Quick Start Guide on
How to Import Records from
Word Document

Document Version History		
Release	**Date**	**Comments**
Version 1.0 (Initial Release)	MM-DD-YYYY	

Table of Contents

1   About Word Import

Word Import is an add-in feature of ABC application, which facilitates data migration from Microsoft Word document to ABC application. The objective of Word Import is to parse data from a document, and add then in ABC application as entity items. By virtue of this add-in feature, you can parse – text, numbers, hyperlinks, and images, as different attributes (Title, Description, and other Field values) of entity items.

1.1   Benefits of Word Import

- **No need to access ABC application interface**. Instead, from a Word document you can directly access the add-in environment. Communication between Word document and ABC application establishes via Web Service. As soon as you trigger the import procedure the parsed data (in a structured format) gets added in ABC application.

- **Multiple options to set Parsing Logic**. The logic can be defined in three possible ways, using – Keyword, Delimiters, or Style. You have full control to specify the Keyword, and Delimiters by data (textual or numerical data) used in the document. Styles (MS Word) that you have used in the document to format the contents are available to set parsing logic. So, you can select any style(s) that seems logical to parse data as – Title or Description.

- **Greater flexibility to parse right data as entity items**. It starts right from the beginning, when you access Word Import add-in environment. The add-in feature of ABC Word Import allows you to:
  - ➢ Choose Workspace, and its Entity, where data will get added from word document, and at any point of time (before import) you are free to change Workspace and its Entity.
  - ➢ Define the Parsing Logic – 'what to parse', and 'how to parse' as per your business need. The parsing logic determines what data are to be added as – Title, Description, and Field value of items.
  - ➢ Specify whether to maintain hierarchy or not for parsed data. Maintaining the hierarchy is applicable if some texts/paragraphs/sections are indented (Increase Indent) in the document for practical use. The indented data get added in ABC application as sub-item, or child-item, and thereby maintains a hierarchy.
  - ➢ Specify default value of mandatory and non-mandatory fields. You can select what fields are to be considered from the list of all fields of the entity, and value to be set as 'default'.
  - ➢ Preview the structure of parsed data, and have fair idea on how they get added in ABC application after triggering the import procedure.
  - ➢ Modify the parsed data and make final rectification before they replicate in ABC application.

- **Cost Effective**. Often, for the sake of business need, data are documented in Word. To copy them in ABC application using a standard Form (Add Form of ABC application) is somewhat repetitive job, that costs – time, human effort, and risk of making mistake. In contrast, the add-in feature offers smart approach to replicate data from Word document to ABC application, and ensures optimized utilization of business time, and human effort.

1.2   Preconditions

- Need to install Microsoft Office 2003 or 2007

- The document should be pre-formatted, and created outside the scope of ABC application with defined Styles, and rich text as descriptions. You can use Style – Heading 1, Heading 2, or Normal to format the text to be parsed as 'Title'. Paragraphs (including textual data, images, and hyperlink), followed by each Title can be considered as 'Description'.

- If there is any sub/child item, the textual section (title and description) need to be indented properly (Increase Indent) in the document. ABC Word Import has an option to maintain hierarchy of data as they are indented in the document, and accordingly the data gets replicated in application. Indented block of data (text formatted as Title, and its Description) gets added in ABC application as child record or sub-item.

1.3   Organize data in Word Document

Import of data from Word document to ABC application depends on:

- How data are organized in document
- What are the Parsing Logic used for import

You can parse data in two ways – using the Wizard or functional Menu Options. The Wizard guides you to perform all sequential steps for importing entity items from Word document. The other approach (using functional Menu Option) is a manual procedure, where you have to select – *what data to parse out of the whole document* (i.e., scope), and *what data to mark as – Title, Description, and Field Value*.

Data (say, Functional Requirements) organized in Word Document

2   Getting Started

To view ABC – Word Import menu items:

- Click the 'ABC' menu option (tab) located on document toolbar. Application displays a set of menu-items for importing data from the document.

ABC – Word Import Menu

You can import data in two ways:

- **Using ABC's in-built Wizard**. The wizard guides you through sequential steps to accomplish the import procedure. See details: Import data using Wizard.
- **Using the Menu Options**. The options helps you to organize the document with different tags, which signifies – Start Entity, End Entity, Title, Description, Fields. Also there are some other menu options to – Unmark, Reset, Parse and Change of Entity/Workspace. See details: Import data using Menu Options.

3   Import data using Wizard

To start Word Import Wizard:

1. Click the '**Start Wizard**' option. Application displays a dialog box for login.

Word Import – Start Wizard

2. Enter following details:
    - **Web Service URL:** Select appropriate web service URL from the drop-down. If the drop-down displays no service URL, you can type the valid URL (like 'http://eval6.ABC.com/word')
    - **User Name:** Enter valid user name. It should be the login ID that you use for accessing ABC application.
    - **Password:** Enter valid password. It should be the password of ABC application.
3. Click the **Login** button. On successful login, application displays another section '**Workspace**' to select a particular workspace for which you want to import data.
4. Select the **Workspace** (say, ABC Req Training) from the list.
5. Click the **Done** button.

3.1   Wizard Step 1: Select Project And Entity

To select Workspace and Entity:

1. Enter following details:

    - **Select Workspace:** Workspace that you have already selected during Login procedure, is displayed in the list as selected. You can also change the workspace (if required).

