



Visual Integrator Overview Document

for Sage 100 ERP

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Introduction

This document includes overview information about each task in the Visual Integrator module that is accessible from the menus. You can print this document to use as an offline reference.

The information in this document is also available in the Help system in the overview Help topics.

For additional information about the software, refer to the Help system, which also includes the following:

- Overview information for windows that cannot be accessed directly from menus
- Procedures that guide you step-by-step through common activities
- Explanations of important concepts
- Field descriptions
- Flowcharts
- FAQs

Main Menu

Import Job Maintenance

Navigation

Select Visual Integrator Main menu > Import Job Maintenance. In the Import Job Selection window, enter a job name and table name, and then click Accept.

NOTE If you selected a job or table for a module other than Job Cost, Material Requirements Planning, Payroll, TimeCard, or Work Order in the Import Job Selection window, you must exit Import Job Maintenance and reopen it to create or modify jobs for those modules.

This task is available only with the appropriate security setup.

Overview

The following information applies only to import jobs for modules other than Job Cost, Material Requirements Planning, Payroll, TimeCard, and Work Order.

Use Import Job Maintenance to define and maintain import jobs that are used to import data into the software. After an import job is defined, this task can also be used to execute the job immediately or the job can be added to the Jobs menu.

You must define which data items will be imported and where each data item is contained in the external source file. You must also specify the operation to perform with the imported data.

The selection fields determine the criteria by which records are evaluated and subsequently selected. The selection range values can be predefined here or can be entered at the beginning of the job. The selection process is optional; if no data selection criteria are defined, all data records from the import file are imported.

You can define how to recognize different record types from the data source when importing to a data file that uses multiple record types to store its data (for example, Sales Order Invoice files). You can also define how to recognize records from the data source that should be skipped (not imported).

All data to be imported by the Visual Integrator module must be validated before any data files are updated. Several separate validation processes are performed for each data item. In addition to checking for invalid data, the Visual Integrator module also processes the data into a format compatible with the software. If any data item within an import record fails the validation test, the entire record is skipped from the import process. The record skipped, and the reason for the failure, is documented by the system. This information is detailed in the Import Log and can be printed when the import process is complete. Many data fields have default standard validations. You can change these validations or remove them, as required.

Export Job Maintenance

Navigation

Select Visual Integrator Main menu > Export Job Maintenance. In the Export Job Selection window, enter a job name and table name, and then click Accept.

NOTE If you selected a job or table for a module other than Job Cost, Material Requirements Planning, Payroll, TimeCard, and Work Order in the Export Job Selection window, you must exit Export Job Maintenance and reopen it to create or modify jobs for those modules.

Overview

The following information applies only to export jobs for modules other than Job Cost, Material Requirements Planning, Payroll, TimeCard, and Work Order.

Use Export Job Maintenance to define and maintain export jobs that are used to export data from the software to an external file or database. After an export job is defined, this task can also be used to execute the job immediately or to schedule how often the job is to be run.

The selection fields determine the criteria by which records are evaluated and subsequently selected. The selection range values can be predefined here or can be entered at the beginning of the job. The selection process is optional; if no data selection criteria have been defined, all data records from the data file are exported.

One or more sort fields can be used to sort the data. Each field can be sorted in ascending or descending order. The sort process is optional; if no data sort criteria have been defined, all data records from the data file are exported in the order in which they are processed (typically, in the order in which the source file is sorted).

NOTE Record selection performed on the Select tab is different from record type selection performed on the Sort tab. Record selection compares data assigned to the record to be written, whereas record type selection compares data in the source file record contained in a string array called IMP\$[all].

Job Select

Navigation

Select Visual Integrator Main menu > Job Select.

Overview

Use Job Select to select and start any defined import or export job.

Job Listing

Navigation

Use one of the following methods to access this window:

- Select Visual Integrator Main menu > Job Listing.
- Select Visual Integrator Main menu > Job Select. In the Job Select window, click the Print Jobs Listing button.

Overview

The Job Listing allows you to print a list of existing jobs, along with job descriptions and file names.

Data Dictionary Listing

Navigation

Select Visual Integrator Main menu > Data Dictionary Listing.

NOTE This task is not available for Sage 100 Premium ERP.

Overview

The Data Dictionary Listing provides a list of information related to the type of data contained in each data file. This report can be used as a reference when selecting a specific data file for import or export. Detailed information for individual data items for each data file is provided. Item name, type, data type, key, and mask/length information for each data item is provided. In addition, import validation information for each data item, and record type and file linkage information for each file can be printed.

NOTE The Data Dictionary Listing contains information only for the Job Cost, Material Requirements Planning, Payroll, TimeCard, and Work Order modules. To view information for all modules, click the File Layout and Program Information link on the Desktop's Resources page.

Job Export

Navigation

Select Visual Integrator Main menu > Job Export.

Overview

Use Job Export to output the definition information for one or more jobs to a specified file. The definition information can then be imported into another system using Job Import. This task is useful when import and export jobs are defined at a separate system from those used to execute the jobs.

Job Import

Navigation

Select Visual Integrator Main menu > Job Import.

Overview

Use Job Import to import the definition information for one or more jobs from a file created by Job Export. This task is useful when you want to execute an import or export job that has been created on a separate system.