Resolver.
A KROLL BUSINESS

Enter New Object Data on the Import Template

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Overview

This article outlines how to create new objects using the **Data Import** feature. In Resolver, an object refers to a record saved to a particular object type (i.e., the record category). For example, an Incident is an object type, while the Incident object itself could be a car accident, which notes what happened on-site.

User Account Requirements

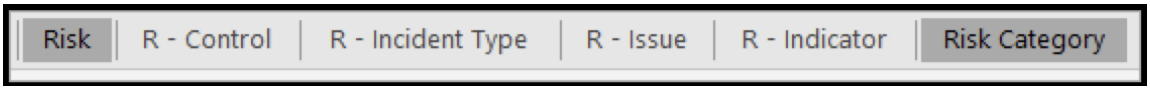
The user account you use to log into Resolver must have Administrator permission to access the Data Import feature.

Related Information/Setup

Please refer to the Data Import section for more information on the Data Import feature.

Adding New Object Data on the Import Template

1. On the Data Import template, click a highlighted object type tab (e.g., Risk) to open its related worksheet.



Tabs on a Data Import Template

- Tabs generate 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)
- An object type's fields are where users will input data. Fields can be in text or numeric forms, a date and time picker, or take the form of select (i.e., dropdown) lists. They also allow for attachment and image uploads. Read more here: Field.
- As you enter information into the Data Import template, follow the column fields (not the row fields). 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.
- Resolver automatically modifies the field entry to show the date and/or time based on the Date (not General) Number format selected in the Excel section's settings.
- Date & Time data is imported in the Coordinated Universal Time (UTC) zone. As such,

you may need to note a time (e.g., 12:00 pm) when importing a date, so the date won’t be recorded one day in advance, due to a time difference.

> ***Note:***
> Specific time data is not required for system/spreadsheet functionality.

2. On the spreadsheet (Row 5 Column A), below the External Ref ID heading, enter a name or code to identify the object in the system.
    - The External Reference ID is a required field and must:
        - Be unique from all other External Ref IDs
        - Have 300 characters or less
        - Not contain the colon (:) character
        - A suggested External Ref ID is the monogram with a sequential number (e.g., 1, 2, 3).

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

An Example External Ref ID

3. Enter the object name on the spreadsheet (Row 5 Column B) below Name.

B	C
Name	**Description**
Control 1	

Name and Description Columns

4. **(Optional):** Enter an object description (Row 5, Column C) below **Description**.

5. To enter data into a field linked to the object type, input the relevant information in the related Excel column (e.g., enter the External Ref ID under the object type ID).

- Text: Enter the data as needed.
- Numeric: Enter numbers only.
- Date & Time: Enter a date and/or time.
- Select List: Choose an option (e.g., Incident Severity) from the select list in Resolver, which is not case-sensitive on data imports. 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). Multi-select list options are not case-sensitive on data imports. However, all other characters entered into the spreadsheet must match the option(s) exactly.

6. Attachment: Enter the expected path and file name (e.g., Reports/October 2 break in.jpg), for any imported files in the appropriate attachment field column in the spreadsheet. Read more here: Import File Attachments.

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

Related Excel Columns

7. To assign users from a specific role to the object:
   a. Make sure all relevant users have been added to Resolver and to the related role (otherwise your data import will fail).
   b. 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 (e.g., Owner).
   c. Enter the user’s company email address in a section below the desired column (e.g., Column N). If you're assigning multiple users, separate the users' email addresses by commas (e.g., lucian.ford2653@coreqe.com, somchai.tan_2653@coreqe.com).
   d. Under the column Assignable Role (e.g., Columns N or O below), enter the relevant users’ email addresses.
   e. Continue assigning users to other roles, if any.

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

Role Columns

8. To assign a workflow state to the object:

    a. Locate a Workflow column in the spreadsheet to the right of any Role columns.

    b. Enter the state's name (e.g., In Progress) as in the workflow (e.g., Control Status) below the Library Workflow column (e.g., Column P).

    c. Repeat the steps above to continue adding data (as needed) on the worksheet.

    d. To import data on a different object type (e.g., Control), select the relevant worksheet.

> ***Warning:***
> *If you don't want to add data to another field, role, or workflow, leave the sections below the columns blank.*

9. Save your changes.