



Import

Making it easier to get data in.

Objective



- ⦿ Enable the importing of different types of data directly through the application.
- ⦿ Support for data being delivered in a variety of formats and layouts to maximize ease of use for end user.
- ⦿ Improve turn-around time of data import requests.
- ⦿ Allow for more frequent importing of data.





- ⦿ New Data Manager Role
- ⦿ New Task for Data Manager called *User Refresh Import* for submitting User Refresh files to WhippleHill.
- ⦿ New Task for Data Manager called *Data Import* for submitting other types of data imports.

Data Manager Menu

Data Manager

Tasks

Data Import

User Refresh Import

User Refresh Import



- Provides screen for viewing previously submitted jobs as well as adding new.
- When creating new Refresh job, application checks to make sure files and columns within the files are correct. By programatically checking at upload time the Data Manager can find out right away if files are correct, reducing back and forth between WhippleHill and client.
- More secure then delivering the files through e-mail.
- In future will also be further automating back-end processing of the User Refresh job.

New User Refresh Import

Platform Manager >> User Refresh Import >> **New**

User Refresh Import Cancel Validate Only Save & Exit

Once file has been submitted it will be reviewed for data integrity. Once file has been reviewed it will be scheduled for off hours processing. Please check *User Refresh Import* task for status of the import. Complete processing may take 1 - 5 business days.

Refresh Type:

Student File:

Parent File:

Relationship File:

View Supported File Layout(s) for "Student & Parent" Refresh

Notes:

Viewing Previously Submitted

Platform Manager >> **User Refresh Import**

Job History Search Cancel View

Refresh Type: From: To:

Status:

Search Results						New
Date Created	Refresh Type	Created By	File	Notes	Status	
8/1/2005 4:00 PM	Parent & Student	John Smith	Data File	Notes	Processed	
12/1/2007 3:31 PM	Alumni	John Smith	Data File	Notes	In Review	
8/1/2006 3:45 PM	Parent & Student	John Smith	Data File	Notes	Submitted	Cancel
8/3/2007 2:35 PM	Parent & Student	John Smith	Data File	Notes	In Process	

Data Import

- Architecture put in place to allow for “Import Types” to be defined by WhippleHill and made available to the Data Manager through the Data import Task.
- Each Import Type has a number of different File Layouts it accepts. Import Engine programatically chooses correct one based on fields provided in the file.
- Data in file validated to make sure and fields that reference lookup data are correct.
- Row level error checking with any errors found reported back in the original data file on the row with the error.

Import Types

Platform Manager >> Data Import

Data Import Types		
Academic Groups		
Academic Section	File Layout Help	Job History Add New Job
Academic Section Enrollment	File Layout Help	Job History Add New Job

Add New Import

Import CSV Records Cancel Save & Exit

Import Type: [File Layout Help](#)

Job Name:

Import File:

Validate Only Validate and Process

View Import History

Job History Search Cancel View

Import Type: [File Layout Help](#) From: To:

Status:

Search Results

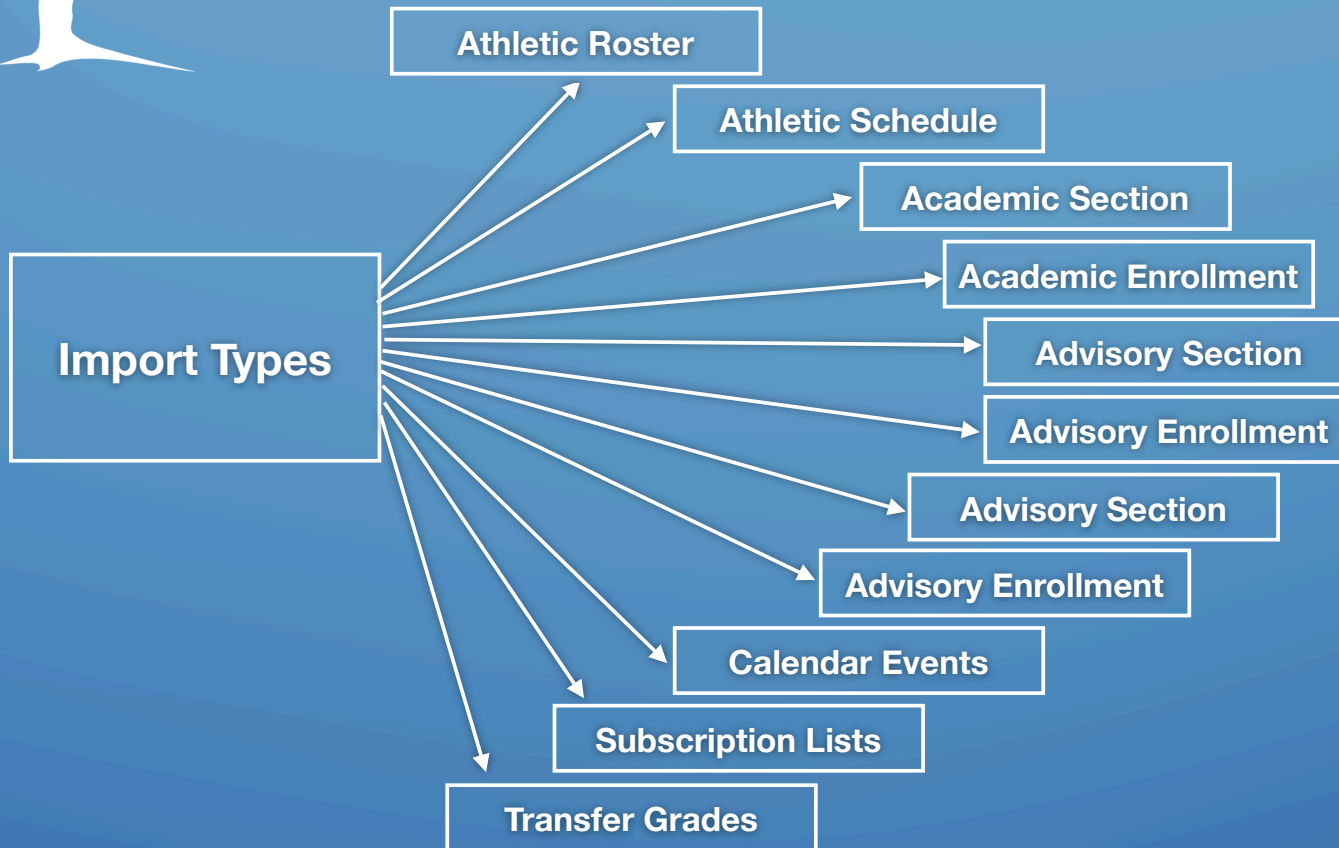
Create Date	Job/User	Status			
3/9/2007 12:40:24 PM	Section Enrollment 07 by: John Smith	Failed Validation	Validated File	Job Details	Cancel
3/1/2006 12:30:22 PM	Section Enrollment 06 by: Jane Doe	Processed	Validated File Processed File	Job Details	Delete
3/14/2007 2:26:01 PM	Section Enrollment 07 2 by: John Smith	Validated	Validated File	Job Details	Cancel

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Data Import

Import Types



Timeline

