

# OBTAIN Import/Export

Most organizations use a variety of systems and tools to run their business. Each tool generates its own data store. The OBTAIN Import/Export function lets you move device, cable or rack data into and out of OBTAIN.

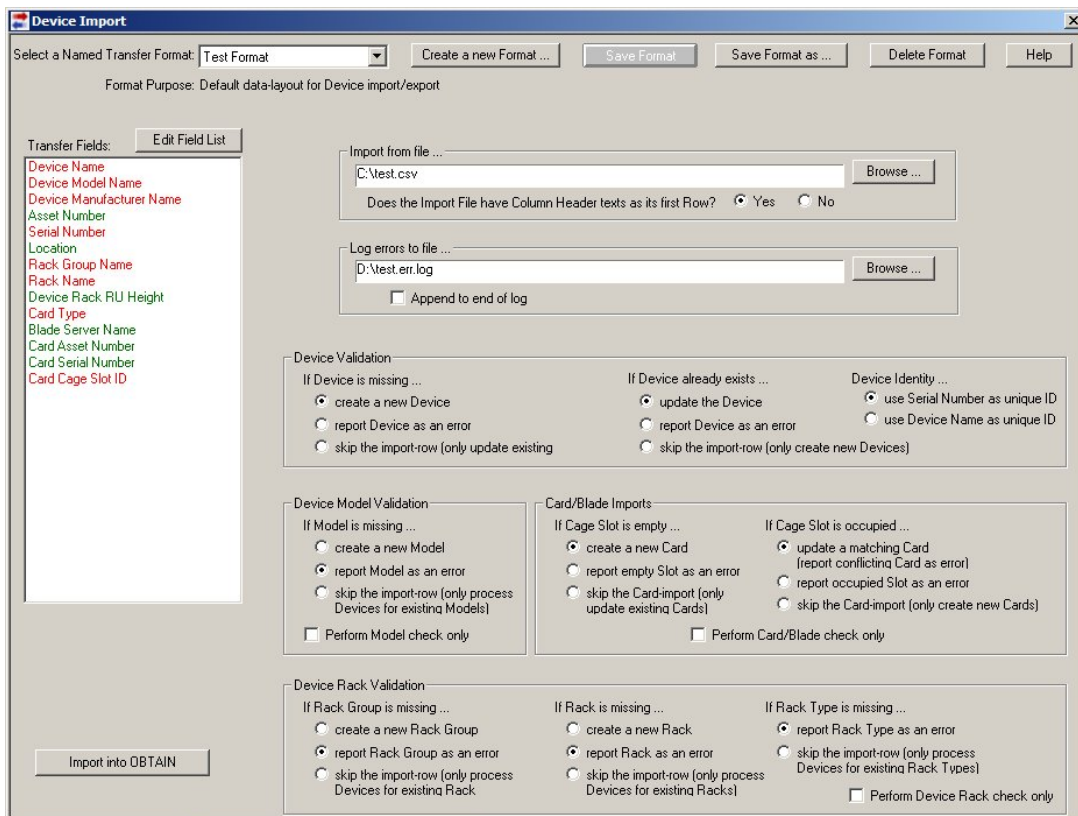
[Import](#)

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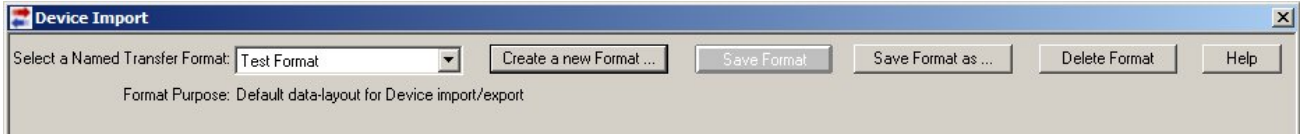
## Import

If you have data from an alternative source, you can import it into OBTAIN instead of having to re-enter all the information again. The Import function lets you quickly add new cables, devices or racks from a set of records previously created, or update existing records. Importing data is initiated by selecting **Transfer** from the Menu bar of the appropriate asset window.

## How to Import Data



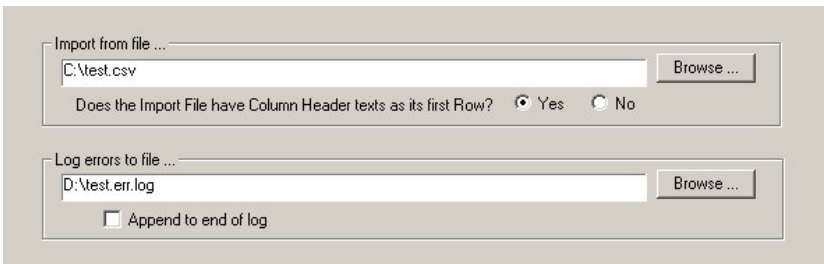
1. Create a Transfer Format Name. (Or select a previously saved format from the dropdown menu.)



2. Select the data fields to include in the import. Data Field selections will change depending on the asset type selected: device, cable or rack.



