Quick Exports and Imports

A quick way to export or import records from a single repository is done by using the export
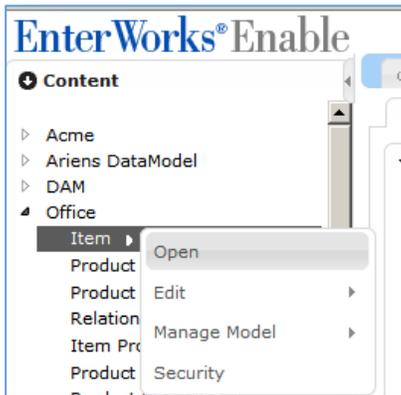
 and/or import buttons as shown below. The export option is shown first because an easy way to import records is to create an Excel file using the export function, and then using that spreadsheet for importing (to add or modify records).

Quick Export

1. Open the repository you want to export records from on the left feature bar.


2. Select the records you want to export from the repository list by selecting the checkbox next to the record(s).
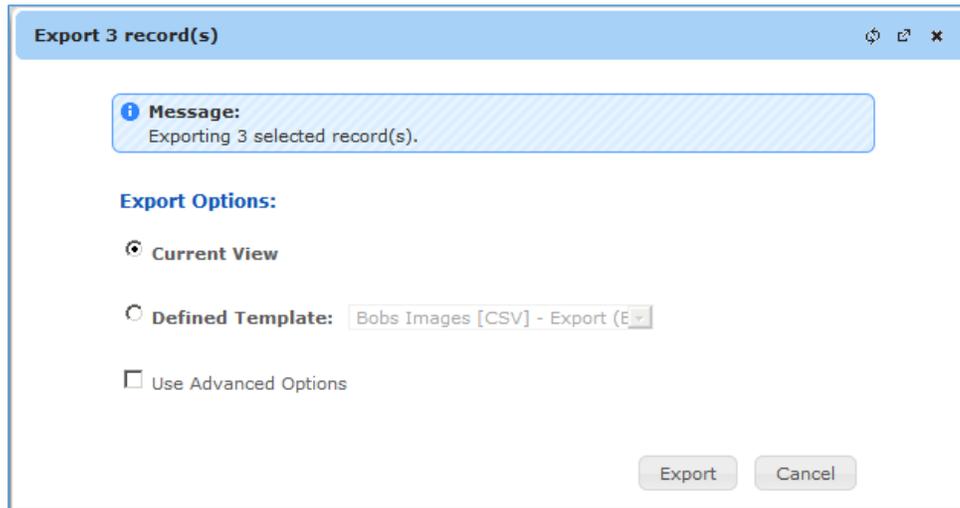
3. Select the Preference view from the **Preferences:** drop-down list on the top right that shows the fields you want to export. Create a new Preference view if needed. See section **9 – Using Repository Preference Views** for details.
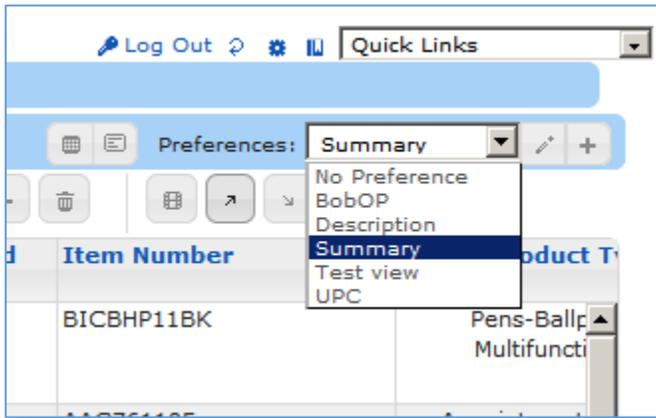
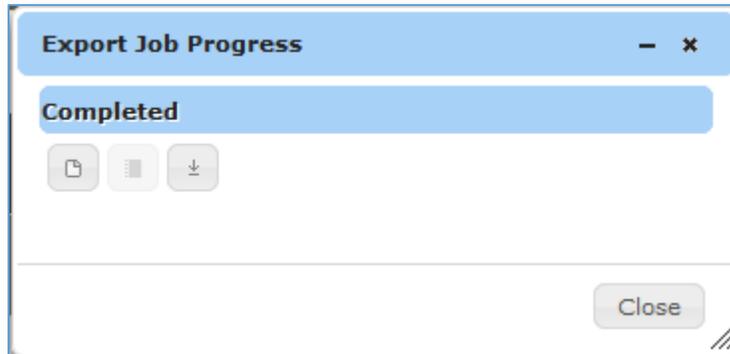4. Click the Export button on the toolbar to export the selected records.
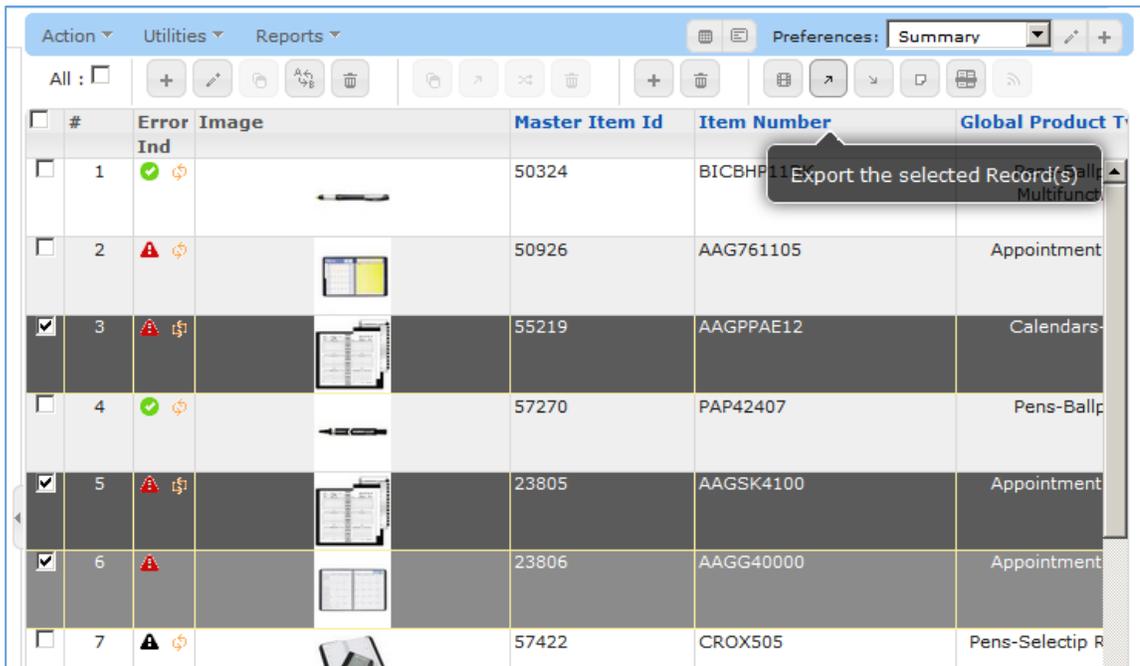
5. The Export window is shown.
6. Click the Export button.

