



## Bulk Import and Update Issues via CSV in InfoCapture Endorsed

### Introduction

It's possible to bulk import issues into an InfoCapture project. This is useful when existing data is elsewhere and it's wished to move it to InfoCapture.

Ticket information can also be updated in bulk using a CSV.

If multiple issues need to be updated with the same information, it is more efficient to update them in bulk. This is also useful for assigning multiple issues to a particular handler or changing the status for multiple issues.

### Bulk Import

#### Download Template

To bulk import issues first download a template to populate issues with.

- Go to InfoCapture Admin > select the relevant project > click 'Export & Import from CSV' > 'Bulk Import' tab.
- Underneath "Step 1 - Download and populate template", click "Download Template". This will download a .csv with column headers, which will correspond to fields within the project form, as well as details such as reporter, handler, and date of submission. Each row of information you enter into the CSV will create a new issue within the project once the file is uploaded.
- Complete the details as required on your local PC, bearing in mind the appropriate values for that field type (for example, a "radio" field type will need to contain an ID number rather than text - check the "Field Properties" tab within the InfoCapture form to confirm).

Below is a table of the expected values based on field type:

Field Type	Expected Value in CSV	Notes
String	Plain text	
Text	Plain text	
Checkbox (Single)	0, 1	
Checkbox (Multiple)	Numerical IDs of values	Comma separated list
Radio	Numerical ID of value	
Select (Single)	Numerical ID of value	

Select (Multiple)	Numerical IDs of values	Comma separated list
Date (Calendar Picker)	YYYYMMDD	
Date (3 Drop Downs)	YYYYMMDD	
Date/Time	YYYYMMDDHHMMSS	
Label	Cannot be imported	
Notice	Cannot be imported	
Users list (Single)	User ID	
Users list (Multiple)	User IDs	Comma separated list
Document (link to a file which already exists in the Claromentis DMS)	Document ID	
File upload	Cannot be imported	
HTML	Plain text	
Group	Group IDs	Comma separated list
Role	Role IDs	Comma separated list
Signature Pad	Cannot be imported	The signature pad is securely time-stamped and cannot be imported back.
Financial	Numerical value	Financial value assumes there are two decimal places without a dot or comma separation or any currency symbols. For example, to enter the value of 150.50 this must be entered as 15050.
creator-user-id	User ID	If unspecified, the submitter will be 'Guest'.
handler-user-id	User ID	If specified, ASSIGNED TO field must be enabled in Project Properties and the relevant user must have 'Handle issues' rights If unspecified, the issue will be unassigned.
status-code	Status code	If unspecified, the status will display 'Current status'
date-of-report	YYYYMMDDHHMMSS	

## Importing Issues

Back in the InfoCapture Admin panel, select the 'Bulk Import' tab, and upload the CSV you have populated previously.

Click 'Import', and the system will start applying the data to your InfoCapture project, a summary of the imported issues will appear as well.

IMPORT STARTED		
1 row, 1 imported, 0 errors		
ID	ID in Project	Status
000457	ST0023	IMPORTED

IMPORT FINISHED

The tickets newly added should be evident when you check your project's ticket list.

## Bulk Update

To bulk update issues that already exist in an InfoCapture project, the process is similar to bulk importing.

## Download Data

- To amend and update multiple existing issues, download the existing data by going to InfoCapture Admin > select the relevant project > click 'Export & Import from CSV' > 'Bulk Update' tab.

- Underneath 'Download and modify CSV data', click 'Export all data to CSV'.

- Change the required details in the downloaded CSV. Ensure that the 'id' and 'id\_in\_project' columns are not amended, as these are unique identifiers and should be left as they are.

## Updating Issues

Back in the InfoCapture Admin panel, select the "Bulk Update" tab, and upload the updated CSV. Click "Update", and a summary of the updated issues will appear below.

## Troubleshooting

**Step 2 - Select your CSV**

Select the CSV you have just updated then click the Update button to complete

No file chosen

IMPORT STARTED

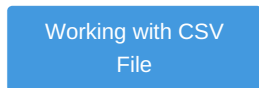
2 rows, 0 imported, 2 errors

ID	ID in Project	Status
099339	A0001	INVALID FORMAT FAILED ON: date-of-report
099342	A0002	INVALID FORMAT FAILED ON: date-of-report

IMPORT FINISHED

The most common issue with imports is the invalid format, this is mostly caused by incompatibility with character encoding or automatic data interpretation which is often caused by opening CSV files directly in applications such as Microsoft Excel.

Claromentis uses UTF-8 character encoding and there are few tips you can follow when working with CSV files following a short video below and check out the article below.



Check out our video of an import being run:

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