Tips for creating the excel sheets for the data migration to HandsOn Connect

1. The most important thing to do is to document the steps you take to get the reports and information you need for each of the HandsOn Connect tables. This is necessary since you are pulling the data simply for the pilot training and testing phase and you're site will still be active during that time frame, so before we go live you'll need to follow the steps again to capture all the data including all the new data that took place since we started the pilot phase.

   Also if there are any errors in the data you provide, we may need you to run the reports again to help us import the data in a more usable format.

   *Note- There are some tips for using and manipulating Excel files are found at the end of this document.

2. Every item needs to have an "ID" that is unique so that we can link the items. In other words, each volunteer, organization, project, occurrence, etc. needs to have a unique id so you can't use the same ID for different tables or objects. The data migration uses these IDs to link the items because your table for opportunities will have a column that uses the ID for the organization to link that project with the right organization.

   If your system does not already provide IDs for the various components or it use the same ID for multiple objects, then develop a naming convention for each item and make sure that you carry it through the various tables. We used the naming convention OR#####, CO###### where the OR or CO stands for the component (Organization, Contact, etc.) followed by a series of numbers used at that affiliate. So it didn't matter if we had OR1111 and CO1111 because the prefix made them unique.

3. Depending on how your system reporting works, one report may have information that is relevant to multiple tables. For example, your report on the projects may include the information about the project location which would need to be placed in the locations table and not the opportunities table.

4. We have worked to make the master field list match up with the column headers in the related tables. So when you are looking at the fields associated with Contacts in the Master Field List the order corresponds to the order of the column headers in the Contacts table with the Required fields at the left starting with Column A.

   It is recommended that you have the Master Field List file open as you work on your tables for reference as to how the columns should be populated to get the best results from your data. Pay close attention to the picklist values and make sure that your values are the same, including spelling. Unsure as to what information the field needs, use the help and notes columns to help you figure it out. If you still are unsure, don't hesitate to contact us for more directions.

   For the column labeled "Should be Populated?", make sure that you have all the required fields populated with the correct information, spelling, and format. If you don't have the information for the recommended fields in your data, don't worry about it, you'll be able to gather that information for those records once the information is in HandsOn Connect. Also, if you have the information for the "Not Necessary" fields, don't hesitate to include that information and we'll make sure it gets imported.

Below are samples of the Master Field List and the Contacts Table so that you can become familiar with the layout and formatting.

Master Field List:

Identifies the table the field is found in

Corresponds to the column headers in the table.

	A	B	C	D	E	F	G
1	Object	Field Label	Picklist Values	Default value	Should be Populated?	Help/Definition	Notes
2	Contact	ID			REQUIRED	This is the unique ID used to associ	
3	Contact	First Name			REQUIRED	First name of the related contact.	
4	Contact	Import_ID__c	True		REQUIRED	During data migration this is the ID a	
5	Contact	Last Name			REQUIRED	Shows the contact's last name	
6	Contact	LastModifiedDateSkillRating		current date	REQUIRED	Shows the date when the contact la	
7	Contact	Organization		Vols - "Individual"Staff -	REQUIRED	Relates the name of the organizatior	Needs to be the ID (not the name) for the relat
8	Contact	Record Type ID	Volunteer	"Volunteer"	REQUIRED	Provides the alphanumeric ID assoc	For initial data imports, enter the term "Volunt
9	Contact	Registration Status	Registered, Not Register		REQUIRED	Every contact is given a status to id	
10	Contact	Username		unique email address	REQUIRED	Every contact is given a username ir	Us their e-mail address. Make sure that e-mai
11	Contact	Accepts Invitations			RECOMMENDED	This field indicates whether or not a	
12	Contact	Alternate Email			RECOMMENDED	Volunteers are able to associate an	Make sure that e-mail addresses are properly

Contacts Table:

	A	B	C	D	E	F	G	H	I	J
1	ID	First Name	Last Name	LastModifiedD	Organization	Record Type ID	Registration Status	Username	Accepts Invitat	Alternate Emai
2										
3										
4										
5										
6										
7										
8										

Required fields for this table

Start of Recommended Fields

5. It is important that all the REQUIRED columns are populated in your tables, even when the information required is information that you don't currently collect, such as impact areas or teams. For the fields that are required, there is usually a default value given that you can use if you don't collect that information. For example, Organization Record Type is a required field that you might not already have in your data, if that is the case, simply enter the either the value of "Nonprofit" (default) or "Business" for each row in your table.

