



## IMPORTING RECFIND'S DOCUMENT ABSTRACT FIELD IN TO THE METADATA PROFILE

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### **Introduction**

When designing the K1 database we intentionally gave no consideration to RecFind's data model because we wanted to create a highly optimised relational database. As a result the differences between the RecFind data model and the K1 data model are significant.

The RecFind2K1 conversion tries to import the RecFind data in the most appropriate way for the majority of customers but at the same time keeping with the K1 design. Because each customer uses RecFind differently and has customised what fields contain, it has meant that in some cases the RecFind2K1 conversion program will convert some RecFind fields inappropriately for your usage.

The new K1 data model is also designed to cater for a wider variety of information. This has meant that in some cases your RecFind data may now be stored across multiple tables. One example is document profile information, which is now stored in the EDOC and Metadata Profile tables.

### **The Document Abstract**

RecFind's document abstract is one field (out of several) which is converted to appear in the EDOC table, while other fields from the document profile are stored on the Metadata Profile record.

In RecFind a document profile may have multiple attachments yet users were only provided with a single abstract which had to apply to all the attachments. This caused frustration for many of our users therefore the K1 data model resolves this problem by giving each attachment its own abstract field.

Add-on K1 products such as GEM and RecCapture will also automatically populate the abstract field by extracting a segment of the electronic document or by detecting keywords within the captured e-mails and word processing documents. Had the abstract remained on the Metadata profile, K1 would not be able to provide accurate searching of EDOCs using the auto abstracted information.

Another issue with the RecFind data model was that an attachment couldn't exist without a Document profile. This meant that a lot of information was stored on the attachment record and on the document profile record, potentially creating conflicting information and prevented optimal searching.

For these reasons the RecFind2K1 conversion program is designed to store the document abstract on to the EDOC record. Should the profile have not had an abstract then a dummy EDOC was created.

If you don't intend managing EDOCs, the following procedure shows how to re-import the abstract field to the Metadata Profile Description field. However please ensure that you read the important notes below.

### **Important notes**

- This process reconverts the abstract as it appeared at the time of the RecFind2K1 conversion, any changes made post conversion will not be retained.
- After re-converting the abstract you will need to hide/clear the Abstract field which appears on the EDOC to avoid confusion.

**IMPORTANT.** Do not delete any fields in the K1 data model, please only hide fields.

- This same process can not necessarily be used for other fields. Triggers may refer to certain fields and altering where the data is stored will prevent the processing logic from occurring.

For example, the Reply Due located on EDOC is automatically calculated based on the Document Type field. Dates will not be automatically calculated if these fields are moved to the Metadata Profile table.

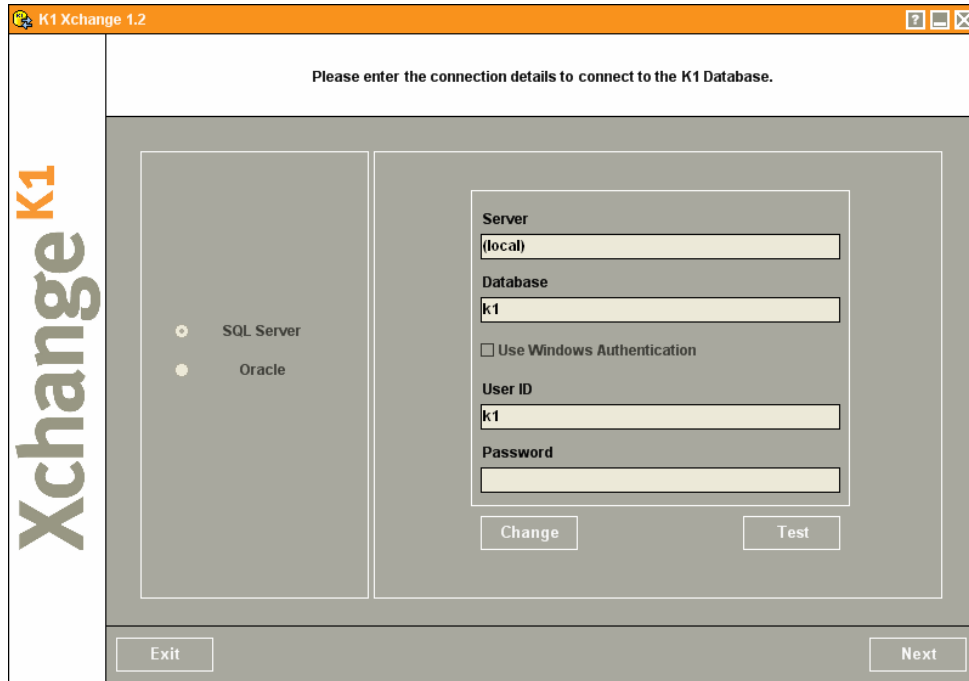
- Should you wish to expand in to electronic document management in the future you will need to re-implement the abstract field located on the EDOC table.
- K1 add-on products such as RecCapture and GEM will continue to populate the abstract field located on the EDOC.
- By documenting the process we don't necessarily condone this configuration. For all the above reasons we suggest leaving the data model how it's intended to be, however K1 is an open solution where you have the power to reconfigure it as you see fit.

