

Helpful Hints for Modeled Sheet Import: Overview and Troubleshooting

MODELED SHEET IMPORT

OVERVIEW

Modeled sheets only exist in plan versions. Common examples of a Modeled sheet include Personnel Sheet, Capital Sheet and Sales Sheet.

There are two key differences between the Modeled sheet import and Standard and Cube sheet imports:

- With the Modeled sheet import, you will not have the opportunity to map plans or dimensions. Therefore, the data in the **required** template fields must match exactly with the data as it exists in the Modeled sheet.
- **The data on the Modeled Sheet Import template is not appended to the existing data in the sheet. The data on the template overwrites ALL of the existing data on the sheet for ALL plans.**

STEPS TO IMPORT DATA

- Obtain output file/report with the data for the Modeled sheet.
- Download the import template from Adaptive Planning. The Modeled sheet import template is customized for the specific sheet to which you are importing data.
- All *Required* fields must be populated on the template. If you do not want to make a selection in a dimension field, populate "Any" in the template. If you are unsure what the acceptable entries are for the required fields, open the sheet and review the options in the dropdown lists.
- Once your template is ready to upload, save the file to a convenient location on your computer.
- Make sure that you select the appropriate version in the version selector.
- Browse for the template file, select and upload.

USE A PRINTABLE VIEW AS AN IMPORT TEMPLATE

Often, a client will want to perform an import that adds data to the existing data in a sheet. Because of the nature of a modeled sheet import, we must export the existing data from sheet, populate the data into the template, and add the new data into the template. To make this process more efficient, the printable view of the sheet can be used as an import template:

- (1) Go into the sheet at the Corporate Plan level and click the printable view button (this is the button with the printer on it in the toolbar). All of the data on the sheet for all plans is exported to an Excel file.
- (2) The printable view file can be edited, ie. add new rows to the file, and/or edit existing rows.
- (3) Follow the steps to import data just as if you were using the template that you download from the Import screen.

TROUBLESHOOTING ERRORS

If you receive an error upon import, try the following steps:

- (1) **Convert all values in Number columns to the Number category in Excel. Do the same for timespan values. Note: The Accounting category often causes errors.**
- (2) **Convert all values in Date columns to the Date category in Excel.**
- (3) **Convert Text columns to the Text category in Excel; the General category should work as well.**
- (4) **Delete all columns and rows outside of the data area.**
- (5) Check to see if there are frozen panes in the file. If so, unfreeze them.
- (6) Remove any filters.
- (7) Remove any conditional formatting.
- (8) Remove macros
- (9) Copy all data and paste special as values into the file. If this does not work, try pasting it into a new template.
- (10) If the sheet is password protected, remove the password protection.
- (11) Check to see if all of the dimension values in the import file have been made available in the modeled sheet builder.

*This document is intended as a quick reference tool. If you would like additional information about the import process, see the Importing and Exporting Data guide. Here is the link to the **Importing and Exporting Data** guide:*
<http://www.adaptiveplanning.com/docs/Training/Importing%20and%20Exporting%20Data.pdf>