IFS Excel Add-In

User Manual for IFS Data Migration Excel Add-In

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1. IFS Data Migration Excel web Add-In

Overview

IFS Excel Add-In is an extension to the FNDMIG functionality in IFS applications. A migration job with procedure type Excel Migration could be executed through MS Excel and an authorized end user could load / manipulate data in the specific logical units related to the given migration job.

Once a migration job of procedure type Excel Migration is created, configured, and assigned to an end user, the relevant migration job will be visible to the end user once he/she is logged on to IFS Applications from MS Excel through the IFS Excel Add-in. Usually, it is an administrator or an advanced user who will create such a job.

2. User Interfaces

RIBBON
Once installed (manifest is uploaded), the add-in should be displayed in the Home tab as a web Add-In with the name IFS Excel Add-in.
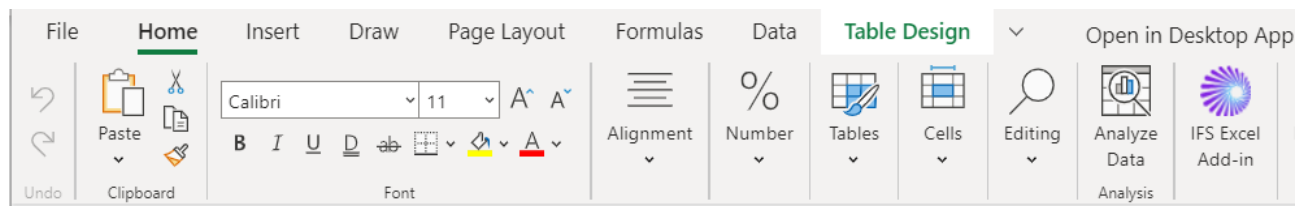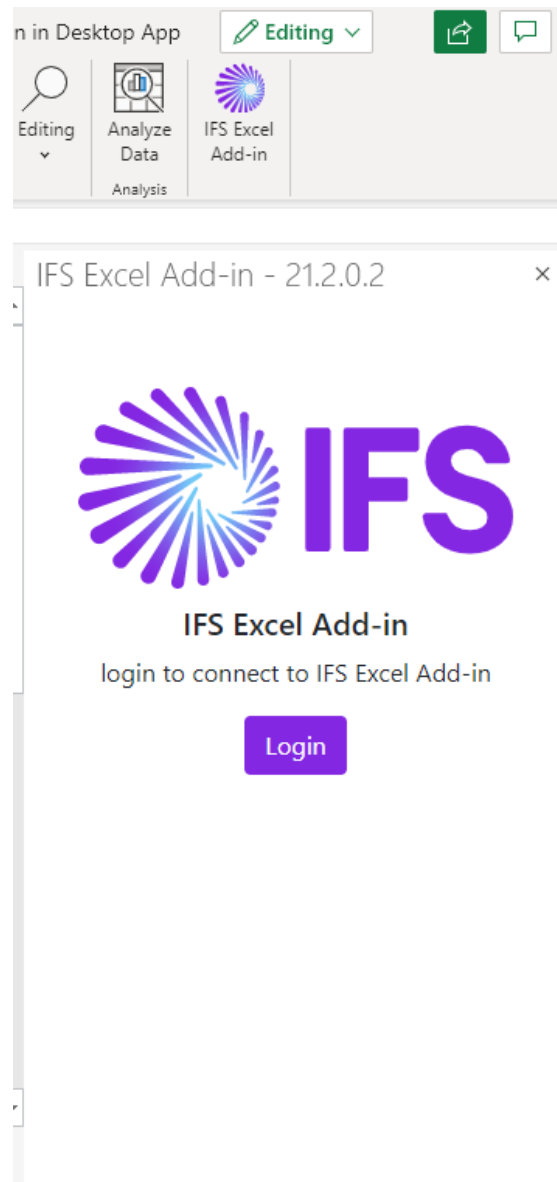

Figure 1 - IFS Excel Add-in Riboon

Figure 2 - IFS Excel Add-in Login

TASKPANE

Once the connecting upon IFS Excel add-in task pane loads as;

