

Exporting and Importing Resources

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Applies to:

- Objects
- Reports
- Forms
- Boards
- Screens
- Charts
- Records
- Hierarchies of structure view
- Choice fields and their options
- Relationships
- Photos and Icons
- Documents and Document templates
- Resource Keys

Overview

- Import/Export XML allows components such as reports, screens, charts, boards, workflows, etc., to be exported to XML.
- Any resource can be exported/imported, including user data
- The XML file can be imported into a different tenant.
- If the item being imported already exists, it will be replaced by the imported file.

Exporting to XML

1. The user first must be assigned the 'Import/Export' role
2. Navigate to a report (or create a report) that displays the element you are trying to export. (e.g. if trying to export a report, navigate to the "Reports" report in Administration)
3. Right click on the row and select '**Export**'
4. The XML file will download

Importing through the console

Note: Only administrators with the *Import/Export* role can import XML files

1. The user first must be assigned the 'Import/Export' role
2. Go to Administration
3. Select **Resources**
4. Select **Import Resources**
5. Select **Upload** and select the file to upload

If there are dependency errors when importing a resource then this can be resolved by adding the relevant resources to a new application. A new application can be created expressly for this purpose if necessary, and the whole application can be exported.

Relationship Rules

- To import related instance, the relationship must be imported first, meaning the relationship should exist on both the tenants.
- The relationship must be set to full ownership on both the tenants.
- Full ownership can be set on following fields:
 - 1-1 lookup
 - Many-1 lookup
 - 1-Many relationships
 - Image field
- Once the full ownership is set and the relationship is made available on both the tenants, user would be able to import related instance

Import Rules

- When importing a file, if the content does not already exist, then the imported content is added to the system.
 - If the content being imported does already exist, then it replaces the existing one
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