



# mxWeb

## Administrators Guide to Importing People

Tuesday, April 20, 2004

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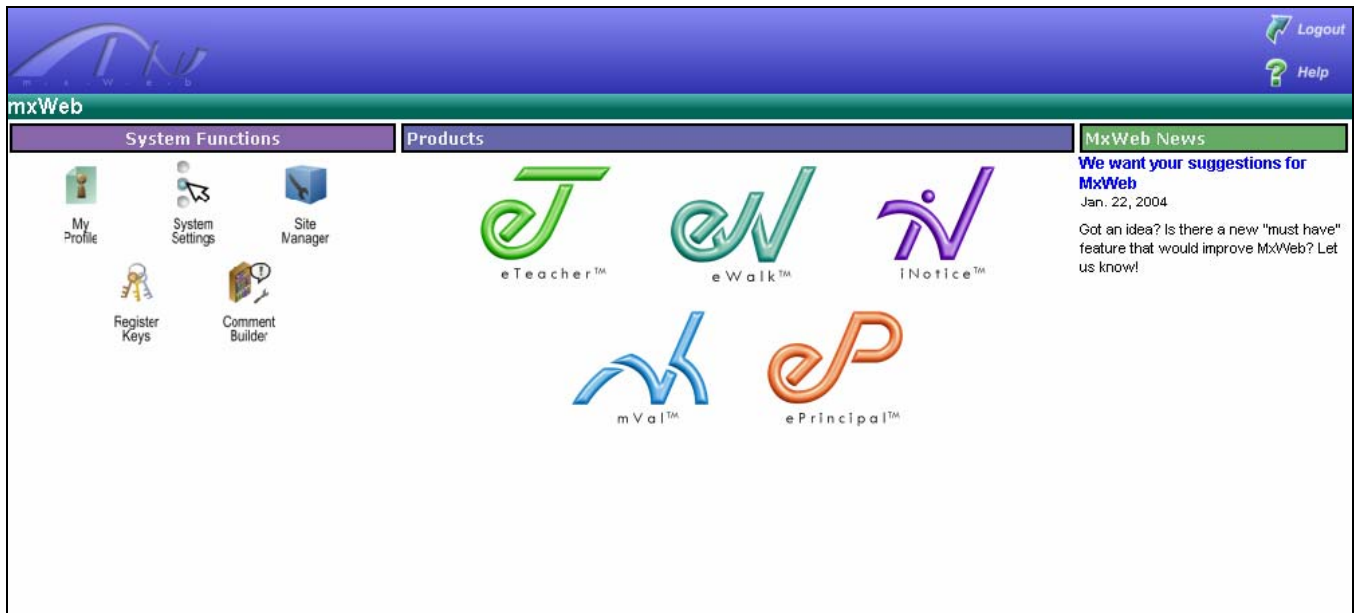


Figure 1

## Overview

The mxWeb Importer is an administrative tool which allows you to bring in data from an external source, such as your student information system, into mxWeb. It will not connect directly to any third party system, but it will take the files you generate and import them. You can use the importer to setup an entire Board with only one text file, to import your entire student lists and to create user accounts. You can also use the importer to perform regular updates of your mxWeb.

## Getting Started

### Proper Access

In order to use the import function you need to have administrative access to your site. To see what your role is click on the My Profile button on the main screen to load the Profile page.

Your Role should say Administrator Group for your school.

For the examples in this guide we will assume you are the administrator of a school, but you have not yet created any teachers or students.

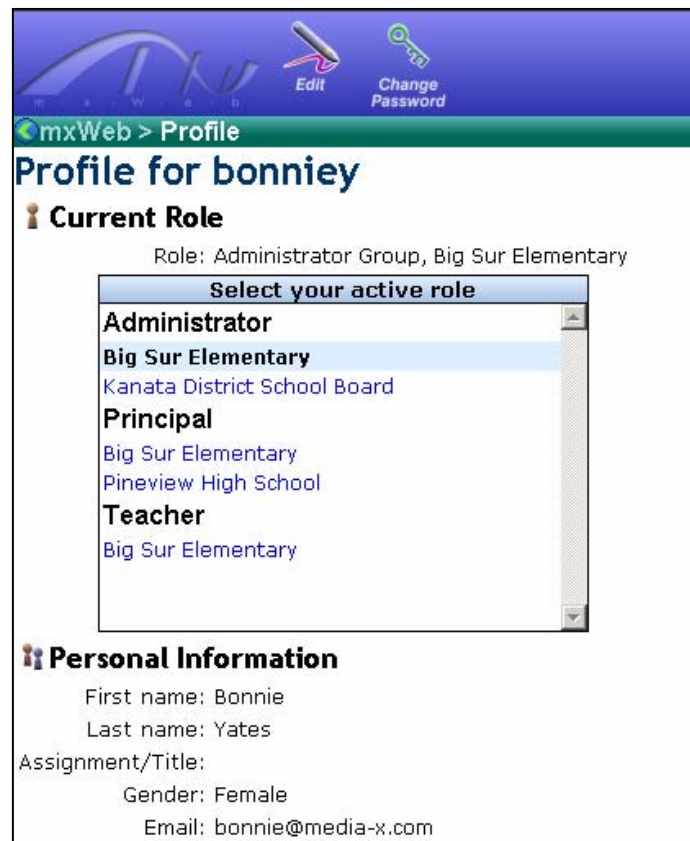


Figure 2

## Getting There



Once you have verified that you have the right privileges to import, you need to find the importer. It is located in the Site Manager.

