Using the EBS SQL Import Panel

ECi

ECi DDMS®

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Contents

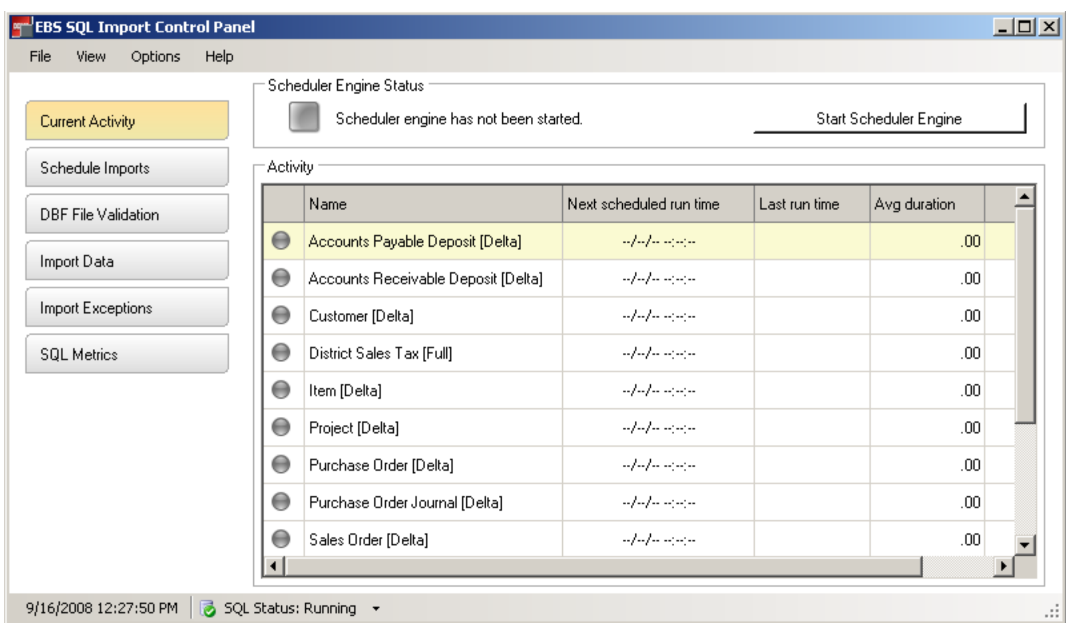
About the EBS SQL Import Panel

With the release of DDMS™ Version 8.16, the previous EBS Utility program has been replaced with the new EBS SQL Import Panel, shown in Figure 1. This window lets you validate and import your data for use with the new SQL databases, including the re-designed Furniture Project Management window, Customer Price Plans, Price Modeling, and SQL Reporting. The new EBS SQL Import program allows you better control over your imports including: importing on a file level, scheduling imports, real-time import monitoring and logging capabilities. This program gives you the ability to view database information, including SQL databases, table sizes, and record counts. When the initial import is made, a snapshot of the dbf files is created. Thereafter, when importing data, the new information is compared to the snapshot and only changes are imported. Once the update is complete, these changes are written to the snapshot.

This program is only loaded on your DDMS Server and is easily accessible from your Windows® Startup Menu.

Note: If you do not use any of the SQL applications such as Price Plans, Price Modeling, Project Management, or SQL Reporting, you do not need to start this program. Close the EBS SQL Import Control Panel by clicking File then Exit.

Figure 1: The EBS SQL Import Control Panel



When you install Version 8.16 or higher, the EBS SQL Import Control Panel automatically opens, along with the TBL Server window but *does not* automatically start. To use the program, you must set up the schedules and manually start the scheduler engine. Once you start using the EBS to SQL Import program, the W-CHANGES file is no longer used. Changes are now stored in the DDMS/Sync/Volume Serial folder, DDMS/Sync/IN, for example.

Note: You may need to check the size of the folder if backing up the entire folder. You may choose not to backup the snapshot if media size is an issue.

When you open the EBS SQL Import Control Panel, Current Activity is displayed. You can view the name of the event, the next scheduled run time, last run time, and average duration of run time.

Initially, you must perform a full import of your SQL data. Thereafter, you can perform Delta imports. Delta imports allow you to make frequent updates of the SQL tables without impacting your system resources.

Once you complete the initial import of your data, your DBF and SQL tables are synchronized. When you update your DBF files, files are automatically updated. These files are monitored and the information is imported into your SQL tables. As mentioned earlier, once you've completed the full import, the Delta import allows you to import only the changes. This gives you the freedom to import as frequently as you need with minimal impact on your system.

ECi recommends that you only perform the full import after large database changes such as the quarterly O/PUS update, user-defined mass changes, or mass price plans changes.

Before you begin using the EBS SQL install program, make sure you meet the necessary requirements and have the proper software installed. The first time you use one of the new DDMS EBS programs, you must complete all the steps in this handout. Thereafter, you may need to refer back to this document to import new files, if needed.

System Requirements

Previously, you had to set the Using Roadrunner field in the (LØ) screen to Y to enable the SQL data synchronization process. Now, the synchronization process is available whenever you are ready to start using the program. All you have to do to begin is install the latest DDMS Version (8.16 or later). Contact ECi Support to order the newest version, if needed.

For information on loading any of these programs, refer to the appropriate update instructions included with the software package.

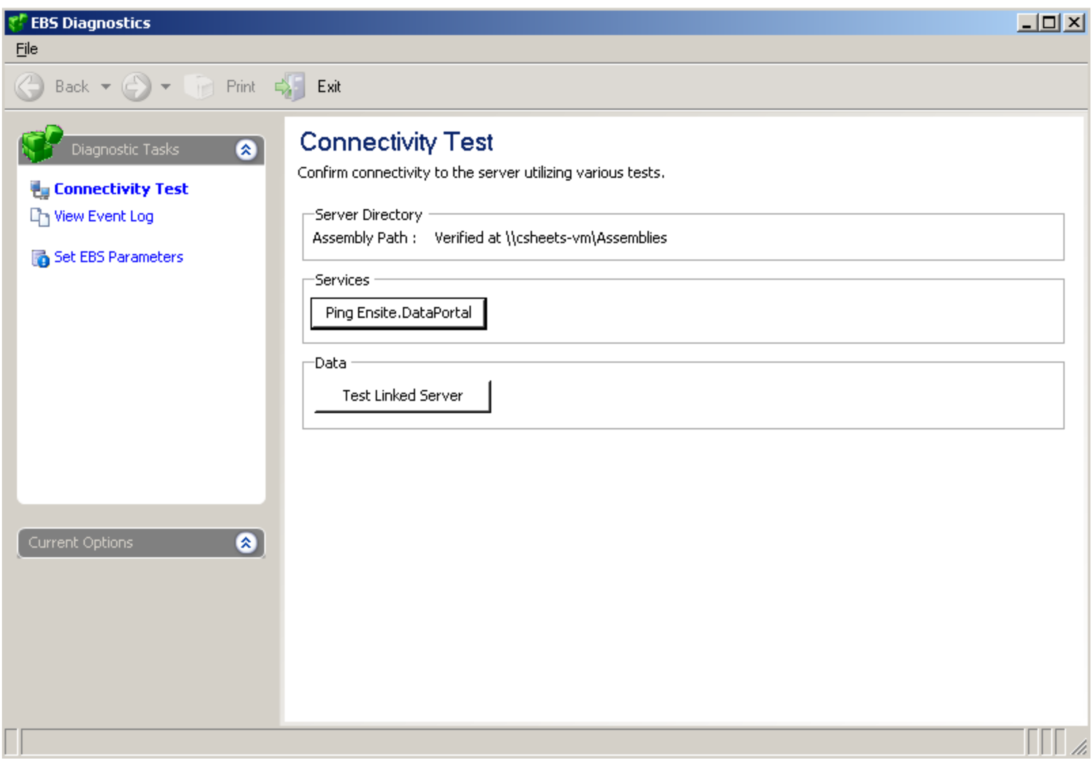
SQL Data Synchronization

Beginning with Version 8.16, several DDMS applications work primarily with data in a SQL database. Before you can use the re-designed Furniture Project Management window, Customer Price Plans, Price Modeling, SQL Reporting, and so on, your DDMS data must be initially validated, corrected as needed, and imported into the SQL database.

