maxgeo

DataShed Import Layouts

Quick Guide

September 2021

Contents

Version History

Version	Date	Person	**File Name**
1.0	Sept 2021	R Adriano	DataShedImportLayouts_QuickGuide

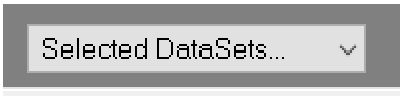
1.0 Overview

Using DataShed import layouts, or importing directly into a database on the fly, is relatively straightforward and intuitive in DataShed4. A brief summary of the main features is outlined below.

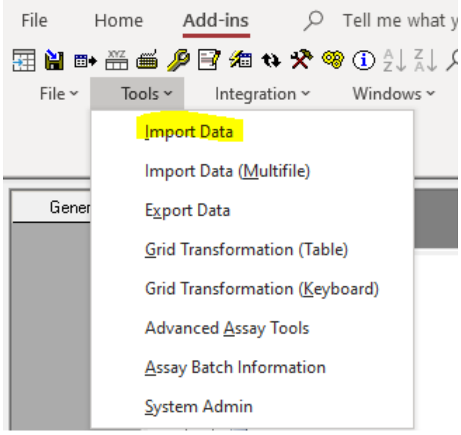
This document describes what to check for when importing data via DataShed's import layout.

2.0 Importing Data

As a minimum requirement, the user MUST have permission to a DataSet as the DataSet filter cascades for every user operation.



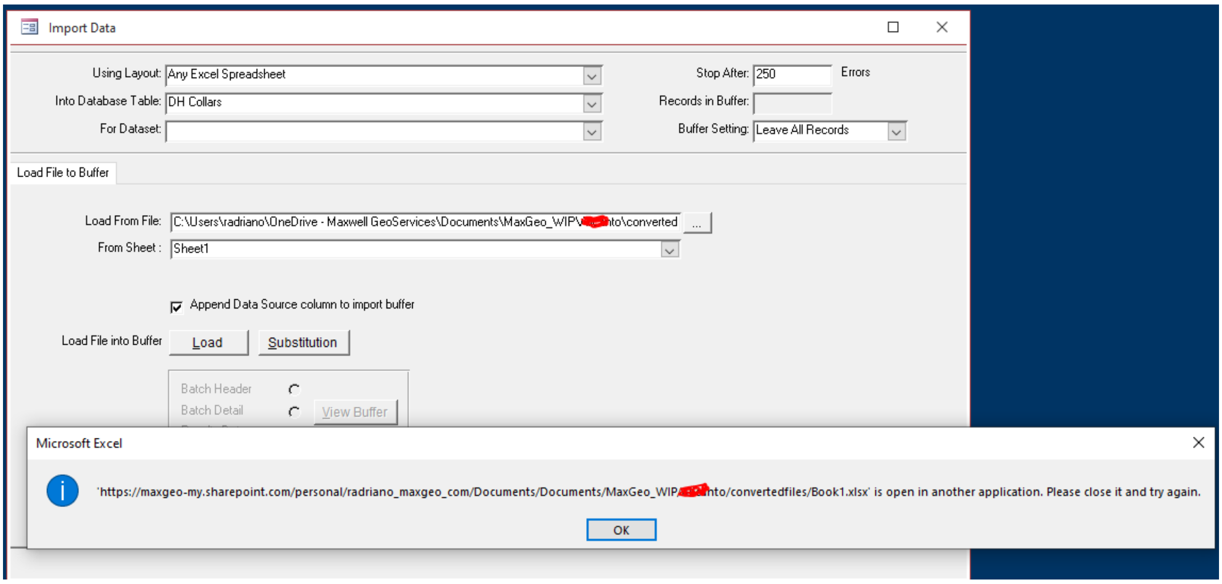
DataShed's Import Data functionality is found in DataShed → Add-ins → Tools → Import Data



2.1. Specify file and destination table

When loading files, DataShed4 requires:

- Exclusive read / write capability to the file to load successfully. Example below shows a file where DataShed is unable to get an exclusive read / write capability.


