

# Import of Email Addresses and Telephone Numbers from a CSV File

ID: 23212

## Introduction

This utility enables the bulk insertion of telephone numbers or email addresses of current pupil/students, employees or their contacts, into a SIMS database.

Prior to running this utility, a .CSV file containing the required data must be created. The data must relate to people and relationships that are already defined in the database, e.g. students, staff and their associated contacts.



**IMPORTANT NOTE:** When using dbUpgrade to apply the patches described in this document, you can do so using Windows Authentication. If you use Windows Authentication, the user who applies the patches must have read/write access to the .CSV file and folder location.

If you use the SA login to apply the patches using dbUpgrade, full control needs to be granted for this user to the file and the folder.

## Creating and Importing a .CSV File

1. Create a folder called CSV\_Import on the C:\, D:\, S:\ or U:\ drive). This is where the .CSV file will be saved.
2. Create a .CSV file called EMAIL\_PHONE.CSV in the CSV\_Import folder. The .CSV file should contain the following columns in the specified order:

Column Name	Details
person_type	<p>This indicates the type of person whose email address or telephone number will be imported. Possible values are <b>S</b>, <b>E</b>, <b>SC</b> and <b>EC</b> for <b>student</b>, <b>employee</b>, <b>student contact</b> and <b>employee contact</b> respectively. Only <b>current</b> students, employees or their contacts are considered for import.</p> <p>If <b>email_phone</b> holds a <b>mask</b> from which email addresses are to be calculated, then only <b>S</b> or <b>E</b> is allowed here. Contact emails cannot be calculated from masks.</p>

Column Name	Details
surname	<p>Surname of the person whose email address or telephone number will be imported.</p> <p>Students in person_type S records may be identified with their UPN in the upn_ni_tt column, in which case the surname, forename and midname fields should be left blank.</p> <p>To generate email addresses for all current students (who are not individually identified by other person_type S type records in this file), put &lt;AS&gt; here and the required mask in the email_address column.</p> <p>To generate email addresses for all current employees (who are not individually identified by other E type records in this file), put &lt;AE&gt; here and the required mask in the email_address column.</p>
forename	Forename or first initial of the person whose email address will be imported.
midname	Midname of the person whose email address will be imported (or the first letter of it).
upn_adno_ni_tt	<ul style="list-style-type: none"> <li>▪ The <b>Unique Pupil Number (UPN)</b> or <b>Admission Number (ADNO*)</b> of the student (for person_type S); or</li> <li>▪ the UPN or ADNO of a student for whom the person of person_type SC is a contact; or</li> <li>▪ blank for a person_type E record; or</li> <li>▪ National Insurance number or Timetable Initials of the employee for whom this person of type EC is a contact; or</li> <li>▪ &lt;MASK&gt; if person_type is E or S and the email_phone column contains a mask for calculation of an email address for every current employee or student.</li> </ul> <p>* Admission numbers with prefix zero (and hence all-digit) could lose one or more leading zeros if saved from a spreadsheet. The import routine will automatically correct for this: when the person_type is <b>S</b> or <b>SC</b> and this column contains a one to five digit number it will be assumed to have been an Admission Number, and will be left padded with zeros to make it up to six characters.</p>

