

## Terra Dotta: Maintenance > Data Import/Export

### Application Data Template

The following table provides a reference to the data fields provided in the Application Data Template, the required data types, default values (if any), whether or not each field is required, and a short description of what each field represents.

#### IMPORTANT REMINDERS:

- The application import does **not** create application itinerary records for new applications.
- The application import does not create a 'profile' for new users, therefore new users imported via an application import will not immediately be found when searching for profiles. In order to find these users in a profile search, TDS or the applicant must interact with their profile so that a profile status is assigned. If applicants will be logging in to access their applications, they will have profile statuses set automatically at that time. Alternatively - or if they will not be logging in – an admin can set a profile status by following these steps:
  - Create a temporary 'Yes/No' applicant parameter. ○ Search for all applications that were imported and use 'Batch Info Edit' to assign a value for this parameter [this action sets the profile status].
  - Delete the parameter.
- When updating existing applications, an Application ID is required. When importing new applications, there will be no Application ID.
- Always run a test import with a small sample set of rows before importing a large file.
- Do not double-click the 'Import/Update Data' button or your request may be processed twice resulting in duplicate applications.
- Completely remove any columns labeled 'Optional' if you do not intend to use them. Required Columns must be included even if no changes are being made to those values.
- Use 'clean' text, meaning no extraneous pipe characters, tab characters, return carriages, etc.
- Do not alter the name of the columns; they must remain exactly as they are in the data template produced under Maintenance -> Data Import/Export.
- Files should be saved as tab delimited .txt -- OS X(Mac) users should save import files from Excel as 'Windows Formatted Text (txt).'
- Enable Import/Export permissions only for qualified, experienced administrative users who have read and understood the documentation.

## Application Data Template

Column Header	Importing NEW applications	Updating EXISTING applications	Value Type	Additional Information
Application ID	NO	REQUIRED	Numeric	When provided, the ID value must represent a valid, existing application. An existing application will be updated during the import only if the Application ID is provided in the import file. When not provided, a NEW application will be created for the user.
Storefront ID	NO	NO	Numeric	Storefront ID is a deprecated feature and is not recommended for use. This column can be deleted from the import file.
Program ID	REQUIRED <i>(Leave blank only if importing advising applications)</i>	Optional	Numeric	When provided, Term and Year are also required. If there is no application ID or program ID, an advising application will be created.
First Name	REQUIRED	REQUIRED	String (30 characters max)	

<b>Middle Name</b>	Optional	Optional	String (50 characters max)	
<b>Last Name</b>	REQUIRED	REQUIRED	String (50 characters max)	
<b>E-mail</b>	REQUIRED	REQUIRED	String (253 characters max)	Enter only one e-mail address in this column
<b>CC E-mail</b>	Optional	Optional	String (253 characters max)	Enter only one e-mail address in this column
<b>DOB</b>	Optional	Optional	Date (MM-DD-YYYY format)	
<b>Gender</b>	Optional	Optional	String (M for 'male'; F for 'female'; O for 'other')	

<b>Username (UUUID)</b>	REQUIRED	REQUIRED	String (253 characters max)	<p>Login username of applicant. For non-SCL users, this value will be the full e-mail address.</p> <p><b>IMPORTANT NOTE: If the UUID is a number that starts with zero(s), take extra precautions to ensure Excel does not strip out the leading zero(s) before the file is imported. This will result in duplicate user records and/or duplicate applications. Please open a case if you need assistance.</b></p>
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<b>External Flag</b>	Optional <i>Default: See notes in additional info column</i>	Optional	Numeric (0 for 'internal'; 1 or null for 'external')	When importing new applications: If the 'External Flag' column is completely removed from the file, users will be Internal by default. If the 'External Flag' column is included in the import file, but has a null value, users will be External.
<b>Integrated Flag</b>	Optional <i>Default: Non-Integrated</i>	Optional	Numeric (0 or null for 'nonintegrated'; 1 for 'integrated')	Unless indicated that a new applicant is 'integrated' they will be created as 'non-integrated' via the import tool. When importing new applications for integrated users, this column must be included with a value of 1. When updating applications for integrated users, this column should be present with a value of 1, or omitted completely. If the column has a value of 0, or an empty/null value, the user will be considered non-integrated.
<b>Confidentiality Indicator</b>	Optional <i>Default: Not Confidential</i>	Optional	String (Y for 'confidential'; N or null for 'not confidential')	
<b>Home Institution FSC Code</b>	Optional	Optional	String (6 characters max)	When provided, it must be a valid Federal School Code (FSC). Take extra precautions to ensure Excel does not strip out the leading zero(s) before the file is imported.
<b>Other Home Institution</b>	Optional	Optional	String (200 characters max)	The full text name of the home institution. May be used as an alternative to FSC codes but is non-standard which prevents easy lookup/queries. If both the FSC Code and text name are provided, the text name will be reflected on the applicant's profile.