    - **Select Entity:** The drop-down list displays all entities of the selected Workspace. Select an Entity (say, Requirements) for which you want to import data from the word document.

2. Click the **Next >>** button.
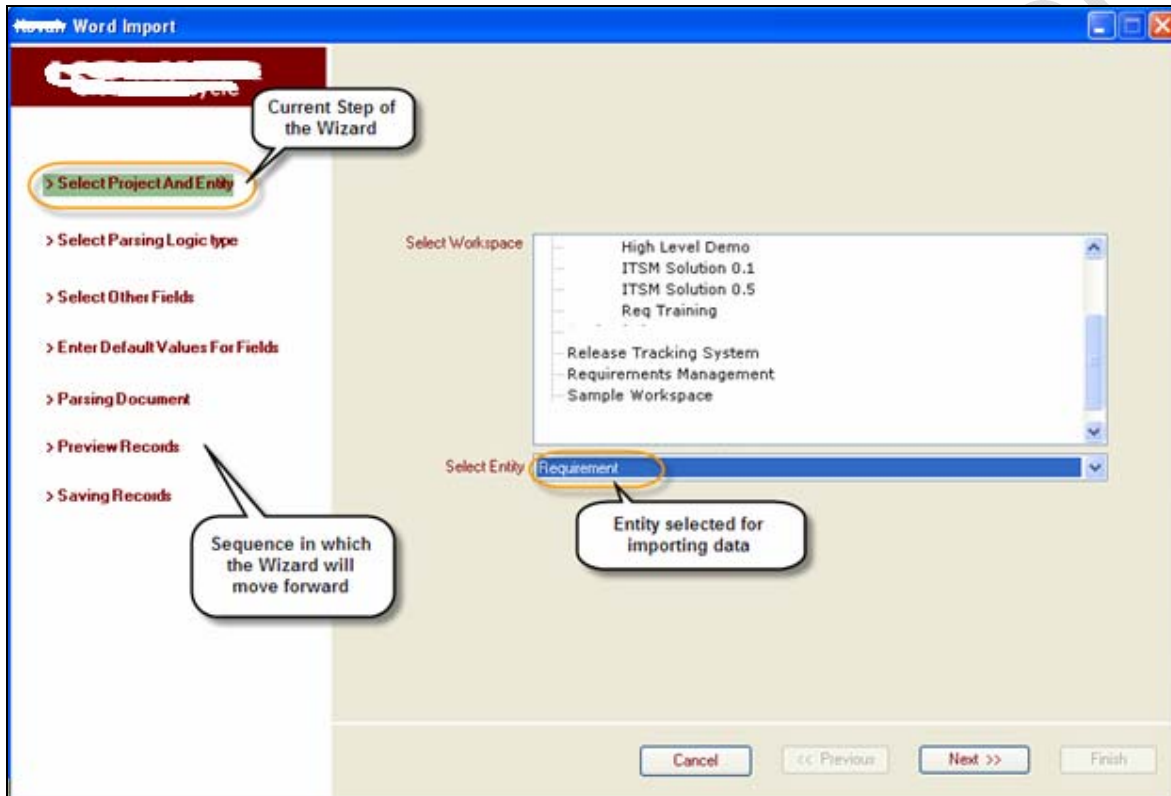
Workspace Selection after Login

3.2   Wizard Step 2: Select Parsing Logic Type

To select parsing logic:

1. Set parsing logic for importing data from Word Document. Parsing logic is determined by criteria you set for three sections – **Parse for**, **Parse using**, and **Selected Parsing Logic**:

    *   **Parse for** – Select an option ('**Title**' or '**Description**') for which you want to parse data.

        ➢ Select the option '**Title**', and set criteria to retrieve Description. See more: Parse for Title

        OR

        ➢ Select the option '**Description**', and set criteria to retrieve Title. See more: Parse for Description

    *   **Parse using** – Select an option ('**Keyword**', '**Delimiter**' or '**Style**') to use for parsing data.

        ➢ Select the option '**Keyword**' and type a logical word that has been used frequently in the word document. Use of keyword can be simple or advanced (Match Case or Wildcard). See more: Parse data using Keyword

        OR

        ➢ Select the option '**Delimiter**', and type logical words as Begin Delimiter, and End Delimiter. See detail: Parse data using Delimiter

        OR

        ➢ Select the option '**Style**', and check the Style(s) from the list styles used in the document. See detail: Parse data using Style

2. Click the **Add Parsing Logic** button. The parsing logic gets added in the list of **Selected Parsing Logic**. Follow the same procedure to add more parsing logic. Application allows you to organize the parsing logic you have added in the list.

> Check the option '**Maintain Hierarchy**' to import data maintaining parent-child hierarchy. Please ensure that block of data (Title and Description) representing sub-item or child record should be pre-formatted (indented) in the document, before you parse them to import.

3. Click the **Next >>** button.

Parsing Logic Type

3.2.1 Different options to set Parsing Logic

Select Parsing Logic Type page shows multiple options under two major sections – **Parse for**, and **Parse using**.

The section **Parse for** allows you to define the object (Title or Description) you want to parse.

See more: Parse for Title, and Parse for Description.

Another section **Parse using** helps you to set parsing criteria that applies on object selected to Parse for (Title or Description). Keyword, Delimiter, and Style – are three options available to use for parsing. You can select any one option among them, and accordingly, set the parsing logic.

