

Data Import
User Guide

SmartOffice®



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918 E. Green Street

Pasadena, CA 91106

Web: <http://www.ez-data.com>

Telephone: (626) 585-3505

Fax: (626) 585-3523

U.S. toll-free fax: (800) 779-3123

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Introduction

A contact management system is only as valuable as the contacts and data present. If the required contacts are spread across one or more systems, then the job of managing the data becomes a herculean task. The Data Import Wizard was created with understanding of the importance of this concept and knowing that some users may want to bring data into the SmartOffice® system from other data sources.

The Data Import Wizard walks the user through setting up of an import definition and data mapping. Users have the ability to import various types of contact and commission data. This document focuses on the basic contact imports. It will not address imports for Leads or Commissions, as these are addressed in module-specific user guides.

Requirements

The section discussing requirements for working with Data Import is broken down into the User Management/Security and Data Acquisition sections.

User Management/Security

A user wanting to import data must minimally be assigned the right of **Data Import** from the **User Roles/Licenses** tab of **User Management**. Additionally, it may be applicable to assign some additional roles to this user in order to facilitate the use and functionality of this module.

- **Data Import:** (Required)
- **Custom Screen Prompt Customization:** (Recommended) This enables the user to label customizable fields in the system and on the Custom tabs so additional data can be mapped for an import file
- **Choice Customization:** (Recommended) This enables the user to add custom choices to the Source field in the Data Import Wizard and Choice drop-downs throughout the system
- **Mass Operations:** (Consider the following roles to provide for data clean up after an import, or if a mistake was made)
 - **Mass Deletion:** This is helpful when contacts are imported incorrectly and the user wants to clean up the data by deleting the contacts and importing them again
 - **Mass Modification:** This enables a user to modify one or more fields one at a time, or for one or more tagged contacts from a spreadsheet view, and is helpful if there was an error during import for a limited number of fields/records
 - **Mass Assignments:** This enables the imported contacts to be reassigned to other users after data import
- **Advanced Contact Management Features:** (These roles are important in order to work with the data after it is imported)
 - **Convert Contact Type – Button:** This enables the conversion of potential duplicate contacts located through use of the Record Matching checkbox during import, to be merged if they are of different sub-system types
 - **Contact Merge – Button:** If potential duplicate contacts are located after the import, the contacts can be merged into one
- **Remove Functionality:** (These boxes should not be checked for a user who will perform data import functions)
 - **Remove Agent Sub-system Side Menu:** If the user will import either Agent or Agency records, uncheck this selection
 - **Remove ‘Set’ Functionality:** This must remain unchecked as contacts are automatically imported into a Set

Data Acquisition

The standard for data transfer between programs is the Comma Separated Value (CSV) format. Files saved in this format have the extension .csv. Most contact management programs can export data to this format (ACT, Goldmine, MS Outlook, etc.). Mailing List vendors can also supply data in this format. The separator for the data within the file can be specified during the time of import. If a particular data file is not in CSV format but is in Excel format instead, using the functionality built into Excel, the file can be converted to the correct format.

Besides the file type, it is also important to have the data formatted correctly within the file. If data is formatted correctly, then the import process is simplified and the results of an import require less clean up. The following items are important to consider when performing a data import.

- **Column Headings:** When these are present, it greatly enhances the accuracy of data mapping (It is highly recommended that column headings be included in all import files)
- **Name fields:** Last name, first name, etc. are separate fields in SmartOffice and should be separate fields in the data file, especially as the Last Name field is required for many of the import types
- **Address fields:** Two types of addresses can be imported, Residence and Business. The imported data cannot be in a single address block but must instead be broken up into Street [up to five (5) separate lines], City, State, ZIP Code and Country
- **ZIP Code fields:** Must either be five digits or nine digits with a dash (e.g., 91344 or 91344-3027)
- **Telephone fields:** These must be formatted with either parentheses or a hyphen separating the area code and a hyphen separating the prefix and suffix. The extension for business numbers must be separated by either a hyphen or a pound (#) sign (e.g., (626) 585-3505#820 or 626-585-3505-820)
- **Date fields:** It is recommended that all date fields contain a four (4) digit year to ensure the accuracy of the imported data
- **Mapping Type or Source field:** Because these fields are part of the definition of the import, they are not available for mapping. The user must sort the records and create different files if the Type or Source data is not uniform. Another option is to map this data to another field that will not be used during the import process. Then the data can be sorted with a filter and the applicable field can be mass modified with the correct selection
- **Number of fields:** 100 fields can be mapped and imported for a specific import setup
- **E-mail and Web site fields:** There is only one of each of these fields that can be imported per data record
- **Spousal Data fields:** If spousal data is present in the import file, the Spouse Last Name field is a required field for the import setup in order to import any additional spousal data. The Spouse First Name field will input the same data in both the First Name and Greeting fields.

