_InventoryLine il WHERE il.M_InventoryLine_ID=i.M_InventoryLine_ID AND il.Processed='N')
```



## Example 2


Client*	System	Organisation*	*
Data Import*	Import inventory count update		
	<input checked="" type="checkbox"/> Active		
Sequence*	20		
Name*	Check qty count supplied		
Description			
SQLStatement*	UPDATE I_Inventory SET I_IsImported = 'E', I_ErrorMsg = 'QtyCount Mandatory' WHERE QtyCount IS NULL		

## 3.5 Define Field Mapping

Import	Source Column	Target Column	Order by
Validation	AD_Client_ID	AD_Client_ID	<input type="checkbox"/>
Mapping	AD_Org_ID	AD_Org_ID	<input type="checkbox"/>
	BPName	BPName	<input type="checkbox"/>
	C_BPartner_ID	C_BPartner_ID	<input type="checkbox"/>
	C_Campaign_ID	C_Campaign_ID	<input type="checkbox"/>
	Comments	Comments	<input type="checkbox"/>
	Description	Description	<input type="checkbox"/>
	EMail	EMail	<input type="checkbox"/>
	Fax	Fax	<input type="checkbox"/>
	IsSalesLead	IsSalesLead	<input type="checkbox"/>
	LeadSource	LeadSource	<input type="checkbox"/>



An individual record shows the following:

<b>Import</b>	<u>Client</u> * System	<u>Organisation</u> * *
<b>Validation</b>	<u>Data Import</u> * Import Lead	
<b>Mapping</b>	<input checked="" type="checkbox"/> Active	
	Description	
	<u>Source Column</u> AD_Client_ID	<u>Target Column</u> * AD_Client_ID
	<input type="checkbox"/> Order by	Record Sort No 0 
	Default Logic	
	<input type="checkbox"/> Key column	



## 4 Import Loader Format

### 4.1 Standard Functionality

This section shows the usage of the standard ADempiere Import Loader Format functionality.

### 4.2 Create an Import Loader Format

This defines the column mapping from (say) a CSV file for importing into the Import Staging Table that you created. (this is standard ADempiere functionality)

