

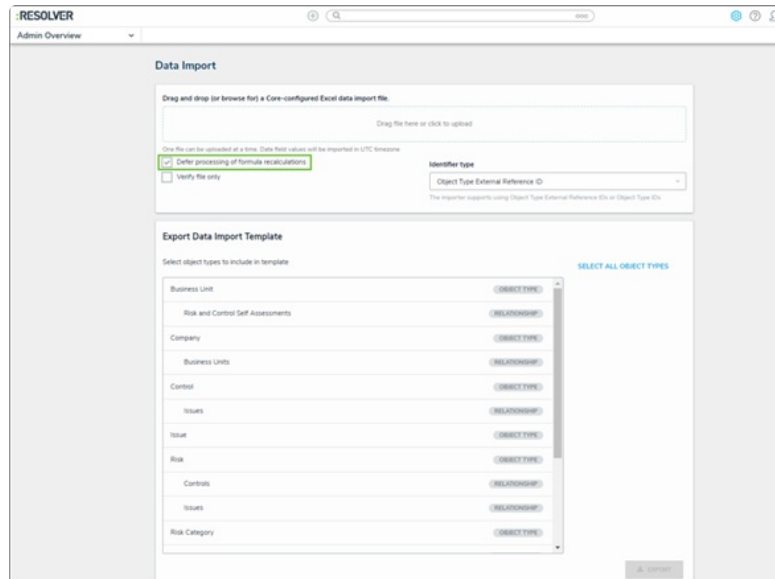
Data Import Overview

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- The Data Import Template creates one source of truth for documentation and data within your systems. This Excel spreadsheet is used to perform a variety of activities in Core, such as completing a Risk and Control Self-Assessment, or tracking incidents (e.g., a data breach) and how they're managed within the company (e.g., adding new access restrictions).
- The Data Import Template includes multiple worksheets organized with color-coded tabs and is used solely by Core Administrators, typically during the project implementation stage.
- The Data Import feature lets you create or update objects (e.g., a company) and map relationships between two objects (e.g., between a company and a business unit). You can also add or edit data in an object's field values, roles, and states, but it can't create new object types, fields, or relationships.
- Depending on the application you're using (e.g., Enterprise Risk Management - ERM), this Data Import can also cover incidents, their related risks and the required controls put in place within the organization.
- You perform these data import activities by entering your library data into an Excel template generated from the admin settings, then uploading that template into Core.

User Tips & System Requirements

- Core Administrators are users with advanced knowledge of and access to Core and its various configurations.
 - To properly access the Data Import functionality, these users must be enabled as Administrators on the back end in their specific organization (e.g., Incident Management).
- The Data Import feature uploads templates with up to 15 MB of data.
 - Zip files can upload up to 500 MB of data from a single attachment.
 - If a zipped file contains multiple attachments with an average file size of less than 1 MB, up to 200 MB is accepted.
- There may be a delay in completing imports that include role assignments, depending on the complexity of the role's permissions and/or the number of roles assigned. Click **Defer processing of formula recalculations** for imports containing more than 50,000 objects.



The Data Import page with the Defer processing of formula recalculations checkbox selected.

- If 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.
- Data Import does **NOT** support [assessment](#) data (which is a point in time reference that copies the Data Import's static library data to complete the assessment).
- Do not change any of the auto-generated headers in rows 1-4 of the Data Import spreadsheet, as it will cause an error when the template uploads.
- Workflow transitions and actions are not activated on imported objects.
- Therefore, you can't delete existing property, field, role, or workflow data by entering a blank value in the spreadsheet.
- If a field, role, or workflow in Core already holds data, importing data into that field, role, or workflow will overwrite any existing values.