

Terra Dotta: Maintenance > Data Import/Export Profile Data Template

The following table provides a reference to the data fields provided in the Profile 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:

- ✦ 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.
- ✦ 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.

Profile Data Template

Column Header	Importing NEW profiles	Updating EXISTING profiles	Value Type	Additional Information
User ID	Optional	Optional	Numeric	When provided, the ID value must represent a valid, existing user.
First Name	REQUIRED	REQUIRED	String (30 characters max)	
Middle Name	Optional	Optional	String (50 characters max)	
Last Name	REQUIRED	REQUIRED	String (50 characters max)	
E-mail	REQUIRED	REQUIRED	String (253 characters max)	Enter only one e-mail address in this column
CC E-mail	Optional	Optional	String (253 characters max)	Enter only one e-mail address in this column
SMS E-mail	Optional	Optional	String (253 characters max)	Enter only one e-mail address in this column. Must be a valid e-mail address. SMS phone number is currently not part of the import tool.

DOB	Optional	Optional	Date (DD-MMM-YY format)	
Gender	Optional	Optional	String (M for 'male'; F for 'female'; O for 'other')	
Username (UUUID)	REQUIRED	REQUIRED	String (253 characters max)	Login username of applicant. For non-SCL users, this value will be the full e-mail address. 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. Please open a case if you need assistance.
External Flag	Optional <i>Default: Internal</i>	Optional	Numeric (0 or null for 'internal'; 1 for 'external')	Unless indicated that a new user is 'external' they will be created as 'internal' via the import tool. When importing new profiles for external users, this column must be included with a value of 1. When updating profiles for external 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 internal.
Integrated Flag	Optional <i>Default: Non-Integrated</i>	Optional	Numeric (0 for 'non-integrated'; 1 for 'integrated')	Unless indicated that a new user is 'integrated' they will be created as 'non-integrated' via the import tool. When importing new profiles for integrated users, this column must be included with a value of 1. When updating profiles 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.
Confidentiality Indicator	Optional <i>Default: Not Confidential</i>	Optional	String (Y for 'confidential'; N for 'not confidential')	
Home Institution FSC Code	Optional	Optional	String (6 characters max)	When provided, it must be a valid Federal School Code (FSC).

Other Home Institution	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.
Partner Institution	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.

Profile Status	REQUIRED	REQUIRED	String (20 characters max)	Value must be an <i>exact</i> match to one of the following: Complete, Inc: Non-required, Inc: Required <u>Complete</u> - This status means that <i>all</i> applicant parameter and address information has been provided <u>Inc: Required</u> - This status means the applicant is missing some required applicant parameter or address information <u>Inc: Non-required</u> - This status means the applicant has provided all of the required applicant parameter/address information, but they have not provided information for all of the non-required parameters/addresses
Profile Creation Date	Optional <i>Default: Today's Date</i>	Optional	Date (DD-MMM-YY format)	
Profile Last Update Date	Optional <i>Default: Null</i>	Optional	Date (DD-MMM-YY format)	
Saved Programs	Optional	Optional	String (2000 characters max)	The list of programs the user has saved to his/her profile. Semi-colon delimited list of program ID #'s.
Principal	Optional	Optional	Numeric	If provided, the ID value must represent a valid, existing profile that will be assigned as the principal profile.

<p>Applicant Param: [AP#XXXXXX]¹</p>	<p>Optional</p>	<p>Optional</p>	<p>String (The formatting should be based 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>
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Applicant Address: [AD#XXXXX] ²	Optional	Optional	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</u> <u>characters max:</u> Phone, Fax, Mobile <u>2</u> <u>characters max:</u> State	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 is 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.
Bio	Optional	Optional	String (2000 characters max)	The bio entered by the applicant as part of the profile

¹**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.

²**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.