

Unite Education Program v6.0

Job Aid: 5147

Edit a Data Import Template



If a custom data import template was used more than once to import records, you cannot edit the **Description**, **File Layout**, or **Match Criteria**. Otherwise, you can edit the template as you see fit.

To edit a data import template

1. Open a browser and log on to Unite.
2. On the main menu, click UTILITIES.
3. On the *File Processing* tab, click **Data Import Templates**.
4. In the *Data Import Templates* grid, click the **Description** for the template you want to edit.
5. Edit the template options.

Note

You can drag and drop the fields from the *Available Fields* list to the *Selected Fields* to add them to the template. If you cannot quickly find a field to select, use the search option to find available fields. To remove data fields from the template, drag and drop the fields from the *Selected Fields* list to the *Available Fields* list. In the *Selected Fields* list, drag and drop fields to put them in the correct order. A top-to-bottom order in the data import template aligns with a left-to-right order in the import file.

6. If you want to see a list of fields, lengths, matching criteria, and other template details, click , and then open the file from your browser or your download folder.
7. Click  .