

# School Information System

## Constituent Data Migration

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## Overview

Constituent data is central to the entire School Information System – anyone who is managing the system, logging into the system, or being tracked in the system needs to be entered as a user. Users can be added individually or imported in bulk. This guide will cover how to import constituents using the Data Import task.

### Importing Data Files

Your Blackbaud data analyst will assist you with imports for the following constituents

- Employees
- Parents
- Students
- Alumni
- Parents of Alumni
- Friends
- Grandparents
- Trustees

Initially, please email your files to your Data Analyst so that they can review and process the files for you. After the initial data conversion is complete, a Data Manager can import additional files to add new records or update existing records by going to Core > System Tools > Data Import. You will not see this task until the Data Analyst has processed your files.

You will be able to import as many types of data as you want on your own without Blackbaud's assistance once the initial files have been processed.

### Reminders

Please note that data import cannot be used to remove records in bulk. It may be billable if you need Blackbaud to remove inaccurate data in bulk. Validate your data *before* processing to ensure any issues are resolved prior to the data being imported.

Data import files are processed within a few minutes if there are less than 5,000 records. Files with over 5,000 records will be processed overnight.

## Relationships

Users will have relationships with other constituents established through the Relationship Building import. Relationships with and between students will assign certain roles. These roles include:

- Parents
- Grandparents
- Spouses
- Siblings

## Roles

Users will be assigned constituent roles through the Role Assignment data import. These roles include:

- Employees
- Students
- Alumni
- Friends
- Trustees

All constituents will also be assigned the All School role when added through the general user import.

## What Records Can be Uploaded?

All constituents can be uploaded using the General User import.

The following role types are **excluded** from the User Role import:

- Past Students
- Parents of Past Students
- Past Employees
- Candidates
- Parents of Candidates
- Past Candidates
- Parents of Past Candidates
- Managerial Roles

Biographical information can still be updated for the constituents using the General User Import.



## General User

The purpose of the General User import is to create constituents in the database and populate their biographical information. User records must be created before roles can be assigned.

The General User import can also be used to update constituent information for existing users.

### Fields

Column name	Required	Data type	Max length	Description
host_id <b>OR</b> user_ID (once a user is created)	true	varchar	25	User's unique HostID as assigned by the school. Host ID must be supplied during the initial import, however in subsequent imports existing users can be identified using the UserID.
firstname	true	varchar	50	First name
lastname	true	varchar	50	Last name
prefix	false	varchar	25	Prefix
middlename	false	varchar	50	Middle name
nickname	false	varchar	50	Nickname
suffix	false	varchar	25	Suffix
maidenname	false	varchar	50	Maiden name
email	false	varchar	100	Email
cc_email	false	varchar	100	cc Email
user_name	false	varchar	100	User name
disable_login	false	char	1	Disable user login? (Yes=disable login, No=enable login or leave blank to do nothing)
dob	false	datetime	10	Date of birth (MM/DD/YYYY)
grad_year	false	char	4	Grad year (YYYY)
ssn	false	varchar	11	Social Security Number
address_1	false	varchar	50	Home address line 1
address_2	false	varchar	50	Home address line 2
address_3	false	varchar	50	Home address line 3
city	false	varchar	50	Home city
state	false	varchar	50	Home state abbreviation code or long name (use with USA states only)
province	false	varchar	50	Home province name (Canada, Australia, New Zealand, United Kingdom)
zip	false	varchar	11	Home zip
country	false	varchar	50	Home country (no abbreviations)
region	false	varchar	25	Home region
formal_salutation	false	varchar	100	Formal mailing label salutation
informal_salutation	false	varchar	100	Informal mailing label salutation
household_salutation	false	varchar	100	Household mailing label salutation

