

# Import To QES - Configuration, Launch and Use of Application

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## Purpose of Import to QES Application

The Import to QES tool is provided to support customers in electronically populating their SQL database with the data needed to launch and run the application. When launched the application is provided with the connection information needed to locate the destination SQL database that will be populated with the prepared data. After launch the application interface will enable the user to select the source excel worksheets that contain the prepared data, run validation against the prepared data, and when data is validated complete the import process for populating the SQL database.

## Overview of Tasks for Configuration and Launch of Data Population tool.

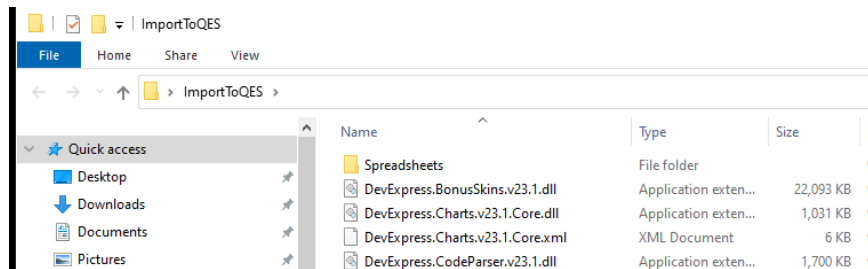
- a) download the zip file from our website
- b) extract the compressed files

c) edit and save the importtoqes.exe.config file so that the application can locate the SQL server and database that will be populated by the starting data for QES.

d) launch the import to QES application and execute the data validation and import tasks.

## Edit importtoqes.exe.config file

Extract the file ImportToQes .zip



Scroll through the available files and use Notepad to open the file importtoqes.exe.config for editing. Before making changes capture the contents of the file so that you can confirm that edits were accurately replaced.

Note, in some cases, if the file is not opened as an administrator, then it is possible the user will not be able to save the edited file.

Edit the contents of the file by locating the section **<connectionStrings>** and locating each of these four specific sections:

Data source=

User id=

Password=

Initial Catalog=

For these references update after the equal sign with content from your setups. There are no spaces after the =

**Data source=** enter the name of the SQL server instance, in the example below you will replace PRES08 with the name of your sql server instance. In appendix 1 is a tip for obtaining the instance name.

