

Fast•Class File

Client Data System

Volume 30: Importing Group Census Data

Before data can be entered into the **Group Census** tab of a business record, it must be organized in a file format that can be interpreted by CDS. One file type that CDS can read is Comma Separated Value or .CSV. Microsoft Excel can be used to format data and save it in .CSV file format.

Once the data has been organized and saved in .CSV format, you can create an import definition to bring the data into the group census of a business record in CDS.

To import data directly into the **Group Census** tab of a business record –

- From the main screen of CDS, click on the **Business** button and perform a search for the selected business.
- With the selected business record in focus, click on the **Group Census** tab.
- With the **Group Census** tab selected, click on the **Tools** menu and then select **Import Census Names**.



Figure 1: The Tools menu of the Group Census tab with the Import Census Names tool selected.

Note: It is important to use the **Import Census Names** tool to import contacts to the Group Census tab of a business record for two reasons:

1. The **Import Census Names** tool creates a link between imported contacts and the selected business.
2. There are unique group census columns that are only available for import when using the **Import Census Names** tool.

After selecting **Import Census Names** from the **Tools** menu –

- Click the **Add** button in the **Import/Export Definitions** window.

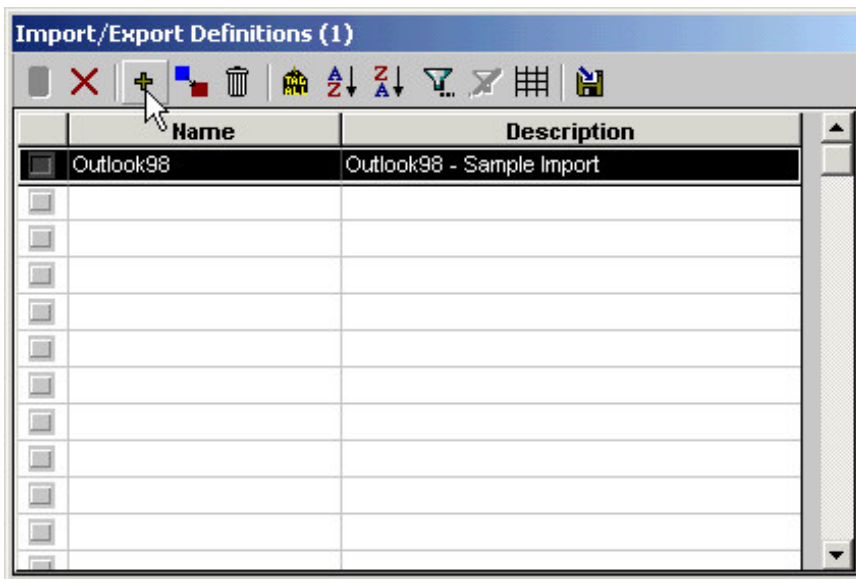


Figure 2: The Import/Export Definitions window.

- Select the **Comma Separated Value** option in the **Import/Export Selection Type** window.

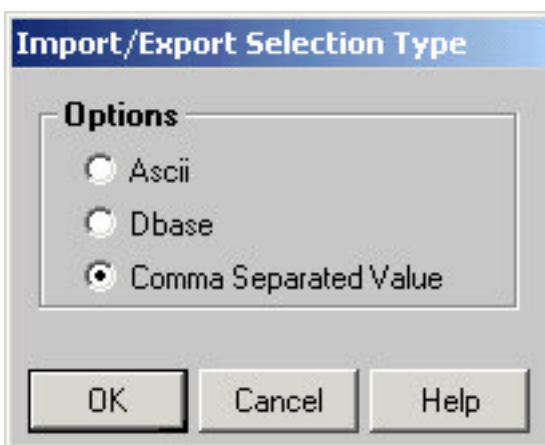


Figure 3: The Import/Export Selections Type window.

In the Import/Export Definition window, move columns out of the Columns Available section into the Columns Selected section in accordance with the order of columns in the .CSV file.

