



ROSTER IMPORT TEMPLATE

FILE STRUCTURE

Column Header	Description	Sample Value	Required
FirstName	Student First Name	John	Yes
LastName	Student Last Name	Doe	Yes
SchoolRecordNumber	School's Impexium Record Number	21370004	Yes
SchoolName	School Name	Test High School	Yes
StudentRelationship	Student's Relationship to the School	Student	Yes
SchoolRelationship	School's Relationship to Student	School	Yes
isRelationshipPrimary	Is this the student's primary relationship	Yes	Yes
EmailAddress	Student's email address	john.doe@highschool.org	No
isEmailPrimary	Is email address primary	Yes	No
AddressLine1	Address Line 1	100 Main Street	Yes
AddressLine2	Address Line 2	Building A	No
AddressCity	Address City	McLean	Yes
AddressState	Address State	Virginia	Yes
AddressZip	Address Zip Code	22102	Yes
AddressCountry	Country Name	United States	Yes
Ethnicity	Student Ethnicity	Caucasian	No
Gender	Student Gender	Male	Yes
Grade	Student Grade	9	Yes
OfficerPosition	Student Position	President	No

COLUMN NOTES

1. **FirstName:** This column is **required** and should be the student's first name.
2. **LastName:** This column is **required** and should be the student's last name.
3. **SchoolRecordNumber:** This column is **required** and must match the existing Impexium record number for your school.
4. **SchoolName:** This column is **required** and must **match** the existing name for your school.
5. **StudentRelationship:** This column is **required** and must **always** have a value of Student.
6. **SchoolRelationship:** This column is **required** and must **always** have a value of School.
7. **isRelationshipPrimary:** This column is **required** must **always** have a value of Yes.
8. **EmailAddress:** This column should be the student's email address. If an email address is provided, it must not already exist in the system, otherwise the import will give an error message.
9. **isEmailPrimary:** If an email is given for a student, it is recommended to be identified as being primary.
10. **Address Columns:** Addresses are **required**, and it's fine to use the school address for students. Since address information is crucial to membership pricing, failure to provide it will prevent a membership from being purchased



for the student. NOTE: The State is required for all chapters located in the United States or Canada; it is not required for other countries.

11. **Ethnicity:** Available values are listed below:
 - a. African American
 - b. Asian
 - c. Caucasian
 - d. Hispanic
 - e. Native American
 - f. Other

12. **Gender:** This column is **required**. The available values are listed below:
 - a. Female
 - b. Male
 - c. n/a

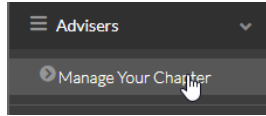
13. **Grade:** This column is **required**. The available values are listed below:
 - a. Freshman
 - b. Sophomore
 - c. Junior
 - d. Senior
 - e. 5
 - f. 6
 - g. 7
 - h. 8
 - i. 9
 - j. 10
 - k. 11
 - l. 12
 - m. Other
 - n. N/A

14. **OfficerPosition:** Available values are listed below:
 - a. Historian
 - b. Parliamentarian
 - c. President
 - d. Reporter
 - e. Secretary
 - f. Treasurer
 - g. Vice President

ROSTER IMPORT PROCESS

ACCESSING THE UPLOAD STUDENTS PAGE

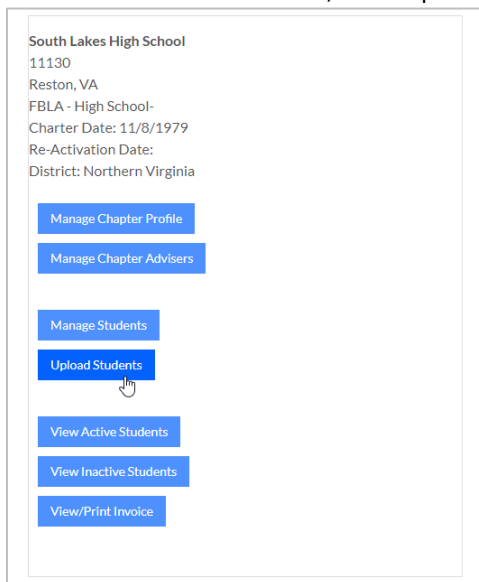
1. Navigate to the Adviser Portal



2. Click Your Chapter



3. Under the School Information, click "Upload Students" to access the page.



UPLOAD STUDENTS PAGE

The Upload Students page contains two sections – the Roster Import and Roster Import History

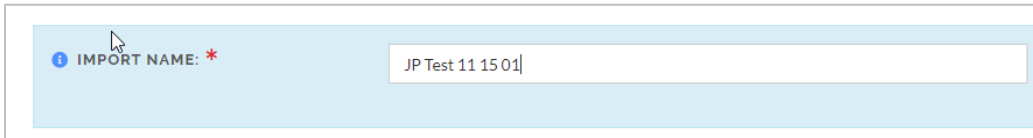
Roster Import allows you to upload an Excel file initiating a job to import student data into Impexium. If you have a job pending this section will not appear.

Roster Import History lists all the jobs you have submitted to Impexium.

ROSTER IMPORT

TO UPLOAD A FILE


1. Create an Excel file using the template provided per the file structure defined above.
2. Enter a name in the Important Name field.



