

# Create an Import template


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## Permissions

You will require an Access Role with the following permissions:

- Imports/Exports







1. Navigate from the Home page to **Administrative Settings | Imports/Exports | Import Templates**
2. From the Page Options menu, click **Add Import Template Mapping** to open the Import Template General Details.

**Note:** Click  to modify an existing template. Any changes made will impact how data is imported.

**Page Options**  
[Add Import Template Mapping](#)

### Import Templates

**General Details**

		Name of the Import Template ▲	Application Type	Is the template automated	Trust Name	Trust VPD
		ESR v 1.0 Template	ESR Outbound V1.0	<input checked="" type="checkbox"/>	Selenity ESR v 1.0 Template	261
		ESR v2.0 Template	ESR Outbound V2.0	<input checked="" type="checkbox"/>	Selenity Test Esr V2.0	262

3. Complete the required fields within the **General Details** section:

Fields	Description
Template Name*	Type in a name for the template.
Application Type*	From the drop-down list, select an application type.
Trust*	From the drop-down list, select a trust. <b>Note:</b> The NHS Details must first be completed in order for a trust to appear in the drop-down list.

4. Click on each tab to configure the template mapping.

**Note:** Only the first two tabs are available on ESR Version 1.

Import Template: New

## Import Template Details

### General Details

Template Name\*  Application Type\*

Trust\*

**Employee** Assignment Location Organisation Position Phone Address Vehicle Costing

Column Name	Database Table	Database Field
Person ID	<input data-bbox="655 613 887 651" type="text" value="ESR Persons Record:"/>	<input data-bbox="1023 613 1254 651" type="text" value="Unique ESR Person I"/>
Effective Start Date	<input data-bbox="655 669 887 707" type="text" value="Employees"/>	<input data-bbox="1023 669 1254 707" type="text" value="ESR Effective Start D"/>
Effective End Date	<input data-bbox="655 725 887 763" type="text" value="Employees"/>	<input data-bbox="1023 725 1254 763" type="text" value="ESR Effective End Da"/>

5. Click **Save** to confirm.

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