



# Generating Import Source File

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
Generating import source files enables you to create a file that contains a header row with the columns organized to match the import file template design. For example, if you need to create an import data file but do not know the correct column order, you can generate the import source file to create a data file with a header row displaying the columns in the correct order. Generating the source file begins the download process immediately.

## Before you begin

- The [import file template](#) must exist.


1. Select  > **Administrative Access** > **System**.
2. Select **Import Manager** under *Features*.

## Step Information



Alternatively, you can navigate to  > **Administrative Access** > **System** and select **Import Designer** under *Features*. Continue to the next step.

## Expected Result

You see the *Import Manager* screen, which displays existing import file templates.

3. Click the  icon to the left of the appropriate import file template.

## Step Information

Alternatively, click the  icon to the left of the import file template on the *Import Designer* screen. Additionally, you can click the  icon to the left of the import file template on the *Import Manager* screen.



## Expected Result

You see the *Record Options* drop-down menu.

4. Select **Generate Source File** from the menu.

## Step Information

Alternatively, if you opened the import file template from the *Import Manager* or *Import Designer* screen, you would select **Generate Source File** near the top right of the screen.

The system creates an import source file based on the file type selected when the import file template was created. To view that selection, navigate to  > **Administrative Access** > **System** and select **Import Designer** under *Features*. Then click the  icon to the left of the import file template. Verify the selection in the File Type field on the *General* tab of the *Import Designer Details* screen. The types of files are CSV/Delimited, Excel, or Fixed Width.

#### Expected Result

The download process begins and the browser prompts you to open or save the file; Skyward recommends saving the file. When the download is complete, the file is accessible through your computer. You can now open the file and save it to the appropriate location.

You have successfully generated an import source file for an import file template.