
With our new setup experience, you can now import and export queries in bulk!

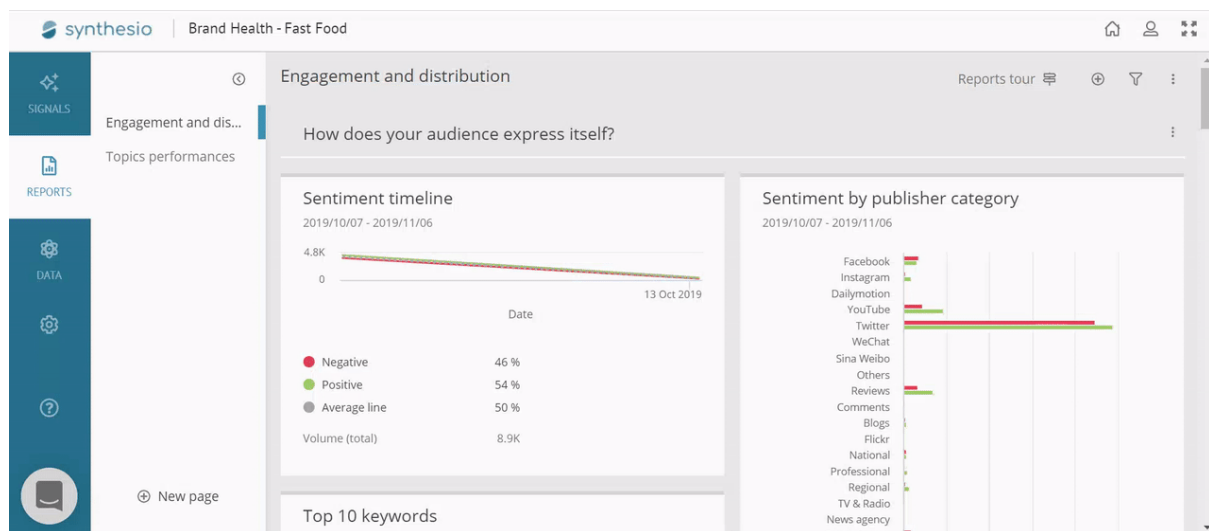
This feature can be very helpful with the following use cases:

1. You want to upload pre-written queries in bulk into a dashboard
2. You want to edit queries already in your dashboard in bulk
3. You want to download a list of your queries for your records, or to share with others

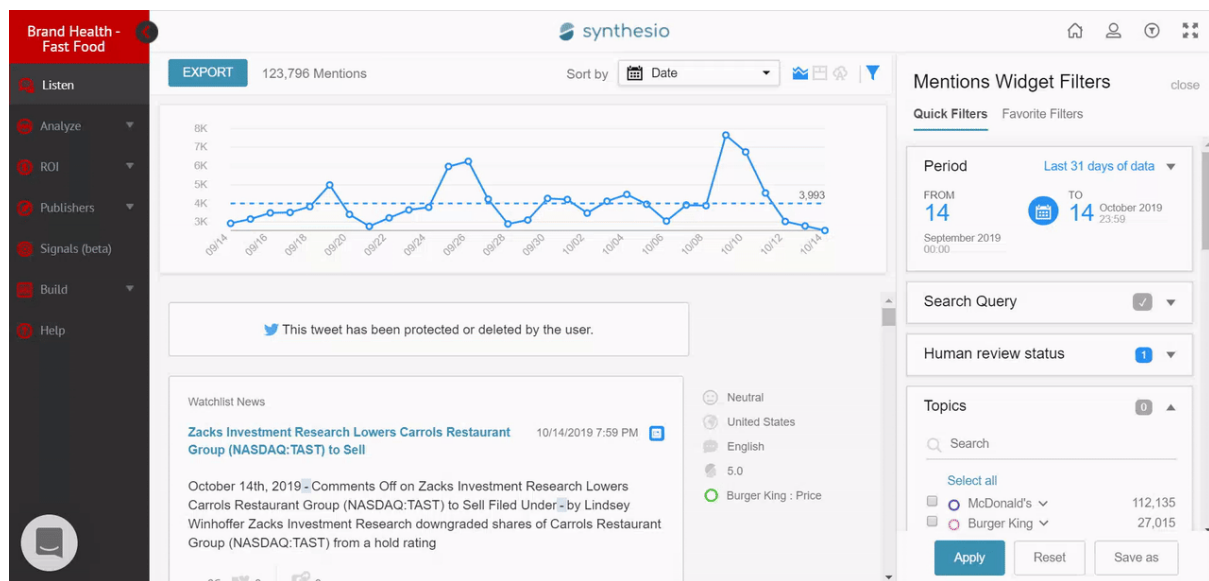
*One important thing to note: *how* you get to the export/import feature is different in the new experience compared to the old experience. We've provided screenshots for both experiences. After that, everything else is the same.

