

ATS Ultimate Spreadsheet Importer



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Functionality

- Allows you to import and update records in iMIS from a Microsoft Excel spreadsheet
- Creates individual and company records
- Update custom demographics in iMIS
- Create activity records in iMIS
- Desktop application that requires the iMIS Business Objects and the .NET 2.0 framework to be installed
- Works with both iMIS 10.x and iMIS 15.x



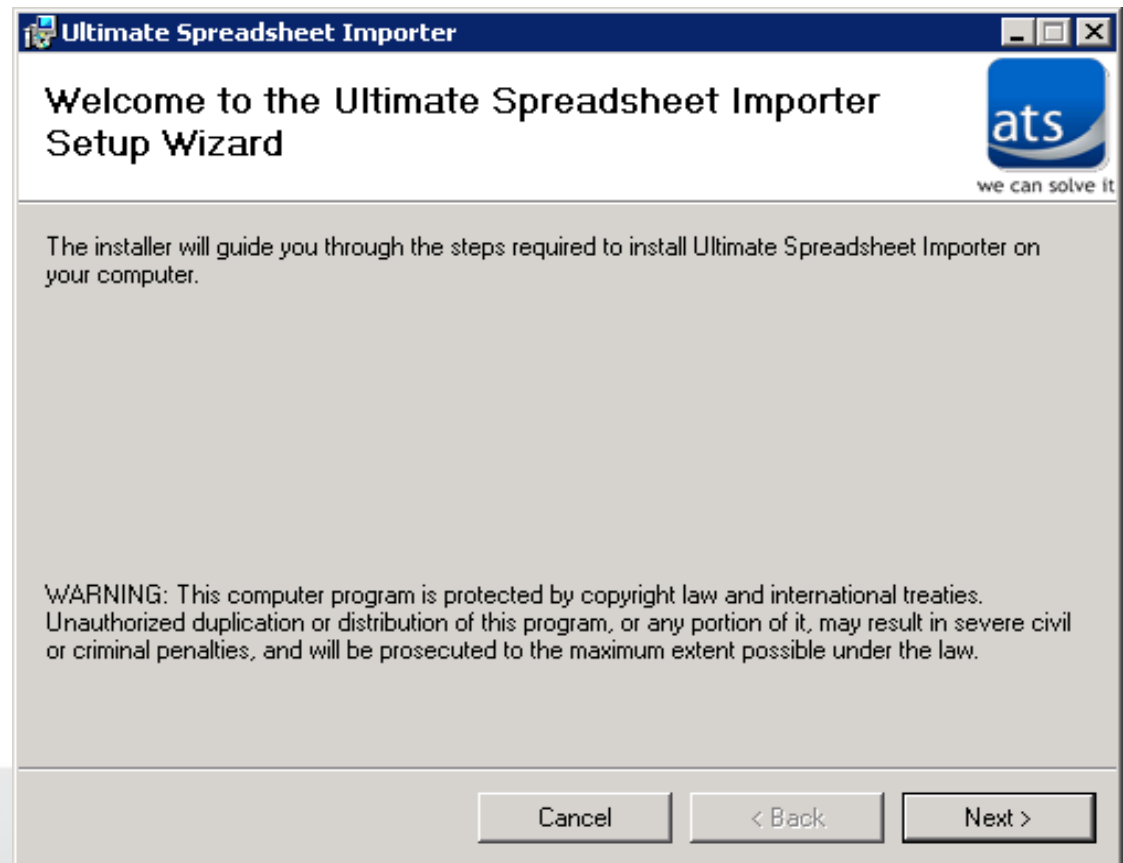
Key Features

- Extensive duplicate checking based on setup you control in iMIS
- Validates data in a spreadsheet against iMIS lookup fields
- User-controlled column matching
- Review matched and unmatched records and export them for review
- Selectively decide which unmatched records to import into iMIS - all or just a few
- Provides notes that indicate possible reasons for a match or non-match
- Create activity records for standard or custom activity types



