



Scholastic ONline Information System
for the Web

Importing Name Records Using an Excel Spreadsheet Import

© 2001 - 2008 RJM Systems – all rights reserved

October 2008

RJ
M Systems, Inc

Table of Contents

TABLE OF CONTENTS	2
EXCEL TABLE REQUIREMENTS	3
DEALING WITH ERROR MESSAGES	13
DEALING WITH DUPLICATE RECORDS	14
DEALING WITH NEW AND DUPLICATE RECORDS SIMULTANEOUSLY	15

Adobe® is the registered trademark of Adobe Systems, Inc.

Cold Fusion™ is a trademark of the Macromedia Corporation a part of Adobe Systems, Inc.

Crystal Reports™ is a trademark of Business Objects SA.

Firefox™ is a trademark of the Mozilla Foundation.

Google® is the registered trademark of Google, Inc.

Lotus®, Lotus 1-2-3™, and WordPro™ are trademarks of Lotus Development Corporation a subsidiary of the IBM Corp.

Microsoft®, SQL Server™, and FoxPro™ are trademarks of the Microsoft Corporation.

Netscape® is a trademark of Netscape Communications Corporation.

OpenOffice and StarOffice™ is a trademarks of Sun® Microsystems, Inc.

SONISWEB®, SONIS®, RJM Systems, and related logos are trademarks of RJM Systems, Inc.

The Financial Edge® and The Raiser's Edge® are trademarks of Blackbaud®, Inc.

WordPerfect® is a trademark of Corel® Corporation.

(Importing Names Using Excel Files.doc - 10/22/2008 2:38:00 PM)

EXCEL TABLE REQUIREMENTS

- Name records can be imported into SONISWEB™ (SW) using data defined within an Excel spreadsheet. In order for the import to work correctly the following fields and the order in which they are listed below **must** be strictly adhered to otherwise the import will fail. The fields which have an * are required fields. Any imported data field must have the appropriate matching table pre-defined in SW before the import can take place. (Speak to SONISWEB™ support (support@sonis.com) if you are not sure how to pre-define tables in SW or if you have any other questions relevant to table structure/maintenance in SW).

Column Header (SONISWEB™ data field name)	Explanation of Data Field
last_name*	Must be no more than 30 characters in length. The format (upper/lower case) will depend on how you wish to see the names displayed in SONISWEB™. (We suggest the following: Smith). This information is stored on the Biographic page of a SW name record.
first_name*	Must be no more than 30 characters in length. The format (upper/lower case) will depend on how you wish to see the names displayed in SONISWEB™. (We suggest the following: John). This information is stored on the Biographic page of a SW name record.
Birthdate*	Format must be: mm/dd/yyyy This information is stored on the Biographic page of a SW name record.
e_mail*	Proper email format xxx@xxx.xxx OR use question mark symbol (?) if none available. This information is stored on the Address page of a SW name record.
acadstat_cod*	Up to 8 character Academic Standing code. In SW use Systems/Table Maintenance/Academic Status to pre-define the codes. The actual (1-8 character) code entered in the SW acadstat_cod area must match exactly the data used in the import field. If no such data is coming from the data import then a code of TBD must be used both in SW as well as the imported data field for each record.
affiliation_cod	Up to 2 character Affiliation code: used to identify a billing exception to the standard billing rules. In SW use Systems/Affiliation to pre-define codes. As this is not a required field it can be left blank in the imported data field. This information is stored on the Biographic page of a SW name record.

Column Header (SONISWEB™ data field name)	Explanation of Data Field
camp_cod*	Up to 10 character Campus code affiliated to name record. This information is stored on the Biographic page of a SW name record. In SW use Systems/Campuses to pre-define codes. The actual (1-10 character) code entered in the SW Campus code field area must match exactly the data used in the import field. If no such data is coming from the data import then a code of TBD must be used both in SW as well as the imported data field for each record.
citizen*	1 = yes/0 = no. This information (citizen checkbox) is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
deceased*	1 = yes/0 = no This information (deceased checkbox) is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
dec_date	Date of Death, if applicable (mm/dd/yyyy) This information is stored on the Biographic page of a SW name record. If not applicable the import data field can be left blank unless the deceased checkbox (above) has been marked with a 1(yes) on any of the importing records, then it too must have a corresponding dec_date .
dept_cod*	Up to 4 character Department code affiliated with name record. This information is stored on the Biographic page of a SW name record. In SW use Systems/Department to pre-define codes. The actual (1-4 character) code entered in the SW Department code field area must match exactly the data used in the import field. If no such data is coming from the data import then a code of TBD must be used both in SW as well as the imported data field for each record.
disabled*	1 = yes/0 = no This information is stored on the Biographic page of a SW name record. It is used to indicate whether a particular name record is prevented from having online access to their SW account. The import data field must include either a 1 or 0 in each record to be imported.