	A	B	C	D	E	F	G
1	Object	Field Label	Field Api	Field Type	Picklist Values	Default value	Should be Populated
352	Organization	ID	HOC__Import_ID__c	string			Required
353	Organization	Organization Name	Name	string			REQUIRED
354	Organization	Address Visibility	HOC__Address_Visibility__c	picklist	Display Full Address,	"City and Zip only"	REQUIRED
355	Organization	Impact Area	HOC__Impact_Area__c	multipicklist	Adult Education,	"Other"	REQUIRED
356	Organization	Import_ID__c	Import ID	string	True		REQUIRED
357	Organization	Organization Record Type	RecordTypeId	reference	Business, Nonprofit	"Nonprofit"	REQUIRED
358	Organization	Primary Contact	HOC__Primary_Contact__c	reference			REQUIRED
359	Organization	Status	HOC__Status__c	picklist	Pending, Active Partner,		REQUIRED

6. The zip file has the 9 different spreadsheets or tables that you will need to populate. Make sure that you save them in the .csv format that they are given to you in. You can approach populating the tables in two ways.

    a. You can find the column that has the information you need and just copy and paste the data from your export into the corresponding object table. Just make sure that you don't copy over the column header since that is important and can't be changed.

    b. Or, you can look at the column headings in each table and then copy the heading and replace it in the spreadsheet that your system generates.

       For Example: If your system calls the column with the agency partners name "Partner Name" you would change the name of that column on your spreadsheet to match the column name in the zip files and call it "Organization Name".

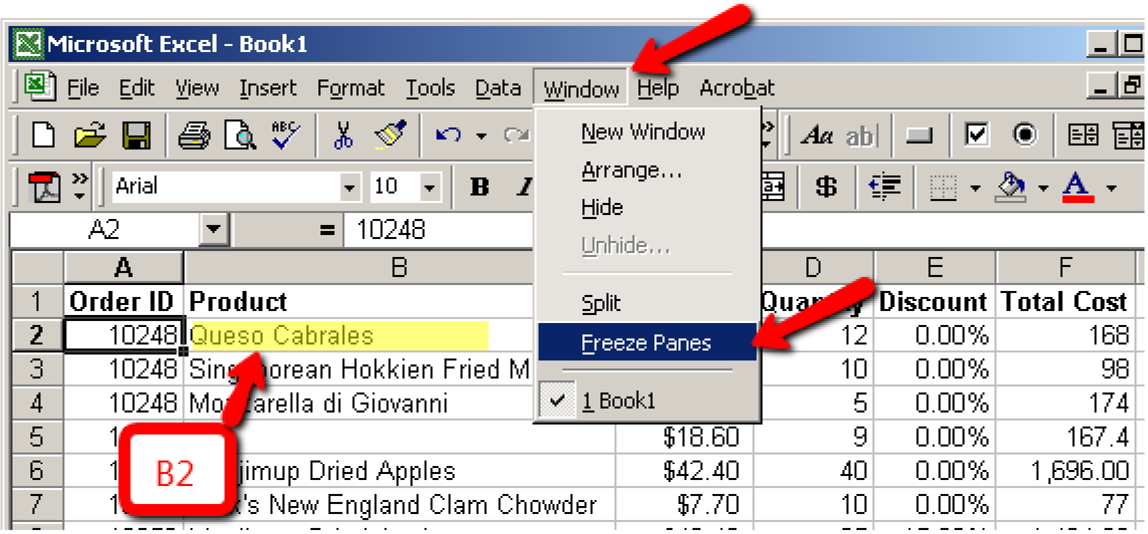
7. If you need to add a few extra columns to make sure that you are mapping the IDs properly; such as inserting a column for the name of organization that is hosting the project so that you can then match the correct ID for that Organization in the Hosting Organization column, feel free to do so.

