



Importing Data into iMIS

Presented by:

Association Technology Solutions, LLC



About ATS



- Serving iMIS community since 1996
- Award-winning, full-service Authorized iMIS Solutions Provider (AiSP)
- Specialization in iMIS investment maximization



Hosted by



Presenter:

Tresse French

Technical Support Analyst

Association Technology Solutions, LLC

Direct: (571) 293-0827

Email: tfrench@atsol.org



Presenter:

Laura Tidquist

Technical Support Manager

Association Technology Solutions, LLC

Direct: (720) 945-7255

Email: ltidquist@atsol.org



Moderator:

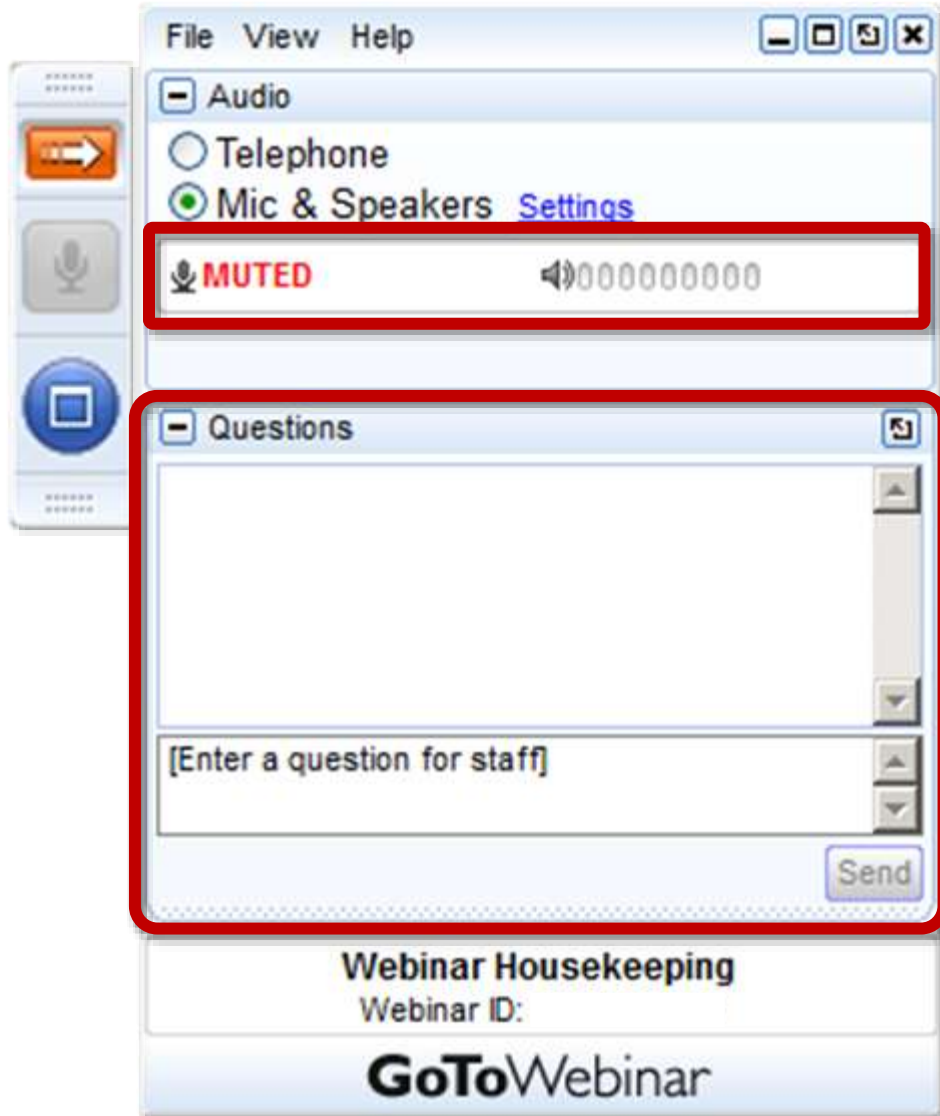
Richard Banks

Sales Manager

Association Technology Solutions, LLC

Direct: (571) 213-4785

Email: rbanks@atsol.org



- Attendees are muted to reduce background noise
- Remember to ask questions via the Questions panel
- Questions will be answered during Q&A after presentation is complete



- Utilities
- Data Transfer Utilities
 - Import Utility

- What is it?
 - Tool that allows you to import data from a third-party source that meet the mapping requirements of your iMIS database tables
- What kind of data can I import?
 - Company & Individual records
 - Multiple addresses and can set preferred settings
 - Single-instance demographics
 - Activity records

- File must be a comma or tab delimited text file. Must map to (match) fields in your iMIS database.