3. Select the file names of the text file and error/audit trail log to use for the import.



- 4. Specify the data validations. Data Validation controls what data is imported and how the error log is compiled. Data Field selections will change depending on the asset type selected: device, cable or rack.

<b>Device Validation</b>		
<b>If Device is missing ...</b> <ul style="list-style-type: none"><li><input checked="" type="radio"/> create a new Device</li><li><input type="radio"/> report Device as an error</li><li><input type="radio"/> skip the import-row (only update existing)</li></ul>	<b>If Device already exists ...</b> <ul style="list-style-type: none"><li><input checked="" type="radio"/> update the Device</li><li><input type="radio"/> report Device as an error</li><li><input type="radio"/> skip the import-row (only create new Devices)</li></ul>	<b>Device Identity ...</b> <ul style="list-style-type: none"><li><input checked="" type="radio"/> use Serial Number as unique ID</li><li><input type="radio"/> use Device Name as unique ID</li></ul>
<b>Device Model Validation</b>	<b>Card/Blade Imports</b>	
<b>If Model is missing ...</b> <ul style="list-style-type: none"><li><input type="radio"/> create a new Model</li><li><input checked="" type="radio"/> report Model as an error</li><li><input type="radio"/> skip the import-row (only process Devices for existing Models)</li></ul> <input type="checkbox"/> Perform Model check only	<b>If Cage Slot is empty ...</b> <ul style="list-style-type: none"><li><input checked="" type="radio"/> create a new Card</li><li><input type="radio"/> report empty Slot as an error</li><li><input type="radio"/> skip the Card-import (only update existing Cards)</li></ul> <input type="checkbox"/> Perform Card/Blade check only	<b>If Cage Slot is occupied ...</b> <ul style="list-style-type: none"><li><input checked="" type="radio"/> update a matching Card (report conflicting Card as error)</li><li><input type="radio"/> report occupied Slot as an error</li><li><input type="radio"/> skip the Card-import (only create new Cards)</li></ul>
<b>Device Rack Validation</b>		
<b>If Rack Group is missing ...</b> <ul style="list-style-type: none"><li><input type="radio"/> create a new Rack Group</li><li><input checked="" type="radio"/> report Rack Group as an error</li><li><input type="radio"/> skip the import-row (only process Devices for existing Rack)</li></ul>	<b>If Rack is missing ...</b> <ul style="list-style-type: none"><li><input type="radio"/> create a new Rack</li><li><input checked="" type="radio"/> report Rack as an error</li><li><input type="radio"/> skip the import-row (only process Devices for existing Racks)</li></ul>	<b>If Rack Type is missing ...</b> <ul style="list-style-type: none"><li><input checked="" type="radio"/> report Rack Type as an error</li><li><input type="radio"/> skip the import-row (only process Devices for existing Rack Types)</li></ul> <input type="checkbox"/> Perform Device Rack check only

