Blackbaud Education Management System
Initial Data Conversion Guide for K-12

The Initial Data Conversion (IDC) creates constituent records and populates biographical information in your school's database. These records allow users to login, be enrolled in classes, sign contracts, fill out forms, and more, depending on what pieces of the software you're implementing. Completing the IDC is an essential step in setting up the software. It sets the foundation for implementing Blackbaud's Enrollment Management System (EMS), Learning Management System (LMS), and Student Information System (SIS).

Purpose and Process

The Initial Data Conversion (IDC) creates constituent records and populates biographical information in your school's database to effectively use the Enrollment Management System (EMS), Learning Management System (LMS), and Student Information System (SIS).

- The IDC is completed by importing Excel files (saved as CSV files) into the database.
- These files can contain as much or as little constituent data as your school needs to track. However, the more data you add to this file, the more data your user will have on their record in your new database.
- Your school must identify a Data Specialist (typically your Database Administrator, Technology Director or Registrar) that will be responsible for extract data from your legacy system(s), scrubbing the data and submit all required data files to your Blackbaud Consultant via the Blackbaud Managed File Transfer tool.
- For security data files should never be sent via email to your Blackbaud Consultant.

You will work with your Blackbaud Consultant to import your initial constituent files into the database. Depending on the package you purchased, your Blackbaud Consultant will always assist you with imports for the following constituents:

- **Employees** - current teachers, staff, and coaches
- **Parents** - current parents, stepparents, and guardians
- **Students** - current students

If you purchased a data upgrade package, your Blackbaud Consultant will also assist you to import these constituents:

- Alumni
- Parents of Alumni
- Friends
- Past Students
- Grandparents
- Employee directory updates

All files do not need to be delivered simultaneously. However, some depend upon others to be processed first. For example, we cannot process the Student Role file until after the General User file is processed. After the initial data conversion is complete, a Data Manager can import additional files to add new records or update existing records via *Core > System Tools > Data Import*.

> **IMPORTANT:** A data import cannot be used to remove records in bulk. It may be billable if you need Blackbaud to remove inaccurate data in bulk. Validate your data before submitting to ensure any issues are resolved prior to the data being imported.

File Layout Templates

The Initial Data Conversion templates are available here. Make sure to click on the second tab of the file to see the template example.

Before you begin preparing your IDC files you should take the following Blackbaud University Trainings. These trainings will assist you in the decision-making process while creating your IDC files by acquainting you with what the files will create.

- K-12 Core: Roles and Tasks | eLearning
- K-12 Core: User Management | eLearning
- K-12 Core: Login Setup with Blackbaud ID | eLearning
- K-12 Core: Contact Card and Directory Setup

Data Scrubbing

You will want to ensure your data is formatted correctly before importing. If you bring junk into your database, you will end up with junk data as you continue your implementation. Scrubbing data ensures that you start with accurate and concise data in your new database. For example, double-check that all your phone numbers have the same format, the address is in the correct case, etc. It may take a little extra time in the short-term, but it will pay off in the long-term! *Blackbaud is not responsible for formatting or scrubbing*.

- Remove duplicate records from the file so that duplicates are not created in the system.
- Remove redundant ethnicities if necessary - i.e., Caucasian & White, or Black & African American. Filters in Excel can help you identify redundant entries.
- Remove redundant religions if necessary - i.e., Christian (Non-Denominational) & Non-Denominational Christian. Filters in Excel can you identify redundant entries.
- Check to make sure phone numbers are in the format you want them to be in the system - i.e. (555) 555-5555 or 555-555-5555 vs 5555555555. Controlling the way this data is returned in Excel can help standardize phone number values.
- Ensure that the column headers match the column headers outlined in the file layout guide. If column headers do not match the layouts supplied in the file layout guide the data will not be imported. Do not supply additional columns like Role in the General User import.
- Ensure all users have a Host ID. Filters in Excel can allow you to identify entries without a Host ID.
- Ensure all users have a *unique* Host ID. Filtering for duplicate values in the Host ID column can allow you to identify entries without a unique Host ID.
- Check to make sure dates are in MM/DD/YYYY format for birthday, hire date, or enrollment date. Excel has a tool to format dates which may help you dates.

