



Importing Records

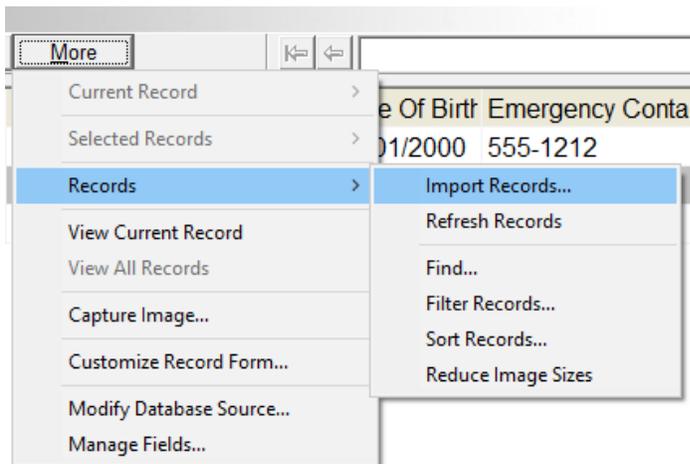
In all of our products, including Scan Station, there is an option in the Manage Records tool to import records from a file or database. To access this feature, the software needs to be running under an Administrators group account. If you have not created any custom groups or logins or you are using a Standard edition product and your software is running under the Administrator account, then you can continue with the steps below.

Step 1. Open Manage Records



Click on the Manage Records button in the lower right corner of the Main Menu. If this button is not available, then go to **Settings > This Workstation > Tasks** in order to turn on the Manage Records task.

Step 2. Go to the Import Records tool

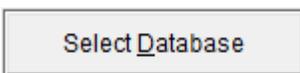


Within Manage Records, the **Import Records...** task is located under **More > Records > Import Records...**

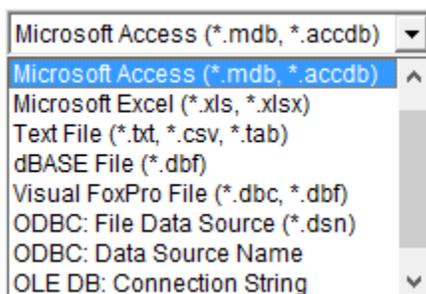
Opening up that task will bring up the Import Settings window. If you have previously imported into this group and your source file is available, you may see a list of records to import. Otherwise, you will see a screen saying **“Unable to connect to the database.”**

Click **Import Settings** to set up your import.

Step 3. Set up your import



Within the Import Settings, the first step is to select a data source. Click **Select Database** to choose from a number of different database types.



Note: Depending on your needs, you may wish to connect your software directly to the database that holds your user list. You can turn off or limit editing within the Users settings.

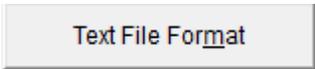
Otherwise select the database type that holds your source data. The most common choices are Microsoft Excel or Text File. Browse to your file, and select it.

Step 4. Import Settings for Excel Files

For Excel files, you will have two additional settings. First if you have a multiple page workbook, then you need to select a single worksheet. You also need to select a table primary key, which should be a

