

Uploading the Data Import Template

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Overview

Before uploading the data import, you must ensure you've generated the **Data Import Template** and correctly entered the object and relationship data on the right worksheets.

When you have input the required information on your **Data Import Template**, you'll be ready to upload that Excel spreadsheet with your company's library data into Resolver, where it will become a single source of truth for your organization and team.



Note:

An RTF (Rich Text Field) field will not be formatted when an object with an RTF field is created through the data import (.csv).

User Account Requirements

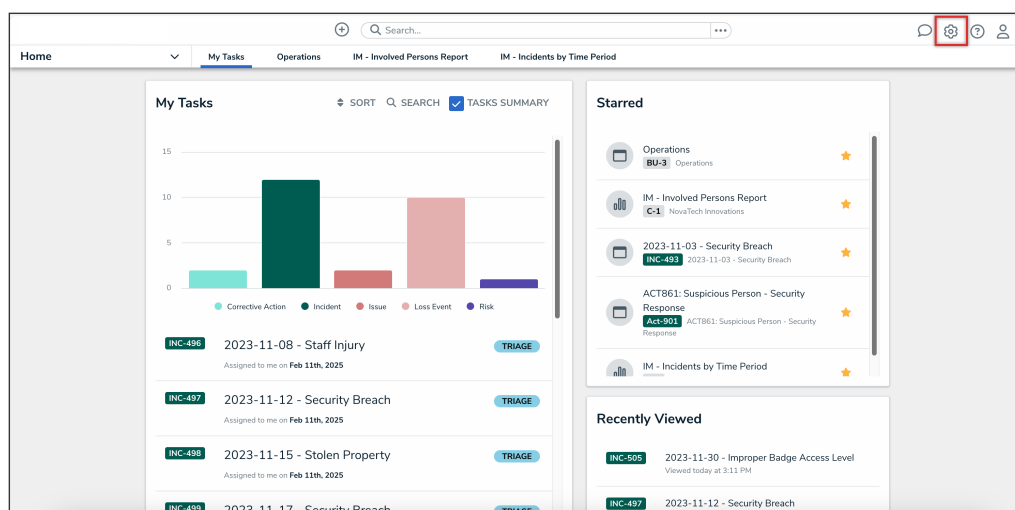
The user account you use to log into Resolver must have Administrator permission to access the **Data Import** feature.

