

Export/Import functionality in the PCT-SAFE File Manager

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1. Introduction: What is the purpose of the Export/Import functionality within the PCT-SAFE File Manager?

PCT-SAFE Software is for local use only and should not be installed on a network. Therefore, it has been necessary to develop an Export/Import functionality that allows for PCT-SAFE data sharing.

This approach also provides the possibility for creating back up files of essential PCT-SAFE data, facilitating recovery in the event of data loss.

This functionality also allows for the transfer of data, in the case of the Address Book, not only between two PCT-SAFE installations/users but also between PCT-SAFE and an external program (for example, MS Excel, MS Outlook) that supports the export/import of data from a text file in the Comma Separated Values (CSV) format. The CSV file format being commonly used for this purpose.

To summarize, the objective of the Export/Import functionality is:

- to allow PCT-SAFE Form and Address Book data transfer between two different PCT-SAFE users;
- to allow bi-directional Address Book data transfer between PCT-SAFE and an external program (e.g. MS Excel, MS Outlook); and
- to allow for the creation of a backup copy of essential PCT-SAFE data (Forms, Applications, Templates and Address Book contents) on an external medium and its recovery in the event of data loss.

2. The Export/Import functionality in brief

Essentially, the Export of forms consists of two functions:

- selection of particular forms or folders to be exported to a file; and
- creation of a file containing all form data.

For the Address Book, however, it is only possible to export the whole Address Book, without the possibility of selecting particular address records.

An Export file can be saved to a network or local drive from where it can be copied to another computer. This allows the exported data to be imported by another PCT-SAFE user, or allows for centralized backup storage providing the possibility of data recovery later on.

The Import (recovery) process is the opposite of the Export, i.e. the data contained in the export file becomes an input which is processed in the PCT-SAFE software.

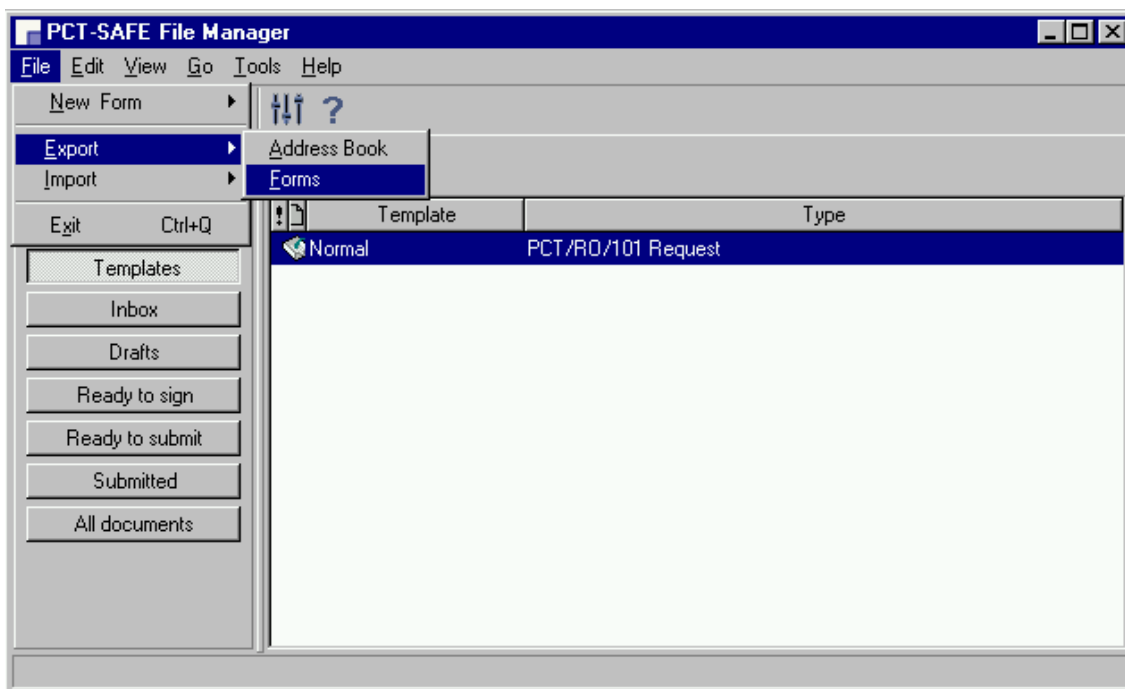
Please note that after being created, an export file is independent of the source PCT-SAFE software and its improper use can cause a data security hazard or corruption in the internal record keeping. The proper use of export files should be ensured by organizational means.

