

# Importing Data Into the CIK Library

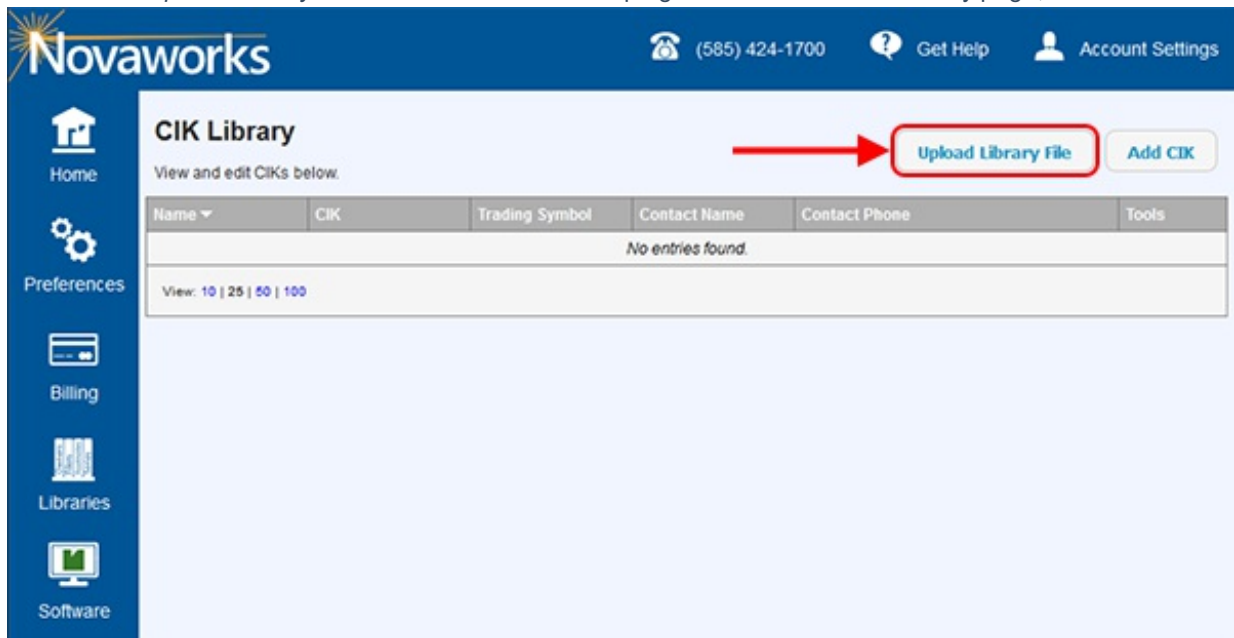
Last Modified on 09/13/2016 5:15 pm EDT

Multiple CIK or filer entries can be added to the library from a Comma-Separated Values (or CSV) file. CSV files are a common method of importing and exporting data from databases or spreadsheets. If you currently store CIK information in a spreadsheet like an Excel sheet, you can save the sheet as a CSV inside of Excel and use that new CSV file as your import file. If you store CIK information in an internal database, you may need to check with your software provider to see if you can export the data as CSV.

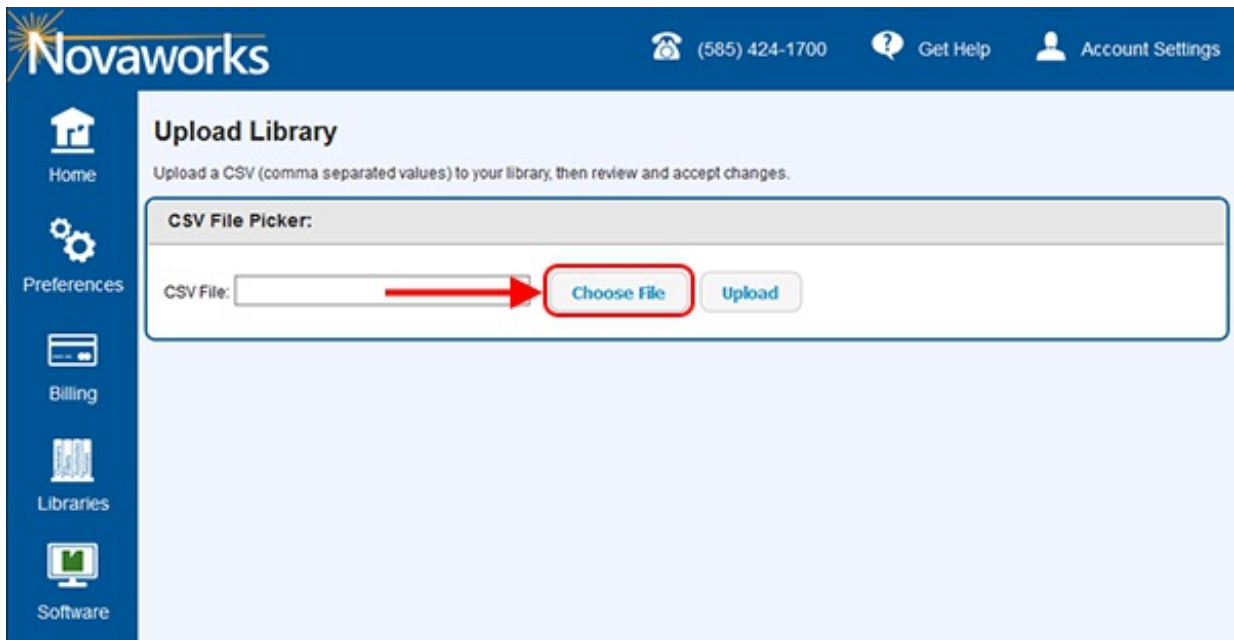
Before importing your data, you will need to make sure the file has a header row. The header row must contain certain keywords for each column to help the import process correctly identify data. You can use the names of each field in the CIK Library as the headers for their respective columns. You can view a complete list of header keywords in the article [Importing Using the CIK Library Keywords](#) and [download a sample file here](#).