You must however always accept the consequences of the configuration changes you make. Knowledgeone Corporation can not be responsible for your database design. Any changes should be carefully planned and tested to ensure no negative effects have occurred, and ALWAYS have a backup.

## Importing the Abstract field

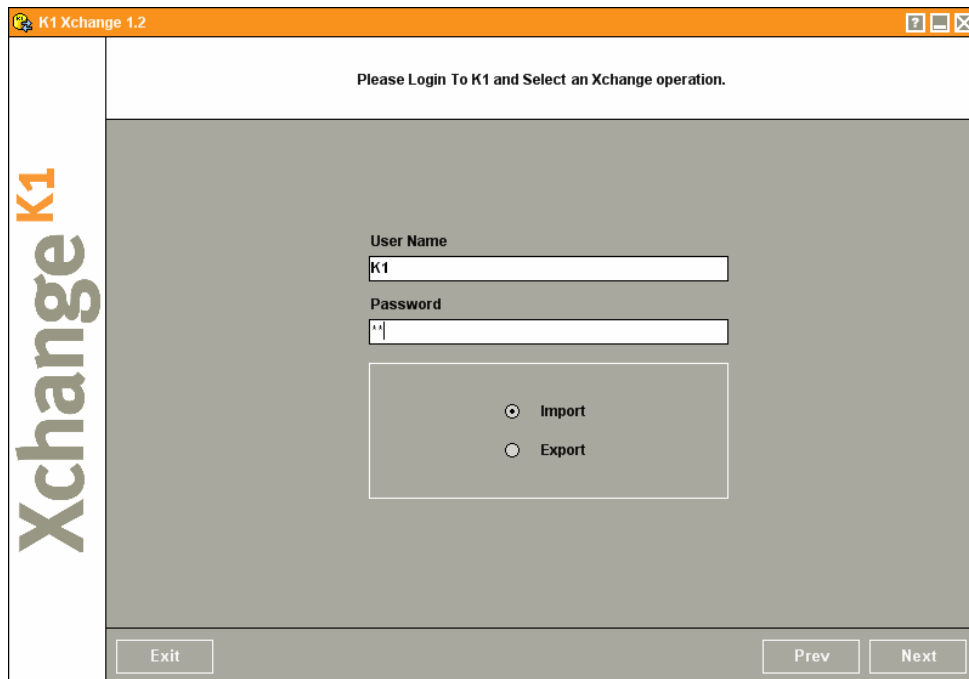
We accomplish this using the K1 Xchange module, K1's included import/export utility. If you have not installed it, please refer to the Installation Guide for installation instructions.

1. Open Xchange and specify the connection properties for the K1 database



The screenshot shows the 'K1 Xchange 1.2' application window. The title bar includes the application name and standard window controls. The main content area is titled 'Please enter the connection details to connect to the K1 Database.' On the left side, there is a vertical logo for 'Xchange K1'. Below the logo, there are two radio button options: 'SQL Server' (selected) and 'Oracle'. To the right of these options is a form with the following fields: 'Server' (containing '(local)'), 'Database' (containing 'k1'), 'Use Windows Authentication' (checkbox, unchecked), 'User ID' (containing 'k1'), and 'Password' (empty). Below the form are 'Change' and 'Test' buttons. At the bottom of the window are 'Exit' and 'Next' buttons.

