Tutorial 01. Introduction

Easy Dataload is similar to Workfront "Kickstarts". If you have experience with those, then Easy Dataload will feel very familiar.

Easy Dataload 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.
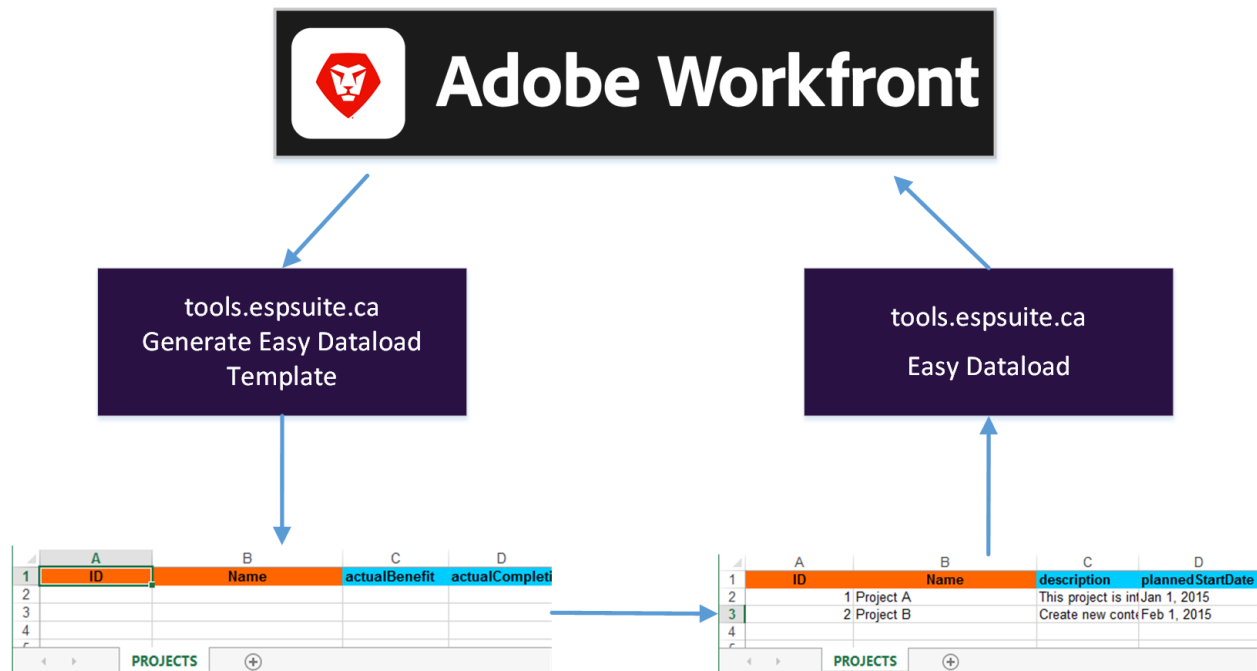
ESP Easy Dataload versus Workfront Kickstarts

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 Easy Dataload. If you want to update existing Workfront records and (potentially) insert new records all at the same time, you should use Easy Dataload.

Operation	Adobe Workfront Kickstarts	ESP Easy Dataload
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 Easy Dataload came to be...

We originally developed the Easy Dataload 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 Easy Dataload was born. We talk more about this particular Workfront customer in our blog post "Spiral Adoption".

A Typical Workflow of Easy Dataload

- 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 ESP 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 ESP "Easy Dataload" app to push the Excel file data into Workfront.