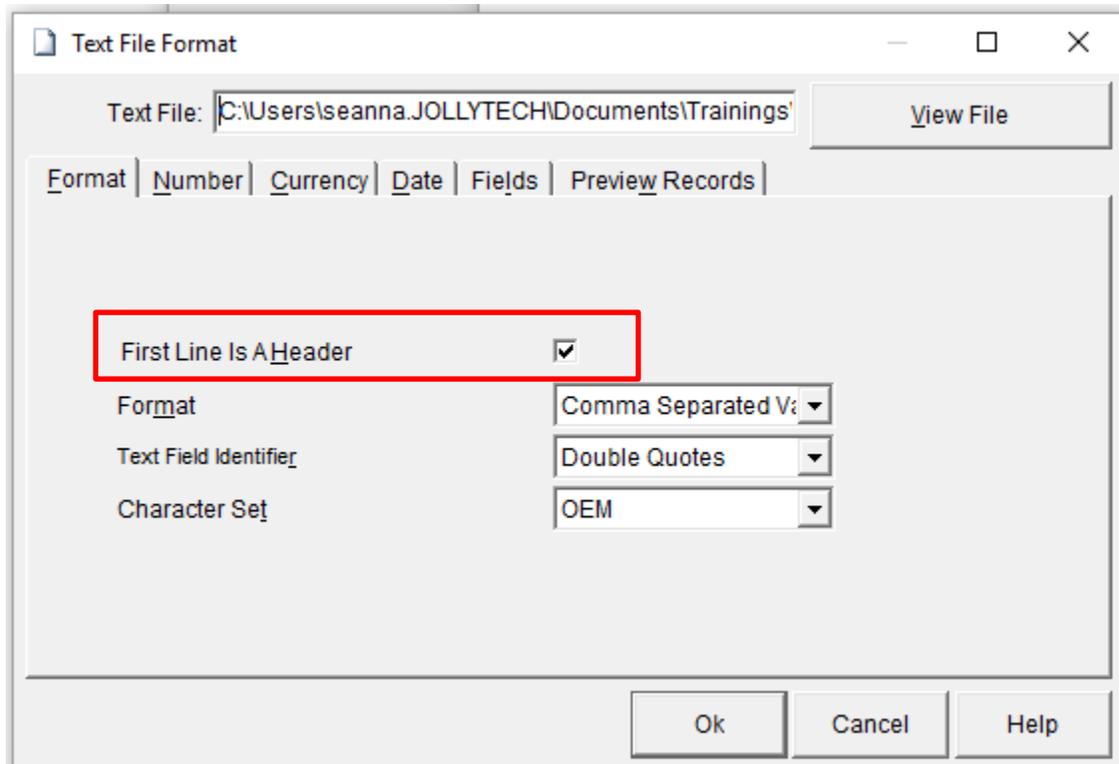
unique field that identifies each record as unique. Common choices include employee ID or student number. Once you have made these choices, click OK and go to **Step 6**.

Step 5. Import Settings for text files



Browse to your CSV or TXT file, and then click the Text File Format button.

The most common set up is that the first line is a header, indicating what the different columns are. If that is true of your file, make sure the **First Line is a Header** box is selected.



Go to the **Fields** tab, and click the **Auto Scan Fields** button. This will replace the default column designations (F1, F2, F3...) with the field names from your file. Here you can edit your field names, delete them from the list of items to import, and change their expected type. For some complex files, such as batch files, you will need to edit your field list. Please do not include in your field names any of the following: quotes (single and double), periods, question marks, or the number sign. Including these in your field names can cause errors in importing your records. Click OK when done in order to get to the main data source settings screen.

Step 6. Map your columns from the file to your database

Existing Database Fields	Import Database Fields
FirstName	FirstName
LastName	Email
School	FirstName
Grade	LastName
Homerroom	RecordNumber

Once you are back to the Import Settings screen, there will be two columns. The Existing Database Fields are the list of fields being used by your group database. The

Importing Records



Import Database Fields are the columns or fields in your data source. The software will match as many fields as it can. If a field from your file is not matched, you can click in the white space next to the corresponding Existing Database Fields to select a field from your file.

The software can check for duplicates during import. Select the field from your data source that is unique to the record, and indicate whether the software should merge or replace the record. It will check for duplicates based on the import field and whatever database field to which you have mapped it. Click OK to go to the Record Selection Screen.

Step 7. Selecting records

Now that you have mapped your data source fields, you will be on the main Import Records screen. This screen will show you all fields and entries from your data file regardless of whether you have included them in your import. You can select records in three different ways.

Method 1. Click the small check box to select all records in the data source

<input checked="" type="checkbox"/>	#	Record Number	Email	First Name	Last Name
<input checked="" type="checkbox"/>	1	33221	superman@superman.com	Clark	Kent
<input checked="" type="checkbox"/>	2	33222	iambatman@batman.com	Bruce	Wayne

Method 2. Select individual entries.

You can also select individual entries by checking the boxes next to each record.

Method 3. Enter line numbers or ranges in the Record Selection box

<input checked="" type="checkbox"/>	9	33229	lgod@valhalla.com	Loki	
<input type="checkbox"/>	10	33230	ogod@valhalla.com	Odin	
<input checked="" type="checkbox"/>	11	33231	spidy@webs.com	Peter	Parker

1-9,11-13 Auto Size Columns

You can manually type a range in the Record Selection box. Tabbing out of the box will activate any changes you made.

Once you have selected your records, click the large **Import** button. You will receive a confirmation screen indicating what records you are importing. Click **Yes** to confirm your selection or **No** to reselect your records. Once the import is complete, you will see an import summary screen indicating how many records were added, merged or replaced depending on your earlier settings.