When you import, the system creates a file record of the changes. It views the information set in the text-based (LØ) Global Master Parameters screen to determine which volumes to copy. After you validate and import for the first time, the system synchronizes your data between the DBF files and the SQL database in the background according to the schedule you create. You can determine when the system synchronizes by specifying the service import schedule. The system defaults to import daily between the hours of 8:00 am to 5:00 pm with a four hour execution delay. However, you have the option of changing the settings or of deleting the schedule at any time. You can also set up multiple schedules.

When you make changes in Customer Price Plan and Price Modeling, the changes are written to the SQL database first. You can continue working as SQL changes trigger the synchronization process to write to your DBF files in the background.

Figure 2: Connectivity Test



Note: If you are using the EBS features and need to view your SQL database tables, you need to download SQL tools. To do this, go to http://www.microsoft.com/downloads/details.aspx?FamilyId=C243A5AE-4BD1-4E3D-94B8-5A0F62BF7796&displaylang=en and follow the prompts.

Confirming Connectivity to the Server

1 Open Explorer and navigate to C:\DDMS\CLIENT\Browser or D:\DDMS\CLIENT\Browser on the DDMS Server.

Note: TBL Server must be running.

2 Double-click EnsiteEBS.exe to open the EnsiteEBS Utility Program.

3 Before you import data to SQL, you need to confirm that your server is properly connected.

3.1 Click Connectivity Test to open. See Figure 2.

3.2 Under Services, click Ping Ensite.DataPortal. After you click the Ping button, you should receive a message stating that it is connected. If you do not receive this message, contact ECi support.

3.3 Click Test Linked Server. You should receive a confirmation message. If you do not, contact ECi support for assistance.

3.4 When finished, click Exit.

Getting Started

Before using the program for the first time, you should confirm server connectivity. Refer back to the heading **Confirming Connectivity to the Server**.

The EBS SQL Import Control Panel opens when you start your DDMS server. If you inadvertently closed the window and need to reopen, you can start it from the Windows Start Menu. You can also click Start, then Programs. Click Startup, then click EBS SQL Import Control Panel.

If you are currently using or plan to use Customer Price Plans, Price Modeling, SQL Reporting, and the new Furniture Project Management, you must perform the steps listed below (after you've installed 8.16.2). Perform these steps using the new EBS SQL Import Panel.

- DBF File Validation. Validate your data then correct any errors before importing.
- Import Data. You must import your data from DBF to SQL. You must perform a full import.

- Schedule Imports. You can set up an import schedule and configure by file groups. You decide how frequently to update the SQL tables.
- Start Scheduler Engine. After you've created schedules, you must click Start Scheduler Engine.

Using the EBS SQL Import Program

The EBS SQL Import program allows you to perform several functions:

- View Current Activity
- Schedule Imports
- Validate DBF files
- Import Data
- Import Exceptions
- View SQL tables.

From the View menu, you can view scheduler engine logs and Import Control Panel log files.

In the Options menu, you can select to execute import schedules in parallel or sequentially. Sequential execution is the default. Selecting In Parallel allows you to run full or Delta imports at scheduled times even if other imports are already in progress. This could cause a significant affect on your system performance depending on the events. If you select Sequential Execution, all scheduled imports, full or Delta, do not execute until all other events are complete. ECi recommends Sequential Execution.

From the Options menu, you can also refresh the SQL Parameter tables.

Once you set up schedules, click Start Scheduler Engine to start the program. Once done, you can click Stop Scheduler Engine to disable schedules, if needed. Once you start running schedules, you should not close the EBS SQL Import Control Panel. You can click the X in the upper right corner to minimize the window. However, you should only close the window if you do not use any of the SQL applications such as Price Plans, Price Modeling, Project Management, or SQL Reporting. To close the window, click File then Exit.

A status bar displays at the bottom of the window that allows you to start or stop SQL. The SQL Status Running message is displayed when SQL is active. To stop SQL, click the arrow and select Stop the ECi SQL Service. *However, you should not stop the service unless it is required for IT maintenance.*

Validating DBF Data

Before you import DBF data to SQL, you need to make sure that the data is valid. The new SQL database requires that data adhere to specific rules. For example, numeric fields must have valid numeric values and date fields must have valid dates.

1. To open the EBS SQL Import Control Panel, click Start then EBS SQL Import Control Panel.
2. Click DBF File Validation.
3. The Validate DBF Data window opens. See Figure 3.

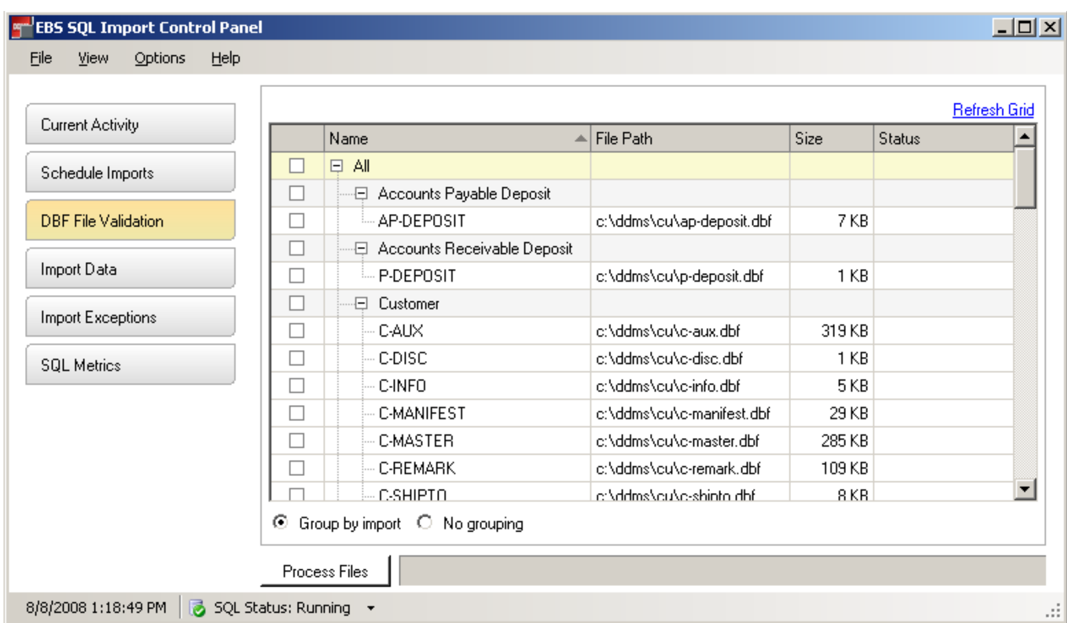
   To validate all files, click the first check box for All. All files are marked for validation.

   To validate specific files, check the box corresponding to the files to validate.

   You can also select Group by Import or select No Grouping.
4. Click Process Files. As the system is validating, a Complete message appears next to the file name.

   If there are errors, the DBF Data Error Encountered message appears. Click Yes and the DBF Validation Exception Report opens. You can print this report or save it. If you close this report without saving, you cannot access it again. To correct common errors, refer to the *Troubleshooting DDMS SQL Validation Errors* handout on our web site at http://www.ddms.com/support/faq/utilities.htm. If you need further assistance, contact ECi support for assistance.

Figure 3: Validating DBF Data



Importing Data to SQL

After you successfully validate your information, you can import data to SQL. Remember you only need to perform the full import the first time you import or subsequently when you make large database changes.