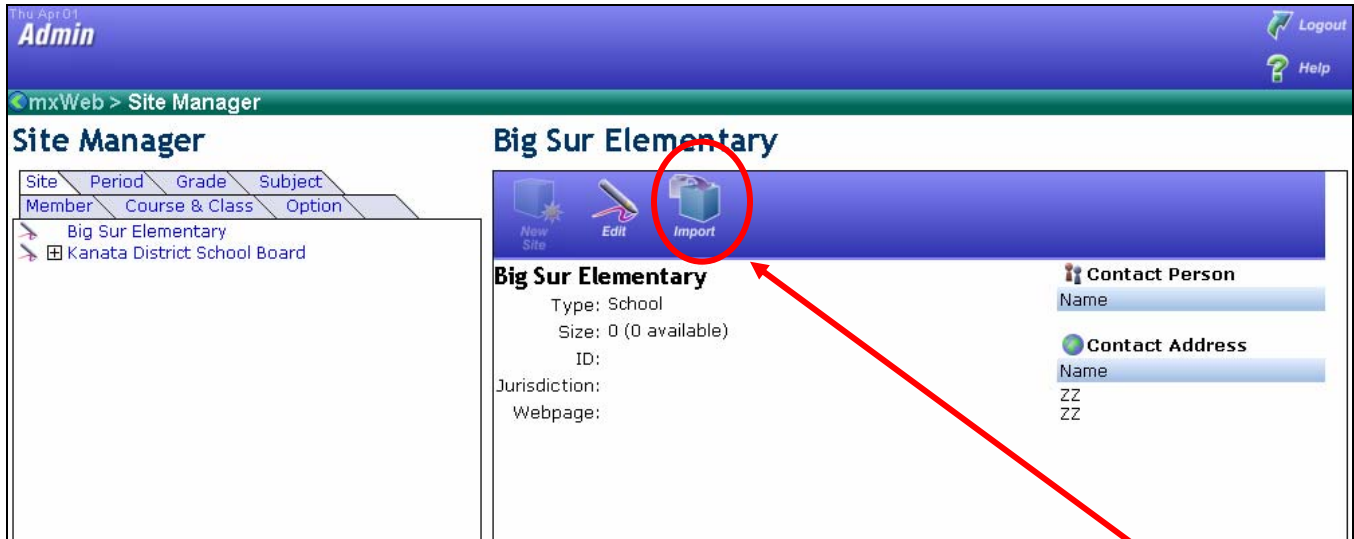
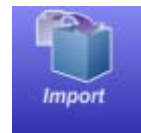


Figure 3

Click on the name of the site you wish to import into. You will see the details of your school in the site details on the right. On the sub-menu, click on the Import icon.



## Import Manager

The Import Manager is the hub of all the importing tools. From here you can manage your files, process data, and setup templates. The body of this screen lists all files and file links presently available or setup (it will be blank when you first start). Before getting too detailed, let's go over how an import works.

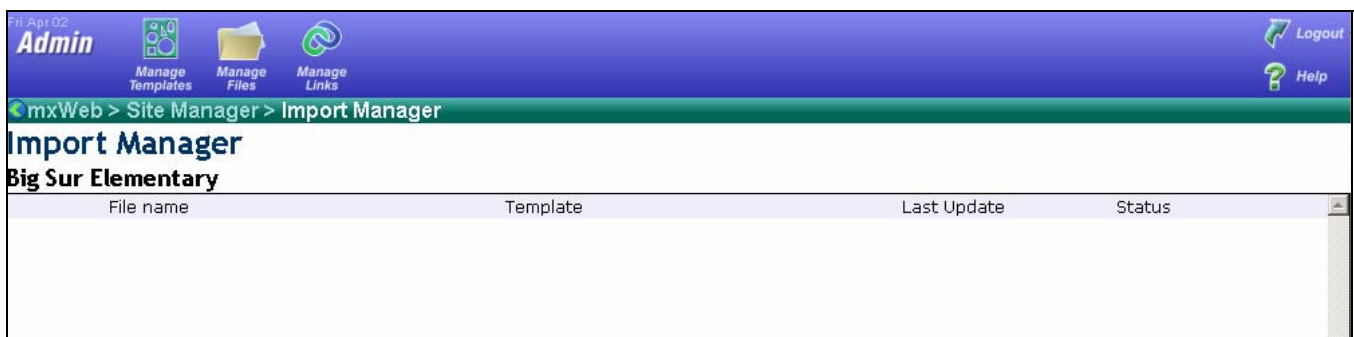


Figure 4

## Templates and the Template Manager



Before any file can be imported, the importer needs to know what the structure of the file is, what the data means, and how to handle the data. A template describes most of this information. You can create or edit templates in the Template Manager. To access it, click the "Manage Templates" button in the Import Manager.

