

# Using the Volgistics Import Utility

A step-by-step guide on how to convert volunteer information you already have on your computer into Volgistics.



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# About the Volgistics Import Utility

Many volunteer programs already have some or all of their volunteer information stored in a computer file or database of one kind or another. The Import Utility provides these organizations with a way to move the information from their existing computer files into their Volgistics account, eliminating the need to re-enter some or all of their existing records.

- The Import Utility is a stand-alone Microsoft Windows program you run on your own computer to convert data from an existing volunteer database on your computer into your Volgistics account. The Import Utility requires Microsoft Windows 95 or later.
- The Import Utility connects to Volgistics over the Internet. It uses secure (SSL) network connections to protect the privacy of your information as it is converted into Volgistics. You must run the utility at a computer that has an Internet connection.
- You can use the Import Utility to import volunteer information from any tab or comma delimited text file. [Appendix C](#) (page 19) lists the fields of data which may be imported with the utility.
- You must have a trial or paid Volgistics account and provide your Volgistics account number, login name, and password to use the Import Utility. The Import Utility is freely available to organizations that use, or are considering, Volgistics.
- Volgistics provides the Import Utility for "do-it-yourself" data conversions. Volgistics can provide online technical support with the operation of the Import Utility and advice on general Volgistics data conversion questions. Users of the Import Utility are responsible for converting their existing data into tab or comma delimited files (if necessary), determining what information their current data files contain, and where this information should be converted to in Volgistics.
- The Import Utility is intended for one-time conversions of existing volunteer information into a Volgistics account. You cannot continue to update or add information to your original source file and then use the Import Utility to append the new or changed information in Volgistics. Once you convert your existing volunteer records into Volgistics, you should stop using your old program.
- We recommend that the person who uses the Import Utility have a basic understanding of database tables. Volunteer leaders may want to seek the assistance of an Information Services representative from their organization, or a qualified volunteer to assist with the conversion and use of the utility. An understanding of what information your existing volunteer database contains is also important. In some cases, a person familiar with database design should work in conjunction with a person familiar with the existing database to perform the conversion.

# Before You Convert

The key to a successful conversion is preparation. Time spent documenting your existing data file and deciding where each field will be converted to before you use the Import Utility will pay-off by eliminating or reducing the need for "re-runs." It also ensures that your converted data is as useful as possible in Volgistics.

You should follow these three steps to prepare for your conversion:

## 1. Save your existing volunteer records to a tab or comma delimited text file.

If you haven't already, you'll need to save the data files you want to convert as delimited text files. The Import Utility can read either comma or tab delimited text files (often known as "CSV" files). [Appendix A](#) (page 13) explains more about creating delimited text files.

Please note: If you will be using the Site Level Access feature in Volgistics, you will need to have separate files for each of the Sites you will be assigning volunteers to in your account. You can find more information on how the Site Level Access feature works in Volgistics by referring to Help topics [2035](#), [2036](#) and [2037](#) in the Volgistics help library.

## 2. Take an inventory of the fields in your current database.

Before you begin this step you should understand several basic concepts and terms used in this guide and the Import Utility.

### Source file

Your source file is the tab or comma delimited text computer file you will be converting from. You should know the file name of your source file(s), and what folder they are stored in on your computer.

At a minimum, your source file should include each volunteer's name and contact information. Although it may also contain other kinds of information such as personal information, life-time service hours, start and stop dates, and more. [Appendix C](#) (page 19) lists the fields of data that can be imported with the utility.

### Rows & Columns

Your source file is made up of rows and columns of information, much like a spread sheet. Each row of information in your source file contains one individual volunteer's record, and each column a specific kind – or field – of information. In the example below, the fields are "Last name," "First name," "M," "Street 1," and "City."

Last name	First name	M	Street 1	City
Andersen	Beverly	J	123 Elm Street	Bedford Falls
Appleton	Steve	D	2626 Second Street	South Haven

Using the form from [Appendix B](#) (page 15), record what kind of information each field – or column – in your source data contains.

**3. Decide which of your existing fields you want to transfer, and where you want each field from your existing data to appear in Volgistics.**

The best way to do this is to take the list of fields that your source file contains (Appendix B), login to Volgistics, open a volunteer record (create a new volunteer record if you need to), and then look for the location in the volunteer record where you want that field to end-up.

For example, if the first field (column) in your source file contains "Last name," you would see that the best place to put this information in Volgistics would be the "Last name" field. Note that the "Last name" field in Volgistics is located on the Core tab, and within the Name Box, as shown here:

The screenshot shows the Volgistics interface for a volunteer record titled "Appleton, Steve". At the top, there are eight tabs: Core, Profile, Service, Schedule, History, Contacts, Notes, and Vic. The "Core" tab is selected. Below the tabs is a row of buttons: Save, Cancel, Archive, Delete, Combine, Tagged (checkbox), Copy, New, Previous, and Next. Below this is a "Name" box containing several fields: Last name (Appleton), First name (Steve), Middle name (D.), Title (Mr.), Number (116), Status (Active), Type (Adult), and Kind (Individual). A "Field" label with an arrow points to the "Last name" field.

It is important to understand this Tab - Box - Field structure: Every field on a volunteer's record is located on one of the eight tabs shown above (i.e. Core, Profile, Service, Schedule, History, Contacts, Notes, or Vic) and on a specific "Box" on that tab. This structure is how the Import Utility knows exactly which field you are referring to when you tell it where you want your data to go.

Many fields in your Volgistics account have rules about the kind of information that go into them. These rules are designed to ensure that information you manage is useable. For example, Volgistics' "date" fields require that the data you import into in them are formatted as dates.

[Appendix C](#) (page 19) lists which fields have specific rules concerning the kind of information you can convert into them. You should consider this list of specialized fields as you choose where you want the data from your source file to appear in Volgistics.

# Using the Volgistics Import Utility

## Step 1: Connect

The import utility establishes a connection to the Volgistics system over the Internet. Therefore, you must run the import utility at a computer that has an active connection to the Internet.

Enter the account number, login name, and password of the Volgistics account you want to convert your data into, and then click the **Next** button.

If the conversion utility cannot locate an Internet connection, you will get an error message. In this case, check to make sure you are able to go to other Internet web sites. If you are, you may need to configure your Internet connection manually. Click the **Connection settings** button to do this. Refer to [Appendix F](#) (page 44) for more help.

If the Volgistics account credentials you entered are not correct, the program will report one of the following errors.

### The account number is not valid

This error appears if you enter a Volgistics account number that is not properly formatted. Account numbers are nine digits long and they optionally include hyphens (e.g. 123-456-789).

### The login name is not valid

This error appears if the login name you entered is not a properly formatted email address.

### The account number, login name, or password you entered is not correct

This error appears if you enter an invalid Volgistics account number, login name, or password. Verify that you have the correct account number, login name, and password; and that you have entered them correctly.

You must have a valid trial or paid account in order to use the Import Utility.

## Step 2: Choose File

Click the **Browse** button and then select the file that contains the data you want to import (the source file).

### First row contains column headings

Many data files include column headings on the first row of information. Check this box if the file you're importing contains column headings on the first row. Un-check this box if the first row of your file contains a volunteer record. When this box is checked, the Import Utility will not create a volunteer record in Volgistics for the first row of information in the source file.

Click the **Next** button once you have selected the source file.

### Step 3: Choose Fields

The Import Utility displays a sample of the information from your source file in the table in the *Source file sample* section at the top. (If your source file contains more than 100 records, this table will display just the first 100 records as a sample, however all the volunteer records in your source file will be converted once you start the conversion.)

Follow the steps below to specify the location in Volgistics where each column (field) of information from your source file should be converted to:

#### 1. Select a column you want imported into Volgistics.

Click on a column in the *Source file sample* section at the top of the screen.

**Step 3: Choose Fields**

Source file sample

Choose a column from your source file

QuickTutorial

Click on a column to select that field to import

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Last name	First name	Mi	Title	Status	Type	Street 1	Street 2	City	State	Zip	Home Phone	Work Phone	Cell Phone	Email Ad
2	Anderson	Beverly	J.	Mrs.	Active	Adult	123 Elm Street		Bedford Falls	MI	43529	616-987-2231	616-984-2210	616-220-8885	bandersc
3	Appleton	Steve	D.	Mr.	Active	Adult	2626 Second Street		South Haven	MI	43987	231-442-9875	616-985-2228	231-330-9987	applema
4	Beavers	Arnold	K.	Mr.	Inactive	Adult	71 Lloyd Avenue	Apt. 3-C	Bedford Falls	MI	43529	616-887-3390	616-880-3300	616-889-0009	beavers
5	Beavers	Malcolm		Mr.	Active	Junior	887 Amhurst Blvd.	Apt. 8	Bedford Falls	MI	43529	616-984-3301			beaversn
6	Beavers	Samantha	S.	Ms.	Active	Adult	887 Amhurst Blvd.	Apt. 8	Bedford Falls	MI	43529	616-984-3301	616-880-7652	616-888-3098	sbeavers

#### 2. Choose to import this field, or ignore it.

In the *What to do with Column ...* section, select "Skip column *n*" for any column in your source data that you do not want to convert to Volgistics. The Import Utility will ignore the information in the selected column. If you select to ignore the column, return to step 1 and click on the next column of information in your source file.