Data Import Basic Workflow

Once a data file has been acquired in the proper format and the data within the file is consistent with the Data Acquisition requirements noted in the previous section, then the user is ready to proceed. If the user does not want to clean the data in the file but instead wants to wait until it is imported, then this is certainly an option but is not necessarily recommended. There are two important considerations that must be noted prior to importing data:

- All contacts are automatically assigned to the user who imported the data. The user must have the right of **Mass Assignment** in an office where security is enabled.
- When the contacts are imported, they are added to a system generated Set. The naming convention used to create this set is **office name_date** (e.g., corporate_11152005.) The date format utilized is the one designated in the **Office Settings, Date Format** field. If more than one file is imported on a particular day, then each subsequent file is appended with an incremented numerical value (e.g., corporate_111520051).

Data Import Wizard

The Data Import Wizard can be accessed from its entry on the side menu or as a drop-down in the Data Maintenance side menu if it is present. The existence of the Data Maintenance side menu option is controlled by additional roles, such as Data Validation. The initial spreadsheet view that opens when the Data Import Wizard is selected is the Import Setup List. This particular spreadsheet contains a list of previously created setups that contain mapping and data-related information. These may be present because they were either created by another user in the same office or by a user in the System Office. In this dialog box, a user can add a new data import record setup, view/modify an existing data import record setup (if it was created in the System Office only a copy of the modified record can be saved), or process an existing data import record setup.

Add New Data Import Record Setup

The process for either adding a new setup or modifying an existing setup is very similar. Adding a new setup requires one additional step, this involves selecting the type of record to be imported. After this step for adding a new setup, the workflow is nearly identical. The File to be Used for Mapping dialog box enables the user to select the file to be used to map the data (although this is not a required field) and other data-specific details (e.g., should Record Matching be enabled or is a Column Heading present in the file).

File to be used for Mapping

Select the file and data format. Depending on the file size and connection speed, this process may take several minutes to upload.

Select File

Data Format

Column Headings Present

Field Separator (e.g., | ~ etc.). Default value is '|':

Automatic Value Assignment

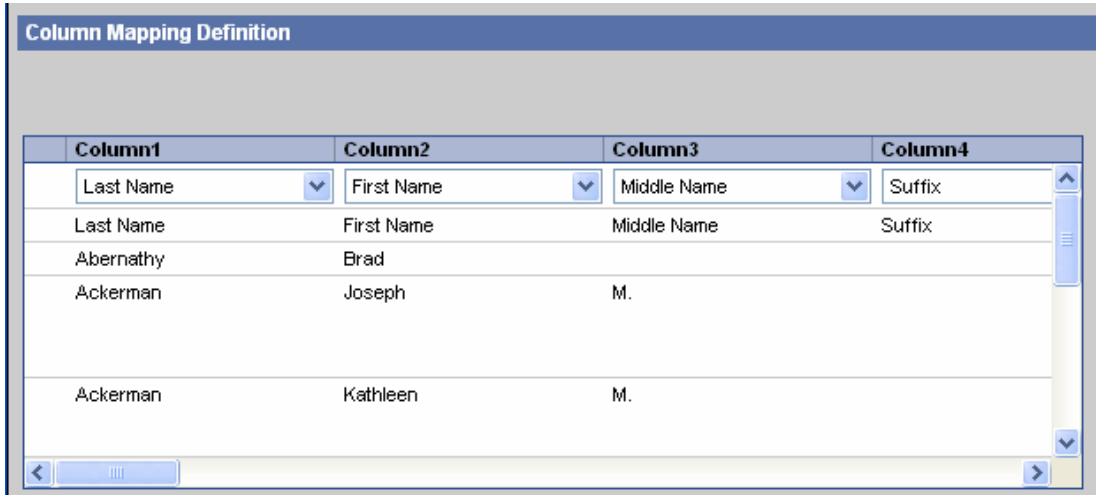
Type

Source

Record Matching

Should a Business Record be created for the Employer if one does not already exist?

The Column Definition Mapping dialog box opens. If a file was selected on the File to be used for Mapping dialog box and a Column Heading is present, then it is a straight-forward task to map the data in the import file to the data fields in the SmartOffice program. This dialog box utilizes field drop-downs and each SmartOffice field should only be selected once per import definition.



After mapping the data, the Data Format Selection dialog box opens. This is where the telephone format is selected: US/Canadian or an International format. The date format is also selectable here if it is something other than MM/DD/YYYY. An option to designate the century for all date fields is also present. If the date fields in the import file contain a two digit year, then information regarding the century should be entered here. The same century will be used for all date fields so it is important not to have mixed dates in the import file. If there is a mixture of 20th and 21st century dates, they will all be designated with the century entered in the Century field on this dialog box.

The Setup Information dialog box provides the ability to name the newly added or modified file. Setup records with the same name can display on the Import Setup List. If a setup record from the local office is modified and the name is not changed, the user is prompted to overwrite the existing file, save a new copy of the setup with the same name, or cancel the operation.