- Check to make sure Grad Year is in YYYY format. Filters in Excel can help you quickly identify if any grad years are not in the correct 4-digit format.
- Ensure that the salutations are for the address record and not the individual people within the household.
- Ensure that the school levels and grade levels match what is in the system under *Core > Settings > School information > School & grade levels*. Filters in Excel can allow you to identify entries that do not match what is in Core.
- Look for data shifts in your file(s) for both the fields and records. Examples may include:
  - o Data swapped in two fields.
  - o Data shifted left or right one or more positions to the wrong fields; this may be in all records or in individual records.
  - o Data shifted up or down in records (e.g., host ids associated with the wrong users)

Types of Imports
- **General User** - the general user import adds constituents and their biographical information to the database. All users are given the role of "All School" in this step.
- **Relationships** - the relationship import links constituents together- such as spouses, parents and children, or grandparents and grandchildren.
- **Roles** - the role assignment import assigns constituents to roles like Student, Teacher, Alumni, etc. Parent, Guardian, and Grandparent roles are assigned through relationships to a student or alumni.

General User File
The purpose of the General User import is to create constituents in the database and populate their biographical information. User records must be created before roles can be assigned. The General User import can also be used to update constituent information for existing users.

To effectively use Blackbaud Education Management the following constituents should be added to the database:

- **Employees** includes only current teachers, staff, and coaches.*
- **Parents** includes only current parents, stepparents, and guardians.
- **Students** includes only current students.

*If you need to import past employees you can import them as current employees and subsequently use the Withdraw Employees task to move them into the past role in bulk.

The Host ID is a unique ID that exists in your current database (Unique Key, Import ID or Record ID, User ID, etc.) This will be used to match records between your old and new database as you complete your imports. *The Host ID is required for your initial General User import and is limited to 25 characters.* Once users have been created, you will have the option to match using the Host ID or User ID for all supplemental imports. Each record in the database will automatically receive a unique Blackbaud User ID.

Table Values

Some fields on the General User template require you to populate tables within Core for the data to be imported. The data values on your spreadsheet *must match* the table value within Core.

- **Gender** - Core > Users > User profile settings > Gender
- **Pronouns** - Core > Users > User profile settings > Pronouns
- **Ethnicity** - Core > Users >User profile settings > Ethnicity types
- **Race** - Core > Users >User profile settings > Race types
- **Religion Types** - Core > Users > User Profile Settings > Religion types
- **Citizenship** - Core > Settings > General settings > Table values > Citizenship
- **School Program** - Core > Settings > General settings > Table values > School Program

Blackbaud ID Username

All users that will log into your database should have their email address in the BBID Username column. *The email address used for Blackbaud ID must be unique. It can't be used by other users.* For more information on Blackbaud ID for Education Management, click here.

Sample General User File

This file will contain each user in a separate row (Students, Parents & Employees). *The more data you add to this file, the more data your user will have on their record in the database*.

host_id	prefix	firstname	middle name	prefer red_na	maide nname	lastname	suffix	email	cc_email	greeting	bbid_username	disable_login	dob	gender	pronoun	ssn	student_id
ADU001		George				Jetson		george@jestonfamily.com			george@jestonfamily.com			M			
ADU002		Jane				Jetson		jane@jetsonfamily.com			jane@jetsonfamily.com			F			
ADU003		Homer				Simpson		homer@simpsonfamily.com			homer@simpsonfamily.com			M			
ADU004		Marge				Simpson		marge@simpsonfamily.com			marge@simpsonfamily.com		mm/dd/yyy	F			123451
STU001		Judy				Jetson		judy@schooldomain.com			judy@schooldomain.com		mm/dd/yyy	F			123452
STU002		Elroy				Jetson		elroy@schooldomain.com			elroy@schooldomain.com		mm/dd/yyy	M			123453
STU004		Bart				Simpson		bart@schooldomain.com			bart@schooldomain.com		mm/dd/yyy	M			123454
STU005		Lisa				Simpson		lisa@schooldomain.com			lisa@schooldomain.com		mm/dd/yyy	F			123455
STU006		Maggie				Simspon		maggie@schooldomain.com			maggie@schooldomain.com		mm/dd/yyy	F			123456