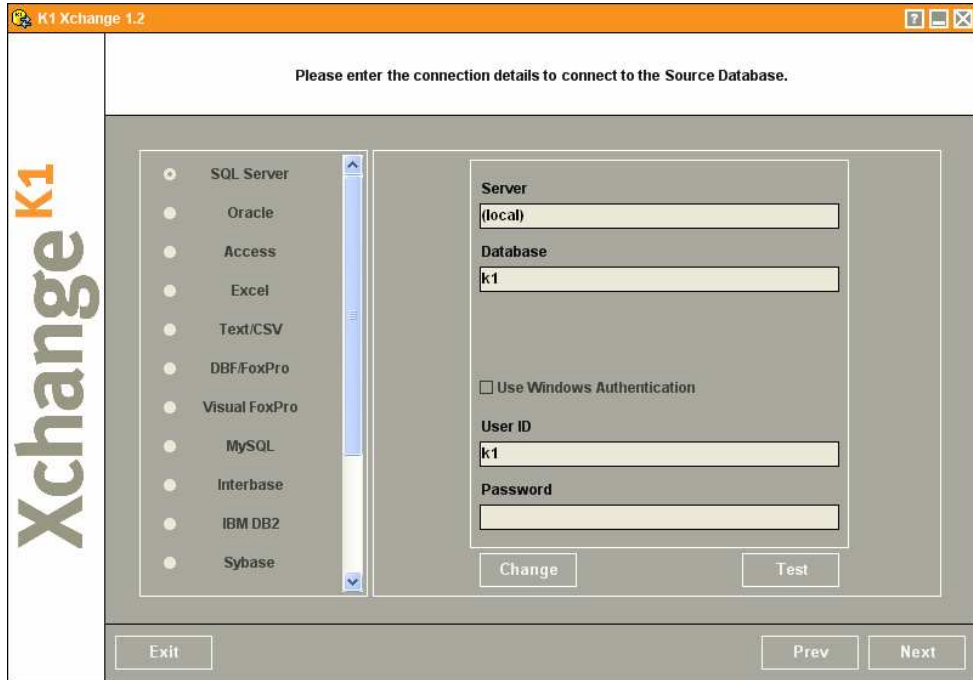
2. Log into K1 as a K1 administrator



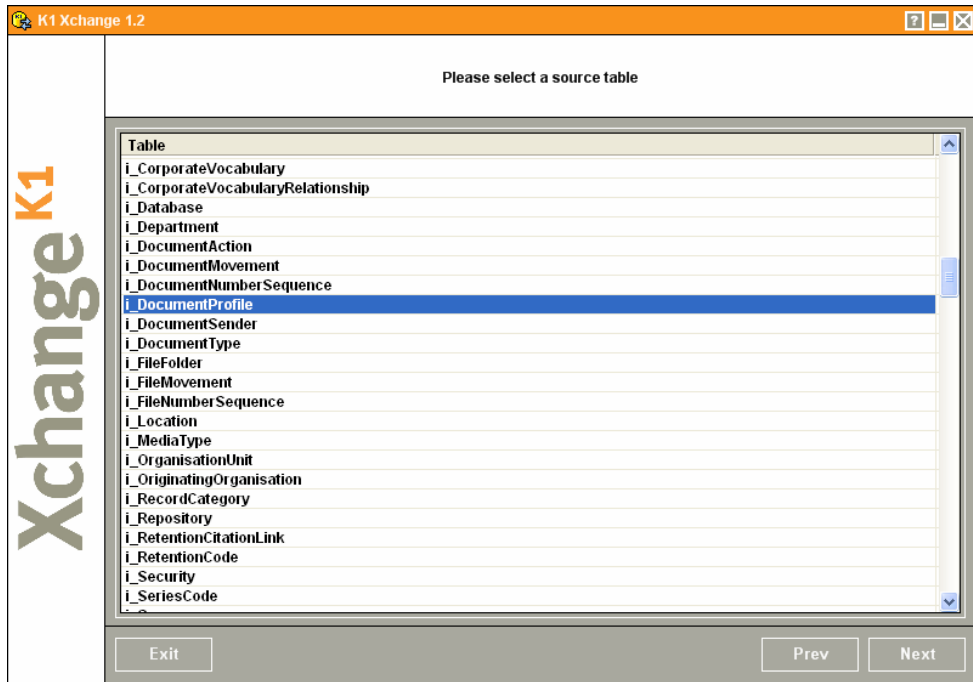
The screenshot shows the 'K1 Xchange 1.2' application window. The title bar includes the application name and standard window controls. The main content area is titled 'Please Login To K1 and Select an Xchange operation.' On the left side, there is a vertical logo for 'Xchange K1'. Below the logo, there are two text input fields: 'User Name' (containing 'K1') and 'Password' (containing two asterisks). Below the password field is a group box containing two radio button options: 'Import' (selected) and 'Export'. At the bottom of the window are 'Exit', 'Prev', and 'Next' buttons.

