



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 | Yes |
| isEmailPrimary | Is email address primary | Yes | Yes |
| 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 | 10 (FBLA) | 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 is **required**, and it **must not** already exist in the database, otherwise the import will give an error message.
9. **isEmailPrimary:** This column is **required** must **always** have a value of Yes.
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. Not Selected

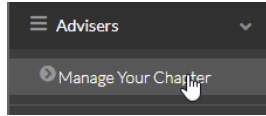
13. **Grade:** This column is **required**. The available values are listed below:
 - a. 5 (ML)
 - b. 6 (ML)
 - c. 7 (ML)
 - d. 8 (ML)
 - e. 9 (ML/FBLA)
 - f. 10 (FBLA)
 - g. 11 (FBLA)
 - h. 12 (FBLA)
 - i. Freshman (PBL)
 - j. Sophomore (PBL)
 - k. Junior (PBL)
 - l. Senior (PBL)
 - m. Graduate Student (PBL)
 - n. Not Applicable

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

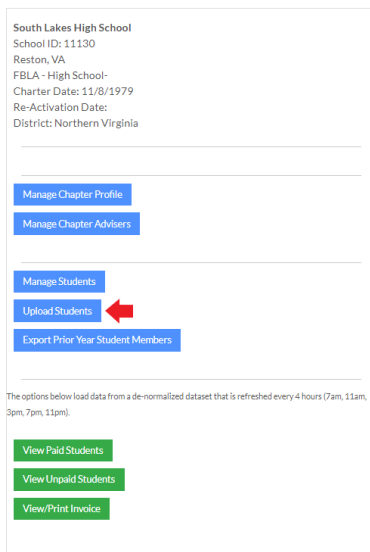
1. Navigate to the Adviser Portal



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

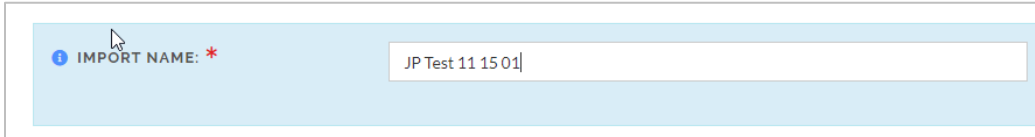
Roster Import allows you to upload an Excel file initiating a job to import student data into Impexium. If you have a job pending this section will not appear.

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.

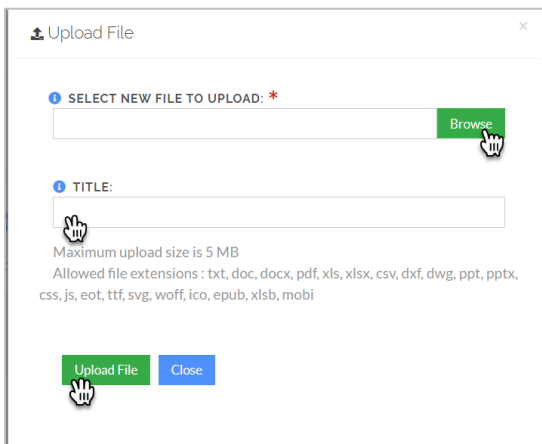


IMPORT NAME: *


3. Click the Upload File button.

| 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, xlsb, mobi

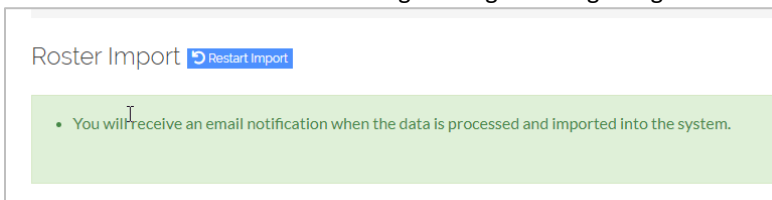
5. The file you selected will display, then click the Next button.

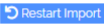
Upload File

| File | Sheets | Template | Upload |
|-------------------------------------|-----------------------|--------------------------------|---|
| Reston High School Test Roster.xlsx | Student Upload Roster | MasterRosterTemplateFinal.xlsx |  |



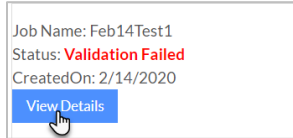
6. You should then receive the following message about getting an email notification when the data is imported.



Roster Import 

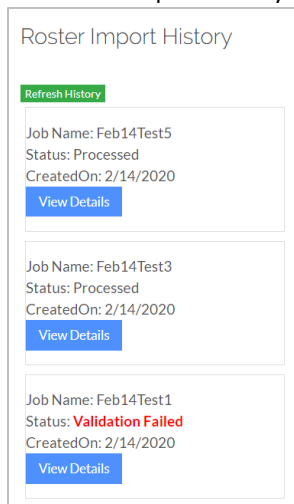
- You will receive an email notification when the data is processed and imported into the system.

- 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

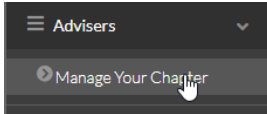
1 [1 to 10 out of 10 records]

| 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 |

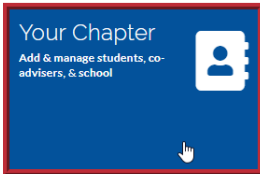
DON'T FORGET TO PURCHASE MEMBERSHIPS!!!

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.

