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BOOST SOLUTIONS Excel Import App User Guide

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BOOST SOLUTIONS Excel Import App

Copyright

Introduction

SharePoint Excel Import App allows business users to import any Excel spreadsheet (.xlsx, .xls, or .csv file) into a SharePoint Online list and map data fields manually or automatically.

Using Excel Import App, users can import data to most built-in types of SharePoint columns, including Single Line of Text, Multiple Lines of Text, Choice, Number, Date and Time, Currency, People or Group, Lookup, Yes/No and Hyperlink or Pictures.

This user guide is used to instruct user on how to use this app.

For the latest copy of this and other guides, please visit:

http://www.boostsolutions.com/download-documentation.html

How to Use Excel Import App

Import a Spreadsheet

To import a Spreadsheet, you must have at least Add Items and Edit Items permissions in the list or be a member of the SharePoint Online group who has Add Items and Edit Items permissions in the list.

- Enter the list that you want to import a spreadsheet into. (Enter the specific folder, you can import aspreadsheet to the folder.)

- Click Import Excel in the top action bar. (Import Excel is unavailable in classic SharePoint experience.)

- In the Excel Import dialog box, in Import from Spreadsheet section, drag the Excel file you intend to import to the dotted box area (or click Drag and drop or click here to select an Excel file to choose an Excel or CSV file).

Import from Spreadsheet

Specify the location for the spreadsheet you want to use as the basis for this list.

Drag and drop or click here to select an Excel file.

All Orders.lsx (10.5 kB)

- Once the Excel file is uploaded, the sheets included will be loaded and available for import. In the Sheet section, select a sheet which you want to import.
  Use the Option Skip header row in Excel to decide whether or not to import the first row. This option is enabled by default and can be manually disabled if you don't have field titles in the first row or if you do not want to use the first row as field titles.

Sheet

Select one sheet which you want to import.

Orders

☑ Skip header row in Excel

- In the Column Mapping section, select the columns in Excel and map them to list columns.
  By default, the columns with the same name will be automatically mapped whenever a sheet is loaded.
  Additionally, required columns will be marked with a red asterisk and selected automatically.

Column Mapping

Specify column mapping between Excel Sheet and the list.

List Columns:	Excel Columns:
Order ID*	Order No.
Customer	Customer
Product	Product
Purchased Date	Purchased Date
Unit Price	Unit Price
Quantity	Quantity
Paid or not	Paid or Not
Saler	Saler

- In the Filter section, select the data range and import the data you need. If you deselect this option, all rows in the Excel sheet will be imported.

Filter

Enter the row range of selected Excel Sheet to import. If not checked, all rows will be imported.

☐ Import from ____ to ____ (Total rows:11)

If you select the checkbox next to Import from [] to [] option, and specify the data range such as from row 2 to 8, then only the specified rows will be imported to the list.

Filter

Enter the row range of selected Excel Sheet to import. If not checked, all rows will be imported.

☑ Import from 2 to 8 (Total rows:11)

- In the Import Options section, specify if you want to update SharePoint list using an Excel file.
  For first-time import, it is unnecessary to select this option.

But if you have already imported data before, you may need to decide what action should be taken if duplicates are found when importing Excel to SharePoint.
Before doing this, you need to enable the Check duplicate records when importing option.
Duplicate records can exist in both SharePoint list and Excel Sheet. In order to check duplicate records, a Key has to be specified to identify duplicate records.
A key column is one that uniquely identifies records between Excel and SharePoint list (like an ID column). You can specify more than one key columns.

Note
Only columns which have been selected in the Column Mapping section can be utilized as a key column.
These columns can be set as Key columns: Single line of text, Choice, Number, Date and Time, Currency and Yes/No.

Once the Check duplicate records when importing option is enabled, there are two actions that can be taken if any duplicates are found when importing Excel to list.

- Skip duplicate records

  Excel Import App compares values of key column in Excel and SharePoint Online list, if the values are same on both sides, the records will be identified as duplicate.

  Data which has been identified as duplicate records in an Excel spreadsheet will be skipped when importing and only the unique records remaining will be imported.
- Update duplicate records

  Excel Import App compares values of Key column in Excel and SharePoint Online list, if the values are same on both sides, the records will be identified as duplicate.

  For the duplicate records, Excel Import App will update information in the duplicate records in the SharePoint Online list with the corresponding information in the Excel spreadsheet. Then, the remaining data of spreadsheet will be regarded as new records and imported accordingly.
  Note
  If the key column is not unique in Excel or list, the duplicate records will be skipped.

