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EE-ImportGuide-102111
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# Import Basics

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Importing records is the process of moving data from other programs into *The Education Edge*. Instead of opening new or existing records individually and adding information, you record the information in an import file and use **Import records** to automatically create a group of new records or update your existing records. Importing records is particularly useful if your organization maintains multiple databases, if you need to combine two or more databases into one, and when you initially set up your database.

Before importing data into your database, you should fully understand how the importing process works. If done correctly, importing records into *The Education Edge* is an easy, time-saving task. If done incorrectly, it may require a significant amount of time to clean up your database, running queries to ensure data imported to the correct fields, and even running global changes to correct errors. We strongly recommend that you acquire a full understanding of the importing process before proceeding with an import.

The *Import Guide* discusses the basics of importing, such as setting up and formatting import files, using headers, and identifying required fields. You will also find procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records. The troubleshooting section at the end of the chapter provides tips and possible solutions for problems you might encounter while importing.

The other chapters of this guide address individual import types for **Registrar’s Office** and **Admissions Office**. For example, in the Registrar’s Office Imports chapter, you can find examples and information about special rules and required fields for each **Registrar’s Office** import type.

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**Note:** Visit our Web site at www.blackbaud.com for the latest documentation and information.

**Warning:** We strongly recommend you back up your database before importing new records or updating existing records. You cannot undo an import; however, you can revert to a backup database.
Accessing Import

The Import records page is the starting point for importing records. To access the Import records page, click Import records on the Administration page of Admissions Office or Registrar’s Office. The Import records page appears.

From this page, you can add a new import record or open an existing record. You also select the type of import to create. A tree view on the left displays each import type and its record components. You can select only one import type at a time.

Parts of an Import Record

You create an import by setting parameters in the import record. The import record consists of four tabs you use to define how data imports into your database.
General Tab

On the General tab, you select the type of import function you need to perform, the location of the import file, and the import file format. Depending on the import function you select, other fields and options become available. These options are addressed in detail throughout this chapter. For more information about selecting an import function, see “Getting Started” on page 8.

File Layout Tab

On the File Layout tab, you specify how to format data in the import file. The options available on this tab depend on the data format you select on the General tab.

Glossary: Field separators determine where a field begins and ends. You can use commas, tabs, semicolons, spaces, or other such separators.
If you select to use a delimited format, you must specify a field separator and text qualifier. You also specify where field names appear in the import file. For more information about using the delimited format, see “Delimited Data Formats” on page 10.
If you select to use a fixed width format, a grid shows how fields appear and the breaks between text. In the grid, you can edit field widths by changing the number in the **Field Length** column. For more information about using fixed width formats, see “Fixed Width Data Formats” on page 10.

![Image of a grid showing field names and lengths](image)

For both file formats, the **Sample Import Format** frame shows how fields will import into the database based on character separators or field length. This frame appears only when you are importing new records or updating records.

If you are creating an import file, field names appear on the first line of the import file automatically. If you are exporting records, you must specify where field names appear in the import file.

**Fields Tab**

When importing new records or updating existing records, you use the Fields tab to match data in the import file with **Education Edge** record fields. The **Available fields** box lists all fields available for the record type you selected to import. Required fields appear in bold type. For more information about required fields, see “Required Fields” on page 13.
In the **Import these fields** grid, the **Field to Import** column displays the fields in the import file. If the first line of the import file does not have field names, the program displays the first row of data. For more information about matching fields on the Fields tab, see “Mapping fields on the Fields tab” on page 28.

### Options/Summary Tab

The options available on the Options/Summary tab depend on the import function you select on the General tab. When importing or updating records, you can select to create an exception file listing all records that could not be imported or updated. You can also create a query of records imported or updated. For all import functions, you can select to preview or print a control report, which lists the results of the import, the file criteria, the field mappings, and import exceptions.
The Import Summary Information frame displays a summary of all parameters you set for the import file, including the data formatting and fields included. You can use this summary to identify changes you need to make before importing.

Getting Started

After selecting the type of import to create on the Import records page, the first step of the import process is to decide which type of import function you need to perform. Frequently you use more than one import function together to complete an entire import process. For example, to update records using Import, you export records, make changes in another application, and then import the records back into The Education Edge.

In the What do you want to do? frame on the General tab, you select one of these options:

Import new records. Use Import new records to import record information created in non-Blackbaud applications to add new records or combine databases. For more information about importing new records, see “Importing New Records” on page 43.

Update existing records. Use Update existing records to update one or more existing records in your database at one time. This function is most often used after you export records out of The Education Edge and make changes in another application. For more information about updating records, see “Updating Existing Records” on page 48.

Create import file. Use Create import file to create a header file of field names. You can use the header file as a template for formatting a new import file in another application, such as Excel. For more information about creating a header file, see “Creating a Header File” on page 22.

Export records. Use Export records to export a file of records so you can make changes or view the data in a different application. Once you make changes to the file, you can then import the file back into your database using Update existing records. For more information about exporting records, see “Exporting Records” on page 32.
Setting Up Imports

**Warning:** Make sure to back up your database before importing new or updated records.

It is important to set up import files properly so you can avoid errors that require cleaning up your database, running queries to ensure data imported to the correct fields, or running global changes to make corrections. Make sure to always back up your database before importing new or updated records so you can revert to the backup, if necessary.

This section includes information to help you better understand decisions you make during import setup including:

- How should you format the data in the import file?
- Which fields are required? What other fields do you need to include?
- Should you include a header file?
- Should you use default sets?
- Should you add new table entries during the import?
- Should you use extensions? If so, for which fields?
- How should you handle many-to-one items?

**Formatting Import Files**

**Note:** We recommend using *.csv as your data format because it is the easiest to use with The Education Edge.

On the General tab, you must define formats for your imported data files. Import accepts several different types of text formats including *.txt, *.csv, and *.xls. We recommend using *.csv as your text format because it is the easiest to use with The Education Edge.
The text format you use often determines whether you should use a delimited or fixed width data format. You select the text format to use on the General tab.

If you use Microsoft Excel to create an import file with delimited format, you do not have to manually insert text qualifiers and field separators. However, if you create your import file in a word processing program or using Notepad, you must manually add text qualifiers and field separators when entering your data.

**Delimited Data Formats**

Delimited is a file format in which fields are separated by characters, often commas. For delimited format imports, the format of import data must follow these guidelines:

- **Glossary:** Text qualifiers enable the program to distinguish between actual punctuation in a string of text and the field separator.
  
  - In delimited format you must use text qualifiers and field separators, such as commas and quotation marks.
  
  If you are using Microsoft Excel to create an import file with delimited format, you do not have to manually insert text qualifiers and field separators.

- **Glossary:** A carriage return/line feed (CR/LF) indicates a hard break. To insert a CR/LF in your document, press the ENTER key on your keyboard. In Import, each record in the import file must end with a CR/LF.

  - When using delimited format, you must end each record in the import file with a carriage return/line feed (CR/LF) by pressing the ENTER key on your keyboard.

**Fixed Width Data Formats**

Fixed width is a format in which fields in your import file are separated based on the number of characters allowed for each field. Some non-Blackbaud programs export only in fixed width format, so you may find situations when you need to use this data format.
For fixed width format, you define the length of the fields you intend to import. For example, if you set the length of the first field at 20, the program imports exactly 20 characters. If the field in the import file actually has over 20 characters, the 21st character is truncated into the next field.

***For example, this student import file has five fields. In order, the field lengths are 2, 15, 9, 10, 11. The third field is a name. The maximum possible width for that field is 9 spaces, so for any name with less than 9 digits, the import file inserts spaces to occupy that space.

<table>
<thead>
<tr>
<th>Enrolled</th>
<th>Karen Steimray</th>
<th>123-45-6789</th>
</tr>
</thead>
<tbody>
<tr>
<td>current</td>
<td>1</td>
<td>Student</td>
</tr>
<tr>
<td>Jason</td>
<td>Stannard</td>
<td>238-79-5431</td>
</tr>
<tr>
<td>1</td>
<td>Michael</td>
<td>Andrews</td>
</tr>
<tr>
<td>222-22-2222</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Christine</td>
<td>Steimray</td>
</tr>
<tr>
<td>333-65-5899</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Michael</td>
<td>Steimray</td>
</tr>
<tr>
<td>231-90-5764</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Daryl</td>
<td>Ships</td>
</tr>
<tr>
<td>336-54-7845</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Kerry</td>
<td>Fingle</td>
</tr>
<tr>
<td>352-45-1485</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Sean</td>
<td>McTear</td>
</tr>
<tr>
<td>298-43-7845</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Linda</td>
<td>Queen</td>
</tr>
<tr>
<td>154-43-7894</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Glossary:** A carriage return/line feed (CR/LF) indicates a hard break. To insert a CR/LF in your document, press the ENTER key on your keyboard. In Import, each record in the import file must end with a CR/LF.

When using fixed width format, you must end each record in the import file with a carriage return/line feed (CR/LF) by pressing the ENTER key on your keyboard.

### Using Headers in Import Files

Use headers in import files to define the names of the fields used in the file so the program can match the data contained in the file with the appropriate fields on records. Headers are the first line of the import file or you can create a header record as a separate import file.

**Note:** Although headers are not required to import, we recommend using them because they help you organize fields and make sure you include all required fields.

For instance, in the Excel example below, line 1 is the header line containing the import data field names. The actual data starts on line 2.

**Warning:** We strongly recommend that you compose your import file in an Excel spreadsheet when possible. The spreadsheet allows you to compose the file without worrying about text qualifiers or field separators.
When creating headers for import files, you can use the import field names assigned by *The Education Edge*, the field names used on the record, or you can create field names of your own that better distinguish the purpose of the field. If you create your own field names, you need to map each created field name to its *Education Edge* equivalent on the Fields tab. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.

Using the Create import file process, you can create a header file that includes the minimum set of required fields needed to save the selected type of record. You can use a header file as a template for formatting a new import file in another application, such as *Excel*. Keep in mind, using only the minimum required fields will create records that lack details recommended for maintaining accurate and complete records. We recommend adding on the Fields tab all other fields you normally use when adding records through the Records page. For more information about required fields, see “Required Fields” on page 13. For more information about creating a header file, see “Creating a Header File” on page 22.

**Import IDs**

*Glossary:* An import ID is a unique number used to identify each import record. The program uses this ID to update existing records in your database.

*The Education Edge* uses the IDs you specify in the import to match imported data with record fields in the database. The program also uses import IDs to check for duplicate records and to link records.

On the General tab, you select whether to use an import ID or the record ID to match imported records with existing records. The ID type you select becomes a required field and appears bold on the Fields tab to indicate that it is required.

To find the import ID for a record, you can open the record and select File, Properties. To find import IDs for multiple records, you can create a query of record properties.

These rules apply to import IDs:

- All IDs must be unique.
- An ID can contain up to 20 characters.

*Note:* If you use Social Security Numbers as an identifier when importing records, you must include the dashes when entering the number in your import file.
• A record ID depends on the record type. For example, in a student import, the record ID is the student ID. You can determine which identifiers to use for a specific import type by looking at the options available in the Use [ ] to match records in the import file with existing records field on the General tab.

• When importing new records, you can assign a unique import ID in the file you are importing. If you do not assign an import ID, the program automatically defines an ID for each record that cannot be changed.

• You cannot update records if your import file does not include an import or record ID. To quickly add an ID, export the record’s program-assigned import ID and add it to the import file.

### Required Fields

**Note:** When you use Import to add new records, the import file must include the required fields for that type of record.

When you use Import to add or update records, the import file must include the required fields for that type of record. The **Available fields** box on the Fields tab lists all fields available to import for the selected record type. All required fields appear in bold type; however, some bold fields are only conditionally required. Conditionally required means they are required only when you are importing additional record components.

**Tip:** If you are importing only a component of a record, such as attributes, you can select the record component in the <Show All Fields> field in the **Available fields** frame. This narrows the fields listed to only those for that component.

For example, to import a new individual record, **Last name** is the only field you must include to save the record (assuming you do not have Configuration settings requiring others). However, there are many additional fields in the **Available fields** box that are bold. You are required to add other fields only if you want to import additional record components. For example, if you are importing individuals, even though **Attribute Type** and **Attribute Description** are bold, they are required only when you import Individual attributes.
Which Fields are Required?

To save time and effort, it is critical to the import process that you understand how to determine which fields are required. Here are two methods you can use to identify required fields:

- Open a new record of the same type to import and find all highlighted fields required to save the record. Those same fields are required in the import file plus some additional fields required only for importing. Required fields on a record are cyan by default but may be another color depending on your color options settings. This method does not identify every field that is required to import but it does provide you with a visual representation of what needs to be included.

- The reliable method is to create an import file for the record type and select Include required fields in the file on the General tab. The file includes the minimum set of required fields needed to save that type of record. Keep in mind, using only the minimum required fields creates records that lack details recommended for maintaining accurate and complete records. We recommend adding on the Fields tab all other fields you normally use when adding records through Records.

Other important factors to keep in mind about required fields:

- Depending on optional fields you import, other fields may become required. For example, when you import rooms, if you include the Has maximum capacity field, the Maximum capacity field then becomes required so you must also add it as well. The Maximum capacity field is not bold on the Fields tab.

- Certain fields, such as Course category, are defaults when adding records manually through Records. However, these fields are required and must be included in the import file when adding records through Import.

- Required fields are also determined by your settings on the Fields tab in Configuration. Any field you designate as required in Configuration must be included in the import file.
Default Sets

You can use default sets when adding or updating records in Import just as you can in *Records*. You can use pre-defined sets or create new ones.

- To use a pre-defined set, on the Fields tab, enter a name in the *Import Records using this default set* field, or click the binoculars to select a default set on the Field default sets screen.
- To create a new default set to use in the import, click the binoculars in the *Import Records using this default set* field. The Field default sets screen appears. Click **New** to create a new default set. For more information about creating default sets, see the *Program Basics Guide*.

- If you use a default set, you do not have to include fields with default values in the import file. Import adds default values automatically to each record in the import file.
For example, you are importing a group of applicant records and want to assign each applicant in this group a status of Applied. You can use a default set which contains a default value of Applied for the **Status** field. Every imported applicant will have Applied assigned to the **Status** field. You do not need to include the **Status** field in the import file.

- If you include a field in the import file, but also use a default set that includes a value for that field, the value in the import file is used instead of the default set value. If the field in the import file is blank, then the default set value is used.
- The program validates values in default sets using the same criteria as values in an import file.

