



## A Difficult Task Made Easy

Prepared by  
Association Technology Solutions



# Welcome



Presenter Jim Dalessio, an Integration Specialist at ATS, handles most installation and support requests for the ATS Ultimate Spreadsheet Importer for iMIS.



# USI Key Features



- Import thousands of records at once
- Create new contact records (individual or organization)
- Update existing contact records (individual or organization)
- Import into the following tables and fields
  - Activity records
  - User-defined tables and fields
  - Multi-instance tables and fields
- Robust matching algorithm for duplicate checking
- Option to select records to exclude during import
- Ability to match based on Major Key



# Setup Overview



1. Use the one-click installer
2. Set up the configuration to the server
3. Set up iMIS configurations for best results



# Connect the USI to the iMIS Server



## iMIS management

### System Summary

iMIS Version	20.2.1.235
Database Version	20.2.1.235
.NET Framework Version	4.0.30319.34209
Database Server	atssql\sql2k8r2
Database	JIMDEMO20114
Web Server file path	C:\Program Files (x86)\ASI\iMIS\Net\
Web Server URL	http://jdalessio.atsol.org/
SMTP Server	smtp.atsol.org

**Connection**

**ATS License Key** 889764322hrr67rfy==

**iMIS Version**  15.x-20.x  10.x

**SQL Server** servername\'

**SQL Database** iMIS Database

**SQL Username** sa

**SQL Password** \*\*\*\*\*

**iMIS15 URL** http://servername/virtual directory

**iMIS Username** manager

**iMIS Password** \*\*\*\*\*

**Test Connection Before Saving**

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

**Cancel**

Hover your mouse over the input boxes for help.



# iMIS Setup - Access Keyword



1. Enable user access by creating an ACCESS\_KEYWORDS record called ATSIMPORTER.

## General lookup/validation

New	Open	Edit	Delete
-----	------	------	--------

ACCESS_KEYWORDS	
<b>ATSIMPORTER (ATSIMPORTER)</b>	

Code	ATSIMPORTER
Expansion	
Description	ATSIMPORTER



# iMIS Setup - Grant User Access



2. Add ATSIMPORTER to any contact record that should be allowed to use the USI by going to

- Contact Record
- > User Credentials
- >> Staff Access
- >>> Access Keywords

Access Keywords

[add access keyword](#)

<a href="#">remove</a>	ATSIMPORTER
------------------------	-------------



# iMIS Setup - Duplicate Checking Tables



### 3. Create 3 new “General lookup/validation” tables used to enhance duplicate checking:

General lookup/validation

New		Open		Edit		Delete	
DUPLICATE_ADDRESS_STRINGS							
APT	(Apartment)						
AVE	(Avenue)						
BLVD	(Boulevard)						
CIR	(Circle)						
CTR	(Center)						
DR	(Drive)						
E	(East)						
LN	(Lane)						
N	(North)						
NE	(North East)						
NW	(North West)						
PKWY	(Parkway)						
RD	(Road)						
S	(South)						
SE	(South East)						
ST	(Street)						
STE	(Suite)						
SW	(South West)						
W	(West)						

General lookup/validation

New		Open		Edit		Delete	
DUPLICATE_COMPANY_STRINGS							
CO							
Company							
INC							
LLC	(Limited Liability C						
LTD	(Limited)						
ORG	(Organization)						

General lookup/validation

New		Open		Edit		Delete	
DUPLICATE_FIRST_NAMES							
BEN	(Benjamin)						
BILL	(William)						
BOB	(Robert)						
CHRIS	(Christopher)						
CINDY	(Cynthia)						
Christine	(Chris)						
Crissy	(Christine)						
DOUG	(Douglas)						
JAMES	(Jimbo)						
JIM	(James)						
JIMBO	(Jim)						
JOHN	(Johnathan)						
JON	(Jonathan)						
KRIS	(Kristine)						
MIKE	(Michael)						
MISSY	(Melissa)						
PAM	(Pamela)						





# USI Matching Algorithm (Individuals)



1. Exact match of ID, First name, Last Name
2. Exact Last Name, first three letters of first name, and id
3. Exact Last name, first three letters of first name, and company name
4. Exact match of id but not names (a note is added to the matching results)
5. Exact match on last name, first three letters of first name, and phone number
6. Exact match on last name, first three letters of first name, and email
7. Exact match of last name, first three letters of first name, city and state/province (looking at all addresses)
8. Exact match of last name, first three letters of first name, first 5 digits of postal code (looking at all addresses)
9. Don't match but add a note for other similar names where they did not get caught by previous criteria by looking at the first three letters of the first name.