	A	B	C	D	E
1	ID	FIRST	LAST	ADDRESS1	CITY
2	1234	Ima	Customer	1234 Main Street	Any
3	2345	Jane	Member	8901 Cherry Blossom Lane	Any
4	5678	John	Smith	8765 MLK Way	Any





Import Template

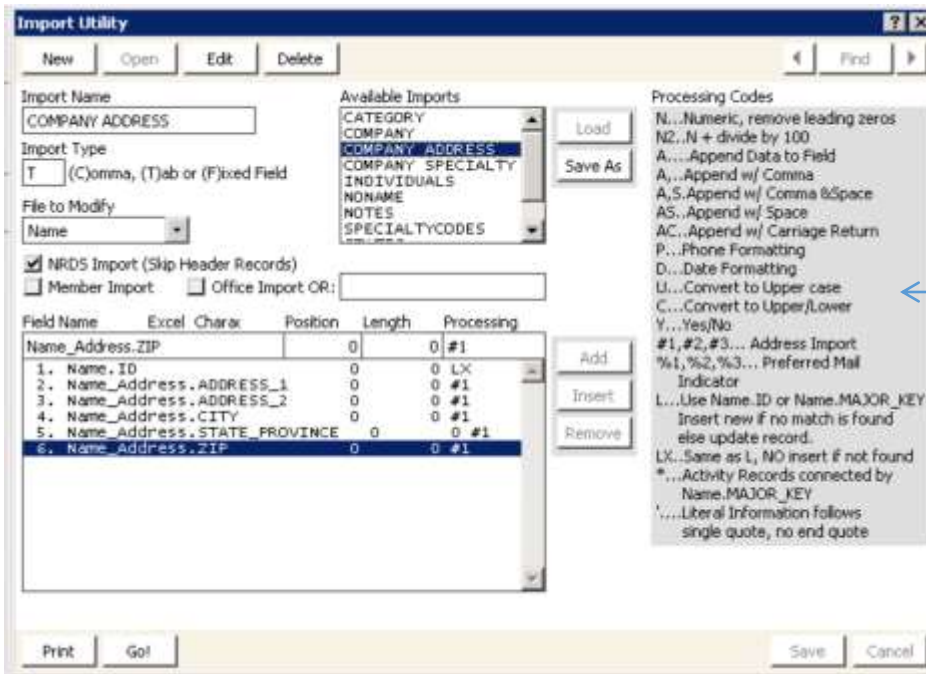


- The import template must be created based on the data being imported
- Each row in the template represents an entry in the header row of your template file.

The screenshot shows the 'Import Utility' window with the following components:

- Import Name:** NAMES
- Import Type:** T (Comma), (T)ab or (F)ixed Field
- File to Modify:** Name
- Available Imports:** (Empty list)
- Processing Codes:**
 - N...Numeric, remove leading zeros
 - N2..N + divide by 100
 - A...Append Data to Field
 - A...Append w/ Comma
 - A,S.Append w/ Comma &Space
- Field Name Table:**

