Resource Importer Walkthrough - Step 4

Importing Resources

Step 4: Edit data as needed

As you may have noticed in Step 3, with this example we have a couple of columns that don't quite match up to the Section Grid. The "Title" column in the .csv data is an additional column we are not tracking in our Section. Also, although we have a "First Name" and "Last Name", we are missing a data column for the top-level "Name" required in the Section Grid.

Common Editing Questions:

- What if I have too many / too few columns in my .csv to match the Section Grid?
- What if I see a typo in the .csv data?
- What if just my column headers are in the wrong place?

To Hide Extraneous Column Information:

Right click on a header and deselect the check box for the column you wish to hide. In this case, we want to hide "Title".


To Edit Data in the Resource Importer

Data in the grids can be edited directly by clicking on the cell(s). In our example, we can see that "Amanda Kingson" should really be "Amanda Kingston". Let's fix that! Click in the cell, type in the edit you wish to make, and then click outside of the cell to exit edit mode. To edit a full row of data, you can right click on the row, select "Edit" row, and make multiple changes in the form box.

If a column header is over the wrong data:

If just the header is in the wrong spot (doesn't match the data below it), you can move just the column header in the Resource Importer, without moving the data below it.

1) Right click on a row of the grid to edit and select "Set Columns":
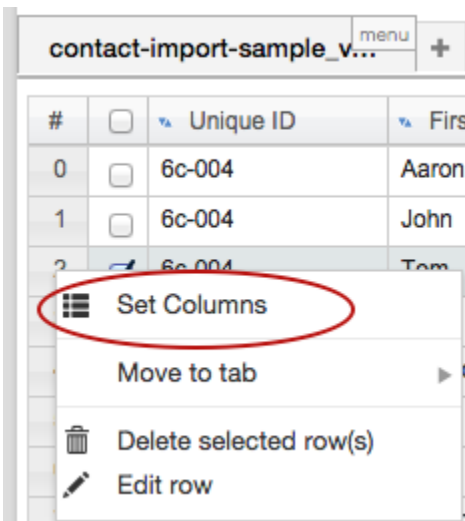
2) In the "Change Column Header" dialog box, drag and drop the column header(s) into the desired order. Remember, this only moves the headers, not the data below them! Then, hit "OK".

Change Column Header

#
<input type='checkbox'>
Unique ID
First Name
Last Name
Title
email
email2
Phone
Phone Cell
Phone 2
TimeZone
Role

OK Cancel

If your .csv data is missing a data column needed for the Section grid:

In our case, the .csv data is missing the required "Name" column for the Section grid. Think of the "Name" as the information you would want to search for in Provision. We wouldn't want to search just for "Bob" or "Smith" when looking down a list of names, so under the "Name" column, we need to see the full first and last names, like "Bob Smith".

Currently, our options to fix this are:

1) Edit the .csv directly in your spreadsheet program: (Recommended) Simply revise the .csv to include another column for "Name", and re-open the .csv in the importer. The benefit to this method is your .csv file will be set up as a template for future imports.

Or:

2) In the Resource Importer, temporarily hide the extra column in the Section Grid: Make the columns between the .csv and the Section Grid match exactly by temporarily hiding the column (in this case, "Name") in the Section Grid, proceed to move the data into the Section grid (see Step 5), then unhide the "Name" column and manually add the data as needed prior to completing the import.

#	▾ Name (required)	▾ Custom ID ▴	▴ First Name	▾ Last Name	▾ Email	▾ 2nd Email	▾ Phone	▾
0	Aaron Hughes	6c-004	Aaron	Hughes	aaron@6c...	support@...	1-408-555...	1-4
1	Amanda Kingston	6c-015	Amanda	Kingston	akingston...		44 123 55...	
2	Bob Smith	6c-007	Bob	Smith	bsmith@a...		888-call-now	
3	Herold Waters	6c-011	Herold	Waters	hwaters@i...		234-555-6...	
4	Jill Keller	6c-013	Jll	Keller	jill.keller@...		17 145 12...	
5	John Parker	6c-004	John	Parker	john@gm...		234.634.1...	
6	Mark Tompson	6c-010	Mark	Tompson	tompson...		888-nice-...	
7		6c-008	Maurice	Carmichael	mc@mail....		866-555-1...	
8		6c-012	Michael	Sanders	pm@myb...		354-555-1...	
9		6c-014	Sarah	Campbell	sa.camp...		234-234 1...	
10		6c-004	Tom	Taylor	ttaylor@to...		503-555-1...	
11		6c-009	Vince	Bunch	vbunch@...	ops@hap...	703-555-1...	

When edits and adjustments are complete, move to Step 5 - Drag rows to the Section Grid