### Table Entries

**Note:** We recommend that you do not add table entries when importing because it may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, or DR.

If an import includes fields that contain table entries, you can either use existing table entries from *Configuration* or you can mark the **Create new table entries** checkbox on the General tab to add new table entries while importing. However, we recommend that you do not add table entries when importing because it may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, or DR. If you choose not to create new table entries and the import contains an item not found in the field’s table, the import of that record fails and creates an exception.

- On the General tab, you can designate that imported table entries use a long or short description. The selected format is used by default only when you do not specify a format in the import file.

**Note:** To view the description format for a table entry field, select the field and click **Change** on the action bar. You can select Long Description or Short Description. This option is not available for every field.

- You can manually change the description formatting for some tables, such as **Current grade**, at the field level. On the Fields tab, select the table entry field and click **Change** on the action bar. The Edit Field Criteria screen appears. To change the long or short description, select a format and click **OK**.
- To view the table values available for a field, on the Fields tab, select the field in the **Import Field** column, and click **Browse**. The Browse screen appears showing possible values for this field. Using this feature is also helpful when you are unsure about how to format a field.

### Extensions

**Warning:** When importing multiple characteristics for an item, if you do not use extensions or if you match them up incorrectly, data may appear in the wrong fields on records.

Use extensions when multiple characteristics exist for the item you are importing, such as multiple notes, attributes, actions, or distributions. The program automatically assigns extensions on the Fields tab, beginning with 00 and can increase to 99. You can also manually assign extensions in the **Extension** column. It is important to ensure that program-assigned extensions are set correctly. If you do not use extensions or if you match them up incorrectly, data may appear in the wrong fields on records. You can edit extension numbers in the **Extension** column by clicking in the field and selecting a different number.
Examples of Using Extensions

When you import faculty/staff members with two phone types, an extension is used for each phone type and phone number so the program can match phone types with the correct phone numbers. The sample faculty/staff import file featured below includes header field names (line 1) and five faculty/staff records (lines 2-6), each having two different phone types.

When you set up an import using this file, on the Fields tab, the program adds extensions to match the Phone Type and Phone Number fields in the import file to the correct Education Edge fields. If you do not use extensions or if you match them up incorrectly, data may appear in the wrong fields on records. For example, if you fail to match phone types with their correct phone numbers, you could inadvertently import home phone numbers as office phone numbers.

You can also create more intricate imports that import multiple “many-to-one” items at one time. (Many-to-one items are explained in the next section.) For example, you can import a student with two addresses, home and vacation, where each address has a phone number and email address. The sample student import file featured below illustrates how to set this up. The file includes header field names (line 1) and two student records (lines 2-3) with address and phone information.

The cells highlighted in yellow are fields for the students’ first address and those highlighted in blue are the second address. It is important to group contact types and numbers so they appear directly after their respective address in the import file so you can assign extensions correctly in the program.
The import file appears in the program as shown below.

The program assigns extensions automatically but you will need to edit the extensions for the second group of contact types and numbers (with extensions 02 and 03) so they import with the second address. Change the 02 extensions to 00 and the 03 extensions to 01. If you do not change these extensions, all four contact types and numbers import to the first address. The picture below demonstrates how the updated extensions appear.
Many-to-One Items

“Many-to-one” describes items for which multiple characteristics exist, such as addresses, attributes, or relationships. For example, you can have several address types for a student, such as home, school, and vacation. You can also designate which of these addresses is primary and which is seasonal. Importing these items requires special attention to ensure that data in the import file matches up with the correct fields in the record.

The following sections address special rules and considerations for many-to-one items.

Attributes

- If you import multiple attributes, the program assigns each attribute field an extension. For example, if the import file contains multiple attributes for a student, each attribute field is assigned an extension, starting with 00. For more information about using extensions, see “Extensions” on page 16.
- In Configuration, you can assign attributes a unique status. This means you can use the attribute only once on a record. When updating records, if the import file includes a unique attribute, the program generates exceptions for any records for which the attribute is already used.
- All attributes designated required in Configuration are required when updating or adding records in Import. The program generates exceptions for all records in the import file that do not include required attributes.

Addresses

- You can import addresses using one full address field or using individual address fields. To indicate which format to use, on the Fields tab, select the Full address field or select the Address, City, State/Province, ZIP/Postal code, and Country fields.
- When using the full address format, you must enter a carriage return indicator (<cr>) in the address wherever you need a line break. Insert only spaces you want to appear in the address. For example, in this address you need a carriage return indicator after the street address:
  1218 Westbury Lane<cr>Charleston, SC 29403
- To designate an address as the primary address for a record you are importing, select the Primary address field. The field value is either Yes or No. If you do not designate a primary address, the program designates the first imported address for each record as the primary address.
- To make the address uneditable in the Address as it will be printed box, include the Synchronize address field on the Fields tab with a Yes value.
- All imported addresses are formatted according to the address format set on the International tab of Configuration. If no country is specified in the import file, the address is formatted according to the address format set on the General tab of Configuration.
- When updating addresses for records, you must include the record import ID and the address import ID. You can use the Export records function to identify address import IDs.

Phone Numbers and Phone Types

- When importing multiple phone types, be sure to assign extensions on the Fields tab for each phone type. For more information about extensions, see “Extensions” on page 16.
- If you import multiple phone types for a record, a separate contact record is created for each on the Addresses tab of the main record. The imported phone types will not appear on the Bio 1 tab.

Warning: Do not forget to enter a carriage return indicator (<cr>) when importing a full address as one field.
Relationships

- Relationships create links among student, applicant, individual, faculty/staff, and organization records. It is important to ensure that fields in the import file match up with the appropriate record fields so relationships import correctly.

- The **Relation ID** field is the record ID for the person or organization who has the relationship with the student, applicant, individual, faculty/staff, or organization. The **Relationship type** field is Personal or Contact. The **Relationship** field is the type of relationship the relation has with the student, applicant, individual, faculty/staff member, or organization.

You must use relationships found in the **Configuration** table unless you mark **Create new table entries** on the General tab, which we do not recommend because of the risk of creating duplicate entries. The **Reciprocal relationship** field is the reciprocal relationship the person/organization has with the relation. For example, to add a relationship for a student and his father, enter the father’s ID for **Relation ID**, Personal for the **Relationship type** field, Father for the **Relationship** field, and Son for the **Reciprocal relationship** field.

You cannot add a relationship if a record does not already exist for the corresponding relation. For example, you cannot add the father in the previous example as a relation if an individual record does not already exist for the father. In this case, it is easier to add a record for the father manually using the Relationships tab on the son’s record in **Records**.

- When importing multiple relationships, be sure to assign extensions on the Fields tab for each relation. For more information about extensions, see “Extensions” on page 16.

Formatting Import Fields

When creating or updating import files in other application, such as **Excel**, there are text formatting rules for carriage returns, spaces, and currency entries.

Carriage Returns

**Glossary:** A carriage return/line feed (CR/LF) indicates a hard break. To insert a CR/LF in your document, press the **ENTER** key on your keyboard. In Import, each record in the import file in delimited format must end with a CR/LF.

- A carriage return/line feed (CR/LF) or “hard return” is not allowed within a field, only at the end of a record.
- If you need to use a CR/LF in memo fields (for example, Notepad), use /N.

Spaces

- Do not use spaces between fields.
- If you are importing a field that is not required, leave the entry field blank or use spaces for any record that does not have an entry for that field. Import ignores blank fields.
- When updating records, to clear a field that currently contains data, enter a caret (^) character [SHIFT + 6] in the field.

Currency Entries

- You can have up to 10 digits before the decimal point and two digits after (xxxxxxxxxx.yy).
- The currency symbol ($) is not required.
- The decimal point and digits after it are required only for uneven dollar units. For example, you can enter two hundred dollars as 200, but you must format twenty-five dollars and fifty cents as 25.50.
Additional Considerations

These items are also important to consider before importing data:

**Warning:** You cannot undo an import; you can only revert to a previous copy of your database. Therefore, it is important to frequently back up your database while running imports.

- Perform a backup of your database. If importing several sets of data, back up your database after you import each set.
- Validate and test the import file before running the actual import. For more information about validation and testing, see “Testing and Validating Import Files” on page 21.
- Close all applications except Windows and The Education Edge.
- Perform the import on your fastest computer. If possible, use the file server terminal.
- If you work on a network but use the stand-alone version of The Education Edge, log out of the network while importing.
- The more record types you include in a import file, the longer the import takes and the greater the chance of errors. If you are importing multiple record types, we recommend that you import each record type separately. For example, if you are importing students, student enrollment, student attributes, and student relationships, we recommend breaking this up into separate imports for each type.
- Make sure you have security rights to all fields you want to update or add. A warning message appears if you include a restricted field in an import. Also, you cannot open a saved import unless you have security rights to all fields included in the import.
  
  Furthermore, you must have the appropriate security rights to run an import that contains credit card, bank account, and Social Security numbers. When you browse fields that contain credit card, bank account, and Social Security numbers, the numbers are always masked. If you do not have output rights, numbers are masked in the export file when you export records from Import. Credit card, bank account, and Social Security number are not masked on the File Layout tab since, in this case, the numbers are pulled from your import file, not the Education Edge database. For more information, see the Security chapter of the Administration Guide for The Education Edge.
- Check business rules before importing or updating records with new items. Business rule settings can affect the way new records are imported or cause exceptions. For example, if business rules are set to automatically generate student/applicant IDs and to prevent data entry in the Student or Applicant ID fields, the program adds a program-generated ID to each new student/applicant record rather than the student/applicant ID from the import file.
  
  Also, if business rules are set for the program to ask before creating an item, those items are not created while importing records. For example, if the business rule is set to ask before adding requests to fulfill course rules, when you import requests for courses assigned this type of course rule, you receive exceptions.

Testing and Validating Import Files

**Warning:** We recommend that you validate and test an import file before running the actual import process.

Because the import process can make significant changes to the database that cannot be reversed, we recommend that you validate and test an import file before running the actual import process. To validate an import file, on the General tab, mark **Validate data only** in the Options frame. This process safely identifies import errors before actually importing or updating data.

**Note:** On an exception report, the **Record No.** column lists the record number for each record generating an exception.
If an import fails validation, check the control report to identify exceptions. Exceptions occur when data in the import file violates the rules established for that record type, such as those for required fields, field lengths, business rules, and duplicate criteria. On the Options/Summary tab, you can select to create an exception file which includes all records that fail validation. After fixing errors found in the exception file, you can run the import again using the corrected file of records.

Warning: We recommend that you test an import file by running it in the sample database and then thoroughly examining the results of those changes to individual records. If you want to test an import file with records in your live database, we suggest testing the file on only one or two specific records.

After an import file validates successfully, we recommend further testing the import because errors can occur even when an import processes without exceptions. For example, fields may not update as you intended or text may not format correctly. Correcting such errors can be as simple as changing a setting or remapping fields; however, you should identify errors before making significant changes to your database.

You can test an import file by running it in the sample database and then thoroughly examining the results of those changes to individual records. If you want to test an import file with records in your live database, we suggest testing the file on only one or two specific records. That way any errors that need to be fixed manually are isolated to only those records.

Basic Import Procedures

Depending on what you want to accomplish, importing often consists of a combination of processes and functions. For example, to update records using Import, you must export records, make changes in another application, and then import the records back into The Education Edge.

The following procedures provide the steps necessary to complete basic import processes, including creating a header file, working with an import file in Excel, mapping fields on the Fields tab, and exporting records. Keep in mind that each of these procedures is only one part of the whole importing process. You can find procedures for importing new records and updating existing records in “Advanced Import Procedures” on page 42. For information about importing specific import types, see “Admissions Office Imports” on page 59 or “Registrar’s Office Imports” on page 99.

Creating a Header File

Note: Although headers are not required to import, we recommend using them because they help you organize fields and help you make sure you include all required fields.

Headers are used in import files to define the names of the fields used in the file so the program can match the data contained in the file with the appropriate fields on records. Headers are the first line of the import file or you can create a header record as a separate import file. You can use a header file as a template for formatting a new import file in another application, such as Excel.

Using the Create Import File process, you can create a header file that includes all fields, selected fields, or the minimum set of required fields needed to save the import type. Keep in mind, if you select to include all fields, the header file will include every field possible for that import type — including many that you may not need. However, if you select to include only the minimum required fields, in some cases this adds only a few fields to the header file. For example, if you create a header file for the Individual import type, the only required field is Last Name (assuming you do not have Configuration settings requiring others). Creating records with only the minimum required fields result in records that lack details recommended for maintaining accurate and complete records.

When creating a header file for importing new records, we recommend that you use the Include required fields in the file option and then, on the Fields tab, add all other fields you normally use when adding records through Records. If you are updating records, use the Include selected fields in the file option. For more information about identifying required fields, see “Required Fields” on page 13.
Creating a header file

1. On the Import records page, select from the tree view the record type for which to create a header file.

2. On the action bar, click New Import. The Import screen appears on the General tab.


4. In the Options frame, mark the option designating which field names to include in the header file.
   - Mark Include selected fields in the file to include only the fields you select manually on the Fields tab.
Select this option if you plan to use the header file to update existing records, not if you plan to import new records.

- **Mark Include required fields in the file** to include only fields required to save the type of record being imported.

Select this option if you plan to use the header file to import new records. Keep in mind, however, using only the minimum required fields creates records that lack details recommended for maintaining accurate and complete records. We recommend adding additional fields on the Fields tab. For more information about required fields, see “Required Fields” on page 13.

- **Mark Include all fields in the file** to include every field once. If you need to use one field multiple times, you must add those fields manually and add extensions. For more information about using extensions, see “Extensions” on page 16.

5. In the **Import file** field, enter the path of the data file you are creating or click the ellipsis to browse to the file.

6. In the **Use [ ] to match records in the import file with existing records** field, select the type of ID to use to identify the records.

7. In the **What is the format of this import file?** frame, **Delimited** is the default data format. You cannot create a header file in fixed width format.
8. Click **Next**. The File Layout tab appears.

9. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers to use in the header file.

   If you select “Other” in the **Field separator** field or “Custom” in the **Text qualifier** field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

   In the **Import Field Names** frame, **Field names will be on the first line of the import** is the default value.

10. Click **Next**. The Fields tab appears.

    **Note:** To delete a field from the import, select the field in the **import these fields** grid and click **Remove**. To delete all field names, click **Clear Fields**. To change the order of fields, select a field in the **import these fields** grid and click the up or down arrow.
11. If you marked **Include all fields in the file** or **Include required fields in the file** in the **Options** frame on the General tab, fields appear in the **Import these fields** grid.