Import Data

Using Layout: Any Excel Spreadsheet

Into Database Table: DH Collars

For Dataset:

Stop After: 250 Errors

Records in Buffer:

Buffer Setting: Leave All Records

Load File to Buffer

Load From File: C:\Users\radriano\OneDrive - Maxwell GeoServices\Documents\MaxGeo_WIP\[redacted]nto\converted

From Sheet : Sheet1

☑ Append Data Source column to import buffer

Load File into Buffer

Microsoft Excel

'https://maxgeo-my.sharepoint.com/personal/radriano_maxgeo_com/Documents/Documents/MaxGeo_WIP[redacted]nto/convertedfiles/Book1.xlsx' is open in another application. Please close it and try again.

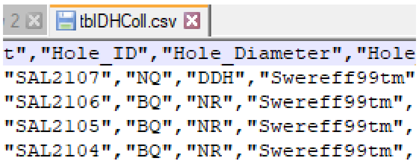
- Correctly formatted file formats
  - CSV: quotes around a record is considered invalid
  - Excel: commas within a cell / record may not import correctly
  - Access: commas within a cell / record may not import correctly

2.2. Viewing Buffer

It is good practice to view the data and confirm that the data loaded is what the user is intending to load.

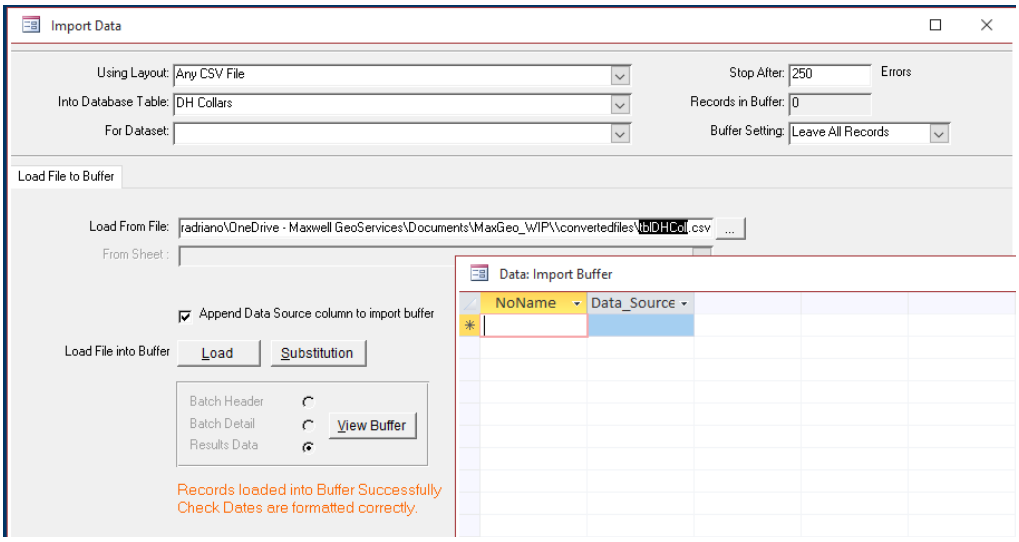
a. Unsuccessful buffer loading CSV Example

In the example below, the CSV have quotes around the records. View Buffer shows the importer has parsed 0 records. The source CSV file prominently features quotes.



2 ☒ tblDHColl.csv ☒

```
t","Hole_ID","Hole_Diameter","Hole
"SAL2107","NQ","DDH","Swereff99tm"
"SAL2106","BQ","NR","Swereff99tm",
"SAL2105","BQ","NR","Swereff99tm",
"SAL2104","BQ","NR","Swereff99tm",
```



Import Data

Using Layout: Any CSV File

Into Database Table: DH Collars

For Dataset:

Stop After: 250 Errors

Records in Buffer: 0

Buffer Setting: Leave All Records

Load File to Buffer

Load From File: radriano\OneDrive - Maxwell GeoServices\Documents\MaxGeo_WIP\\convertedfiles\tblDHCol.csv

