

Engineering Base

Update of Customer-specific Elements

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1 Update of Customizing

The assistant serves to adjust the EB data stock of a customer's different sites. The basic idea in this context is that customers can have EB databases at more than one site which are not connected to, and therefore different from, each other. Using this function, customers are able to distribute items of their database to other sites or to adjust such items with other sites.

During the **Export**, objects of the database are offered for selection in the export dialog. The following objects can be exported from EB and imported into a target database:

- Projects (including specifications and typical projects)
- Device Master Data
- Dictionaries
- Type definitions
- Project templates
- Assistants
- Stencils
- Attributes
- Templates (configuration files)

Worksheet templates and the configuration of the tool palette, for instance, are not offered for selection.

During the export, you can already define how the exported objects are to be handled during the import (copy or overwrite) and whether this definition may still be changed on importing the data.

On importing the data, it is displayed for every object which import mode (copy or overwrite) was preset during the export. You can still change the presettings if this was permitted during the export.

Moreover, on importing the data, you can select from the objects overview which objects you want to import and which objects you do not want to import. To not import an object, uncheck the check box to the left of the object.

The assistant is started from the database in the EB Explorer. In the **File** menu, the following two functions are available:

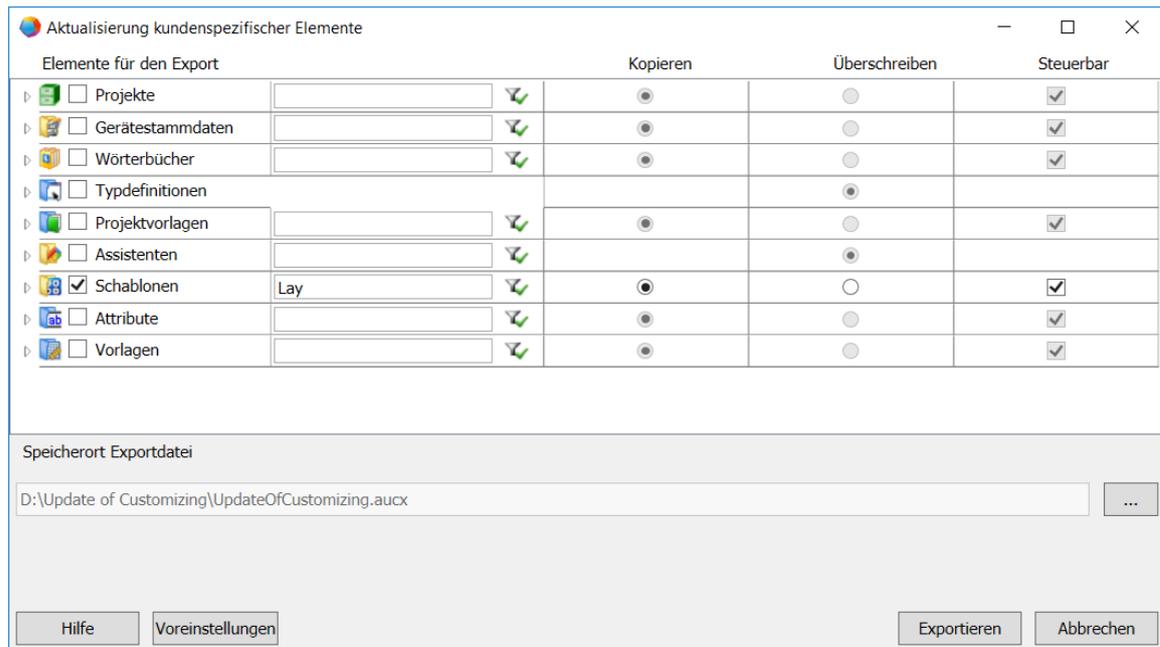
- [Export Customizing](#)
- [Import Customizing](#)

1.1 Export Customizing

To run Export Customizing

1. In the EB Explorer, select the database.
2. On the **File** menu, click **Export Customizing**.

In the **Export dialog**, all relevant objects of the EB database are automatically displayed in a tree structure.



You can open a folder to display the items contained therein.

Via the **Preset** button, you can load a previously defined configuration.

