

WELCOME!

Import Essentials
for CONNECT Users

Trainer for today...

**Mark Morman,
EMT Senior Training Specialist**

University of Dayton: BA, MA Training and Development

7 years Software Training Experience

5 years with Hobsons: Former EMT Account manager

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My Details

Shows the attendee name and Satisfaction Rating. Attendees can change their Satisfaction Rating by clicking on the drop-down arrow

Webinar Info

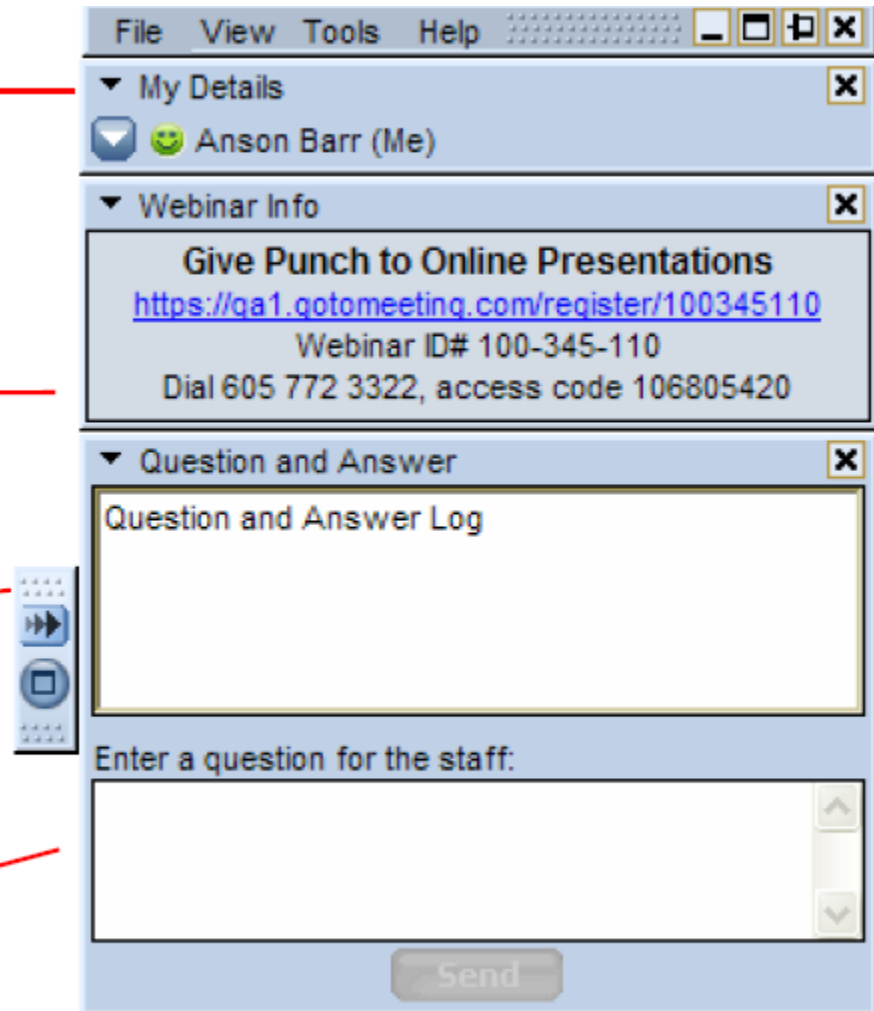
Provided for quick reference

Grab Tab

Enables attendees to minimize the Control Panel to the side of their desktops and still access Viewer tools

Question and Answer

If turned on by an organizer, attendees can submit questions and review answers. Broadcast messages from an organizer will also show here



AGENDA

Identify 5 Ways Data Can Enter CONNECT

Create a Comma Separated Value File (.CSV)

Explore the Import Wizard

Work with Rejected Records

Learning Objectives

- Create and Manage a .CSV file to prepare for importing
- Navigate through the CONNECT Import Wizard
- Analyze the import scenario to choose the most appropriate Attribute Mapping and Update Conditions
- Find and re-import Rejected Records

