c360 Import Manager Installation & User Guide
Microsoft Dynamics CRM 3.0 compatible

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c360 Import Manager _____

Overview

c360 Import Manager is a powerful data import tool built specifically for Microsoft Dynamics CRM. Import Manager makes it possible to import data from one or more data sources, create new records of a given entity in the CRM database, and create relationships to other entities in one single process. Compared to the import tool within Microsoft CRM, Import Manager offers a more flexible way to import data including the ability to create relationships to an existing entity in CRM, creating new relationships between entities and in the Import Process and schedule on-going data imports. Import Manager gives you the ability to:

- Import core data into Microsoft CRM entities (Accounts, Contacts, Opportunities)
- Import data into **custom entities** and **custom fields**
- Relate entities to each other
- Create new relationship between entities
- Customized field mapping
- Customizable duplicate checking
- Data cleansing capability – updating fields on already existing records during an import
- Save your field mapping to a configuration file for later use
- **Scheduling functionality** for **on-going** regular data imports
- Create on-going data import from your data provider (e.g, Dun & Bradstreet, ERP system)
- Plug-ins for ODBC datasource, Text files, Excel files
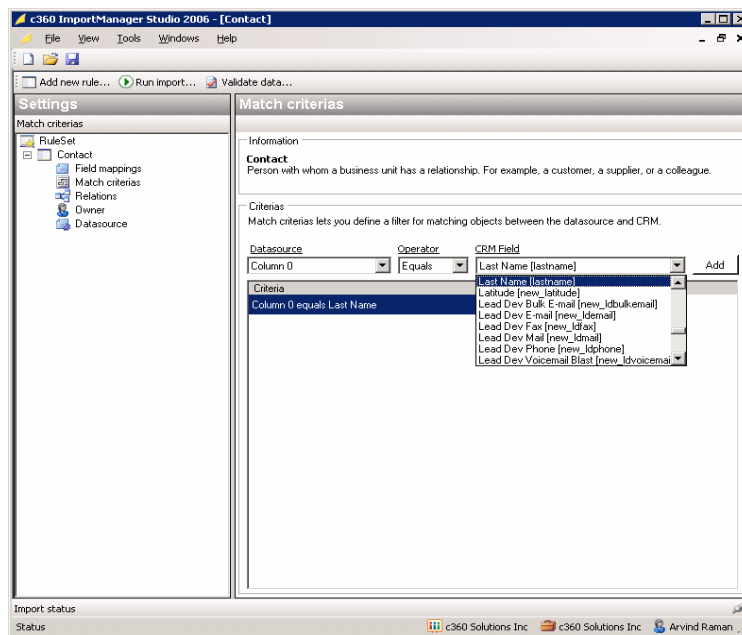
c360 Import Manager

	Microsoft CRM 3.0	c360 Import Manager
Entities		
Accounts	✔	✔
Contacts	✔	✔
Leads	✔	✔
All customizable entities		✔
Relationships		
Relate contacts to accounts		✔
Relationships b/w all entities		✔
Features		
Save Import template		✔
Duplicate checking		✔
Update records with new information		✔
Schedule imports		✔
Datasources		
Excel plug-in		✔
ODBC plug-in		✔
Custom plug-in (develop your own)		✔

Comparison chart with Microsoft CRM's import tool

Installation _____

Requirements

Import Manager Studio works with Microsoft Dynamics CRM 3.0 and requires .NET Framework 2.0 to be installed on the computer.

You don't need to install Import Manager on a server. The program can be installed on a client computer running Windows XP Professional, which is connected to the domain of the Microsoft Dynamics CRM database server.

Setup

To install the program, double click the 'c360 ImportManager Setup.msi' file

Simply accept the license agreement and follow the wizard. Always remember to install the program on a computer connected to the CRM database on the server.

Also remember that to run scheduled tasks, the computer with the program installed has to be switched on or able to wake up from hibernation or standby at the time when the scheduled task is due to be executed. So don't install Import Manager on a computer that normally is switched off at the end of the workday, if you have planned a scheduled task to be executed during the night.

Installation Steps

1. Click Next on below screen
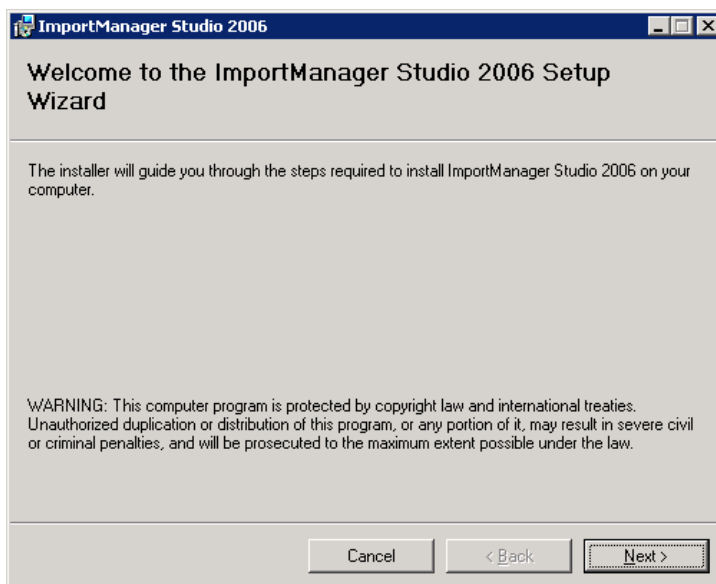
Figure a: Import Manager Setup

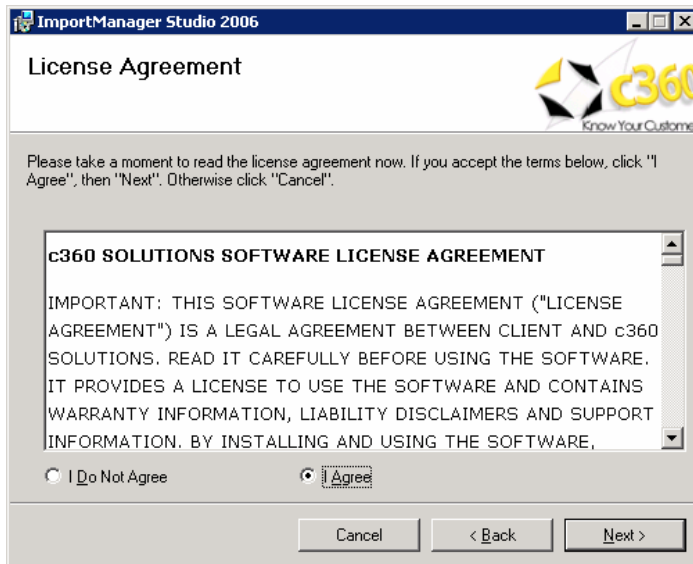2. Click 'I Agree' to accept the license agreement

Figure b: License Agreement

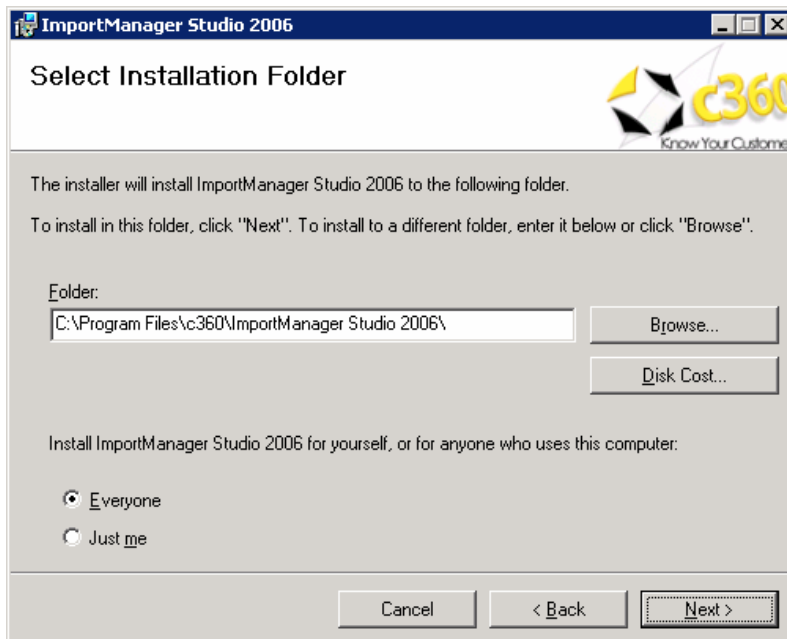3. Select the installation folder (Default is recommended)

