Import and Export Actions

Import actions are used for automating imports and updates from another system, or from special format fields in your system. Export actions are used to export information from your Agiloft system into a new file. Both Import and Export actions are typically initiated by time-based rules that run after hours, which helps mitigate the impact of a large-sized import or export on the system.

> ⓘ **Example**
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> If real-time sync is not needed, you can automatically import changed data from another system into Agiloft by using an Import action to update or create the relevant records. Conversely, you can schedule a nightly Export action to export data from Agiloft for importing into another system.

Import Actions

When you create an import action, you configure options with a wizard that is very similar to the normal import wizard used for manually importing data. If your goal is to synchronize data between systems, which is often the case, place the import action in a time-based rule in the table into which you want to import data.

1. From the top nav bar, expand the table's drop-down and select Setup [Table].
2. Select the Actions tab in the Table wizard.
3. Click Create Import Action.
4. On the General tab, name your action and give it a description.

> ⚠ Once your action is saved, the system automatically adds a T: before your given title to distinguish the action as Import.

5. Navigate through the remaining tabs of the Import wizard. For more information on the import options, see Importing Record Data . Note that you cannot import data from a local hard drive with an Import action.
6. Click Finish to save the Import action.

Import from Agiloft Fields

In addition to importing content from outside your Agiloft system, Import actions can also be used with special format fields in the same KB. For example, some AI models generate JSON output for debugging purposes, and some third-party API integrations use JSON formatting to send data. You can use an Import action to parse the content into other fields so it becomes usable in Agiloft.

To create an Import action for internal fields:

1. Go to Setup [Table] and go to the Actions tab.

2. Click Create Import Action.
3. On the General tab, name your action and give it a description.

> ⚠ Once your action is saved, the system automatically adds a T: before your given title to distinguish the action as Import.

4. On the Data Source tab, select "Text field in the current table" and choose the field from the drop-down menu. This menu lists fields whose format is text, XML, or JSON.
5. In the Upload Sample section, paste sample text in the box that follows the same format used in the field you selected. For example, use JSON output from the AI model as a sample here.
6. Verify the format of the text. This is selected automatically when you provide a sample.
7. Complete the rest of the fields on the other tabs until you reach the Fields tab.
8. On the Fields tab, map the formatted sample text to Agiloft fields. When dealing with JSON output from an AI model, formatted sample text is referred to as JSON Attributes. JSON Attributes reflect annotation that relates to the AI model:

Id	Sample Data	Column
1	annotation[0].label (Job Title)	*Not Imported* ▾
2	annotation[0].points.end (405)	*Not Imported* ▾
3	annotation[0].points.start (384)	*Not Imported* ▾
4	annotation[0].points.text (President and Director)	Job Title ▾

9. Click Finish to save the Import action.

Export Actions

The wizard for Export actions is very similar to the Export wizard for manual, one-time exports.

To create an Export action:

1. Go to Setup [Table] and go to the Actions tab.
2. Click Create Export Action.
3. On the General tab, name your action and give it a description.

> ⚠ Once your action is saved, the system automatically adds an X: before your given title to distinguish the action as Export.

4. Complete the Destination and Data Format tabs as desired. You cannot export data to a local hard drive with an Export action.

5. Complete the Options tab. For more information on available export options, see Exporting Record Data. Two additional options not included in the Export wizard for manual, one-time exports are also available:

   - **Filename**: Defines the name of the export file. Two options are available when defining the filename:

     - **Overwrite the file**: Overwrites the existing export file with the new export file.
     - **Add Date and Time to new file**: Appends the current date and time to the export filename, and any existing export files are not overwritten. If you select this option, you must include the default `$date` and `$time` variables at the end of the filename, such as `$label_export_$date$time`. Otherwise, any existing export files will be overwritten and the date and time will not be appended to the filename.
   - **Email log file to**: Defines email addresses to receive the log file that's generated when the Export action runs. You can choose to send the log file in the body of the email or as an attachment. If the field is left blank, the log file is not sent.
6. Click Finish to save the Export action.