

File	Last Upload Time	Last Upload Results
IT Data.xls	5/22/2018 4:39:05 PM	This workbook has been successfully uploaded.
BalancedScorecard.xls	5/22/2018 4:38:34 PM	This workbook has been successfully uploaded.
Monthly Sales Report.xlsx	5/16/2018 10:08:13 AM	This workbook has been successfully uploaded.
Acct_Expenses.xlsx	5/16/2018 10:07:19 AM	This workbook has been successfully uploaded.

iDashboards Auto Uploader (IAU) Manual

Version 11.3

iDashboards Auto Uploader Manual

No part of the computer software or this document may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, or by any information storage and retrieval system, without permission in writing from iDashboards. The information in this document is subject to change without notice. If you find any problems with this documentation, please report them in writing to support@iDashboards.com. iDashboards does not warrant that this document is error free.

Copyright © 2004 - 2022 iDashboards. All rights reserved.

Trademarks:

The iDashboards logo and tagline are trademarks of iDashboards.

All other products and company names referenced herein are the trademarks of their respective owners.

Support information:

iDashboards
900 Tower Drive, 4th Floor
Troy, MI 48098

Phone: (248) 528-7160
Fax: (248) 828-2770

Email: support@iDashboards.com
Web site: <http://www.iDashboards.com>

1. Introduction

The iDashboards Auto Uploader (IAU) allows for direct uploading of the following file types from a client machine to an iDashboards server without requiring the user to log into iDashboards Application. The files can be uploaded immediately using the IAU or they can be scheduled for repeated uploads using a scheduling mechanism

- Excel Workbooks
- Delimited Text files
- Fixed Position Text files
- Regular Expressions Parsed Text files

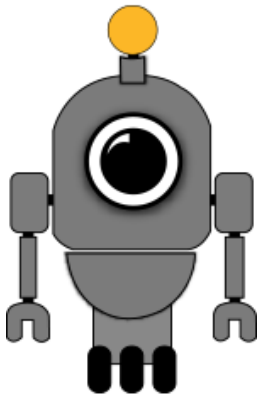
2. Product Type and Support

2.1 Product Details

Not all features discussed in this manual are available on every version of iDashboards. Please refer to the iDashboards website to learn more about the differences.

<http://www.idashboards.com/pricing/>

2.2 OSKAR



OSKAR, the Online Support & Knowledge Acquisition Repository, is the preferred support resource for iDashboards' customers, partners and prospects. The OSKAR Support Portal can be used to submit, review and update support tickets.

<https://oskar.idashboards.com/>

Those who have an active, support and maintenance contract with iDashboards also have access to the following content in our User Community:

- **Knowledge Base** – Numerous product and technology articles for your review.
- **Community** – Forums and discussion groups for customers to discuss various topics and products amongst themselves.
- **Resources** – Many downloadable resources that can be used with iDashboards.
- **Ideas** – Area for customers to submit feature requests and great product ideas.
- **Blog** – Thoughts, stories and ideas on data and dashboards

3. System and User Requirements

The IAU has the following minimum system requirements:

- 64-bit Microsoft Windows 7 or 64-bit Windows Server 2008 R2
- Microsoft .NET 4 Framework – Full profile
- Amount of RAM determines ability to upload large files

It also requires that the user running the program to have administrator privileges on the PC for which the IAU is installed. These elevated privileges are necessary to create and execute tasks in the Windows operating system.

4. Installing the iDashboards Auto Uploader

The installation wizard is a 64-bit installer, but the application itself can install 32-bit or 64-bit components to match existing installed drivers. The application will be installed into the determined “bitness” folder of Programs Files into a directory path defined as:
\\iDashboards\\iDashboards Auto Uploader.

After the application is successfully installed, an iDashboards folder will appear in the Windows Program Menu containing a shortcut to the application itself as well as the manual.

5. Login Credentials

When the application is launched for the first time, the user will be prompted for their iDashboards login credentials. These are the credentials used to log into either:

- iDashboards Enterprise (On-Premises)
 - iDashboards Data Hub or Administrative Application
 - User Role default values: Admin, Data Admin or Analyst
 - *The minimum required role for using the Auto Uploader can be configured within the Administrative settings. For example, setting the value to 'Viewer' would allow users to utilize this application.
- iDashboards Professional (Cloud)
 - iDashboards Cloud Admin Application
 - User Roles: Cloud Admin or Data Analyst

This is the only time the user will be asked for their credentials, all subsequent upload requests will be made using these credentials.

