

# Import Summaries Table

This table holds one template record that can be used to generate new records on a scheduled basis. Each record holds all of the import logs for one import event, which might include records being imported into multiple tables.

### Import Summaries

Status: 3 record(s) found, 1 page(s). Click [here](#) to count records again..

[New](#) | [Mass Edit](#) | [Delete](#) | [Actions](#) ▾

[Views](#) ▾ | [Search](#) ▾ |  ▾ |  ▾ |  ▾

<input type="checkbox"/>	ID ↓	Date Created	Title	Number of Import Logs	Number of Failed Import Logs	Status
<input type="checkbox"/>	15	Aug 09 2018 09:12	Weekly Import Summary on Aug 09 2018	4	0	Completed Successfully
<input type="checkbox"/>	5	Aug 02 2018 15:32	Weekly Import Summary on Aug 02 2018	3	2	Completed with Failures
<input type="checkbox"/>	3	Aug 02 2018 14:51	Template (DO NOT DELETE)	0	0	Completed Successfully

Within each Import Summary record, a user can view the imports that were run and their status, the number of records imported, and so on. Here is the result of a single import run:

The first import summary record is a template that is used to create all of the other import summary records. This template record should be linked to the import template record that represents the first table to be imported.

**Import Summary**

Save Cancel Summary Emails History <> [Print] [Refresh]

Collapse All

ID	3	Status
Title	Template (DO NOT DELETE)	

History Information

Date Created	Aug 02 2018 14:51	Created By	Admin System
Date Updated	Aug 08 2018 10:52	Updated By	Admin System

Set First Import

First Import Table	External User	First Import Template ID	1
Step # of First Import	3		

# Automation

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This table holds the following rules:

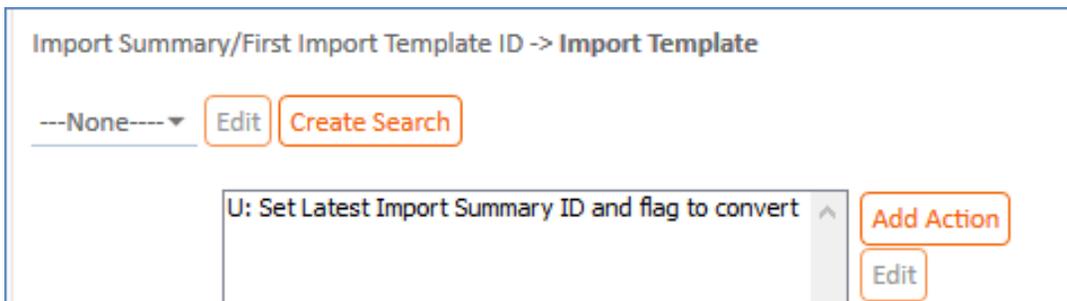
Priority ↑	Comment	Conditions	Name of Action(s)	Actions Descriptions
1	Create: Import Summary creation actions - launch template and update title	Apply Rule: When a Import Summary is Created	Set Title with current date Trigger import in first import template	Update action:Set Title with current date Update fields:Title New values:"Weekly Import Summary on "+dateformat("MMM dd yyyy",NOW() --- Import Summary/First Import Template ID(Set Latest Import Summary ID and flag to convert) -> Import Template
1	zdisabled: TB weekly: Convert template to start process - sat morning	Saved search: R: title contains template	Convert to new summary to launch import Delete history from 2 weeks and older	Data conversion action Convert to new summary to launch import: Import Summary is converted to Import Summary --- Delete records
2	Edit: Import summary update when completed	Apply Rule: When a Import Summary is Edited	When a Import Summary is Edited	if (Number of Failed Import Logs>=1) { Update action:Set Status to Completed with Failures Update fields:Status New values:Completed with FailuresEmail action:Email Admin Team of failed import To:teams Admin Team Subject: Note: \$title completed with failures Message:\$formula("Admin Team"),Out of

### Create: Import Summary creation actions - launch template and update title

This rule runs when an import summary record is created by web or API. It sets the title to "Weekly Import Summary on [date]" with an update action:

"Weekly Import Summary on "+dateformat("MMM dd yyyy",NOW())

and also runs a linked record action called "Trigger import in first import template," which goes down to the linked first import template record and updates a flag field in that record to cause it to be converted into a new Import Log record linked back to the Import Summary.



U: Set Latest Import Summary ID and flag to convert:

Please enter new values for these fields

Flag to convert to Import Log

Treat the above as  Standard text  A formula

Latest Import Summary ID

Treat the above as  Standard text  A formula

The import log records are the records that actually run the import action and report back the results.

When one record is finished, it launches the subsequent one, and so on, until all are finished.

When all the imports are finished, a rule on the Import Log table updates the Import Summary record to set a field called Completed to Yes, and causes a recalculation of the number of imports fields in the Import Summary, and this update triggers another rule on the Import Summary table called "Edit: Import summary update when completed" which checks to see if there were any failed import logs. It runs the following action:

```

if (Number of Failed Import Logs >= 1) {
  Set Status to Completed with Failures
  Email Admin Team of failed import
} else {
  Set Status to Completed Successfully
}

```

If there were failures, it sends an email to the Admin Team notifying them of the failure.

If not, it sets the status to Completed Successfully.

**Edit: Import summary update when completed**

This rule runs when an import summary record is edited by web or API. It runs an if-then action to update the Status of the import summary record and send an email based on the status of the import logs.

```

if (Number of Failed Import Logs >= 1) {
  Set Status to Completed with Failures
  Email Admin Team of failed import
} else {
  Set Status to Completed Successfully
}

```

**(Disabled) TB weekly: Convert template to start process**

The time based rule starts the import process. By default, it runs weekly on Saturday at 3am. It runs a conversion action that creates a new Import Summary record by converting the record with the word "template" in its title to a new record. The conversion maps only one field: the default starting import template:

First Import Table (Import Template:Import Table)	Do not map
First Import Template ID (Import Template:ID)	First Import Template ID (Import Template:ID)