3. Data formats

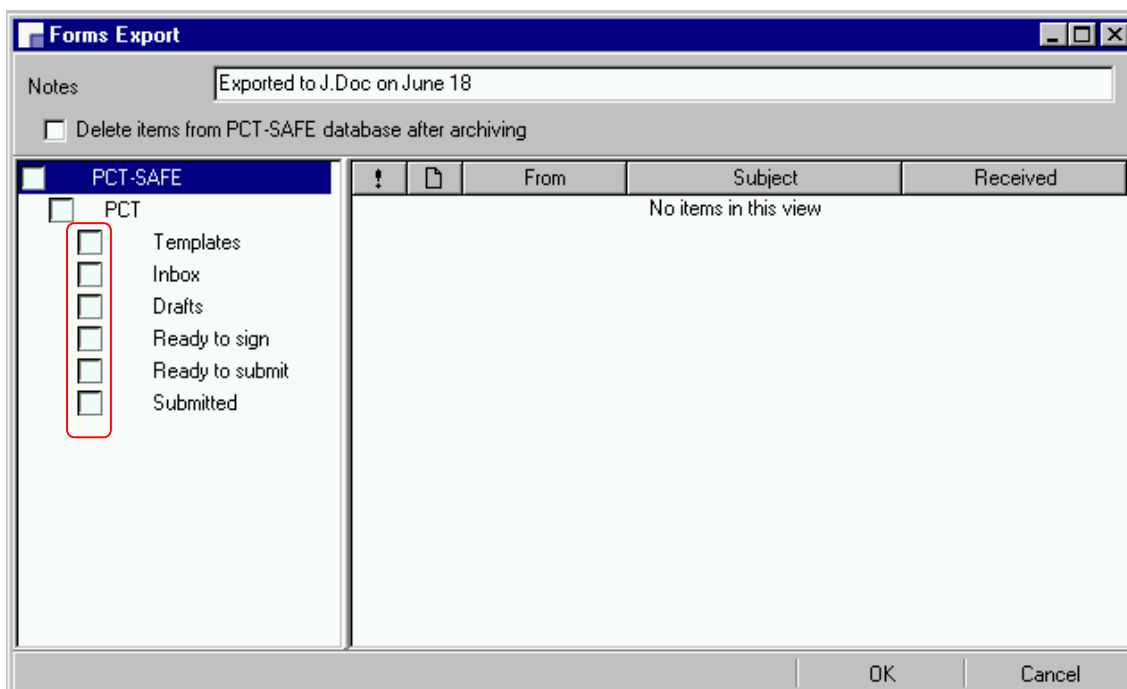
The export file for Form data is represented in an internal format and includes information not only about the contents of forms, but also about their status (i.e. about which Form folder each form belongs to). It can only be read and processed by the PCT-SAFE File Manager. The Forms export file has an extension **.EZF**

The resulting file for the Address Book Export is represented as a flat text file in the **CSV** format and can be imported both into PCT-SAFE and a third-party software product that supports the CSV format. In the case of Address Book data transfer from/to a third party software the user should associate each field within the CSV file with the corresponding field in the receiving system. In the case of Address Book data transfer between two PCT-SAFE installations the fields within the CSV file are already mapped to the corresponding fields within the destination system by default. A CSV file has an extension **.CSV**

4. PCT-SAFE Forms Export



When the 'Export -> Forms' option is selected from the *File* menu in the File Manager, the "Forms Export" dialog appears which allows the selection of forms or folders to be exported to an arbitrary external destination.



The "Forms Export" dialog box represents the tree of the Forms folders in the left panel and the list of forms in the selected folder in the right panel. The user can select one, several or all folders to be copied into the export file by checking the corresponding folder checkbox. In order to export the whole contents of all folders the user can simply select the upper level folder, the PCT or PCT-SAFE checkboxes. Please note that as long as one or more folders are selected for the export, the whole contents of the selected folders are exported.

