



flexicadastre

*Governance - Risk - Compliance*

## Leveraging the Bulk Importers

*FlexiCadastre NAM Regional User Conference, Denver  
April 13<sup>th</sup> – April 14<sup>th</sup>, 2015*

spatial dimension

# INTRODUCTION

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- Bulk Importers are available in the Bulk Productivity Module
  - Agreement Importer
  - Party Importer
  - Actions Importer
    - Mixed Action Type Importer (Generic Action Importer)
    - Payment Action Type Importer
  - Work Commitment Details Importer
    - Work Commitment Action Importer
  - Documents
    - Document Details Importer

# Bulk Agreement Importer

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- Similar to that of the License Importer, there is now an Agreement Importer available in FlexiCadastre.
- Users with authorization to Add Agreements are able to
  - **Import**
  - **Update**

# Bulk Agreement Importer

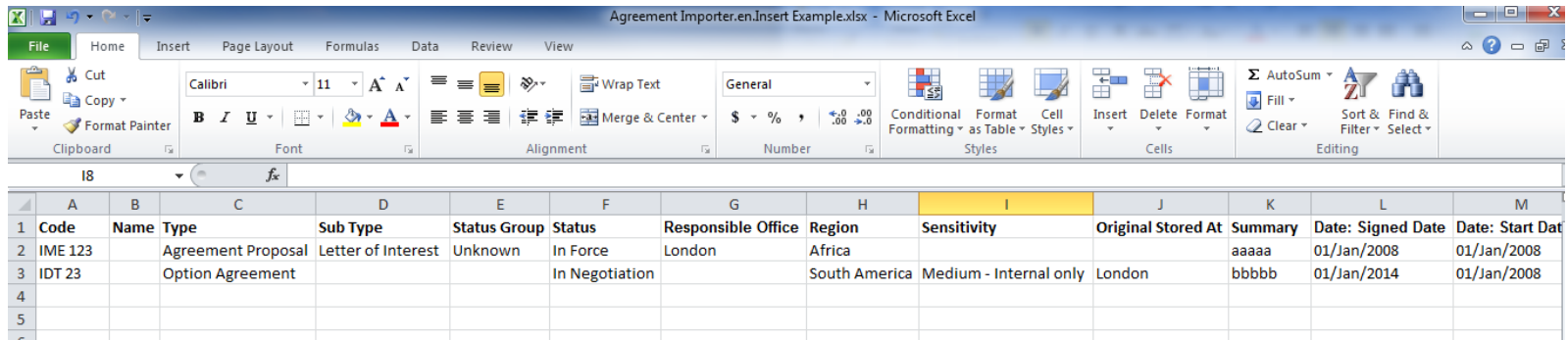
## Download the Bulk Agreement Importer Template

- Navigate to the Agreements Search page, click **more tools** and then click the **Import** button
- Follow the prompts and select the Download Template hyperlink

The screenshot shows a web browser window with the URL <http://online.flexicadastre.com/WorkDemo/Plugins/Generic%20Wizards/WizardStepFileUpload.aspx?Wizar>. The browser title is "Wizard Step : File Upload - Windows Internet Explorer". The page content is titled "Agreement Importer" and includes a navigation bar with buttons for "< START", "File Upload", "CANCEL", and "CONFIGURATION >". Below the navigation bar, there is a "Select file to import:" label, a text input field, and a "Browse..." button. A blue hyperlink labeled "Download Template" is positioned below the input field and is circled in red. In the background, the "Agreements > Search" page is visible, featuring search filters for "Code:", "Name:", and "Party:", and a "SEARCH" button. A "more..." link is also present, with a small icon next to it circled in red.

# Bulk Agreement Importer

## Review the Fields available for data import



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Code	Name	Type	Sub Type	Status Group	Status	Responsible Office	Region	Sensitivity	Original Stored At	Summary	Date: Signed Date	Date: Start Date
2	IME 123		Agreement Proposal	Letter of Interest	Unknown	In Force	London	Africa			aaaaa	01/Jan/2008	01/Jan/2008
3	IDT 23		Option Agreement			In Negotiation		South America	Medium - Internal only	London	bbbbbb	01/Jan/2014	01/Jan/2008
4													
5													

## Available Agreement Importer Template Fields

- Code
- Name
- Type
- Sub Type
- Status Group
- Status
- Responsible Office
- Region
- Sensitivity
- Original Stored At
- Summary
- Date
- In Perpetuity
- Area
- Area Unit
- Shape Legal Description
- Jurisdiction
- Party: [your party type]
- Party%:
- Commodity
- Commodity (2)
- Group Name: [your group type]
- Group Code: [your group type code]
- Reference Code: [your ref. code]
- Reference Code Date: [your ref. code date]
- Role
- Condition Type
- Condition Description
- Condition Value
- Condition Unit
- Condition Start Date
- Condition End Date
- License Code
- License Name

# Bulk Agreement Importer

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## Important to Note when Populating the Template:

- Agreement Importer Required Fields:
  - Code, Type
- Ensure field names from the template match your Flexi Database
  - Ex. Group Name: **Project** vs. Group Name: **Projects**
- Data that is populated by LookUp tables or other Business Objects needs to exist prior to importing
  - Ex. If Responsible Office = London, then London must already be in the Responsible Office Look Up table.
- Fields that are not in use or not required can be removed from the template.