 a. Optionally, a defined Export Template can be used (see section **17 – Export Templates Function** for details on creating or modifying export templates).

7. A Job Progress widow is shown.

8. When the job progress status shows **Completed**, click the **Download Output File** [↓] button.

9. Save or Open file.

10. The records will be exported in Excel format as shown below with the fields that were defined on the Preferences view.

|	A	B	C	D	E	F	G	H	I
1	Master Item Id	Item Number	Global Product Type	Taxonomy	Brand	Item Description	Green indicator	Sellable Item	Item Status
2	55219	AAGPPAE12	Calendars-Wall	Calendars	AT-A-GLANCE®	DISPLAY,WALL CAL,ERASBLE	Y		InProgress
3	23805	AAGSK4100	Appointment Books	Appointment Books	DayMinder®	BOOK,APT,WKLY,8X5,BK	Y		InProgress
4	23806	AAGG40000	Appointment Books	Appointment Books	DayMinder® Premiere®	BOOK,APT,MLY,8.75X6.9,BK	Y		
5									

Quick Import

To quickly import modifications or additions to a repository, use the export spreadsheet generated in the section above and modify or add records to it. Save it somewhere on your hard drive so you can easily find it again and then following the following import steps.

1. Open the repository you want to import records into from the left feature bar.
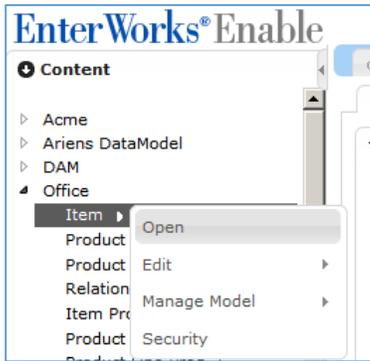
2. Click the **Import** ⬖ button on the right section of the toolbar.
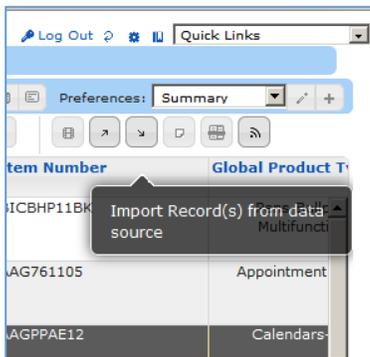
3. Click the **Next** button.

a. Optionally, a defined Import Template can be selected (see section **19 – Import Templates Function** for details on creating or modifying import templates).
b. Optionally, create a Saved Set containing the imported records.
c. Optionally, select the Pending Content Changes radio button to enter changes that take effect in the future (See section 23 – Using Future Transactions for more details).

