

Importacular - Schedule Imports

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Introduction

With the optional Scheduled Imports module it is now possible to setup imports to run according to a schedule without any user interaction.

This document gives you an overview of setting up and running a scheduled import. It assumes that you have Importacular installed as a plug-in to The Raiser's Edge. You will use the plug-in to do the initial setup of the scheduled import.





Installation

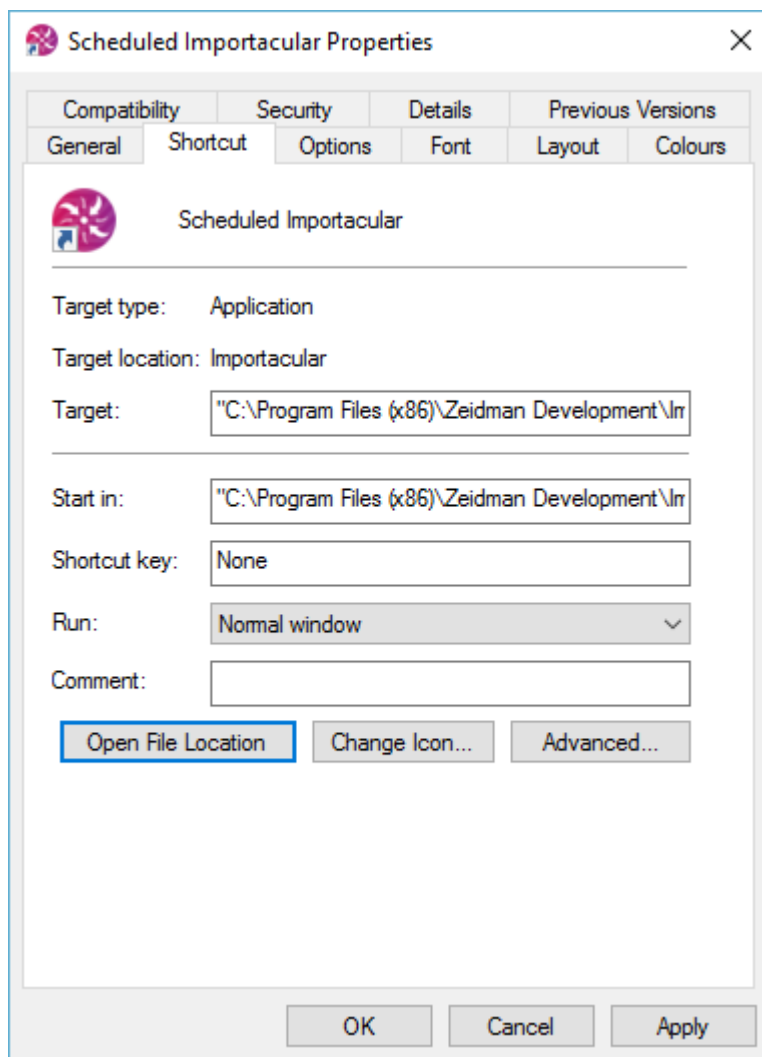
Insure that the regular Importacular plug-in has been installed on the machine that you wish to schedule imports.

Run the setup.exe file from the Importacular Scheduler folder of the downloaded zip file. This wizard will take you through the very basic steps of installing the application.

As part of the installation you will also need to tell Scheduled Importacular which Raiser's Edge user name and password to use as well as where to store the log file.

One Time Configuration File Setup

Right click on the Scheduled Importacular desktop icon and select properties.



Press the *Open File Location* button. With a text editor such as notepad edit the file *Scheduled Importacular.exe.config*. This XML file contains a number of different sections and you should be careful only to edit the file in the highlighted areas outlined below.

```
<applicationSettings>
  <ImportacularApp.My.MySettings>
    <setting name="REUsername" serializeAs="String">
      <value>Supervisor</value>
    </setting>
    <setting name="REPassword" serializeAs="String">
      <value>ADMIN</value>
    </setting>
    <setting name="REDBNum" serializeAs="String">
      <value>50</value>
    </setting>
    <setting name="VerboseLogging" serializeAs="String">
      <value>False</value>
    </setting>
    <setting name="LogPath" serializeAs="String">
      <value>D:\Projects\ZeidmanDevelopment\Importacular_dev\ImportacularApp\logging</value>
    </setting>
  </ImportacularApp.My.MySettings>
</applicationSettings>
</configuration>
```

- Update "Supervisor" to another Raiser's Edge user. It is recommended that a new user is created such as "Importacular Import" so that it is easily determined that data imported or updated came from this process.
- Update "ADMIN" to give the corresponding password for the user name given previously.
- Update "50" to the database number. This is normally "1" when using a production database but maybe higher. "50" refers to the Blackbaud Sample database. Otherwise the number can be ascertained by the order it appears in the login screen.
- Change the LogPath to a path that is valid for users of Importacular on the current machine.

Save the file. This will only need to be done once each time Scheduled Importacular is installed on a machine.

