

Importing Data into Connect-ED Contacts

1. To import data into Connect-ED, your file needs to be saved as a comma delimited file (.csv)
 - Save your data in *Excel* as it can easily be saved as a comma delimited file.
 - You can export your data from *FileMaker Pro* as a comma delimited (.csv) *Excel* format.
 - The provided sample spreadsheet is already in the correct format for an upload to Connect-ED.
2. The column headers for your Excel file **must match** the Connect-ED fields **exactly** in order for the import to work correctly.
 - Insert a row for your headers into your Excel file above your data.
 - Highlight row 1
 - Go to **Insert** on the Menu bar
 - Select **Row**
 - Type in the names of your fields **EXACTLY** as they appear on the Data Fields in Connect-ED document.
 - Some common fields you are likely to use are:

▪ ReferenceCode	Student ID
▪ FirstName	Student first name (not necessary with Student ID)
▪ LastName	Student last name (not necessary with Student ID)
▪ ContactType	Choose from: Student, Faculty, Admin, Other, Alumni
▪ HomePhone	Primary home phone number
▪ WorkPhone	Primary parent work phone
▪ MobilePhone	Primary parent mobile phone
▪ HomePhoneAlt	Alternate home phone number
▪ WorkPhoneAlt	Alternate parent work phone
▪ MobilePhoneAlt	Alternate parent mobile phone
 - A **REQUIRED** field for each import file is “ReferenceCode” which is the student ID or employee number. The “ReferenceCode” is required for each import, as this is the unique identifier for both staff and students.
 - Before you upload your spreadsheet make sure that any columns **with header fields** that do not contain data are deleted from the spreadsheet. If the spreadsheet is uploaded with a column header and blank information is in that column, all of this information will be overwritten with blanks on the Connect-ED site.
3. Once you login to your Connect-ED account, your spreadsheet can be uploaded by clicking the “Contacts” tab



and clicking the “Import Contacts” button.



- Now, use the “Browse” button to locate the file you wish to upload on your computer.

What To Do:	How it Works:
1. Select your data file	1. Click BROWSE to the right 2. Select your file for import 3. Click OPEN

- Next, choose the correct contact type (Faculty, Other, or Students) and click on the “Advanced Options” to expand the options. Also, make sure that you check “Preserve Data” under the “Advanced Options.”
 - Faculty = all staff
 - Students = all students
 - Other = outside volunteers who are not part of the MCPS

2. Select the Contact Type	Select the type of data included in your file. Select ALL if you want to import data of multiple types at once. If you select ALL , your data file must include the ContactType column header.	<input type="button" value="Please Select One"/> ▾
Options for Advanced Users	Provides the ability to manage your updates in more detail.	Hide Advanced Options
3. Remove Contacts Not Provided	Any records of the Type(s) you select on the right that are NOT provided in this import file will be removed from your account. For example, if you select Admin and Faculty, any Admin or Faculty contacts currently in your NTI Connect-ED account that are not in this import file will no longer be available for messaging. More info...	<input type="checkbox"/> Admin <input type="checkbox"/> Alumni <input type="checkbox"/> Faculty <input type="checkbox"/> Other <input type="checkbox"/> Student
4. Update Provided Columns Only	Check this box if you only want to update the fields that are provided in this import file. Any columns not provided will NOT be modified. Any fields that are provided with blank data for a contact will be cleaned out. *ReferenceCode is a required column when selecting this option. If you do not check this box, ALL data related to the provided contacts will be replaced. More info...	<input checked="" type="checkbox"/> Preserve Data

- Last, click the “Import” button at the bottom of the page.



4. Connect-ED will then import the spreadsheet that you identified. If there is an error in your spreadsheet, Connect-ED will let you know via a message after the import. If any of your information does not upload, it will be very important to download the error file to see why file was rejected. At this point you can fix the error in the spreadsheet and re-import it as directed above.