	A	B	C	D	E	F	G	H	I
1	Last Name	First Name	Gender	Marital	Compensatic	Hire Date	Pre-ex	DOB	Age
2	Roberts	Randy	Male	Married	45,000	10/1/1997	Diabetic	8/16/1965	38
3	Humphries	Kay	Female	Married	60,500	4/23/1986		6/22/1974	29
4	Bingman	Harold	Male	Single	75,000	3/15/1999		9/1/1960	43
5	Vasquez	Paul	Male	Married	55,000	1/24/1998		10/7/1978	25
6	O'Reily	Kate	Female	Single	40,000	3/27/2003		6/27/1980	22
7	Chang	Martha	Female	Married	43,000	7/12/2001		4/16/1969	34

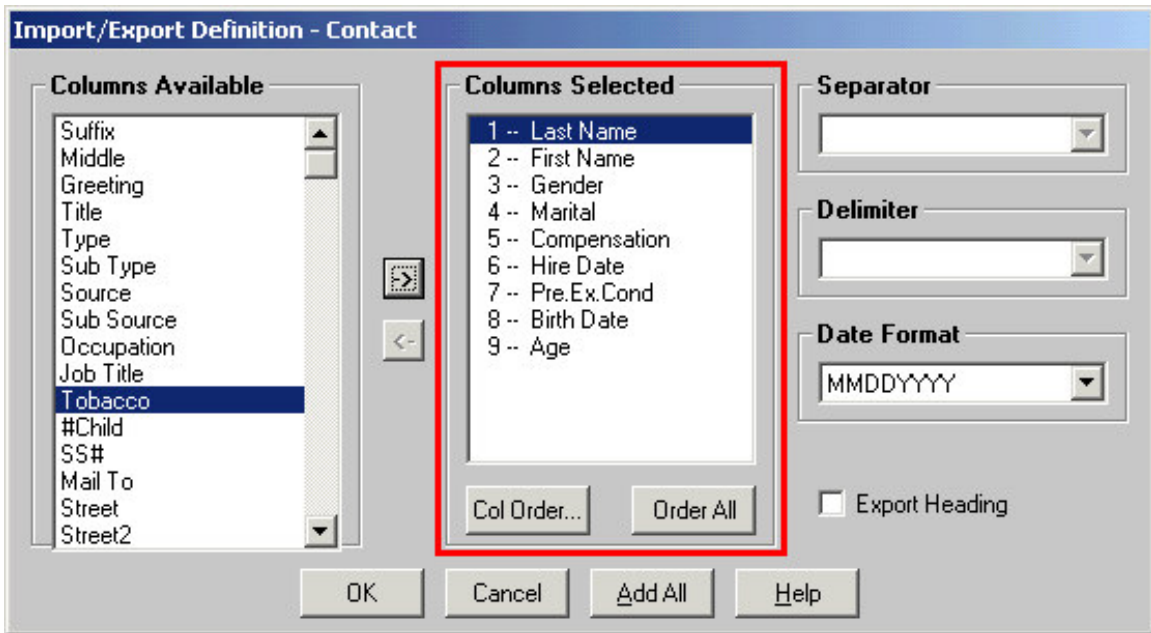


Figure 4: .CSV file column organization and corresponding import map in the Import/Export Definition – Contact window.

Moving columns into the **Columns Selected** section creates a map for CDS to follow when importing data. The number preceding a column entry indicates which column in the .CSV file CDS will pull data from for the selected column. For example, the first entry in the **Columns Selected** section, **1 – Last Name**, indicates that data in the first column of the .CSV file will be entered in the **Last Name** column of the Group Census contact record. Note that in this example, the entries in the **Columns Selected** section match the organization of columns in the .CSV file.

- When column mapping is completed, click **OK**.
- Give the import definition a name in the **Name** field and click **OK**.
- Select the newly created import definition in the **Import/Export Definitions** window and click the **Import** button.

