Creating Import File Template

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Import file templates enable you to import data from a file into the system to either create new records or update existing records in the software. The File Types available to import include .txt, .xlsx, and .csv. The data in the file will be mapped to Objects and Fields you specify in order to connect where the information will be stored in your database. For example, when setting up a new database, you may have a file containing ZIP codes your users will be expected to use. You can create an import file template to import the data from the ZIP code file to create ZIP code records in the software automatically, rather than manually adding them.

If you need to create an import file that is similar to an existing template, you can clone the existing template instead of manually creating a new one. You may need to create cross references for the import file and update the actions for the import after your import file template and source values are created.

Only users with training and programming experience should create their own import file templates. In order to create import file templates, users must consent to the Import Designer Agreement every 60 days.

Listed below are the sections for creating an import file template.

- Creating Import File Templates
- Creating Source Values

1. To create an import file template, complete the following sub-steps.

    > **Step Information**
    >
    > You can create import file templates to determine how data from a file will be imported into your software. When you create an import file template, you must identify the File Type and indicate the primary object the data will be imported into.

    a. Select ☰ > **Administrative Access** > **System**.

    b. Select **Import Designer** under *Features.*

    > **Expected Result**
    >
    > You see the *Import Designer*, which displays existing import file templates.

    c. Click **Add Import** near the top right of the screen.

    > **Expected Result**
    >
    > You see the *Add Import* screen.

d.   **!**   Note: The Import Designer Agreement displays if you have not consented within the last 60 days. You must consent to the agreement before you can continue with this process.

After reviewing the Import Designer Agreement, click **I Consent** near the bottom right of the window.

Step Information

Only users with training and programming experience should create their own import file templates. Each user must indicate their consent for the Import Designer Agreement every 60 days.

e. Enter a Name to identify the import file template.

Step Information

For example, if you are creating an import file template to import an initial list of ZIP codes for your organization, you could enter ZIP Codes. You could enter Journal Entry Details if you are creating an import file template to import journal entry details.

f. Enter a Description to further define the import file template if appropriate.

Step Information

For example, you could indicate the import file template is used to import the initial list of ZIP codes for your organization's database.

g. Enter the Module or click the ⌄ icon to choose from the drop-down list, if appropriate.

Step Information

This is the folder in which the primary object where you wish to import the data is stored. For example, if you are creating an import file template to import ZIP codes, which are located in the *Demographics* module, you would select Demographics. In a situation where you are creating an import file template to import journal entry details, you would select Account since journal entry details are found in the *Account* module.

h. Enter the Object or click the ⌄ icon to choose from the drop-down list.

Step Information

The objects available for selection depend on the module that was selected. This is a data table in which the columns consist of fields and rows consist of records of data. You must select the lowest child object, which is the most detailed record that will be imported. For example, if you are

creating an import file template to import ZIP codes, you can select Zip as the object. You would select JournalEntryDetails if you are creating an import file template to import journal entry details.

It is best practice to identify the base object's scope to determine whether importing information into the fields attached to the base object will update these fields within the entire system or from just your District. This is important information to have just in case you wish to either efficiently import system-wide information, or to ensure that the import will only update information for a specific district.

i. Choose the appropriate File Type from the drop-down list.

Step Information

For example, you could select Excel if the data should be imported using .xlsx or .csv file types.

Expected Result

If you selected CSV/Delimited, the Delimiter and Text Qualifier fields display. Continue to the next sub-step.

If you selected Excel or Fixed Width, continue to sub-step m.

j. Choose the appropriate Delimiter from the drop-down list.

Expected Result

If you select Custom, the Custom Delimiter field displays. Continue to the next sub-step.

If you select Comma, Tab, Pipe, Space, or Semicolon, skip to sub-step l.

k. Enter a Custom Delimiter.

l. Choose the appropriate Text Qualifier from the drop-down list.

m. Uncheck the box for File has Header Row if appropriate.

Step Information

This box defaults to checked, but can be unchecked if necessary.

n. Choose the appropriate Date Format from the drop-down list.

o. Click 💾 near the top left of the screen to save your work.

