

# Data2Feed: Management Guide



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## Context and Application Management:

The Data2Feed application is designed to perform massive loading of source data to the containers of the MasterBase® platform.

It is a Windows application developed by MasterBase®.

Definition:

- Feed: Record or object that is inserted in a container.  
Container: A common depository containing one or more feeds on which the mechanisms/engines operate.
- ODBC (Open DataBase Connectivity): Standard of access to databases. The goal of ODBC is to make it possible to access any data source from any application with the *driver* for the corresponding connection.

Features of the Data2Feed application:

- Designed to provide access to a client feed and to extract and transmit it to a MasterBase® container where it is processed by an automaton that associates labels with a contact.
- Uses ODBC standard to ensure access to feeds.
- Has configuration files with editable parameters that allow you to define the container to be loaded and the credentials of that particular load.

## User Manual:

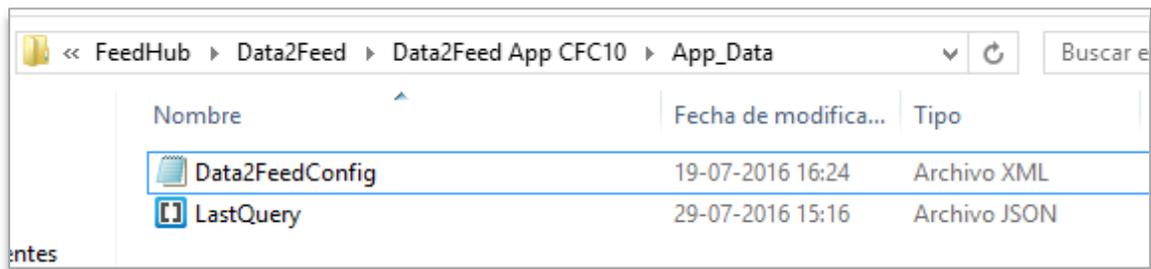
- Obtain a compressed application (Data2Feed.zip file)
- Decompress the file in the directory of choice (example C:\Data2Feed)

Before you start using the application, you need to:

1. Configure the Data2FeedConfig.xml file
2. Create the ODBC connection (s) required to access data sources.

### (1) File Configuration Data2FeedConfig.xml

The configuration file is called Data2FeedConfig.xml and is located in the path ... \Data2Feed \ App\_Data



Open the configuration file with a text editor (Brackets, Notepad ++, etc.)

This file contains the modifiable parameters, which correspond to:

- (1) the customer identifier (CustomerID),
- (2) the name of the container to load (ContainerID),
- (3) the key of said container (Key) and
- (4) the value of the JSONArrayLength parameter.

```

1 <Data2Feed>
2   <ServiceSettings>
3     <Motor>MasterBaseAutomata</Motor>
4     <Platform>Data2Feed</Platform>
5     <Instance>Data2Feed 01</Instance>
6     <ServiceId>11230</ServiceId>
7     <FeedHub>
8       <Uri>https://feedhub.masterbase.com/v1</Uri>
9       <CustomerId>4683</CustomerId>
10      <ContainerID>CFC10</ContainerID>
11      <Key>CAB45B06-11BC-49FE-A32B-C9714FAF399C</Key>
12    </FeedHub>
13    <SQLQuery>
14      <Parameter Name="Id">0</Parameter>
15      <JSONArrayLenght>50</JSONArrayLenght>
16    </SQLQuery>
17  </ServiceSettings>
18  <Instrumentation EndPoint="">
19    <LogInformation>>false</LogInformation>
20    <LogWarning>>true</LogWarning>
21    <LogError>>true</LogError>
22  </Instrumentation>
23 </Data2Feed>

