

Objective: Importing People in CME Tracker from an Excel Document.

Note: Knowing your CME Tracker Folder Path will help you to IMPORT. See Tutorial: "Locating your CME Tracker Folder Path".

Step 1: Open the excel file you wish to import.

Note: You will want to Save the file as a CSV (Comma Separated Value) to your CME TRACKER folder. (Fig. A)

Step 2: Click on File. Click on SaveAs (Fig. A)

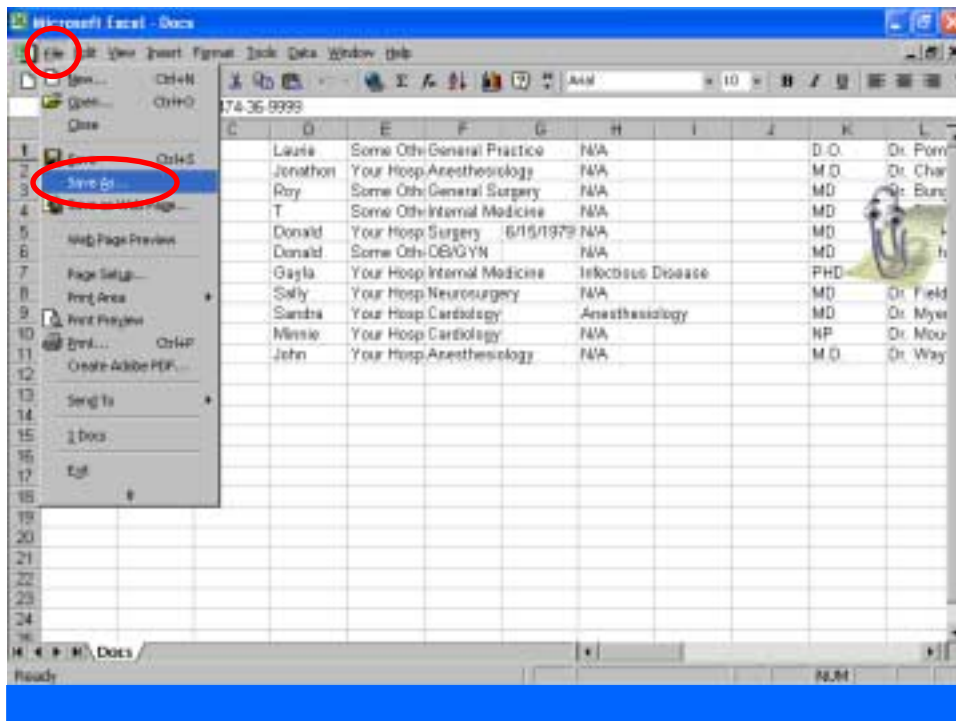


Fig. A

Step 3: Select your CME Tracker Folder. Enter File name. Save As Type CSV. Click on Save (Fig. B)