Installation

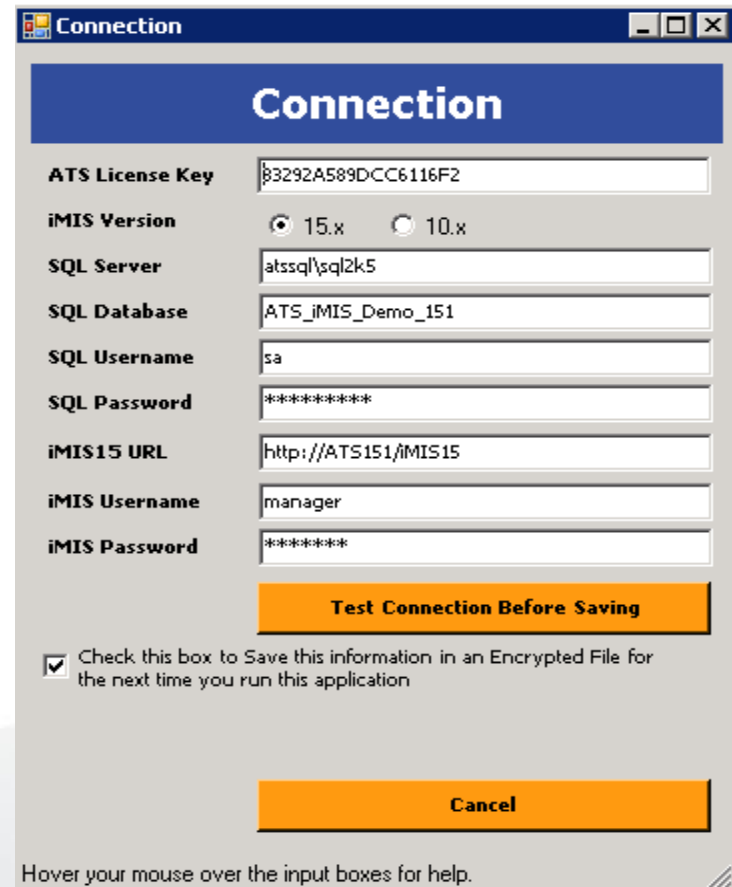
- Simple, wizard installer



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Connection Setup

- License key provided by ATS



The screenshot shows a Windows-style dialog box titled "Connection". It contains several input fields and a checkbox. The fields are: "ATS License Key" with the value "83292A589DCC6116F2"; "iMIS Version" with radio buttons for "15.x" (selected) and "10.x"; "SQL Server" with the value "atssql\sql2k5"; "SQL Database" with the value "ATS_iMIS_Demo_151"; "SQL Username" with the value "sa"; "SQL Password" with the value "*****"; "iMIS15 URL" with the value "http://ATS151/iMIS15"; "iMIS Username" with the value "manager"; and "iMIS Password" with the value "*****". Below the fields is an orange button labeled "Test Connection Before Saving". At the bottom, there is a checkbox that is checked, with the text "Check this box to Save this information in an Encrypted File for the next time you run this application". At the very bottom is another orange button labeled "Cancel".

Field	Value
ATS License Key	83292A589DCC6116F2
iMIS Version	15.x
SQL Server	atssql\sql2k5
SQL Database	ATS_iMIS_Demo_151
SQL Username	sa
SQL Password	*****
iMIS15 URL	http://ATS151/iMIS15
iMIS Username	manager
iMIS Password	*****

Check this box to Save this information in an Encrypted File for the next time you run this application

Hover your mouse over the input boxes for help.



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User Security

- Create ATSIMPORTER Access Keyword
- Customers>>Set up tables>>General Lookup/Validation

General lookup/validation

New Open Edit Delete

ACCESS_KEYWORDS

ATSIMPORTER (ATSIMPORTER)

Code ATSIMPORTER

Expansion

Description ATSIMPORTER



User Access

- Add the ATSIMPORTER keyword to each user's credentials that will use the Importer

*** Manage customers Individual Member - MANAGER**

Title, other

Signature

Check Tasks On Login

Module Authorization Levels

Customers	<input type="text" value="8 - System Setup"/>	Specific Types	<input type="text"/>
Dues	<input type="text" value="8 - System Setup"/>	AR/Cash	<input type="text" value="8 - System"/>
Orders	<input type="text" value="8 - System Setup"/>	Sys Mgmt.	<input type="text" value="8 - System"/>
Certification	<input type="text" value="8 - System Setup"/>	Fund Raising	<input type="text" value="8 - System"/>
Events	<input type="text" value="8 - System Setup"/>	Referral	<input type="text" value="0 - No Acce"/>
Service Central	<input type="text" value="0 - No Access"/>	Exposition	<input type="text" value="8 - System"/>

Access Keywords



Data Access

- ATSIMPORTER General Lookup table sets which activity types and demographic tabs the Importer can write to
- For activities add activity type + _ACTIVITY
- For tabs use tab name in Customizer