6. Server URL

A user can change server URL or the login credentials through the IAU application settings. The application settings are accessible by clicking the “gear” icon at the far right of the application tool bar.

6.1 Server URL

The Server URL is dependent upon the type, and location of your iDashboards product. Example server URL’s might include the following options:

- iDashboards Enterprise (On-Premises)
 - <http://<dashmachine:8080>/idashboards>
 - <http://<dashmachine:8080>/idbdata> (if the Data Hub is installed)
 - To determine the exact URL:
 - From the iDashboards Administrative Application, navigate to Imported Data > Excel Data or Imported Files. From there select the Auto Uploader button.
 - From the iDashboards Data Hub, to Imported Data > Excel Data or Imported Files. From there select the Auto Uploader button.
- iDashboards Professional (Cloud)
 - <https://cloud.idashboards.com/cloudadmin>
- iDashboards Professional Evaluation (Cloud)
 - <https://eval.idashboards.com/cloudadmin>

Once the URL has been identified, set the application settings “Server URL” value and click “Save”.

7. Immediate File Uploads

Files can be uploaded directly to the iDashboards server by selecting the “Immediate” tab. The amount of time to upload a file is based on several variables, mostly file size. Upon uploading a file, the user will be presented with an “Upload Successful” window.

Upload New File – Expand the “Upload” list and select “New”. Then choose either “Excel File...” or “Text File...”. Follow the instructions to locate and upload the file.

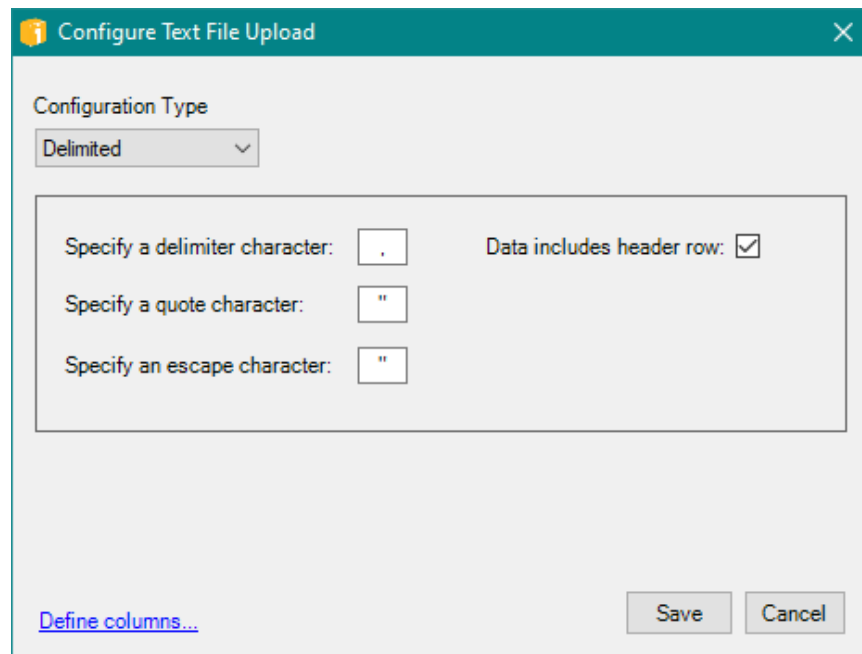
Upload File from List – If the file already exists in the list, right-click the file and select “Upload”. Alternatively, left-click the file and then from the “Upload” drop-down menu, choose “Selected”.

Delete File from List – Right-click the file and select “Remove”. This does not delete the file from the file directory, this will only remove the file from the uploader list. Use this for files that no longer exist.

7.1 Text File Configuration

How a Text File is parsed, can be controlled through either the “Configure” button of a Text File direct upload, or right-clicking on an existing file and select “Configure...”.