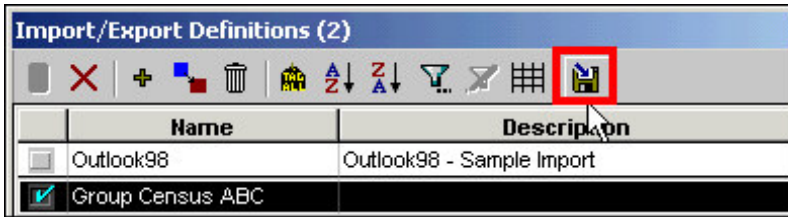


Figure 5: The Import button in the Import/Export Definitions window.

- Select import options in the **Contact/Business Import Options** window.

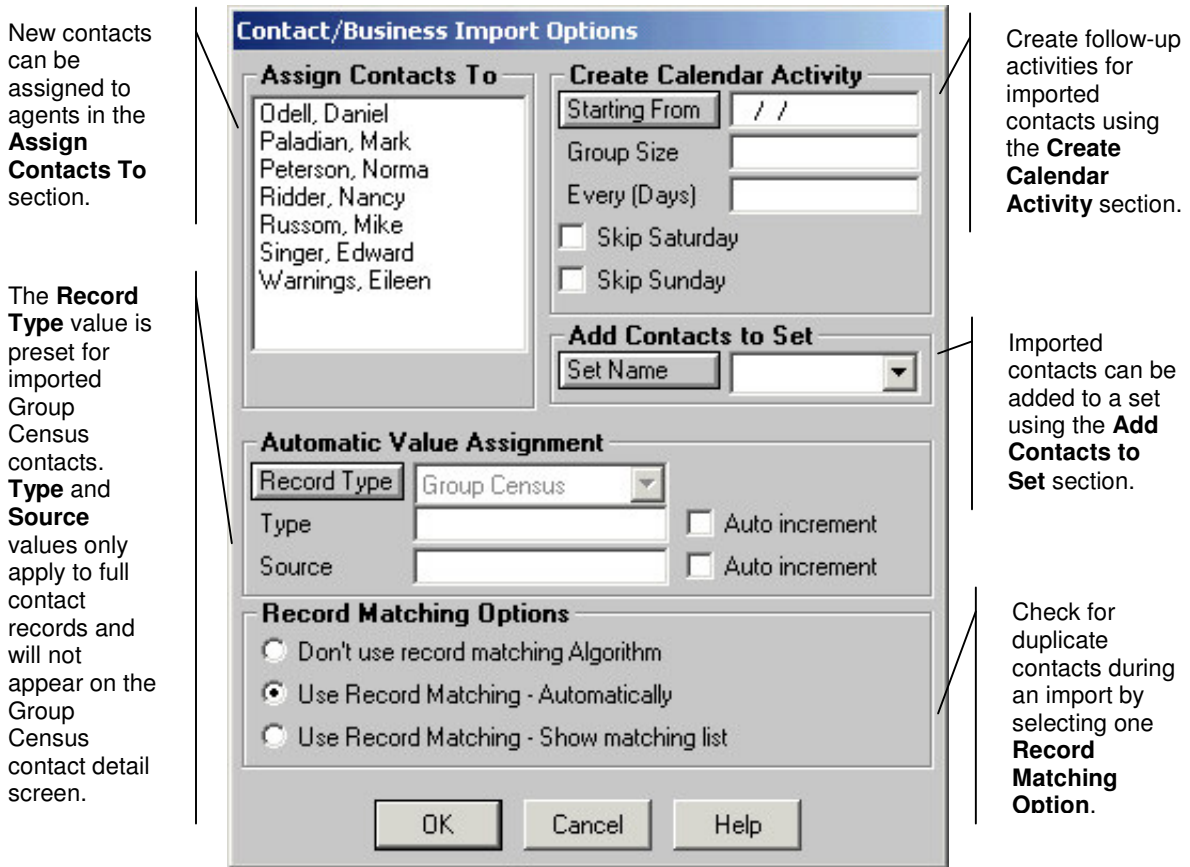


Figure 6: The Contact/Business Import Options window.

- After selecting import options, click **OK**.