Figure c: Select the Installation folder
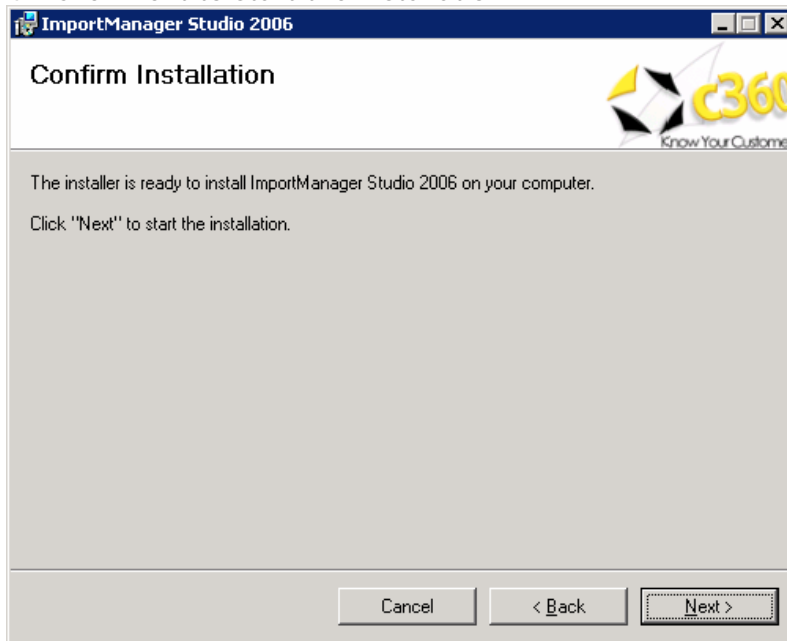
4. Click Next to start the installation
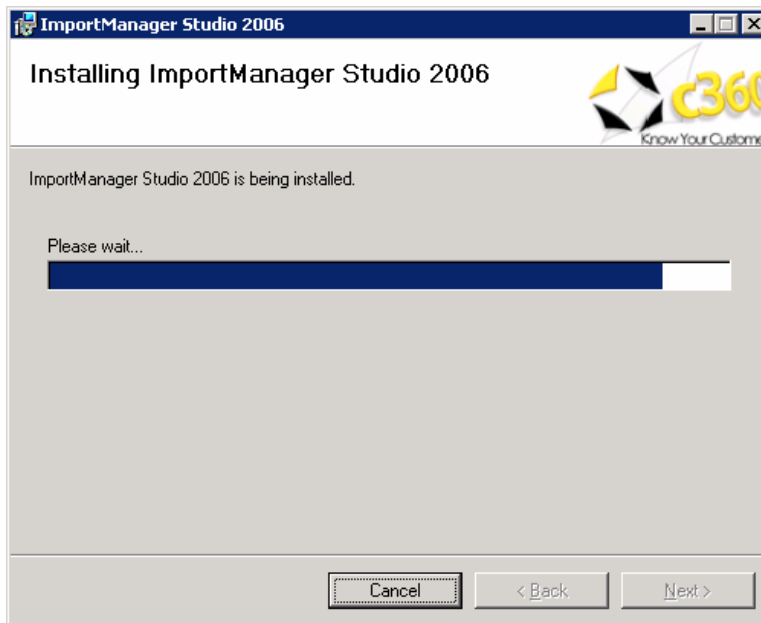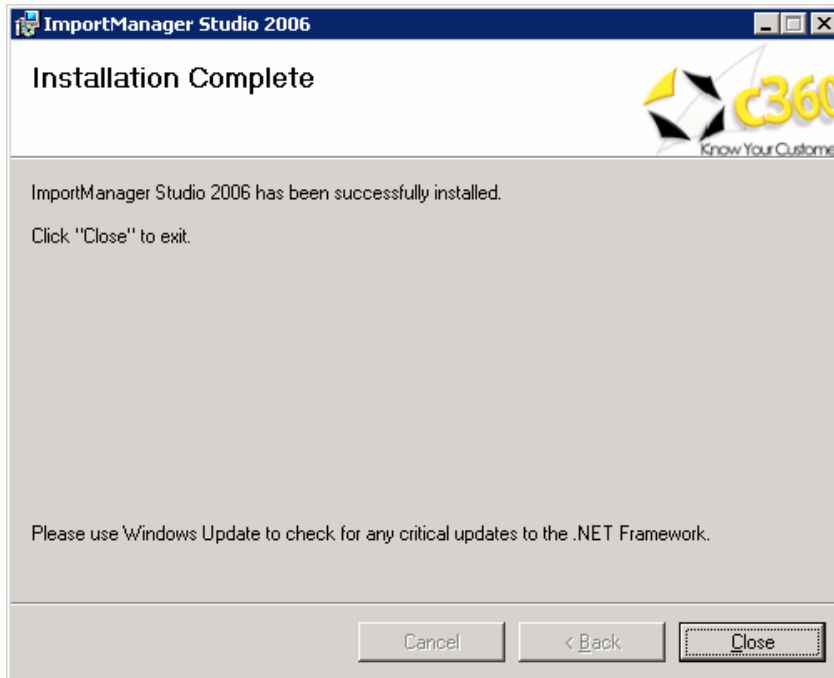

Figure d:

Figure e:

5. Click 'Close' to finish the installation

Figure f: Installation has been completed

6. c360 Import Manager has been installed successfully

Licensing _____

Evaluation Licenses

You don't need a special evaluation license of Import Manager in order to try it out. You can try all features of Import Manager without purchasing a license. This enables you to test and demo the products before installing them on your customers' or your own system. The try and buy version of Import Manager is limited to import ten objects per session

Installing Production Licenses

When you have purchased a license you will receive the license as an XML-file that you have to import from the **Settings** dialogue box in the program.

1. To import the license XML file you open up Import Manager

2. Select the **Tools**-menu | **Settings** to open the **Settings** dialogue box.

3. In the **Settings** dialogue box click the **License** tab.

4. Click the **Browse** button in the **Import license file** group at the top of the **License** tab.

5. Click the **Browse** button to select the license XML file from from its current location and click the **Open** button.

6. Now the license XML file is validated and the validation status, company name and validation period can be read in the **License information** group below. Any restrictions in the license will be displayed in the **Restrictions** field at the bottom of the **License information** group.
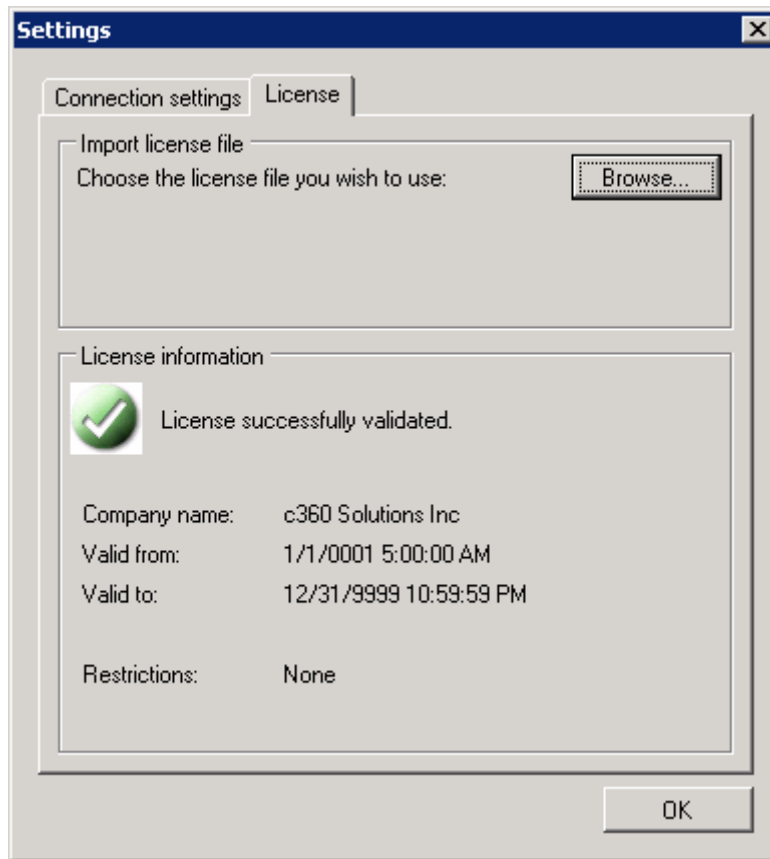
Figure 1: License Information Group also contains the Status of the License

Accessing Import Manager_____

You can access Import Manager by going to Start->All Programs -> Import Manager
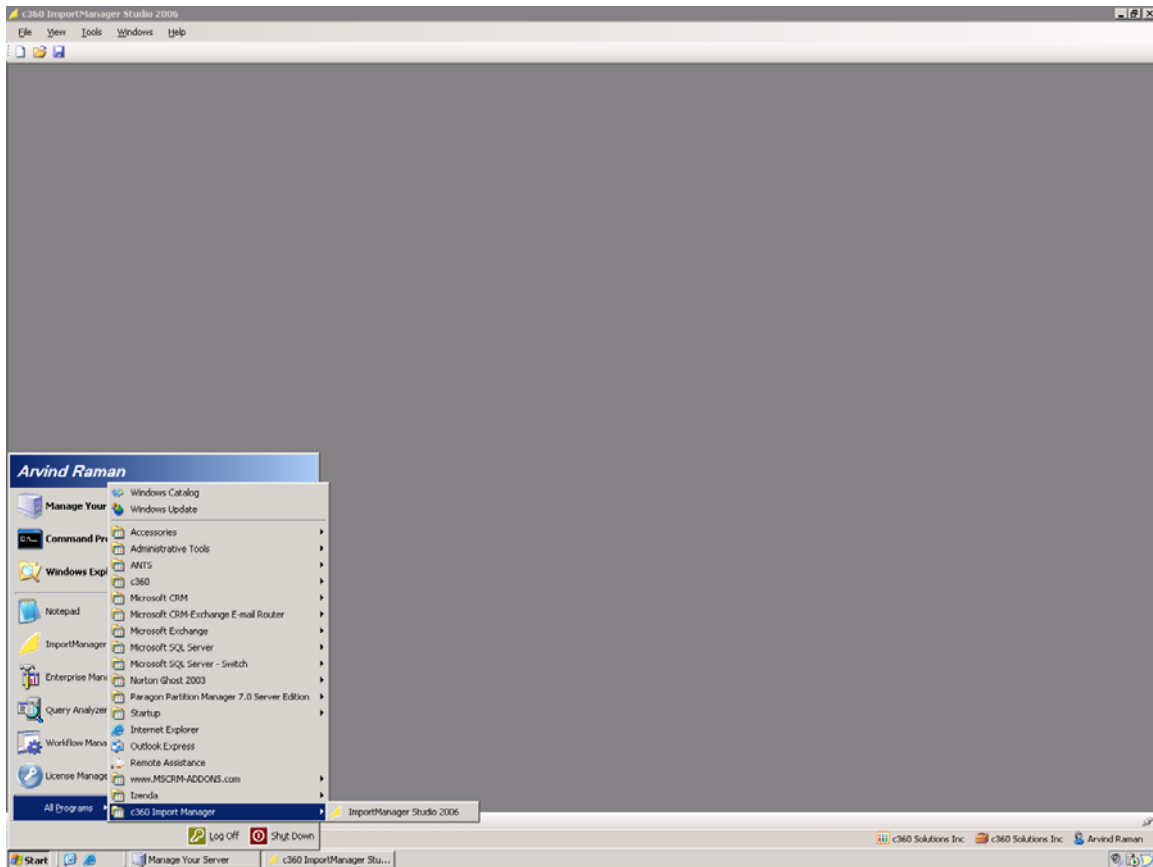
Using Import Manager _____

Overview

The basic functionality of Import Manager is to import large data sets to Microsoft Dynamics CRM 3.0 from either ODBC or text file data sources and to build relationships between the imported entities and already existing entities in the Microsoft Dynamics CRM database. You can even build relationships between the entities you import as you import them. So Import Manager can do a lot more than just import a simple comma separated text file.

