

Universal Metadata Import Scanner

InfoLibrarian Universal Import Scanner

The InfoLibrarian Universal Metadata Import scanner allows you to import metadata from Microsoft Excel, Access and other OLEDB compliant data sources.

Each import source is treated as table data and can be mapping into InfoLibrarian Objects.

In this example we will configure an OLEDB Connection to an Access Database "Northwind Traders" to demonstrate.

Click the "Connect to a Database using OLEDB/ODBC

InfoLibrarian Universal Metadata Import Scanner
Import data from a database or Excel spreadsheets as metadata.

Connection Information | Optional Scan Properties | Remote Security | Import Mappings

InfoLibrarian Universal Metadata Import Scanner

Metadata Source Name Type in a Metadata Source and Metadata Catalog Name for this scan
Metadata Catalog Name

Source Connection Information

☒ Connect to a Database using OLEDB/ODBC

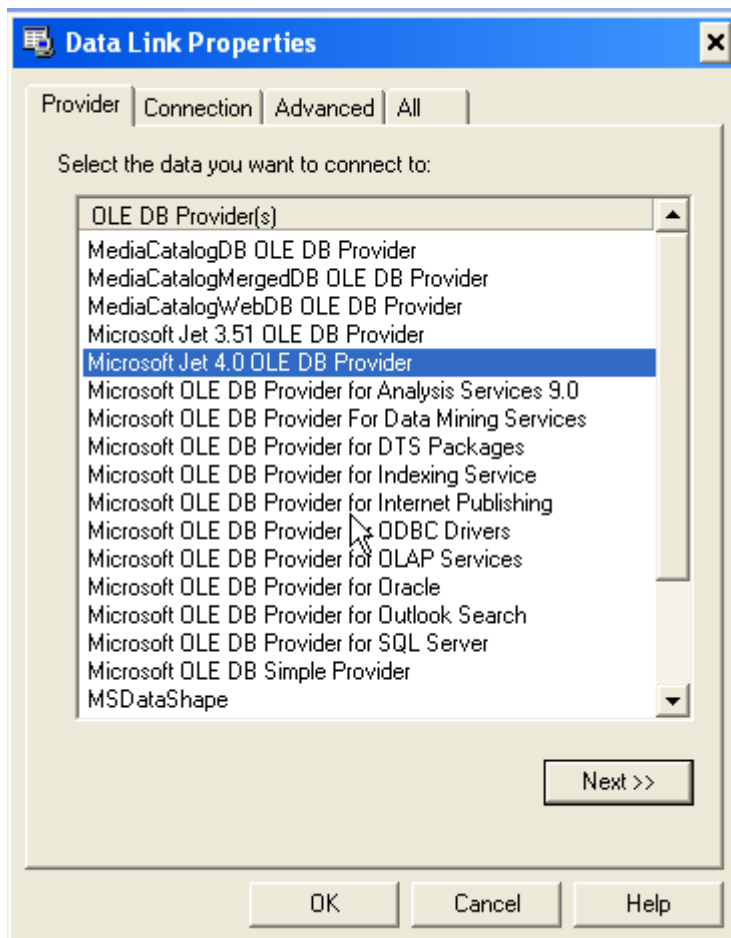
OLEDB Provider = MSDASQL
DataSource =
Database =

☐ Import from Microsoft Excel

Browse for an Excel File (.XLS)

Setup your connection information here then go to the Mapping Tab to create mapping from source to repository.

The Following dialog will appear....