<b>Partner Institution</b>	Optional	Optional	String (200 characters max)	Value must be an <i>exact</i> match to a Partner Institution already listed under System Settings -> Partner Institutions.
<b>Term</b>	REQUIRED <i>(Leave null for advising applications)</i>	Optional <i>(Required if Program ID is provided)</i>	String (20 characters max)	If the value is an <i>exact</i> match to a term already created in your site, the term of the application will connect with the existing term. If the value is not already a term on your site, a new term will be created.

<b>Year</b>	REQUIRED <i>(Leave null for advising applications)</i>	Optional <i>(Required if Program ID is provided)</i>	Numeric (must be exactly 4 digits)	A new application cycle will be created if the term/year combination for the application isn't already an existing application cycle.
<b>Dual Year Term</b>	Optional <i>Default: single year</i>	Optional	Numeric (0 or null for 'single-year'; 1 for 'dual-year')	The dual-year flag makes application cycles appear in the format of 'Academic Year 2015-2016' instead of 'Academic Year 2015'. The dual-year or single-year flag designation from an import overwrites the term standard setting. If you are importing terms that should be displayed as 'dual-year' this column must be included in the import file with a value of 1. Otherwise, it will display as a single year even if the term is configured as dual-year under System Settings -> Terms.
<b>Non-processed</b>	Optional <i>Default: Processed</i>	Optional	Numeric (0 or null for 'processed'; 1 for 'non-processed')	A non-processed application is for record keeping purposes only. The applicant receives no system generated email notifications and is not intended to login to the site to view their application(s). Usually, applications are imported as 'processed'.

<b>Exchange weight</b>	Required <i>Default: no exchange weight</i>	Required	Numeric (8 character max)	The import allows up to 8 characters, but only 2 characters after a decimal point will be reflected on the application. Currently, importing the exchange weight doesn't change the exchange status of an application – the admin will still need to flag application(s) as exchange. NOTE: If you do not want to indicate an exchange weight, you can simply leave this column blank, however, it must still be included in the import file in order for the import to be successful.
<b>Status</b>	REQUIRED <i>(If no program ID is provided, the status must be advising.)</i>	REQUIRED <i>(If no program ID is provided, the status must be advising.)</i>	String	Status aliases cannot be imported. Acceptable values include: advising, pending, accepted, committed, waitlist, withdrawn, rejected

<b>App Creation Date</b>	Optional	Optional	Date (MM-DD-YYYY format)	When importing new applications: If no app creation date is provided, the app creation date will change to today's date When updating applications: If the column is excluded completely from the import file, the app creation date will retain its current value. If the column is present but with a null value, the app creation date will change to today's date. Applications cannot be imported with an app creation date in the future.
<b>Principal</b>	Optional	Optional	Numeric	If provided, the ID value must represent a valid, existing application that will be assigned as the principal application.

<p><b>Applicant Param:</b> [AP#XXXXXX]<sup>1</sup></p>	<p>Optional</p>	<p>Optional</p>	<p>String (The formatting depends on the applicant parameter type and should follow the descriptions in the next column.)</p>	<p><u>Field:</u> Any string up to 500 characters.  <u>Single Selection:</u> Any string up to 500 characters. Only values that are an <i>exact</i> match to existing picklist options will be searchable. Importing a value that is not a picklist option results in that value appearing on the profile, but not being created as a new picklist option to be used on other applicant profiles.  <u>Multiple Selection:</u> Any string up to 500 characters. Only values that are an <i>exact</i> match to existing picklist options will be searchable. Importing a value that is not a picklist option results in that value appearing on the profile, but not being created as a new picklist option to be used on other applicant profiles. Multiple picklist values can be imported by entering a pipe character   between values. For example – multiple responses for the applicant parameter ‘Allergies’ can be imported as: Animal Dander Peanuts Seafood  <u>Validation:</u> Any string up to 500 characters. Only values that are an <i>exact</i> match to existing response options will validate the applicant and allow them to pass through to the application page.  <u>Yes/No:</u> Only values of Yes or No  <u>Date:</u> Must be in date format DD-MMM-YY. If text is imported, the parameter will not display the text, but instead display a date of 01/01/1900.  <u>Number:</u> Must contain only numeric characters and decimal points. Follow the length limitations configured for the parameter.  <u>File:</u> Values for the file type applicant param cannot be imported.</p>
<p><b>Application Tags</b></p>	<p>Optional</p>	<p>Optional</p>	<p>String (100 characters max)</p>	<p>If the imported tag is not an exact match to a tag that already exists on the site, a new tag will be created under System Settings -&gt; Application Tags. Multiple tags can be imported by entering a pipe character   between values. For example: Tag1 Tag2 Tag3</p>