12. If you marked **Include selected fields in the file** in the **Options** frame on the General tab, no fields appear in the grid. You must manually map the fields to include in the header file. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28. Continue until you select all the fields to include in the header file.

13. To view a list of possible values for a particular field, select the field in the **Import Field** column and click **Browse**. For more information about viewing sample field values, see “Table Entries” on page 16.
14. Click **Next**. The Options/Summary tab appears.

![Image of Import Options tab]

**Note:** If you select to preview the control report, you can print it from the preview screen.

15. In the **Import Options** frame, mark **Create control report** to view or print a report showing the header file formatting and the fields included. Mark **Preview** to view the report on your screen or **Print** to send the report to your printer.

16. Review information in the **Import Summary Information** frame. If you need to make changes, you can return to previous tabs and change settings.

17. Click **Create Now**.

18. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

19. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import.

20. Click **Save**. Once the program begins processing the import, a progress bar appears.

21. When the import is finished, the The Education Edge - Process screen appears showing the number of records processed, number of records created, and number of exceptions. When you create a header file, the results for each of these is zero because no changes are made to records.

![Image of The Education Edge - Process screen]
22. If you marked Create control report on the Options/Summary tab, click Close on the Import screen for the report to automatically open. If you did not mark Create control report, you can see import results by clicking View Control Report on the The Education Edge - Process screen. When you finish viewing the report, close it to return to the import record.

Mapping Fields on the Fields Tab

Mapping fields is the process of matching fields contained in an import file to their Education Edge equivalents. It is very important to map fields correctly to prevent creating exceptions and to ensure information imports into the correct fields on records. Mapping fields is easier if you arrange fields in the same order as fields are listed on the Fields tab. You do not have to map all fields in your import file. If a field is not required, you can run an import without mapping the field.

- Mapping fields on the Fields tab

**Tip:** Mapping fields is easier if you arrange fields in your import file in the same order as fields are listed on the Fields tab.

1. From an open import record, select the Fields tab. The Fields tab appears.

If you included field names in the import file, they appear in the Field to Import column. The program automatically maps those fields to their equivalents in the Import Field column. Check these mappings to make sure they are correct.

If you did not include field names, the first row of data from your import file appears in the Field to Import column. You must manually map the field data to their equivalents in the Import Field column.
2. If you used field names the program does not recognize, you must manually map field names. The field names you used appear in the Field to Import column.

3. In the Import these fields grid, select the row you want to map to an import field.

Tip: In the Available fields box, you can select multiple fields at one time. Press the Ctrl key while selecting one field at a time, or press the Shift key while selecting consecutive fields.

4. In the Available fields box, select the Education Edge field which corresponds to the field you are importing, and click Select. The Education Edge field moves to the Import Field column. Continue until you map all the fields to import.

• If the import file has multiple occurring fields, such as student attributes, you must enter an extension in the Extension column. For more information about using extensions, see “Extensions” on page 16.
• If you use a default set, you do not have to include fields with default values in the import file. Import adds default values automatically to each record in the import file. Click the binoculars in the **Import Records using this default set** field to search for a saved default set or to create a new one. For more information about using default sets, see “Default Sets” on page 15.

![](image)

• To remove a field from the **Import Field** column, select it and click **Remove**. If a field is not required, you can run an import without mapping the field. The program ignores that field in the import file. If you remove a field that is required, any records requiring that field will be exceptions.

![](image)

**Note:** Not all table entry formats can be edited. In that case, the **Change** button remains inactive.
• To change the description format for a table entry field, select the field and click **Change**. The Edit Field Criteria screen appears. To change the long or short description, select a format and click **OK**. This option is not available for every field.

![Edit Field Criteria](image)

• To view a sample of possible values for a field in the **Import these fields** grid, select the field and click **Browse**. The Browse screen appears.

![Browse 'Current status'](image)
• To clear your selections and restore the mappings created by the program, click **Update Fields**.

• To remove all mapped fields, click **Clear Fields**.

5. Click **Next** or **Import Now** to continue with the import.

**Exporting Records**

**Warning:** When exporting a file to update, make sure you include the import ID to the fields to export.
When you export records, you export a file of data to a designated location so you can update or view the data in an application other than *The Education Edge*. For example, you can create a customized report with the data or analyze and manipulate it in a spreadsheet program. Once you make changes to the file, you can then import the file back into your database using **Update existing records**. When exporting a file to update, make sure you include the import ID to the fields to export.

Be careful when exporting records to update. If you select to include all available fields in the export, the export file may also contain Read-Only fields that cannot be updated. To prevent errors when importing the updated file, you can either delete this column of fields from the import file or leave the column in the import file, but remove the import field from the **Import these fields** grid on the Fields tab by selecting it and clicking **Remove**.

### Exporting records

1. On the Import records page, select from the tree view the record type to export.

2. On the action bar, click **New Import**. The Import - <Import type> screen appears on the General tab.
3. In the **What do you want to do?** frame, mark **Export records**.

![Image of the Import dialog box with options selected](image)

4. In the **Options** frame, click **Include**. A submenu appears from which you can select **All records**, **Selected records**, or **Records changed as of**.
   - Select **All records** to include every record of this import type.
   - Select **Selected records** to include records contained in a saved query.
   - Select **Records changed as of** to include records changed since the date you specify.

5. Select which fields to include in the export file.
   - Mark **Include selected fields in the file** to include only the fields you select manually on the Fields tab. Mark this option if you plan to use the export file to update existing records, *not* if you plan to import new records.
   - Mark **Include required fields in the file** to include only fields required to save the type of record being imported.
   - Mark **Include all fields in the file** to include every field once. If you need to use one field multiple times, you must add those fields and extensions. For more information about using extensions, see “Extensions” on page 16.

6. In the **Use [ ] when exporting table entries** field, select the long or short description format to use for fields containing table entries. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

7. In the **Import file** field, enter the path of the data file to create or click the ellipsis to browse to the file.

8. In the **Use [ ] to match records in the import file with existing records** field, select the type of ID to use to identify the records.

9. In the **What is the format of this import file?** frame, **Delimited** is marked by default and **Fixed Width** is disabled. The **Delimited** option creates an export file that contains characters, such as commas, to separate fields. For example, a *.csv file contains a delimited format. For more information, see “Delimited Data Formats” on page 10.
10. Click **Next**. The File Layout tab appears.

![Image of File Layout tab]

11. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.

   If you select “Other” in the **Field separator** field or “Custom” in the **Text qualifier** field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

12. In the **Import Field Names** frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

   If you mark **Field names are in a separate file**, enter the path of the file that contains the field names or click the ellipsis to browse to the file.

13. Click **Next**. The Fields tab appears.

   **Note:** To delete a field from the import, select the field in the **Import these fields** grid and click **Remove**. To delete all field names, click **Clear Fields**. To change the order of fields, select a field in the **Import these fields** grid and click the up or down arrow on the action bar below the grid.
If you marked **Include all fields in the file** or **Include required fields in the file** in the **Options** frame on the General tab, fields appear in the **Import these fields** grid.

If you marked **Include selected fields in the file** in the **Options** frame on the General tab, no fields appear in the **Import these fields** box. You must manually select the fields to include in the import file. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28. Continue until you select all the fields to include in the import file.

14. To view a list of possible values for a particular field, select the field in the **Import Field** column and click **Browse**. For more information about viewing sample field values, see “Table Entries” on page 16.

15. Click **Next**. The Options/Summary tab appears.
In the Import Options frame, mark Create control report to view or print a report showing the export results, including the criteria and fields to include. Mark Preview to view the report on your screen or Print to send the report to your printer.

17. Review information in the Import Summary Information frame. If you need to make changes, you can return to previous tabs and change settings.

18. Click Create Now.

19. The program asks if you want to save changes. To save, click Yes. If this is the first time you have saved the import record, the Save Import As screen appears.

20. In the Name field, enter a name for the import. In the Description field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import.

21. Click Save. Once the program begins processing the import, a progress bar appears. If you click Cancel, the Cancel Import screen appears. On this screen, you can view a control report, resume the export, or exit the export. If you click Exit Import, the export process stops, parameter settings are not saved, and any data exported up to the point of cancellation is in the export file. If you click View Control Report, the control report appears. When you close it, you can resume or exit the export again.

When the import is finished, the The Education Edge - Process screen appears showing the number of records processed, number of records created, and number of exceptions. For an export, the numbers processed and created are the same because no changes are made. The number of exceptions is always zero.

22. If you marked Create control report on the Options/Summary tab, click Close on the Import screen for the report to automatically open. If you did not mark Create control report, you can see import results by clicking View Control Report on the The Education Edge - Process screen. When you finish viewing the report, close it to return to the import record.

**Updating an Export File in Excel**

You can export Education Edge record information to update in other applications, such as Excel. For example, to update address information for a large number of students, you can export a file that contains the specific address fields to change for those records. You can then open this file in Excel, make the necessary changes, and then import the saved file of updated information back into The Education Edge. For information about how to import an updated file, see “Updating Existing Records” on page 48.

This procedure shows you how to update an export file in Excel. For information about how to export records, see “Exporting Records” on page 32.
Updating a Education Edge export file in Excel

1. In Excel, select File, Open from the menu bar. The Open screen appears.

2. In the Files of type field, select “All Files (*.*)”. Then browse to the location of the export file you created in The Education Edge. (This is the same path you entered in the What file do you want to create? frame on the General tab.)

Note: We recommend that you save import and export files in *.csv format. It is easiest to work with in Excel and .

3. Once you locate the export file, click Open. If you saved the export file as *.csv, the file does not require data formatting and opens automatically. Proceed to step 17.

If you saved the export file as *.txt or *.imp, you must format the data. The Text Import Wizard - Step 1 of 3 screen appears.

The Text Wizard has determined that your data is Delimited. If this is correct, choose Next, or choose the data type that best describes your data.

Original data type
Choose the file type that best describes your data:

- Delimited: Characters such as commas or tabs separate each field.
- Fixed width: Fields are aligned in columns with spaces between each field.

Start import at row: File origin: Windows (ANSI)
4. The Text Wizard must use the same data type you selected on the General tab of the import record. For .txt or *.imp files, Excel reads the data as fixed width even if you selected to use a delimited format on the import record. Therefore, it is very important to make sure that you mark the correct data type in the Original data type frame. For this example, we change the data type to a delimited format.

5. In the Start import at row field, select “1” because the export file starts on the first row of the spreadsheet.

6. In the File origin field, select “Windows (ANSI)”, because the export file was created in The Education Edge, a Windows-based program.

7. Click Next. The Text Import Wizard - Step 2 of 3 screen appears. The information that appears on this screen depends on the information selected on the File Layout tab in The Education Edge.

8. In the Delimiters frame, unmark Tab and mark Comma.

9. Leave Treat consecutive delimiters as one unmarked.

10. In the Text qualifier field, select a quotation mark (").
11. Click **Next**. The Text Import Wizard - Step 3 of 3 screen appears.

![Text Import Wizard - Step 3 of 3](image)

12. In the **Column data format** frame, mark **General** and the program converts the export data to *Excel* data formats. Numeric values found in the export file convert to numbers, date values convert to dates, and all other information to text.

13. Click **Advanced**. The Advanced Text Import Settings screen appears.

![Advanced Text Import Settings](image)

14. On this screen, you can select the values used as separators for numeric data in your export file. Use the default settings.

15. Click **OK**. You return to the Text Import Wizard - Step 3 of 3 screen.

16. Click **Finish**. The export file information appears in an *Excel* spreadsheet. In this format, it is easy to edit and add field information for the records.
For this example, we add and update student residence information.

17. Before saving your changes, enter a hard break (press ENTER) at the end of each record. This indicates where each record ends.

18. To save the changes, from the menu bar, select File, Save As. The Save As screen appears.

19. To overwrite the original export file, use the default file name in the File name field. To create a new file, enter a new name in the File name field.

Warning: When editing export files in Excel, if your export file contains special text formatting (such as the date format, which must be mm/dd/yyyy), we recommend that you save the file in *.xls format and then save the file again as *.csv or *.txt. This preserves the data formatting. If you need to make additional changes to the import file later on, open the *.xls version, make the changes, and then save the file again as *.csv or *.txt.
20. In the **Save as type** field, select “*.csv”. This is the easiest format to use with *The Education Edge*.

21. Click **Save**. A warning message similar to the following may appear asking if you want to preserve formatting.

22. Click **Yes** to continue.

23. To close the *Excel* spreadsheet, select **File, Exit** from the menu bar.

24. You can now import the updated records back into *The Education Edge*. For information about importing the file back into *The Education Edge*, see “Updating Existing Records” on page 48.

**Advanced Import Procedures**

The two most critical functions you complete in Import are importing new records and updating existing records. For all import types, records must meet these requirements to import successfully:

- The import file must include all required fields. When importing new records, the required fields are all fields required to save that type of record. When updating existing records, the required fields are only those required to identify existing records.
- You must have security rights to all fields and processes involved in the import.
Importing New Records

Using the **Import new records** function, you can import record information created in non-Blackbaud applications to combine databases and add new records. With this function you can quickly add numerous new records at one time without having to open each individual record to add information. For information about importing a specific type of record, see “Admissions Office Imports” on page 59 or “Registrar’s Office Imports” on page 99. For more information about creating a header file for importing new records, see “Creating a Header File” on page 22.

- **Importing new records**

**Note:** Make you have security rights to all fields to add. If you do not have rights to certain fields, a warning message appears if you select to include the restricted field in your import. Also, you cannot open a saved import unless you have security rights to all fields included in the import.

1. On the Import records page, select from the tree view the record type to import.
2. On the action bar, click **New Import**. The Import screen appears on the General tab.

![Import screen](image)

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. Later, when you later click Validate Now, the import file is validated but no changes are made to your database.

   After you validate the import file and you are ready to run the import, unmark **Validate data only**.

   **Note:** We recommend that you validate and test an import file to ensure it is correct before running the actual import.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, or DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

   **Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

6. If you are importing a record type that has duplicate criteria defined in **Configuration**, the **Use duplicate criteria for new records** option is enabled. Mark this option to prevent creating duplicate records during the import. If the program finds duplicates in the import file, they are processed as exceptions and not imported into the database.

   **Note:** To check for duplicate criteria when importing, you must define duplicate criteria in **Configuration**. For information about defining duplicate criteria, see the **Configuration Guide** for that program.

7. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.
8. In the Import file field, enter the path of the data file to import or click the ellipsis to browse to the file.

9. In the Use [ ] to match records in the import file with existing records field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.

10. In the What is the format of this import file? frame, mark Delimited or Fixed Width.
   - Delimited - Characters separate the fields. Mark this option if the import file contains characters, such as commas, to separate fields. For example, a *.csv file contains a delimited format. For more information, see “Delimited Data Formats” on page 10.
   - Fixed width - Fields and records have a set length. Mark this option to define the length of the import file fields. In the No. of fields field, enter the number of fields found in each record. You can set the length of each field on the File Layout tab. For more information, see “Fixed Width Data Formats” on page 10.

11. Click Next. The File Layout tab appears. Options that appear on the File Layout tab depend on the data format you selected in the What is the format of this import file? frame on the General tab.
   If you marked Delimited - Characters separate the fields on the General tab:
   a. In the Field Separators and Text Qualifiers frame, select the field separators and text qualifiers used in the import file.
      If you select “Other” in the Field separator field or “Custom” in the Text qualifier field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.
   b. In the Import Field Names frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.
      If you mark Field names are in a separate file, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

If you marked Fixed Width - Fields and records have a set length on the General tab:
   a. The Field Name column on the File Layout tab displays field names. To edit the field width, click in the Field Length column and enter a new number.
b. The **Sample Import Format** frame displays a sample of how the import fields appear. Use this preview to find any errors in the field length formatting.

Warning: When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add **Attribute Type** on the Fields tab, you must add **Attribute Description** because it is now required. For more information about required fields, see “Required Fields” on page 13.

12. Click **Next**. The Fields tab appears. On the Fields tab, you match data in the import file with **Education Edge** record fields. For detailed information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.
13. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

![Import Options](image)

14. In the **Import Options** frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

15. Mark **Create an output query of the records imported** to save a query of imported records.

16. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions. If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

17. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

18. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

19. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

20. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.
21. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View Control Report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.

22. If you selected to preview the control report on the Options/Summary tab, click **Close** on the completion screen and the report automatically opens.

23. If you did not select to print or preview the control report, you can see import results by clicking **View Control Report** on the Import screen. When you finish viewing the report, close the report to return to the import record.

### Updating Existing Records

**Tip:** You may have extra fields in your import file that do not need updating. Rather than removing the fields from the import file, you can “unmap” these on the Fields tab by selecting each field and clicking **Remove**. Only mapped fields are included in the update.
After you export records and update them in another application, you can import them back into The Education Edge using Update existing records. The update function replaces data currently in fields with new data contained in the import file. You can also mark Import records not found as new records to add new records for any contained in the import file that are not already saved in the database. To use this option, you must also include the fields required to import new records.

When updating records you must include an import ID in the import file to match new data with existing records. For more information about import IDs, see “Import IDs” on page 12.

For this example we import the file updated in Excel in “Updating an Export File in Excel” on page 37.

- Updating existing records

**Note:** Make certain you have security rights to all fields you want to update or add. If you do not have rights to certain fields, a warning message appears when you select to include the restricted field in your import. Also, you cannot open a saved import unless you have security rights to all fields included in the import.

1. On the Import records page, select from the tree view the record type to update.

2. On the action bar, click **New Import**. The Import screen appears on the General tab.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. To import them, you must change the business rule before importing.
3. In the **What do you want to do?** frame, mark **Update existing records**.

![Import data frame](image)

**Note:** We recommend that you validate and test an import file to ensure it is correct before running the actual import.

4. To validate the import file before actually updating records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database.

After you validate the import file and you are ready to run the import, unmark **Validate data only**.

**Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

6. To add any records contained in the import file that are not already saved in the database, mark **Import records not found as new records**. To use this option, you must also include the fields required to import new records.

7. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

8. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

9. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.
10. In the What is the format of this import file? frame, mark Delimited or Fixed Width.

- **Delimited - Characters separate the fields.** Mark this option if the import file contains characters, such as commas, to separate fields. For example, a *.csv file contains a delimited format. For more information, see “Delimited Data Formats” on page 10.

- **Fixed width - Fields and records have a set length.** Mark this option to define the length of the import file fields. In the No. of fields field, enter the number of fields found in each record. You can set the length of each field on the File Layout tab. For more information, see “Fixed Width Data Formats” on page 10.

11. Click Next. The File Layout tab appears. Options that appear on the File Layout tab depend on the data format you selected in the What is the format of this import file? frame on the General tab.

   If you marked Delimited - Characters separate the fields on the General tab:
   
   a. In the Field Separators and Text Qualifiers frame, select the field separators and text qualifiers used in the import file.

      If you select “Other” in the Field separator field or “Custom” in the Text qualifier field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

   b. In the Import Field Names frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.
If you mark **Field names are in a separate file**, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

If you marked **Fixed Width - Fields and records have a set length** on the General tab:

a. The **Field Name** column on the File Layout tab displays field names. To edit the field width, click in the **Field Length** column and enter a new number.

b. The **Sample Import Format** frame displays a sample of how the import fields appear. Use this preview to find any errors in the field length formatting.

**Tip:** If you do not want to update every field contained in the import file, remove those fields from the Fields tab by selecting the field in the **Import Field** column and clicking **Remove**.
12. Click **Next**. The Fields tab appears. On the Fields tab, you match data in the import file with *Education Edge* record fields. For detailed information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.

13. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

14. In the Import Options frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab in Options. For more information, see the Options chapter of the *Program Basics Guide*.

15. In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.
16. Depending on your settings on the General tab, you can mark **Create an output query of the records imported** or **Create an output query of the records updated** to save queries of updated or imported records.

17. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions. If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

18. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

**Note**: You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

19. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

20. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

21. If you marked **Create an output query of the records updated** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.

22. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. Enter a name and description of the query and click **Save**.

23. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View Control Report**, the control report appears. When you close it, you can resume or exit the import again.
When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions. Records are added in an update only if you marked **import records not found as new records** on the General tab.

23. If you selected to preview a control report on the Options/Summary tab, click **Close** on the completion screen and the report automatically opens.

24. If you did not select to print or preview the control report, you can see import results by clicking **View Control Report** on the Import screen. When you finish viewing the report, close the report to return to the import record.

**Troubleshooting**

**Warning:** Always back up your database before beginning an import or update process. The only way to restore your database is from a backup.

This table lists issues that may occur during import and their possible solutions:
<table>
<thead>
<tr>
<th>Problem</th>
<th>Possible Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exception: Import ID is missing.</td>
<td>Import IDs are required whenever you update records or if you import new items that are linked to other records. For example, if you are importing new students, the student import ID is required. Check the Fields tab to identify which import ID needs to be added to the import file.</td>
</tr>
<tr>
<td>Exception: Import ID is missing. But you included an import ID in the import file.</td>
<td>Make certain you are using the correct import ID for that record.</td>
</tr>
<tr>
<td>Exception: The &lt;unique ID&gt; field is required to update existing records.</td>
<td>Make sure the ID selected in the <strong>Use [ ] to match records in the import file with existing records</strong> field on the General tab is the same ID used in the import file.</td>
</tr>
<tr>
<td>Exception: Field value must be unique.</td>
<td>Mark <strong>Update existing records</strong> instead of <strong>Import new records</strong> on the General tab.</td>
</tr>
<tr>
<td>Exception: Record already exists.</td>
<td>If you are importing new records and the import file contains information about a record that already exists, an exception occurs. Either remove the information from the import file or mark <strong>Update existing records</strong> rather than <strong>Import new records</strong> on the General tab.</td>
</tr>
<tr>
<td>Exception: Record does not exist.</td>
<td>If you are updating records and the import file contains information about a record that does not already exist, an exception occurs. Either remove the information from the import file or mark <strong>Import records not found as new records</strong> on the General tab.</td>
</tr>
<tr>
<td>Exception: Invalid field value: field is Read-Only.</td>
<td>Read-Only fields cannot be updated; therefore, remove the field from the import file. You can remove a Read-Only field on the Fields tab by selecting it and clicking <strong>Remove</strong>. You do not have to remove the field from the import file itself.</td>
</tr>
<tr>
<td>Exception: Record does not exist.</td>
<td>Make sure you are using the correct import ID for that record.</td>
</tr>
<tr>
<td>Exception: Invalid code table entry.</td>
<td>If the import file contains an item not found in the field's table and you did not to mark <strong>Create new table entries</strong> on the General tab, an exception occurs. If you are certain that you want to add a new entry, add the table entry in <strong>Configuration</strong> and then try the import again. To view the table values available for a field, on the Fields tab, select the field in the <strong>Import Field</strong> column, and click <strong>Browse</strong>. The Browse screen appears showing possible values for this field.</td>
</tr>
<tr>
<td>Error message: Bad file name or number.</td>
<td>Check to see if import file is open in another application. If so, close it and try to run the import again.</td>
</tr>
<tr>
<td>Data appears in the wrong fields after import.</td>
<td>Check extensions on the Fields tab.</td>
</tr>
<tr>
<td>Problem</td>
<td>Possible Solution</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Import is complete but no records are added or updated, and you receive no exceptions.</td>
<td>Unmark <strong>Validate Process</strong> on the General tab.</td>
</tr>
<tr>
<td>Import is complete but no records are updated, and you receive no exceptions.</td>
<td>Make sure the file listed in the <strong>Import file</strong> field on the General tab is the updated file, not the export file.</td>
</tr>
<tr>
<td>You have multiple fields in the import file but you want to update only one field.</td>
<td>On the Fields tab, map only the field you want to update. Only mapped fields are updated.</td>
</tr>
<tr>
<td>The import creates duplicate records.</td>
<td>On the General tab, mark <strong>Use duplicate criteria for new records</strong>. The import process checks for duplicates for these record types: applicants, faculty/staff, individuals, organizations, and students. Make sure you have defined duplicate criteria in <strong>Configuration</strong>. You can use the <strong>Search for duplicates</strong> utility in <strong>Administration</strong> to identify any duplicates you created while importing.</td>
</tr>
<tr>
<td>You do not see the import type you need in the tree view on the Import Records page.</td>
<td>Make sure you have security rights for that record type or component. The import types appearing on the Import Records page are those for which you have security rights to view, add, edit, or delete.</td>
</tr>
<tr>
<td>You do not know a record's import ID.</td>
<td>Right-click on the record and select <strong>Properties</strong>. A window appears displaying the import ID and other information about the record.</td>
</tr>
<tr>
<td>Date or currency formatting in *.csv or *.txt files is lost after editing.</td>
<td>Make changes to the import file in Excel and save in *.xls file format. Then save the file again as *.csv or *.txt and import it back into The Education Edge. This preserves the data formatting.</td>
</tr>
<tr>
<td>You want to import a field that has default values.</td>
<td>If you select to use a default set, you do not have to include fields with default values in the import file. Import adds default values automatically to each record in the import file. If you include a field in the import file, but also select to use a default set that includes a value for that field, the value in the import file overrides the default set and is assigned to the imported record. If the field in the import file is blank, then the default set value is used.</td>
</tr>
</tbody>
</table>
**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.

The procedures in this chapter guide you through importing new records for each of the *Admissions Office* import types. These procedures use import files that include the minimum fields required to save the record type plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in these examples but are required by your school’s data entry protocols or your school’s settings in *Configuration*. For more information about identifying required fields, see “Required Fields” on page 13.

Import files must meet these requirements to import successfully:

- The import file must include all required fields. When importing new records, the required fields are all fields required to save that type of record. When updating existing records, the required fields are only those required to identify existing records.
- You must have security rights to all fields and processes involved in the import.

For information about the basics of importing such as setting up and formatting import files, using headers, and identifying required fields, see the Import Basics chapter. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.

## Admissions Office Import Types

The table below lists all import types available in *Admissions Office*.

<table>
<thead>
<tr>
<th>Admissions Office Import Types</th>
<th>Applicant</th>
<th>Faculty/Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant</td>
<td>Applicant, Application, Address, Relationship, Financial Aid, Education, Attributes, Note, Activity</td>
<td>Faculty/Staff, Note, Attributes, Restrictions, Certification, Education, Department, Address, Relationship, Student Restrictions, Available Schools, Conduct, Courses</td>
</tr>
<tr>
<td>Individual</td>
<td>Individual, Attributes, Note, Relationship, Address</td>
<td>Organization, Attributes, Note, Relationship, Address</td>
</tr>
<tr>
<td>Rooms</td>
<td>Room, Attributes, Restrictions</td>
<td>Actions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Action</td>
</tr>
</tbody>
</table>

## Importing Applicants

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.

You can import new applicant records or update existing ones.
Check business rules settings in Configuration before importing new applicants. If the business rule is set to automatically generate new applicant IDs, the program assigns unique applicant IDs to all new applicant records, including those added through Import.

However, unless the Prevent data entry to the applicant ID field checkbox is marked, you can override the program-generated IDs by adding unique, user-defined applicant IDs to the import file. However, if the Prevent data entry to the applicant ID field checkbox is marked, if you add applicant IDs to the import file, you will receive exceptions during the import.

You can also import reciprocal relationships using the applicant relationship component. It is important to ensure that fields in the import file match up with the appropriate record fields so relationships import correctly. The Relation ID field is the record ID for the person or organization who has the relationship with the applicant. The Relationship type field is Personal or Contact. The Relationship field is the type of relationship the relation has with the applicant.

You must use relationships found in the Configuration table unless you mark Create new table entries on the General tab, which we do not recommend because of the risk of creating duplicate entries. The Reciprocal relationship field is the reciprocal relationship the applicant has with the relation. For example, to add a relationship for a applicant and his father, enter the father’s ID for Relation ID, Personal for the Relationship type field, Father for the Relationship field, and Son for the Reciprocal relationship field.

You cannot add a relationship if a record does not already exist for the corresponding relation. For example, you cannot add the father in the previous example as a relation if an individual record does not already exist for the father. In this case, it is easier to add a record for the father manually using the Relationships tab on the son’s record in Records.

When importing multiple relationships, be sure to assign extensions on the Fields tab for each relation. For more information about extensions, see “Extensions” on page 16.

Use the school ID for the School apply and Other School fields.

When importing applicant contacts, you must specify user-defined IDs for the contact’s individual or faculty record.