**User Id=** is the administrator user id for your SQL database, it is expected to be sa.

**Password**= should be the password for the sa user to access the sql server. In the example below it is Horizons1.0

**Initial Catalog**=enter the name of your sql database in the example it is StandAlone

Save the file

Example of Config file with original entries

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
<configSections>
</configSections>
<connectionStrings>
  <!--<add name="QESCon" connectionString="XpoProvider=MSSqlServer;data
source=localhost\SQLEXPRESS;integrated security=true;initial catalog=StandAlone;" />-->
  <add name="QESCon" connectionString="XpoProvider=MSSqlServer;data source=PRE08;user
id=sa;password=Horizons1.0;initial catalog=StandAlone;Persist Security Info=true" />
</connectionStrings>
<startup><supportedRuntime version="v4.0" sku=".NETFramework,Version=v4.7.2"/></startup>
</configuration>
```

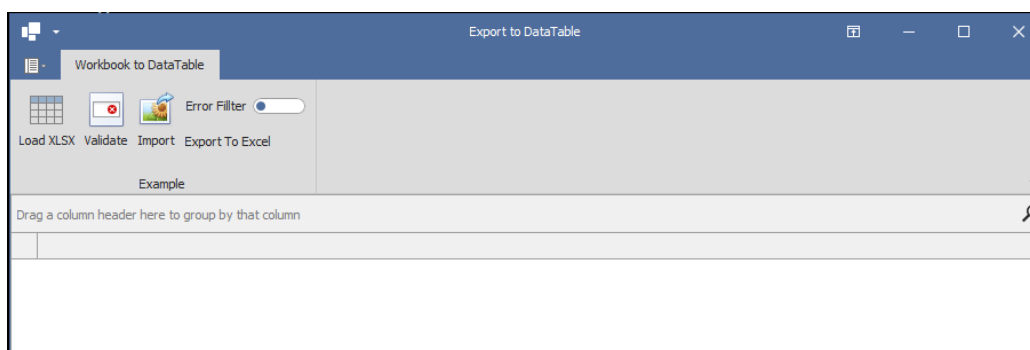
## Launch Import To QES application

Extract the file ImportToQes .zip

Scroll through the available files and locate the file importtoqes.exe

Double click or right click and run as administrator. Select method based on security settings.

The Export to Data Table form will appear.



## Troubleshooting Failed Launch

1. Export to Data Table form fails to appear. Generally, this means that the edits in the config file were incorrect or incomplete, often this is related to transposing of characters or missed punctuation when the config file was edited.
2. Message indicating Windows defender or another security tool prevented the application from launching. Generally, this means that the edits in the config file were incorrect or incomplete, often this is related to transposing of characters or missed punctuation when the config file was edited

## Import To QES Overview of Application Functionality

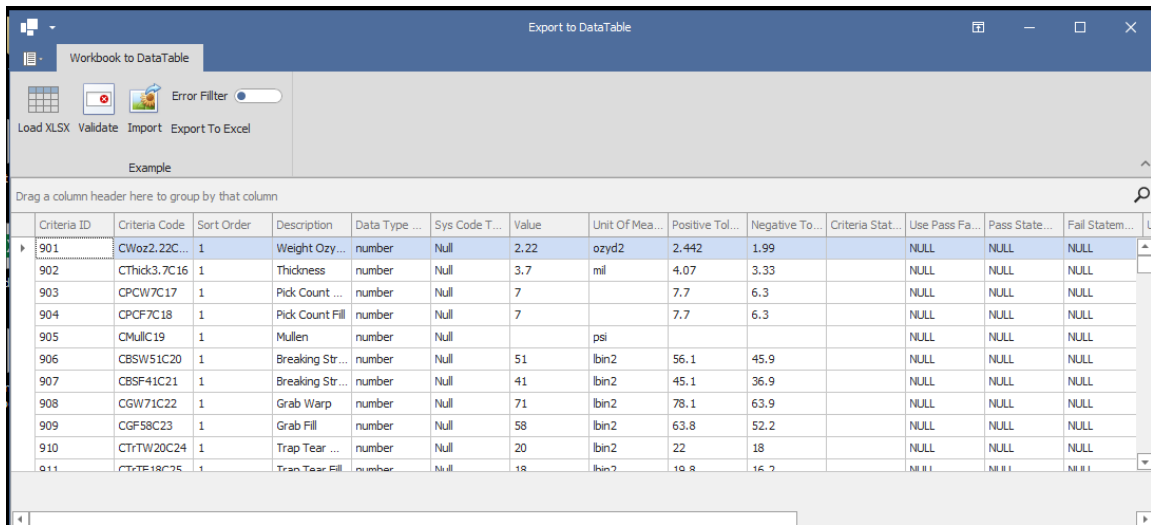
When using the Import to QES tool the user will need to set up or select the **destination** database and the **source** data that will be imported.

### Identifying Destination:

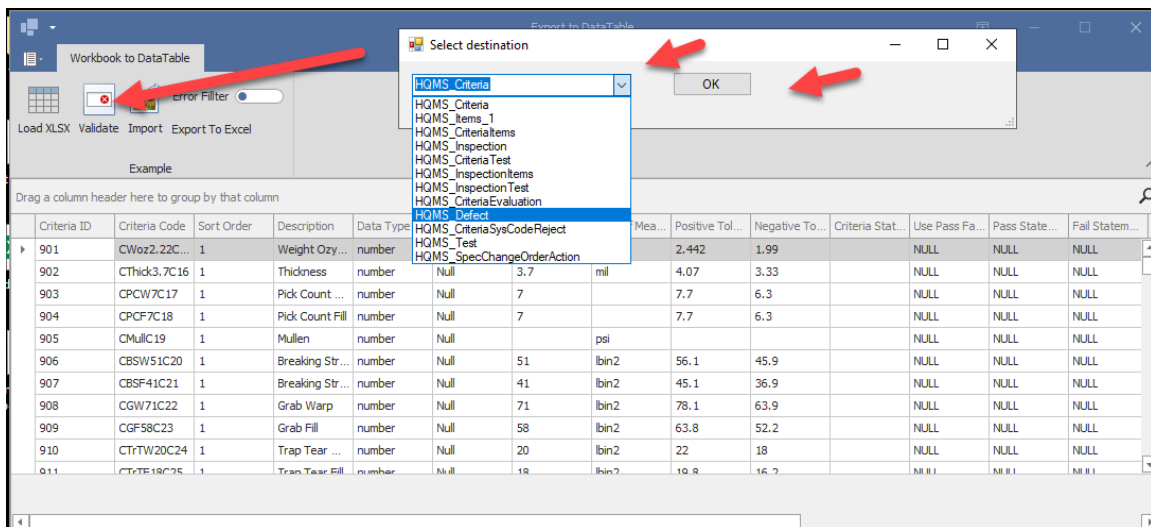
The destination database is identified in the importtoqes.exe.config file and is manually updated for each import scenario. Please see the details in Configuration and Launch section of this document.

### Selecting Source Records

The source data for import to the SQL database is prepared in a series of excel spreadsheets. Each import MUST have a specific spreadsheet as the source. When the desired spreadsheet is selected using the browse functionality found by clicking the Load XLSX button the data from the spreadsheet selected will visibly populate the Export to Data Table form.