1. Name and the current version of the add-in
2. Load Data
   - Loads all data to excel sheet.
3. Validate
   - Validates changes done in Excel migration job.
4. Execute
   - Executes(Insert/Update) data in excel sheet to Aurena client.
5. Logout
   - Logs out the excel add-in.
6. Excel migration job list
   - Excel migration job list assigned to the logged in user in alphabetical order.
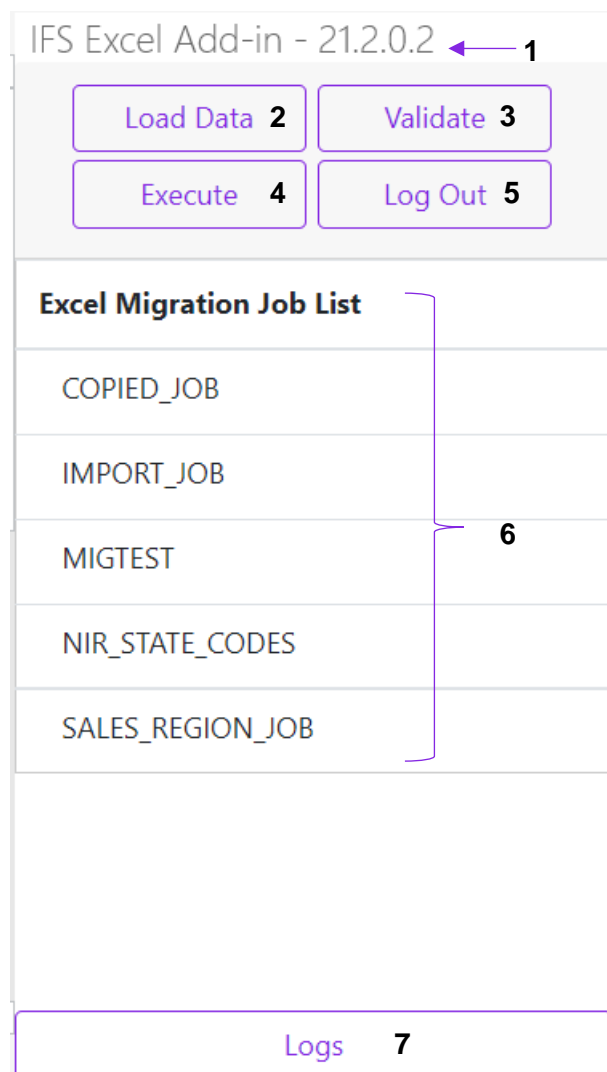7. Logs
   - App logs are displayed.

Figure 3 - IFS Excel Add-in Taskpane

WORKSHEET

When a job is selected, a popup will be shown (Figure 4), prompting two options:
  (1) open in new sheet
  (2) open in same sheet.
When an option is selected the active work sheet will be populated (Figure 5) with the relevant fields and will get automatically formatted as an excel table (Figure 5). The sheet is renamed to the migration job name.