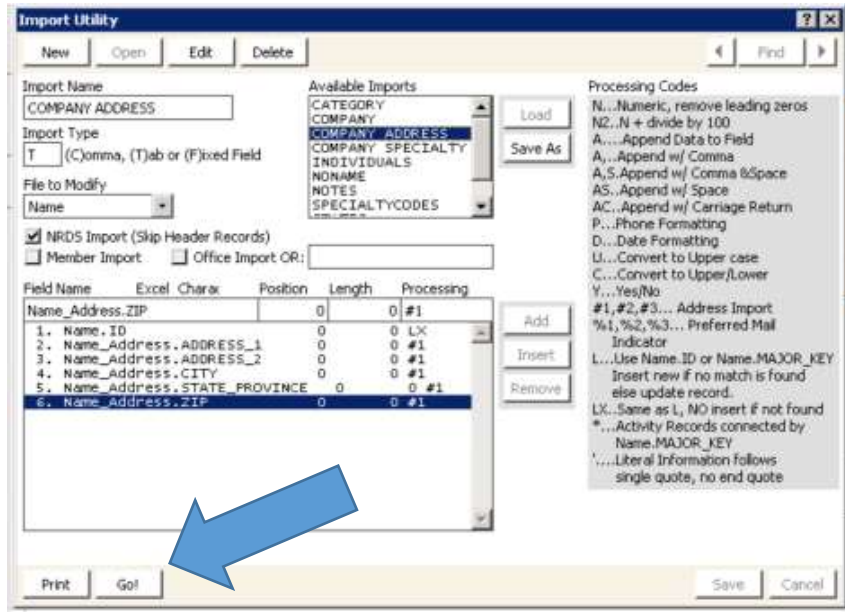
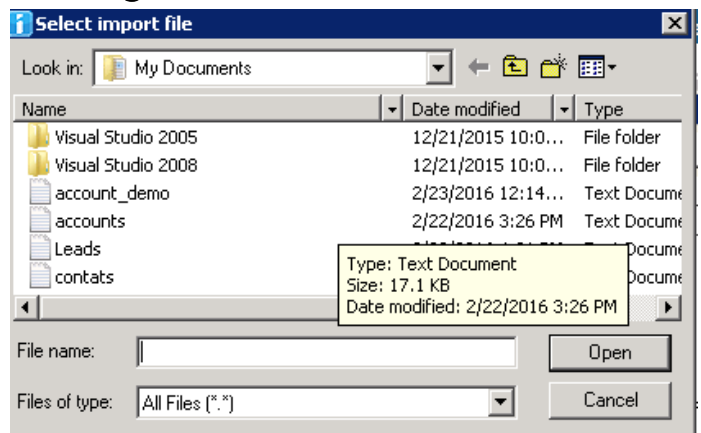
Field Name	Excel E	Position	Length	Processing
1. Name.ID		0	0	L
2. Name.FIRST_NAME		0	0	
3. Name.LAST_NAME		0	0	
4. Name_Address.ADDRESS_1		0	0	#1
5. Name_Address.CITY		0	0	#1
- Processing Legend:**
 - ...Convert to Upper/Lower
 - Y...Yes/No
 - #1,#2,#3... Address Import
 - %1,%2,%3... Preferred Mail Indicator
 - L...Use Name.ID or Name.MAJOR_KEY
 - Insert new if no match is found else update record.
 - LX...Same as L; NO insert if not found
 - *...Activity Records connected by Name.MAJOR_KEY
 - '...Literal Information follows single quote, no end quote
- Buttons:** New, Open, Edit, Delete, Find, Load, Save As, Add, Insert, Remove, Print, Go!, Save, Cancel



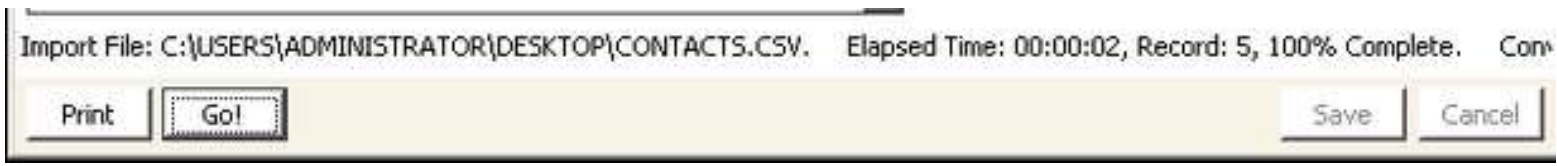
Processing Codes

- N...Numeric, remove leading zeros
- N2..N + divide by 100
- A....Append Data to Field
- A,..Append w/ Comma
- A,S..Append w/ Comma &Space
- AS..Append w/ Space
- AC..Append w/ Carriage Return
- P...Phone Formatting
- D...Date Formatting
- U...Convert to Upper case
- C...Convert to Upper/Lower
- Y...Yes/No
- #1,#2,#3... Address Import
- %1,%2,%3... Preferred Mail Indicator
- L...Use Name.ID or Name.MAJOR_KEY
Insert new if no match is found
else update record.
- LX..Same as L, NO insert if not found
- *...Activity Records connected by
Name.MAJOR_KEY
- '....Literal Information follows
single quote, no end quote

- Click Go
- Grab your file



- the number of records imported will display, along with 100% Complete once the import is complete.