Relationships File

The purpose of the Relationship Building import is to form relationships between constituents once they have been added to the database. Related users may be able to view or perform certain actions for their family members, for example parents may be able to update their child's contact information in the contact card or view report cards online.

There are two types of relationship imports: **[Hierarchical](#)** and **[Peer](#)**. Each of these imports have unique file requirements which are defined below. Users are matched on Host ID, First Name, and Last Name.
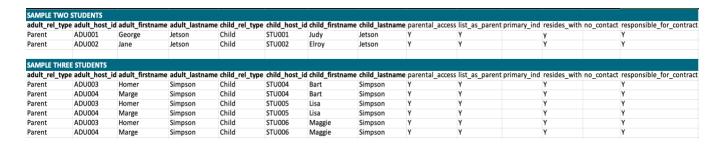
Relationship Types
- A platform manager must review relationship types in **Core** before importing relationships.
  - *Core > Users > User profile settings > Relationship types*
- There are a few important things to know about relationship types:
  - Activate **either** the Spouse/Partner or Spouse relationship, **do not activate both**. If both relationship types are activated a duplicate relationship will be created when records are imported.
  - Relationship types cannot be created or renamed.
  - For each of the hierarchical relationships you plan to use in your database, establish appropriate default settings for Parental Access, List As Parent, and Responsible for Signing Contract.

Address Sharing & Salutations
- The home address and home phone number will be shared during the relationship import process if certain criteria are met.
  - **Hierarchical Relationships** (Parent/Student): the home address and home phone number will be shared during a hierarchical relationship import if **the home address and home phone are identical** and if **"resides_with"** is set to **"Y"** or "**Yes"** for the users.
  - **Peer Relationships** (Spouse/Partner): the home address and home phone number will be shared if the **home address** and **home phone are identical for the users.**
- You can assign 3 salutations to each address. Address salutations are most used when printing mail labels. The salutations are **_tied to the address and not the individual_**, so the salutations are typically generic and geared towards the parents or the household instead of students.
  - Informal (example: John and Mary)
  - Formal (example: Mr. and Mrs. Smith)
  - Household (example: The Smith Household)

Sample Hierarchical Relationships File
This file links the parents to their child and will give the parent role. Each student must be on a separate row with each parent listed. A child with two parents will be listed twice with each parent.

adult_rel_type	adult_host_id	adult_firstname	adult_lastname	child_rel_type	child_host_id	child_firstname	child_lastname	parental_access	list_as_parent	primary_ind	resides_with	no_contact	responsible_for_contract
SAMPLE TWO STUDENTS													
Parent	ADU001	George	Jetson	Child	STU001	Judy	Jetson	Y	Y		Y		Y
Parent	ADU002	Jane	Jetson	Child	STU002	Elroy	Jetson	Y	Y		Y		Y
SAMPLE THREE STUDENTS													
Parent	ADU003	Homer	Simpson	Child	STU004	Bart	Simpson	Y	Y		Y		Y
Parent	ADU004	Marge	Simpson	Child	STU004	Bart	Simpson	Y	Y		Y		Y
Parent	ADU003	Homer	Simpson	Child	STU005	Lisa	Simpson	Y	Y		Y		Y
Parent	ADU004	Marge	Simpson	Child	STU005	Lisa	Simpson	Y	Y		Y		Y
Parent	ADU003	Homer	Simpson	Child	STU006	Maggie	Simpson	Y	Y		Y		Y
Parent	ADU004	Marge	Simpson	Child	STU006	Maggie	Simpson	Y	Y		Y		Y

Sample Peer Relationships File

This file links the parents to each other as spouses as well as students to each other as siblings.