phone	false	varchar	30	Home phone
greeting	false	varchar	50	Greeting (used for email)
mailing_address	false	char	1	Mailing address (Y)es, (N)o or leave blank
preferred_address	false	char		Preferred address (Y)es, (N)o or leave blank
wireless_phone	false	varchar	30	Wireless phone
living_status	false	varchar	10	Living Status (Single, Married, Remarried, Separated, Divorced, Widowed, Partner)
ethnicity	false	varchar	50	Ethnicity
religion	false	varchar	50	Religion
citizenship	false	varchar	50	Citizenship
gender	false	char	1	Gender (M)ale, (F)emale, (O)ther
deceased_ind	false	char	1	Deceased (Y)es, (N)o or leave blank
deceased_date	false	datetime	10	Deceased Date (MM/DD/YYYY)
business_name	false	varchar	75	Business name
job_title	false	varchar	100	Job title
profession	false	varchar	100	Profession/Occupation
industry	false	varchar	100	Industry
employment_start	false	datetime	10	Employment start date (MM/DD/YYYY)
employment_end	false	datetime	10	Employment end date (MM/DD/YYYY)
business_url	false	varchar	100	Business URL
student_id	false	varchar	25	Student ID
lost_ind	false	char		Lost (Y)es, (N)o or leave blank. Lost indicates the school does not have their current contact information
personal_url	false	varchar	100	Personal URL
boarding_day	false	varchar	10	(B)oarding or (D)ay or leave blank
religious_affiliation	false	varchar	50	Religious affiliation

### Example

host_id	first_name	last_name	email	username	address_1	city	state	zip	country	wireless_phone	gender
123456	John	Smith	John.Smith@blackbaud.com	John.Smith@blackbaud.com	100 Oak Street	Charleston	SC	29492	United States	(123) 123-1234	Male
456789	Sarah	Jones	Sarah.Jones@blackbaud.com	Sarah.Jones@blackbaud.com	400 Palm Ave	Charleston	SC	29492	United States	(456) 456-4567	Female

## Troubleshooting

Error Message	Things to Check
No Match: UserHostID(firstname, lastname,class_of,host_id)	Make sure Host ID matches the Host ID for the user Make sure first name/last name matches the user's first name/last name
No Match:UserMain(firstname,lastname,user_id);	Make sure User ID matches the User ID for the user Make sure first name/last name matches the user's first name/last name
Invalid Data: email format not valid	Email must be properly formatted. Must contain a local part, followed by an @ symbol and end with a domain.
No Match-Gender(gender);	Make sure that the gender entered is one of the following values: M, Male, F, Female, O, Other
No Match-Citizenship(citizenship);	Make sure that the citizenship entered matches one of the values in Core > Settings > General settings > Table values > Citizenship
No Match-EthnicityType(ethnicity);	Make sure that the ethnicity entered matches one of the values in Core > Users > User profile settings > Ethnicity types
No Match-Religion(religion);	Make sure that the religion entered matches one of the values in Core > Users > User profile settings > Religion types
No Match-BoardingDay(boarding_day);	Make sure that the BoardingDay entered is one of the following values: B, Boarding, D, Day
No Match-StateLookup(state);	Make sure the state entered is a valid state for the United States country supported by the product. Run Advanced Lists. NOTE: Both long and short state names are allowed.
Invalid data: must use either state or province.Invalid data: business address must use either state or province.	Make sure that b_state and b_province are not both populated.
Invalid data: must use either state or province.Invalid data: home address must use either state or province.	Make sure that state and province are not both populated.
No Match-Country(country);	Make sure the country entered is a valid country supported by the product. Run Advanced Lists.
No Match-LivingStatus(living_status);	Make sure that the living status entered is one of the following values: Single, Married, Remarried, Separated, Divorced, Widowed, Partner

## Relationship Building

The purpose of the Relationship Building import is to form relationships between constituents once they have been added to the database.

There are two types of relationship imports: Peer and Hierarchical. Each of these imports have unique file requirements which are defined below. Users are matched on Host ID OR User ID, First Name, and Last Name, so each import has two layouts.



