iDashboards Data Integrator (iDI)
Frequently Asked Questions

General

What are the system requirements for hosting iDI?
Systems intending to host iDI must meet the following hardware requirements:

Minimum System Requirements
- Windows Vista SP2 or later
- .NET Framework 4.5 and its requirements
- 2 GHz 32-bit (x86) or 64-bit (x64) processor
- 1 GB of system memory
- 20 MB available hard drive space
- 32 MB of graphics memory
- Internet access

Recommended System Requirements
- Windows 7 x64 or Windows 8 x64
- NET Framework 4.5 and its requirements
- 2.8 GHz 64-bit (x64) processor
- 4 GB of system memory
- 1 GB available hard drive space
- 512 MB of graphics memory
- Internet access

What does iDI need to interact with my databases?
iDI relies upon the data drivers installed on your system. Some, like those that connect to MS SQL and MS Access, are probably already on your system. Others for MySQL or Oracle, may have to be installed from the free driver packages offered by the individual vendors.

Can I merge spreadsheets, text files and database tables?
Yes. Once imported into iDI, all data is viewed and manipulated in the same way, and can be joined into a single output.

Is there a way to handle duplicates in iDI?
iDI has very powerful options for handling duplicate records. Using the Find Dup Records or DeDup Records nodes, you can specify a column or group of columns to scan for duplicate values. Once found, the records can be selectively removed based on rules you define or set aside for further manipulation.

How many jobs can be open or running at the same time?
There is no limit to the number of jobs that can be open or running at the same time.

Can iDI's processes be automated or scheduled?
Yes. While viewing the job from the main toolbar menu, select Schedule > Job. Alternatively, while in the Jobs pane of the Workspace view, right-click on any job and select Schedule.

How much programming experience is required to use iDI?
Although there are powerful options in iDI for those with programming experience, no experience is required to create and run jobs due to the highly intuitive graphical interface.

Does iDI output formatted reports?
Yes. A number of options are available for outputting or exporting data to a formatted HTML file, MHT file, PDF, Word Document, a new Excel workbook, or even adding new data to a pre-formatted Excel file.

On average, how long does it take to make an iDI job?
The amount of time it takes to build a job varies with the complexity of the task at hand, but an average job takes only ten to fifteen minutes to configure.

Managing Data Connections

How do I tell iDI where to find my data?
First, create a data connection to the data folder or database
Right-click Data Connections and select New Connection
Enter a unique connection name
Select a data source type
Enter the requested information for the selected data source type
Save the connection settings
Then select specific database tables or data files by right-clicking the connection and clicking the Select Tables menu option
Right-click the Data Connection and choose Select Tables
Highlight and select files, worksheets and tables from selected connection location
For Text file data connections, define the file properties (if not automatically determined) and save.
Save the selected tables' settings

Why can't I select the data files I see?
When initially creating a data connection, selecting individual files isn't possible. Connecting to specific data files in your connection's folder is done by right-clicking on the connection and choosing Select Tables.

Why can't I see the data files I know are there?
The Select Tables screen will only show and select files that match the given Data Connection type (Excel, Text, Access, etc).

Why can't I see the Excel files I know are there?
There are three types of Excel files (XLS, XLSX, XLSB). The data connection type must match the file type exactly for the files to display in the Select Tables menu.

Why can't I see the Access files I know are there?
There are two types of Access files (MDB, ACCDB). The data connection type must match the file type exactly for the files to display in the Select Tables menu.

Why can't I save the text files that I've selected in my connection window as data sources?
Text files must have their properties defined before they can be used as sources of data in iDI. To define the properties click the Properties button beside the file to be used. Then, you will be able to Save and proceed to work with the tables you've chosen.

How do I add a data connection to a job?
Right-click the Job's Connections section and choose the Select Existing menu item. An alphabetical list of existing data connections and their associated files/tables will be displayed, from which the desired connections can be chosen.

Can I delete a table or data connection?
Yes. Right-click on the file, table or data connection and select Delete or Remove. Note: this WILL NOT delete the data itself, though it will disable jobs that use the deleted connection or table.

Creating and Sharing Jobs

How do I start a new job?
Right-click on the Jobs icon or a folder in the Jobs pane of the Workspace and select New Job. Alternatively, in the main toolbar menu, select Job > New Job. A tab labeled New Job will open.

How do I save a job?
In the top right of the Job view, click the blue disk to save, or click the green checkmark to save and close the job. Alternatively, in the main toolbar menu, select Job > Save or Save As.

How do I rename a job?
In the Jobs pane of the Workspace, right-click on a Job icon and select Rename. Alternatively, with the job open, you can save a renamed copy by selecting Job > Save As from the main toolbar menu.

How do I copy a job?
In the Jobs pane of the Workspace, right-click on a Job icon and select Copy Job. Alternatively, with the job open, you can save a renamed copy by selecting Job > Save As in the main toolbar menu.

How do I share a job with others?
Jobs can be exported from iDI as .vjf files to be imported by other users. In the Jobs pane of the Workspace right-click on a Job icon and select Export. Alternatively, while viewing a job select Job > Export from the main toolbar menu. A prompt will ask you where you would like to save the file.