Accessing the Export/Import Feature:

New experience



Old experience

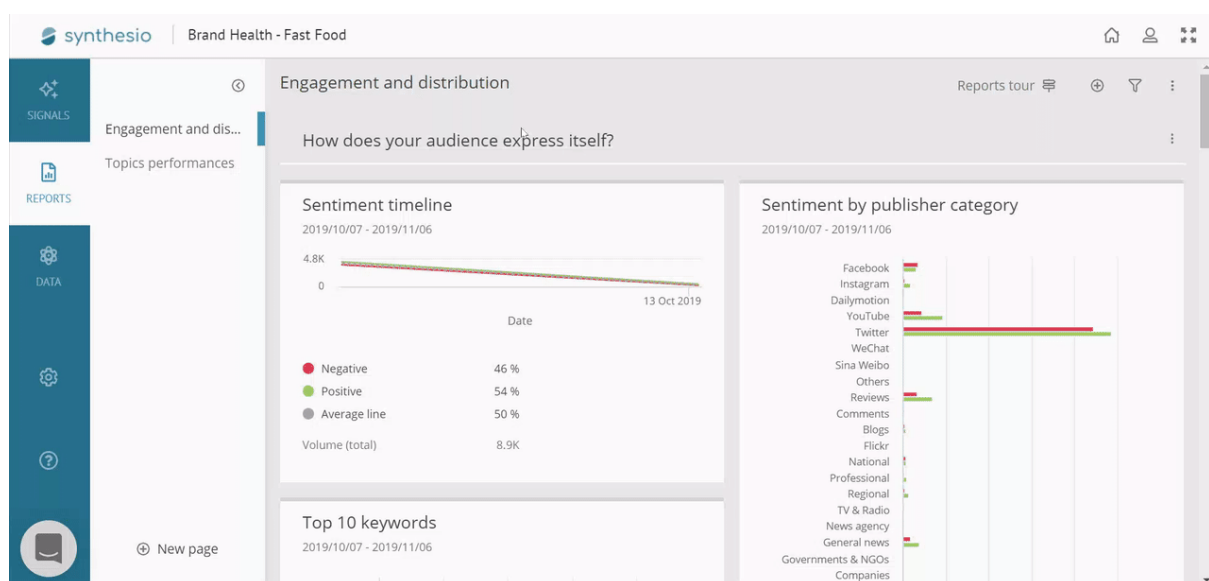


Use-Case #1: Upload

If you already have a list of written queries, it can take a lot of time to input them one-by-one into a dashboard. With the importing queries feature, you can now save time by uploading an Excel file with all of your written queries in a few easy steps:

First, download your queries

A pop-up will appear prompting you to download an Excel template, where you can input your new queries. *At this point, the experience is exactly the same in both the new and old experiences.



Next, add your queries

The template will be pre-populated with your existing topics, subtopics, and queries. You can add new rows with new queries. Make sure you enter the topics and subtopics your new queries belong to in the first two columns!