## Peer Relationship Types

rel_type	peer1	peer2
<b>Peer</b>	<b>Spouse/Partner</b>	<b>Spouse/Partner</b>
Peer	Step-Sibling	Step-Sibling
Peer	Ex-Husband	Ex-Wife
Peer	Associate	Associate
Peer	Half-Sibling	Half-Sibling
Peer	Husband	Wife
<b>Peer</b>	<b>Spouse</b>	<b>Spouse</b>
<b>Peer</b>	<b>Sibling</b>	<b>Sibling</b>
Peer	Cousin	Cousin
Peer	Friend	Friend

## Peer Fields

Column name	Required	Data type	Max length	Description
peer1_rel_type	true	varchar	50	Peer1 type of relationship (non parental)
peer1_hostid <b>OR</b> peer1_userid	true	varchar	25	Peer1 unique HostID as assigned by the school.
peer1_firstname	true	varchar	50	Peer1 Firstname
peer1_lastname		varchar	50	Peer1 Last name
peer2_rel_type	true	varchar	50	Peer2 type of relationship (non parental)
peer2_host_id <b>OR</b> peer2_userid	true	varchar	25	Peer2 unique HostID as assigned by the school.
peer2_firstname	true	varchar	50	Peer2 First name
peer2_lastname	true	varchar	50	Peer2 Last name

## Hierarchical Relationship Types

rel_type	adult	child
<b>Hierarchical</b>	<b>Step-Parent</b>	<b>Step-Child</b>
Hierarchical	Great Grandparent	Great Grandchild
Hierarchical	Guardian	Ward
Hierarchical	Aunt/Uncle	Niece/Nephew
<b>Hierarchical</b>	<b>Grandparent</b>	<b>Grandchild</b>
<b>Hierarchical</b>	<b>Parent</b>	<b>Child</b>
Hierarchical	Consultant/Custodian	Custodial Student
Hierarchical	Consultant	Consultant Student

Hierarchical	Caretaker	Charge
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## Hierarchical Fields

Column name	Required	Data type	Max length	Description
adult_rel_type	true	varchar	50	Adult type of relationship
adult_host_id OR adult_user_id	true	varchar	25	Adult unique HostID as assigned by the school.
adult_firstname	true	varchar	50	Adult First name
adult_lastname	true	varchar	50	Adult Last name
child_rel_type	true	varchar	50	Child type of relationship
child_host_id OR child_user_id	true	varchar	25	Child unique HostID as assigned by the school.
child_firstname	true	varchar	50	Child First name
child_lastname	true	varchar	50	Child Last name
parental_access	false	char		Parent access (Y)es, (N)o or leave blank for default setting
list_as_parent	false	char		List as parent (Y)es, (N)o or leave blank for default setting
responsible_for_contract	false	char		Responsible for signing contract (Y)es, (N)o or leave blank for default setting
primary_ind	false	char		Primary (Y)es, (N)o or leave blank
resides_with	true	char		Resides with (Y)es, (N)o or leave blank
no_contact	false	char		No contact (Y)es, (N)o or leave blank

## Role Assignment

The purpose of the User Role import is to assign constituents the appropriate roles once they've been added to the database. Both constituent roles (Teacher, Non-Teaching Staff, Student, Alumni, etc.) and managerial roles (Platform Manager, Data Manager, Academic Group Manager, etc.) can be assigned with this import.

There are four layouts available: Employee, Student, Alumni, and all other roles. Each of these imports have unique file requirements which are defined below. Users are matched on Host ID OR User ID, First Name, and Last Name, so each import has two layouts.

## Employee

### Fields

Column name	Required	Data type	Max length	Description
host_id OR user_ID	true	varchar	25	User's unique HostID as assigned by the school or User ID assigned by the system
firstname	true	varchar	50	First name

lastname	true	varchar	50	Last name
role_description	true	varchar	100	Example: Activity Leader Advisor Coach Dorm Supervisor Non-Teaching Staff Nurse Teacher  If a user is a member of multiple roles they will be listed multiple times in the file.
appointed_date	true	datetime		Appointed date (MM/DD/YYYY)

### Example

Host_ID	Firstname	Lastname	Role_description	Appointed_date
352216589	Jane	Smith	Teacher	07/01/2001
325652148	Robert	Agguire	Non-Teaching Staff	07/01/2016