To import a data source you have to define a rule set for the import. A rule associates an entity in Microsoft Dynamics CRM with entities from an external data source. The rule defines the data fields in the data source for the selected entity, sets up the relationship to other entities in the CRM database and checks that no duplicate records are being made during the import process. You can create rules for different entities and import from more the one data source in the same rule set. It is also possible to create rules for different entities in the same data source or collect information for an entity from two or more data sources.

For example, to import both Account entities and Contact entities from the same data source you have to create a rule set of two rules. One that defines the data fields in the data source for the Account entity and one that define the data fields in the data source for the Contact entity. You then create a relation in the Contact rule that creates a relation between the Contacts and their respective Accounts – both already existing and the Accounts you have just imported.
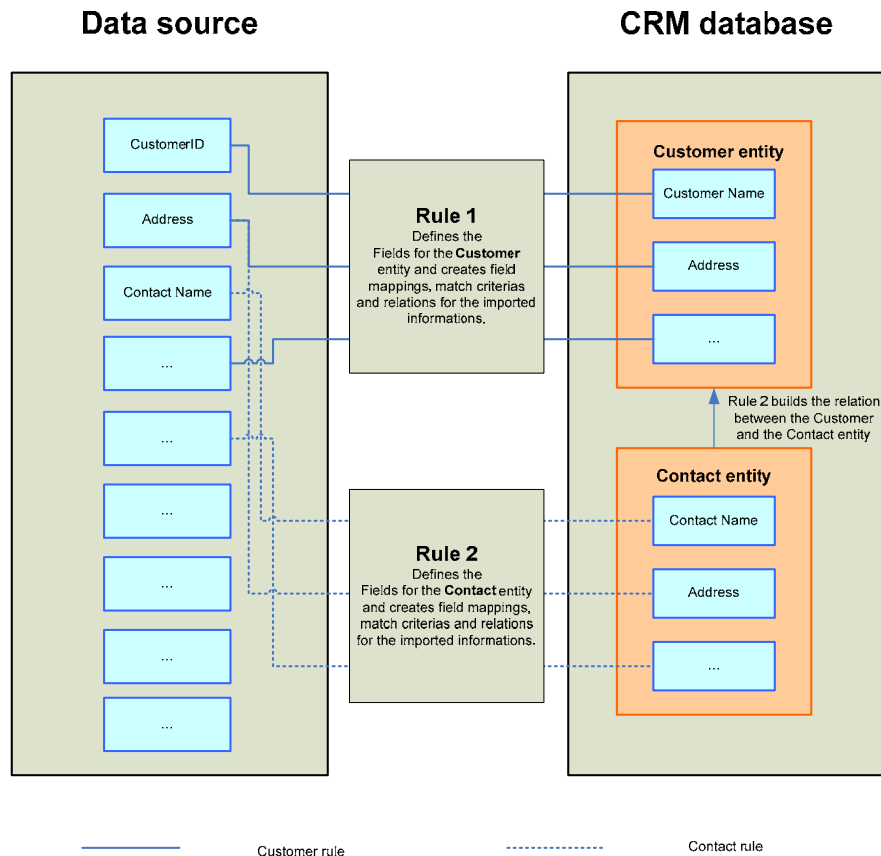
Data source

CustomerID

Address

Contact Name

...

...

...

...

...

...

Rule 1
Defines the Fields for the **Customer** entity and creates field mappings, match criterias and relations for the imported informations.

Rule 2
Defines the Fields for the **Contact** entity and creates field mappings, match criterias and relations for the imported informations.

CRM database

Customer entity

Customer Name

Address

...

Rule 2 builds the relation between the Customer and the Contact entity

Contact entity

Contact Name

Address

...

——————— Customer rule   ----------------- Contact rule

Figure 1: To import both customer entities and contact entities from the same data source; create two rules – one for each entity

Define a Rule

To import a CSV text file or an ODBC data source to the CRM database start by creating a new rule set for the import in Import Manager. Name the rule set and add the rules to the rule set. Then validate the data and perform the actual import.

Except for the choice of data source, the process is identical to importing new entities from CSV text files or from ODBC data sources.

Create a New Rule

To create the first rule in the rule set start by opening Import Manager and click the **New** button in the toolbar. Now a new blank rule set opens in the program window.

Enter a name for the rule set in the **Name**-field in the **Ruleset settings**-pane to the right. The name should be as descriptive as possible, so you can identify the import task described in the rule set. This can be handy if you have saved the rule set for later use.

To add the first rule in the rule set click the **Add new rule** button in the lower toolbar or right click **Rule Set** in the **Settings** pane and select **Add new Rule** from the shortcut menu. This opens the **New Import Rule Wizard**.
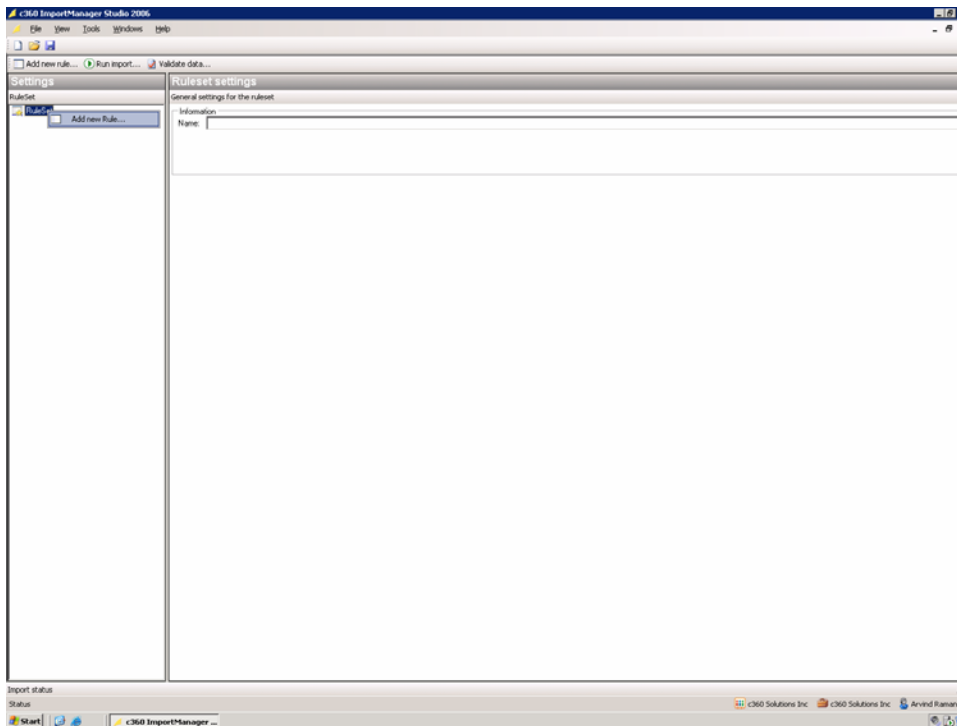
Figure 3: To Add a New Rule

Select the entity type

In the first step of the wizard you should select the entity type you are importing and the data source you are importing the data for the entity from.

You can choose between all available entities – including your own developed entities – in your CRM database. This is done from the **Entity type** list in top of the first step in the wizard. For each entity you will find the schema name and a short description of the entity's role in the CRM database.

Choose the entity in question by selecting it from the **Entity type** list.

Figure 4: Select the Entity in the Entity Type List

Choose the data source

After you have chosen the entity type you have to choose the data source from which you want to import the data. You can choose between an ODBC data source and a text file data source. It is also possible to create your own data source.

Choose an ODBC data source

To choose an ODBC data source select **ODBC Datasource** in the **Datasource** field in the **Datasource** group in the bottom part of the first step in the **New Import Rule Wizard**.

Then click the **Next** button.

Now the **Configure datasource** dialogue box opens. Here you need to select the ODBC connector in the **DSN** field and specify the query in the **SQL** field. It is possible to test both DSN and SQL specifications by clicking the respective **Test** buttons.

For the specification of the data source in the **DSN** field you can use the templates in the drop down menu. Fill in the names of your SQL-server, ServerName, DatabaseName etc. to make a connection of the desired type.

You can use standard SQL commands in the **SQL** field for the specification of the query.

When the data source is configured you click the **Finish** button to proceed with the creation of the new rule.

Figure 5: Select the ODBC Connector from the Templates in the DSN Field and specify the query in the SQL Field

Choose a text file data source

To choose a text file data source select **Text file datasource** in the **Datasource** field in the **Datasource** group in the bottom part of the first step in the **New Import Rule Wizard**.

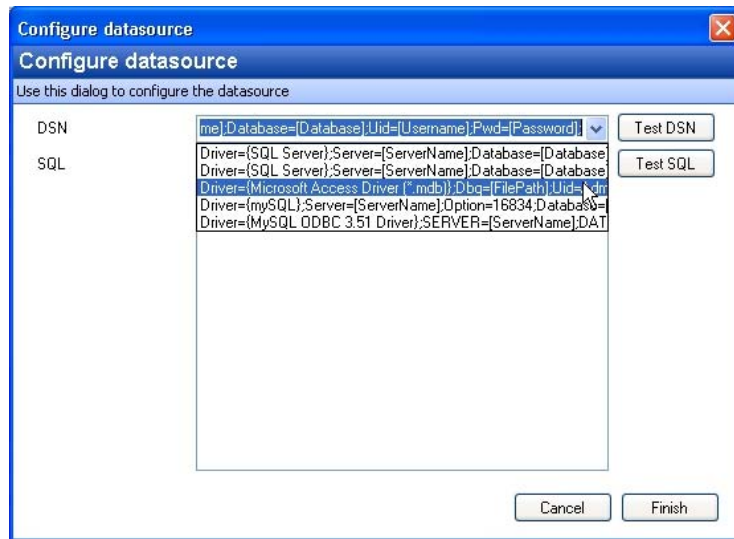Now the **Configure datasource** dialogue box opens. Here you can specify which text file to import, which separator character is used, whether the file contains headers and what type of encoding the file is using.