Alternatively, the user can choose one or more individual forms to be exported, but only from within the same folder. In this case no multiple folder selection is possible. Please do the following to select one or more forms for export:

- uncheck all of the Folder checkboxes in the left panel,
- go to the desired lowest level Folder containing the forms to be exported. The whole contents of the selected folder will be listed in the right panel,
- select the form(s) to be exported. If you would like to select multiple forms within the right panel, maintain Ctrl key pressed while selecting all desired forms with the mouse.

Additionally, it is possible to add a comment to the resulting export file in the upper edit field. By checking the checkbox "Delete items from PCT-SAFE database after archiving", it is possible to request the File Manager to delete all exported forms after the export is complete.

Warning. Please use this delete option with care, especially if the whole contents are to be exported. A safer alternative is to create an export file and then delete the corresponding forms manually.

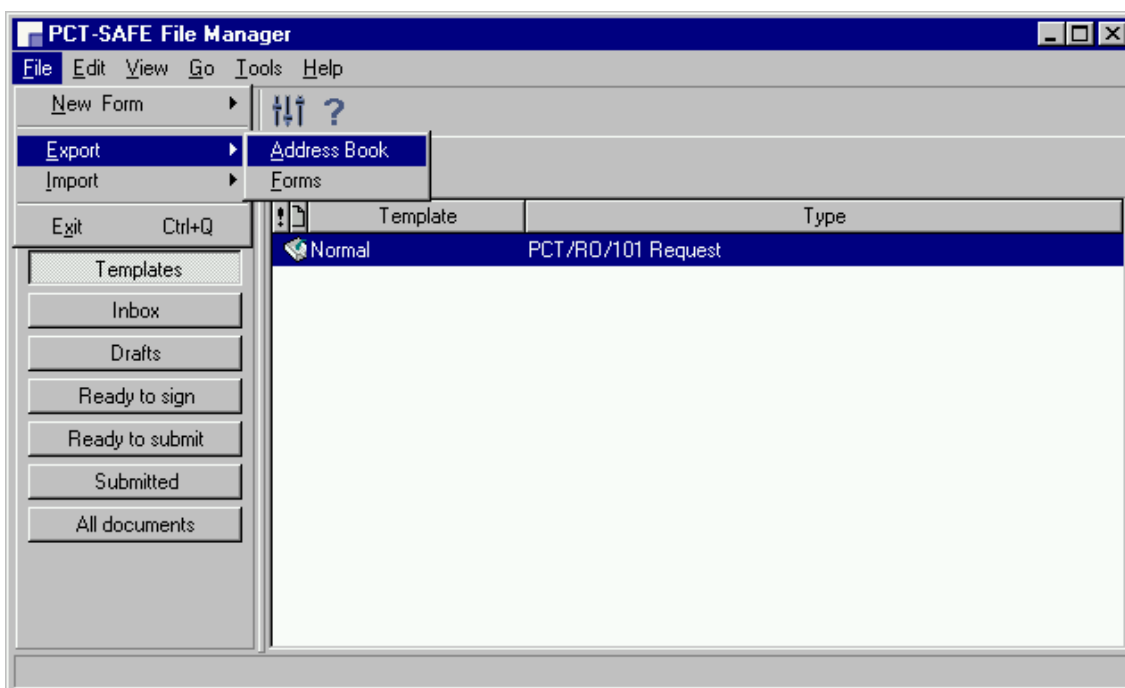
After all necessary selections have been made, click the **OK** button in order to proceed. The “*Save File*” dialog box appears. Choose the destination of the resulting Export file and provide the file with a name (the file name by default is the creation timestamp of the format *YYYYMMDD_HHMMSS*). The extension *.EZF* cannot be changed.

Note. This functionality allows the export of user defined Templates along with Forms. However, it is impossible to export predefined *Normal* Template from the ‘*Templates*’ folder.

