

Database Importing

With this tutorial we are going to go through the basic elements of importing information from a Database using the Database import wizard that is included with Group Mail (Plus).

Step One - Getting started

Start Group Mail, and select "Database Import" from the Plug-ins menu as shown in figure 1. If "Database Import" is not present then the plug-in will need to be installed, it is available for download to Group Mail Plus users in the "Customer Section" of the website.

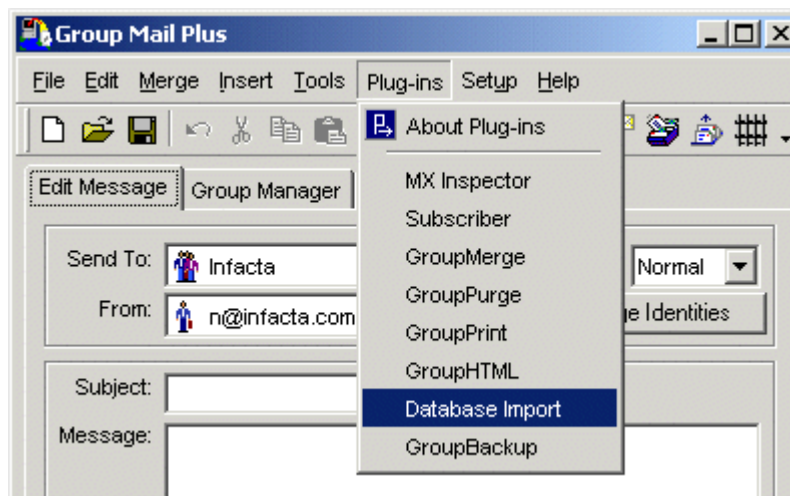


Figure 1

Note: The Database Import application uses Microsoft Active Data Objects (ADO) to communicate with a variety of 3rd party database systems. In order to ensure the import works efficiently and robustly, the correct OLE DB driver will be required, this can usually be downloaded from your database vendor.

Step Two - Configure a Database Connection

The purpose of this step is to tell Group Mail about the database it is to import from, i.e. what type of database it is - Microsoft Access, DBase, SQL Server or Oracle to mention a few, where on the network / the file path where it is to be found, which catalogue / set of tables to access, the username and password (if required) and so forth. All this data is stored as a database connection.

To create a database connection select the "New" button and the "Create a new Database Connection" screen is displayed (Figure 2), type in a descriptive name for the database connection.

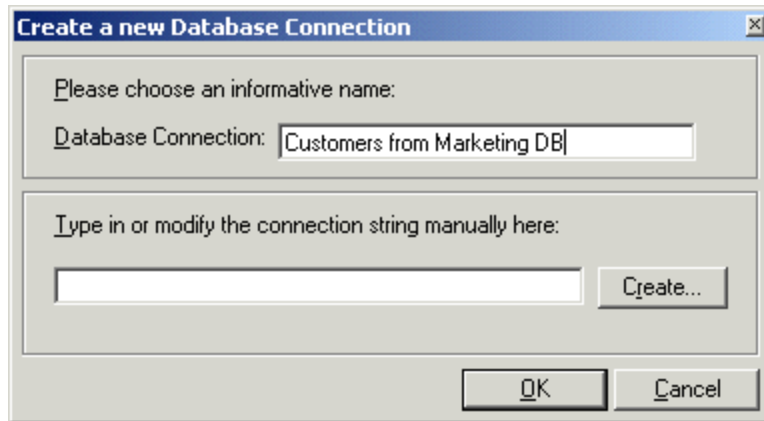


Figure 2

The connection string, if known can be typed manually in the box provided, choose "Create" to configure the connection string from the dialog in Figure 3. Select the entry from the list to match your database.

If your database does not appear in the list you will need to source an installation for it from your database vendor. If importing from Microsoft Access, select the appropriate "Microsoft Jet x.x OLE DB Provider". If your database provider does not provide an appropriate OLE DB option, they may have an ODBC driver in which case the "Microsoft OLE DB Provider for ODBC Drivers". Please ensure that the latest release of the OLE DB provider for your database is installed as older drivers may cause a degradation in speed or compatibility errors during the import.

