

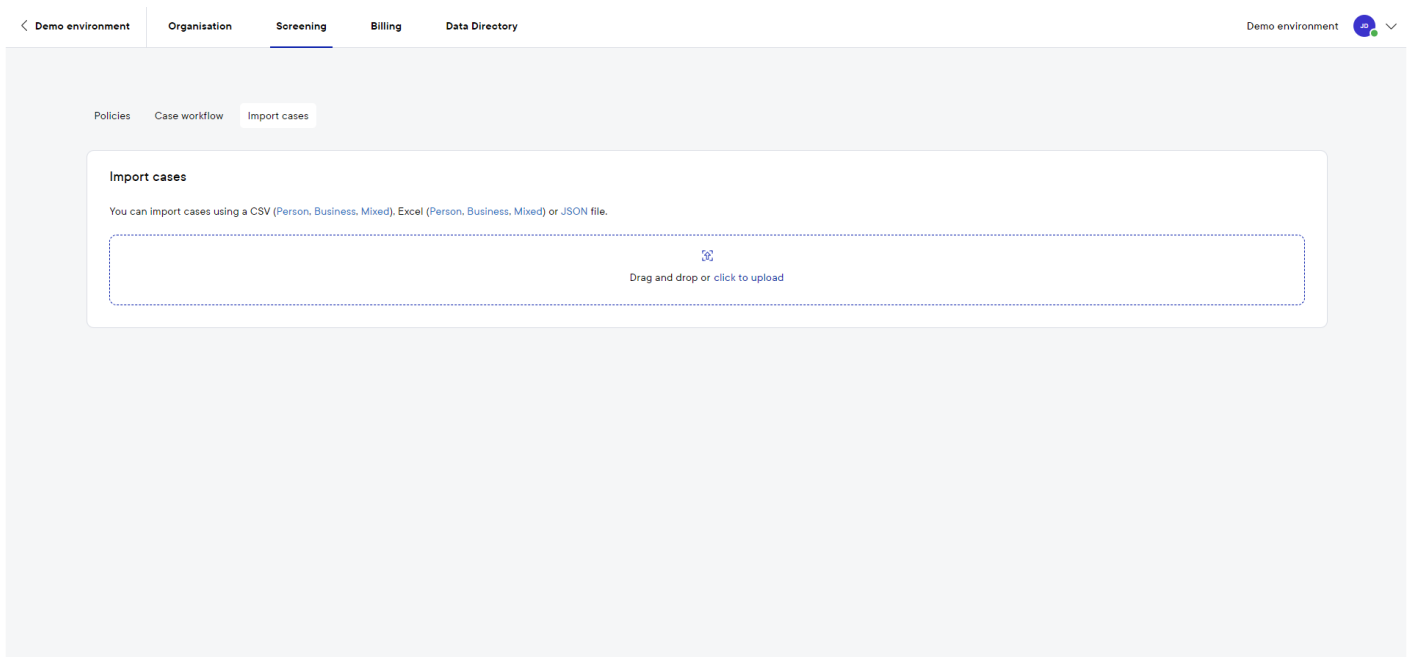
# How to import cases in Pascal

This documentation, including images, videos and text, is accurate as of Version 5.12 of Pascal.

We strive to keep our documentation up to date with each release to ensure it remains a reliable resource for our users. However, given the dynamic nature of our software development, there might be instances where changes introduced in subsequent versions are not immediately reflected in this documentation. We encourage users to refer to [the latest release notes](#) and to use the feedback mechanism for any discrepancies or requests for clarification.

To import multiple cases into Pascal at once, you can upload a CSV, Excel or JSON file with the cases. Which makes converting existing cases into Pascal much easier.

*Only users with owner or admin rights can perform the action to import cases.*



The screenshot shows the Pascal web application interface. At the top, there is a navigation bar with tabs: 'Demo environment', 'Organisation', 'Screening' (which is active), 'Billing', and 'Data Directory'. On the right side of the navigation bar, it says 'Demo environment' next to a user profile icon. Below the navigation bar, there is a sub-navigation bar with tabs: 'Policies', 'Case workflow', and 'Import cases' (which is active). The main content area is titled 'Import cases' and contains the text: 'You can import cases using a CSV (Person, Business, Mixed), Excel (Person, Business, Mixed) or JSON file.' Below this text is a large dashed rectangular box for file upload. Inside the box, there is a small icon of a document with a plus sign and the text 'Drag and drop or click to upload'.

- 1 Click on your initials in the top right corner.
- 2 Select Settings next to the environment name.
- 3 Click on the Screening tab and open the Import cases page.
- 4 On the Import cases page, you can get a template file for case importing. If you have an existing file, you can upload it into the designated area by dragging the file in that area or selecting the file in your file explorer after clicking on click to upload.
- 5 The cases from the file are presented in the interactive table. The cases are assessed by automatic validation. If there are rows with invalid values, you can select those rows using the Filter rows selector above the table. You can review the cases and make final adjustments before uploading them into the account.
  - Values can be changed directly in the table and replaced at once for multiple rows.
  - There are dropdowns for multiple columns, where you can select a value directly from the list.
  - The date format can be adjusted if needed.

Import cases ×

Name	File size	Result	Validation	Date format
Import file example.csv	1 KB	12 rows	Valid	YYYY-MM-DD (detected) ▾

Remove file Download file

Filter rows ☒ All ☐ Invalid ☐ Valid

Person Business Unknown

Confidence	Name	Nationality	Country of birth	Country of residence	Date of birth	Gender	Assignee	Aliases	Additional terms	Clients	Description
Relative	John Doe	<span>Australia</span>	<span>Australia</span>	<span>Australia</span>	1995-01-19	Male	Unassigned			<span>Client A</span> <span>Client C</span>	
Relative	Jane Doe	<span>Australia</span>	Not available	Not available	1993-05-20	Female	Unassigned			<span>Client B</span>	
Relative	Harry Doe	<span>Netherlands</span>	<span>Netherlands</span>	<span>Netherlands</span>	1975-07-31	Male	Unassigned			<span>Client A</span>	
Relative	John McDoe	<span>Netherlands</span> <span>Turkey</span>	<span>Turkey</span>	<span>Netherlands</span>	1988-11-16	Male	Unassigned			<span>Client C</span> <span>Client B</span>	
Relative	Jonathan Doe	<span>Ireland</span>	<span>Ireland</span>	Not available	1965-10-16	Male	Unassigned			<span>Client D</span>	
Relative	James Doe		Not available	Not available	1945-09-22	Male	Unassigned			<span>Client A</span> <span>Client B</span> <span>Client C</span>	

Cancel Import

- 6 If all displayed information is correct, you can click on the Import button.

*When large files are being imported, it can take some time before the system is done with the import.*

Revision #4

Created 26 January 2024 13:37:12 by Sanne Janssen

Updated 24 October 2024 07:05:54 by Sanne Janssen