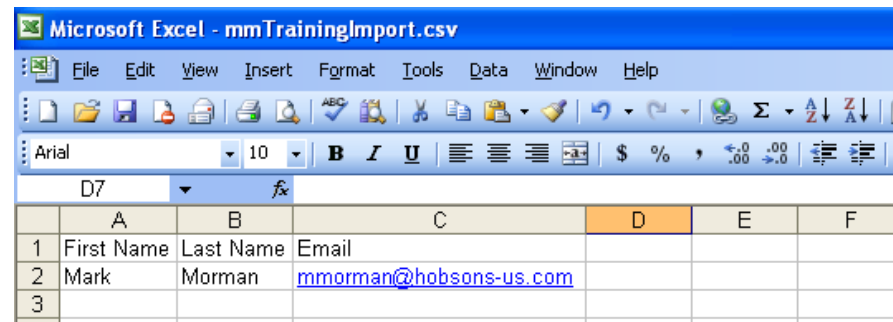
Poll: What experience do you have with student data and imports

5 Ways Data Can Enter CONNECT

1. Hand Entered Data: **ex. Reply Cards**
2. Submitted Through an Interest Page:
ex. Online Information Request Form
3. Submitted Through a Survey:
ex. Campus Visit Evaluation
4. Automated Data Feed / Bridge:
ex. Automated regular sis exports to the SFTP Server
ex. AY application bridge to CONNECT
5. Manual Import: **ex. List of student lead names**

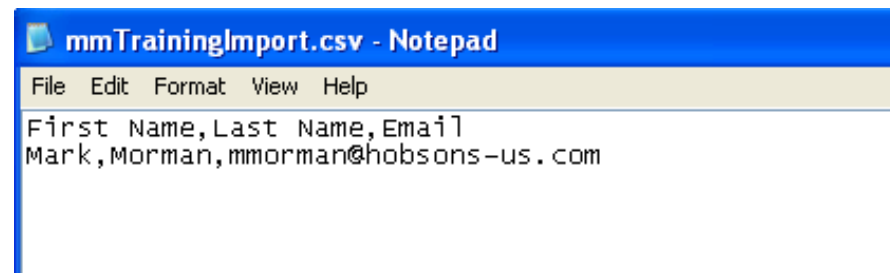
Making the Training CSV file using Excel

- Create the CSV file in Excel



	A	B	C	D	E	F
1	First Name	Last Name	Email			
2	Mark	Morman	mmorman@hobsons-us.com			
3						

- Review the CSV file in Notepad



```
mmTrainingImport.csv - Notepad
File Edit Format View Help
First Name,Last Name,Email
Mark,Morman,mmorman@hobsons-us.com
```

LEARN HOW TO IMPORT IN CONNECT

Import : Who to Update?

Record



Update Conditions

- SSN
- ID (CONNECT)
- Login (VIP)

CONNECT



Import : How to Update?

Imported File



Mappings & Rules



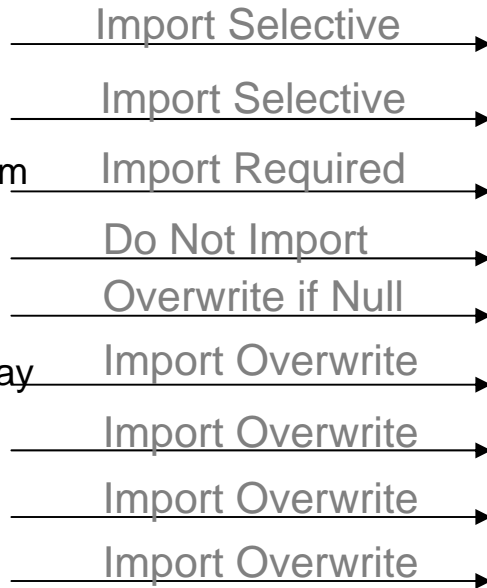
EMT Record

FName	Import Selective	→	First Name
LName	Import Selective	→	Last Name
E-mail	Import Required	→	E-mail
HS GPA	Do Not Import	→	HS GPA
ACT score	Overwrite if Null	→	ACT score
Address	Import Overwrite	→	Address
City	Import Overwrite	→	City
ST	Import Overwrite	→	State / Province
Zip	Import Overwrite	→	Zip