```

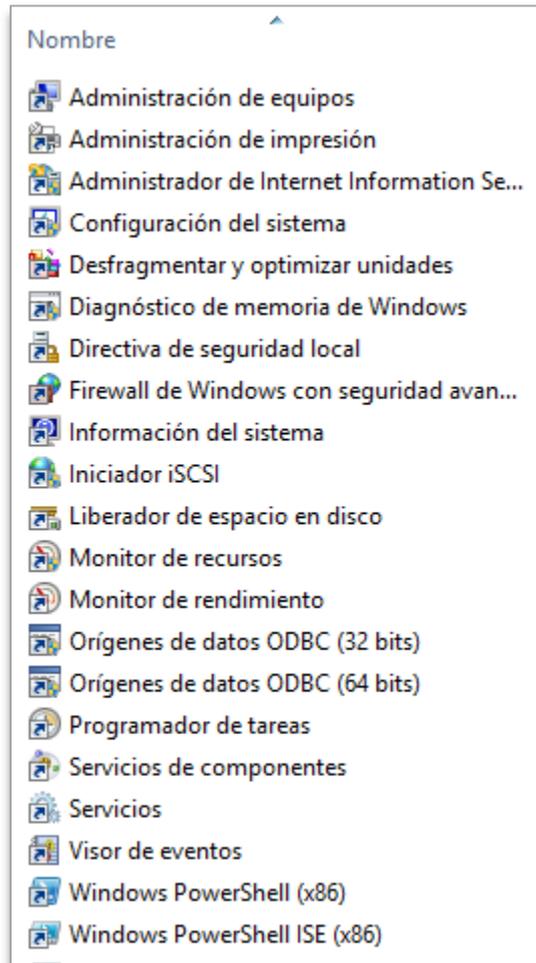
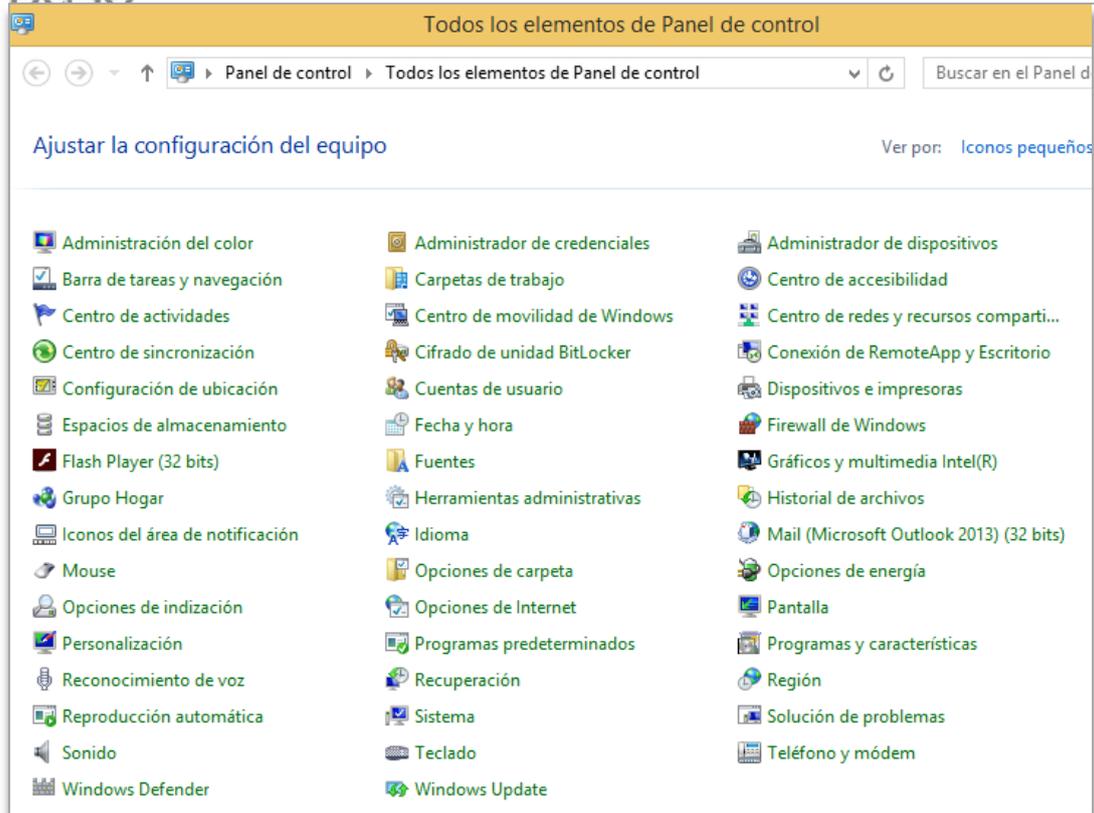
The first 3 parameters correspond to the data needed to access the desired container; the data associated with the container can be obtained directly from the platform.