# Bulk Agreement Importer

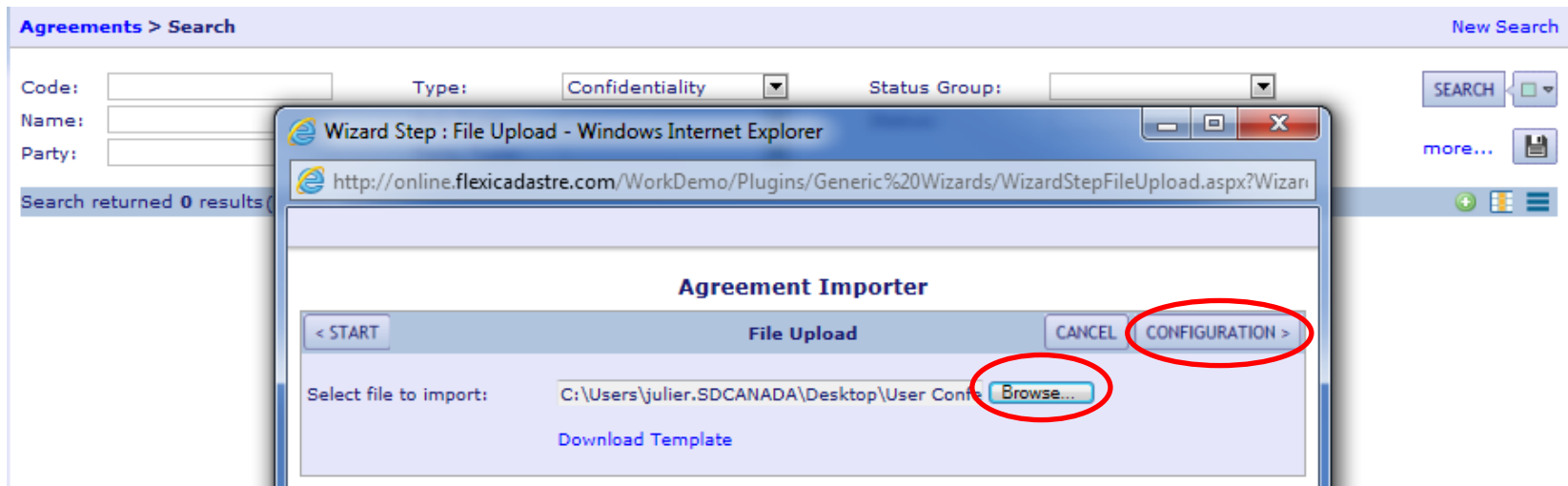
- Populating the Agreement Importer Template
  - Please note that Agreement Type can be varied
  - The Types have to match how it is identified in Flexi.

	A	B	C	D	E	F	G	H
1	Code	Name	Type	Sub Type	Status Group	Status	Responsible Office	Region
2	UC-CA-Demo-001	UC - CA-Demo-001	Confidentiality	test	Active	Active		North America
3	UC-JV_2008-002	UC - Dimension Mining JV	Joint Venture		Inactive	Terminated		North America
4	UC-OA FMC-09-01-	UC - Option Agreement 09-01-	Exploration		Active	Active		
5	UC-RA-2014-001	UC - Demo Royalty	Royalty		Active	Active	Toronto	North America

# Bulk Agreement Importer

## Importing the Populated Template

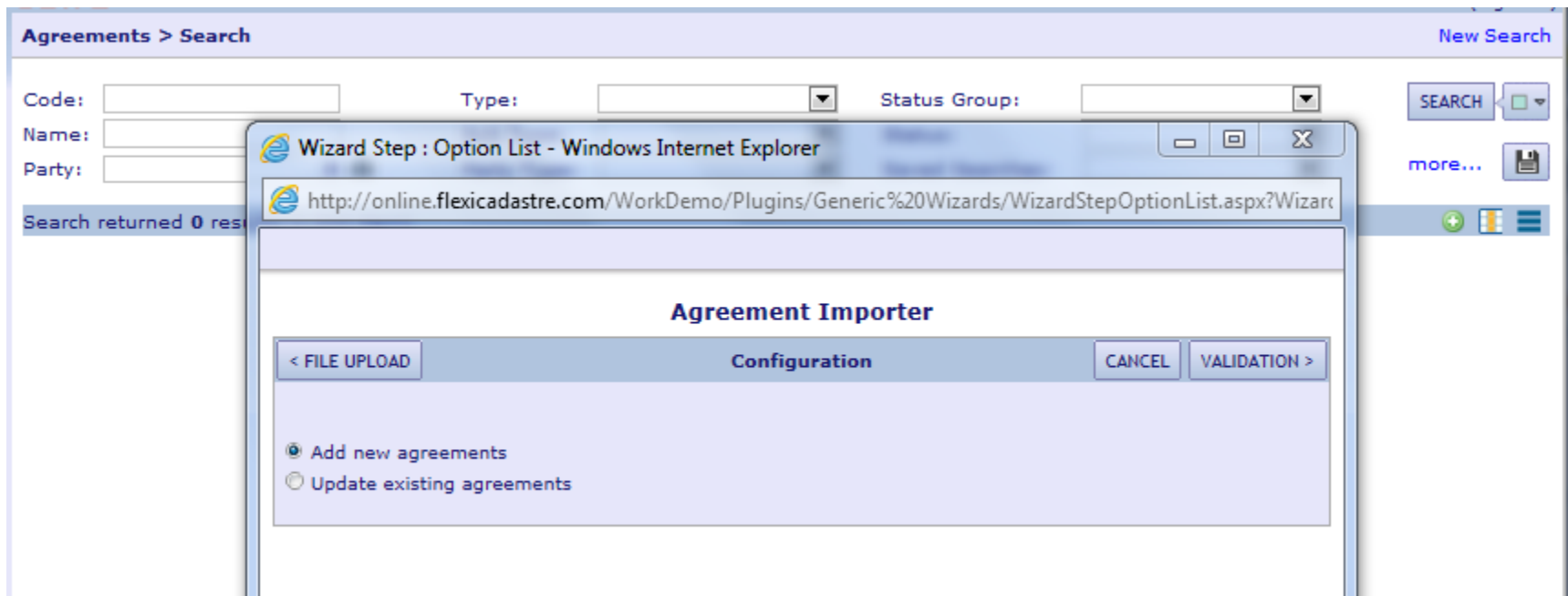
- Navigate to the Agreements Search page, click **more tools** and then click the **Import** button
- Follow the prompts, select Browse and navigate to your newly saved template
- Continue following the prompts





