

Tutorial 01. Introduction

Excel Updater is similar to Workfront “Kickstarts”. If you have experience with those, then Excel Updater will feel very familiar.

Excel Updater is a tool used to push changes from Excel spreadsheets into Workfront. Sometimes this is to update existing Workfront items, and sometimes it is to create new Workfront items. Spreadsheets are a convenient way to collect information without having to be connected to Workfront.

AtAppStore Excel Updater versus Workfront Kickstarts

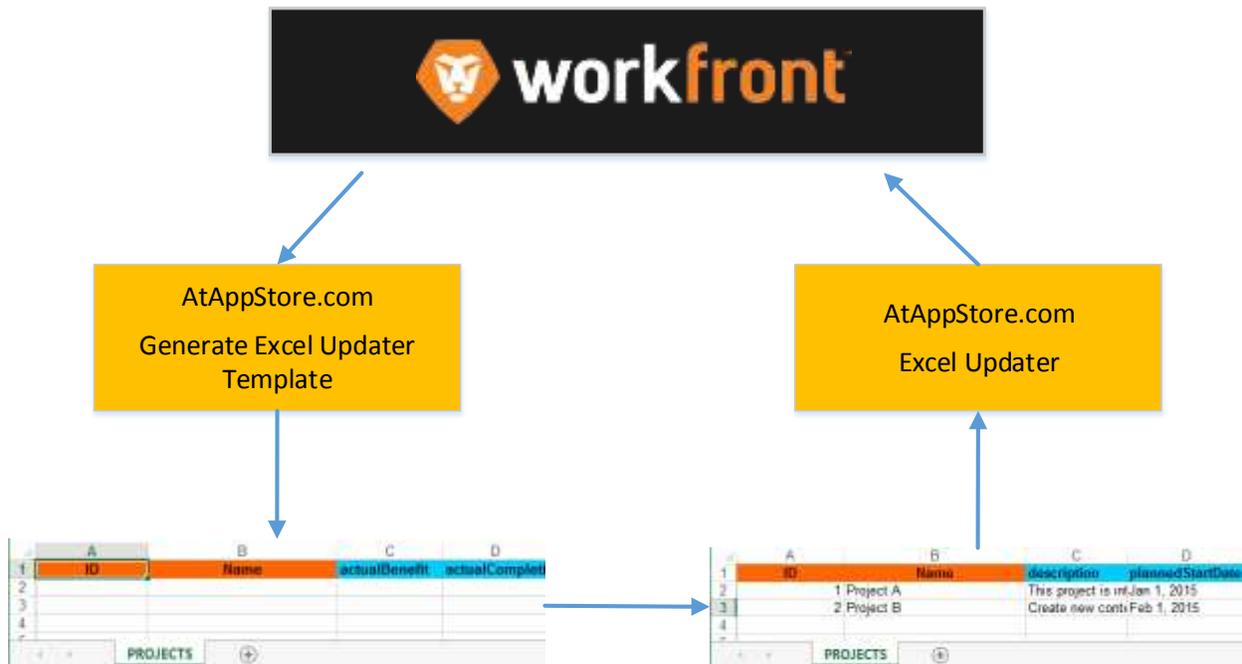
Workfront Kickstarts are a great tool for inserting data into Workfront. But the main limitation of Kickstarts is that they can only be used for inserting data; if you want to update existing records, you should use Excel Updater. If you want to update existing Workfront records and (potentially) insert new records all at the same time, you should use Excel Updater.

Operation	Wrokfront Kickstarts	AtAppStore Excel Updater
Insert new data into Workfront		
Update existing Workfront Data		
Single field keys		
Composite field keys		
Overwrite field values		
Prepend to text field values		
Append to text field values		
Save certain values only when inserting		
Save certain values only when updating		

How Excel Updater came to be...

We originally developed the Excel Updater to solve a real need of a Workfront customer. The Workfront customer was a multi-billion dollar organization with offices across the country. Workfront was being used to coordinate hundreds of simultaneous projects. Business analysts would export the most recent project information from Workfront into a spreadsheet, then fly to a corporate office to meet with executive-level staff where they would spend two days making hundreds of changes to the spreadsheet data. Upon returning home, the analysts needed to get their changes back into Workfront. Thus the Excel Updater was born. We talk more about this particular Workfront customer in our blog post "[Spiral Adoption](#)".

A Typical Workflow of Excel Updater



- Generate an Excel Template
- Remove any columns you do not need
- Fill in data
- Push data into Workfront

Quick steps:

1. Generate a blank Excel file that is in the correct format. This is most easily accomplished if you use the AtAppStore app to generate the file. See Tutorial 02.
2. Configure the columns in the Excel file so primary or composite keys are identified. See Tutorial 03.
3. Fill in the rows of data within the Excel file.
4. Use the AtAppStore “Excel Updater” app to push the Excel file data into Workfront.