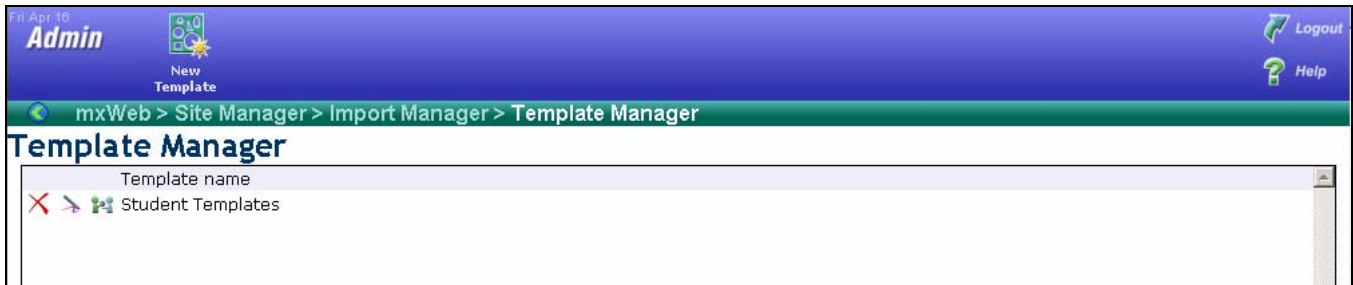
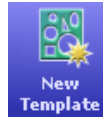


Figure 5

Here you will see a list of existing templates.

To create a new template, click on the 'New Template' icon



To edit an existing template click on the edit icon



To delete an existing template click on the delete icon



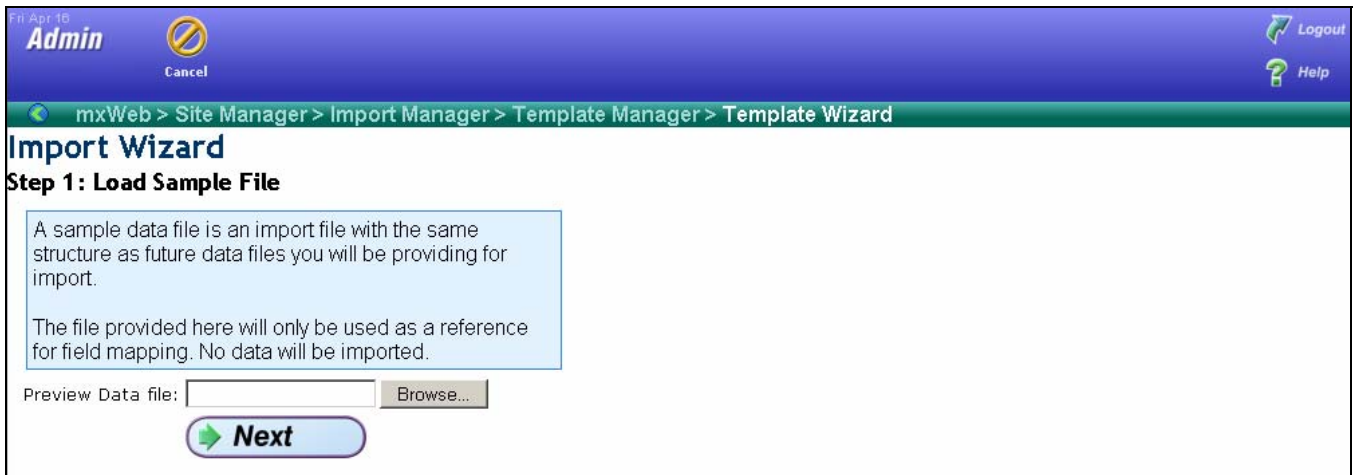
To share your template with another user click on the share icon



The process to create or edit a template is the same. Follow the steps to successfully create your templates.

## Step One: The Sample File

Clicking on new template or editing a template will launch step one of the Import Wizard.



**Figure 6**

The first step in defining a template is to load a reference file. This file will not be imported, so you don't need to worry about whether it is correct or not. It is simply a guide for you to correctly choose which field is which. At minimum, it should be in the same format as the files you intend to upload and contain the exact same fields. If you have a header row, that is ideal.