8. Make sure to save your work often along this process and double check that you are mapping items to the right fields on the right tables.

Notes on how to Freeze Rows, Sort Data, Filter Data, or Find & Replace in Excel begin on the next page.

Microsoft Training site: http://office.microsoft.com/en-us/support/training-FX101782702.aspx
Excel Tips-

- Freeze Rows/Columns. This allows you to scroll left and right and up and down without losing the column and row headers.
    - In Excel 2003- To freeze the top row and the left column, place select cell B2 and then go to the "Window" menu and select "Freeze Panes"



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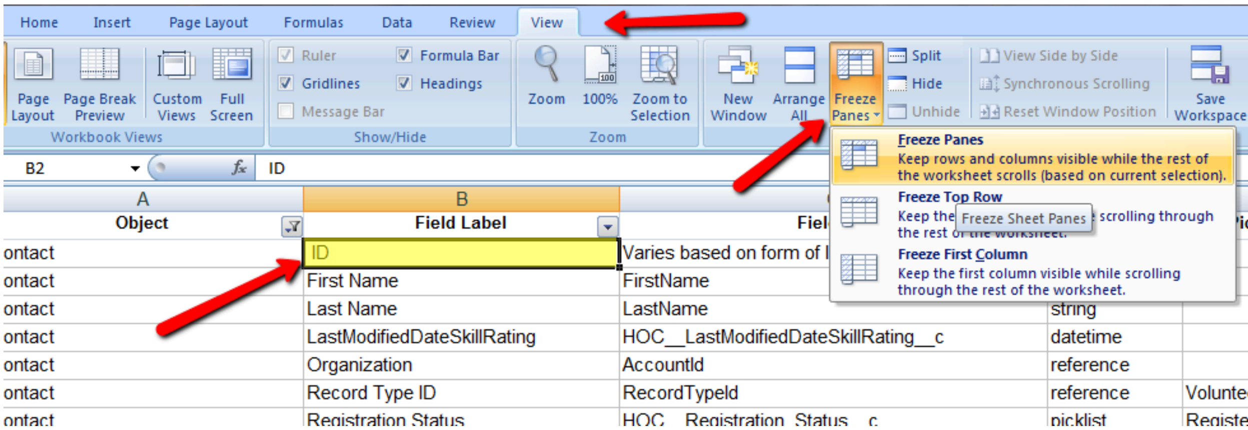
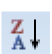
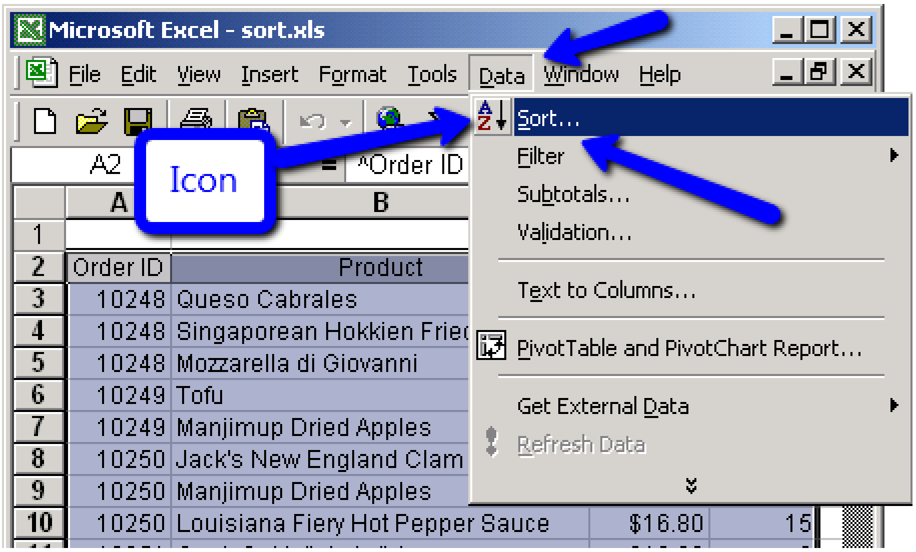
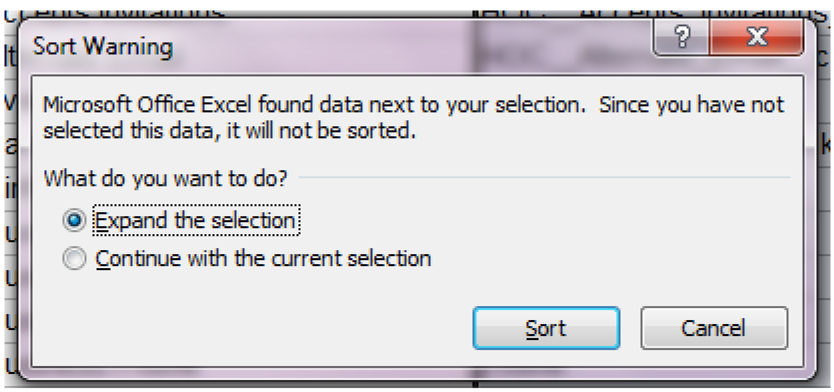
    - In Excel 2007- To freeze the top row and the left column, place select cell B2 and then go to the "View" ribbon and select "Freeze Panes"

