

## Ideas import template Rules and Sample

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*A downloadable PDF version is available at the bottom of the page together with the Excel import template.*

**Rules.** *(Required fields are marked with a Red background colour)*

Field Name	Description	Rules	Exception Handling	Values to be placed	Default Values	Field Type
IdeaNumber	This field contains the unique Number/Code of an Idea	Must be unique for non-deleted ideas, (can use the same IdeaNumber as a deleted idea). 1-20 characters.	If the records data exceeds 20 characters, the record will NOT be imported.		If the fields value is either blank or "NEW" then the number will be generated from the relevant department or subdepartments sequence which can be setup in the admin module.	Variable Character (20)
Title	This field contains the title of the idea.	Titles cannot be duplicated. Titles can contain alphanumeric characters.	Idea form titles cannot be duplicated. Idea titles must be unique in order for the idea to be imported.	N/A	N/A	Variable Character (200)
Owner	This field contains the owner of the idea.	The users need to be created on the system in order to be identified as owners of an idea.	This field can be blank, the record will be imported.	User	First user on the list of the system	Lookup (Users)
Facilitator	This field contains the facilitator of the idea.	The users need to be created on the system in order to be identified as facilitators of an idea.	This field can be blank, the record will be imported.			
Department	This is an indication of the department the idea will belong to.	The department selected must match up with the departments saved on the system.	If there is a spelling mistake, or the department selected on the import does not meet the departments saved on the system, the record will still be allowed to be imported onto the system. However the department field will be empty.	This will be determined by the users and the codes they associate to the Department. All codes will be unique.	The system will default to the first entry within the lookup.	Lookup (Departments)
SubDepartment	This is an indication of the sub department the idea will belong to.	The sub department selected must match up with the sub departments saved on the system.	If there is a spelling mistake, or the sub department selected on the import does not meet the sub departments saved on the system, the record will still be allowed to be imported onto the system. However the sub department field will be empty.	This will be determined by the users and the codes they associate to the Sub Department. All codes will be unique.		Lookup (Sub Departments)

Team	This is an indication of the team the Idea will belong to.	This value must be valid from the system. The team selected must match up with the teams saved on the system.	If there is a spelling mistake, or the team selected on the import does not meet the teams saved on the system, the record will still be allowed to be imported onto the system. However the team field will be empty.	This will be determined by the users and the codes they associate to the Team. All codes will be unique.	N/A	Lookup (Teams)
KPI Type	This field contains the KPI Type Name of the idea.	The KPI Type needs to be created on the system in order to be identified as a KPI.	This field can be blank, the record will be imported.	Throughput \ Cost Usage \ Cost Price		Lookup (KPI Types)
IdeaSource	This is an indication of the idea generation the idea will belong to.	Alphanumeric value	If there is a spelling mistake, or the idea generator selected on the import does not meet the idea generator saved on the system, the record will NOT be imported onto the system.	This will be determined by the users.	The system will default to the first entry within the lookup.	Lookup (Idea Generator)
Situation	This field describes the situation preceding the implementation of an idea.	Can contain alphanumeric characters	The situation for the idea does not have to be captured for import to occur.	N/A	N/A	Variable Character (1000)
Opportunity	This field describes the complication/opportunity preceding the implementation of an idea.	Can contain alphanumeric characters	The complication/opportunity for the idea does not have to be captured for import to occur.	N/A	N/A	Variable Character (1000)
Solution	This field describes the solution preceding the implementation of an idea.	Can contain alphanumeric characters	The solution for the idea does not have to be captured for import to occur.	N/A	N/A	Variable Character (1000)
IdeaDefinition	This field contains the Idea Definition of the idea.	The Idea Definition needs to be created on the system in order to be identified as an Idea Definition.	This field can be blank, the record will be imported.	N/A	N/A	Lookup (Idea Definitions)
IdeaValue	The annualized value of the idea	The field does not have to be captured for import to occur. The field can only be a numeric value. If this field has a value greater than 0, it will be used as the Idea Value.	N/A	N/A	N/A	Numeric (whole numbers)
ForecastCalculationMethod	How the forecast will be calculated	If no value is provided a default value will be used. Valid values are: Forecast Percentages KPI Targets	If left blank, it will use a default value (See Default Values column)	Forecast Percentages KPI Actual Forecast \ Forecast Amounts	Forecast Percentages	Lookup (Forecast CalculationMethods)
AccessLevel	The Access level (Idea level Permissions) that will be granted to the idea	If no value is provided a default value will be used.	If left blank, it will use a default value (See Default Values column)	Default \ Confidential \ Global	Default	Lookup (AccessLevels)