Click on the browse button to find your sample file and then click open

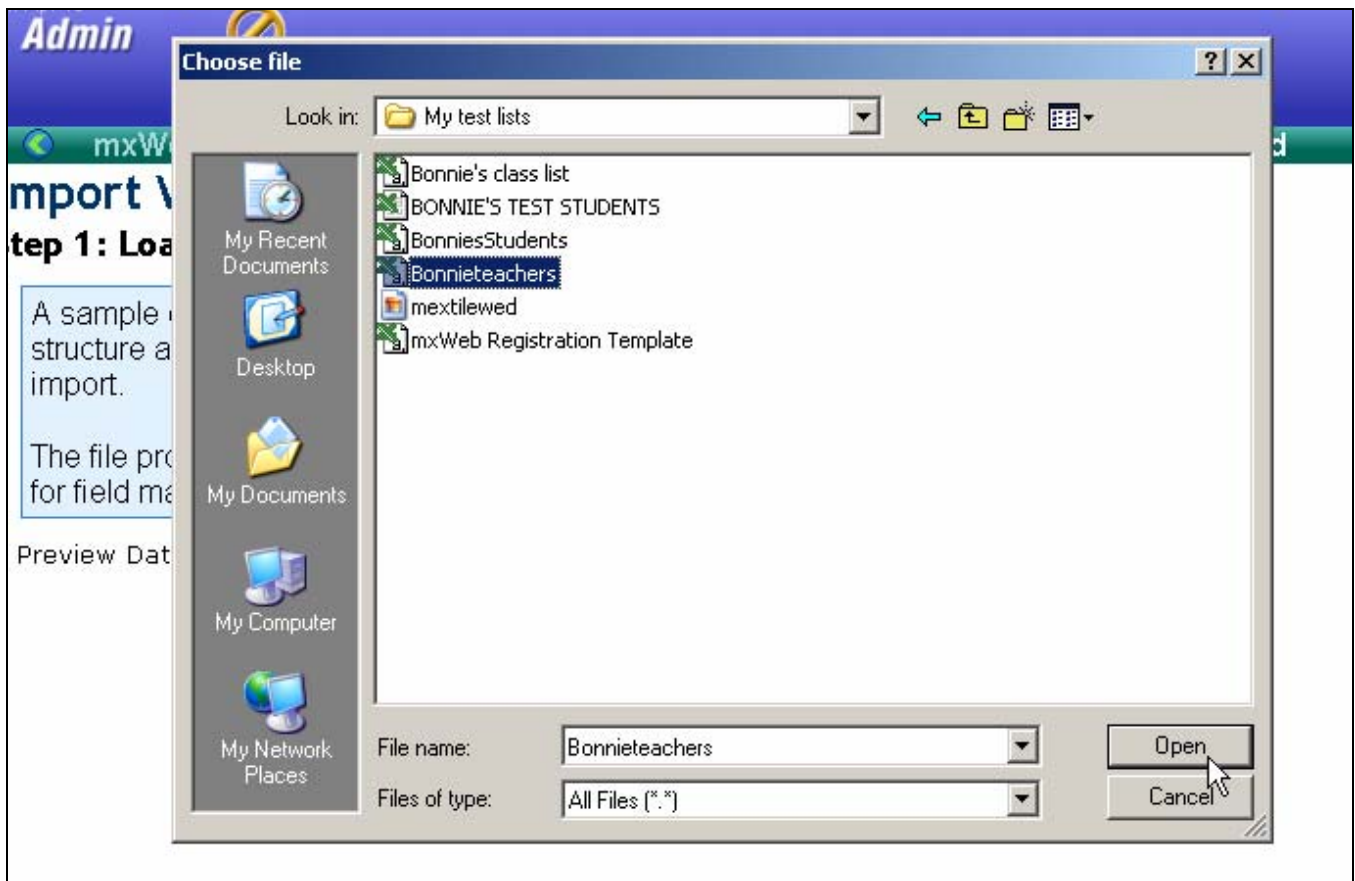


Figure 7

You will see the path to your sample file in the wizard, click 'Next' to continue.

