



## CSV Import

*Importing data with CSV files*

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## 1. Introduction

Data import (CSV) is used to import data in CSV format into the Docusnap database.

In this way, for example, additional data can be imported for inventoried systems. Furthermore, you can regularly create assets in Docusnap or update their data.

As an example of use, cell phones can be mentioned here. Cell phones are managed in an MDM solution - e.g. Intune. From the MDM solution, you can perform an export of the cell phones to CSV format. You can then import this CSV file into Docusnap - even on a scheduled basis.

Data imports via CSV files can be performed for existing tables, other assets and for additional information. You can also work with CSV imports in the Physical Infrastructure, but these are not performed via the wizard presented here. A description can be found in the HowTo for Physical Infrastructure in the [Knowledge Base](#).

The CSV file is decisive for the import. The columns of the CSV file should always have headings, otherwise no assignment of the data of the CSV file to the target properties can be made.

Specific mandatory fields are always required for the import. For this reason, it should always be checked in advance which mandatory fields are required. These mandatory fields must then be present in the CSV file and filled with values.

It is advisable to build up the CSV files from previously performed Excel exports. This way you already have the required fields and initial values (host types, locations, domains, etc.) available. The Excel export is explained again in the application example.

During the CSV import, you can select whether the import should be performed as an update. If data is already available you should import the data as an update. The imported data will then be compared with existing. A comparison field will then be required. The comparison field (host name, serial number, inventory number) is used to check whether the entry already exists and is therefore only to be updated, or whether a new entry is to be created.

## 2. Perform data import (CSV)

In our application example, we want to provide the inventoried workstations with inventory numbers, a description, and an assigned user.

The following steps are performed

- Excel export
- Prepare the CSV file
- Perform import
  - Select destination
  - Select source (CSV file)
  - Assign data
  - Update
  - Set up scheduling

### 2.1 Perform Excel Export

All lists within the data areas in Docusnap can be exported accordingly with a right click - Excel Export. Likewise, you can set filters on the lists before exporting.

We now export the list of inventoried workstations. After that we have all available fields and therefore also the mandatory fields for the import - as well as the fields which should be imported with newly added data.

