ITEM IMPORT

An Item Import can be used to create new items, delete items, or update data for existing items. Item imports are branch specific.

Auto Build a Layout

Access the Item Import by going to **Data Files > Item Information > Item** Import.

Click on the *Export Default Layout* icon in the top left corner.

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Due to potential outside normal b	performance issues, DMSi strongly recommends runn usiness hours.	ing this process			Proce	SS

The "Fields to Include in Export" screen will open. Choose the appropriate fields you wish to include.

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Agility will export the default layout to Excel. It's very important the default layout from Agility is used because the spreadsheet is already formatted to map the columns for importing purposes.

Next, fill out the spreadsheet. The second row is the name of the field that will be updated in Agility. The third row is the corresponding table name and field in the Agility database. If you are creating a dimensional item, you will need one row to create the parent item and then additional rows for each dimension. The parent row should not have values in the thickness, length or width fields.

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Once you have finished filling out your spreadsheet, save the file to your device.

In the "Item Import" screen, click on the Default Layout icon.



In the "Build Path" screen, click the select a File icon.



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In the "Select File Containing Data to Import" screen, find the file you want to import, highlight it, then click *Open*.

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The file will pull back into the "Build Path" screen. Click **OK**.



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The default layout has now been built. To update it, double click on the "Default Layout Definition" row or click on the *Update Record* icon.

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Click *Save* and choose to "Update Existing Record". Doing this will allow the Default Layout to auto map any new imports in the future.



To confirm the fields are mapped correctly, click on the tab corresponding to the tab in "Item Maintenance" that will be updated. Review the *Field Name* and *Value*.

Use the left and right triangle icons on the right side of the import maintenance screen to see more tabs.

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Make necessary changes and *Save*. Then exit out of this screen to get back to the "Item Import" screen.

Manually Build a Layout

If you just need to update a couple of fields for your items, it would be quicker to manually create an import layout for those few fields. In the "Item Import" screen, click the *Add new record* icon.

Type the name of your layout in the *Definition* field. Then *Browse* to find the file.



Next, click the Select a file icon.

In the "Select File" screen highlight the correct file to import then click Open.

The file will pull back into the "Build Path" screen. Click OK.



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From here manually map each field in the spreadsheet. Start on the *Action* tab and specify the number of header rows.

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Next, click on the *Item* tab. Click on the drop-down arrow and choose the column in the spreadsheet that matches the field. Continue through all fields you need to map. Each tab will be updated the same way to ensure the correct information is imported.

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When you have finished manually mapping all your fields, click the *Save* icon and exit out of the screen.

Import Item File

To import a file, open the "Item Import" screen. Keep in mind imports may be branch specific. Click on the Definition ID that you want to use that matches your spreadsheet. If the Transaction file is correct, click the Process button in the bottom right of the screen.

To choose a different transaction file (like for re-using a layout with a new spreadsheet you wish to import), click the Select a file icon.

Find the file you wish to import, then click Open. To import this file, click the Process button in the bottom right of the screen.

When the import has completed, the Item Import Audit will appear. The audit will show how many records were processed, created, updated, deleted and failed. If there were failures, Agility will not import those records. Failures display in the audit with a column that explains the cause of the failure. There is also a column for Warnings, which explain what data in the import file may not match what is in Agility. Records with warnings will still be imported, unlike failures.



The audit report can be exported to Excel. Use the export file to make corrections and import the file back into Agility.

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