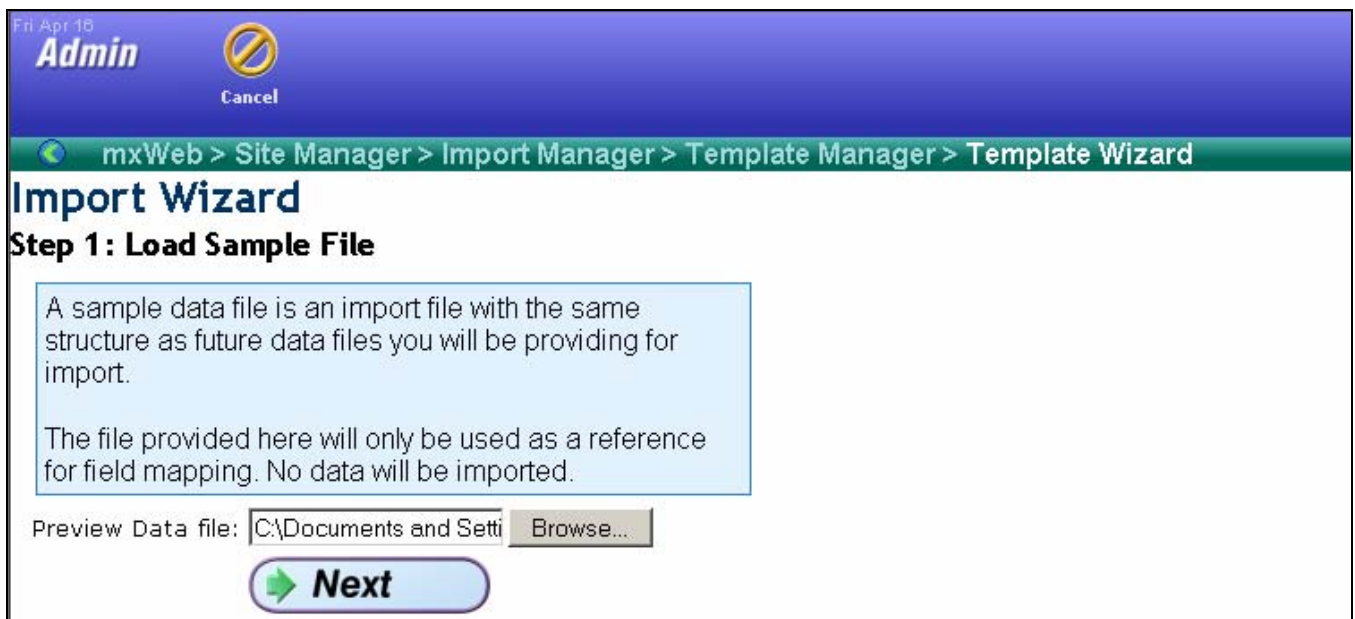


Figure 8

## Step 2: Defining the Template

Field 1	Field 2	Field 3	Field 4	Field 5	Field 6	Field 7	Field 8	Field 9	Field 10
Preferred username	First name	Last name	Gender	Title	Salutation	Email	Employee ID	Privileges	Site
	Bertram	Allell	F				3567567	T	
	Gwaihir	Anotherelf	M				2356435	T	
	Hirluin	Anotherelf	M				458456	T	
	Amiens	Ast	F				89767856787	T	
	Saruman	Badwizard	F				34634	T	
	Bilbo	Baggins	M				3464	T	
	Frodo	Baggins	M				345645367	T	
	Treebeard	Bigtree	F				567457	T	
	Meriadoc	Brandybuck	M				5467845	T	
	Adriana	Comedy	F				36756	T	
	Aegeon	Comedy	F				7864756	T	
	Aemilia	Comedy	F				478457	T	
	Gollum	Crazy	M				45684567	T	
	Arviragus	Cymbeline	F				45768568	T	

Figure 9

Once you get past the first step, a window will pop-up. It will contain your sample file with a header row indicating which field is which, by number. This will help you later when you are mapping fields. If you close it, it can be re-opened by clicking on the "View data file" link.

The **Basic Settings** box has information which you should pay close attention to.

FR Apr 16  
Admin

Cancel Save

Logout Help

mxWeb > Site Manager > Import Manager > Template Manager > Template Wizard

## Import Wizard

### Step 2: Define the Template

Using the data preview window, choose your field mappings and basic template settings.

Note that fields formatted in **this style** are required for import.

**Basic Settings**

Template name:  Has header row:

Import Site ID:  Delimiter:

**Data Categories** [View data file](#)

- Sites
- Members
- User Accounts

Figure 10


**Template name:** This is the identifier for your template and will indicate what data it is handling. In the example provided I will be importing teachers to my school.

**Has header row:** Check this off if the first row of data is actually your field names. If you don't check it off, the first row won't be skipped and you may end up with a teacher or student whose first name is 'first name'. In our example the data does have a header row (see Figure 9)

**Import Site ID:** This is a field mapping which specifies which field has the site ID. If you are importing your student or teacher list directly to your school you will want to tell the importer that 'All data belongs to same parent site'.

We will deal with importing sites and user accounts in another document.

**Delimiter:** This is the field delimiter used in your text file. CSV files will have a comma; Tab files use a tab, etc. Every time you change this setting, the data file window will update. If you see your data nicely displayed in a table with each field in its own column, you've chose correctly. If everything is bunched together in Field 1, you have the wrong delimiter. The sample file used in this document has a .CSV delimiter


**Data Categories**  [View data file](#)

Sites  
 Members

Field name	Field mapping
<b>Unique ID:</b>	Don't import ▼
First name:	Don't import ▼
Last name:	Don't import ▼
Gender:	Don't import ▼
Salutation:	Don't import ▼
Title:	Don't import ▼
Email:	Don't import ▼
<b>Privileges:</b>	Don't import ▼
<b>Student Information</b>	
Grade level:	Don't import ▼
<b>Teacher Information</b>	
Start date:	Don't import ▼
Last review date:	Don't import ▼
Next review date:	Don't import ▼
Assignment:	Don't import ▼
Assign. length:	Don't import ▼
Certification:	Don't import ▼
Note:	Don't import ▼
Category:	Don't import ▼
Status:	Don't import ▼
Activity:	Don't import ▼

## Data Categories

The data categories are the basic elements that can be imported using the importer. To make it easier to view information, you can open and close a category. Opening a category will show all the fields it can import. You will need to do this to setup the field mappings for a data category.

To setup a data category, click the  icon (if not already open). Then choose the field that matches your data for each field you have data for.

If there is a field in the data category that you do not have, simply set it as "Do not import".

Required fields (bolded in red) must be mapped to a field in order for your import to work. If the field is not required no problems will result from omitting it.

If your file has fields for more than one data category, simply choose those mappings as well. Note that some data categories are usually handled separately. For instance, sites must usually be imported separately from other

data, because their parent site is different than any other object.

Fields in red are mandatory for completion.

The screenshot shows a web browser window with a data table and a configuration panel. The table has 9 columns: Field 1 (Preferred username), Field 2 (First name), Field 3 (Last name), Field 4 (Gender), Field 5 (Title), Field 6 (Salutation), Field 7 (Email), Field 8 (Employee ID), and Field 9 (Privileges). The configuration panel below the table maps these fields to specific data categories. Fields 1, 2, 3, 4, and 9 are highlighted in red, indicating they are mandatory. The configuration includes sections for 'Unique ID', 'Student Information', and 'Teacher Information'.

