How to Import Questionnaire Answers

To import questionnaire answers, you must first download the required template. This can be done with the following process:

- Hover over **My Account** and select **Administration**

- Select **Import Data** from the Data Management section on the left-hand side

- Select **Questionnaire Answers** from the sub-menu

- Click on the **Actions** button and select **Download Template**

- Choose the relevant Questionnaire in the **Please select a Questionnaire** menu

- Click on the **Download** button to download a .CSV template, which can be opened as a spreadsheet

The data can now be added to the spreadsheet. Each row on the spreadsheet will create a new answer set for this questionnaire.

The first five columns on the spreadsheet specify how the imported data should be organised:

- **QuestionnaireID** – In this column, the ID number for the Questionnaire should be entered for each row of data. The first row will be populated automatically with the relevant ID number.

- **EntityType** – In this column, enter the type of record that the questionnaire should be attached to. This can either be 'Person', 'Professional', 'Staff', 'Volunteer' or 'Session'.

- **EntityID** – In this column, enter the ID number for the record that the answer set should be attached to. For example, if the EntityType is 'Staff', this would be the ID number of the relevant Staff record. For information on locating ID numbers, see the appendix, 'How to find a Record's ID number', at the end of this document.

- **TargetType** – If the EntityType for the questionnaire is either 'Person', 'Professional', 'Staff', or 'Volunteer', the TargetType allows users to also attach the questionnaire to either a Session or Session Group record. To do this, enter either 'SessionGroup' or 'Session' in this column. This is an optional column and can be left blank if not required.

- **TargetID –** If a TargetType has been selected, enter the ID number for the specific Session Group or Session record that the answer set should be attached to. For information on locating ID numbers, see the appendix, 'How to find a Record's ID number', at the end of this document. This is an optional column and can be left blank if not required.

	A	B	C	D	E
1	QuestionnaireID	EntityType	EntityID	TargetType	TargetID
2	4	Person	174	Session	1547

The remaining columns on the sheet will represent each of the questions contained on the questionnaire. The key points to note when adding data to these columns are:

- If a question is compulsory on Views, the corresponding column must be completed for each row on the sheet

- If a question has a specific validation, the corresponding column must meet this validation. For example, if the validation is 'Numeric', the values in this column must contain only numeric values

- If a question has a list of potential responses attached, the values in the column must match one of these responses exactly, including casing, spaces and spelling

One you have finished compiling the data, save your file in .csv format. To import the records:
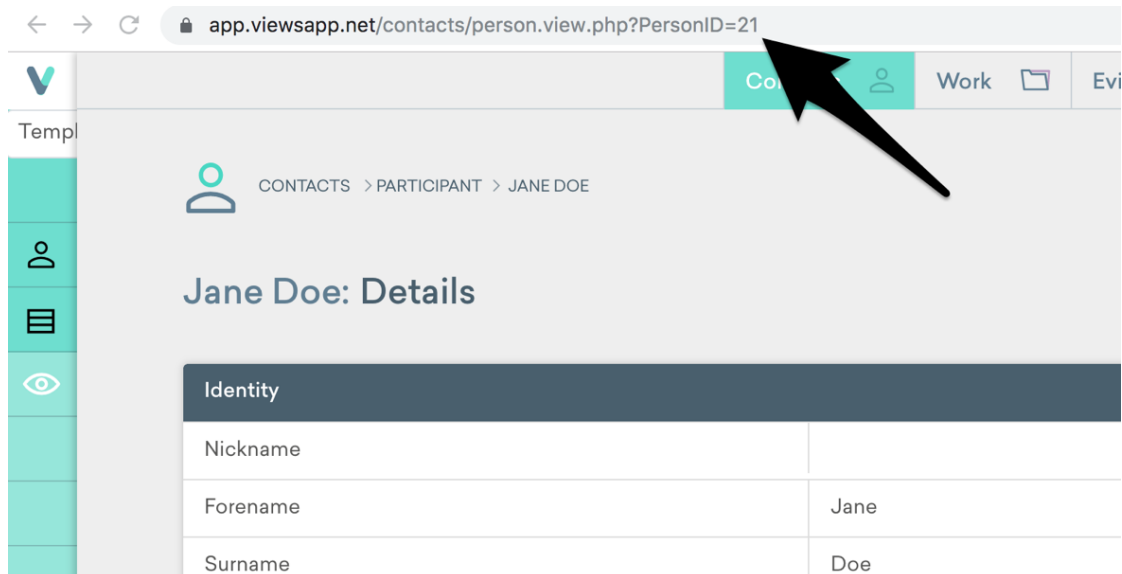
- Click on **Choose file** and select your file

- Click **Upload File**

If there are no issues with the data, a **SUCCESS** message will be displayed, and the data will be imported into your account. If there are any issues with the data, an error report will be downloaded, and no data will be imported. You can then address the issues described in the error report and repeat the upload.

Appendix - How to Find A Record's ID Number

First, locate the record that you wish to find the ID number for. For example, if the record is a Staff member:

- Hover over **Contacts** and select **Staff**

- Click on the name of the relevant person

- The ID number will be displayed at the end of the address at the top of the page. In the example below, the person's ID is **21:**