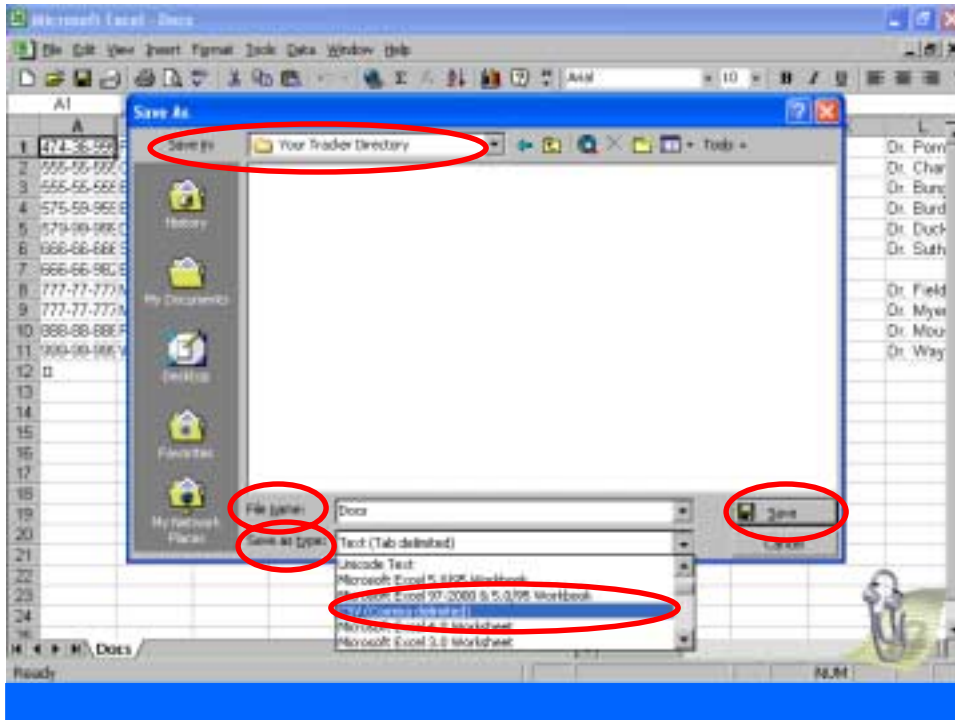
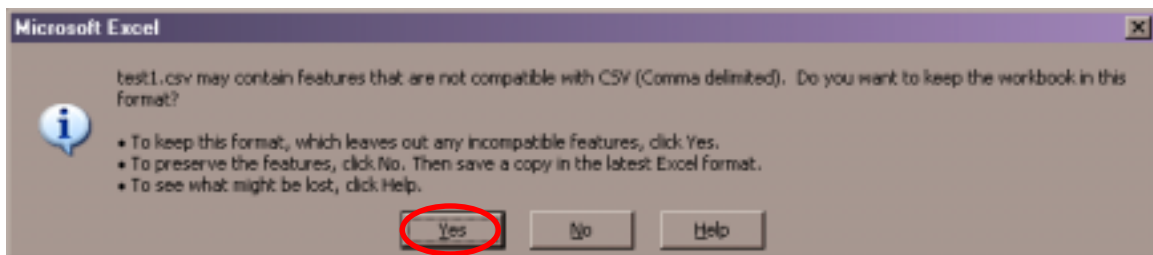
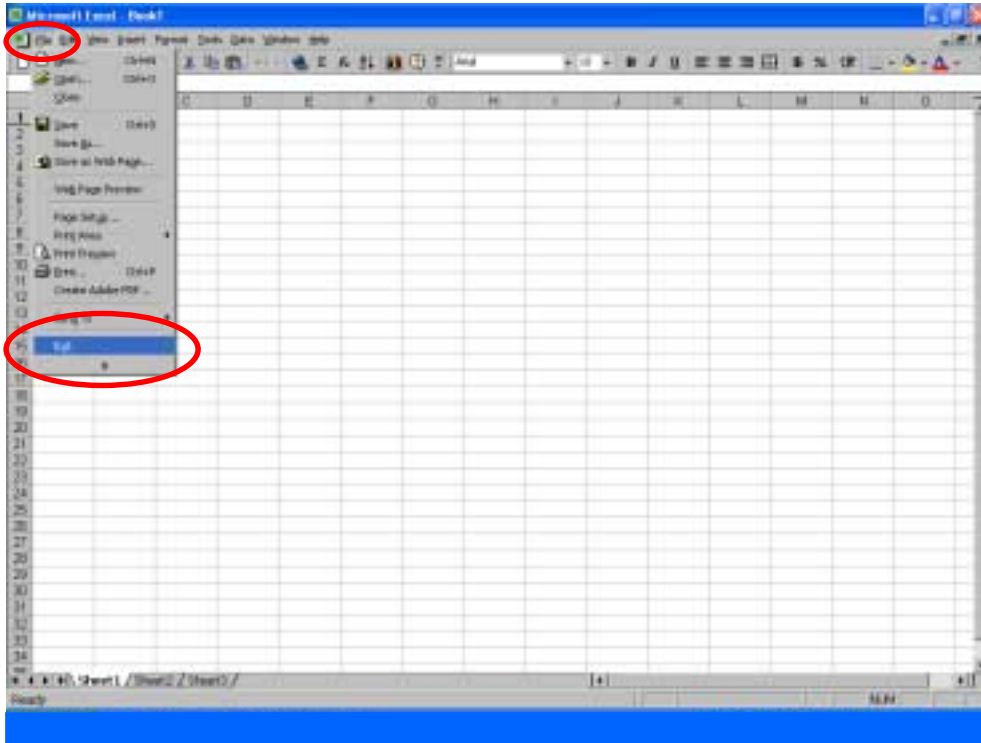