Import: The Result

Input File values

Sue
 Leong
 sleong@gmail.com
 3.5
 26
 50 E Business Way
 Cincinnati
 45241



EMT values

Susan.....
 Leong.....
 sleong@gmail.com...
 3.0.....
 29.....

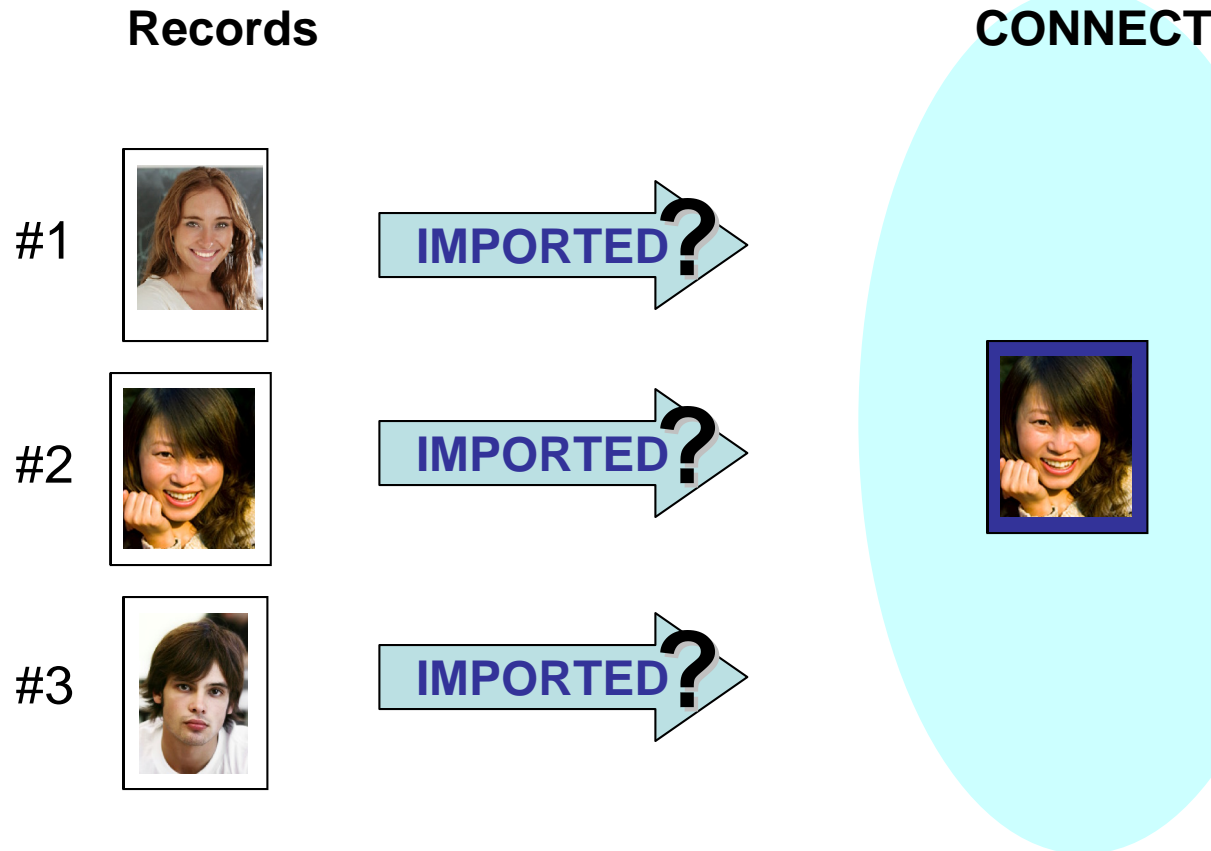
 Dayton.....
 OH.....



