



Extended Fields Import Guide

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Introduction

Extended Field Imports differ from regular data imports in that they're a way for custom data to be used as fields in one-time broadcasts, as opposed to general data fields that can be used again and again in general-use broadcasts. An extended field import would be used in cases that require specific data (i.e., a spelling bee rank or a placement in a sports tournament) to be relayed to parents in broadcasts that would be sent once.

Extended Field Import Process

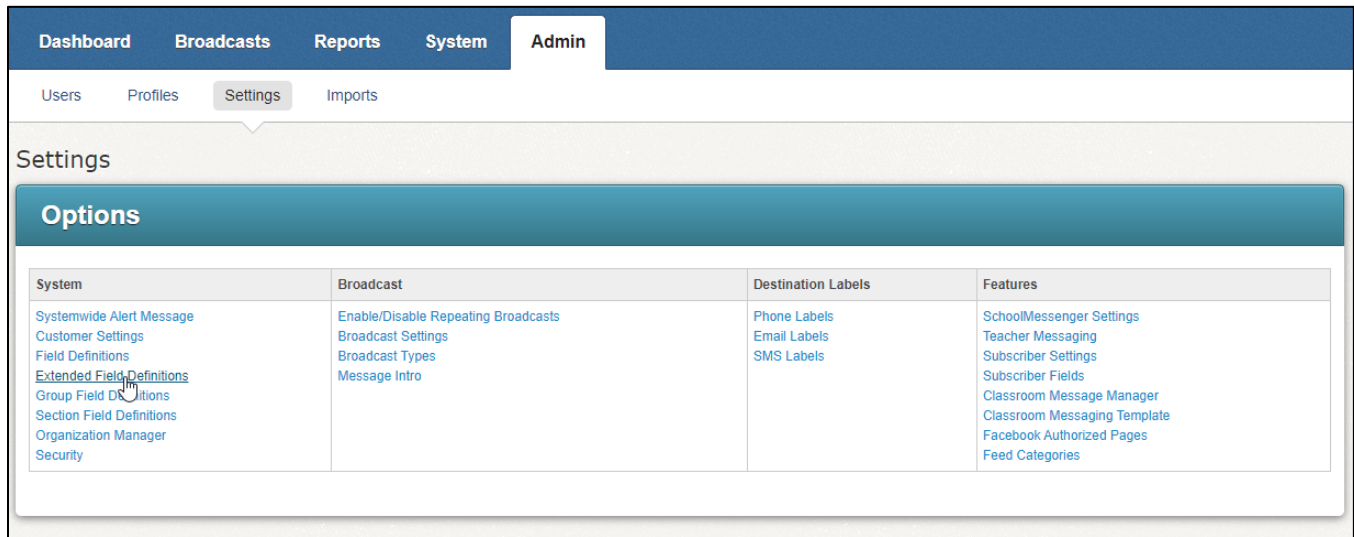
Note: For users to access this feature, they would need to be assigned user profiles with Extended Fields Imports enabled.

Defining Fields

You will need to create and define the fields that your custom data will fall under.

Click the **Admin** tab and the **Settings** sub-tab.

Under the **System** section, click **Field Definitions**. If all 20 fields are defined, click **Extended Field Definitions**.



Note: If you have 20 fields in **Field Definitions** and don't see a link to **Extended Field Definitions**, contact support for assistance.

Enter the **Name** of the field for custom data you'll be using in the space provided and select the **Type**.

Note: The field **Name** is what you'll be referencing when creating your broadcast.

Fields			
Field	Name	Type	Actions
1	<input type="text" value="X_Text"/>	Text	Delete Clear Data
2	<input type="text" value="X_Date"/>	Date	Delete Clear Data
3	<input type="text" value="X_List"/>	List	Delete Clear Data
4	<input type="text" value="X_Number"/>	Numeric	Delete Clear Data
5	<input type="text" value="Spelling Bee Rank"/>	Text	Delete Clear Data
06	<input type="text" value="Library Account"/>	Numeric	Add

Click **Add**. This field is now defined and can now be mapped to your import.

