

Import Tool Training

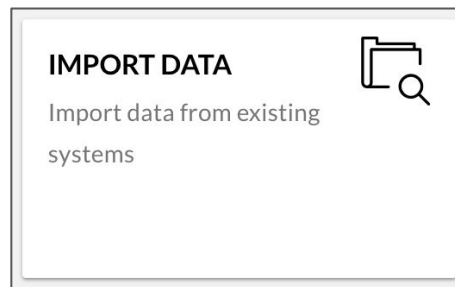
*An overview of why and how to use the data import tool,
common scenarios, and best practices*



PeopleGrove®

Import Tool Training

- ❖ Why is importing data into PeopleGrove valuable?
- ❖ Tool Access & Location
- ❖ Preparing your data for success
- ❖ Common challenges
- ❖ Types of Imports
- ❖ Basic User Import Walkthrough
- ❖ Understanding Import Results
- ❖ Error Reports
- ❖ Advanced Imports
- ❖ Next Steps



What are “Data Imports”?

- ❖ Who are you inviting to the platform?
 - May include current students, alumni, faculty, or staff
- ❖ User data from another software,
 - Alumni database or student registrar (i.e. Ellucian, Blackbaud, iModules, etc.)

Importing data means bringing information that you've saved with another source into your PeopleGrove platform.



Where will you get your data from?



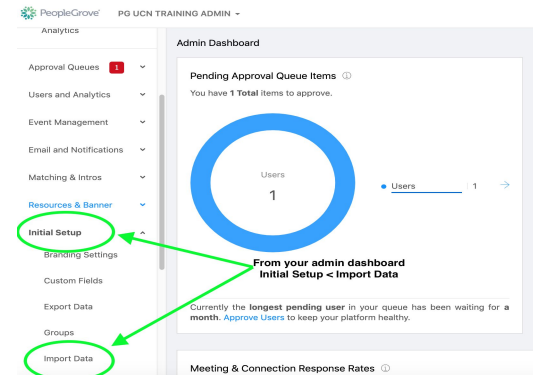
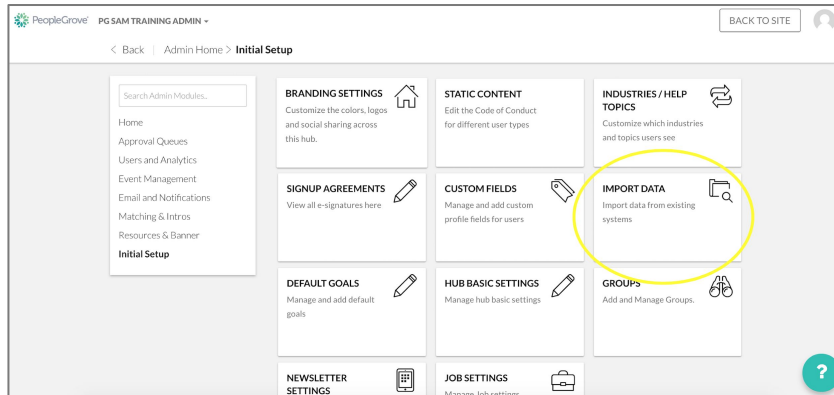
Why is importing data into PG valuable?

Better End-User Experience	Reduced Admin Work
• Customized invitation email and join token • No need to verify email • Pre-filled content • Automatically approved onto the site, no wait time needed	• Ability to select different audiences based on data/filters • No need to manually approve users • Identity verification • Ability to use the PG email tool and with it see all email analytics • Ability to more easily export or sync data with other database systems



Tool Access & Location

- ❖ Provide access for those who understand import systems and data
- ❖ Find the tool:
 - Sign up on your platform
 - Get admin permission and access to the import tool
 - Navigate to the tool: HUB ADMIN -> INITIAL SETUP -> IMPORT DATA



Admins: Configure Access

CAREER & ALUMNI SUCCESS ADMIN

Quick Links

- Apps & Integrations
- Bulk Emails
- Explore Users
- Insights
- User Interactions
- User Type Settings

Admin Dashboard

Pending Approval Queue Items ①

You have 3 Total Items to approve.

Users

3

Users | 3 →

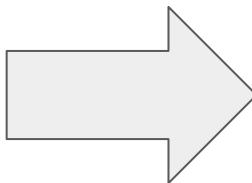
Data Viewer

Identify the longest pending user in your queue has been waiting for a month. Approve Users to keep your platform healthy.

Meeting & Connection Response Rates ①

Sent by Alumni

Manage Admins



ACCESS GROUPS

Showing Permission of Data Import Admin

+ Add Access Group

Remove Group

Approval Queues	☐
Users and Analytics	☐
Analytics	☐
Meeting History	☐
Explore Users	☒
Manage Mentorship	☐
Manage Admins	☐
Feedback Dashboard	☐
User Update Report	☐
Event Management	☐
Email and Notifications	☐
Matching & Intros	☐
Resources & Banner	☐
Initial Setup	☐
Branding Settings	☐
Network Settings	☐
Invite Page	☐
Static Content	☐
Industries / Help Topics	☐
Signup Agreements	☐
Custom Fields	☐
Import Data	☒
Export Data	☒
Secure File Storage	☒



Who gets access?



