**Automated Import Setup Worksheet**

**Introduction**

To streamline the transfer of student data, Symplicity offers its clients the option to integrate with a Registrar or SIS system by utilizing Secure File Transfer Protocol (SFTP).

When using this method, the client creates a standard import file and writes a script to automatically send the file to a Symplicity hosted SFTP dropsite. Symplicity then creates a custom script to import the file on a predetermined schedule into the client’s Symplicity system. Enterprise clients can use a single file to populate multiple systems as well.

Symplicity can schedule the import to run daily, weekly, or monthly but no more than once per day. Please note, for a daily import clients must send “delta” files that only include data updates since the last time the file was created. The full file can still be sent on less frequent intervals if desired by the client.

If data needs to be imported less often than once per month it is recommended to use the Symport tool on the manager interface to import the data.

In order to begin the automated import development process, please answer all of the questions below and return this document to your Symplicity representative.

**SFTP Dropsite Access**

1. **Please send the IP address of where the file will be coming from.** *This will allow Symplicity to grant access to the SFTP dropsite. A maximum of 5 IPs can be accepted.***199.8.26.10**
2. **Please enter Contact Information for who will be accessing the dropsite.** *This is usually the IT person that will be handling the file exchange. A Symplicity representative will contact this person with instructions on accessing the SFTP dropsite****.***[**Konrad.willmert@indwes.edu**](mailto:Konrad.willmert@indwes.edu) **765-677-2048**

**File Information**

1. **Please indicate the type of file that will be sent.** *Supported file types include CSV, Text (delimited and fixed width), XML, and Excel (pre 2007 format, not .xlsx). Any regular delimiter (tab, comma, pipe) is supported.*

**\*Please Note:**In order to create the import script, the production file must be available in the dropsite. Sample files can be sent for requirements- gathering and to set up mapping, but any development work must use the actual file.  
**CSV**

1. **What is the file name?** *The file name cannot change after the import script has been created without prior notice. If there are going to be cases where the file name changes each time it is sent please let us know. Clients should create a script to remove any files that were entered previously and replace with the new file.***iwu-person-data.csv**
2. **What data value in the file should be set as the unique identifier?** *Usually this is Student ID or Email Address. This is used so that duplicate data records are not created when the import runs.***IWU\_ID**
3. **Please indicate the multi-value separator in your data file?** *This is used to import into multi-select fields. This needs to be consistent throughout the file and there cannot be more than one. Common multi-value separators are symbols such as “,” or “;”. Please note the multi-value separator should not be used in a selection for any field that uses a picklist. For example if a Major has a comma in it then comma should not be used as the multi-value separator in the import file.***|**

**Please send the hierarchical delimiter (If applicable).** *This is used for hierarchical picklists for example in the “Major” field. The most common hierarchical delimiter is “/”. Please note the hierarchical delimiter should not be used in the label for any field that uses a hierarchical picklist.***N/A**

1. **What is the date format?** *The import file should have a standard format for dates. We support any of the following but there should not be more than one used. The date in the example is May 1, 2010.*
   1. **Month / Day / Year (i.e. 05/01/2010)**
   2. **Year / Month / Day (i.e. 2010/05/01)**
   3. **Day / Month / Year (i.e. 01/05/2010)**
2. **Please send us the mapping for each field in the file.** *In a separate document please send a list of every field that is in your data file along with the tab and label of where each field needs to be imported to in the student profile.*

**Example of mapping:**

|  |  |
| --- | --- |
| **File Header** | **Symplicity Field** |
| ID | Student ID |
| GP\_NAME | Full Name |
| GP\_LASTNAME | Last Name |
| GP\_FIRSTNAME | First Name |
| GP\_MIDDLENAME | Middle Initial |
| Email | Email |
| College | Student Profile: College |
| student\_lvl | Student Profile: Class Level |
| Gender | Gender |
| line\_addr1 | School Address: Street Address |
| line\_addr2 | School Address: Street Address |
| city\_name | School Address: City |
| state\_cd | School Address: State |
| zip\_cd | School Address: Zip Code |
| cntry\_cd | School Address: Country |
| DOB | Birthdate |
| cum\_gpa | Student Profile: GPA |

**Automated Import Functionality Requirements**

1. **Please let us know the frequency of the import.** *The choices are daily, weekly, or monthly. Daily imports require an update file that only includes data changes. The full data load must be no more than once per week.*

*If anything other than daily is selected please specify when the import should occur. All imports run at approximately 4am EST and the file should be sent to the dropsite before this time.***Daily – However unable to produce file until ~6am EST**

1. **Please let us know how to handle blank fields in the file.** *Should we ignore and keep any data in that field or overwrite and clear the field? For example if a student has “Psychology” listed in their Major field but the file that is imported has a blank value should it keep “Psychology” or change the field to be blank.***Blanks should overwrite data**
2. **If applicable, please list any other requested requirements for the import script.** *For example the import script can be configured to automatically archive or disable student accounts if there is not a match found in the file.*