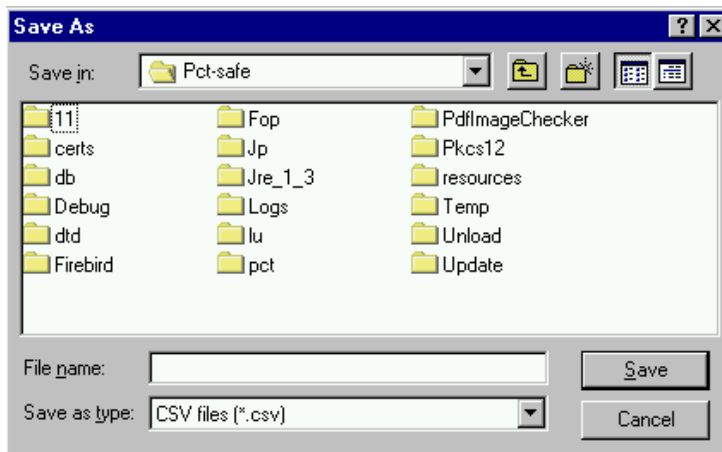
4.1. Form Export and User Management

The user is only able to export forms to which he has full access. Any form having read-only access are skipped from the export process.

5. PCT-SAFE Address Book Export

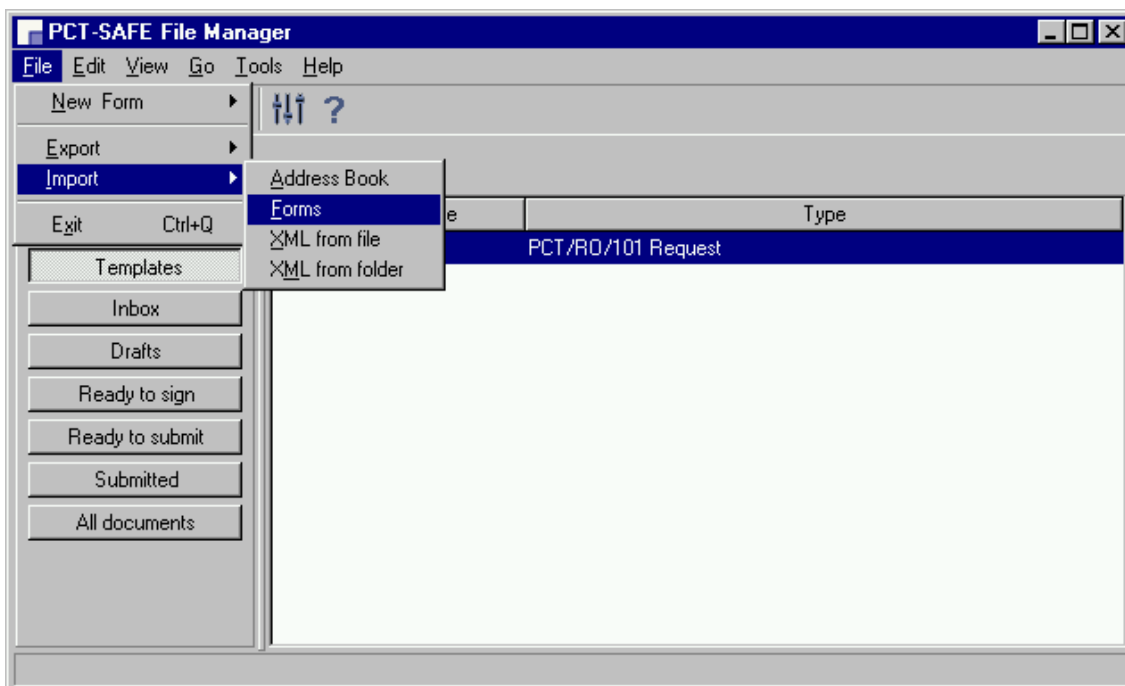


The PCT-SAFE Address Book can only be exported as a whole. When the ‘*Export -> Address Book*’ option from the *File* Menu in the File Manager is selected, the ‘*Save File*’ dialog box appears.

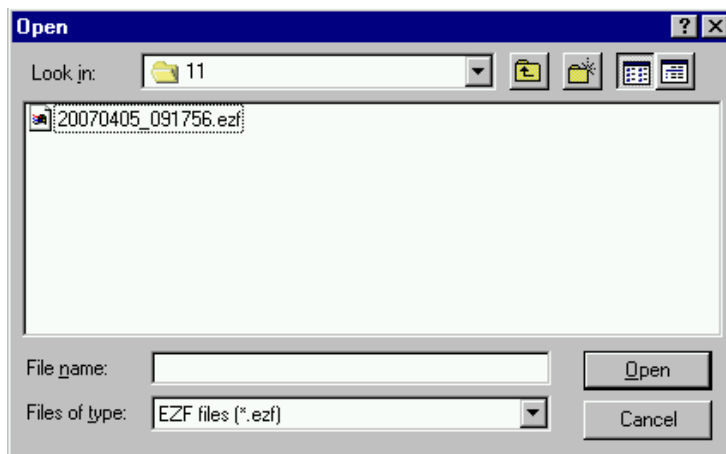


The user needs to specify the destination and the name of the export file. After the 'Save' button is clicked, the Address Book export is performed.