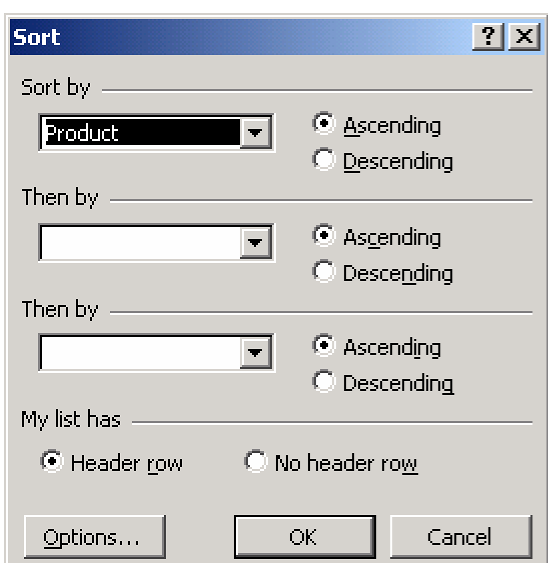


- Sorting the Cells. This allows you to alphabetize or arrange the cells in a way that can help you look through the data.
    - In Excel 2003- To sort by a column click on the column A, B, or C, etc. and then select the appropriate icon ( or ) from the top or go to the "Data" menu and select "Sort"

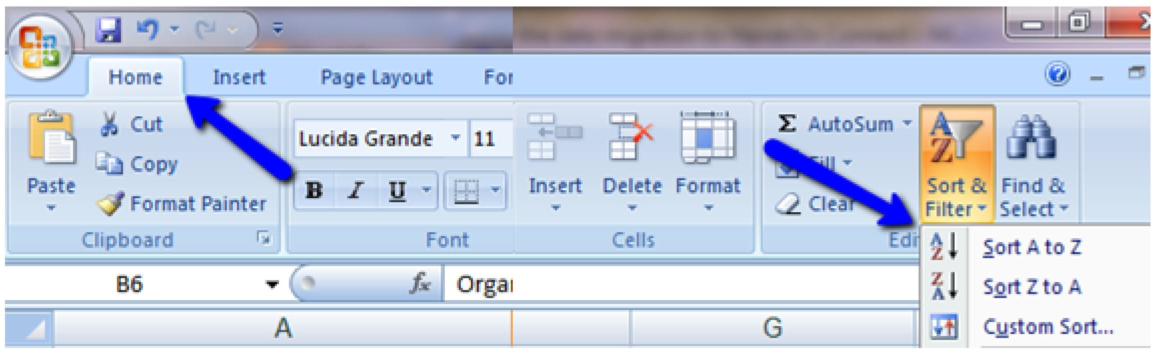
- If given the warning message to extend selection, select yes; otherwise, the data will get mixed.
- If using the "Sort" option from the "Data" menu, it'll provide you with a window to select which columns to sort by, how to sort them, and in what order to do the sort.