Setup



Each scheduled import needs to have all of the Importacular settings available to it when it is first started. It does this in the form of command line parameters. There are currently six parameters as follows:

Short form	Long form	Usage	Example	Required?
-d	-dataSourceId	The data source id	-d 13	Yes
-t	-templateId	The template id	-t 33	Yes
-s	-settings	The saved data source settings file	-s "D:\scheduled\import.xml"	Yes
-c	-control	The control report	-c "D:\scheduled\control.docx"	Yes
-a	-audit	Whether or not audit trail should save changes (if installed)	-a False	No
-v	-validatrix	Whether or not Validatrix should enforce rule validation (if installed)	-v True	No
-l	-location	The location of the data source files *	-l "D:\files\Importacular Data Sources\"	No



If you run the Scheduled Importacular application without any of the parameters then you will be shown the following screen which will help you set up the parameters in the way you want:

Scheduled Importacular Command Line Parameters

Use this form to set up the command line parameters

Data Source Id

Template Id

Data Source Settings

Control Report

Track changes in Audit Trail

Insure Validatrix rules are enforced

Use these command line parameters


OK

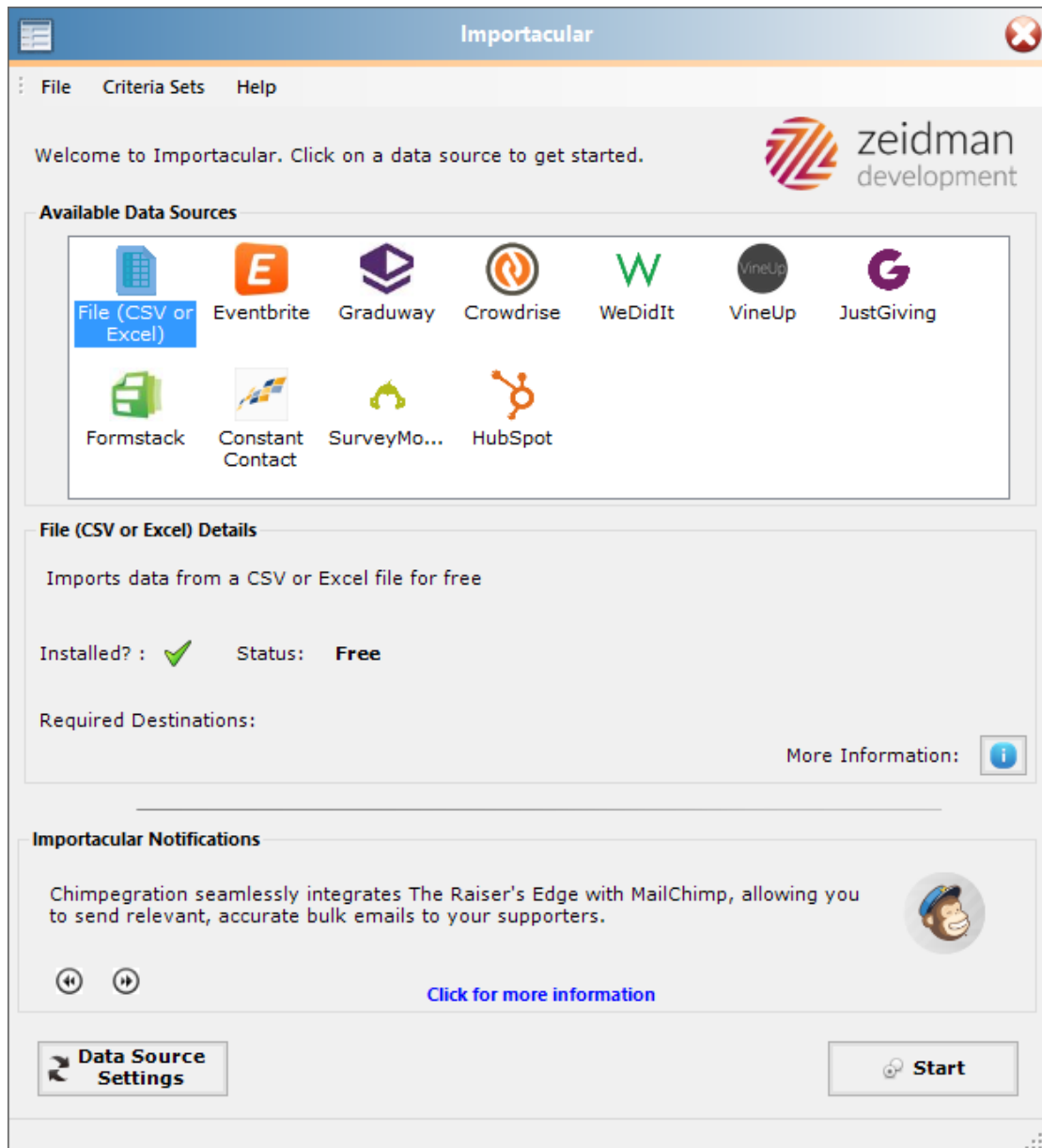
As you enter the values the command line parameters that should be used alongside the file name is generated.