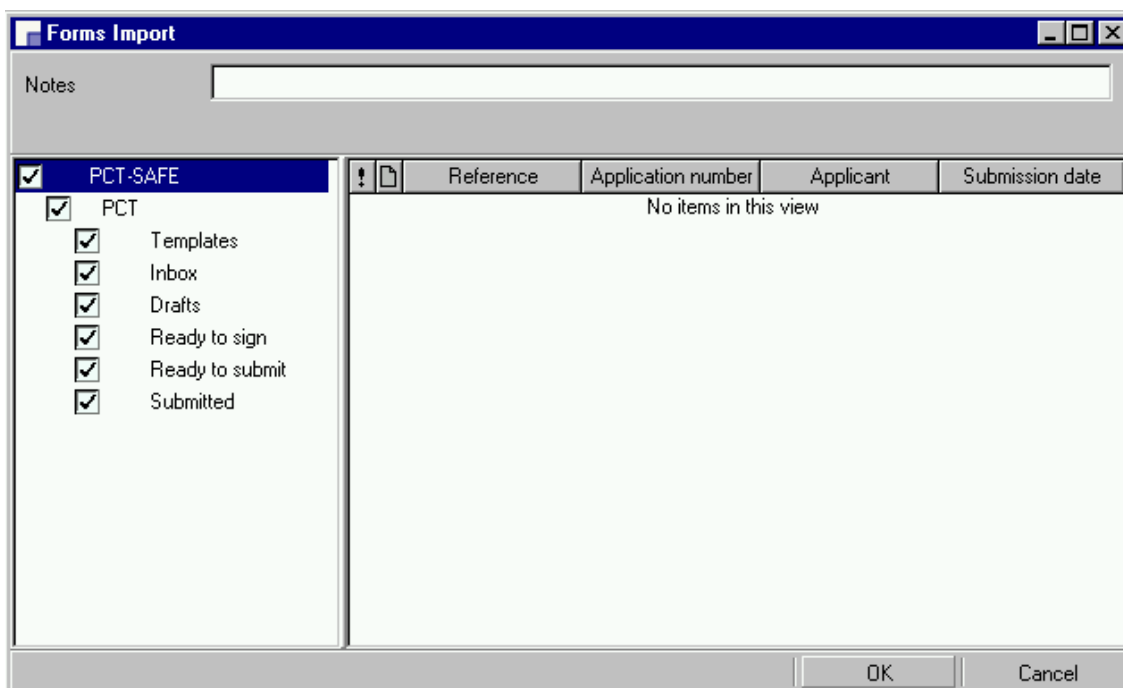
6. PCT-SAFE Forms Import



As the first step in the forms import process the user should choose the file from where the forms are to be imported:



The selected EZF file is then read by the File Manager and the following *'Forms Import'* dialog, similar to the *'Forms Export'* dialog, appears.