For example, supposed you have set the Order ID column as key:

If there are multiple records in Excel with the same value of Order ID column, these records will be identified as duplicate and skipped.

If there are multiple records with the same value of Order ID column in list, the records in the list will be identified as duplicate and skipped.

- And then click the Import button.
- After the importing process finished, you can see the import results as following. Click the Close button to exit.
-

The in the list, you will find that all the records of Excel file have been imported into the list as following.

Supported SharePoint Column Types

Most popular SharePoint columns are supported by Excel Import App, including Single Line of Text, Multiple Lines of Text, Choice, Number, Date and Time, Currency, People or Group, Lookup, Yes/No and Hyperlink or Pictures. You can map Excel columns to these SharePoint columns when importing an Excel file.

However, for some column types, there are some tips you need to take care of:

Choice
Choice column is a built-in SharePoint Online column with predefined values, to import values into this column type, you need to check and make sure the value and case are same in Excel and list.

To import multiple values into a Choice column, the values should be separated by comma ",".

For example, the values of Category column must be separated by "," as following, then they can be imported successfully.

A	B	C	D	E	F
Work Item	Category	Progress	Priority	Start Date	Due Date
Prototype design	Planning,Research	Completed	Critical	September 12, 2021	September 22, 2021
UI design	Design,Research	Completed	High	September 20, 2021	September 30, 2021
Iteration 1	Engineering	Completed	Medium	September 30, 2021	October 15, 2021
Iteration 2	Engineering	In progress	Low	October 15, 2021	October 30, 2021
Iteration 3	Engineering	Not started	Critical	October 30, 2021	November 15, 2021
Iteration 4	Engineering	Not started	High	November 15, 2021	November 30, 2021
Iteration 5	Engineering	Not started	Medium	November 30, 2021	December 15, 2021
Product acceptance	Engineering	Not started	Low	December 15, 2021	December 20, 2021
Launch	Marketing,Planning	Not started	Low	December 20, 2021	December 5, 2021
Promote	Marketing,Planning	Not started	Low	December 5, 2021	December 30, 2021

Work Items Tracker ☆

Work item	Category	Progress	Priority	Start date
Prototype design	🗓Planning ⚡Research	Completed	⊘ Critical	September 12...
UI design	🖐Design ⚡Research	Completed	↑ High	September 20
Iteration 1	↗Engineering	Completed	Medium	September 30
Iteration 2	↗Engineering	In progress	↓ Low	October 15
Iteration 3	↗Engineering	Not started	⊘ Critical	October 30
Iteration 4	↗Engineering	Not started	↑ High	Today
Iteration 5	↗Engineering	Not started	Medium	November 30
Product acceptance	↗Engineering	Not started	↓ Low	December 15
Launch	🗓Marketing 🗓Planning	Not started	↓ Low	December 20
Promote	🗓Marketing 🗓Planning	Not started	↓ Low	December 5

Lookup Column

To import value to a SharePoint Lookup column, it requires the value be a text or a number. It means selected column of In this column should be a Single line of text or Number column.

Get information from:

Cases

In this column:

Case ID ⌄

☐ Allow multiple values

If you plan to import multiple values into a Choice column, the values should be separated by ";".

For example, the values of Related Cases column must be separated by ";" as following, then they can be imported to a Lookup column successfully.

A	B	C	D
Case ID	Case Status	Assigned To	Related Cases
CAS-12T2DF-001	Closed	Alex Wilber	CAS-12T2DF-006
CAS-12T2DF-002	Closed	Megan Bowen	CAS-12T2DF-005;CAS-12T2DF-014
CAS-12T2DF-003	Closed	Lynne Robbins	CAS-12T2DF-001
CAS-12T2DF-004	Closed	Adele Vance	
CAS-12T2DF-005	Deferred	Adele Vance	
CAS-12T2DF-006	Cancel	Alex Wilber	CAS-12T2DF-003;CAS-12T2DF-014
CAS-12T2DF-007	Cancel	Lynne Robbins	
CAS-12T2DF-008	Deferred	Adele Vance	CAS-12T2DF-005;CAS-12T2DF-014
CAS-12T2DF-009	Closed	Alex Wilber	
CAS-12T2DF-010	Closed	Lynne Robbins	
CAS-12T2DF-011	Closed	Adele Vance	
CAS-12T2DF-012	Open	Alex Wilber	CAS-12T2DF-006
CAS-12T2DF-013	Open	Adele Vance	
CAS-12T2DF-014	Open	Adele Vance	CAS-12T2DF-005;CAS-12T2DF-008;CAS-12T2DF-014

