

CVM eSubmitter

File Import Quick Guide

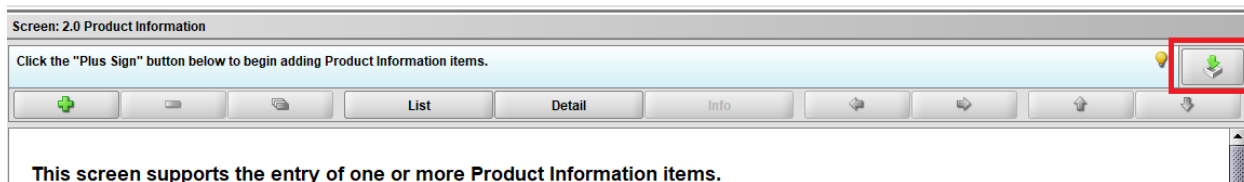
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I. Introduction

The purpose of the data import capability is to alleviate the task of manually performing data entry of large amounts of data that already exists elsewhere by allowing it to be imported automatically into the submission. The value of importing from Excel is that it is more efficient to use the navigational and copy/paste capabilities within Excel than it is to perform data entry within eSubmitter. Especially, when large amounts of data are to be included. There are two approaches to importing data with both being initiated by selecting the "Import Data" button on nodes where data import is enabled: Import All Data, and Import Selected Data using Copy/Paste from Excel.

II. Import all data from a Microsoft Excel File

To import data, select the **Import Data** button on sections where data import functionality is enabled.

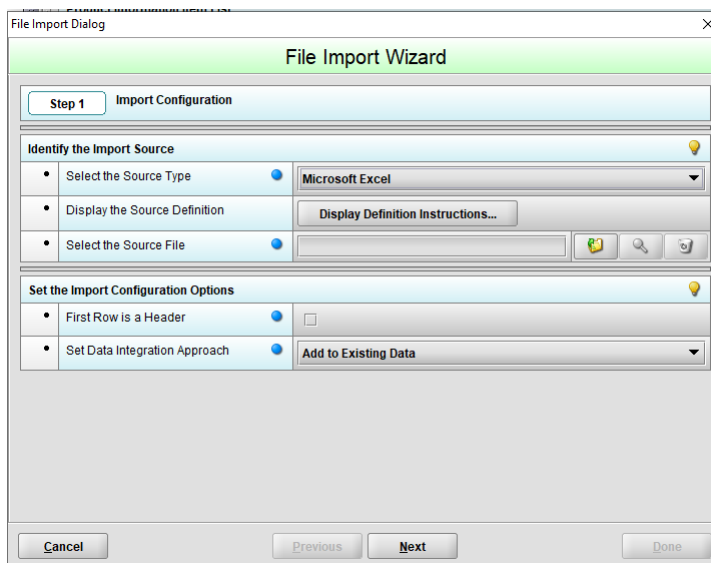


The Data Import Wizard dialog box will open where the import approach is selected.

The file import approach inherently includes all data contained within the specified file. The only constraint is that it is best suited to Excel files stored in the Excel 97-2003 Workbook format.

A. Import Configuration

After selecting "Import all data" from the Data Import Wizard Dialog box. The import configuration window will be displayed.



1. Select the Source Type

Selecting the source type identifies the structure of the file to be imported. Currently, the import only supports standard Microsoft Excel file formats from 1997 through 2003. It does not support the later Excel 2007 (.xlsx OOXML) file format. When using later versions of Excel, save the file to the 'Excel 97-2003 Workbook' format prior to importing.

2. Display the Source Definition

Displaying the source definition provides requirements on how the file must be structured to be successfully imported.

- Index identifies the column position within the spreadsheet
- Question/Column provides a description of the data to be provided within the column
- Constraints describes how the data must be formatted

The source definition instructions can easily be printed by using the print capabilities available within the browser they are displayed within.

3. Select the Source File

The source file to be imported can be selected by activating the folder button and browsing your local file system or network and selecting an appropriate file. In addition, the contents of the source file can be viewed by activating the view option. Finally, the source file can be cleared by activating the delete button.

4. First Row is a Header

It is common within a spreadsheet to include header information within the first row to identify the contents of each row. Selecting this option ensures the first row of information is ignored so that header information is not imported as data.

