fSeries Export / Import

If you operate with separate fSeries development and live servers or you wish to distribute your fSeries setup to other servers, the Export / Import facilities make this possible.

fSeries lets you export and import the following:

- Entities
    - fData DSDs
    - fPanels dashboards
    - fDocs templates
    - fSheets templates
    - Menus
    - Processes
    - APIs
- Features Files (map data)
- Theme (colours and style)

Exports take the form of zip files which may be copied, moved and uploaded into another system.

Alias

A quick word on aliases for entities and other items.

The use of Aliases is very important when exporting entities and features files. Internally these items are identified by a unique, automatically allocated number and importing an item will create a new record with a new unique id. With an alias the import process can match the exported item to one in the receiving system in order to replace it.

Take another example of exporting an fPanels dashboard that has a primary DSD. The export process will make a note of the DSD required for the dashboard. Without an alias being applied to the DSD, the import process will not be able to match up an existing DSD to support the imported dashboard.

Aliases are never mandatory, but without them the export / import process becomes less controlled.

Entity Exports

All entities have an Export option in their "More Options" navigation bar menu.

Export type

There are three options for exporting an entity:

- Selected Entity – only the entity itself will be exported, along with references to any other items required by the entity (e.g. DSDs)
- Deep Export – the entity will be exported along with all entities that support it. For a menu this would be all entities in the menu as well as all entities required by all entities in the menu!
- Supporting Only – same as the Deep Export but the selected entity itself is not exported. Useful for exporting the contents of a menu but not the menu itself, allowing you to create a set of entities to be exported together.

Package

This option is only available if the account has a Unique Id (set by fSeries Support).

When one or more entities are exported you can indicate that the export is part of a package and give it a version number.

The purpose of this is to be able to construct packages that can be exported and maintained from your account. When an entity is imported the export's package and version are recorded together with the exporting account's unique id. When the entity is imported again, if the entity's design has not been changed since the last import the entity is considered to still be connected to the exporting account. If the version is the same as before, no action is taken; if the version has changed (up or down) the entity design is replaced with the newly imported version and the version number is updated.

If the importing / receiving account never changes an entity's design, the exporting account remains in control of the importing account's entities. In this way, the exporting account can maintain the entities in the receiving account.

Export packages must be created from the fAdmin option before they can be selected in the export process. Give an export package a Package id, Name and optional Notes. When creating an export file you will be able to select one of your export packages; the notes and the last version number exported will be shown for information. You can then enter a version number for the export.

Check the Export

It is recommended that you click "Check" to check the export contents.

The results are shown in four tabs to the right of the page (tabs will only be shown if relevant).

- Entities - The list shows all of the entities referenced by the selected entity. For Deep Export and Supporting Only it will also show all entities indirectly referenced as well.
- Sources – All data sources required on import. These cannot be exported for security reasons but the references will be exported and must be matched up on import
- Features Files – These can be exported separately – see below
- Custom Gatherers – Any customer data gatherers that are required. These must be installed before importing as they may be required to build data group schema.

A key piece of information in each list is the Alias, highlighting those with no alias. You can click on an item in the list to go to its properties page (in another browser tab) to edit the item, giving it an alias if not currently set. When done, return to the export page and click "Check" again.

Start

When you are happy with the export, click "Start". This may take some time depending on the number of entities exported. A zip file will be downloaded. Save this as your export file.

Export Account

From the fAdmin home page, the Export Account option is similar to the individual entity export but it includes ALL entities in your account.

This may take some time to download but provides a comprehensive backup of your account.

Entity Import

Entities are imported from the fAdmin home page "Entity Imports" option.

Click on the "Upload Import" button in the navigation bar and upload an entity export zip file. The new import will be added to the top of the list of imports. Click to open it.

In this example an fPanels dashboard has been deep exported. It requires the dashboard and a DSD (which are present from a previous version of the export package) and an associated colour gradient (that could not be exported as it was a globally available item). In addition a source is required; these are not exported for security reasons. Finally an fMaps features file is required; these can be exported separately and so is referenced here but not included in the file.

The list to the right is a legend indicating all of the statuses of items required by the import. Some require actions, some may be actioned if required and some are for information. Click on any item in the tags on the left to open the action form.

The actions available will differ depending on the item selected. The full set of options is:

- Retain a previously imported item in the same package and version
- New version:
  - Update a previously imported item in the same package but different version (if entity included)
  - Use the existing reference (if only referenced in the export)
- Ignore this item - do not import
- Use the matched item (when an item was found by matching aliases)
- Find an item to use (a search form will be opened for you to locate an existing item of the appropriate type to use as this item)
- Make a new item (use the imported version)
- Replace the current item (with the imported item)

For example, for entities that were not mapped you can ignore it completely, find an existing entity to be used as the one required, or make a new item.

You can save your chosen actions as you work, even returning later to complete the mapping (possibly after adding items such as sources which cannot be imported).

Once you are happy with your import mappings click "Import" on the navigation bar.

If any errors occur during the import process, no actions are completed and an Errors tab is displayed showing the errors that occurred.

Imports may be retained for information but once completed they may not be executed again.

Features Files

A features file contains a set of map features (points or areas) and properties of each feature. These are managed manually and so it is good practise to export them as a backup even if you are not importing into other systems.

Open a features file and click "Export" in its navigation bar. A zip file containing the features file export will be downloaded.

To import a features file, go to the list of features files and click Import from the navigation bar. Select the zip file and click to import.

Theme

From the fAdmin home page open the Theme option. This is the complete setup of colours and styles for your account.

Even if you are not wishing to import to another system it is worth exporting a theme as a backup.

Click "Export" from the navigation bar. A zip file will be downloaded.

To import a theme, click "Import" from the navigation bar, select the export zip file and click to import. Your theme will be reset to the imported settings.