IMPORTANT :
- when a user loads data in the same sheet [option-(2)] where data is already present the sheet will be cleared leading to a data loss.
- If you try to update a non-updatable field, the changes will be ignored. Date and number fields will automatically be formatted respectively, and the rest of the fields will be formatted as text. If the user wants to use any excel formulas on them, the fields should be formatted as general. Avoid using timestamps for Date fields since it is not supported.
- The **table name** and the **sheet name** is repectively *ViewName* and *ExcelMigrationJobName* as already configured in the migration job. These names should not be renamed in order to proceed with excel migration functionalities.
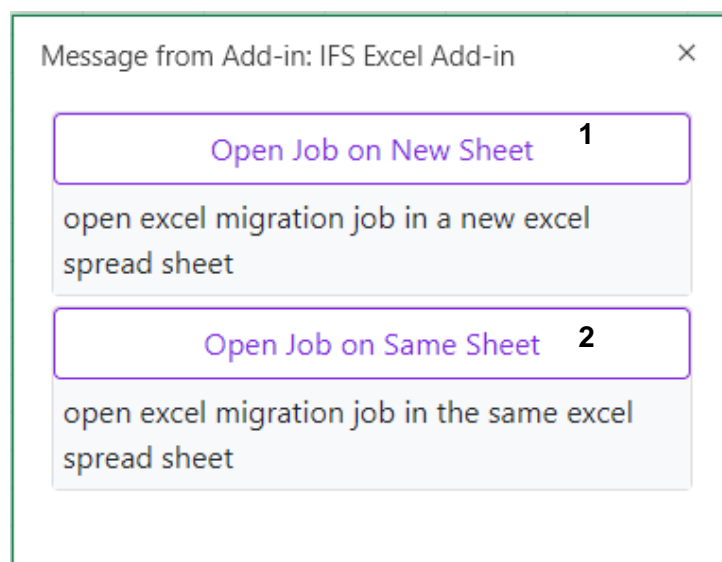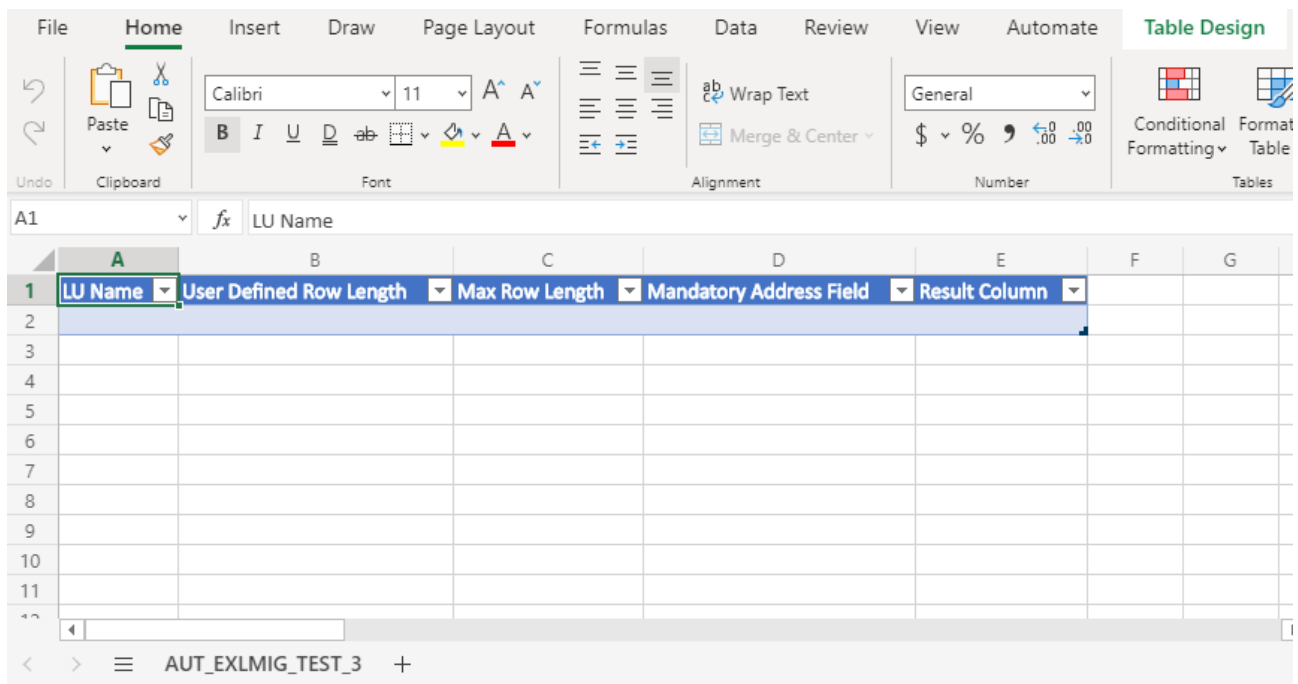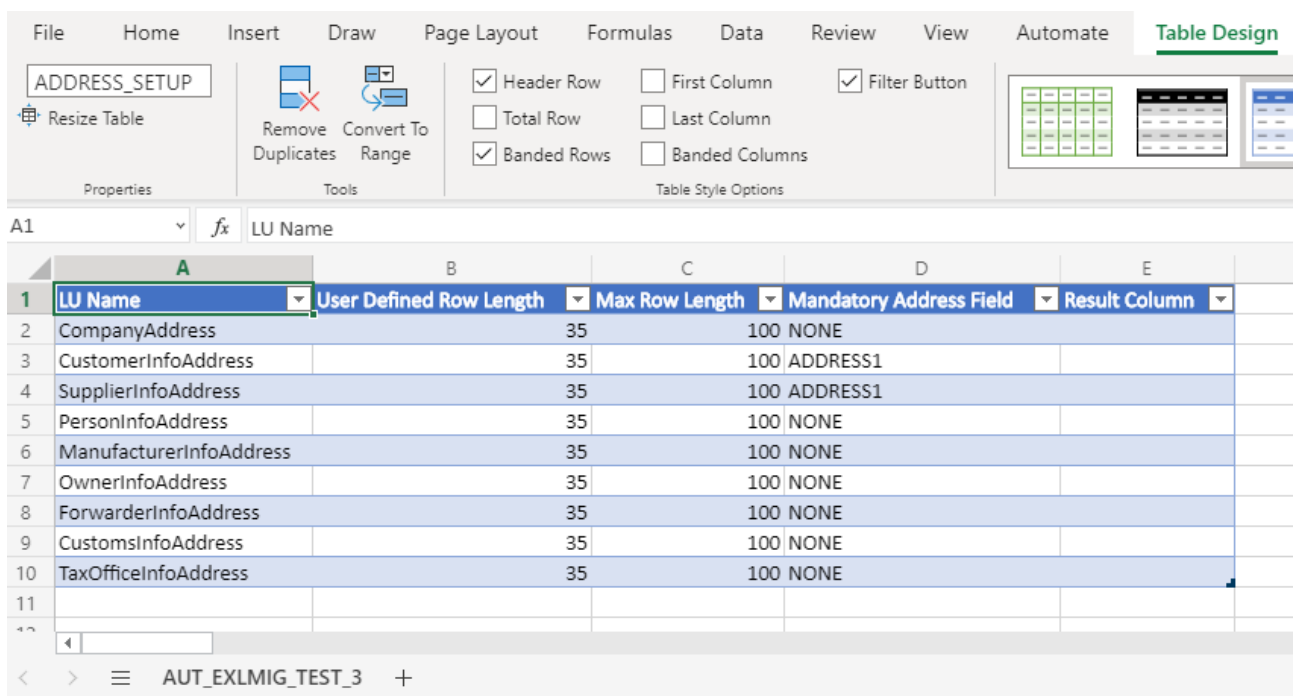