How do I import a job that has been shared with me?
In the Jobs pane of the Workspace, right-click on the Job icon and select Import Job. Alternatively, select Job > Import Job from the main toolbar menu. A prompt will ask you where to find the .vjf file to be imported.

Why is my imported job not working?
Imported jobs often need to be reconnected to a data source in the new environment. You may either create new data connections and select files or tables with names that match those in the job, or remove the connection icons from the job and replace them with your own existing inputs.

Any outputs included in the job may also be pointing to locations that pertained to the previous machine. In this case, you will need to choose output locations to which you have access.

Organizing Jobs

How do I create a job folder?
In the Jobs pane of the Workspace view, right-click on Jobs and select New Folder.

Can I create a folder within a folder?
Yes. Right-click on the existing folder and select New Folder.

How do I place jobs in a folder?
Using the mouse, click and drag the job onto the destination folder.

How do I save a job into a specific folder?
The specific folder will be selected during the normal job save process, within the textbox labeled Path. If you are not saving a given job for the first time, you can still select a folder by using the Save As feature instead.

Can I move one folder into another folder?
Yes. Using the mouse, click and drag the folder onto the destination folder.

Building Jobs

How do I add nodes to a job?
With the mouse, click and drag the desired node from the Tasks list in the left pane of the job window into the job.

How many nodes can I add to a job?
There is no limit to the number of nodes a user can add to a job.

How do I connect nodes together?
On the Jobs toolbar, click the Node Connect Mode button (two red squares with a connecting line). Click first on a node providing input data, and then again on the node that will receive that data. Repeat this process with any nodes you would like to connect. When finished, click the Node Connect Mode button again.

Alternatively, hold the Alt key and press the left mouse button down on a node providing data, dragging and releasing over the node to receive that data.

How do I delete a connection between nodes?
Right-click on the line connecting the nodes and select Delete, OR left click on the line, and in the main Job Toolbar (not the general software toolbar) select Delete Selected Items (red x), OR left-click on the line and from the general software toolbar select Edit > Delete.

How do I relocate a node?
Click and drag the node to its new location. Node connections will snap to the new location.

How do I relocate several nodes at once?
With the mouse in a blank area of the Job Workspace, click and drag a selection rectangle around the desired nodes. Release the mouse and use the keyboard arrow keys to nudge the group of nodes around the workspace.

How do I copy an existing node?
Ctrl+ click on the node you wish to copy and drag the copy to its desired location. Connections to source nodes will be replicated, but connections to nodes which come after the copied node will not. You may also right-click, and Copy then Paste, or use the Edit > Copy or Paste feature in the toolbar, after choosing the node.

Can I copy several nodes at once?
Yes. Select the nodes you wish to copy by clicking and dragging over the selection, then right-click on any of the highlighted nodes, and select Copy. Alternately, you may copy the highlighted nodes by going to the toolbar, and choosing Edit > Copy. These nodes may then be duplicated by either right-clicking in a job pane and choosing Paste, or using the toolbar: Edit > Paste.

Why can't my output create a database table?
This is turned off by default, but may be activated. To activate, from the main menu select Tools > Options. In the General tab, check the box labeled Allow Create Table in Database and click Save.

How do I attach a note to a node?
Right-click on the node and select Edit Notes, OR in the jobs toolbar click the Edit Notes button while the node is selected, OR from the main menu select Job > Edit Notes.

Can I attach a note to the whole job?
Yes. With NO node selected, select Edit Notes from the main toolbar, or Job > Edit Notes from the main menu.

How do I delete a note?
Follow the steps to add a note to a node or job, and simply delete the contents of the note. When you save the change, the note should disappear.

Running Jobs

How do I run a job?
While viewing a job, click the green arrow in the Job Toolbar. Alternatively, in the Jobs Pane of the Workspace view, right-click on a job and select Run.

How do I run just one part of a job?
Right-click on a specific output node and select Run This Output Only.

How do I view the data coming out of a specific node?
Right-click on the node, even if it is not an output style node, and select Preview Data.

How do I schedule a job to run automatically?
While viewing the job, from the main menu select Schedule > Job. Alternatively, while in the Jobs pane of the Workspace view, right-click on a job and select Schedule.

Must iDI be open for a scheduled job to run?
Yes. It is possible to run jobs from command prompt. Please see the iDashboards Data Integrator User Manual for more information.

Can iDI notify me when a scheduled job runs?
Yes. Reports can be configured to email themselves automatically when created. To enable this feature, select Tools > Options from the main menu. In the SMTP Information tab, enter your local email service settings, and in the Distribution Lists tab enter email recipients.

Miscellaneous

How do I update my program?
In the main toolbar menu, select Help > Updates.

Where can I find my error log files?
From the main menu select Help > Log Files. Logs may be viewed and emailed to iDashboards Support from this window.

Where did my Workspace tab go?
The Workspace tab may have been accidentally closed. From the main menu, select Window > Workspace to reopen the tab.

My input files have lots of troublesome formatting characters that prevent my connections from being read properly. What can I do?
To remove erroneous or otherwise troublesome commas, carriage returns, double quotes, etc., select Tools > File Manipulation from the main toolbar menu. This menu offers many options for cleaning files even before they are read into an iDI job.