## To Import CIK Information from CSV:

1. Click on the *Upload Library File* button located in the top right corner of the CIK Library page, as shown below:

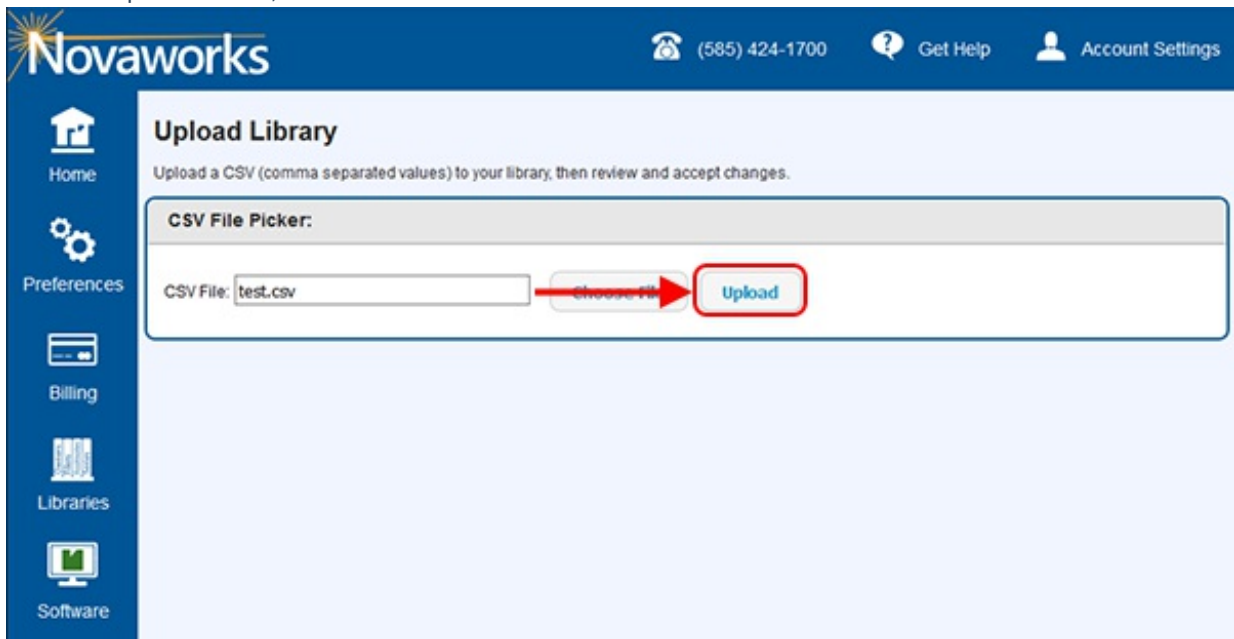


2. The *Upload Library* page appears. Click the *Choose File* button located in the **CSV File Picker** area, as shown below:



3. Navigate to and choose the CSV file to be imported. Press the *Open* button.

4. Click the Upload button, as shown below:



5. Depending on the size of the file being imported and the speed of your internet connection, this process may take up to five minutes. During this time, you will see a notice informing you that the operation is underway. After the process is complete, a notice will appear that says the upload is finished. Press the OK button.

6. You will see the Upload Library page reload with new information. The Upload Log will display the CIK and name of each entry that was uploaded and the result for that entry. The list of entries will show each entry in the library. Entries that are new will show "new" in the Edit Status column. Entries that have been changed due to the upload will show "modified" in the Edit Status column. Entries that were not changed by the upload will show "original" in the Edit Status column. Review the new library.

7. Click the Accept Changes button at the bottom of the page, as shown below:

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Name	CIK	Trading Symbol	Contact Name	Contact Phone	Edit Status
XYZ Corp.	0000012345	XYZ	John Q. Public		original
Average Company	0123456789	AVG	James West	222 222-2222	new
Soap Corp.	0000998923		Dave Washburn		new
Progressive Relapse	0000054203				new
Very Small Co	0000998782		Alfred E Nueman	555-555-1212	new
Large Company	0000000009	AVG	Bob Jenkins	222 222-2222	new
Mane Street Trust	0000990681				new
Excellent Company	0000990645	EXC	Emma Filer	(516) 222-4444	modified
Example Inc.	0088888888		Steve Stevens	(555) 555-5555	modified
Novaworks	0000990681		Scott A. Theis	585-424-1700	modified
Movie Watchers Inc	0000999923		Al Dente		modified
Excellent Fund	0000990644	EXC	Emma Filer	(516) 222-4444	modified
Excellent Trust	0000990001	EXCT	Emma Filer	(516) 222-4444	modified

View: 10 | 25 | 50 | 100

**Accept Changes** Cancel Upload

8. A notice will appear, informing you that the library has been updated with the new entries. Click the OK button to return to the library.

#### Helpful Hints:

- A maximum of 1,000 entries may be imported from a single file. If you have more than 1,000 entries to import, break your list into multiple files and import each section individually.