Looking at the parameters and the help screen above it is not obvious where data source id, template id and data source settings come from. These need to be retrieved from Importacular as outlined below.



Locate Data Source Id

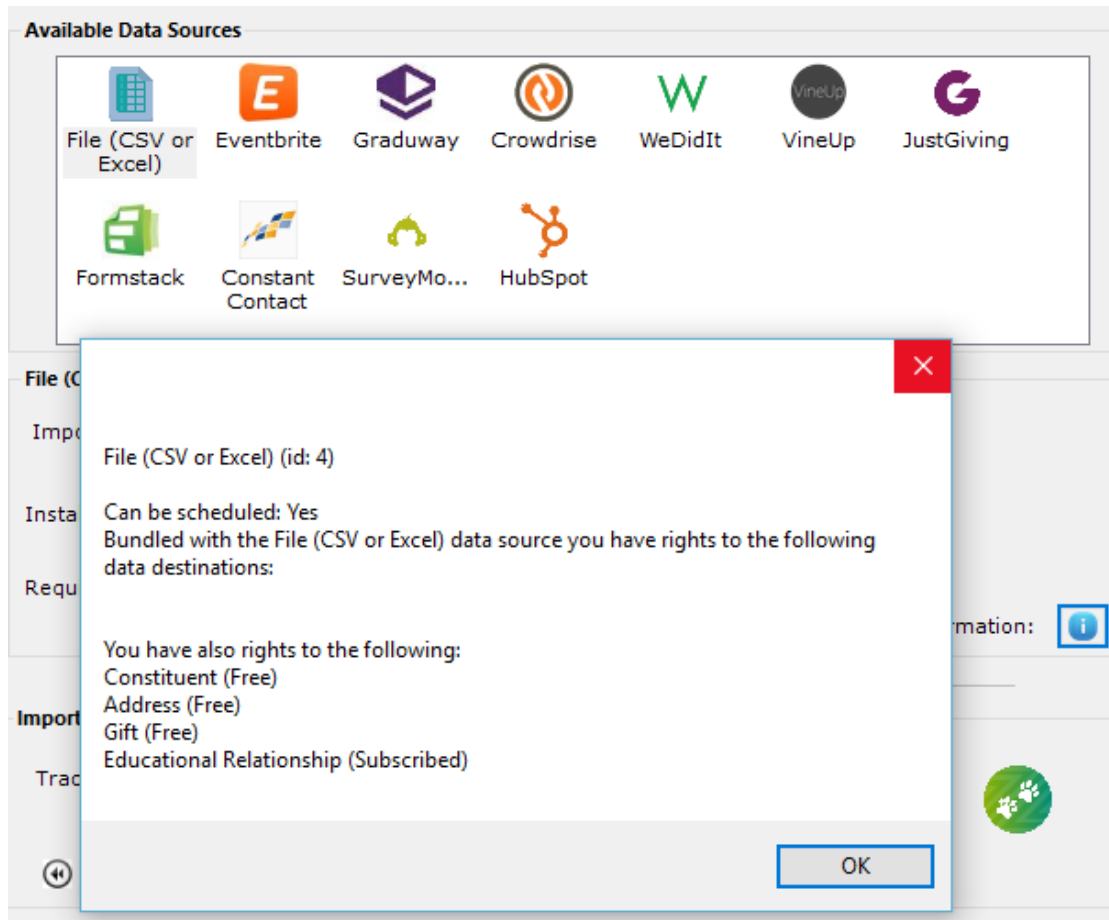
This can be found on the main home screen. Select the data source and press the blue  button



The screenshot shows the 'Importacular' application window. The title bar reads 'Importacular' with a close button. Below the title bar is a menu with 'File', 'Criteria Sets', and 'Help'. A welcome message says 'Welcome to Importacular. Click on a data source to get started.' The 'zeidman development' logo is in the top right. A section titled 'Available Data Sources' displays icons for 'File (CSV or Excel)', 'Eventbrite', 'Graduway', 'Crowdrise', 'WeDidIt', 'VineUp', 'JustGiving', 'Formstack', 'Constant Contact', 'SurveyMo...', and 'HubSpot'. The 'File (CSV or Excel)' source is selected. Below this, the 'File (CSV or Excel) Details' section shows: 'Imports data from a CSV or Excel file for free', 'Installed? : ', 'Status: **Free**', and 'Required Destinations:'. A 'More Information: ' link is present. The 'Importacular Notifications' section features a message about Chimpegration and a 'Click for more information' link. At the bottom, there are 'Data Source Settings' and 'Start' buttons.