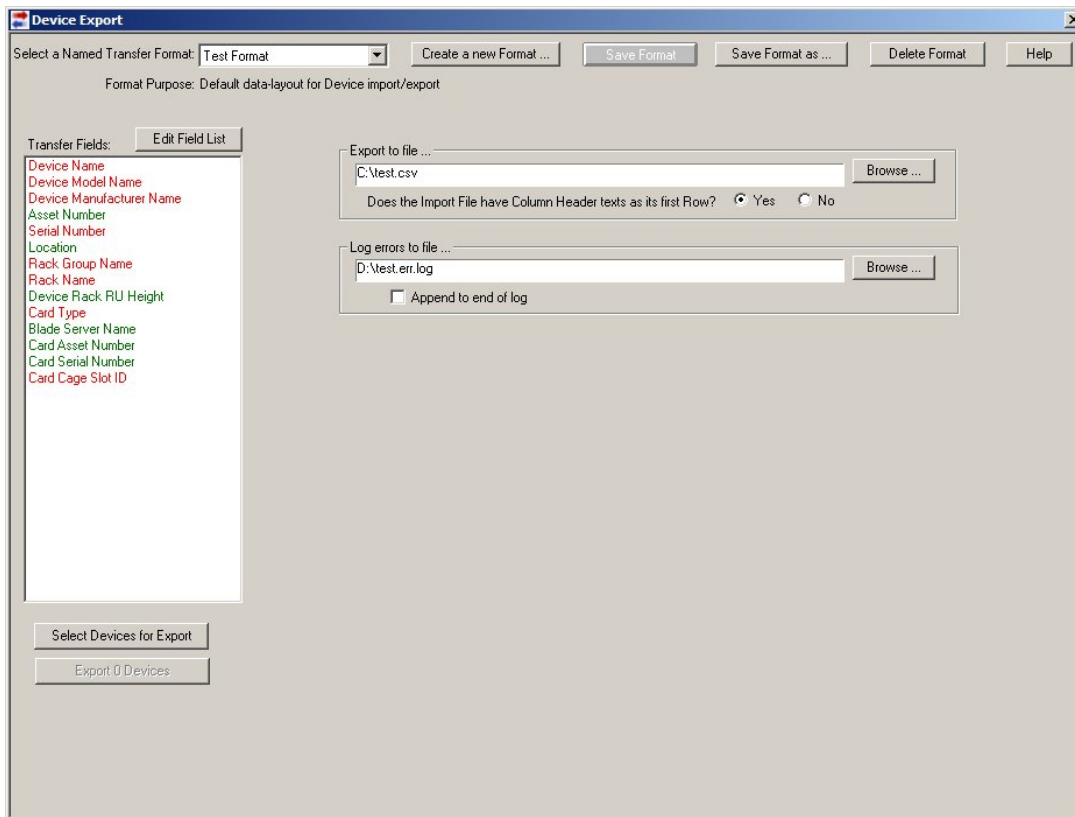
- 5. Click **Import into OBTAIN**

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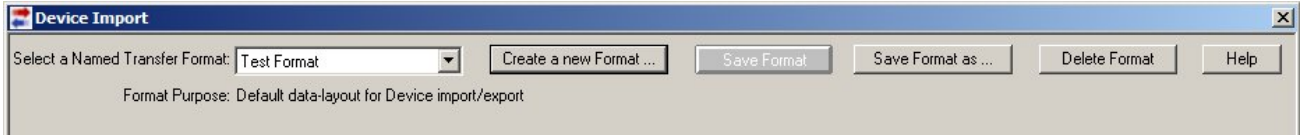
The OBTAIN Export Module allows users to export data from OBTAIN to a comma-separated values (.CSV) file for use with other applications running under different operating systems, or written by different software manufacturers. Exporting data is initiated by selecting **Transfer** from the Menu bar of the appropriate asset window.

To help narrow the focus when selecting the devices to be exported you can apply a filter so that the export includes only data that satisfies the criteria that you specify. For example, you may have a database that includes hundreds or thousands of devices. However, you want to export only a subset of those records. You can create a filter so that only that subset of records is included in your export.

## How to Export Data



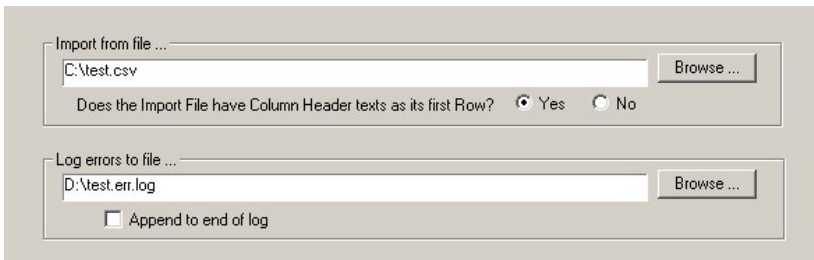
1. Create a Format Transfer Name. (Or select a previously saved format from the dropdown menu.)



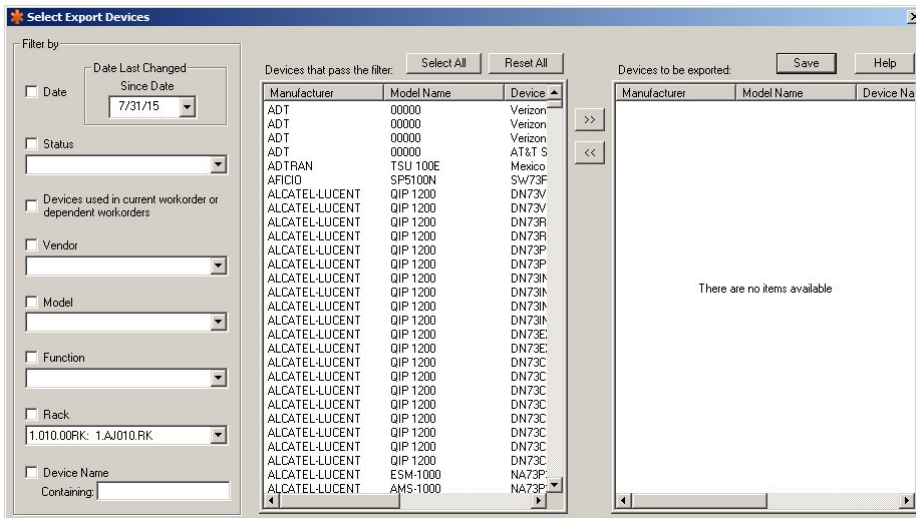
2. Select the data fields to include in the export. *Data Field selections will change depending on the asset type selected: device, cable or rack.*



3. Select the file names of the text file and error/audit trail log to use for the export.



4. Select the data to be exported. (The specific devices, cables or racks depending on where the transfer request was initiated.)



Filter the data to include only those assets that satisfy your criteria. Filter selections will change depending on the asset type selected: device, cable or rack. Assets are moved from the 'passed the filter' list to the assets 'to be exported' list. Multiple filters can be run to achieve the required list of assets to be exported.

- 5. Click the **Export** button.