<p><b>Applicant Address:</b> [AD#XXXXXX]<sup>2</sup></p>	<p>Optional</p>	<p>Optional</p>	<p>String  <u>100 characters max:</u>  Line 1, Line 2, Line 3,  Province, Country,  Addressee,  Relationship  <u>50 characters max:</u>  City, Zip/Postal Code,  Latitude (numeric),  Longitude (numeric)  <u>20 characters max:</u>  Phone, Fax, Mobile  <u>2 characters max:</u>  State</p>	<p>When importing addresses, any address field not included in the import file will result in a null value. For example, if an address already has Line 1, City, State, and Zip and the import is being used to add Addressee and Relationship – Line 1, City, State, and Zip will be nulled out if only Addressee and Relationship are included in the import file. In a situation like this, the full address information (Line 1, City, State, Zip, Addressee, and Relationship) would need to be included in the import file to ensure no data is nulled out.</p>
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<p><b>Questionnaire Response:</b> (Question Item) [Q#XXXXX-YYYY]<sup>3</sup></p>	Optional	Optional	String (The formatting depends on the question item type and should follow the descriptions in the next column.)	<p>Pipe characters   should only be used when importing multiple values. Do not use pipe characters for importing essay responses or other text strings because only the content after the pipe character will be imported.</p> <p>The import tool can be used to import question item values only if the questionnaire has not yet been saved or submitted. Once a questionnaire is saved or submitted, none of the question items in that questionnaire can be updated via the import feature, even if an individual question within the questionnaire currently has no value. When one or more question items have a response value entered via the import tool, the questionnaire is marked as submitted. There is no log in the application history of the questionnaire submitted date.</p> <p><u>Single Selection:</u> Cell value will be imported as a single value. Importing a value that is not a picklist option results in that value appearing in the application and being searchable, but not being created as a new picklist option to be used by other applicants.</p> <p><u>Multiple Selection:</u> Importing a value that is not a picklist option results in that value appearing in the application and being searchable, but not being created as a new picklist option to be used by other applicants. Multiple picklist values can be imported by entering a pipe character   between values. For example – multiple responses for the question item ‘Languages Studied’ can be imported as: Spanish French Thai</p> <p><u>Short Description:</u> 4,000 characters or less <u>Field:</u> 200 characters or less</p>
				<p>Essay: String – ‘clean’ content only – certain extraneous characters can cause the import to fail or incomplete values to be imported. Yes/No: Only values of Yes or No</p>

				<p>Yes/No with explanation for Yes: Value should be No or the explanation for Yes. Anything other than a value of No will result in Yes being selected, plus the value of the cell entered as the explanation text. If the answer is Yes, it is not necessary to include 'Yes' in the value – just enter the explanation text and Yes will be selected automatically.</p> <p>Yes/No with explanation for No: Value should be Yes or the explanation for No. Anything other than a value of Yes will result in No being selected, plus the value of the cell entered as the explanation text. If the answer is No, it is not necessary to include 'No' in the value – just enter the explanation text and No will be selected automatically.</p> <p>Date: Must be in date format DD-MMM-YY</p> <p>Rating: Value can be N/A or numeric to represent the number of stars. The highest number is the 'Max # of stars for rating questionnaires' configured under System Settings -&gt; System Features -&gt; Programs tab. If any other value is imported, it will appear as a response in the questionnaire but will not be searchable. <u>Review</u>: 4,000 characters or less</p>
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<sup>1</sup>**Applicant parameter** column headers are formatted as **Applicant Param [AP#XXXXX]** where Applicant Param is the name of the parameter and XXXXX is the numeric identifier of that parameter. An example might look like – **Citizenship [AP#12]**. The export template will supply the header information for all applicant parameters currently in the system.

<sup>2</sup>**Applicant address** column headers are formatted as **Applicant Address: FIELD [AD#XXXXX]** where Applicant Address is the name of the address parameter, FIELD is the specific field within the address, and XXXXX is the numeric identifier of that address parameter. There are 15 columns (fields) for each address parameter: Line 1, Line 2, Line 3, City, State, Province, Zip/Postal Code, Country, Phone, Fax, Mobile, Addressee, Relationship, Longitude, and Latitude. An example might look like - **Emergency Contact: Line 1 [AD#3]** for the Line 1 column of the Emergency Contact address parameter. The export template will supply the header information for all address types currently in the system.

<sup>3</sup>**Questionnaire response** column headers are formatted as **Questionnaire Response (Question Item) [Q#XXXXX-YYYYY]** where Questionnaire Response is

the title of the questionnaire, Question Item is the title of the question item in that questionnaire, XXXXX is the numeric identifier of the questionnaire, and YYYYY is the numeric identifier of the question item. An example might look like – **Housing Preference (Do you want a roommate?) [Q#3-7]**. The export template will supply the header information for all questionnaires currently in the system.