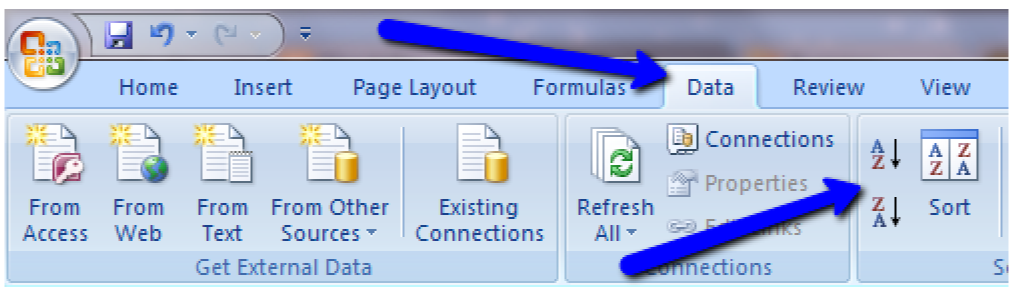


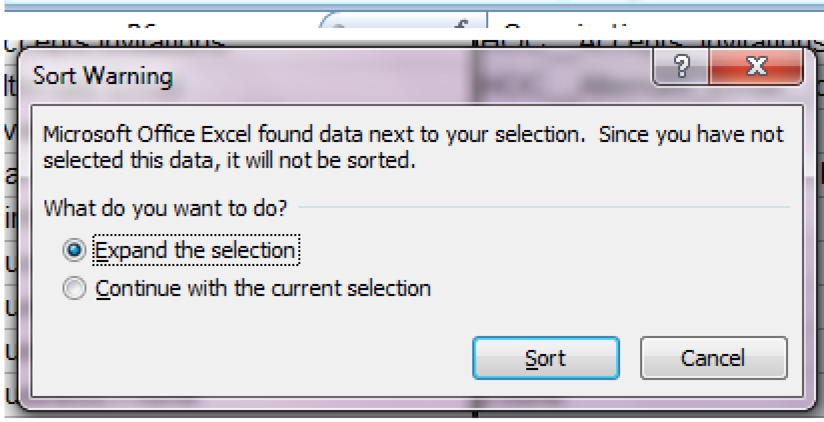


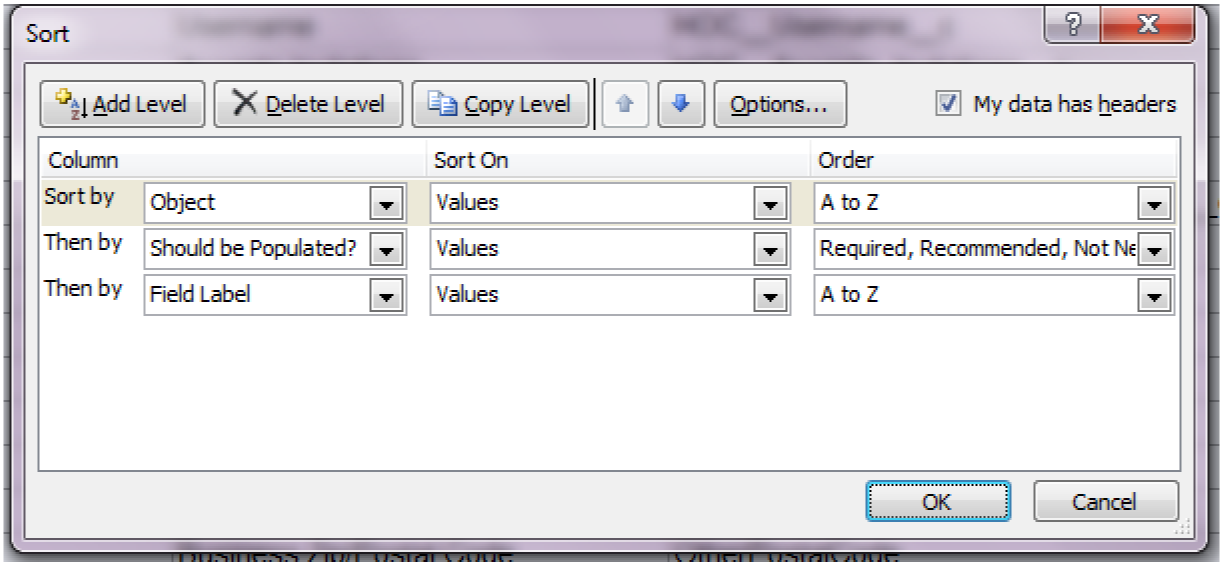


- In Excel 2007- To sort by a column click on the column A, B, or C, etc. and then select the appropriate icon ( or ) from the Sort/Filter option on the Home Ribbon or go to the Data ribbon.
- If given the warning message to extend selection, select yes; otherwise, the data will get mixed.
- If using the " Custom Sort" option from the "Data" ribbon, it'll provide you with a window to select which columns to sort by, how to sort them, and in what order to do the sort.