Figure 4 - popup dialog

Figure 5 – migration job open in a MS Excel worksheet

Figure 6 - migration job data loaded in MS Excel worksheet

3. Migrating from data filled excel sheets

If you need to use already available data from an excel sheet which has no previous connection to a job (i.e.: generated excel sheets) rename the sheet if it is the same as the loading migration job and load the job in a new sheet so the persisting data will not be cleared.

4. Validating and Executing

When executing or validating all the rows are impacted for the change.

4.1 Validate

Before saving changes to the database, you may need to validate it first. To do this, select Validate option. Once the processing is done, the outcome will be shown in the Result Field. Validating runs the checks in the destination logical unit(s). Data will not be saved when validating.

- **Validation OK**
  The validation process has done the possible validations for the data and did not find any errors. You may now proceed to saving these changes to the database.

LU Name	User Defined Row Length	Max Row Length	Mandatory Address Field	Result Column
CompanyAddress	36	100	NONE	Validate OK
CustomerInfoAddress	35	100	ADDRESS1	Validate OK
SupplierInfoAddress	35	100	ADDRESS1	Validate OK

Figure 7 - Validate OK

- **Error message**
  There are errors in the data. Modify the data and try again.

LU Name	User Defined Row Length	Max Row Length	Mandatory Address Field	Result Column
CompanyAddress	36	100	2312	ORA-20111: MandatoryAddressLine.NOTEXIST: The Mandatory Address Line "2312" does not exist.
CustomerInfoAddress	35	100	ADDRESS1	Validate OK
SupplierInfoAddress	35	100	ADDRESS1	Validate OK

Figure 8 - Error Message

- **No Operation**
  No operation took place because; conditions which were required to execute the Migration job were not met. E.g. The Migration job has only allowed to enter data for site 10. But you have tried to enter data to another site.

4.2 Execute

When pressing Execute all the rows will save the changes to the database. You may encounter additional errors when executing. Depending on the error you can change your data and try again. The result of the process will be shown in the Results column.

- **Inserted**
  Data was inserted to the database.