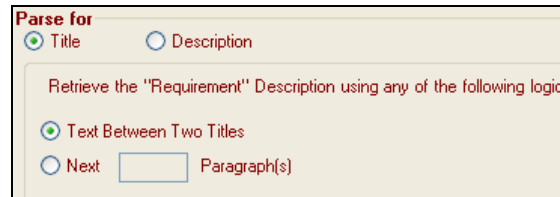| Parse for	Parse using	Explanation
Title	Keyword	Parse the texts (as Title) from word document using a Keyword. See more: Parse data using Keyword.
	Delimiter	Parse the texts (as Title) from word document using Begin Delimiter and End Delimiter. See more: Parse data using Delimiter.
	Style	Application parse the texts (as Title) from word document using Styles. See more: Parse data using Style.
Description	Keyword	Parse the texts (as Description) from word document using a Keyword. See more: Parse data using Keyword.
	Delimiter	Parse the texts (as Description) from word document using Begin Delimiter and End Delimiter. See more: Parse data using Delimiter.
	Style	Parse the texts (as Description) from word document using Styles. See more: Parse data using Style.

3.2.2 Parse for Title

Parse for: Select the option '**Title**', and set criteria to retrieve **Description**. You can retrieve the Description using either of the following logic:

- Text Between Two Titles
- Next [number of] Paragraph(s)

3.2.2.1 Retrieve Description: Text between two Titles

Text Between Two Titles: Select this option to retrieve **all texts between two consecutive Titles as Description of the first Title**.
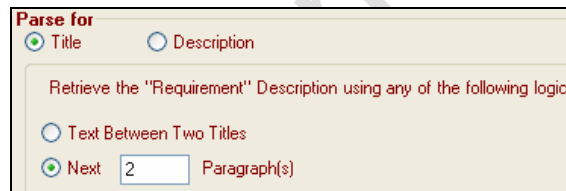

Retrieve text between two Titles as Description

3.2.2.2 Retrieve Description: Next [number of] Paragraph(s)

Next [ ] Paragraph(s): Select this option to retrieve **specific number of paragraphs followed by each Title as its Description**. Put some numerical value (say, 1, 2 or 3) in the text box. For example, if you enter numerical value '2', then first two paragraphs after each title will be retrieved as 'description'.

Retrieve paragraphs as Description

3.2.3   Parse for Description

Parse for: Select the option '**Description**', and set criteria to retrieve **Title**. You can retrieve the Title using any of the following logic:

- First [number of] characters
- First Line
- First Sentence
- Automatically generate Title using 'Base Name' and 'Sequential Number'

3.2.3.1 Retrieve Title: First [number of] characters

First [ ] number of characters: Select this option to retrieve **first few characters of the description as Title**. Put some numerical value (say, 25, 30, 50, or 100) in the text box. Ideally this number should not be more than '255', but if you put numerical value more than 255, then application will retrieve only the first 255 characters.

Retrieve first few characters as Title

3.2.3.2 Retrieve Title: First Line

First Line: Select this option to retrieve the **first line of Description as Title**.

Retrieve first line as Title

3.2.3.3 Retrieve Title: First Sentence

First Sentence: Select this option to retrieve **first sentence of Description as Title**.

Retrieve first sentence as Title

3.2.3.4 Retrieve Title: Automatically generate using Base Name and Sequential Number

Select this option to **generate the Titles automatically by the application using a Base Name and Sequential Number**. Each title will have a base name followed by sequential number. For example, REQ:001, REQ:002, REQ:003… where 'REQ:' is considered as 'base name'. Enter following details to set the base name, the number pattern, and the starting number of the sequence:

- **Enter a base name for each (item) Imported:** Type logical and self-expressing text as 'Base Name' so that other users can understand the items by viewing the Titles.

Entities	Suggested Base Names
Requirements	REQ
Use Cases	UC
Test Case	TC
Service Requests	SR
Change Requests	CR

- **Sequential number pattern:** Specify total number of digits in terms of any numerical value. If you want a 5-digit number pattern, enter five random numbers like – '12345', '33333' or '82845'. Similarly, for 3-digit number pattern it can be anything like – '846', '002', '200' or even '000'.

- **Sequence starts with:** Specify the number by which the sequence will start, not necessarily every time this number should be '1'. You can start from any numerical value as per real-life situation. Consider the scenario where you are importing 50 records at a time. So, for importing first 50 records, you can start the sequence from '1', and for next 50 records from '51'.

Generate Title with base name and sequential number

3.2.4   Parse data using Keyword

Parse using: Select the option '**Keyword**'. You can set four different criteria to parse using a Keyword.

- Type a **keyword** (say 'requirement') in the text field.
- Select the options – '**Match Case**' and/or '**Use * as Wildcard**' as per real-life purpose. Possible options are:
    - ➢ Simple Approach
    - ➢ Advanced Approach: Using Match Case
    - ➢ Advanced Approach: Using Wildcard

3.2.4.1 Simple Approach

If you **do not select any options**, then application will parse sentence (paragraph for description) having the exact word, irrespective variation in case (UPPER CASE / lower case). For example if the keyword is given as 'requirement', then application will consider words – 'Requirement', 'requirement', and 'REQUIREMENT', but it will NOT consider words with variation in alphabets like – 'Requirements', 'requirements' and 'REQUIREMENTS'.