General lookup/validation

New Open Edit Delete

ATSIMPORTER

CEU_ACTIVITY
DUES_ACTIVITY
MEETING_ACTIVITY
Name-Demo
Name-Favorite Things
ORDER_ACTIVITY

Code DUES_ACTIVITY

Expansion

Description

Window Designer

New Open Edit Delete

Current windows
Name-Favorite Things

Table Name_Demo

Number of columns 1

Current fields
FAV_COLOR (Favorite Co
FAV_NUMBER (Favorite N

Add
Up
Down
Remove



Address Validation

- Setup lookup table to identify address abbreviations
- Reciprocal setup not needed

General lookup/validation

New Open Edit Delete

DUPLICATE_ADDRESS_STRINGS

AVENUE	(AVE)	Code	AVENUE
BOULEVARD	(BLVD)	Expansion	
CIR	(CIRCLE)	Description	AVE
E	(EAST)		
LANE	(LN)		
N	(NORTH)		
N. E.	(NE)		
N. W.	(NW)		
NORTHEAST	(NE)		
NORTHWEST	(NW)		
PARKWAY	(PKWY)		
ROAD	(RD)		
S	(SOUTH)		
S. E.	(SE)		
S. W.	(SW)		
SOUTHEAST	(SE)		
SOUTHWEST	(SW)		
STREET	(ST)		
SUITE	(STE)		
W	(WEST)		



Company String Identification

- Setup lookup table to identify possible abbreviations in company names

General lookup/validation

New Open Edit Delete

DUPLICATE_COMPANY_STRINGS

GM	(GENERAL MOTORS)	Code	International
INC		Expansion	
International (Int'l)		Description	Int'l
KFC	(KENTUCKY FRIED CHIC		
LIMITED			
LLC			



First Name Validation

- Setup lookup table to identify possible first name options

General lookup/validation

New Open Edit Delete

DUPLICATE_FIRST_NAMES

BEN	(BENJAMIN)	Code	BEN
BILL	(WILLIAM)	Expansion	
BOB	(ROBERT)	Description	BENJAMIN
CHARLES	(CHARLIE)		
CHRIS	(CHRISTOPHER)		
CINDY	(CYNTHIA)		
DAN	(DANIEL)		
DAVE	(DAVID)		
DOUG	(Douglas)		
ED	(EDWARD)		
JAMES	(JIM)		
JEFF	(JEFEREY)		
JOHN	(JONATHAN)		
MELISSA	(MISSY)		
MIKE	(MICHAEL)		
PETE	(PETER)		
PHIL	(PHILLIP)		
RICH	(RICHARD)		
SAM	(SAMUEL)		
STAN	(STANLEY)		
THOMAS	(TOM)		
TIM	(TIMOTHY)		
ZACH	(ZACHARIAH)		



Preparing Your Spreadsheet

- First row must contain column names
- Columns can contain individual, company demographic and activity data

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
FIRST	MIDDLE	LAST	ADDRESS1	ADDRESS2	ADDRI	CITY	STATE	ZIP	COL	WORKPHONE	EMAIL	MEMBERT	STATUS	COMPANY	COTYPE	COSTATUS	SPOUSE
Brad	L.	Pitt	1400 Hollywood Blvd.	Suite 209		Hollywood	CA	90201		2025554567	bpitt@ats	M	A	Warner Brothers Studios	CM	A	Angelina
Kyle		Orton	5566 Dove Valley Pky			Englewood	CO	80111		3039871234	korton@a	M	A	Denver Broncos	CM	A	Susan
Paul		Stastny	1500 Chopper Ave.			Denver	CO	80201		3034881234	pstastny@	M	A	Colorado Avalanche	CM	A	Jane

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
ID	FIRST	MIDDLE	LAST	COMPANY	MEMBERT	STATUS	COTYPE	COSTATUS	ACTTYPE	DATE	BEGINDATE	AMOUNT	DESC	
101									MEETING	11/1/2009	12/1/2009	50	December Meeting	
156									MEETING	11/1/2009	12/1/2009	125	December Meeting	
210									MEETING	11/1/2009	12/1/2009	100	December Meeting	
120									MEETING	11/1/2009	12/1/2009	50	December Meeting	
164									MEETING	11/1/2009	12/1/2009	100	December Meeting	
151									MEETING	11/1/2009	12/1/2009	125	December Meeting	
177									MEETING	11/1/2009	12/1/2009	50	December Meeting	
178									MEETING	11/1/2009	12/1/2009	125	December Meeting	
118									MEETING	11/1/2009	12/1/2009	100	December Meeting	