Select "Convert column *n* to..." for each field in your source file you want to convert to Volgistics. Then proceed to step 3.

#### 3. Choose the Tab, Box and Field you want the data transferred to

Use the *Tab*, *Box*, and *Field* boxes to specify where the information from the selected column should appear in Volgistics.

The thumbnail image to the right of the boxes will change when new selections are made in the *Tab* box. Click on the thumbnail image to see a larger image of what the tab looks like in Volgistics. When you're done viewing the larger image, click the "X" in the upper right corner of the window to close it.

If you created a table in [Appendix B](#) (page 15), you can use this as your guide. For example, if the first column in your source file contains the "Last name" field, the *Tab*, *Box*, and *Field* you should convert this information to in Volgistics is the Core *tab*, Name *box*, and "Last name" *field* as shown in this illustration:

The screenshot shows the Volgistics interface for a record titled "Appleton, Steve". At the top, there are several tabs: Core, Profile, Service, Schedule, History, Contacts, Notes, and Vic. The "Core" tab is currently selected. Below the tabs is a toolbar with buttons for Save, Cancel, Archive, Delete, Combine, Tagged, Copy, New, Previous, and Next. The main area is titled "Name" and contains several input fields and dropdown menus. The "Last name" field is filled with "Appleton", "First name" with "Steve", "Middle name" with "D.", and "Nickname" is empty. On the right side, "Number" is "116", "Status" is "Active", "Type" is "Adult", and "Kind" is "Individual" (selected with a radio button). Labels "Tab", "Box", and "Field" with arrows point to the "Core" tab, the "Name" box, and the "Last name" field respectively.

Be careful not to choose the same field in Volgistics for two different columns of information. For example, if the "Work phone" column and the "Cell phone" column of your source file are both directed to the "Work phone" field in Volgistics, only the first column's information will be kept.

The exception to this is the Flags field in Volgistics. You can select to direct more than one column of information to this field. For more information on how this works, please see the [Core Tab Considerations](#) (page 24) section in Appendix C.

### Field Type

Once you select a field, this space displays the Volgistics field type for the selected field. Use this to verify that the type of field you have selected is consistent with the type of information the current source file column contains. For example, if the source file column currently selected contains dates, the field you choose to convert that column to in Volgistics should be a Date type field. You may need to setup fields with certain field types in your Volgistics account to accommodate your source data before starting the conversion. [Appendix C](#) (page 19) includes more information about Volgistics field types.

### Date format

If a column from your source data file is to be converted to a Volgistics Date field, use this dropdown list to indicate how the dates are *currently formatted in the source data*.

Date fields in your source file may contain any one of many different date formats. This is acceptable as long as all of the dates in a given field (column) are formatted the same way. Different date columns in your source file may be formatted differently, as long as all of the dates in a given column are formatted consistently. Information on each of the date format options can be found in [Appendix G](#) (page 47).

If you're working with a source file column that contains dates with inconsistent formatting, you can either cancel the conversion and edit the source file to correct the date formatting irregularities, or choose the date format most commonly used in the selected source file column.

Any dates in the source file that are formatted differently than the date format you choose will not be converted. You would need to manually enter the dates for these records after the conversion is completed.

#### 4. Repeat steps 1-3 for each column (field) of data, then click "Next" to finish.

You will need to go back to step one for each column of information in your source file. For example, if column A contains the volunteers' last names and column B contains the volunteers' first names, after column A is directed to the "Last name" field click on column B and follow the steps to direct it to the "First name" field. This must be done for each column you want to import in the source file before you click the **Next** button. If you need assistance, click the **Quick Tutorial** button. To close the tutorial and continue, click the **Close Tutorial** button.

You can go back to review previous field selections for any column in your source file by clicking once on the desired column in the source file table.

Click the **Prev** button if you need to return to the *Choose File* screen.

## Step 4: Test Run

This step shows you how your source data will appear when it is converted into Volgistics by displaying the name of the Volgistics field you have selected as the destination for each source file column and the data from the source volunteer record that will be inserted into each field.

### Step 4: Test Run

Test as many records as you would like.

When you are satisfied with your tests click "Next" to begin importing. Click "Prev" to go back and make changes before importing.

Test the next record

<b>Last name:</b> Anderson
<b>First name:</b> Beverly
<b>Middle name:</b> J.
<b>Title:</b> Mrs.
<b>Status:</b> Active
<b>Type:</b> Adult
<b>Street 1:</b> 123 Elm Street
<b>Street 2:</b>
<b>City:</b> Bedford Falls
<b>State:</b> MI
<b>Zip:</b> 43529
<b>Home Phone:</b> 616-987-2231
<b>Work Phone:</b> 616-984-2210
<b>Cell Phone:</b> 616-220-8885
<b>Email:</b> banderson@hatmail.com

Click the **Test the next record** button to proceed to the next record.

The Import Utility does not actually convert any information during the test. The test is simply a way for you to see the actual source data and which fields it will appear in once it is converted (given your current selections).

You do not need to test every record in your source file. Test only as many records as necessary for you to determine that the destination fields you have selected in Volgistics make sense.

If you are satisfied that the data in the records you test is destined for the appropriate fields in Volgistics, click the **Next** button to continue.

If you see data in your test that appears to be destined for an inappropriate field in Volgistics, click the **Prev** button to go back and change your Volgistics field selections. Or click the **Cancel** button to close the Import Utility if you need to edit your source file before running the conversion.

## Step 5: Site

If your Volgistics account already includes multiple Sites, the Import Utility asks you if you want to convert the data from your source file to a specific Site in Volgistics. If the Import Utility does not ask you to choose a Site, simply continue to Step 6 (your Volgistics account only has one Site).

Please note: In order to associate volunteer records to a Site, you will need to have Site Level Access turned on in your account before the import occurs. If you need help on how to do this, you can find out more in [Help topic 2036](#) in the Volgistics help library. You might find Help topics [2035](#) and [2037](#) useful also. If you have not turned on Site Level Access in your Volgistics account, but wish to use this feature, click the **Cancel** button to close the utility. Setup your account so Site Level Access is turned on, and then restart the import process.

If you are converting multiple source files into one Volgistics account, and you want the volunteer records from each of your source files to fall under separate Volgistics Sites, follow these steps:

1. Choose "The records I'm importing all belong to this site."
2. Select the Site you want the volunteer records from the source file to be associated with.
3. Click the **Next** button.

If you are converting a single source file and you do not want its volunteer records to "belong" to a single Site in Volgistics:

1. Choose "The records I'm importing do not belong to any single site."
2. Click the **Next** button.

## Step 6: Import

Click the **Start** button to begin converting the volunteer data from your source file into your Volgistics account.

The Import Utility will log any irregularities it finds in the source data on this screen. This import log is for your own information, and most of the items you're likely to see reported here will relate to irregularities in the source data. Many of these irregularities will not adversely affect your ability to use the converted data. If you need help changing field settings in Volgistics to address an irregularity, you may find Help topics [2017](#) and [2018](#) in the Volgistics help library helpful.

The Import Utility will run until all of the records in your source file have been converted. The length of time required for the conversion to finish will depend upon factors such as the number of records you are converting, the number of fields you're converting and the speed of your Internet connection. If the Import Utility seems to "hang" for an abnormally long amount of time, it may be a problem with your source file's formatting. In this case, please refer to [Appendix H](#) (page 50) for help if this occurs.

When the Import Utility is finished it displays an "Import finished" message. When this appears click the **Next** button to continue. Then click the **Close** button to close the Import Utility.

## Step 7: Receive Your Converted Data

The volunteer records you convert into Volgistics initially appear on the Applications tab in your Volgistics mailbox. From here you can choose to receive some, or all, of the converted volunteer records into your Volgistics database.

If you selected to have the records directed to particular Site in step 5 of the import process, the records will still need to be received by a headquarters level operator. A headquarters level operator is an operator whose System Operator page is setup to allow access to "All Sites." Site Level Operators (those assigned to just one particular Site) will not see the applications on the Applications tab. The records will need to be received by a headquarters level operator first in order for them to be available to Site Level Operators.