Column Header (SONISWEB™ data field name)	Explanation of Data Field
div_cod*	2 character Division code affiliated with name record. This information is stored on the Biographic page of a SW name record. In SW use Systems/Division to pre-define codes. The actual (2 character) code entered in the SW Division code field area must match exactly the data used in the import field. If no such data is coming from the data import then a code of TB must be used both in SW as well as the imported data field for each record.
ethnic_cod*	Up to 2 character code that identifies ethnicity. This information is stored on the Biographic page of a SW name record. In SW use Systems/Table Maintenance/Ethnic Codes to pre-define codes. The actual (1-2 character) code entered in the SW ethnic_cod field area must match exactly the data used in the import field. If no such data is coming from the data import then a code of U (unknown) must be used both in SW as well as the imported data field for each record.
exam_id	9 digit random number assigned to students used by schools who need anonymity when faculty are submitting grades. It replaces the student name on the class (grade input) roster with an assigned exam ID # instead. This information is stored on the Biographic page of a SW name record. If not applicable the import data field can be left blank.
excl_billing*	1 = yes/0 = no (used to exclude from billing). This information is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
excl_blk_trans*	1 = yes/0 = no (used to exclude from bulk transactions) This information is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
excl_mailing*	1 = yes/0 = no (used to exclude from mailings) This information is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
fund_stat	User defined 2 character field. This information is stored on the Biographic page of a SW name record. If not applicable the import data field can be left blank.

Column Header (SONISWEB™ data field name)	Explanation of Data Field
Gender*	1 character code used to identify gender. This information is stored on the Biographic page of a SW name record. In SW use Systems/Table Maintenance/Gender to pre-define codes. The actual (1 character) code entered in the SW gender_cod field area must match exactly the data used in the import field. If no such data is coming from the data import then a code of 'T' must be used both in SW as well as the imported data field for each record.
iped_stat*	2 character code that identifies IPED status. This information is stored on the Biographic page of a SW name record. In SW use Systems/Table Maintenance/IPED Status to pre-define codes. The actual (1-2 character) code entered in the SW iped_stat field area must match exactly the data used in the import field. If no such data is coming from the data import then a code of 'TB' must be used both in SW as well as the imported data field for each record.
level_*	1 character Level code affiliated with name record. This information is stored on the Biographic page of a SW name record. In SW use Systems/Table Maintenance/Levels to pre-define codes. The actual (1 character) code entered in the SW level_ code field area must match exactly the data used in the import field. If no such data is coming from the data import then a code of 'T' must be used both in SW as well as the imported data field for each record.
maiden	Must be no more than 22 characters in length. This information is stored on the Biographic page of a SW name record. As this is not a required field the import data field can be left blank.
mar_cod*	2 character code that identifies Marital status. This information is stored on the Biographic page of a SW name record. In SW use Systems//Table Maintenance/Marital Status to pre-define codes. The actual (1-2 character) code entered in the SW mar_cod field area must match exactly the data used in the import field. If no such data is coming from the data import then a code of 'TB' must be used both in SW as well as the imported data field for each record.
mi	1 character letter used to identify Middle Initial. This information is stored on the Biographic page of a SW name record. As this is not a required field the import data field can be left blank.

Column Header (SONISWEB™ data field name)	Explanation of Data Field
nickname	Must be no more than 20 characters in length. The format (upper/lower case) will depend on how you wish to see the names displayed in SONISWEB™. This information is stored on the Biographic page of a SW name record. As this is not a required field the import data field can be left blank.
notpubname*	1 = yes/0 = no (used to indicate person's name is/not to be displayed if doing a name search in student/faculty/alumni access). This information is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
nslch_block*	1 = yes/0 = no (used to prevent this student's records from being disclosed in National Student Loan Clearinghouse reports). This information is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
nslch_block_date*	1 = yes/0 = no (date blocked from National Student Loan Clearing House). This information is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
online_hld*	1 = yes/0 = no (name record is blocked from online registration through student access). This information is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
photo	Photo file name (name of jpg file i.e. xxxxx.jpg). This information is stored on the Biographic page of a SW name record. As this is not a required field the import data field can be left blank.
pin	Up to 6 character Personal identification number used for login purposes. This information is stored on the Biographic page of a SW name record. The attributes of all assigned PINs are determined by the following tables in Systems: PIN Length and Pin Numbers. As this is not a required field the import data field can be left blank.
prefix	Must be no more than 20 characters in length. The format (upper/lower case) will depend on how you wish to see the prefix displayed in SONISWEB™. This information is stored on the Biographic page of a SW name record. As this is not a required field the import data field can be left blank.