**Side note, the screenshot of the Excel file below is not the one that we downloaded from the above GIF.*

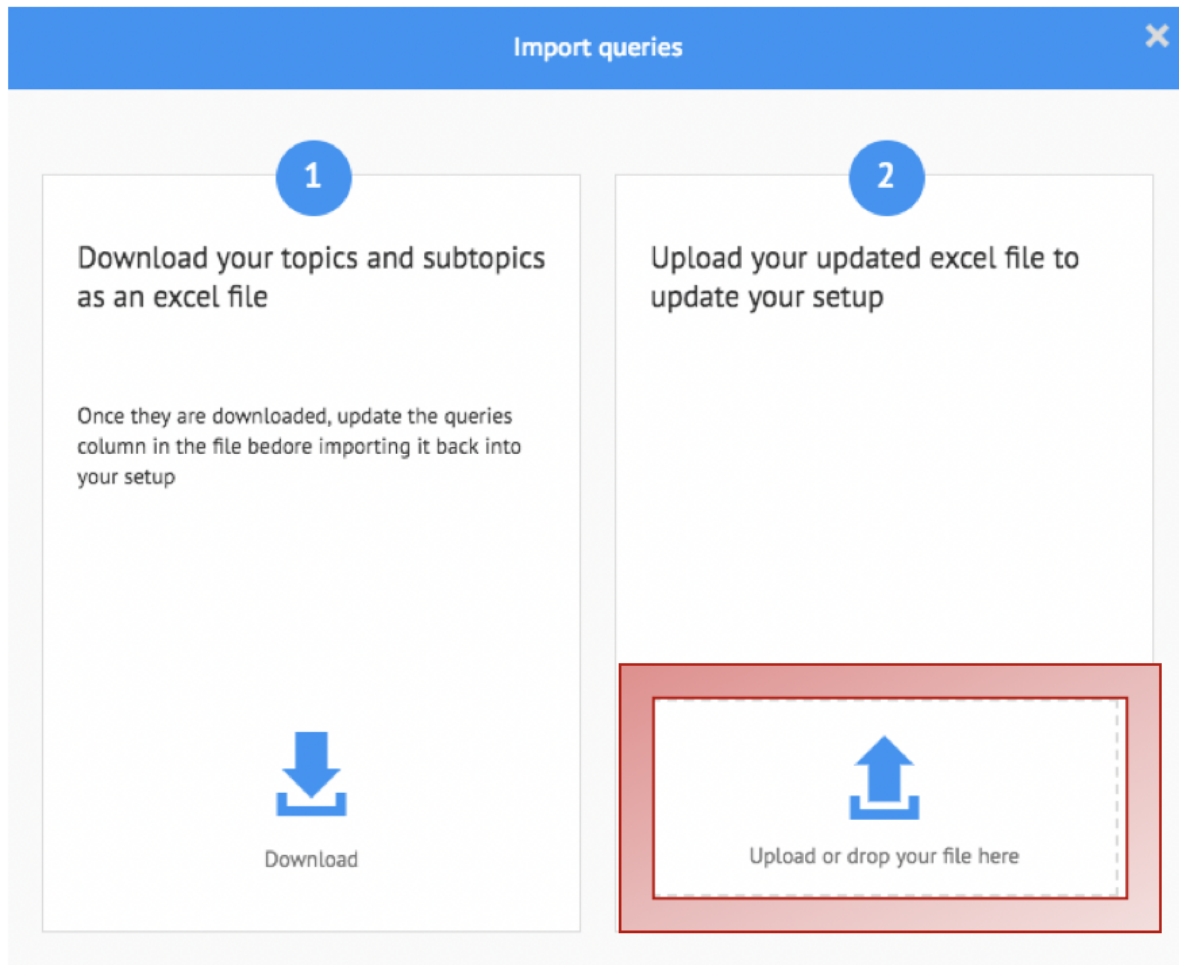
	A	B	C	E
1	Topic	Sub topic	Query name	Query
2				
3	tournaments	french open		(("french open" OR frenchopen))
4	tournaments	US open		(("US open" OR USopen)) NOT (golf OR pga OR tiger)
5	tournaments	Wimbledon		(("Wimbledon "))
6	players	Williams		((Serena OR Williams OR serenawilliams))
7	players	Nadal		((Nadal OR Rafa OR RafaelNadal))
8	players	Federer		(("Federer"))
9	players	Williams		(("US open" OR Usopen) AND williams)
10	players	Nadal		(("US open" OR Usopen) AND nadal)
11	players	Federer		(("US open" OR Usopen) AND federer)

New queries are entered into the "Query" column and assigned to pre-existing topics and sub-topics.

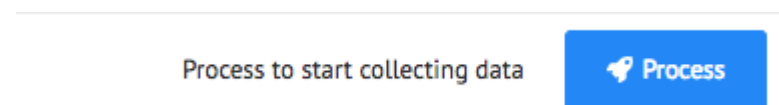
Quick Tip: If you would like to add new topics or subtopics, you have to do this directly in your dashboard. Adding new topics and subtopics via Excel files is not supported.

