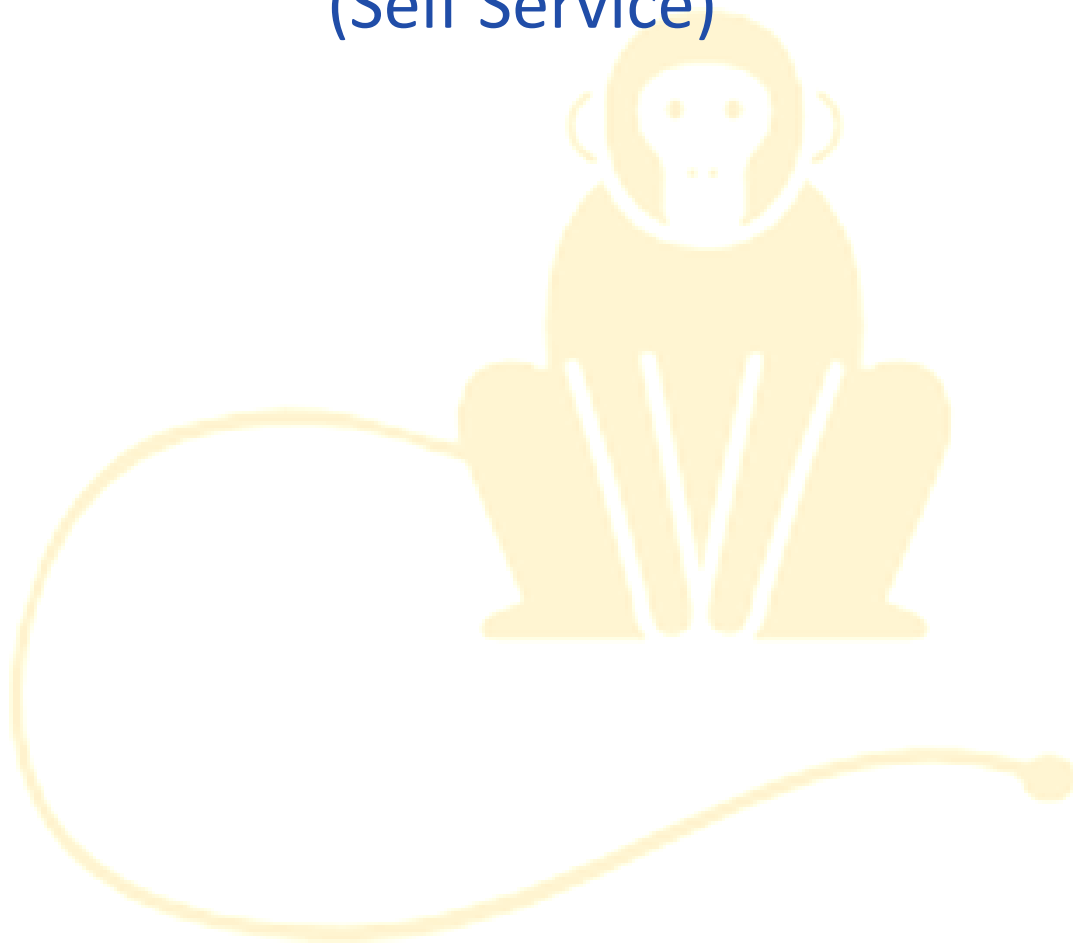




## Bulk Data Load Process (Self Service)



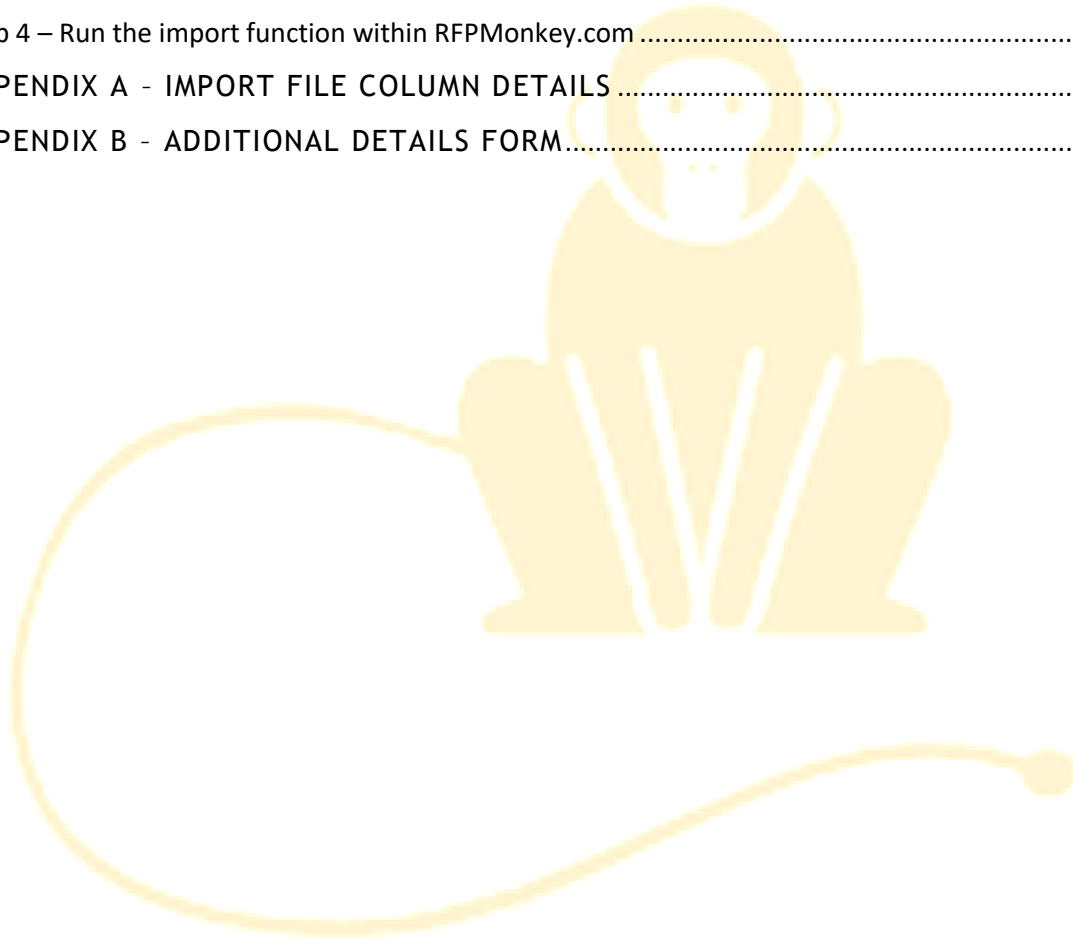
April 13, 2017



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## RFPMonkey Bulk Import Process

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**RFPMONKEY BULK IMPORT PROCESS**

**INTRODUCTION**

The normal way to enter new content into your RFPMonkey.com account is to use the Add Entry function. This is an efficient way to enter content on an ongoing basis. It is also the most common way to build up your initial repository.

Clients who have (or can get) their RFP questions and answers into the appropriate CSV format can load their content directly into their RFPMonkey repository in bulk. This is the fastest way to get your repository populated with several hundred entries or more.

Some customers perform repository refreshes by periodically exporting their content from RFPMonkey, performing updates to the content in the exported file, then reimporting the content back into the RFPMonkey database.

**PROCESS OVERVIEW**

The bulk data load process is fairly straight forward. The client puts their content into the prescribed format, and uploads it into the database. Getting your content into a CSV file is fairly easy if you have RFPs that were submitted as Excel files. Of course, it can be more work if the RFP(s) you are using for your initial data load are in Word format. (Even worse if they are in PDF files.)