From Sheet :

☑ Append Data Source column to import buffer

Load File into Buffer

Batch Header ○

Batch Detail ○

Results Data ●

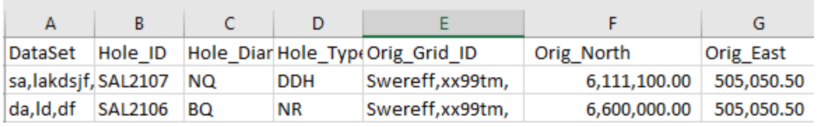
Records loaded into Buffer Successfully
Check Dates are formatted correctly.

Data: Import Buffer

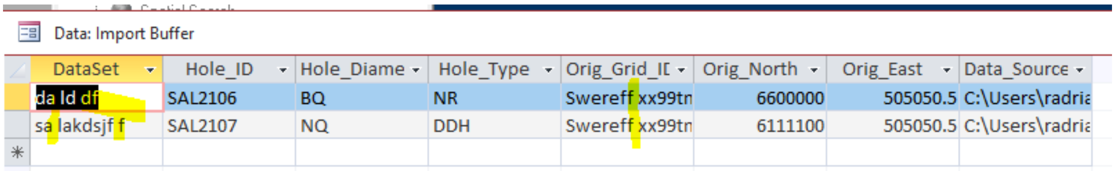
NoName	Data_Source

b. Unsuccessful buffer loading Excel Example

The example below shows substitution of commas to spaces. Though these records can be potentially imported, it is good practice to avoid commas inside records all together.



	A	B	C	D	E	F	G
	DataSet	Hole_ID	Hole_Diar	Hole_Typ	Orig_Grid_ID	Orig_North	Orig_East
	sa,lakdsjf,	SAL2107	NQ	DDH	Swereff,xx99tm,	6,111,100.00	505,050.50
	da,ld,df	SAL2106	BQ	NR	Swereff,xx99tm,	6,600,000.00	505,050.50

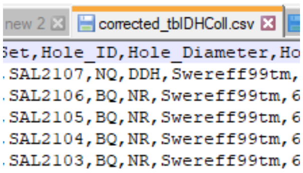


Data: Import Buffer

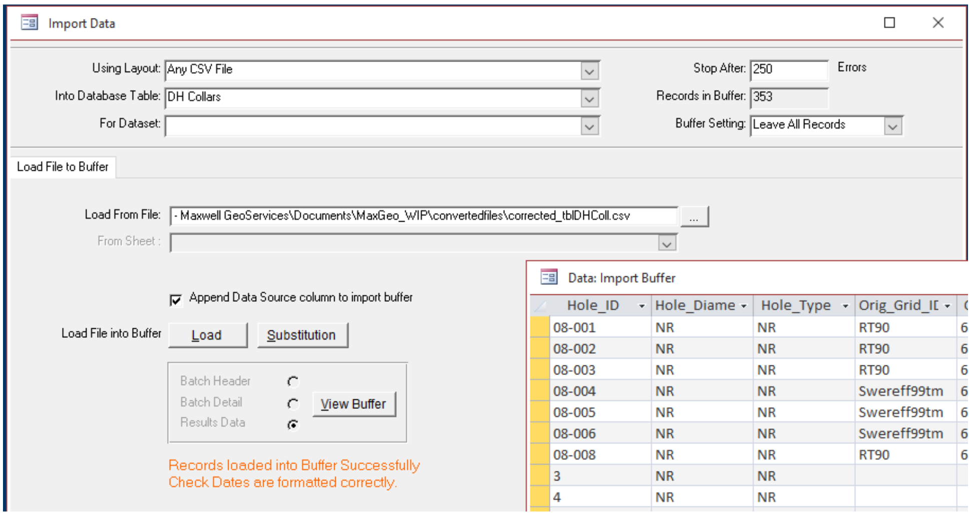
DataSet	Hole_ID	Hole_Diame	Hole_Type	Orig_Grid_IC	Orig_North	Orig_East	Data_Source
da ld df	SAL2106	BQ	NR	Swereff xx99tn	6600000	505050.5	C:\Users\radria
sa lakdsjf f	SAL2107	NQ	DDH	Swereff xx99tn	6111100	505050.5	C:\Users\radria