3. Under **Items for export**, select the objects to be exported.
 - All objects can be selected or deselected individually.
 - If you check a system folder or a folder, all of its sub objects are also checked.
 - In the field, you can enter a filter term for every system folder. The filter is applied to the names of the objects. In that case, only those objects that match the filter are exported.
Examples:
 - "Lay" - all objects with a name starting with "Lay" are exported.
 - "*out" - all objects with a name containing the letter combination "out" are exported.
4. Define the options for the subsequent import.

If you select an object, options to define the behavior during a subsequent import become active at the right-hand side.

Copy	On importing the data, the object is copied into the target database as a copy. This option is preset for all objects except for type definitions and assistants.
Overwrite	On importing the data, a check is made to verify whether there is an existing object with the same name in the target database. If this is the case, the imported object overwrites the object in the target database. If the object does not exist in the target database, it is created. For objects in the system folders Type Definitions and Assistants , you can only select the option Overwrite .
Controllable	On importing the exported data, the import mode (copy or overwrite) can only be changed if this option is checked. The import mode is provided as a presetting on importing the data at a later stage. This option is preset for all objects that can be copied. If this option is not checked, the import mode cannot be changed on importing the data.

- In row **Export file location**, click the button and, in the file selection dialog, define the storage location and the file name of the aucx export file. **UpdateOfCustomizing.aucx** is preset as file name.
- Click **Export** to start the export process.
A progress indicator displays the progress of the export. Via the **Cancel** button in the progress view, you can cancel the export process.
- Click **Cancel** to exit the assistant.

The buttons and their meaning

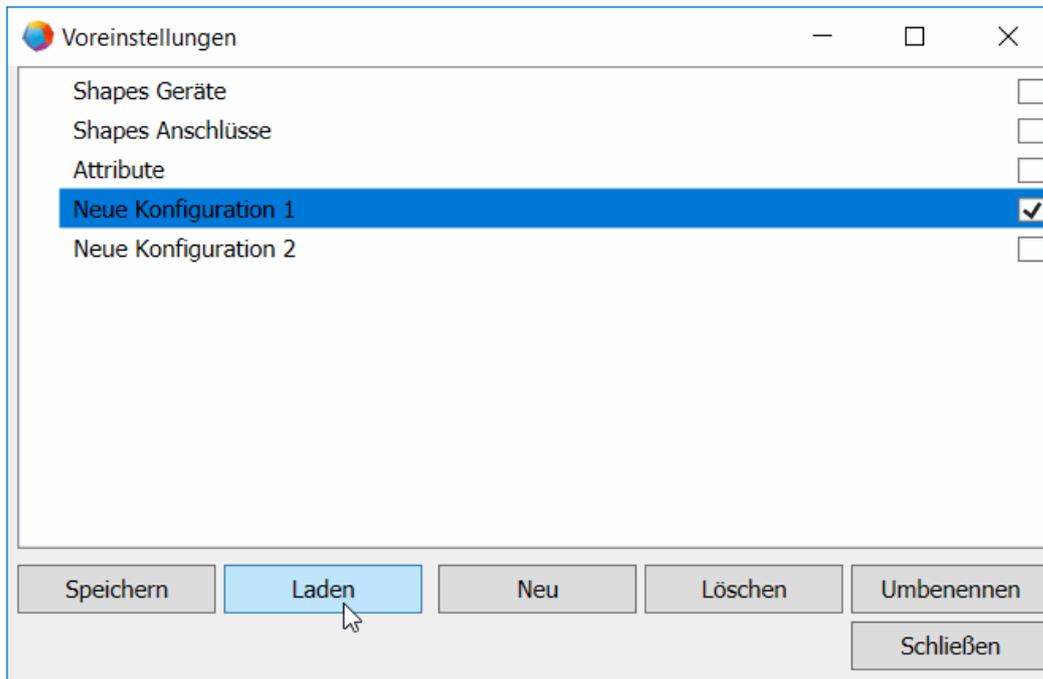
Help	Opens the help page with information on the assistant.
<u>Presets</u>	Opens a dialog to save or load existing configurations for the export.
Export	Starts the export process.
Cancel	Ends the assistant.