ASI vs ATS Importer



Features of the ATS Importer not in the ASI importer

- Dedupes against iMIS with enhanced logic
- Validates data against iMIS tables and reports missing or invalid data
- **Lets you review records that match and don't match before you importer them.**
- Can create new iMIS records for people and companies and link them together
- Can create single and multi-instance demographics
- Can update existing demographics in iMIS
- Can load usernames/passwords
- Can create activity records



ATS Ultimate Spreadsheet Importer



- What is it?
 - It's a **stand**-alone product that allows you to import data into iMIS from an Excel spreadsheet
 - Extensive duplicate checking through a series of intelligent matching algorithms (e.g., names, email, address, etc)
 - Validates data in a spreadsheet against iMIS lookup fields
- What kind of data can I import?
 - Company & Individual records
 - And, you can link individuals to the company record
 - Multiple addresses and can set preferred settings
 - Single-instance demographics
 - Multi-instance demographics
 - Activity records
 - Usernames and Passwords



Simple Installation



- Wizard Desktop Install
- Supported on versions from iMIS 10 to iMIS 20 2015 Q4
- Licensed from ATS

The screenshot shows a 'Connection' dialog box with the following fields and options:

- ATS License Key:** A text input field with a greyed-out value.
- iMIS Version:** Radio buttons for '15.x-20.x' (selected) and '10.x'.
- SQL Server:** Text input field containing 'qa202\sql2k14'.
- SQL Database:** Text input field containing 'EA202Demo'.
- SQL Username:** Text input field containing 'sa'.
- SQL Password:** Text input field containing '*****'.
- iMIS15 URL:** Text input field containing 'http://qa202/iMIS/'.
- iMIS Username:** Text input field containing 'manager'.
- iMIS Password:** Text input field containing '*****'.

Below the fields, there is an orange button labeled 'Test Connection Before Saving'. A checkbox 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 bottom, there is another orange button labeled 'Cancel'. A footer note says: 'Hover your mouse over the input boxes for help.'

- Security by Access Keyword
- ATSIMPORTER keyword

General lookup/validation

New Open Edit Delete

ACCESS_KEYWORDS

ATSCHECKINADMIN (ATSCHECKINADMIN)

ATSIMPORTER (ATSIMPORTER)

ATSSSTOREADMIN (Access to Online MNGR (Store Manager))

Code ATSIMPORTER

Expansion

Description ATSIMPORTER

Access Keywords

[add access keyword](#)

remove	ATSCHECKINADMIN
remove	ATSIMPORTER
remove	ATSSSTOREADMIN
remove	MNGR



Controlled Data Access



- ATSIMPORTER general lookup table controls which activity types and demographic tabs can be imported to or updated

General lookup/validation

New	Open	Edit	Delete
ATSIMPORTER			
DUES_Activity (DUES_Activity)			
MEETING_Activity (MEETING_Activity)			
Name-Demo (Name-Demo)			
Name-Favorite_Things (Name-Favori			
Name-Lists (Name-Lists)			
Name-Product_Reviews (Name-Prodi			
Name-Test_Results (Name-Test_Re:			
ORDER_Activity (ORDER_Activity)			

Code	DUES_Activity
Expansion	
Description	DUES_Activity



Address Validation



- USI can identify address abbreviations by setting up Duplicate_Address_Strings general lookup table
- No need to setup reciprocal entries – it looks both ways!

General lookup/validation

New Open Edit Delete

DUPLICATE_ADDRESS_STRINGS

Ave	(Avenue)	Code	Ave
Bld	(Boulevard)	Expansion	
Cir	(Circle)	Description	Avenue
Dr	(Drive)		
E	(East)		
N	(North)		
NE	(Northeast)		
NW	(Northwest)		
Pky	(Parkway)		
Rd	(Road)		
Rt	(Route)		
S	(South)		
SE	(Southeast)		
SW	(Southwest)		
St	(Street)		
Ste	(Suite)		
W	(West)		



Company Name Identification



- Duplicate_Company_Strings general lookup table helps the USI identify abbreviations in company names

General lookup/validation

New Open Edit Delete

DUPLICATE_COMPANY_STRINGS

ATS	(Association Techno	Code	Corp
Corp	(Corporation)	Expansion	
Inc	(Incorporated)	Description	Corporation
Intl	(International)		
KFC	(Kentucky Fried Chic		



First Name Identification



- Duplicate_First_Names general lookup table helps the USI identify abbreviations/informal first names