You can import all kinds of text files with data fields separated by a semicolon, comma, colon or tab and data records separated by the carriage return character (ASCII(13)). The most common file type is .CSV. This is often used for data export by Microsoft Office Excel, but also normal .TXT files and other text file types are supported.

Specify the file path to the text file you want to import by clicking the **Choose** button to the right of the **File path** field or enter the file path in the field directly.

In the **Separator** field you select what separator character the file is using to separate the different data fields. You can choose between **Semicolon**, **Comma**, **Colon** or **Tab**. Select the one in use by clicking the list button to the right in the **Separator** field and click the character used in the text file.
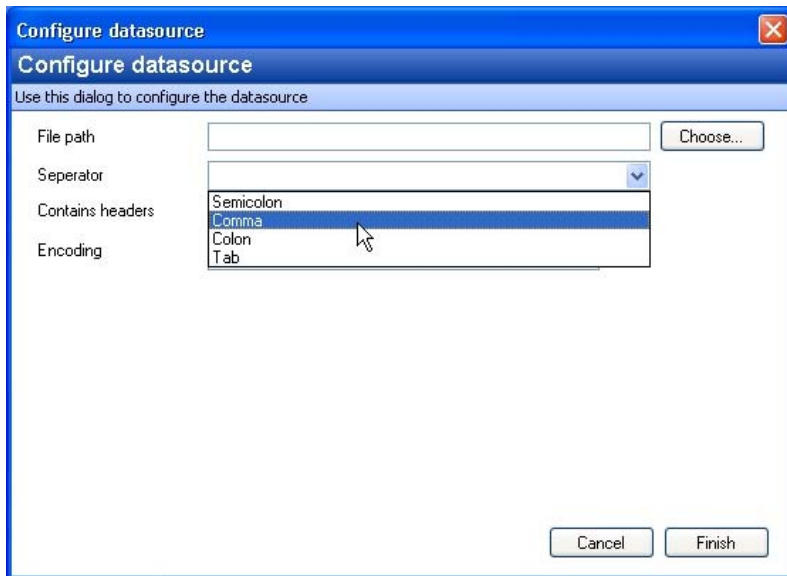
Figure 6: Select the Separator character from the list

Select the **Contains headers** field if the text file data source contains headers for the different data fields as the first line in the text file. The headers will be used as field names when you build the mapping between the data source file and the CRM database, create relations to other entities in the CRM database and specify conflicts etc. later in the wizard.

Finally select the character encoding used in the text file. As standard the encoding is set to **Unicode (UTF-8)** in the **Encoding** field, which is the most commonly used encoding. But you can choose between a long list of encodings for different languages and operating systems to make sure that the data source is readable and produces readable inputs in the CRM database.

Click the **Finish** button to finish the definition of the data source and close the **Configure datasource** dialogue box.
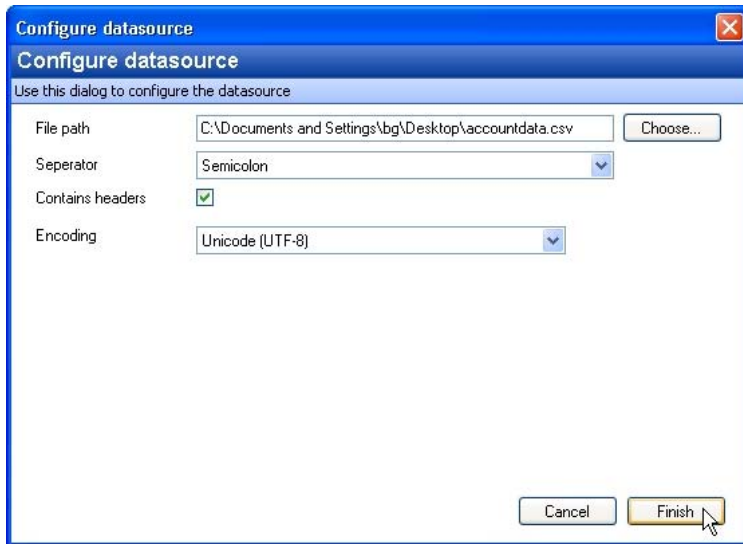
Figure 7: Click the Finish Button once the Data Source Configuration is done

Mappings

You are now returned to the Import Manager main window. So far you have told what entity you are building with the rule and what data source you want to find the fields for the entity in.

Now you have to map the relevant fields in the records from the data source with the fields of the chosen entity type in the CRM Database.

Start by selecting a relevant data field from the data source in the **Datasource** field to the left. Then find the corresponding field in the entity from the Microsoft Dynamics CRM database in the **CRM Field** field to the right.

Click the **Add** button to add the combination of data fields to the **Criteria** list. Repeat this process as many times as needed to build the information for one instance of the selected entity type.
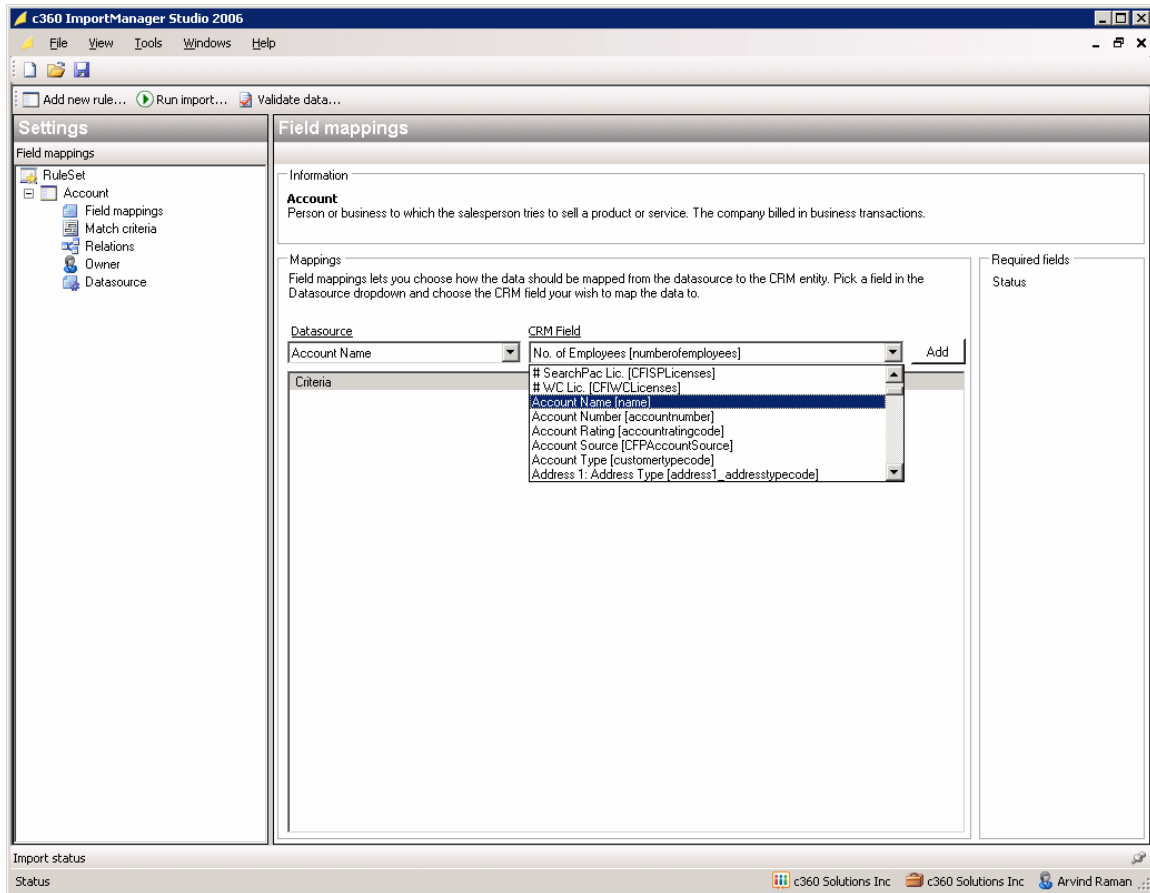
Figure 8: Match the Corresponding Fields in the Data Source and CRM Entity

Normally not all the fields of the entity are available as separate fields in the data source. Fields in the entity that are not matched with fields from the data source normally are created as empty fields during an import. You can change the settings for this in the Rule Settings. We will return to this matter in the Setting section later in this chapter.

When all field matches have been set up you have defined what fields from the data source should be used as input data for the new records of the given entity. The new records will be created when the import process is executed. We will return to this later in this chapter.

Match Criteria

To eliminate the creation of records already in the CRM database, click **Match criterias** in the console tree menu to the left. This opens the **Match criterias** settings in the right pane of the program window.

Here you can define a match criterion so that you don't create duplicate records of the given entity. If a match is found for an existing record, the existing record by

default will be updated with new data values from the field specified in the matching record in the data source. You can add several match criteria for each entity type in the rule set.

If, for example, you use the account's phone number as the account number you can make a match criterion that checks if a given phone number already exists as an account number in the CRM database. First you select the name of the phone number field from the data source in the **Datasource** field, then select **Equals** in the **Operator** field and finally select **Account Number [accountnumber]** in the **CRM Field** field. Click the **Add** button to add the criterion to the match criteria for the given entity type in the rule set.