Required Fields

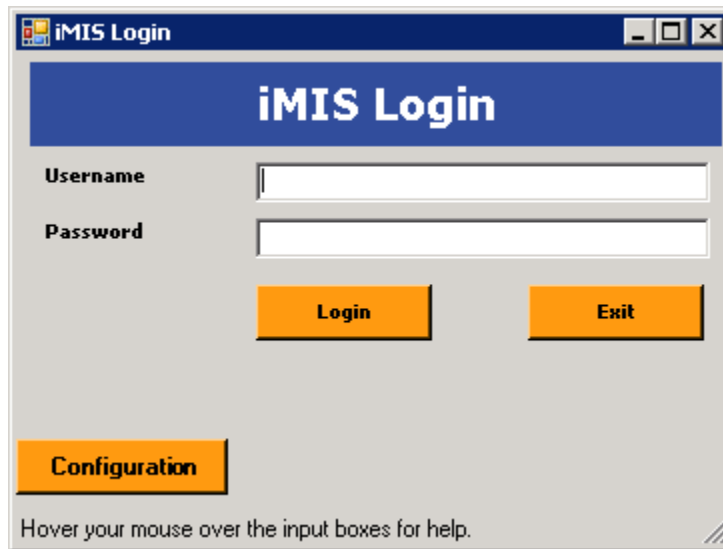
When adding records to iMIS required fields are:

- Individual Records
 - First Name
 - Last Name
 - Member Type
 - Status
- Company Records
 - Company Name
 - Member Type
 - Status