# Bulk Agreement Importer

- Select 'Agreement Importer'
- Follow prompts to 'Add new agreements'



# Bulk Agreement Importer

- If the data is incorrect, Flexi will return a Validation Error list.

The screenshot displays the 'Agreement Importer' window in a web browser. The window title is 'Wizard Step - Process monitor - Windows Internet Explorer'. The address bar shows the URL: <http://online.flexicadastre.com/WorkDemo/Plugins/Generic%20Wizards/WizardStepProcessMonitor.aspx?WizardIdentifier=Agreement+Importer>. The main content area is titled 'Agreement Importer' and has a 'VALIDATION' tab selected. Below the title, it says 'FAILED' and 'Validating spreadsheet and columns complete.' A section titled 'The following warnings occurred during the process.' contains a list of critical errors:

- Critical Error - Unable to continue import: Party type 'Venture' specified does not exist in FlexiCadastré. Field: Party: Venture
- Critical Error - Unable to continue import: Party type 'Venture' specified does not exist in FlexiCadastré. Field: Party %: Venture
- Critical Error - Unable to continue import: Map reference category 'Province' specified does not exist in FlexiCadastré. Field: Map Reference: Province
- Critical Error - Unable to continue import: Group type 'Project' specified does not exist in FlexiCadastré. Field: Group Name: Project
- Critical Error - Unable to continue import: Group type 'Project' specified does not exist in FlexiCadastré. Field: Group Code: Project
- Critical Error - Unable to continue import: Group type 'Affidavit' specified does not exist in FlexiCadastré. Field: Group Code: Affidavit
- Critical Error - Unable to continue import: Group type 'Affidavit' specified does not exist in FlexiCadastré. Field: Group Name: Affidavit
- Critical Error - Unable to continue import: Reference code type 'No.' specified does not exist in FlexiCadastré. Field: Reference Code: No.
- Critical Error - Unable to continue import: Reference code type 'No.' specified does not exist in FlexiCadastré. Field: Reference Code Date: No.

# Bulk Agreement Importer

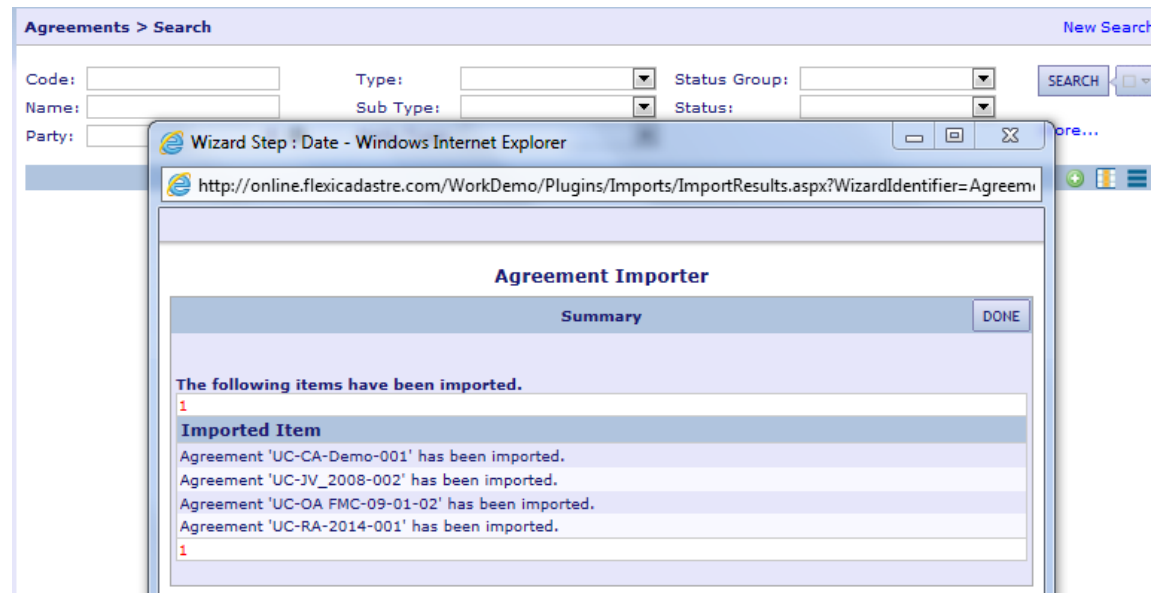
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## Common Validation Errors Include

- Data not found in the system
- Field names do not match your Flexi naming convention exactly
- A field you wish to populate is not available
- Dates are using the wrong syntax in the excel spreadsheet
  - dd/mmm/yy
  - ddd/mmm/yy
  - dd/mm/yy
    - To determine the correct date syntax – refer to the date syntax set up for the system, **not** the personal date preference set up in My Settings.

# Bulk Agreement Importer

- Fix the Validation Errors
- Re-import the Excel Spreadsheet, following previous steps
- Successful Import!



