

Import/Export

Allows you to import and export certain fields of information in and out of the ISM.

Import Tab

Importing Data

1. Select the type of data that you want to import from the drop-down.
2. Select how the system should handle the data.
 - a. Synchronize – blends old and new data (in order to use this field, the data file you are importing must have come from ISM3)
 - b. Delete Old Add as New – will delete everything in that group before importing the new data
 - c. Add As New – used when you're importing brand-new information
3. File Format – should be Comma Separated Values; the files that are being imported from Excel must be saved in this format!
4. Once you have selected the type of data, you will have a fourth field added that you will give you a Browse button. You will use this button to browse and upload your file.
5. Once you have selected the applicable file, click on the orange Upload File button.
6. You will now indicate what type of information the columns from your file are. In other words, the ISM will show you a sample entry from each column, and you will select from the drop-down what type of field that is.
7. Once you have assigned all of the columns, you will click on the orange Process Import button at the bottom.
8. Depending on how big the file is that you're uploading, this might take a while. Once it says it is finished, it is a good idea to go check and see if your info uploaded or not.