1 Click Import Data.

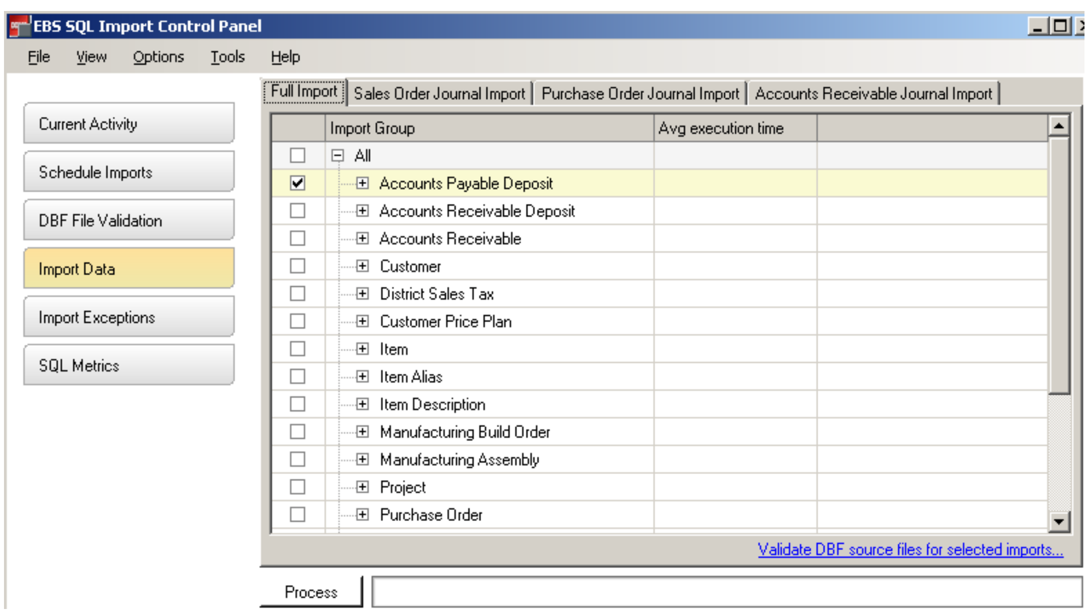
2 The Import Data window opens, displaying the Full Import tab. See Figure 4. This window also contains the Sales Order Journal and Purchase Order Journal Import tabs. Begin by importing data using the Full Import tab.

   To mark all files for import, click the first All check box.

   To import only specific files, check the box corresponding to the files to import.

Note: If you have not already validated your data, you must do so before importing. Click the Validate DBF Source Files for Selected Imports link. A window opens so you can validate the files you marked. You must fix any problems identified before importing. Files are validated individually but must be imported by file group. You must import all data files before using the new Furniture Project Management, Price Plans and Price Modeling features.

Figure 4: The Full Import Tab



3 Click Process. The system begins importing data and displays a green progress bar as the files are imported into the selected SQL Tables. The Avg Execution Time column displays the time spent importing each line of data. See Figure 5. (When importing for the first time, a snapshot of your data is created. If you had not previously imported, that snapshot is created now.)

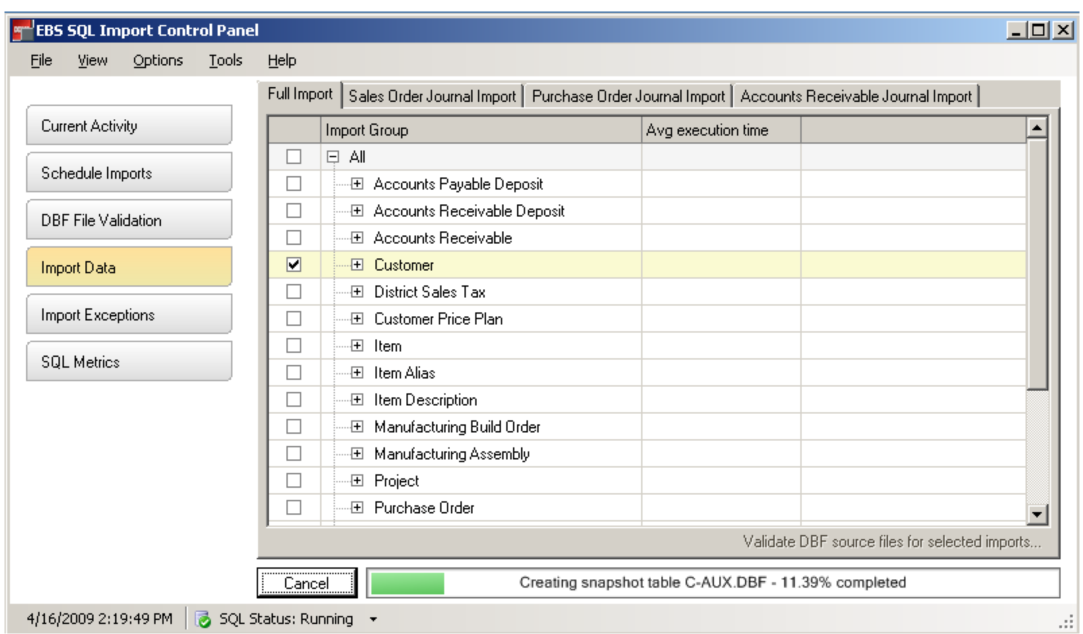
4 Once the program finishes, the View Import Exceptions window opens, displaying any files that were not imported.

Note: The system does not import records with duplicate keys. If you have other exceptions, contact ECi support for assistance.

Importing Sales and Archived Journals

You must import sales journals to SQL if you plan to use any of the new EBS programs to analyze past sales. You must import data from sales journal files to the SalesOrderJournal SQL Table and the SalesOrderArchive SQL Table. The SalesOrderJournal contains your most recent sales. You must specify the number of months to store in this table. All sales that are older than the specified number of months can be imported to the SalesOrderArchive during the same procedure. After the initial import, the system automatically adds new completed sales to the SalesOrderJournal file. It also moves past sales that are no longer within the specified number of months to the SalesOrderArchive table.

Figure 5: Importing Data



1 In the Import Data window, click the Sales Order Journal Import tab. The tab opens, displaying the SalesOrderJournal option in the Import Records Into box. See Figure 6.

2 Click the All check box to import all sales order journal files.

To import specific files, click the check box next to each file to import.

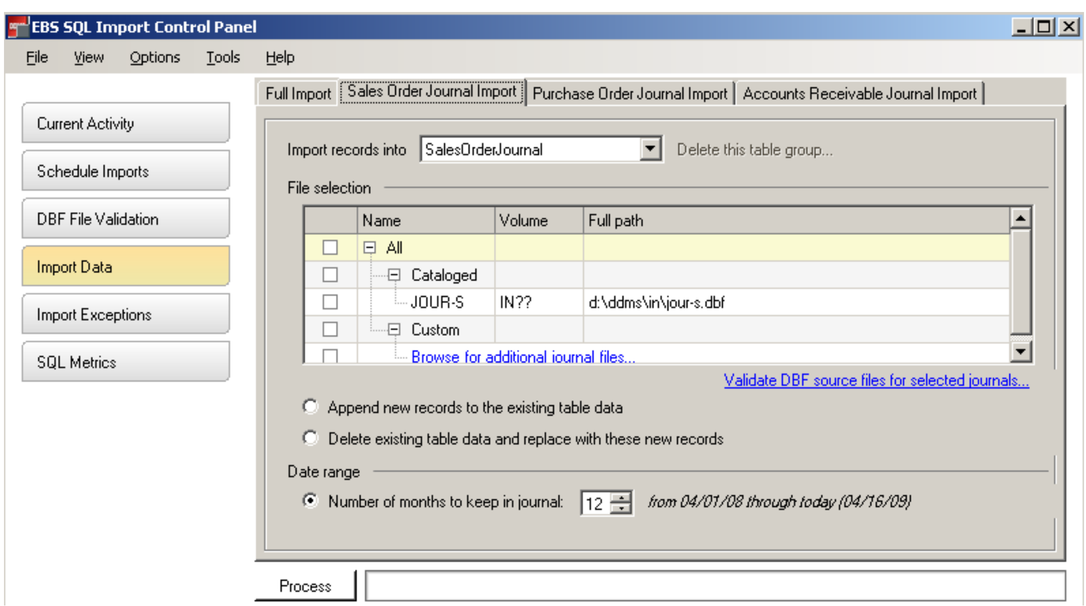
All sales journals listed in the (LGA) screen are displayed in the File Selection box. If the file to import is not displayed, scroll down in the File Selection box until the Browse For Additional Journal Files link appears. Click this link to mark any journals not shown in the current list.

