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Importing data from Excel as new objects to M-Files using Import Objects Tool

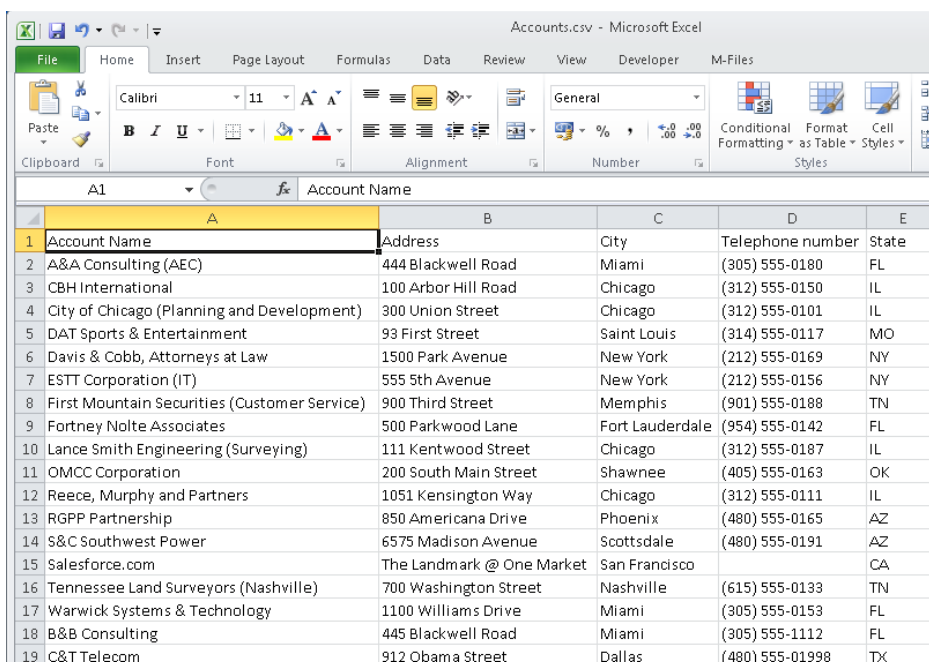
Summary

This document describes how to import data from Excel spreadsheet to M-Files as new M-Files objects using M-Files Import Objects Tool. This tool is a payable add-on for M-Files. Please contact your M-Files partner for more information.

Preparations in Excel

Data in Excel must be in structured format (Figure 1).

1. Use first row as a column name
2. Use secondary rows as a data
3. Save the document in CSV file format



	A	B	C	D	E
	Account Name	Address	City	Telephone number	State
1	Account Name	Address	City	Telephone number	State
2	A&A Consulting (AEC)	444 Blackwell Road	Miami	(305) 555-0180	FL
3	CBH International	100 Arbor Hill Road	Chicago	(312) 555-0150	IL
4	City of Chicago (Planning and Development)	300 Union Street	Chicago	(312) 555-0101	IL
5	DAT Sports & Entertainment	93 First Street	Saint Louis	(314) 555-0117	MO
6	Davis & Cobb, Attorneys at Law	1500 Park Avenue	New York	(212) 555-0169	NY
7	ESTT Corporation (IT)	555 5th Avenue	New York	(212) 555-0156	NY
8	First Mountain Securities (Customer Service)	900 Third Street	Memphis	(901) 555-0188	TN
9	Fortney Nolte Associates	500 Parkwood Lane	Fort Lauderdale	(954) 555-0142	FL
10	Lance Smith Engineering (Surveying)	111 Kentwood Street	Chicago	(312) 555-0187	IL
11	OMCC Corporation	200 South Main Street	Shawnee	(405) 555-0163	OK
12	Reece, Murphy and Partners	1051 Kensington Way	Chicago	(312) 555-0111	IL
13	RGPP Partnership	850 Americana Drive	Phoenix	(480) 555-0165	AZ
14	S&C Southwest Power	6575 Madison Avenue	Scottsdale	(480) 555-0191	AZ
15	Salesforce.com	The Landmark @ One Market	San Francisco		CA
16	Tennessee Land Surveyors (Nashville)	700 Washington Street	Nashville	(615) 555-0133	TN
17	Warwick Systems & Technology	1100 Williams Drive	Miami	(305) 555-0153	FL
18	B&B Consulting	445 Blackwell Road	Miami	(305) 555-1112	FL
19	C&T Telecom	912 Obama Street	Dallas	(480) 555-01998	TX