You can expand the match possibilities by selecting **Contains** in the **Operator** field instead of **Equals**. This allows matches on incidents where the value of the compared fields only matches partly. For example, "Microsoft" will match with "Microsoft Corp." when you select **Contains**. This will not be the case if you select **Equal**.
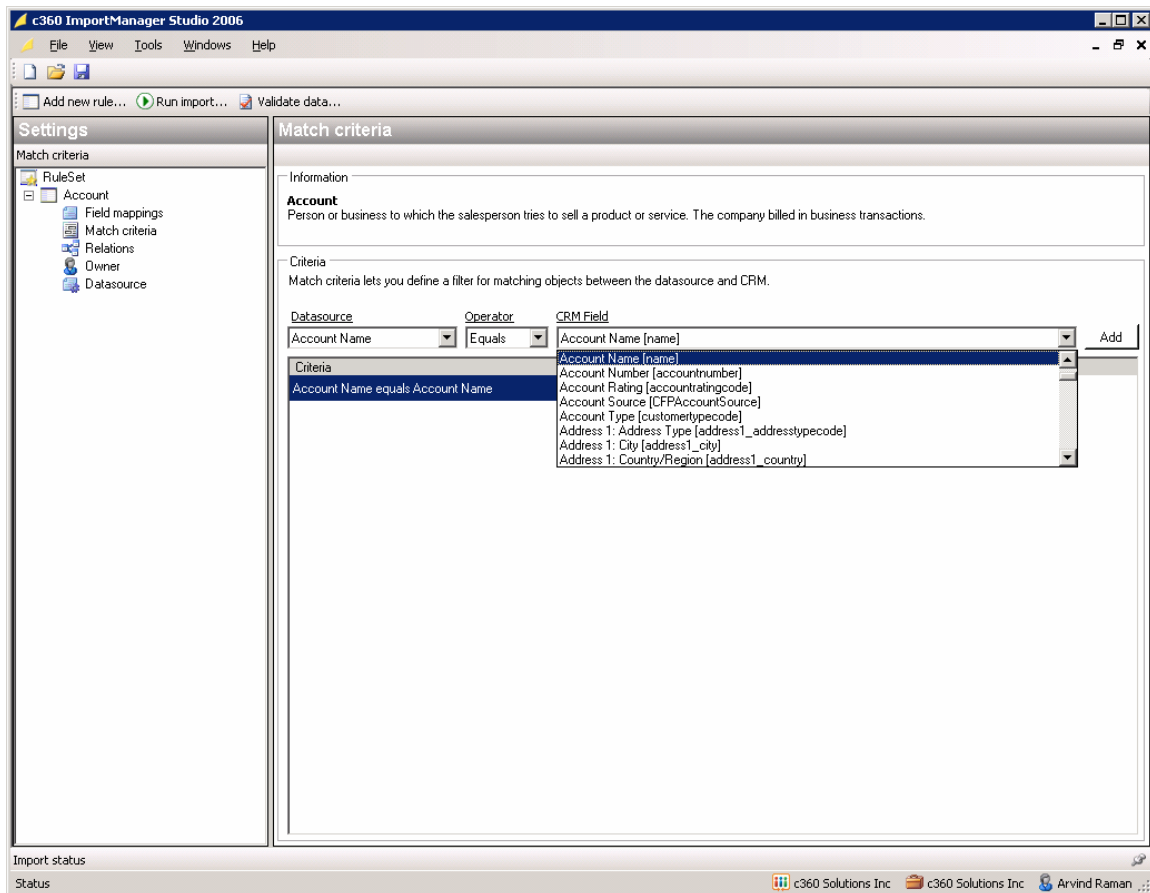

Figure 9: Click the Add button to add the match criteria

Every time a match is found doing the import process the given entity is updated with the information from the related fields in the data source. Therefore it is very important that all information in the data source fields is as correct and updated as

possible. Otherwise, the import will erase newer and more up-to-date information in the CRM database.

Again, it is possible to change the way that ImportManager Studio handles match situations in the rule set settings which we will return to later in this chapter.

Relationships

If the entity type you are importing relates to another entity in the CRM database you can create this relationship in the import process, e.g. relate a Contact entity to a given Account entity.

If you are importing contacts from an external data source you can use the company name or the account number to create the relationship between the Account and the Contact. You can even import both Accounts and Contacts entities and create the relation between them in one single rule set. To do this start by setting up the first rule in the rule set so that it defines the Account entity. Then set up a second rule in the rule set that define the Contacts and create a relationship to the Account entity in the second rule.

To add a relation between the entity-type you are importing and another entity in the CRM-database click **Relations** in the console tree. Now **Relations** opens in the right pane of the program window.
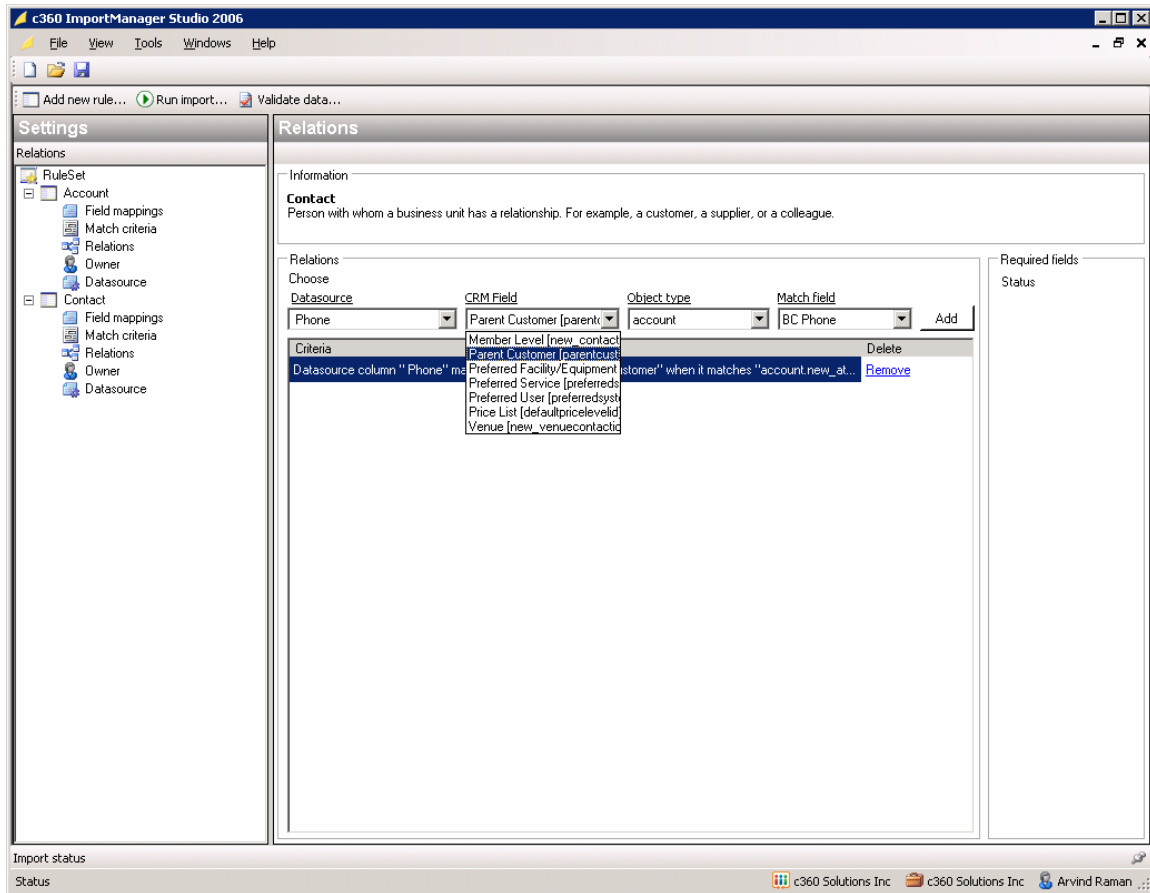
Figure 10: Add Relationships between the entity type you are importing and another entity in CRM by clicking on Relations

In the **Datasource** field you select the field name in the data source that defines the value for the relation.

In the **CRM Field** field you can choose between the lookup fields defined for the given entity you are creating the relation from, e.g. **Parent Customer** if you are building a relationship between a Contact and an Account.

In the **Object type** field you can select the corresponding entity type for the lookup field selected in the **CRM Field** field. The chosen entity type defines which fields can be selected in the **Match field** field as this only contains fields from the selected entity.

In the **Match field** field you select the field name in the chosen entity type that should match the selected field name in the data source. If the values of the selected field in the data source and in the matching field of the entity are identical, a relation can be build between the two entities.

1. Select the field in the **Data source** that identifies the record you want to make a relation to

2. Select the lookup field in the entity that you are importing. Only available lookup fields are displayed

3. Select the entity that the lookup field relates to. Only available entity types are displayed
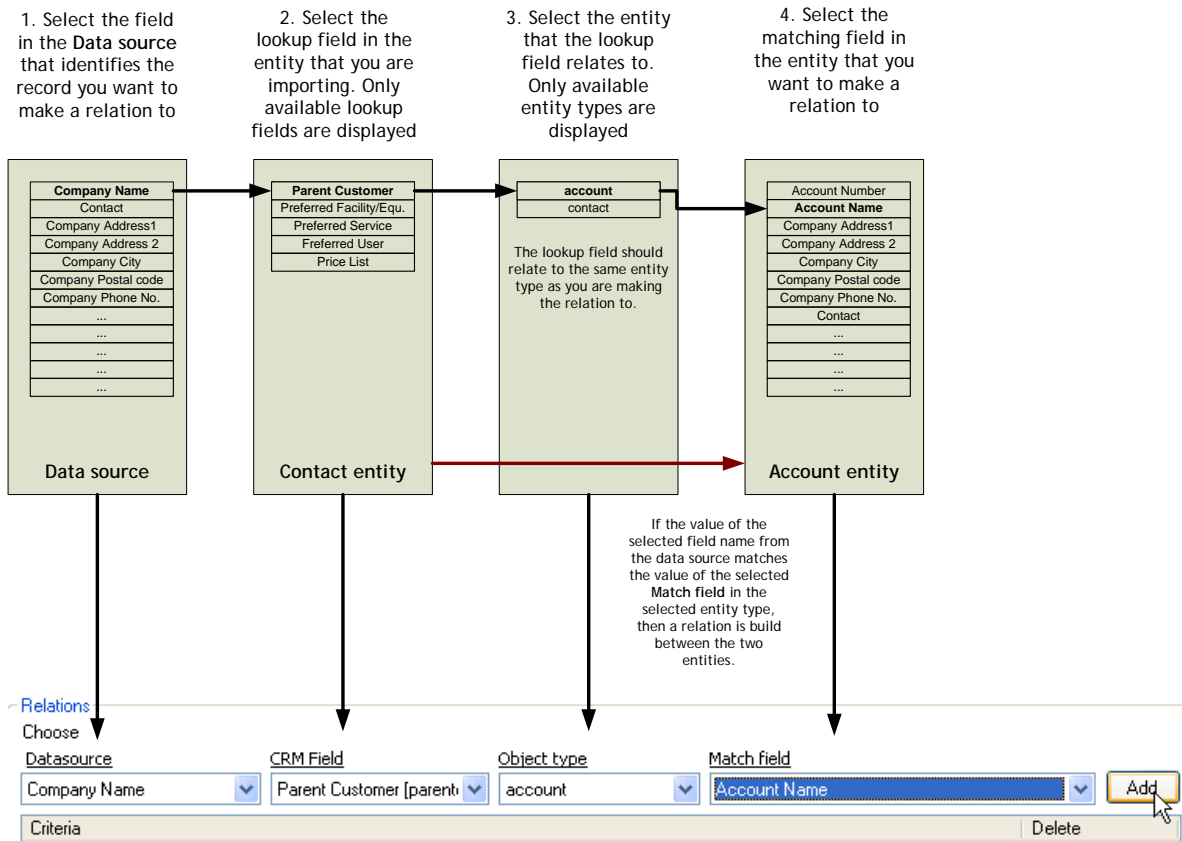
4. Select the matching field in the entity that you want to make a relation to

Company Name
Contact
Company Address1
Company Address 2
Company City
Company Postal code
Company Phone No.
...
...
...
...
...