Field 1	Field 2	Field 3	Field 4	Field 5	Field 6	Field 7	Field 8	Field 9
Preferred username	First name	Last name	Gender	Title	Salutation	Email	Employee ID	Privileges
	Aragorn	Nr	M				234534	S
	Arod	JRR	M				234473467	S
	Arwen	Elf	M				56895678	S
	Balin	Ick	M				456746	S
	Bilbo	Baggins	M				3464	S
	Boromir	Gondor	M				578	S
	Elessar	Elfy	M				346	S
	Elladan	Elfie	M				5678567	S
	Elrond	Halfelven	M				890678956	S
	Elms	Fli	M				35678689	S

**Field name**      **Field mapping**

**Unique ID:** Field 8

First name: Field 2

Last name: Field 3

Gender: Field 4

Salutation: Don't import

Title: Don't import

Email: Don't import

**Privileges:** Field 9

**Student Information**

Grade level: Don't import

**Teacher Information**

Start date: Don't import

Last review date: Don't import

Next review date: Don't import

Assignment: Don't import

Assign. length: Don't import

Certification: Don't import

Figure 11

When you have finished mapping the file, click 'Save' at the top of your screen to finish. You will be taken to Step 3: Template Complete. Click on Finish to return to the Template Manager (see Figure 12).

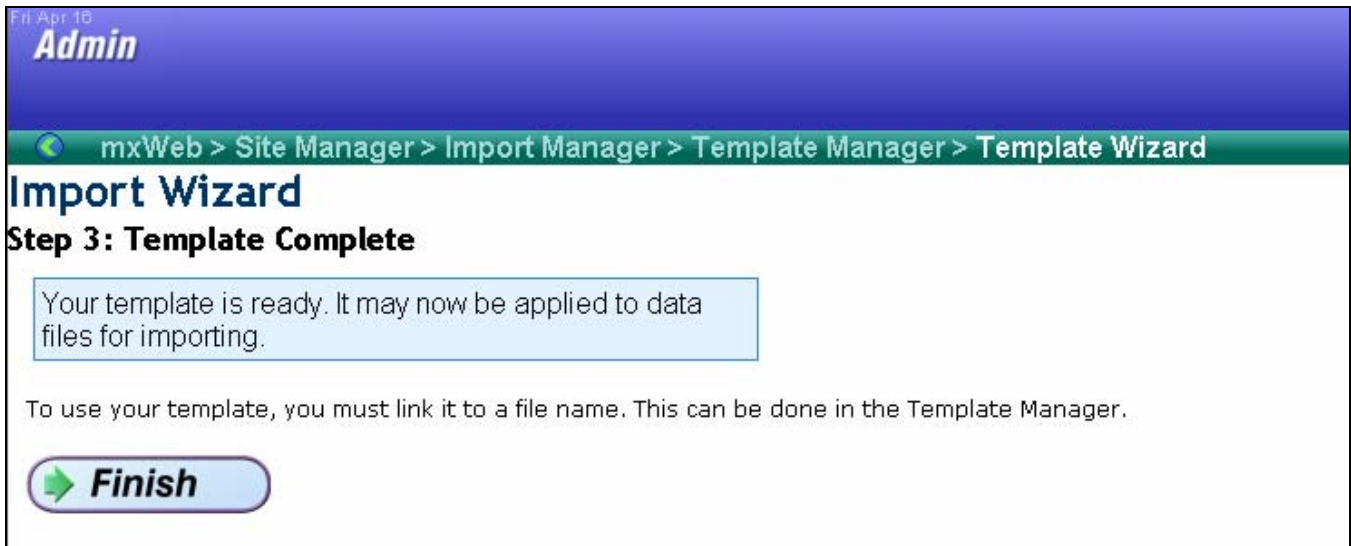


Figure 12

You will see the template you have created in the Template Manager (Figure 13).



Figure 13

To continue, go back to the Import Manager by clicking its name in the navigation bar.

## The Import Manager

Once you have created your template(s) you can now upload your data file that you wish to import.