Note: If you have not already validated your data, you need to do so before you import. Click the Validate DBF Source Files for Selected Journals link. A window opens so you can validate the journal files you marked.

3 Select the SQL table for the new records.

- To import the data into a table with previously imported data, click the Append New Records to the Existing Table Data option.
- To import the data into a new table or to replace an existing table with your current import selectors, click the Delete Existing Table Data and Replace with these New Records option.

Figure 6: Importing Sales Order Journal Files



4 In the Number of Months to Keep in Journal box, enter the number of months to keep data in the SalesOrderJournal. The journal keeps data up to the current date. For example, if you select 12 months, the journal keeps data from the most recent 12 months. ECi recommends that you accept the default of 12 months. Once you make this selection, the system automatically adds and removes records so that the file retains only journals for the time frame specified. Records older than the time frame are added to the SalesOrderArchive on a daily basis.

5 Click Process. The green progress bar appears as the records are processed.

6 When the process is complete, you can import journals to the SalesOrderArchive SQL table. Click the down arrow in the Import Records Into box and click the SalesOrderArchive option. See Figure 7.

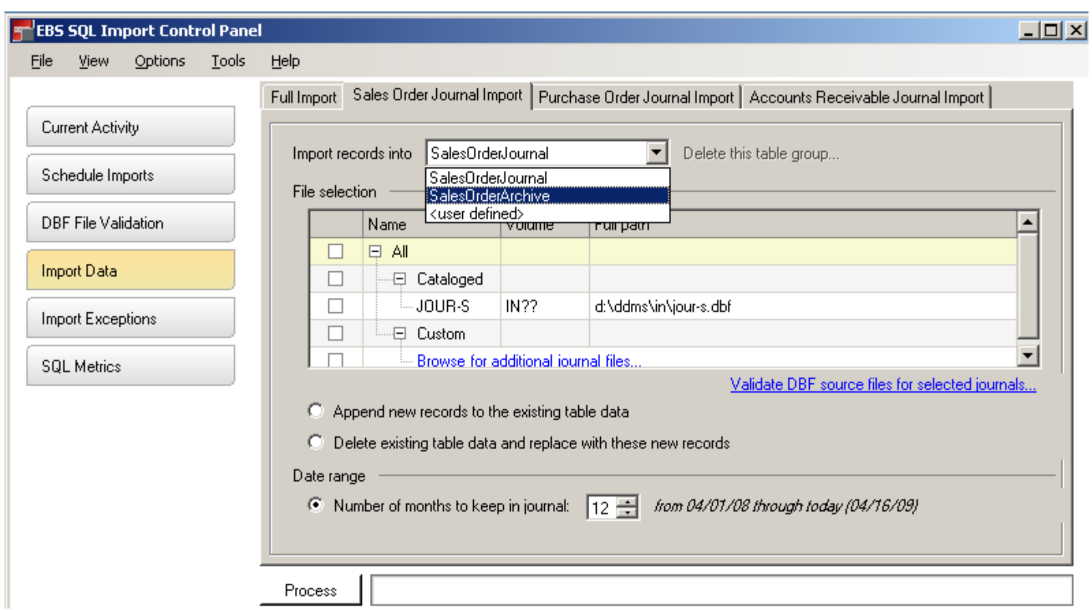
7 Click the first All check box to import all sales order archive files.

To import specific files, click the check box next to each file to import.

If the file to import is not displayed, scroll down in the File Selection box until the Browse For Additional Journal Files link appears. Click this link to mark any journals not shown in the current list.

Note: If you have not already validated your data, you need to do so before you import. Click the Validate DBF Source Files for Selected Journals link. A window opens so you can validate the journal files you marked.

Figure 7: Selecting the SalesOrderArchive Option



8 Select the SQL table for the new records.

- To import the data into a table with previously imported data, click the Append New Records to the Existing Table Data option.
- To import the data into a new table or to replace an existing table with your current import selectors, click the Delete Existing Table Data and Replace with the New Records option.

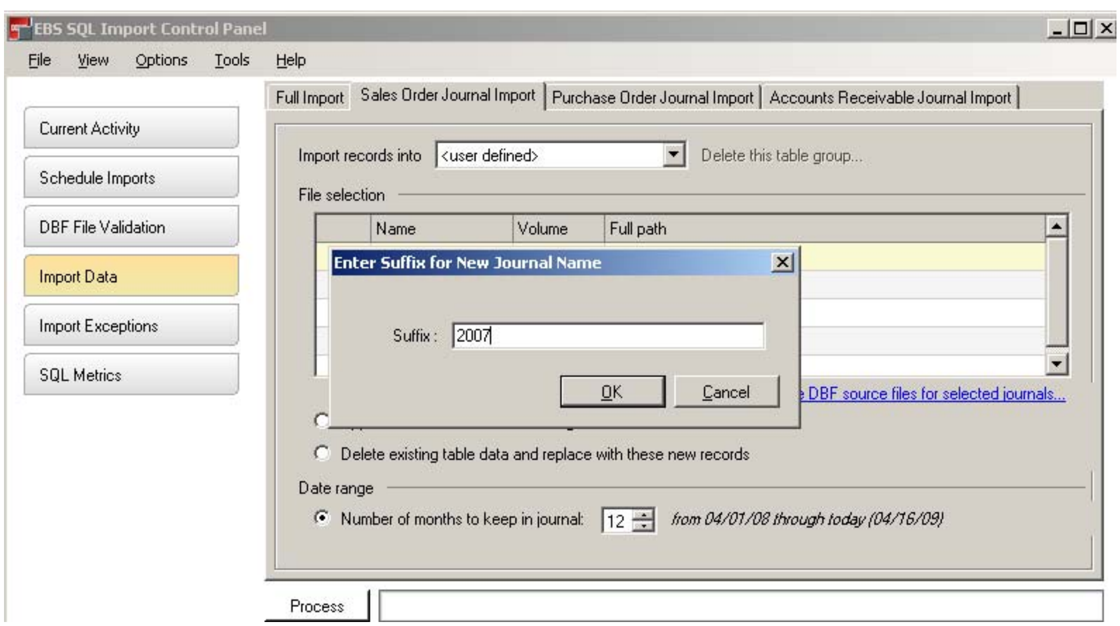
9 Select the Date Range by which to limit your import.

- To import all invoices, regardless of date, click the Import All Invoices option.
- To import invoices using a date range, click the Only Import Invoices with a Date Between option. Click the down arrow in the From and corresponding To boxes to select the date range for which to place journals in the SalesOrderArchive. You should import journal files older than those imported into SalesOrderJournal. Using the example in **Step 4**, you would import journal files older than 12 months.

10 Click Process. The green progress bar appears as the records are processed.

After your initial import, you should create a schedule for the Delta import of your sales journals.

Figure 8: Importing User Defined Journal Files



Importing User Defined Sales Journals

You can import specific files into the SalesOrderArchive or a user defined SQL table, for example, SalesOrder2007.

1. In the Import Data window, click the Sales Order Journal Import tab. Click the down arrow in the Import Records Into box and click the User Defined option.
2. The Journal Import Table Name Entry Form opens, shown in Figure 8. Enter the suffix of the journal to import and click OK. For example, you might name this SalesOrder2007. In this example, SalesOrder is the default and you enter the suffix of 2007 in this box.
3. Click the first All check box to import all files.