Expected Result

You see the *General* tab of the *Import Designer Details* screen for the import file template you created.

You have successfully created an import file template.

2. To create source values, complete the following sub-steps.

Creating source values enables you to indicate where various information needed for the import should pull from, such as from the import file or from a prompt users complete as they process the import. You can quickly create source values from any delimited or excel file by using the Build from File option. You must create source values for each column in the import file that you plan to import data from. You can also create source values to be used as prompts, specified values, or data object sources at this time, but Skyward recommends creating these types of source values when you create field mappings. If you are continuing this process from the previous section, skip to sub-step e.

a. Select ☰ > **Administrative Access** > **System**.

b. Select **Import Designer** under *Features*.

Expected Result

You see the *Import Designer* screen, which displays existing import file templates.

c. Click the ➲ icon to the left of the import file template you wish to create source values for.

Expected Result

You see the *General* tab of the *Import Designer Details* screen.

d. ❗ Note: The Import Designer Agreement displays if you have not consented within the last 60 days. You must consent to the agreement before you can continue with this process.

After reviewing the Import Designer Agreement, click **I Consent** near the bottom right of the window.

Step Information

Only users with training and programming experience should create their own import file templates. Each user must indicate their consent for the Import Designer Agreement every 60 days.

e. Select the **Source Values** tab at the left of the screen.

Step Information

If your import file is a delimited or excel file, you can create source values based on columns in the file.

If you wish to build from a file, continue to the next sub-step.

If you do not wish to create source values from a file, skip to [sub-step j](#).

You see existing source values for the import file template.

f. Click **Build from File** near the top right of the screen.

You see the *Build from File* screen.

g. Click the ⬆ icon and select the file you wish to upload.

The file you choose to build from must be a .csv or excel file.

You see a checkmark indicating the upload was successful.

h. Uncheck the box for File Has Header Row if necessary.

If the box is unchecked, the source values created will be given a generic name. For example, the first two columns would be named Column A, and Column B.

If the box is checked, the source values created will be given a name matching the value for the column in the first row of the file. For example, if the first two columns have the values of First Name and Last Name in the first row, the source value for the first column will be named First Name, and the source value for the second column will be named Last Name.

i. Click 💾 near the top left of the screen to save your work.

If there is an existing source value, it will be replaced with the new source values from the uploaded file.

You see the uploaded source values and their file names under the *Source Values* heading.

No further steps are required.

j. Click **Add Source Value** near the top right of the screen.

You see the *Add Source Value* screen.

k. Enter a Name to identify the source value.

Step Information

For example, if you are adding a source value for an import file template for ZIP codes, you could enter Zip. You could enter Journal Entry Details if you are adding a source value for an import file template for journal entry details.

l. Verify File is selected for the Source Type or select File from the drop-down list if necessary.

Step Information

At this point in creating your import file template, Skyward recommends only creating source values with a source type of File. You must create a source value for each column in your file that you plan to import data from.

If you are adding a source value for an import file template with a File Type of Excel or CSV/ Delimited, continue to the next sub-step.

If you are adding a source value for an import file template with a File Type of Fixed Width, skip to sub-step n.

m. Enter the appropriate Column value.

Step Information

This is the column in the file the source value will pull from. You must enter the appropriate number or letter associated with the column. For example, to pull the second column of the file, you would enter B or 2.

Skip to sub-step p.

n. Enter the Start Character Position.

Step Information

This field only displays when the File Type of the template is set to Fixed Width.

o. Enter the Width in Characters.

This field only displays when the File Type of the template is set to Fixed Width.

p. Choose one of the options near the top left of the screen to save your work.

Option	Description
Save & Add Another	Saves the source value you created and refreshes the screen so you can add another.
Save	Saves the source value you created and you return to the *Source Values* tab of the *Import Designer Details* screen, which displays the source value you added.

Expected Result

You have successfully created a source value.

You have successfully created an import file template.

- You must create [field mappings](#).