The bulk import process will attempt to either insert or update rows based on the value found in the entry\_id column within the data file. If the entry ID is blank or 0, RFPMonkey will attempt an insert. If the entry ID is greater than 0, RFPMonkey will attempt to update the existing row with that entry ID.

**Step 1 – Create a spreadsheet with your content**

Make an Excel spreadsheet that looks like the image below. You must include the row of column headers (row 1), and the column headers must match those in the supplied *RFPMonkey\_Sample\_Import* file, EXACTLY. Make sure that each header is in all-lower-case, has the underscore (\_) in exactly the same locations, and exactly matches the spelling. Note that some column headers are plural (comments, other\_key\_words), and others are singular.

The import function is strict about adherence to the required format. If the column headings are even slightly incorrect, the file will be rejected. So slow down, read carefully, double check your work.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
1	entry_id	division	category	sub_category	product	version	question	response	comments	other_key_words	source	source_proj_id	comp_diff	std_template	trusted_only	
2	0	RFP Knowledgebase	Business	Company Info	RFPMonkey		Is it user friend	RFPMonkey.com		graphical ui GUI			0	0	1	0
3	0	RFP Knowledgebase	Info Sec	General Info	RFPMonkey		Describe how	controlled by	This entry does not	roles			0	0	1	0
4	0	RFP Knowledgebase	Info Sec	General Info	RFPMonkey		Is a password	n/Yes	PW strength is config	credentials			0	0	0	0
5	0	RFP Knowledgebase	Capabilities	Other	RFPMonkey		What is the ma	field is limited to	Key words are pure				0	0	0	0

