

Resource Import from CSV

Simple Upload / Import from CSV

The [Simple Upload / Import from CSV](#) tool is used if you have a simple .csv file with customer / contact information, such as Name, Address, Billing Address, Phone numbers, POC, etc. It is accessed from the [Data Import Tab](#) from the [Admin](#) section of ProVision.

Information on preparing data for import and using each import tool is available at <https://docs.6connect.com/display/DOC/Importing+Your+Data>.

Sample import templates are available [here](#).

<p>Resource Import:</p> <ul style="list-style-type: none">Simple Upload/Import from CSVResource Import Tool "Beta" <p>IP Import:</p> <ul style="list-style-type: none">Upload/Import from CSVImport from RIR <p>Peering Import</p> <ul style="list-style-type: none">Import BGP Sessions	<p>DNS Import:</p> <ul style="list-style-type: none">BIND Zone Upload/ImportPowerDNS Zone ImportInfoBlox Zone ImportNS One Zone ImportDyn DNS Zone ImportDNSMadeEasy Zone ImportIPPlan Zone Import
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To import your customer / contact information, follow the following steps:

- [Before you Begin: Prepare your Data for Import](#)
- [Step 1: Create a new Resource / Customer Import Job](#)
- [Step 2: Define Columns](#)
- [Step 3: Reviewing Data](#)
- [Additional Information](#)

Before you Begin: Prepare your Data for Import

The [Simple Upload / Import from CSV](#) tool requires only a .csv file for importing.

Be sure to review "[Preparing Data for Import](#)" on the [Importing your Data](#) page before you begin. Verify that your .csv is correctly parsed and cleanly formatted with your customer/contact information (using your choice of the available field list shown below), and is UTF-8 encoded for best results.

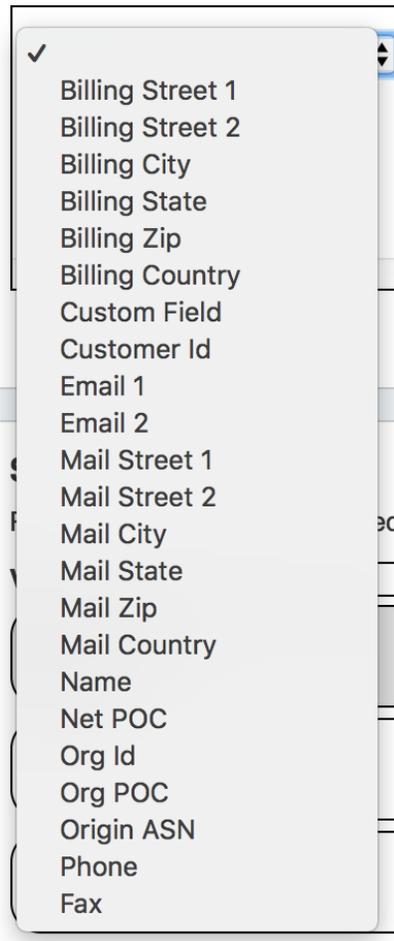
Be sure to check that your data is cleaned up with the following steps:

- Remove any empty rows in the data range
- Remove any empty columns in the data range
- Remove stray data from inside and outside the data range, such as:
 - notes, comments, and placeholder text as field values, when not set as their own data column
 - nested secondary information located in additional rows under a primary record
- Ensure proper data formatting
 - Check for data formatting errors - a common issue is leading zeros being dropped from a ZIP field when a file is opened. Re-specify format as needed.
 - Ensure each field has consistent formatting for values
- Ensure unique values for primary identifiers, such as Resource Name and ID Fields

Data Encoding Format

To ensure correct importing of any special characters, make sure to use UTF-8 encoding for your CSV file!

This Resource Import from .csv tool supports the following fields:



Note: the following fields are REQUIRED:

- Name (Unique Resource / Customer Name)
- Customer ID (Unique non-name identifier)

All other fields are optional.

Step 1: Create a new Resource / Customer Import Job

Navigate to the **Data Import** Tab from the **Admin** button. Select "Simple Upload / Import from CSV" under "Resource Import".

Information on preparing data for import and using each import tool is available at <https://docs.6connect.com/display/DOC/Importing+Your+Data>.

Sample import templates are available [here](#).

Resource Import: Simple Upload/Import from CSV Resource Import Tool *Beta*	DNS Import: BIND Zone Upload/Import PowerDNS Zone Import InfoBlox Zone Import NS One Zone Import Dyn DNS Zone Import DNSMadeEasy Zone Import IPPlan Zone Import
IP Import: Upload/Import from CSV Import from RIR	
Peering Import Import BGP Sessions	

Create a Job Name and Description for the import. This is especially useful to keep track of progress in cases the data arrives from multiple sources, or will require multiple stages of manual review.

Select the .csv file that you prepared above by selecting the "Choose File" button, and browsing to the correct file location. Then hit "Start Import".

Step 1: New Import
The Customer Import accepts CSV files in a variety of configurations and formats. For an example file, [click here](#). Please make sure all data files are encoded with UTF-8 for best results.

Job Name: → Description:

customer-import-test1.csv

File must be in CSV Format.

Working with Large or Multiple Data Sets

Although you cannot add new files to an existing job, for jobs with multiple sources for data (which may have different formatting), you can simply create separate jobs and descriptions for each source - no need to manually combine the data into one file before importing. The Import tool's mapping and editing functions will allow for the data to be reconciled in ProVision.

For large data sets where multiple stages of manual review might be needed, you can create a new job using the same set of data files in order to work in parallel on a different portion of the data.

After importing, the new job will appear under the "Existing Jobs" section.

