



**HARRIS**  
GOVERN



# **I 03-ut-007 / I 03-ut-008**

## **EMT Export / EMT Import**

### **Govern V6**

**Release 6.0/6.1 Version 1**

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## EXPORT DATA TO FILE

### Overview (Export)

The Export Data form is used to export data structures from a specified database to an .XML file. The form allows you to export data settings through a step by step drill down process. The process is able to export everything from an entire database structure consisting of Modules, Module Elements (ME), and Module Element Components (MEC). The export process requires the user to select what elements of their database are to be exported. The export steps follow the Govern hierarchy. The Govern hierarchy is as follows:

#### Release 6.0

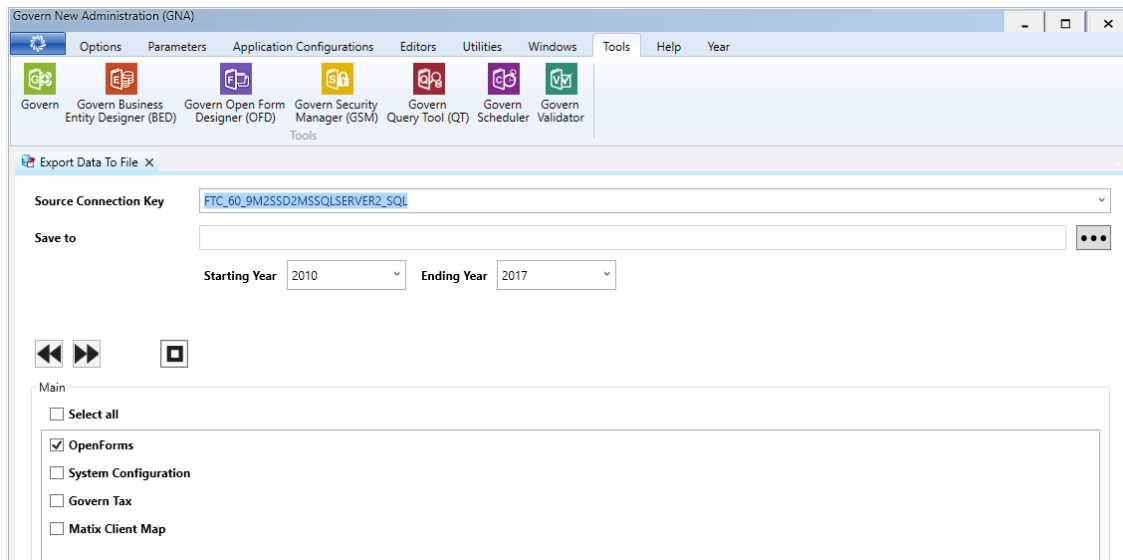
Modules	Module Elements (ME)	Module Element (ME) Components
<i>Open Form</i>	OpenForms	All Profiles, OpenForms, Business Models (BM), Business Entities (BE), Security ( <i>Selected, or All</i> )
	System Configuration	System Registry, Dynamic Search (Group, Styles), Logical Expressions, SQL Queries, Batch Processes, Reports, Text Styles, and so on.
	Govern Tax	Real Property, Personal Property, Motor Vehicle, and so on.
	Matix Client Map	Matix related Client Maps

**NOTE:** Although select Module Elements (ME's) appear to not be present in the

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Modules	Module Elements (ME)	Module Element (ME) Components
<i>Open Form</i>	OpenForms	All Profiles, OpenForms, Business Models (BM), Business Entities (BE), Security ( <i>Selected, or All</i> )
	System Configuration	System Registry, Dynamic Search (Group, Styles), Logical Expressions, SQL Queries, Batch Processes, Reports, Text Styles, and so on.
	Govern Tax	Real Property, Personal Property, Motor Vehicle, and so on.
	Mass Appraisal	MA Tables, Shared Lookup Group Set, BSE Templates, User Validation Entries
	Misc. Billing	MB (Categories, Items, Recurring Batches)
	Matix Client Map	Matix related Client Maps
	User Validation tables	Validation Tables (Regular, A/R, MA, Workflow, and so on)
	Workflow Management	Workflow Action Answers, Names, Status', Inspection Type Reason Codes/Status',