This bring up the more information box which tells you if this particular data source can be scheduled and its id:

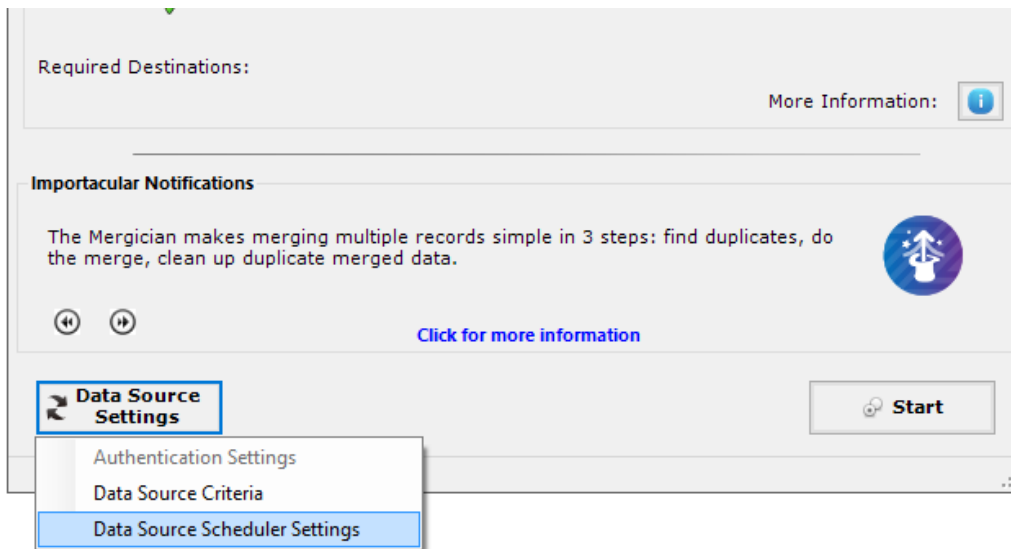




Generate Data Source Settings file.

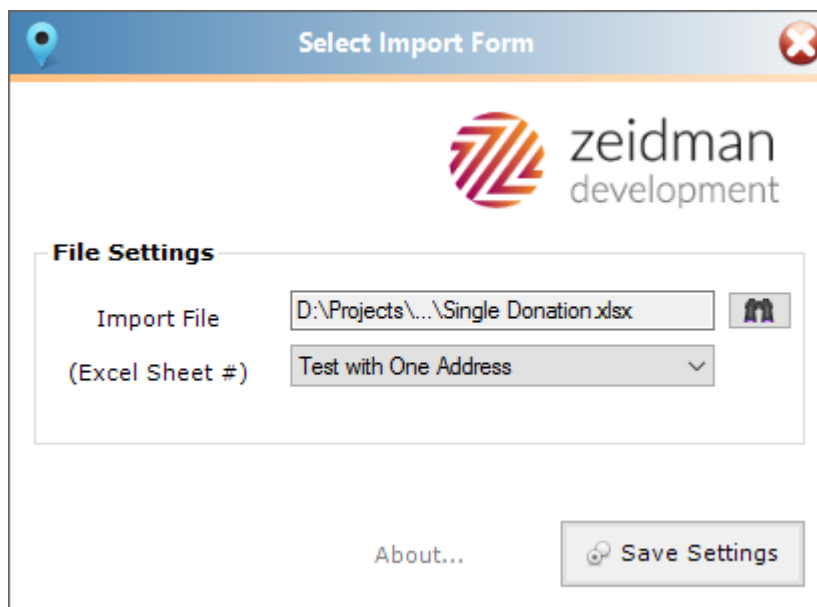
If the data source can be scheduled then you are also able to generate a data source settings file. Press the data source settings button as shown below. Note that the final option will only be enabled if the data source allows scheduling and if you have purchased the Scheduled Importacular module.





A screen similar to the data source's criteria screen will appear. Note that if there is any one time authentication to be completed for the data source, this will need to be done before the settings can be generated.

In the example below we show the file based data source but the screen will look very similar to screen you see when you use the data source within Importacular as a regular interactive import depending on the data source selected.