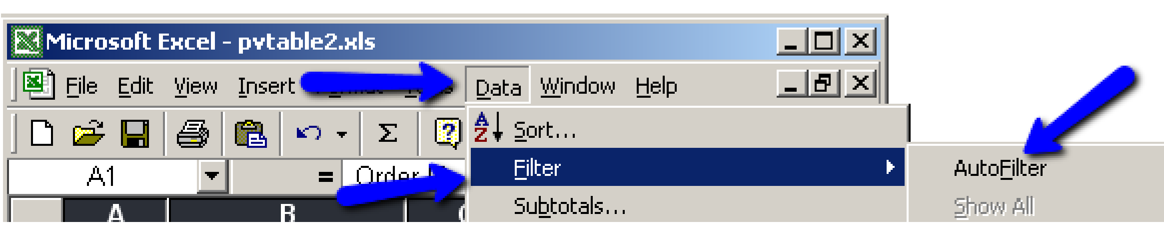


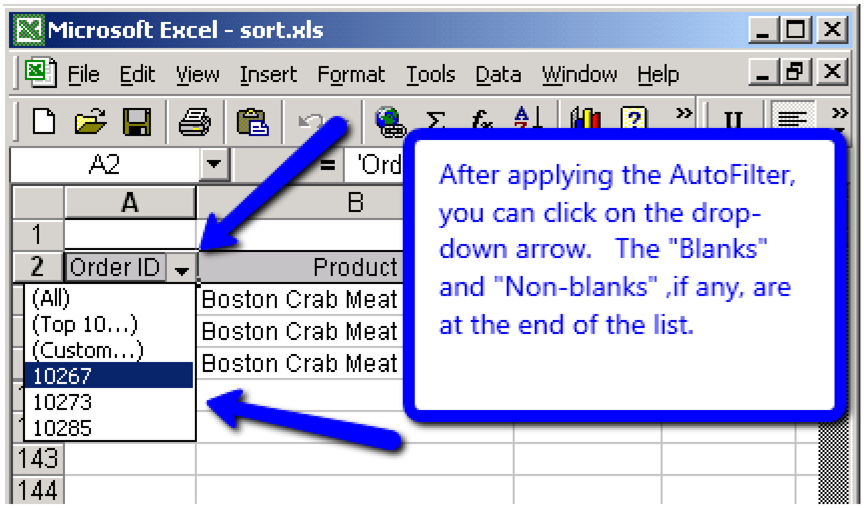




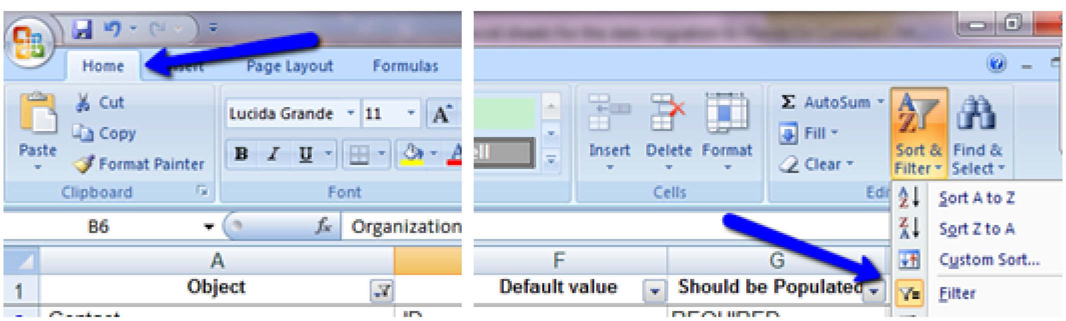
- Filter Columns. This allows you to filter the table to show the only rows that contain the requested data in that column.

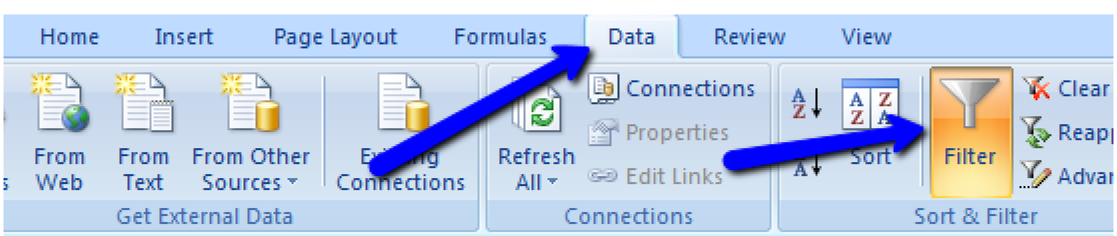
    - In Excel 2003- To apply the filters to the columns, select the entire row that you want to filter by (usually Row 1), and go to the “Data” menu and select “Filter” and then “AutoFilter.”
    - Then go to the column you wish to filter by and click on the drop-down and select the value to filter by. To select multiple values, select custom filter.
    - You can use this drop-down to also find all the columns with required data to show the rows that are “Blank” or “Non-Blank.”
    - You can also filter by multiple columns by filtering the columns one-by-one.
    - If you want you can also copy and paste the filtered data into a new excel table if you wish.

