

Import of Email Addresses and Telephone Numbers from a CSV File

ID: 18029 and 17195

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.

This utility consists of two patches and a DBDIAGNOSE script:

Patch 18029

This reads the .CSV file and adds the required email or telephone details and writes a log file to the SIMS database.

DBDIAGNOSE_EMAIL_PHONE_IMPORT_REPORT.SQL

This reports the results of the application of Patch 18029, including the details of any records that were not imported because they failed one or more of the validation rules.

Patch 17195

This patch removes the temporary files that were created by the application of Patch 18029.

Creating and Importing a .CSV File

1. Firstly, create a folder called CSV_Import on the C:\ or D:\ drive. This is where the .CSV file will be saved.
2. Secondly, 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	This indicates the type of person whose email address or telephone number will be imported. Possible values are S, E, SC and EC for student, employee, student contact and employee contact respectively. Only current students, employees or their contacts are considered for import. If email_phone holds a mask from which email addresses are to be calculated, then only S or E is allowed here. Contact emails cannot be calculated from masks.

Column Name	Details
surname	Surname of the person whose email address or telephone number will be imported. 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. To generate email addresses for all current students (who are not individually identified by other person_type S type records in this file), put <AS> here and the required mask in the email_address column. To generate email addresses for all current employees (who are not individually identified by other E type records in this file), put <AE> here and the required mask in the email_address column.
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	▪ The Unique Pupil Number (UPN) or Admission Number (ADNO*) of the student (for person_type S), or ▪ the UPN or ADNO of a student for whom the person of person_type SC is a contact, or ▪ blank for a person_type E record, or ▪ National Insurance number or Timetable Initials of the employee for whom this person of type EC is a contact, or ▪ <MASK> 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 * 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 S or SC 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.

Column Name	Details
email_phone	The email address or telephone number to be imported. 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. The maximum permitted length for an email address is 60 characters, and 20 characters for a telephone number. If person_type is S or E then a <MASK> 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. 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.
notes	Optional, free text notes of up to 60 characters. Do not include any commas.
location	This should be one of H (home), W (work) or M (mobile) in the case of telephone numbers, or one of H or W in the case of email addresses. Either the initial letter or the full word is acceptable.
main	This should be T if this is the main phone number for this person and location. If not, then F 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 T if this is the primary phone number for this person over all locations. If not, then F instead. Other acceptable replacements for T are True, Y, Yes or 1. F may also be indicated by False, N, No or 0.

3. Save and close the EMAIL_PHONE.CSV file.
4. Apply Patch 18029 using DBDIAGNOSE. The DBDIAGNOSE.exe can be found in the C:\Program Files\SIMS\SIMS .net folder. Running patch 18029 validates the data in the .CSV file and imports the email addresses and telephone numbers.

Viewing the DBDIAGNOSE Report

When Patch 18029 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, fred.bloggs_2@ourschool.edu.uk and 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: You must ensure that values are spelt correctly to result in accurate email addresses being created.

Deletion of Imported Email Addresses or Telephone Numbers

You can delete an imported email address or telephone number by entering an additional value into the [email_phone] column of the .CSV file, adjacent to the required [person_type]. The values of DEL_EMAIL or DEL_PHONE can be used as deletion indicators. Where deletion indicators are located during the import of the .CSV file, the records for the required person are removed from the SIMS database.

Removing the Temporary Files Created by the Import Process

You can now apply Patch 17195 using DBDIAGNOSE. The DBDIAGNOSE.exe can be found in the C:\Program Files\SIMS\SIMS .net folder.

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.