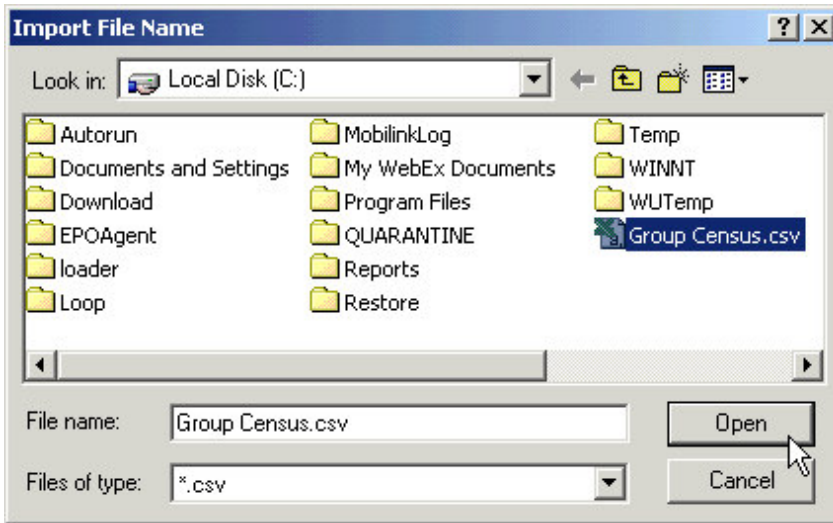


Figure 7: The Import File Name window.

- Find the file with data to be imported in the **Import File Name** window and click **Open**.
- CDS will display a thumbnail preview of the import.

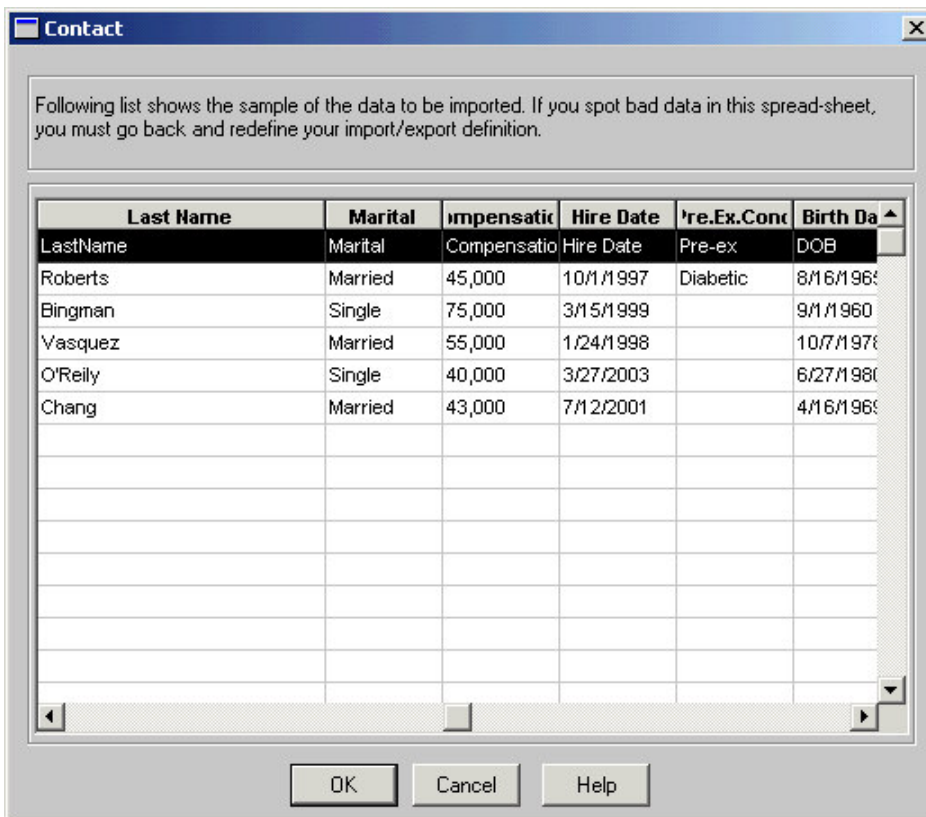


Figure 8: Preview of the newly created group census import.