- The parents will be listed in one row per couple with each spouse.
- The siblings will have one or multiple rows depending on the number of siblings.

peer1_rel_type	peer1_host_id	peer1_firstname	peer1_lastname	peer2_rel_type	peer2_host_id	peer2_firstname	peer2_lastname
SAMPLE SPOUSES							
Spouse	ADU001	George	Jetson	Spouse	ADU002	Jane	Jetson
Spouse	ADU003	Homer	Simpson	Spouse	ADU004	Marge	Simpson
SAMPLE TWO SIBLINGS							
Sibling	STU001	Judy	Jetson	Sibling	STU002	Elroy	Jetson
SAMPLE THREE SIBLINGS							
Sibling	STU004	Bart	Simpson	Sibling	STU005	Lisa	Simpson
Sibling	STU004	Bart	Simpson	Sibling	STU006	Maggie	Simpson
Sibling	STU005	Lisa	Simpson	Sibling	STU006	Maggie	Simpson

Roles File

The purpose of the User Role import is to assign constituents the appropriate roles once they have been added to the database. Constituent roles (Teacher, Non-Teaching Staff, Student, Alumni, etc.) can be assigned with this import.

- There are four layouts available: Employee, Student, Alumni, and all other roles. Each of these imports have unique file requirements. Users are matched on Host ID First Name, and Last Name.
- For the Employee Role file any employee who teaches should have the Teacher role so that they can be assigned to classes and all others should be assigned the Non-Teaching Staff role. Additional roles can be assigned to users once they are imported.
- Parent, Grandparent, Parent of Alumni, and Parent of Past Student roles are assigned through an established relationship with a Student, Alumni, or Past Student.

Sample Student Role Assignment

This file will contain each student in a separate row with their grade for the Current School Year. The level description and grade level description must match your set up in *Core > Settings > School information > Schools & grade levels.*

host_id	firstname	lastname	level_description	school_year_label	grade_level_desc	enroll_date
STU001	Judy	Jetson	Upper School	2022 - 2023	9	8/1/18
STU002	Elroy	Jetson	Elementary School	2022 - 2023	PK	8/1/18
STU004	Bart	Simpson	Elementary School	2022 - 2023	4	8/5/18
STU005	Lisa	Simpson	Elementary School	2022 - 2023	2	8/5/18
STU006	Maggie	Simspon	Elementary School	2022 - 2023	PK	8/5/18

Sample Employee Role Assignment

This file will contain each employee in a separate row. The appointed date is required.

host_id	firstname	lastname	role_description	appointed_date
EMP101	Edna	Krabappel	Teacher	10/2/12
EMP204	Seymour	Skinner	Non-Teaching Staff	4/11/17
EMP204	George	Feeny	Teacher	4/11/17
EMP380	Jessica	Day	Teacher	4/11/17

Description of File Template Column Headers

General User File Fields

Column name	Required	Data type	Max length	Description	Ability to Remove Data
host_id	true	varchar	25	User's unique HostID as assigned by the school. Host ID must be supplied during the initial import.	No
firstname	true	varchar	50	First name	No
lastname	true	varchar	50	Last name	No
new_firstname	true	varchar	50	Update profile firstname	No
new_lastname	true	varchar	50	Update profile lastname	No
prefix	false	varchar	25	Prefix	Yes
middlename	false	varchar	50	Middle name	Yes
preferred_name	false	varchar	50	Prefered name	Yes
suffix	false	varchar	25	Suffix	Yes
maidenname	false	varchar	50	Maiden name	Yes
email	false	varchar	100	Email	Yes
cc_email	false	varchar	100	CC Email	Yes
bbid_username	false	varchar	500	The user_name for existing users will NOT be overwritten. Must be valid email format for BBID authentication required.	No