To receive your converted records:

1. Login to Volgistics.
2. Choose Mailbox from the Menu.
3. Click on the Applications tab. The Applications tab is where your Volgistics account receives volunteer data submitted to the system electronically, such as converted data as well as newly submitted online volunteer application forms (this is why the tab is called the Applications tab).
4. If you want to receive all of the converted volunteer records, click the **Check all** button located near the bottom of the Applications tab. If want to receive only some of the converted records, place a check mark next to the name of each volunteer record you want to receive.
5. Click the **Receive** button located near the bottom of the Applications tab to move the selected volunteer records into your database.

Remember, if you are converting multiple source files into one Volgistics account and using Site Level Access, you will need to complete the conversion process for each source file.

Your Volgistics account's service level determines the number of volunteer records you can enter into Volgistics. If there is not enough space in your account to receive all of the volunteer records you want to convert, you can:

- Choose to convert only as many records as you currently have space for.
- Increase your account's service level to provide space for tracking more volunteers. You can find help on how to do this in [Help topic 2166](#) in the Volgistics help library.
- Delete any unneeded volunteer records that are already in your account to create more room to receive records. You can find help on how to do this in [Help topic 2309](#) in the Volgistics help library.

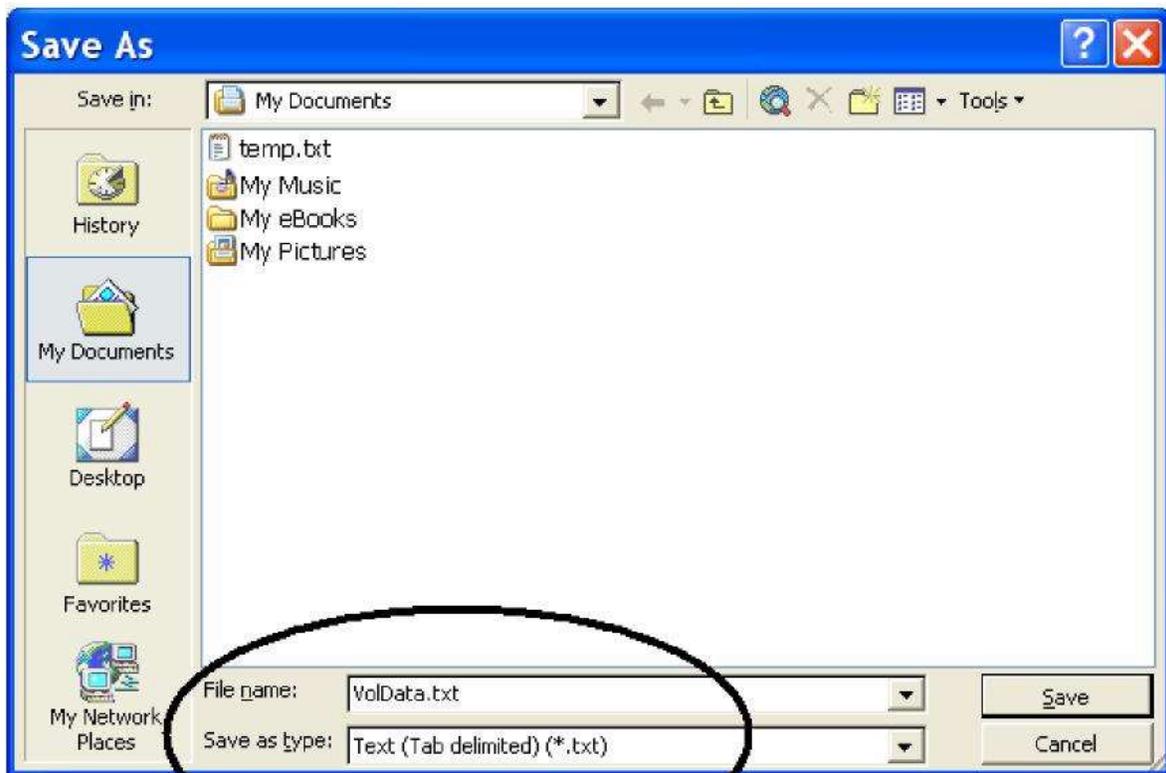
Once all source files have been received, you are now ready to begin working with your imported information. You may find [Help topic 2323](#) in the Volgistics help library useful at this point.

## Appendix A - Creating Delimited Text Files

The import utility can read comma or tab delimited text files. If the volunteer database files you want to convert are not already in one of these formats, you must save them as delimited text files before you can convert them with the Import Utility.

Most database programs like Access, and spreadsheet programs like Excel, provide tools for saving tables as delimited text files. The step-by-step procedure for saving tables as delimited text files may vary, depending on the specific program, and version of the program, you use. However, the steps are likely to be similar to these instructions for saving an Excel table as delimited text:

1. Open the table that contains your existing volunteer data in Excel.
2. Select the File menu, and then select "Save As..."
3. In the "Save As" window, enter a file name (such as *VolunteerData.txt*) for your file, and then choose *Text (Tab Delimited) (\*.TXT)* in the "Save as Type field," as shown in the following illustration. (Note: the file types *Text (comma separated) (\*.CSV)* or *CSV (Comma delimited) (\*.csv)* will also work). It does not matter what you name the file, or what file name extension you use, as long as you remember what the file name is.



4. Make a note of the file name you entered, and the name of the folder you're saving the file in. In the illustration shown after step 3, the file name is *VolData.txt* and it's being saved in the folder *My Documents*.
5. Click the **Save** button.

You've now saved your volunteer data in a tab delimited file, which the Import Utility can convert into Volgistics.

### Moving other kinds of data to delimited text files

If your volunteer data is currently in a custom volunteer database, it may be necessary for you to "export" it. Most programs offer some form of export capability that creates delimited text files, or the ability to produce spreadsheet outputs that contain your data. If you can export your data to a spreadsheet format, you can then save it as a delimited text file using a spreadsheet program such as Excel as shown.

If your volunteer data is currently in the VolunteerWorks program, Volgistics offers an integrated tool for converting into Volgistics. Additional information about converting from VolunteerWorks is available on the Volgistics web site at <http://www.volgistics.com/VolunteerWorks.htm>.

### Delimited text file formats

The Import Utility accepts data in either tab or comma delimited text file formats. Files must have the following characteristics:

- Fields are separated by a comma or a tab character.
- Each record may have up to 256 fields.
- Each record is terminated by a carriage return and line feed character. In other words, each record starts on a new row.
- Fields may optionally be enclosed in quotes. With comma delimited files, fields must be enclosed in quotes if they contain imbedded commas.
- Fields may be in any order, as long as every record has the *same* field order. For example, if the third field in the first record contains a street address (as shown in the examples below), then the third field in *every* record must contain the street address.

Examples of comma delimited files:

```
Bailey,George,123 Sycamore Street,Bedford Falls,IN<CR><LF>
Carson,Betty, "456 Elm Street, Apt 2",Bedford Falls,IN,12345<CR><LF>
```

Examples of tab delimited files:

```
Bailey<tab>George<tab>123 Sycamore Street<tab>Bedford Falls<tab>IN<tab>12345<CR><LF>
Carson<tab>Betty<tab>456 Elm Street, Apt 2<tab>Bedford Falls<tab>IN<tab>12345<CR><LF>
```

## Appendix B - Data Conversion Table

Column	What this column contains in your source file	Do you want to convert this column? (yes or no)	Where you want this information in Volgistics
A (1)			Tab: Box: Field
B (2)			Tab: Box: Field
C (3)			Tab: Box: Field
D (4)			Tab: Box: Field
E (5)			Tab: Box: Field
F (6)			Tab: Box: Field
G (7)			Tab: Box: Field
H (8)			Tab: Box: Field
I (9)			Tab: Box: Field
J (10)			Tab: Box: Field
K (11)			Tab: Box: Field
L (12)			Tab: Box: Field
M (13)			Tab: Box: Field

## Appendix B (continued)

Column	What this column contains in your source file	Do you want to convert this column? (yes or no)	Where you want this information in Volgistics
N (14)			Tab: Box: Field
O (15)			Tab: Box: Field
P (16)			Tab: Box: Field
Q (17)			Tab: Box: Field
R (18)			Tab: Box: Field
S (19)			Tab: Box: Field
T (20)			Tab: Box: Field
U (21)			Tab: Box: Field
V (22)			Tab: Box: Field
W (23)			Tab: Box: Field
X (24)			Tab: Box: Field
Y (25)			Tab: Box: Field
Z (26)			Tab: Box: Field