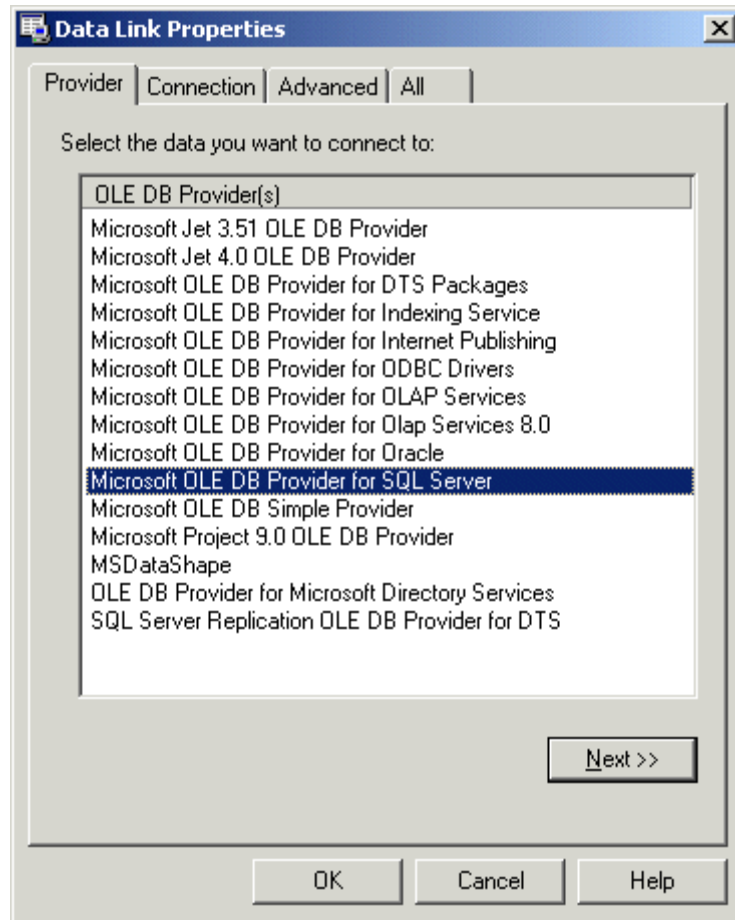


Figure 3

Select the "Connection" tab to provide additional parameters, the screen shown in Figure 4 is specific to Microsoft SQL Server, the screen may have different options for alternative databases.