General lookup/validation

New Open Edit Delete

DUPLICATE_FIRST_NAMES

Bill	(William)
Bob	(Robert)
Dan	(Daniel)
Dave	(David)
Don	(Donald)
Doug	(Douglas)
Ed	(Edward)
Jeff	(Jeffrey)
Jim	(James)
Melissa	(Missy)
Pete	(Peter)
Phil	(Phillip)
Rene	(Rene')
Rich	(Richard)
Stan	(Stanley)
Tom	(Thomas)

Code

Expansion

Description



Spreadsheet Preparation



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

Name/Company Import

FIRST_NAME	LAST_NAME	MEMBER_TYPE	STATUS	COMPANY	CO_MEMBER_TYPE	CO_STATUS	COPREFMAIL	COPREFBILL	COPREFSHIP	1ADDR_1	1CITY	1STATE	1ZIP	1PREFMAIL	1PREFBILL	1PREFSHIP	2 SPOUSE
Fred	Flintstone	M	A	Bedrock, Inc.	CM	A	1	1	1	100 Slate Ave.	Bedrock	CO	80202	1	1	0	Wilma Flintstone
William	Smith	M	A	Smith Parts, LLC	CM	A	1	1	1	14432 S. 52nd	Eugene	WA	98877	1	0	1	Sally Smith
Joseph	Brown	M	A	Brown's Shoes	CM	A	1	1	1	8347 Broadway	San Diego	CA	90210	1	1	1	Lisa Brown
Don	Johnson	M	A	Travel Enterprises	CM	A	1	1	1	145 N. 96th Ave.	Salem	NC	22345	1	1	1	Susan Johnson
Randy	White	M	A	Association Management	CM	A	1	1	1	1231 W. Denver Ave.	Denver	CO	80209	1	1	1	Donna White
Doug	Hunt	M	A	Prodigy Makers Int'l	CM	A	1	1	1	P.O. Box 1111	Newark	NJ	07107-2564	1	1	1	June Hunt

Demographic Imports

ID	STAFF_SIZE	FAVORITE_COLOR
140	200	Blue
199	500	Red
123	1000	Green

ID	GRADE	WRONG	DATE	INTERESTS
113	A	1	1/15/2005	A,B
113	B	0	2/10/1998	A,B,D
113	C	5	9/4/1996	B,D
113	A	9	4/5/1990	B,C,E



Required Fields for New Record Imports



- Individual Records

- First Name
- Last Name
- Member Type
- Status

- Company Records

- Company Name
- Member Type
- Status

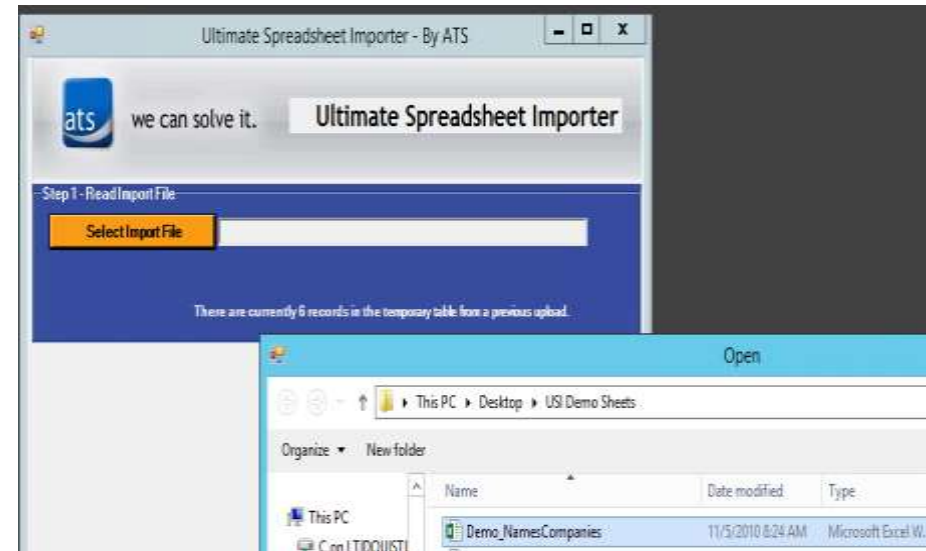
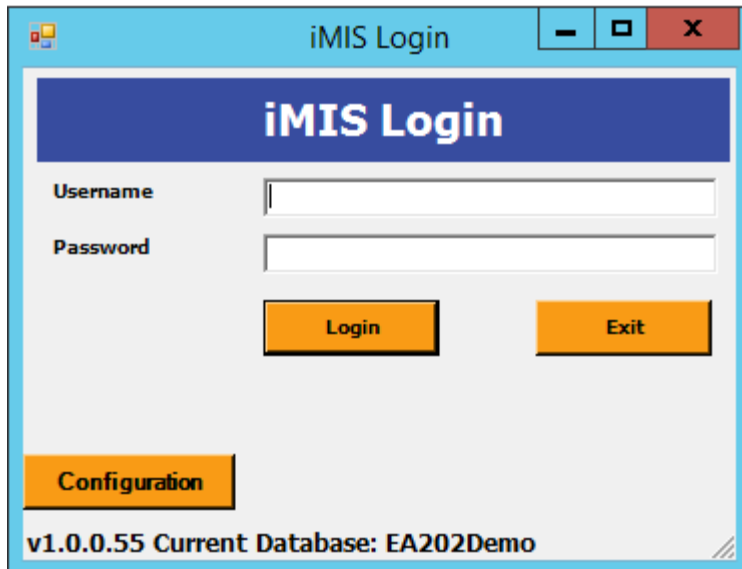


