

---

# *DataPorter*

# 6

The MAS 500 DataPorter module is used to load data into MAS 500 via Microsoft Excel, reducing conversion and implementation time, and facilitating the data entry process. DataPorter also allows you to export information from MAS 500 forms to Excel.

DataPorter allows you to bring setup data into the system during conversion and can also be used to load data on an ongoing basis.

Use DataPorter to move data between spreadsheets and MAS 500 forms. It is not used to update existing data.

## **In this chapter**

DataPorter Components .....	58
Using DataPorter to Import Data.....	65
Using DataPorter to Export Data.....	68
Supported fields .....	68
Customizations .....	69





# DataPorter Components

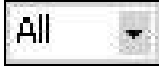
---

**Introduction** DataPorter components include the DataPorter toolbar and Excel spreadsheets.

**Toolbar** The DataPorter toolbar appears automatically in the spreadsheet when you open DataPorter, and can be dragged and docked anywhere on your desktop. Following is an example of a DataPorter toolbar and explanations of each toolbar component.



Option	Name	Function
	Exit	Closes DataPorter and Excel. You are prompted to save the Excel spreadsheet, if applicable.
	Map Controls	Formats the spreadsheet for data entry. For more information, see <i>Mapping the spreadsheet</i> on page 65.
	Import Data	Imports data from the Excel spreadsheet into MAS 500. For more information, see <i>Using DataPorter to Import Data</i> on page 65.
	Export Data	Exports the record currently displayed in MAS 500 into the Excel spreadsheet. For more information, see <i>Using DataPorter to Export Data</i> on page 68.

Option	Name	Function
	Filter Data	<p>Filters the information that appears on the spreadsheet. Filter options include:</p> <ul style="list-style-type: none"> <li>• All. Displays all rows on the Main and Detail worksheets</li> <li>• Imported. Displays only those rows that have been imported successfully (as indicated by an "X")</li> <li>• Non-Imported. Displays only those rows that have not been imported (which do not have an "X")</li> </ul>

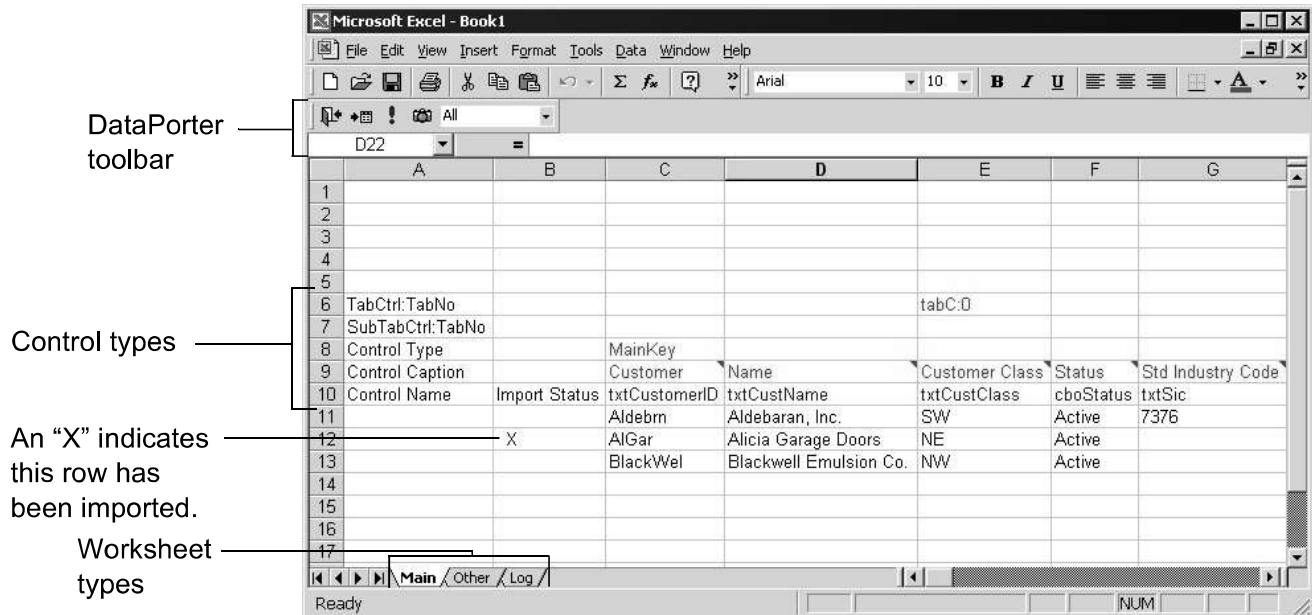
## Spreadsheets

When you open DataPorter, a blank spreadsheet appears. After you map the spreadsheet, it contains the elements necessary for DataPorter to import data into MAS 500. Open existing spreadsheets from the Excel File menu.