Using the Importer

- Login using your iMIS login and password

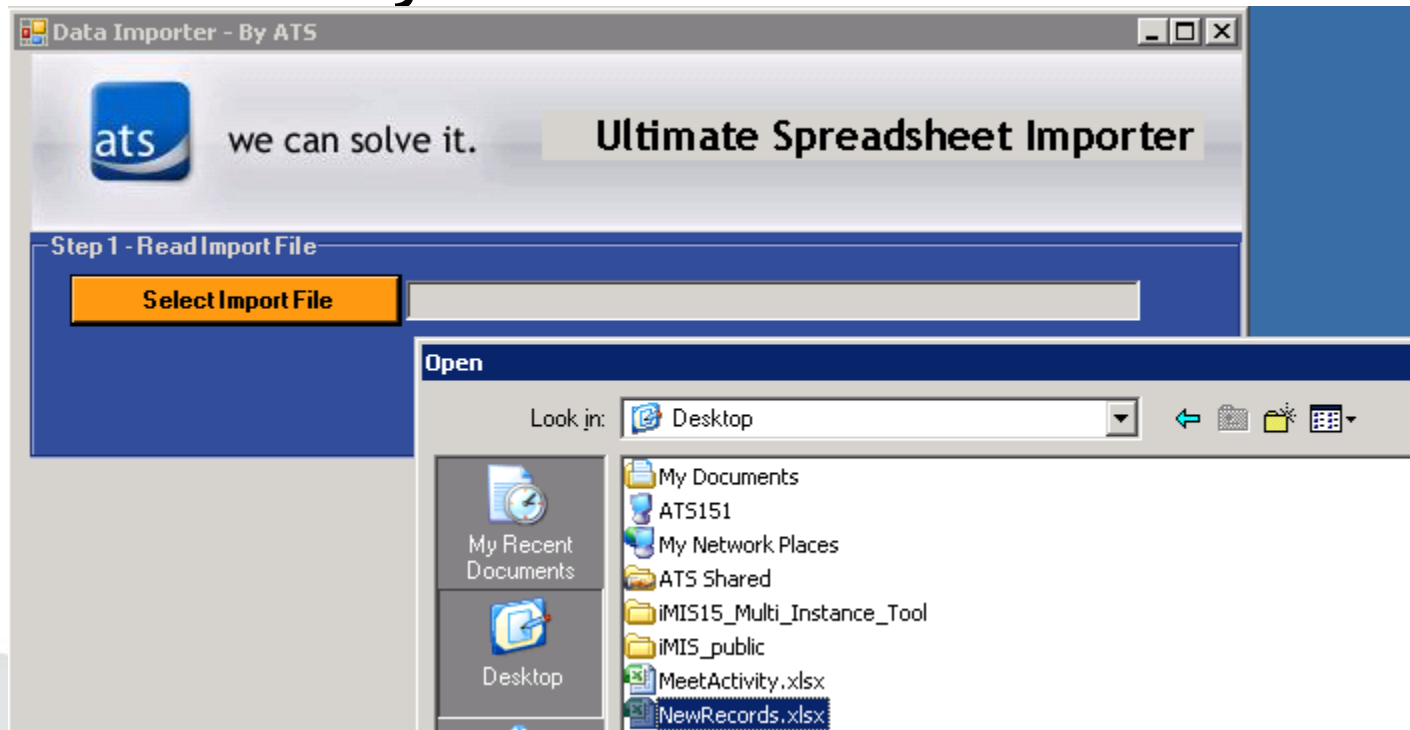


The image shows a screenshot of a web browser window titled "iMIS Login". The window has a blue header bar with the text "iMIS Login" in white. Below the header, there are two input fields: "Username" and "Password". Below the input fields, there are two orange buttons: "Login" and "Exit". At the bottom left of the window, there is a "Configuration" button. At the bottom right, there is a small icon of a mouse cursor. Below the window, there is a text prompt: "Hover your mouse over the input boxes for help."



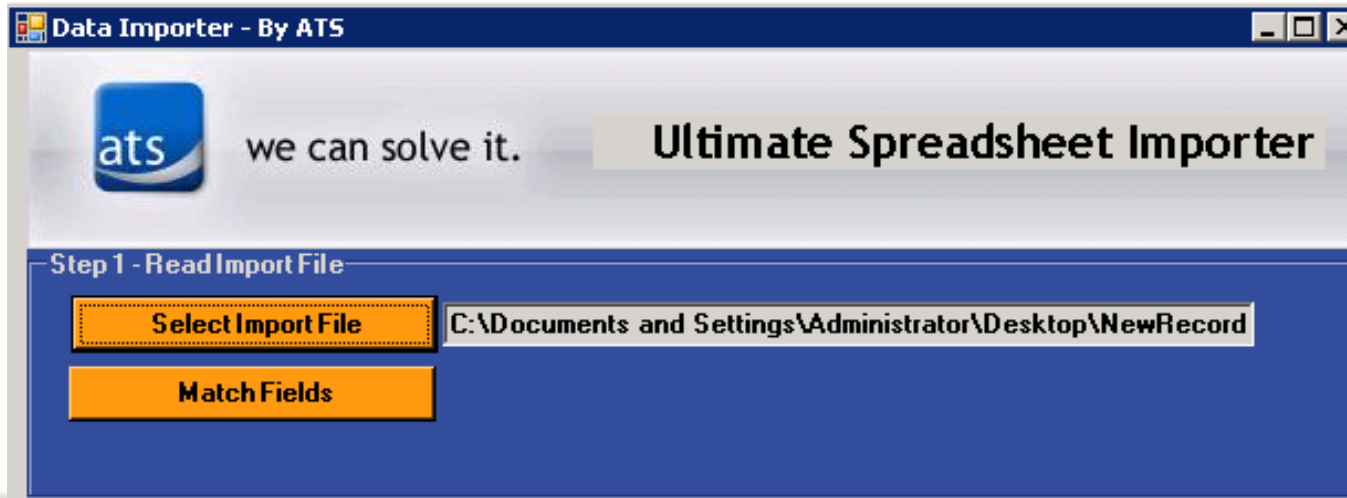
File Selection

- Click the Select Import File button to browse to your Excel file.



Match Fields

- Click the Match Fields button to start the matching process between iMIS and the spreadsheet



Matching Templates

- Create matching templates to map iMIS fields to the columns in your spreadsheet
- Can be saved for regularly-occurring imports



Field Matching

- For each type of update - Company, Individual, Activity or Demographic - you can select which column matches from the Excel spreadsheet.



The screenshot shows a vertical list of fields in a dialog box titled "Match Fields". The fields are:

- Company
- Company Address [Address]
- Company Address [Street Address]
- Company Address [Home Address]
- Company Demographics
- Company Activities
- Individual
- Individual Address [Address]
- Individual Address [Street Address]
- Individual Address [Home Address]
- Individual Demographics
- Individual Activities
- Save Matches



Field Matching

- Using the dropdown for each field make matches

Individual Information
* To add people to iMIS you need to provide a Member Type, Status, First, and Last name.