Only Keyword (without Match Case or Wild Card)

3.2.4.2 Advanced Approach: Using Match Case

If you **select the option Match Case**, then application will parse sentence (paragraph for description) having the exact keyword (case sensitive). For example, if the keyword is given as 'requirement', then application will consider only those sentences having the exact word in proper case, like – requirement. Due to case sensitiveness, it will NOT consider the same words with variation in case (UPPER CASE / lower case), like – 'Requirement' or 'REQUIREMENT'.

Keyword with Match Case

3.2.4.3 Advanced Approach: Using Wildcard

If you **select the option Use * as Wildcard**, it automatically becomes '**Match Case**'. Then application will parse sentence (paragraph for description) having any word starting with given keyword. For example, if the keyword is '**req***', then application will consider words starting with 'req' in proper case, like – 'requirement', 'requirements',

'require', 'required'. Due to case sensitiveness, it will NOT consider words if there is variation in case (UPPER CASE / lower case) like – 'REQUIREMENT', 'Require'.

Keyword with Wild Card

> ➢ Click the **Add >>** button.

Parse Title using Keyword with Match Case

> **Selection Range:** This section becomes active when you parse for 'Description' where you may want to parse the sentence or whole paragraph that contains a given keyword.
>
> • **Paragraph** – Select this option if you want to parse the whole paragraph that contains a keyword.
>
> OR
>
> • **Sentence –** Select this option if you want to parse the sentence that contains a keyword.

3.2.5   Parse data using Delimiter

- **Parse using:** Select the option '**Delimiter**', and specify two different words to mark begin and end of a sentence or paragraph.
  - ➢ **Begin Delimiter:** Enter a word to use as beginning of a text (say, 'Function').
  - ➢ **End Delimiter:** Enter a word to use as end delimiter of a text (say, 'Requirement).

You should be very particular about selecting the words as delimiters (Begin Delimiter, and End Delimiter). Words you want to apply as delimiters, should present in the document, so that when you parse proper text as Title or Description. For example, consider a scenario, where you want to parse Titles that starts with the word 'Function' and ends with word 'records'. You have to set the word 'Function' as Begin Delimiter, and 'Requirement' as End Delimiter. Using such criteria you are then able to parse Titles like – 'Function user login to manage Requirement records', 'Function of event-driven Policies for records', 'Function to Process technical and marketing Requirement records'.

Select the option '**Delete When Imported**' to parse the text excluding the delimiters.

Scenario: Consider the words 'Function', and 'Requirement' are set as Begin Delimiter and End Delimiter. The option 'Delete When Imported' is checked.

If text in the document is: Function to process technical and marketing data Requirement

Application will parse: to process technical and marketing data

Parse Title using Delimiters

➢ Click the **Add** button.

Delimiters added (with Match Case)

3.2.6   Parse data using Style

Parse using: Select the option '**Style**'. The list displays all styles that you have used to format/organize contents in the Word Document.

• Check the **Style(s)** from list.

  If you are parsing data for 'Title' then texts formatted in selected style(s) will be parsed as titles. If you are parsing data for 'Description' then texts or paragraph formatted in selected style(s) will be parsed as descriptions.

Parse Data using Styles

3.3　　Wizard Step 3: Select Other Fields

To select other fields:

1. Check the fields (non-mandatory fields) for which you want to set 'Default Value' before parsing the document. The list displays all fields (system fields, and custom fields) of the Entity you have selected at the beginning, see: Wizard Step 1: Select Project And Entity.

> The mandatory fields are marked with '*' (asterisk), and they remain selected by default.

2. Click the **Next >>** button.

Other Fields

3.4   Wizard Step 4: Enter Default Values For Fields

To set default values for selected fields:

1. Specify default values for the selected fields.
2. Click the **Next >>** button. Application starts parsing data from the document.

Default values for Fields

3.5 Wizard Step 5: Parsing Document

Application displays a confirmation message when data are parsed successfully from the word document.

To parse document:

