

## Getting Started

### Proper Access

Before you even begin to use the importer, you need to know whether or not you will even be able to perform an import. To do so, you must have administrative access to a site. For our examples, we will assume you are the administrator for a school board, but you have not created any schools yet.



Additionally, if you intend to create user accounts, you will need to be a license administrator. Check the "Manage Licenses" module from the main menu to see if any licenses are listed. If you don't even see the "Manage Licenses" icon, you aren't an administrator of any licenses. In that case, you'll either need to use a different account to import user accounts or request a change in privileges.

### Getting There



Now that you know you can import, you need to know where to find the importer. It is located in the Site Manager. Click the site name you wish to import into. If you are importing a file that covers many sites, but they all have the same parent, you should click the parent site.

In the site details on the right, you will see a sub-menu. One of the buttons is called "Import". Click the button.



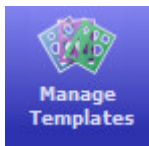
## Overview

The mxweb Importer is an administrative tool to bring data from an external source, such as student information systems, into mxweb. This tool does not connect directly with any 3rd party system, but instead takes standard text files and imports them. The importer can setup an entire board with only one text file and perform regular updates on a weekly basis. The most common data imported is sites, members, and user accounts.

## Import Manager

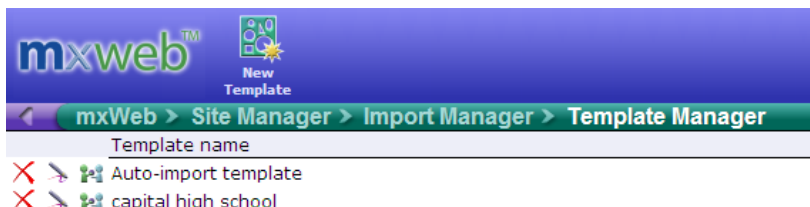
The Import Manager is the hub of all the importing tools. From here you can manage your files, process data, and setup templates. The body of this screen lists all files and file links presently available or setup. Before getting too detailed, let's go over how an import works.

## Templates



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.

Here you will see a list of existing templates. To create a new template, click the "Create Template" button in the main menu. The process to create or edit a template is the same.



## Sample File

**Import Wizard**

**Step 1: Load Sample File**

A sample data file is an import file with the same structure as future data files you will be providing for import.

The file provided here will only be used as a reference for field mapping. No data will be imported.

Preview Data file: C:\Users\Bonnie Home\ Browse...

Next

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 "Next" after you have chosen your file.

## Basic Settings

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 below.

The main screen presents all the attributes of a template. There is a box at the top that has some general settings which you should pay close attention to.

**Template name:** This is the identifier for your template.

**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 site called "Site Name"!

**Import Site ID:** This is a field mapping which specifies which field has the site ID. This is different than the site ID found in the "Sites" section below. Most objects need a parent site to be attached to and this field will be the one they use to decide that.

Generally, if you are importing sites, leave it set to "All data belongs to current site", since you want the sites to be attached to your master site. But when importing staff at a district level, choose the site ID field.

**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 chosen correctly. If everything is bunched together in Field 1, you have the wrong delimiter.

**Step 2: Using mapping**

Field 1	Field 2	Field 3	Field 4	Field 5	Field 6
Preferred username	First name	Last name	Gender	Title	Salutation
john.doe	John	Doe	M	Assistant Principal	Mr.
jane.doe	Jane	Doe	F	Principal	Mrs.

Legend

- Matching field (recommended choice)
- Matching field
- Field may be used as a matching field

Records are updated, created, or rejected based on the matching field.

**Basic Settings**

Template name:  Has header row:

Import Site ID: Choose a parent site Delimiter: Comma (,) Date format: DD/MM/YYYY

**Data Categories** View data file

- Sites
- Grades
- Subjects
- Courses
- Classes
- Marking Periods
- Members
- User Accounts


Field 1	Field 2	Field 3	Field 4	Field 5	Field 6
Preferred username	First name	Last name	Gender	Title	Salutation
john.doe	John	Doe	M	Assistant Principal	Mr.
jane.doe	Jane	Doe	F	Principal	Mrs.