Figure 1: Data in Excel

Using Import Objects Tool

You can launch "Import Objects" tool from M-Files Task Area (Figure 2)

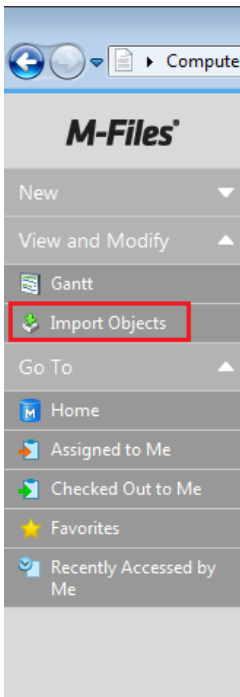


Figure 2: Import Objects Tool shortcut

When the tool opens, select your CSV file and press "Read CSV File" button. Next set the Column settings and last map columns in CSV file to correspond M-Files Property Values (Figure 3).

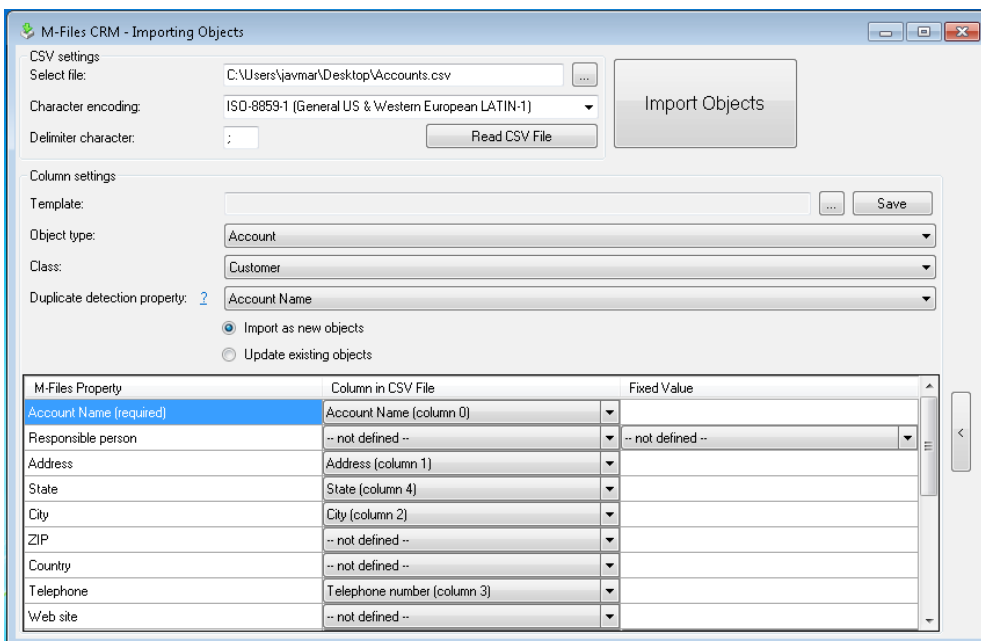


Figure 3: Import Objects Tool

Features

- Several CSV file encodings supported (UTF-8, ISO-8859-1, ISO-8859-15)
- Possibility to set CSV data limiter character
- Import any M-Files objects in the vault
- Duplicate detection based on any M-Files Property
- Possibility to import new objects and update existing objects
- Data mapping

- Automatic data column detection (if column name in CSV corresponds M-Files property value name)
 - All M-Files data types supported
 - Possibility to insert fixed values for M-Files properties (For example give fixed responsible person for all imported objects)
- Importing sub-objects: You can import two related objects at the same time from one file (For example Customers and Contact Persons)
 - Setting templates: you can save you import setting for later usage

Applies to

- M-Files 7.0 and later