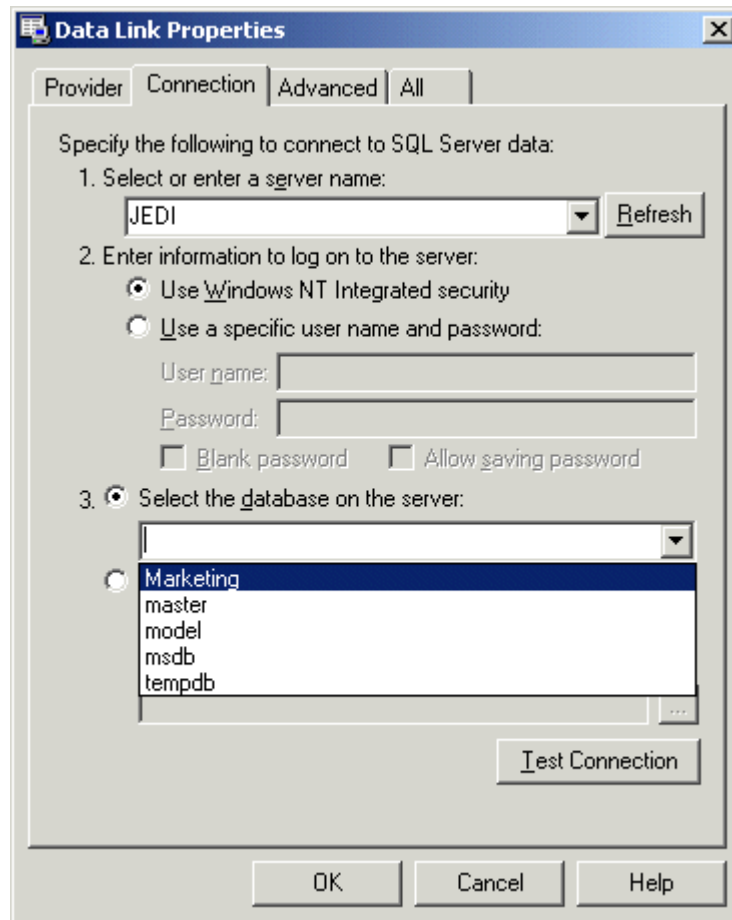


Figure 4

For SQL server we have selected the server name "JEDI" (alternatively you can use the IP address of the server), we use "Windows NT Integrated security" and we will use the "Marketing" database from the server. Click the "Test Connection" button to ensure the options are valid, if not there are further options available on the "Advanced" tab. Once the connection is correct, choose OK, and select OK from the "Create a new Database Connection" screen, the new database connection is now displayed in the list as shown below.

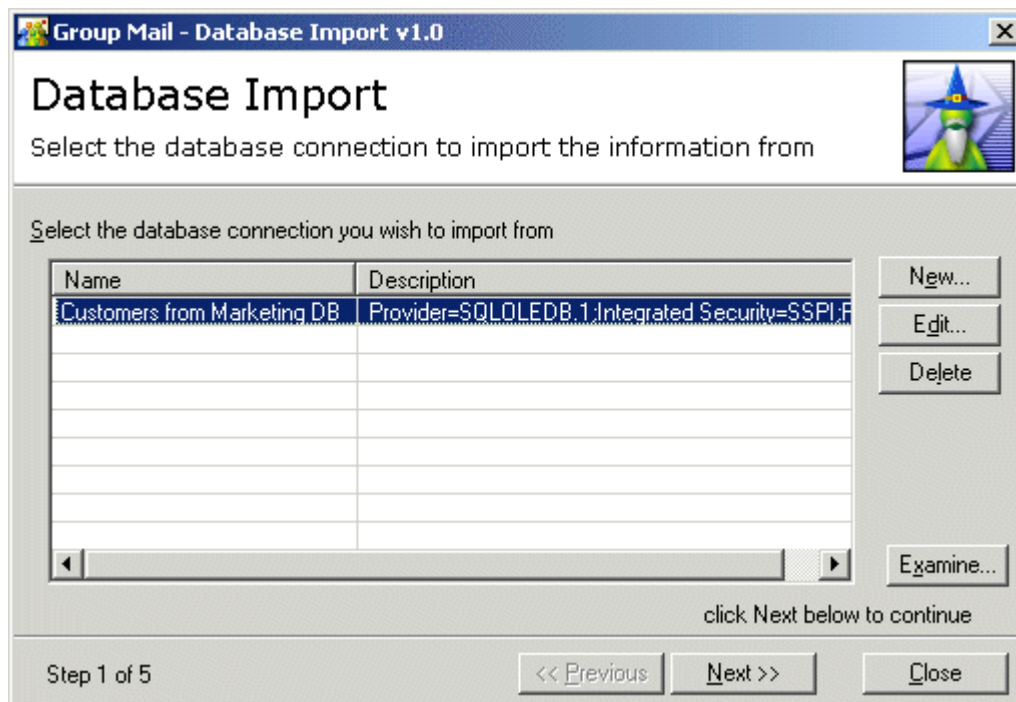


Figure 5

Select "Next" to proceed to the next step.

Step Three - Database Record Selection

The record selection step is used to identify the data to be imported from the database. In the example below, from a table containing all the company's customers worldwide the parameters are configured to only import the US based customers.

There are two methods provided to identify the records

- Import from a Table, optionally using filters
- Using an SQL query

Both methods are used below to achieve the same results (import of US based customers only). To import from a table, select the radio button, and choose the appropriate table from the dropdown list.