Preparing your Data for Success

- ❖ Use the [example spreadsheet](#)
 - Follow PeopleGrove's rules for data formatting
- ❖ Data that is not formatted exactly, will be rejected by the import tool
 - [Degree type](#)/Majors
- ❖ Data needs to be submitted as a **comma-separated values (CSV)** file



Review your data for potential errors *before* processing

- ❖ Check that data **matches custom field** list values or special keys
- ❖ Check for **duplicates**
- ❖ Check for **incorrect/blank emails**
- ❖ **Remove** blank rows and columns
- ❖ Check for **leading or trailing “spaces”**
- ❖ Review a full list of “**considerations**”, [here](#).



What are some points you remember?



Mandatory Considerations:

- ❖ **File format MUST be CSV** (comma-separated value) file.
- ❖ **No Excel Files** - They will fail or cause issues.
- ❖ **Emails and Database Keys must be unique.** There CANNOT be any duplicate email addresses in the system. Blanks count as duplicates.
- ❖ **Users MUST have Email, Fname and Lname.** (they are required)
- ❖ **Imported Custom Field values MUST match** those in PeopleGrove
- ❖ Follow the order of Imports: **USERS** must be loaded before education and employment records.

99% of import errors can be traced to these considerations



Types of Data Imports

- ❖ The system can support imports for new users or updates to records based on *database key* or *email*.

Sequence	Import Name	Explanation
#1	Import Users (Basic Import)	Used to pre-populate user info. This import is particularly important for getting email addresses pre-loaded into the system to send invitations.
#2	Import User Schools	Used to pre-populate user education Information
#3	Import User WorkHistory	Used to pre-populate work related user information
#4	Import User to Group / Program	Importing Program or Group specific information or roles. Also used for “pre-approving” into a program.
#5	Import Expertise / Industries	An imported list of expertise and help topics into the industries/help topics tool
#6	Import User Expertise / Industries	Pre-populate chosen expertise of help topics for users

✓ Import Users
Import User Schools
Import User WorkHistory
Import Expertise / Industries
Import Help Topics
Import User to Groups / Program
Import User Expertise / Industries
Import User Help Topics



Secondary Data Imports

- ❖ You must run a **User Import first** before running secondary import
 - *Education, Work and Program/Group imports can only occur after a basic user import.*
- ❖ For updates to education and work information, data elements can be **appended** or **overwritten**. Updates will not automatically check for duplicates.
- ❖ You **can't overwrite** an education record **created or edited by end users** (Unless you use Import Behavior: Update Only)
- ❖ For updated user profile information, data is overwritten if specified.



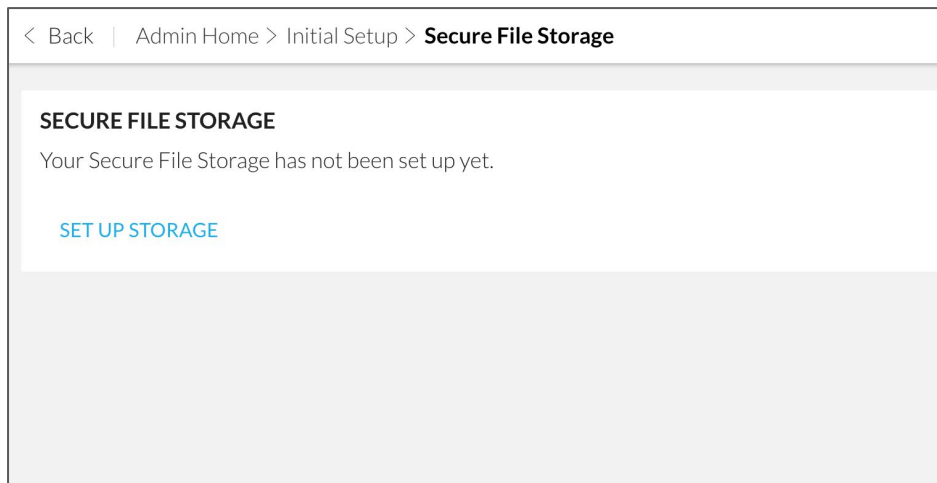
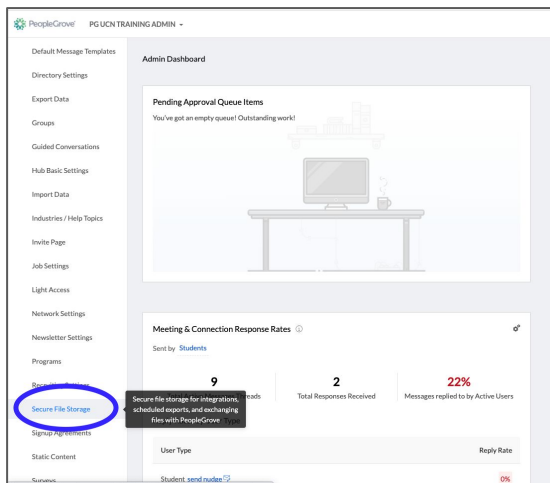
What is a “User Tag”?