## Functionality

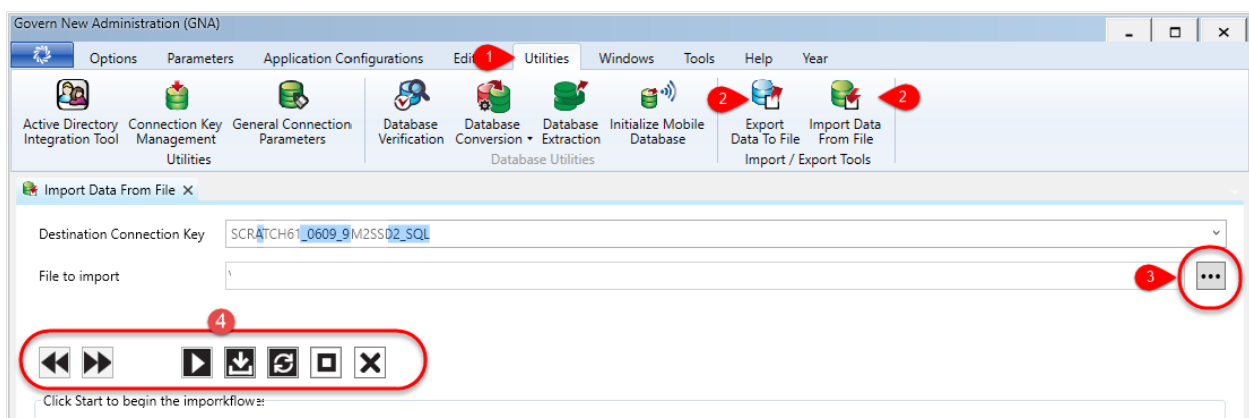


**NOTE:** Individual user Module Elements and ME Components will vary depending on which Govern modules have been purchased and licensed.

During the export process, user selections will determine what options are presented in the next step. When exporting entities, all required dependencies, i.e. tables, are also exported. The resulting exported file can then be imported to another database using the *Import Data* utility, see *Import Data from File* for details about this process.

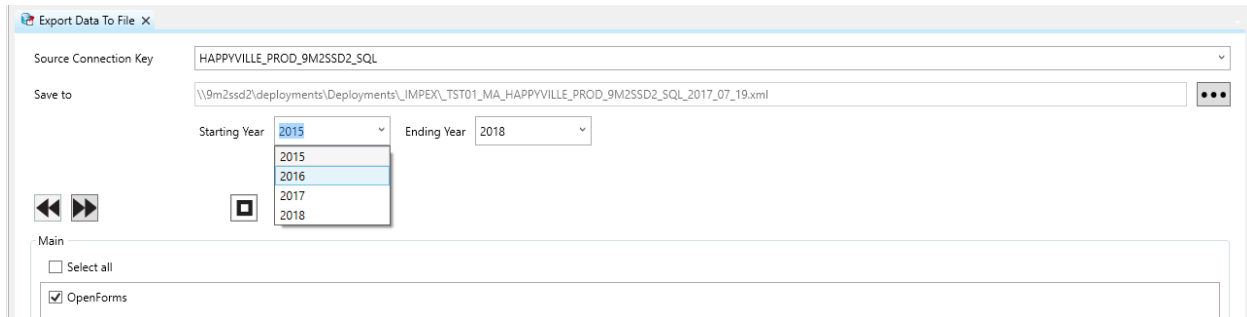
## User Interface (UI)

There are no noticeable changes from previous versions of the Import, and Export utility. Navigation through the stages and steps of the process is carried out with the navigation buttons



## Exporting a Module Element

As an example, an administrator can design a new Profile and then wish to export it. During the export process it will be necessary for them to make decisions as to what is to be exported. As part of their selection process a single profile may be selected, or all profiles within the database.



For example during the steps involved in the export process of a single Profile, any associated security settings related to roles can be selected.

## Security and Module Elements

By default when a profile is selected for export, NO security settings will be exported with it. Any securities associated with the profile will not be exported. As a result, a profile will be accessible to all roles and users.

### Exporting Module Elements WITHOUT Security...

When new securities for roles are to be defined, then it is not necessary to select the Security option for export.

To export Module Elements without security, from the GNA ribbon...

1. Select *Utilities (tab) > Import / Export Tools (group) > Export Data to File*.
2. In the Export form, Source Connection Key: field, select a Connection Key of the database that you will be extracting data from.
3. Look for the Save to: field, click Browse to choose a location and enter a file name.

**NOTE:** Unless an export filename is specified, the Export button will not become active, regardless of what selections are made.

4. Click Save, if the file name exists, you will be asked to confirm overwriting it. In the Main group, select OpenForm. Click Next.
5. In the next screen, you will note that the Main group has now changed to the OpenForm group. The group label is an indication of the level of the export process.
6. Click to select Profile. The *Next* button will become active; click **Next**.
7. In the next form, you are presented with the list of Profiles; select one, or click the first check box at the top of the list to select all profiles.
8. Note that the *Next* button [ >> ] has been changed to an *Export* [ > ] button. Click **Export** to generate the file.

The presence of the Export button [ > ] is an indication of the end of the selection process. At any point during this process, you can select Previous [<<] to return to the last step and modify your selection.

## Exporting an Open Form Model

Follow these steps to export an Open Form Model. When the Open Form Model to be exported does not require security, or securities are to be added at a later time, do not select the Open Form Model with the Security option.