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email_phone	<p>The email address or telephone number to be imported.</p> <p>Email addresses are recognised by the presence of the '@' and '.' characters. If one or other of these characters is not present in this column, the value is assumed to be a telephone number.</p> <p>The maximum permitted length for an email address is 60 characters, and 20 characters for a telephone number.</p> <p>If <b>person_type</b> is <b>S</b> or <b>E</b> then a <b>&lt;MASK&gt;</b> may be used from which email addresses are calculated for every person of that type. In this way it is possible to generate email addresses for every current student by importing a CSV file which contains a single data row.</p> <p>Telephone numbers may be preceded by 'T' to prevent their losing leading zeros, or being converted to scientific notation if saved from a spread sheet. The inclusion of embedded spaces or dashes avoids this problem. During import, any leading 'T's are removed, and a leading zero is added to any telephone number of more than 8 digits which does not already begin with 0. Any telephone numbers that were converted to scientific notation (e.g.1.234567 E+8) are not imported, and warnings are logged relating to these.</p> <p>To replace any existing emails for anyone (regardless of their <b>person_type</b>) who gains one or more emails via this import, you should include a row which contains no data other than the value <b>REPLACE_EMAIL</b> in the <b>email_phone</b> column.</p> <p>Likewise, if you wish to have any previously existing telephone records replaced, for those people who gain one or more via the import (regardless of their <b>person_type</b>), you should include a row which contains no data other than the value <b>REPLACE_PHONE</b> in the <b>email_phone</b> column.</p> <table><tr><th>person_type</th><th>surname</th><th>forename</th><th>midname</th><th>upn_adno_ni_tt</th><th>email_phone</th><th>notes</th><th>location</th><th>main</th><th>primary</th><th>use_for_fees_docs</th></tr><tr><td></td><td></td><td></td><td></td><td></td><td>REPLACE_EMAIL</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td><td></td><td></td><td>REPLACE_PHONE</td><td></td><td></td><td></td><td></td><td></td></tr><tr><td>S</td><td></td><td></td><td></td><td>Y820200109033</td><td>7753248514</td><td>test_1</td><td>H</td><td>T</td><td>F</td><td></td></tr><tr><td>S</td><td></td><td></td><td></td><td>Y820200109033</td><td>chris.aron@bt.com</td><td>test_2</td><td>H</td><td>T</td><td>T</td><td>T</td></tr><tr><td>SC</td><td>Aaron</td><td>J</td><td></td><td>Y820200109033</td><td>jack.aron@bt.com</td><td>test_3</td><td>H</td><td>T</td><td>T</td><td>T</td></tr><tr><td>SC</td><td>Aaron</td><td>J</td><td></td><td>Y820200109033</td><td>7412478624</td><td>test_4</td><td>W</td><td>T</td><td>F</td><td></td></tr></table> <p>If you discover that you have made a mistake, and imported incorrect data, it is possible to remove all email records for a given <b>person_type</b> that were imported by this utility. To do this, you need to include a row with the required <b>person_type</b> value and, in the <b>email_phone</b> column, the value <b>DEL_EMAIL</b>. This will work up until the time you apply uninstall Patch 17195, which removes the table used to record which values were imported by this utility.</p> <p><b>WARNING:</b> If you fail to apply the uninstall patch after completing the required import, and then the <b>DEL_EMAIL</b> directive is used after a future import, the <b>DEL_EMAIL</b> directive will also delete the values that you imported this time.</p> <p>Similarly, the <b>DEL_PHONE</b> directive may be used to tell the utility to remove all phone numbers (for the specified <b>person_type</b>) that were imported since the uninstall patch was last applied.</p>	person_type	surname	forename	midname	upn_adno_ni_tt	email_phone	notes	location	main	primary	use_for_fees_docs						REPLACE_EMAIL											REPLACE_PHONE						S				Y820200109033	7753248514	test_1	H	T	F		S				Y820200109033	chris.aron@bt.com	test_2	H	T	T	T	SC	Aaron	J		Y820200109033	jack.aron@bt.com	test_3	H	T	T	T	SC	Aaron	J		Y820200109033	7412478624	test_4	W	T	F	
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notes	<p>Optional, free text notes of up to 60 characters.</p> <p>Do <u>not</u> include any commas.</p>																																																																													

Column Name	Details
location	This should be one of <b>H</b> (home), <b>W</b> (work) or <b>M</b> (mobile) in the case of telephone numbers, or one of <b>H</b> or <b>W</b> in the case of email addresses.  Either the initial letter or the full word is acceptable.
main	This should be <b>T</b> if this is the main phone number for this person and location. If not, then <b>F</b> instead.  Other acceptable replacements for T are True, Y, Yes or 1. F may also be indicated by False, N, No or 0.
primary	This should be <b>T</b> if this is the primary phone number for this person over all locations. If not, then <b>F</b> instead.  Other acceptable replacements for T are True, Y, Yes or 1. F may also be indicated by False, N, No or 0.
USE_FOR_FEES_DOCS	This column makes it possible to specify whether any of the email addresses will be used for Fees documents.  <b>IMPORTANT NOTE:</b> This column <u>must</u> be added to the csv file even if you do not use Fees Billing at your school.  This should be <b>T</b> if this email address is to be used for issuing Fees documents, If not, <b>F</b> can be entered.  Other acceptable replacements for T are 1 or Y. F may also be indicated by 0, N or by leaving the space empty.