1. Click the **Next >>** button.
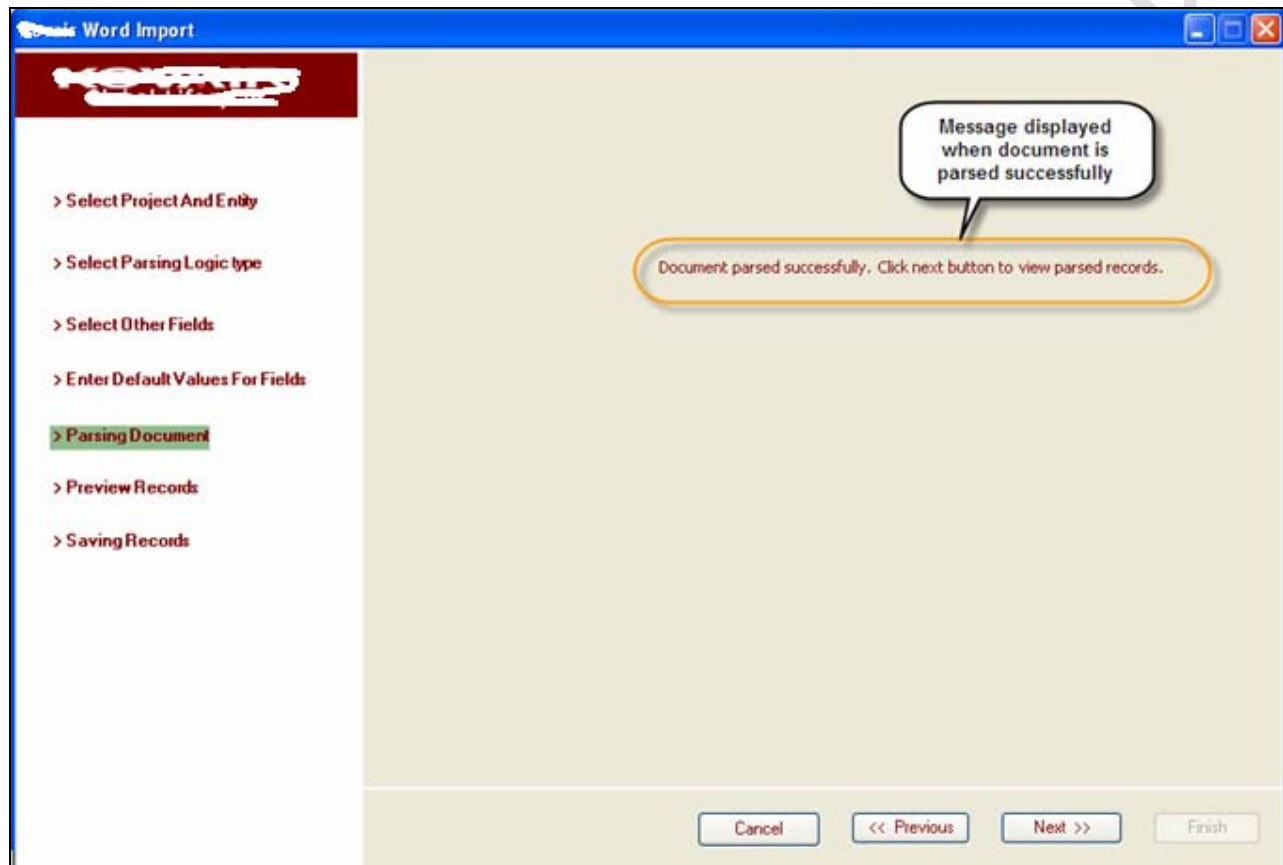
Message after parsing data

3.6 Wizard Step 6: Preview Records

Application displays the parsed data in a grid. Sections, which were indented in the document, are parsed with sub-level IDs (like – 2.1, 2.2, 2.3). Data parsed as 'Description' are not displayed in the grid, as other information are displayed for Title and Field values. Corresponding to each 'Title' a button Edit/View is provided to view the contents parsed as Description.
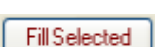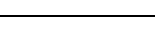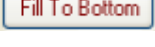
- Perform following actions before the parsed data get imported in ABC application:
  - ➢ Organize parsed data using the buttons displayed below the grid. See: Buttons to organize parsed data
  - ➢ Preview the contents to be imported as 'Description', and make necessary changes. See: Edit/View parsed Description
  - ➢ Verify the hierarchy of parsed data by IDs displayed in the grid. See: Verify hierarchy of parsed items
  - ➢ Change Field values displayed in the grid cells. See: Change data parsed as Field values

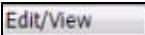- Click the **Next >>** button to trigger import procedure.
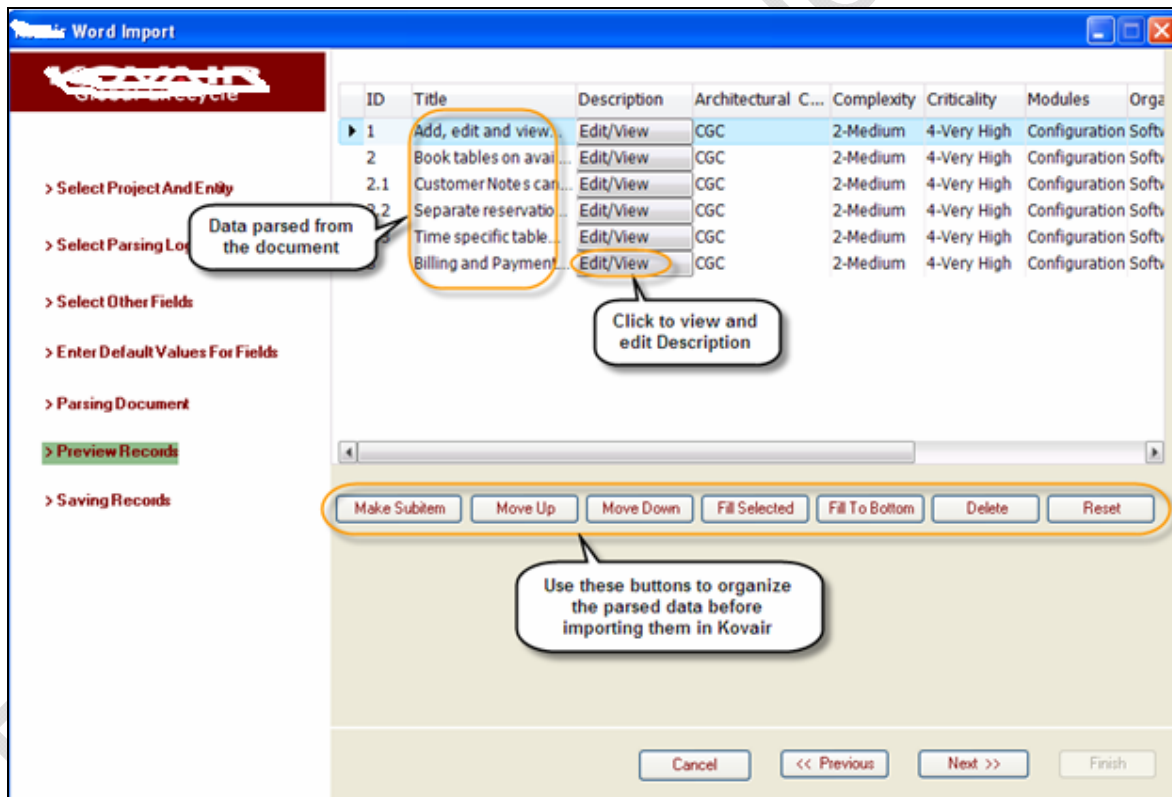
Preview the parsed data in a grid