Related Information/Setup

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

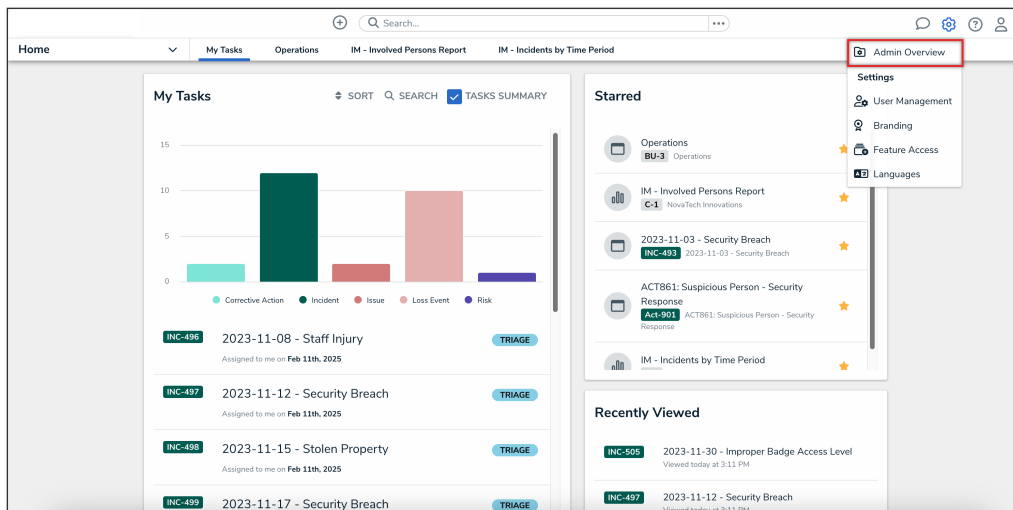
Navigation

1. From the **Home** screen, click the **Administration** icon.



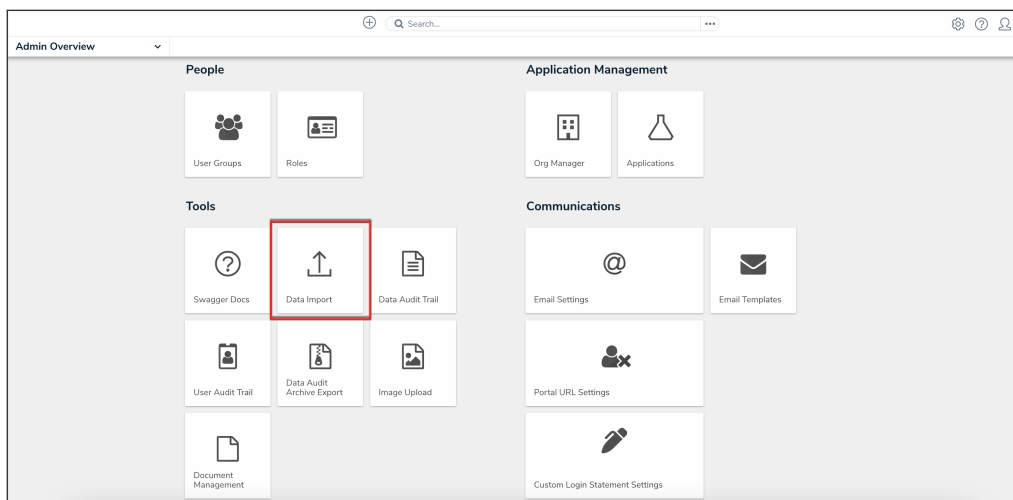
Administration Icon

- From the **Administrator Settings** menu, click the **Admin Overview** link.



Administration Icon

- From the **Admin Overview** screen, click the **Data Import** tile under the **Tools** section.



Data Import Tile

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- From the **Data Import** screen, from the **Identifier type** dropdown menu, select either:
 - Object Type External Reference ID:** If you've entered the external reference object type IDs and/or the external reference relationship type IDs on the spreadsheet.
 - Object ID:** If you've entered the object type IDs and/or relationship IDs on the spreadsheet.

The screenshot shows the 'Data Import' section of the Resolver application. At the top, there is a navigation bar with 'Tools' selected. Below it, the 'Data Import' tab is active. The main area contains a file upload instruction: 'Drag and drop (or browse for) a Core-configured Excel data import file.' Below this is a dashed box for the file. A note states: 'One file can be uploaded at a time. Date field values will be imported in UTC timezone'. There are two checkboxes: 'Defer processing of formula recalculations' and 'Verify file only'. The 'Identifier type' dropdown menu is highlighted with a red box and shows 'Object Type External Reference ID' as the selected option. A small note at the bottom says: 'The importer supports using Object Type External Reference IDs or Object Type IDs'.

Identifier Type Dropdown

2. **(Optional):** Click the **Defer processing of formula recalculations** checkbox to postpone formula and permission recalculations when the **Data Import Template** file uploads.

This screenshot is similar to the previous one, but the 'Defer processing of formula recalculations' checkbox is now highlighted with a red box. The 'Identifier type' dropdown remains set to 'Object Type External Reference ID'.