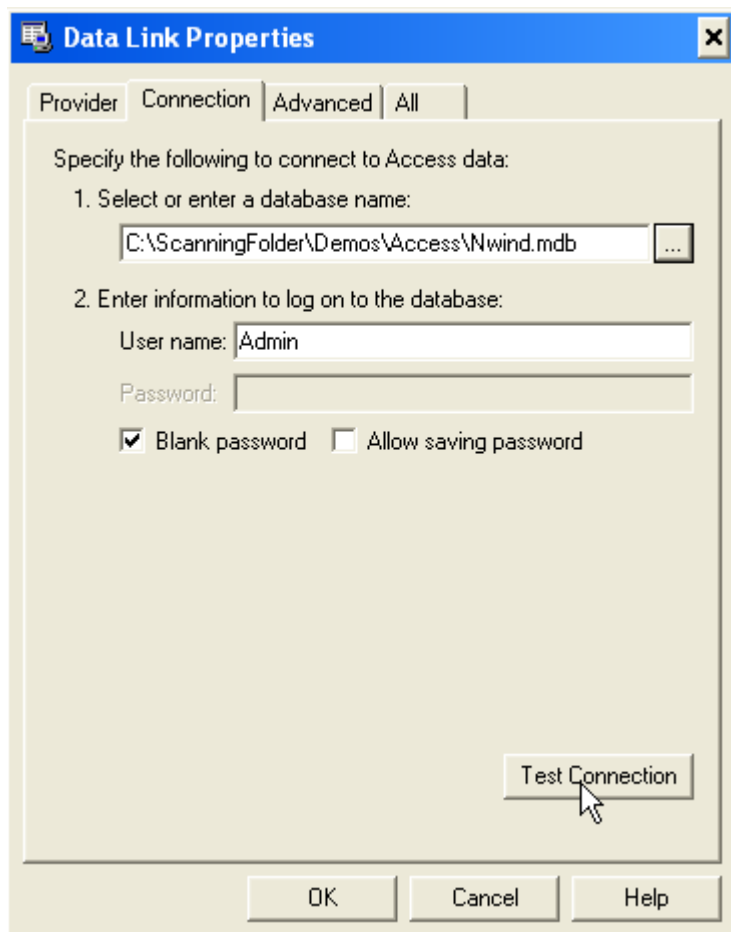


This is the Microsoft OLEDB Data Links Dialog. Choose the data source that applies to the source you wish to scan.

Here we are choosing Microsoft Jet 4.0 OLE DB Provider (Microsoft Access)

On the Connection tab we will **browse** for an Access Database.
Here we are choosing Northwind.

Note: If using security to connect to an OLEDB Datasource, make sure you check the allow saving password ... that the password is also saved for the scan. (Note: This will be encrypted 3DES in the repository)



Click Test Connection. Then Ok.

You should return to this view on the wizard and see the connection information in the black area.

Type in a Name for the Metadata Source and Metadata Catalog.

Note: Refer to the InfoLibrarian Books Online for more details on Metadata Source and Catalog meanings.

The screenshot shows the 'InfoLibrarian Universal Metadata Import Scanner' dialog box. It has a title bar with a close button. Below the title bar is a subtitle 'Import data from a database or Excel spreadsheets as metadata.' and a tabbed interface with four tabs: 'Connection Information' (selected), 'Optional Scan Properties', 'Remote Security', and 'Import Mappings'.

Under the 'Connection Information' tab, there is a section titled 'InfoLibrarian Universal Metadata Import Scanner'. It contains two text input fields: 'Metadata Source Name' with the value 'MyAccessDatabases' and 'Metadata Catalog Name' with the value 'NorthwindTradersSample'. To the right of these fields is a label 'Type in a Metadata Source and Metadata Catalog Name for this scan' and a 'Browse' button.

Below this is a section titled 'Source Connection Information'. It has a checked checkbox 'Connect to a Database using OLEDB/ODBC'. Under this checkbox is a black text area containing the following text: 'OLEDB Provider = MICROSOFT.JET.OLEDB.4.0', 'DataSource = C:\SCANNINGFOLDER\DEMOS\ACCESS\NWind.MDB;', and 'Database ='. To the right of this text area are 'Configure' and 'Clear' buttons.

Below the black text area is an unchecked checkbox 'Import from Microsoft Excel'. Under this checkbox is an empty text input field and a 'Browse' button. Below the input field is the text 'Browse for an Excel File (.XLS)'.