Cases ☆

Case ID ∨	Case Status ∨	Assigned To ∨	Related Cases ∨
CAS-12T2DF-001	Closed	Alex Wilber	CAS-12T2DF-006
CAS-12T2DF-002	Closed	Megan Bowen	CAS-12T2DF-005 CAS-12T2DF-014
CAS-12T2DF-003	Closed	Lynne Robbins	CAS-12T2DF-001
CAS-12T2DF-004	Closed	Adele Vance	
CAS-12T2DF-005	Deferred	Adele Vance	
CAS-12T2DF-006	Cancel	Alex Wilber	CAS-12T2DF-003 CAS-12T2DF-014
CAS-12T2DF-007	Cancel	Lynne Robbins	
CAS-12T2DF-008	Deferred	Adele Vance	CAS-12T2DF-005 CAS-12T2DF-014
CAS-12T2DF-009	Closed	Alex Wilber	
CAS-12T2DF-010	Closed	Lynne Robbins	
CAS-12T2DF-011	Closed	Adele Vance	
CAS-12T2DF-012	Open	Alex Wilber	CAS-12T2DF-006
CAS-12T2DF-013	Open	Adele Vance	
CAS-12T2DF-014	Open	Adele Vance	CAS-12T2DF-005 CAS-12T2DF-008 CAS-12T2DF-014

Person or Group Column
To import names to a SharePoint Person or Group column, the user's name in Excel should be a login name, display name or email address; if you need to import multiple values to this column, the values should be separated by ";".
For example, the display name or email address as shown in the figure below can be successfully imported into

Order No.	Customer	Product	Purchased Date	Unit Price	Quantity	Paid or Not	Salers
ORD-4521001	Diff Inc	ADS	1/20/2021	1000.00	1	Yes	Adele Vance
ORD-4521002	Anton	ADA	1/25/2021	980.00	1	Yes	Alex Wilber
ORD-4521003	Dottm	DOCSHAR	1/28/2021	850.00	2	Yes	Lee Gu;Alex Wilber
ORD-4521004	KADANT	DOCVIEW	2/3/2021	790.00	2	Yes	Grady Archie
ORD-4521005	A&C	ADIS	2/12/2021	1050.00	1	Yes	AdeleV@bsmark.onmicrosoft.com
ORD-4521006	Keep, Inc.	PRINTER	2/25/2021	1200.00	1	No	Alex Wilber
ORD-4521007	Shareit Co.	DOCSHAR	2/26/2021	850.00	2	No	Lee Gu; Adele Vance
ORD-4521008	CAST	DOCVIEW	3/2/2021	790.00	2	Yes	Grady Archie
ORD-4521009	ABB	PRINTER	3/8/2021	1200.00	1	No	Alex Wilber
ORD-4521010	Lydell	ADS	3/16/2021	1000.00	1	Yes	Lee Gu

Orders ☆

Order ID	Customer	Product	Purchased Date	Unit Price	Quantity	Paid or not	Saler
ORD-4521001	Diff Inc	ADS	1/20/2021	$1,000.00	1	✓	Adele Vance
ORD-4521002	Anton	ADA	1/25/2021	$980.00	1	✓	Alex Wilber
ORD-4521003	Dottm	DOCSHARE	1/28/2021	$850.00	2	✓	Lee Gu Alex Wilber
ORD-4521004	KADANT	DOCVIEW	2/3/2021	$790.00	2	✓	Grady Archie
ORD-4521005	A&C	ADIS	2/12/2021	$1,050.00	1	✓	Adele Vance
ORD-4521006	Keep, Inc.	PRINTER	2/25/2021	$1,200.00	1		Alex Wilber
ORD-4521007	Shareit Co. Inc.	DOCSHARE	2/26/2021	$850.00	2		Lee Gu Adele Vance
ORD-4521008	CAST	DOCVIEW	3/2/2021	$790.00	2	✓	Grady Archie
ORD-4521009	ABB	PRINTER	3/8/2021	$1,200.00	1		Alex Wilber
ORD-4521010	Lydell	ADS	3/16/2021	$1,000.00	1	✓	Lee Gu

Appendix 1: Subscription Management

You can use Excel Import App trial subscription for a period of 30 days since the day you first use it.
If the trial subscription period ends, you will need to buy a subscription.
The subscription of Excel Import App is per site (previously called "site collection") or tenant annually.
For site collection subscription, there are no end-user limitation. All users in site collection can access the app.
For tenant subscription, there are no sites or site collection limitation. All users can access the app in all sites or site collections within the same tenant.

