# WellEz Information Management, LLC

## Excel Import Guide

# Using the Excel Import Tool

We have the ability to import data directly from excel spreadsheets into designated forms in WellEz.
**Note: This feature only works for input forms with repeatable fields – meaning add/remove buttons are available.**

## Step 1

### Opening the Input Form

First navigate to the input form that you would like to import data to. This must be an input forms that contains repeatable fields where add/remove buttons are available. In this example, we will upload data into the Survey input form.



Once you are in the form you will notice an Import button at the top left of the form. If this import button is not available please contact WellEz support to have it enabled for the page.

## Step 2

### Uploading your Excel files

After clicking on the Import button, you will be prompted to select the Excel file you want to import. Only Excel files type .xls & .xlsx are supported. Click "Choose File" to choose the file you want to upload into the system. Navigate to the location of your Excel file and click open to start the upload process.

## Step 3

### Mapping in the Excel Import Designer



The system will upload your Excel file into the Import designer. Here we will map which data we want to import by linking the data in the excel file to the correct fields in WellEz.

1. Check that the correct worksheet is active. The tool will open the first worksheet in the Excel workbook by default, if your data exists on a different worksheet please select the correct worksheet from the pick list. **(Highlighted in above picture)**

2. Next define the range of rows were our data exists. In the below example the data starts on Row 11 and ends on Row 23. Note* The Excel Import tool will automatically default to the last row with data. **If this is not updated you will receive an error when importing, ONLY enter the range of rows that have data skip any header rows on information at the top. (Highlighted Above)**

3. You may check the "Overwrite existing data" box if needed.

4. Next click on each pick list and assign the item in the pick list that matches the data that should be imported.

**Warning: You can only assign one field to one column**

## Step 4

### Starting the import process

Once you have completed assigning your fields, start the import process by clicking the Start Import button.

(Shown on previous page)



Once the import tool has completed, the page will refresh and take you back to your input form. The data you selected will now be imported into your input form, as seen above. **You MUST save your data by clicking on the "Save" or "Save & Exit" button.**