Creating an Extended Field Import

Click the **Admin** tab and then the **Imports** sub-tab.

Click **Add New Import**. You'll be taken to the Import Editor: New Import page.

Select **Person** for the Data field.

Enter a **Name** for the import.

Import Editor: New Import

Submit
Cancel

Import Information

Settings: Data:

Name: * Required

Description:

Submit
Cancel

Click **Submit**.

Select **Update Only** for the Update Method field.

Import Editor: Updated Staff Import

Submit
 Cancel

Import Information

Settings:	Data: Person
	Upload Key: e4e3869237c928c03bb210f641ea21df
	Name: <input type="text" value="Updated Staff Import"/>
	Description: <input style="width: 90%;" type="text"/>
	Notes: <div style="border: 1px solid #ccc; height: 30px; width: 95%;"></div>
	Update Method: <input style="width: 80%;" type="text" value="Update only"/>
	Skip Header Lines: <input style="width: 60%;" type="text" value="0"/>

***Automated upload:** Automatically run data import when upload completes.
[Uncheck this box when configuring import mapping or changing data fields.]

***Associated Jobs:** No Repeating Jobs

[*Note: This option does not apply to data files that are manually uploaded using the Browse option.]

Submit
 Cancel

Click **Submit**. You'll be taken back to the Data Import Manager page.

After submitting the import, a CSV file with the data required/wish to import will need to be uploaded to that import in order to map the fields.

Upload Extended Field Import .CSV File

Find your import on the Data Import Manager page.

Updated Staff Import	Person	Update only	Idle	- Never -	Not Found	Upload Edit Delete
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Click **Upload**. You'll be taken to the Import Upload page.

Click **Choose File** and choose your CSV file.

Click **Upload**.

Once the CSV uploads, the mappings screen will be displayed. Generally field order does not matter, but column 1 must be **Unique ID**. Any additional extended fields can be mapped to any other column of the CSV.

Person	Field	Translator	Translator Options	Import File Data	Actions
Contact ▾	Unique ID ▾	Copy ▾		Column 1 ▾ Previous Next stu1054491 stu1081975 stu1057961 stu1025739 stu1087970 stu1095026 stu1050729 stu1088252 stu1003876 stu1058158	Delete
Contact ▾	Spelling Bee Rank ▾	Copy ▾		Column 2 ▾ Previous Next Sprague Dube Seals Romero Kraft Lusk Landaverde Elliott Swofford Valente	Delete
Contact ▾	- Unmapped - ▾	Copy ▾		- None - ▾ Previous Next	Add

The mapped column will matter when the user creates their CSV. file with their custom data. For example, they will need to put the spelling bee rank under column B in order for the data to fall under that field.

Once the Unique ID is mapped to column 1 and any field which the user wishes to use for this extended field import are mapped, click **Submit** at the bottom of the page. These mappings will be established in the customer's database and this import will be available to any user which has access to it.

Restricting Access to Specific Extended Field Imports or Fields

Admins can restrict access to specific imports at the profile-level.

Click the **Admin** tab and then the **Profiles** sub-tab.

Click **Edit** link next to the profile whose access you'd like to restrict.

Run-Only Imports Grant access to run

- Federated Import
- Staff Import
- Updated Staff Import

Scroll to the bottom of the page and restrict what imports this profile has access to under the **Run-Only Imports** section.

Field Restriction Restrict to these fields:

