

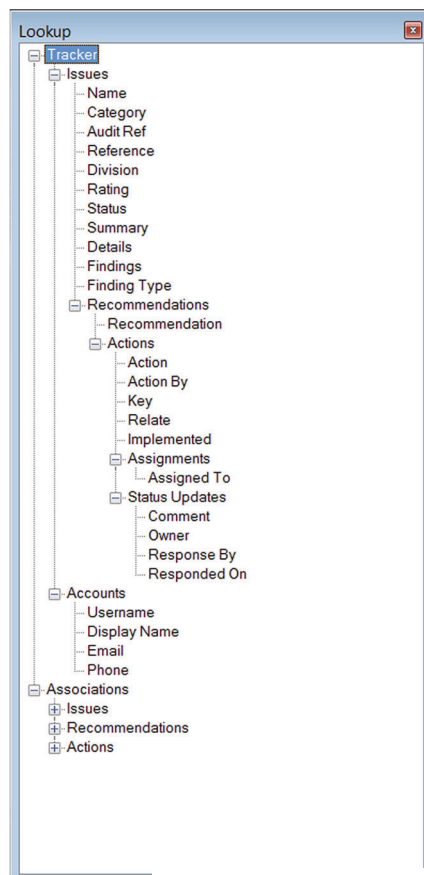
Symbiant Tracker Data Importer

The Symbiant Tracker data importer allows you to import data from Word or Excel documents. It also allows you to have different data in different tables and map relationships so you can import issues with multiple recommendations and actions.

The image below shows you all the fields you can import data into. If you have renamed your fields in Tracker those changes will be reflected in the Lookup when you click the “Refresh Theme Text” under options.

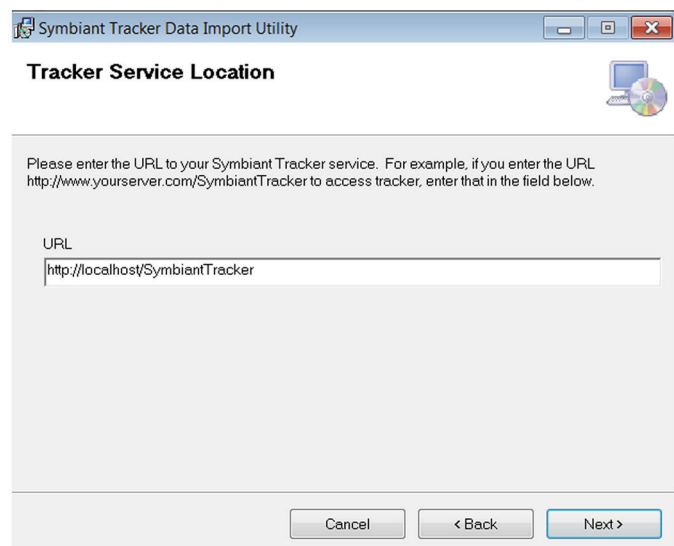
When importing actions you can also import the assignees update comments (responses) by just ensuring you use a common reference to make the match between the user comment and the action it relates to. (see the example table)

If you have lists of users on a spreadsheet or in a word document you can also import those to populate the user accounts. This allows you to export the data from another source and import it directly in to Tracker.