1.1.1 Presettings for the Export

Via this button, you load an existing configuration or save the current configuration. This enables you to create individual configurations for different data packets.

To save or load an export configuration

- Start **Export Customizing** from the database.
- Click the **Presets** button.



The buttons and their meaning are explained in the subsequent table.

Save	The configuration defined in the Update of Customizing dialog for items to be exported is saved into the selected configuration. On saving, the object IDs of the selected items are stored. Thus, an update of the configuration does not apply if the objects are re-named. Prior to overwriting an existing configuration, a confirmation prompt is displayed. If there are no configurations yet, create a new one via New .
Load	The selected saved configuration is loaded and displayed in the Update of Customizing dialog. On loading a configuration, it is checked whether objects contained therein already exist in the database. If this is not the case, a list of missing objects is displayed in a message dialog. These objects are then also no longer available for selection for subsequent export and import operations.
New	Using this button, a new configuration named New Configuration n is created.
Delete	The selected configuration is deleted.
Rename	The selected configuration can be renamed.
Close	Ends the Presets dialog.

1.1.2 Details Concerning the Export

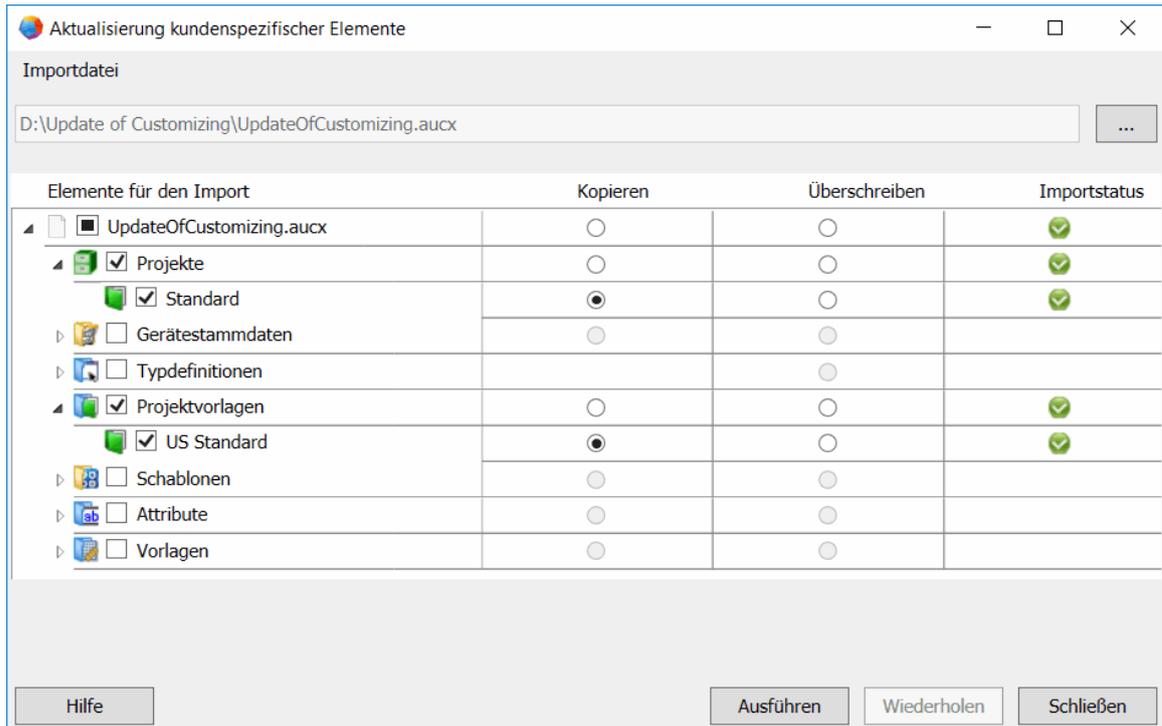
- During export, export related information is stored in the system folder **Messages**. For each executed export, a folder is created in the sub-folder **Update of Customizing - Export Customizing**.
 - The name of the folder is composed of the export date (dd.mm.yyyy), the time and the user ID of the user who started the export process.
 - For each exported object (project, catalog, dictionary, project template, and so on), a sub-folder is created containing all exported items of this object.
- **Projects and project templates** keep their associations with dictionaries, preferred catalogs, specification catalogs, preferred master shapes, stencils and typical projects.
- On exporting **Type Definitions**, all attributes pertaining to the type definition are also exported.
- On exporting **Attributes**, all formulas and associated assistants are taken into account.
- **Catalogs** maintain their associations with dictionaries.
- **Projects, project templates** and **Catalogs** are exported with their dictionary references, but without their dictionaries. On importing the data, the association with the dictionary is restored. The dictionary is identified via its name and its dictionary ID. If a project and its related dictionary are exported at the same time, the import automatically recognizes their relation and makes the respective presetting in the dictionary association dialog.
- **Copy Bins** below equipment, functions and documents are included in the export. To avoid the transfer of unnecessary data, it is recommended to check and, where necessary, to delete the data.
- The content of the **Messages** folder is included in the export. It is recommended to check and, where necessary, to delete the folder.