### Worksheet example

Following is an example of a mapped worksheet in which data has been entered for some fields.

## Chapter 6



### Control type definitions

The first column of a mapped spreadsheet contains control types, which are used to identify the format and data controls required for DataPorter to import the spreadsheet into MAS 500.

**Important:** Do not modify control types or the information that appears in the control type rows. Do not add rows above the control type rows.

This information is filled in automatically by the system and includes the following:

- **TabCtrl:TabNo.** Identifies the tab name and page number where the form control is located. Only used for forms that contain tabs.
- **SubTabCtrl:TabNo.** Identifies the tab name and page number of a subtab control (that is, a tab control contained within another tab control). Most line entry tasks are configured this way.

- **Control Type.** Identifies the attributes of the control. There are two control types:
  - ▶ **MainKey.** Identifies the form key.
  - ▶ **ButtonCommit.** Notifies DataPorter of an action required on the form. For example, clicking the OK button after you enter each line in the Detail section of a form.
- **Control Caption.** The field label that appears on the form. Provided for information only. If the cell is flagged with red comment indicators, place your pointer over the cell to display the first 250 characters of the online Help.
- **Control Name.** This is the control name on the form to which the data will be sent.

**Import status**

The second column of a mapped spreadsheet identifies the import status of the row. An “X” appears in the cell when the data for that row has been imported successfully. The cell is blank for data that has not been imported. DataPorter only attempts to import data into the system when the cell is blank.

**Worksheet types**

A mapped spreadsheet can contain the following types of worksheets:

- Main
- Detail
- Other
- Log

The first worksheet in the spreadsheet always determines the type of import that DataPorter will perform. The following table describes each worksheet type.

<b>Worksheet</b>	<b>Function</b>
Main	Contains information on the main (header) record. For example, in Maintain Vendors, the spreadsheet contains only a Main worksheet because this task does not have any associated detail data.
Detail	<p>Contains information on the detail records. This worksheet is usually associated with a Main worksheet. In this case, the Detail worksheet follows the Main worksheet and contains columns that associate the detail records to the main record on the Main worksheet.</p> <p>The Detail worksheet may exist without a Main worksheet. To do this, delete the Main worksheet and the key columns on the Detail worksheet that reference the Main worksheet. This removes any reference to the main record. All records in the Detail worksheet are then associated with the MAS 500 form that is selected at the time you launch DataPorter.</p>
Other	Contains controls that are not used to import data into MAS 500. User-customized and nonessential controls appear on this worksheet. To import these controls, you must manually move them to either the Main or Detail worksheet.

Worksheet	Function
-----------	----------

Log	Tracks information on the DataPorter import progress. Errors found by DataPorter are displayed in the Log worksheet. The number of successfully imported rows is also recorded. For more information, see <Table Italink>Log worksheet on page 67.
-----	--

### Worksheet combinations

Spreadsheets may include the following combinations of worksheet types:

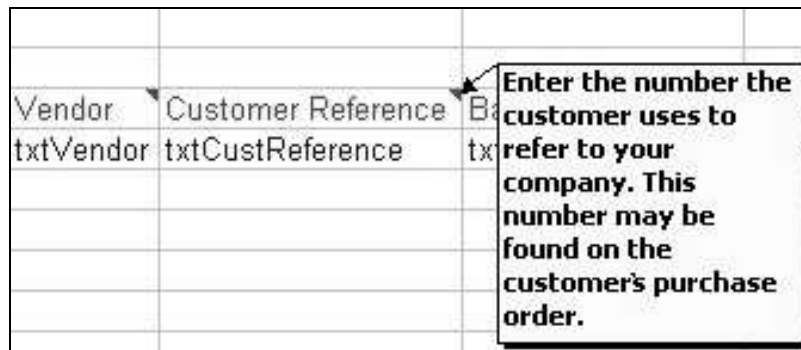
Combination	Function
-------------	----------

Main only	The associated MAS 500 task does not have detail.
Main, Detail	Used for MAS 500 tasks that have main and detail information. If both a Main and Detail worksheet exist, then the Detail rows must be in the same Main Key order as the Main rows. All Detail rows with the same Main Key must be contiguous. Each Main row must have at least one Detail row. If any of these conditions are not met, then processing will stop and an error will be logged.
Detail only	Used for MAS 500 tasks that have detail information and the main data is already selected.

Log worksheets are included on every mapped spreadsheet. Other worksheet types are included if the form contains user-defined fields or fields that are not required to perform the import.

## Help

Field-level Help is available by placing your pointer over any Control Caption cell that contains a red flagged comment indicator. To modify the Help for a particular spreadsheet or add your own comments, right-click in the cell and select Edit Comment from the menu that appears. You must save the spreadsheet to retain your changes.



When errors are encountered during an import, the cells in the row associated with the error are flagged with red comment indicators. Place your pointer over the cell to view the error comment.