

How to Create a File for Import - Opt-Out=No, Inactive=No (Default)



identiMetrics™

Cheat Sheet

The following are instructions to create a file for import into identiMetrics when the Properties setting are set to the Default: **Opt-Out=NO, Inactive=NO.**

Refer to the **Quick Reference Guide for Opt-out and Inactive Data Fields**

for complete information about setting Properties options to optimize use in your organization.

- In order for identiMetrics to import the data successfully, the data must be in a standard ASCII text file (.csv or .txt) and must be in the correct format.
- The file can only contain enrollment records (i.e. not header records) and there can only be one person's record per line.
- Each line must contain the fields: **Last Name, First Name, Middle Name, ID, Level 1, and Level 2.**
 - The user 'ID' field must be the same number that **the host application** is expecting for that person's record.
 - Level 1 and Level 2 create organization and/or hierarchy in the database. We recommend using one level as a Location or School Name and the other level as the student's grade or the word Staff for faculty.
- The **Middle Name** field can be blank, but you **MUST** include the delimiter for that field to act as a placeholder.
- The fields must be separated from each other by either a single **tab** or a **space**.
- If you use the **comma and space** as a delimiter, there can be NO commas in the fields themselves.
- Each field may be surrounded by **double-quotes**. Use these when you are using the **comma and space** delimiter, and one or more of the fields might contain a comma. Without the **double-quotes**, identiMetrics will get confused by the extra commas.
- If you choose to put **double-quotes** around each field then there can be NO **doublequotes** in the fields themselves (e.g. "O"Malley" would be incorrect).

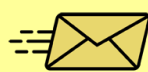
Sample import file format:

| Last Name | First Name | Middle Name ID | ID | Level 1 | Level 2 |
|-----------|------------|----------------|--------|-----------------------|---------|
| Smith | Will | | 333724 | Franklin Elementary | 02 |
| Henderson | Courtney | A | 888124 | Franklin Elementary | 05 |
| Jones | Henry | Scott | 712548 | District Office | Staff |
| Jackson | Sarah | Emily | 215783 | Jefferson High School | Staff |

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