- Verify that the import definition has been mapped correctly. If the mapping needs to be redone, click the **Cancel** button and set up the import definition correctly. If the mapping is correct, click **OK** to perform the import.

Contacts added to the **Group Census** tab of a business will appear in blue in the **Group Census** summary spreadsheet.

Group census contacts (listed in blue) are different from full contact records (listed in black). Group census contact records do not normally display in the contact record summary screen, sets, or dynamic reports unless the option has been turned in on the **Contact Record** tab of the User Preferences.

To promote a group census only contact record to a full contact record –

- Select the group census contact record by tagging the record.
- Click the **Convert to Contact** Button.

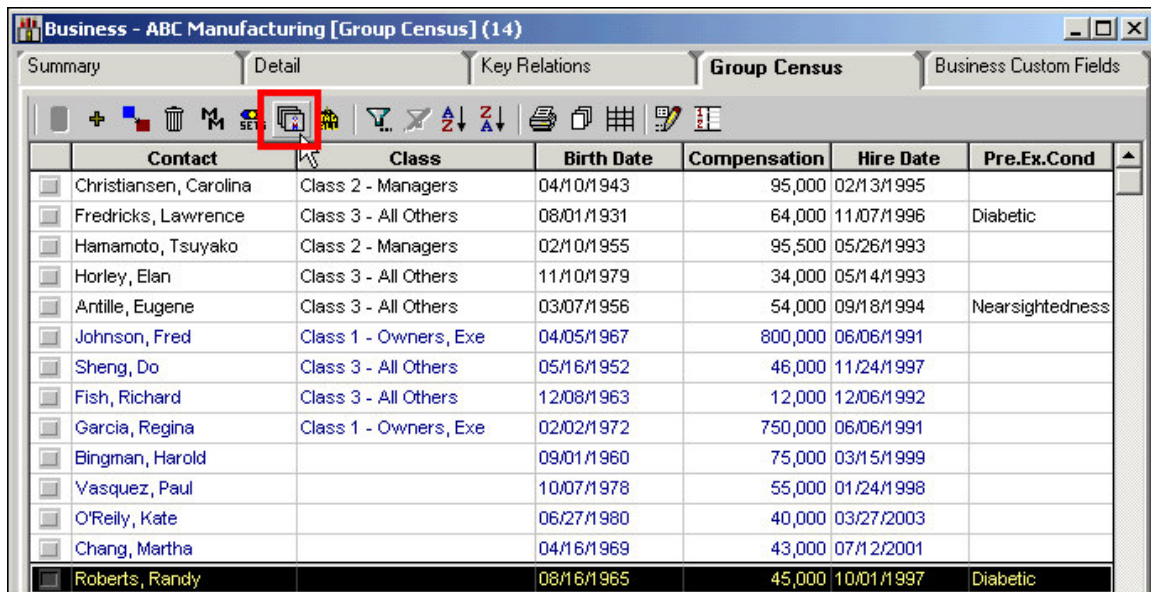


Figure 9: The Convert to Contact button on the Group Census tab toolbar.

To view or modify the detail screen of a group census contact record –

- Double click on the selected contact record on the **Group Census** tab.
- Make changes as needed in the **Group Census** contact detail screen.

Group Census [X]

Personal Information		Spouse Information	
Contact	Bingman, Harold	Last/First	
Last Name	Bingman	Birth Date/Age	/ /
First Name/MI	Harold	Tobacco/Gender	
Title		SS#	- -
Birth Date/Age	09/01/1960 43	Misc. Information	
Tobacco/Gender		Alphanum1	
Marital/Children#	Single	Alphanum2	
Phone	() - - #	Cobra Beg/End	/ / / /
Job Title		Pre.Ex.Cond	
Key Employee	<input type="checkbox"/>	Remarks	
Hire Date/Class	03/15/1999		
Compensation/SS#	75,000 - -		

OK Cancel Help

Figure 10: The Group Census contact detail screen.