3. During the RecFind2K1 conversion information is stored in temporary tables. This procedure relies on you not having deleted these tables since converting.

The source database will be your K1 database, supply the details of your K1 database when prompted for the source database.



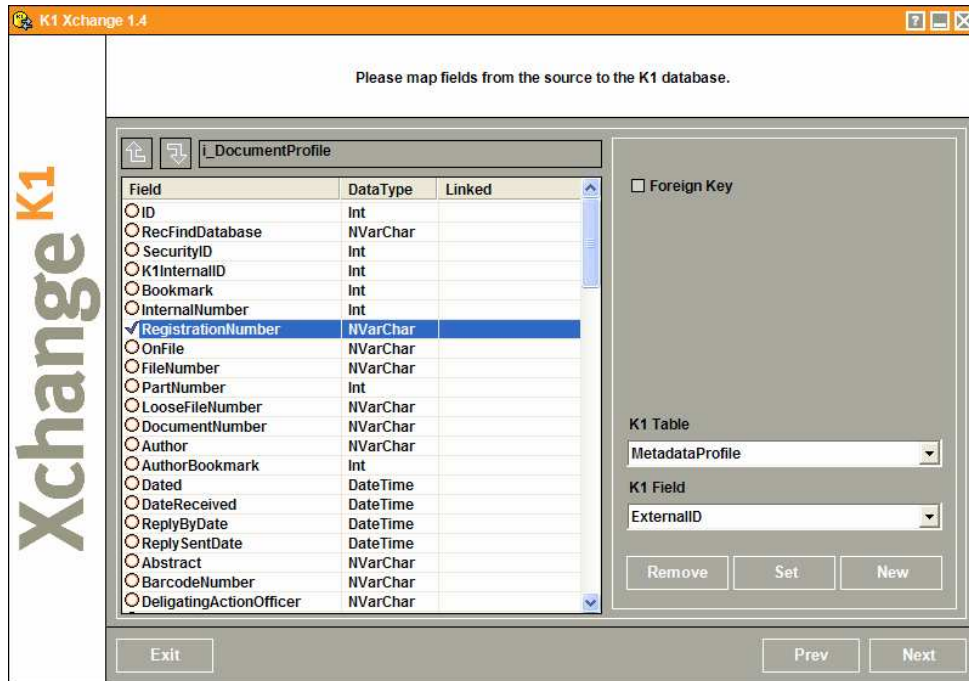
4. Select i\_DocumentProfile as the Source table. This is where all RecFind document profile information was held.



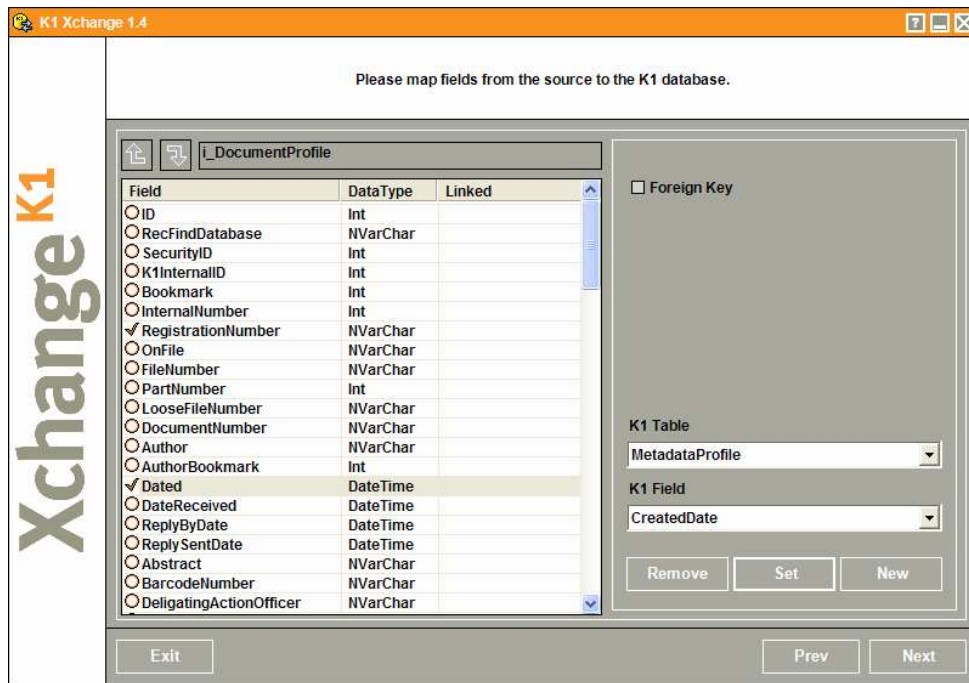
5. You now have to select the fields to import, including the fields which will be used to match up to the existing records.