The screenshot displays a web application interface for managing agreements. In the background, there is a search form titled "Agreements > Search" with fields for Code, Name, Party, Type, Sub Type, Status Group, and Status, along with a "SEARCH" button. Overlaid on this is a "Wizard Step : Date" window from Internet Explorer, showing the URL: <http://online.flexicadastre.com/WorkDemo/Plugins/Imports/ImportResults.aspx?WizardIdentifier=Agreem>. The main content of the wizard is titled "Agreement Importer" and contains a "Summary" section with a "DONE" button. The summary text reads: "The following items have been imported." followed by a list of four imported items: "UC-CA-Demo-001", "UC-JV\_2008-002", "UC-OA FMC-09-01-02", and "UC-RA-2014-001".

# Bulk Agreement Importer

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# Party Importer

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- The Party Importer is available for both Licenses and Agreements
- Download the template the same as you would download a License and Agreement Import Template
- Party Importer allows the user to:
  - Add parties (imported parties will be added to existing parties)
  - Overwrite parties (existing parties will be removed and imported parties will be added)
  - Update Parties (existing parties with matching party types will be removed and imported parties will be added)

# Party Importer

## Review the Fields available for data import

	A	B	C	D	E	F	G
1	Code	Name	Type	Party	Party Type	Percentage	Shares
2							
3							
4							

## Available Party Importer Template Fields

- Code
- Name
- Type
- Party
- Party Type
- Percentage
- Shares
- Commodity
- Depth From
- Depth From Unit
- Depth To
- Depth To Unit
- Geological Unit

# Party Importer

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## **Important to Note when Populating the Template**

- Party Importer Required Fields
  - Code, Name, Party, Party Type
- Data that is populated by LookUp table or other Business Objects needs to exist prior to import



# Party Importer

- Populated Party Importer Template

	A	B	C	D	E	F	G
1	<b>Code</b>	<b>Name</b>	<b>Type</b>	<b>Party</b>	<b>Party Type</b>	<b>Percentage</b>	<b>Shares</b>
2	UC-CA-Demo-001	UC - CA-Demo-001	Confidentiality	Dimension Mining	Grantee/Lessee	50	
3	UC-JV_2008-002	UC - Dimension Mining JV	Joint Venture	Big Time Mining	Grantee/Lessee	50	
4	UC-OA-FMC-09-01-02	UC - Option Agreement 09-01-	Exploration	Big Time Mining	Grantee/Lessee	50	
5	UC-RA-2014-001	UC - Demo Royalty Agreement	Royalty	Dimension Mining	Grantee/Lessee	50	

- Importing the populated template
  - Navigate to the Agreements Search Page, click **more tools** and then click **Import** button
  - Follow the prompts, select Browse and navigate to your newly saved template

# Party Importer

## Importing the Populated Template

- Select either Add Parties, Overwrite parties, or Update parties

The screenshot shows a web application interface for 'Agreements > Search' with search filters for Code, Name, Party, Type, Sub-Type, Status Group, and Status. A 'SEARCH' button and a 'more...' link are visible. Overlaid on this is a 'Wizard Step : Option List - Windows Internet Explorer' window. The window title bar shows the URL: <http://online.flexicadastre.com/WorkDemo/Plugins/Generic%20Wizards/WizardStepOptionList.aspx?Wizar>. The main content of the wizard is titled 'Party Importer' and includes a 'Configuration' section with three radio button options:   
-  Add parties (imported parties will be added to existing parties)   
-  Overwrite parties (existing parties will be removed and imported parties will be added)   
-  Update parties (existing parties with matching party types will be removed and imported parties will be added)   
Navigation buttons include '< FILE UPLOAD', 'CANCEL', and 'VALIDATION >'.

# Party Importer

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## Common Validation Errors Include

- Party names not found in the system
- Party Type names not found in the system
- Code and Name syntax not correct

# Party Importer

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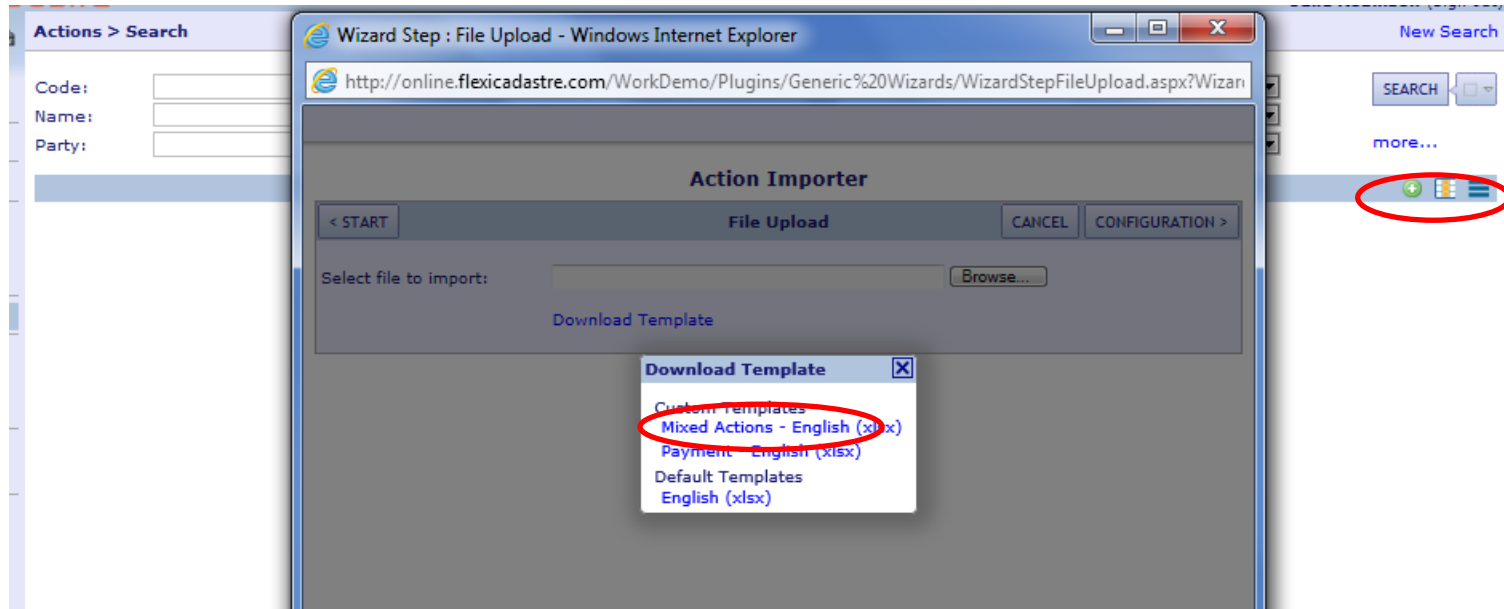
# Mixed Action Importer