1. Open GNA and select *Utilities (tab) > Import / Export Tools (group) > Export Data to File*.
2. In the Export form, in the Source Connection Key: field, select a Connection Key of the database that you will be extracting data from.
3. Look for the Save to: field, click Browse to choose a location and enter a file name.

**NOTE:** Unless an export filename is specified, the Export button will not become active, regardless of what selections are made.

4. Click Save, if the file name exists, you will be asked to confirm overwriting it. In the Main group, select OpenForm. Click Next.
5. In the next screen, you will note that the Main group has now changed to the OpenForm group. The group label is an indication of the level of the export process.
6. Click to select Open Form Model. The Next button will become active; click Next
7. In the next form, you are presented with the list of Open Form Models within the database; select one or more models, or click the first check box at the top of the list to select all models.
8. Note that the Next button has been changed to an Export button. Click Export to generate the file.

**NOTE:** The presence of the Export button [>] is an indication of the end of the selection process. At any point during this process, you can select Previous to return to the last step and modify your selection.

The length of the process is dependent upon the size and complexity of the database. When the process is complete, a dialog box is displayed.

9. Click OK to return to the Export form.

When there is another export to be performed, click **Restart** to return to the beginning of the process; alternatively, click **Exit** to close the form.

Locate the newly created file that is to be imported from the *Save to:* directory

## Exporting a Business Model or Business Entity

When exporting a Business Model or Business Entity follow the above steps, i.e. steps for Exporting an Open Form Model.

## Exporting Multiple Modules or Module Elements

Thus far, we have only exported single Module Elements (ME). Realistically we may need to export more than one module element at a time. For example if multiple module elements are selected, e.g. the following ME's:

- Profile
- Open Form (OF) Model
- Business Model (BM)

For this type of export, there would be multiple stages of user interaction before the export option is presented. We would need to make selections for Profiles, Open Form Models, and Business Models.

To make an export of multiple Module Elements (ME's)...

1. Open GNA and select *Utilities (tab) > Import / Export Tools (group) > Export Data to File*.
2. In the *Export* form, in the Source Connection Key: field, select a Connection Key of the database that you will be extracting data from.
3. Look for the Save to: field, click Browse to choose a location and enter a file name.
4. Click Save, if the file name exists, you will be asked to confirm overwriting it. In the Main group, select OpenForm. Click Next.
5. In the next screen, you will note that the Main group has now changed to the OpenForm group. The group label is an indication of the level of the export process.
6. Click to select Profile, Open Form Model, and Business Model. The Next button will become active; click Next.
7. The next step would be to select one or more Profiles; select Accounts Receivable and Land Management.
8. Click *Next*.
9. In the Open Form Model group, you will notice that some Models are already selected, this is an indication that they were already part of the profile selected in the previous step; note that you now have the opportunity to deselect them if required.
10. Click Next.
11. The final prompt will be for selecting Business Models (BM); select a BM.

**NOTE:** If you click Previous, you will be returned to the previous screen, but you will no longer be able to deselect any selections.

12. You will observe that the *Next* [>] button has been changed to an Export [>] button. Click **Export** to generate the file.

**NOTE:** Unless an export filename is specified, the Export button will not become active, regardless of what selections are made.

The methodology that is used for exporting multiple Modules or Module Elements applies to both OpenForms as well as System data structures. If a user were to export multiple System module elements, e.g. Dynamic Search groups, and Dynamic Search Styles, some Dynamic Search group items may be preselected, because they are part of the Dynamic Search Style.



## IMPORT DATA FROM FILE

### Overview (Import)

The Import Data form is used to import content into a database from an .XML file. As with the export process, there are a series of interactive steps to allow the user to control how data is imported. The import process consist of three (3) stages, Reading the File, Comparison of the imported data, Data contention (display of the Data Import Status, and resolution of data conflicts).

### Data Import Status and Data Conflicts

When a file is selected for import, the .XML data file is parsed; any possible conflicts with the existing destination database are displayed in the Collisions group in the lower portion of the form. The Data Import Status is displayed in a drop down menu..

**NOTE:** This process is not unlike the Initialize an OpenForms Environment utility, the difference is that this process is very granular with the information that is exported. In addition, during the import process, the user is given the option to over write their existing data. *Refer to Database Verification process for details.*

To import a data file...

1. Open the GNA and select *Utilities (tab) > Import / Export Tools (group) > Import Data from File.*
2. In the Import form, set the Destination Connection Key: field, by selecting a Connection Key of the database that you will be importing data into.
3. Look for the File to import: field, click Browse to locate the data file; double-click on the .XML file to import it.

**NOTE :** There can be a slight delay between the selection of the file and the return to the Import screen. The length of the pause is dependent upon the complexity of the file being read.