Because the Registration Number may duplicate (ie. the same number may exist in a different RecFind database, or on a box or file folder) we will use the Registration Number and the Create Date. Although still possible to have records with the same Registration Number and Create Date it is unlikely.

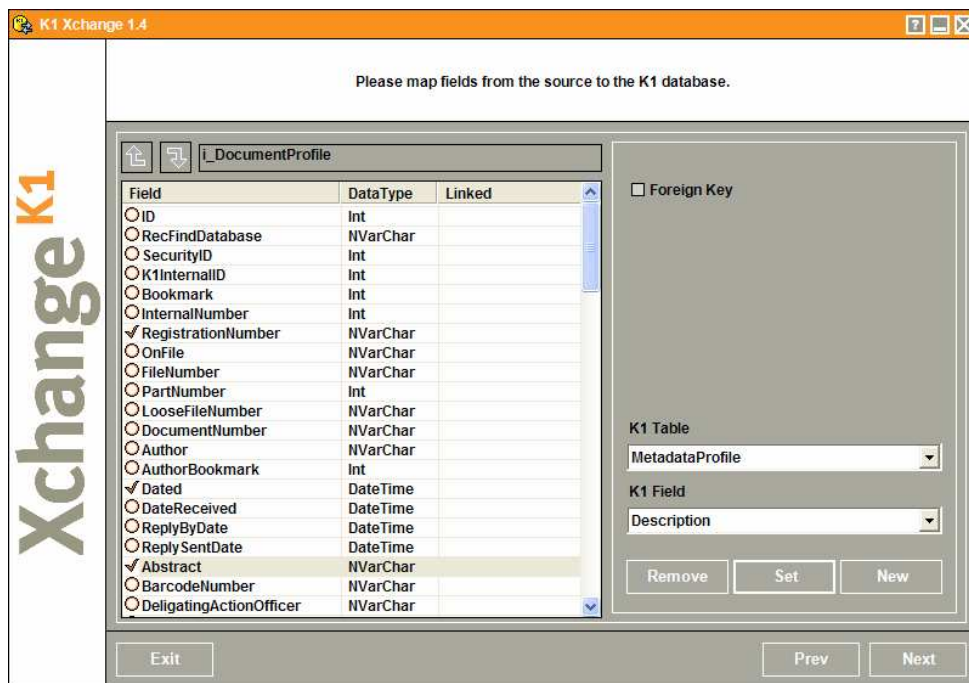
Map the RegistrationNumber field to the ExternalID field on the MetaDataProfile table in the K1 database – click the ‘Set’ button. See below.