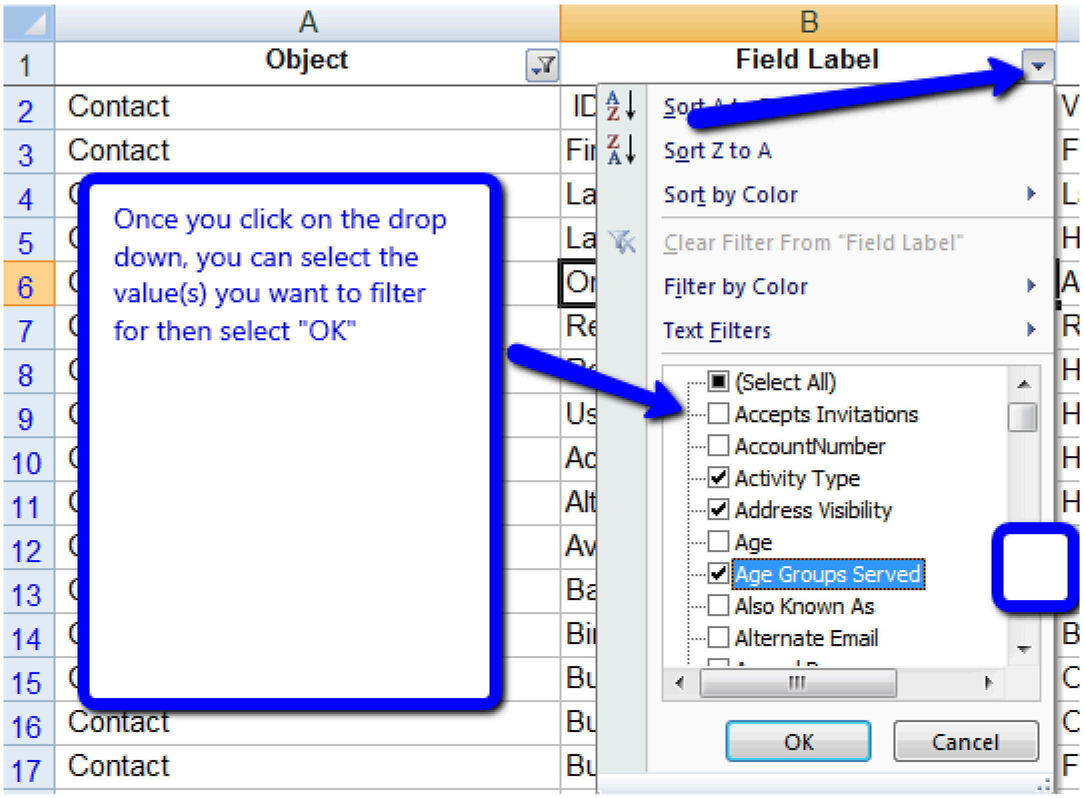




- In Excel 2007- To apply the filters to the columns, select the entire row that you want to filter by (usually Row 1), and go to the "Data" menu and select "Filter" and then "AutoFilter."
- Then go to the column you wish to filter by and click on the drop-down and select the value to filter by clicking on the check box. It is best to uncheck the box next to "select all" first if you only wish to have a few values.
- You can use this drop-down to also find all the columns with required data to show the rows that are "Blank" or "Non-Blank."
- You can also filter by multiple columns by filtering the columns one-by-one.
- If you want you can also copy and paste the filtered data into a new excel table if you wish.

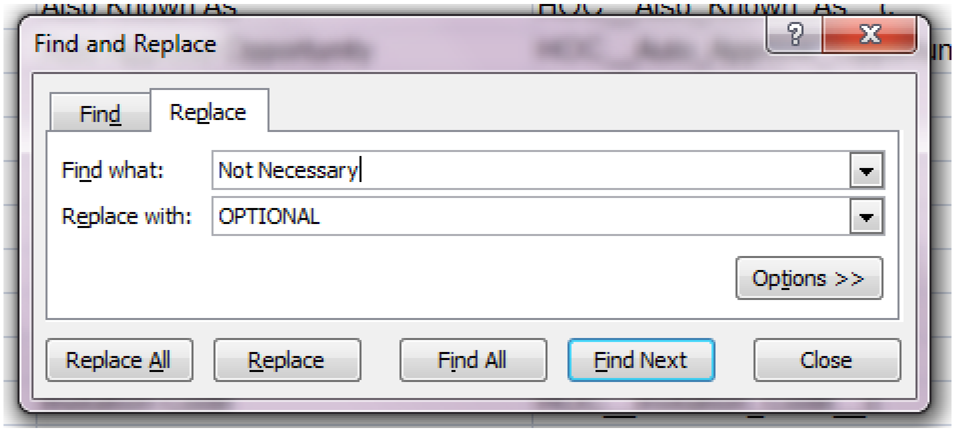






- Find & Replace. This allows you to find certain terms in the document and replace them with a new term. This is helpful for converting terminology in your system to match the terminology in HandsOn Connect.

    - In Excel 2003 & 2007- The easiest way to do a find and replace is to hit “CTRL- F”. This will bring up a window for you to enter the term you want to find.
    - You can also click on the “Replace” tab to enter a value to replace the found term with.
    - You can also highlight a specific Column or Row if you don’t want to change the value in the entire document, but just for a specific field. For example, if you want to the Impact Area for “Families” to “Family Services” you would want to highlight just the column for Impact Area; otherwise, it’ll find the term Families in the mission statement, organization name, etc. and replace those as well.
    - You will also be given options of “Replace,” “Replace All,” “Find Next,” or “Find All.” You can use the Find next and Replace options to be selective of the items that you replace in your tables.


Find and Replace
Find
Replace
Find what:
Not Necessary
Replace with:
OPTIONAL
Options >>
Replace All
Replace
Find All
Find Next
Close