3. Save and close the EMAIL\_PHONE.CSV file.
4. Apply Patch 23212 using dbUpgrade. This validates the data in the .CSV file and imports the email addresses and telephone numbers.

## Viewing the DBDIAGNOSE Report

When Patch 23212 is run, a log file is produced that can be viewed by running the DBDIAGNOSE\_EMAIL\_PHONE\_IMPORT\_REPORT.SQL script from the DBDIAGNOSE.exe.

This report may contain any of the following warning messages to indicate that problems were detected with the import of the .CSV file:

'<N> row(s) not imported because [person\_type] is not one of S, E, SC or EC'.

'<N> row(s) not imported because [location] is not H, M or W'.

'<N> row(s) not imported because [main] is not T or F'.

'<N> row(s) not imported because [primary] is not T or F'.

'<N> row(s) not imported because [upn\_ni\_tt] is supplied for person\_type E'.

'<N> row(s) not imported because upn\_ni\_tt [XXX] is not the UPN of a current student'. This only applies to records with the person\_type of S or SC.

'Not imported because student UPN or person name not recognised'. This indicates that any rows listed under this heading were ignored by the import process.

'Not imported because the email addresses are not valid or are over 60 characters long or contain <or>'. This displays the email addresses that exceed 60 characters in length, are missing the characters '@' and '.' or that contain an unrecognised tag.

The DBDIAGNOSE\_EMAIL\_PHONE\_IMPORT\_REPORT lists all email addresses for each person\_type for which an email address was imported. Email addresses that have been imported using this utility are marked with a + before the location code and number. Between the number and any notes, there is an indication of the status of the number: **m** indicates a **main** number, **p** indicates a **primary** number and a **\*** indicates that the number is both a **main** and a **primary** number.

## Alternative CSV File Format: Using an Email Mask with Tags

The use of an email <MASK> can only be applied to [person\_types] of S and E. It is only required where an email address is composed of constant sections and sections containing employee or student names, or other identifying components.

When creating the .CSV file, enter the code <MASK> into the [upn\_ni\_tt] column and leave the [forename], [midname] and [surname] columns blank. In the [email\_phone] column, instead of entering an actual email address, enter a <MASK> to serve as an email address template, e.g. <FORENAME>.<SURNAME>@ourschool.edu.uk.

The use of a <MASK> also requires you to specify a value in the [location], [main] and [primary] columns. These values are applied to all email addresses that are subsequently created for the selected group of people.

If there is more than one person with the same name in the selected group, email addresses are allocated as follows: [fred.bloggs@ourschool.edu.uk](mailto:fred.bloggs@ourschool.edu.uk), [fred.bloggs\\_2@ourschool.edu.uk](mailto:fred.bloggs_2@ourschool.edu.uk) and [fred.bloggs\\_3@ourschool.edu.uk](mailto:fred.bloggs_3@ourschool.edu.uk), etc.

## Recognised Tags

The following tags can be used in the CSV file:

<FORENAME>  
<SURNAME>  
<MIDNAME>  
<LEGALSURNAME>  
<CHOSENFORNAME>  
<INITIAL>  
<INITIALS>  
<ADNO>  
<UPN>.

Any spaces between tags are automatically removed when the email addresses are created. If a value has not been specified for a tag, an empty string is created instead.

The tag <INITIAL> is replaced by the first character of the person's [forename].

The tag <INITIALS> is replaced by the first characters of the names entered in the [forename] and [midname] columns.



**NOTE:** To ensure accurate email addresses are created, tags must be spelt correctly.

## Removing the Temporary Files Created by the Import Process

You can now apply Patch 17195 using dbUpgrade.

When Patch 17195 is applied, the temporary files created for the import of the .CSV file are removed. Additionally, the underlying data tables that hold the + indicator, are removed so that you can no longer ascertain which email addresses or telephone numbers were imported into SIMS using this utility.



**WARNING:** *If you fail to apply the uninstall patch after completing the required import, and then the **DEL\_EMAIL** directive is used after a future import, the **DEL\_EMAIL** directive will also delete the values that you imported this time.*

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