### Troubleshooting

Error Message	Things to Check
No Match: UserHostID(firstname, lastname,class_of,host_id)	Make sure Host ID matches the Host ID for the user Make sure first name/last name matches the user's first name/last name
No Match:UserMain(firstname,lastname,user_id);	Make sure User ID matches the User ID for the user Make sure first name/last name matches the user's first name/last name
Invalid Data: must provide an employee role type.	Check the spelling of the teacher role name – must match the role name online
String was not recognized as a valid DateTime.Couldn't store <> in appointed_date Column. Expected type is DateTime.	Check the format of the date field – must be MM/DD/YYYY

### Student

#### Fields

Column name	Required	Data type	Max length	Description
host_id OR user_ID	true	varchar	25	User's unique HostID as assigned by the school or User ID assigned by the system
firstname	true	varchar	50	First name
lastname	true	varchar	50	Last name
level_description	true	varchar	50	Campus school level
school_year_label	true	varchar	11	School Year Label (YYYY - YYYY)- exact match

grade_level_desc	true	varchar	100	Constituent's grade level for school year label supplied (above)
enroll_date	true	datetime		Student enrollment date. This field appears on transcripts.

### Example

Host_ID	Firstname	Lastname	Level_description	School_year_label	Grade_level_desc	Enroll_date
35221	Sally	Roberts	Upper School	2019 - 2020	9 <sup>th</sup> Grade	9/1/2012
32565	Jake	Callahan	Lower School	2019 - 2020	4 <sup>th</sup> Grade	9/1/2015

### Troubleshooting

Error Message	Things to Check
No Match: UserHostID(firstname, lastname,class_of,host_id)	Make sure Host ID matches the Host ID for the user Make sure first name/last name matches the user's first name/last name
No Match: UserMain(firstname,lastname,user_id);	Make sure User ID matches the User ID for the user Make sure first name/last name matches the user's first name/last name
String was not recognized as a valid DateTime. Couldn't store <> in appointed_date Column. Expected type is DateTime.	Check the format of the date field – must be MM/DD/YYYY

## Alumni

### Fields

Column name	Required	Data type	Max length	Description
host_id OR user_ID	true	varchar	25	User's unique HostID as assigned by the school or User ID assigned by the system
firstname	true	varchar	50	First name
lastname	true	varchar	50	Last name
role_description	true	varchar	100	Descriptive name of the Role. Example: Alumni
class_of	true	char		Constituent's alumni year affiliation

### Example

Host ID	Firstname	Lastname	Role description	Class of
291839183	Atticus	Finch	Alumni	1961
291820298	Harper	Lee	Alumni	1994

## Troubleshooting

Error Message	Things to Check
No Match: UserHostID(firstname, lastname, class_of, host_id);	Make sure Host ID matches the Host ID for the user Make sure first name/last name matches the user's first name/last name
No Match: UserMain(firstname, lastname, user_id);	Make sure User ID matches the User ID for the user Make sure first name/last name matches the user's first name/last name
Invalid Data: must provide an alumni role type.	Check the spelling of the alumni role name – must match the role name online
Invalid data: class_of must be between 1775 and 2100.	Check the format of the grad year field – must be YYYY

## Other Roles

Other role types include Educational consultant, friend, trustee, past trustee.

## Fields

Column name	Required	Data type	Max length	Description
host_id OR user_ID	true	varchar	25	User's unique HostID as assigned by the school or User ID assigned by the system
firstname	true	varchar	50	First name
lastname	true	varchar	50	Last name
role_description	true	varchar	100	Descriptive name of the Role. Example: Educational consultant, friend, trustee, past trustee.