   To import specific files, click the check box next to each file to import.

   If the file to import is not displayed, scroll down in the File Selection box until the Browse For Additional Journal Files link appears. Click this link to mark any journals not shown in the current list.

Note: If you have not already validated your data, you need to do so before you import. Click the Validate DBF Source Files for Selected Journals link. A window opens so you can validate the journal files you marked.

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4. Select the SQL table for the new records.
   - To import the data into a table with previously imported data, click the Append New Records to the Existing Table Data option.
   - To import the data into a new table or to replace an existing table with your current import selectors, click the Delete Existing Table Data and Replace with these New Records option.
5. Select the Date Range by which to limit your import.
   - To import all invoices, regardless of date, click the Import All Invoices option.
   - To import using a date range, click the Only Import Invoices with a Date Between option. Click the down arrow in the From and corresponding To boxes to select the date range to import.
6. Click Process. The green progress bar appears as the records are processed.

Deleting User Defined Sales Journals

You can delete user defined table groups.

1. In the Import Data window, click the Sales Order Journal Import tab.
2. Click the down arrow in the Import Records Into box and select the user defined sales order table.
3. Click Delete This Table Group (to the right of the Import Records Into box).
4. The Delete Table Group dialog box opens. Click Yes to delete the selected table group. Click No to not delete the selected table group.

Importing Purchase Order Journals

You must import purchase order journals to SQL if you plan to use the new application to analyze past purchase orders. You can use the Purchase Order Journal Import tab to import data from purchase order journal files to the PurchaseOrderJournal SQL Table and the PurchaseOrderArchive SQL Table. The PurchaseOrderJournal contains your most recent purchase orders. You must specify the number of months to store in this table. All purchase orders that are older than the specified number of months can be imported to the PurchaseOrderArchive during the same procedure. After the initial import, the system automatically adds newly completed purchase orders to the PurchaseOrderJournal file. It also moves previous purchase orders that are no longer within the specified number of months to the PurchaseOrderArchive table.

1. In the Import Data window, click the Purchase Order Journal Import tab. The Import Records Into box defaults to PurchaseOrder Journal.
2. Click the first All check box to import all PO journal files.

   To import specific files, click the check box next to each file to import. All purchase order journals listed in the (LF2) screen are displayed here.

   If the file to import is not displayed, scroll down in the File Selection box until the Browse For Additional Journal Files link appears. Click this link to mark any journals not shown in the (LF2) screen list.

Note: If you have not already validated your data, you need to do so before you import. Click the Validate DBF Source Files for Selected Journals link. A window opens so you can validate the journal files you marked.

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3. Select the SQL table for the new records.
   - To import the data into a table with previously imported data, click the Append New Records to the Existing Table Data option.

- To import the data into a new table or to replace an existing table with your current import selectors, click the Delete Existing Table Data and Replace with these New Records option.

4 In the Number of Months to Keep in Journal box, enter the number of months to keep data in the PurchaseOrderJournal. The journal keeps data up to the current date. For example, if you select 12 months, the journal keeps data from the most recent 12 months. ECi recommends that you accept the default of 12 months. Once you make this selection, the system automatically adds and removes records so that the file retains only journals for the time frame specified. Records older than the time frame are added to the PurchaseOrderArchive on a daily basis.

5 Click Process. The green progress bar appears as the records are processed.

6 When the process is complete, you can import journals to the PurchaseOrderArchive SQL table. Click the down arrow in the Import Records Into box and click the PurchaseOrderArchive option.

7 Click the first All check box to import all sales archive files.

To import specific files, click the check box next to each file to import.

If the file to import is not displayed, scroll down in the File Selection box until the Browse For Additional Journal Files link appears. Click this link to mark any journals not shown in the (LF2) list.

Note: If you have not already validated your data, you need to do so before you import. Click the Validate DBF Source Files for Selected Journals link. A window opens so you can validate the journal files you marked.

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8 Select the SQL table for the new records.

- To import the data into a table with previously imported data, click the Append New Records to the Existing Table Data option.
- To import the data into a new table or to replace an existing table with your current import selectors, click the Delete Existing Table Data and Replace with these New Records option.

9 Select the Date Range by which to limit your import.

- To import all purchase orders, regardless of date, click the Import All Invoices option.
- To import purchase orders using a date range, click the Only Import Invoices with a Date Between option. Click the down arrow in the From and corresponding To boxes to select the date range

for which to place journals in the JournalOrderArchive. You should import journal files older than those imported into PurchaseOrderJournal. Using the example in **Step 4**, you would import journal files older than 12 months.

10 Click Process. The green progress bar appears as the records are processed.

Importing User Defined Purchase Order Journals

You can import specific files into the PurchaseOrderArchive or a user defined SQL table, for example, PurchaseOrder2005.

1 In the Import Data window, click the Purchase Order Journal Import tab. Click the down arrow in the Import Records Into box and click the User Defined option.

2 When the Journal Import Table Name Entry Form opens, enter the suffix of the journal to import and click OK. For example, you might name this PurchaseOrder2005. In this example, PurchaseOrder is the default and you enter the suffix of 2005 in this box.

3 Click the first All check box to import all files.

To import specific files, click the check box next to each file to import.

If the file to import is not displayed, scroll down in the File Selection box until the Browse For Additional Journal Files link appears. Click this link to mark any journals not shown in the current list.

Note: If you have not already validated your data, you need to do so before you import. Click the Validate DBF Source Files for Selected Journals link. A window opens so you can validate the journal files you marked.

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4 Select the SQL table for the new records.

- To import the data into a table with previously imported data, click the Append New Records to the Existing Table Data option.
- To import the data into a new table or to replace an existing table with your current import selectors, click the Delete Existing Table Data and Replace with these New Records option.

5 Select the Date Range by which to limit your import.

- To import all invoices, regardless of date, click the Import All Invoices option.
- To import using a date range, click the Only Import Invoices with a Date Between option. Click the down arrow in the From and corresponding To boxes to select the date range to import.

6 Click Process. The green progress bar appears as the records are processed.

7 Select the date range by which to limit your import. The system defaults to 12 months before the dates you selected for the PurchaseOrderJournal import.

Note: If you have not already validated your data, you need to do so before you import. Click Validate Source DBF Data.

8 Click Process.

Deleting User Defined Purchase Order Journals

You can delete user defined table groups.

1 In the Import Data window, click the Purchase Order Journal Import tab.

2 Click the down arrow in the Import Records Into box and select the user defined purchase order table.

3 Click Delete This Table Group (to the right of the Import Records Into box).

4 The Delete Table Group dialog box opens. Click Yes to delete the selected table group. Click No to not delete the selected table group.

Importing Accounts Receivable Journals

You must import accounts receivable journals to SQL if you plan to use the new application to analyze past accounts receivable. You can use the Accounts Receivable Journal Import tab to import data from accounts receivable journal files to the AccountsReceivableJournal SQL Table, the AccountsReceivableArchive SQL Table, and the AccountsReceivableDeposit SQL Table. The AccountsReceivableJournal contains your most recent purchase orders. You must specify the number of months to store in this table. All purchase orders that are older than the specified number of months can be imported to the AccountsReceivableArchive during the same procedure. After the initial import, the system automatically adds newly completed A/R to the AccountsReceivableJournal file. It also moves previous A/R that is no longer within the specified number of months to the AccountsReceivableArchive table.

1 In the Import Data window, click the Accounts Receivable Journal Import tab. The Import Records Into box defaults to AccountsReceivableJournal.

2 Click the first All check box to import all A/R journal files.

To import specific files, click the check box next to each file to import. All accounts receivable journals listed in the (LA4) screen are displayed here.