disable_login	false	char		Disable user login? (Yes=disable login, No=enable login or leave blank to do nothing)	No
dob	false	datetime	10	Date of birth (MM/DD/YYYY)	No
ssn	false	varchar	11	Social Security Number	Yes
address_1	false	varchar	50	Home address line 1	Yes
address_2	false	varchar	50	Home address line 2	Yes
address_3	false	varchar	50	Home address line 3	Yes
city	false	varchar	50	Home city	Yes
state	false	varchar	50	Home state (use only when country is United States)	Yes
province	false	varchar	50	Home province name (Canada, Australia, New Zealand, United Kingdom)	Yes
zip	false	varchar	11	Home zip	Yes
country	false	varchar	50	Home country (no abbreviations)	No
region	false	varchar	25	Home region	Yes
formal_salutation	false	varchar	100	Formal mailing label salutation	Yes
informal_salutation	false	varchar	100	Informal mailing label salutation	Yes
household_salutation	false	varchar	100	Household mailing label salutation	Yes
phone	false	varchar	30	Home phone	No
greeting	false	varchar	50	Greeting (used for Pushpage email)	Yes
mailing_address	false	char	1	Mailing address (Y)es, (N)o or leave blank	No
preferred_address	false	char		Preferred address (Y)es, (N)o or leave blank	No
wireless_phone	false	varchar	30	Wireless phone	No
living_status	false	varchar	10	Living Status (Single, Married, Remarried, Separated, Divorced, Widowed, Partner)	Yes
Ethnicity	false	varchar	50	Ethnicity. **Exact match to table value in Core.**	Yes
race	false	varchar	100	Race. **Exact match to table value in Core.**.	Yes
religion	false	varchar	50	Religion. **Exact match to table value in Core.**	Yes
citizenship	false	varchar	50	Citizenship: **Exact match to table value in Core.**	Yes
gender	false	char	1	Gender (M)ale, (F)emale, etc. **Exact match to table value in Core.**	Yes
pronoun	false	vachar	100	System supported gender pronouns. **Exact match to table value in Core.**	Yes
deceased_ind	false	char		Deceased (Y)es, (N)o or leave blank	No
deceased_date	false	datetime	10	Deceased Date (MM/DD/YYYY)	No
business_name	false	varchar	75	Business name	No
job_title	false	Varchar	255	Job title	Yes
profession	false	varchar	100	Profession/Occupation	Yes

industry	false	varchar	100	Industry	Yes
employment_start	false	datetime	10	Employment start date (MM/DD/YYYY)	No
employment_end	false	datetime	10	Employment end date (MM/DD/YYYY)	No
business_url	false	varchar	100	Business URL	Yes
organization	false	varchar	50	Organization	Yes
student_id	false	varchar	25	Student ID	Yes
lost_ind	false	char		Lost (Y)es, (N)o or leave blank. Lost indicates the school does not have their current contact information	No
boarding_day	false	varchar	10	(B)oarding or (D)ay or leave blank	Yes
religious_affiliation	false	varchar	50	Religious affiliation	Yes
international	false	char		International. (Y)es, (N)o or leave blank	Yes
school_program	false	varchar	50	School Program - **Exact match to table value in Core.**	Yes

Role Assignment - Employees

Column name	Required	Data type	Max length	Description	Ability to Remove Data
host_id	true	varchar	25	User's unique HostID as assigned by the school	No
firstname	true	varchar	50	First name	No
lastname	true	varchar	50	Last name	No
role_description	true	varchar	100	Descriptive name of the Role. Teacher or Non-Teaching Staff. **Exact match to what is in Core.**	No
appointed_date	true	datetime		Appointed date	No