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- An Action Importer has been implemented to allow users to
  - Create or update the generic details of any action types
- Users with authorization to Add Actions are able to import or update actions.

# Mixed Action Importer

- Select Actions in the Main Menu panel to navigate to the Action Importer
- Select Mixed Actions – English (xlsx) to download template



# Mixed Action Importer

## Review the Fields available for data import

	A	B	C	D	E	F	G	H	I	J	K
1	License Code	License Name	Agreement Code	Agreement Name	Group Name: Project	Group Code: Project	Type	Due Date	Reference Number	Comment	Result
2											
3											

## Available Mixed Action Importer Fields

- License Code
- License Name
- Agreement Code
- Agreement Name
- Group Name: Project
- Group Code: Project
- Type
- Due Date
- Reference Number
- Comment
- Result
- Date Closed
- Reference Code: RT-Code
- Reference Code Date: RT-Code

# Mixed Action Importer

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## Important to Note when Populating the Template:

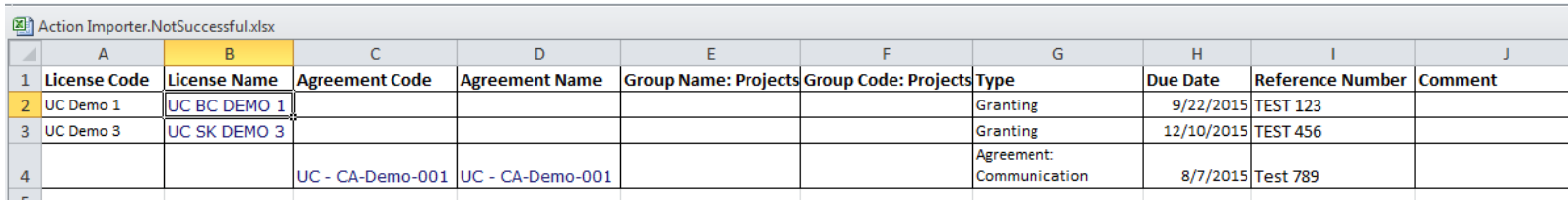
- Mixed Action Importer Required Field(s):
  - Code for either License, Agreement, or Group
- Can be used to add new actions in bulk to many Licenses, Agreements or Groups
- When adding or updating Mixed Actions, business rules can be triggered as appropriate
- Can be used to Update attributes of existing actions

**HINT:** Export existing actions from Flexi first and use the data to populate your template



# Mixed Action Importer

- Populating the Mixed Action Importer Template
  - Note that you can import actions for both Licenses, Agreements, and Groups in one template



	A	B	C	D	E	F	G	H	I	J
1	License Code	License Name	Agreement Code	Agreement Name	Group Name: Projects	Group Code: Projects	Type	Due Date	Reference Number	Comment
2	UC Demo 1	UC BC DEMO 1					Granting	9/22/2015	TEST 123	
3	UC Demo 3	UC SK DEMO 3					Granting	12/10/2015	TEST 456	
4			UC - CA-Demo-001	UC - CA-Demo-001			Agreement: Communication	8/7/2015	Test 789	

- Recommended practice is to set up individual action import templates for your business one for License, one for Agreement, and one for Group.

# Mixed Action Importer

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## Importing a Populated Template

- Similar to the Agreement importer steps, follow the prompts for the Action Importer
- Ensure you select:
  - Select Mixed Actions
  - Add new actions
  - Update existing actions
- Continue following prompts.
- Validation Errors may be returned

# Mixed Action Importer

## Common Validation Errors include

- Only required to indicate whether the mixed actions are applicable to License OR Agreement OR Group
- Type name needs to be exactly like the Action Type name in your Flexi environment.

The screenshot shows a web browser window titled "Wizard Step - Process monitor - Windows Internet Explorer" displaying the "Action Importer" validation results. The dialog box is titled "Action Importer" and shows a "VALIDATION" status that has "FAILED". It indicates that "3 of 3 Actions validated" but then lists three critical errors:

- 1 Critical Error - Unable to continue import: No Action Type matching the name specified was found in the system. Field: Type Record: 2
- 1 Critical Error - Unable to continue import: No Action Type matching the name specified was found in the system. Field: Type Record: 3
- 1 Critical Error - Unable to continue import: No single Agreement matching the code and/or name specified was found in the system. Record: 4

The background shows a search results table with columns for "All", "Type", "Status", and "Projects". The "Projects" column lists "Silvertip" and "Cluff Lake".