For Delimited Files, user can define the columns, either in the file as a header record, or using the Imported File Configuration. Using this, a delimiter is specify and whether there is a header row. The default file extension is .csv. This is the default configuration:



Configure Text File Upload

Configuration Type
Delimited

Specify a delimiter character: ,

Specify a quote character: "

Specify an escape character: "

Data includes header row:

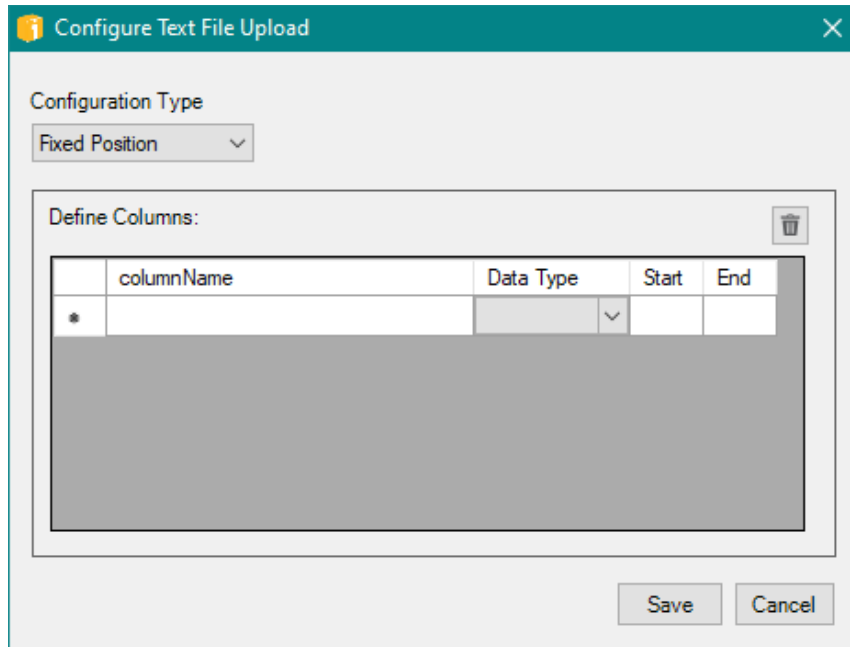
[Define columns...](#) Save Cancel

If no columns are defined, the columns names and data types are inferred from the data. This is based on whether there is a header row and the `idbdata.text.max.rows.to.scan` setting in the `ivizgroup` property file. The default for this property is -1, which means scan all rows to determine the data type. If columns are defined, they take priority over inferred columns.

For Fixed Position files, all column must be defined using the Imported File Configuration. The default file extension is .txt. This is the default configuration:

If no columns are defined, the columns names and data types are inferred from the data. This is based on whether there is a header row and the `idbdata.text.max.rows.to.scan` setting in the `ivizgroup` property file. The default for this property is -1, which means scan all rows to determine the data type. If columns are defined, they take priority over inferred columns.

For Fixed Position files, all column must be defined using the Imported File Configuration. The default file extension is .txt. This is the default configuration:



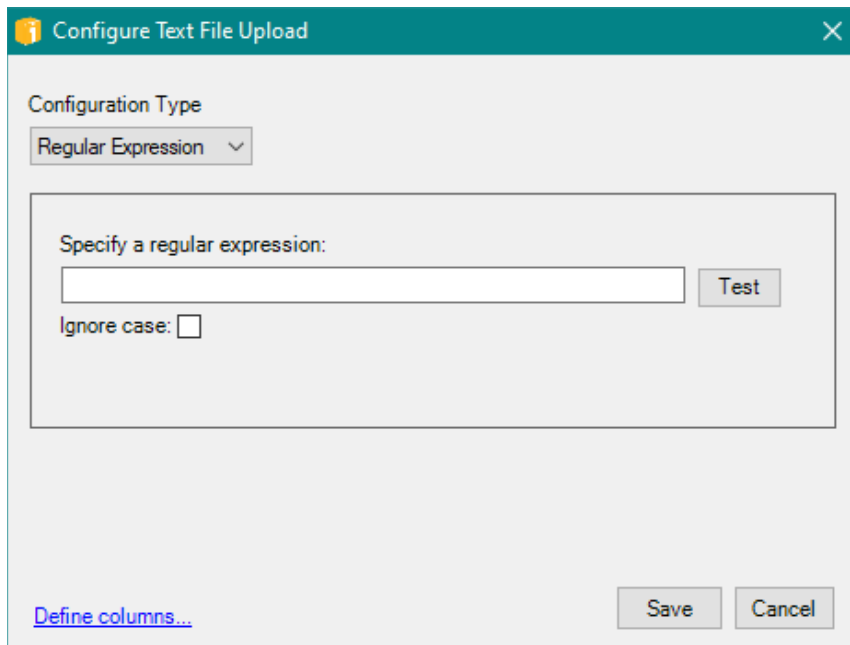
The screenshot shows the 'Configure Text File Upload' dialog box. The 'Configuration Type' is set to 'Fixed Position'. Below this, there is a 'Define Columns:' section with a trash icon. It contains a table with the following structure:

