

Data Import and Export Procedures Manual

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Prepared by: Data Management Team

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1. Introduction

This manual outlines the procedures for importing and exporting data on enterprise platforms. It provides guidelines to ensure data integrity, security, and compliance with organizational policies.

2. Scope

This document applies to all teams responsible for maintaining and transferring data across platforms in the enterprise environment.

3. Data Import Procedure

1. Preparation

- Identify source data and secure required permissions.
- Confirm data format compatibility (e.g., CSV, XLSX, JSON).
- Validate data for accuracy and completeness.

2. Import Steps

- Access the enterprise platform's data import module.
- Upload the data file using the provided interface.
- Map source fields to destination fields as instructed.
- Review and confirm import preview.
- Submit import for processing.

3. Post-Import Verification

- Check import logs for errors or warnings.
- Verify sample records in the platform.

Supported Data File Types

File Type	Description
CSV	Comma-Separated Values
XLSX	Microsoft Excel Workbook
JSON	JavaScript Object Notation
XML	Extensible Markup Language

4. Data Export Procedure

1. Preparation

- Identify required data and target format.
- Obtain necessary permissions to access data.

2. Export Steps

- Log in to the platform and navigate to export module.
- Select data sets or reports for export.
- Choose required export format (e.g., CSV, XLSX, JSON).
- Configure export settings (e.g., filters, field mapping).
- Initiate export and download the file.

3. Post-Export Actions

- Check export file for accuracy.
- Securely store or transmit exported data as per policy.

5. Data Security and Compliance

- Ensure all transfers follow data privacy and security standards.
- Do not share data with unauthorized individuals.
- Follow company protocols for data retention and deletion.

6. Troubleshooting & Support

- Review error logs provided by the platform during import/export.
- Consult the IT or Data Management team for unresolved technical issues.
- Refer to the platform documentation for detailed field mapping instructions.

7. Document History

Version	Date	Description
1.0	[MM/DD/YYYY]	Initial version

This is a sample document. Please customize according to your platform and organizational needs.