- Second Phone
- Second Email
- Third Phone

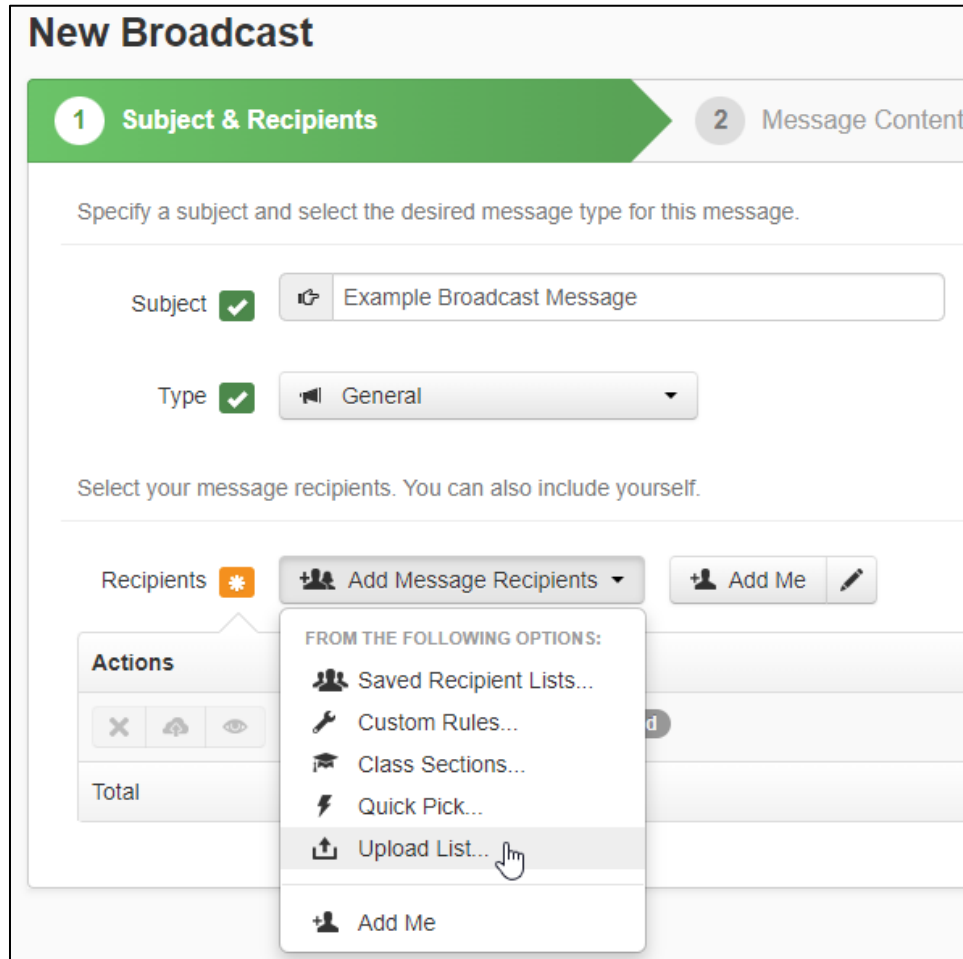
You can also give or restrict access to specific fields under this same profile-edit page under the **Field Restriction** section.

Uploading Custom Data in a New Broadcast

Once the fields have been defined, import created, fields-mapped, and optional profile-restrictions are in place, an extended fields import can be used to send out a broadcast using custom data. First, the user will need to upload the custom data to their broadcast.

From the Dashboard, click **New Broadcast**.

Enter your Broadcast **Subject**.



Click **Add Message Recipients** and select **Upload List**.

Upload List

Type Contact data: File format must be a Comma Separated Value (CSV) text file.

ID# lookup: File format must be a Comma Separated Value (CSV) text file with ID#s only (one per line).

Custom import: File format must be a Comma Separated Value (CSV). The uploaded file must match the mappings for the respective import selected on the following screen.

File No file chosen

Select **Custom Import** under **Type**.

Click **Choose File** to upload the .CSV file with the custom data.

 **Note:** Ensure that your .CSV file with the custom data also contains a column with Student IDs.

Select the correct Import you created earlier in the Imports section and review the data presented in the preview screen.

Custom Import

SELECT AN IMPORT TO RUN WITH THIS UPLOAD

Imports Federated Imports Test

Also Federated Test Too

Federated Import 3

Preview

Contacts not found 3

Unique ID
fakelD01
fakelD02
fakelD03

Contacts found 3

Unique ID	First Name	Last Name	Spelling Bee Rank
stu1054491	Sprague	Aaliyah	2nd
stu1081975	Dube	Abbigail	1st
stu1057961	Seals	Adamski	3rd

If the data falls under the correct field, click **Add Selected Recipients** to proceed. In the example above, these 3 recipients and the custom data their student IDs are mapped to are now added the broadcast.