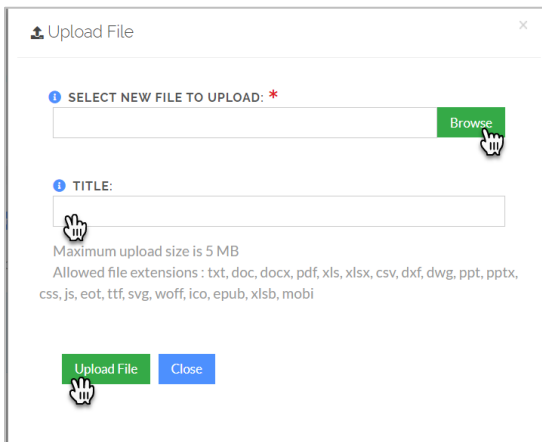
IMPORT NAME: *

3. Click the Upload File button.


Please upload a XLSX or CSV file using the upload button and then click on Continue

File	Sheets	Template	Upload
	Student Upload Roster	2019-2020StudentRosterTemplate.xlsx	

4. Click the Browse button to find the file you wish to upload. Then enter a Title for the file and click Upload File button.





Upload File

SELECT NEW FILE TO UPLOAD: * 

TITLE:

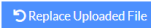
Maximum upload size is 5 MB
Allowed file extensions : txt, doc, docx, pdf, xls, xlsx, csv, dxf, dwg, ppt, pptx, css, js, eot, ttf, svg, woff, ico, epub, xlsx, mobi


 

5. The file you selected will display, then click the Continue button.

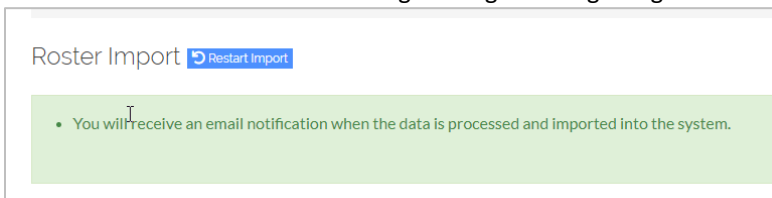
Upload File

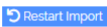
Please upload a XLSX or CSV file using the upload button and then click on Continue

File	Sheets	Template	Upload
Feb14StudentRosterImport6.xlsx	Student Upload Roster	2019-2020StudentRosterTemplate.xlsx	



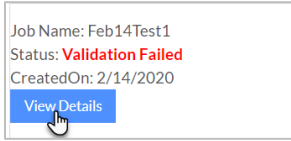
6. You should then receive the following message about getting an email notification when the data is imported.



Roster Import 

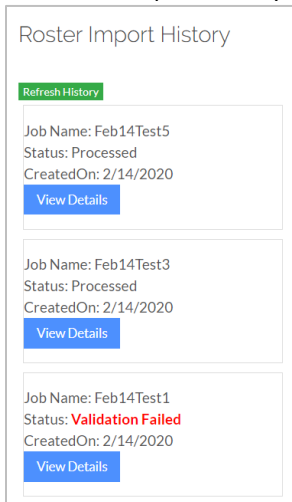
- You will receive an email notification when the data is processed and imported into the system.

- After receiving the email notification and/or seeing the job Status change to Processed in the Roster Import History area, your students have been uploaded. If validation errors occur, they indicate the file could not be processed due to an issue with the information in the file. You can view the details of errors by clicking the View Details button on the job in the Roster Import History area.



ROSTER IMPORT HISTORY

The Roster Import History lists all Roster Import jobs previously submitted by a user.



The following table lists the statuses for Roster Imports.

Status	Description
Needs Importing	The file has been uploaded and waiting to be validated
Needs Normalization	The file has been uploaded, validated and is in the queue to be normalized
Needs Conversion	The file has been uploaded, validated and in the queue to be converted into Impexium.
Validation Failed	The file has been uploaded and failed validation
Processed	The file has been uploaded, validated and converted. The students included in the file should not be visible via the Manage Students roster view.

NOTE: If any job has a Status of Needs Importing or Needs Conversion, the Roster Import is disabled until the currently running job is complete. Only one job can be processing per user at any given time.



The View Details button allows access to additional information about the specific Import job.

Job Name: Feb14Test1
Status: **Validation Failed**
Created On: 2/14/2020
[View Details](#)

If the file failed validation, the specific validation errors can be viewed by clicking on “Validation Failed” within the View Details Overview.

View Details

Overview

Feb14Test1

Status: **Validation Failed**

Import Date:

Import Started:

Import Finished:

Import Summary

FILES	1
WORKSHEETS	1
TOTAL VALID INDIVIDUAL RECORDS	4 of 4
TOTAL VALID ORGANIZATION RECORDS	4 of 4

The Validation Errors lists includes the error message and the row/line number in the Excel file that generated the error.
NOTE: The validation process checks the following items on each row in the import file based on the file structure noted on pages 1-3.

Overview | **Details** | Records

Files / Worksheets

Validation Errors

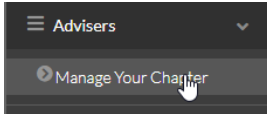
1 [1 to 10 out of 10 records]

Error Message	Line
AddressState Is Blank or Invalid. This column is required for all rows.	3
StudentRelationship Is Blank Or Not Valid. Student Relationship value must be Student. This column is required for all rows.	2
AddressCountry Is Blank or Invalid. This column is required for all rows.	5
AddressZip Is Blank. This column is required for all rows.	4

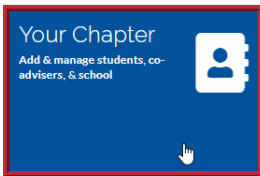
DON'T FORGET TO PURCHASE MEMBERSHIPS!!

After your students are successfully uploaded, don't forget to purchase memberships for them!! Do that by navigating back to Your Chapter and clicking the Manage Students button.

1. Navigate to the Adviser Portal



2. Click Your Chapter



3. Under the School Information, click the Manage Students button to see a list of your students and to buy memberships for them.