Data source

Parent Customer
Preferred Facility/Equ.
Preferred Service
Freferred User
Price List

Contact entity

account
contact

The lookup field should relate to the same entity type as you are making the relation to.

Account Number
Account Name
Company Address1
Company Address 2
Company City
Company Postal code
Company Phone No.
Contact
...
...
...

Account entity

If the value of the selected field name from the data source matches the value of the selected **Match field** in the selected entity type, then a relation is build between the two entities.

Relations
Choose

Datasource	CRM Field	Object type	Match field	
Company Name	Parent Customer [parent	account	Account Name	Add

Criteria   Delete

Figure 11: How to choose the Parameters for a relation

If you import contacts from a CSV- or other text file and want to create a relation between the imported Contact entity and an existing Account entity in the Microsoft Dynamics CRM database select the field name in the data source in the **Datasource** field that match a unique data field in the Account entity in the CRM database, e.g. **Company Name** or **Main Phone**

Then select the field in the entity in the CRM database that is used as a lookup field for the relation you are planning to create. If you are creating a relation between Contacts and Accounts, you have to choose the field name in the Contact entity that works as lookup field for a related Account, which in our example will be the **Parent Company** field.

Now you have to choose between the two entities for which **Parent Company** works as a lookup field. The relation works both ways, but if you select the same entity as you are importing, the lookup field will point at its own record and no relation is being made. As you want to create a relation between a Contact and an Account entity and you are currently defining the rule for the import of the Contact entity, you will have to choose the entity that the Contact entity shall relate to – in our example **account** – as the entity type in the **Object type** field.

When you have chosen the entity type to be an Account, you now have to choose the field that should match in the Account entity to make it valid to make the relation. If you have selected **Company Name** in the **Datasource** field you have to choose **Account Name** in the **Match field** as the values of the two fields have to be exactly the same to ensure that a relation between the contact and the account entity is valid.

Settings

For each rule in the rule set you can change the settings for conflicts, error handling and user. To display the settings for each rule in the rule set, click the rule name in the tree menu in the left pane of the program window. Then the settings for the selected rule are shown in the **Rule settings** pane to the right of the program window.

Conflicts settings tell the program what action should be taken when one or more records in the CRM database fits the criteria's specified in the **Match criterias** section of the rule. There are different actions available for unique, no or multiple matches. Error handling settings tell the program what action should be taken if an error is encountered in the import process. There are different actions available for property, pick list and lookup errors.

The owner settings set up the system owner for all new objects created during the import process. If the **Use default owner** field are selected the user logged in on the computer when the import process is executed will be created as the owner of all new records created by the import process. If you want to specify different system owners for each new record deselect the **Use default owner** field and choose a matching field for the system owner in the fields that appears below.
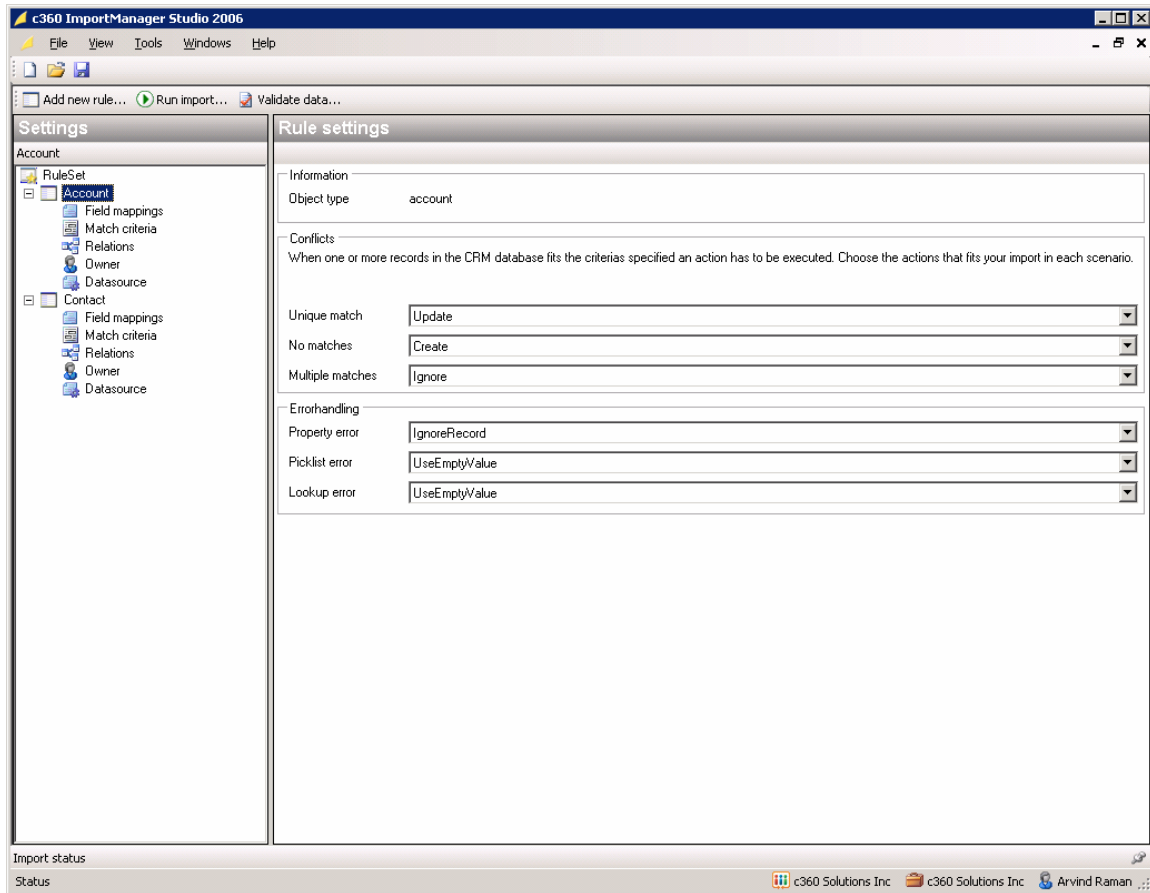
Figure 12: Display the Settings for each rule

Information

The **Information** group at the top of the **Rule Settings** pane describes what object type the rule handles. You can only change the object type by deleting the existing rule for this object type and creating a new rule for the desired object type in the rule set.

Conflict settings

Conflicts settings tell the program what action should be taken when one or more records in the CRM database fits the criteria's specified in the **Match criterias** section of the rule. You change the conflicts settings in the **Conflicts** section of the **Rule settings** pane.

There are different actions available describing what to do if a unique, no or multiple matches are found during the import process. For example, if a **Company Name** field in the data source has a unique match in the **Account Name** field in the Account Entity of the CRM database, you can choose to either update, create or ignore the matching account object.

Normally you would choose to update a matching object as there is no need to create duplicate instances of the same account. Therefore **Update** is the default value for the **Unique match** field. But if you are not certain of the data quality of the data source – e.g. how up-to-date the information in the data source is – it might be better to select **Ignore** as the action, if a unique match is encountered during the import process. Then the information for account objects already created in the CRM database is not overwritten with information that may be older. You can read more about this in the Best practices section of this manual.

The same decisions go for the **No matches** and **Multiple matches** fields in the **Conflicts** section of the **Rule settings** pane.

Normally if there is no match in the CRM database for a given object in the data source, you want the object to be created in the CRM database. Therefore the standard value for the **No matches** field as default is **Create**.

But in a situation where you are running an update on, for example, all existing accounts in the CRM database you are not interested in creating new account records as it is likely that the missing match in the CRM database is due to misspelling of an existing Account name in the data source. Therefore in these situations it would be logical to choose **Ignore** in the **No matches** field. You can read more about this in the Best practices section of this manual.

If multiple matches are found, you normally want to ignore them, as this has to be sorted out manually. But if it is convenient in the situation, you are able to select **Update** or **Create** for this conflict scenario also, for example, to create a new record and then let the users sort out what is the correct action for the imported object. You can read more about this in the Best practices section of this manual.

Error handling

If a property, pick list or lookup error should occur in the import process you can choose how the program handles the record in question. You choose the appropriate action for the different error types in the **Error handling** group in the **Rule Setting** pane for each rule in the rule set.

In case of a property error you can choose the appropriate action in the **Property error** field in the **Error handling** group. You can choose that the import process shall ignore the record (**Ignore**), ignore the property (**IgnoreProperty**) or create the record with no value specified for the property in question (**UseEmptyValue**).

You can choose between the same options for pick list and lookup errors. Please refer to the Best practices section for more information on choosing the right action for different scenarios.

Owner settings

When you create a new record in the CRM database you normally become the owner of the record. When you use Import Managerfor importing new records in the CRM

database, by default the owner of the records imported will be set as the default user – in other words the user logged in on the computer running Import Manager. But if the data source you are importing contains owner information for the different records and if the owner information in the data source corresponds to the user names in the Microsoft Dynamics CRM system you are able to create different owners for the imported records in the import process.

