

## **Quick Reference: How to use the Inquiry Import Tool**

You can use the Inquiry Import tool in the Admissions application to import inquiry/applicant information from one or more files in a single batch.

## Using the Inquiry Import tool:

1. Open the Admissions application and click **Maintenance** > **Imports** > **Inquiry Import**.





2. Click New on the Inquiry Import screen.

Edit Tools Help					
Name	City	State	Year	Grade	Errors
		••••••			
		•			
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		0			
		•			
		•			
		••••••			
is Import				Entrie	es for this Import
Post Delete Save	Legend			Ne	ew Edit Delet
omatically Add					
Potential Duplicates	Schools not on File				
Companies not on File	Referrals not on File				



3. Specify the necessary information in the following fields on the Inquiry Import screen.

Inquiry Import	
File	
Defaults	
School Applying	Kindergarten 👻
Admiss Yr	2014
Inquiry Type	<b></b>
Catalog	Inquiry 👻
Inquiry Date	10-17-2014
Application Rec'd	10-17-2014
File	c:\users\cweinfuss\desktop\wid\doc_items\doi
Import Map	test - (Delimited)
	OK Cancel
	NUM

- a. In the **File** field, select the appropriate .csv file.
- b. If you have an existing Import Map that you would like to use, select it now and proceed to <u>Step 5</u>. Otherwise, proceed to <u>Step 4</u> and create a new Import Map.

Fields	Description
School Applying	* Enter the division of the school.
Admiss Yr	Enter the Admissions year.
Inquiry Type	Enter the Inquiry Type
Catalog	Enter Catalog type
Inquiry Date	Enter Inquiry Date
Application Rec'd	Enter Application Received date
File	*Select your .csv file
Import Map	*Select an existing Import Map, or create a new
	one.

\*Indicates required field



4. If you do not currently have an Import Map, you'll need to create one. On the Import Map List screen, click **New**.

Name	Description	New
		Edit
		Delete
		Сору

a. Enter the appropriate information into the following fields:

Fields	Description
Name	* Enter the Name of the Import Map
Description	Enter a Description of the Import Map
Begin	*Enter a Begin Delimiter
End	*Enter an End Delimiter
Last End	* Enter a Last End Delimiter
Records to Skip	Select Records to Skip
View Record No	Select View Record No

\*Indicates required field

Name Import Map	Description	Import Map	
Field Mapping Delimiters: Begin 🔎 👻 Ei	nd , 👻	Last End , Records to Skip View Record No	< < 2 > >>
Senior Inquiry Fie	eld	Import Field/Data	
Last Name	-	)-1	New
Birth Date		2) -	
Circl Marrie		3] •	
First Name		,	
Preferred Name		I) -	Paste



b. The Senior Inquiry Field column provides a drop-down list of all of the predefined Senior Systems Inquiry Fields that are supported by the Inquiry Importer tool. The Import Field/Data column drop-down menu provides Inquiry Fields that are pulled in from the .csv file that you selected previously. The Last Name field displayed in the screen capture below is a required field and is provided by default.

port Map (Inquiry Import) - c:\users\	ateway.csv: Delimited	Σ
lame Import Map D	scription Import Map	
Field Mapping Delimiters: Begin , - End ,	► Last End ,  ► Records to Skip  View Record No	2 >>>
Senior Inquiry Field	Import Field/Data	A
Last Name 🗾	1)-1	New
Birth Date		
First Name	Last Name is required	
Preferred Name		Paste
Middle Name	15]-	

- c. Click the drop-down menu on the **Import Field/Data** column to select an Import Field for Last Name. If you do not see the Import fields in the drop-down, you may need to adjust your delimiters to **Begin = , End =,** and **Last End = ,**
- d. Click **New** to add more fields to the Import Map.

me Import Map	Description	mport Map		
eld Mapping velimiters: Begin , 💌 End	. <b>•</b> I	st End , 🔹 Records to Skip	0 View Record No << < 2 > >>	
Senior Inquiry Field		Import Fi	ield/Data	
Last Name	[1]	1		New
Birth Date	2			Cut
First Name	3			Cui
Preferred Name	4			Paste
Middle Name	5			
Suffix	6			



e. You can optionally click **Print** on the Import Map screen to print a PDF or physically print to paper a list of fields that you have selected for your Import Map:

me	Inquiry Map Des	cription				
ield	Mapping					
Delin	niters: Begin 👻 End ,	Last End ,  Precords to Skip 0 View Record No ≪ < 1 >>>				
	Senior Inquiry Field	Import Field/Data				
	First Name	45) - app_fn	New			
	Preferred Name	48) - app_nickname				
	Middle Name	47) · app_mn	Cui			
	Suffix	52) - app_suffix	Paste			
	Student EMail	44) - app_email				
	Birth Country	61) - CountryOfBirth				
	Sex (F/M)	50) - app_sex				
	Native Language	66) · HomeLanguage				
	Citizen Country	137) - OtherCitizenship				
	Visa Type	292) - VisaType				
	Visa Number	37) - AlienRegNum				
	Current School Address Line 1	258) - School_Name				
	Current School Address Line 2	253) · School_Address2				
	Current School Address Line 3	254) - School_Address3				
	Current School City	255) - School_City				
	Current School State	259) - School_State				
	Current School Zip	262) - School_ZipCode				
	Current School Country	256) - School_Country				
_	Describerto Calcaral	100 00-LI N 0				

- f. Once you have entered all of the necessary fields, click **OK** to save the Import Map that you have created.
- 5. On the Inquiry Import screen, click **OK** to run the import.

ile		
Defaults		
School Applying	Kindergarten 👻	
Admiss Yr	2014	
Inquiry Type	•	
Catalog	Inquiry 👻	
Inquiry Date	10-17-2014	
Application Rec'd	10-17-2014	
File	doc_items\928_planning\gateway\gateway	.csv 🔍
Import Map	Import Map - (Delimited)	-
	ОК	Cancel





6. The Inquiry Import List provides details about the import. The following options are available on this screen:

Fields	Description
Post	Post inquiries to the database
Delete	Delete inquiries from the table
Save	Save inquires in the table
Legend	Review information provided in the table
Potential Duplicates	Automatically add potential duplicates
Companies not on File	Automatically add companies not on File
Schools not on File	Automatically add schools not on File
Referrals not on File	Automatically add referrals not on File
New	Add more inquiries to the table
Edit	Edit inquiries in the table
Delete	Delete inquires in the table

Name	City	State	Year	Grade	Errors
1			2012		
2			2012		
is Import				Entries	for this Import
Post Delete Save I	_egend			New	Edit Delete
tomatically Add					
Potential Duplicates	Schools not on File				
Companies not on File	Referrals not on File				

7. When you are satisfied, click **Post** to import the new inquires.