c. Successful buffer loading CSV Example

In the example below, the CSV has been properly parsed by the importer. The source data has the correct formatting.



```
Set,Hole_ID,Hole_Diameter,Ho
.SAL2107,NQ,DDH,Swereff99tm,
.SAL2106,BQ,NR,Swereff99tm,6
.SAL2105,BQ,NR,Swereff99tm,6
.SAL2104,BQ,NR,Swereff99tm,6
.SAL2103,BQ,NR,Swereff99tm,6
```



Using Layout: Any CSV File
Into Database Table: DH Collars
For Dataset:
Stop After: 250 Errors
Records in Buffer: 353
Buffer Setting: Leave All Records

Load From File: - Maxwell GeoServices\Documents\MaxGeo_WIP\convertedfiles\corrected_tblDHColl.csv
From Sheet :

☑ Append Data Source column to import buffer

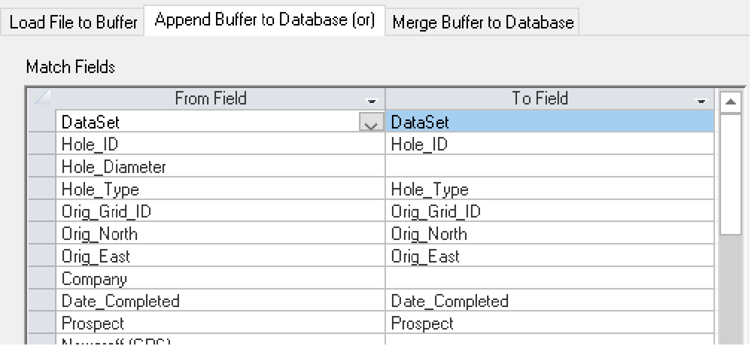
Batch Header ○
Batch Detail ○
Results Data ●

Records loaded into Buffer Successfully
Check Dates are formatted correctly.

Hole_ID	Hole_Diame	Hole_Type	Orig_Grid_IE	C
08-001	NR	NR	RT90	6
08-002	NR	NR	RT90	6
08-003	NR	NR	RT90	6
08-004	NR	NR	Swereff99tm	6
08-005	NR	NR	Swereff99tm	6
08-006	NR	NR	Swereff99tm	6
08-008	NR	NR	RT90	6
3	NR	NR		
4	NR	NR		

2.3. Appending Data

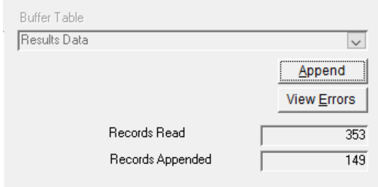
After loading a file to buffer, one of the two new options is “Appending Data”. As the name suggests, this option will only attempt to insert the records that is loaded in the buffer. Existing records will NOT be affected in this option. As shown in the screenshot below, the importer automatically maps the source column and the destination column where the names match.



Match Fields

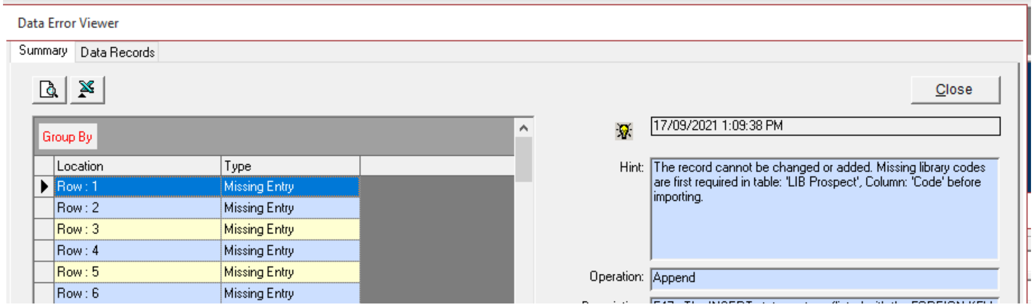
From Field	To Field
DataSet	DataSet
Hole_ID	Hole_ID
Hole_Diameter	
Hole_Type	Hole_Type
Orig_Grid_ID	Orig_Grid_ID
Orig_North	Orig_North
Orig_East	Orig_East
Company	
Date_Completed	Date_Completed
Prospect	Prospect