Once the data populates the form the user will click on the Validate button to open the Select Destination dialogue box. In this box the user will select the QES table name of the destination table in the desired SQL database and then click on OK to process the validation.



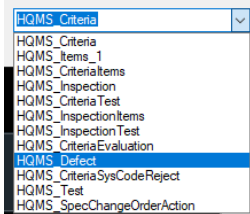
A progress dialogue will be displayed during the validation process and clear when validation is complete. The various errors will be marked with the red circle and white + icon. When all errors are cleared from source data or from validations in the existing database the user can click the import button to launch and complete the data import.

To support troubleshooting a file that is named the same as the selected source file but with the appending values of xlsx.txt is generated when the validation is run, this can be helpful for completing error resolution. The file is found where the source file was selected from.

Also, the button Export to Excel will generate a file with ValidataionErrorExport appended that is the data as recognized by the application. The file is found where the source file was selected from.

## Available Source/Destination Tables in QES

Below is a list of the tables in QES that can be populated using the Import to QES application.



There is a prerequisite order for the data import that needs to be followed so that records meet validation requirements. Any set of records below can be manually entered instead of imported, but manual entry should be complete before moving to the next table.

1. Complete setups using New Database create UDF and Sys List checklist.
2. HQMS\_Test - This table can also be populated manually in the application
3. HQMS\_Items\_1
4. HQMS\_Criteria
5. HQMS\_CriteriaEvaluation
6. HQMS\_Inspection
7. HQMS\_CriteriaTests
8. HQMS\_CriterialItems
9. HQMS\_InspectionItems
10. HQMS\_InspectionTests

## Recommendations for Building Source Spreadsheets

In a typical data population project users will develop two or three key spreadsheets that comprise all their needed data. Then as part of the final preparation of the data the information in these originating spreadsheets will be extracted to create individual tables to support the data population effort. For example, most users will have a table that lists all the Item identification information along with the inspection id, description and their master record code for tests and inspections. After the individual test master records are

populated, the user may select and build a new spreadsheet using just the columns for Item Id and Inspection ID as the source for creating HQMS\_InspectionItems records.

The data import tool only recognizes the first sheet in a spreadsheet so each import must be discreetly created from the source data spreadsheets. It is helpful if the same person executes the import as their familiarity with the data will support a more efficient process.