

Questica Import / Export Excel Spreadsheets Tips

Questica allows you to export the contents of grids to an Excel spreadsheet. You can then edit the data and import it back into Questica to update lots of data at once. Since this tool can change vast amounts of data easily without the ability to undo it be sure to follow these tips to avoid any unexpected results.

1. **Export, Edit, Import.** The workflow for editing Questica data within a spreadsheet is to export the contents of a grid, edit the data, and then import it back into Questica. To make more changes, you must repeat this process.
2. **You can't import a spreadsheet twice.** Questica Budget spreadsheets are single use. After you've edited data and imported the changes, you must either work with the returned error sheet or export again to make more changes.
3. **Changes from spreadsheets can partially succeed.** The spreadsheet system will commit all changes that it can, even if other changes result with an error. If you get errors you will receive a new spreadsheet containing only those error rows. You can edit and re-import that spreadsheet to complete your work.
4. **You can't import spreadsheets that didn't come from Questica.** Questica spreadsheets contain embedded information that tells the system how to handle the data. If you have data in a non-Questica Budget spreadsheet that you want to bring into the system, you can export a spreadsheet, paste in the data, and then import it.
5. **When pasting, paste as values.** Pasting without values removes data validation rules. Any time you have data validation rules you need to use this feature.
6. **You can't import spreadsheets that came from an Ad Hoc View.** Spreadsheets generated by exporting an Ad Hoc View contain information gathered from various areas within Questica. Since each row might correspond to any number of records, you cannot import these spreadsheets back into Questica.
7. **Hidden column A.** There is a hidden column A in all exported Questica spreadsheets. It allows the system to know which row is which when you import back into the system. It also lets the system know that an inserted row is new data (blank) and that a row has been deleted (ID is missing). It is important that you do not edit column A and that if you sort then you included column A in that sort. Alternatively, you can always sort your data in Questica before exporting.

8. **Watch out for data types in Excel.** A green triangle at the top right of a field indicates that it is a text field. If you update these fields make sure to keep it as a text field. To convert a field to a text field, use the Text to Columns feature in Excel.
9. **Use Data Validation in Excel.** You can use the Excel Data Validation feature to circle and correct any invalid data before you try to import it into Questica.
10. **Export all mandatory fields.** If you plan on entering new rows of data ensure that you include mandatory fields in the grid prior to exporting or you will not be able to Import your data. Mandatory fields are identified with an asterisk.
11. **You can export custom fields.** Custom fields will automatically show up on exported Excel spreadsheets, if the fields were exposed, and active within the grid when the export was performed.
12. **Extra data is ignored.** If you type into columns beyond the right-most exported column, below the last blue row, or even add additional worksheets, you can leave this data. Questica will ignore any extra data outside the exported data when importing.
13. **Be careful with Lookup items.** When updating lookup items in export spreadsheets ensure they already exist in Questica or you will not be able to use them.