## Data Categories

### Members

Field name	Field mapping	Overwrite
<b>Unique ID:</b>	Don't import ▾	<input type="checkbox"/>
Alternate ID #1:	Don't import ▾	<input type="checkbox"/>
Alternate ID #2:	Don't import ▾	<input type="checkbox"/>
<b>Privileges:</b>	Don't import ▾	<input type="checkbox"/>
	<input type="checkbox"/> Student	
Default Privilege:	<input type="checkbox"/> Teacher	
	<input type="checkbox"/> Principal	
	<input type="checkbox"/> Administrator	
<b>First name:</b>	Don't import ▾	<input type="checkbox"/>
Middle name:	Don't import ▾	<input type="checkbox"/>
<b>Last name:</b>	Don't import ▾	<input type="checkbox"/>
Gender:	Don't import ▾	<input type="checkbox"/>
Salutation:	Don't import ▾	<input type="checkbox"/>
Title:	Don't import ▾	<input type="checkbox"/>
Date of birth:	Don't import ▾	<input type="checkbox"/>
Email:	Don't import ▾	<input type="checkbox"/>
Home phone:	Don't import ▾	<input type="checkbox"/>
Street line 1:	Don't import ▾	<input type="checkbox"/>
Street line 2:	Don't import ▾	<input type="checkbox"/>
Street line 3:	Don't import ▾	<input type="checkbox"/>
City:	Don't import ▾	<input type="checkbox"/>
Province/State:	Don't import ▾	<input type="checkbox"/>
Postal code:	Don't import ▾	<input type="checkbox"/>
Country:	Don't import ▾	<input type="checkbox"/>

The data categories are the basic elements of a site 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”.

If the field is not required (as indicated by the bold red text labels), no problems will result from omitting the field. Required fields, however, must be mapped to a field in order for your import to work.

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.

### User Accounts

Field name	Field mapping	Overwrite
<b>User name:</b>	Don't import ▾	<input type="checkbox"/>
Email:	Don't import ▾	<input type="checkbox"/>
First name:	Don't import ▾	<input type="checkbox"/>
Middle name:	Don't import ▾	<input type="checkbox"/>
Last name:	Don't import ▾	<input type="checkbox"/>
Gender:	Don't import ▾	<input type="checkbox"/>
Salutation:	Don't import ▾	<input type="checkbox"/>
Title:	Don't import ▾	<input type="checkbox"/>

## Completing the Template

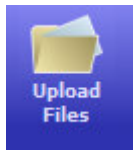
When you are finished, click “Save” at the top.

This takes you to the completion screen which notifies you that your template is ready. Click “Finish” to return to the Template Manager.

To continue, go back to the Import Manager using the navigation bar.

## Uploading Files

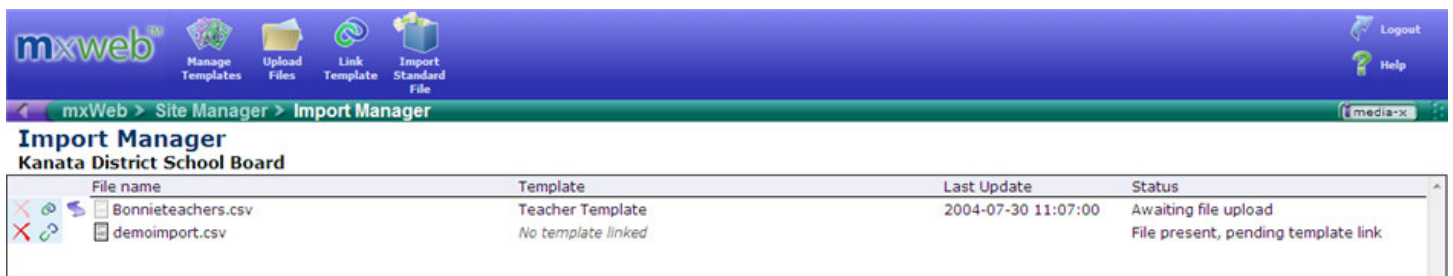
Once you have a template created and before any import can occur, a file must be available to import. This can be done through FTP (if setup) or directly within mxWeb.



To upload a file using the Import Manager, click the “Upload Files” button. This will take you to a screen with a simply file field. Simply choose a file and then click the “Upload File” button. The file will then be uploaded to your site folder. You can repeat this as many times as you have files. Click the “Done” button when you are finished.