## Example

Host_ID	Firstname	Lastname	Role_description
352216589	Jane	Smith	Trustee
325652148	Robert	Agguire	Grading Manager

## Troubleshooting

Error Message	Things to Check
No Match: UserHostID(firstname, lastname, class_of, host_id);	Make sure Host ID matches the Host ID for the user Make sure first name/last name matches the user's first name/last name
No Match: UserMain(firstname, lastname, user_id);	Make sure User ID matches the User ID for the user Make sure first name/last name matches the user's first name/last name
Invalid Data: must provide an other role type.	Check the "other role" name – must be one of the allowable roles, and match the role name online

## User Education

The User Education import allows you to import user education records for constituents. If a constituent has more than one education record they can be included in the file more than once. The import will perform a record update if it finds an exact database match on both 'school' and 'grad\_year' for a user, otherwise it will insert a new record.

### Fields

Column name	Required	Data type	Max length	Description
host_id OR user_id	true	varchar	25	User's unique HostID as assigned by the school or User ID assigned by the system
firstname	true	varchar	50	First name
lastname	true	varchar	50	Last name
school	true	varchar	100	School
degree	false	varchar	100	Degree/Diploma
grad_year	false	char	4	Grad Year (4 digit year)
major	false	varchar	100	Major
field	false	varchar	50	Field
sort_order	false	int		Sort Order (specific to the user's education records)

### Example

Host_ID	Firstname	Lastname	School	Degree	Grad_year	Major	Field	Sort_order
352216589	Jane	Smith	Boston College	B.A.	2000	Education	Education	10
352216589	Jane	Smith	Boston University	M.S.	2006	Curriculum Design	Education	20
325652148	Robert	Agguire	Georgia Institute of Technology	B.S.	1998	Physics	Science	10

### Troubleshooting

Error Message	Things to Check
No Match: UserHostID(firstname, lastname,class_of,host_id)	Make sure Host ID matches the Host ID for the user Make sure first name/last name matches the user's first name/last name
No Match: UserMain(firstname,lastname,user_id);	Make sure User ID matches the User ID for the user Make sure first name/last name matches the user's first name/last name

## Faculty/Staff Employment File Layout

The employee directory update is not a self-managed import, but your school's Data Analyst can complete a one-time data import to assign directory information, including school levels, departments, and grade levels for faculty and staff.

Employment: John Smith	
Date Appointed:	1/1/2000
Employee Roles:	Coach, Teacher
School Levels:	Upper School
Departments:	Phys Ed/Health (US)
Grade levels:	9th Grade, 10th Grade, 11th Grade, 12th Grade

Prior to submitting this file your employees must exist in Core with their roles assigned.

All Grades and Departments must also be set up in Core before sending this file. Your Core Consultant will assist with setting up your Grade levels and Departments. The naming conventions in the file should match Core.

### Fields

Column Header	Required	Max length	Description
hostid	Yes	25	Unique identifier supplied by the school for the user.
firstname	Yes	50	First name
lastname	Yes	50	Last name
dept1	No	25	Name of the first department to link the employee to
level1	No	25	What level is the first department associated with?
chair1	No	3	Is the employee a chair person for this department?
dept2	No	25	Name of the second department
level2	No	25	What level is the first department associated with?
chair2	No	3	Is the employee a chair person for this department?
dept3	No	25	Name of the third department
level3	No	25	What level is the first department associated with?
chair3	No	3	Is the employee a chair person for this department?
dept4	No	25	Name of the fourth department
level4	No	25	What level is the first department associated with?

chair4	No	3	Is the employee a chair person for this department?
grade1	No	25	What is the first grade to link the employee to?
grade2	No	25	What is the second grade to link the employee to?
grade3	No	25	What is the third grade to link the employee to?
grade4	No	25	What is the fourth grade to link the employee to?
grade5	No	25	What is the fifth grade to link the employee to?
grade6	No	25	What is the sixth grade to link the employee to?
job_title	No	100	Job Title, if not supplied in the Faculty/Staff Employee IDC file.
professional_bio	No		Professional Bio for the user. PLAIN TEXT ONLY. Cannot include any formatting (bold, returns/multi-line, etc) and cannot include any HTML tags.

Note: Only supply "Job Title" if you want to change what the user currently has in Core -or- if they do not have anything in Core and you want one added.