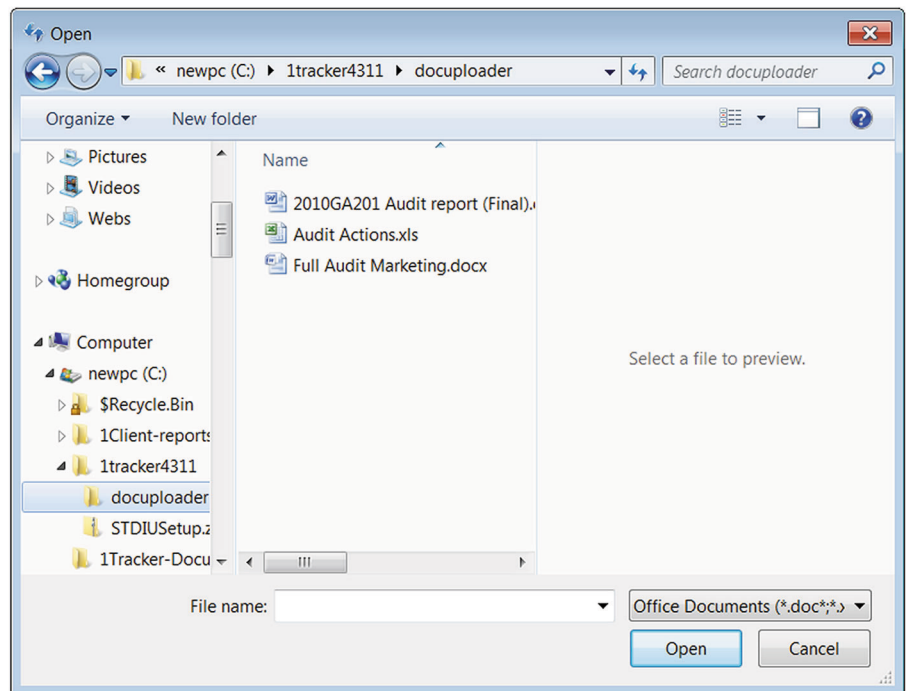
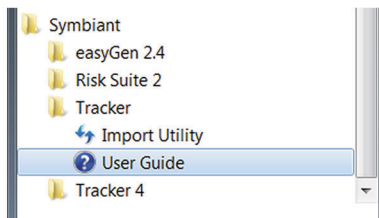


You need to install the importer on the PC of the people who will be doing the importing. These users must be Administrator users. You must also ensure you point to the URL of the site where you access Tracker. This is very important and done when you install.

If your site moves please contact Symbiant support for advice on how to change the settings.

