



# FAQ - How do I Import a Document Register from Excel?

## Question

How do I import a document/drawing register in Microsoft Excel into QDMS?

## Answer

### Step 1: Format your register in Excel

- a) QDMS comes with an Excel template that includes a macro to convert the Excel file to a Database (DBF) file that can be imported into QDMS. The Excel template is called MDR.XLS and is found in the QDMS folder. (A copy can also be found on the QA Software CD in the \Valupack\FAQs\QDMS folder.)
- b) Open MDR.XLS in Microsoft Excel

**Note:** You may be prompted with a security warning and should select Enable Macros if you wish to use the file conversion. To import direct from Excel then do not select Macros.

- c) The first row of this template contains the names of the standard fields in the QDMS Master Document Register. Enter or Copy and Paste your data into the appropriate columns of this template. (Note: If you have extra fields in QDMS, you may add the name of these fields to Row 1 yourself (Column Header) If these fields are either numbers or dates, make sure that Row 2 contains the same type of information).

### Step 2: Saving the Excel File

- a) From the top menu, select **QDMS** and then **Save as DBF**
- b) Give the file a name and click **OK**.
- c) Close Excel.

	A	B	C	D	E	F	G	H
1	DocumentNo	Rev	Sts	Title	Revision	Received	ForReview	Reviewed
2	AB-111	0	0	-	FLASH GUN - DWG FORMAT	-	5/05/1999	-
3	AB-152	1	1	-	ATTRIBUTES DEMO DRAWING	30/01/1996	7/02/1996	-
4	AB-999	0	0	C	INTERNET CALCULATION EXCEL WORKSHEET	-	-	-
5	AN-123	0	0	-	FLOOR DESIGN	16/02/1996	6/05/1999	-
6	CA-154	2	2	-	FLASH GUN DXF FORMAT	16/02/1996	6/05/1999	-
7	CA-155	2	2	-	DEMO TXT FILE	1/02/1996	6/02/1996	-
8	CI-156	0	2	D	WORD 97 DEMO FILE	16/02/1996	6/05/1999	-
9	DO-157	1	1		DOOR & WINDOW SCHEDULE - GROUND FLOOR	2/02/1996	10/02/1996	-
10	DO-158	0	0		STAIR DETAIL	3/02/1996	9/02/1996	-
11	EF-159	0	0		SEXTANT	4/02/1996	17/02/1996	-
12	EQ-160	1	1	-	3D - Site Details	5/02/1996	15/02/1996	-



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### **Step 3: Import into QDMS**

- a) From the QDMS Project you want to import the Data into, choose **Wizards** and then **Import-Data Wizard**
- b) At the first screen leave the default settings 'Documents in a database file into the Master Document Register' and click **Next**.
- c) Select the file you created in step 2 above by using the **Select File** button. Click **Next**.
- d) View your documents to check that they are all present and then click **Finish** to complete the process.

**Note:** In step (d) above if any of the documents are highlighted in red then they have been rejected for import by the QDMS validation engine. In this event the Next button will be activated and all rejected documents will appear on the next page with the reason for rejection. It is advised at this point to abort the import routine and resolve the issues in the Excel import file.

### **Excel File document requirements**

For each document to be imported into QDMS it must meet the following criteria:

- Contain a Document Number, Revision (Rev) number, Status (STS) and Document Title.
- The Revision number must exist in the QDMS configuration tables.
- The Revision number must be the same or higher than the current revision if this document already exists in the QDMS Master Document Register.

### **Further information on issue**

For further information, please contact QA Software Pty Ltd.

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