Fig. B

Step 4: The Microsoft Excel popup appears. Click on Yes.

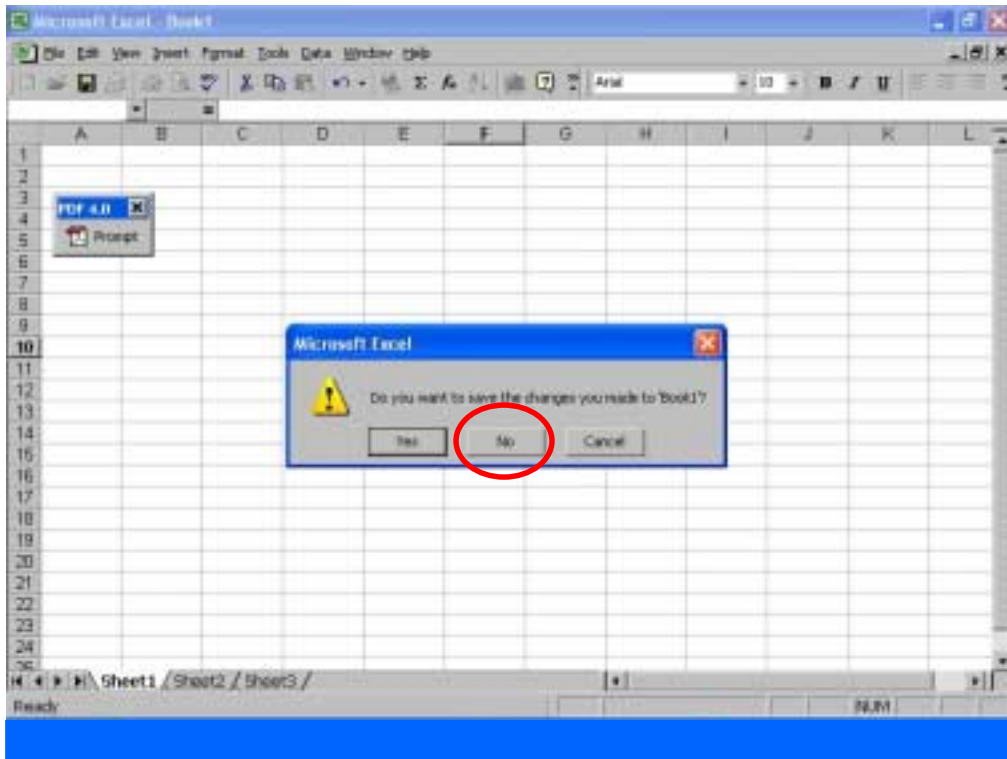


Step 5: To close excel, Click on File. Click on Exit. ([Fig. C](#))



[Fig. C](#)

Step 6: Microsoft Excel popup appears. ClickOn. ([Fig. D](#))



[Fig. D](#)

Step 7: Open CME Tracker. Click on the People Tab. Click on Tools. Click on Import. (Fig. E)