## Appendix B (continued)

Column	What this column contains in your source file	Do you want to convert this column? (yes or no)	Where you want this information in Volgistics
AA (27)			Tab: Box: Field
AB (28)			Tab: Box: Field
AC (29)			Tab: Box: Field
AD (30)			Tab: Box: Field
AE (31)			Tab: Box: Field
AF (32)			Tab: Box: Field
AG (33)			Tab: Box: Field
AH (34)			Tab: Box: Field
AI (35)			Tab: Box: Field
AJ (36)			Tab: Box: Field
AK (37)			Tab: Box: Field
AL (38)			Tab: Box: Field
AM (39)			Tab: Box: Field

## Appendix B (continued)

Column	What this column contains in your source file	Do you want to convert this column? (yes or no)	Where you want this information in Volgistics
AN (40)			Tab: Box: Field
AO (41)			Tab: Box: Field
AP (42)			Tab: Box: Field
AQ (43)			Tab: Box: Field
AR (44)			Tab: Box: Field
AS (45)			Tab: Box: Field
AT (46)			Tab: Box: Field
AU (47)			Tab: Box: Field
AV (48)			Tab: Box: Field
AW (49)			Tab: Box: Field:
AX (50)			Tab: Box: Field
AY (51)			Tab: Box: Field
AZ (52)			Tab: Box: Field

## Appendix C - Fields You Can Import

Many fields in Volgistics are dropdown tables and your source file's data may have an impact on these. A dropdown table may be prepopulated with some entries already in Volgistics such as the Title and Status fields. Or, your choices during the Getting Started interview, or customization afterward, may have created entries such as with the Flags and Type fields.

When entries already exist in a table, if the source file's data matches exactly, the entries are kept as they are. However, if the source file's data does not match exactly, a new entry is created in the table. For example, the Title field dropdown table comes prepopulated with "Dr.," "Mr.," "Mrs.," and "Ms." If your source file's data has "Ms." it will not change the table's entries because it matches an entry exactly. However, if your source file's data has "Miss" or "Ms" it will create new entries for these in the dropdown table for the Title field. If unneeded entries are created by accident during the import process, [Help topic 2018](#) in the Volgistics help library has information on how to correct these.

You can use the Import Utility to convert the basic volunteer data fields listed below. While Volgistics provides many additional fields for your volunteer records, data cannot be imported into these additional fields through the Import Utility. In this case, you should consider the Volgistics [Jump-Start Service](#) for more complex source data file conversions.

### Core Tab

#### Name box

Last name (text)  
First name (text)  
Middle name (text)  
Title (dropdown)  
Nickname (text)  
Number (positive number)  
Status (dropdown)  
Type (dropdown)

#### Address box

Street 1 (text)  
Street 2 (text)  
Street 3 (text)  
City (text)  
State (dropdown)  
Zip (zip or post code)  
No postal mail (true or false)  
Home Phone (phone number)  
Ok to call Home (true or false)  
Work Phone (phone number)  
Ok to call Work (true or false)  
Cell Phone (phone number)

Ok to call Cell (true or false)  
Fax Phone (phone number)  
Ok to call Fax (true or false)  
Pager Phone (phone number)  
Ok to call Pager (true or false)  
Other Phone (phone number)  
Ok to call Other (true or false)  
Email (text)  
Web site (text)

### Flags box

Flags (dropdown)\*

\*See the [Core Tab Considerations](#) (page 24) section below for more information on Flags.

### Portal Access\*\*

Password (text)

\*\*Portal Access is not an actual box on the Core tab because the Password field is hidden. This field allows you to import a password that the volunteer will use to access the VicNet module. You can find out more about the VicNet module in [Help topic 3020](#) in the Volgistics help library.

## **Profile Tab**

### Personal box

Date of birth (date)  
Age (age)

Spare dropdown 1<sup>†</sup> (dropdown)  
Spare dropdown 2<sup>†</sup> (dropdown)  
Spare dropdown 3<sup>†</sup> (dropdown)  
Spare dropdown 4<sup>†</sup> (dropdown)  
Spare dropdown 5<sup>†</sup> (dropdown)  
Spare dropdown 6<sup>†</sup> (dropdown)

Spare field 1<sup>†</sup> (depends on field properties)  
Spare field 2<sup>†</sup> (depends on field properties)  
Spare field 3<sup>†</sup> (depends on field properties)  
Spare field 4<sup>†</sup> (depends on field properties)  
Spare field 5<sup>†</sup> (depends on field properties)  
Spare field 6<sup>†</sup> (depends on field properties)

Spare checkbox 1<sup>†</sup> (true or false)  
Spare checkbox 2<sup>†</sup> (true or false)  
Spare checkbox 3<sup>†</sup> (true or false)

Spare checkbox 4<sup>†</sup> (true or false)  
Spare checkbox 5<sup>†</sup> (true or false)  
Spare checkbox 6<sup>†</sup> (true or false)

<sup>†</sup>If spare fields have been setup during the Getting Started interview, or you have customized these already in your account, you will see the name given to the field in the Field box. For example, if you setup a Gender field during the interview, one of the spare dropdown fields will appear as "Gender" in the Field box.

#### Email Preference box\*

Electronic newsletters (true or false)  
Recruitment appeals (true or false)  
Checklist reminders (true or false)

\*By default each new account contains preferences for the types of emails shown above. If you have setup Schedule reminder messages to be sent, you will also see this field. [Help topic 2273](#) in the Volgistics help library explains how to setup schedule reminder messages.

If you have customized new types, or changed the default types, the fields you see in the Field box will reflect these changes. [Help topic 1023](#) in the Volgistics help library explains more about how to change or customize email types.

#### Availability box

My availability is (dropdown)  
From (date)  
to (date)  
I would like to serve up to (positive number)  
hours (dropdown)

#### **Service tab**

##### Service box

Life hours (dropdown)

#### **Schedule tab**

*There are not any fields that can be imported to the Schedule tab using the Import Utility program.*

## History tab

### Dates box\*

Date active (date)  
Date inactive (date)

\*If you have created other types of date records that will appear on the History tab of the volunteer record, you will also see these listed in the Fields box when you perform the import. For example, Checklist items or Awards may appear here if you have already created these in your Volgistics account. However, there is not a way to import information from your source file to these additional fields with the Import Utility program.

## Contacts tab

### Emergency Contacts box

Emergency contact Relationship (dropdown)  
Emergency contact Last name (text)  
Emergency contact First name (text)  
Emergency contact Middle name (text)  
Emergency contact Nickname (text)  
Emergency contact Title (dropdown)  
Emergency contact Street 1 (text)  
Emergency contact Street 2 (text)  
Emergency contact Street 3 (text)  
Emergency contact City (text)  
Emergency contact State (dropdown)  
Emergency contact Zip (zip or post code)  
Emergency contact Home Phone (phone number)  
Emergency contact Ok to call Home (true or false)  
Emergency contact Work Phone (phone number)  
Emergency contact Ok to call Work (true or false)  
Emergency contact Cell Phone (phone number)  
Emergency contact Ok to call Cell (true or false)  
Emergency contact Fax Phone (phone number)  
Emergency contact Ok to call Fax (true or false)  
Emergency contact Pager Phone (phone number)  
Emergency contact Ok to call Pager (true or false)  
Emergency contact Other Phone (phone number)  
Emergency contact Ok to call Other (true or false)  
Emergency contact Email (text)  
Emergency contact Contacted (dropdown)  
Emergency contact Verified (date)  
Emergency contact Spare date (date)  
Emergency contact Web site (text)

## **Notes tab**

Notes box

Notes (text)

## **Vic tab**

*There are not any fields that can be imported to the Vic tab using the Import Utility program. You can, however, import a password that will be used to access the VicNet portal. You can find more information on this under the [Core tab heading](#) on page 20.*

## Core Tab Considerations

The information below may be useful when you import information to the Core tab of the Volgistics record. If you need more information on a field or setting, please see [Help topic 2294](#) in the Volgistics help library.

The screenshot shows the 'Core' tab for a record named 'Appleton, Steve'. The interface includes a navigation bar with tabs for Core, Profile, Service, Schedule, History, Contacts, Notes, and Vic. Below the tabs are buttons for Save, Cancel, Archive, Delete, Combine, Tagged, Copy, New, Previous, and Next. The 'Tagged' field is highlighted with a callout '1'. The 'Name' section contains fields for Last name (Appleton), First name (Steve), Middle name (D.), Title (Mr.), Nickname, Number (116), Status (Active), Type (Adult), and Kind (Individual/Group). The 'Address' section includes Street 1-3, City, State, Zip, Home, Work, Cell, Fax, Pager, Other, Mail (No postal mail/No email), Email, and Web site. The 'Flags' section has a Flag field and a Save button. The 'Sites' section has a Site field and a Save button. The 'Statistics' section shows Life, YTD, and MTD hours, with a callout '11' pointing to the MTD field. The MTD field shows 0:00. The YTD field shows 100:00. The Life field shows 100:00. The Statistics section also displays 'Years of service: 8 months' and 'Date of last activity: 01-01-2012'.