Spreadsheet Columns	iMIS Fields
	Individual iMIS ID
MEMBERTYPE	Individual Member Type*
	Individual Category
STATUS	Individual Status*
	Prefix
FIRST	First Name*
	Informal
MIDDLE	Middle Name
LAST	Last Name*
LAST	Suffix
ADDRESS1	Designation
ADDRESS2	Title
ADDRESS3	Company
CITY	Home Phone
STATE	Work Phone
ZIP	Toll Free Phone
COUNTRY	Fax
WORKPHONE	Email
	Website
	Chapter
	Gender
	Birth Date
	Join Date
	Paid Thru

Next



Available Demographics

- Only fields from demographic tabs added to the ATSIMPORTER Gen Table will be visible in the Importer
- A message will display on tabs where no setup has occurred.

Individual Demographics

Spreadsheet Columns	iMIS Fields
Name-Favorite Things	Name-Demo
<input type="text"/>	Favorite Color
<input type="text"/>	Favorite Number

Company Demographics

Spreadsheet Columns	iMIS Fields
---------------------	-------------

Demographic Tabs must have the Tab Name added to the ATSIMPORTER General Lookup table AND either no member type restrictions or 'Company Type' restrictions.



Available Activity Types

- Only activity types added to the ATSIMPORTER Gen Table will be visible in the Importer
- A message will display on tabs where no setup has occurred.

Company Activities

Spreadsheet Columns iMIS Fields

CEU DUES ORDER

Course

Meeting/Func

Transaction Date

CEU Type

CEU Hours

Company ID



Activity Matching

- As you select each activity type only the fields activated in iMIS for that activity will display.

Company Activities

Spreadsheet Columns | iMIS Fields

CEU DUES ORDER

Course

Meeting/Func

Transaction Date

CEU Type

CEU Hours

Company ID

Individual Activities

Spreadsheet Columns | iMIS Fields

CEU DUES ORDER

Type

Transaction Date

Begin Date

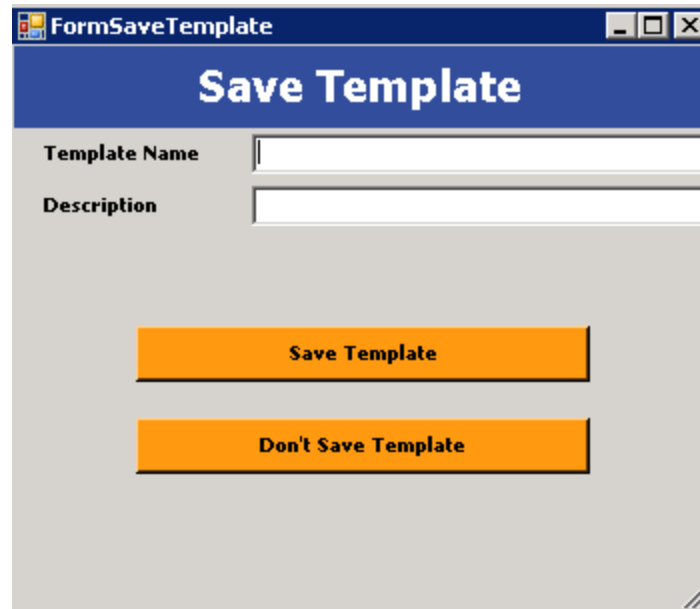
Thru

Amount



Save Template

- If you will use this import matching again, you can save it for future use.

