

Use the Import Data Wizard

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Permissions

You will require an Access Role with the following permissions:

- Imports/Exports

Note: In order to use the Import Data Wizard, you will need to use Internet Explorer in compatibility mode.

1. Navigate from the Home page to **Administrative Settings | Imports/Exports | Import Data Wizard**.
2. Select a **File Type** from the drop-down list.

The screenshot shows the 'Import Data Wizard' interface. At the top, there is a progress bar with four steps: 1. Select a file to import (highlighted in yellow), 2. File sample, 3. Match fields, and 4. Import progress. Below the progress bar, there are two input fields: 'File Type:' with a dropdown menu set to 'Excel Spreadsheet', and 'File Name:' with a 'Choose file' button and the text 'No file chosen'. At the bottom, there are two buttons: 'next' and 'cancel'.

3. Click **Browse** to search your computer for the import file which matches the File Type you have selected. In this example, the following table will be used to import Employees into the system.

[ImportDataEmployees.pdf](#)

Note: In order to import data, all mandatory fields for the product area destination must be included.

4. Click **Next** to proceed to the File Sample screen. A screenshot of your uploaded file will display.

Import Data Wizard

1 Select a file to import 2 File sample 3 Match fields 4 Import progress

First row has column names:

Worksheet:

File Sample

Username	Title	First Name	Surname	Archived
Karl	Mr	Karl	Wates	TRUE
Eleanor	Miss	Eleanor	Myri	TRUE
Shane	Mr	Shane	Dool	TRUE
AlexW	Mr	Alex	Winters	TRUE
KieronD	Mr	Kieron	Deannor	TRUE
Oliver	Mr	Oliver	Stone	TRUE

5. Depending on the file you are importing, there will be different options available to configure:

Field	Description
First row has column names	From the drop-down list select Yes or No to confirm if the first row of the spreadsheet includes column names that are not required in the import.
Worksheet	From the drop-down list, select which worksheet to upload.
Header rows to skip	Enter which rows you do not wish to include in the import.

- Click **Next** to proceed to the Match Fields screen. Here you can select which report you would like to import the information to.
- From the drop-down list, select a **Destination** where you like to import the file to. The **Source Column** will display the headings of the data you wish to import.
- In the **Destination Column**, click on each cell to display a drop-down list of fields allowing you to select a location to import your data to. For example, in the image above, the first Source Column cell is 'Username' so click on the adjacent Destination Column cell and select 'Username' from the drop-down list to match the two fields.
- Once you have completed the matching process, click **Next** to proceed to the Import Progress screen.
- In the **Default Value** column, click on each cell to enter a default value for the fields that do not contain import data.

11. Click **Next** to begin the import. A log will display if the import is successful or if any errors occur:
 12. If the import is successful, click **Finish** to return to the Exports page or **Previous** to return to the previous step to correct any errors, if they occur.
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