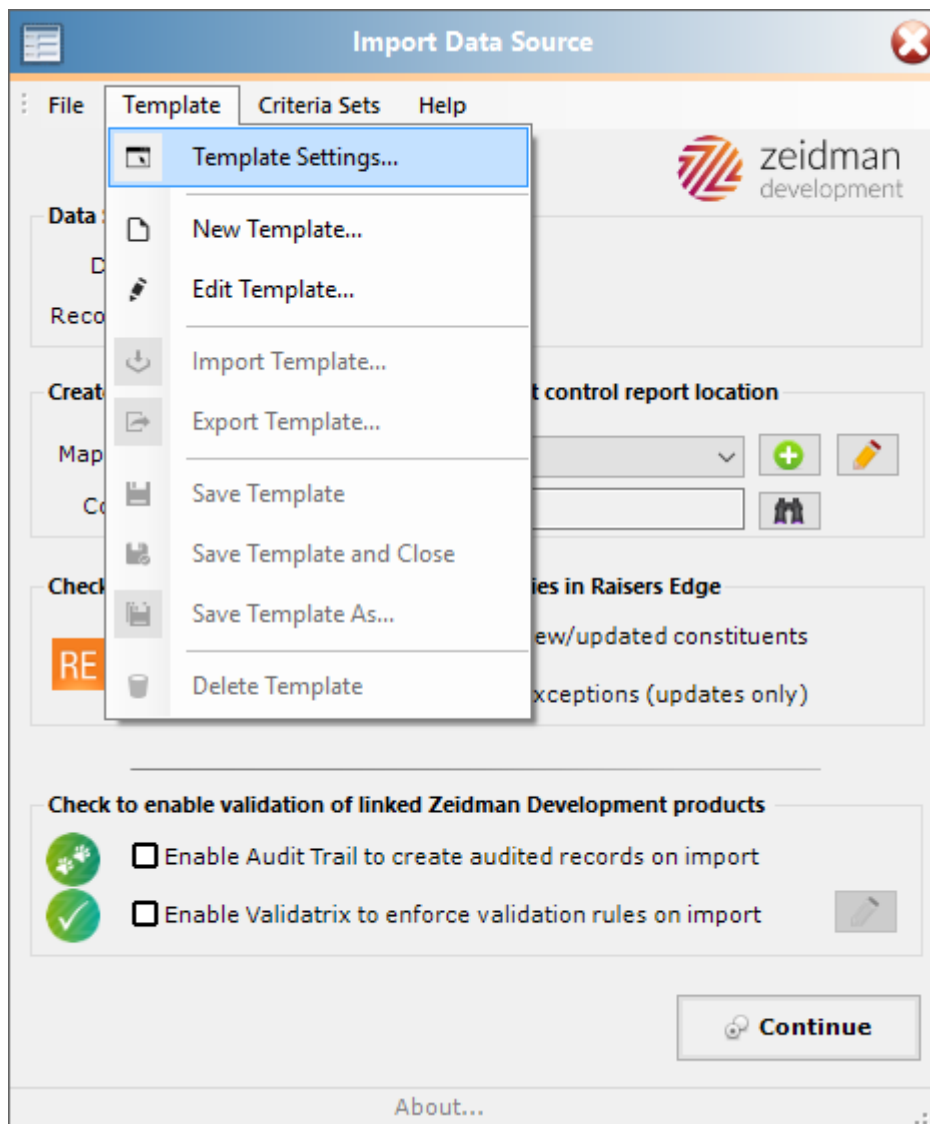


Once you have entered the settings to be used for the scheduled import press the save settings button to save the setting file to a known location.



Locate the Template Id

The template id is the id used for the mapping which includes the criteria sets used for the template. This can be found by proceeding to use the template. From the template menu select *Template Settings* as shown below



This will then show you the template settings. The final item is the template id to be used as shown below:



Template Settings (Website Import)

Template Details

Modify Template Name: Website Import

Records Last Imported:

Records Count: 1

Template Properties

Created By: Supervisor

Created Date: 06/07/2015 15:07:58

Last Updated By: Supervisor

Last Updated Date: 17/12/2015 17:36:56

Template Id: 8

Cancel Save

Data Source Files

When you run Importacular through Raiser’s Edge as a plugin, the data sources are downloaded ready for use. The Scheduler does not do this for you. You should ensure that you have used the plugin at least once for each data source you need to schedule. (There is no need to actually import any data into RE just go past the first source form screen at which point the data source has been downloaded).

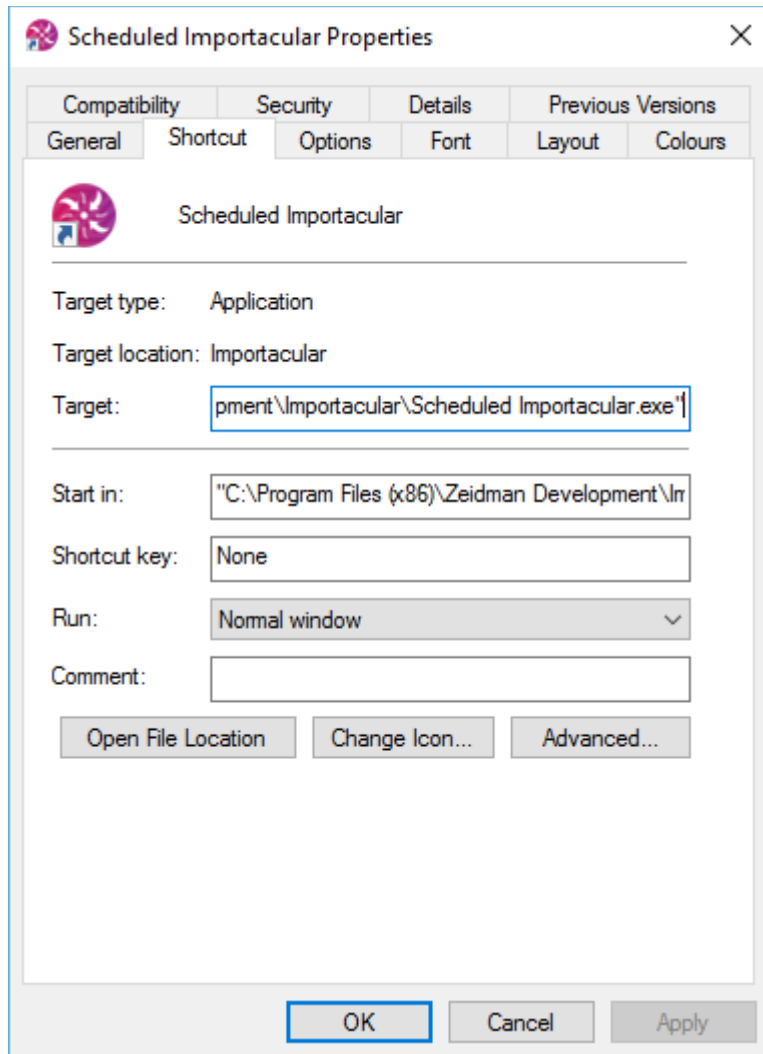
The data source files, once downloaded are usually stored in a temp location under the Windows profile of the user running RE. If you are running the schedule as a different user, then you either need to log in to RE using that user profile or specify the data source file location as a command line parameter (i.e. -l or -location).