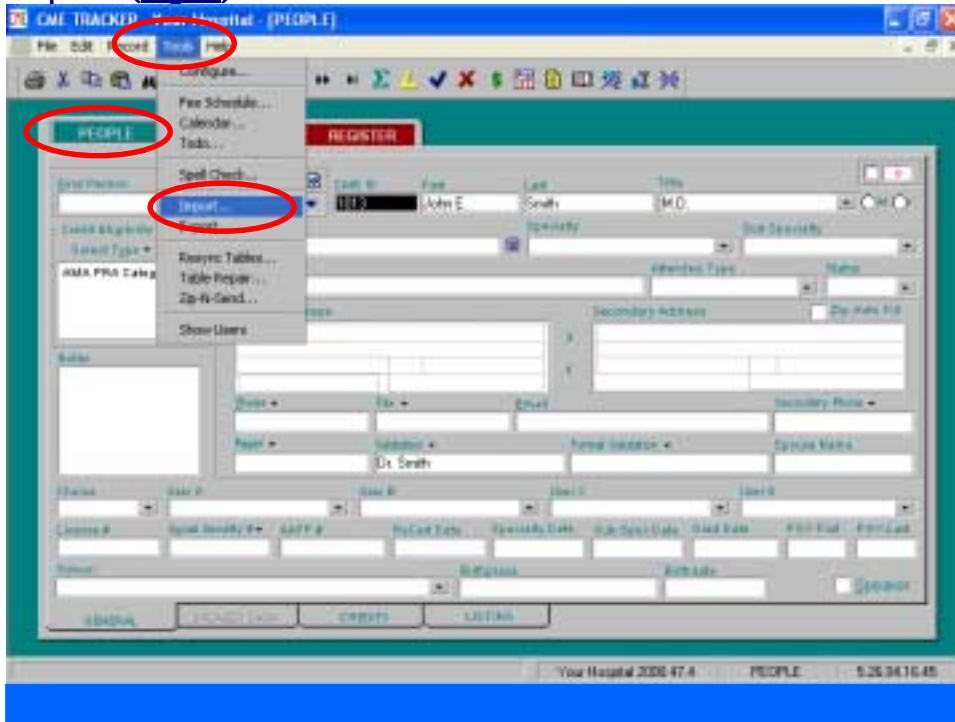


Fig. E

Step 8: Click on the "... " To browse for the file you want to import. (Fig. F)

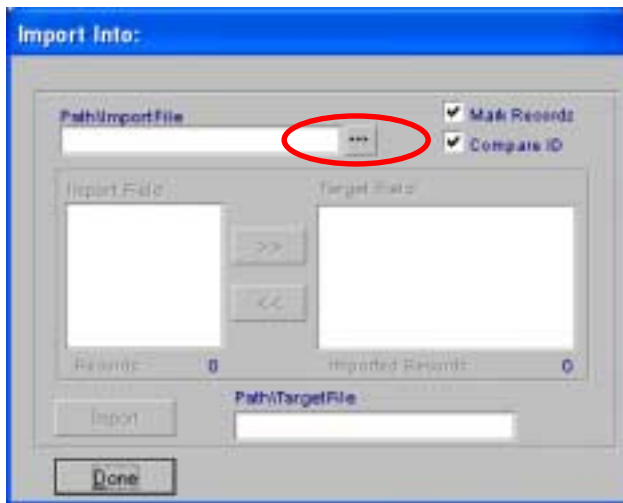


Fig. F

Step 9: Select CSV under files of type . Click to select the file you wish to import. Click on Open. (Fig. G)

