ADMIN GUIDE: IMPORT MODULE V1.1

The Import module allows users to mass upload new information into DCI. Now let's learn how to use the Import module and all it has to offer.

Import Module Overview

The Import module is a background process that runs and will send a notification to the user once the upload has completed. The initial file must be saved as a Text (tab delimited) file and use the correct import columns and values. For specific file and formatting requirements, view the "Admin Guide: Import Formats" document in the Help Center.

After importing, you will receive a notification informing you that the upload was either a complete success or if some records failed. If there were records that failed, you can view a .txt or excel file that lists explicitly what rows failed and why.

For example, if you wanted to mass create new employee profiles you could utilize the 'Employees Profile' import to save time.

Before moving forward, please ensure that you have 'Import Admin' permissions within DCI.

Import Process

Permissions/Roles Needed: Import Admin Permission

To import a file:

1. Create a .txt file that includes all required fields and populate the data you wish to import.
    a. To create a .txt file, simply enter all data into an excel spreadsheet and File → Save As → Change the Save as Type from Excel Workbook to 'Text (Tab delimited)'
2. Login to a profile with the appropriate role and/or permission via the DCI website
3. From the header choose 'Import'
4. Hover over the category of import you would like to initiate, then select the specific import function from the fly out menu
5. Select 'Actions' then 'Upload File'
6. Click 'Upload tab delimited TXT file' and find the file you wish to upload on your hard drive
7. Select 'Save' then click 'Yes' on the confirmation window
    a. The import will run as a background process. You will receive a notification with the status and results (including successful and failed import rows) which we will cover in the next section.
    b. If you set up the import file incorrectly the system will alert you that there are missing columns that need to be added before you can continue. Hover over the information icon to the right of the missing file text to determine which columns need to be added for a successful import.
8. You will receive a second confirmation window alerting you that the import process has started. Click 'Ok'.

Notifications

To check for Import notifications:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Once you have initiated the import, click the mail icon in the top right corner to the left of 'Help'
3. Select 'See All Messages'
4. You will see a message from DCI Support with a subject line informing you if the import was successful or if it failed
    a. If you do not see any messages, continue to refresh your inbox by reloading the page. Your import may still be processing and will need a few minutes to finalize.
    b. You will also receive an email to you linked DCI account with a hyperlink to open the Import Message Details within DCI.
5. Click anywhere in the message row to view the Message Details
6. Beneath the 'From' and 'To' fields you will see text informing you if your import failed or succeeded. Click on the blue hyperlinked text to open the Import information. To navigate this screen, follow the instructions in the Import Details section below.

Import Details

Permissions/Roles Needed: Import Admin Permission

To filter/export Attachments:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. From the header choose 'Import'
3. Hover over the category of import you would like to view, then select the specific import function from the fly out menu
4. You have the ability to filter the Attachments by start and end dates, file name, file type and who added the Attachment. Simply enter the search criteria in the fields then click 'Search'. If you wish to reset the search filters, click 'Reset'
5. To export your view, simply click 'Export' and the file will automatically download to your computer in the Attachments default format.

To view/download Attachments:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. From the header choose 'Import'
3. Hover over the category of import you would like to view, then select the specific import function from the fly out menu
4. Under the 'Import Details' you will see an 'Attachments' header, click anywhere in the row to select a particular Import attachment
5. This will open the Attachment Details screen. Attachment Details will display the Attachment ID, date, name, file type, file size, note ID, and who added the attachment
6. To simply download the attachment click on the blue download icon in the Name field.

       a. Click on this icon and the file will automatically download to your computer in the attachments default format.
7. To view the Note associated with the attachment, click the Note ID hyperlink on this screen and you will be redirected to the Note Details for that particular attachment.
8. In the Note Details section of that screen, you will see the Note ID, date, type, who added the note, subject, description, and another hyperlink to the attachment file.
       a. Click on attachments text hyperlink and the file will automatically download to your computer in the attachments default format.

To filter/export Events:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. From the header choose 'Import'
3. Hover over the category of import you would like to view, then select the specific import function from the fly out menu
4. Under the 'Import Details' you will see an 'Attachments' header, click on 'Events' next to that header
5. You have the ability to filter the Events by start and end dates, subject and who initiated the Event. Simply enter the search criteria in the fields then click 'Search'. If you wish to reset the search filters, click 'Reset'
6. To export your view, simply click 'Export' and the file will automatically download to your computer as a CSV file

Checking for Failed/Successful Import Rows

Permissions/Roles Needed: Import Admin Permission

To check for failed Import rows:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. From the header choose 'Import'
3. Hover over the category of import you would like to view, then select the specific import function from the fly out menu
4. Under the 'Import Details' you will see an 'Attachments' header, find the import row you wish to check. The file name will contain the text 'Result'. Select the blue download icon in the far right column labeled ' Download'
5. The results file will automatically download to your computer in the attachments default format

For ease of use, DCI recommends opening the results file in Excel. If you are familiar with using .TXT files, feel free to open the results file in its original format. You will be able to analyze and decipher data in either format, using Excel allows for a cleaner aesthetic and usability.

To open/decipher the results file in Excel:

1. Open Microsoft Excel
2. Beneath you recent files, you will see a link to 'Open Other Workbooks'.

3. Click this link, then click 'Browse'. Navigate to the downloads folder on your PC and sort by date to locate the recently downloaded results file.
4. Select the file, then click 'Open'. This will open the Text Import Wizard.
5. Ensure the file type is set to 'Delimited' then click 'Next'
6. Set the Delimeters to 'Comma' then click 'Next' then select 'Finish' on the third page of the wizard.
7. The last three columns of the Excel document will include:
    a. Import Status – which rows were imported successfully or those that failed
    b. ItemId – Id number of the item that was created in DCI
    c. ImportReason – reason(s) why the row failed

Re-Import Process

Permissions/Roles Needed: Import Admin Permission

To re-import a file:

1. Reopen the original .txt file that you created
2. Remove the successfully imported rows and fix the errors in the rows that failed.
    a. If there was more than one reason the row failed you must fix data in all columns that yielded a failed import outcome.
3. Login to a profile with the appropriate role and/or permission via the DCI website
4. From the header choose 'Import'
5. Hover over the category of import you would like to initiate, then select the specific import function from the fly out menu
6. Select 'Actions' then 'Upload File'
7. Click 'Upload tab delimited TXT file' and find the file you wish to upload on your hard drive
8. Select 'Save' then click 'Yes' on the confirmation window
    a. The import will run as a background process. You will receive a notification with the status and results (including successful and failed import rows) which we will cover in the next section.
    b. If you set up the import file incorrectly the system will alert you that there are missing columns that need to be added before you can continue. Hover over the information icon to the right of the missing file text to determine which columns need to be added for a successful import.
9. You will receive a second confirmation window alerting you that the import process has started. Click 'Ok'.

Mass Approve Imported Data

Permissions/Roles Needed: Import Admin Permission

Available for:
❖ Imported Authorizations
❖ Imported Employee Entries
❖ Imported Authorization Balance Adjustments

❖ Imported Client Fees

To mass approve imported data:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. From the header choose 'Import' and ensure the 'Dashboard' tab is selected on the sidebar
3. Click 'Actions' then choose the mass approve imported data action you wish to perform from the dropdown menu. These options are listed above under 'Available for'.
4. This will initiate the process. You will receive a confirmation message informing you that the action has been completed successfully OR there were no imported records available to mass approve.
5. In the instance of the latter, verify your data import was accurate and/or completed successfully, then retry the mass approval