## 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.

## 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.

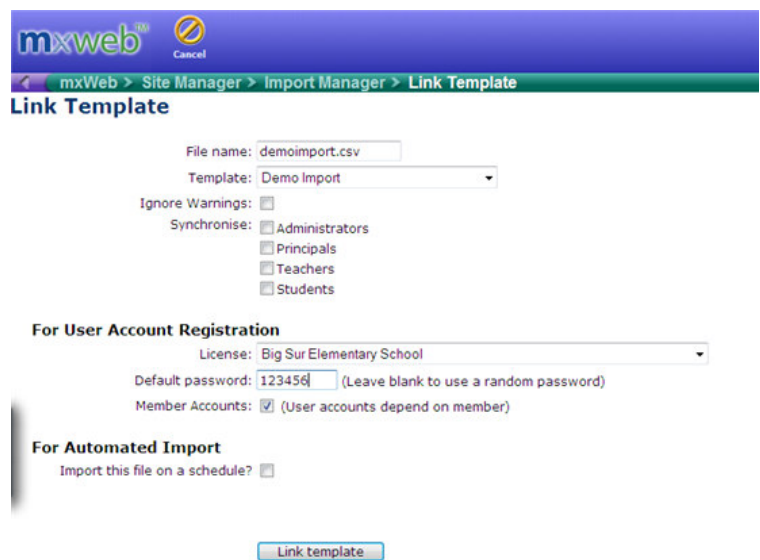
**File name:** The file to apply the template to.

**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.

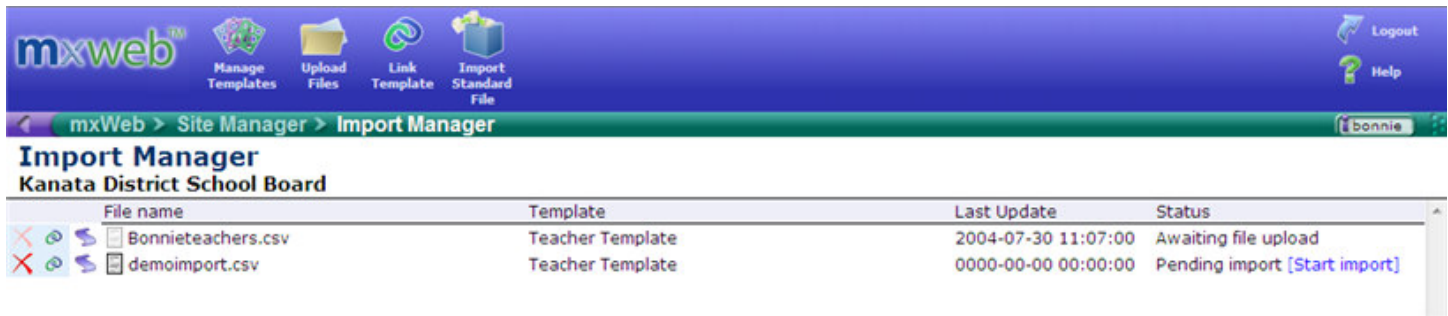
Click “Link Template” when you have finished filling out the fields.

For user creation you must select a license. If you choose to not create a default password a random one will be assigned to users on import.



## 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. Click this to immediately import your data file.

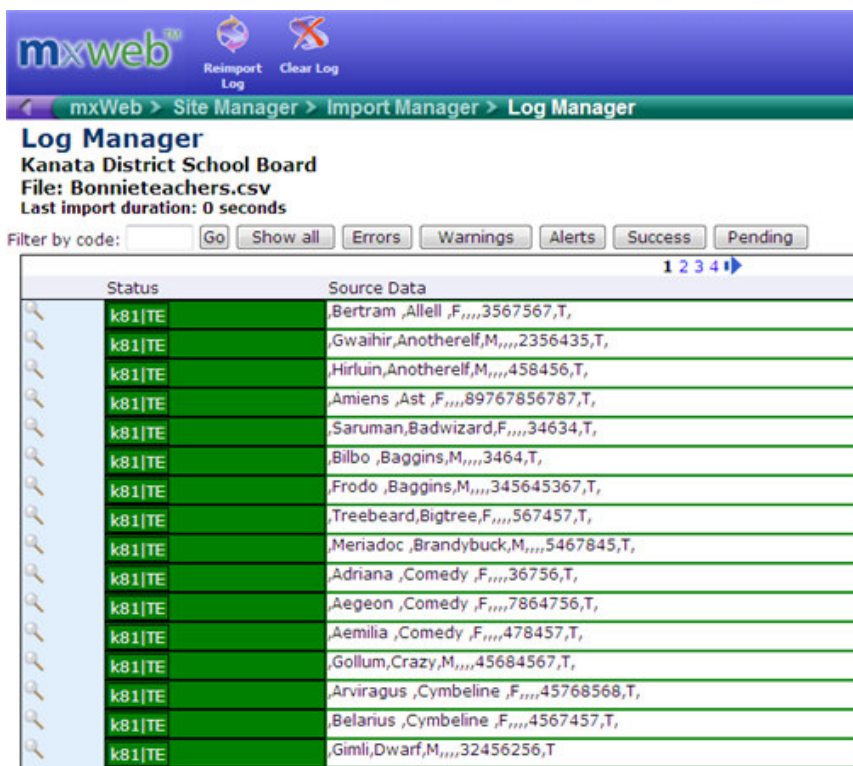


While it is importing, no other imports may be done on that file. As well, the file will be deleted after import. When the import is complete, a message will notify you and take you to the import log screen.