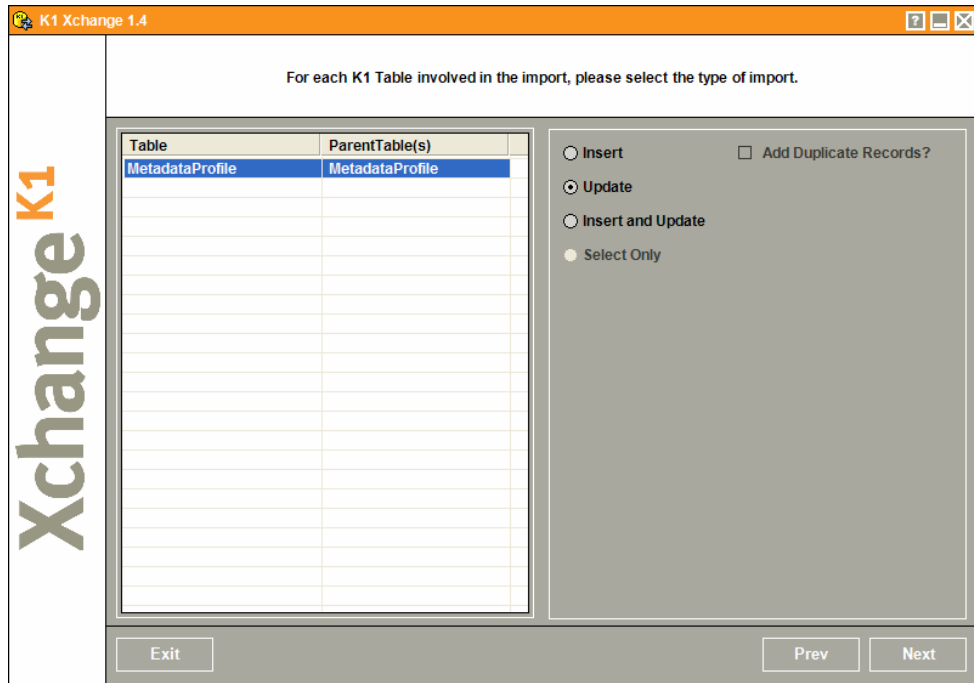
- Map the Dated field to the MetadataProfile CreatedDate field and click 'set'.



- Map the Abstract field to the Description field on the MetadataProfile table and click 'Set'



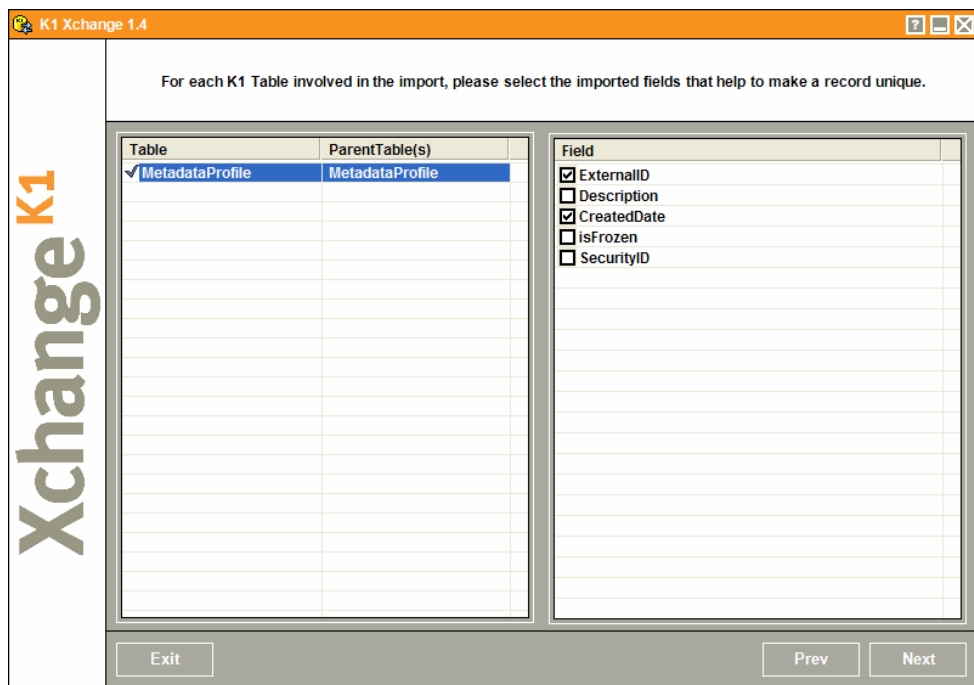
8. Click Next. Make sure the type of import is 'Update'