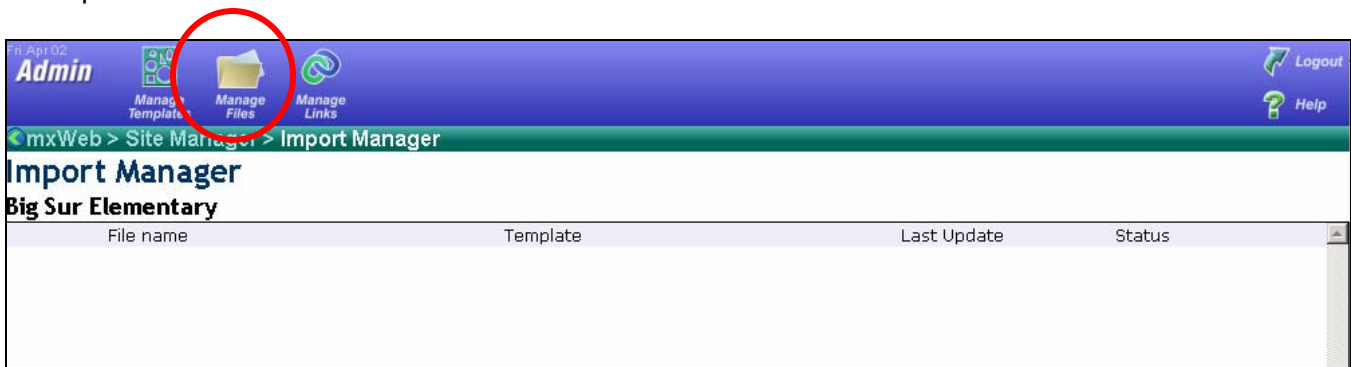


Figure 14

## Uploading Files



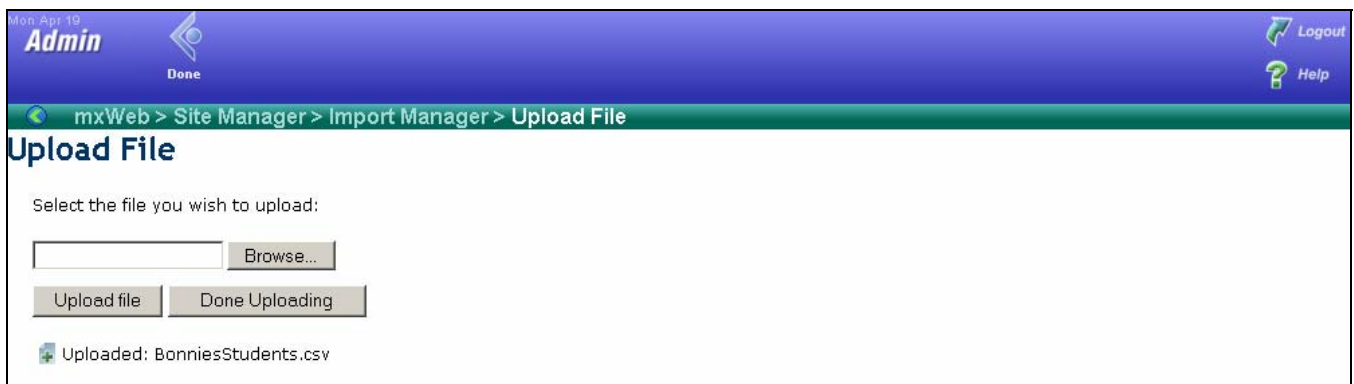
To upload a file click the "Manage Files" button (Figure 14).

Click on the Browse button to locate your data file as in Figure 8. When you have located your file click Upload file to continue.



**Figure 15**

You will see the name of your file when it has finished uploading. Click Done to exit back to the Import Manager screen. (see Figure 16)



**Figure 16**

## Linking Templates

Once you have templates defined and files uploaded, you can associate those templates to files. A file will not be imported unless a template is associated with it. Once such an association exists, you can import the data.

In the main list of the Import Manager, you will see a list of files uploaded as well as filenames that have already been setup. In the status column you can see which files need to be associated.

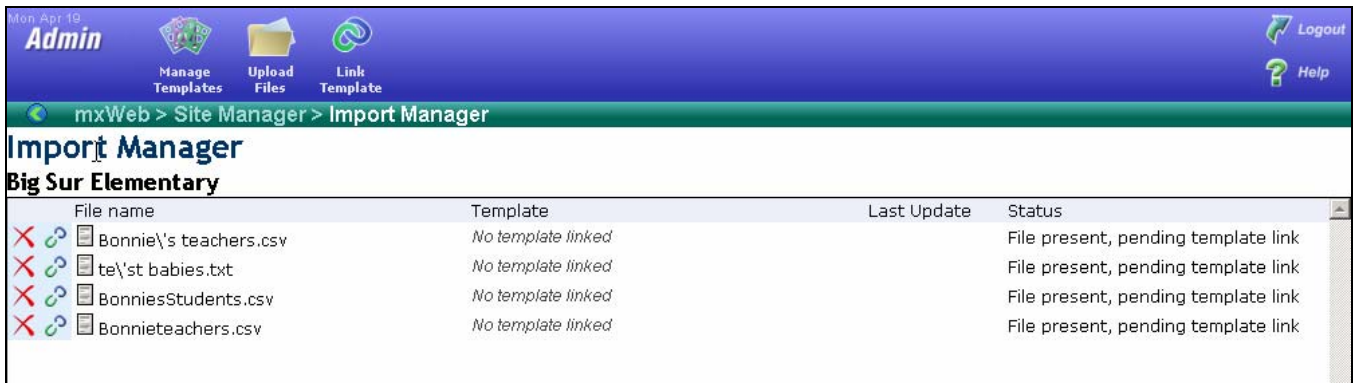


Figure 17

### Linking

To define a new link or edit an existing one, click the link icon (🔗) beside the file. On the linking page, you will see several fields.

**File name:** The file to apply the template to.

**Template:** The template to use when importing this file.

**Ignore Warnings:** If checked, it will tell the importer to ignore warning messages and import the data; if unchecked, any warning will cause that data record to not be imported.

**Synchronise:** Mostly used in large scale imports such as entire boards. For each site in the import, any memberships not in the data file will be deactivated and missing ones created or reactivated.