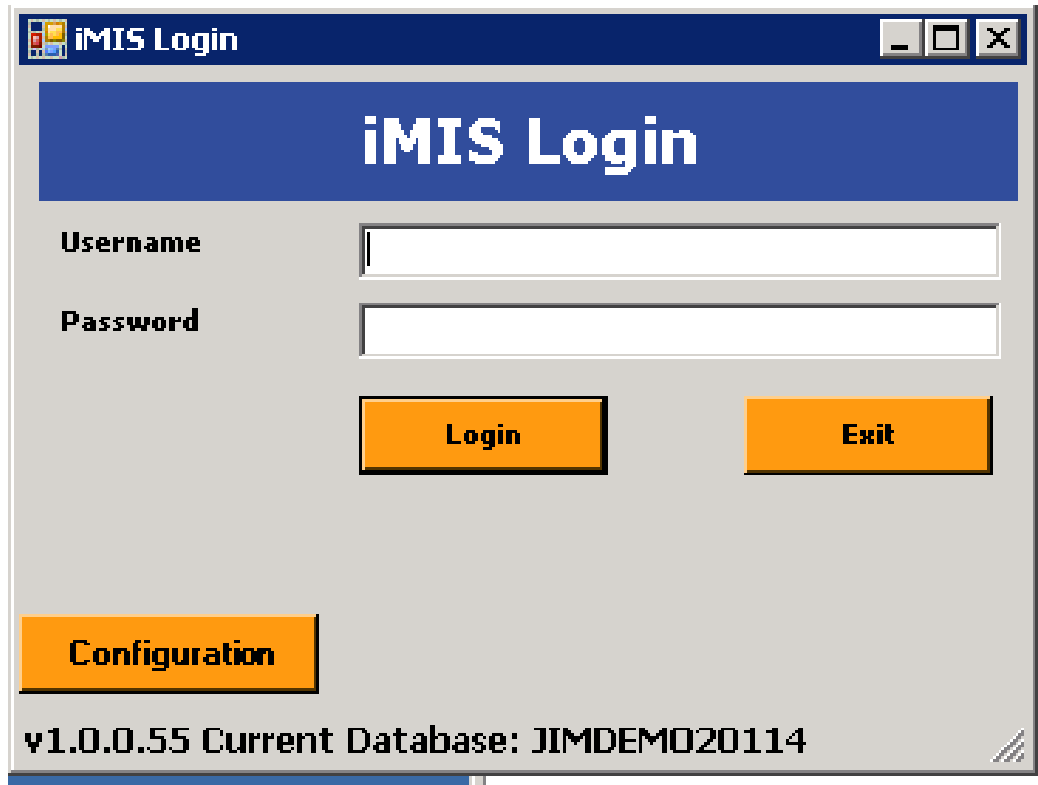


# USI Matching Algorithm (Organizations)

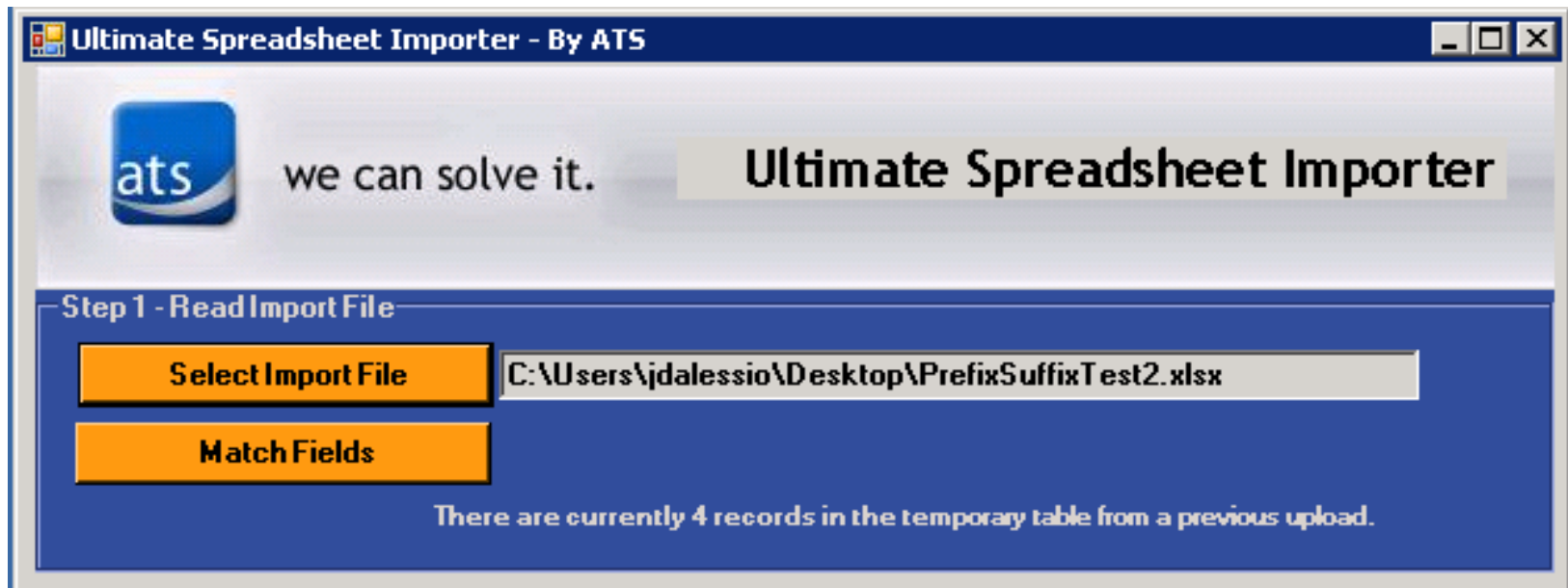


1. Exact match of company id where the company names match
2. Exact match of company id where the company names don't match (includes a note)
3. Look at the previously matched people and if the person matches an iMIS record keep them at the same company
4. Match company names and first 5 digits of postal code
5. Match company names, city, and state/province
6. Match exact first line of address, city, and state
7. Match exact first line of address and first 5 digits of postal code
8. Match similar first line of address (using general lookup table) and city and state
9. Match similar first line of address (using general lookup table) and first 5 digits of postal code
10. Add a note to records where any two companies are at the same physical address
11. In order to find new records in the spreadsheet that might be similar to ones that we match, mark them as matched as well so we don't try to create new records for them. Match company name, city, and postal code.
12. In order to find new records in the spreadsheet that might be similar to ones that we match, mark them as matched as well so we don't try to create new records for them. Match where name is included in the other company name (e.g., ACME Solutions and ACME Solutions Inc.), city, and postal code.

