Using the Import Template Reports

There are four reports in 25Live which are designed for use with the Series25 Data Import Tool. These reports generate a spreadsheet formatted like the same template used in the import process, pre-filled with basic details about your data in 25Live. These reports can be useful for tasks like:

- Providing more details on locations created by LYNX
- Re-inventorying all locations in a building
- Updating contact records with internal IDs
- Standardizing naming conventions on locations, resources, or organizations

...or any other task which requires updates to large numbers of objects in Series25.
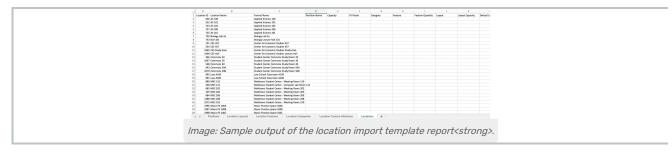
> ⚠️ **Convert from .xml to .xls or .xlsx**
>
> The extension for the file produced by the report is .xml. The file can be opened by Excel or any other spreadsheet application, but in order to use the template with the Import Tool, you must convert it to a different format. Use **File > Save As** to save the template as .xls or .xlsx.

Sample Report Output

The report is the same as the templates that can be downloaded directly from the Import Tool. It contains all the contacts, locations, organizations, or resources returned by a 25Live search. Only the Name and Database ID fields are included. The rest of the template is left blank for you to fill out with any desired additions.

Image: Sample output of the location import template report<strong>.

To Prepare an Import Template Using the Report

1. Choose a Report

Choose one of the following four reports to run from the Other Reports section:

- Import Tool Template - Contacts - Excel
- Import Tool Template - Locations - Excel
- Import Tool Template - Organizations - Excel
- Import Tool Template - Resources - Excel

Open the report file in a spreadsheet application like Excel.

2. Update the File Extension

Change the file extension on the report from .xml to .xls or .xlsx using **File > Save As** in the spreadsheet application.

3. Complete the Template

Complete the template according to the normal instructions for that import type.

4. Upload

Run the import process to **upload** your changes to 25Live.