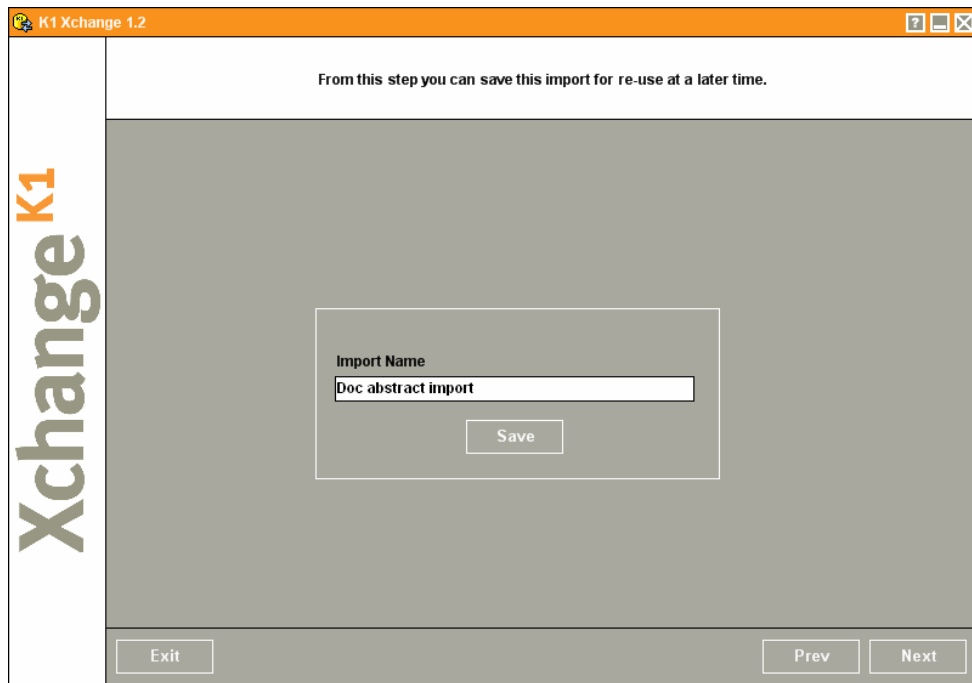
9. We now have to tell Xchange how it knows which is the matching record within K1.

Select the ExternalID field and Createddate on MetaDataProfile as the unique record identifier.

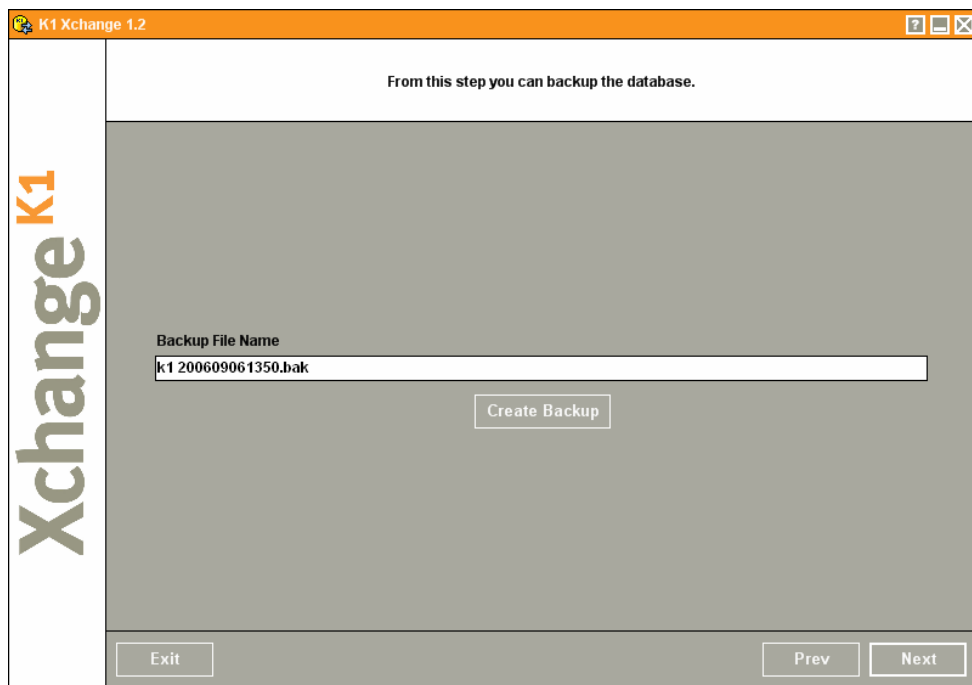
If you feel that there are other fields that would define the uniqueness of a document profile, you should include these in the import.



10. Save the import if you wish.



11. Take a Backup of the Database at this point if you haven't already done so.



12. Click the Import Button to commence the import of the data.



13. The abstract will now be re-imported into the Description field of the Metadata Profile Document type.