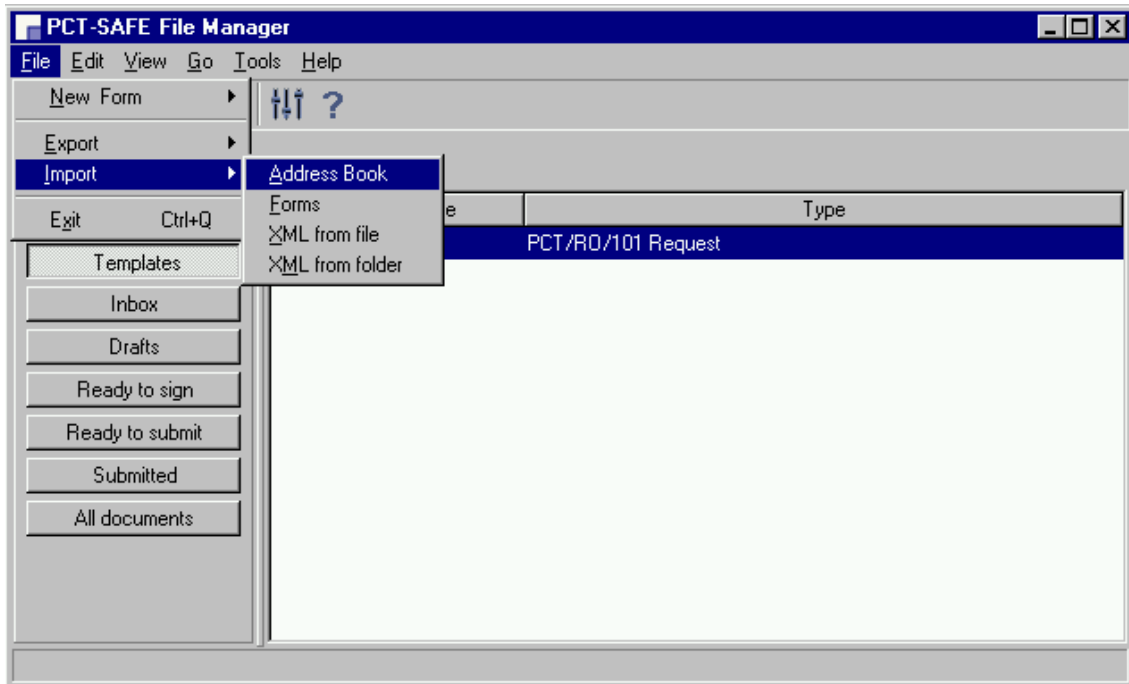
In the same way as the *'Form Export'* dialog, this dialog allows the selection of one or more folders OR one or more forms within one folder for import. It is not possible to make multiple form selections within different folders simultaneously. Please select the topmost checkbox to import the whole contents of the export file into the system.

Should a form being imported have the same *Agent's or Applicant's File Reference* as a form which already exists in the destination folder (there can be only one form having the same file reference within one folder), a dialog box appears for the user to choose whether to skip the import of the form or to overwrite the existing form.

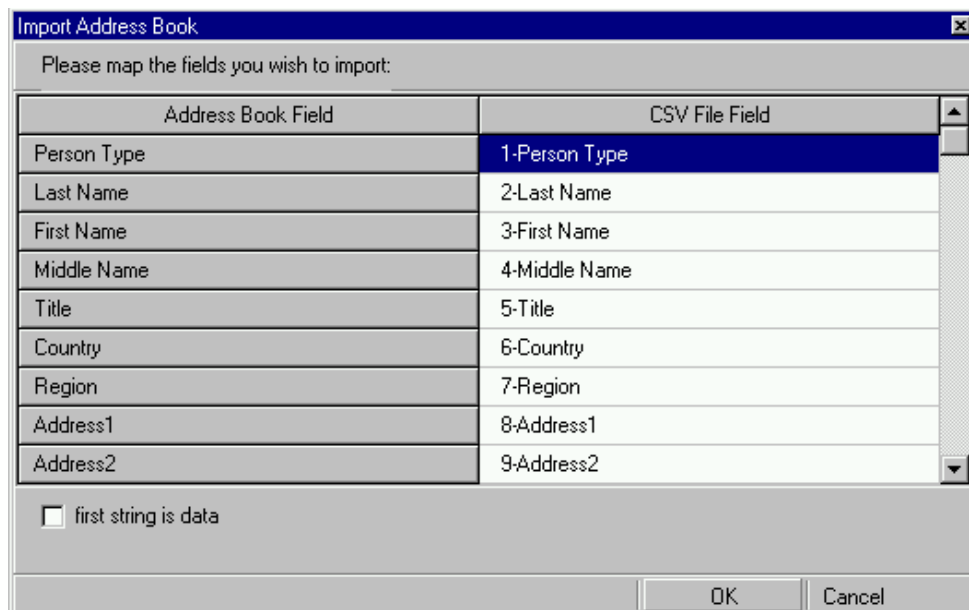
6.1. Forms Import and User Management

There is no owner information stored in the import file. The user who is uploading forms from the import file automatically becomes the owner of all forms he uploads. Should a *File reference / Folder* collision occur between an uploaded form and a form the user does not have full access rights to, the corresponding form is skipped from being uploaded.