Role Assignment - Students

Column name	Required	Data type	Max length	Description	Ability to Remove Data
host_id	true	varchar	25	User's unique HostID as assigned by the school	No
firstname	true	varchar	50	First name	No
lastname	true	varchar	50	Last name	No
level_description	true	varchar	50	Campus school level	No
school_year_label	true	varchar	11	School Year Label (YYYY - YYYY)- exact match	No
grade_level_desc	true	varchar	100	Constituent's grade level for school year label supplied (above)	No
enroll_date	true	datetime		Student enrollment date. **This field may appears on transcripts.**	No

Peer Relationships Fields – (Spouse/Partner & Siblings)

Column name	Required	Data type	Max length	Description	Ability to Remove Data
peer1_rel_type	true	varchar	50	Peer1 type of relationship (non-parental)	No
peer1_host_id	true	varchar	25	Peer1 unique HostID as assigned by the school.	No
peer1_firstname	true	varchar	50	Peer1 Firstname	No
peer1_lastname	true	varchar	50	Peer1 Last name	No
peer2_rel_type	true	varchar	50	Peer2 type of relationship (non-parental)	No
peer2_host_id	true	varchar	25	Peer2 unique HostID as assigned by the school.	No
peer2_firstname	true	varchar	50	Peer2 First name	No
peer2_lastname	true	varchar	50	Peer2 Last name	No

Hierarchical Relationships Fields – (Parent/Student)

Column name	Required	Data type	Max length	Description	Ability to Remove Data
adult_rel_type	true	varchar	50	Adult type of relationship	No
adult_host_id	true	varchar	25	Adult unique HostID as assigned by the school.	No
adult_firstname	true	varchar	50	Adult First name	No
adult_lastname	true	varchar	50	Adult Last name	No
child_rel_type	true	varchar	50	Child type of relationship	No
child_host_id	true	varchar	25	Child unique HostID as assigned by the school.	No
child_firstname	true	varchar	50	Child First name	No
child_lastname	true	varchar	50	Child Last name	No
resides_with	true	char		Resides with (Y)es, (N)o	No
parental_access	false	char		Parent access (Y)es, (N)o or leave blank for default setting	No
list_as_parent	false	char		List as parent (Y)es, (N)o or leave blank for default setting	No
responsible_for_contract	false	char		Responsible for signing contract (Y)es, (N)o or leave blank for default setting	No
primary_ind	false	char		Primary (Y)es, (N)o or leave blank	No
no_contact	false	char		No contact (Y)es, (N)o or leave blank	No

> **Note**: the home address and home phone number will be shared during a hierarchical relationship import if the **home address and home phone are identical** and if **"resides_with"** is set to **"Y"** or **"Yes"** for the users.

Connect Raiser's Edge Considerations*

Connect Raiser's Edge enables you to update and add information to your Raiser's Edge database based on information entered in Education Management. For example, when a parent updates his address or a student graduates, that information can be easily shared with your fundraising team. The integration is designed as a one-way sync from Education Management into Raiser's Edge. Your Education Management database should be your record of truth with the most current information, or else you may lose data in Raiser's Edge. *Carefully review the considerations below as you prepare your IDC files if you are implementing Connect RE.

Country
- Ensure all addresses on your IDC files have the Country populated. If the Country field is blank, the State field will also be removed in Raiser's Edge.

Gender
- If your RE database has Gender-specific relationships (Mother, Father, Son, Daughter), you must populate the gender of students and parents on your IDC files.
- Without both the parents and students having their gender populated in Core, you will get a new relationship in Raiser's Edge one for Parent/Child.

Spouses
- It's essential to populate the Relationships Peer File for your IDC with spousal information if you plan to use Connect RE.
- If a spouse relationship is missing on the **Core** record for any record type (parent, faculty/staff, grandparents, etc.) but exists in **Raiser's Edge**, the integration will divorce them since the spouse is not listed at the time of the sync.
- You will also want to populate Living Status on your IDC files as if this field is not imported to Core, then Marital Status in Raiser's Edge will get deleted.