Required Fields

The import file used in this example includes the minimum fields required to import new students, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in Configuration. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

| Biographical Information Current grade* | In-state resident |
| Biographical Information Last name* | Biographical Information SSN |
| Biographical Information First name | Address General Full address |
| Applications School apply* | Phone Contact type |
| Applications Current status* | Phone Contact number |
### Importing applicants

1. On the Import records page, select the Applicant import type from the tree view.

2. On the action bar, click **New Import**. The Import - Applicant screen appears on the General tab.

   ![Import - Applicant screen](image)

   **Warning:** We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

   **Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.
5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

6. In the **Use [] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

   **Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the **Program Basics Guide**.

7. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

8. In the **Use [] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.

   **Note:** The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with **The Education Edge**.

9. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.
10. Click Next. The File Layout tab appears.

11. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.

   If you select “Other” in the **Field separator** field or “Custom” in the **Text qualifier** field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

12. In the **Import Field Names** frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

   If you mark **Field names are in a separate file**, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

**Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add **Attribute Type** on the Fields tab, you must add **Attribute Description** because it is now required. For more information about required fields, see “Required Fields” on page 13.
13. Click Next. The Fields tab appears. On the Fields tab, you match data in the import file with *Education Edge* record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.

14. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

15. In the **Import Options** frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

16. Mark **Create an output query of the records imported** to save a query of imported records.
17. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

18. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

19. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

20. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

21. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.

22. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View control report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.
23. If you selected to preview the control report on the Options/Summary tab, click Close on the completion screen and the report automatically opens.

24. If you did not select to print or preview the control report, you can see import results by clicking View Control Report on the Import screen. When you finish viewing the report, close the report to return to the import record.

Importing Faculty/Staff

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.

You can import new faculty/staff records or update existing ones.

- Check business rules settings in Configuration before importing new faculty/staff. If the business rule is set to automatically generate new faculty/staff IDs, the program assigns unique faculty/staff IDs to all new faculty/staff records, including those added through Import.

However, unless the Prevent data entry to the faculty/staff ID field checkbox is marked, you can override the program-generated IDs by adding unique, user-defined faculty/staff IDs to the import file. However, if the Prevent data entry to the faculty/staff ID field checkbox is marked, if you add faculty/staff IDs to the import file, you will receive exceptions during the import.

- If a faculty/staff member has more than one position, such as teacher and department chair, use the Department/Position Primary field, Yes as the value, and an extension to designate which position is primary.

- You can also import reciprocal relationships using the faculty/staff relationship component. It is important to ensure that fields in the import file match up with the appropriate record fields so relationships import correctly. The Relation ID field is the record ID for the person or organization who has the relationship with the faculty/staff member. The Relationship type field is Personal or Contact. The Relationship field is the type of relationship the relation has with the faculty/staff.
You must use relationships found in the Configuration table unless you mark Create new table entries on the General tab, which we do not recommend because of the risk of creating duplicate entries. The Reciprocal relationship field is the reciprocal relationship the faculty/staff member has with the relation. For example, to add a relationship for a teacher and his son, enter the son’s ID for Relation ID, Personal for the Relationship type field, Son for the Relationship field, and Father for the Reciprocal relationship field.

You cannot add a relationship if a record does not already exist for the corresponding relation. For example, you cannot add the son in the previous example as a relation if a student/applicant/individual record does not already exist for the son. In this case, it is easier to add a record for the son manually using the Relationships tab on the teacher’s record in Records.

- When importing multiple relationships, be sure to assign extensions on the Fields tab for each relation. For more information about extensions, see “Extensions” on page 16.
- Use the school ID for the School field.

**Required Fields**

The import file used in this example includes the minimum fields required to import new faculty/staff, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in Configuration. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

- Biographical Information Last name*
- Address General Full address
- Biographical Information First name
- Phone Contact type
- Biographical Information Gender
- Phone Contact number
- Biographical Information SSN
- Department/Position Department
- Biographical Information Birth date
- Department/Position Position
- Biographical Information Affiliation
- Department/Position Primary

**Importing faculty/staff members**

1. On the Import records page, select the Faculty/Staff import type from the tree view.
2. On the action bar, click **New Import**. The Import - Faculty/Staff screen appears on the General tab.

![Import - Faculty/Staff screen](image)

**Warning:** We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

**Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

**Note:** To check for duplicate criteria when importing, you must define duplicate criteria in **Configuration**. For information about defining duplicate criteria, see the **Configuration Guide for Admissions Office**.

6. Mark **Use duplicate criteria for new records** to prevent creating duplicate records during the import. If the program finds duplicates in the import file, they are processed as exceptions and not imported into the database.

7. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the **Program Basics Guide**.
8. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

9. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.

**Note:** The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with *The Education Edge*.

10. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

11. Click **Next**. The File Layout tab appears.

12. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.
If you select “Other” in the Field separator field or “Custom” in the Text qualifier field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

13. In the Import Field Names frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

If you mark Field names are in a separate file, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

**Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add Attribute Type on the Fields tab, you must add Attribute Description because it is now required. For more information about required fields, see “Required Fields” on page 13.

15. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

16. In the **Import Options** frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

17. Mark **Create an output query of the records imported** to save a query of imported records.

18. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

19. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

20. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

21. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

22. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.
23. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View control report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.

24. If you selected to preview the control report on the Options/Summary tab, click **Close** on the completion screen and the report automatically opens.

25. If you did not select to print or preview the control report, you can see import results by clicking **View Control Report** on the Import screen. When you finish viewing the report, close the report to return to the import record.

### Importing Individuals

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.
You can import new individuals or update existing ones.

- Check business rules settings in Configuration before importing new individuals. If the business rule is set to automatically generate new individual IDs, the program assigns unique individual IDs to all new individual records, including those added through Import.

However, unless the Prevent data entry to the individual ID field checkbox is marked, you can override the program-generated IDs by adding unique, user-defined individual IDs to the import file. However, if the Prevent data entry to the individual ID field checkbox is marked, if you add individual IDs to the import file, you will receive exceptions during the import.

- You can also import reciprocal relationships using the individual relationship component. It is important to ensure that fields in the import file match up with the appropriate record fields so relationships import correctly. The Relation ID field is the record ID for the person or organization who has the relationship with the individual. The Relationship type field is Personal or Contact. The Relationship field is the type of relationship the relation has with the individual.

You must use relationships found in the Configuration table unless you mark Create new table entries on the General tab, which we do not recommend because of the risk of creating duplicate entries. The Reciprocal relationship field is the reciprocal relationship the individual has with the relation. For example, to add a relationship for a individual and his father, enter the father’s ID for Relation ID, Personal for the Relationship type field, Father for the Relationship field, and Son for the Reciprocal relationship field.

You cannot add a relationship if a record does not already exist for the corresponding relation. For example, you cannot add the father in the previous example as a relation if an individual record does not already exist for the father. In this case, it is easier to add a record for the father manually using the Relationships tab on the son’s record in Records.

- When importing multiple relationships, be sure to assign extensions on the Fields tab for each relation. For more information about extensions, see “Extensions” on page 16.

- Use the school ID for the School field.

Required Fields

The import file used in this example includes the minimum fields required to import new individuals, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in Configuration. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

- Biographical Information Last name
- Address General Full address
- Biographical Information First name
- Phone Contact type
- Biographical Information Affiliation
- Phone Contact number
Importing individuals

1. On the Import records page, select the Individual import type from the tree view.

2. On the action bar, click **New Import**. The Import - Individual screen appears on the General tab.

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

   **Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.
6. Mark Use duplicate criteria for new records to prevent creating duplicate records during the import. If the program finds duplicates in the import file, they are processed as exceptions and not imported into the database.

7. In the Use [...] when importing table entries field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

8. In the Import file field, enter the path of the data file to import or click the ellipsis to browse to the file.

9. In the Use [...] to match records in the import file with existing records field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.

10. In the What is the format of this import file? frame, mark Delimited. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

Tip: You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the Program Basics Guide.

Note: The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with The Education Edge.

Note: To check for duplicate criteria when importing, you must define duplicate criteria in Configuration. For information about defining duplicate criteria, see the Configuration Guide for Admissions Office.
11. Click **Next**. The File Layout tab appears.

12. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.

   If you select “Other” in the **Field separator** field or “Custom” in the **Text qualifier** field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

13. In the **Import Field Names** frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

   If you mark **Field names are in a separate file**, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

**Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add **Attribute Type** on the Fields tab, you must add **Attribute Description** because it is now required. For more information about required fields, see “Required Fields” on page 13.

![Image of the Fields tab in the Import - Individual module]

15. When you have finished setting all fields, click Next. The Options/Summary tab appears.

![Image of the Options/Summary tab in the Import - Individual module]

16. In the Import Options frame, mark Create exception file of records not updated/imported to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the Program Basics Guide.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

17. Mark Create an output query of the records imported to save a query of imported records.
18. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

19. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

20. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

21. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

22. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.

23. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View control report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.
24. If you selected to preview the control report on the Options/Summary tab, click Close on the completion screen and the report automatically opens.

25. If you did not select to print or preview the control report, you can see import results by clicking View Control Report on the Import screen. When you finish viewing the report, close the report to return to the import record.

Importing Organizations

Warning: We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.

You can import new organizations or update existing ones.

- Check business rules settings in Configuration before importing new organizations. If the business rule is set to automatically generate new organization IDs, the program assigns unique organization IDs to all new organization records, including those added through Import.

However, unless the Prevent data entry to the organization ID field checkbox is marked, you can override the program-generated IDs by adding unique, user-defined organization IDs to the import file. However, if the Prevent data entry to the organization ID field checkbox is marked, if you add organization IDs to the import file, you will receive exceptions during the import.

- You can also import reciprocal relationships using the organization relationship component. It is important to ensure that fields in the import file match up with the appropriate record fields so relationships import correctly. The Relation ID field is the record ID for the person or organization who has the relationship with the organization. The Relationship type field is Personal or Contact. The Relationship field is the type of relationship the relation has with the organization.

You must use relationships found in the Configuration table unless you mark Create new table entries on the General tab, which we do not recommend because of the risk of creating duplicate entries. The Reciprocal relationship field is the reciprocal relationship the organization has with the relation. For example, to add a relationship for an organization and an individual, enter the individual’s ID for Relation ID, Contact for the Relationship type field, Primary Contact for the Relationship field, and Employer for the Reciprocal relationship field.
You cannot add a relationship if a record does not already exist for the corresponding relation. For example, you cannot add the primary contact in the previous example as a relation if an individual record does not already exist for the contact. In this case, it is easier to add a record for the contact manually using the Relationships tab on the organization’s record in Records.

- When importing multiple relationships, be sure to assign extensions on the Fields tab for each relation. For more information about extensions, see “Extensions” on page 16.

Required Fields

The import file used in this example includes the minimum fields required to import new organizations, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in Configuration. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

<table>
<thead>
<tr>
<th>Name*</th>
<th>GPA scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Information Name*</td>
<td>Address Options Description</td>
</tr>
<tr>
<td>Classification</td>
<td>Full Address</td>
</tr>
<tr>
<td>Type</td>
<td>Address Options Primary address</td>
</tr>
</tbody>
</table>

Importing organizations

1. On the Import records page, select the Organization import type from the tree view.
2. On the action bar, click **New Import**. The Import - Organization screen appears on the General tab.

   ![Import - Organization screen](image)

   **Warning:** We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

**Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

   **Note:** To check for duplicate criteria when importing, you must define duplicate criteria in **Configuration**. For information about defining duplicate criteria, see the **Configuration Guide for Admissions Office**.

6. Mark **Use duplicate criteria for new records** to prevent creating duplicate records during the import. If the program finds duplicates in the import file, they are processed as exceptions and not imported into the database.

7. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the **Program Basics Guide**.
8. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

9. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.

**Note:** The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with *The Education Edge*.

10. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

11. Click **Next**. The **File Layout** tab appears.

12. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.
If you select “Other” in the **Field separator** field or “Custom” in the **Text qualifier** field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

13. In the **Import Field Names** frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

If you mark **Field names are in a separate file**, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

**Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add **Attribute Type** on the Fields tab, you must add **Attribute Description** because it is now required. For more information about required fields, see “Required Fields” on page 13.

14. Click **Next**. The Fields tab appears. On the Fields tab, you match data in the import file with **Education Edge** record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.
15. When you have finished setting all fields, click Next. The Options/Summary tab appears.

16. In the Import Options frame, mark Create exception file of records not updated/imported to create a file of all fields that do not import successfully.

Tip: You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the Program Basics Guide.

   In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

17. Mark Create an output query of the records imported to save a query of imported records.

18. Mark Create control report to view or print a report listing the import results, criteria, field mappings, and exceptions.

Warning: If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

   If you create a control report, mark Preview to view the report on your screen or mark Print to print the report.

19. Review information in the Import Summary Information frame. If you are satisfied with the set parameters, click Import Now.

20. The program asks if you want to save changes. To save, click Yes. If this is the first time you have saved the import record, the Save Import As screen appears.

Note: You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

21. In the Name field, enter a name for the import. In the Description field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click Save.

22. If you marked Create an output query of the records imported on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click Save.
23. Once the program begins processing the import, a progress bar appears. If you click Cancel, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click Exit Import, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click View control report, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.

24. If you selected to preview the control report on the Options/Summary tab, click Close on the completion screen and the report automatically opens.

25. If you did not select to print or preview the control report, you can see import results by clicking View Control Report on the Import screen. When you finish viewing the report, close the report to return to the import record.

Importing Rooms

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.
You can import new rooms or update existing ones.

- You must include the **Restrict by** field with “Not available for scheduling during these days and times” as the value to import the **Unavailable from** and **Unavailable to** fields.
- Use the school ID for the **School** field.

**Required Fields**

The import file used in this example includes the minimum fields required to import new rooms, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in **Configuration**. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Room ID*</td>
<td>Maximum capacity</td>
</tr>
<tr>
<td>Description</td>
<td>Has target capacity</td>
</tr>
<tr>
<td>Room type</td>
<td>Target capacity</td>
</tr>
<tr>
<td>Has maximum capacity</td>
<td></td>
</tr>
</tbody>
</table>

- **Importing rooms**
  1. On the Import records page, select the Rooms import type from the tree view.
2. On the action bar, click **New Import**. The Import - Rooms screen appears on the General tab.

![Import - Rooms screen](image)

**Warning:** We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

**Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

6. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

7. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

8. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.
9. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

![Import - Room](image)

10. Click **Next**. The File Layout tab appears.

![Import - Room](image)

11. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.

If you select “Other” in the **Field separator** field or “Custom” in the **Text qualifier** field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

![Import - Room](image)
12. In the **Import Field Names** frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

If you mark **Field names are in a separate file**, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

**Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add **Attribute Type** on the Fields tab, you must add **Attribute Description** because it is now required. For more information about required fields, see “Required Fields” on page 13.