If the Data is not Falling Under the Correct Field...

Your **.CSV file may not be formatted correctly**. For example, if you have an empty column in your custom data CSV. file, the system will not connect the data with the correct field.

	A	B	C
1	stu1054491		3rd
2	stu1081975		1st
3	stu1057961		2nd

Contacts found 3			
Unique ID	First Name	Last Name	Spelling Bee Rank
stu1054491	Sprague	Aaliyah	
stu1081975	Dube	Abbigail	
stu1057961	Seals	Adamski	

Check to make sure you have the data under the corresponding column that the field is mapped to in your CSV. file. For example, when the extended field import for **Spelling Bee Rank** was created, we mapped the spelling bee field to column 2. So the .CSV file will need to have the spelling bee ranks under column 2 to fall under that field (column 2 = column B in the .CSV file, column 3 = column C in the .CSV file etc).

In the example below, for this extended field import, we've mapped the spelling bee rank to column 3, and another field (X_Test) to column 2.



The custom data import will need to follow this format in order for the data to fall under the correct fields:

A	B	C
stu1054491		3rd
stu1081975		1st
stu1057961		2nd

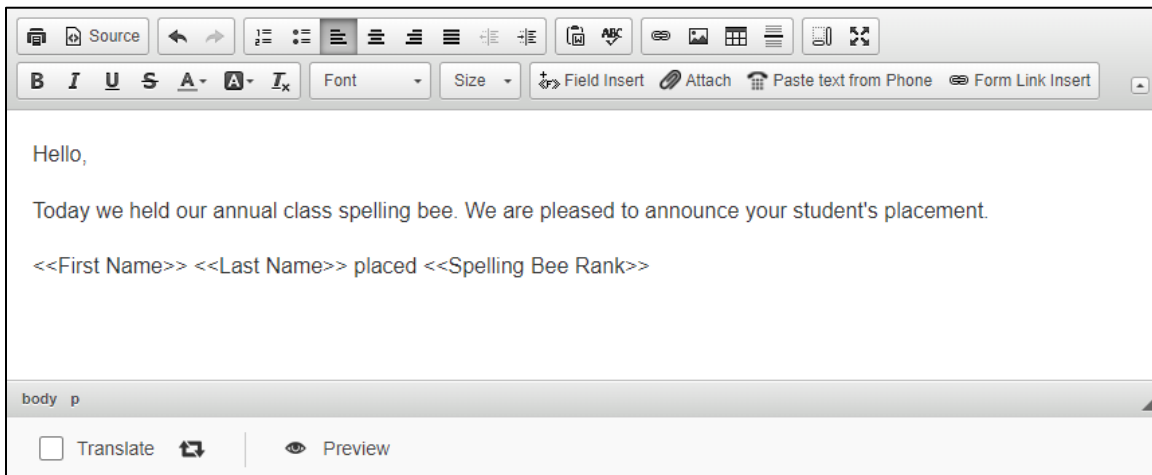
Contacts found 3

Unique ID	First Name	Last Name	X_Text	Spelling Bee Rank
stu1054491	Sprague	Aalyah		3rd
stu1081975	Dube	Abbigail		1st
stu1057961	Seals	Adamski		2nd

The Student IDs were not listed under column A in your .CSV file. Ensure that the student IDs are under column A in your .CSV file. If you list the student IDs under any other column, the other custom data will not fall under the correct field.

Using Custom Data Fields in a Broadcast

The user can now use the custom data in a phone, email, or SMS type message. Using the example of **Spelling Bee Rank**, when creating their message, they can reference the **Spelling Bee Rank** field from the **Field Insert** option under the message editor and add it to their message:



Questions?

If you have any questions regarding the above, please contact support.

SchoolMessenger Solutions Support

Phone: 800-920-3897

Email: support@schoolmessenger.com