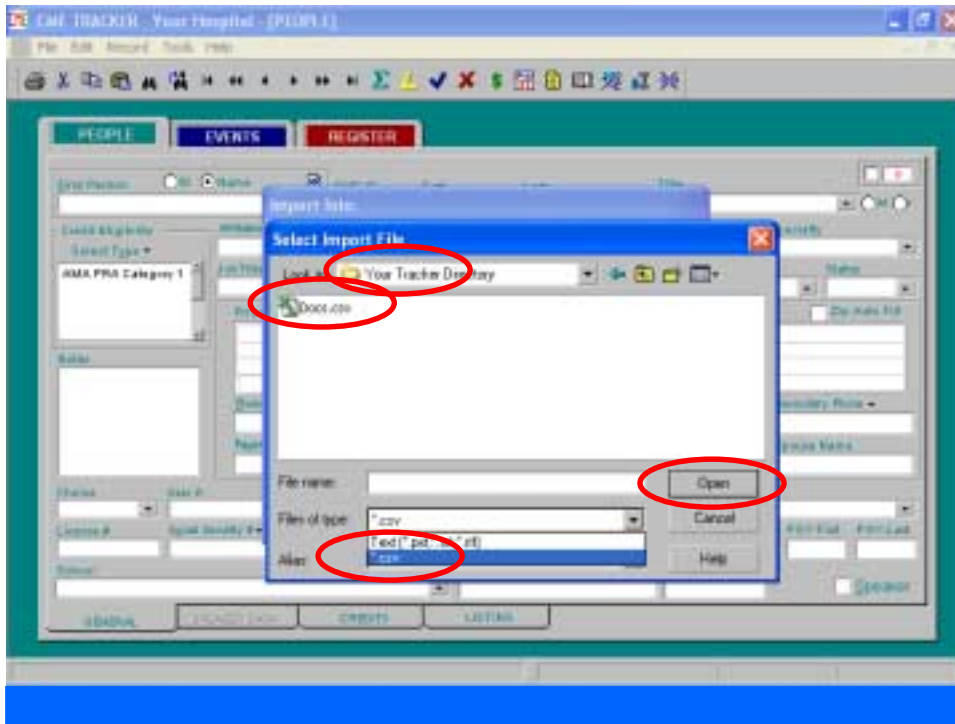


Fig. G

Note: Mark Records and Compare ID is automatically checked when the "Import into:" popup appears. Compare ID out Mark Records will mark all your import records when they enter CME Tracker. Compare ID will compare an ID inside CME Tracker so you will not have duplicates. You want Compare ID unchecked because of its specialized purpose.

Step 10: Assign the Import Field to the Target Field by selecting the fields and clicking on the >> button. The Import field refers to your import excel sheet and the target field refers to CME Tracker. (Fig. H)

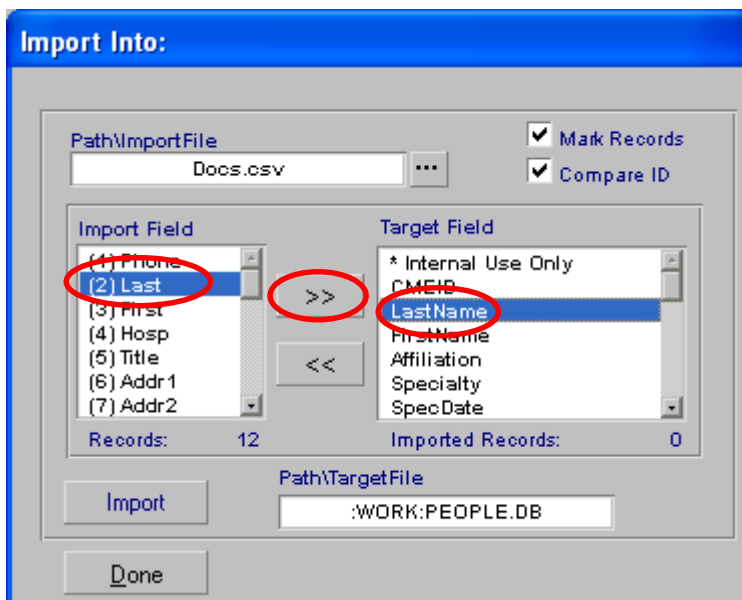
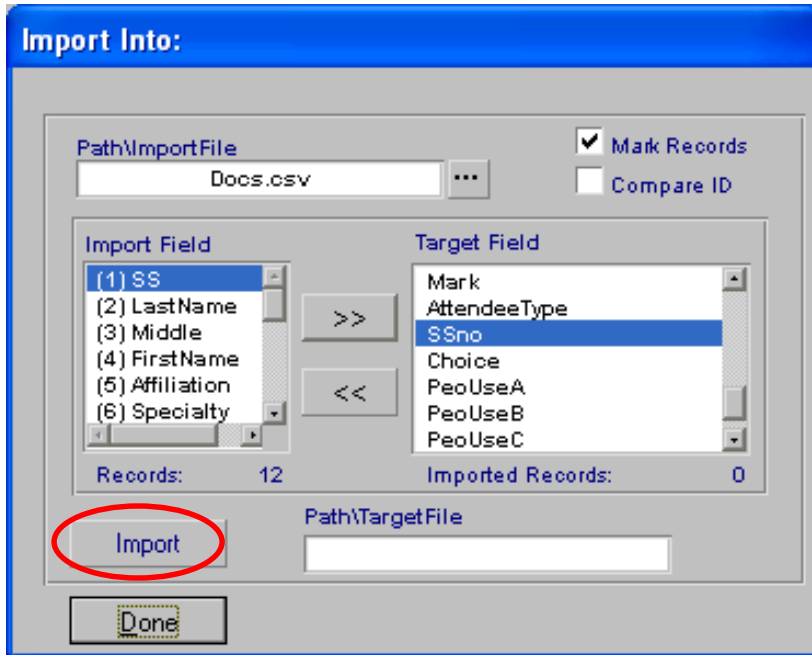