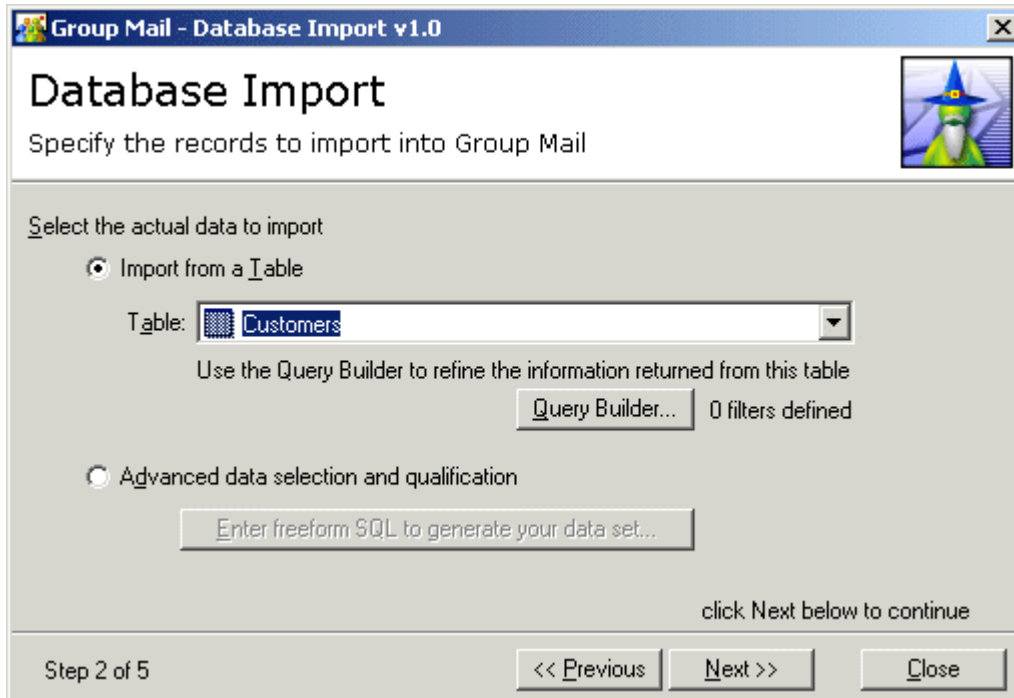


Figure 6

To add a filter for US customers, select the "Query Builder" button, and then choose "Add" on the "Query Builder" screen to display the "Create a new Import Filter" screen shown below.

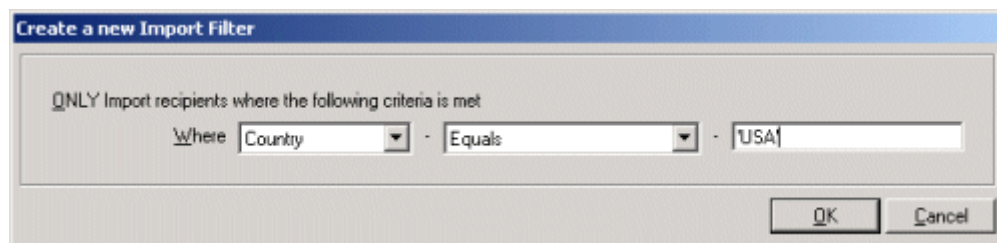


Figure 7

"Country" is selected from the dropdown list of fields, obviously the list of fields available will vary depending on the Table selected in Figure 6. Note that USA is surrounded with single quotes, this is necessary if the database field is a Text data type.

Select OK and the rule is added to the list. Numerous rules can be configured, so another rule could be added to return US based customers who have purchased products in excess of \$1,000.

When more than one rule is added the rules can be combined using "AND"/"OR" operators.

