

I M P O R T I N G D A T A

Panorama makes importing data to InView and StockView easy IF you follow the procedures carefully and pay close attention as you go along. Importing takes a little effort, but compared to re-keying all of that data...!

The only InView and StockView files that you can or should import data to are Contacts, Equipment and Catalogue. Importing of financial data is not supported. *Very Big Tip* ♣

STEP 1: PREPARING TO IMPORT DATA

Before you can move any data into a HindSight file, you must have the data in a usable format. Imported data must be in a text, or ASCII, format. See the owners manual for the software from which you are exporting the data to determine how to create an export file in a text format.

STEP 2: A NEW PANORAMA FILE

The next step is to create a NEW Panorama file to temporarily hold your data for transfer into InView or StockView. If Panorama is not already running open a new Panorama file by double-clicking on the Panorama icon, otherwise choose Open File from the File menu.

In the resulting dialog window, click on Import, locate your text file in the window and click on Open. A new Panorama file, named Untitled opens with your data displayed in rows and columns.

This is a good time to use Save and give the file a temporary name such as "Transit File."

STEP 3: RE-FORMATTING THE DATA

COMBINING DATA

The Contacts file combines first and last names into a single field. It also stores multiple lines of an address in a single field. Data being imported from other databases which store this data in separate fields must be combined. To do a nice neat job of it requires a crash course in Panorama equation writing. Keep reading. By the same token, image databases, especially older DOS based programs have captions split into several fields while the Catalogue stashes all the caption lines as one. We'll go through the modifications slowly.

ADDRESS FIELDS

Let's assume your existing database had addresses divided into two fields. Panorama assigns letters, A, B, C, etc., as temporary names of fields in a new file.

In your new Panorama file, address data from your old file was imported into fields, say, J and K. To get the address into InView's Contacts file correctly the data in these fields, J and K, needs to be combined in a single field.

Click on the J field, making it the active field.

Select Formula Fill from the Math menu and enter the equation:

```
strip(J+¶+K)
```

In a nutshell, this equation tells Panorama to add a carriage return and the contents of K to J. "strip" removes any leading or trailing spaces or carriage returns to keep things tidy. *Warning!* ♣

Note: "¶" is a carriage return is in computer language, telling Panorama that we want to add a Return between J and K. On Macintosh it's created by typing Option-7. On Windows it's Alt+0182.

FIRST AND LAST NAMES

Let's suppose that the first and last names are in fields A and B.

Click on A to make it the active field.

Select Formula Fill from the Math menu and enter:

```
strip(A+ " "+B)
```

In this case, the quotes with a space between them tell Panorama to literally add a space there. As we did on the addresses we're simultaneously stripping any leading or trailing spaces or carriage returns to clean up the results as best we can.

If you have a third field for middle initials, let's say it's in C, the formula is simply expanded to:

```
strip(A+ " "+C+ " "+B)
```

When data is added from one field to another, it's copied but not removed from the first field. To empty a field holding information already combined into a single field, click on the field and choose Fill from the Math menu. Enter nothing, click OK and the field is filled with nothing, aka: emptied.

Very Big Tip:

The HindSight Extras disk contains a file named "Contacts Utility". This utility program can make it extremely easy to import names and addresses from mailing lists, PDA's and from your old software.

It even has some automated scripts for importing from a few specific products.

And, wouldn't you know it also handles all sorts of special Export functions for Contacts.

It could allow you to skip this whole chapter!

Check our web site at www.hindsightltd.com. The Forums may have some new information and the Download page may have some new utilities to make these tasks easier.

Warning!

You might think this formula didn't combine the two address lines. In a Data Sheet window you can only see the top line of a cell. Double click to open a cell in field J, then expand the cell's height to view the second line of address.



SAVE AS YOU GO

After each step give your data a visual inspection. If things are looking good type Cmd/Ctrl-S to preserve your work so far. Make a copy once in a while too, as an extra fallback position.

REVERT TO SAVED

If something goes wrong, Undo in the Edit menu can go back one step for you. The ultimate Undo is actually Revert to Saved in the File menu. This puts everything back to the way it was the last time you saved. That's why it's good to save periodically as long as you're well satisfied that everything is right so far.

EXTRACTING DATA

Equations are helpful in other changes. If you stored area codes and phone numbers in a single field previously, you need to separate them now, for HindSight files. We're going to give you one quick example of taking a number apart to either get you going or totally intimidated.

Presume the phone number field, named F in the new Panorama file, contains phone numbers entered in a variety of formats like (212) 664-3271 and 456-7890. Click on the field where you want to put area codes and choose Formula Fill.

Enter:

```
F["(",")"]
```

This extracts characters in field F from the first open parenthesis to the first close parenthesis. Numbers in F without parentheses are ignored.

Next click on the field where you want to put the rest of the number. It can even be the field that already contains the whole number, which in our example is field F.

Enter:

```
?(F contains ")" ,extract(F,"",2),F[-8,-1])
```

This extracts characters following “)” if a right parenthesis exists, otherwise it uses the eighth character from the end to the last, aka the last eight characters.