This is done by deselecting the **Use default user** field in the **Owner** group of the **Rule setting** pane. Then you can select the matching field in the data source in the **Matching field** field and what field in the CRM database that maps to it in the **maps to** field. Both fields are only visible when the **Use default user** is deselected.

Validate data

When all rules in the rule set has been specified you can validate that the rule set works the way it was intended to by clicking the **Validate data** button on the second toolbar in the top of the ImportManager Studio window.

No import is actually being made. The program only simulates the import process with the rules in the rule set. In the **Import status** pane you can follow the simulated import process. The pane opens in the bottom of the program window when the **Validate data** button is clicked.

From the simulated import begins to the last row in the data source has been processed the **Import status** pane shows you how each row is processed and what actions are being taken based on the rules in the rule set.

Each action taken produces a line in the **Import status** pane that describes what action has been taken and what the result of that action was. So you can follow the process very closely and identify what has been done. If an error occurs performing the process you can also identify what row is causing the error, the type of the error and what action has been taken on the error. You can read more about the different errors and how to solve them in the Knowledge base for ImportManager Studio at CRM Extensions or your local CRM Extensions Partners homepage.

At the bottom of the **Import status** pane you can see the total number of records processed, how many records the rule set created, updated and ignored during the simulated import process and how many times an error occurred.

You can study the results in the **Import status** pane by scrolling up and down in the list or export the results as a text file for further reference by clicking the **Save log** button to the right of the **Import Status** pane.

Figure 13: See the status for each action taken and save the log

Save the Rule set

When the rule set is created and tested to be working as intended, it is a good idea to save the rule set. To do so click the **Save** button on the upper toolbar or select the **File** menu | **Save**.

Now the **Save As** window opens. Select a location for the rule set definition file in the **Save in** field at the top of the **Save As** window. Then give the rule set a good, descriptive name that clearly indicates what the rule set is used for in the **File Name** windows at the bottom of the **Save As** window. It is a good idea to use the same name as specified in the **Name** field of the **Ruleset settings** pane.

To save the rule set definitions with the given name click the **Save** button at the lower right corner of the **Save as** window.
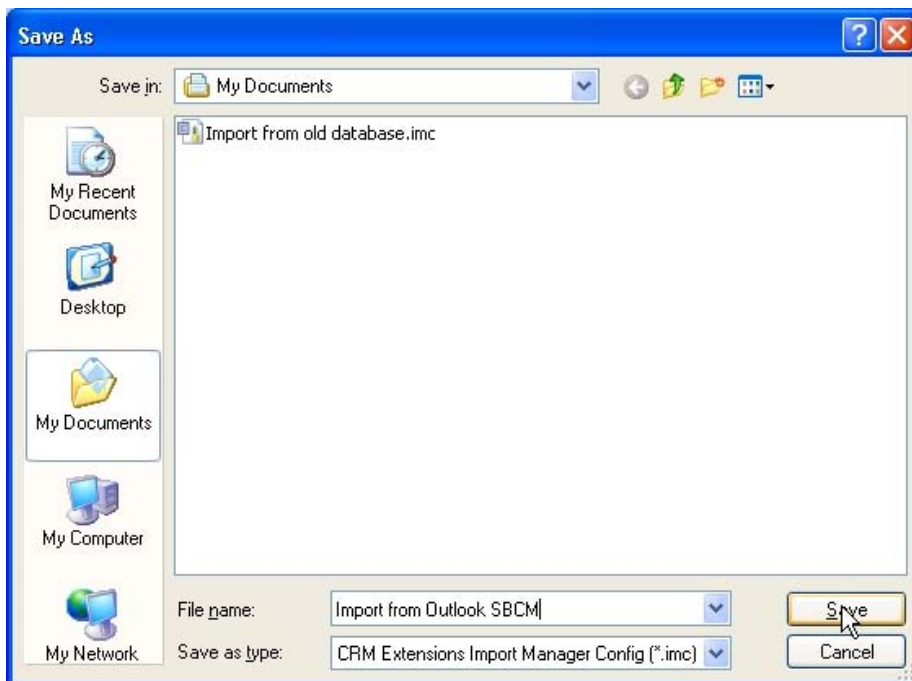

Figure 14: Save the Rule Set with a descriptive name

You can open already saved rule sets by clicking the **Open** button on the upper toolbar or by selecting **File** menu | **Open**.

Run the import

When you have validated that your rule set successfully will import the defined entities from the data source to the CRM database you are ready to perform the actual import.

This is done by clicking the **Run import** button on the lower toolbar at the top of the program window. Now the **Run import wizard** opens. Here you can choose which rules in the rule set you want to run. By default all rules in the rule set are selected. But if you only want to run one of the rules, deselect the others and click the **Run import** button to start the import process.
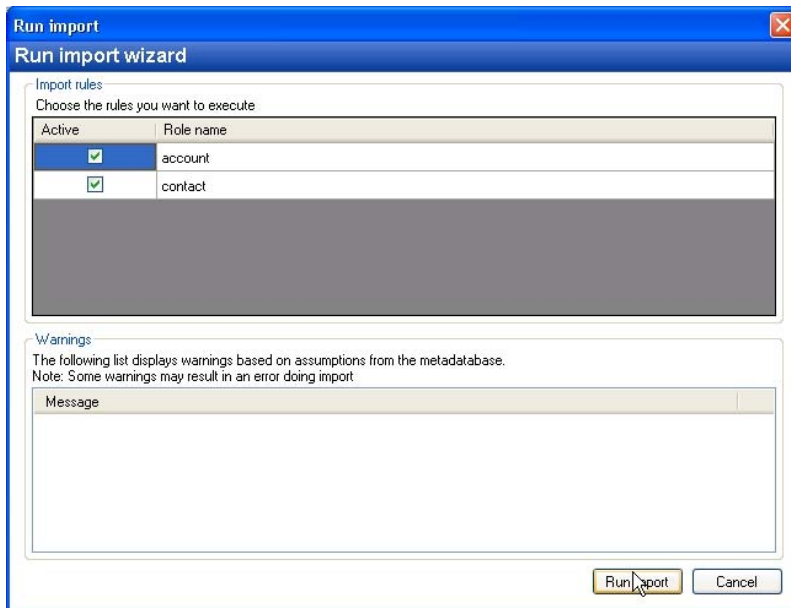

Figure 15: Select which rules you want to run

Based on assumptions from the metadatabase the **Run import wizard** is able to warn you of possible errors in the **Warnings** group at the bottom of the **Run import wizard** window. If ignored, these warnings can result in errors during the import process. You can read more about these errors and what they mean in the Knowledge Base.

The import process is done and works in the same way as validating the rule set except that this time the actual import is taking place and the data from the data source are being imported to the CRM database according to the specified rule set.

As when you validated the rule set you can follow the import process row by row in the **Import status** pane at the bottom of the program window. Again you can study the results in the **Import status** pane by scrolling up and down in the list or

exporting the results as a text file for further reference by clicking the **Save log** button to the right of the **Import Status** pane.

When the import has been done the records for the specified entities has been created in the CRM database and the users can start working with the new records.

Schedule import

It is possible to automate the import process and run a saved rule set as a scheduled task at a specific time. This is handy if you need to update the entities defined by the rule set on a regular basis, e.g. if you want to update all accounts with the latest information from your financial system every night or want to update all account address information every month.

To do so start by creating the rule set for the import you want to schedule. When that is done and the rule set is validated you simply save the rule set as a scheduled task by selecting **File** menu | **Save as Scheduled Task**. This saves a definition file for the Task Scheduler in Windows XP.

Now **Schedule settings** appears at the bottom of the tree view in the **Settings** pane to the left in the ImportManager Studio window – just below the rules in the rule set.

Schedule a task from Import Manager

To schedule when to run the rule set click the **Schedule settings** to open the **Scheduled Task Settings** in the right pane of the program window. Here you click the **Edit schedule** button to open the Task Scheduler dialogue box for the task.
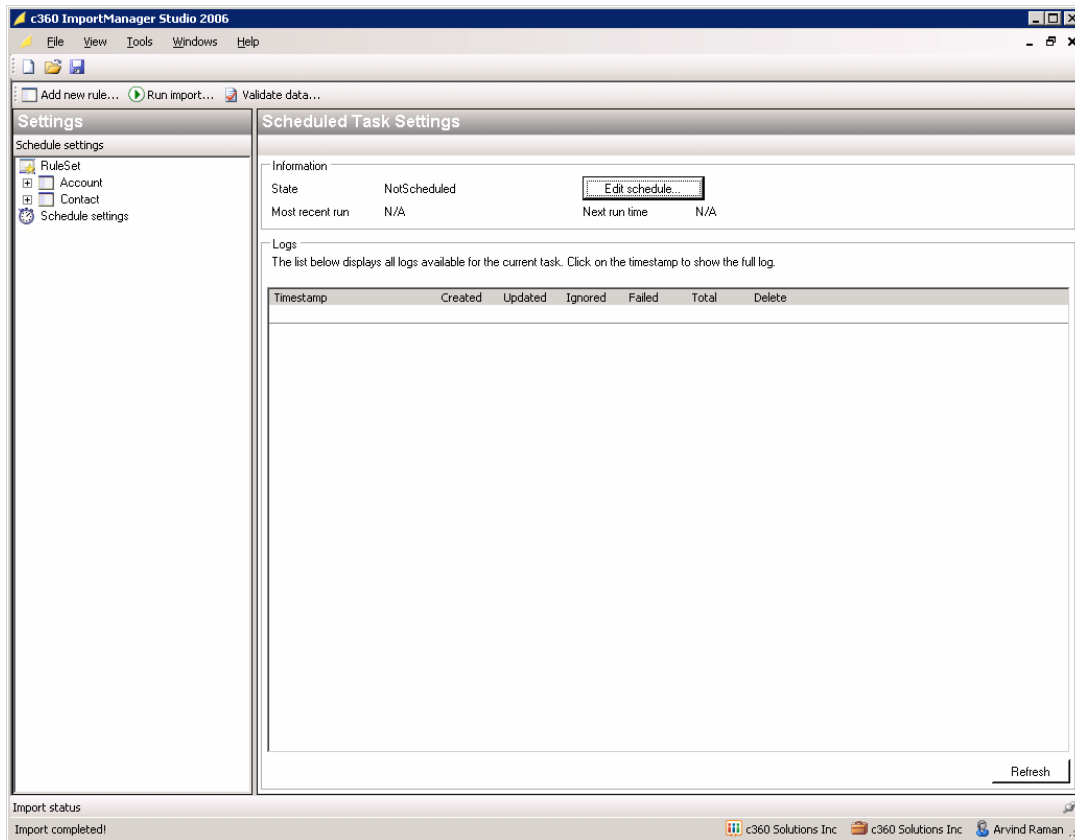
Figure 16: Click Edit Schedule to open the Task Scheduler Dialogue

It consists of the tabs: **Task**, **Schedule** and **Setting** as you know it from Windows XP's Task Scheduler. Here we will only focus on the fields of interest on the three tabs.