1. You cannot import data into the Tagged field; however each record you import will appear tagged after you run the conversion so you can easily locate the imported records in your database. Tags are used to temporarily identify groups of volunteer records. They are a useful way to perform operations an entire group of volunteer records at once. Help topics [2136](#) and [2137](#) in the Volgistics help library explain more about the tags feature.

2. Although you are not required to use volunteer numbers in Volgistics, you can if you choose to. If you do not use volunteer numbers you can hide the Number field.

You can optionally import volunteer numbers as part of your volunteer records, as long as every record you import has a unique number. If you import volunteer numbers, and there is already a record in Volgistics with the same volunteer number, the Import Utility will give that record a new, unique number; unless the existing volunteer record in Volgistics has the exact same first and last name. If an existing record in your Volgistics database has the same record number, and the same first and last name as a record you are attempting to import, the Import Utility will view it as a duplicate and it will not be imported.

If you do not import volunteer record numbers, Volgistics assigns a unique volunteer number to every volunteer record automatically. Help topics [2152](#) and [2247](#) in the Volgistics help library explain more about the Number field.

3. Every volunteer record in Volgistics must have a volunteer status (e.g. Active, Inactive, Applicant, etc.). If your source data does not contain a Status field (or if you choose not to import it), each record you import will be given the Active Status. [Help topic 2014](#) in the Volgistics help library explains more about how the Status field is used in Volgistics.

Your Volgistics account may have up to eight status values. By default your account has these status values (although you may change these under Field Options):

- Active
- Applicant
- Inactive
- Prospect

Volgistics can only have eight different status choices, so if you have more than eight codes in your source data, you must reduce these to no more than eight.

Your source data may contain status codes that have the same meaning but a different notation than the status values established in Volgistics. For example, the Status field in your source data might contain "A" for Active and "I" for Inactive. In this case you can either:

- a) Use a program such as Microsoft Excel to *find and replace* your values with the appropriate Status names from Volgistics. For instance, find and replace all of the "A" values in the Status field with the word "Active." If you use Excel to make such a change in your source data, use caution to find and replace only the values in the column that contains your Status field. [Appendix D](#) (page 38) has more information on how to do this.

- b) Convert your existing status values as they are, and then use Volgistics to merge the appropriate status values together after the conversion. For example, merge all of the "A" values into "Active." This technique will work as long the total number of different status values in your source data, plus the number of different status values already set in your Volgistics account, do not exceed eight (because you cannot have more than eight different status values in Volgistics). [Help topic 2018](#) in the Volgistics help library has more information on how to merge two values together.

4. The Type field is used as a way to categorize volunteer records. Each record can only have one Type, such as Adult, Junior, Student, Employee, etc. If a record can have more than one choice simultaneously, the Flags field should be used instead of the Type field. [Help topic 2263](#) in the Volgistics help library explains more about how to use this field.
5. The "Ok to call" checkboxes will default to checked for any phone number field you import a phone number to. If you import this value from your source data, it will be checked only if your source data includes a value of "True," "Yes," or "Y." The field will also appear as checked if you have it setup to be checked by default and your source file has a blank (empty) entry for the record. In order for the "Ok to call" checkbox not to be checked, your source data must include a value of "False," "No," "N," or some other non-standard value.
6. Your source data must conform to the type of phone number formatting you set for your Volgistics database. For example, if you set your Volgistics database to require a three digit area code and seven digit phone number for the Home phone number field, only phone numbers that contain all ten digits will be imported for this field. Or, if you setup for the area code to be optional, but the seven digits to be required, phone numbers with either seven or ten digits will be imported. Phone numbers that contain a different number of digits than your setup requires will be dropped and you will receive a notification of this in the import log. You set phone number formatting rules for your account under "Field Options" in Setup.
7. Your source data must conform to the type of zip or postal code formatting you set for your Volgistics database. For example, if your account is set for US or Canadian formatting (this is the default in a trial account), then the field must have either 5 or 9 digits for United States zip codes, or 6 characters arranged in letter-digit-letter-digit-letter-digit format for Canadian postal codes. Values in the source data that do not meet the formatting requirements will not be imported and you will receive a notification of this in the import log. You set zip or postal code formatting rules for your account under "Field Options" in Setup.
8. Your source data must conform to standard email address formatting. This requires that there is information for a user name, the "at" symbol (@), and a domain. For example, user@domain.com, user@domain.ca, and user@domain.k12.us.edu are all valid and will be imported. However, user@domain and user.com will not be imported because they are not complete.
9. There is no practical limit to the number of different flags you can create in your account. Each individual volunteer may have up to thirty-six different flags.

When you convert data into the Flag field, the Import Utility inserts the actual values that appear in the source data as the Flag. Often, the source field will contain a true/false value or a code number rather than a meaningful word or phrase. In this case you should use the *find and replace* technique to change the original source file data to the actual Flag value you want to appear in Volgistics. [Appendix D](#) (page 38) shows how to use this technique.

The Flags field is the only field where you can direct more than one column of information in your source file to just one Volgistics field during the import process. For example, if you have flags setup for Weekends, Finance Committee and CPR Certified, your source file should look something like the example shown at the top of page 27.

Last Name	First Name	Status	Weekends	Finance Committee	CPR Certified
Anderson	Beverly	Active		Finance Committee	
Appleton	Steve	Active	Weekends		CPR Certified
Beavers	Arnold	Inactive	Weekends		
Carlson	Virginia	Prospect			

During step 3 of the import process, you would select the Core tab, the Flags box and the Flags field for all three columns with flag information. The result will be that the dropdown table for the Flags field has entries for Weekends, Finance Committee and CPR Certified. The volunteer record created for Beverly Anderson will have a Finance Committee flag, the record for Steve Appleton will have flags for Weekends and CPR Certified, and so on.

**10.** The Sites box will only show on the volunteer's record if you have Site Level Access turned on in your account. If you associated the volunteer record with a specific Site during step 5 of the import process, that Site will be shown here. [Help topic 2036](#) in the Volgistics help library shows how to turn on Site Level Access in your account. You might find Help topics [2035](#) and [2037](#) useful also if you need to learn more about Site Level Access.

**11.** The Statistics box is display only. You do not convert (or enter) data into this box directly. However, it will automatically display each volunteer's statistics based on start and stop dates you import onto the History tab and the life hours you import onto the Service tab. See the [History Tab Considerations](#) (page 33) and the [Service Tab Considerations](#) (page 31) sections of this appendix for more information on these fields.

## Profile Tab Considerations

This view of the Profile tab has the Photo field hidden. If the Photo field is not hidden in your account currently, your view will be different. [Help topic 1033](#) in the Volgistics help library explains more about changing the hidden setting, and using the Photo field. It is not possible to convert volunteer photos with the free Import Utility.

The relative placement of the fields described will be similar to this view. By default, unused spare fields will not appear unless the "Hidden" setting has been changed to "No." [Help topic 2017](#) in the Volgistics help library explains how to do this.

The screenshot shows the profile page for Steve Appleton. The tabs at the top are Core, Profile (selected), Service, Schedule, History, Contacts, Notes, and Vic. Below the tabs are buttons for Save, Cancel, Tagged, New, Previous, and Next. The main content area is divided into sections: Personal, Email Preferences, Availability, and Assignment Preference. Numbered callouts point to specific fields: 1 points to the Date of birth field; 2 points to the Age field; 3 points to the Spare dropdown 2 field; 4 points to the Spare field 2 field; 5 points to the Uniform issued checkbox; 6 points to the Schedule reminders checkbox; 7 points to the My availability is dropdown; and 8 points to the Assignment Preference section.