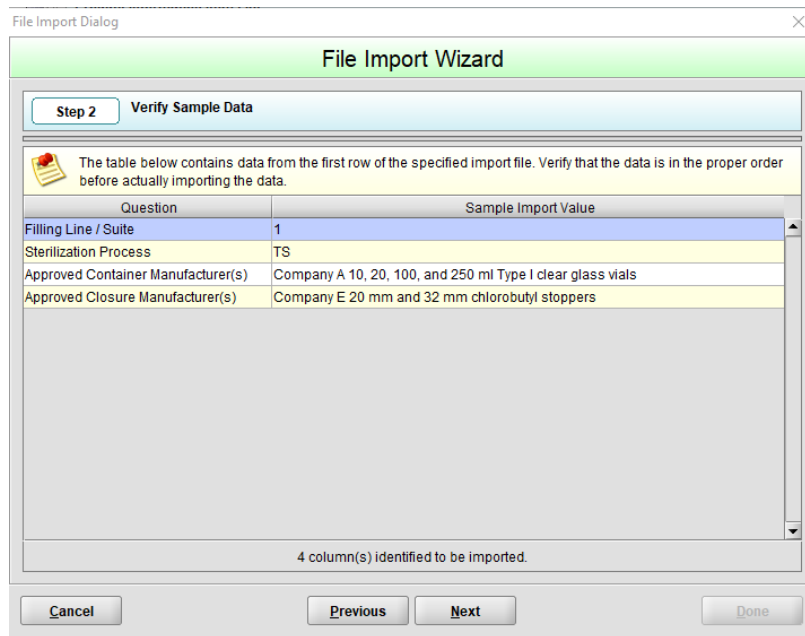
5. Set Data Integration Approach

The integration approach identifies how the imported data will be incorporated within the existing data of the report. The following options are available:

- Adding to the end of the existing data, or
- Replacing the existing data with the imported data.

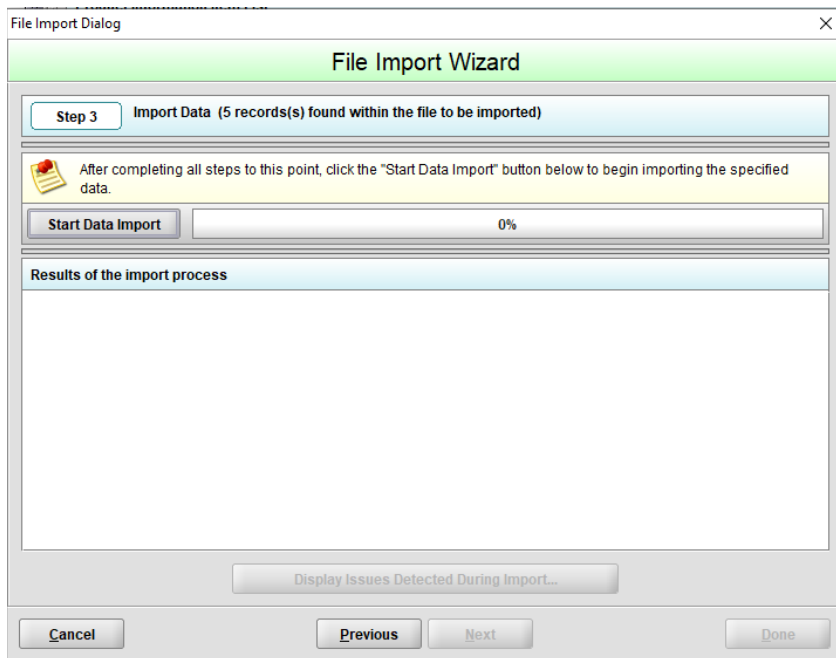
B. Verify Sample Data

Data from the first row of the specified file will be displayed. Verify that the data is in the proper order before importing the data set then select **Next**.