If the file to import is not displayed, scroll down in the File Selection box until the Browse For Additional Journal Files link appears. Click this link to mark any journals not shown in the (LA4) screen list.

Note: If you have not already validated your data, you need to do so before you import. Click the Validate DBF Source Files for Selected Journals link. A window opens so you can validate the journal files you marked.

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3. Select the SQL table for the new records.
    - To import the data into a table with previously imported data, click the Append New Records to the Existing Table Data option.
    - To import the data into a new table or to replace an existing table with your current import selectors, click the Delete Existing Table Data and Replace with these New Records option.
4. In the Number of Months to Keep in Journal box, enter the number of months to keep data in the AccountsReceivableJournal. The journal keeps data up to the current date. For example, if you select 12 months, the journal keeps data from the most recent 12 months. ECi recommends that you accept the default of 12 months. Once you make this selection, the system automatically adds and removes records so that the file retains only journals for the time frame specified. Records older than the time frame are added to the AccountsReceivableArchive on a daily basis.
5. Click Process. The green progress bar appears as the records are processed.
6. When the process is complete, you can import journals to the AccountsReceivableArchive SQL table. Click the down arrow in the Import Records Into box and click the AccountsReceivableArchive option.
7. Click the first All check box to import all sales archive files.

    To import specific files, click the check box next to each file to import.

    If the file to import is not displayed, scroll down in the File Selection box until the Browse For Additional Journal Files link appears. Click this link to mark any journals not shown in the (LA4) list.

Note: If you have not already validated your data, you need to do so before you import. Click the Validate DBF Source Files for Selected Journals link. A window opens so you can validate the journal files you marked.

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8 Select the SQL table for the new records.

- To import the data into a table with previously imported data, click the Append New Records to the Existing Table Data option.
- To import the data into a new table or to replace an existing table with your current import selectors, click the Delete Existing Table Data and Replace with these New Records option.

9 Select the Date Range by which to limit your import.

- To import all invoices, regardless of date, click the Import All Invoices option.
- To import invoices using a date range, click the Only Import Invoices with a Date Between option. Click the down arrow in the From and corresponding To boxes to select the date range for which to place journals in the JournalOrderArchive. You should import journal files older than those imported into AccountsReceivableJournal. Using the example in **Step 4**, you would import journal files older than 12 months.

10 Click Process. The green progress bar appears as the records are processed.

11 When the process is complete, you can import journals to the AccountsReceivableDeposit SQL table. Click the down arrow in the Import Records Into box and click the AccountsReceivableDeposit option.

12 Click the first All check box to import all A/R deposit files.

To import specific files, click the check box next to each file to import.

If the file to import is not displayed, scroll down in the File Selection box until the Browse For Additional Journal Files link appears. Click this link to mark any journals not shown in the (LA4) list.

Note: If you have not already validated your data, you need to do so before you import. Click the Validate DBF Source Files for Selected Journals link. A window opens so you can validate the journal files you marked.

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13 Select the SQL table for the new records.

- To import the data into a table with previously imported data, click the Append New Records to the Existing Table Data option.
- To import the data into a new table or to replace an existing table with your current import selectors, click the Delete Existing Table Data and Replace with these New Records option.

14 Select the Date Range by which to limit your import.

- To import all invoices, regardless of date, click the Import All Invoices option.
- To import invoices using a date range, click the Only Import Invoices with a Date Between option. Click the down arrow in the From and corresponding To boxes to select the date range for which to place journals in the JournalOrderArchive. You should import journal files older than those imported into AccountsReceivableJournal. Using the example in **Step 4**, you would import journal files older than 12 months.

15 Click Process. The green progress bar appears as the records are processed.

Importing User Defined Accounts Receivable Journals

You can import specific files into the AccountsReceivableArchive or a user defined SQL table, for example, AccountsReceivable2005.

1 In the Import Data window, click the Accounts Receivable Journal Import tab. Click the down arrow in the Import Records Into box and click the User Defined option.

2 When the Journal Import Table Name Entry Form opens, enter the suffix of the journal to import and click OK. For example, you might name this AccountsReceivable2005. In this example, AccountsReceivable is the default and you enter the suffix of 2005 in this box.

3 Click the first All check box to import all A/R journal files.

To import specific files, click the check box next to each file to import. All accounts receivable journals listed in the (LA4) screen are displayed here.

If the file to import is not displayed, scroll down in the File Selection box until the Browse For Additional Journal Files link appears. Click this link to mark any journals not shown in the (LA4) screen list.

Note: If you have not already validated your data, you need to do so before you import. Click the Validate DBF Source Files for Selected Journals link. A window opens so you can validate the journal files you marked.

---

4 Select the SQL table for the new records.

- To import the data into a table with previously imported data, click the Append New Records to the Existing Table Data option.

- To import the data into a new table or to replace an existing table with your current import selectors, click the Delete Existing Table Data and Replace with these New Records option.

5 In the Number of Months to Keep in Journal box, enter the number of months to keep data in the AccountsReceivableJournal. The journal keeps data up to the current date. For example, if you select 12 months, the journal keeps data from the most recent 12 months. ECi recommends that you accept the default of 12 months. Once you make this selection, the system automatically adds and removes records so that the file retains only journals for the time frame specified. Records older than the time frame are added to the AccountsReceivableArchive on a daily basis.

6 Click Process.

Deleting User Defined Accounts Receivable Journals

You can delete user defined table groups.

1. In the Import Data window, click the Accounts Receivable Journal Import tab.
2. Click the down arrow in the Import Records Into box and select the user defined accounts receivable table.
3. Click Delete This Table Group (to the right of the Import Records Into box).
4. The Delete Table Group dialog box opens. Click Yes to delete the selected table group. Click No to not delete the selected table group.

Scheduling Imports

Scheduling imports varies from dealer to dealer. This window lets you validate and import your data for use with the new SQL databases, including the re-designed Furniture Project Management window, Customer Price Plans, Price Modeling, and SQL Reporting. Before scheduling imports, you should review your business processes so that you can make informed decisions about when and how to schedule imports. For example, consider how often you make database changes. Then you can decide how often to schedule a customer or vendor import.

It's important that you initially do a full import. After you've imported data for the first time, you can schedule Delta imports. Delta imports allow you to make frequent updates of the SQL tables without impacting your system resources. However, ECi recommends that you run a full import daily for sales order detail, purchase order detail, and accounts receivable. Full imports should be run weekly for database, i.e. customers, items, vendors, and so on.

Using the Schedule Imports feature, you can specify that the system update your databases according to a set time and day. The system defaults to import daily between the hours of 8:00 am to 5:00 pm. You can add a new schedule, edit an existing one, or delete an existing schedule.

1. Click the Schedule Imports button.

2. To add a new schedule, edit an existing schedule, or delete a schedule, right-click the schedule to change and select the appropriate option. To add or edit a schedule, go to **Step 3**.

   If you select Delete Schedule, the schedule is immediately deleted with no warning.

3. The Import Schedule Setup dialog box opens, shown in Figure 9. You can change the Schedule Properties, Frequency, Daily Frequency, and Duration settings.

