Excel and CSV Sync Options dialog

On this page

The **Excel/CSV Sync Options** dialog allows you to specify settings before syncing data between an Excel/CSV file and a table. You can select files for syncing and define syncing and mapping options in this dialog.
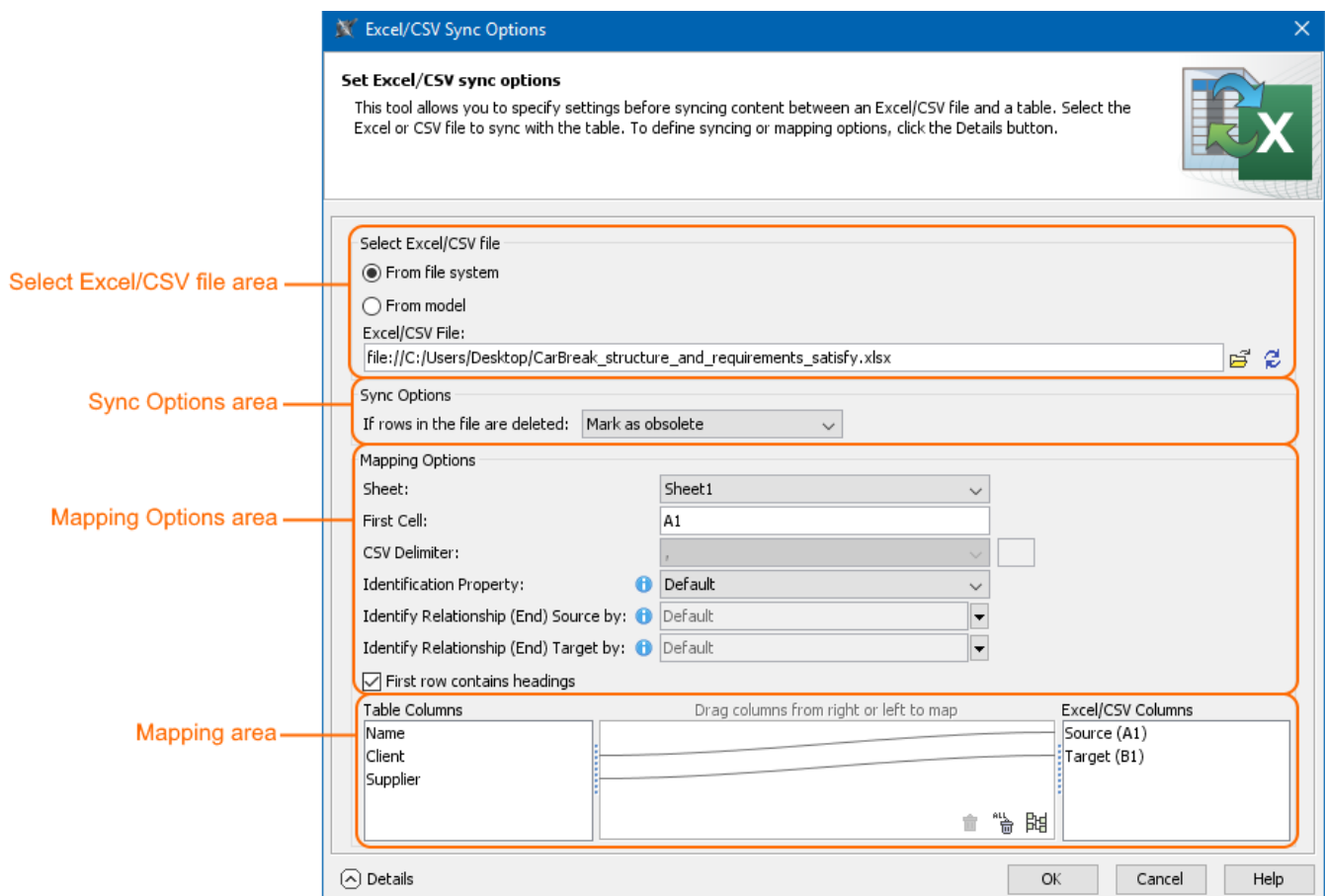
Opening the Excel/CSV Sync Options dialog

To open the **Excel/CSV Sync Options** dialog

- In the table toolbar, click [×] and do one of the following:
    - Select the **Sync Options** command.
    - Select the **Excel/CSV File** > **Select File**. Click the **Details** button on the left bottom corner of the dialog.
    The **Excel/CSV Sync Options** dialog opens.

Description of the Excel/CSV Sync Options dialog areas

The **Excel/CSV Sync Options** dialog consists of the following areas:

- Select Excel/CSV file area
- Sync Options area
- Mapping Options area
- Mapping area

The main areas, highlighted in orange, in the Excel/CSV Sync Options dialog: select file, sync, mapping options, and mapping.

Select Excel/CSV file area

The Select Excel/CSV file area allows you to select the Excel or CSV file from your file system or from your model if the Excel or CSV file is attached to a project. How to attach the file to a project >

> ⓘ You can link only one Excel/CSV file with the same modeling tool table.