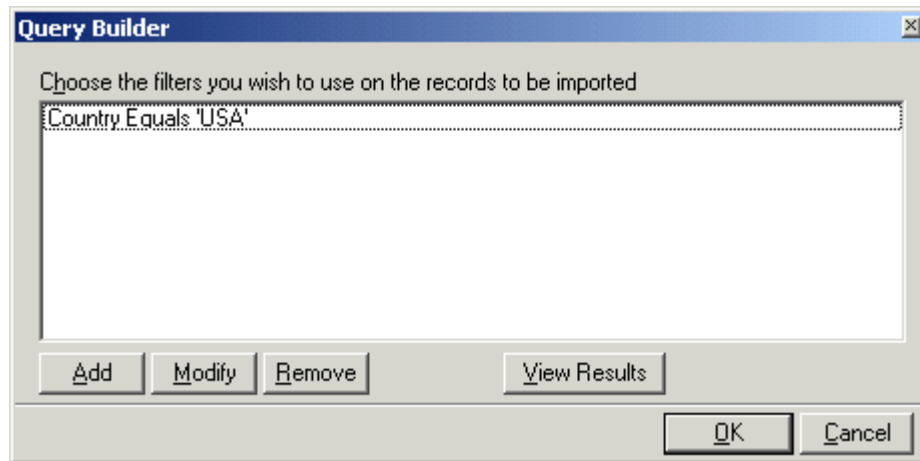


Figure 8

Once the rule(s) are set up, the "View Results" button can be used to see the data returned from the table using the rules specified.

Select OK to return to the main screen (step 2).

Alternatively, records can be selected using the SQL query, users are required to be familiar with SQL syntax in order to effectively use this option. Select the "Advanced data selection and qualification" radio button and click the "Enter freeform SQL to generate your data set" button to display the "Advanced Query" screen as shown in figure 9.

Type in SQL in the box provided, more complex queries can be built (e.g. Joins between Tables).

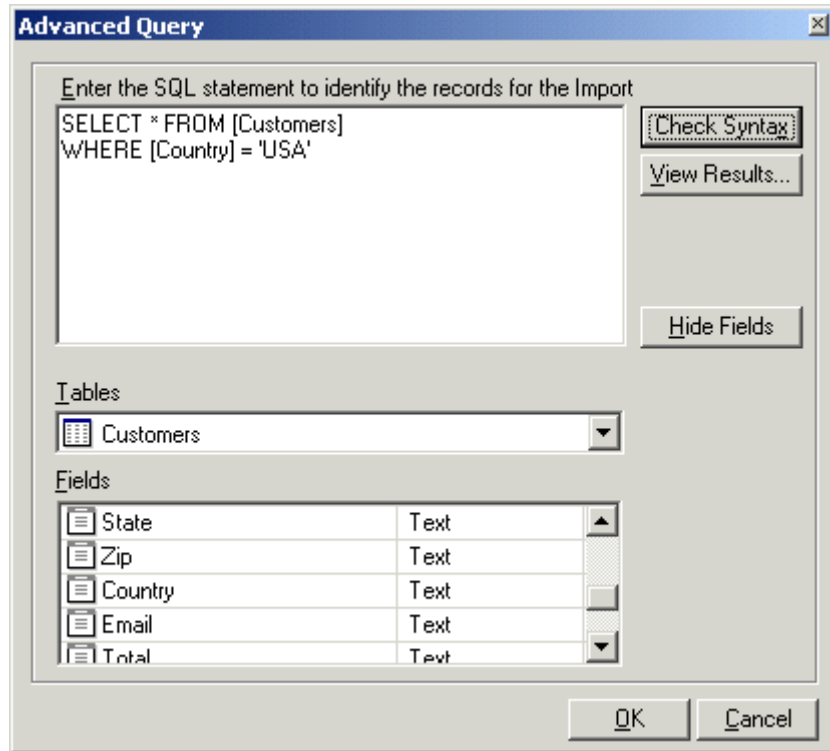


Figure 9

Select Next to proceed to the next step.

Step Four - Match Database Fields to Group Mail Fields

When importing data from a database, Group Mail needs to know which fields are to be stored. In order to achieve this each database field required must be selected from the dropdown list corresponding to the Group Mail field. The "Email Address" field is mandatory.

The "Full Name Macro" is a special case, and should be used where the recipients name details are stored in one field. If selected, during the import the name data contained in the selected database field will be parsed and stored in the Group Mail "Title", "First Name", "Initial" and "Last Name" fields.