After mapping all the available fields, select “Append”. In the example below, there were 353 records in the buffer but only 149 records were inserted in the database (204 rejected). Click “View Errors” to interrogate the reason for the records being rejected.



Buffer Table: Results Data
Records Read: 353
Records Appended: 149

In this example, the rejected records have missing libraries in LIB Prospect.



Location	Type
Row : 1	Missing Entry
Row : 2	Missing Entry
Row : 3	Missing Entry
Row : 4	Missing Entry
Row : 5	Missing Entry
Row : 6	Missing Entry

17/09/2021 1:09:38 PM

Hint: The record cannot be changed or added. Missing library codes are first required in table: 'LIB Prospect', Column: 'Code' before importing.

Operation: Append

In addition, it is good practice to Export the rejected records so libraries can be updated, or data can be remediated, ready for import. Typical reasons for rejection:

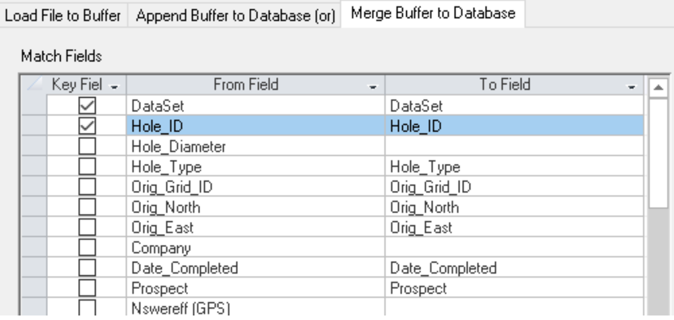
- Missing library codes
- In active library codes
- Duplicate data based on primary keys
- Invalid Depth_From / Depth_To

2.4. Merging Data

Merging data requires good SQL or database schema knowledge because the primary key fields must be defined. As the name suggests, merging data does NOT create new records. This routine updates records based on the defined primary keys.

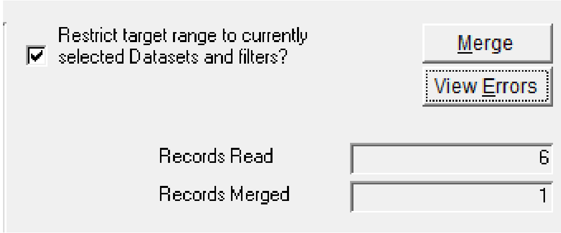
The defined primary key fields will be used as means to identify which records to modify. Improperly defined primary key fields can cause havoc since it could update a record in the database where the user is not intending to.

In the example below, the destination table is tblDHColl (Collar table). The primary key fields for this table are DataSet and Hole_ID.



Key Fiel	From Field	To Field
☑	DataSet	DataSet
☑	Hole_ID	Hole_ID
□	Hole_Diameter	
□	Hole_Type	Hole_Type
□	Orig_Grid_ID	Orig_Grid_ID
□	Orig_North	Orig_North
□	Orig_East	Orig_East
□	Company	
□	Date_Completed	Date_Completed
□	Prospect	Prospect
□	Nswereff (GPS)	

The example below shows 6 records loaded but only one record was updated. Click "View Errors" to interrogate the data further for reasons for the 5 records that did not merge.



☑ Restrict target range to currently selected Datasets and filters?

Records Read 6

Records Merged 1