4. The Setup Import screen is shown.

5. Browse to the import file (this is where you can select the modified export file that you created in the last section).
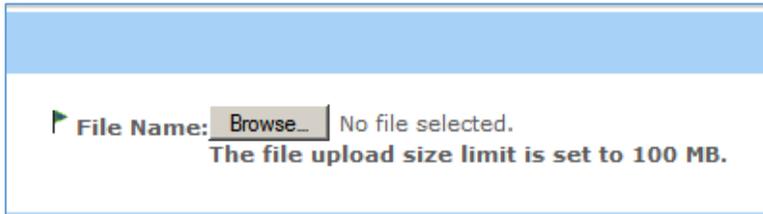
6. Change the import file Options, as desired.
    a. **File Format** – This option will be selected automatically based on the file that is selected above.
    b. **File Encoding** – Leave as DEFAULT unless the data does not import correctly, then see your Systems Administrator for the correct option.
    c. **Language** – Select the language for your export (for multi-language attributes).
    d. **Save Records Imported from Source as Set** – This option will create a Saved Set consisting of all records that have been imported.
    e. **Send above Saved Set to Workflow** – Set this checkbox if you want to send the records into your workflow. It is just like editing each record and clicking the **Save & Send** button.
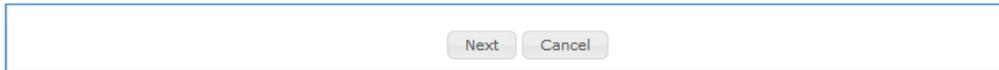   f. **Save Records in Repository but not Imported from Source as Set** – This option will create a Saved Set of all records that were not affected by the import within the repository. This is used when updating all records within a repository, in order to identify any records that were not updated.
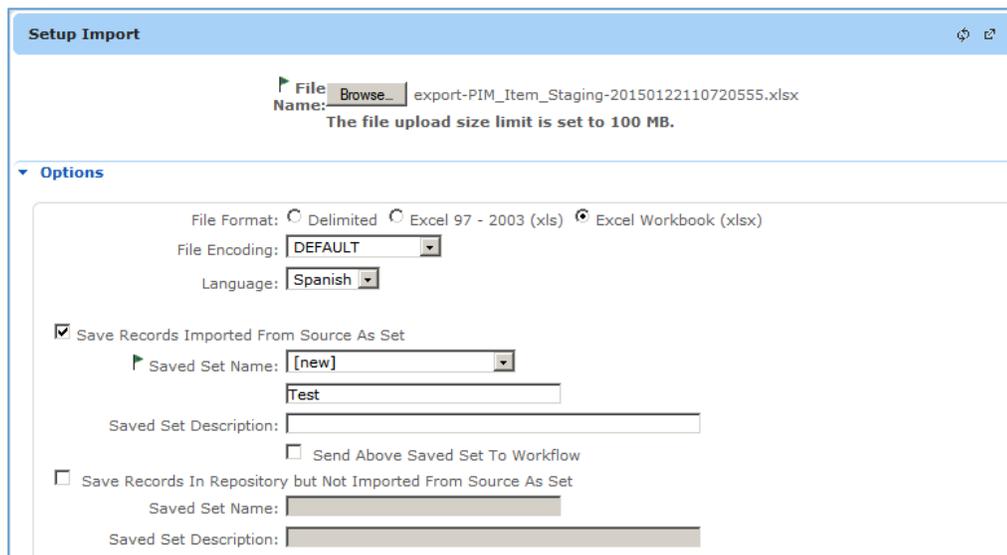
7. Click the **Next** button on the bottom of the screen.

| Next | Cancel |

8. Verify the field mappings. If the export file format used in the last section is used here and the column names were not changed, all fields should map automatically. If not, you can select the correct field from the **Repository Attribute** drop-down list.
9. **Map across all taxonomies** checkbox - If a field in the input file is a Category Attribute, use this checkbox to have the Category Attributes map automatically and/or show in the drop-down list for manual mapping. Category Attributes don't show in the mapping list automatically because it could make the selection list very large.
10. **Select Taxonomy Node** button **-** If all Category Attributes in the input file are associated with one taxonomy node, the Taxonomy node can be selected and only those Category Attributes will be shown for selection mapping. This is particularly useful for implementations with large numbers of Category Attributes.
11. **Alternative Primary Key Indicator -** Check the field in this column that you want to match the record on, if you only want to use the Primary Key check the (Primary Key 1) field, as shown below.
12. **Update all records on partial key matching** – This checkbox is used to update multiple records based on a partial key. This option should be used with care because one record in the input file could update multiple records in the database. It is recommended that you contact your Systems Administrator before using this option.