# Mixed Action Importer

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- Fix the Errors in the excel Spreadsheet
- Reimport & Success!



# Payment Action Type Importer

- Same as the Mixed Action Importer
- Select Actions in the Main Menu panel to navigate to the Action Importer
- Select Payment – English (xlsx) to download template

The screenshot displays the 'Action Importer' wizard in a web browser. The wizard is titled 'Wizard Step : File Upload - Windows Internet Explorer' and is open to the 'File Upload' step. A 'Download Template' button is highlighted, and a dropdown menu is open, showing the option 'Payment - English (xlsx)' selected and circled in red. The background shows a search results table with columns 'All', 'Type', 'Status', and 'Code'.

All	Type	Status	Code
<input type="checkbox"/>			UC Demo 3
<input type="checkbox"/>			UC Demo 3
<input type="checkbox"/>			UC Demo 3
<input type="checkbox"/>			UC Demo 3
<input type="checkbox"/>			UC Demo 3
<input type="checkbox"/>			UC Demo 3
<input type="checkbox"/>			UC Demo 3
<input type="checkbox"/>			UC Demo 3
<input type="checkbox"/>			UC Demo 3
<input type="checkbox"/>			UC Demo 3

# Payment Action Type Importer

## Review the Fields available for data import

	A	B	C	D	E	F	G	H	I	J
1	License Code	License Name	Agreement Code	Agreement Name	Group Name: Project	Group Code: Project	Type	Due Date	Reference Number	Comment
2										
3										

## Available Payment Importer Fields

- License Code
- License Name
- Agreement Code
- Agreement Name
- Group Name: Project
- Group Code: Project
- Type
- Due Date
- Reference Number
- Comment
- Result
- Date Closed
- Reference Code: RT-Code
- Reference Code Date: RT-Code
- Direction
- Accounting Code
- Receipt No
- Paid By
- Paid To
- Actual Amount
- Actual Currency
- Budget Currency
- Valued By
- Valuation Method
- Valuation Type
- Valuation Amount
- Valuation Currency
- Valuation Rate

# Payment Action Type Importer

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## Important to Note when Populating the Template

- Payment Importer Required Field(s):
  - Code and Name for either License, Agreement, or Group
- Same as the Mixed Action importer
  - When adding or updating Payment Actions, business rules can be triggered as appropriate
  - Can be used to add new actions in bulk to many Licenses, Agreements, or Groups
  - Can be used to Update attributes of existing actions

# Payment Action Type Importer

- When updating existing actions, best practice is to conduct a search and export the actions.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Code	Name	Action	Comments	Date Due	Completed	Days Rem	Currency	Budgeted	Actual Currency	Actual	Accounting Code
2	207	CHUCHI	Payment: Cash in Lieu (BC) (CAD 3,328.00)		5/3/2015		22	CAD	3,328.00	CAD		
3	9999	Audrey 1	Payment: Cash in Lieu (BC) (CAD 5,000.00)		5/3/2015		22	CAD	5,000.00	CAD		
4	775	CHUCHI	Payment: Cash in Lieu (BC) (CAD 6,658.40)		6/25/2015		75	CAD	6,658.40	CAD		
5	88	CHUCHI	Payment: Cash in Lieu (BC) (CAD 9,250.20)		12/31/2015		264	CAD	9,250.20	CAD		
6	89	CHUCHI	Payment: Cash in Lieu (BC) (CAD 9,250.40)		12/31/2015		264	CAD	9,250.40	CAD		
7	90	CHUCHI	Payment: Cash in Lieu (BC) (CAD 9,254.40)		12/31/2015		264	CAD	9,254.40	CAD		
8	92	CHUCHI	Payment: Cash in Lieu (BC) (CAD 9,254.40)		12/31/2015		264	CAD	9,254.40	CAD		
9	43	CHUCHI	Payment: Cash in Lieu (BC) (CAD 13,863.90)		12/31/2020		2091	CAD	13,863.90	CAD		

- Then copy and paste the relevant fields into the Template and amend the data accordingly.

R2		Canadian Dollar													
	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	License Na	Type	Due Date	Reference Num	Comment	Result	Date Clos	Direction	Accounting C	Receipt No	Paid By	Paid To	Period Frc	Period To	Actual Amou
2	CHUCHI	Payment: Cash in Lieu (BC)	5/3/2015			Successful	4/11/2015	Outgoing			Logan Resources Incorporated				3,328.00
3	Audrey 1	Payment: Cash in Lieu (BC)	5/3/2015			Successful	4/11/2015	Outgoing			Logan Resources Incorporated				5,000.00
4	CHUCHI	Payment: Cash in Lieu (BC)	6/25/2015			Successful	4/11/2015	Outgoing			Logan Resources Incorporated				6,658.40
5	CHUCHI	Payment: Cash in Lieu (BC)	12/31/2015			Successful	4/11/2015	Outgoing			Logan Resources Incorporated				9,250.20
6	CHUCHI	Payment: Cash in Lieu (BC)	12/31/2015			Successful	4/11/2015	Outgoing			Logan Resources Incorporated				9,250.40
7	CHUCHI	Payment: Cash in Lieu (BC)	12/31/2015			Successful	4/11/2015	Outgoing			Logan Resources Incorporated				9,254.40
8	CHUCHI	Payment: Cash in Lieu (BC)	12/31/2015			Successful	4/11/2015	Outgoing			Logan Resources Incorporated				9,254.40
9	CHUCHI	Payment: Cash in Lieu (BC)	12/31/2020			Successful	4/11/2015	Outgoing			Logan Resources Incorporated				13,863.90