13. Click **Next**. The Fields tab appears. On the Fields tab, you match data in the import file with **Education Edge** record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.
14. When you have finished setting all fields, click Next. The Options/Summary tab appears.

![Import Options and Import Summary Information frames]

15. In the Import Options frame, mark Create exception file of records not updated/imported to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the Program Basics Guide.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

16. Mark Create an output query of the records imported to save a query of imported records.

17. Mark Create control report to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark Preview to view the report on your screen or mark Print to print the report.

18. Review information in the Import Summary Information frame. If you are satisfied with the set parameters, click Import Now.

19. The program asks if you want to save changes. To save, click Yes. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

20. In the Name field, enter a name for the import. In the Description field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click Save.

21. If you marked Create an output query of the records imported on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click Save.
22. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View control report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.

![Completion Screen](image)

23. If you selected to preview the control report on the Options/Summary tab, click **Close** on the completion screen and the report automatically opens.

![Control Report](image)

24. If you did not select to print or preview the control report, you can see import results by clicking **View Control Report** on the Import screen. When you finish viewing the report, close the report to return to the import record.

**Importing Actions**

*Warning:* We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.
You can import new action records or update existing ones.

- Use the record ID for the **Action for ID** field. For example, if you are assigning the action to a student, use the student’s record ID.

- For the **Action for record type** field, use the record type for which you are importing the action. For example, if you are assigning the action to a student, use Student for this field.

### Required Fields

The import file used in this example includes the minimum fields required to import new students, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in *Configuration*. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

- Action for ID*
- Action type*
- Start date*
- Action for record type*

### Importing actions

1. On the Import records page, select the Action import type from the tree view.

3. In the What do you want to do? frame, mark Import new records.

4. To validate the import file before actually adding records, mark Validate data only. When you later click Validate Now, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark Validate data only.

Note: We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark Create new table entries in the Options frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

If you select Create new table entries when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

6. In the Use [ ] when importing table entries field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

Tip: You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the Program Basics Guide.

7. In the Import file field, enter the path of the data file to import or click the ellipsis to browse to the file.

8. In the Use [ ] to match records in the import file with existing records field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.
Note: The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with The Education Edge.

9. In the What is the format of this import file? frame, mark Delimited. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

10. Click Next. The File Layout tab appears.

11. In the Field Separators and Text Qualifiers frame, select the field separators and text qualifiers used in the import file.

   If you select “Other” in the Field separator field or “Custom” in the Text qualifier field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “:” not “period”.
12. In the **Import Field Names** frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

If you mark **Field names are in a separate file**, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

**Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add **Attribute Type** on the Fields tab, you must add **Attribute Description** because it is now required. For more information about required fields, see “Required Fields” on page 13.

13. Click **Next**. The Fields tab appears. On the Fields tab, you match data in the import file with **Education Edge** record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.

14. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.
15. In the **Import Options** frame, mark *Create exception file of records not updated/imported* to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

16. Mark *Create an output query of the records imported* to save a query of imported records.

17. Mark *Create control report* to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark *Preview* to view the report on your screen or mark *Print* to print the report.

18. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click *Import Now*.

19. The program asks if you want to save changes. To save, click *Yes*. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

20. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click *Save*.

21. If you marked *Create an output query of the records imported* on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click *Save*.

22. Once the program begins processing the import, a progress bar appears. If you click *Cancel*, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click *Exit Import*, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click *View control report*, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.
23. If you selected to preview the control report on the Options/Summary tab, click **Close** on the completion screen and the report automatically opens.

24. If you did not select to print or preview the control report, you can see import results by clicking **View Control Report** on the Import screen. When you finish viewing the report, close the report to return to the import record.
Registrar’s Office Imports

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Note: We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.

The procedures in this chapter guide you through importing new records for each of the Registrar's Office import types. These procedures use import files that include the minimum fields required to save the record type plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in these examples but are required by your school’s data entry protocols or your school’s settings in Configuration. For more information about identifying required fields, see “Required Fields” on page 13.

Import files must meet these requirements to import successfully:

- The import file must include all required fields. When importing new records, the required fields are all fields required to save that type of record. When updating existing records, the required fields are only those required to identify existing records.
- You must have security rights to all fields and processes involved in the import.

For information about the basics of importing such as setting up and formatting import files, using headers, and identifying required fields, see the Import Basics chapter. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.

Registrar's Office Import Types

The table below lists all import types available in Registrar's Office.

<table>
<thead>
<tr>
<th>Registrar's Office Import Types</th>
<th>Faculty/Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student</td>
<td>Faculty/Staff, Note, Attributes, Restrictions, Certification, Education, Department, Relationship, Student Restrictions, Available Schools, Conduct, Courses</td>
</tr>
<tr>
<td>Individual</td>
<td>Organization, Attributes, Note, Relationship</td>
</tr>
<tr>
<td>Rooms</td>
<td>Courses, Course, Restriction, Available Teachers, Available Rooms, Grading Information, Billing, Attributes</td>
</tr>
<tr>
<td>Class</td>
<td>Actions, Action</td>
</tr>
<tr>
<td>Grades</td>
<td>GPA, GPA</td>
</tr>
<tr>
<td>Performance</td>
<td>Ranking, Rank</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rooms</th>
<th>Classes, Attributes, Restrictions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Class</td>
<td>Grades, Grade</td>
</tr>
<tr>
<td>Performance</td>
<td>GPA, GPA, Ranking</td>
</tr>
</tbody>
</table>

Note: We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.
Importing Students

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.

You can import new student records or update existing ones.

- Check business rules settings in *Configuration* before importing new students. If the business rule is set to automatically generate new student IDs, the program assigns unique student IDs to all new student records, including those added through Import.
  
  However, unless the **Prevent data entry to the student ID field** checkbox is marked, you can override the program-generated IDs by adding unique, user-defined student IDs to the import file. However, if the **Prevent data entry to the student ID field** checkbox is marked, if you add student IDs to the import file, you will receive exceptions during the import.

- You can also import reciprocal relationships using the student relationship component. It is important to ensure that fields in the import file match up with the appropriate record fields so relationships import correctly. The **Relation ID** field is the record ID for the person or organization who has the relationship with the student. The **Relationship type** field is Personal or Contact. The **Relationship** field is the type of relationship the relation has with the student.

  You must use relationships found in the *Configuration* table unless you mark **Create new table entries** on the General tab, which we do not recommend because of the risk of creating duplicate entries. The **Reciprocal relationship** field is the reciprocal relationship the student has with the relation. For example, to add a relationship for a student and his father, enter the father’s ID for **Relation ID**, Personal for the **Relationship type** field, Father for the **Relationship** field, and Son for the **Reciprocal relationship** field.

  You cannot add a relationship if a record does not already exist for the corresponding relation. For example, you cannot add the father in the previous example as a relation if an individual record does not already exist for the father. In this case, it is easier to add a record for the father manually using the Relationships tab on the son’s record in *Records*.

- When importing multiple relationships, be sure to assign extensions on the Fields tab for each relation. For more information about extensions, see “Extensions” on page 16.

- Use the school ID for the **School** and **Student Enrollment School** fields.

- When importing student contacts, you must specify user-defined IDs for the contact’s individual or faculty record.

- If you have **Admissions Office** and import students who are also current applicants, run the Mark for Reenrollment wizard in *Administration* to add the applicant view to those students.

- When importing student progression entries, be careful to enter consistent values for the **Homeroom Teacher** and **Homeroom** fields. When homeroom values do not match, the program imports the value for whichever field appears last in the import file and imports a blank value for the other field. For example, if you include the **Homeroom Teacher** and **Homeroom** fields (in that order in the import file) and the room number does not match the one defined on the homeroom teacher’s record, the room number imports to the **Homeroom** field on the student record, but the **Homeroom Teacher** field is blank.

**Required Fields**

The import file used in this example includes the minimum fields required to import new students, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in *Configuration*. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.
1. On the Import records page, select the Student import type from the tree view.

2. On the action bar, click New Import. The Import - Student screen appears on the General tab.

Warning: We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the What do you want to do? frame, mark Import new records.
4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

**Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

6. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the **Program Basics Guide**.

7. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

8. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.

**Note:** The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with **The Education Edge**.

9. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.
10. Click **Next**. The File Layout tab appears.

11. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.

   If you select “Other” in the **Field separator** field or “Custom” in the **Text qualifier** field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

12. In the **Import Field Names** frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

   If you mark **Field names are in a separate file**, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

   **Warning**: When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add **Attribute Type** on the Fields tab, you must add **Attribute Description** because it is now required. For more information about required fields, see “Required Fields” on page 13.
13. Click Next. The Fields tab appears. On the Fields tab, you match data in the import file with *Education Edge* record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.

14. When you have finished setting all fields, click Next. The Options/Summary tab appears.

15. In the Import Options frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

16. Mark **Create an output query of the records imported** to save a query of imported records.
17. Mark Create control report to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning**: If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark Preview to view the report on your screen or mark Print to print the report.

18. Review information in the Import Summary Information frame. If you are satisfied with the set parameters, click Import Now.

19. The program asks if you want to save changes. To save, click Yes. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note**: You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

20. In the Name field, enter a name for the import. In the Description field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click Save.

21. If you marked Create an output query of the records imported on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click Save.

22. Once the program begins processing the import, a progress bar appears. If you click Cancel, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click Exit Import, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click View control report, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.
23. If you selected to preview the control report on the Options/Summary tab, click Close on the completion screen and the report automatically opens.

24. If you did not select to print or preview the control report, you can see import results by clicking View Control Report on the Import screen. When you finish viewing the report, close the report to return to the import record.

**Importing Faculty/Staff**

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.

You can import new faculty/staff records or update existing ones.

- Check business rules settings in Configuration before importing new faculty/staff. If the business rule is set to automatically generate new faculty/staff IDs, the program assigns unique faculty/staff IDs to all new faculty/staff records, including those added through import.

  However, unless the Prevent data entry to the faculty/staff ID field checkbox is marked, you can override the program-generated IDs by adding unique, user-defined faculty/staff IDs to the import file. However, if the Prevent data entry to the faculty/staff ID field checkbox is marked, if you add faculty/staff IDs to the import file, you will receive exceptions during the import.

- If a faculty/staff member has more than one position, such as teacher and department chair, use the Department/Position Primary field, Yes as the value, and an extension to designate which position is primary.

- You can also import reciprocal relationships using the faculty/staff relationship component. It is important to ensure that fields in the import file match up with the appropriate record fields so relationships import correctly. The Relation ID field is the record ID for the person or organization who has the relationship with the faculty/staff member. The Relationship type field is Personal or Contact. The Relationship field is the type of relationship the relation has with the faculty/staff.
You must use relationships found in the Configuration table unless you mark Create new table entries on the General tab, which we do not recommend because of the risk of creating duplicate entries. The Reciprocal relationship field is the reciprocal relationship the faculty/staff member has with the relation. For example, to add a relationship for a teacher and his son, enter the son’s ID for Relation ID, Personal for the Relationship type field, Son for the Relationship field, and Father for the Reciprocal relationship field.

You cannot add a relationship if a record does not already exist for the corresponding relation. For example, you cannot add the son in the previous example as a relation if a student/applicant/individual record does not already exist for the son. In this case, it is easier to add a record for the son manually using the Relationships tab on the teacher’s record in Records.

- When importing multiple relationships, be sure to assign extensions on the Fields tab for each relation. For more information about extensions, see “Extensions” on page 16.
- Use the school ID for the School field.

### Required Fields

The import file used in this example includes the minimum fields required to import new faculty/staff, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in Configuration. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

- Biographical Information Last name* Address General Full address
- Biographical Information First name Phone Contact type
- Biographical Information Gender Phone Contact number
- Biographical Information SSN Department/Position Department
- Biographical Information Birth date Department/Position Position
- Biographical Information Affiliation Department/Position Primary

### Importing faculty/staff members

1. On the Import records page, select the Faculty/Staff import type from the tree view.
2. On the action bar, click **New Import**. The Import - Faculty/Staff screen appears on the General tab.

   ![Image of the Import - Faculty/Staff screen]

**Warning:** We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

**Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

**Note:** To check for duplicate criteria when importing, you must define duplicate criteria in **Configuration**. For information about defining duplicate criteria, see the **Configuration Guide for Registrar’s Office**.

6. Mark **Use duplicate criteria for new records** to prevent creating duplicate records during the import. If the program finds duplicates in the import file, they are processed as exceptions and not imported into the database.

7. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the **Program Basics Guide**.
8. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

9. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.

**Note:** The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with *The Education Edge*.

10. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

11. Click **Next**. The File Layout tab appears.

12. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.
If you select “Other” in the Field separator field or “Custom” in the Text qualifier field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

13. In the Import Field Names frame, mark the option Designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

If you mark Field names are in a separate file, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

**Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add Attribute Type on the Fields tab, you must add Attribute Description because it is now required. For more information about required fields, see “Required Fields” on page 13.

15. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

16. In the **Import Options** frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

   **Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

   In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

17. Mark **Create an output query of the records imported** to save a query of imported records.

18. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions.

   **Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

   If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

19. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

20. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

   **Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

21. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

22. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.
23. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View control report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.

24. If you selected to preview the control report on the Options/Summary tab, click **Close** on the completion screen and the report automatically opens.

25. If you did not select to print or preview the control report, you can see import results by clicking **View Control Report** on the Import screen. When you finish viewing the report, close the report to return to the import record.

## Importing Individuals

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.
You can import new individuals or update existing ones.

- Check business rules settings in Configuration before importing new individuals. If the business rule is set to automatically generate new individual IDs, the program assigns unique individual IDs to all new individual records, including those added through Import.

  However, unless the Prevent data entry to the individual ID field checkbox is marked, you can override the program-generated IDs by adding unique, user-defined individual IDs to the import file. However, if the Prevent data entry to the individual ID field checkbox is marked, if you add individual IDs to the import file, you will receive exceptions during the import.

- You can also import reciprocal relationships using the individual relationship component. It is important to ensure that fields in the import file match up with the appropriate record fields so relationships import correctly. The Relation ID field is the record ID for the person or organization who has the relationship with the individual. The Relationship type field is Personal or Contact. The Relationship field is the type of relationship the relation has with the individual.