Column Header (SONISWEB™ data field name)	Explanation of Data Field
releas_dt	User defined date field corresponding to releas_inf. Format is mm/dd/yyyy. This information is stored on the Biographic page of a SW name record. . As this is not a required field the import data field can be left blank unless it is used in conjunction with releas_inf (below).
releas_inf*	1 = yes/0 = no This information (user defined checkbox) is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
retries	How many login retries (up to a maximum of 8) before user locked out. This information is stored in Systems/Web Option. As this is not a required field the import data field can be left blank.
show_addr*	1 = yes/0 = no (used to indicate person's address is not to be displayed if doing a name search in student/faculty/alumni access).). This information is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
show_email*	1 = yes/0 = no (used to indicate person's email is not to be displayed if doing a name search in student/faculty/alumni access).). This information is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
show_phone*	1 = yes/0 = no (used to indicate person's phone number is not to be displayed if doing a name search in student/faculty/alumni access).). This information is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
show_wkphn*	1 = yes/0 = no (used to indicate person's work phone number is not to be displayed if doing a name search in student/faculty/alumni access).). This information is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
soc_sec	9 character identifier used in SW as a Personal identification (PID) User's ID. This information is stored on the Biographic page of a SW name record. This IS NOT the social security number. As this is not a required field the import data field can be left blank.

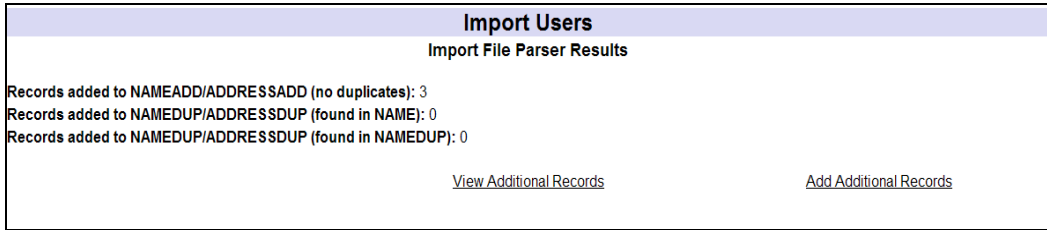
Column Header (SONISWEB™ data field name)	Explanation of Data Field
sonis_id	User's SONISWEB™ ID. This information is stored on the Biographic page of a SW name record. As this is not a required field the import data field can be left blank.
ssn	Official Social Security Number (if used, it must include 9 digits, no dashes) This information is stored on the Biographic page of a SW name record. As this is not a required field the import data field can be left blank.
suffix	Must be no more than 20 characters in length. The format (upper/lower case) will depend on how you wish to see the suffix displayed in SONISWEB™. This information is stored on the Biographic page of a SW name record. As this is not a required field the import data field can be left blank.
tuit_stat	2 character user defined code. This information is stored on the Biographic page of a SW name record. In SW use Systems/Table Maintenance/Tuition Status to pre-define codes. This information is stored on the Biographic page of a SW name record. As this is not a required field the import data field can be left blank.
Veteran*	1 = yes/0 = no (used to indicate person's veteran status for Financial Aid awarding purposes.) This information is stored on the Biographic page and Financial Aid page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.
add_add2	Up to 35 characters in length and used to populate 3rd address line. This information is stored on the Address page of a SW name record. As this is not a required field the import data field can be left blank.
add_addr	Up to 35 characters in length and used to populate 2nd address line. (i.e. Apt 23B). This information is stored on the Address page of a SW name record. As this is not a required field the import data field can be left blank.
bad*	1 = yes/0 = no (checkbox used to denote a bad/invalid address). This information is stored on the Address page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported
cell_phone	Up to 15 character cell phone number stored in the Address page of a SW name record. As this is not a required field the import data field can be left blank.