Using the Importer



Log into the USI using your iMIS login/password

Select file





Perform Field Matching



Buttons display different mapping options

Drop-downs display spreadsheet column names for matching

Match Fields

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

Company	Spreadsheet Columns	iMIS Fields
Company Address [Address]	MEMBER_TYPE	Individual iMIS ID
Company Address [Street Address]		Individual Member Type*
Company Address [Home Address]		Individual Category
Company Demographics	FIRST_NAME	Individual Status*
Company Activities		Prefix
Individual		First Name*
Individual Address [Address]	LAST_NAME	Informal
Individual Address [Street Address]		Middle Name
Individual Address [Home Address]		Last Name*
Individual Demographics		Suffix
Individual Activities		Designation
Save Matches		Title
		Company
		Home Phone
		Work Phone
		Toll Free Phone
		Fax
		Email
		Website
		Chapter
		Gender
		Birth Date
		Join Date
		Paid Thru
		Source Code
		Major Key

Next

Match Fields

Individual Address (Purpose:Address)

Company	Spreadsheet Columns	iMIS Fields
Company Address [Address]	1ADDR_1	Address Line 1
Company Address [Street Address]	1ADDR_2	Address Line 2
Company Address [Home Address]	1ADDR_3	Address Line 3
Company Demographics	1CITY	City
Company Activities		State/Province
Individual		Zip/Postal Code
Individual Address [Address]	1ADDR_2 1ADDR_3 1CITY	Country
Individual Address [Street Address]	1STATE	Phone
Individual Address [Home Address]	1ZIP	Fax
Individual Demographics	1PREFMAIL	Email
Individual Activities	1PREFBILL	Preferred Mail
Save Matches	1PREFSHIP	Preferred Bill
		Preferred Ship

Next



Demographics & Activities



Only demographic tabs and activities identified in the ATSImporter general lookup table are available

Individual Demographics

Spreadsheet Columns | **iMIS Fields**

Name-Product_Reviews | Name-Test_Results | Name-Lists | Name-Fav ◀ ▶

<input type="text"/>	▼	PRODUCT_CODE
<input type="text"/>	▼	RANK
<input type="text"/>	▼	TITLE
<input type="text"/>	▼	DESCRIPTION
<input type="text"/>	▼	REVIEW_DATE

Individual Activities

Spreadsheet Columns | **iMIS Fields**

DUES | MEETING | ORDER

<input type="text"/>	▼	Type
<input type="text"/>	▼	Transaction Date
<input type="text"/>	▼	Begin Date
<input type="text"/>	▼	Thru
<input type="text"/>	▼	Source
<input type="text"/>	▼	Amount