CFC11	Cliente	CFC para Don Monchito	jmoreno@masterbase...	15/07/2016 15:21:59	Habilitado	Acciones
CFC05	Sistema	Contenedor de Sistema - Feeds de DESCRIPCIONES	jbenavente@corp.mast...	21/09/2015 15:25:07	Habilitado	Ver Estadística Ver Feeds
CFC04	Sistema	Contenedor de Sistema - Feeds de REBOTES	apesce@corp.masterba...	03/09/2015 12:40:22	Habilitado	Editar Copiar Key

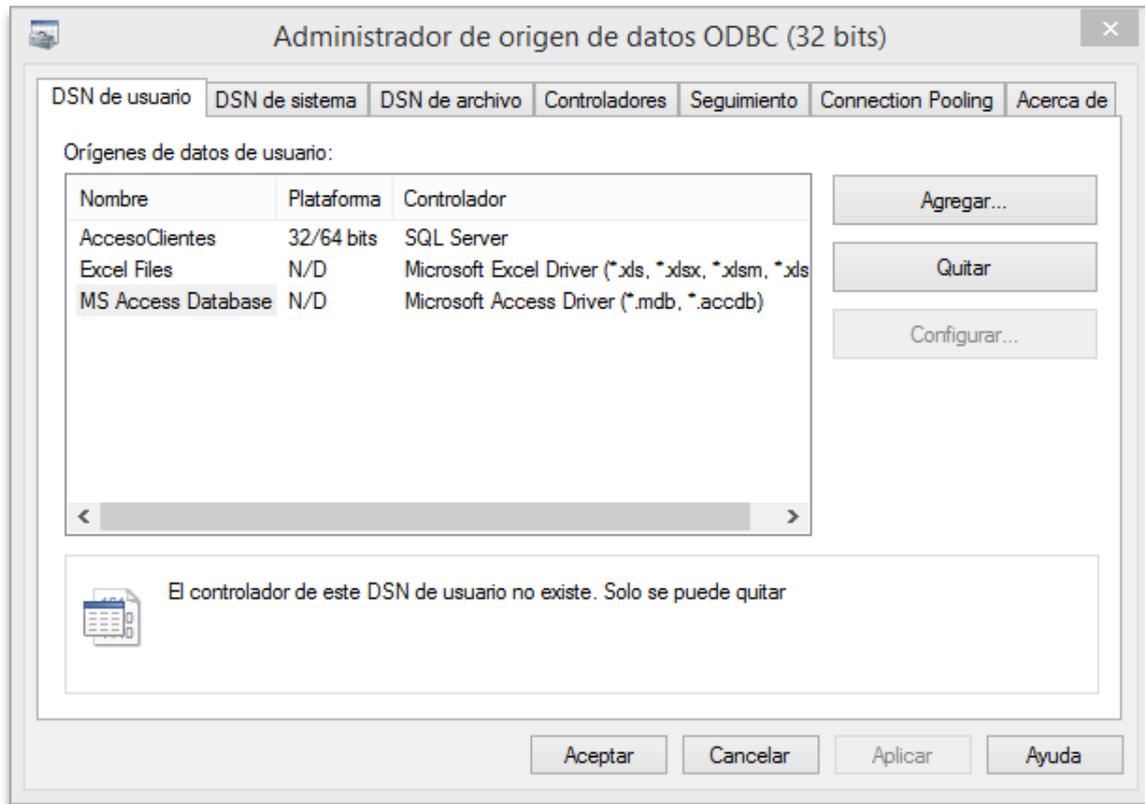
The value of the JSONArrayLenght parameter will depend on several factors: connection speed to upload files (load speed), amount of free RAM of the computer, size of the source of origin, size of each record of the source. By default, the last value, is defined as 50.