Status	This field contains the Status of the idea.	If no value is provided a default value will be used.	If left blank, it will use a default value (See Default Values column)	Active \ On Hold	Active	Lookup (IdeaStatuses)
Stage1TargetDate	The Target date for the evaluating stage to begin.	Calendar date, which states when the target evaluating stage will begin.	N/A	Any date.	N/A	Date time (YYYY-MM-DD)
Stage1RevisedDate	The Revised target date for the evaluating stage to begin.	Calendar date, which states when the revised target evaluating stage will begin.	N/A	Any date.		Date time (YYYY-MM-DD)
Stage1ActualDate	The Actual date the evaluating stage began.	Calendar date, which states when the evaluating stage will begin.	This value will never be used, it will always be replaced by the revised date if one exists or the target date if one exists or it will be left blank	Any date.	N/A	Date time (YYYY-MM-DD)
Stage2TargetDate	The Target date for the implementing stage to begin.	Calendar date, which states when the target implementing stage will begin.	N/A	Any date.	N/A	Date time (YYYY-MM-DD)
Stage2RevisedDate	The Revised target date for the implementing stage to begin.	Calendar date, which states when the revised target implementing stage will begin.	N/A	Any date.		Date time (YYYY-MM-DD)
Stage2ActualDate	The Actual date the implementing stage began.	Calendar date, which states when the implementing stage will begin.	This value will never be used, it will always be replaced by the revised date if one exists or the target date if one exists or it will be left blank	Any date.	N/A	Date time (YYYY-MM-DD)
Stage3TargetDate	The Target date for the cashflowing stage to begin.	Calendar date, which states when the target cashflowing stage will begin.	N/A	Any date.	N/A	Date time (YYYY-MM-DD)
Stage3RevisedDate	The Revised target date for the cashflowing stage to begin.	Calendar date, which states when the revised target cashflowing stage will begin.	N/A	Any date.		Date time (YYYY-MM-DD)
Stage3ActualDate	The Actual date the cashflowing stage began.	Calendar date, which states when the cashflowing stage will begin.	This value will never be used, it will always be replaced by the revised date if one exists or the target date if one exists or it will be left blank	Any date.	N/A	Date time (YYYY-MM-DD)
Stage4TargetDate	The Target date for the lockedin stage to begin.	Calendar date, which states when the target lockedin stage will begin.	N/A	Any date.	N/A	Date time (YYYY-MM-DD)
Stage4RevisedDate	The Revised target date for the lockedin stage to begin.	Calendar date, which states when the revised target lockedin stage will begin.	N/A	Any date.		Date time (YYYY-MM-DD)
Stage4ActualDate	The Actual date the lockedin stage began.	Calendar date, which states when the lockedin stage will begin.	This value will never be used, it will always be replaced by the revised date if one exists or the target date if one exists or it will be left blank	Any date.	N/A	Date time (YYYY-MM-DD)

Custom Field Columns	CustomField Values	Custom Field column headers must be prefixed with the word 'CustomField' followed by the name of the custom field, ie: for the Category custom field, the column header name must be: 'CustomFieldCategory' remove all spaces and special characters.	This field can be blank, the record will still be imported.	Their value must be the exact value shown in the form for text, long text, number and drop down list types, for checkbox custom fields, the value must be either true or false. false = unchecked, true = checked. For date fields the date must be a valid date. Multi Select Custom Field Value will need to be specified inside square brackets. i.e. Budget, Invest,...	N/A	Variable Character
Tags	This field contains tag name/s of the Idea	Tag names length must be greater than 3 and cannot be duplicated. Tag name can contain alphanumeric	This field can be blank, the record will be imported.	Comma separated list	N/A	Variable Character (255)

 Preview