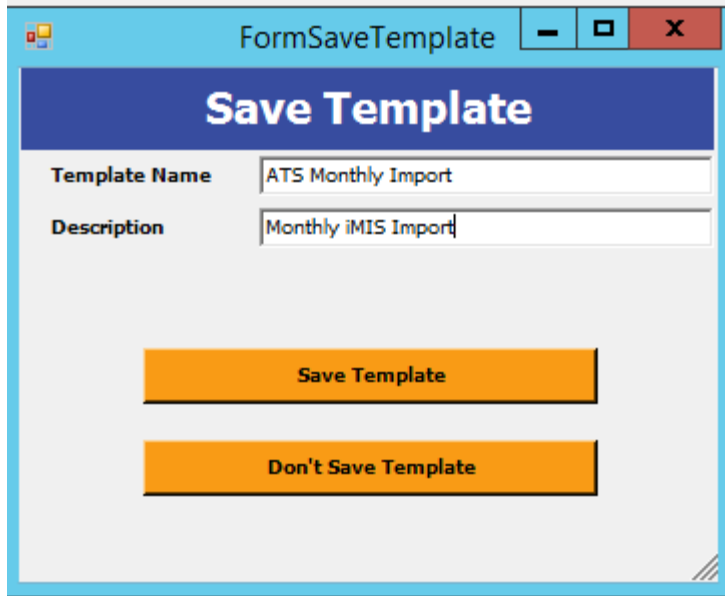


File Validation/Matching



Save Template – can be saved for future use!

Read File, Validate, Match Names



FormSaveTemplate

Save Template

Template Name:

Description:



Ultimate Spreadsheet Importer - By ATS

ats we can solve it. Ultimate Spreadsheet Importer

Step 1 - Read Input File

Select Input File:

Match Fields: Read File:

Finished reading 7 data records.

Step 2 - Validate Records

Data validation complete

Step 3 - Match Records

Names Matched: 1 Organizations Matched: 6

Names Unmatched: 6 Organizations Unmatched: 1

Matching Finished

Step 4 - Review Companies

Step 5 - Review People

v1.0.0.55 Current Database: EA202Demo



Data Review



People to Add

Company Matches

Step 1 - Read Import File

Select Import File: C:\Users\jbloukas\Desktop\MSI Demo Sheets\Demo_Names.csv

Match Fields Read File

Step 2 - Validate Records

Validate Records

Data validation complete

Step 3 - Match Records

Match Names Names Matched: 1
Organizations Matched: 0

Step 4 - Review Companies

Review Companies to Add Review Company Matches

Step 5 - Review People

Review People to Add Review People Matches

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_NAME	LAST_NAME	TITLE	COMPANY	CITY	STATE	NOTE	UPLOAD
<input checked="" type="checkbox"/>	Dot	Bolson	UP Special	Newark	NJ			<input type="checkbox"/>
<input type="checkbox"/>	Bob	Bilington	Bilington Ma	Carver	NY			<input type="checkbox"/>
<input type="checkbox"/>	William	Bilington	A New Subli	Indianapolis	IN			<input type="checkbox"/>
<input type="checkbox"/>	Edward	Herman	Herman's Pro	Los Angeles	CA			<input type="checkbox"/>
<input type="checkbox"/>	Laura	Smithers	iMIS Manage	Jupiter	FL			<input type="checkbox"/>
<input type="checkbox"/>	Paul	Wilkins	XYZ Associa	Denver	CA			<input type="checkbox"/>

Upload Checked People Close Export to CSV Check All Uncheck All

v1.0.0.55 Current Database: EA202Demo

Step 1 - Read Import File

Select Import File: C:\Users\jbloukas\Desktop\MSI Demo Sheets\Demo_Names.csv

Match Fields Read File

Step 2 - Validate Records

Validate Records

Data validation complete

Step 3 - Match Records

Match Names Names Matched: 1
Organizations Matched: 0

Step 4 - Review Companies

Review Companies to Add Review Company Matches

Step 5 - Review People

Review People to Add Review People Matches

Matched Company Records

Put a checkmark in the Sync/override column by the records that you would like to synchronize into iMIS. See previous slide for the buttons below.

Companies that are in iMIS	iMIS_ID	COMPANY	CITY	STATE	NOTE	SINGLERE
<input checked="" type="checkbox"/>	1	A New Subli	Indianapolis	IN		<input type="checkbox"/>
<input type="checkbox"/>	219	iMIS Manage	Jupiter	FL		<input type="checkbox"/>
<input type="checkbox"/>	222	ATE	Arvada	CO		<input type="checkbox"/>
<input type="checkbox"/>	217	Bilington Ma	Carver	NY		<input type="checkbox"/>
<input type="checkbox"/>	220	Herman's Pro	Los Angeles	CA		<input type="checkbox"/>
<input type="checkbox"/>	221	XYZ Associa	Denver	CA		<input type="checkbox"/>

Sync Company - Add Activities, Fill in Blank Single Instance Demographics Add Multi-Instance Demographics Only

Sync Company - Add Activities, Override Single Instance Demographics Add Activities Only