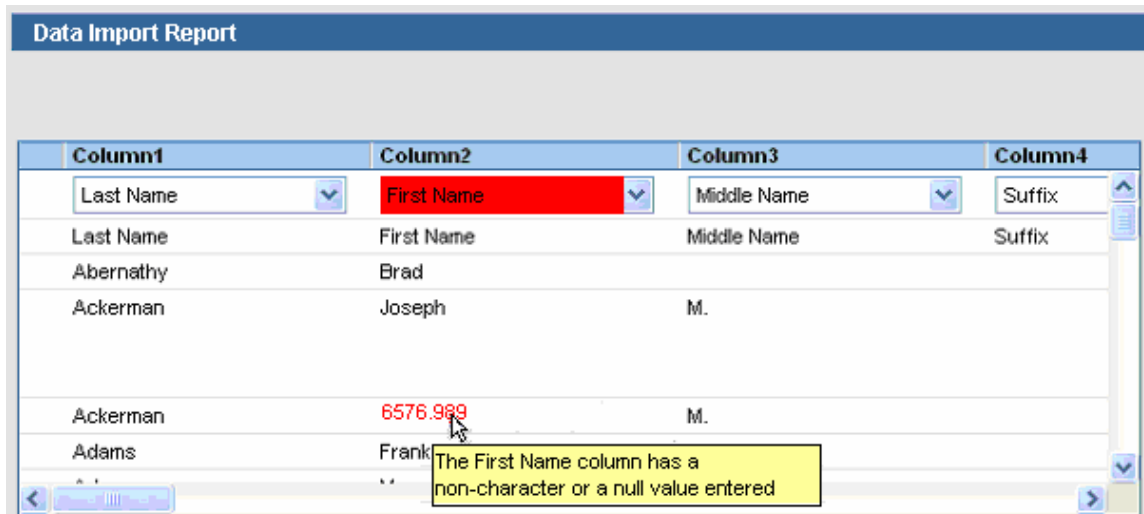
Process Data Import Setup

After defining the criteria for the data to import, the setup record should be run to add the appropriate data into the SmartOffice program. Tag the Setup record and then click the **Run Setup** button. The File to be used for Import dialog box displays in order to browse to the location of the data file. Click the **Finish** button to process the imported data and generate a report. If any newly imported contacts are potential duplicate records, they will display on the Duplicate Contact report that generates after the process is completed. The imported data can easily be located in the Set to which they were added during the import process.

Details of Data Import Processes

Error Handling for all Import Types

Error handling was introduced in the Data Import Wizard section of the SmartOffice program. There is an Automatic Error Checking option that is selectable at the time of file processing on the File to be Used for Import dialog box. This verifies the integrity of the mapping and data. The user has the ability to cancel the process if something does not look correct or if there is a data mapping error.



Column1	Column2	Column3	Column4
Last Name	First Name	Middle Name	Suffix
Abernathy	Brad		
Ackerman	Joseph	M.	
Ackerman	6576.989	M.	
Adams	Frank		

Basic Contact Imports

The four basic contact import processes (Individual, Business, Advisor and Agency) all share the same basic workflow. When the Record Matching option is selected and potential duplicate contacts are found, then a duplicate contact report based on the imported records is displayed. When either an Individual Contact Import or an Advisor Import is processed and the Employer or Agency record mapped from the file does not exist in the office, it is automatically created and linked to the import record.

A unique feature of the Individual Contact import is related to its ability to import Business records located within the same file if they are formatted correctly. Occasionally, a purchased mailing list will contain both Individual and Business data within the same file. The file must be formatted so that the Last Name field and First Name field for each individual contact record is complete. To import business records within the same file at the same time, the records intending to be imported as Business records must have no data in the Last Name field and complete information in the Employer field. The Employer field must also be part of the data mapping definition.

Employee Census Import

The Employee Census Import is different from the other import types due to the nature of Employee Census data management and the Group Insurance Business. There are two different Record Matching options that provide the end user with a level of control over the imported data that is not necessary for the other contact import types. Because employers may provide either a complete roster or only an updated roster with new employees, handling for these different types of record matches was built into the system.

- **Option 1:** Assumes that a complete roster of employees was supplied and will be imported. New members will be added, updates and changes will be applied for existing members, and members not found in the import file will be removed from the Employee Census List of the particular business and will be converted to full contact records so that no data is lost.
- **Option 2:** Assumes that only a partial update was supplied with newly added members and updates to existing members. If a member is not located in the file, they will remain on the Employee Census List.

Select a Record Matching option that will process the data from the import file based on the existing Employee Census data for this Business. (If there are no existing Employee Census records, then no Record Matching will occur.)

- Option 1:** Import a complete roster of employees. This option adds new members, updates existing members, and removes members who are no longer employees. The records that are not present in the import file will be removed from the Employee Census list of the current Business and converted to standard contact records with all data intact.
- Option 2:** Import a partial roster of employees. This option adds new members and updates existing members. The records that are not present in the import file will remain part of the Employee Census list of the current Business.