



## Managing Custom Reference Data

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- [Custom Reference Data Overview](#), on page 1
- [Import And Export CRD Data](#), on page 1
- [View Custom Reference Data Tables](#), on page 2
- [Import Custom Reference Data Table](#), on page 4

### Custom Reference Data Overview

Custom reference data is data specific to a service provider and provides a way to create their own data tables and to populate them. It adds variations of existing use cases configured in Policy Builder.



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**Note** All policy server (qns) must be restarted after a CRD table schema is modified (for example, column added/removed).

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### Import And Export CRD Data

The Import/Export CRD data option enables you to perform the following operations:

- Enables users to export the CRD data packaged in .crd file
- Enables users to import the CRD tables in a CSV format

A valid imported file should follow CRD schema and should have all required files.

### Export Custom Reference Data

Perform the following steps to export CRD data:

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- Step 1** Log in to the CPS Central.
  - Step 2** Click **Custom Reference Data**.
  - Step 3** Select **Export**.

The contents of the CRD table is generated in a csv format in a zip file.

**Step 4** Click **Save File**.

**Step 5** Click **OK**.

## Import Custom Reference Data

Perform the following steps to import CRD tables:

**Step 1** Log in to the **CPS Central**.

**Step 2** Click **Custom Reference Data**.

**Step 3** Select **File to Import...**

The **File Upload** dialog box is displayed from where you can select a file to be imported.

**Step 4** Click **Import**.

**Note** A warning message is displayed in the success modal for bulk import of CRD tables when the archive file to import has CRD tables with Svn Crd Data flag enabled.

## View Custom Reference Data Tables

Custom Reference Data Tables section lists the custom reference data (CRD) tables in an alphabetic order along with its description.

You can select a CRD table from the displayed list and view its data. The search filter is added to support full and partial string match.

A key icon is displayed before the column name of the selected CRD tables. This provides the following information:

- Indicates whether the column in the selected CRD table is a key column or non-key column.
- Indicates the type of Runtime Binding and its value in a tooltip when you hover over it.

The following operations can be performed:

- Add a record to the table
- Edit record of the table
- Delete a record of the table

The results are paginated for easy access and scrollbars can be used when there are more number of columns.



**Note** The edit, delete and add options are disabled for CRD tables with Svn Crd Data flag enabled.

## View Multiple CRD Tables

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**Step 1** Navigate to **Custom Reference Data**.

**Step 2** In the left-hand pane, select CRD tables listed under **Display Name**.

The tables are displayed on the right-hand side. You can drag and resize the tables horizontally.

**Step 3** Click **Close**.

**Note**

- By default the **Custom Reference Data Tables** tab is expanded. Only one of the panels can be expanded at a time. For example, when the **Import/Export CRD data** tab is expanded, the **Custom Reference Data Tables** tab is closed and vice versa.

- You can use the scroll bar to view records in a large CRD table.
  - You can use the **Add Row** option to enter records.
  - You can use the **Close** option to close a CRD table.
  - You can click **Close All** option to close multiple tables.
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## Edit Multiple CRD Tables

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**Step 1** Navigate to **Custom Reference Data**.

**Step 2** In the left-hand pane, select CRD tables listed under **Display Name**.

The tables are displayed on the right-hand side.

1. To modify record values, click edit icon. A CRD record modal popup is displayed.
2. To enter record values, click **Add Row**.
3. To delete records, click delete icon.

**Step 3** Click **Done**.

**Step 4** Click **Close**.

**Note**

- You can edit only one CRD table at a time.
- The SVN CRD tables have only read only option.
- You can click **Close All** option to close multiple tables.

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# Import Custom Reference Data Table

Perform the following steps to import a custom reference data table:

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**Step 1** In CPS Central, navigate to **Custom Reference Data**.

**Step 2** Select any CRD table.

**Step 3** Click the **Import** option provided against the selected CRD table.

The **File to Import** dialog box is displayed from where you can select a file to be imported.

**Note** The import link is disabled for CRD tables with Svn Crd Data flag enabled.

**Step 4** Select a file.

**Step 5** After the file is loaded, Click **Import**.

- Note**
1. The selected file should be of XLS or CSV format.
  2. The name of the selected file should match that of the CRD table name.
  3. If you try to import data with wrong headers, "Mismatch found between imported csv headers and policy builder table columns" error message is displayed.
  4. If you try to import data having duplicate records, "Duplicate rows found in the imported data for table: (table\_name). Duplicate records count: (duplicate\_count)? error message is displayed.

Data Imported success message is displayed.

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