

# Standard Workflow Simple Autoimport

So far we have:

Exante Instruments

Exante Positions

We assume that there is no exotic currencies (then you need Exante Currencies)

All these data converted to Standard Configuration. So we should be able to Import them!

Before creating an automation, lets try to do it manually

So, for that we will use `/explorer/workflows/com/finmars/standard-workflow/simple-autoimport/tasks.py`

its a relatively simple workflow that could import either data or transactions. Its payload structure is:

So you add any number of steps (Depends of your situation). Order is matter! Here for example we import Instruments and then only Positions

`directory` - optional: path to directory in explorer with files to import, trailing slash is important (/ on end)

`file_path` - optional: path to some file in explorer with data to import

`import_type` - required: "data" for Simple Import, "transaction" for Transaction Import

`schema` - required: user\_code of schema to execute

Nota bene: Both `directory` and `file_path` are optional, but one must be present

If you pass `directory` it will tries to join all files in that directory into one file (List of Dictionaries)

So, lets try it out!

Go to Workflows Page and lets find `com.finmars.standard-workflow:simple-autoimport`

```
{
  "actions": [
    {
      "directory": "/data/general/instruments/",
      "import_type": "data",
      "schema": "com.finmars.standard-import-from-file:instruments.instrument:instruments"
    },
    {
      "file": "/data/general/positions/exante_abcd123_001_2024-09-01_2024-09-24.json",
      "import_type": "transaction",
      "schema": "com.finmars.standard-import-from-file:pos_daily"
    }
  ]
}
```



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Finmars Workflow

com.finmars.standard-workflow.get-files-inputs			worker	▶
com.finmars.standard-workflow.get-files-states			Worker	▶
com.finmars.standard-workflow.import-currency-from-unified-db			Worker	▶
com.finmars.standard-workflow.import-from-file			Worker	▶
com.finmars.standard-workflow.import-fx-rate-from-unified-db			Worker	▶
com.finmars.standard-workflow.import-instrument-from-unified-db			Worker	▶
com.finmars.standard-workflow.import-prices-from-unified-db			Worker	▶
com.finmars.standard-workflow.init			Worker	▶
com.finmars.standard-workflow.initial-data			Worker	▶
com.finmars.standard-workflow.preprocess-exante-fx-rates			Worker	▶
com.finmars.standard-workflow.preprocess-exante-instruments			Worker	▶
com.finmars.standard-workflow.preprocess-exante-positions			Worker	▶
com.finmars.standard-workflow.preprocess-exante-prices			Worker	▶
com.finmars.standard-workflow.preprocess-exante-transactions			Worker	▶
com.finmars.standard-workflow.preprocess-finmars-db-fx-rates			Worker	▶
com.finmars.standard-workflow.roll-price			Worker	▶
com.finmars.standard-workflow.simple-autoimport			Worker	▶
com.finmars.standard-workflow.sync-files			Worker	▶
com.finmars.standard-workflow.workflow-manager		* / 1 * * * *	Manager	▶

Lets execute it!



Okay, so far we Imported only Instruments, let see (Go to Data / Instruments)

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Stock (11)				US46429B6974	2024-09-2		United States of An	USD	USD	USMV.BATS	iShares MSCI USA Min Vol Factor E
- (1)				US72201R8170	2024-09-2		United States of An	USD	USD	CORP.ARCA	PIMCO Investment Grade Corporate
				US78463V1070	2024-09-2		United States of An	USD	USD	GLD.ARCA	SPDR Gold Shares
				US78463X509E	2024-09-2		United States of An	USD	USD	SPEM.ARCA	SPDR Portfolio Emerging Markets E
				US8085248701	2024-09-2		United States of An	USD	USD	SCHP.ARCA	Schwab US TIPS ETF
				US81369Y886E	2024-09-2		United States of An	USD	USD	XLU.ARCA	Utilities Select Sector SPDR Fund
				US92189F4375	2024-09-2		United States of An	USD	USD	ANGL.NASDAQ	VanEck Fallen Angel High Yield Bon
				US9219378356	2024-09-2		United States of An	USD	USD	BND.NASDAQ	Vanguard Total Bond Market ETF
				US92206C870E	2024-09-2		United States of An	USD	USD	VCIT.NASDAQ	Vanguard Intermediate-Term Corpo
				US922908553E	2024-09-2		United States of An	USD	USD	United States of America VANGARCA	Vanguard Real Estate ETF

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Great success! We imported all the instruments from files that we previously downloaded from Exante