Last step, upload

Save your new Excel file, and upload the file into your dashboard



After receiving a confirmation message that your file was uploaded, close the Import queries pop-up and click the "Process" button in the bottom-right corner of your screen



Use Case #2: Edit

If you want to apply a change across multiple queries, you can use this feature to avoid wasting time editing each query one-by-one. Instead, apply the change across multiple queries using Excel formulas in a few easy steps (most of which are similar to the first use case).

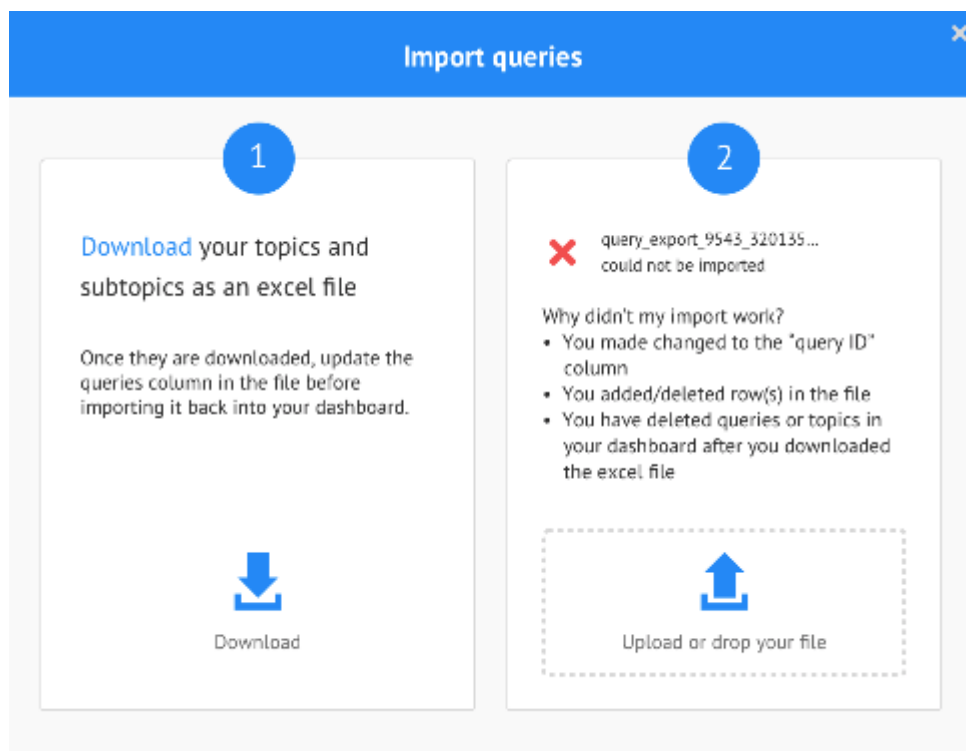
The steps remain almost exactly the same as the steps in Use Case#1. You will need to download the file, make your changes and then upload an edited file.

Use Case #3: Download

For Use Case #3, we are assuming that you would simply like to download your list of queries for reference. To download a list of queries to keep for your records, simply select 'Export queries'.

Possible upload error messages

If you receive this error message after uploading your updated Excel file into your dashboard, there could have been a few things that went wrong:



1. **You made changes to the "query ID" column.** This column will be hidden in the Excel file that you initially export from your dashboard. If you unhide the

column and make changes to it, your upload will be unsuccessful. It is best to leave this column hidden.

2. **You deleted pre-existing rows in your file.** When you download the Excel file from your dashboard it will be pre-populated with the structure from your dashboard. In other words, all of your topics, subtopics, and queries will be present. Deleting these rows will result in an error.
3. **After downloading, you deleted topics, subtopics, or queries in your dashboard.** After completing Step 1 (exporting), and before executing Step 2 (importing), DO NOT delete topics, subtopics or queries within your dashboard. If there is an inconsistency between the two, i.e., the data in your dashboard and your excel file, this will result in an error.
4. **After downloading, you added new subtopics or topics to the Excel file.** After downloading the Excel file, DO NOT introduce new topics or subtopics to the Excel file. The only way to add new Topics or Subtopics is to add them within your dashboard.

In summary, stick to some general rules. When importing, you should only be introducing new queries. Really, do not delete anything. Do not delete old queries. Do not delete pre-existing topics or subtopics. Furthermore, do not add new topics or subtopics. Just add new queries! And, lastly, for these new queries, you must assign them to pre-existing Topics/subtopics. Stick to those rules and you should be fine!