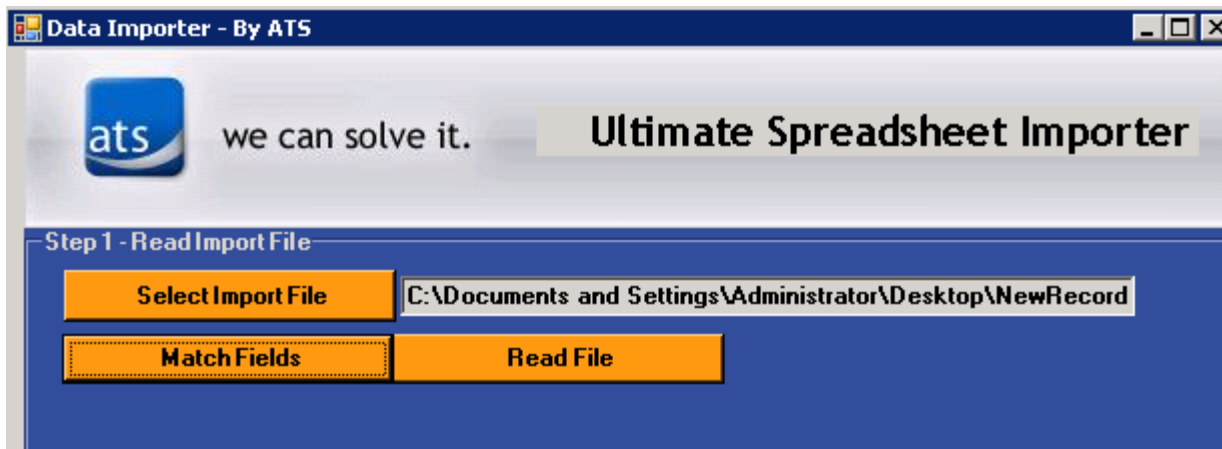


The image shows a screenshot of a software dialog box titled "FormSaveTemplate". The dialog has a blue header bar with the text "Save Template" in white. Below the header, there are two text input fields: "Template Name" and "Description". At the bottom of the dialog, there are two orange buttons: "Save Template" and "Don't Save Template".



Read File

- Once your matching is setup and selected click the Read File button



Template Selection

- Select an existing mapping template or click Create New Template to setup new field mapping

The screenshot shows the 'Ultimate Spreadsheet Importer' software interface. The main window is titled 'Step 1 - Read Import File' and contains two orange buttons: 'Select Import File' and 'Match Fields'. The 'Select Import File' button is active, and the file path 'C:\Documents and Settings\Administrator\Desktop\NewRecord' is displayed in the adjacent text field. A secondary window titled 'FormGetTemplate' is open, displaying a table of 'Existing Templates'.

	Name	Description	
Select	CMG DUES	CMG DUES	Delete
Select	iMIS Test	iMIS Test	Delete
Select	iMIS Test2	iMIS Test2	Delete

At the bottom of the 'FormGetTemplate' window, there is an orange button labeled 'Create New Template'.



Field Mapping

- Mapping is available for Company & Individual Records
- Each Address Purpose
- Company & Individual Activities
- Company & Individual Demographics
- Can be saved for repeat imports of same type of data



Field Mapping Examples

Individual Information

Match Fields

Company

Company Address [Address]

Company Address [Street Address]

Company Address [Home Address]

Company Demographics

Company Activities

Individual

Individual Address [Address]

Individual Address [Street Address]

Individual Address [Home Address]

Individual Demographics

Individual Activities

Save Matches

Individual Information
* To add people to iMIS you need to provide a Member Type, Status, First, and Last name.

Spreadsheet Columns	iMIS Fields
	Individual iMIS ID
MEMBERTYPE	Individual Member Type*
	Individual Category
STATUS	Individual Status*
	Prefix
FIRST	First Name*
	Informal
MIDDLE	Middle Name
LAST	Last Name*
	Suffix
	Designation
	Title
	Company
	Home Phone
WORKPHONE	Work Phone
	Toll Free Phone
	Fax
EMAIL	Email
	Website
	Chapter
	Gender
	Birth Date
	Join Date
	Paid Thru

Next

Company Address

Match Fields

Company

Company Address [Address]

Company Address [Street Address]

Company Address [Home Address]

Company Demographics

Company Activities

Individual

Individual Address [Address]

Individual Address [Street Address]

Individual Address [Home Address]

Individual Demographics

Individual Activities

Save Matches

Company Address (Purpose:Address)