Performing a Test Run

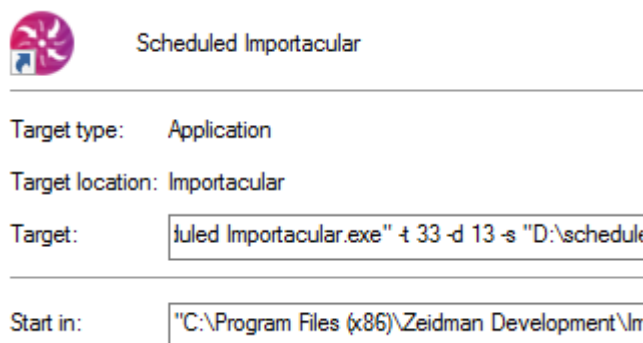
Now that the command line parameters have been generated it is possible to perform a test run of the non-interactive import.



Make a copy of the desktop shortcut that was created when Scheduled Importacular was installed. Right click on the shortcut and select properties



Paste the command line parameters in after the value in the target as shown below:



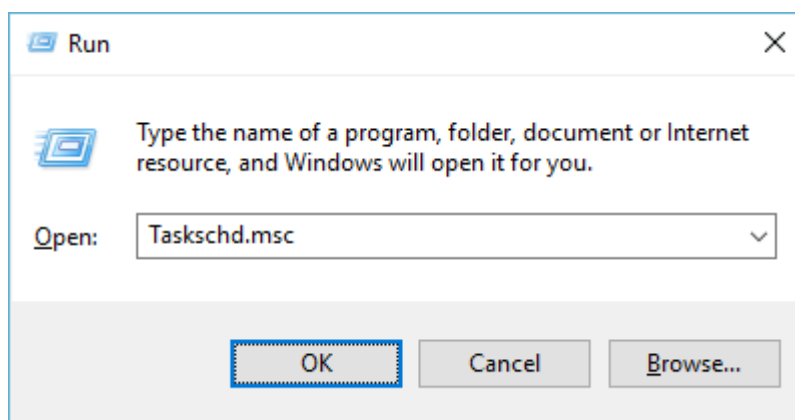
Now when you start the application using the shortcut it will run a non-interactive import. Check the control report to see if it was successful and the error logs to see if there were any specific errors.



Scheduling

In order to schedule an import you need to use Windows scheduler. This can be started by going to the run window by pressing the Windows Key + R