Column Header (SONISWEB™ data field name)	Explanation of Data Field
city	Up to 35 character city name stored in the Address page of a SW name record. As this is not a required field the import data field can be left blank.
country*	Up to 25 character country code stored in the Address page of a SW name record. In SW use Systems//Table Maintenance/Country to pre-define codes. The actual (1-25 character) code entered in the SW country field area must match exactly the data used in the import field.
county_cod	Up to 3 character code to identify the names of local counties. Stored in the Address page of a SW name record. In SW use Systems//Table Maintenance/County to pre-define codes. The actual (1-3 character) code entered in the SW county_cod field area must match exactly the data used in the import field. As this is not a required field the import data field can be left blank.
fax	Up to 15 character fax number stored in the Address page of a SW name record. As this is not a required field the import data field can be left blank.
IPED_addr	0 = no. The import data field must include a 0 in each record to be imported
phone	Up to 15 character phone number stored in the Address page of a SW name record. As this is not a required field the import data field can be left blank.
Preferred*	1 = yes (**preferred address checkbox). Stored in the Address page of a SW name record. As this is a required field and the 1 address used on import must also be designated as the preferred address then the imported data field must include a 1 for every imported record.
salutation	Must be no more than 75 characters in length. The format (upper/lower case) will depend on how you wish to see the salutation displayed in SONISWEB™ letters or emails. This information is stored on the Address page of a SW name record. As this is not a required field the import data field can be left blank.
st_addr	Up to 35 characters in length and used to populate 1st address line stored on the Address page of a SW name record. As this is not a required field the import data field can be left blank.

Column Header (SONISWEB™ data field name)	Explanation of Data Field
state*	2 character code in length and used to populate state name stored on the Address page of a SW name record. In SW use Systems/Table Maintenance/States to pre-define codes. The actual (2 character) code entered in the SW state_abbr field area must match exactly the data used in the import field.
work_phone	Up to 15 character work phone number stored in the Address page of a SW name record. As this is not a required field the import data field can be left blank.
zip	Up to 10 character zip code number stored in the Address page of a SW name record. As this is not a required field the import data field can be left blank.
labels*	1 = yes/0 = no (checkbox used to produce mailing labels to send mailings to multiple addresses.) Stored on the Address page of a SW name record. . The import data field must include either a 1 or 0 in each record to be imported
labels2*	1 = yes/0 = no (checkbox used to produce mailing labels to send mailings to multiple addresses.) Stored on the Address page of a SW name record. . The import data field must include either a 1 or 0 in each record to be imported
labels3*	1 = yes/0 = no (checkbox used to produce mailing labels to send mailings to multiple addresses.) Stored on the Address page of a SW name record. . The import data field must include either a 1 or 0 in each record to be imported
type*	Up to 15 character code used in identifying the various address types stored in the Address page of a SW name record. In SW use Systems/Table Maintenance/Address Types to pre-define codes. The actual (1-15 character) code entered in the SW type code must match exactly the data used in the import field. As this is a required field it cannot be left blank in either SW or the imported data field.
mod_stat*	Status (hard coded 2 character code in SW to identify the role/status of a name record as AL= Alumni, AP= Applicant, CO=Constituent, FA=Faculty, OA = Online Applicant, PS=Prospect, SF=Staff, ST=Student, WD=Withdrawn. The import data field must match exactly the above-noted pre-defined SW status 2 character codes.

Column Header (SONISWEB™ data field name)	Explanation of Data Field
incl_directory*	1 = yes/0 = no (checkbox used to include name in “Enrolled Student Directory” report). This information is stored on the Biographic page of a SW name record. The import data field must include either a 1 or 0 in each record to be imported.

1. Save the Excel data spreadsheet.
2. In SONISWEB™, click **SYSTEMS** and then Import Users from the function list. (Make sure you attempt this import in a test environment first and ALWAYS be sure to have done a backup of SONISWEB™ before using this import in your actual production database).
3. Browse out to the saved Excel data. Be careful to indicate that this file type is an Excel file type (xls) otherwise you will get an error message when you attempt to import. Click SUBMIT to begin the import process. With a correct file format the display screen will confirm the importing of users as seen in Figure 1.