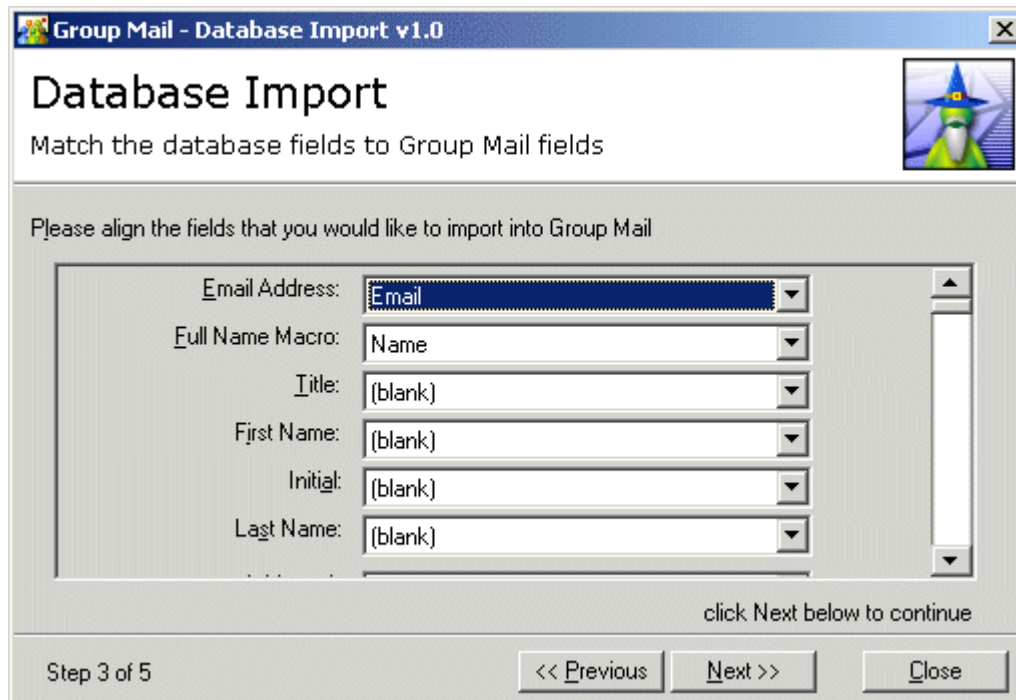


Figure 10

When all the required fields are selected, select next to move to the next step.

Step Five - Select Destination Group

Now that the records to be imported have been specified, and the database fields have been matched to Group Mail fields all that remains is to select which group to store the data. An existing Group Mail group can be selected from the dropdown list or a new one created by selecting "Create a New Group".

Selecting the "Update existing recipients" checkbox will result in the Group Mail record being updated during the import when a duplicate record is found. By default duplicates are ignored.