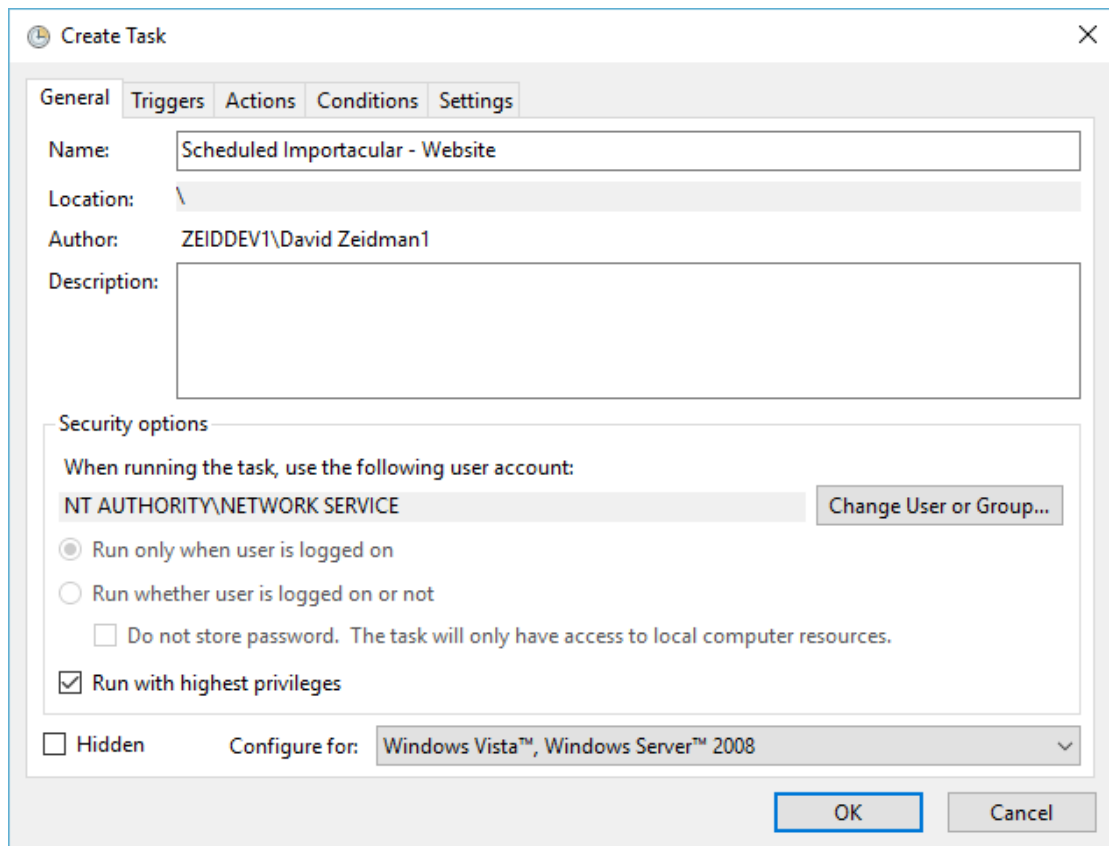
Enter *Taskschd.msc* in the Run window as shown below.



In the right hand pane under Actions select Create Task. You should create a task for each import that you want to run. Each task should have different command line parameters depending on the data source, data source settings and template used.

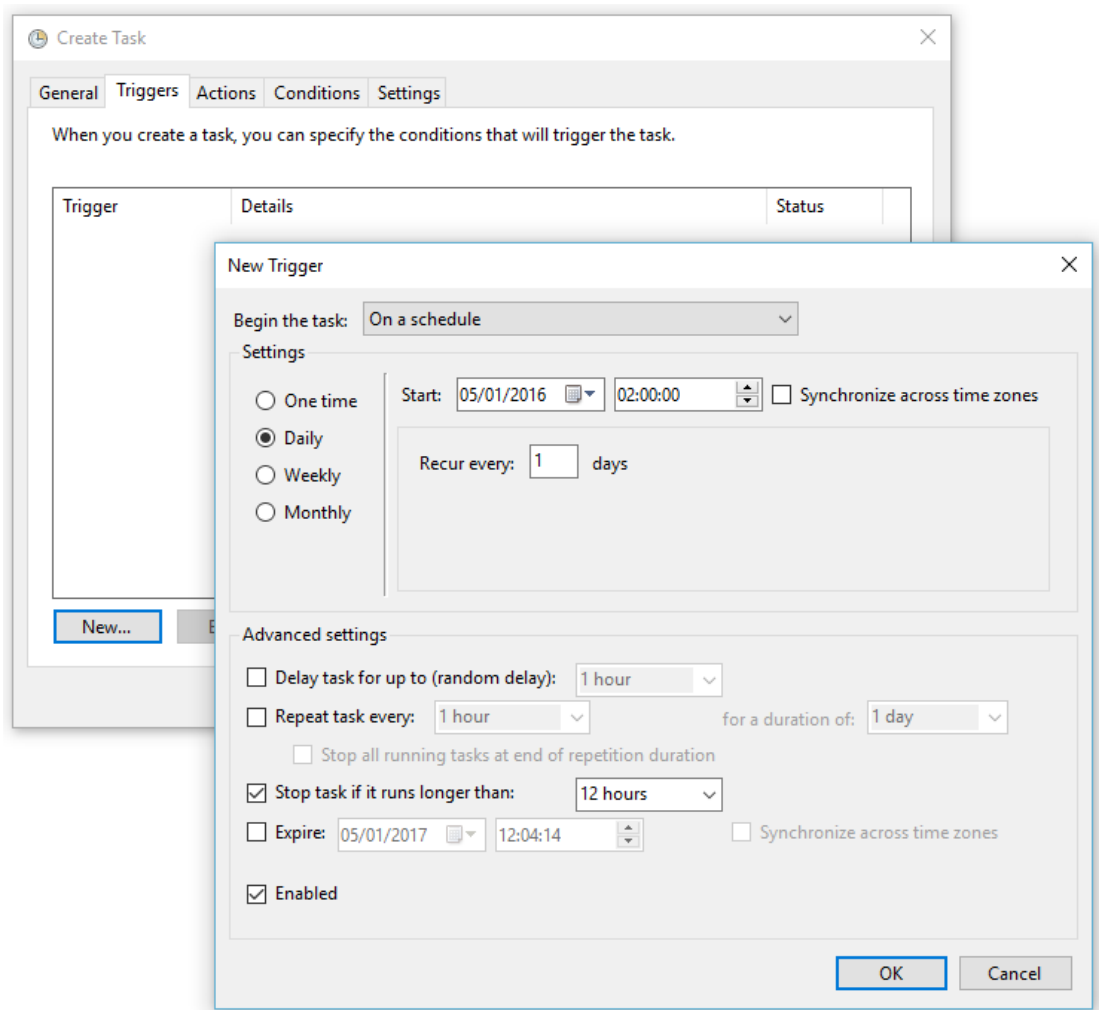
Add a name and optionally a description for the scheduled task. Select a user to run the task as. When running on a network it is advisable to run as a user that does not need to be logged into the machine.