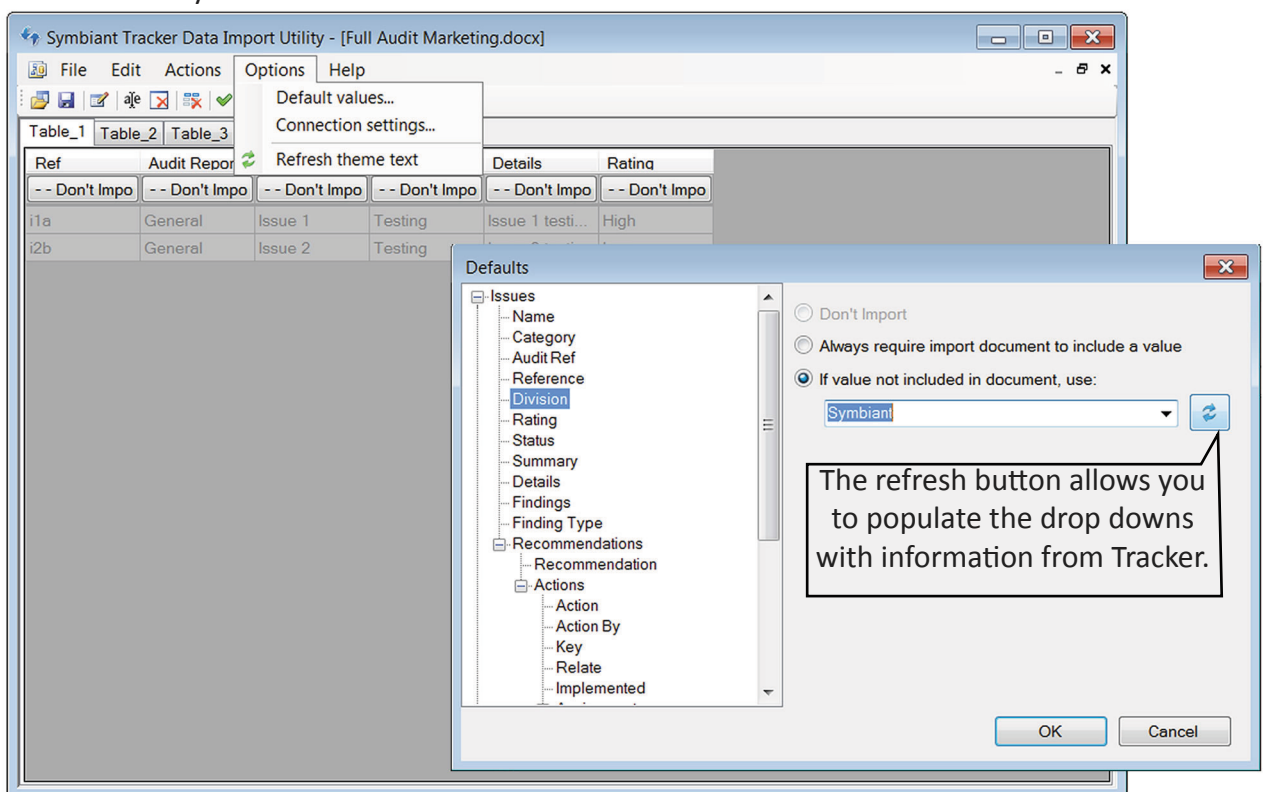


Open the importer via the Windows start menu and navigate to *Program Files > Symbiant > Tracker > Import Utility*
Then select the Word or Excel File you wish to import

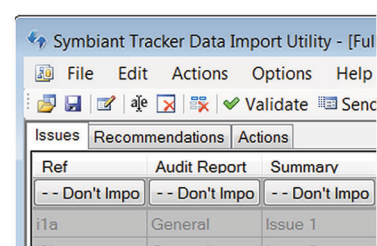
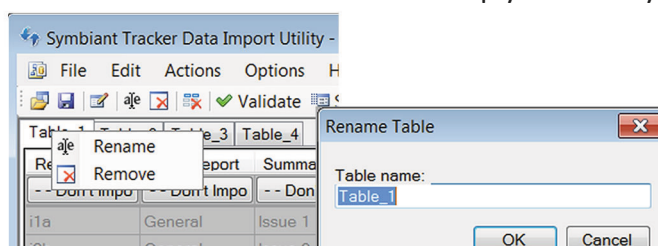


Under Options

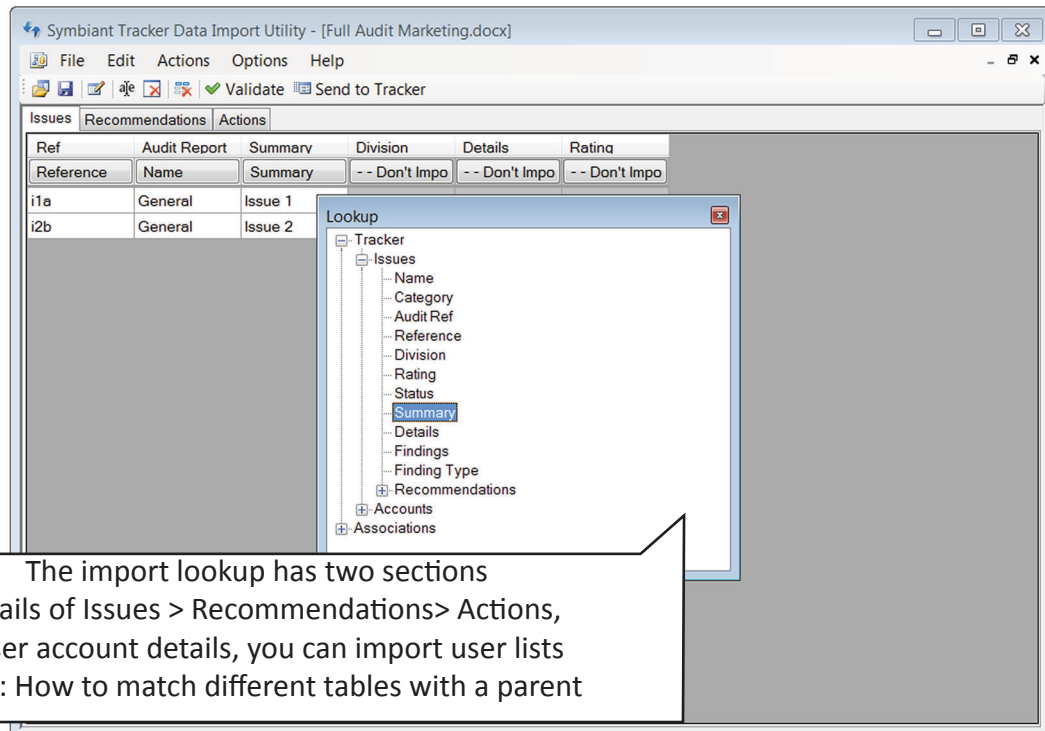
Default Values allow you to select defaults and information that should be used for missing data. The **Connection Settings** is where you put your Tracker user details. Only administrator level users can import in to Tracker. The **Refresh Theme** allows you to use the wording for headers and tables that you use in Tracker.



