

Upload the Import Template

Before completing the import, you must ensure the import template has been generated and the object and relationship data has been entered correctly on the appropriate worksheet. See the following articles for more information:

- [Create an Import Template](#)
- [Enter New Object Data on the Import Template](#)
- [Enter Relationship Data on the Import Template](#)
- [Enter Updated Object Data on the Import Template](#)

Data Import

Drag and drop (or browse for) a Core-configured Excel data import file.

Drag file here or click to upload

One file can be uploaded at a time. Date field values will be imported in UTC timezone

Defer processing of formula and permission recalculations

Verify file only


Identifier type

Object Type External Reference ID ▼

The importer supports using Object Type External Reference IDs or Object Type IDs

The file upload section of the Data Import page.

To upload the template into Core:


1. Review the Important Notes section of the [Data Import Overview](#) article.
2. Click the  icon in the top bar > **Data Import** in the **Tools** section.
3. From the **Identifier type** dropdown menu, select either **Object Type External Reference ID** (if you've entered the [External Reference](#) Object Type IDs and/or the External Reference Relationship Type IDs on the spreadsheet) or **Object ID** (if you've entered the object type IDs and/or relationship IDs on the spreadsheet).
4. **Optional:** Select the **Defer processing of formula and permission calculations** to postpone formula and permission recalculations when the file is uploaded.



Depending on the complexity of the relationships and formulas, it's generally recommended that deferrals are enabled for imports that include more than 50,000 objects. Contact [Resolver Support](#) for assistance should you wish to complete an import with this option selected.

5. **Optional:** Select the **Verify file only** checkbox before uploading the file to check the data has been entered correctly. If this option is selected, deselect the checkbox then re-upload the file (provided the information is valid) once you're ready to complete the import.
6. Drag and drop the file to the upload area or click the area to locate and open the file for upload.
7. If needed, correct any errors on the spreadsheet, save your changes, then re-upload the file.

Drag and drop (or browse for) a Core-configured Excel data import file.

 data import.xlsx x

Drag file here or click to upload

⚠ There were problems with the file:

- no or invalid object type id provided on sheet OBJECT NAME 1
- cannot find object type 70388 on sheet OBJECT NAME 22
- cannot find object type 4 on sheet OBJECT NAME 2
- source ref INC-14 not a valid external reference id -- dest was PER-7
- source ref INC-14 not a valid external reference id -- dest was PER-8
- source ref INC-14 not a valid external reference id -- dest was PER-9
- invalid relationship type id 1

One file can be uploaded at a time. Date field values will be imported in UTC timezone

Verify file only

Identifier type

Object ID ▼

The import supports using External References as well as Object IDs

An uploaded spreadsheet with errors. Errors in the spreadsheet will prevent successful import whether or not you've selected the Verify file only checkbox.

When an import is successful, a confirmation message is displayed. If you're importing a large amount of data or data that includes role assignments, the import process may not complete immediately, depending on the amount of data, the complexity of the role's permissions, and/or the number of roles being assigned. In this case, a message will be displayed when the import is in progress and when it's completed.