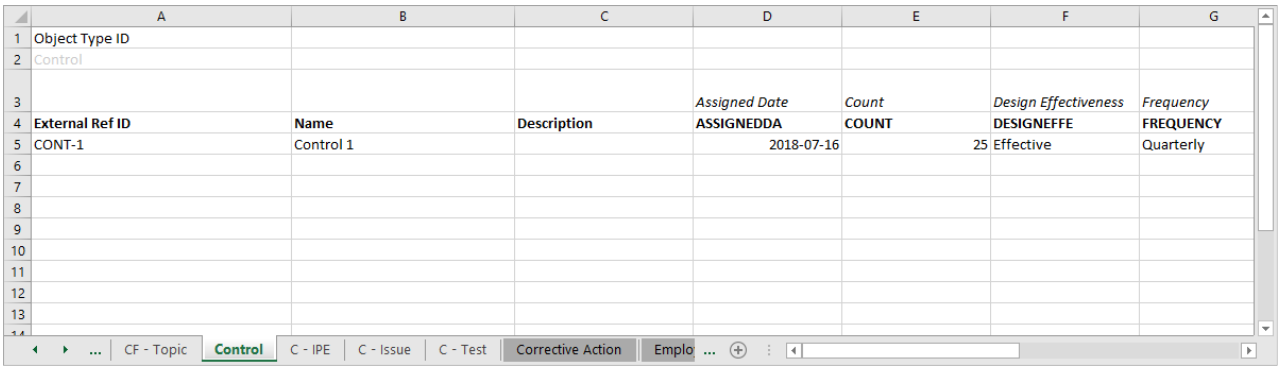
Enter New Object Data on the Import Template

This section outlines how to create new objects using the **Data Import** feature. For information on updating objects, see Update Existing Object Data on the Import Spreadsheet.

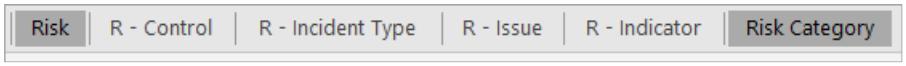


	A	B	C	D	E	F	G
1	Object Type ID						
2	Control						
3				*Assigned Date*	*Count*	*Design Effectiveness*	*Frequency*
4	**External Ref ID**	**Name**	**Description**	**ASSIGNEDDA**	**COUNT**	**DESIGNEFFE**	**FREQUENCY**
5	CONT-1	Control 1		2018-07-16	25	Effective	Quarterly
6							
7							
8							
9							
10							
11							
12							
13							

An import template.

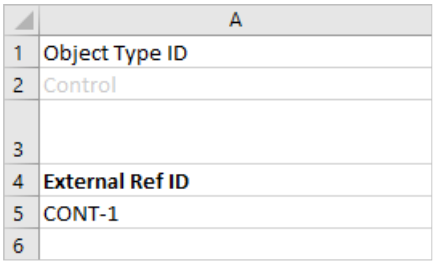
To import new object data:

1. Review the **Important Notes** section of the Data Import Overview article.
2. Open the data import template. See the Create an Import Template article for instructions on generating this spreadsheet.
3. Click an object type tab, which are highlighted, to open its worksheet (e.g. Risk). Tabs are generated in alphabetical order, with relationship tabs labelled with the monogram of the object type they're saved on and their object type group (e.g. R - Control). See Enter Relationship Data on the Import Spreadsheet for instructions on mapping relationship objects. Tabs are generated in alphabetical order.



Tabs on an import template spreadsheet. Object type tabs are highlighted (e.g. Risk and Risk Category) and the relationship tabs are labelled by their associated object type's monogram and object type group.

4. On row 5, column A of the spreadsheet, below **External Ref ID**, enter a name or code to identify the object in the system. The reference ID may be whatever you choose; however, each ID must:
   - Be unique from all other external reference IDs;
   - Have 300 characters or fewer; and
   - Not contain the colon (:) character.



	A
1	Object Type ID
2	Control
3	
4	**External Ref ID**
5	CONT-1
6	

The External Ref ID column, below the Object Type ID.

5. On row 5, column B of the spreadsheet, below **Name**, enter the name of the object.

B	C
Name	**Description**
Control 1	

The Name and Description columns. An object description is optional.

6. **Optional:** On row 5, column C, below **Description**, enter a description of the object.

7. To import data into a field linked to the object type, enter data below the field's column. Field columns begin at column D and are labelled in row 3 with the field's name and in row 4 as the field's **Unique Name**. If the field is:

   - Text: Enter the data as needed. If RTF is enabled, you may apply basic HTML formatting, if required. See the Rich Text Formatting article for more information.
   - Numeric: Enter numbers only.
   - Date & Time: Enter a date and/or time. Core will automatically modify the field entry to show the date and/or time based on the format selected in the field's settings. Date and time data is imported in the UTC time zone, as such, it may be necessary to include a time when importing a date (e.g. 12:00 pm) to avoid the date being recorded one day in advance due to a time difference.
   - Select List: Enter an option from the select list. Select list options are not case-sensitive when importing data; however, all other characters entered into the spreadsheet must match the option exactly.
   - Multi-Select List: Enter one or more of the options from the select list, separated by commas, with no spaces (e.g. high,medium,low). Select list options are not case-sensitive when importing data, however, all other characters entered into the spreadsheet must match the option(s) exactly.
   - Attachment: See the Import File Attachments article for information and instructions.

D	E	F	G
Assigned Date	*Automated Control*	*Count*	*Design Effectiveness*
ASSIGNEDDA	**AUTOMATEDC**	**COUNT**	**DESIGNEFFE**
January 18, 2018		5	Effective

Entering data to import into the object's fields.

8. To assign users from a specific role to the object:

   a. Locate a role column in the spreadsheet. Role columns appear after field columns and are labelled in row 3 as **Assignable Role** and in row 4 as the role's name.

   b. Enter the user's email address as it's saved in their profile in a cell below the desired column. If you're assigning multiple users, separate the users' email addresses by commas (e.g. user1@example.com,user2@example.com).

   c. Continue assigning users to additional roles, if any.

N	O	P	Q
Assignable Role	*Assignable Role*		
Owner	**Reviewer**		
user1@example.com	user1@example.com,user2@example.com		

Role columns in the template.

9. To assign a workflow state to the object:

   a. Locate a workflow column in the spreadsheet. Workflow columns appear after any role columns and are labelled in row 3 as **Library Workflow** and in row 4 as the workflow's name.

b. Enter the state's name as it's saved in the workflow (e.g. In Progress) below the workflow column.

P
Library Workflow
Control Status
In Progress

A workflow column in the template.

10. Repeat the steps above to continue adding data, as needed. If you do not wish to add data to an additional field, role, or workflow, leave the cells below the respective columns blank. To import data on a different object type, select the appropriate worksheet.
11. Save your changes.
12. Upload the spreadsheet to complete the import.