At the bottom of the dialog box, there is a help icon (question mark) and a text box that says 'Setup your connection information here then go to the Mappings Tab to create mapping from source to repository.' At the very bottom are 'Cancel' and 'Scan Now...' buttons.

Go to the Mappings Tab and click **Load Source Info**

The screenshot shows the 'InfoLibrarian Universal Metadata Import Scanner' dialog box with the 'Import Mappings' tab selected. The 'Source Table Name' dropdown menu is open, displaying a list of tables: Categories, Customers, Employees, Order Details, Orders, Products, Shippers, and Suppliers. The 'Customers' table is highlighted. On the left, the 'Repository Column' section includes fields for Object Name, Description, Comments, Body (Long Text), Object Type, and Create Object Type. A blue arrow points from the 'Description' field to the 'Customers' table in the dropdown. On the right, there is a list of checkboxes for various metadata fields: PostalCode, Phone, Fax, CustomerID, Country, ContactTitle, ContactName, and CompanyName. At the bottom, there is a help icon and a text box stating: 'Once connection information is entered click "Load Source Info" Selecting Load Source Info will refresh and clear all mapping settings.' Below this text are buttons for 'Load Source Info...', 'Apply Settings', 'Cancel', and 'Scan Now...'.

The source table name dropdown should appear.
Select the table you want to import.

Mapping to the Repository

Once you have selected the table name you wish to import, You will need to map the source columns from the table to the InfoLibrarian object.

Note: See Books Online for descriptions of the InfoLibrarian object values.

Only Object Name and Object Type are mandatory

Object Name: Name of the Object you are creating

Description: a short description

Comments: a long description

Body (Long Text) : for comments > 512 bytes such as code snippet or other long text value

Object Type : The object type within InfoLibrarian you will create an instance of for each source row.

You may select a pre-created object type or define a new object type name.
In this case we are calling it a "ContactObject" since we're importing contacts.

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Connection Information | Optional Scan Properties | Remote Security | **Import Mappings**

Source Table Name: Customers

Repository Columns	Source Columns	Map as Additional Properties
Object Name	ContactName	Field Name
Description	ContactTitle	☒ Phone
Comments	CompanyName	☒ Fax
Body (Long Text)	Address	☐ CustomerID
	☐ Use Existing Object Type	☐ Country
Object Type		☐ ContactTitle
Create Object Type	ContactObject	☐ ContactName
		☐ CompanyName
		☒ City
		☐ Address

Once connection information is entered click "Load Source Info".
Selecting Load Source Info will refresh and clear all mapping settings.

Load Source Info... Apply Settings

Cancel Scan Now...

Additional properties are any other value from the source you wish to be created as additional properties of the object you are instantiating from the source data. The left hand section represents the "Base Object" fixed properties
Additional properties are custom to your object instance.

Optional remote security settings can be set if the location of the file requires share level access.

The screenshot shows the 'InfoLibrarian Universal Metadata Import Scanner' dialog box with the 'Remote Security' tab selected. The dialog has a title bar with a close button (X). Below the title bar, the text reads 'InfoLibrarian Universal Metadata Import Scanner' and 'Import data from a database or Excel spreadsheets as metadata.' The 'Remote Security' tab is active, showing two authentication options: 'Use Windows Authentication' and 'Use LDAP Authentication', both with unchecked checkboxes. Below these are two columns of input fields. The 'Windows Authentication' column includes 'Server Name (ie: \\ServerName or 192.168.10.1)', 'User Name', and 'Password'. The 'LDAP Authentication' column includes 'Address (ie: 192.168.10.1 or host.domain.com)', 'Port' (with '389' entered), and 'Search Base'. A help icon (?) is followed by a note: 'Use Remote Security Only when the source will be auto-scanned from a remote server location that requires authentication and you are specifying a file as the source. Use a fully qualified UNC path when specifying the source file for a scan or OLEDB connection to a file source.' At the bottom right, there are buttons for 'Test', 'Cancel', and 'Scan Now...'.

