



Uploading Multiple Contacts Using Excel

Administrators can upload multiple contacts or case patients at once using an Excel template:

Completing the Template

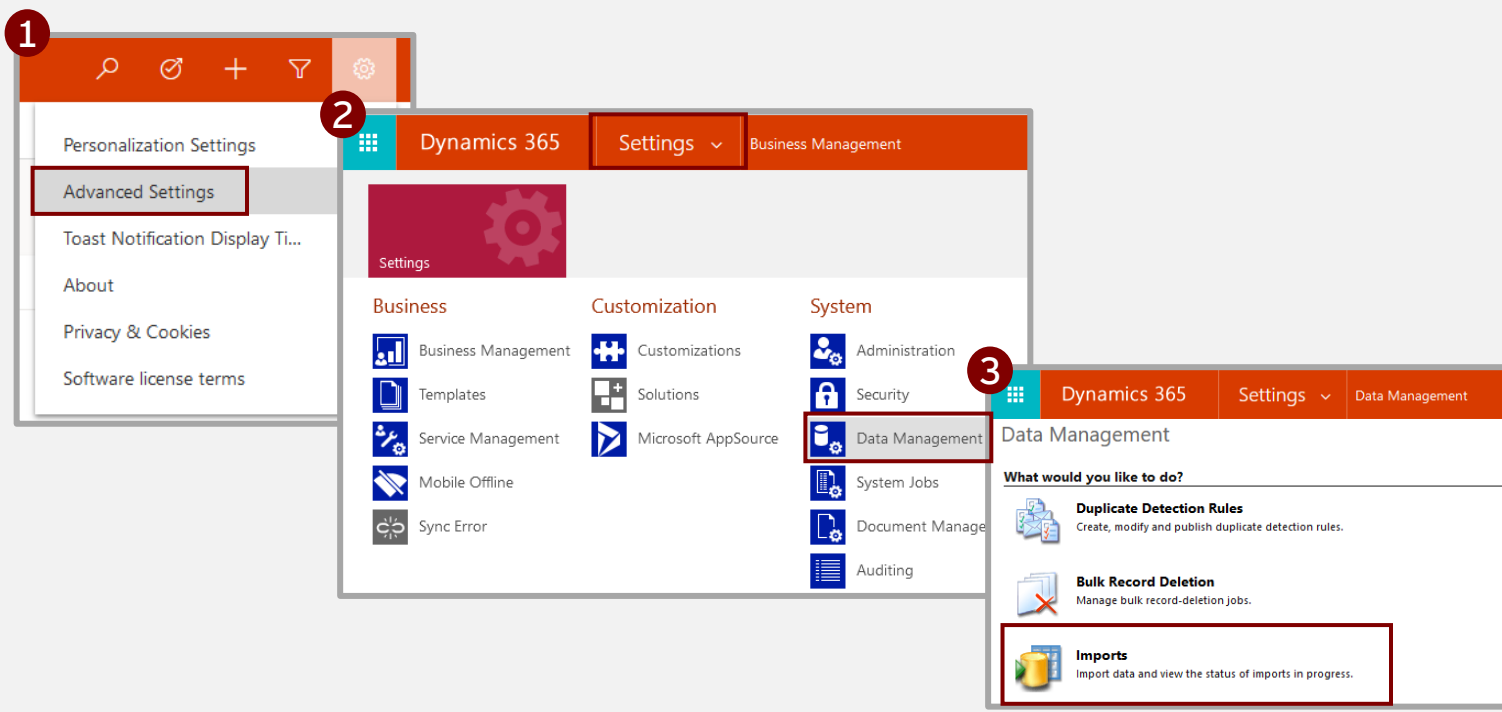
TO COMPLETE THE TEMPLATE:

- Under the **Contact Tracing and Movement and Monitoring** header in the [CD Manual](#), download the file under *Contact and Case Patient Import Template (Excel)*.
 - Fill out all information as appropriate using the [CCTO Glossary](#) as a guide, noting required fields (**First Name, Last Name, Contact or Case Patient, State, Last Date of Exposure, and County**) in red. Use the dropdowns provided for any fields that are not free text. **You do not need to complete all fields** and should leave unknown information blank.
- After you complete your changes, remember to **save this file as a .CSV**.
- *Any additional spaces or information in this template will be interpreted as blank contacts or errors by the system, so please use a new template for each set of contacts uploaded.*

Uploading the Template

This functionality is only visible to users designated as administrators within the CCTO Tool. Please note that we do not recommend using the “Import from Excel” button, as this will not allow you to see where errors have occurred.

1. Navigate to the gear icon in the top right corner and select “Advanced Settings.”
2. Click the dropdown arrow next to “Settings” at the top of the screen. In the menu that appears, select “Data Management.”
3. Select “Imports” to view the “My Imports” screen.





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4. Click "Import Data" at the top of the screen to open the Import Wizard.
5. Click "Browse" to upload your completed .csv template. Click "Next."
6. Click "Next."
7. Select "Default (Automatic Mapping)" from the Data Map list and then click "Next."
8. Select "Monitoring Event" from the dropdown and note that the "Success" message appears. Click "Next" and proceed to the data mapping process below.

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Dynamics 365 Settings Data Management

DELETE EMAIL A LINK EXPORT TO EXCEL **IMPORT DATA**

5 Upload Data File

Select a data file to import into Microsoft Dynamics 365.

Data file name:

Browse... Copy of Contacts and...load_8.18.21.01.csv

Supported file types: XML Spreadsheet 2003 (.xml), .csv, .txt, .xlsx, and .zip

Drag your file here

Next Cancel

6 Review File Upload Summary

The following data will be imported into Microsoft Dynamics 365.