## Import Log



The import log displays all data imported from the last file. You should review this log to check for errors. To access a log file for a particular import click on the icon indicated in the photo to the right.

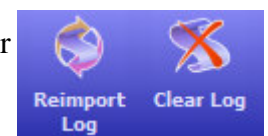


The status fields contains a list of flags for all operations performed on that data record.

Click the view icon  to see what the codes mean. The codes are also coloured by type. Successful status flags are green, warnings orange, alerts blue, errors red. A full list of codes and meanings are contained at the end of this document.

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.

## User Accounts

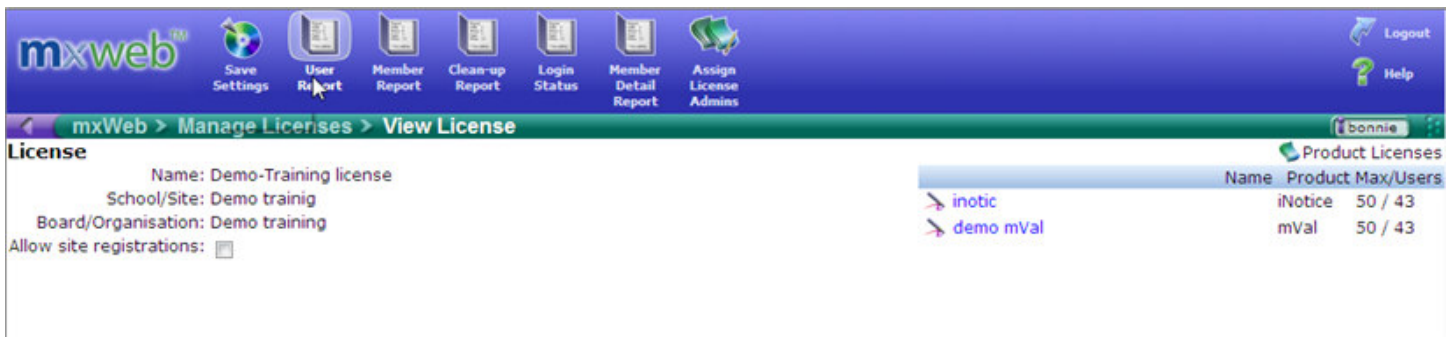
Any time user accounts are imported, the login information is stored in a note for the data row in the import log. However, this information is also available to the license administrator.



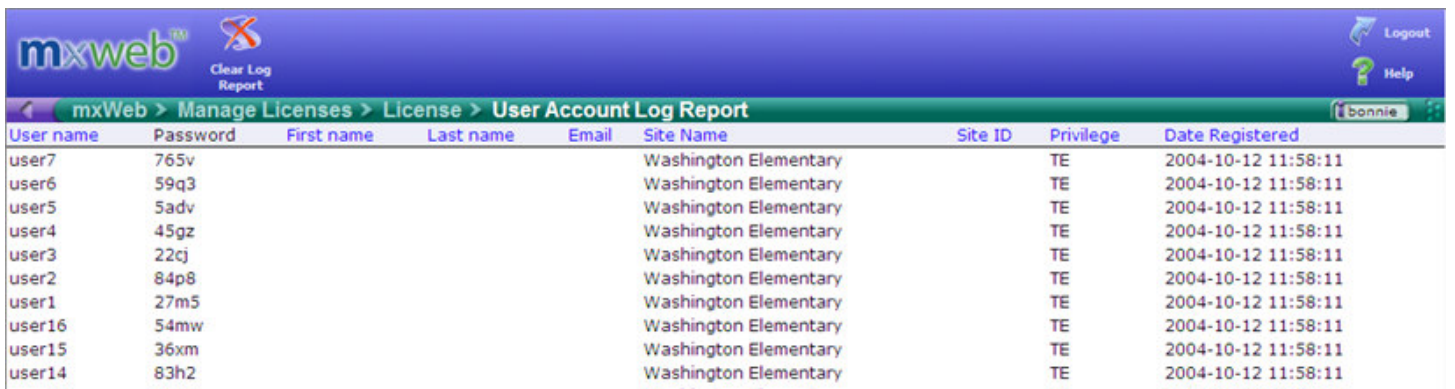
Go to the “Manage Licenses” section from the main mxWeb menu and click on your license to access the reports.



Click the “User Reports” button.