**Appleton, Steve**

Core Profile Service Schedule History Contacts Notes Vic

Save Cancel Tagged 1 2 New Previous Next

**Personal**

Date of birth: 1 Age: 2 Omit from birthday lists

Gender: [dropdown] School: [text]

Spare dropdown 2: [dropdown] Spare field 2: [text]

3 Spare dropdown 3: [dropdown] Spare field 3: [text]

Spare dropdown 4: [dropdown] Spare field 4: [text]

Spare dropdown 5: [dropdown] Spare field 5: [text]

Spare dropdown 6: [dropdown] Spare field 6: [text]

4

5  Uniform issued  Spare checkbox 2

Spare checkbox 3  Spare checkbox 4

Spare checkbox 5  Spare checkbox 6

**Email Preferences** ⓘ

6  Schedule reminders  Electronic newsletters

Recruitment appeals

**Availability**

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Morning:	<input type="checkbox"/>						
Afternoon:	<input type="checkbox"/>						
Evening:	<input type="checkbox"/>						

7 My availability is: [dropdown]

From: [calendar] to: [calendar]

I would like to serve up to: 0 hours [dropdown]

**Assignment Preference** 8

1. You may import dates of birth with or without a year value. See [Appendix G](#) (page 47) for

more information.

2. You may import the volunteer's age as any positive number. However, if you provide a date of birth with a year, Volgistics will automatically calculate the value for the age field and update it automatically each year when the volunteer's birthday occurs. [Help topic 2212](#) in the Volgistics help library explains more.

Please note: If you convert the date of birth field with a year and also convert an age field that is incorrect, Volgistics will replace the incorrect age with the correct calculation based on the current year.

3. You may import data into any of the six spare dropdown fields. In the page view shown, "Spare dropdown 1" has been renamed "Gender." When you direct data from a column of information in your source file to a field, it automatically un-hides that field, but you will still need to rename it. [Help topic 2017](#) in the Volgistics help library explains how to do this.
4. There are six spare fields available for you to use. In the page view shown, "Spare field 1" has been renamed "School." When you direct data from a column of information in your source file to a field, it automatically un-hides that field, but you will still need to rename it.

You may customize these fields to only accept data if it is in a certain format. The default format is text, which will not require the data to meet any particular format to be in the field. Formats available are:

- Text
- Date
- Number (whole)
- Number (1 decimal place)
- Number (2 decimal places)
- Currency
- Social Security Number

[Help topic 2017](#) in the Volgistics help library explains how to un-hide and customize these fields.

5. You may import data into any of the six spare checkbox fields. In the page view shown, "Spare checkbox 1" has been renamed "Uniform issued." When you direct data from a column of information in your source file to a field, it automatically un-hides that field, but you will still need to rename it. [Help topic 2017](#) in the Volgistics help library explains how to do this.

Your source data must contain either "True/False," "Yes/No," or "Y/N" values (not case sensitive) for this field. "True," "Yes" and "Y" values will cause the checkbox to be checked on the record. "False," "No," "N," blank (empty) and any other values will cause the checkbox not to be checked on the record.

6. Email preferences are used in Volgistics to allow volunteers to select what types of email messages they want to receive. Trial accounts come with four types of messages (Schedule reminders, Checklist reminders, Electronic newsletters and Recruitment appeals) by default. If you have not setup a Checklist item with an automatic email message in your account yet, the volunteer's Profile tab will appear as shown in the screenshot above with the "Checklist reminder" preference hidden. You can find more information on Checklist items in Help

topics [2238](#) and [2240](#) in the Volgistics help library.

Your source data must contain either "True/False," "Yes/No," or "Y/N" values (not case sensitive) for this field. "True," "Yes" and "Y" values will cause the checkbox to be checked on the record. "False," "No," "N," and any non-standard values will cause the checkbox not to be checked on the record.

For accuracy, we recommend that you do not leave blank, or empty, entries when you're importing information to the email preference fields. This is because a blank (empty) entry for a record still causes the preference field to be checked on the volunteer's record if the email preference field is set to be checked by default. You can find information on controlling whether a preference field is checked by default, and creating new email preference fields, in [Help topic 1023](#) in the Volgistics help library.

7. You can import information into most of the fields in the Availability box to help track when volunteers are able to serve. However, it is not possible to import information into the checkboxes under the days of the week for the time of day availability. This information would need to be entered manually after the import is complete.
8. The remaining Profile tab fields cannot have information imported to them using the free Import Utility.

## Service Tab Considerations

Appleton, Steve

Core Profile **Service** Schedule History Contacts Notes Vic

Tagged New Previous Next

### Assignments i

**Add**

Assignment:  ▼

Role: Assigned ▼

From:  [Calendar] To:  [Calendar]

Save Cancel

---

**Matches** i

Good  Fair  Marginal Refresh

---

### Service Expand all

Date	Assignment	Hours
<a href="#">Jan 2012</a>		100:00
Life total:		100:00

**Add**

Assignment:  ▼

Date:  [Calendar]

Hours:

Save Cancel

1. Volgistics uses this box to track the volunteer's Role in Assignments. There is not a way to import this information using the Import Utility program. To enter this information, you have two options. One is to enter the information after the records have been imported. [Help topic 2399](#) in the Volgistics help library shows how to do this. The other option is to use the [Jump-Start Service](#) to import your information instead of the Import Utility program.

2. Volgistics uses these fields for the Volunteer and Assignment Matching feature. If you do not have this feature turned on in your account, these fields will not appear here. There is not a way to use these fields with the Import Utility program. To learn more about this feature, please see [Help topic 2249](#) in the Volgistics help library.
3. You may import a volunteer's "Life" hours. Life hours are the sum of all of the volunteer's previous volunteer hours. Please consider the following when you're importing this information:
  - The source file number must *not* include commas. So 5,162 should appear as 5162. If the source file number includes commas, the data will not be imported for this field.
  - The source file number must not exceed 9,999. If you have volunteers who have served over 9,999 hours, you should enter their hours manually after the import has completed. You will need to break their service into multiple entries. For example, a volunteer with 12,835 hours could have one entry for 8,000 hours and one entry for 4,835 hours.
  - Decimal values will be converted to minutes. For example, an entry for 4562.5 will import as 4,562 hours and 30 minutes.

When you import a Life hour value, the Import Utility adds a single service entry record. Then when you begin adding new volunteer hours for the volunteer, their new hours are added to this value so their new Life hours are the sum of the hours converted into Volgistics plus the hours recorded for the volunteer in Volgistics.

If you also import a *Date active* and/or *Date inactive* for a volunteer, the service entry created for the volunteer's Life hours will include the volunteer's date active or date inactive, whichever is earlier. The service entry will have a *From date* using the *Date active* or *Date inactive*, and a *To date* of the date the import was performed.

If you do not import a *Date active* or a *Date inactive* for a volunteer, the service entry created for the volunteer's Life hours will use the date the import was performed.

Please note: The *Date of last activity* field that appears in the Statistics box on the volunteer's Core tab is taken from the last service entry showing on the volunteer's record. So importing the Life hours will make this show with whatever date the import was performed. [Help topic 2259](#) in the Volgistics help library explains more.

If your source database includes individual hour records for past service, and you would like to transfer these detailed records into Volgistics (rather than a single lump-sum entry), consider the Volgistics [Jump-Start Service](#). The Jump-Start Service allows the conversion of individual hour records.

4. This area is where you make new service hour entries for individual volunteers. [Help topic 2021](#) in the Volgistics help library shows how to do this. There are also three other ways service information can be entered into Volgistics. [Help topic 1166](#) in the Volgistics help library has more information about these.

## History Tab Considerations

### Appleton, Steve

Core Profile Service Schedule **History** Contacts Notes Vic

Save Cancel  Tagged New Previous Next

#### Checklist

Checklist items Save Refresh

**1** —

**2** **Dates** Start date: 01-01-2012 i Date entered: 09-13-2012 i **4**

**3** Stop date: 08-01-2012 i

	Event	Date	Expires	Notation		
<b>5</b>	Status	Inactive	08-01-2012			Edit Delete
	Status	Active	01-01-2012			Edit Delete

**Add**

Add a:  v date

Event:

Date:  c Expires:  c

Save Cancel

#### Messages

Expand all

Sent	Subject	Sent to	Viewed	Result
09-18-2012	VicTouch			<span style="color: green;">■</span>

1. The Checklist box is where Checklist items that apply to the volunteer, and Awards the volunteer is eligible to receive, appear. If no Checklist items or Awards are setup yet in your account, or none of the Checklist items or Awards setup apply to the volunteer, nothing will appear in this box. Help topics [2238](#) and [3022](#) in the Volgistics help library explain more about how to use these features.

There is not a way to import information to this box using the free Import Utility program.

2. You can import each volunteer's *Date active* (Start date) using the free import utility. By default, this is the first date your volunteer has an Active Status with your organization. Help topics [2314](#) and [2315](#) in the Volgistics help library explain more.

Your source data's *Date active* field (column) must contain consistently formatted date values. See [Appendix G](#) (page 47) for more information.

3. You can import each volunteer's *Date inactive* (Stop date) using the free import utility program. By default, this is the first date your volunteer has an Inactive Status with your organization *after* they have met the requirements for the Start date rule setup for your account. Help topics [2314](#) and [2315](#) in the Volgistics help library explain more.