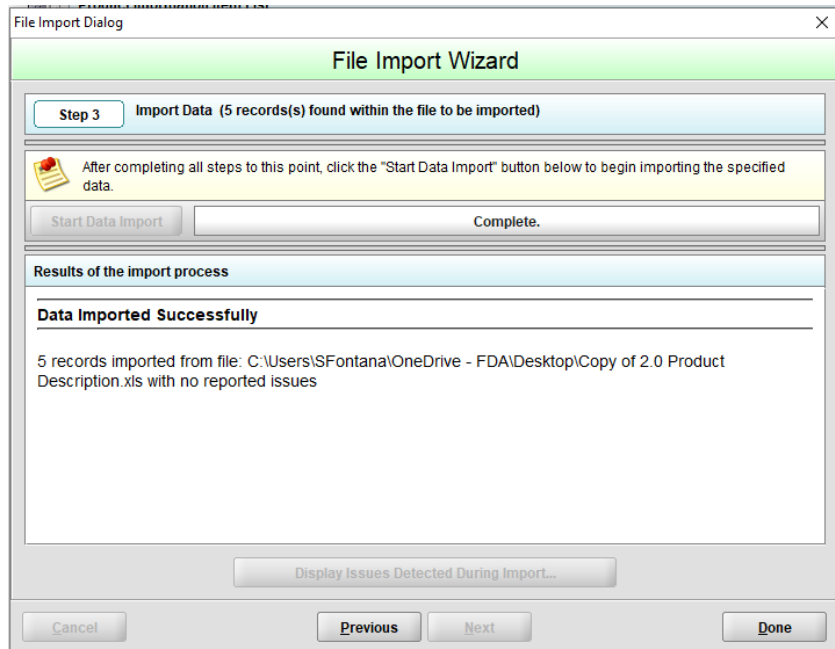


C. Import Data

The file import wizard will display the number of records found in the file to be imported. Click **Start Data Import** to import the data.



After reviewing the import results, click the **Done** option to close the import dialog and return to the eSubmitter section that now contains the imported data, or select the Previous option if more data is to be imported.



III. Import data selected using Copy/Paste from Microsoft Excel

Before you can import data using the eSubmitter Copy/Paste Wizard, the data must be entered within Microsoft Excel (or a compatible application that represents copied data in a tab-delimited format). The structure of the data must match the structure expected by eSubmitter for the currently selected screen. To get a description of the expected structure, click the **Data Definition...** option within the eSubmitter Copy/Paste Wizard. In addition, blank Excel templates are available within the Import subfolder of the eSubmitter application folder (see the Info view of the selected section within eSubmitter for a direct link to an appropriately structured blank Excel file).

A. Limitations

Copying data from Excel has a few limitations due to the way the information is stored within the clipboard.

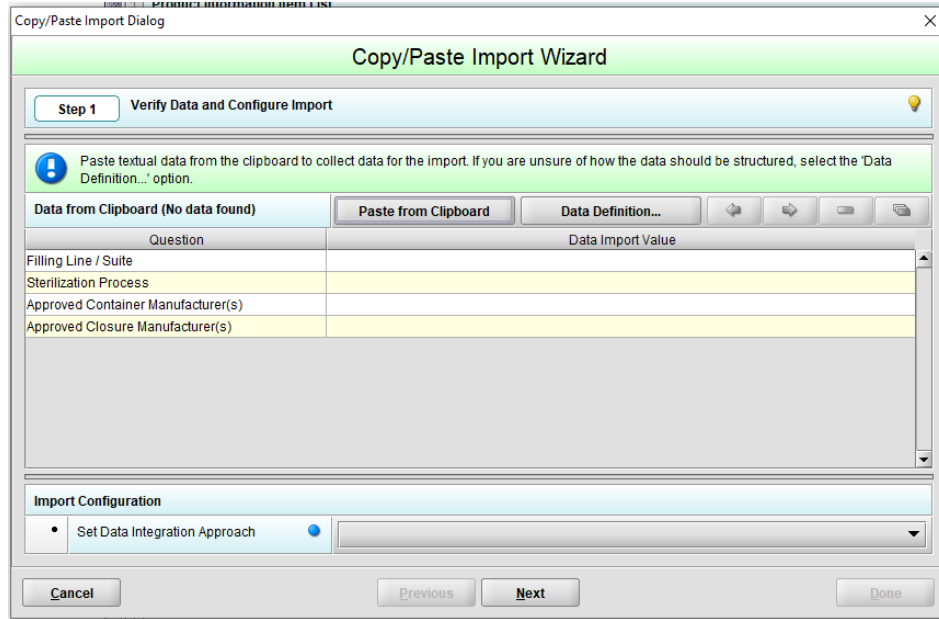
- Data must remain selected within Excel to be able to paste. Unlike copying text in Word, copied Excel data is not retained within the clipboard for re-use.
- To select only certain rows from a data set CTRL + click will not work. Excel will copy all the rows between your selections. Filtering the data set in Excel will enable only select rows to be copied. It may be necessary to add an additional column to your data set to facilitate copying select rows. The additional column will not be imported into eSubmitter, even if it is selected.