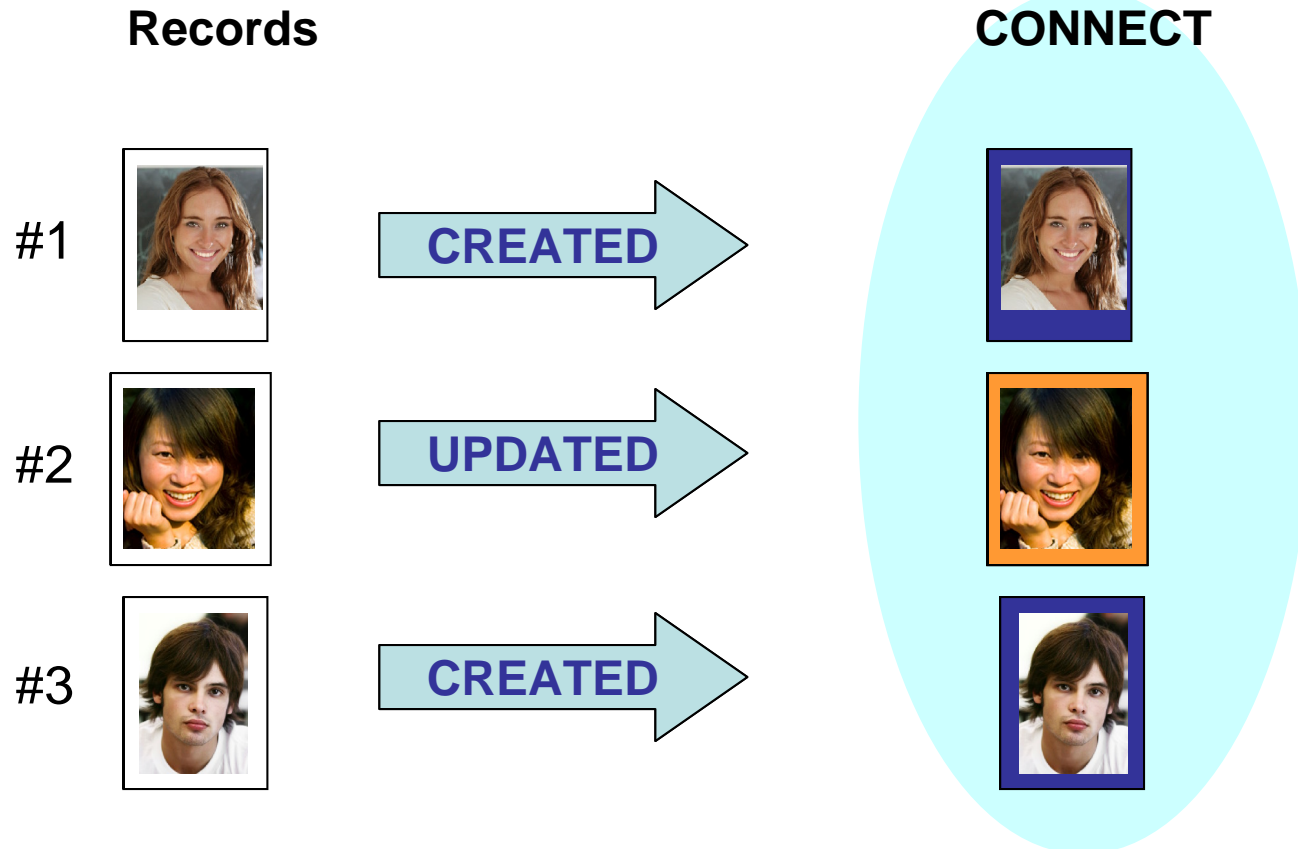
Sue
Leong
sleong@gmail.com
3.0
29
50 E Business Way
Cincinnati
(null)
45241