	columnName	Data Type	Start	End
*		▼		

At the bottom of the dialog are 'Save' and 'Cancel' buttons.

For Regular Expression files, using the Imported File Configuration, a regular expression is provided along with capture groups. The Regular Expression pattern does not need to specify the entire string, but it does need to specify a substring, by using non-capture groups if necessary.

If not provided, the column names will be Column1, Column2, Column3, etc. Data types will be inferred from the data based on the `idbdata.text.max.rows.to.scan` setting, in the `ivizgroup` property file. The default for this property is `-1`, which means scan all rows to determine the data type. If column definitions are provided, the number of columns must match the number of capture groups. This is the default configuration:

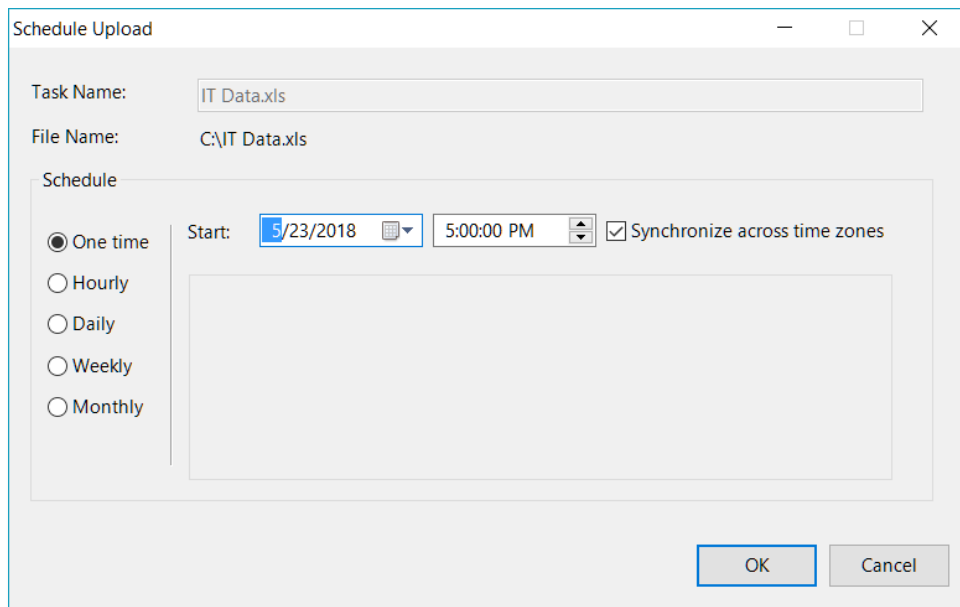


The screenshot shows the 'Configure Text File Upload' dialog box. The 'Configuration Type' is set to 'Regular Expression'. Below this, there is a 'Specify a regular expression:' section with a text input field and a 'Test' button. Below the input field is an 'Ignore case:' checkbox. At the bottom of the dialog are 'Save' and 'Cancel' buttons, and a link labeled 'Define columns...'.

8. Scheduled File Uploads

Files can be scheduled for automated upload to the iDashboards server by selecting the “Scheduled” tab. The amount of time to upload a file is based on several variables, mostly file size. Upon uploading a file, the user will not be presented with an “Upload Successful” window but there will be a field describing the “Last Run Results”.

New Upload Schedule – Click on the “New” button and select either “Excel File...” or “Text File...”. Follow the instructions to locate and define the upload schedule. After the file has been selected, a schedule for the upload can be established by clicking the “Schedule” button. The following scheduling dialog box will appear.