**Member Accounts:** This setting is used when creating User Accounts. It indicates to the importer to check the Member ID rather than the User Account when creating entries.

When should this be used? When the usernames you provide are not necessarily unique or trustworthy, but the employee (member) ID is.

Click "Link Template" when you have finished filling out the fields.

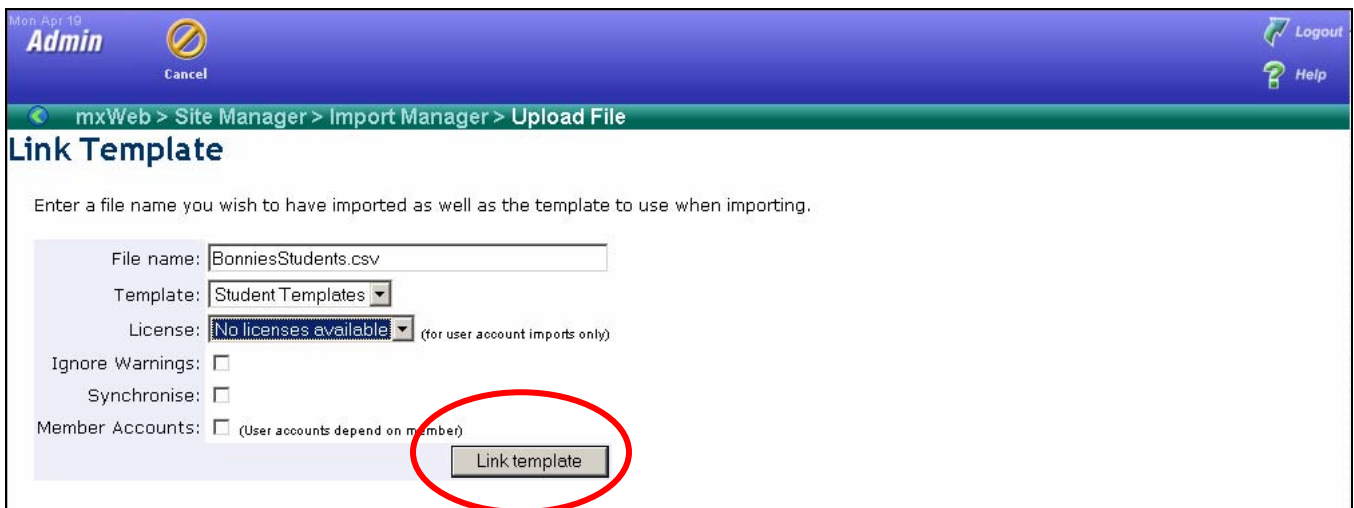


Figure 18

Admin			
Manage Templates	Upload Files	Link Template	Logout
mxWeb > Site Manager > Import Manager			
Import Manager			
Big Sur Elementary			
File name	Template	Last Update	Status
BonniesStudents.csv	Student Templates	0000-00-00 00:00:00	Pending import [Start import]
Bonnieteachers.csv	Teacher Template	0000-00-00 00:00:00	Pending import [Start import]

Figure 19

### ***Importing***

If a file has been uploaded and a template is linked to it, a “Start import” link will be present in the status column (see Figure 19). Click this to immediately import your data file.

While it is importing, no other imports may be done on that file. As well, the file will be deleted after import. When the import is complete, a message will notify you and take you to the import log screen.

### ***Import Log***

Mon Apr 19  
Admin

Reimport Log Clear Log Logout Help

mxWeb > Site Manager > Import Manager > Log Manager

### Log Manager

Big Sur Elementary  
File: Bonnieteachers.csv

Filter by code:  Go Show all Errors Warnings Alerts Success Pending

Status	Source Data
k80 TE	,Bertram ,Allell ,F,,,,3567567,T,
k80 TE	,Gwaihir,Anotherelf,M,,,,2356435,T,
k80 TE	,Hiruin,Anotherelf,M,,,,458456,T,
k80 TE	,Amiens ,Ast ,F,,,,89767856787,T,
k80 TE	,Saruman,Badwizard,F,,,,34634,T,
k80 TE	,Bilbo ,Baggins,M,,,,3464,T,
k80 TE	,Frodo ,Baggins,M,,,,345645367,T,
k80 TE	,Treebeard,Bigtree,F,,,,567457,T,
k80 TE	,Meriadoc ,Brandybuck,M,,,,5467845,T,
k80 TE	,Adriana ,Comedy ,F,,,,36756,T,
k80 TE	,Aegeon ,Comedy ,F,,,,7864756,T,

Figure 20

The import log displays all data imported from the last file. You should review this log to check for errors. The status contains a list of flags for all operations performed on that data record. Click the view icon (🔍) to see what the meaning of the codes is. The codes are also coloured by type. **Successful status flags are green, warnings orange, alerts blue, errors red.**

You can filter the list by a type of status or specific status code. Simply click one of the status category buttons to filter the list or enter the exact status code and click "Go". Click "Show All" to view the entire list again.



Click the "Clear Log" button to delete all log entries. However, if you find an error in your template, you can edit the template then return to the log and re-import the data.



Click "Reimport Log" to have the importer reprocess all the data.

To access the log at a later time, click the log icon (📄) on the file row in the Import Manager (see Figure 19).