Create an Import template

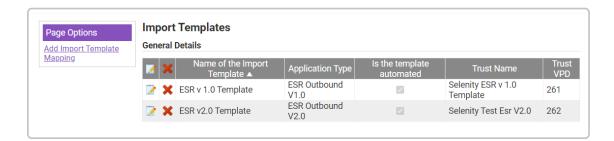
Last Modified on 05/03/2021 9:48 am GMT

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 \nearrow to modify an existing template. Any changes made will impact how data is imported.

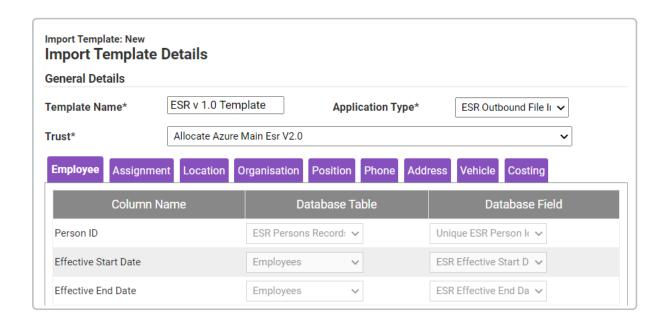


3. Complete the required fields within the General Details section:

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. Note: 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.



5. Click Save to confirm.