The Select Excel/CSV file area contains the buttons described in the following table.

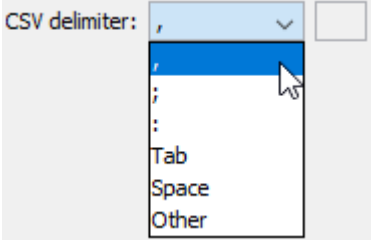| Button	Description
📂	If you select **From file system**, the **Open** dialog opens. The selected file path is displayed in the **Excel/CSV File** field. If you select **From model**, the **Select Excel/CSV file** dialog opens. The selected attached file name is displayed in the **Excel/CSV File** field.
🔄	Refreshes the mapping area after changing the file.

Sync Options area

The Sync Options area contains one option that allows you to specify the sync mechanism behavior when importing data to a table if rows in your file are deleted. All available values are described below.

Sync option	Description
If rows in the file are deleted	**Delete elements from the model** - deletes the same elements that were deleted in the file from your model. > ⓘ If some elements are read-only in Excel file, they cannot be deleted from the model. **Remove elements form the table** - removes the same elements that were deleted in the file **only** from the modeling tool table, **not** from the model. **Mark as obsolete** (default) - The table Legend automatically displays and highlights the removed elements (obsolete) in red.

Mapping Options area

The Mapping Options area allows you to specify mapping options. The following table lists all available options.

Mapping option	Description
Sheet	Select the Excel file sheet you want to sync. The first sheet is selected by default. It is available only for Excel files.
First cell	Select the Excel file cell you want to start syncing from. The first cell filled with data is read by default. If the selected sheet is empty, it reads from the A1 cell. It is available only for Excel files.

CSV delimiter	Select the delimiter of the CSV file from the drop-down list. If you want to specify the custom delimiter in the next box, select **Other**. By default, the comma (,) is selected.
	It is available only for CSV files.
	
	CSV delimiter: `,`
	`,`
	`;`
	`:`
	Tab
	Space
	Other

Identification Property	Select the property that identifies if the element already exists in the model. It allows to avoid element duplication. The **Default** value identify elements by their Name and requirements by their ID first. The rest of the values are the same as columns shown in the table of your model but only of Primitive data types. ⚠ If the imported element **Identification Property** option value matches with an already-existing element property, the identified element properties are updated.
Identify Relationship (end) Source by:	🚫 This option is displayed only if any kind of direct relationship is selected as the **Element Type** option value in the Criteria area. Click ▼ and select the property from the list that identifies the source of the relationship end. Select the **Default** value to identify relationships by their name or id. Select <UNSPECIFIED > value to create the same relationship between the same elements. The mechanism identifies relationships according to the following rules: • If more than one relationship is found with the same Identification Property, the first is updated. • The mechanism identifies relationships according to **Identification Property** option value first unless the Default value is selected and relationship ends are specified with particular tag or property. • If it doesn't find anything or find more than one relationship, then the mechanism proceeds to search according to the **Identify Relationship (end) Source by** option value. • If you import two different relationships (e.g. Satisfy and Dependency) that ends are of different types, this option allows you to select only those properties and tags that are common for both of them.
Identify Relationship (end) Target by:	🚫 This option is displayed only if any kind of direct relationship is selected as the **Element Type** option value in the Criteria area. Click ▼ and select the property from the list that identifies the target of the relationship end. Select the **Default** value to identify relationships by their name or id. Select <UNSPECIFIED > value to create the same relationship between the same elements. The mechanism identifies relationships according to the following rules: • If more than one relationship is found with the same Identification Property, the first is updated. • The mechanism identifies relationships according to **Identification Property** option value first unless the Default value is selected and relationship ends are specified with particular tag or property. • If it doesn't find anything or find more than one relationship, then the mechanism proceeds to search according to the **Identify Relationship (end) Source by** option value. • If you import two different relationships (e.g. Satisfy and Dependency) that ends are of different types, this option allows you to select only those properties and tags that are common for both of them.
First row contains headings check box	Clear the check box if your Excel/CSV file does not contain headings. The check box is selected by default.

Mapping area

The Mapping area allows you to manage mapping between modeling tool table columns and Excel/CSV table columns by creating new mappings, re-mapping, or deleting them:

- To create a new map or re-map one by one, drag columns from the left tree/right tree onto columns in the right tree/ left tree.

- To create a new map or re-map all columns in the ordinal position, click at the bottom of the mapping area.

- To delete mapping one by one, select an appropriate map and click at the bottom of the mapping area.

- To delete all mappings, click at the bottom of the mapping area.

If you do not define your own mapping - that is, the mapping area is empty - the columns by default are mapped on the ordinal position.

The hashtag (#) column from the modeling tool table is not included in the mapping.

Related pages

- Sync with Excel or CSV files
- Table toolbars
- Legends
- Excel and CSV Import dialog