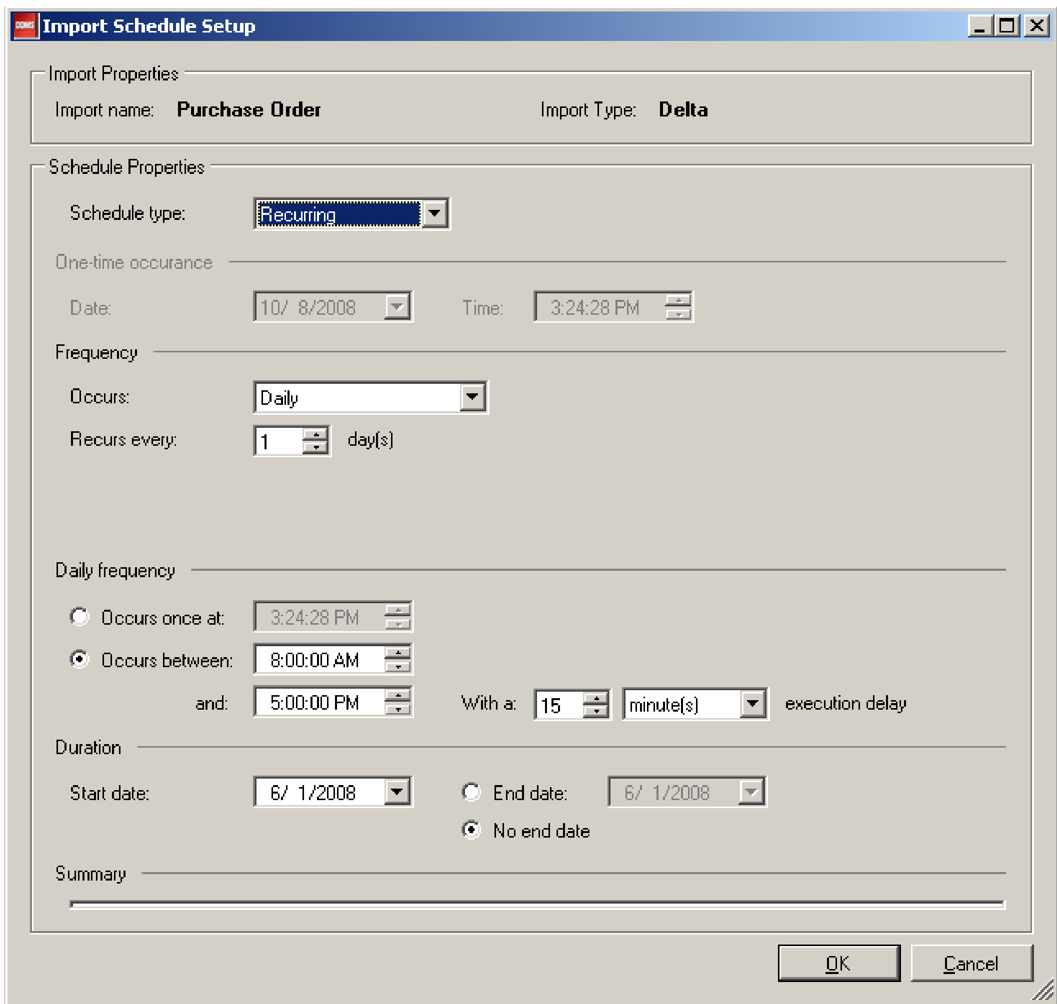


Figure 9: The Import Schedule Setup Dialog Box

3.1 In the Schedule Type box, use the drop down arrow to select One Time or Recurring. If you selected Recurring, go to **Step 3.3**.

3.2 If you selected On Time, all you have to do here is set the date and time for the event. Click the drop down arrow in the Date box to select the date to run the event. Use the drop down arrow in the Time box to select the time to run this event. Go to **Step 4**.

3.3 If you selected Recurring, you must set the frequency for this event. In the Occurs box, use the drop down arrow to select daily, weekly, or monthly.

3.4 The Recurs Every box changes depending on what you selected in the Occurs box. For example, if you selected Daily, use the drop down arrows to select how many days to run the event.

If you selected Weekly, you can select which weeks to run the event as well as the day of the week on which to run the event. For example, you might select to run the event every two weeks on Friday. In this case, select 2 in the Recurs Every box and click Friday.

If you selected Monthly, you select which day of which month to run the event.

3.5 Next, you set up Daily Frequency. You can choose to have the event occur once daily at a specific time by clicking Occurs Once At. Then select the time using the drop down arrows.

You can select Occurs Between. You would select the beginning time in the first time boxes and the ending time in the second set of boxes. Then you can set the execution delay time by entering either a number of minutes or a number of hours.

3.6 Set up the event Duration. Use the drop down arrow to set the Start Date. Then either select the End Date or No End Date.

3.7 When finished, click OK. To not create or edit a schedule, click Cancel.

Note: Remember when setting up schedules that you can select to execute import schedules parallel or sequentially from the Options menu. Sequential execution is the default and the recommended method to use. For more information on the Options menu, refer back to the heading **Using the EBS SQL Import Program**.

---

4 Once you set up schedules, you must click Start Scheduler Engine to start the program. Once done, you can click Stop Scheduler Engine to disable schedules, if needed. Once you start running schedules, you should not close the EBS SQL Import Control Panel. You can click the X in the upper right corner to minimize the window.

Note: A status bar displays at the bottom of the window that allows you to start or stop SQL. The SQL Status Running message is displayed when SQL is active. To stop SQL, click the arrow and select Stop the ECi SQL Service. *However, you should not stop the service unless it is required for IT maintenance.*

Current Activity

Current Activity allows you to view the status of events.

1 Click Current Activity.

2 You can view the name of the event, the next scheduled run time, last run time, and average duration of run time.

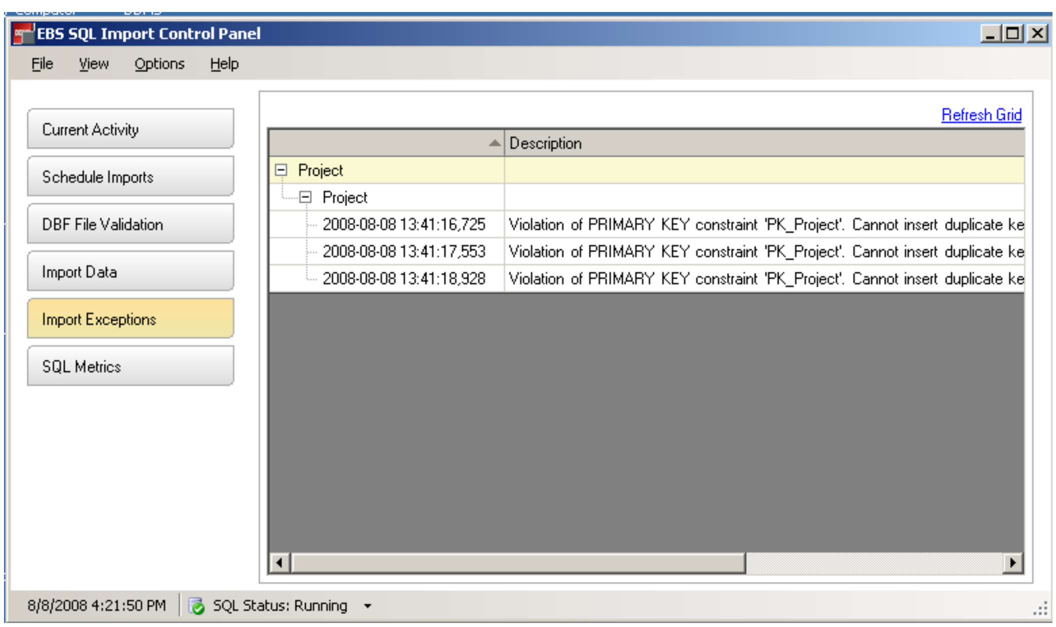
Viewing Import Exceptions

ECi recommends that you periodically check for exceptions that may occur during scheduled imports.

1 During the import process, you can click the Import Exceptions button to view a list of exceptions that can occur.

2 Exceptions and their corresponding descriptions appear in columns. See Figure 10. Click + (plus sign) to expand the information.

Figure 10: Viewing Import Exceptions



To correct common errors, refer to the *Troubleshooting DDMS SQL Validation Errors* handout on our web site at http://www.ddms.com/support/faq/utilities.htm. If you need further assistance, contact ECi support for assistance.

