

Enter Relationship Data on the Import Template

Last Modified on 01/25/2023 8:13 pm EST

A Relationship connects two or more object types together (e.g., Company and Business Unit) in Core. Such relationships help you map the big picture for your organization and understand the impacts and accountabilities as you record, track, report, and manage information.

EXAMPLE

- You want to link a person to their last known location, so response teams will know who they're looking for and where that Person may be. To do so, create a relationship (e.g., P-Location) between the Person (PERS) object type and the Location (LOC) object type.
- You input the Person and Location data in the Data Import spreadsheet. This Person-Location relationship will show that Melvin Jacks, the Person of Interest's last known location was the City Shopping Mall.

	A	B	C	D
1	Relationship ID	Object Type ID	Object Type ID	
2	Person-Location	Person	Location	
3	Person	(optional)	Location	(optional)
4	OB1 Ext Ref ID	Object Name	OB2 Ext Ref ID	Object Name
5	PERS-1	Melvin Jacks	LOC-1	City Shopping Mall
6				
7				

Data entered into a relationship worksheet on the template.

- If you're creating relationships between objects on the same Data Import Template, copy all the relevant reference IDs from the related Object's worksheet to post on the relationship tab (e.g., Risk to R-Control).
- Updating object data requires the object's **External Reference ID**, which you can get by:



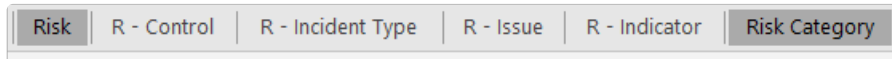
- Viewing a previously uploaded Data Import Template (e.g., one that has had Object Type field changes since your company's Core system implementation)
- Using the [Audit Trail](#) feature
- Generating the **External Reference ID** data in a [report table](#).

To enter relationship data on the Data Import Template:

1. Click the Relationship tab to open its worksheet.
 - 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).

- Object type tabs are highlighted. See more: [Enter New Object Data on the Import Spreadsheet](#).



Tabs on a Data Import Template. Object type tabs are highlighted (e.g., Risk and Risk Category). The relationship tabs are labelled by their associated object type's monogram and object type group (e.g., R-Incident Type).

2. Enter the external reference ID (e.g., PERS-1) of the Person object with the relationship saved to it (Row 5, Column A) under **OB1 Ext Ref ID**.
3. Enter the external reference ID of the Location object (e.g., LOC-1) that the relationship will pull data from (Row 5, Column C) under **OB2 Ext Ref ID**.



- To import relationships from one object to another (e.g., C-Business Unit), you must enter both objects' unique **External Reference IDs** on the Excel spreadsheet.
- **Object Name** in columns B and D are optional fields, meaning that your data import will not fail if those sections are left blank.
- Regardless, we recommend adding the Object Name so that you can clearly see what objects are related to one another.
- Existing relationships between Objects can't be removed using a Data Import. If required, objects can be [unlinked](#) from the reference or relationship object.

4. Save your changes.