

# Helpful Hints for Structure Import:

## *Frequently Asked Questions and Troubleshooting*

### FAQs

#### **What is Structure Import?**

Structure Import refers to the ability to import the Plans Structure, Accounts Structures (GL, Custom, Metric, and Assumptions) and Dimension Structure. **It is intended only for use during the implementation phase of a project.**

#### **Where do I go to import structure?**

This depends on the part of the model you are adding:

- Plans Structure Import = Manage Plans Screen
- Accounts Structure Import = Manage Accounts Screens
- Dimension Import = Define Dimensions Screen

There is a link in the top right corner of each of these screens where you can download and import the templates.

#### **Why do I not see the structure import links?**

By default, the structure import functionality is turned off in all models. In order to see the links, you must either update your existing role or create a new role and select the **Structure Import** permission. Once you make this update, you have to log out of the application and back in to see the change.

#### **Can I use structure import to quickly create additional accounts or plans in my model?**

No, by its nature, the Structure Import functionality will delete the existing structure and then populate the data from the template. In other words, it does not append information to your existing structure. If there is data (formulas and values) input for plans or accounts, all data will be lost. This is why it is turned off by default and why we stress using it only for implementation.

The exception to this rule is importing new dimensions. You can use the structure import functionality to add new dimensions to your model without affecting any existing dimensions.

#### **Do I have to import all plans or all accounts at once?**

You have to import all elements of a particular structure at the same time. The imports cannot be done in pieces. This means that all plans have to be imported together, all GL accounts must be imported at the same time, and the same is true for the other account types (Custom, Metric, and Assumptions). If you have not added data to the accounts, you can always make corrections and re-import your template. If you realize that you need to add new accounts or plans after your model is fully functional, you can always manually add the accounts or plans.

### IMPORT STEPS

- (1) Click on the Structure Import link in the top of screen (Manage Plans screen, Manage Accounts screen, or the Define Dimensions Screen).
- (2) Download the Template
- (3) The import templates contain two tabs. The first tab contains the instructions and examples and the second tab is where you populate the data.
- (4) Populate the second tab of the template
- (5) Save the template to your computer
- (6) Click **Browse...**, locate and select the template
- (7) Click **Upload**

### TROUBLESHOOTING

There are two types of errors that a user may encounter:

- 1) The user receives an error message and link to an Excel file with an *Error* that explains specific errors within the template. In this scenario, the user should go through the error file and correct all of the errors specified in the Excel file and reattempt the import.
- 2) The user receives the "An error has occurred processing your request" message. If you receive this message, here are a few things to try:

#### **Account Import**

- Verify that the root accounts specified in the template match the **account name** in the Manage Accounts screen.
- Make sure that the case for root accounts in the template is an exact match with the case in the Manage Accounts screen.
- Look for any duplicate account names or codes in your template. Although you can manually add accounts with the same name, the import functionality does not allow it.

#### **Dimension Import**

- The dimension name should not contain any spaces or special characters, but it is ok for dimension values to contain spaces and special characters.
- Make sure that there are not any duplicate dimension names or values in the template

If you have gone through these steps and continue to get an error, try deleting your structure by importing one row into your model and then re-attempt the import. If the import is still not successful, contact [support@adaptiveplanning.com](mailto:support@adaptiveplanning.com).

If you would like additional information about Structure Import, see the following video:

<https://adaptiveplanning.webex.com/adaptiveplanning/lsr.php?AT=pb&SP=MC&rID=40787002&rKey=2541FB03E4615054>