On the **Task** tab you are able to change the user account logged in when the scheduled task is executed. This can be handy if the system settings require that a special user account is used for the import. Remember to specify a password for the account by clicking the **Set password** button.
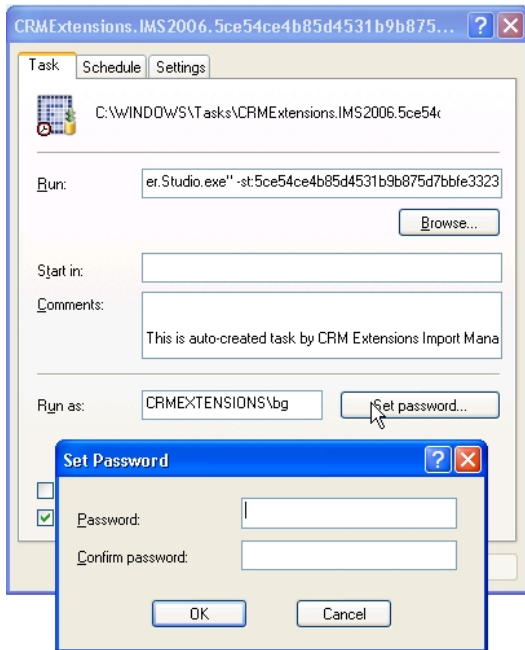
Figure 17: Change the User Account to schedule the task

On the **Schedule** tab you can specify when the task shall be executed. If you want the scheduled task to be executed every evening at 9 PM, click the **New** button on top of the **Schedule** tab. Select **Daily** in the **Schedule Task** field, specify the starting time in the **Start Time** field, here 21:00, and select the offset between each occurrence of the task in the **Every** field in the **Schedule Task Daily** group that appears when you select **Daily** in the **Schedule Task** field.

It you want the task to be executed every day set the **Every** field to '1'. You can also choose to run the task for every two days, every year of whatever timeframe is relevant by entering 2, 365 or the number of days between every occurrence of the task in the **Every** field of the **Schedule Task Daily** group. You can of course do the same by selecting another value in the **Schedule Task** field.

It is also possible to run scheduled tasks at system startup, at logon or whenever the computer is idle by selecting the appropriate value in the **Schedule Task** field.

It is possible to schedule more occurrences of the task by clicking the **New** button on top of the **Schedule** tab again and schedule a new time to run the task. This can be done as many times as necessary.
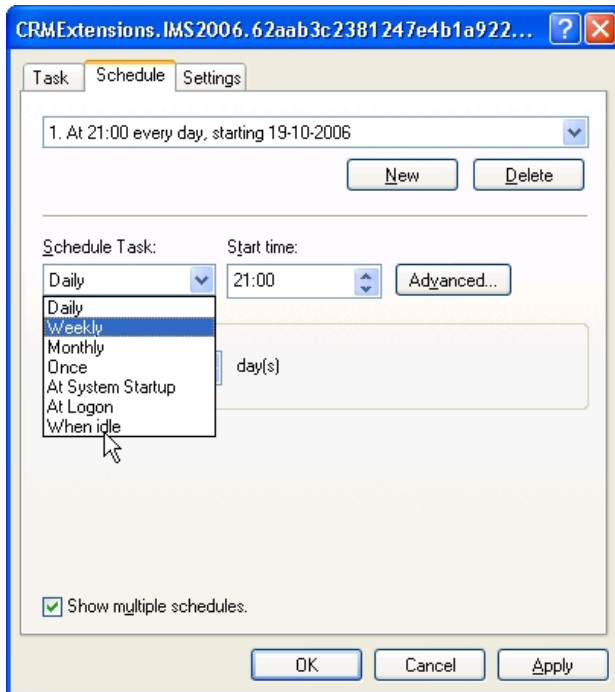
Figure 18: Run Scheduled tasks at system startup

On the **Settings** tab it is possible to stop the task if it is still running after a specified number of hours and to delete a task, if it is not scheduled to run again. In the **Idle Time** group you can specify for how long the computer has to be idle before a scheduled task is executed and for how long time the computer will try to execute the task, if the computer is not idle on the scheduled time.

Finally you can select not to run the task if the computer is running on batteries or if battery mode begins. It is even possible to wake the computer from standby or hibernation to run a scheduled task.
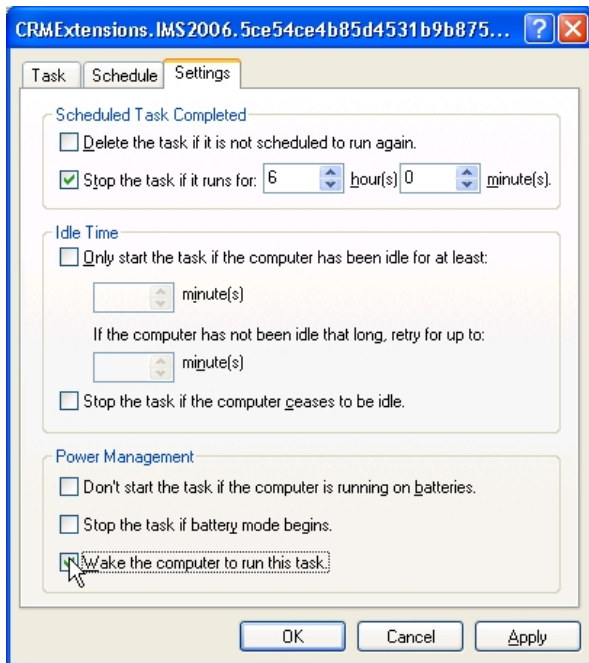
Figure 19: Wake the computer from Standby or Hibernation to run a task

Schedule a task from Task Scheduler

It is also possible to schedule the task from the Task Scheduler in the Control Panel. Open the **Control Panel**, open **Scheduled Tasks** and click **Add Scheduled Task**.

This opens the **Scheduled Task Wizard**. Click the **Next** button and select **Import Manager** from the list and click the **Browse** button to find the scheduled task, you created in Import Manager by saving the rule set as a scheduled task. You find the scheduled tasks in the same folder as you save all other rule sets created in Import Manager(the default folder is **My documents**).

Figure 20: Click the Browse button to find the scheduled task

Click the **Next** button to proceed. Now specify a name for the new scheduled task. As default the scheduled task will get the same name as you gave the rule set when you saved it in ImportManager Studio. Then select how often to execute the task and click the **Next** button.
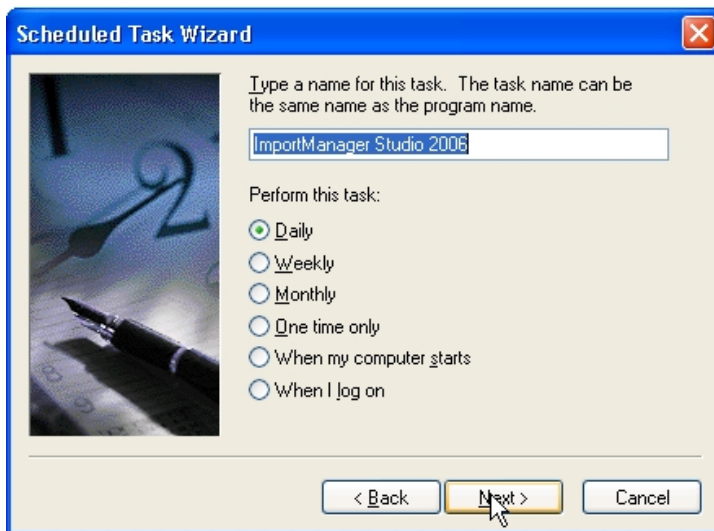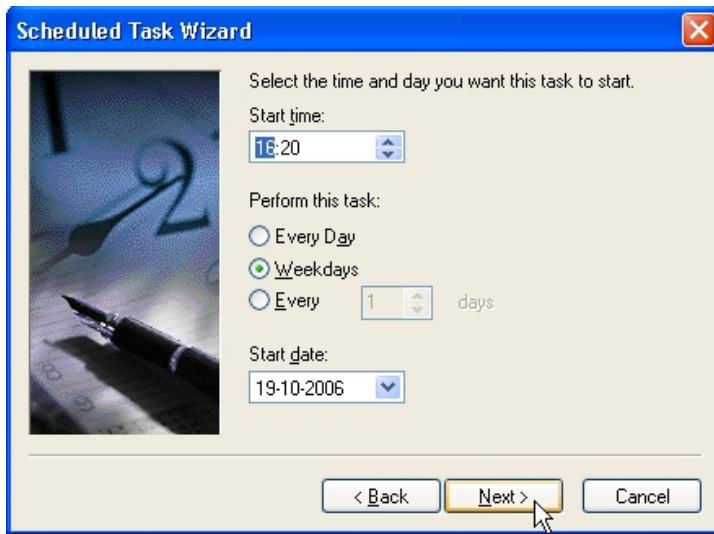

Figure 21: Specify a name for the new scheduled task

Now specify the time and day you want this task to start for the first time and how often it shall be performed.

Figure 22: Specify the time and day you want this task to start and how often it should be performed

Click the **Next** button to proceed, specify the user account and password and click the **Next** button again.

Finally select the **Open advanced properties for this task when I click Finish** field and click the **Finish** button. Then the Task Scheduler dialogue box opens for the new task. It looks exactly the same as described above in the previous section.