

Transcript of the How-To Import Video

Welcome to the Public Libraries Survey instructional video on how to import data files. Today's video is to show you how to import data into the PLS web portal. There are four types of files an SDC can upload into the Web Portal. They are an AE file (Administrative Entity file), an Outlet file, an Annotation only file, or an Edit Report/Annotated Edit Report.

So to get started we will go to TOOLS > Import Data. Currently we have no data imported for our Administrative Entities, Outlets or Annotations. To import a file select Browse, first import an AE file, and then click Upload and Import File. When this box appears it is very important that you select the correct file type. Because I am importing an AE file, I must make sure the Administrative Entity button is selected. The same goes for when importing an Outlet file, an Annotation file, and an Edit Report file, whether it be annotated or not. Once I have select the correct file type I will select, "Yes, Import File." All progress will be relayed in real time and once this file is imported you will either receive a message like this one saying the file successfully imported. Once an AE file is imported you must also import a new Outlet file for data integrity purposes. To import an Outlet file you will do the same as for the AE file. You will click Browse, find the file you wish to import, then select the Upload and Import File button. This time because it is an Outlet file I must select the Outlet file type button, and then "Yes, Import File." Again my file was successfully imported. Once files are imported they will be displayed here in the Files Currently Loaded box. When you import any files with the same file name it will overwrite any preexisting files with that same name.

If you accidentally go to import an Outlet file or an AE file as the wrong file type you will receive an error message. So as this is an Outlet file I am going to show what happens when you try to import it an AE file. You receive a message saying "Parser Errors Were Found." To look at these errors you can click the download errors button here and a new file will download and it can tell you or give you some light as to the information you need to fix the errors found.

However, if you try to import an AE or an Outlet file as an Annotation file type the file will pass and parse successfully. However, if you do this it will cause issues when you are attempting to run your Match and/or Edit Reports later on.

You can also see that because my AE file had the same name, but I imported it as an Annotation file type the file was overwritten and I now no longer have any AE data imported for my state.

To correct this issues I will go back into Browse, reimport my AE file, and correct my error. Because I have imported a new AE file, I must also import a new Outlet file or your data will be overwritten and it will cause Match and Edit Report errors.

There are only three file types accepted as imports. They are wither a text file (also known as .txt.), a comma delimited file (also known as .csv), or an Excel file (either .xls or .xlsx).

If you make a mistake and you import a wrong file with a different file name you can also use one of the three deleted buttons seen below the Files Currently Loaded files box. Selecting any of these buttons will either delete all of your AE data, delete all Outlet data files, or delete all Annotation files.

Once you have successfully imported an AE and an Outlet file you will then need to run your Match Report. To do so go to Reports and select Run Match Report. If you need assistance with your Match Report, please see our other videos.