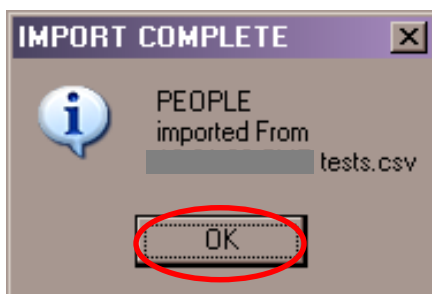
Fig. H

Step 11: Click on Import to import the people into CME Tracker. ([Fig. I](#))



[Fig. I](#)

Step 12: The Confirm Import Complete Popup appears. Click on Ok. ([Fig. J](#))



[Fig. J](#)

Step 13: Click on Done to return to the People tab and review your records.
(Fig. K)

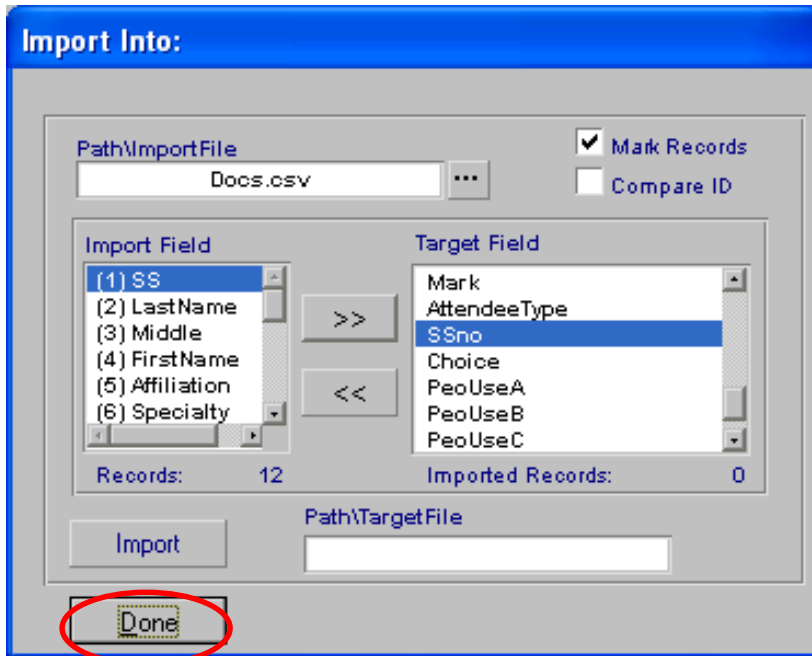


Fig. K

Result: When you return to the CME Tracker you will have imported all the records and they will be marked in the people area.