**A WA R E M A N A G E R**

Import Window

Importing data is the most efficient way to input information already represented in an electronic spreadsheet. This may be preferable to direct entry in AwareManager if you want to utilize Excel's capabilities to auto-format values (e.g. create a Code as a combination of other values input).

The Import window for a capsule can be accessed by right-clicking on that capsule from the Console and selecting the **Import** option. Note this option will only be available for standard capsules (i.e. capsules that allow you to store multiple records).
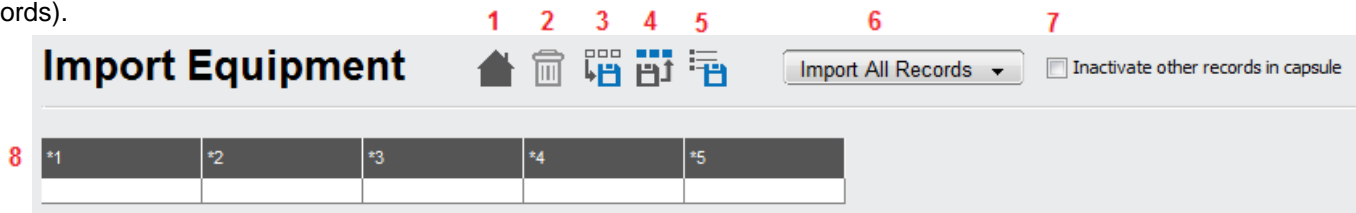
1. **Console:** Return to Console.

2. **Delete:** Select one or more rows in the import list and press this icon to remove them from the import.

3. **Store Columns:** Allows you to define a name for the specific combination of capsule/fields (in that specific order) for future imports. All columns must be defined in order to store the columns.

4. **Restore Columns:** Select this option if you are importing data that you have already stored as an import (**Store Columns**). If there is only one import stored, and the capsule/number of columns matches that import, it will default the column titles accordingly. If more than one import is stored, the user will have the option to select the desired import.

5. **Finish Import:** Uploads the data into the system. This can only be run once all columns are defined

6. **Import Options:** You can select from the following options when importing records:

   o *Import All Records*: Imports new records into the capsule if there is no match against the unique identifier (typically Code) provided, and updates existing records otherwise

   o *Import New Records*: Imports each row as a new record in the selected capsule

   o *Import Changed Records*: Updates existing records in the selected capsule with the data provided. In this case, a unique identifier for the record (e.g. Code) must be included in each row so the system knows which record to find for updating.

7. **Inactivate other records in capsule:** If selected, all other records in the capsule not included in the import will have their *Inactive* checkbox selected at the completion of the import.

8. **Column Titles:** Right-click on each column title and select one of the following options:

   o *Define Column*: Select the field corresponding to the current column. The system will check that the values are in the correct format for the field selected, and display an error otherwise.

   o *Remove Column*: Removes the column from the import. When importing new records, you can't remove a column corresponding to a mandatory value (the system will not let you complete the import).

Importing New Records

You have the option to import data from a spreadsheet into any standard capsule in AwareManager via the Console. The data can be imported into the header record of the capsule. This includes all standard/custom fields, but no detail lines (e.g. Work Materials, Maintenance Tasks).

In Excel:

1. Enter your data in a spreadsheet, one column per field (and one spreadsheet per capsule).

   Note: You must make sure that the data is formatted correctly for the corresponding field, and:
   - Does not exceed the maximum character length.

   - Is in the correct format (Number 0DP, Date, Time, Text).

   Use the "Format Cells" function in Excel to ensure columns are formatted correctly:

   - Date must be in format YYYY-MM-DD.

   - Time must be in format HH:MM.

   - If it is a linked field, the linked value is a valid Code.

2. Typically you will save the file in .xls or .xlsm format. When you are ready to import the data, go to **File > Save As** and save a copy in .txt (Text, tab delimited) format.

3. Close the file. Press **OK** for any prompts that appear.

In AwareManager:

4. From the Console, right-click on the capsule you want to import into (e.g. **Equipment**) and select **Import.**

5. Select the text file saved in **Step 2.**

6. From the **Import Equipment** window, note if the first row is a title row. If so, click on it to highlight it and press Delete (🗑) to remove it. If you still need the titles for reference, you should open up the .xls version of the file.

7. Right-click on each column title and select **Define Column**. Select the field the column corresponds to. If you instead have an import format stored for this particular spreadsheet, press Restore Columns ( ) and select from the list. If you only have one format stored, it will automatically default to this one (see **Storing Columns** below for more details).

8. Once all of the columns have been defined, make sure **Import All Records** is selected from the drop-down at the top. Then press **Finish Import** ( ). You will be prompted when the import is complete/

9. Press **OK** and close out of the window to return to the Console.

Importing Detail Records

If you want to import detail lines against existing records (e.g. Equipment Fields against Equipment records), you must use the features from the Tools menu.

1. Format your data in the spreadsheet, making sure for each detail line you reference the main record's marker (Code + Division). This is to be imported as the **ParentMarker** column. Save the spreadsheet as a .txt file.

2. From the Console, go to **Administration→Tools→Import Detail Records.**

3. Select the capsule and detail line you want to import into from the list, and then select the file saved in **Step 1**.

4. Repeat **Steps 6-9** from above to complete the import.

Storing Columns

If you anticipate doing multiple imports into the same capsule/exact same fields (i.e. using the same template spreadsheet multiple times), you may want to store your import moving forward. This eliminates the need to redefine all the columns each time you do the import.

1. From the Import window, right-click on each column title and select **Define Column**. Select the field the column corresponds to.

2. Once you have all fields defined, select **Store Columns** ( ) and define a name for your import.

3. Continue the import process as outlined in **Steps 8-9** above.

4. The next time you are importing from the same template, load the file and press **Restore Columns** ( ) and select from the list. If you only have one format stored, it will automatically default to this one.

Import Troubleshooting

Following is a list of common import issues and their resolutions:

Do not want to import a column displayed in the Import window	Right-click on the column title and select "Remove Column"
Missing a required column	If importing new records, certain fields will be required. If you did not include these fields, you must quit out of the import. Return to your spreadsheet and add that column. Save the updated spreadsheet as a .txt file and repeat the import process
Column is in an incorrect format	You must quit out of the import. Return to your spreadsheet and adjust the format of the column in question. Save the updated spreadsheet as a .txt file and repeat the import process
Column exceeds maximum character length	You must quit out of the import. Return to your spreadsheet and adjust the character length of all values within the column in question. Save the updated spreadsheet as a .txt file and repeat the import process