Map Column Names to Attributes   ⟳ ⤢ ✖

Taxonomy Name:Taxonomy
Taxonomy Node:☐ Map across all taxonomies

[   ]   Select

☐ Update all records on partial key matching

Preview File

Column Position	Column Name	Repository Attribute	Alternative Primary Key Indicator
1	Master Item Id	Master Item Id ** (Primary Key 1) ▾	☑
2	Item Number	Item Number ▾	☐
3	Global Product Type	Global Product Type ▾	☐
4	Taxonomy	Taxonomy ▾	☐
5	Brand	Brand ▾	☐
6	Item Description	Item Description ▾	☐
7	Green indicator	Green indicator ▾	☐
8	Sellable Item	Sellable Item ▾	☐
9	Item Status	Item Status ▾	☐

Preview File

| Back | Finish | Cancel | Clear |

13. Click the Preview File button to see the mappings against the file (optional).

Preview File - export-PIM_Item_Staging-20150122110720555.xlsx

Sequence	Item Number	Global Product Type	Taxonomy	Brand	Product Description	Green indicator	Sellable Item	Review Status
1	2	3	4	5	6	7	8	9
Master Item Id	Item Number	Global Product Type	Taxonomy	Brand	Item Description	Green indicator	Sellable Item	Item Status
55219	AAGPPAE12	Calendars-Wall	Calendars	AT-A-GLANCE�	DISPLAY,WALL CAL,ERASBLE	N		InProgress
23805	AAGSK4100	Appointment Books	Appointment Books	DayMinder�	BOOK,APT,WKLY,8X5,BK	N		InProgress
23806	AAGG40000	Appointment Books	Appointment Books	DayMinder� Premiere�	BOOK,APT,MLY,8.75X6.9,BK	N		

Close   Close

14. Click the **Finish** button.

Map Column Names to Attributes

Taxonomy Name:Taxonomy
Taxonomy Node:☐ Map across all taxonomies

[   ] Select

☐ Update all records on partial key matching

Preview File

Column Position	Column Name	Repository Attribute	Alternative Primary Key Indicator
1	Master Item Id	Master Item Id ** (Primary Key 1) ▼	☐
2	Item Number	Item Number ▼	☐
3	Global Product Type	Global Product Type ▼	☐
4	Taxonomy	Taxonomy ▼	☐
5	Brand	Brand ▼	☐
6	Item Description	Item Description ▼	☐
7	Green indicator	Green indicator ▼	☐
8	Sellable Item	Sellable Item ▼	☐
9	Item Status	Item Status ▼	☐

Preview File

Back   Finish   Cancel   Clear

11. A Job Progress widow is shown.

Import Job Progress   — ✕

Completed

[📄] [🗑] [⬇]

Download Log File

Close

12. When the job progress status shows **Completed**, click the **Download Log File** ⤓ button to see the job details (optional).

13. If a Saved Set was created, click the **Refresh** ⟳ button on the repository tab to reload the Saved Sets list (as shown below on the **Item** tab).
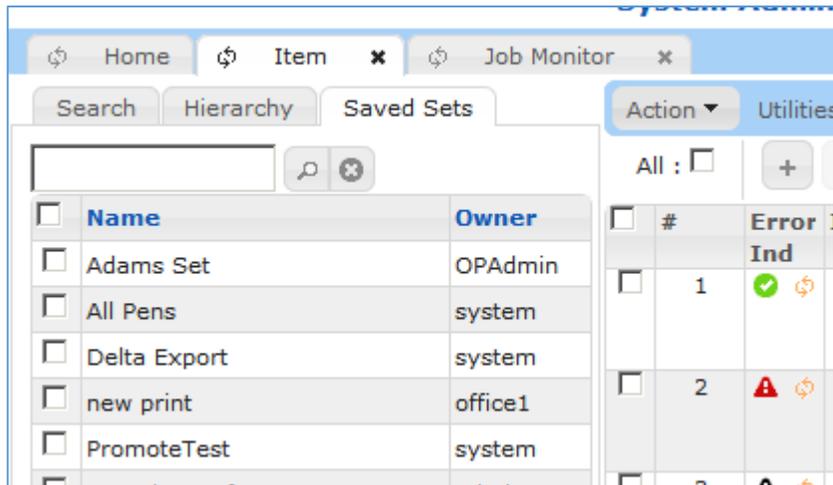
14. Click on the Saved Sets tab after the refresh.
15. Click on the Saved Set that was created to see the added or modified records listed on the right.