If you mouse over the tabs and Right Click on your mouse you can **remove** or **rename** the tables in the documents to help you identify what is what.



On each tab (Table) you need to tell the importer where the data for that cell goes. Click on the default *...Don't Import* and expand the lookup box to make the selection. Because data in other tables may need to marry up with the parent data we suggest you do it in **Issue, Recommendation, Action** order if it is the case that this information is in separate tables like our example below.



If your document has multiple tables and those tables hold information that is linked to a Parent, i.e. recommendations link to issues and actions link to recommendations you will need to have a common point of reference to make the match. You do this under the Associations section.

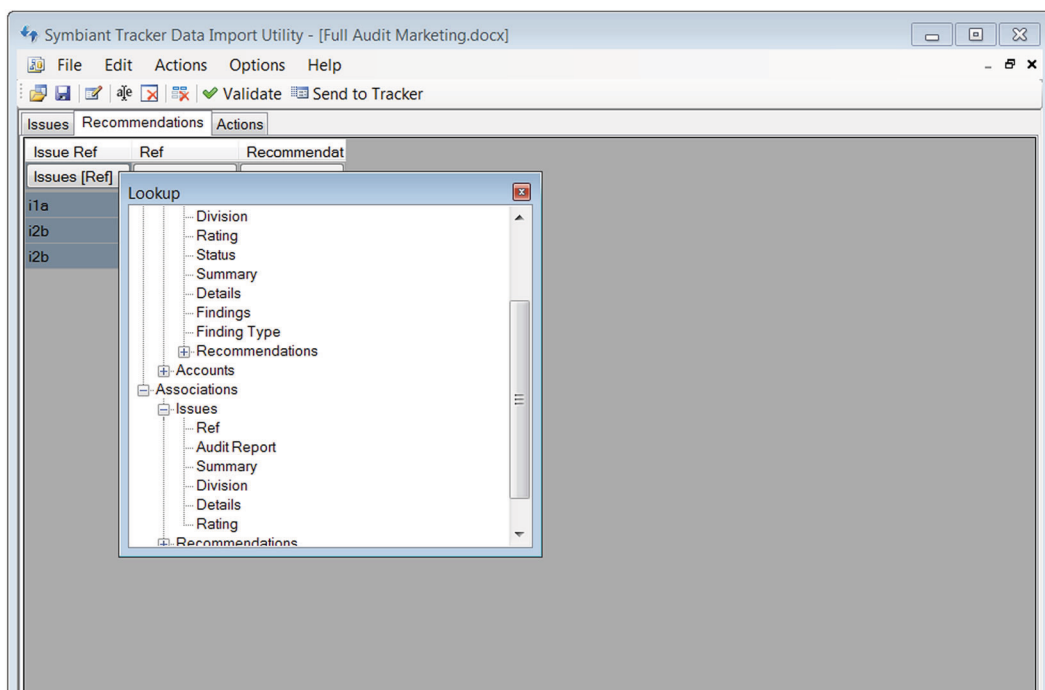
The image below shows 3 columns for Recommendations. Column 1 is the reference of the issue the recommendation belongs to and column 2 is the reference of the recommendation so we can match the actions that belong to it, whilst column 3 is the recommendation itself. The Action table will also contain a reference to match that of the recommendation it connects to.

Therefore the Match is:

Recommendation issue ref matches issue ref

Action ref matches Recommendation ref

On the next page we have a copy of the document we are importing.



Below is a copy of the word document we have used for our examples.
As you can see their are four tables.

The first has the issue details,
The second has the recommendations,
The third is actions which could include action updates
The fourth contains data about the audit itself.

We only want to import the data relating to the Issue, Recommendation and the Actions
so we removed table four and renamed the others.

Some information such as the References from the Recommendation and Action Table are
not to be imported but used to match data to it's parent.

If you had user comments or more issue details in another table you would use the same
process to map them, a common reference to where they belong.