Press on the Triggers tab and select new. Enter how often you would like the import to run and when. When deciding at what time the import should run, you should take into consideration any night-time backups or network activity that may affect the import process.



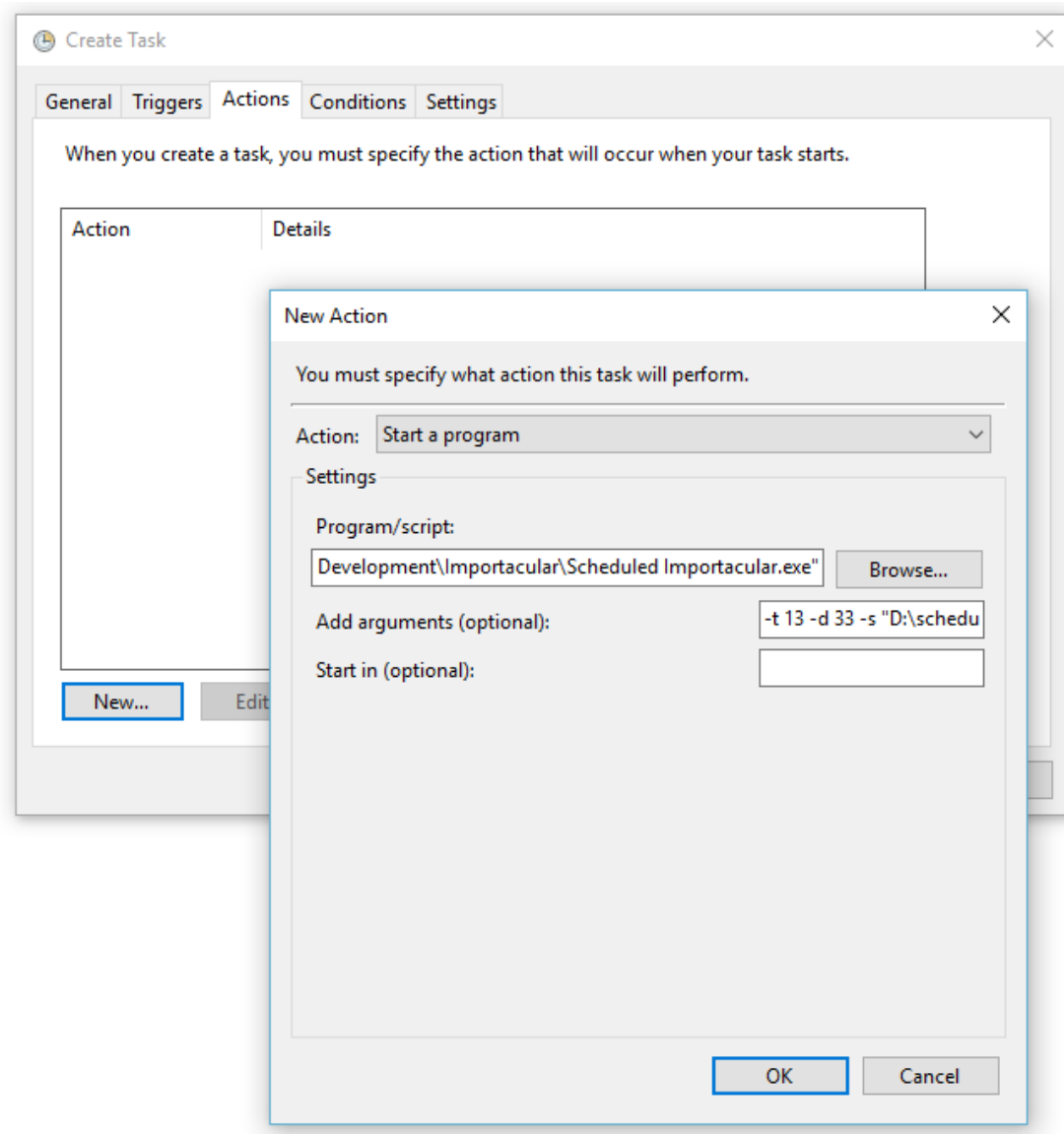


Press OK to add the trigger

Select the Actions tab and press New.

Enter the program location and the command line parameters as set up previously.





You may need to add the directory to the *Start in* box as in some systems without this value the application will crash when running through the scheduler.

Press OK to add the action

Complete any other values on the conditions or settings tabs as necessary and press OK to save the scheduled task.