### 4.3 Add Import Loader Format Record

The screenshot shows the ADempiere web interface for configuring an Import Loader Format. The window title is "Import Loader Format". The left sidebar contains "Import Format" and "Format Field". The main area contains the following fields:

- Client\***: SSW Group Holdings Pty Ltd
- Organisation\***: \*
- Name\***: SSW Import Lead
- Description**: (empty text box)
- Active**
- Table\***: \_User\_User/Contact import
- Format\***: Comma Separated
- Copy Lines**: (button)



## 4.4 Add the 'Format Fields'

Import Format	Active	Column	Data Ty
Format Field	<input checked="" type="checkbox"/>	Name_Name	String
	<input checked="" type="checkbox"/>	Description_Description	String
	<input checked="" type="checkbox"/>	Phone_Phone	String
	<input checked="" type="checkbox"/>	Phone2_2nd Phone	String
	<input checked="" type="checkbox"/>	EMail_Email Address	String
	<input checked="" type="checkbox"/>	LeadSource_Lead Source	String
Description	<input checked="" type="checkbox"/>	LeadSourceDescription_Lead Source Description	String
representative	<input checked="" type="checkbox"/>	SalesRep_Name_Sales Representative	String

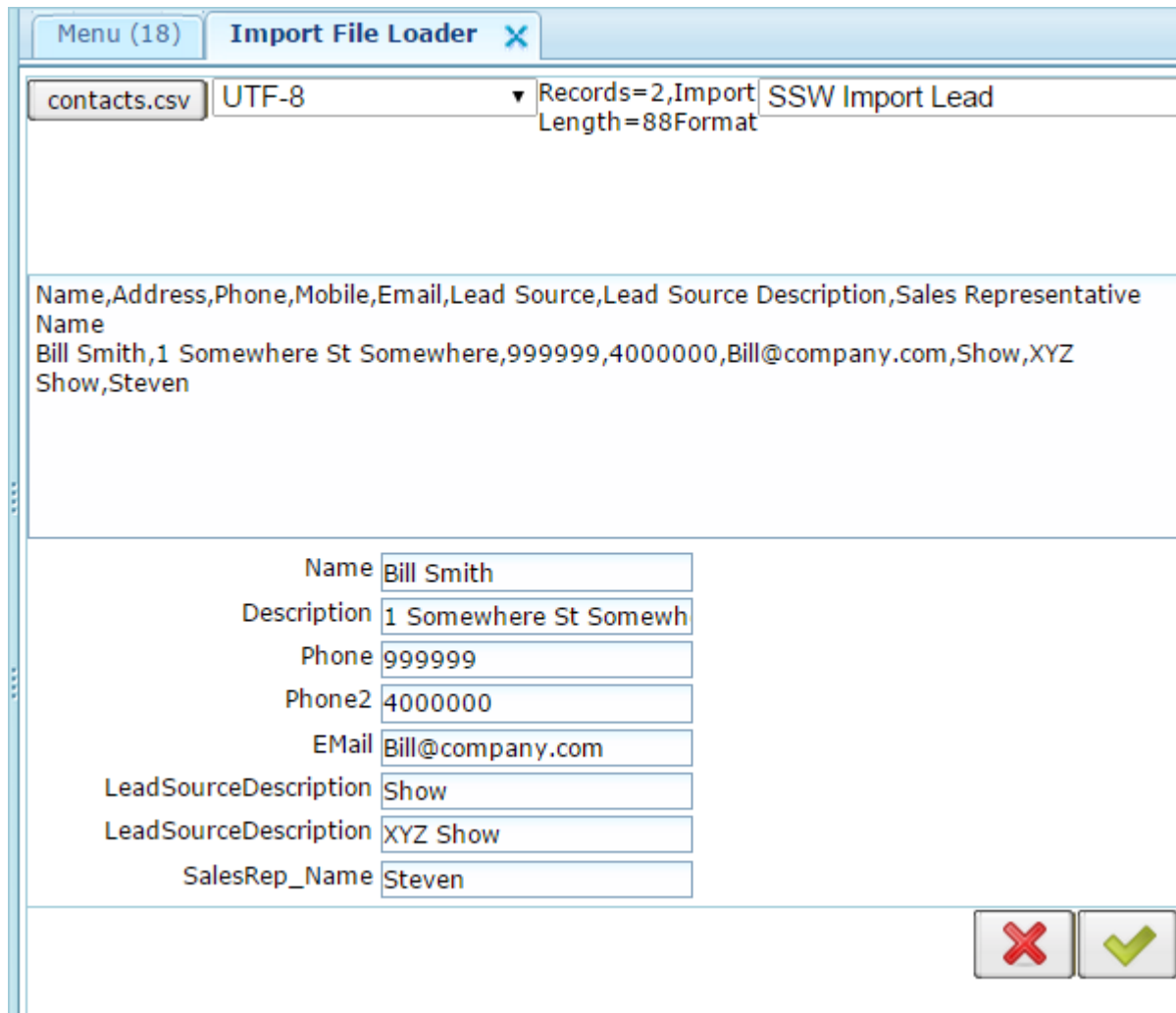
## 4.5 The Import File Loader

- System Admin
  - General Rules
  - Client Rules
  - Organisation Rules
  - Data
    - Utility
    - Data Import
      - Import Loader Format
      - Data Import definition
      - Data Import
      - Import File Loader
      - Import Account



Use the import File Loader to import data from (say) a CSV file into the import staging table you created.

This is the standard ADempiere process for moving data from from a file into an import staging table.



