

# Demystifying the Import/Export Tool

January 2015

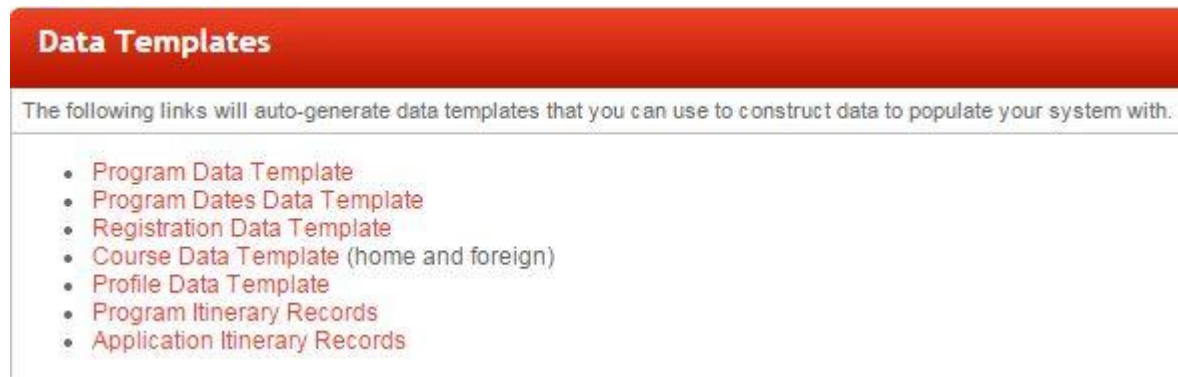
Risk Summit

Chelsey Harwood



# What is the import/export tool?

- Allows Admins with appropriate permissions to export program and registration data.
- It also allows admins to import those same types of data into the system.



- Figure 1: Available Import Templates

# Why would I use the import/export tool?

- I would like to import historical registration records for reporting purposes.
- I would like to update my registrants profiles with a new registrant parameter.
- I would like to update registrant itinerary record



# Keep in mind...

- Import files must be saved as a tab-delimited text file.
- Note for MAC Users: If you have used Microsoft Excel to edit the file, you will need to save the file using the 'Windows Formatted Text' file format.  
*Microsoft Excel for Mac OS X saves tab-delimited files in a way that cannot be parsed by the import utility, but the Windows Formatted Text format will be formatted with expected tab-delimiters and line breaks.*
- Always import 1 or 2 records first to make sure your formatting is correct and you achieve desired results.



# Importing Historical Registrations

- Use the Registration Data Template
- Required Fields: First Name, Last Name, Email,DOB, Gender, Username (UUUID), Term, Year, Status (no alias), Program ID
- Other Fields to include: Anything else you need to include in your reports. The more fields you have the more chance of an error.

[illegible]

# Import Profile Records

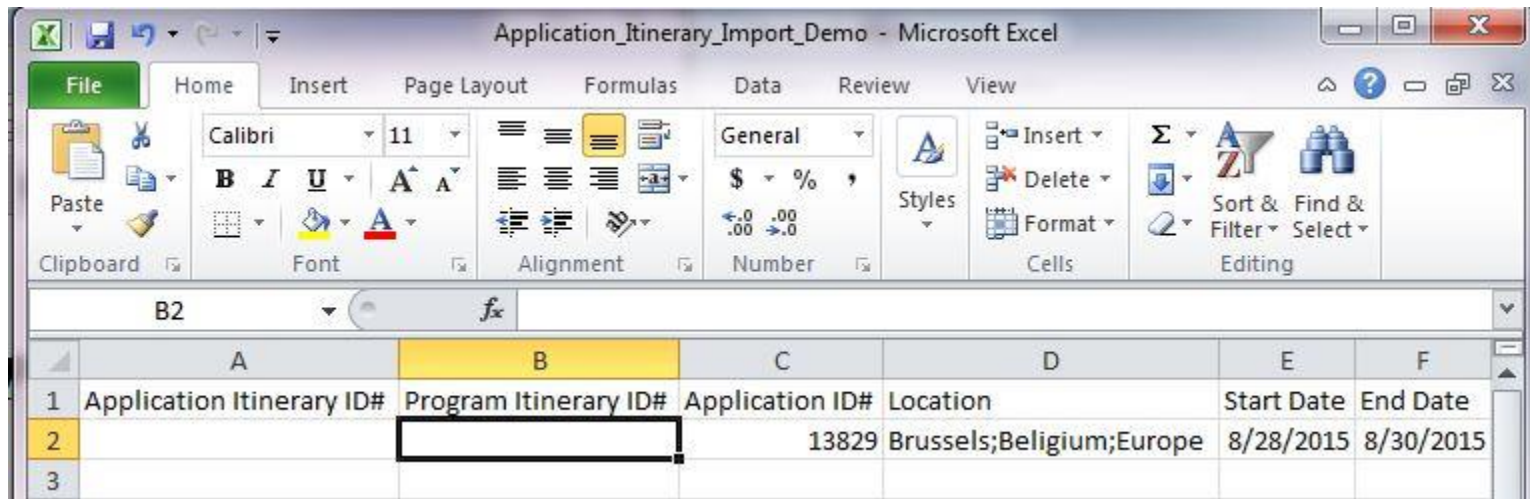
- Use the Profile Data Template
- Required Fields: First Name, Last Name, Email, Username (UUUID), Profile Status
- Other Fields to include: Registrant Parameters

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	User ID	First Name	Middle Name	Last Name	E-mail	CC E-mail	DOB	Gender	Username (UUUID)	Profile Status	Major [AP#130]	Class [AP#131]	GPA [AP#135]	Ethnicity [AP#136]
2		Brittany		Stone	bpstone@tdu.edu		1/1/1993	F	bpstone@tdu.edu	Inc: Non-required				
3														



# Update registration itinerary record

- Use Registration Itinerary Records template
- Required Fields: Registration ID, Location, Start Date and End Date



The screenshot shows a Microsoft Excel window titled "Application\_Itinerary\_Import\_Demo - Microsoft Excel". The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, and View. The Home ribbon is active, showing options for Clipboard, Font, Alignment, Number, Styles, Cells, and Editing. The worksheet contains a table with the following data:

	A	B	C	D	E	F
1	Application Itinerary ID#	Program Itinerary ID#	Application ID#	Location	Start Date	End Date
2			13829	Brussels;Belgium;Europe	8/28/2015	8/30/2015
3						

# Demo

- Our sports team hands you a schedule for the whole season of traveling and you would like to import it





# Discussion