Refer to Appendix A for further details about each column within the import file

**Step 2 – Save your spreadsheet as a .CSV file**

RFPMonkey.com can't import a native Excel file. You must save it as a .CSV file to be used with the bulk import process. Use the Save As function in Excel and choose 'CSV (Comma delimited)' as the file type. CSV files (and other plain text files) are incompatible with certain things that would be normal in Excel spreadsheets (macros, formulas, most formatting). So when you save your file in CSV format, some of the content may not be exactly as it originally was in the Excel spreadsheet. You are responsible for the content that is loaded during an import, and any minor differences that can exist between an Excel file and a .CSV file, so for this reason, your data file has to be 100% compatible with our import process. If you submit a normal Excel file, it will be rejected.

**Step 3 – Provide Additional Details for your Import**

In addition to the data included in your .CSV file, there are several pieces of information that are vital to the import. To help you as you perform your import, print out *Appendix B – Additional Details Form* and complete the *Supplied Value* column of the form.

**Step 4 – Run the import function within RFPMonkey.com**

To access the import function, first click on *Import/Export* in the main menu, then on *Import Entries* in the sub-menu. (Note: you may not have been granted import permission.)

The import function is made up of several steps.


1. **Verify Permission** – To start the process, you must re-enter your password.
2. **Upload .CSV File** – Click  and select a .CSV file from your local hard drive. Then click .
3. **Verify Headings** – Your file is examined to make sure it has the required columns and column names. If the columns and headings are correct, each column will display a green check. A red X indicates errors that must be corrected. After correcting any errors, you will have to restart the process.

Expected Column Header	entry_id	division	category	sub_category	product	version	question	response	comments	other_key_words	source	source_proj_id	comp_diff	std_template	trusted_only
Actual Column Header	entry_id	division	category	sub_category	product	version	question	response	comments	other_key_words	source	source_proj_id	comp_diff	std_template	trusted_only
Match?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

4. **Verify Data** – This step reads your data file and validates required and recommended columns. It displays any errors in red, warnings in yellow, and any automatically-applied corrections in green. You may proceed with corrections and warnings, but cannot proceed if there are ANY errors.

entry_id	division	category	sub_category	product	version	question	response	col
		General Info	General	RFPMonkey		a. Describe how your firm (or affiliate) would conduct benefits administration for Fridley Public Schools.		
		Blank values are not advised for Division/Knowledge Type.						
27	Branch	General Info	General	RFPMonkey	2014		Yes	
0	RFP Knowledgebase		Biography			Where are you located?	We are headquartered in Tucson, AZ. Our mailing address is RFPMonkey.com LLC 2114 W. Grant Rd. Suite 177 Tucson, AZ 85745	
0	RFP Knowledgebase	Risk Management & Compliance	Legislation	Employee Benefits		a. Describe how you keep clients abreast of employment laws in a timely manner.	Employee benefits compliance is a constantly-changing responsibility of employers. Lack of compliance can leave an employer at risk for significant penalties and other costs. As a consulting organization aimed at preventing risk, MMA maintains an internal compliance team dedicated to monitoring regulatory and legislative changes that affect health and welfare benefit programs. MMA's standard compliance services include: • Compliance assessment of current programs • Ongoing legislative updates, including o Compliance Newsletters – help our clients stay abreast of industry-related trends, discussions and decisions, and released on a monthly basis	add ima



A log file of these errors, warnings, and corrections is available and can be printed to assist you as you correct any errors and warnings in the data file.

 **IMPORT LOG FILE** April 7, 2016, 3:23 pm  
1001040716152346ZDFZ.csv

Row/Col: 2A - Correction: entry\_id missing. Will be corrected.  
 Row/Col: 2B - Warning: Blank values are not advised for Division/Knowledge Type.  
 Row/Col: 2F - Warning: version is blank.  
 Row/Col: 2H - Warning: Response is blank.  
 Row/Col: 2N - Correction: std\_template is neither 0 or 1. Will be corrected.  
 Row/Col: 3A - Correction: entry\_id is not 0. Will be corrected.  
 Row/Col: 3B - Error: This division/knowledge type (Branch) is not defined in your Grouping.  
 Row/Col: 3F - Error: This version (2014) is not defined in your Grouping.  
 Row/Col: 3G - Warning: Question is blank.  
 Row/Col: 3L - Correction: source\_proj\_id missing. Will be corrected.  
 Row/Col: 3O - Correction: std\_template is not 0 or 1. Will be corrected.

