

## Oracle CRM On Demand Data Import Workshop NEW

**Duration:** 1 Day

### What you will learn

This course is designed for individuals responsible for importing data into Oracle CRM On Demand for their own companies or as a consultant for other companies.

This course examines the important task of importing data into Oracle CRM On Demand. It provides instruction on collecting and cleansing source data, including formatting data according to the various field types; importing in the proper sequence; troubleshooting import errors; and avoiding common user errors. The course provides tips and best practices so that participants can successfully import data into Oracle CRM On Demand, resulting in high quality data for end users and no or little rework for administrators.

Through a series of hands-on lab exercises, participants learn how to identify errors in source data and prepare data for import. Participants also practice using the Import Assistant in CRM On Demand and fixing errors due to improper data preparation, allowing students to test new skills in a safe environment with instructor support.

Learn to:

- Consolidate and prepare legacy data records
- Create record relationships
- Consider CRM On Demand configuration and field type formats
- Use the Import Assistant
- Employ duplicate record checking methods
- Troubleshoot and fix data import errors

### Audience

- Business Analysts
- Functional Implementer
- Project Manager
- Technical Consultant

### Prerequisites

*Required Prerequisites*

Oracle CRM On Demand Administration Essentials NEW

*Suggested Prerequisites*

- Basic Microsoft Windows navigation skills
- Basic file-management skills
- Familiarity with Web-based applications

### Course Objectives

- Identify and consolidate source data
- Prepare source data
- Observe Oracle CRM On Demand import requirements
- Use the Import Assistant
- Validate the import and troubleshoot errors

## **Course Topics**

### **Preliminary Steps for Preparing Data**

- Identifying Source Data
- Setting Up Files for Record Types
- Identifying Data Needs
- Checking Size and Storage Limits

### **Next Steps for Preparing Data**

- Formatting Import Files
- Eliminating Duplicate Records
- Linking Records During Import
- Verifying Data by Field Types

### **Verifying and Cleaning Data**

- Verifying Data by Field Types
- Excel Tip: Formatting Date Columns
- Excel Tip: State/Province/County Mapping

### **Using the Import Assistant**

- Accessing the Import Assistant
- About the Steps of the Import Assistant
- About Mapping Files
- Accessing the Import Request Queue
- Use advanced Excel tips for cleaning data

### **Data Validation and Troubleshooting**

- Reviewing Import Results
- About Log Files and Error Messages
- Correcting Import Errors
- Reimporting Failed and Partially Imported Records

### **Tips and Best Practices**

- Specific tips for importing certain record types
- Best practices and reminders

### **Wrap-Up**

- Additional Resources