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Connection Information | Optional Scan Properties | **Remote Security** | Import Mappings

☐ Use Windows Authentication
☐ Use LDAP Authentication

Windows Authentication
Server Name (ie: \\ServerName or 192.168.10.1)
User Name
Password

LDAP Authentication
Address (ie: 192.168.10.1 or host.domain.com)
Port: 389
Search Base

? Use Remote Security Only when the source will be auto-scanned from a remote server location that requires authentication and you are specifying a file as the source. Use a fully qualified UNC path when specifying the source file for a scan or OLEDB connection to a file source.

Test

Cancel Scan Now...

Optionally, you may enter a description and comments for the metadata source and catalog of the scan. Best option is to maintain these directly within the Administrator to avoid over-writing from the scan point.

The screenshot shows a Windows-style dialog box titled "InfoLibrarian Universal Metadata Import Scanner" with a subtitle "Import data from a database or Excel spreadsheets as metadata." The dialog has four tabs: "Connection Information", "Optional Scan Properties" (which is selected), "Remote Security", and "Import Mappings". Inside the "Optional Scan Properties" tab, there are four text input fields: "Data Source Description", "Data Source Comments", "Catalog Description", and "Catalog Comments". The "Data Source Comments" field is currently active, with a cursor visible. At the bottom right of the dialog are two buttons: "Cancel" and "Scan Now...".

Click “Scan Now” and the scanner will begin executing.

The screenshot shows the 'InfoLibrarian Universal Metadata Import Scanner' dialog box. It has a title bar with a close button. Below the title bar is a subtitle 'Import data from a database or Excel spreadsheets as metadata.' and a tabbed interface with four tabs: 'Connection Information' (selected), 'Optional Scan Properties', 'Remote Security', and 'Import Mappings'.

Inside the 'Connection Information' tab, there is a section titled 'InfoLibrarian Universal Metadata Import Scanner' with a small icon. Below this, there are two text input fields: 'Metadata Source Name' (containing 'MyAccessDatabases') and 'Metadata Catalog Name' (containing 'NorthwindTradersSample'). To the right of these fields is a label 'Type in a Metadata Source and Metadata Catalog Name for this scan' and a 'Browse' button.

Below the input fields is a section titled 'Source Connection Information'. It contains a checked checkbox labeled 'Connect to a Database using OLEDB/ODBC'. Below this is a large black rectangular area containing the text 'Testing connection...' and 'Connection Succeeded!'. To the right of this area are 'Configure' and 'Clear' buttons.

Below the black area is an unchecked checkbox labeled 'Import from Microsoft Excel'. Below this is a text input field and a 'Browse' button. To the right of the input field is the text 'Browse for an Excel File (.XLS)'.

At the bottom of the dialog, there is a help icon (question mark) and a text box that says 'Setup your connection information here then go to the Mappings Tab to create mapping from source to repository.' Below this are 'Cancel' and 'Scan Now...' buttons.

The results of your scan will be visible in the Tree View within the InfoLibrarian Administrator, you may require a refresh if the Metadata Source and or Catalog if newly created.

The screenshot displays the InfoLibrarian Administrator interface. On the left is a tree view under 'MyAccessDatabases' showing a list of contacts under 'NorthwindTradersSample' > 'ContactObject'. The main panel shows the details for the 'Alejandra Camino' object, which is of type 'ContactObject'. It includes fields for 'Keyword Description' (Accounting Manager) and 'Comments' (Romero y tomillo), both with 'Delete' links. A 'Save Changes' link is at the bottom. A warning message states: '[Thesaurus Set to Off] - WARNING - Description and Comments entered and saved here for this object may be over-'. Below this is a 'Scanned Properties (Read Only)' table.

Property Name	Property Value	Last Changed in Repository
PostalCode	28001	6/27/2007 7:26:57 AM
Phone	(91) 745 6200	6/27/2007 7:26:57 AM
Fax	(91) 745 6210	6/27/2007 7:26:57 AM
City	Madrid	6/27/2007 7:26:57 AM