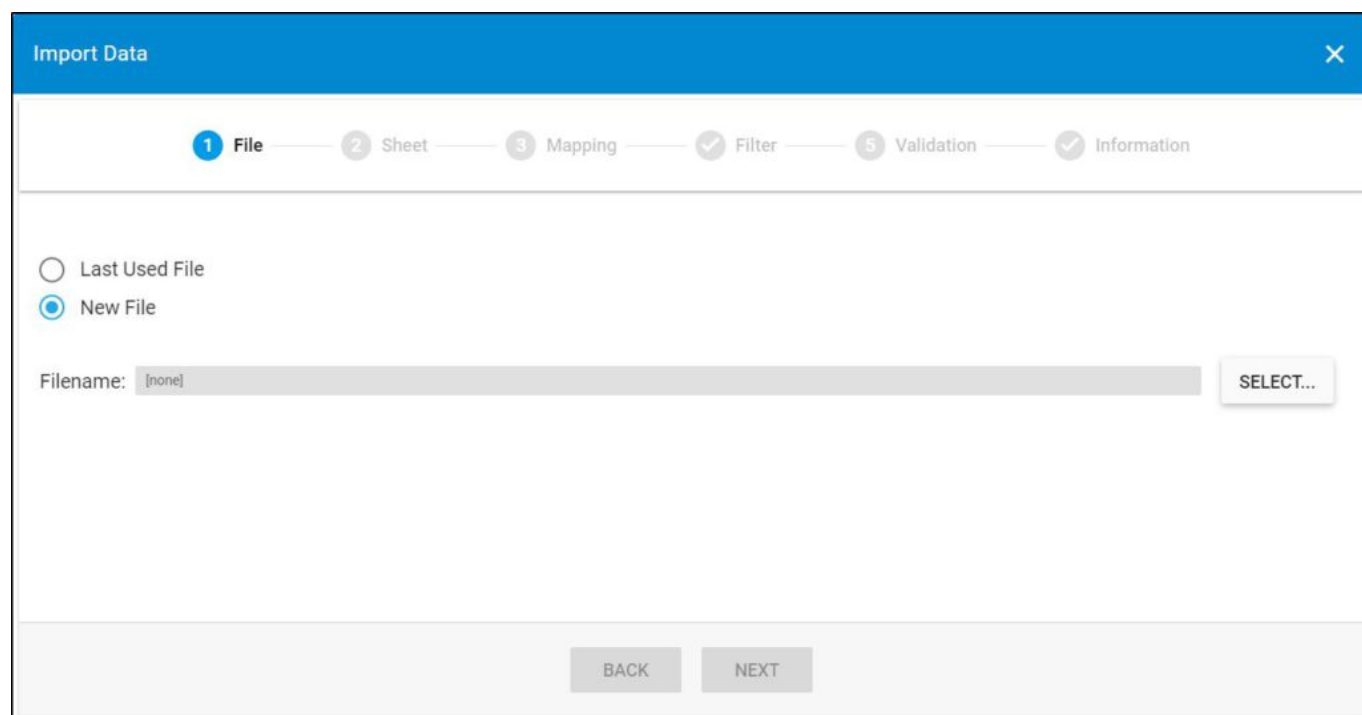


## Import collections

You can import a list to create collections and add articles to them at the same time. You can specify the collection name, the path which specifies the hierarchy of collection folders, and the article number to be assigned to each collection. This process saves the time needed to add collections and assign articles to them individually. You can also import collection folders along with their criteria.

To import a file with collections, follow these steps:

1. Click the **Import** button, the following window appears:



The screenshot shows a window titled "Import Data" with a blue header bar and a close button (X) in the top right corner. Below the header is a progress bar with six steps: 1. File (active, blue circle), 2. Sheet (grey circle), 3. Mapping (grey circle), 4. Filter (grey circle with checkmark), 5. Validation (grey circle), and 6. Information (grey circle with checkmark). Below the progress bar, there are two radio buttons: "Last Used File" (unselected) and "New File" (selected, blue circle). Below the radio buttons is a text field labeled "Filename:" with the value "[none]" and a "SELECT..." button to its right. At the bottom of the window are two buttons: "BACK" and "NEXT".

2. Click **Select** to browse for the file you want to import,
3. Select the file then click **Open**, the name of the file you selected appears in its field,
4. Click **Next**, the following window appears:

Import Data

✓ File — ✓ Sheet — 3 Mapping — ✓ Filter — 5 Validation — ✓ Information

Please select the sheet that contains the data you wish to import

Collections ▼

BACK NEXT

You can click **Back** to return to the previous window.

5. Select the sheet you want from the dropdown list in case your Excel file contains more than one sheet,
6. Click **Next**, the following window appears:

Import Data

✓ File

✓ Sheet

✓ Mapping

✓ Filter

5 Validation

✓ Information

Please select the columns in your sheet that match each of the following fields. All fields marked with a \* are mandatory and must be mapped before continuing.

🔍 Search

Name\*

=

Name\*

Name

×

Path\*

=

Path\*

Path

×

BACK

NEXT

7. Select the column of the sheet that matches each field, columns are different depending on the collection type of the selected catalog, whether it is Article or Criteria,
8. Click **Next**, the following window appears:

The screenshot shows a 'Import Data' window with a blue header bar containing the title and a close button. Below the header is a progress bar with six steps: 'File', 'Sheet', 'Mapping', 'Filter', 'Validation', and 'Information'. The 'Validation' step is the current active step, indicated by a blue circle with the number '5'. The main area of the window contains the question 'Would you like to import all the rows in the sheet or only the rows that match a specific criteria?'. There are two radio button options: 'Import All Rows' (which is selected) and 'Import Only the Rows that match the following criteria:'. At the bottom of the window, there are two blue buttons labeled 'BACK' and 'NEXT'.

Import Data

File Sheet Mapping Filter 5 Validation Information

Would you like to import all the rows in the sheet or only the rows that match a specific criteria?

☒ Import All Rows

☐ Import Only the Rows that match the following criteria:

BACK NEXT

9. Click the radio button next to the import method, either all rows or rows that match certain criteria, a validation window appears informing you if records are valid or not, if not, you need to fix the sheet then import the file again,
10. Click **Next**, the following window appears:

Import Data

File Sheet Mapping Filter 5 Validation Information

Would you like to import all the rows in the sheet or only the rows that match a specific criteria?

☒ Import All Rows

☐ Import Only the Rows that match the following criteria:

BACK NEXT

The validation window shows the status of the import process, the total number of valid rows, and the total number of invalid and skipped rows. The above example shows that all the rows are valid.

11. Click **Next**, the following window appears:

Import Data

✓ File

✓ Sheet

✓ Mapping

✓ Filter

✓ Validation

✓ Information

Your data is ready to be imported, please click on the Submit button below to submit the request to the server.

BACK

SUBMIT

12. Click **Submit**, the progress is displayed,
13. Wait until the job is finished, then refresh the page, the imported values are listed.

**Notes:**

- If changes are not reflected on the page, refresh the browser by pressing F5.
- If any of the records are invalid, you can skip them by clicking the checkbox next to *Skip invalid rows* as shown in the below example:

Import Data

✓ File

✓ Sheet

✓ Mapping

✓ Filter

5 Validation

✓ Information

Total Valid Rows:

1

Total Invalid Rows:

2

Total Skipped Rows:

0

ⓘ There are currently some invalid rows, please rectify these issues before continuing.

GET RESULT

☐ Skip invalid rows

BACK

NEXT

The **Next** button is activated, and you can import the valid rows.