Your source data's *Date inactive* field (column) must contain consistently formatted date values. See [Appendix G](#) (page 47) for more information.

4. The *Date entered* field records the date the volunteer record was added to your database. This will show on the records created with the Import Utility as the date the records were received from the Applications tab of your Volgistics Mailbox. This may, or may not, be the same date as the Import Utility program was run depending on whether or not you received the records on the same date as you ran the Import Utility program.

There is not a way to edit, or change, the *Date entered* field.

5. Importing records with the Import Utility program will create an Inactive Status date on the record if your source data contained a correctly formatted date field that was directed to the *Date inactive* field. An Active Status date will be created if your source file contained a correctly formatted date field directed to the *Date active* field.

If you do not direct information to the *Date inactive* or *Date active* fields, the record will be created with a Status date using the default Status for your account and the date the record was received. You can find more information about Status dates and setting the default Status in [Help topic 2014](#) in the Volgistics help library.

6. The Messages box is used to track email and Vic Mail messages sent to the volunteer. There is not a way to import information to this box using the Import Utility program. You can find more information about tracking messages in [Help topic 2064](#) in the Volgistics help library.

## Contacts Tab Considerations

The view below shows a typical view of the Contacts tab for new trial accounts. Your view may appear different than this depending on whether or not certain fields are hidden or not. [Help topic 2017](#) in the Volgistics help library explains more about changing the hidden setting in your account.

The Import Utility can only be used to import one contact per volunteer record. Additional contacts can be added after records have been received by clicking the "Add a new contact" button on the Contacts tab.

### Appleton, Steve

The screenshot shows the 'Contacts' tab for a volunteer named Steve Appleton. The form is titled 'Emergency contact' and contains the following fields and callouts:

- 1**: Kind: Emergency contact (dropdown menu)
- 2**: Relationship: Spouse (dropdown menu)
- 3**: Verified: (text input field)
- 4**: Employer name: (text input field)
- 5**: Home: (text input field) with 'Ok to call' checkbox
- 6**: Cell: (text input field) with 'Ok to call' checkbox
- 7**: Fax: (text input field) with 'Ok to call' checkbox
- 8**: Other: (text input field) with 'Ok to call' checkbox

Other fields visible include: Last name: Appleton, First name: Elizabeth, Middle name: B., Title: Mrs., Nickname: Liz, Street 1, Street 2, Street 3, City, State, Zip, Email, and Pager.

1. The Contacts tab can be used to store other types of contacts for volunteers other than Emergency Contacts. These include Employers, References, and Relatives. However, all records received through the Import Utility program will have "Emergency Contact" listed as the kind of contact. Once the record is received, the Kind field could be changed to be a different kind of contact such as an Employer, Reference, etc.

You can add (or change and/or delete) the Kind options that appear by default. Help topics [2017](#) and [2018](#) in the Volgistics help library explain more about how to do this.

2. Each contact can have a relationship to the volunteer. By default, there are options for Co-worker, Daughter, Father, Friend, Mother, Neighbor, Son, Spouse and Supervisor. If your source data's entry for this field does not match the spelling of a default entry exactly, a new entry will be created in the table.

You can add, change, or delete table entries before or after the import occurs. Help topics [2017](#) and [2018](#) in the Volgistics help library explain more about how to do this.

3. Contact records have a *Verified date* field as well as a *Spare date* field that can be added. These can be used to record things such as when the information was entered or last checked for accuracy.

Date records imported with the Import Utility program must be in one of the date formats shown in [Appendix G](#) (page 47).

4. There is not a way to import information to the *Employer Name* field using the Import Utility program. This information would need to be added after the records are received into your database.
5. The "Ok to call" checkboxes will default to checked for any phone number field you import a phone number to. If you import this value from your source data, it will be checked only if your source data includes a value of "True," "Yes," or "Y." The field will also appear as checked if you have it setup to be checked by default and your source file has a blank (empty) entry for the record. In order for the "Ok to call" checkbox not to be checked, your source data must include a value of "False," "No," "N," or some other non-standard value.
6. Your source data must conform to the type of phone number formatting you set for your Volgistics database. For example, if you set your Volgistics database to require a three digit area code and seven digit phone number for the Home phone number field on the Contacts tab, only phone numbers that contain all ten digits will be imported for this field. Or, if you setup for the area code to be optional, but the seven digits to be required, phone numbers with either seven or ten digits will be imported. Phone numbers that contain a different number of digits than your setup requires will be dropped and you will receive a notification of this in the import log. You set phone number formatting rules for your account under "Field Options" in Setup.
7. Your source data must conform to the type of zip or postal code formatting you set for your Volgistics database. For example, if your account is set for US or Canadian formatting (this is the default in a trial account), then the field must have either 5 or 9 digits for United States zip codes, or 6 characters arranged in letter-digit-letter-digit-letter-digit format for Canadian postal codes. Values in the source data that do not meet the formatting requirements will not be imported and you will receive a notification of this in the import log. You set zip or postal code formatting rules for your account under "Field Options" in Setup.
8. Your source data must conform to standard email address formatting. This requires that there is information for a user name, the "at" symbol (@), and a domain. For example, user@domain.com, user@domain.ca, and user@domain.k12.us.edu are all valid and will be imported. However, user@domain and user.com will not be imported because they are not complete.

## Notes Tab Considerations

Appleton, Steve

Core Profile Service Schedule History Contacts **Notes** Vic

Tagged New Previous Next

Notes i Save Cancel Clear

1

1. You can optionally import text data to the Notes tab. The Notes tab provides a single text area for recording narrative information you want to store in a volunteer's record. The Notes tab is provided as reference only. There are no provisions for sorting volunteer information in your account according to data you store on the Notes tab.

## Appendix D – Find & Replace in Your Source Data

There may be times when you need to adjust values in your source data file to make your data consistent, or to conform to formatting standards in Volgistics. Specifically, you may need to find all of the instances of a particular value in your source data and replace them with another value.

This is easy to do with a spread sheet program. This section shows you how to *find and replace* data this using Microsoft Excel. Depending on the version of Excel you're using, your view and steps may be different. However, the overall process will be similar. This is true for other spread sheet programs too. You may need to refer to the help documentation of the program and/or version of the program you're using for additional help.

Consider the following example:

Your source data file contains a column you titled "Weekend." You use this field to show if the volunteer is available on weekends by placing an "X" in the column if they *are* available, and leaving the field blank if they are *not*.

Here's what this might look like in your source data file:

Last Name	First Name	Weekends
Anderson	Amelia	X
Amborski	Peggy	
Bennett	Robert	X
Burks	James	X

Given this example, you've decided you want to use the Flags field on the Core tab to show when a volunteer is available on weekends. You want any volunteer that currently has an "X" in the Weekends column to have a Flag in Volgistics called "Weekends."

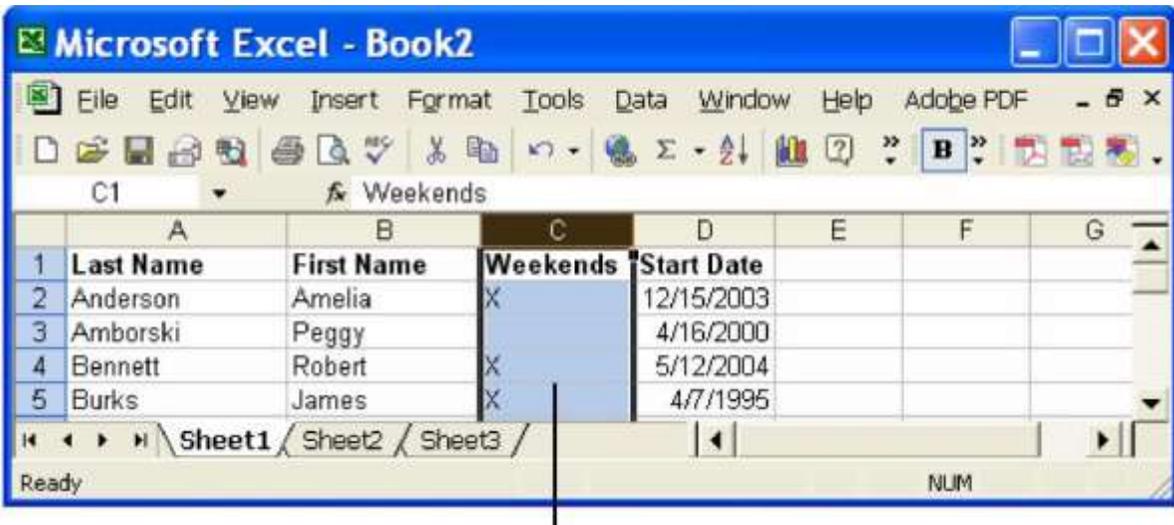
The problem is this, if you told the Import Utility to convert the Weekends column to the Flags field as it is shown above, the letter "X" is what would be inserted because this is the value the field currently contains. Remember that the Flags field can hold many different flags, so each flag should be a meaningful word or phrase. In this case, the flag should be "Weekends," not "X."