# Payment Action Type Importer

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## Importing a Populated Template

- Similar to the Mixed Action importer steps, follow the prompts for the Action Importer
- Ensure you select:
  - Select Payment Action
  - Add new actions
  - Update existing actions
- Continue following prompts.
- Upon Validation step, Validation Errors may be returned

# Payment Action Type Importer

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## Common Validation Errors Include

- Only required to indicate whether the payment actions are applicable to License OR Agreement OR Group
- Type name needs to be exactly like the Action Type name in Flexi
- Only able to add an Actual Amount to the Action
- When adding an Actual Amount, Actual Currency is required
- Unable to import Budget Amount at this time
- Company names indicated in the Paid By and Paid To fields need to be in Flexi
- Check the Date syntax

# Payment Action Type Importer

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- Fix any errors in the Template
- Re-save
- Re-import into Flexi
- Review results

# Payment Action Type Importer

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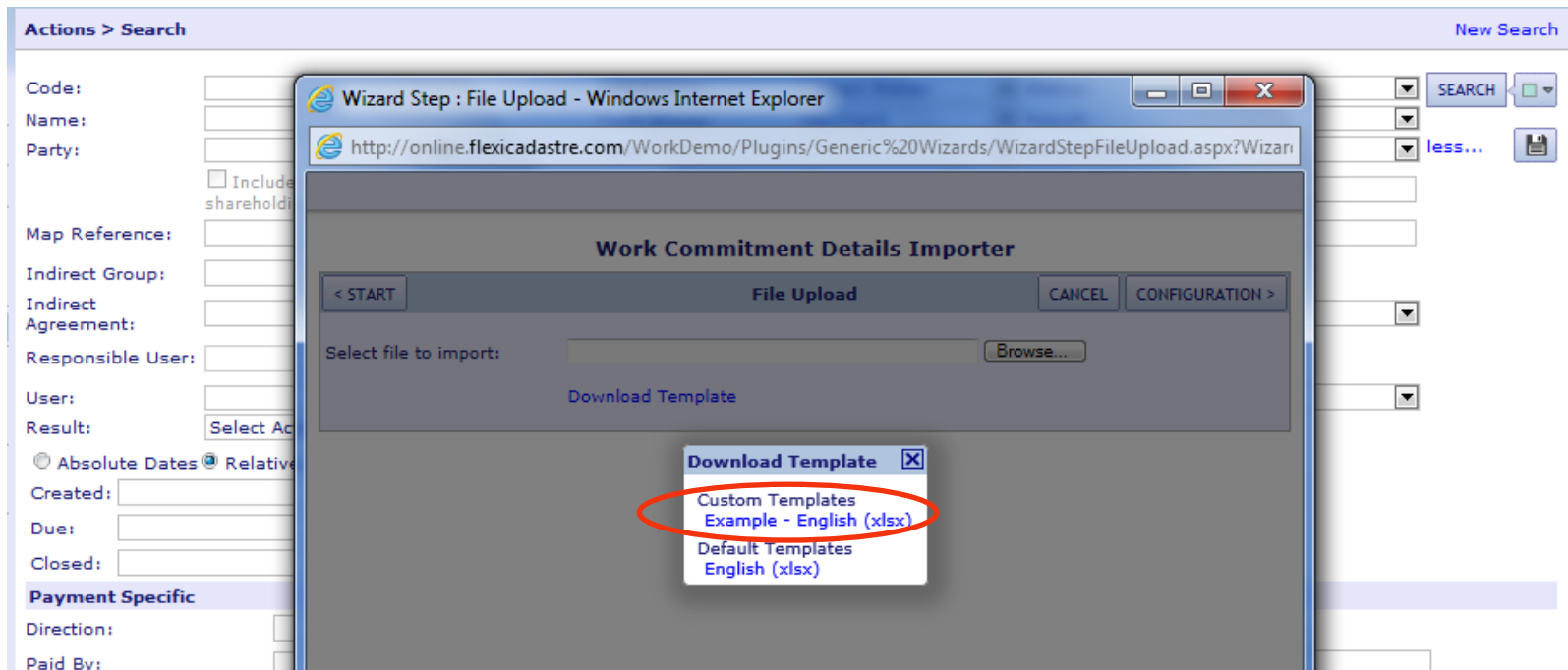
# Work Commitment Details Importer

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- A Work Commitment action can record Committed and Actual work performed in any number of Work Categories as line items on the action.
- The new Work Commitment Action Details Importer has been implemented in FlexiCadaastre to be able to **Update** existing Work Commitment Category, Sub Category, and detailed line items from an Excel spreadsheet
- The Template is available from the Actions status bar and accessible the same way as the Mixed Actions and Payment Actions importer.

# Work Commitment Details Importer

- Download the Excel file
  - Work Commitment Detail Importer.en.Example.xls



# Work Commitment Details Importer

## Review the Fields available for data import

	A	B	C	D	E	F	G	H	I	J	K	L
1	License Code	License Name	Action Type	Due Date	Category	Sub Category	Line Item	Start Date	End Date	Unit	Committed Amount	Actual Amount
2	802483	Blue Eagle Ext.	Work Filing	7-Jun-15	Exploration Activity						10,000,000	
3	802483	Blue Eagle Ext.	Work Filing	7-Jun-15	Exploration Activity	Drilling	Drill Program 1	1-Apr-14	1-Apr-15	USD		2,000,000
4	802483	Blue Eagle Ext.	Work Filing	7-Jun-15	Exploration Activity	Geochemistry	Soil Sampling	1-Apr-14	1-Apr-15	USD		150,000

## Available Work Commitment Detail Importer Fields

- License Code
- License Name
- Action Type
- Due Date
- Category
- Sub Category
- Line Item
- Start Date
- End Date
- Unit
- Committed Amount
- Actual Amount

# Work Commitment Details Importer

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## Important to Note when Populating the Template:

- Work Commitment Details Importer Required Field(s):
  - License Code, Action Type, Due Date
- All other fields are optional, but:
  - If Sub Category is specified, Category is required
  - If Line Item is specified, Category and Sub Category are required

HINT: When updating existing actions, best practice is to conduct an action search and export the actions to excel to populate the excel template.



