

## Course Description

### Overview

This course enables users of all levels to understand essential concepts and features required to create and run iBase Import Specifications.

The scenario-driven exercises include example data and instructions on how to create import specifications from scratch or from copies. Users will learn how to standardise data to conform to iBase Pick Lists.

The exercises will introduce how to import from Excel Spreadsheets, Text Files, Folders of Text Files and Folders of Documents/Images.

### Course Objectives

Upon completion of this course, users should be able to:

- Create Single Entity import specifications
- Create Linked Entity import specification
- Use Field Actions to standardise data to conform to iBase requirements:
  - Add Prefix
  - Add Suffix
  - Prefix With Another Column
  - Remove Suffix
  - Find & Replace Text
  - Replace Value
  - Replace from Substitution File
  - Extract Portion Of Text
  - Split Text
  - Trim Characters
- Use Conditions to only apply Field Actions when the data meets the criteria.
  - Length equal to
  - Starts with
  - Does not start with
  - Contains
  - Is Blank
  - Is Not Blank
  - Regular Expression
- Import from various file types:
  - Excel Spreadsheets
  - Text Files
  - Folder of Text Files
  - Folder of Documents (same methodology for Folder of Pictures)

### Intended Audience

This course is suitable for the following audiences:

- iBase Administrators & iBase Designers
- Super Users with import privileges

### Prerequisites

The prerequisites for taking this course are:

- Basic understanding of analytical techniques.
- Q<sup>3</sup>i<sub>2</sub> - IBM9I03G IBM i2 Analyst's Notebook Essentials
- Q<sup>3</sup>i<sub>2</sub> IBM i2 iBase User

### Follow-On Courses

This course is a prerequisite for the following courses:

- Q<sup>3</sup>i<sub>2</sub> - IBM i2 iBase Systems Administrator course

### Course Elements

Exercises in this course are presented using the following elements:

#### Guided Exercises

Raw data is provided and students are guided through the process create the import specifications with detailed step-by-step instructions to import the data.

The exercises include multiple data sets to ensure repetition and thereby reinforce the knowledge of how to create i2 iBase import specifications.

There is one optional revision exercise in the first exercise.

#### Guided Error Handling Exercises

In some cases, the students will be guided towards forcing errors. These are designed to show how to fix the error or record the information a different way.

#### Reinforcement

After learning the basics involved in different functions, students will be asked to use those functions again in subsequent exercises in different ways. This ensures repetition learnt early can be applied again in different circumstances, such as using a Set as the source of a Query or a Report.

### Estimated Training Schedule

**Note:** Course speed will vary depending on individual's computer skills, willingness and prior knowledge so exercises may start / finish either earlier or later than can be anticipated.

#### Day 1

##### 0. Understanding iBase Imports

- Mapping Your Import Specification
- Single Entity Or Links
- Entity Imports
- Link Imports
- Field Actions
- Session Defaults
- Default Time Zone
- Errors
  - No Value Was Specified For The Mandatory Field
  - You Cannot Link An Entity Record To Itself
  - Type Mismatch Date / Time Errors
  - Not In The Defined List Of Values For This Type Errors
  - The Length Of The Field Exceeded Maximum Characters

##### 1. Importing Introduction

**Data Format: Excel Spreadsheet**

**Data: Telephone Calls (Telephone Numbers)**

- Single Entity Imports
  - Mapping The Import Specification
  - Create Single Entity Import Specification
  - Duplicate The Import Specification
- Data Format: Excel Spreadsheet**  
**Data: Telephone Calls (linking Telephone Number to Telephone Number, linking Telephone Numbers to Telecom Activity entity)**
- Linked Entity Imports (Existing Entities)
  - Mapping The Import Specification
  - Create Linked Entity Import Specification
  - Linked Entity Imports (Create Entities & Links)
  - Mapping The Import Specification
  - Create Linked Entity Import Specification
  - Duplicate The Import Specification

##### Optional Revision

**Data Format: Excel Spreadsheet**

**Data: Accounts**

- Single Entity Import
  - Mapping The Single Entity Import Specification
  - Create Single Entity Import Specification
- Data Format: Excel Spreadsheet**  
**Data: Transactions (linking Account to Account, linking both Accounts to Transaction entity)**
- Linked Entity Imports
  - Mapping The Linked Entities (Financial Transactions) Import Specification
  - Create Linked Entity Import Specification
  - Mapping The Linked Entities (Activity) Import Specification
  - Create Linked Entity Import Specification
  - Duplicate The Import Specification

##### 2. Clearing Rows Based On Conditions

**Data Format: Excel Spreadsheet**

**Data: Telephone Calls (linking Telephone Number to IMEI Number when present)**

- Mapping The Linked Entity Import Specification
- Create Linked Entity Import Specification

- Duplicate The Import Specification

### 3. Importing Folder Of Text Files

**Data Format: Folder of Text files (all pipe separated)**

**Data: Passenger Manifests (linking Travel Movement to Person)**

- Mapping The Linked Entity Import Specification
- Create Linked Entity Import Specification

### 4. Import Folder Of Documents / Pictures

**Data Format: Folder of documents**

**Data: Passenger Manifests (add as Document entity)**

- Mapping The Single Entity Import Specification
- Create Single Entity Import Specification
- Data Format: Excel Spreadsheet**
- Data: Passenger Manifest file names and flight details (link imported Documents to Travel Movement record)**
- Mapping The Linked Import Specification
- Create Linked Entity Import