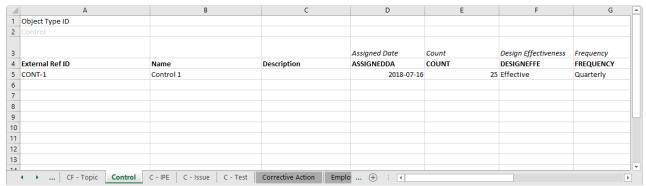


Enter New Object Data on the Import Template

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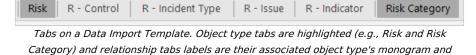
This section outlines how to create new objects using the **Data Import** feature. In Core, an Object refers to a record saved to a particular object type (i.e., the record category). For example, an Incident is an object type, while the Incident Object itself could be a Car Accident, which notes what happened on-site.



A Control import template.

To add new object type data:

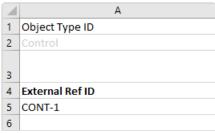
- 1. On your Data Import Template, click a highlighted object type tab (e.g., Risk) to open its related worksheet.
 - Tabs generate in alphabetical order, with relationship tabs labelled with the monogram of the object type they're saved on and their object type group (e.g., R -Control).
 - You'll learn more about relationship objects in Enter Relationship Data on the Data Import Spreadsheet.



object type group.



- An object type's fields are where users will input data. Fields can be in text or numeric forms, a date and time picker, or take the form of select (i.e., dropdown) lists. They also allow for attachment and image uploads. Read more here: Fields.
- As you put information across the Data Import Template, follow the column fields (not the row fields). Field columns begin at column D and are labelled in row 3 with the field's name and in row 4 as the field's Unique Name.
- i
- Core automatically modifies the field entry to show the date and/or time based on the Date (not General) Number format selected in the Excel section's settings.
- Date & Time data is imported in the Coordinated Universal Time (UTC) zone. As such, you may need to note a time (e.g., 12:00 pm) when importing a date, so the date won't be recorded one day in advance, due to a time difference. Please note that specific time data is not required for system/spreadsheet functionality.
- 2. On the spreadsheet (Row 5 Column A), below the **External Ref ID** heading, enter a name or code to identify the object in the system.
 - The External Reference ID is a required field and must:
 - Be unique from all other External Ref IDs
 - Have 300 characters or less
 - NOT contain the colon (:) character.
 - A suggested External Ref ID is the monogram with a sequential number (e.g., 1, 2, 3).



The External Ref ID column, below the Object Type ID.

3. Enter the object name on the spreadsheet (Row 5 Column B) below Name.



В	С
Name	Description
Control 1	

The Name and Description columns. An object description is optional.

- 4. **Optional:** Enter an object description (Row 5, Column C) below **Description**.
- 5. To enter data into a field linked to the object type, input the relevant information in the related Excel column (e.g., enter the External Ref ID under the Object Type ID).
 - a. Text: Enter the data as needed.
 - b. Numeric: Enter numbers only.
 - c. Date & Time: Enter a date and/or time.
 - d. Select List: Choose an option (e.g., Incident Severity) from the select list in Core, which is not case-sensitive on data imports. However, all other characters entered into the spreadsheet must match the option exactly.
 - e. Multi-Select List: Enter one or more of the options from the select list, separated by commas, with no spaces (e.g., high,medium,low). Multi-select list options are not case-sensitive on data imports. However, all other characters entered into the spreadsheet must match the option(s) exactly.
 - f. Attachment: Enter the expected path and file name (e.g., Reports/October 2 break in.jpg), for any imported files in the appropriate attachment field column in the spreadsheet. Read more here: Import File Attachments.

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Assigned Date	Automated Control	Count	Design Effectiveness
ASSIGNEDDA	AUTOMATEDC	COUNT	DESIGNEFFE
January 18, 2018		5	Effective

Entering data to import into the object's fields.

- 6. To assign users from a specific role to the object:
 - a. Make sure all relevant users have been added to Core and to the related role (otherwise your data import will fail).
 - b. Locate a role column in the spreadsheet. Role columns appear after field columns and are labelled in row 3 as **Assignable Role** and in row 4 as the Role's name (e.g., Owner).

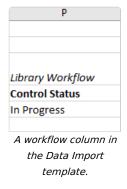


- c. Enter the user's company email address in a section below the desired column (e.g., Column N). If you're assigning multiple users, separate the users' email addresses by commas (e.g., lucian.ford2653@coreqe.com, somchai.tan_2653@coreqe.com).
- d. Under the column Assignable Role (e.g., Columns N or O below), enter the relevant users' email addresses.
- e. Continue assigning users to other roles, if any.

N	0	P	Q		
Assignable Role	Assignable Role				
Owner	Reviewer				
user1@example.com	user1@example.com,user2@example.com				

Role columns in the template.

- 7. To assign a workflow state to the object:
 - a. Locate a Workflow column in the spreadsheet to the right of any Role columns.
 - b. Enter the state's name (e.g., In Progress) as in the workflow (e.g., Control Status) below the Library Workflow column (e.g., Column P).



- c. Repeat the steps above to continue adding data (as needed) on the worksheet.
- d. To import data on a different object type (e.g., Control), select the relevant worksheet.



If you do not wish to add data to another field, role, or workflow, leave the sections below the respective columns blank (do NOT delete, as it will cause upload errors).

8. Save your changes.