Defer Processing of Formula Recalculations Checkbox



Note:

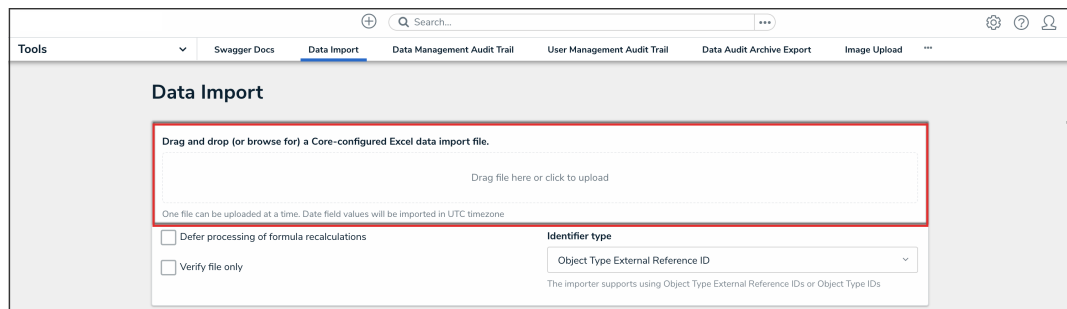
Depending on the relationships and formulas' complexity, deferrals should usually be enabled for imports with more than 50,000 objects, as it will speed up the data import process. For further help contact [Resolver Support](#).

3. Before uploading the file, click the **Verify file only** checkbox to check the data was entered correctly.

This screenshot shows the 'Data Import' section with the 'Verify file only' checkbox highlighted by a red box. The other settings, including the 'Defer processing of formula recalculations' checkbox and the 'Identifier type' dropdown, remain the same as in the previous screenshots.

Verify File Only Checkbox

- The **Verify File Only** checkbox will perform a test import without altering your data. It shows you any existing **Data Import Template** errors and what specific fields they're occurring on. This practice will help reduce any possible confusion and you having to review your spreadsheet line by line if errors are reported.
4. If there are no file errors detected, drag and drop the file to the upload area or click the area to find and open the file for upload.

The screenshot shows the 'Data Import' section of the Resolver application. At the top, there's a navigation bar with tabs: 'Tools', 'Swagger Docs', 'Data Import' (selected), 'Data Management Audit Trail', 'User Management Audit Trail', 'Data Audit Archive Export', and 'Image Upload'. Below the navigation bar, the 'Data Import' section is titled. It contains a large rectangular area with a red border, intended for dragging and dropping a file. Inside this area, the text says 'Drag and drop (or browse for) a Core-configured Excel data import file.' and 'Drag file here or click to upload'. Below this area, there are two checkboxes: 'Defer processing of formula recalculations' and 'Verify file only'. To the right of these checkboxes is a dropdown menu labeled 'Identifier type' with 'Object Type External Reference ID' selected. Below the dropdown, a small note states: 'The importer supports using Object Type External Reference IDs or Object Type IDs'.

Data Import Upload Area



Note:

Ensure the **Verify File Only** checkbox is de-selected before uploading.

5. If needed, correct any errors on the spreadsheet, save your changes, then re-upload the file.
6. When an import is successful, a confirmation message will display. This means that your library data is now uploaded into the Resolver and is ready to be used for recording, tracking, reporting, and managing your company's information.
- An **Import Summary** will be included at the end of the message, providing counts for the import, including total objects processed, new objects created, updated objects, attachments, roles assigned, and relationships created.
 - The message will also indicate if any rows were skipped on any worksheets within the file due to missing external reference IDs. If there are multiple worksheets within the import file, a message will be displayed for each sheet with skipped rows. The message will indicate the number of skipped rows and the name of the worksheet where they are skipped. Imports can then be corrected and attempted again to ensure all data is imported correctly.

Import Completed Successfully

- Data Template.xlsx
- 1 rows were skipped on Activity due to missing external reference IDs

Import Summary

Total Objects Processed: 2
New Objects: 0
Updated Objects: 2
Attachments: 0
Role Assignments: 0
Relationships: 0

Successful Data Import Message

- If you're importing a large amount of data or data that includes role assignments, the import process may not complete immediately, depending on the:
 - Amount of data
 - Complexity of the role's permissions
 - Number of roles assigned. In this case, a message displays when the import is in progress and when it's completed