- ❖ A “User Tag” allows admins to **easily identify specific populations**
- ❖ The PG system automatically adds a user tag to every import;
 - You can add a **second tag manually** so you can quickly identify an audience (i.e. Alumni Invite March 2019).
- ❖ These can be **filtered** by and **edited in** Explore Users
- ❖ We do not recommend adding punctuation or special characters to a user tag



Setting up your Secure File Storage

- ❖ PeopleGrove Admins can generate a secure file directory hosted by Amazon S3. This location can be used to share files, [upload daily batch imports or retrieve daily exports.](#)



Let's walk through a basic user import!

Steps to Success:

1. Format your file with data, ensure “required” fields are completed
2. Download the file into a .CSV format
3. **Give yourself time!** This is not a last minute process. Make sure you are prepared a day in advance if necessary
4. Navigate to the Import Tool
5. Start a New Import
6. Enter Import Details
7. Select Behaviors
8. Match Users On
9. Map Headers
10. Visually Confirm the Data. Press Next.
11. Let the data process
12. Review the results of the import
13. Next Steps: Fix any errors, potentially re-import error file; run secondary “advanced” imports; invite users



Let's walk through a basic user import!

Step 1 + 2: Format your file, download as .CSV

Example Basic User File: [User Data Sheet](#)

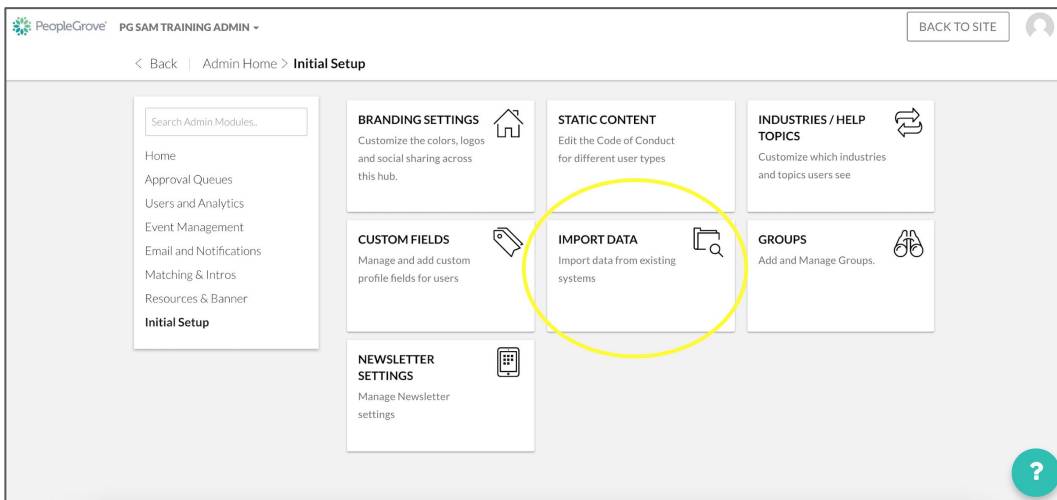
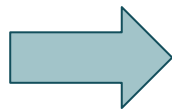
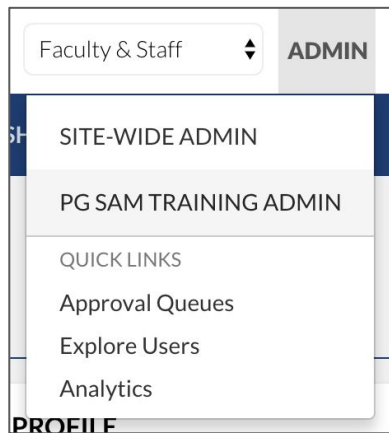
- You'll note that some fields are “recommended” others are “required”.
- The system will not process a row that is missing required info (i.e. if there's no email, you'll get a warning and the row will not process)

Email Address	Database ID	First Name	Last Name	User Type	Location
Required	Recommended	Required	Required	Optional	Optional
trainingfred@peoplegrove.com	223344	Fred	Smith	Alumni	San Francisco, CA
trainingfred@peoplegrove.com	223345	Sarah	Stedman	Alumni	Fresno, CA
traininggeorge@peoplegrove.com	223346	George	Williams	Student	San Francisco, CA
trainingcaroline@peoplegrove.com	223347	Caroline	McKay	Student	Berkeley, CA
trainingmaya@peoplegrove.com	223348	Maya	Anderson	Student	Tiburon, CA