B. Verify Data and Configure Import

The first step in using the copy/paste import wizard is to collect the data to be imported from the system clipboard. This is accomplished by:

- Entering data in Excel in the proper structure for the selected screen
- Using the standard Select and Copy capabilities within Excel to copy the data to the system clipboard (only include data rows and not header information in the selection, use Excel's multi-select capabilities as needed, blank rows in the data will be ignored)
- Pasting the data into eSubmitter using the **Paste from Clipboard** option to retrieve the data from the clipboard (once pasted, a message will be displayed with the count of data rows retrieved, as well as a notation if the number of columns retrieved does not match the number of columns supported).

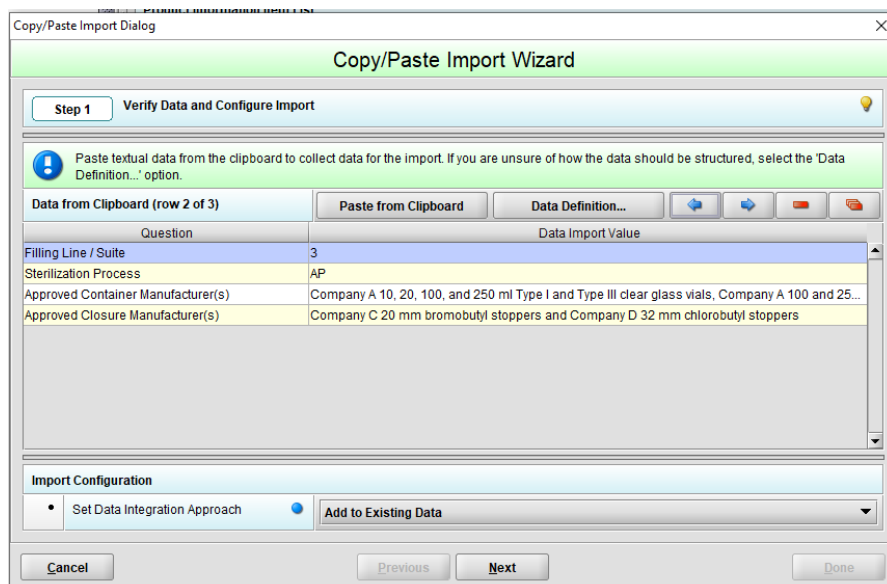
Note: the paste option can be performed multiple times, if needed, to collect the information to be imported. Attempting to paste data when the table already contains data from a previous paste will display a prompt letting the user select whether the new data should be added to or replace the existing data within the table.



1. Verifying the Data

Once the data is retrieved from the clipboard, the first row of the data is displayed within the table. Verify that the data in the table is aligned properly to the associated questions. The layout of the table has all questions from eSubmitter section (in the required order) in the first column and associated values from the data collected from the paste in the second column. The following options are available to data table:

- The Table Header includes a reference to the current row displayed and the total number of rows included
- Next Row and Previous Row options are available to support navigation between rows of data
- Delete Selected Row and Delete All Rows options are available to remove extraneous rows of data from the table prior to importing



