

QUICK START GUIDE: DATA IMPORT

The **Import Data** feature in LLumin CMMS+ lets you bulk import assets, materials, or other datasets using a validated Excel template.

Important: The LLumin Import Template uses macros. If your organization blocks macro-enabled spreadsheets, work with LLumin Support or your implementation consultant to complete the import.

Steps to Import Data

1. Click the **Gear** icon in the upper-right corner.
2. Select **Import Data**.
3. On the Import Data screen, download both files:
 - **LLumin Import Template** – Used to enter and validate your data.
 - **Import Template Configuration File** – Used to validate data based on your instance setup.

Prepare the Files

1. Locate both files in your **Downloads** folder.
2. Right-click each file, select **Properties**, and check **Unblock** (if shown).

This enables Excel macros when opening the template.

Use the Import Template

1. Open the **LLumin Import Template** in Excel.
2. On the first sheet, select the **dataset type** (e.g., Assets).
3. Click the link to **upload the configuration file**.

A green checkmark appears when the file loads successfully.

4. Either:
 - Click **Select Source File** to import data from another workbook, or
 - Enter data manually into the generated sheets.
5. When finished, return to the first sheet and click **Validate Import**.

Validation checks for required fields, character limits, and valid record references.

After Validation

Save the validated file and send it to your LLumin implementation consultant for import into your instance.

NOTE: Access to the Import Data screen requires a specific user permission. If you do not see this option, contact your system administrator.