A file can be scheduled for upload according to one of the following schedules:

One time – The file will be uploaded once at the indicated time.

Hourly – The file will be uploaded at the indicated time and repeated based on the selected hourly value (1, 2, 4, 6 or 12 hours).

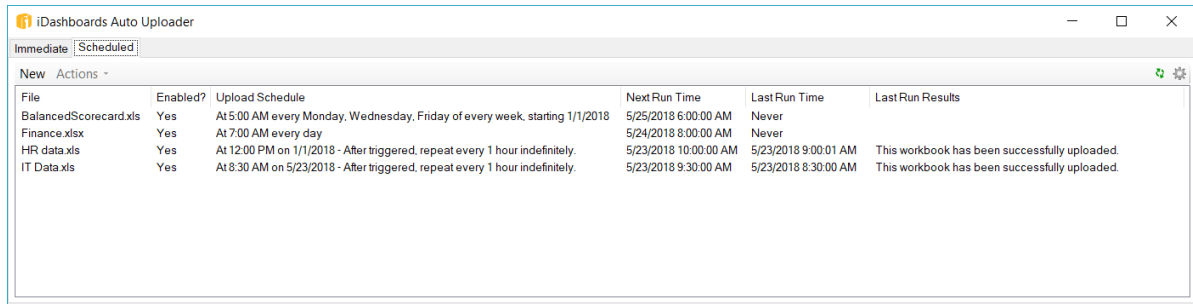
Daily – The file will be uploaded at the indicated time according to the day recurrence indicated.

Weekly – The file will be uploaded at the indicated time on the specified days according to the week recurrence indicated.

Monthly – The file will be uploaded at the indicated time in the specified months on the particular days selected.

9. Viewing Schedule Tasks

The files scheduled for upload appear in a list that is displayed when the application is first opened. A scheduled upload can be managed by first selecting the scheduled upload and either using the “Edit” drop-down menu or right-clicking and using the context menu.



The screenshot shows the 'iDashboards Auto Uploader' application window. The 'Scheduled' tab is active, displaying a table of upload tasks. The table has columns for File, Enabled?, Upload Schedule, Next Run Time, Last Run Time, and Last Run Results.

File	Enabled?	Upload Schedule	Next Run Time	Last Run Time	Last Run Results
BalancedScorecard.xls	Yes	At 5:00 AM every Monday, Wednesday, Friday of every week, starting 1/1/2018	5/25/2018 6:00:00 AM	Never	
Finance.xlsx	Yes	At 7:00 AM every day	5/24/2018 8:00:00 AM	Never	
HR data.xls	Yes	At 12:00 PM on 1/1/2018 - After triggered, repeat every 1 hour indefinitely.	5/23/2018 10:00:00 AM	5/23/2018 9:00:01 AM	This workbook has been successfully uploaded.
IT Data.xls	Yes	At 8:30 AM on 5/23/2018 - After triggered, repeat every 1 hour indefinitely.	5/23/2018 9:30:00 AM	5/23/2018 8:30:00 AM	This workbook has been successfully uploaded.

The options that are available for a scheduled upload are:

Upload Now – This option will immediately upload the associated file to iDashboards.

Schedule – This option will open the schedule dialog to allow the alteration of the upload schedule.

Disable – This option will disable the scheduled upload. A disabled upload will not be executed.

Export – This option will export the task associated with the scheduled upload to an XML document.

Delete – This option will delete the scheduled upload. The file associated with the upload will NOT be deleted.

10. Uninstalling the iDashboards Auto Uploader

The iDashboards Auto Uploader can be uninstalled using the “Uninstall or change a program” item under the Microsoft Windows “Apps & Features” (or “Add/Remove Programs”) settings. All scheduled tasks will be removed when the application is uninstalled. Schedules will not be removed when the product is upgraded.

11. Administrative Troubleshooting

11.1 32/64 Bit Systems

A 64-bit Operating System is required to install the IAU. However, applications and drivers can exist as 32-bit on those same computers. Therefore it should be noted:

- When Microsoft Office is not installed, then the 32-bit Access Connectivity Engine (ACE) driver is installed along with the 32-bit IAU installation.
- When Microsoft Office is installed as 32-bit application, and its 32-bit ACE driver is recognized, then the 32-bit ACE driver is used with the 32-bit IAU.
- When Microsoft Office is installed as 32-bit application, and its 32-bit ACE driver is NOT recognized, then the 32-bit ACE driver is installed along with the 32-bit IAU installation.