# Work Commitment Details Importer

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## Importing the Populated Template

- Similar to the Mixed Action importer steps, follow the prompts for the Action Importer,
- Select Connector – Work Commitment Details Importer
- Select either:
  - Overwrite existing details
  - Update existing details
- If updating actions that are already closed, indicate either:
  - Run business rules
  - Do not run business rules
- Continue following prompts.
- Upon Validation step, Validation Errors may be returned

# Work Commitment Details Importer

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## Common Validation Errors Include

- Type needs to be exactly like the Action Type name in your Flexi environment
- Ensure all required fields are populated
- Category and Sub-category lists need to match Flexi Look Up tables
- Date syntax must be valid in Flexi
- Unit must be a valid Work Commitment unit
- Committed Amount and Actual Amount must be valid in Flexi

# Work Commitment Details Importer

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- Fix any errors in the Template
- Re-save
- Re-import into Flexi
- Review results

# Work Commitment Details Importer

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# Document Importer

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- The Bulk Document Importer tool allows the user to upload documents into the system by means of an importer.
- These documents can be digital documents stored/located on:
  - UNC Document Upload
  - Link to UNC Document
  - Link to URL via a Web Address or Document Management System
- The template can be found on the Documents Search bar.

# Document Importer

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- UNC Document Upload
  - A document record is created in your Flexi database
  - Then uploaded to the Flexi database, Flexi File System, or SharePoint
- Link to UNC Document
  - Creates a document record in your Flexi database
  - It does **not** upload the document, simply creates a link
- Link to URL (either web-based DMS or Web URL)
  - Creates a document record in your Flexi database
  - It does **not** upload the document, simply creates a link

# Document Importer

- Download the Bulk Document Import Template

The screenshot displays the 'Documents > Search' interface. On the left, there are input fields for 'Title:', 'Author:', 'Keywords:', 'Reference Number:', and 'Description:'. On the right, there are dropdown menus for 'Linked To:', 'Document Type:', and 'Sensitivity:'. A 'SEARCH' button is located in the top right corner. Below the search filters, a 'New Search' link is visible. In the foreground, a 'Windows Internet Explorer' window is open, showing the URL 'http://online.flexicadastre.com/WorkDemo/Import\_FileUploader.aspx'. The page title is 'Import > Upload Data File'. It features '< BACK' and 'NEXT >' buttons. Below these, there is a text label 'Select data file to import:' followed by a file selection area containing a 'Browse...' button and a blue link labeled 'Download Import Template', which is circled in red. In the background, a 'Documents > Search' header is visible, and a 'SEARCH' button is circled in red.

# Document Importer

## Review the Fields available for data import

	A	B	C	D	E	F	G	H	I
1	Full Path	Title	Keywords	Type	Date Published	Sensitivity	Reference Number	Author	Original Stored At
2									
3									
4									
5									
6									
7									

## Available Document Importer Fields

- Full Path
- Title
- Keywords
- Date Published
- Sensitivity
- Reference Number
- Author
- Original Stored At
- Description
- Linked To
- License Code
- Agreement Code
- Group Name
- Group Type
- Person First Name
- Person Surname
- Company Name
- Action Type
- Action Due Date
- Linked To Look up



# Document Importer

## Important to Note when Populating the Template:

- Document Importer Required Field(s):
  - Full Path, Title
- When selecting Linked To Agreement, only required to

	A	B	C	D	E	F	G	H	I	J	K
1	Full Path	Title	Keywords	Type	Date Published	Sensitivity	Reference Number	Author	Original Stored At	Description	Linked To
2	C:\Temp\CA_UC_Demo1.docx	CA_Demo_UC_1						Julie Robinson			Agreement
3	C:\Temp\COL_LodeMiningClaim1.pdf	Lode Mining Claim 20-April-2015						Julie Robinson			Agreement
4	C:\Temp\COL_LodeMiningClaim2.pdf	UC Lode Mining Claim 2						Mike Baumgartner			Agreement
5	C:\Temp\COL_LodeMiningClaim3.pdf	Lode Mining Claim 3						Felipe Allegretti			Agreement
6	C:\Temp\COL_LodeMiningClaim4.pdf	Lode Mining Claim 4						Felipe Allegretti			Agreement
7											

# Document Importer

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## Importing the Populated Template

- From the available drop down lists when importing, select:
  - Method from two options, Upload or Link to existing
  - Source Repository, from URL or UNC Path
  - Target Repository from three options, FlexiCadaastre database, FlexiCadaastre File System, or SharePoint
- If you select Link to Existing, you will only be able to select the Source repository
- When documents uploaded to SharePoint, the user will be asked to specify the location of the documents within SharePoint

# Document Importer

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## Common Validation Errors Include

- Path needs to be directing to the correct location
- Review if your path or names have special characters
  - For example: @, - , #. \$, %
  - Currently these will create an error
- Check the Date syntax

# Document Importer

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# Bulk Productivity Importers

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