3 To update the page, click Refresh Grid.

Viewing the Event Log

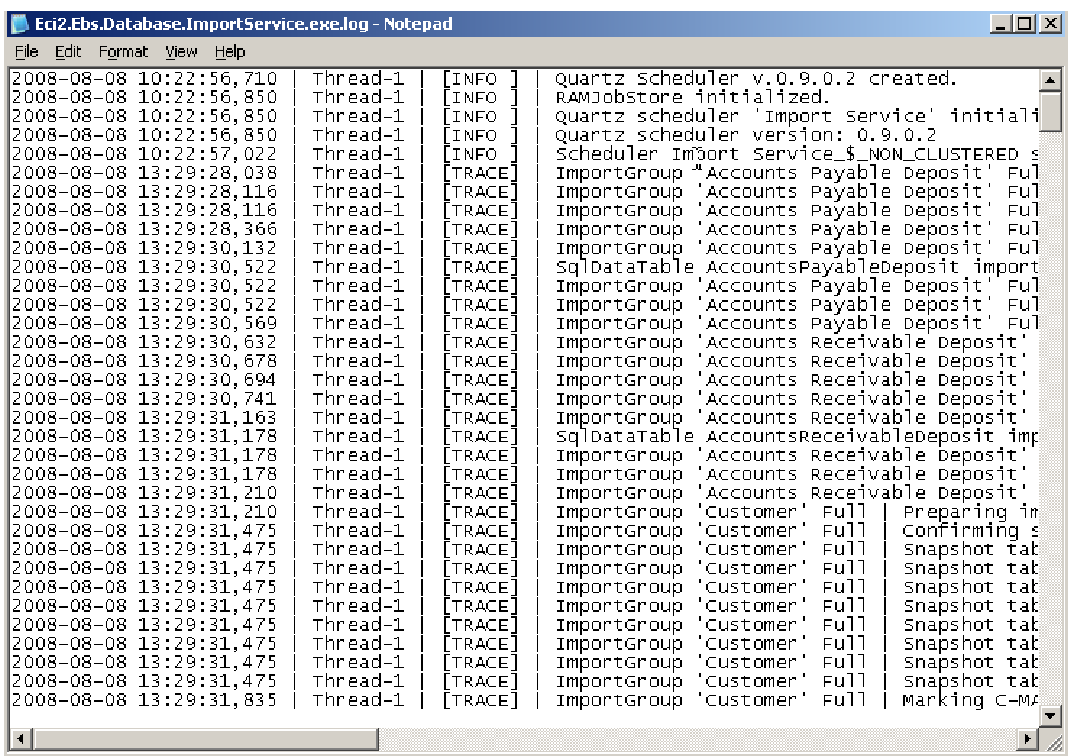
You can use the event log to view previous events in the EBS SQL Import Panel.

1 Click the View menu and click Import Control Panel Log File.

2 Scroll through the event log to locate the event to view, shown in Figure 11.

Note: You can view the event log and run the connectivity test on both the client and the server.

Figure 11: Viewing the Event Log


Eci2.Ebs.Database.ImportService.exe.log - Notepad

File Edit Format View Help

```
2008-08-08 10:22:56,710 | Thread-1 | [INFO ] | Quartz Scheduler v.0.9.0.2 created.
2008-08-08 10:22:56,850 | Thread-1 | [INFO ] | RAMJobStore initialized.
2008-08-08 10:22:56,850 | Thread-1 | [INFO ] | Quartz scheduler 'Import Service' initiali
2008-08-08 10:22:56,850 | Thread-1 | [INFO ] | Quartz scheduler version: 0.9.0.2
2008-08-08 10:22:57,022 | Thread-1 | [INFO ] | Scheduler Import Service_$_NON_CLUSTERED s
2008-08-08 13:29:28,038 | Thread-1 | [TRACE] | ImportGroup 'Accounts Payable Deposit' Ful
2008-08-08 13:29:28,116 | Thread-1 | [TRACE] | ImportGroup 'Accounts Payable Deposit' Ful
2008-08-08 13:29:28,116 | Thread-1 | [TRACE] | ImportGroup 'Accounts Payable Deposit' Ful
2008-08-08 13:29:28,366 | Thread-1 | [TRACE] | ImportGroup 'Accounts Payable Deposit' Ful
2008-08-08 13:29:30,132 | Thread-1 | [TRACE] | ImportGroup 'Accounts Payable Deposit' Ful
2008-08-08 13:29:30,522 | Thread-1 | [TRACE] | SqlDataTable AccountsPayableDeposit import
2008-08-08 13:29:30,522 | Thread-1 | [TRACE] | ImportGroup 'Accounts Payable Deposit' Ful
2008-08-08 13:29:30,522 | Thread-1 | [TRACE] | ImportGroup 'Accounts Payable Deposit' Ful
2008-08-08 13:29:30,569 | Thread-1 | [TRACE] | ImportGroup 'Accounts Payable Deposit' Ful
2008-08-08 13:29:30,632 | Thread-1 | [TRACE] | ImportGroup 'Accounts Receivable Deposit'
2008-08-08 13:29:30,678 | Thread-1 | [TRACE] | ImportGroup 'Accounts Receivable Deposit'
2008-08-08 13:29:30,694 | Thread-1 | [TRACE] | ImportGroup 'Accounts Receivable Deposit'
2008-08-08 13:29:30,741 | Thread-1 | [TRACE] | ImportGroup 'Accounts Receivable Deposit'
2008-08-08 13:29:31,163 | Thread-1 | [TRACE] | ImportGroup 'Accounts Receivable Deposit'
2008-08-08 13:29:31,178 | Thread-1 | [TRACE] | SqlDataTable AccountsReceivableDeposit imp
2008-08-08 13:29:31,178 | Thread-1 | [TRACE] | ImportGroup 'Accounts Receivable Deposit'
2008-08-08 13:29:31,178 | Thread-1 | [TRACE] | ImportGroup 'Accounts Receivable Deposit'
2008-08-08 13:29:31,210 | Thread-1 | [TRACE] | ImportGroup 'Accounts Receivable Deposit'
2008-08-08 13:29:31,210 | Thread-1 | [TRACE] | ImportGroup 'Customer' Full | Preparing im
2008-08-08 13:29:31,475 | Thread-1 | [TRACE] | ImportGroup 'Customer' Full | Confirming s
2008-08-08 13:29:31,475 | Thread-1 | [TRACE] | ImportGroup 'Customer' Full | Snapshot tak
2008-08-08 13:29:31,475 | Thread-1 | [TRACE] | ImportGroup 'Customer' Full | Snapshot tak
2008-08-08 13:29:31,475 | Thread-1 | [TRACE] | ImportGroup 'Customer' Full | Snapshot tak
2008-08-08 13:29:31,475 | Thread-1 | [TRACE] | ImportGroup 'Customer' Full | Snapshot tak
2008-08-08 13:29:31,475 | Thread-1 | [TRACE] | ImportGroup 'Customer' Full | Snapshot tak
2008-08-08 13:29:31,475 | Thread-1 | [TRACE] | ImportGroup 'Customer' Full | Snapshot tak
2008-08-08 13:29:31,475 | Thread-1 | [TRACE] | ImportGroup 'Customer' Full | Snapshot tak
2008-08-08 13:29:31,475 | Thread-1 | [TRACE] | ImportGroup 'Customer' Full | Snapshot tak
2008-08-08 13:29:31,835 | Thread-1 | [TRACE] | ImportGroup 'Customer' Full | Marking C-MA
```

Viewing SQL Metrics

In this window, you can view database and table sizes and table record counts. You can see your database size and keep track of your disk capacity with ease. You can also compact the database (if needed) from this window.

1. Click SQL Metrics to view information. See Figure 12.
2. Click + (plus sign) to the left of each table to view corresponding Row Counts and Size. For example, to view accounts payable metrics, click + to the left of AccountsPayableDeposit column.
3. You can compact your database. Click Compact Database and the This Will Compact the Ensite Database and Truncate All Logs message appears. To continue, click Yes.
4. To update the page, click Refresh Grid.

Figure 12: Viewing SQL Metrics