In environments with the 32-bit ACE driver, memory issues might exist for some ‘large’ Excel file uploads.

- To resolve memory problems:
 - Uninstall the IAU (which is 32-bit using the 32-bit ACE driver).
 - Uninstall the 32-bit ACE driver, if it was not part of Microsoft Office.
 - Install 64-bit ACE driver.
 - <https://help.idashboards.com/links/accessdatabaseengine/64>
 - Reinstall the IAU (which will now detect 64-bit ACE driver and therefore install as 64-bit).

When 32-bit Microsoft Office is installed and its ACE driver is recognized, upgrading to the 64-bit ACE driver could result in an error message stating “You cannot install the 64-bit version of Microsoft Access Database Engine 2010 because you currently have 32-bit Office products installed.” Upgrading to 64-bit Microsoft Office might not be practical, so there is a workaround to force the installation of the 64-bit ACE driver.

- Open the Windows Command Prompt (Run -> cmd).
- Change to the directory for the AccessDatabaseEngine_x64.exe file (cd Downloads).
- Run this command:

```
AccessDatabaseEngine_x64.exe /passive
```

11.2 Increase Workbook Extract (.wbx) file size

Note: iDashboards Professional (Cloud) has a maximum Excel file size limit of 10MB.

Note: Only iDashboards Enterprise (On-Premises) has the option to increase the maximum Excel file size limit. Check with your iDashboards administrator to determine accessibility to the installed server files.

Before increasing the file size limit, it is important to understand how the client and server handle the upload process. When the client computer is triggered to upload an Excel file to the server, a series of temporary files are created in the following folder location:

```
/Users/<username>/AppData/Local/Temp/
```

One file is the Workbook Extract (.wbx) file. It can be around 2 times larger than the original Excel file, and has a default maximum file size of 200 MB. This Workbook Extract file is what actually gets uploaded to the server. When this file size is exceeded there is an error message stating:

“The file to be uploaded is ###.##MB (###,###,### bytes), which exceeds the maximum file size of 200.00MB.”

You can override this default value by adding a property to the server's `ivizgroup.properties` file. The property is `WEBAPP_NAME.wbextract.upload.file.size.max`, where `WEBAPP_NAME` is either `idbdata` or `idashboards` (match this to the Server URL defined in iDashboards Auto Uploader Application Settings). The value needs to be accompanied with the unit value of GB, MB, KB or for an unlimited file size use `-1` without a unit value. Add the property to the `ivizgroup.properties` file, save and close it. There is no need to restart the iDashboards application Tomcat server.

NOTE: By default, iDashboards will look for the `ivizgroup.properties` file in the `<IVIZGROUP HOME>\config` directory. Refer to the Administrator Manual for details.

Examples of `ivizgroup.properties` entry:

```
# Maximum file size for Workbook Extract (.wbx) Upload to Data Hub.  
idbdata.wbextract.upload.file.size.max=1GB
```

```
# Maximum file size for Workbook Extract (.wbx) Upload to iDashboards.  
idashboards.wbextract.upload.file.size.max=-1
```

12. Frequently Asked Questions

Q: How does the IAU schedule tasks?

A: The IAU uses the Windows Task Scheduler that is built into Microsoft Windows. You can also view all tasks the IAU schedules by looking at the Windows Task Scheduler.

Q: Does the IAU need to be open and running for the scheduled uploads to execute?

A: No, but the computer with the schedule needs to be on and logged-in.

Q: What happens if a task is scheduled, but the spreadsheet it is supposed to upload is no longer present?

A: The task will run, but nothing will happen because the spreadsheet is not present. This will be logged in the IAU application beneath the column "Last Run Results".

Q: Where can I find technical information if my spreadsheet doesn't upload as expected or errors occur?

A: This information is written to the IAU log file located at `\iDashboards\iDashboards Auto Uploader\logs\uploader.log`. This information is best reviewed by iDashboards Technical Support.