7. Address Book Import



When the *'Import -> Address Book'* option from the *File* Menu in the File Manager is selected, a *'Select file'* dialog appears to select the CSV source file. Once the source file has been selected the CSV Import dialog box appears:



The left static column lists all internal fields of the Address Book, whereas the right column defines which field of the input CSV file should be mapped to each particular internal Address Book field.

The Address Book import routine tries to bind corresponding fields automatically. For this purpose, it goes through the CSV file and searches for all CSV fields the names of which are the same as internal Address Book fields. Should such a name be found, it is mapped automatically to the corresponding field in the left column. Obviously, in the case the CSV file was created by PCT-SAFE, all fields will be mapped properly by default.

If the import routine is unable to find a field within the CSV file having the same name as an internal Address Book field, it sets the default mapping value to 'None', which means that this field is omitted by the CSV data import.

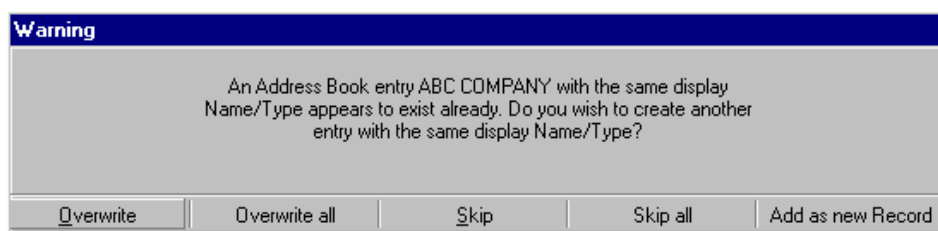
For all fields that do not comply with any Address Book field by their name, and for all fields that accidentally have the same name but a different meaning, the user should perform mapping manually, by selecting each field and choosing an appropriate CSV field name from the checkbox.

Please note that at least the *Last Name* and *First Name* fields for individuals, or *Company* name field should be filled for the successful addition of a new entry into the Address Book. Therefore at least one of these fields should be mapped to enable the Address Book import. Furthermore, during the import all records that do not have at least one of these two fields filled in cannot be processed and are skipped from the import process.

The checkbox option '*first string is data*' is present in the dialog for CSV-compatibility to some external programs and means that the first string that usually represents names of CSV fields should be imported as data. This option should usually be unchecked.

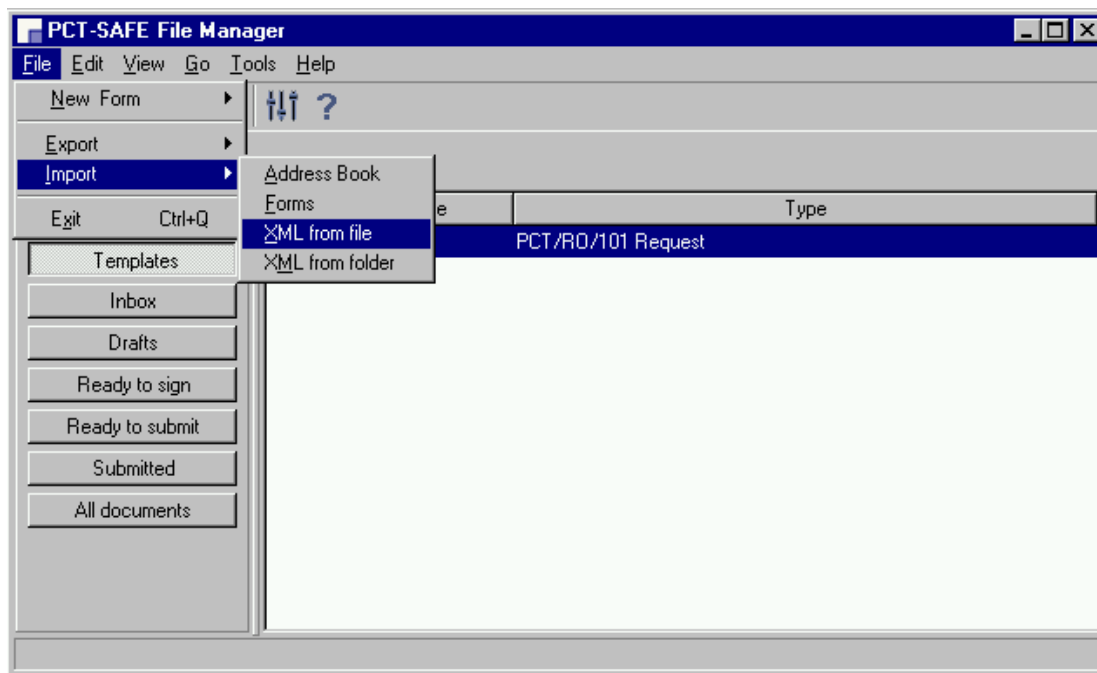
The CSV file is imported after the **OK** button is clicked.