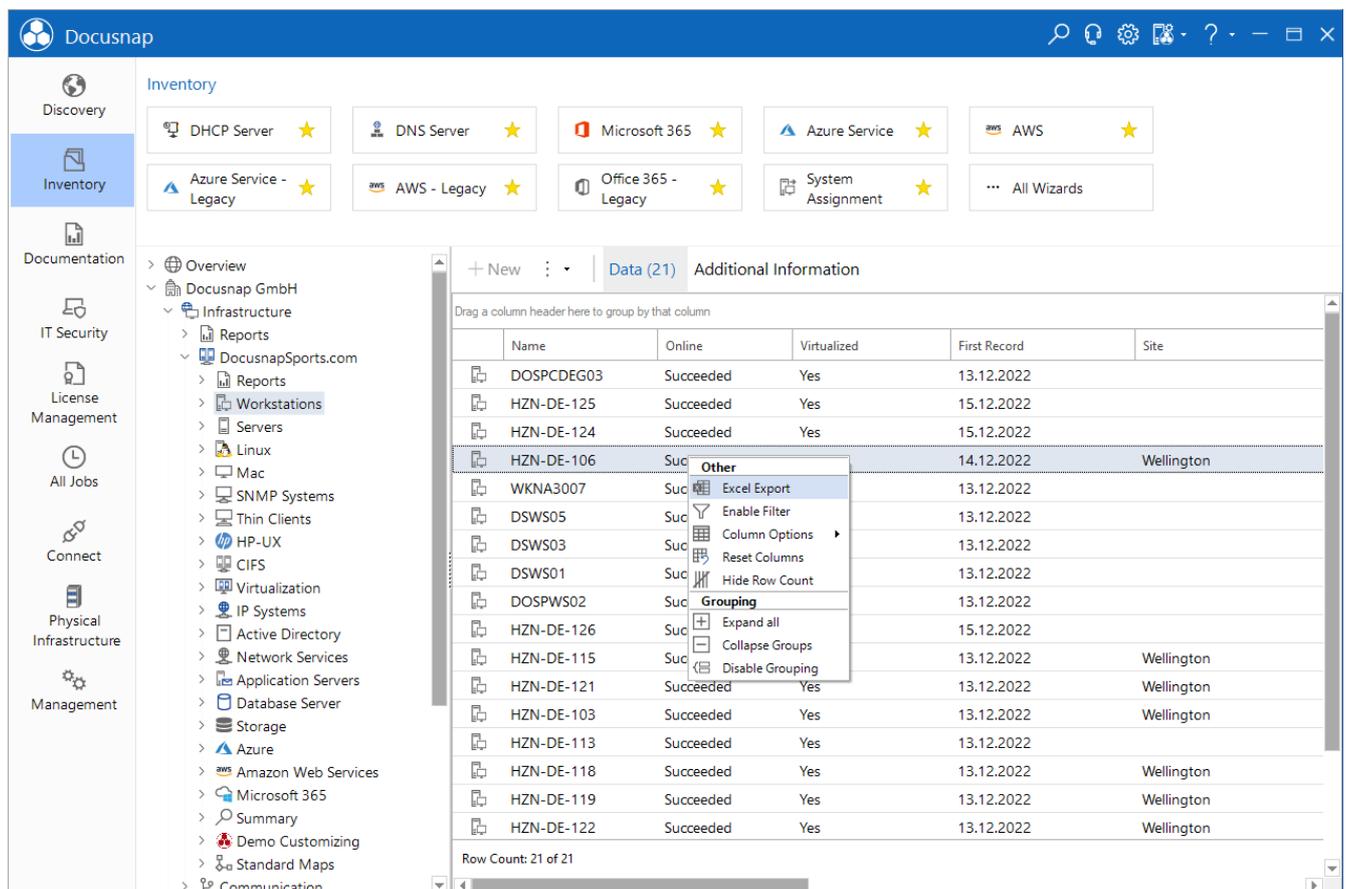


Figure 1 - Excel Export

## 2.2 Preparation of the CSV file

The previously exported Excel list is extended with the information to be imported. In this case:

- Description
- Inventory number
- Assigned user

After preparation, the Excel file is saved as a CSV file.

For the actual import, the CSV file must have at least the following structure:

Name	Domain	Type	Description	Inventorynumber	Assigned User
DOSPWS01	docusnapsports.com	Workstation	Accounting	DOSP100017-AT	User A
DOSPWS02	docusnapsports.com	Workstation	Finance	DOSP100020-AT	User B
DOSPWS03	docusnapsports.com	Workstation	HR	DOSP100011-AT	User C
DOSPWS04	docusnapsports.com	Workstation	Marketing	DOSP100428-AT	User D
DOSPWS06	docusnapsports.com	Workstation	IT	DOSP100681-AT	User E
DOSPWS09	docusnapsports.com	Workstation	Reception	DOSP100682-AT	User F
DOSPWS10	docusnapsports.com	Workstation	IT	DOSP100683-AT	User G
DOSPWS11	docusnapsports.com	Workstation	Marketing	DOSP100684-AT	User H
DOSPWS12	docusnapsports.com	Workstation	Sales	DOSP100685-AT	User I
DOSPWS13	docusnapsports.com	Workstation	Sales	DOSP100686-AT	User J
DOSPWS14	docusnapsports.com	Workstation	Testsystem	DOSP100687-AT	User K

## 2.3 Perform CSV-Import

Start the CSV import wizard in the All jobs - All wizards - CSV import section.

In **Step 1 - Import**, select the destination where you want to import to. In this example it is

- Table: Hosts - ( tHosts )

In **Step 2 - Source** select the location of the CSV file

- Activate the first row as a header
- Check in the preview if the CSV file is displayed correctly
  - Adjustments can be made by selecting the separator character

In **Step 3 - Data Assignment**, CSV values are now mapped to the target properties - in this case, the columns of the tHosts table.

- The fields marked with a yellow triangle are the mandatory fields and must be mapped.
  - In this case: Name, Domain, Type
- **Import as update**
  - If data already exists in the target that is to be updated, the import must be performed as an update. Without this option, you will otherwise have corresponding duplicates!

In **Step 4 - Update** you now define the comparison field, which is used to check whether the data set to be imported already exists and is therefore updated, or newly added.

- In the Update Settings you can determine whether
  - Existing records will be updated and new records will be added or
  - Only new records will be added.

In **Step 5 - Scheduling** you can now schedule the CSV import with the previously set information

**Important: With an scheduled CSV import, it must be guaranteed that the column order of the CSV file always remains exactly the same. Docusnap uses the column order for the assignment and not the assignment of the headings!**

- The scheduled CSV import is performed by the Docusnap Server service
  - The source selected in step 2 must be accessible by the Docusnap Server!
    - It is recommended to store the CSV files locally on the Docusnap Server.
- At each execution it is checked whether the source selected in step 2 is available
  - If the CSV file is available, the import is performed and the CSV file is moved to an archive folder
  - If no CSV file is available at the next execution, nothing will be imported.
    - This can be seen in the summary of the job (Successfully completed - no files had to be imported).

## LIST OF FIGURES

FIGURE 1 - EXCEL EXPORT

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## VERSION HISTORY

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Date	Description
12/15/2022	HowTo created

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