



Organizational Unit Import – Antura Integration Standard

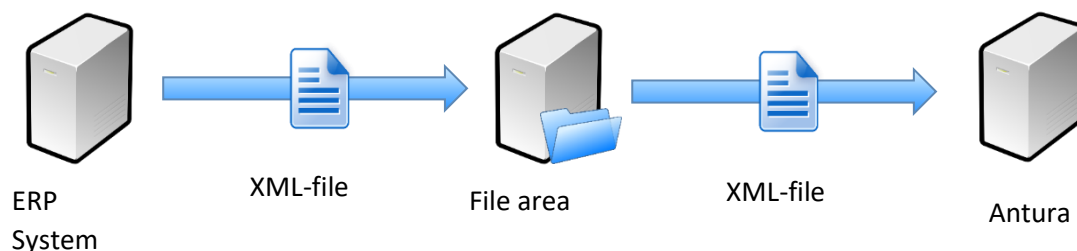
Organizational Unit Import – Antura Integration Standard

Background

Since 2017, Antura has been offering its customers to import information into Antura using Antura Integration Standard. Integration Standard are a kind of add-on products that are continuously updated, in a similar way to Antura, where customers who license them can choose when they want to upgrade to a new version. Unlike custom integrations, Antura Integration Standard are offered to the entire Antura customer base and thus also driven forward by the same.

Technical description

The integration with Antura takes place through a file transfer from the customers ERP system to a file area from which the integration imports the file. The integration is a one-way integration, which only updates the organization tree in Antura. A XML-file is sent to the intended Area for Antura.



File format

Example file (XML)

```
<?xml version="1.0" encoding="UTF-8"?>
<organizationalUnits>
  <organizationalUnit>
    <name>IT</name>
    <parentRef></parentRef>
    <description>A description of IT org.unit</description>
    <reference>IT</reference>
    <portfolioProperties>
      <portfolioProperty>
        <name>SomeText</name>
        <value>abc</value>
      </portfolioProperty>
    </portfolioProperties>
  </organizationalUnit>
</organizationalUnits>
```

```

    <portfolioProperty>
      <name>TextListMultiValue</name>
      <value>IT</value>
      <value>Support</value>
    </portfolioProperty>
  </portfolioProperties>
</organizationalUnit>
<organizationalUnit>
  <name>IT Operations</name>
  <description>Description of operations org.unit</description>
  <reference>123</reference>
  <parentReference>IT</parentReference>
  <portfolioProperties>
    <portfolioProperty>
      <name>SomeText</name>
      <value>def</value>
    </portfolioProperty>
    <portfolioProperty>
      <name>TextListMultiValue</name>
    </portfolioProperty>
  </portfolioProperties>
</organizationalUnit>
</organizationalUnits>

```

Mapping fields in the file

XML	Customer system	Example	Comment
name		IT Operations	Name of the organizational unit that should be created. Mandatory.
parentRef		IT	The reference of the parent to the

		organizational unit to be created.
description	IT Operations - Company	Description of organizational unit, visible in Antura.
reference	D1	Referencevalue/cod for the org organizational unit.
portfolioProperty		Specifies the start section for portfolio properties.
name	Sometext	The name of portfolio property.
Value	abc	The value of project property.

Example

Name	Parent name	Description	Reference
IT			IT
IT Operations	IT	A description of the org.unit	123
And so on..			

Results (From the visual example)

From the view Organizational units:

☐	Organizational unit	Description
☐	 IT	
☐	 IT Operations	A description of the org.unit

From the dialog box for org. Unit "IT Operations":

Edit organizational unit (IT Operations)

Organizational unit	
Name:	IT Operations
Reference:	123
Description:	A description of the org.unit
Main unit:	IT 

Functionality

The integration runs once a night and will import the files that are available when the run starts.

Validation

When the integration runs it is validated, and its contents as follows:

- Field *Reference* cannot be empty for any of the organizational units
- Field *Reference* is mandatory to be unique in the file
- If an organizational unit should be reference to a parent, <ParentRef>, then the parent needs to be in the file.

Import

After validation, the file will be processed and split in three parts: New organizational units, updated organizational units and deleted organizational units.

1. *New organizational units*

Organizational units that exist in the import file but not in Antura. The comparison will be done on the field *Reference*.

2. *Updated organizational units*

Organizational units that exist in the import file and in Antura. The comparison will be done on the field *Reference*.

3. *Deleted organizational units*

Organizational units that do not exist in the import file but exist in Antura Projects. The comparison will be done on the field *Reference*.

Logic in import

After the import file has been imported, the three different parts are executed in the following order:

- Deletion of organizational unit
- Updated organizational unit
- New organizational unit

Deletion

The first thing that is done when importing is that the list of deletion of organizational units is reviewed. If there are resources, projects, time or/and resource owners connected to the organizational unit, the import will move all of them to *No organizational unit*. All children Organizational units who previously was connected to the parent unit that is now being deleted will be changed to parent units. The child Organizational unit can have a new parent unit in the next step, *Updated*.

Updated

All organizational units in the file will be compared to existing organizational units in Antura Projects and then updated. The key is the field *Reference*. Fields that are updated for organizational units are name, description and if they should have a new parent organizational unit.

New organizational unit

The list of organizational units to create is reviewed and these are created in Antura Projects. Check is made that each parent of the organizational unit exists either in Antura Projects or in the list of changed organizational units.

Portfolio properties

The import supports importing portfolio property values for organizational units. The portfolio property name must exist in Antura and be unique. For property type *list*, *numeric list* and *user*, the reference value must already exist. Date format for property type *date* is yyyy-MM-dd. Dot (.) is the decimal separator for numeric properties. If the <Value> tag is empty in the import file, the property will be set to a blank value in Antura.

Configuration

Comment	Value
Import activated	True/False
One or more email address that will be recipient for reports, separate email with semicolon	

Error management

In connection with an import, the following reports can be sent. The reports are sent to one or more predefined email addresses.

Reconciliation report

The reconciliation report shows the total amount imported and the total amount in the file.

Error report

The error report shows organizational units that could not be imported.

This report is only sent if errors occur.

Error report for unexpected errors

If an unexpected error occurs during the import, it will be interrupted.

The mail sent contains no details. Troubleshooting takes place with Antura's support.

This mail is sent, for example, if the format of the import file is not correct, if any required fields are missing, or if other unexpected errors occur.

Prerequisites (for internal installation)

For internal installation

- The folder where the import file is to be read must exist and be configured during installation.
- The folder where the import file is to be read must be unique and not used by any other import.
- The system account (application pool user) running Antura must have write permissions in the folder where the import file is added.

Other

- The import file will be archived after the completed import.
- The integration is built against the latest available version of Antura when the development starts.