## (2) Creating ODBC connections

Open the Windows Control Panel and select Administrative Tools and then ODBC Data Sources (32bits)



Using this option, the following window will be displayed:



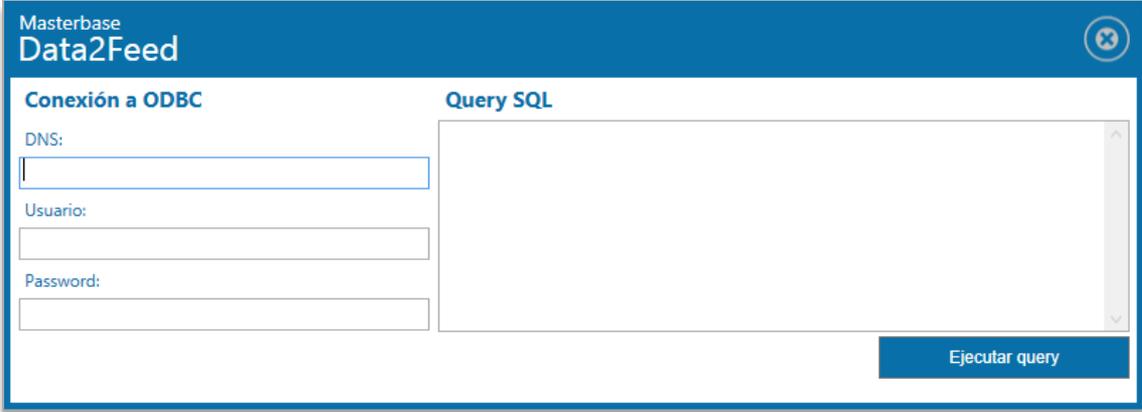
Click on the "Add ..." button to open a dialog box with the available drivers.

In this box, you must choose the driver "Microsoft Excel Driver (\*.xls)" and click on the "Finish" button. The following window asks for the feed's source name and the location of the respective Excel file.

Enter the name. For the "Excel Users" example, clicking the "Select Book" button will open a window where you have to select the file, in this case "users.xls", Click the "OK" button.

Once completed, click "OK" and the data depository will be ready.

Once the Data2Feed is configured, the application "Data2Feed.exe" is executed.



Completing the form:

- In the DNS field, write the source name of the feed, in this case "UsuariosExcel" (the name given when creating the feed's source).
- The user name and password are used when the feed's source document is restricted to an authorized user, as in the case of a SQL Server. In the example Excel is not protected, and these two fields are left blank.
- In the Search SQL section write the filters that you want to apply to the data for a search in SQL language. For example, if you want to list all users, the search will look like this:

```
Select *  
From [Usuarios$A1:F501]  
Where id > 0
```

As you can see, the From in the search is the name of the table and the range of the Excel sheet that you want to use. In this case: [Users \$ A1: F501], that is, in the Users page, with a range from cell A1 to cell F501. Note that the first row will contain the names of the fields, as the result shows:

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**Conexión a ODBC**

DNS:

Usuario:

Password:

**Query SQL**

```

Select *
From [Usuarios$A1:F501]
Where id > 0
                
```

Ejecutar query

id	Nombres	Apellidos	email	Fecha nacimiento
1	Nombre_1	Apellido_1	Nombre_1.Apellido_1@mail.com	10/08/2000 0:00:00
2	Nombre_2	Apellido_2	Nombre_2.Apellido_2@mail.com	19/05/1980 0:00:00
3	Nombre_3	Apellido_3	Nombre_3.Apellido_3@mail.com	22/08/1981 0:00:00
4	Nombre_4	Apellido_4	Nombre_4.Apellido_4@mail.com	07/05/1986 0:00:00
5	Nombre_5	Apellido_5	Nombre_5.Apellido_5@mail.com	22/04/1972 0:00:00
6	Nombre_6	Apellido_6	Nombre_6.Apellido_6@mail.com	15/07/1960 0:00:00
7	Nombre_7	Apellido_7	Nombre_7.Apellido_7@mail.com	18/09/1945 0:00:00
8	Nombre_8	Apellido_8	Nombre_8.Apellido_8@mail.com	12/02/1989 0:00:00
9	Nombre_9	Apellido_9	Nombre_9.Apellido_9@mail.com	10/12/1970 0:00:00
10	Nombre_10	Apellido_10	Nombre_10.Apellido_10@mail.com	12/03/1973 0:00:00
11	Nombre_11	Apellido_11	Nombre_11.Apellido_11@mail.com	11/06/1953 0:00:00
12	Nombre_12	Apellido_12	Nombre_12.Apellido_12@mail.com	31/12/1947 0:00:00
13	Nombre_13	Apellido_13	Nombre_13.Apellido_13@mail.com	12/05/2001 0:00:00

Exportar a Json

It is also possible to choose certain columns and add a filter or order. For example in this search:

```

Select [Date of birth], Names, Surnames, email
From [Users $ A1: F501]
Where [Date of birth]> {ts '1980-01-01 00:00:00'}
Order by [Date of birth]
    
```

With the following result:

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**Conexión a ODBC**

DNS:

Usuario:

Password:

**Query SQL**

```

Select [Fecha nacimiento], Nombres, Apellidos, email
From [Usuarios$A1:F501]
Where [Fecha nacimiento] > {ts '1980-01-01 00:00:00'}
Order by [Fecha nacimiento]
```

Fecha nacimiento	Nombres	Apellidos	email
07/05/1986 0:00:00	Nombre_30	Apellido_30	Nombre_30.Apellido_30@mail.com
12/02/1989 0:00:00	Nombre_34	Apellido_34	Nombre_34.Apellido_34@mail.com
12/02/1989 0:00:00	Nombre_21	Apellido_21	Nombre_21.Apellido_21@mail.com
12/02/1989 0:00:00	Nombre_47	Apellido_47	Nombre_47.Apellido_47@mail.com
12/02/1989 0:00:00	Nombre_8	Apellido_8	Nombre_8.Apellido_8@mail.com
10/08/2000 0:00:00	Nombre_14	Apellido_14	Nombre_14.Apellido_14@mail.com
10/08/2000 0:00:00	Nombre_1	Apellido_1	Nombre_1.Apellido_1@mail.com
10/08/2000 0:00:00	Nombre_27	Apellido_27	Nombre_27.Apellido_27@mail.com
10/08/2000 0:00:00	Nombre_40	Apellido_40	Nombre_40.Apellido_40@mail.com
12/05/2001 0:00:00	Nombre_13	Apellido_13	Nombre_13.Apellido_13@mail.com
12/05/2001 0:00:00	Nombre_39	Apellido_39	Nombre_39.Apellido_39@mail.com
12/05/2001 0:00:00	Nombre_26	Apellido_26	Nombre_26.Apellido_26@mail.com

In the application configuration you can find the parameter SQLQuery / Parameter, which allows to use a variable from the configuration. To use the parameter, you must write the name of the variable preceded by @, that is, when configuring the Id variable, the query must be in @ Id. For example:

```

Select id, [Date of birth], Names, Surnames, email
From [Users $ A1: F501]
Where id> @Id
```

Getting as result:

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**Conexión a ODBC**

DNS:

Usuario:

Password:

**Query SQL**

```
Select id, [Fecha nacimiento], Nombres, Apellidos, email
From [Usuarios$A1:F501]
Where id > @Id
```

Ejecutar query

id	Fecha nacimiento	Nombres	Apellidos	email
2	19/05/1980 0:00:00	Nombre_2	Apellido_2	Nombre_2.Apellido_2@mail.com
3	22/08/1981 0:00:00	Nombre_3	Apellido_3	Nombre_3.Apellido_3@mail.com
4	07/05/1986 0:00:00	Nombre_4	Apellido_4	Nombre_4.Apellido_4@mail.com
5	22/04/1972 0:00:00	Nombre_5	Apellido_5	Nombre_5.Apellido_5@mail.com
6	15/07/1960 0:00:00	Nombre_6	Apellido_6	Nombre_6.Apellido_6@mail.com
7	18/09/1945 0:00:00	Nombre_7	Apellido_7	Nombre_7.Apellido_7@mail.com
8	12/02/1989 0:00:00	Nombre_8	Apellido_8	Nombre_8.Apellido_8@mail.com
9	10/12/1970 0:00:00	Nombre_9	Apellido_9	Nombre_9.Apellido_9@mail.com
10	12/03/1973 0:00:00	Nombre_10	Apellido_10	Nombre_10.Apellido_10@mail.com
11	11/06/1953 0:00:00	Nombre_11	Apellido_11	Nombre_11.Apellido_11@mail.com
12	31/12/1947 0:00:00	Nombre_12	Apellido_12	Nombre_12.Apellido_12@mail.com
13	12/05/2001 0:00:00	Nombre_13	Apellido_13	Nombre_13.Apellido_13@mail.com
14	10/08/2000 0:00:00	Nombre_14	Apellido_14	Nombre_14.Apellido_14@mail.com

Exportar a Json

Once satisfied with the search result, it can be sent to FeedHub by clicking the Export to JSON button. Then Data2Feed will send the result of the search to FeedHub.

The feed set - which has a determined correlative order, for example, from 1 to 100 - is entered into the system; When the entered data is later displayed, it will do so from the most recent, the last data entered, which, of course, will reverse the original order. Thus, it will show them from 100 to 1.

To see the result of the load on the platform, enter it and access the Bases / Feed



The screenshot shows the MasterBase dashboard interface. At the top, there is a navigation bar with the MasterBase logo and several menu items: Bases, Campañas, Reportes, Tag, Automatas, and Configuración. Below this, there are three main sections: 'Contactos' (with sub-items: Crear Contacto, Ver/Modificar, Buscar, Eliminación Contactos), 'Segmentación' (with sub-items: Filtros Dinamicos, Filtros Estaticos), and 'Feed' (with sub-item: Listado de Feeds). The 'Feed' section is highlighted in yellow.

Subsequently, select the container where it was defined which feed to load and you will see the option "View Source data"

CFC10	Cliente	Pruebas Jose Luis - FEEDHUB	jmoreno@masterbase....	19/02/2016 10:24:59	Habilitado	Acciones ▾ Ver Estadística Ver Feeds Editar Copiar Key
CFC09	Cliente	CONTENEDOR DE PRUEBA PARA PATENTES SIN EMAIL	jmoreno@masterbase....	24/02/2016 09:15:12	Habilitado	
CFC08	Cliente	Disponible	jmoreno@masterbase....	28/03/2016 16:01:10	Deshabilitado	

CFC10: Pruebas Jose Luis - FEEDHUB				
1068	13/07/2016 11:43:42	{ "id": "200", "Nombres": "Nombre_200", "Apellidos": "Apellido_200", "email": "Nombre_200.Apellido_200@mail.com", "Fecha nacimiento": "22-04		Detalle
1067	13/07/2016 11:43:42	{ "id": "199", "Nombres": "Nombre_199", "Apellidos": "Apellido_199", "email": "Nombre_199.Apellido_199@mail.com", "Fecha nacimiento": "07-05		Detalle
1066	13/07/2016 11:43:42	{ "id": "198", "Nombres": "Nombre_198", "Apellidos": "Apellido_198", "email": "Nombre_198.Apellido_198@mail.com", "Fecha nacimiento": "22-08		Detalle
1065	13/07/2016 11:43:42	{ "id": "197", "Nombres": "Nombre_197", "Apellidos": "Apellido_197", "email": "Nombre_197.Apellido_197@mail.com", "Fecha nacimiento": "19-05		Detalle

You can configure as many ODBC connections as you want to load to the containers, but note that it is necessary to configure the Data2Feed XML for each container. It is recommended to install a Data2Feed for each container to be fed.