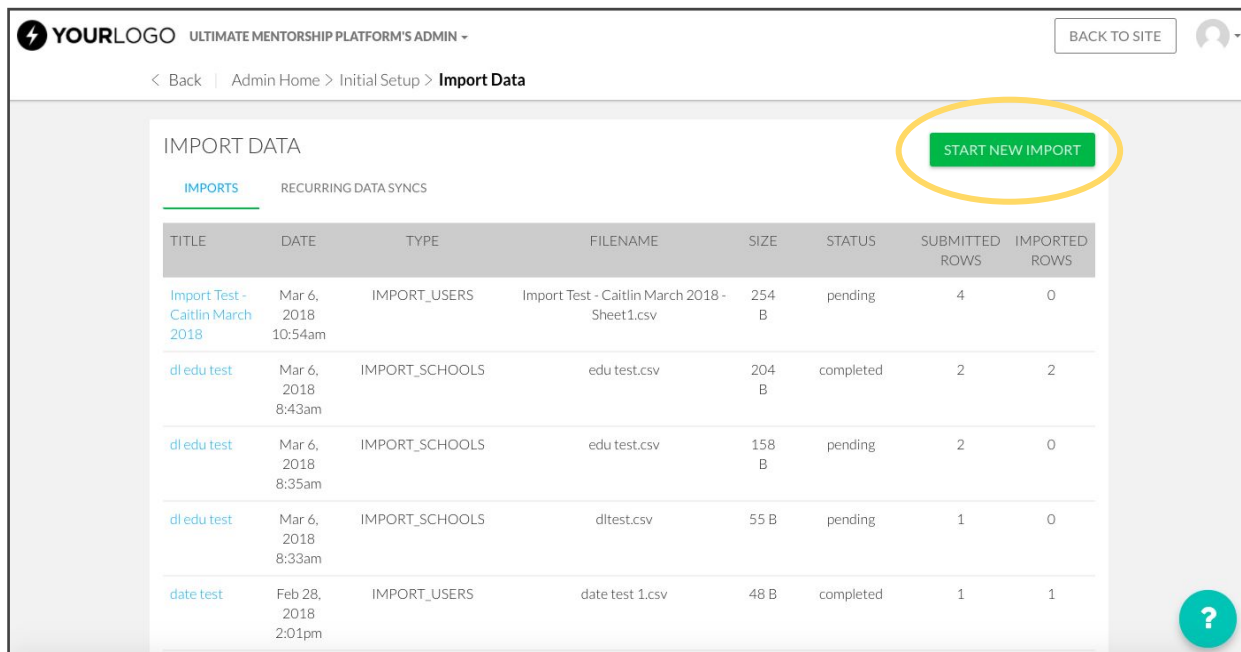
Let's walk through a basic user import!

Step 3: Navigate to the Import Tool



Let's walk through a basic user import!

Step 4: Start a New Import



The screenshot displays the 'Import Data' section of an admin dashboard. At the top, there's a navigation bar with 'YOURLOGO', 'ULTIMATE MENTORSHIP PLATFORM'S ADMIN', and a 'BACK TO SITE' button. Below this is a breadcrumb trail: '< Back | Admin Home > Initial Setup > Import Data'. The main content area is titled 'IMPORT DATA' and has two tabs: 'IMPORTS' (active) and 'RECURRING DATA SYNC'S'. A green button labeled 'START NEW IMPORT' is highlighted with a yellow circle. Below the tabs is a table with the following columns: TITLE, DATE, TYPE, FILENAME, SIZE, STATUS, SUBMITTED ROWS, and IMPORTED ROWS. The table contains five rows of import data.

TITLE	DATE	TYPE	FILENAME	SIZE	STATUS	SUBMITTED ROWS	IMPORTED ROWS
Import Test - Caitlin March 2018	Mar 6, 2018 10:54am	IMPORT_USERS	Import Test - Caitlin March 2018 - Sheet1.csv	254 B	pending	4	0
dl edu test	Mar 6, 2018 8:43am	IMPORT_SCHOOLS	edu test.csv	204 B	completed	2	2
dl edu test	Mar 6, 2018 8:35am	IMPORT_SCHOOLS	edu test.csv	158 B	pending	2	0
dl edu test	Mar 6, 2018 8:33am	IMPORT_SCHOOLS	dltest.csv	55 B	pending	1	0
date test	Feb 28, 2018 2:01pm	IMPORT_USERS	date test 1.csv	48 B	completed	1	1



Let's walk through a basic user import!

Step 5: Enter Import Details: Import Title, Choose a CSV File, Select Type, Add a User Tag (Optional). You'll need to press “Enter/Return” after typing in the user tag for it to add properly.

The screenshot shows the 'ADD IMPORT JOB' modal in the 'YOURLOGO' admin interface. The modal is titled 'ADD IMPORT JOB' and contains the following fields and options:

- Import Title:** A text input field with the value 'Test Import'.
- File:** A section titled 'SELECT FILE' with a note 'Must be CSV format'.
- Type:** A dropdown menu with the selected option 'Import Users'.
- User Tags (optional):** A text input field with the value 'Test Import - March 2018 X'. Below this field is a note: 'Press "enter" or "comma" to add Tag'.
- Comma separated tags:** A text input field with the value 'Test Import - March 2018 X'.
- Adding a tag will let you filter these users for reporting and for sending emails to a specific group.**

At the bottom of the modal are two buttons: 'CANCEL' and 'CREATE IMPORT JOB'.

In the background, the 'IMPORT DATA' section is visible, showing a table of imports and a 'START NEW IMPORT' button.

TITLE	DATE
Import Test - Caitlin March 2018	Mar 6, 2018 10:54am
dl edu test	Mar 6, 2018 8:43am
dl edu test	Mar 6, 2018 8:35am
dl edu test	Mar 6, 2018 8:33am

IMPORT_USERS	date test 1.csv	48 B	completed
1	1		



Let's walk through a basic user import!