  You must use relationships found in the Configuration table unless you mark Create new table entries on the General tab, which we do not recommend because of the risk of creating duplicate entries. The Reciprocal relationship field is the reciprocal relationship the individual has with the relation. For example, to add a relationship for a individual and his father, enter the father’s ID for Relation ID, Personal for the Relationship type field, Father for the Relationship field, and Son for the Reciprocal relationship field.

  You cannot add a relationship if a record does not already exist for the corresponding relation. For example, you cannot add the father in the previous example as a relation if an individual record does not already exist for the father. In this case, it is easier to add a record for the father manually using the Relationships tab on the son’s record in Records.

- When importing multiple relationships, be sure to assign extensions on the Fields tab for each relation. For more information about extensions, see “Extensions” on page 16.

- Use the school ID for the School field.

**Required Fields**

The import file used in this example includes the minimum fields required to import new individuals, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in Configuration. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

<table>
<thead>
<tr>
<th>Biographical Information Last name*</th>
<th>Address General Full address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biographical Information First name</td>
<td>Phone Contact type</td>
</tr>
<tr>
<td>Biographical Information Affiliation</td>
<td>Phone Contact number</td>
</tr>
</tbody>
</table>
Importing individuals

1. On the Import records page, select the Individual import type from the tree view.

2. On the action bar, click New Import. The Import - Individual screen appears on the General tab.

3. In the What do you want to do? frame, mark Import new records.

4. To validate the import file before actually adding records, mark Validate data only. When you later click Validate Now, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark Validate data only.

Note: We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark Create new table entries in the Options frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

If you select Create new table entries when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.
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6. Mark **Use duplicate criteria for new records** to prevent creating duplicate records during the import. If the program finds duplicates in the import file, they are processed as exceptions and not imported into the database.

7. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

8. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

9. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.

**Note:** The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with *The Education Edge*.

10. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.
11. Click Next. The File Layout tab appears.

12. In the Field Separators and Text Qualifiers frame, select the field separators and text qualifiers used in the import file.
   If you select “Other” in the Field separator field or “Custom” in the Text qualifier field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

13. In the Import Field Names frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.
   If you mark Field names are in a separate file, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

Warning: When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add Attribute Type on the Fields tab, you must add Attribute Description because it is now required. For more information about required fields, see “Required Fields” on page 13.
14. Click **Next**. The Fields tab appears. On the Fields tab, you match data in the import file with *Education Edge* record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.

15. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

16. In the **Import Options** frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

17. Mark **Create an output query of the records imported** to save a query of imported records.
18. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

19. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

20. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

21. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

22. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.

23. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View control report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.
24. If you selected to preview the control report on the Options/Summary tab, click Close on the completion screen and the report automatically opens.

25. If you did not select to print or preview the control report, you can see import results by clicking View Control Report on the Import screen. When you finish viewing the report, close the report to return to the import record.

**Importing Organizations**

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.

You can import new organizations or update existing ones.

- Check business rules settings in Configuration before importing new organizations. If the business rule is set to automatically generate new organization IDs, the program assigns unique organization IDs to all new organization records, including those added through Import.

  However, unless the Prevent data entry to the organization ID field checkbox is marked, you can override the program-generated IDs by adding unique, user-defined organization IDs to the import file. However, if the Prevent data entry to the organization ID field checkbox is marked, if you add organization IDs to the import file, you will receive exceptions during the import.

- You can also import reciprocal relationships using the organization relationship component. It is important to ensure that fields in the import file match up with the appropriate record fields so relationships import correctly. The Relation ID field is the record ID for the person or organization who has the relationship with the organization. The Relationship type field is Personal or Contact. The Relationship field is the type of relationship the relation has with the organization.

  You must use relationships found in the Configuration table unless you mark Create new table entries on the General tab, which we do not recommend because of the risk of creating duplicate entries. The Reciprocal relationship field is the reciprocal relationship the organization has with the relation. For example, to add a relationship for an organization and an individual, enter the individual's ID for Relation ID, Contact for the Relationship type field, Primary Contact for the Relationship field, and Employer for the Reciprocal relationship field.
You cannot add a relationship if a record does not already exist for the corresponding relation. For example, you cannot add the primary contact in the previous example as a relation if an individual record does not already exist for the contact. In this case, it is easier to add a record for the contact manually using the Relationships tab on the organization's record in Records.

• When importing multiple relationships, be sure to assign extensions on the Fields tab for each relation. For more information about extensions, see “Extensions” on page 16.

**Required Fields**

The import file used in this example includes the minimum fields required to import new organizations, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in Configuration. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

- Name*
- GPA scale
- Organization Information Name*
- Address Options Description
- Classification
- Full Address
- Type
- Address Options
- Primary address

**Importing organizations**

1. On the Import records page, select the Organization import type from the tree view.
2. On the action bar, click **New Import**. The Import - Organization screen appears on the General tab.

![Import - Organization screen](image)

**Warning**: We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

**Note**: We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

**Note**: To check for duplicate criteria when importing, you must define duplicate criteria in **Configuration**. For information about defining duplicate criteria, see the **Configuration Guide for Registrar's Office**.

6. Mark **Use duplicate criteria for new records** to prevent creating duplicate records during the import. If the program finds duplicates in the import file, they are processed as exceptions and not imported into the database.

7. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip**: You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the **Program Basics Guide**.
8. In the Import file field, enter the path of the data file to import or click the ellipsis to browse to the file.

9. In the Use [ ] to match records in the import file with existing records field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.

**Note:** The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with *The Education Edge*.

10. In the What is the format of this import file? frame, mark Delimited. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

11. Click Next. The File Layout tab appears.

12. In the Field Separators and Text Qualifiers frame, select the field separators and text qualifiers used in the import file.
If you select “Other” in the **Field separator** field or “Custom” in the **Text qualifier** field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

13. In the **Import Field Names** frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

If you mark **Field names are in a separate file**, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

**Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add **Attribute Type** on the Fields tab, you must add **Attribute Description** because it is now required. For more information about required fields, see “Required Fields” on page 13.

14. Click **Next**. The Fields tab appears. On the Fields tab, you match data in the import file with **Education Edge** record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.
15. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

16. In the **Import Options** frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

17. Mark **Create an output query of the records imported** to save a query of imported records.

18. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

19. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

20. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

21. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

22. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.
23. Once the program begins processing the import, a progress bar appears. If you click Cancel, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click Exit Import, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click View control report, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.

24. If you selected to preview the control report on the Options/Summary tab, click Close on the completion screen and the report automatically opens.

25. If you did not select to print or preview the control report, you can see import results by clicking View Control Report on the Import screen. When you finish viewing the report, close the report to return to the import record.

Importing Rooms

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.
You can import new rooms or update existing ones.

- You must include the **Restrict by** field with "Not available for scheduling during these days and times" as the value to import the **Unavailable from** and **Unavailable to** fields.
- Use the school ID for the **School** field.

**Required Fields**

The import file used in this example includes the minimum fields required to import new rooms, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in **Configuration**. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

- **Room ID**
- **Maximum capacity**
- **Description**
- **Has target capacity**
- **Room type**
- **Target capacity**
- **Has maximum capacity**

**Importing rooms**

1. On the Import records page, select the Rooms import type from the tree view.
2. On the action bar, click New Import. The Import - Rooms screen appears on the General tab.

![Image of the Import - Rooms screen]

**Warning:** We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the What do you want to do? frame, mark Import new records.

4. To validate the import file before actually adding records, mark Validate data only. When you later click Validate Now, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark Validate data only.

**Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark Create new table entries in the Options frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select Create new table entries when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

6. In the Use [ ] when importing table entries field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the Program Basics Guide.

7. In the Import file field, enter the path of the data file to import or click the ellipsis to browse to the file.

8. In the Use [ ] to match records in the import file with existing records field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.
9. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

   ![Image of the import process](image)

10. Click **Next**. The File Layout tab appears.

11. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.

   If you select “Other” in the **Field separator** field or “Custom” in the **Text qualifier** field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

   ![Image of the File Layout tab](image)
12. In the Import Field Names frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

If you mark Field names are in a separate file, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

**Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add Attribute Type on the Fields tab, you must add Attribute Description because it is now required. For more information about required fields, see “Required Fields” on page 13.

13. Click Next. The Fields tab appears. On the Fields tab, you match data in the import file with Education Edge record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.
14. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

15. In the **Import Options** frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

16. Mark **Create an output query of the records imported** to save a query of imported records.

17. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

18. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

19. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

20. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

21. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.
22. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View control report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.

23. If you selected to preview the control report on the Options/Summary tab, click **Close** on the completion screen and the report automatically opens.

24. If you did not select to print or preview the control report, you can see import results by clicking **View Control Report** on the Import screen. When you finish viewing the report, close the report to return to the import record.

### Importing Courses

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.
You can import new courses or update existing ones.

- When importing more than one grade level for the course, be sure to assign extensions on the Fields tab for each grade level. For more information about extensions, see “Extensions” on page 16.
- When importing scheduling rules for courses, the Course A field imports to the first Course column on Rules tab and the Course B field imports to the second Course column.
- When importing course restrictions, the pattern included must be valid for the selected academic year and session.
- Use the school ID for the School field.

**Required Fields**

The import file used in this example includes the minimum fields required to import new courses, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in Configuration. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

<table>
<thead>
<tr>
<th>Course ID*</th>
<th>Grade Levels Grade level*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course name*</td>
<td>Restrictions Academic Year</td>
</tr>
<tr>
<td>School*</td>
<td>Restrictions Session</td>
</tr>
<tr>
<td>Course category*</td>
<td>Restrictions Length in terms</td>
</tr>
<tr>
<td>Target class size*</td>
<td>Restrictions Pattern</td>
</tr>
<tr>
<td>Target classes per term*</td>
<td></td>
</tr>
</tbody>
</table>

**Importing courses**

1. On the Import records page, select the Course import type from the tree view.
2. On the action bar, click **New Import**. The Import - Course screen appears on the General tab.

![Import - Course screen](image)

**Warning:** We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

**Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

**Note:** To check for duplicate criteria when importing, you must define duplicate criteria in **Configuration**. For information about defining duplicate criteria, see the **Configuration Guide for Registrar’s Office**.

6. Mark **Use duplicate criteria for new records** to prevent creating duplicate records during the import. If the program finds duplicates in the import file, they are processed as exceptions and not imported into the database.

7. In the **Use [...] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the **Program Basics Guide**.
8. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

9. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.

**Note:** The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with *The Education Edge*.

10. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

11. Click **Next**. The File Layout tab appears.

12. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.
If you select “Other” in the Field separator field or “Custom” in the Text qualifier field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

13. In the Import Field Names frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

If you mark Field names are in a separate file, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

**Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add Attribute Type on the Fields tab, you must add Attribute Description because it is now required. For more information about required fields, see “Required Fields” on page 13.

15. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

![Import Options](image)

16. In the **Import Options** frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

17. Mark **Create an output query of the records imported** to save a query of imported records.

18. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

19. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

20. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

21. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

22. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.
23. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View control report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.

24. If you selected to preview the control report on the Options/Summary tab, click **Close** on the completion screen and the report automatically opens.

25. If you did not select to print or preview the control report, you can see import results by clicking **View Control Report** on the Import screen. When you finish viewing the report, close the report to return to the import record.

### Importing Classes

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.
You can import new classes or update existing ones. You cannot import new classes for a course that is on hold or inactive.

- The **Start term** field value must be the start term assigned on the course record.
- Use the school ID for the **School** field.
- Use the course ID for the **Course** field.

**Required Fields**

The import file used in this example includes the minimum fields required to import new classes, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in **Configuration**. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

- **Course**
- **Session**
- **School**
- **Start term**
- **Academic year**

**Importing classes**

1. On the Import records page, select the Classes import type from the tree view.
2. On the action bar, click **New Import**. The Import - Classes screen appears on the General tab.

   ![Import - Classes screen](image)

   **Warning**: We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

   **Note**: We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

   **Note**: To check for duplicate criteria when importing, you must define duplicate criteria in **Configuration**. For information about defining duplicate criteria, see the **Configuration Guide for Registrar’s Office**.

6. Mark **Use duplicate criteria for new records** to prevent creating duplicate records during the import. If the program finds duplicates in the import file, they are processed as exceptions and not imported into the database.

7. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Mapping Fields on the Fields Tab” on page 28.

   **Tip**: You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the **Program Basics Guide**.

8. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.
9. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.

**Note:** The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with *The Education Edge*.

10. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

11. Click **Next**. The File Layout tab appears.

```
  File Layout

What do you want to do?
  - Import new records
  - Update existing records
  - Create import file
  - Export records

What file do you want to import?

   [ ] File ImportPath: Import\Classes\importClasses.csv

   [ ] Class Import ID

What is the format of this import file?
  - Delimited: Characters separate the fields
  - Fixed With: Fields and records have a set length

Field Separators and Text Qualifiers

Field Separator: [ ]
Text Qualifier: [ ]

Sample Import Format
<table>
<thead>
<tr>
<th>Course ID</th>
<th>School</th>
<th>Start Term</th>
<th>Academic Year</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>ECNS 4202</td>
<td>Upper</td>
<td>Fall</td>
<td>2003-2004</td>
<td>Regular</td>
</tr>
<tr>
<td>ALAB 101</td>
<td>Upper</td>
<td>Fall</td>
<td>2003-2004</td>
<td>Regular</td>
</tr>
<tr>
<td>GEOM 201</td>
<td>Upper</td>
<td>Fall</td>
<td>2003-2004</td>
<td>Regular</td>
</tr>
</tbody>
</table>
```

12. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.

   If you select “Other” in the **Field separator** field or “Custom” in the **Text qualifier** field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

---

**Note:** The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with *The Education Edge*. **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.

   If you select “Other” in the **Field separator** field or “Custom” in the **Text qualifier** field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

---
13. In the **Import Field Names** frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

If you mark **Field names are in a separate file**, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

**Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add **Attribute Type** on the Fields tab, you must add **Attribute Description** because it is now required. For more information about required fields, see “Required Fields” on page 13.

14. Click **Next**. The Fields tab appears. On the Fields tab, you match data in the import file with **Education Edge** record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.

15. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

16. In the **Import Options** frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.
Tip: You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the Program Basics Guide.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

17. Mark **Create an output query of the records imported** to save a query of imported records.

18. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions.

Warning: If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

19. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

20. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

Note: You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

21. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

22. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.

23. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View control report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.
24. If you selected to preview the control report on the Options/Summary tab, click **Close** on the completion screen and the report automatically opens.