Checking Subscription Status

- When you open Excel Import dialog, the subscription status will be shown on the top of the dialog.

  When the subscription is about to expire within 30 days, the notification message will always show the days left.

  Excel Import   ✕

  Import an Excel spreadsheet (.xlsx, .xls, .csv) to a SharePoint list.

  Your subscription will expire in 24 days

- To update the subscription status, please put the mouse on the notification message and click it, then the new status will be loaded.

If the subscription status does not change, please clear the cache of browser and click again.

- Once the subscription status turns to Your subscription is invalid as following, it means that your subscription has expired.
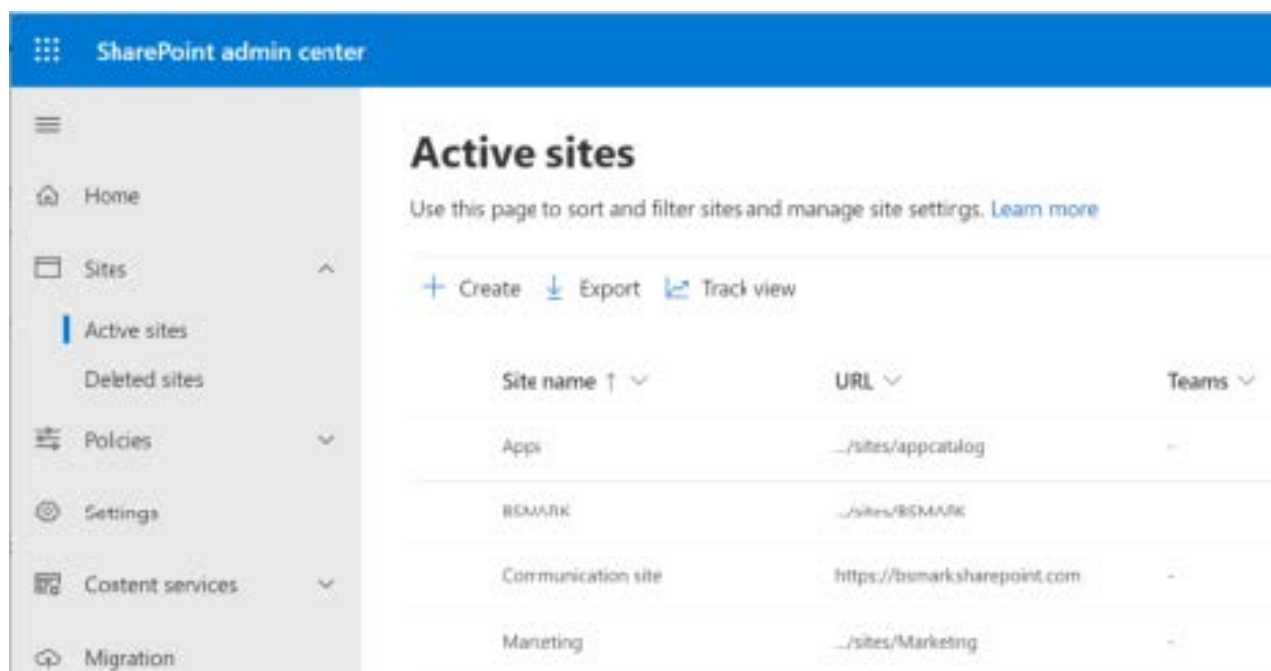

- Please send us (**sales@boostsolutions.com**) the site URL to proceed a subscription or renewal.

Finding Site Collection URL

- To get site (previously called site collection) URL, please go to the Active sites page of the new SharePoint admin center.

-

Click the site to open a window with site settings. In General tab, click Edit link and then you can get the site URL.

Marketing

General   Activity   Permissions   Policies

Site name   URL
Marketing   .../sites/Marketing
Edit   Edit

If your site URL changes, please send us the new URL to update the subscription.