1.2 Import Customizing

Using the import function of the **Update of Customizing Assistant**, you can import data into your project across databases.

To run Import Customizing

1. In the EB Explorer, select the database.
2. On the **File** menu, click **Import Customizing**.



3. In line **Import file**, select the file to be imported via the button.

After the selection of the import file, all objects that are contained in the import file are displayed in a tree structure in the dialog. Open the folders to select or deselect individual objects.

If you check the check box in front of the import file or in front of another folder, all sub-objects are automatically selected for the import.

4. Select the import mode (Copy or Overwrite).

The radio buttons in the columns are initialized with the settings defined during the export. You can change this presetting if **Controllable** was checked on exporting the object.

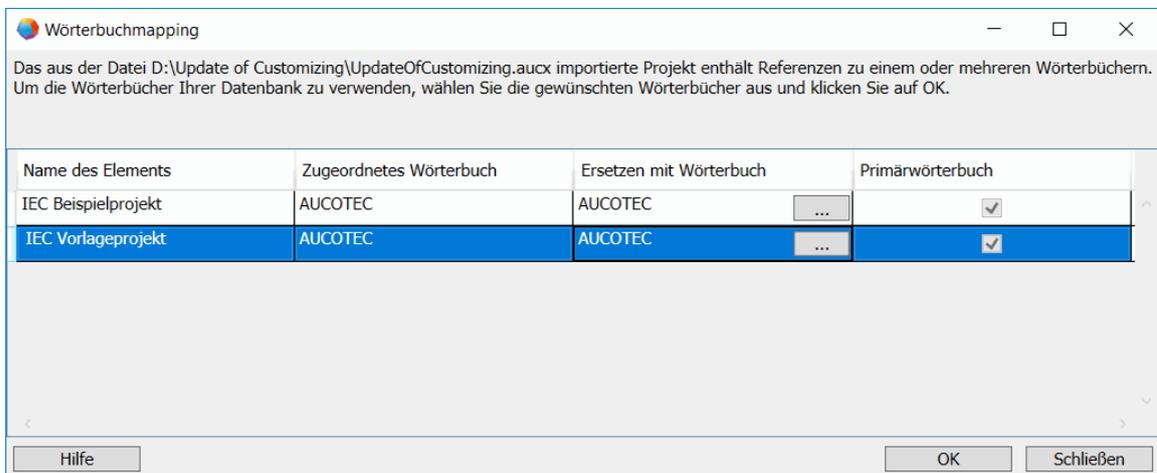
Copy	The object is copied into the target database. If there is an object with the same designation in the target database, a consecutive number is added to the name of the object.
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Overwrite	<p>If an object already exists in the database, it is overwritten during the import.</p> <p>Overwritten objects are deleted and cannot be restored. For the identification, an EB-internal ID is checked, then the folder structure and the object designation are checked for equality.</p> <p>If the object does not yet exist in the target database, it is created.</p> <p>Associations of the object with catalogs, dictionaries and so on are adopted from the imported object.</p>
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5. Click **Start** to start the import process.