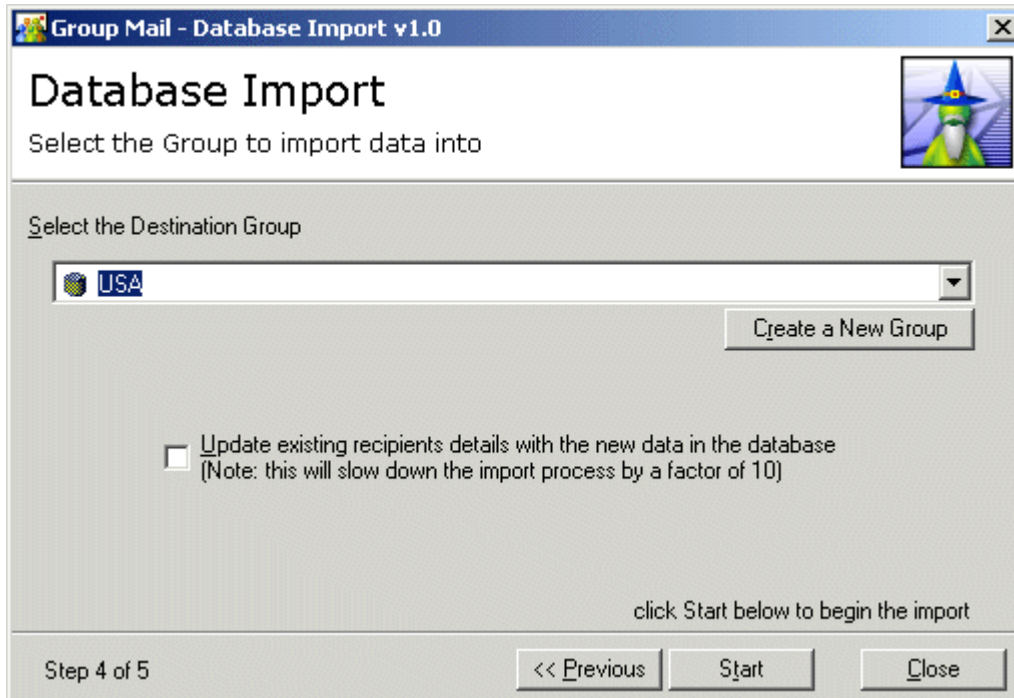


Figure 11

Click the "Start" button to start the import process.

Step Six - Run the Import Process

Step 6 imports the records into Group Mail. During the import a number of counters are displayed -

- **Total Processed** - Displays the number of records processed from the import database.
- **Added** - Indicates the actual number of entries added to the group,
- **Duplicates** - Shows the number of duplicates found in the import, i.e. the number of email addresses that already existed in the group.
- **Illegal** - Prior to importing a particular record, some basic validation is performed on the email address, any email address failing this check is not imported.

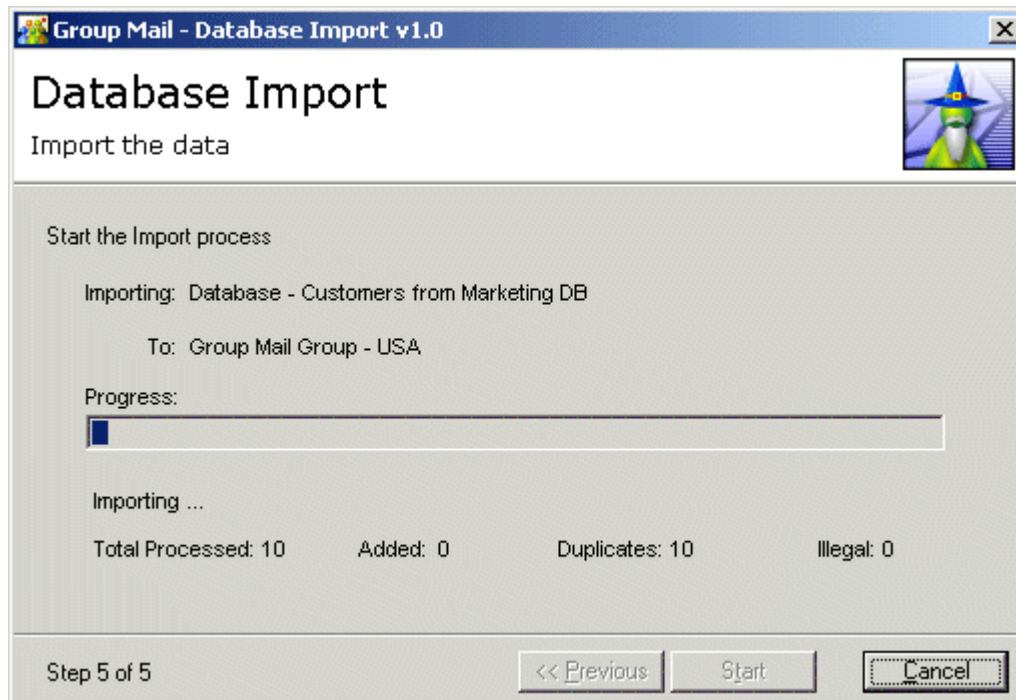


Figure 12

When the Import is finished you will be presented with a dialog that allows you to view a progress/status log. The log file will show you which records were not imported and why. Also it will detail those records which were updated or rejected (based on the Duplicate option described earlier).

You have now successfully completed a Database Import!