

Web Import




The Web Import Tool allows the client to directly upload, validate and import their data files through the CWS application.

If you are given Web Import Tool Access rights, please use caution when importing data into any site. You will be responsible for ALL data you import.

Please reference the official [Web Import User Guide](#) for more in-depth instructions regarding

Please note that depending on your Beeline Platform settings, this feature may, or may not, be turned on. Reach out to your Beeline Representative to adjust settings.

How to Navigate to Web Import via Self-Service:

1. Log in to the Beeline Platform using your *username* and *password*. Your Home page appears.
2. Click the **My Preferences** icon  at the top right of your page in the Header Menu.
3. Hover over the **VMS Settings** menu item and click **Data Management**.
4. Click **Web Import** from the list of available Data Management Self-Service features to be taken to the **Import** screen.

How to Create an Import:

Please see [Web Import User Guide](#) for detailed instructions. Please see the instructions below for a quick reference.

Complete steps 1-4 above.

5. Click **Add New** to upload a file and be taken to the **Import – Status: Creating screen**.
6. On the Import-status: Creating screen, expand the Import type drop-down list and select the import template. Once your selection is made, a download link for that import template will automatically display to the right of the Import type field. The **Validate** button is now visible in addition to the template download link.
7. Enter a name for the import file in the **Name** field.
8. Click the **Select** hyperlink next to the **Select File** label and use your browse options to locate your import file.
9. Click **Upload** in the Select Import Attachment pop-up window to import your file.
10. Click **Save** to be taken back to the **Import – Status: Creating screen**.
11. Click **Validate** to begin the validation process. Your file goes into the validation utility queue and the status of your file updates to “Pending Validation”. A banner message indicates the status of your file and updates when the validation process is complete. You may leave this screen open to monitor the

process of your validation or you may click Return to exit and return later. The validation process continues to run in the background.

12. Once your file has validated you may import the file.

How to Export Data:

Complete steps 1-4 from the “How to Navigate to Web Import via Self-Service” section.

13. Click the **Export** button.

14. Select from the Export Type from the drop-down field and you will be redirected to the **Export Screen**.

15. Apply filters to your search, including the required Industry, Labor Category and Assignment Status fields and click **Search**.

16. After your search results come back you can click the **Export** button to be provided and Excel spreadsheet of the results.

Main Benefits:

- Provides transparency for the data validation and import process.
- The audit information for imported data will show the modify/create user as the actual user who clicks on the final **Import Button**.
- Ability to export data with the Export button.

Things to Note:

- Users are unable to add new, validate or import files while impersonating another user.
- Supplier & Assignment Import Types can be *validated* through the Web Import tool but cannot be imported by the tool.
- Imports that are created over 14 days ago will not be accessible.
- Client VMO & MSP Users **will not** be granted access to directly import **Assignments** into Production, and only Clients using a **Supplier Click-Through Access Agreement** will be allowed to import **Suppliers**.