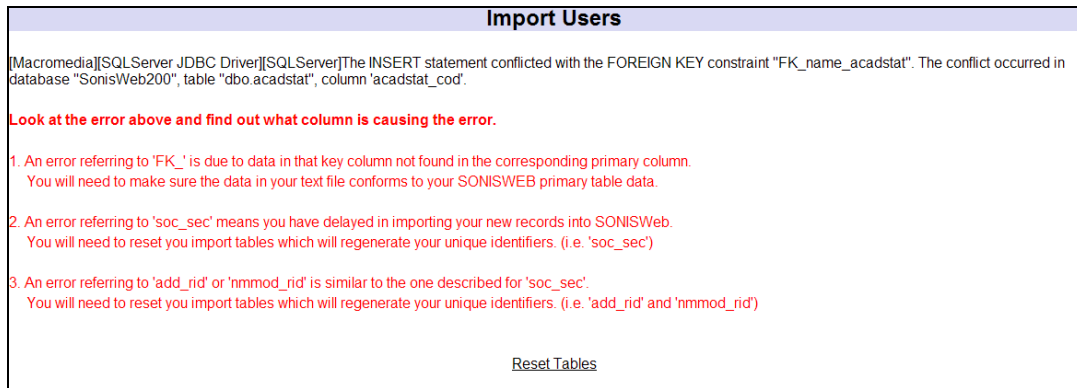


• Figure 1 Confirming Message

4. Click “Add Additional Records” link to proceed with the import.

DEALING WITH ERROR MESSAGES

5. If there is an error within the data field import file SONISWEB™ will display the following type of error message. The cause of the error can be determined by the text message. You must go back and fix the import data file before re-attempting the import.



• Figure 2 Error Messages

6. If you encounter the above mentioned error page click the [Reset Tables](#) link to replace the prior import tables with the new data you wish to import. You will see Figure 3. Click on the link to return to the main import screen and retry the corrected import.



• Figure 3 Confirmation of Reset Tables

7. On re-import, the link that says “view additional records” (Figure 1) will enable you to see a list of the records being imported. This is your opportunity to review the proposed import records for accuracy. If you notice an issue, make note of it so you can go back to the original data file and correct it.
8. The link that says “Add additional records” (Figure 1) will enable the import process to proceed.
9. If the import is successful you will see the following message on screen: “All the new records have been successfully imported into Sonisweb”.

DEALING WITH DUPLICATE RECORDS

10. Prior to an import all rows are checked for duplicate data, that data is checked against the Name and Address records in SONISWEB™ to determine if there are any suspected duplicates.
11. If a suspected duplicate is found, a user ID is created and the data from your file is stored in the NAMEDUP and ADDRESSDUP tables. The Figure 4 shows how SONISWEB™ notifies you of the duplicates.

Import Users
Import File Parser Results

Records added to NAMEADD/ADDRESSADD (no duplicates): 0
Records added to NAMEDUP/ADDRESSDUP (found in NAME): 3
Records added to NAMEDUP/ADDRESSDUP (found in NAMEDUP): 0

[View Duplicate Records](#)

• Figure 4 Notification of Duplicates

12. Click the “View Duplicate Records” link to see the duplicate records. Before attempting a re-import you may want to remove the duplicates from your import data file or correct them if they are not actual duplicates. Leaving the duplicates in the import file is OK too as SONISWEB™ will not permit the re-import of duplicate records [i.e. A “Y” in the column “SSN Dup.” means that SONISWEB™ matched the social security number in your import file with the social security number (SSN) in an existing Biographic record.]
13. Click the “Reset Tables” link (Figure 2) to replace the prior import tables with the new data you wish to import.
14. When no duplicates are found, the user IDs are created and the data from the data file is stored in the NAMEADD and ADDRESSADD tables. You can then proceed to complete the import (as instructed in paragraphs 9 and 10 above).

DEALING WITH NEW AND DUPLICATE RECORDS SIMULTANEOUSLY

15. If a suspected duplicate is found, a user ID is created and the data from your file is stored in the NAMEDUP and ADDRESSDUP tables. New records will be stored in the NAMEADD and ADDRESSADD tables (no duplicates) as shown in Figure 5.

Import Users		
Import File Parser Results		
Records added to NAMEADD/ADDRESSADD (no duplicates): 1		
Records added to NAMEDUP/ADDRESSDUP (found in NAME): 3		
Records added to NAMEDUP/ADDRESSDUP (found in NAMEDUP): 0		
View Duplicate Records	View Additional Records	Add Additional Records

• Figure 5 File Parser Results

16. Click the “View Duplicate Records” link (Figure 5) to see the duplicate records. Before attempting a re-import you may want to remove the duplicates from your import data file or correct them if they are not actual duplicates. Leaving the duplicates in the import file is OK too as SONISWEB™ will not permit the re-import of duplicate records.
17. After viewing duplicates you can click on the link that says “Return” and Figure 6 will be seen.

Import Users			
Reset Tables	View Duplicate Records	View Additional Records	Add Additional Records

• Figure 6 Import Users Display

18. Click the “View Additional Records” link to see a listing of the new records that will be imported. Click “Return” to return to the previous screen.
19. Click “Add Additional Records” link to import the new records into SONISWEB™. Remember that even if you left the duplicate records on your data import SONISWEB™ will only import the new records.