**NOTE: XXXXX** If the file to be imported was created with an older version of the Govern New Administration (GNA), it may not be compatible. An error message is displayed. In such instances, it may be necessary to re-export the file using the most recent version of the GNA.

4. Click Start [>] , to begin the process.

**NOTE:** The process will begin by reading the XML file. Depending upon the size and complexity of the file there may be a period of perceived inactivity.

### Data Import Status options

Options can be selected at various levels of the data import process. When selecting one of the options at the start of the process, all subsequent levels below will also be set to the chosen option.

Any conflicts are displayed in the lower portion of the form; the status of the data to be imported is presented in one of the status codes indicated below.

Color	Code	Details
Red	System	<p>This is an indication that this is a system file. This data is reserved for the System and will not be overwritten.</p> <p><b>NOTE-</b> Data that has been designated as reserved for the system, will not be overwritten. Selecting the Skip option is non-destructive; the Import process can be run again and the option to Replace can then be selected.</p>
Orange	Replace	<p>Data with this tag will be replaced, i.e. overwritten with newly imported data.</p> <p><b>WARNING</b> - When selecting the check box, be absolutely certain that you want to overwrite your existing data with the one that is being imported; this process is not reversible.</p>
New (Yellow)	New	<p>This is data that is new to the database, when selected it will be imported.</p>
Skip (Gray)	Skip	<p>The Skip indicator is an indication that a conflict exists, but the data in the target database will not be replaced with the incoming information. When the check box is selected, the indicator will display <b>Replace</b>; the color will be Orange.</p> <p><b>NOTE-</b> Choosing to leave the Skip option is non-destructive; the Import process can be run again and the option to Replace can then be selected.</p>

The **Import** process can be run multiple times. Each time the process is run users can selectively choose options that were not imported during the previous pass.

#### Completing the import process...

5. After resolving the conflicts by selecting or leaving the checkboxes, click **Next** [>>].
6. When you have gone through all levels for the import, click **Import** [v] when it appears.
7. When the process is complete, an Import Success dialog box is displayed. Click OK to return to the Import form.

When there is another import to be performed, click **Restart** to return to the beginning of the process; alternatively, click **Cancel** [ [] ] to close the form.

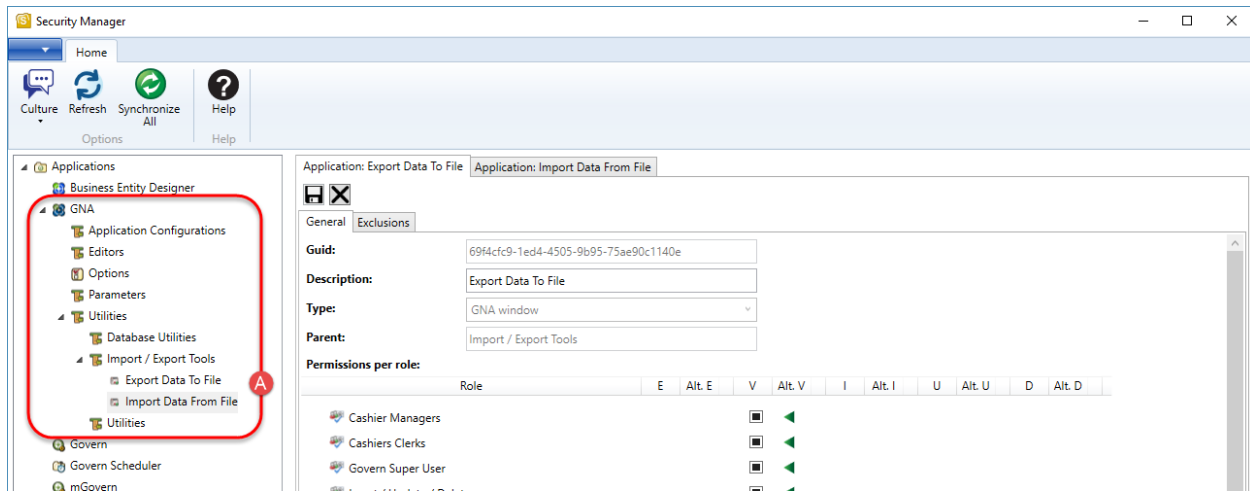
## CONFIGURATION

With the exception of security access, no additional system configuration is required for the Import or Export utilities.

## Security

### Securing Import / Export in the Security Manager (SM)

There are securable nodes available in the (SM). As is standard with the SM access can be granted by Role or by User. *Refer to the Govern Security Manager user guide for details about securing Govern suite applications with the SM.*



**NOTE:** When secured, access to the Import, the Export, or both will not be available on the ribbon; i.e. the group name is present but access buttons are not available.

Access the required node by expanding the following nodes:

*Applications > GNA > Utilities > Import / Export Tools > **Export Data to File** or **Import Data from File***

## APPENDIX

### Data Tables

A list of implicated data tables is not required for these utilities.