1. Login using an authorized account.



2. Select an Excel spreadsheet to import.



### 3. Create a template or use an existing template.

The screenshot shows a window titled "FormGetTemplate" with a blue header bar containing the text "Existing Templates". Below the header is a table with the following data:

	Name	Description	
Select	PreSuff2	Prefix and Suffix testing	Delete
Select	TestPrefixMajorKey	Testing functionality of iPart	Delete

Below the table is a large grey rectangular area. At the bottom of the window is an orange button labeled "Create New Template".



# USI Import Process - Matching



4. Match fields from the Excel spreadsheet with the fields in iMIS.

**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
Member Type	Individual Member Type*
	Individual Category
Status	Individual Status*
Prefix	Prefix
First Name	First Name*
	Informal
	Middle Name
Last Name	Last Name*
Suffix	Suffix
	Designation
	Title
Employer Name	Company
	Home Phone
	Work Phone synced:[Address]
	Toll Free Phone
	Fax
Email	Email
Email	Website
Suffix	Chapter
Member Type	Gender
Status	Birth Date
Address Line 1	Join Date
Address Line 2	
City	Paid Thru
State	Source Code
	Major Key

**Next**



# USI Import Process - IMPORT!



5. Complete steps 1-3 on the screen

The screenshot shows the 'Ultimate Spreadsheet Importer' application window. The interface is divided into five steps:

- Step 1 - Read Import File:** Includes a 'Select Import File' button with a text field containing 'C:\Users\jdalessio\Desktop\PrefixSuffixTest2.xlsx', a 'Match Fields' button, and a 'Read File' button. A progress bar is shown with the text 'Finished reading 4 detail records.'
- Step 2 - Validate Records:** Includes a 'Validate Records' button and the text 'Data validation complete'.
- Step 3 - Match Records:** Includes a 'Match Names' button and summary statistics: 'Names Matched: 4', 'Names Unmatched: 0', 'Organizations Matched: 0', and 'Organizations Unmatched: 4'. The text 'Matching Finished' is displayed at the bottom.
- Step 4 - Review Companies:** Includes 'Review Companies to Add' and 'Review Company Matches' buttons.
- Step 5 - Review People:** Includes 'Review People to Add' and 'Review People Matches' buttons.



# USI Import Process - IMPORT!



- 6. If you have anyone to add, do that first
- 7. Then review your matches

Matched People Records

Put a checkmark in the Synchronize column by the records that you would like to synchronize fields into iMIS, then press one of the buttons below.

People who are in iMIS									
	IMIS_ID	FIRST_NAM	LAST_NAME	TITLE	COMPANY	CITY	STATE	NOTE	UPLOAD
▶	23140	Billy	Butler		The Butler Di	Denver	CO		<input type="checkbox"/>
	23141	Tim	Forster		Unemployed	Lincoln	NE		<input type="checkbox"/>
	23142	Lynn	Oblen		Jemmy Desig	Bayshore	NY		<input type="checkbox"/>
	23143	Charly	Waters		Best Buy	Denver	CO		<input type="checkbox"/>
*									

Synch Contact, Add Activities, Fill in Blank Single Instance Demographics

Add Multi-Instance Demographics Only

Synch Contact, Add Activities, Overwrite Single Instance Demographics

Add Activities Only

Close    Export to CSV    Check All    Uncheck All





# USI Import Process - Example Spreadsheet



A look at an example Excel spreadsheet:

B	C	D	E	F	G	H	I	J	K	L	M	N	O
First Name	Last Name	Prefix	Email	Suffix	Member Type	Status	Address Li	Address Li	City	State	Zip Code	Employer Name	School Attended
Lynn	Oblien		<a href="mailto:test@test.com">test@test.com</a>		STU	A	1172 Brookdale Ave.	Bayshore	NY	11706	Jemmy Designs	Michigan State Univer	
Billy	Butler		<a href="mailto:test1@test.com">test1@test.com</a>		STU	A	1001 Broad	Ste 345	Denver	CO	80122	The Butler Did It	Regis University
Charly	Waters		<a href="mailto:test2@test.com">test2@test.com</a>		STU	A	3600 S. W.	Ste 100	Denver	CO	80235	Best Buy	
Tim	Forster		<a href="mailto:test3@test.com">test3@test.com</a>		STU	A	6001 Dodge St.		Lincoln	NE	68588	Unemployed	Altered State



# USI Import Process - Example Results



Here's what was added to Mr. Butler's record:

## Manage customers Student Member - Billy Butler

ID: 23140    Student Member    Active    Category

Prefix: Billy    M    Butler    Suffix:    Informal    Designation    Member Title

Company ID:    The Butler Did It    Company Sort: BUTLER DID IT

**Address**    Street Address    Home Address    New

Address: 1001 Broadway    Ste 345    Address 3:    Denver    CO    80122    Country:    Status:    Preferred:  Mail     Bill     Ship    Phone:    Fax:    E-mail:

Financial    Categories    Solicitor Data    Other    Salutations    Dem

Categories:    School Attended: Regis University    Sponsor:    Date Certified:    Annual Revenue: 0    System Type:    Spou:    Mobile Pho:    Staff Si:    Activity Fi:

**Results**    Record History    Activities-All    Calls    Letters    Roster    AR/Cash    Billing    Events    Orders    Certification    Matching Plan

ID	Last Name	First Name	Middle Name	Suffix	Title	Company
▶ 23140	Butler	Billy				The Butler Did It





# More Information



ATS Website: <http://atsol.org>

USI Product Page: <http://atsol.org/USI>

Product Sales: [info@atsol.org](mailto:info@atsol.org)

Client Support: <http://atsol.org/Support>

Jim Dalessio: <http://atsol.org/OurStaff#Jim>