Suffix
- We suggest that **Suffix** is populated in both **Raiser's Edge** & **Core** (Jr., Sr., III, etc.). If a father/son has the same name, it is easy to match the wrong records, which can result in the mother being married to their son.

Race vs. Ethnicity
- Connect Raiser's Edge maps the **ethnicity field** that is in **Core** to the **race field** that is in **Raiser's Edge**. The race field in Core does sync over to Raisers Edge via Connect Raiser's Edge.

Please review our Data Integration Guide for Connect Raiser's Edge to see which types of data the integration handles and how it handles them. The guide outlines what happens to data in Raiser's Edge if it does not exist in Core.

File Delivery

1. When your files are ready, you can securely send them to me for validation and processing via Thru Blackbaud's approved Managed File Transfer (MFT) provider.
2. Go to: https://mft-us.blackbaud.com/
3. You do not need to log in. Click "Upload Files".
4. A window will pop-up (ensure your browser allows for pop-up windows for this site). Fill-in the following fields:
    a. **TO:** (Enter your consultants email address)
    b. **FROM:** (Enter your email address)
    c. **SUBJECT:** (Enter your School's Name, not abbreviated, plus 4-5 words to describe purpose of files. (Ex: Blackbaud University - IDC: Parents & Students)
    d. **MESSAGE:** Enter a brief message to relay more details about your file delivery.
5. Click the link "Select Files" to upload the file(s) to be delivered. Enter the Captcha code in the bottom left & Tick the checkbox in the bottom right. Click the "Upload" button to complete the process.

If there are no issues with your files, your Blackbaud Consultant will process them, but if there are, they will send them back to you for corrections or adjustments.

Potential Duplicate Users

Once your Blackbaud Consultant has confirmed that your Initial data Conversion (IDC) has been completed please take a moment to review the Potential duplicate users *(Core > Users > Potential duplicate user*s) and merge any users that are the same.

Individuals with matching names, email addresses, or wireless phone numbers are automatically considered potential duplicate users. For each set of possible duplicates, the name of the newer user and the date the user was created appear in a column on the left. For more information on potential duplicate users click here.

Post Initial Data Conversion (IDC) Updates

- Once your Initial Data Conversion (IDC) has been complete by your Blackbaud Consultant a user with the Data Manager role can submit additional data import files when data needs to be refreshed or added.
- Instructions on how to perform Data Imports can be found here.
- Our Customer Support Team can also assist you with any questions you may have.
- Ready to learn more? Take our ***Data Imports | eLearning / K-12 Core*** on K-12 Core learning path in Blackbaud University Training.

How To Perform a Data Import:

In essence, you will re-create the same files for General User or Role Assignment or Relationships that you did for the IDC process. Then, save the file(s) in CSV format.

1. Log into the app and navigate to: Core > System tools > Data import.
2. Click on the blue "Create import job" button. You will be presented with two drop-down list boxes for Category and Import Type.
3. Select Category: Contact Card Insert/Refresh.
4. Select Import Type and choose one of available options (such as: General User, Role Assignment, Relationship Building, Address & Salutations, Phone Number, etc.)
5. In the Name box, create a job name of your choice.
6. Under the section "File layout help", you can click on the "View file layout help" button for either details about each field available on that Import Type (Detailed View) or download a Sample file to use as a template.
7. Then, under the "Upload files" section, identify the file you want to use.
8. Lastly, click on either button "Validate Only" or "Process Now".