Step 6: Select Behaviors

YOURLOGO ULTIMATE MENTORSHIP PLATFORM'S ADMIN

< Back | Admin Home > Initial Setup > Import Data > Job

IMPORT TEST - CAITLIN MARCH 2018

Submission Date: Mar 6, 2018 10:54am File: Import Test - Caitlin March 2018 - Sheet1.csv (254 B) Status: pending

Total Submitted: 4 Total Rows Processed: 0 Type: IMPORT

Total User Imported:

Import all users as a specific user type (optional)
Important: If this option is selected, user type matching below is ignored.

Import Behavior
Choose what all you want to import / update

Match Users On
Users will be matched on basis of Email / Database Key

User Tags
User tags associated with this import:

Imported Header Mapped Header Behavior when updating Sample Data

Imported Header	Mapped Header	Behavior when updating	Sample Data
Email Address	Email Address		alison1@people; brandon1@people; charles1@people;

✓ Import New Only
Update Only
Both Import or Update

Import New Only = Brand New records not previously loaded into the PG system

Update Only = Records already in the system, you're adding more data (i.e. a new custom field is being populated with data)

Both Import and Update = Some users are brand new records, others have been previously imported in the past



Let's walk through a basic user import!

Step 6: Select Behaviors

- If updating records, you'll also have to choose from a dropdown behaviors for specific data

Import all users as a specific user type (optional)
Important : if this option is selected, user type mapping done below is ignored.

Import Behavior
Choose what all do you want to import / update

Match Users On
Users will be matched on basis of Email / DatabaseKey

User Tags
User tags associated with this import:

Select...

Update Only

☒ Email ☐ Database Key

Import on 01/31/2019: TEST

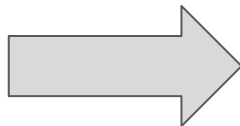
Imported Header	Mapped Header	Behavior when updating	Sample Data		
First Name	First Name	Select...	Terrence	Mikayla	Dawn
Last Name	Last Name	✓ Do not update Update only when blank Only matched users who have not joined Always overwrite	Ambarian	Arumemi	
Email	Email Address		3@pitt.edu	mka33@pitt.edu	Daa77@pitt.edu



Let's walk through a basic user import!

Step 6: Select Behaviors

- If updating records, you'll also have to choose from a dropdown behaviors for specific data



Do Not Update = The data will not change

Update Only When Blank = If you have a new field, or data was previously not entered, this could be useful

Only Match Users who have not joined = This will only update for users that haven't started platform signup

Always Overwrite = Helpful for admin only fields or database ID numbers



Let's walk through a basic user import!

Step 7: Match Users On

- If updating records, best practice is to map based on a Database Key

Import all users as a specific user type (optional)
Important : if this option is selected, user type mapping done below is ignored.

Import Behavior
Choose what all do you want to import / update

Match Users On
Users will be matched on basis of Email / DatabaseKey

User Tags
User tags associated with this import:

Select...

Import New Only

☒ Email

☐ Database Key

Import Test - Caitlin March 2018, Import on 03/06/2018: Import Test - Caitlin March 2018



Let's walk through a basic user import!

Step 8: Map Headers

- On the “imported header” column, you’ll see the names of your file
- In “Mapped Header” you’ll want to choose the corresponding option to map to in the PG system

IMPORT TEST - CAITLIN MARCH 2018

Submission Date: Mar 6, 2018 10:54am

File: [Import Test - Caitlin March 2018 - Sheet1.csv](#) (254 B)

Status: pending

Total Submitted: 4

Total Rows Processed: 0

Type: IMPORT_USERS

Import all users as a specific user type (optional)

Important : if this option is selected, user type mapping done below is ignored.

Select...

Import Behavior

Choose what all do you want to import / update

Import New Only

Match Users On

Users will be matched on basis of Email / DatabaseKey

☒ Email ☐ Database Key

User Tags

User tags associated with this import:

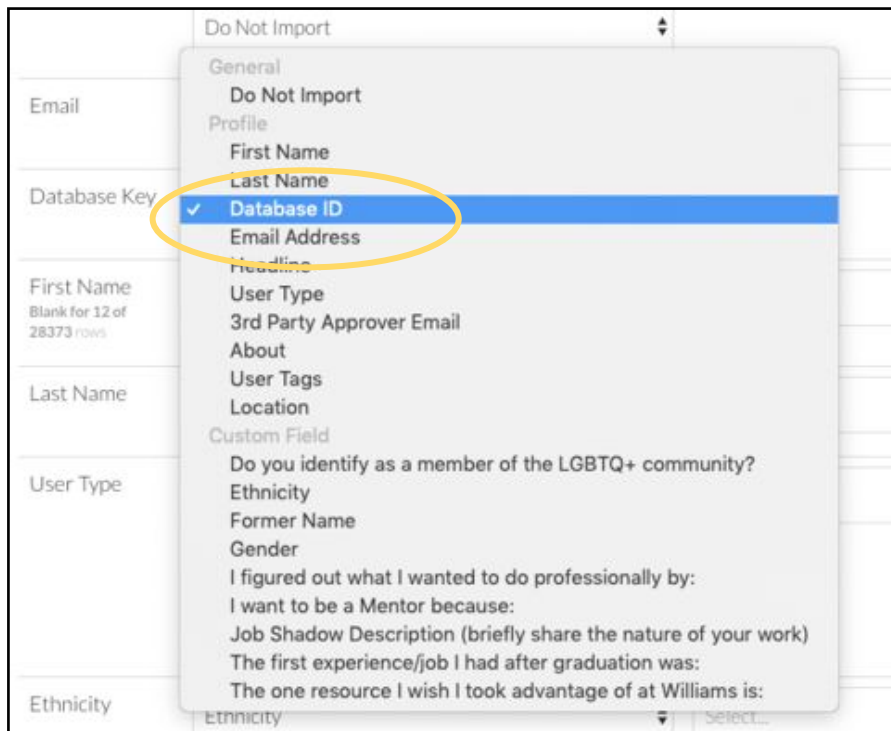
Import Test - Caitlin March 2018, Import on 03/06/2018; Import Test - Caitlin March 2018