	A	B	C	D	E
1	LU Name	User Defined Row Length	Max Row Length	Mandatory Address Field	Result Column
2	ConnectReader	35	100	NONE	Inserted
3	CustomerInfoAddress	35	100	ADDRESS1	Updated
4	SupplierInfoAddress	35	100	ADDRESS1	Updated

Figure 9 - data Insert and Update

- **Updated**
  Existing data in the database was updated. In this process, if you try to update a non-updateable filed, the changes will be ignored. (Figure 9)

- **Processed**
  The operation performed was not an insert or updated operation. Rather it was a call to a method. This method could have inserted, updated or removed data. But the end result was that the method was executed successfully.

- **Error message**
  There were errors in the data. Modify the data and try again.

- **No Operation**
  No operation took place because; conditions which were required to execute the Migration job were not met.

- **Object does not exist**
  You were trying to update an object that does not exist. Check if the key values are correct

5. Debugging options

Click Logs button which is in the footer to expand the debug log area (Figure 10) to view the debug trace of the application. Other Application messages are shown in pop-up dialogs.
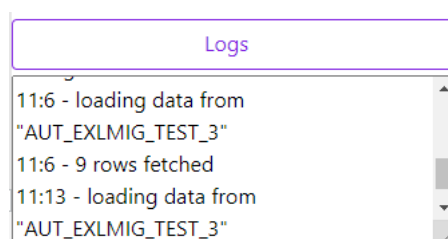

Logs

11:6 - loading data from "AUT_EXLMIG_TEST_3"
11:6 - 9 rows fetched
11:13 - loading data from "AUT_EXLMIG_TEST_3"
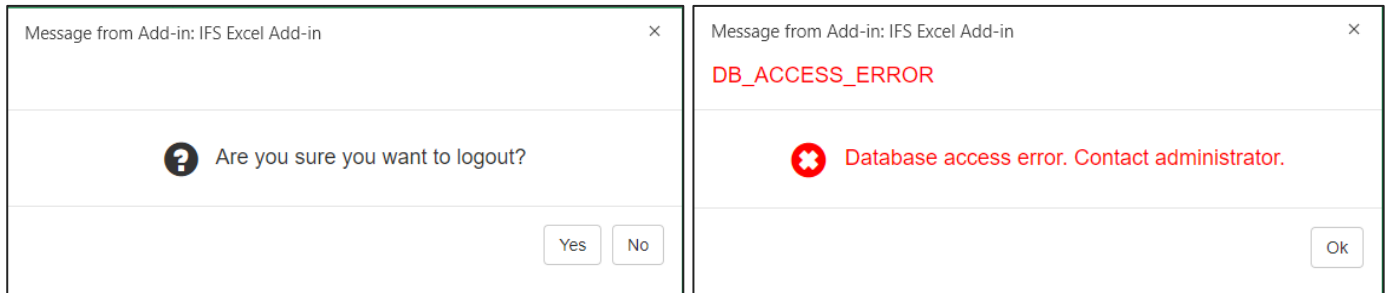
Figure 10 – Logs

Figure 11 - error, message popup dialog

6. General rules

- When you are working in an Excel worksheet, make sure that the column headings (See Figure 3) are in the first row. You should not rename the table name or the sheet name.
- Always make sure before updating data, that your changes are based upon the latest data loaded to excel from the database.
- As an end user, if you want to work with multiple migration jobs, you can achieve this with different work sheets per migration job. When you select different migration jobs, they will be loaded to different work sheets as you opted.
- If the user opens an excel file which already has data and need to proceed with the Excel Add-in, make sure to load the Migration job in a new sheet or loading in the same sheet might lead to data loss.
- If a particular user does not have access to a particular migration job that is related to a work sheet in the workbook, the system will not load that migration job in the navigator.
- To switch users, Execute all unsaved data, logout the session and login as a new user.
- Timestamp is not supported for Date fields.
- CLOB fields are not supported.
- The position (**POS**) column value in migration job when creation, is not the given order in the excel worksheet.
- To uninstall
  - Desktop app - clear all contents in folder "C:\Users\<username>\AppData\Local\Microsoft\Office\16.0\Wef and restart MS Excel.
  - Web client - go to internet options and clear all cookies related to excel, clear browsing cache and refresh web client.