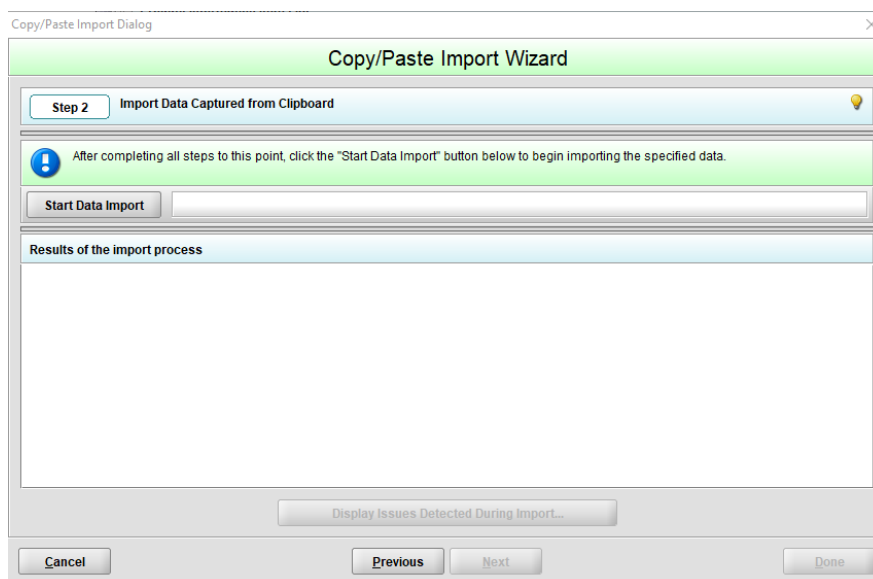
2. Set Data Integration Approach

The integration approach identifies how the imported data will be incorporated within the existing data of the submission. The following options are available:

- Adding to the end of the existing data
- Replacing the existing data with the imported data

C. Start Data Import

After pasting the data, verifying the contents, and configuring the import, the data can now be imported into the submission. Click the **Start Data Import** option to initiate the import process. Once initiated, a check will be performed to verify the amount of data allowed to be imported based on the existing data within the section and the data integration approach selected for the import (i.e., Add to or Replace existing data). If it is determined that not all the data collected can be imported, a prompt will be displayed listing how many rows can be imported with a user confirmation needed to proceed with the import.



D. Results of the Import Process

Once the import is completed, the results will be listed. There are two possibilities, the import was completely successful, or the import had issues.

1. Data Imported Successfully

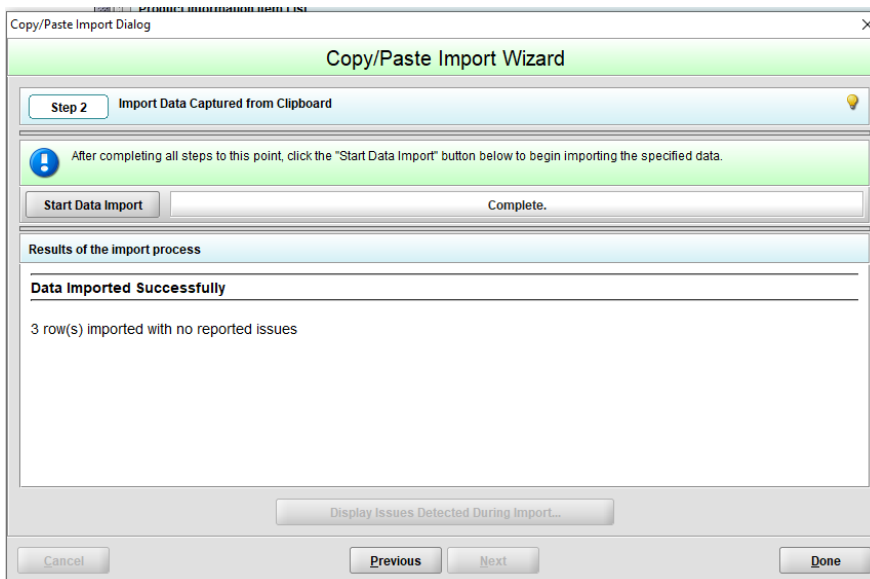
When successful, the results section will display the number of rows imported and report no issues found.

2. Data Imported with Issues

When issues are detected, the results will display the number of rows imported, along with the number of issues found. There are two types of data import issues. Those that result in data not being imported (e.g., an invalid option or format) and those that result in data being converted/transformed (e.g., data exceeding the

allowed length and being truncated to fit). Whenever issues occur during the import, the data imported should be verified within the submission and if necessary, corrected.

To display details on the issues found, click the **Display Issues Detected During Import...** option.



After reviewing the import results, click the **Done** option to close the import dialog and return to the eSubmitter section that now contains the imported data, or select the Previous option if more data is to be imported.