Imported Header	Mapped Header	Sample Data		
Email Address	Email Address	alison1@peoplegrove	brandon1@peoplegrove	charles1@peoplegrove
Database ID	Database ID	12345	23456	34567
First Name	First Name	alison	brandon	charles
Last Name	Last Name	peoplegrove	peoplegrove	peoplegrove

NEXT

Let's walk through a basic user import!

- **Note:** You'll notice when you map "Database Key" you'll see a "Database ID" option. These are the same.



Let's walk through a basic user import!

Step 9: Visually Confirm the Data. Press Next.

IMPORT TEST - CAITLIN MARCH 2018

Submission Date: Mar 6, 2018 10:54am

File: [Import Test - Caitlin March 2018 - Sheet 1.csv](#) (254 B)

Status: pending

Total Submitted: 4

Total Rows Processed: 0

Type: IMPORT_USERS

Import all users as a specific user type (optional)

Important: If this option is selected, user type mapping done below is ignored.

Select...

Import Behavior

Choose what all do you want to import / update

Import New Only

Match Users On

Users will be matched on basis of Email / DatabaseKey

☒ Email ☐ Database Key

User Tags

User tags associated with this import:

Import Test - Caitlin March 2018, Import on 03/06/2018: Import Test - Caitlin March 2018

Imported Header	Mapped Header	Sample Data		
Email Address	Email Address	alison1@peoplegrove	brandon1@peoplegrove	charles1@peoplegrove
Database ID	Database ID	12345	23456	34567
First Name	First Name	alison	brandon	charles
Last Name	Last Name	peoplegrove	peoplegrove	peoplegrove

NEXT



Let's walk through a basic user import!

Step 10: Let the data process

- Depending on the file size, this might take several hours.
- You can always leave the import processing area, and return to check on the status later.

IMPORT TEST - CAITLIN MARCH 2018

Submission Date: Mar 6, 2018 10:54am	File: Import Test - Caitlin March 2018 - Sheet1.csv (254 B)	Status: readyToCreate
Total Submitted: 4	Total Rows Processed: 0	Type: IMPORT_USERS
Total User Imported:		

Your import data request is in progress. It may take a few minutes to complete, or longer if this is a large file. This page will automatically update when complete, or you may come back later.



Let's walk through a basic user import!

Step 11: Review the results of the import.

- Download the error CSV

YOURLOGO ULTIMATE MENTORSHIP PLATFORM'S ADMIN

BACK TO SITE

< Back | Admin Home > Initial Setup > Import Data > Job

IMPORT TEST - CAITLIN MARCH 2018

Submission Date: Mar 6, 2018 10:54am File: [Import Test - Caitlin March 2018 - Sheet1.csv](#) (254 B) Status: completed

Total Submitted: 4 Total Rows Processed: 3 Type: IMPORT_USERS

Total User Imported: 3 [View Import Jobs Settings](#)

Import Job is completed however we couldn't import some of the data.

DOWNLOAD ERROR CSV

ERROR ROWS

Last Name	First Name	Database ID	Email Address	Error
peoplegrove	alison	12345	alison1@peoplegrove.com	A user with the databaseKey already exists.

3 users imported successfully. Would you like to send them an Invitation email to join platform.

SEND INVITATION EMAIL

?



Let's walk through a basic user import!

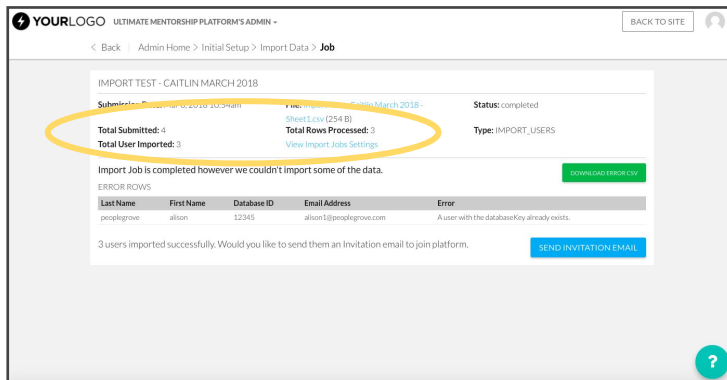
Step 12: Next Steps

- Fix any errors, potentially re-import error file
- run secondary “advanced” imports
- invite users



Understand Import Results

- ❖ What does the language on this screen mean?



