

# Import Flow

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An exported flow can be imported into Trifacta®.

- **Dev instance:** If you are using an instance of the platform for developing and testing your flows, you can import a new flow through the Flows page.

**NOTE:** Unless your instance of the platform has been specifically configured to support deployment management, you are using a Dev instance of the platform.

**NOTE:** If you are attempting to share a flow with other users on the same instance of the platform, you should use the sharing functions. See *Overview of Sharing*.

- **Prod instance:** If you are importing a flow into a Production instance of the platform, you import it as a package through the Deployment Manager.

**NOTE:** Deployment Manager is a feature that enables segmentation of platform usage between Dev instances and Prod instances. This feature must be enabled and configured. For more information, see *Overview of Deployment Manager*.

## Limitations

**You cannot import flows that were exported before Release 6.8. See *Changes to the Object Model*.**

**NOTE:** You cannot import flows into a version of the product that is earlier than the one from which you exported it. For example, if you develop a flow on free Trifacta Wrangler, which is updated frequently, you may not be able to import it into other editions of the product, which are updated less frequently.

Imported flows do not contain the following objects:

**NOTE:** Depending on the import environment, some objects in the flow definition may be incompatible. For example, the connection type may not be valid, or a datasource may not be reachable. In these cases, the objects may be removed from the flow, or you may have to fix a reference in the object definition. After import, you should review the objects in the flow to verify.

- Reference datasets
- Samples
  
- Connections

**NOTE:** Exported flows do not contain connections. If your flow relies on a connection to the source, you must create the connection in the Prod environment and create an import mapping rule to assign the local connection ID to the import package. Flows that do not require connections may not require remapping before import. See *Define Import Mapping Rules*.

**NOTE:** If the flow's output object uses connections that are not used for importing datasets in the flow, the output is broken on import. Those outputs and their associated connections must be recreated in the environment into which the flow is imported.

Imported datasets that are ingested into backend storage for Trifacta may be broken after the flow has been imported into another instance. These datasets must be reconnected to their source. You cannot use import mapping rules to reconnect these data sources. This issue applies to the following data sources:

- Microsoft Excel workbooks and worksheets. See *Import Excel Data*.
  
- PDF tables. See *Import PDF Data*.

## Define import rules

Before you import a package, you may need to create import mapping rules to apply to your package. For example, if the Development data is stored in a different location than the Production data, you may need to create import rules to remap paths and connections to use to acquire the data from the Production environment.

**NOTE:** Import rules are applied at the time of import. They cannot be retroactively applied to releases that have already been imported.

For more information, see *Define Import Mapping Rules*.

## Import

**NOTE:** You cannot import into a Dev instance if your account for the instance contains the Deployment role.

**NOTE:** When you import a flow, you must import a ZIP file containing the JSON definition.

### Steps:

1. Export the flow from the source system. See *Export Flow*.
2. Login to the import system, if needed.
3. Click **Flows**.

4. From the context menu in the Flow page, select **Import Flow**.
5. Select the ZIP file containing the exported flow. Click **Open**.

If there are issues with the import, click the Download link to review the missing or malformed objects.

**Tip:** When you import the flow, click the Warnings link to review the list of objects that must be remapped.

The flow is imported and available for use in the Flows page. After import:

- You may need to reconnect your imported datasets to data sources that are available in the new workspace or project. See *Reconnect Flow to Source Data*.
- You may also need to reconnect your outputs. See *Reconnect Flow to Outputs*.

## Import into Prod instance

After creating any import rules in your Prod instance, please do the following.

### Steps:

1. Export the flow from the source system. See *Export Flow*.
2. Login to the Prod instance. The Deployment Manager is displayed.
3. Click **Deployments**.
4. Select or create the deployment into which to import the package.
5. Within the deployment, click **Import Package**.
6. Select the ZIP file containing the exported flow. Click **Open**.
  - a. Any defined import rules are applied to the package during import.
  - b. The package is selected as the active one for the deployment.
  - c. If there are issues with the import, click the Download link to review the missing or malformed objects.

**Tip:** After you import, you should open the flow in Flow View and run a job to verify that the import was successful and the rules were applied. See *Flow View Page*.