3.6.1 Buttons to organize parsed data

In Wizard Step 6: Preview Records, the parsed items are displayed in a grid. Often you may want some modification in parsed data before they get imported in ABC application. To facilitate this, a set of buttons are available just below the grid section.
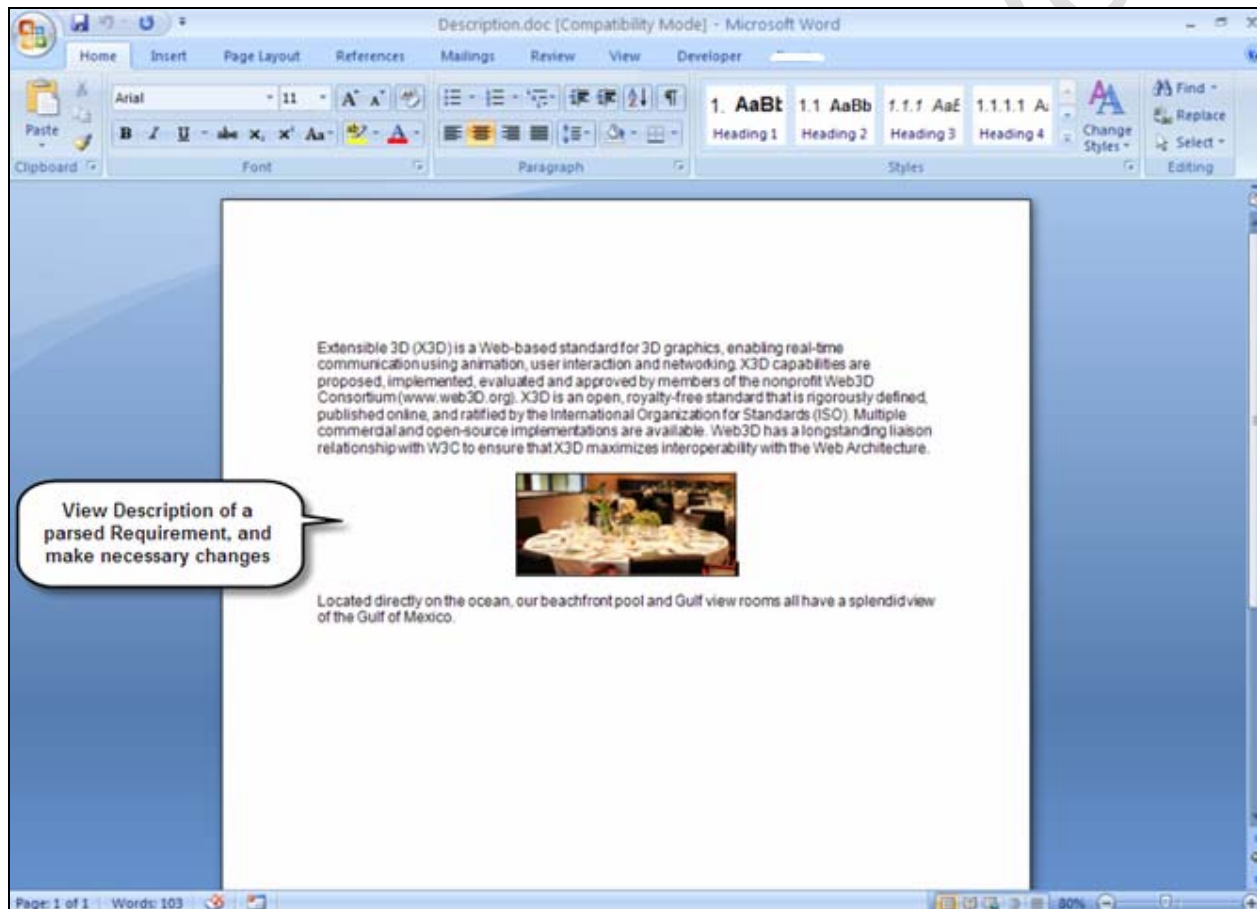
Buttons	Description
Make Subitem	**To set a parsed record as sub item (child) of its previous record.** Select a record from the grid, and click the button.
Move Up	**To move a record one step upward in the grid.** Select a record from the grid, and click the button.
Move Down	**To move a record one step downward in the grid.** Select a record from the grid, and click the button.
Fill Selected	**To update value of the cells.** Change value in a cell, and then select other cells (including the cell that you have modified) of the same Field. Click the button. System updates the selected cells with modified value.
Fill To Bottom	**To update cells with a value from a particular cell down the column (up to bottom).** Change value in a cell and click the button. System updates rest of the cells up to bottom, with modified value. Values, stored in the cells located above of the modified cell, remain unaffected.
Delete	**To delete any parsed item before import.** Select a row in the grid and click the button.
Reset	**To rest the changes done in grid cells.** Click the button to reset all changes you have done in the grid.