5. **Set Batch Values & Launch** – After successfully validating your file and its data, you are presented with several fields whose values will be applied to each inserted row of your import. If you supply a *source* value on this screen, it will override EVERY source value in your file. Leave this field blank to use the *source* values as defined in your data file.

### User Input Values

org_id	<input type="text" value="041140505Y4"/>
source	<input type="text"/>
created_by	<input type="text" value="rfpmonkey_support"/>
created_date	<input type="text" value="2017-04-13"/> 
approved_by	<input type="text" value="rfpmonkey_support"/>
approved_date	<input type="text" value="2017-04-13"/> 
status	<input type="text" value="APPROVED"/>

## APPENDIX A - IMPORT FILE COLUMN DETAILS

The table below gives further details about each column in the import file.

CSV Column	Field Name	Instructions
<b>Column A</b>	entry_id	<p>Set to 0 to insert the row as a new entry. Import process will insert key values for each new entry as needed.</p> <p>Set to an existing entry ID to perform an update of the associated entry.</p> <p>If an update is attempted (because the entry_id is greater than 0) AND there is no existing entry with that ID, an error is reported, and no database action is taken for that row of data.</p>
<b>Column B</b>	division (Called Knowledge Type or Library within RFPMonkey.com)	<p>Populate with Division/Knowledge Type value. Division can be left blank, but will generate a warning during import if it is. If included, it must match a filter value defined within RFPMonkey.com.</p> <p>For additional information about filters, refer to the RFPMonkey User Guide.</p>
<b>Column C</b>	category	<p>Populate with entry category. Category can be left blank, but will generate a warning during import if it is. If included, it must match a filter value defined within RFPMonkey.com.</p> <p>For additional information about filters, refer to the RFPMonkey User Guide.</p>
<b>Column D</b>	sub_category	<p>Populate with entry subcategory. Subcategory is relative to category. Sub_category can be left blank, but will generate a warning during import if it is. If included, it must match a filter value defined within RFPMonkey.com.</p> <p>For additional information about filters, refer to the RFPMonkey User Guide.</p>
<b>Column E</b>	product	<p>Leave blank or populate with product to which entry relates. Product can be left blank, but will generate a warning during import if it is. If included, it must match a filter value defined within RFPMonkey.com.</p> <p>For additional information about filters, refer to the RFPMonkey</p>



User Guide.		
<b>Column F</b>	version	<p>Leave blank or populate with product version to which entry relates. Version can be left blank, but will generate a warning during import if it is. If included, it must match a filter value defined within RFPMonkey.com.</p> <p>For additional information about filters, refer to the RFPMonkey User Guide.</p>
<b>Column G</b>	question	Populate with the plain text of an RFP question. Question can be left blank, but will generate a warning during import if it is.
<b>Column H</b>	response	Populate with the response/answer to question in column G. Must be enclosed in quotes if response includes commas. This is done automatically by Excel if you save as .CSV. Response can be left blank, but will generate a warning during import if it is.
<b>Column I</b>	comments	Populate with comments if any. Plain text. Comments can be left blank.
<b>Column J</b>	other_key_words	Leave blank or populate with additional key words not already found in the question and/or response. Use space as delimiters.
<b>Column K</b>	source	Leave blank or enter data source (often prospect name associated with creation of the content). Set to the Prospect field from an associated Project if source_proj_id is not 0.
<b>Column L</b>	source_proj_id	Set to 0 or project id number of associated source project.
<b>Column M</b>	<b>comp_diff</b>	Set to 1 if this entry describes a competitive differentiator. 0 if not.
<b>Column N</b>	std_template	Set to 0
<b>Column O</b>	trusted_only	Set to 0

## APPENDIX B - ADDITIONAL DETAILS FORM

The following information will be required to complete your data load. These values will be applied to every entry being imported. Print this page, fill out the form, and have it on hand as you run through the import.

Field	Supplied Value	Notes
org_id		To be supplied by RFPMonkey during import.
source		Supply a <i>source</i> value IF you want to override the <i>source</i> values within your import file and set them ALL this this value. Leaving this value blank will cause the import to use the <i>source</i> values specified in your import file.
created_by		Specify which user to attribute as the author for the entries being loaded.
created_date		Specify the date you want to show as the <i>created_date</i> for the entries being loaded.
approved_by		This field only applies if you specify APPROVED for the <i>status</i> . Specify which user to attribute as the approver for the entries being loaded.
approved_date		This field only applies if you specify APPROVED for the <i>status</i> . Specify the date you want to show as the <i>approved_date</i> for the entries being loaded.
status		The only status option for imports performed directly through the user interface is APPROVED.