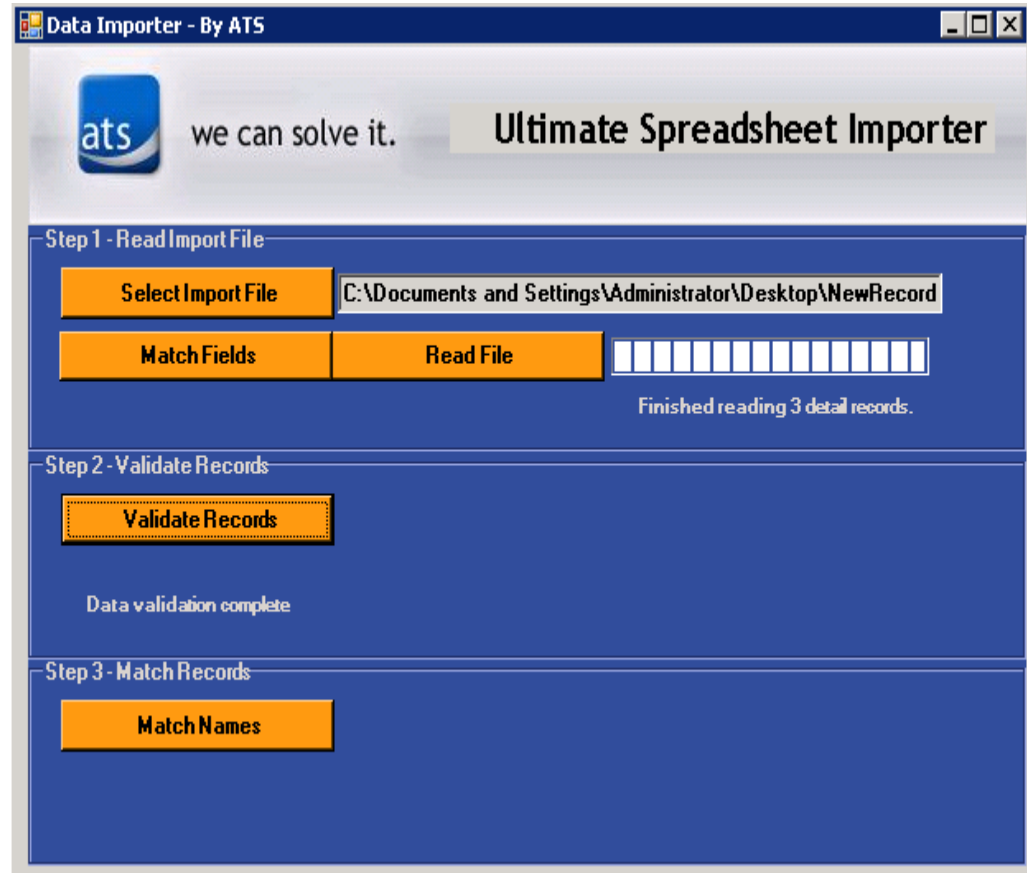
Spreadsheet Columns	iMIS Fields
ADDRESS1	Address Line 1
ADDRESS2	Address Line 2
ADDRESS3	Address Line 3
CITY	City
STATE	State/Province
ZIP	Zip/Postal Code
COUNTRY	Country
	Phone
	Fax
	Email

Next



Validate Records

- The Importer validates the mapping and spreadsheet



Match Names

- Creates a list of names and/or companies that are a possible match in iMIS
- Creates a list of non-matches

Data Importer - By ATS

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Step 1 - Read Import File

Select Import File C:\Documents and Settings\Administrator\Desktop\NewRecord

Match Fields Read File

Finished reading 3 detail records.

Step 2 - Validate Records

Validate Records

Data validation complete

Step 3 - Match Records

Match Names

Names Matched: 0
Organizations Matched: 0

Names Unmatched: 3
Organizations Unmatched: 3

Matching Finished

Step 4 - Review Companies

Review Companies to Add Review Company Matches

Step 5 - Review People

Review People to Add Review People Matches



Company Matches

- Review Companies to Add
- Review Company Matches
- Upload Selected Companies
- Export to CSV file
- Upload Companies before people to create CO_ID link

Matched Company Records

Put a checkmark in the Upload column by the records that you would like to add into iMIS, then press the UPLoAD button.

Companies that are not in iMIS

company	CITY	STATE	UPLoAD	NOTE
▶ Colorado	Denver	CO	<input type="checkbox"/>	
Denver Bronc	Englewood	CO	<input type="checkbox"/>	
Warner Broth	Hollywood	CA	<input type="checkbox"/>	

Upload Checked Companies Close Export to CSV Check All Uncheck All



People Matches

- Review People to Add
- Review People Matches
- Upload Selected People
- Export to CSV file

New People Records

Put a checkmark in the Upload column by the records that you would like to add into iMIS, then press the UPLOAD button.

People who are not in iMIS

	FIRST_NAM	LAST_NAME	TITLE	COMPANY	CITY	STATE	NOTE	UPLOAD
▶	Milan	Heduk		Colorado Avalanche	Denver	CO		<input type="checkbox"/>
	Brandon	Marshall		Denver Broncos	Englewood	CO		<input type="checkbox"/>
	Frank	Sinatra		Warner Brothers Studi	Hollywood	CA		<input type="checkbox"/>
*								

Upload Checked People Close Export to CSV Check All Uncheck All



Records Added to iMIS

Manage customers Individual Member - Milan Heduk

ID Individual Member

Company

Address

Address

Preferred Mail Bill Ship

Phone Fax

E-mail

Profile

Work Phone

Home Phone

Fax

Toll Free

E-mail

Web Address

Major Key

Results

ID	Last Name	First Name	Middle Name	Suffix	Title	Comp
225						Color
▶ 222	Heduk	Milan				Color

