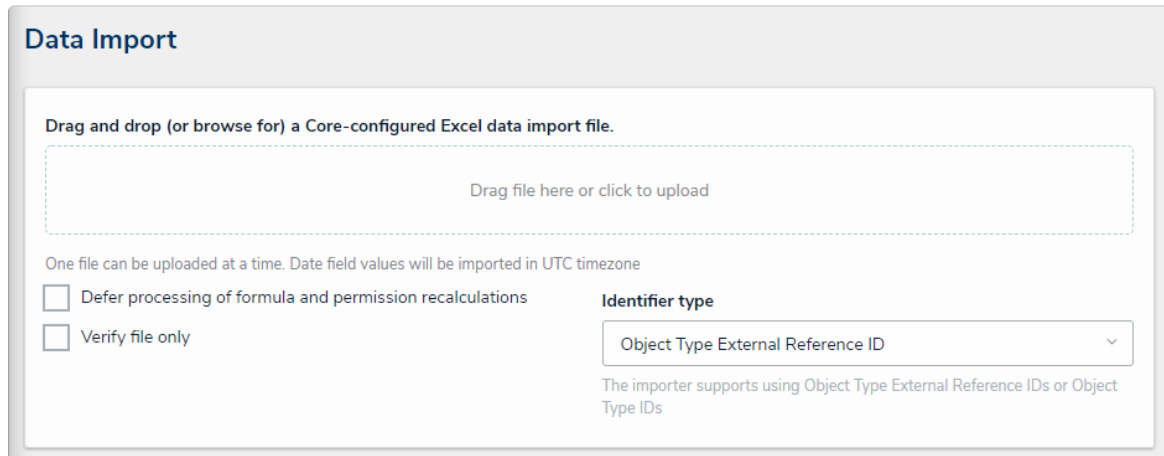


Uploading the Data Import Template

Last Modified on 11/10/2023 4:19 pm EST

Before uploading the data import, you must ensure you've generated the import template and correctly entered the object and relationship data on the right worksheets.


When you've input the required information on your Data Import Template, you'll be ready to upload that Excel spreadsheet with your company's library data into Core, where it will become a single source of truth for your organization and team.



The screenshot shows the 'Data Import' interface. At the top, it says 'Data Import'. Below that, there's a dashed box with the text 'Drag and drop (or browse for) a Core-configured Excel data import file.' and 'Drag file here or click to upload'. Underneath, there's a note: 'One file can be uploaded at a time. Date field values will be imported in UTC timezone'. There are two checkboxes: 'Defer processing of formula and permission recalculations' and 'Verify file only'. To the right, there's a dropdown menu labeled 'Identifier type' with 'Object Type External Reference ID' selected. Below the dropdown, it says 'The importer supports using Object Type External Reference IDs or Object Type IDs'.

The Data Import page's file upload section.

To upload the Data Import Template into Core:

1. Click the  icon in the top bar > **Data Import** in the **Tools** section.
2. 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).
3. **Optional:** Select the **Defer processing of formula and permission calculations** to postpone formula and permission recalculations when the Data Import Template file uploads.



Depending on the relationships and formulas' complexity, deferrals should usually be enabled for imports with more than 50,000 objects, as it will speed up the data import process. Contact [Resolver Support](#) for help with completing an import with this option selected.

4. Before uploading the file, click the **Verify file only** checkbox to check the data was entered correctly.
 - The Verify File Only checkbox will perform a test import without altering your data. It

shows you any existing Data Import Template errors and what specific fields they're occurring on. This practice will help reduce any possible confusion and you having to review your spreadsheet line by line if errors are reported.

5. If there are no file errors detected, drag and drop the file to the upload area or click the area to find and open the file for upload.
 - a. Ensure the Verify File Only checkbox is de-selected before uploading.

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

A spreadsheet uploaded with errors, which will prevent a successful Data Import (whether or not you've clicked the Verify file only checkbox). An uploaded spreadsheet with errors. Errors in the spreadsheet will prevent successful import whether you've selected the Verify file only checkbox.

6. If needed, correct any errors on the spreadsheet, save your changes, then re-upload the file.

Data Import Completed

Data Import

Import Completed Successfully

- IM Annotated Data Import - Beta Version.xlsx

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

IM Annotated Data Import - Beta Version.xlsx x

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 recalculations

Verify file only

Identifier type

Object Type External Reference ID

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

A successful Data Import confirmation message.

- A confirmation message displays when an import is successful, meaning that your library data is now uploaded into the Core platform and is ready to be used for recording, tracking, reporting, and managing your company's information.
- 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
 - Complexity of the role's permissions, and/or
 - Number of roles assigned. In this case, a message displays when the import is in progress and when it's completed.