Close Export to CSV Check All Uncheck All

v1.0.0.55 Current Database: EA202Demo



Spot Check iMIS



Individual and Company records created with Company ID linking

ID 1058 Company Member Active Category

Company ID

DPI Specialties Company Sort
DPI SPECIALTIES

Prefi: First Name M Last Name Suffi:

Informal Designation Member Title

Address Street Address Home Address < >

Address P.O. Box 1111

Address 2 Status

Address 3

Newark NJ Zip

Country

Preferred Mail Bill Ship

Phone Fax

E-mail

Profile Donor Data **Status** ATS_DUES

Chapter

Join Date

Paid Through Date

Date Added 2/23/2016
Last Update 2/23/2016 10:00:30 AM
Last Updated By MANAGER

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

[-] DPI Specialties, CM, Newark, NJ
 [-] Gail Balcom, 1059, M, Newark, NJ



What's Coming to the USI?



Ability to Import and Update Usernames and Passwords

- Will create credentials for new records
- Give you the option to update credentials for existing records



How to Get It



Email help@atsol.org

- Request a new purchase quote
 - Request an upgrade



Questions & Answers



Presenter:

Tresse French

Technical Support Analyst

Association Technology Solutions, LLC

Direct: (571) 293-0827

Email: tfrench@atsol.org



Presenter:

Laura Tidquist

Technical Support Manager

Association Technology Solutions, LLC

Direct: (720) 945-7255

Email: ltidquist@atsol.org



Moderator:

Richard Banks

Sales Manager

Association Technology Solutions, LLC

Direct: (571) 213-4785

Email: rbanks@atsol.org



Presenter:

Tresse French

Technical Support Analyst

Association Technology Solutions, LLC

Direct: (571) 293-0827

Email: tfrench@atsol.org



Presenter:

Laura Tidquist

Technical Support Manager

Association Technology Solutions, LLC

Direct: (720) 945-7255

Email: ltidquist@atsol.org



Question 1:

Is the iMIS Import Utility available to everyone or is it an add-on?



Presenter:

Tresse French

Technical Support Analyst

Association Technology Solutions, LLC

Direct: (571) 293-0827

Email: tfrench@atsol.org



Presenter:

Laura Tidquist

Technical Support Manager

Association Technology Solutions, LLC

Direct: (720) 945-7255

Email: ltidquist@atsol.org



Question 2:

Can you save the package you created via the ASI Import Utility so you can test on one database and then run the identical steps against production?



Presenter:

Tresse French

Technical Support Analyst

Association Technology Solutions, LLC

Direct: (571) 293-0827

Email: tfrench@atsol.org



Presenter:

Laura Tidquist

Technical Support Manager

Association Technology Solutions, LLC

Direct: (720) 945-7255

Email: ltidquist@atsol.org



Question 3:

For multiple instances of user-defined tables, can you import additional lines? For example, row 1 = year 1, row 2 = year 2, and so on.



Presenter:

Tresse French

Technical Support Analyst

Association Technology Solutions, LLC

Direct: (571) 293-0827

Email: tfrench@atsol.org



Presenter:

Laura Tidquist

Technical Support Manager

Association Technology Solutions, LLC

Direct: (720) 945-7255

Email: ltidquist@atsol.org



Question 4:

With either option, can you only import into Name_Address and Activity or can you import into any iMIS table?



Presenter:

Tresse French

Technical Support Analyst

Association Technology Solutions, LLC

Direct: (571) 293-0827

Email: tfrench@atsol.org



Presenter:

Laura Tidquist

Technical Support Manager

Association Technology Solutions, LLC

Direct: (720) 945-7255

Email: ltidquist@atsol.org



Question 5:

Is there an easy way to copy templates in the Ultimate Spreadsheet Importer from a test database to production?



Presenter:

Tresse French

Technical Support Analyst

Association Technology Solutions, LLC

Direct: (571) 293-0827

Email: tfrench@atsol.org



Presenter:

Laura Tidquist

Technical Support Manager

Association Technology Solutions, LLC

Direct: (720) 945-7255

Email: ltidquist@atsol.org



Question 5:

Can the iMIS Import Utility de-dupe or do you have to use the Ultimate Spreadsheet Importer to get that functionality?



More from ATS



Looking for more from the experts at ATS?

Upcoming Webinars

<http://atsol.org/Webinars>

Past Webinars

<http://atsol.org/PastWebinars>

including video recordings, and downloadable presentation slides