3.6.2   Edit/View parsed Description

The grid does not display the contents, which are parsed as 'Description'. Edit/View button is provided against each title to facilitate view and edit of parsed Description. The description is displayed in a document, where you can do necessary changes, and save the modified contents.
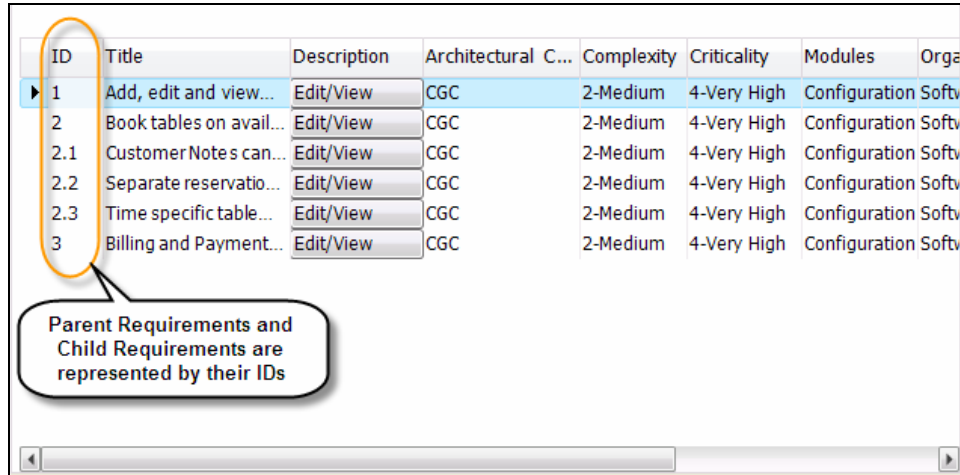
To view/edit contents parsed as Description:

1. Click the Edit/View button. The parsed description (textual information, images, hyperlinks) is displayed in a separate document (NOT the original document from where you parsed data).

2. Modify the contents, and save the changes in this Word document.

Contents parsed as Description

3.6.3   Verify hierarchy for parsed items

Often you may require to import data as parent-child items. To ensure this, the contents need to be indented in the document, and option 'Maintain Hierarchy' should be checked when defining the parsing logic. The indented contents are parsed as sub-item or child record. You can easily identify them by IDs as displayed in the grid (say, 2.1, 2.2, 2.3).

ID	Title	Description	Architectural C...	Complexity	Criticality	Modules	Orga
1	Add, edit and view...	Edit/View	CGC	2-Medium	4-Very High	Configuration	Softv
2	Book tables on avail...	Edit/View	CGC	2-Medium	4-Very High	Configuration	Softv
2.1	Customer Notes can...	Edit/View	CGC	2-Medium	4-Very High	Configuration	Softv
2.2	Separate reservatio...	Edit/View	CGC	2-Medium	4-Very High	Configuration	Softv
2.3	Time specific table...	Edit/View	CGC	2-Medium	4-Very High	Configuration	Softv
3	Billing and Payment...	Edit/View	CGC	2-Medium	4-Very High	Configuration	Softv

Parent Requirements and Child Requirements are represented by their IDs

Verifying hierarchy of parsed items

3.6.4   Change data parsed as Field values

Often you may need to change field values before they get imported in ABC application. In the grid you can view default values as set in Wizard Step 4: Enter Default Values For Fields. In general all field values may not be same for parsed items. So, you may need to change the 'default' values.

Use the buttons – **Fill Selected**, and **Fill To Bottom** to change the default values of multiple cells at a time. See: Buttons to organize pared data.

- Click a cell inside the grid, and modify the value.
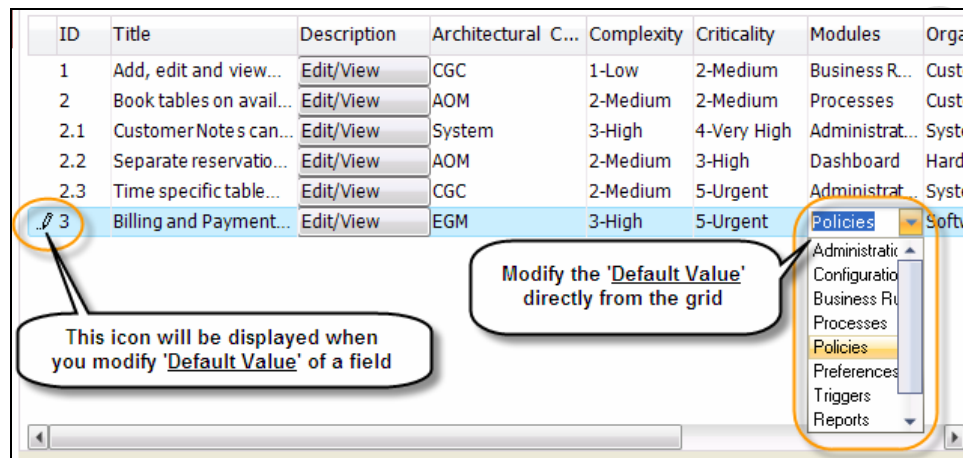
Updating fields for parsed Requirements

3.7   Wizard Step 7: Saving Records

Application starts inserting the items from word document to ABC application. Following message is displayed when all parsed data get added and saved in the application.