[Image of the New Import Control Report window]

25. If you did not select to print or preview the control report, you can see import results by clicking **View Control Report** on the Import screen. When you finish viewing the report, close the report to return to the import record.

**Importing Actions**

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.

You can import new action records or update existing ones.

- Use the record ID for the **Action for ID** field. For example, if you are assigning the action to a student, use the student’s record ID.
- For the **Action for record type** field, use the record type for which you are importing the action. For example, if you are assigning the action to a student, use Student for this field.

**Required Fields**

The import file used in this example includes the minimum fields required to import new students, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school's data entry protocols or your school's settings in **Configuration**. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

| Action for ID* | Action type* |
Importing actions

1. On the Import records page, select the Action import type from the tree view.

2. On the action bar, click **New Import**. The Import - Action screen appears on the General tab.

**Warning:** We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the **What do you want to do?** frame, mark **Import new records**.
4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

**Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

6. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

7. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

8. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.

**Note:** The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with *The Education Edge*.

9. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.
10. Click **Next**. The File Layout tab appears.

11. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.

   If you select “Other” in the **Field separator** field or “Custom” in the **Text qualifier** field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

12. In the **Import Field Names** frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

   If you mark **Field names are in a separate file**, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

   **Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add **Attribute Type** on the Fields tab, you must add **Attribute Description** because it is now required. For more information about required fields, see “Required Fields” on page 13.
13. Click **Next**. The Fields tab appears. On the Fields tab, you match data in the import file with *Education Edge* record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.

14. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

15. In the Import Options frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

   **Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

   In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

16. Mark **Create an output query of the records imported** to save a query of imported records.
17. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

18. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

19. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

20. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

21. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.

22. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View control report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.
23. If you selected to preview the control report on the Options/Summary tab, click Close on the completion screen and the report automatically opens.

24. If you did not select to print or preview the control report, you can see import results by clicking View Control Report on the Import screen. When you finish viewing the report, close the report to return to the import record.

### Importing Grades

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.

You can import new grade records or update existing ones. Unlike other import types, you can import or update grades during the same import.

- When importing grades, comments, or skill ratings, you can specify to which student, course, academic year, and session you want to add or update entries by using one of these methods:

  1) Include the **Student Course Import ID** field. Using this field automatically adds the student, course, academic year, and session information from the student course record. You can find the Student Course Import ID by showing the **Student Course Import ID** column in the grid on the Courses tab of the student record. You can also create a student export using Export. The field is located in the Courses criteria group.

  2) Include the **Class Import ID** field and either the **Student ID** or **Student Import ID** field.

  3) Include the **Academic Year**, **Session**, **Course ID** fields and either the **Student ID** or **Student Import ID** field.

- When adding a grade, comment, or skill rating to an Other Course, include the **Is Other Course** field with a value of Yes.

- When importing grades for a student who is enrolled in different class sections of a course in different terms of the same academic year, include the **Class Start Term** field and the appropriate term value to import.

- When importing grades for a student who is enrolled in two courses with the same Course ID, include the **School** field with the appropriate school value.
• When importing grades for a student who is enrolled in a course multiple times in the same term, include the **Class Section** field with the appropriate class value.

• You can import multiple comments for an academic year that uses numeric comments by entering the numbers separated by commas (1, 2, 3).

• When importing skills that are not associated with categories, you can use <None> as the value for the **Category** field. Entering a category is required only if there are skills with duplicate names on the course.

**Required Fields**

The import file used in this example includes the minimum fields required to import new students, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in **Configuration**. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

Marking Column*  
Student ID  
Academic Year  

- Importing grades

1. On the Import records page, select the Grade import type from the tree view.
2. On the action bar, click **New Import**. The Import - Grade screen appears on the General tab.

![Image of the Import - Grade screen](image)

**Warning:** We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

**Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

6. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

7. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

8. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.
9. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

10. Click **Next**. The File Layout tab appears.

11. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.

If you select “Other” in the **Field separator** field or “Custom” in the **Text qualifier** field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “;” not “period”. 

**Note:** The import file used in this example is a *.csv data file. We recommend using the *.csv format because it is the easiest to use with *The Education Edge*. 
12. In the **Import Field Names** frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

If you mark **Field names are in a separate file**, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

**Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add **Attribute Type** on the Fields tab, you must add **Attribute Description** because it is now required. For more information about required fields, see “Required Fields” on page 13.

13. Click **Next**. The Fields tab appears. On the Fields tab, you match data in the import file with **Education Edge** record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.

![Image of the Fields tab with data matching process and field mapping examples.](image-url)
14. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

15. In the **Import Options** frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the Program Basics Guide.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

16. Mark **Create an output query of the records imported** to save a query of imported records.

17. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

18. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

19. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

20. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

21. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.
22. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View control report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.

23. If you selected to preview the control report on the Options/Summary tab, click **Close** on the completion screen and the report automatically opens.

24. If you did not select to print or preview the control report, you can see import results by clicking **View Control Report** on the Import screen. When you finish viewing the report, close the report to return to the import record.

**Importing GPA**

---

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.
You can import new GPA calculations or update existing ones.

**Required Fields**

The import file used in this example includes the minimum fields required to import new students, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in **Configuration**. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Year*</td>
<td>Session*</td>
</tr>
<tr>
<td>GPA Calculation*</td>
<td>Student ID</td>
</tr>
<tr>
<td>GPA</td>
<td>Marking Column</td>
</tr>
</tbody>
</table>

### Importing GPA

1. On the Import records page, select the GPA import type from the tree view.
2. On the action bar, click **New Import**. The Import - GPA screen appears on the General tab.

![Image of the Import - GPA screen](image)

**Warning:** We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

**Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

6. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

7. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

8. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.
9. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

10. Click **Next**. The File Layout tab appears.

11. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.
If you select “Other” in the Field separator field or “Custom” in the Text qualifier field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

12. In the Import Field Names frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

If you mark Field names are in a separate file, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

Warning: When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add Attribute Type on the Fields tab, you must add Attribute Description because it is now required. For more information about required fields, see “Required Fields” on page 13.

13. Click Next. The Fields tab appears. On the Fields tab, you match data in the import file with Education Edge record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.
14. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

15. In the **Import Options** frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

16. Mark **Create an output query of the records imported** to save a query of imported records.

17. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

18. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

19. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

20. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

21. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.
22. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View control report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.

23. If you selected to preview the control report on the Options/Summary tab, click **Close** on the completion screen and the report automatically opens.

24. If you did not select to print or preview the control report, you can see import results by clicking **View Control Report** on the Import screen. When you finish viewing the report, close the report to return to the import record.

**Importing Performance**

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.
You can import new performance calculations or update existing ones.

**Required Fields**

The import file used in this example includes the minimum fields required to import new students, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in Configuration. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

- Academic Year*
- Session*
- Performance Category*
- Marking Column
- Student ID
- Performance Level

**Importing performance**

1. On the Import records page, select the Performance import type from the tree view.
2. On the action bar, click **New Import**. The Import - Grade screen appears on the General tab.

![Import - Grade screen](image)

**Warning:** We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

**Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

6. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the **Program Basics Guide**.

7. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

8. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.
9. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

![Import file format](image)

10. Click **Next**. The File Layout tab appears.

![File Layout tab](image)

11. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.

![Field Separators and Text Qualifiers](image)
If you select “Other” in the Field separator field or “Custom” in the Text qualifier field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

12. In the Import Field Names frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

If you mark Field names are in a separate file, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

**Warning:** When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add Attribute Type on the Fields tab, you must add Attribute Description because it is now required. For more information about required fields, see “Required Fields” on page 13.

13. Click Next. The Fields tab appears. On the Fields tab, you match data in the import file with Education Edge record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.
14. When you have finished setting all fields, click **Next**. The Options/Summary tab appears.

![Import Options frame](image)

15. In the **Import Options** frame, mark **Create exception file of records not updated/imported** to create a file of all fields that do not import successfully.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

16. Mark **Create an output query of the records imported** to save a query of imported records.

17. Mark **Create control report** to view or print a report listing the import results, criteria, field mappings, and exceptions.

**Warning:** If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark **Preview** to view the report on your screen or mark **Print** to print the report.

18. Review information in the **Import Summary Information** frame. If you are satisfied with the set parameters, click **Import Now**.

19. The program asks if you want to save changes. To save, click **Yes**. If this is the first time you have saved the import record, the Save Import As screen appears.

**Note:** You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

20. In the **Name** field, enter a name for the import. In the **Description** field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click **Save**.

21. If you marked **Create an output query of the records imported** on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click **Save**.
22. Once the program begins processing the import, a progress bar appears. If you click **Cancel**, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click **Exit Import**, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click **View control report**, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.

23. If you selected to preview the control report on the Options/Summary tab, click **Close** on the completion screen and the report automatically opens.

24. If you did not select to print or preview the control report, you can see import results by clicking **View Control Report** on the Import screen. When you finish viewing the report, close the report to return to the import record.
Importing Rankings

**Warning:** We strongly recommend reading the Import Basics chapter carefully before you begin to create imports. It explains in detail important topics such as setting up and formatting import files, using headers, and identifying required fields. The Import Basics chapter also includes procedures for basic and advanced import processes including creating a header file, mapping fields, and exporting, updating, and importing records.

You can import new rankings or update existing ones.

**Required Fields**

The import file used in this example includes the minimum fields required to import new students, plus additional fields that are not required but are recommended for maintaining accurate and detailed records. You may need to include others that are not used in this example but are required by your school’s data entry protocols or your school’s settings in *Configuration*. For more information about required fields, see “Required Fields” on page 13.

These are the fields imported in the following procedure. Those marked with an asterisk (*) are required fields when importing new records. Other fields may be required when updating existing records. For more information about required fields, see “Required Fields” on page 13.

- **Student ID** *
- **Academic Year** *
- **Session** *
- **Ranking Calculation** *
- **Marking Column**
- **Interval**
- **Rank**
- **Out Of**

**Importing rankings**

1. On the Import records page, select the Rank import type from the tree view.
2. On the action bar, click **New Import**. The Import - Grade screen appears on the General tab.

3. In the **What do you want to do?** frame, mark **Import new records**.

4. To validate the import file before actually adding records, mark **Validate data only**. When you later click **Validate Now**, the import file is validated but no changes are made to your database. After you validate the import file and you are ready to run the import, unmark **Validate data only**.

5. To import table entries not currently present in the program, mark **Create new table entries** in the **Options** frame. We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting. For example, it may add several versions of a title, such as Dr., Dr, DR.

   If you select **Create new table entries** when you are validating data, the program does not actually create new table entries. Rather, the program processes records as if it were going to create new table entries.

6. In the **Use [ ] when importing table entries** field, select “Long Description” or “Short Description” as the default format to use when importing fields containing table entries. The selected format is used by default only when you do not specify a format in the import file. For more information about formatting table entries, see “Table Entries” on page 16.

**Tip:** You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the *Program Basics Guide*.

7. In the **Import file** field, enter the path of the data file to import or click the ellipsis to browse to the file.

8. In the **Use [ ] to match records in the import file with existing records** field, select the record ID contained in the import file. This field is used for linking imported records with records already saved in the database. For more information about import IDs, see “Import IDs” on page 12.

---

**Warning:** We recommend that you validate and test an import file before running the actual import process. For more information about testing and validating import files, see “Testing and Validating Import Files” on page 21.

**Note:** We recommend that you do not add table entries when importing. It may result in duplicate entries, some with misspellings and incorrect formatting.
9. In the **What is the format of this import file?** frame, mark **Delimited**. For more information about using the delimited format, see “Delimited Data Formats” on page 10.

10. Click **Next**. The File Layout tab appears.

11. In the **Field Separators and Text Qualifiers** frame, select the field separators and text qualifiers used in the import file.
If you select “Other” in the Field separator field or “Custom” in the Text qualifier field, enter the separator and qualifier to use in the corresponding text box. Enter the actual separator and qualifier, not their names. For example, enter “.” not “period”.

12. In the Import Field Names frame, mark the option designating the location of field names in the import file. Field names can be on the first line of the import file, not included in the import file, or contained in a separate file.

If you mark Field names are in a separate file, enter the path of the file which contains the field names or click the ellipsis to browse to the file.

Warning: When you add fields on the Fields tab, be sure you also add conditionally required fields. For example, if you add Attribute Type on the Fields tab, you must add Attribute Description because it is now required. For more information about required fields, see “Required Fields” on page 13.

13. Click Next. The Fields tab appears. On the Fields tab, you match data in the import file with Education Edge record fields. For more information about mapping fields, see “Mapping Fields on the Fields Tab” on page 28.
14. When you have finished setting all fields, click Next. The Options/Summary tab appears.

15. In the Import Options frame, mark Create exception file of records not updated/imported to create a file of all fields that do not import successfully.

Tip: You can set a default file path on the File Locations tab of Options. For more information, see the Options chapter of the Program Basics Guide.

In the field to the right, enter the path where you want the file saved, or click the ellipsis to browse to the file.

16. Mark Create an output query of the records imported to save a query of imported records.

17. Mark Create control report to view or print a report listing the import results, criteria, field mappings, and exceptions.

Warning: If business rules are set for the program to ask before creating an item, those items will not be created while importing records. If you want to import them, you must change the business rule before importing.

If you create a control report, mark Preview to view the report on your screen or mark Print to print the report.

18. Review information in the Import Summary Information frame. If you are satisfied with the set parameters, click Import Now.

19. The program asks if you want to save changes. To save, click Yes. If this is the first time you have saved the import record, the Save Import As screen appears.

Note: You can use the parameters from saved import records for future imports in which you want to use the same or similar parameters.

20. In the Name field, enter a name for the import. In the Description field, enter a description for the import. Mark the checkboxes to allow other users to run or modify the import. Click Save.

21. If you marked Create an output query of the records imported on the Options/Summary tab, the Save Query As screen appears. Enter a name and description of the query and click Save.
22. Once the program begins processing the import, a progress bar appears. If you click Cancel, the Cancel Import screen appears. On this screen, you can view a control report, resume the import, or exit the import. If you click Exit Import, the import creation process stops, and any data imported up to the point of cancellation is in the database. If you click View control report, the control report appears. When you close it, you can resume or exit the import again.

When the import is finished, a completion screen appears. This screen shows the import statistics including the number of records processed, records added, records updated, and exceptions.

23. If you selected to preview the control report on the Options/Summary tab, click Close on the completion screen and the report automatically opens.

24. If you did not select to print or preview the control report, you can see import results by clicking View Control Report on the Import screen. When you finish viewing the report, close the report to return to the import record.
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