If a record being imported has the same name and type (legal or natural person) as a record already present in the Address Book, the user is given the possibility to skip the record, to overwrite the existing one or to add the record along with the existing one:



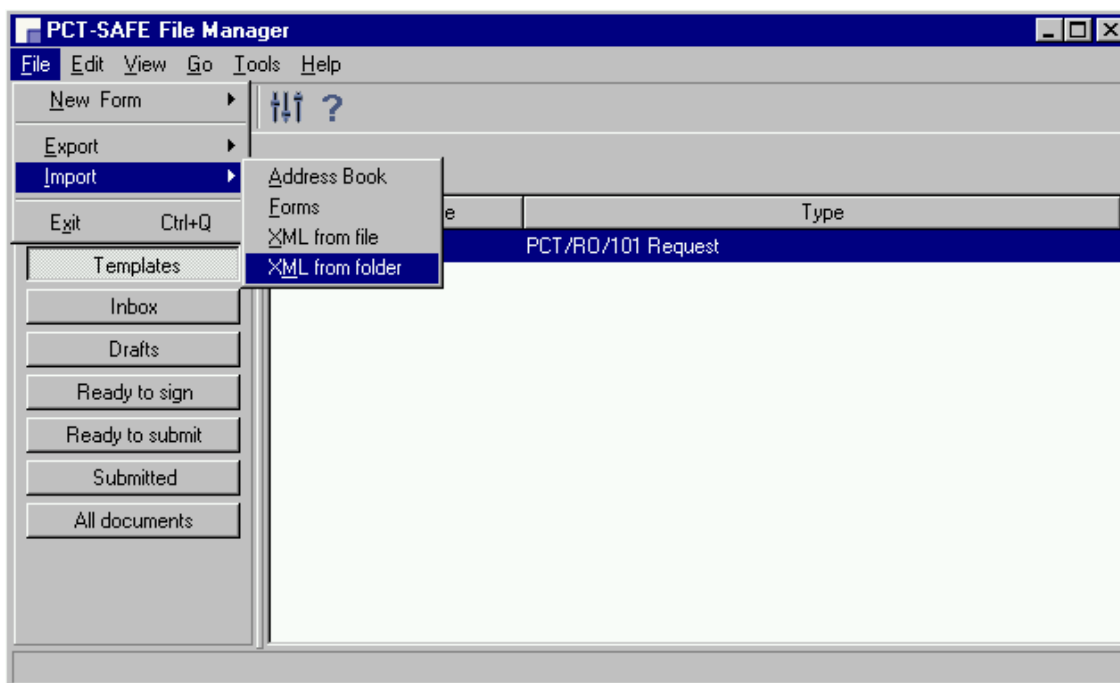
Note. In the event that the input CSV file was produced by a third party software (such as MS Outlook), it is very likely that some essential information (e.g. the indication whether the person is a legal entity or a natural person) will not be present or will be present in an inappropriate form. The CSV import routine makes some assumptions based on contents of other fields to fill in missing information. As these assumptions can occasionally be incorrect, it is recommended to go through all newly imported Address Book contents and to make any necessary corrections after the CSV import has been performed.

8. XML import from file



This feature is for importing existing request form or application data in XML format to PCT-SAFE, as a .zip file.

9. XML import from folder



This feature is for importing existing request form or application data in XML format to PCT-SAFE from a folder, as non-compressed files.

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