This will take you to a report screen with all user accounts created, the date imported, site, and primary role in that site. Note that not all sites the user is associated with are listed and also that the password displayed is the original password. Subsequent changes by the users will not be reflected.



## Error Codes and Meanings

The following alert, error, and warning messages may be found in the post-import report for a source data row. Errors halt processing of the data row while warnings may or may not halt processing, depending on the setting in the template link.

Code	Type	Category	Report Message
n	Status	General	No action taken
p	Status	General	Pending import
w1	Warning	General	Too few fields in source data
w2	Warning	Person	Invalid gender; must be M or F
a13	Alert	Site	Deleted site undeleted
w10	Warning	Site	Site name missing
w11	Warning	Site	Invalid level, must be one of SCH, BRD, or RGN
k10	Success	Site	Site successfully created
k11	Success	Site	Site successfully updated
f10	Error	Site	Can not import site data; unique identifier missing
f11	Error	Site	Can not import site data; missing name
f12	Error	Site	Can not import data; parent site not found
f13	Error	Site	Can not create site; parent site full
f14	Error	Dataset	Can not import dataset linked data; no active dataset for import site
k20	Success	Grade	Grade successfully created
k21	Success	Grade	Grade successfully updated
f20	Error	Grade	Can not import grade data; unique identifier missing
w32	Warning	Subject	Duplicate subject name in site
k30	Success	Subject	Subject successfully created
k31	Success	Subject	Subject successfully updated
f30	Error	Subject	Can not import subject data; unique identifier missing
f31	Error	Subject	Can not import subject data; missing primary data

			elements
w42	Warning	Course	Duplicate course name in site
k40	Success	Course	Course successfully created
k41	Success	Course	Course successfully updated
f40	Error	Course	Can not import course data; unique identifier missing
f41	Error	Course	Can not import course data; missing primary data elements
w52	Warning	Class	Duplicate class name in site
k50	Success	Class	Class successfully created
k51	Success	Class	Class successfully updated
f50	Error	Class	Can not import class data; unique identifier missing
f51	Error	Class	Can not import class data; missing primary data elements
w62	Warning	Period	Duplicate marking period name in site
k60	Success	Period	Period successfully created
k61	Success	Period	Period successfully updated
f60	Error	Period	Can not import marking period data; unique identifier missing
f61	Error	Period	Can not import marking period data; missing primary data elements
a70	Alert	User	User accounts dependent on members
a71	Alert	User	User account linked to member not changed; import data ignored
a72	Alert	User	User account already assigned to member; import data ignored
k70	Success	User	User successfully created
k71	Success	User	User successfully updated
f70	Error	User	Can not import user account; unique identifier missing
f74	Error	User	Can not create user account; license is full
f75	Error	User	Can not update user account; insufficient privileges

f76	Error	User	Can not create user account; license is invalid
f77	Error	User	Can not create user account; username too short or missing
w85	Warning	Member	Can not link student to teacher; teacher does not exist
w86	Warning	Member	Can not link student to grade; grade does not exist
k80	Success	Member	Member successfully created
k81	Success	Member	Member successfully updated
f80	Error	Member	Can not import member; unique identifier missing
f87	Error	Member	Invalid role; unknown role types for member found
w101	Warning	Link	User account assigned to member does not match
f100	Error	Link	Can not link user account to license; insufficient privileges
f101	Error	Link	Can not link user account; user account does not exist
f102	Error	Link	Can not link user account to member; insufficient privileges
k121	Success	Link	Grade successfully linked to course
f120	Error	Link	Can not link grade; grade not found in active site
k131	Success	Link	Subject successfully linked to course
f130	Error	Link	Can not link subject; subject not found in active site
f140	Error	Link	Can not link course; course not found in active site
k151	Success	Link	Class successfully linked to course
f150	Error	Link	Can not link class; class not found in active site
k161	Success	Link	Marking period successfully linked to class
f160	Error	Link	Can not link marking period; marking period not found in active site
k171	Success	Link	Member successfully linked to user account
f170	Error	Link	Can not link user account; user account not found
k181	Success	Link	Member successfully linked to class

f180	Error	Link	Can not link member; member not found in active site
k201	Success	Link	User account successfully linked to license
f200	Error	Link	Can not link license; license does not exist or is not administered by importing user
f201	Error	Link	Can not link license; license has maximum number of users assigned to it
f300	Error	Image	Could not import image; file not found
f350	Error	Image	Could not create image handling object
f351	Error	Image	Error importing image
w300	Warning	Image	Image not imported; image file not specified
w301	Warning	Image	Image not imported; specified image could not be found
k300	Success	Image	Image imported successfully