If there are dictionary references in the projects selected for the import, the **Dictionary Mapping** dialog is opened before the data import.

In the dialog, all dictionaries referred to in the projects are listed in column **Associated dictionary**.



In column **Replace with dictionary**, a suggestion is automatically made for every dictionary if the name of the dictionary contained in the import file unambiguously matches the name and the dictionary ID of a dictionary in the database.

- In column **Replace with dictionary**, click the  button if you want to replace the dictionary of the import project by another dictionary of the target database. In the **Select Dictionary** dialog, select the required dictionary.
- In the **Select Dictionary** dialog, click **OK** to start the import process, or click **Close** to end the dictionary mapping.

During the import, the column **Import Status** indicates whether an object was successfully imported or if errors occurred. A yellow status display at a folder indicates that some child objects have not been imported. You will find detailed information on all imported objects and, if applicable, errors in the **Messages** folder.

Users must have write access to the data areas into which the data is imported. If they do not have that write access, it is highlighted in the import dialog. The import for any other items is executed.

The buttons and their meaning.

Start	Starts the import process. A progress indicator displays the progress of the overall import process.
Retry	After a first import that contained errors or was only partly successful, you can start the import anew. During the first import, the button is inactive.
Close	Ends the assistant.
Cancel	During the import, the Cancel button replaces the Close button. Using this button, you can cancel the ongoing import process. A respective confirmation prompt is shown. If you confirm it, the import is canceled with the last ongoing object import being finalized.



It is impossible to **Undo** an import.

1.2.1 Details Concerning the Import

During the import, other EB users can access the database in an unlimited way, as long as they only access data that is not affected by the import. At the start of the import process, those data areas that are to be overwritten via the **Overwrite** option (e.g. projects, catalogs) are exclusively locked.

- For every object, a **Message Object** is saved in the Messages folder during the import.
For each executed import, a folder is created in the sub-folder **Update of Customizing - Import Customizing** .
 - The name of the folder is composed of the import date (dd.mm.yyyy), the time and the user ID of the user who started the import.
 - For each imported object (project, catalog, dictionary, project template, and so on), a sub-folder is created containing all imported items of this object.
- On importing data, projects, project templates and catalogs keep the existing folder structure.
- On importing projects, project templates and catalogs with associations with dictionaries, a mapping dialog is offered and the associations are restored.
- Dictionaries are identified via their name and dictionary ID. If the associations cannot be restored in a unique way, a placeholder dictionary is created.
- On importing dictionaries, the content of the dictionaries of the import file is also imported. However, the associations of the dictionary with the projects in which it was used are still taken over from the target database.
- Associated attributes are also transferred, and they overwrite existing attribute definitions. If an attribute does not exist in the target database, it is created.
- Attributes with formulas or associated assistants are replaced using the **Overwrite** option, or they are newly created using the **Copy** option.
- Type definitions and assistants are never copied, but always overwritten. The related attributes are also transferred, and they overwrite existing attribute definitions. Attributes that do not yet exist in the target database are created.

However, imported type definitions do not update already existing dialogs in the projects; instead, they only become effective for newly created objects.

- If a stencil is added, an index is added to its name, e.g. (1), in case there already existed a stencil with the same name.
- On **Copying** customized attributes (attribute ID / AID \geq 100.000), it is checked whether their identifying properties (designator, type, formula, assistant,...) are identical. For attributes identified as being identical, the attribute definition available in the target is used for the **Copy** process. User attributes that do not yet exist in the target database are added during the copy process and thereby may get a new AID.
- On **Overwriting** customized attributes, it is checked whether the **Designation** and the **Type** are identical. If they are identical, the following data in the target database is overwritten:
 - Data Service (eCl@ss)
 - Assistant
 - Formula
 - Unit Group
 - Length

If an assignment is not possible by comparing the designation and the type, the import for this attribute definition is skipped and reported as an error.

- All data is immediately valid after the termination of the import process, even if the import assistant is still opened.
- Information on access permissions of users on objects is not transferred from the source objects to the target database. After the import, all data can be accessed without restrictions.
- The import process can be canceled at any time. Already started actions will be finished and the resulting data will be consistent in any case.