1 file uploaded.

File Name	Size
Copy of Contacts and Cases Upload_8.18.21.01.csv	2 KB

Delimiter Settings

Back Next Cancel

7 Select Data Map

Before your data can be imported, it must be mapped to the data in Microsoft Dynamics 365. You can let the system map your data automatically, or you can select a data map to specify how your data will be imported.

System Data Maps

- Default (Automatic Mapping)
 - For Generic Contact and Account Data
- Data Maps for Salesforce.com**
 - For Contact and Account Report Export
 - For Full Data Export
 - For Report Export
- Data Maps for Microsoft Outlook Business Contact Manager**
 - For BCM 2010
- Customized Data Maps**
 - Contact!
 - Contact?
 - MMN Import 4/12/2021
 - MMN Import User Test 20210219
 - MMN Test Import 4.15.21
 - Wake Contact Import New 4.12.21
 - Wake County Import Template NEW
 - Wake County Template 4.12.21

Back Next Cancel

8 Map Record Types

Map the source data files to the target Microsoft Dynamics 365 record types. If a source file cannot be mapped to an existing record type, you can create a new record type or choose to skip importing the data.

The data files have been successfully mapped to the target Microsoft Dynamics 365 record types.

Source Data Files	Microsoft Dynamics 365 Record Types
Copy of Contacts and Cases Upload_8.18.21.01	Monitoring Event

Back Next Cancel



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Mapping & Submitting Your Upload

1. Confirm that the "Source Fields" from your .csv file have mapped as expected to the "Dynamics 365 Fields." Note that if the headers have been altered in any way, the information may not have mapped properly. Then, click "Next."
2. Click "Next" again on the screen that follows.
3. Under "Allow Duplicates," we suggest choosing "Yes." If you choose "No," any duplicates detected, such as people with a last name or birth date already present in the system, may not be uploaded.
4. Set an owner as appropriate.
5. If you wish, you can add a name for your data map to save it as a default for future imports.
6. Click "Submit" and then "Finish" to close the window.

1

Map Fields Help

Select the Microsoft Dynamics 365 record type and map each source field to a target Microsoft Dynamics 365 field. We suggest that you map all the required fields before you click Next.

All the record types with fields have been successfully mapped.

Dynamics 365 Record Types	Source Fields	Dynamics 365 Fields
<input checked="" type="checkbox"/> Monitoring Event	Required Fields	Show All
	Contact or Case Patient	Contact or Case Patient ...
	First Name	First Name
	Last Name	Last Name
	State_Dropdown	State_Dropdown (Optio...
	Optional Fields	
	Address Line 1	Address Line 1
	Address Line 2	Address Line 2
	City	City
	Country Code	Country Code
	County	County (Lookup)
	COVID-19 Test Result	COVID-19 Test Result
	Create Person?	Create Person? (Two C...

2

Back **Next** Cancel

Review Settings and Import Data Help

Review the default settings, make the necessary changes, and submit the data for import.

Allow Duplicates **3**

No

Yes

Duplicate records will be determined based on the duplicate detection settings in Microsoft Dynamics 365.

Select Owner for Imported Records **4**

Mary Moran

This user will own the imported records if the records do not contain owner information or if the records cannot be assigned to the specified owners.

Data Map Name (optional) **5**

Save this data map for future imports.

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Back **Submit** Cancel



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Reviewing Import Results

1. After clicking "Finish" to close the window, your new upload will be immediately visible in the "My Imports" Screen.
2. Note the status column. If the file is large, you may need to refresh the page until the status reads "Completed."
3. If any errors occur, they will appear as counts in the "Partial Failure" or "Errors" columns. If you notice a nonzero value in these columns, you can review what occurred by clicking on your upload.
4. Clicking on your upload produces a profile screen that will allow you to drill into failures, successes, and partial failures itemized on separate tabs.

1

My Imports ▾

Import Name	Status Reason...	Success...	Partial Failur...	Errors	Total Processed	Created On ↓	Created By
Copy of Contacts and Cases Upload_8.18...	Completed	1	0	0	1	8/18/2021 10:...	Mary Moran

2

3

4

Contacts Upload Template v1_Test.02.csv
Import Source File

General Failures **Success** Partial Failure Related

Name	Contacts Upload Template v1_Test.02.csv	Status	Completed
Created By	Mary Moran		
Created On	6/23/2020 3:40 PM	Finished On	6/23/2020

Properties

File	Contacts Upload Template v1_Test.02.csv
Record Type	contact
Records Owned By	Mary Moran

Results

Successes	1
Partial Failures	0

Contacts Upload Template v1_Test.02.csv
Import Source File

General Failures **Success** Partial Failure Related

Full Name ↑	Test Testing
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Administrators can upload multiple contacts or case patients at once using an Excel template:

- As an example, this screenshot shows an error that can occur if duplicate detection is not turned off and a new contact has the same full name as an existing contact. The new contact will not be uploaded. ***Please note that you should only attempt to re-upload records (monitoring events) that have failed and NOT the entire original file. Re-uploading the original file may result in duplicating successfully imported records.***
- Successfully uploaded records will appear normally in the Monitoring Events Tab, assigned to the owner you selected during upload.

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6.23 Upload Template_vTest.01.csv
Import Source File

General **Failures** Success Partial Failure Related

Import Logs Export Error Rows Run Report Search this view

✓	↑	Log Ph...	Description	Column He...	Column Val...	O	Source Row	Error Code	More Information
1		Import ...	---	---	---	4	...WillSmith,805 St. Cl	-2,147,220,685	A record was not created or updated because a duplicate of t...