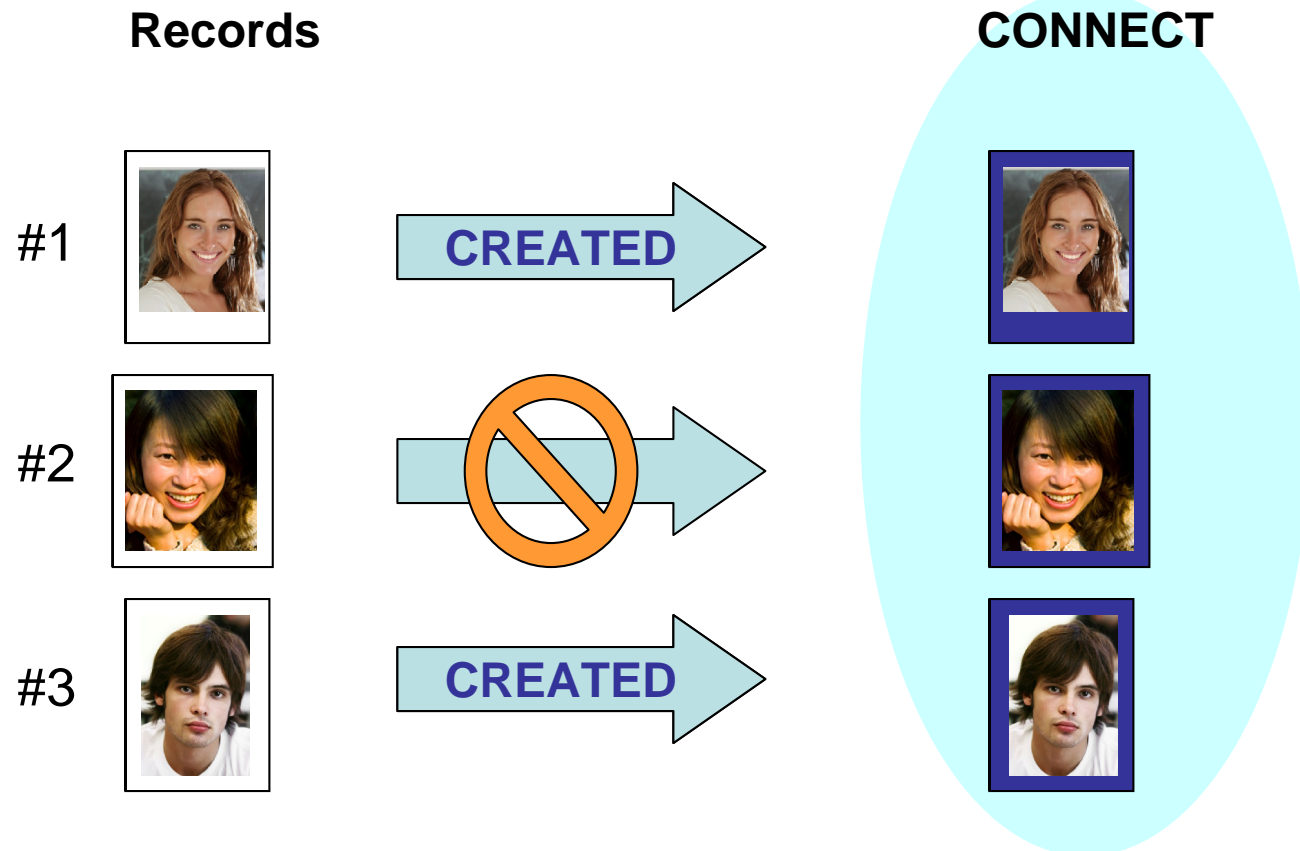
Import : All vs New vs Updates



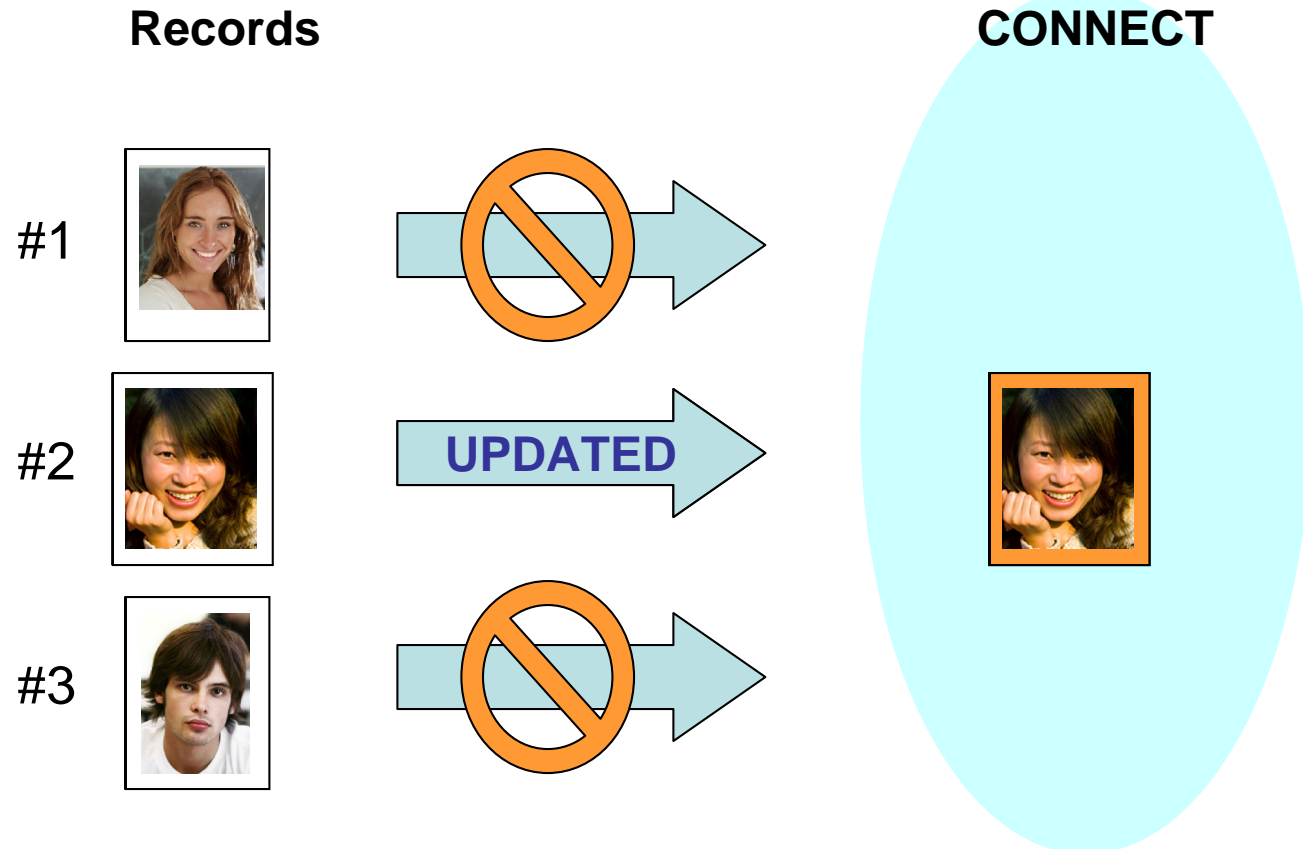
Import : ALL Records



Import : NEW Records



Import : UPDATE Records



LEARN HOW TO IMPORT IN CONNECT

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- Find and re-import Rejected Records

See You In a Future EMT Webinar Class

- CONNECT Overview
- Creating Effective Filters for Beginners
- E-mails that CONNECT

To register go to:

www.connectuniversity.com/training/

Thank you for attending

Please be sure to fill out the evaluation which will be available as you exit class.

Also, if you have questions or comments for me, feel free to mmorman@hobsons-us.com or call me at (513)985-6005.

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