Ref	Audit Report	Summary	Division	Details	Rating
i1a	General	Issue 1	Testing	Issue 1 testing * Bullet test * And another	High
i2b	General	Issue 2	Testing	Issue 2 testing Newline test	Low

 **Match**

Issue Ref	Ref	Recommendation
i1a	r1	Issue 1 Recommendation 1
i2b	r2	Issue 2 Recommendation 1
i2b	r3	Issue 2 Recommendation 2

Match 

Ref	Action	Action By	Assigned To
r1	Issue 1 Recommendation 1 Action 1	10/12/2010	Paul
r1	Issue 1 Recommendation 1 Action 2	11/11/2010	Andrew
r2	Issue 2 Recommendation 1 Action 1	12/11/2010	Andrew
r3	Issue 2 Recommendation 2 Action 1	14/12/2010	Paul

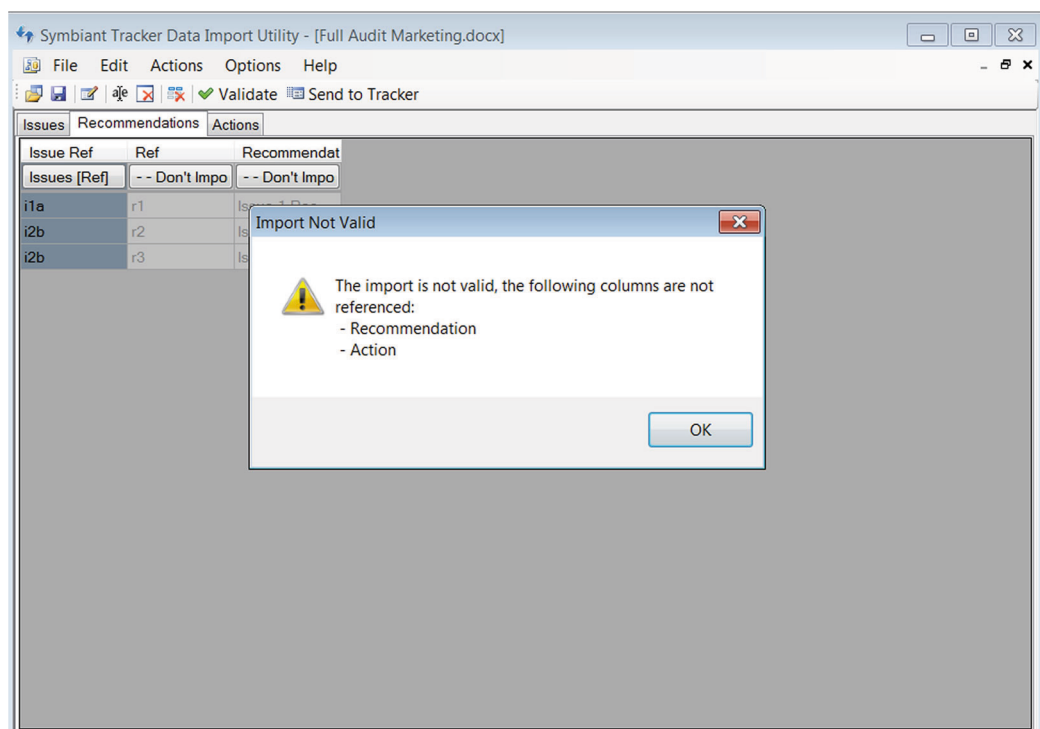
Full Audit For Marketing Services at XYZ Bank Auditor B. Smith

When you have mapped all your data click the Validate Button. This will check all the basic information required has been matched up or defaults set. The validate check will display any errors it finds and you can either correct it via the tables or under the options link by editing the Default Values.

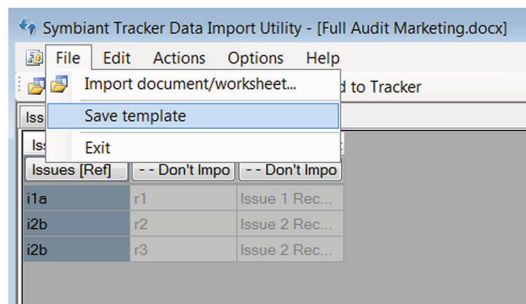
Under Default Values you can select if issue data is required via the imported document or not to be imported or mapped to a specific value.

When you are ready to update Tracker with the data just click on the Send to Tracker link and providing your user details are correct the data will be imported.

NOTE: before you can upload data you must first have first filled in your user details under Options Connection Settings and you must be an administrator level user.



If you use a standard document on a regular basis you can save all your customising as a Template. This saves you having to do everything again the next time you import.



If you require help on your documents or training on the importer please contact us at www.symbiant.co.uk