Total Submitted	Total Users Processed	Total Rows Imported
How many rows were on the imported CSV spreadsheet	How many rows were submitted into the Import Tool	How many actually worked

Difference = Total Errors, Including Duplicates

Difference = Duplicates Only



Understanding Errors

- ❖ A summary of errors will automatically display
- ❖ You can also “download Error CSV” to view all errors

PROGRAM TEST

Submission Date: Sep 17, 2018 3:23 pm

File: [programtestimport.csv](#) (70 B)

Status: completed

Total Submitted: 2

Total Rows Processed: 1

Type: IMPORT_GROUP_USERS

Total User Imported: 1

[View Import Jobs Settings](#)

Import Job is completed however we couldn't import some of the data.

[DOWNLOAD ERROR CSV](#)

ERROR ROWS

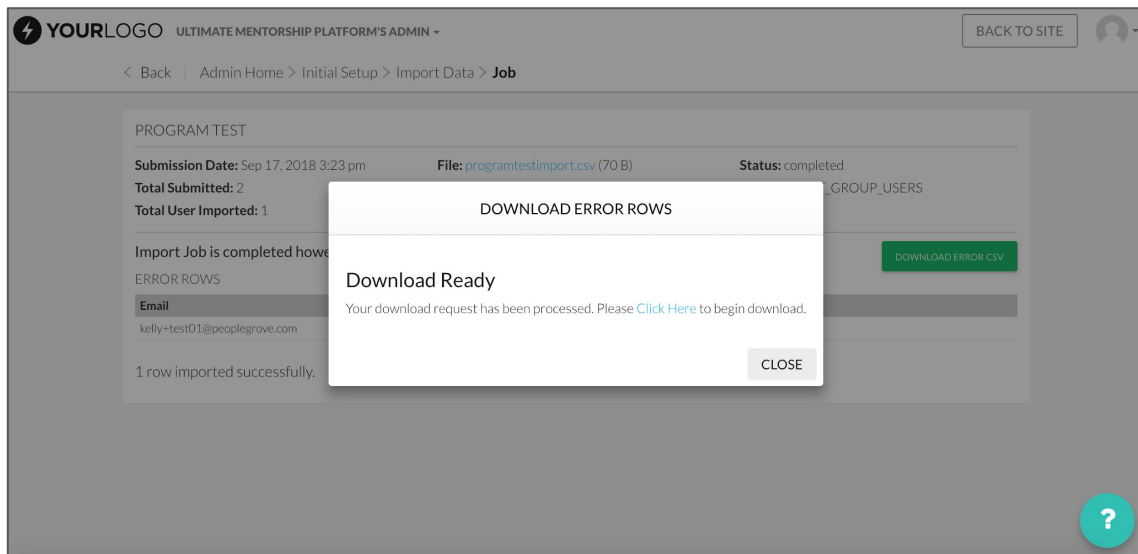
Email	Error
kelly+test01@peoplegrove.com	Unable to find Matching User

1 row imported successfully.



Understanding Errors

- ❖ When you download an Error CSV, a popup will show
- ❖ Sometimes if error files are big, this file can take time to process



Understanding Errors

- ❖ The CSV File contains a column called “error” which explains the reason why the record didn’t process successfully

	A	B	C	D	
1	Last Name	First Name	ÊªøEmail Address	error	
2	Sayres	John	Kelly+programtest3@peoplegrove.com	Unable to find Matching User	
3	Sayres	Dayna	Kelly+programtest4@peoplegrove.com	Unable to find Matching User	
4					
5					
6					



Secondary Imports

- ❖ All “secondary imports” are dependent on an Initial Users Imports
 - Education
 - Work History
 - Programs/Groups
 - Industries/Expertise List
 - Industry/Expertise User Data
- ❖ Refer to the [import template sheets](#) for formatting



Education Imports

- ❖ These need to process after a basic user import
- ❖ Best Practice is to match on Database ID
- ❖ Majors needs to be formatted in a JSON array

Email	Database key	School	Major	Degree Type	Graduation Year
Required	Recommended	Required	Optional	Optional	Optional
trainingfred@peoplegrove.com	223344	University of Toronto	["English"]	Bachelor's Degree	2012
trainingfred@peoplegrove.com	223345	University of Toronto	["Communications"]	Bachelor's Degree	2002
traininggeorge@peoplegrove.com	223346	University of Toronto	["Biology", "Statistics"]	Bachelor's Degree	2020
trainingcaroline@peoplegrove.com	223347	University of Toronto	["English"]	Ph.D.	2021
trainingmaya@peoplegrove.com	223348	University of Toronto	["Design", "Information Technology"]	Master's Degree	2020



Education Imports

- ❖ For education imports, “append data” is the default option
- ❖ You can adjust this and choose from a total of 3 options

Update only when blank
Always overwrite
✓ Always append

- ❖ Append Data
 - When to use this: When users have been imported, but have not signed-up and logged into the platform.
 - Data will add, not be overwritten
 - Updated education and work info will not automatically check for duplicates
- ❖ Update Only When Blank
 - Use this if you had missing data the first time
- ❖ Always Overwrite
 - Any adjustments to the existing data



Program Imports

A couple considerations:

- ❖ Program/Group imports should be *rarely* done, if ever.
- ❖ Program imports should only occur if for some reason the admin doesn't need to screen and accept users -- maybe they have vetted them in some way already.
- ❖ Most program participants are instead flagged by adding a user tag (i.e. "Program 1 Mentees") to a basic import which helps the program admin filter this audience and invite them in the hub email tool



Program Imports

- ❖ File Format, [here](#).
- ❖ These need to process after a basic user import
- ❖ Best practice is to match on Database ID
- ❖ Pre-loading role will skip this choice in program signup, and place them into the registration flow specifically for that role

Email	Database Key	Program Name	User Role	What are your passions?
Required	Recommended	Required	Optional	Optional
trainingfred@peplegrove.com	223344	PEOPLEGROVE - FAVORITE SAMPLE PROGRAM (FOR TRAINING)	Mentor	public speaking
trainingfred@peplegrove.com	223345	PEOPLEGROVE - FAVORITE SAMPLE PROGRAM (FOR TRAINING)	Both	traveling
traininggeorge@peplegrove.com	223346	PEOPLEGROVE - FAVORITE SAMPLE PROGRAM (FOR TRAINING)	Mentee	traveling
trainingcaroline@peplegrove.com	223347	PEOPLEGROVE - FAVORITE SAMPLE PROGRAM (FOR TRAINING)	Mentee	teaching
trainingmaya@peplegrove.com	223348	PEOPLEGROVE - FAVORITE SAMPLE PROGRAM (FOR TRAINING)	Both	public speaking



Program Imports

Importing into a program adds someone into a program directly -- without them filling out registration questions.

- ❖ Only do a program import if you have all the registration question data, users don't need to answer questions, and the admin is choosing the matching factors based on that imported data
- ❖ This is a rare program situation, which is why program imports don't usually occur.

Instead, we recommend the following: BASIC USER IMPORT (+ USER TAG)

- ❖ Step 1: Identify Program Invitees
- ❖ Step 2: Basic Import. Add a User Tag
- ❖ Step 3: Filter on the User Tag and Invitee
- ❖ Step 4: Review applicants and approve users



Program Imports

- ❖ Do not “Auto-approve” users into a program
 - **Not Recommended**
 - This means they bypass the approval queue
 - They are already considered program “members” if they have joined the hub, even if they haven’t registered for the program officially. This is confusing.

Import all users to Group	PEOPLEGROVE - FAVORITE SAMPLE PROGRAM (FOR TRAINING)
Approve Membership	☐ Auto Approve
Behavior while updating Please set update behavior for program	☒ Do not update
Match Users On Users will be matched on basis of Email / DatabaseKey	email
User Tags User tags associated with this import:	Program Import UNH, Import on 08/30/2018: Program Import UNH Test



Expertise/Industry Import

- ❖ You can import a list of expertise and a list of industries into the platform, which is useful to replace the PG default list
 - This is formatted as a text
- ❖ You can also import user expertise and help topics so they are pre-filled
 - This is formatted in a JSON array



Other Items

- ❖ Case sensitive database ID (i.e Daa77 on the CSV and we are trying to match it to DAA77 in the system. The system doesn't think those are identical, it won't match)



Next Steps

- ❖ Get Access to the Data Import Tool
 - If you are not the main platform admin, sync with that person
- ❖ Practice a smaller import first to feel comfortable with the tool
- ❖ Additional Resources:
 - [Advanced Data Import Help Article](#)
 - [Automated Data Integrations: From Your Database to PeopleGrove](#)
 - [Example Spreadsheet](#)
 - [API and Webhook Documentation](#)
 - [Setting Up Your Secure File Storage Bucket, Recurring Imports, and Recurring Exports](#)
 - [Custom Fields](#)
 - [Explore Users](#)



Practice!

1. User Import - New Users
2. Updating Records - New Custom Field Added
3. Adding Education Records
4. Accidentally Adding an Excel File instead of CSV



Next Steps

Check out what others have done!



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APPENDIX



Common Questions

1. Can you import multiple emails? What happens if spouses share emails?
 - The system only allows one email address - the same email cannot be used for multiple users
 - If the email is imported twice, the system will produce an error
2. Do I have to do a manual import before setting up a data sync?
 - You should be able to import the file and setup the data sync from the start
 - The template and mapped headers for data syncs work the same as the manual import process
3. How do we deal with faculty & staff that are also alumni?
 - Users must choose one user type - they cannot be both
 - Best practice is to instruct staff who are also alumni to choose the alumni user role - simply because if they leave their role, they can be a mentor on the platform
 - You can make a custom field to designate alumni that are also faculty/staff



Common Questions

1. What do we do if we have two database ID numbers?
 - You can only have one primary database ID
 - A “Secondary ID” can be populated as a custom field - this can be admin only or user facing
2. Does data import to other hubs in our multi-hub, how do we ensure consistent data across hubs and as we expand?
 - The data import tool works at the hub level
 - Teams should coordinate internally to ensure alignment on what is being asked, and data that will be important to export in the future
3. How do we track deceased individuals?
 - Recommend to not delete the users, but change their visibility to private (in explore users)
 - Recommend to create an admin only custom field to tag/identify these records