Menu (18) Import File Loader X

contacts.csv UTF-8 Records=2, Import Length=88Format SSW Import Lead

Name,Address,Phone,Mobile,Email,Lead Source,Lead Source Description,Sales Representative Name  
Bill Smith,1 Somewhere St Somewhere,999999,4000000,Bill@company.com,Show,XYZ  
Show,Steven

Name Bill Smith  
Description 1 Somewhere St Somewh  
Phone 999999  
Phone2 4000000  
EMail Bill@company.com  
LeadSourceDescription Show  
LeadSourceDescription XYZ Show  
SalesRep\_Name Steven

Cancel OK

(... end of standard ADempiere functionality)

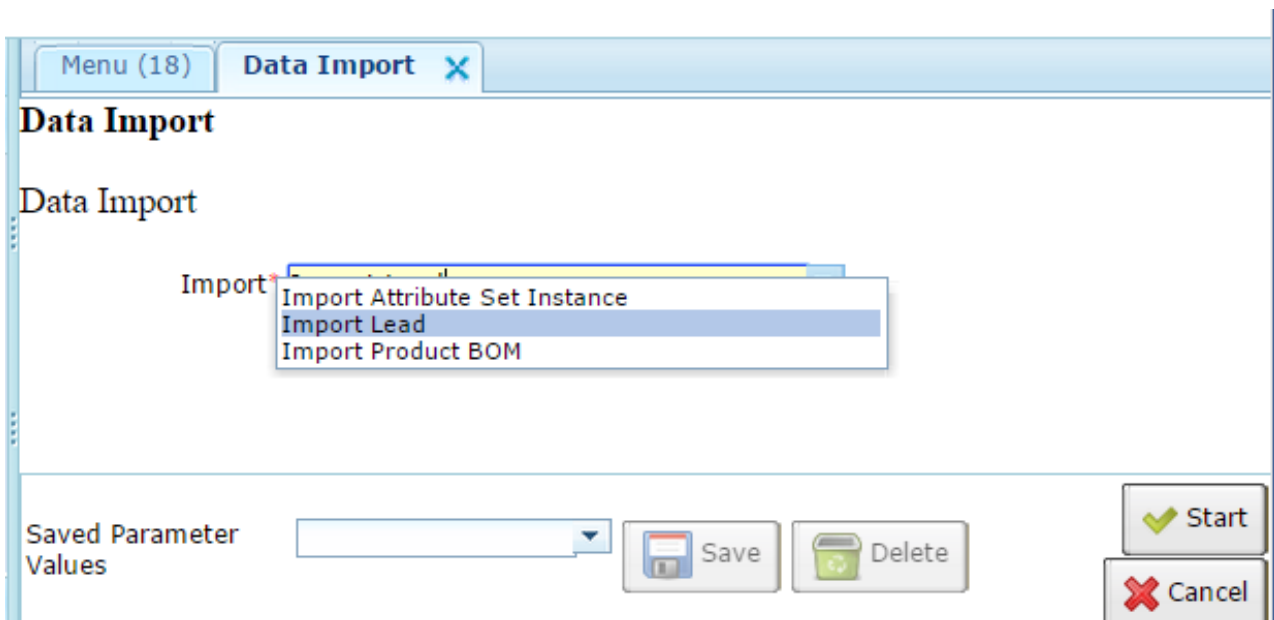


## 5 The Ad-hoc Data Importer

### 5.1 Ad-hoc Data Import Process

- ☑ System Admin
  - ▶ General Rules
  - ▶ Client Rules
  - ▶ Organisation Rules
  - ☑ Data
    - ▶ Utility
    - ☑ Data Import
      - 📁 Import Loader Format
      - 📁 Data Import definition
      - ⚙️ Data Import
      - 📁 Import File Loader

Run the **Data Import** process to populate the ADempiere table from import staging table.



## 5.2 Check the Data Import Table

Open the window that is linked to the staging table from which you trying to import and check the error message field for any problems. Ensure that the required fields have been selected to display in the window.





## DOCUMENT SUMMARY SHEET

<b>Client:</b>	
<b>Title of Document</b>	
<b>Summary:</b> <i>(Brief description of document)</i> <p>This document contains an overview of the ADempiere ERP &amp; CRM system for the sole purpose of enabling the target audience to gain an understanding of the functionality and architecture of ADempiere ERP &amp; CRM system. It is not warranted that this document is error free.</p>	
<b>Indexing Terms: (Keywords)</b>	
<b>Work Carried Out By: (Team initials or names)</b>	<b>ADAXA Reference:</b> n/a

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