Best Practice Recommendations:

1. Validate your files first. This will assist in identifying if any of the data within the file may be problematic during processing. It will give you a chance to revise the file prior to committing processing.
2. Initially, create your Data Import files with a minimal number of records (such as 10) and go through the entire process (Validate and then Process) before performing an import with hundreds of records. Some of the Data Import types are Insert only. Meaning, you cannot re-do the import to bulk update existing records if after importing is completed and you discover online that something is missing. In that situation, you would have to edit each imported record to add missing information.
3. Always review the result of the import (the first job with minimal records) online to ensure that the import brought the data into Core as you expected. If it didn't (such as, maybe the preferred name data was in the file's field labeled lastname), it is easy to fix the file with hundreds of records that had the same issue prior to processing it.
4. Use prior imports. Looking at the Data Import job list, if you find another job which completed successfully, you can click on the round ellipsis button (to the left of the job name) and then choose View Results. From the new screen, click on the "Processed file" link. This will enable you to download the processed file and review/compare it to your file.

FAQs

Host ID vs. User ID vs. Student ID – What is the difference?

- **Host ID** - The Host ID is a unique ID that exists in your current database (Unique Key, Import ID or Record ID, User ID, etc.) This will be used to match records between your old and new database as you complete your imports. The Host ID is required for your initial General User import.
- **User ID** - The User ID is the unique number assigned to every user in your Education Management (Core) Database. Whenever you create a new user in Core either manually or via a data import, the system always assigns them a unique User ID. Please note that User IDs may be visible to other users in Blackbaud Education Management, such as when they view user's Contact card, in URLs, or in HTML source code. They should not be used in place of passwords or other privately secured data.
- **Student ID** - Student ID assigned by the school.

Why is the Hierarchical Relationships import required?

The hierarchical relationship links the student and parent within the database. It is an essential import for your Education Management Database so that parents can view their child's progress, submit contracts, update their child's contact information and more depending on what pieces of the software you are implementing. Relationships do not inherently give users access to view this information, but they allow system administrators to give the access while setting up the software in the future.

Why is the Peer Relationships import important?

The peer relationship links the spouses and siblings within the database allowing you a holistic overview of the family from the parent and student contact card. For example, from a student's contact card you would be able to see any siblings enrolled at the school**. It's essential to populate the Relationships Peer File for your IDC with spousal information if you plan to use Connect RE.** If a spouse relationship is missing on the **Core** record for any record type (parent or faculty/staff) but exists in **Raiser's Edge**, the integration will divorce them since the spouse is not listed at the time of the sync.

What are the required files and order they should be submitted in?

1. General User
2. Employee Roles
3. Student Roles
4. Hierarchical Relationships
5. Peer Relationships

Can I import multiple Races, Religions, or Ethnicities for single user?

A user can only have one Religion or Ethnicity value on their record. You can import multiple Races for individuals, which enables you to track demographic information more accurately. Imported values must exactly match existing race types. You can prepare the Races data import from the User management category to import multiple races for individuals.

What relationship types can be assigned via the Hierarchical and Peer Relationships?

Platform managers setup relationship types to use to connect pairs of users. You must determine whether your school will use gendered relationships (husband/wife), non-gendered relationships (spouse/partner). This task can be completed via *Core > Users > User profile settings > Relationship types.*

What is the difference between Spouse and Spouse/Partner?

There is no difference between these two relationships aside from the name but whichever designation your school decides on should be the only one active.

When should I upload my data files to [Blackbaud MFT](#)?

Please work your Project Manager and Blackbaud Consultant to determine the appropriate time to import your data. Keep in mind your Initial Data Conversion must be complete before you are able to various components depending on what pieces of the software you are implementing. For example, your IDC must be complete to issue contracts, enroll students in classes or import historical grades.

There was an error on the files I submitted can the data be re-imported?

No, the scope of work for the data conversion covers one import. Any corrections to records must be completed by the school manually or by completing your own data imports.

Where do I edit table values for my Initial Data Conversion (IDC)?

- Core > Users > User profile
- Core > Settings > General settings > Table values
- In addition to the reports created for all schools, Tuition Management allows you to create your own [custom reports](#).