LEFTOVERS

In order to match file structures, you're probably going to need to delete some fields altogether before the data can be moved to your HindSight files. These would be fields that have no corresponding field in the HindSight file to which the data is headed. Prior to deleting them, consider where the data in those fields should be transferred if it has not been combined with other fields already.

Tip: Contacts, Catalogue and Equipment each have a Comments field in which you can place this otherwise unmatched data.

In your temporary Panorama file, a single field can serve as a temporary catch-all for data from fields you need to delete. To transfer data into the catchall, use this equation.

```
strip(C+¶+G+¶+M)
```

To include words that identify your data within the catch-all, add the words in quotes:

```
"Last Job "+G+¶+"Volume "+J+¶+Birthday "+M
```

This equation has a carriage return and, between the quotation marks, words to identify the data. The wording between quotes will be literally added to the beginning of the named field's data. Each of these three pieces of data will get placed onto another line within the data cell due to the ¶.

INSERTING FIELDS

If you need more fields in which to arrange your data, go to the Setup menu and choose Add Field. A dialog opens for you to name the field and to indicate whether it should be added to the end of the file or inserted in front of the active field.

NAMING THE FIELDS

If you have much database experience you've already recognized that Panorama's equations are powerful and fast. Now you're really going to be impressed.

Once your data has been re-arranged within the fields, it's time to re-name the fields themselves so that the names match the field names of the HindSight destination file.

This is probably a good time to Save in order to preserve your efforts so far.

The fields with data destined for InView or StockView must be named to exactly match field names in the destination file. Fields with unmatched names get ignored. Their sequence within the list does not matter.

To rename a field, double-click on the field title. For instance, if the field bearing your contacts names is currently titled D, double-click on D. A dialog window opens in which you can enter a new field name. In this case you type Contact. *Warning!* ♦

Lists of the field names for Contacts, Catalogue and Equipment follow at the end of this chapter. Fields to be imported from your temporary database must be named exactly the same as the fields in these lists in which you want them to end up. It's not necessary for you to have all of the fields in these lists. You may only have one or two. If you have extra fields or fields with different names, they get ignored during the import process. *Warning!* ♦

Note: The Field Names are not accessible in HindSight files because the access levels have been locked down.

STEP 4: IMPORTING DATA

Open the recipient file, Contacts, Equipment or Catalogue, and select Open File from the File menu. If you're adding to records already there, click on Append to Current Database at the bottom of the window. Otherwise click on Replace Current Database.

Click on the checkbox for Match Fields by Name.

Now locate and select the file that you just modified. Click on Open and the procedure is complete.

CHECK YOUR WORK

Before saving, open the Data Sheet of the InView or StockView file and scan through the fields to see if things look like they're where they belong. The Data Sheet is opened from the Windows menu. If everything looks right, Save. Otherwise make note of the errors then go back and recheck the field structure of your temporary file. To restore the HindSight file to its original condition use Revert To Saved from the File menu or just close the file without saving.

SAVE YOUR WORK

Warning!

It's not necessary to assign other attributes in this window. In fact, doing so may disrupt the ability to finish the importing process. Just stick to the Field Names.

Warning!

Each field in your Transit Panorama file must have a unique name. Import does not import data from duplicate field names. Remember that extra fields can be combined (see *Leftovers*.)



CONTACTS FIELDS

Reading left to right:

Category	Value	Contact	Company
Address	City	State	Zip Code
Country	Area Code1	Phone1	Memo1
Area Code2	Phone2	Memo2	Area Code3
Phone3	Memo3	Area Code4	Phone4
Memo4	Area Code5	Phone5	Memo5
Title	Business Type	Sources	Salutation
TaxRate	URL	EMail Addresses	Special Numbers
Event1	Event1 Notes	Event2	Event2 Notes
Event3	Event3 Notes	Shipping Accounts	Comments
Notes	Company Notes	Meetings	Phone Calls
Sales Calls	Transactions	Mailings	Invoice to:
Inv Address	Inv City	Inv State	Inv Zip Code
Inv Area Code	Inv Phone	Ship Address	Ship City
Ship State	Ship Zip Code	Home Address	Home City
Home State	Home Zip Code	Key Words	DateNew
Updated	Modified		

CATALOGUE FIELDS

Reading left to right:

Caption	Cross References	Creator	©Year
Registration#	MR	MR#	Generation
Format	Medium	Orientation	Date Created
Date Entered	File Location	In/Out	SerialA
SerialB	Memo	Value	\$Earned
Previous Use	Restrictions	Notes	Quantity
Range	Dupes	Image	Image Location

EQUIPMENT FIELDS

Reading left to right:

Item	Manufacturer	Model	Serial Number(s)
Purchase Date	Cost	QTY	Replacement Cost
Life	Salvage	Value	Insured Basis
Insured Value	Monthly Depreciation	Annual Depreciation	Warranty
Warranty Until	Comments	Category	Repair Costs
Repair Comments	Updated	Tag	New or Used
DateNew	Modified	Country Of Origin	Weight
Carnet Value			

CONTACTS UTILITY

Check your HindSight Extras disk for a supplementary file named Contacts Utility. It greatly expedites the process of getting data formatted and ready for importing into the Contacts file. The file is also available in updated versions from the Downloads section of the HindSight website, www.hindsightltd.com.

Check the Forums and the Downloads page for other utility files too.