

Enter New Object Data on the Import Template

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Overview

This article outlines how to create new objects using the **Data Import** feature. In Resolver, 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.

User Account Requirements

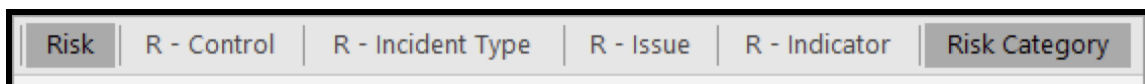
The user account you use to log into Resolver must have Administrator permission to access the Data Import feature.

Related Information/Setup

Please refer to the [Data Import](#) section for more information on the Data Import feature.

Adding New Object Data on the Import Template

1. On the Data Import template, click a highlighted object type tab (e.g., Risk) to open its related worksheet.



Tabs on a Data Import Template

- 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)
- 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: [Field](#).
- As you enter information into 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.
- Resolver 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.



Note:

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).

	A
1	Object Type ID
2	Control
3	
4	External Ref ID
5	CONT-1
6	

An Example External Ref ID

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

B	C
Name	Description
Control 1	

Name and Description Columns

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).

- **Text:** Enter the data as needed.
 - **Numeric:** Enter numbers only.
 - **Date & Time:** Enter a date and/or time.
 - **Select List:** Choose an option (e.g., Incident Severity) from the select list in Resolver, which is not case-sensitive on data imports. However, all other characters entered into the spreadsheet must match the option exactly.
 - **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.
6. **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](#).

D	E	F	G
<i>Assigned Date</i>	<i>Automated Control</i>	<i>Count</i>	<i>Design Effectiveness</i>
ASSIGNEDDA	AUTOMATEDC	COUNT	DESIGNEFFE
January 18, 2018		5	Effective

Related Excel Columns

7. To assign users from a specific **role** to the object:
- Make sure all relevant **users** have been added to Resolver and to the related **role** (otherwise your data import will fail).
 - 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).
 - 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).
 - Under the column Assignable Role (e.g., Columns N or O below), enter the relevant users' email addresses.
 - Continue assigning users to other roles, if any.

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

Role Columns

8. 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.



Warning:

If you don't want to add data to another field, role, or workflow, leave the sections below the columns blank.

9. Save your changes.