- Click the **Finish** button.
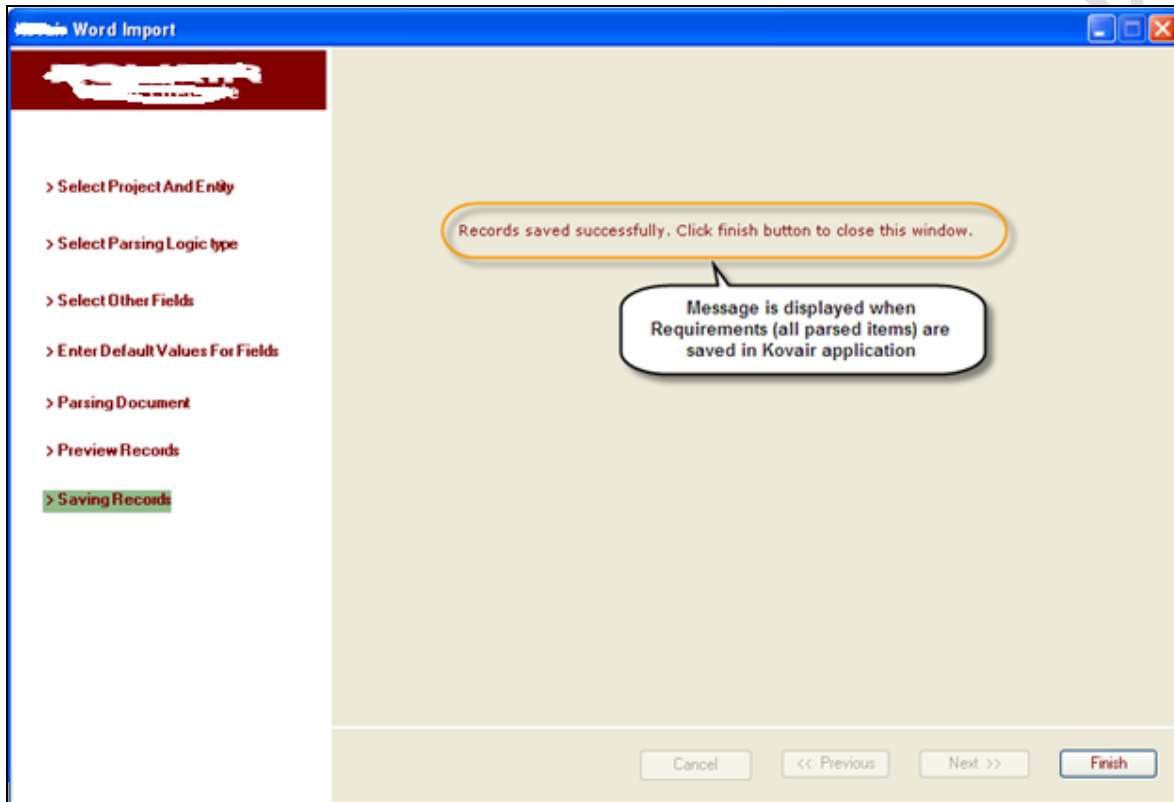
Message after saving the records

4   Post Import Verification

To verify imported items in ABC application:

1. Login to ABC application, and access end user mode (Home).

2. Click the <u>**List**</u> sub-menu link under the **Entity** (say, Requirement) for which you have imported the items from Word document. Application displays list of existing items of that Entity.
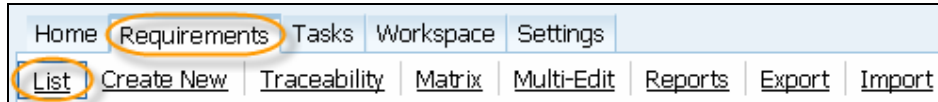
Navigation to an Entity List (say, Requirements List)

3. Use appropriate Filter or Search criteria to verify the imported items in the list.

Example: How to render the list with items you have imported
If the scenario is such that after you import a set of items, no more items have been added in ABC application by any means, then you can use **ID Search**. Type '*last 10*' or '*last 20*' as **ID Search** criteria, and click the ➡ icon. Application displays the latest items (including the items you imported from document) in the list.
If the scenario is such that after you import a set of items, more items have been added in ABC application by any other means, then you can use **Text Search**. Type appropriate word or phrase (you have parsed as 'Title' or 'Description') as **Text Search** criteria, and click the ➡ icon. Application displays the items which con(including the items you imported from document) in the list
If more items have been added (by other users using any other means) after the import procedure, then you can try Text Search or page navigation to track the items imported by you.

4. Identify the imported Requirements in the list, and also verify whether the Requirements are added with proper hierarchy.

Requirements imported in ABC

5. Click the [icon] (Action Menu) icon against a Requirement (say, ID: 234.1) for which you want to verify whether proper values are mapped during import procedure. Application displays Requirement details.

Requirement Details imported in ABC

5   Index