Finding Tenant ID

- To get the tenant ID, please firstly go to the SharePoint admin center.
- From the SharePoint admin center, click on the More features link from left navigation, and then click on the Open button under Apps.
- In the Manage Apps page, click on the More features link from the left navigation.
- And then click on the Open button under App permissions.
- The App Permissions Page lists all apps, including the app display name and app identifiers. In the App Identifier column, the part after the @ symbol is your Tenant ID.
  Please send us (**sales@boostsolutions.com**) the tenant ID to proceed a subscription or renewal.

App Display Name	App Identifier
Dataverse	i0i.t]ms.sp.ext]00000007-0000-000O-c000-000000000000@ae586225-a936-4e32-b424-6a57e257cf0c
Office 365 Exchange Online	i0i.t]ms.sp.ext]00000002-0000-0ff1-ce00-000000000000@ae586225-a936-4e32-b424-6a57e257cf0c

Or you can find tenant ID through the Azure portal.
- Sign in to the Azure portal.
- Select Azure Active Directory.
- Select Properties.
- Then, scroll down to the Tenant ID field. You can find the tenant ID in the box.
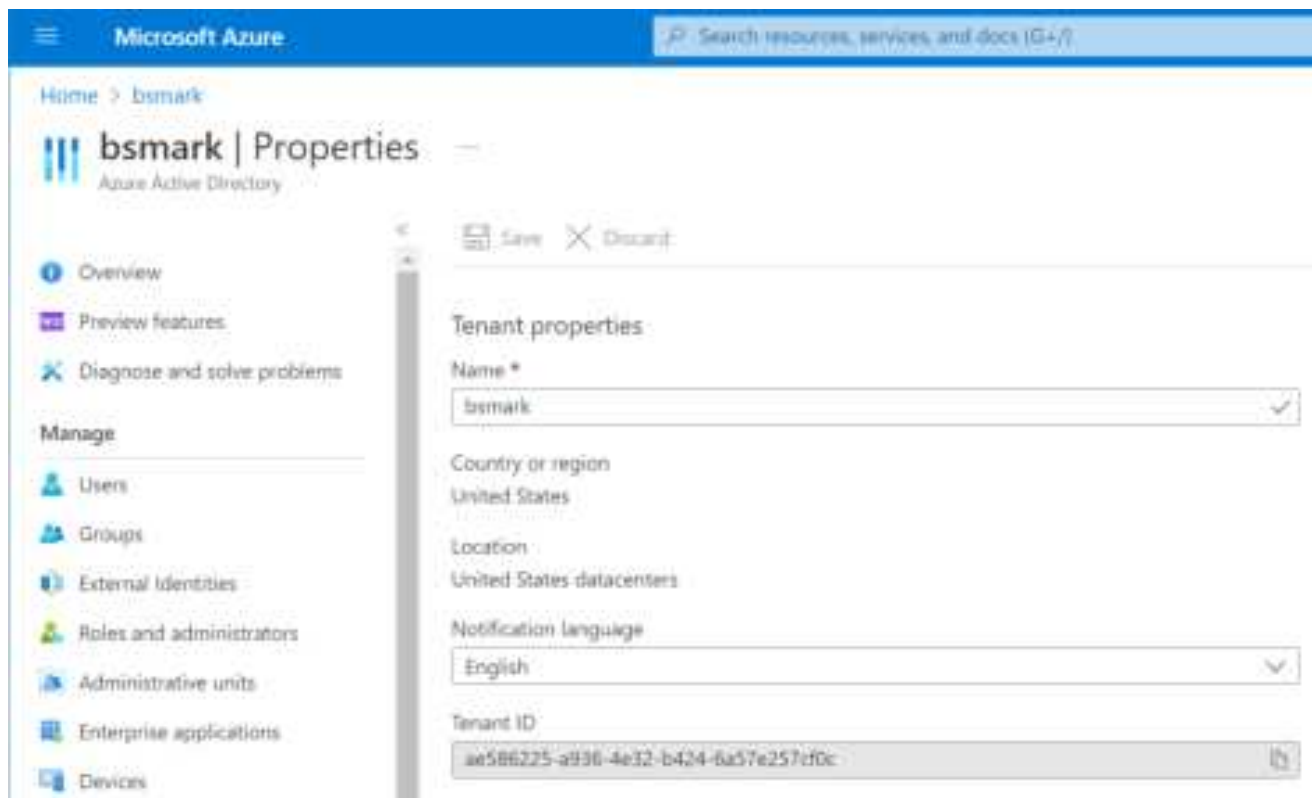
Documents / Resources

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