To continue working with this job, select it from the list (by clicking on the link) and the next step ("Define Columns") will appear at the bottom of the page.

Existing Jobs
[Sample Customer Import last modified 13-07-2018 2:22 PM](#)

Step 1: New Import
The Customer Import accepts CSV files in a variety of configurations and formats. For an example file, [click here](#). Please make sure all data files are encoded with UTF-8 for best results.

Job Name: Description:

No file chosen

File must be in CSV Format.

Step 2: Define Columns ←

The Import process requires you to enumerate the function of the columns in the provided CSV. The 'Customer Id' field is your internal customer identification system and can be referenced elsewhere.

Unique ID	Name	Phone	Phone 2	Mail_street_1
101	Oregano	408-555-2341		55 Pizza Ave.
102	Basil	408-555-2341	408-555-1774	367 Maple Ave
103	Thyme	756-344-3241		123 State St.

Step 2: Define Columns

Using the dropdown menu above each data field, select the appropriate definition for each of the imported columns. **Phone** and **Fax** may have multiple columns associated with the data. Other columns which do not apply under the available definitions should be left as blank, and will be skipped during the upload process.

Note: the following fields are REQUIRED:

- Name (Unique Resource / Customer Name)
- Customer ID (Unique non-name identifier)

Make sure that you have defined all desired fields by using the scroll bar below your data to view additional columns.

When completed, hit "Next".

Step 2: Define Columns

The Import process requires you to enumerate the function of the columns in the provided CSV. The 'Customer Id' field is your internal customer identification system and can be referenced elsewhere.

Customer Id	Name	Phone		
Unique ID	Name	Phone		Mail_street_1
101	Oregano	408-555-2341		55 Pizza Ave.
102	Basil	408-555-2341		367 Maple Ave
103	Thyme	756-344-3241		123 State St.

Next

Dropdown menu options: Billing Street 1, Billing Street 2, Billing City, Billing State, Billing Zip, Billing Country, Custom Field, Customer Id, Email 1, Email 2, Mail Street 1, Mail Street 2, Mail City, Mail State, Mail Zip, Mail Country, Name, Net POC, Org Id, Org POC, Origin ASN, Phone, Fax.

Step 3: Reviewing Data

After supplying the file and defining columns, a review step is provided. Records with errors will show as color coded, and can be filtered to be viewed by All, Valid, Warnings, Invalid, or Ignored.

From here, the records can be edited or ignored. Select "Ignore" for records that you do not wish to import at this time. Records that are Ignored or Invalid will automatically be skipped.

Header Rows

If your .csv has a header row as the first line, that row will be shown as the first record in review data as well. Simply click "Ignore" on the first record to disregard the row.

For rows with an "Invalid" or "Warning" status, you may wish to edit the record to change information to a valid option.

Step 3: Review Data

Please review the data for correctness. Invalid and ignored rows will be skipped.

View: All Valid Warnings Invalid Ignored Hide

Name	A customer already exists with this name!	Enable
Oregano	A customer already exists with this name!	Edit Ignore
Basil		Edit Ignore
Thyme		Edit Ignore

Hitting the "Edit" button for the record provides options to change or add information for available fields.

Step 3: Review Data

Please review the data for correctness. Invalid and ignored rows will be skipped.

View:

Name A customer already exists with this name!

Name: Oregano 2

Customer Id: 101

Phone:

Email 1:

Mail Street 1: 55 Pizza Ave.

Mail City:

Mail Zip:

Billing Street 1:

Billing City:

Billing Zip:

Net POC:

Org POC:

Custom Field: 1234

Fax:

Email 2:

Mail Street 2:

Mail State:

Mail Country:

Billing Street 2:

Billing State:

Billing Country:

Org Id:

Origin ASN:

Basil

Thyme

In this example, as "Name" was the invalid field, it has been updated to a unique value. The "Custom Field" value has been added as well. After making the desired edits, hit "Save".

The data record will be re-checked for validity, and will have a white background if it is now valid for import.

Step 3: Review Data

Please review the data for correctness. Invalid and ignored rows will be skipped.

View:

Name A customer already exists with this name!

Oregano 2

Basil

Thyme

Step 4: Import Data

When you have reviewed the data import job for accuracy, hit the Execute Import button. All rows which are disabled, invalid, have warnings, or were previously successful will be passed over. Successful import rows will be marked as such.

After data has been reviewed for accuracy, you may execute the import.

Step 4: Execute Import

When the review step is completed, hit the "Execute Import" button.

Step 3: Review Data

Please review the data for correctness. Invalid and ignored rows will be skipped.

View:

Name	
	A customer already exists with this name! <input type="button" value="Enable"/>
Oregano 2	<input type="button" value="Edit"/> <input type="button" value="Ignore"/>
Basil	<input type="button" value="Edit"/> <input type="button" value="Ignore"/>
Thyme	<input type="button" value="Edit"/> <input type="button" value="Ignore"/>

Step 4: Import Data

When you have reviewed the data import job for accuracy, hit the Execute Import button. All rows which are disabled, invalid, have warnings, or were previously successful will be passed over. Successful import rows will be marked as such.

A progress bar will appear to and display the records as they are imported.

When the bar reaches 100%, and displays "Current Step: Finished!" the import is complete, and you may leave the page.

Step 4: Import Data

When you have reviewed the data import job for accuracy, hit the Execute Import button. All rows which are disabled, invalid, have warnings, or were previously successful will be passed over. Successful import rows will be marked as such.

Current Step: Finished!



Additional Information

For more import options, see:

- [Resource Import Tool](#)
- [Import Peering Sessions](#)
- [IP Import from CSV](#)
- [Import Aggregate Blocks](#)
- [Import DNS Zones](#)