The solution is simply to change all of the "X's" in the Weekends column to the word "Weekends." The Import Utility would then insert the word "Weekends" rather than an "X" in the Flags field for each volunteer who is available on weekends.

To *find and replace* all of the "X's" in this column with the word "Weekends":

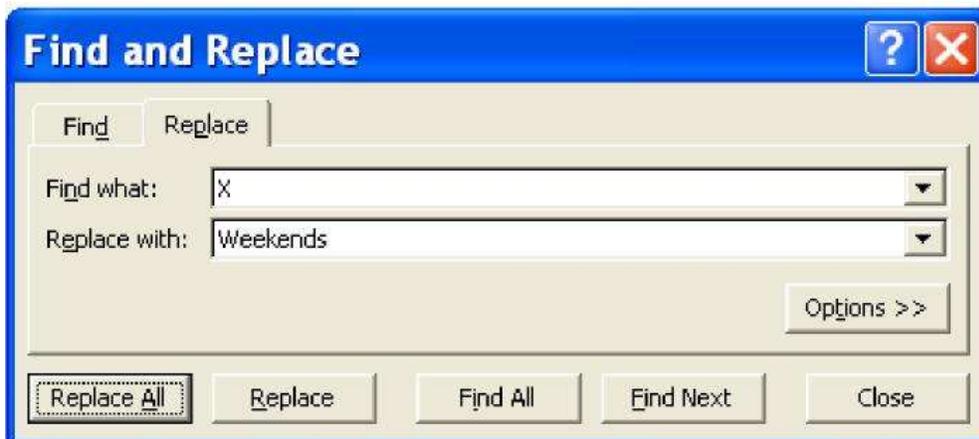
1. Open your source file in Microsoft Excel.

2. Click on the letter at the top of the column you want to change. This causes the selected column to be highlighted, as shown below.

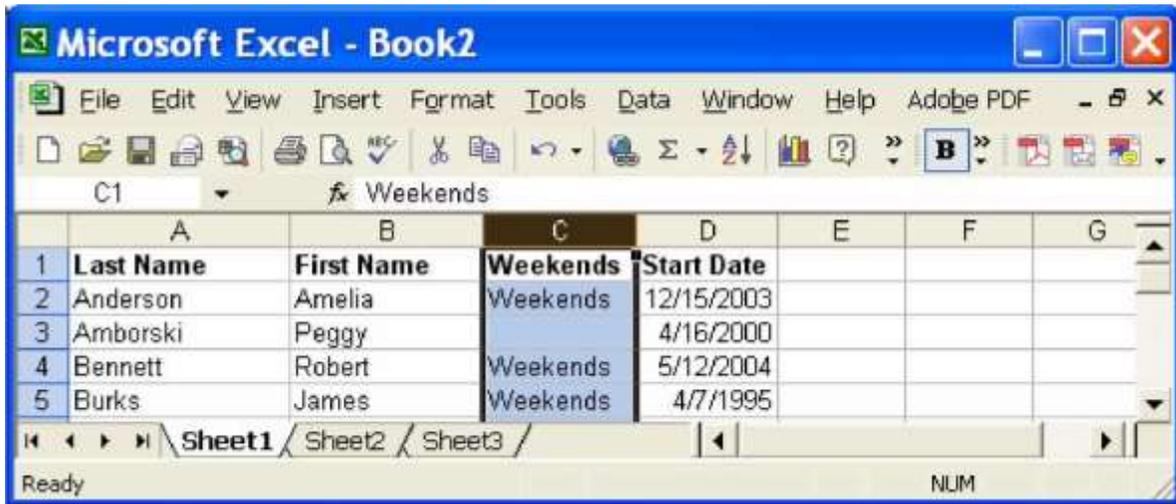


Highlight the column you want to find and replace within

3. Choose the **Edit** menu, and then click on *Replace* to open the *Find and Replace* window shown below.
4. Enter "X" (the value you want to replace) in the *Find what* field.
5. Enter "Weekends" (the new value) in the *Replace with* field, as shown here:



- Click the **Replace All** button to replace all of the values in the highlighted column. Excel will replace all of the "X" values with the word "Weekends" as shown here:



- When you save your changes to your source data file, be sure to save it as a comma or tab delimited text file rather than an .XLS or .XLSX file. [Appendix A](#) (page 13) has help on how to do this if you need it.

In the example given above, you would now be ready to convert the Weekends column to the Flags field in Volgistics. The Flag will appear as "Weekends" in Volgistics because that is now the value that appears in the data.

## Appendix E - Windows HTTP Errors

The Import Utility connects to the Volgistics system through a set of Microsoft Windows components known as "Winsock" or "windows sockets." These components handle the network connection between your computer and the Volgistics system. If any errors occur during this connection, the Microsoft Windows operating system may display an error message with one of the following error numbers.

These error numbers and their generalized description are provided for your use in troubleshooting connection issues. Where an error may be caused by a setting in the Import Utility, additional information about the error is provided.

### HTTP Errors

- 118 Firewall Error. Error description contains detailed message.
- 143 Busy performing current action.
- 151 HTTP protocol error. The error message has the server response.
- 152 No server specified in URL.
- 153 Specified URL Scheme is invalid.
- 156 Invalid cookie index (out of range).
- 301 Operation interrupted (or timeout).
- 302 Can't open Attached File.

### SSL Specific Errors

- 270 Cannot load specified security library.
- 271 Cannot open certificate store.
- 272 Cannot find specified certificate.
- 273 Cannot acquire security credentials.
- 274 Cannot find certificate chain.
- 275 Cannot verify certificate chain.
- 276 Error during handshake.
- 280 Error verifying certificate.
- 281 Could not find client certificate.
- 282 Could not find server certificate.
- 283 Error encrypting data.
- 284 Error decrypting data.

### Winsock Errors

- 10004 [10004] Interrupted system call.
- 10009 [10009] Bad file number.
- 10013 [10013] Access denied.
- 10014 [10014] Bad address.
- 10022 [10022] Invalid argument.
- 10024 [10024] Too many open files.
- 10035 [10035] Operation would block.
- 10036 [10036] Operation now in progress.

### Winsock Errors (continued)

10037 [10037] Operation already in progress.  
10038 [10038] Socket operation on non-socket.  
10039 [10039] Destination address required.  
10040 [10040] Message too long.  
10041 [10041] Protocol wrong type for socket.  
10042 [10042] Bad protocol option.  
10043 [10043] Protocol not supported.  
10044 [10044] Socket type not supported.  
10045 [10045] Operation not supported on socket.  
10046 [10046] Protocol family not supported.  
10047 [10047] Address family not supported by protocol family.  
10048 [10048] Address already in use.  
10049 [10049] Can't assign requested address.  
10050 [10050] Network is down.  
10051 [10051] Network is unreachable.  
10052 [10052] Net dropped connection or reset.  
10053 [10053] Software caused connection abort.  
10054 [10054] Connection reset by peer.  
10055 [10055] No buffer space available.  
10056 [10056] Socket is already connected.  
10057 [10057] Socket is not connected.  
10058 [10058] Can't send after socket shutdown.  
10059 [10059] Too many references, can't splice.  
10060 [10060] Connection timed out.  
10061 [10061] Connection refused.  
10062 [10062] Too many levels of symbolic links.  
10063 [10063] File name too long.  
10064 [10064] Host is down.  
10065 [10065] No route to host.  
10066 [10066] Directory not empty  
10067 [10067] Too many processes.  
10068 [10068] Too many users.  
10069 [10069] Disc Quota Exceeded.  
10070 [10070] Stale NFS file handle.  
10071 [10071] Too many levels of remote in path.  
10091 [10091] Network subsystem is unavailable.  
10092 [10092] WINSOCK DLL Version out of range.  
10093 [10093] Winsock not loaded yet.  
11001 [11001] Host not found.

This error may occur if your Connection Settings include a proxy server or firewall host name (that is, an IP address or a host name) that is invalid. Examine the Connection Settings in the Volgistics Import Utility. To do this, start the Utility and then click "Connect Settings". See [Appendix F](#) (page 44) for more information on this.

If your connection settings are configured to "Use the Windows Explorer connection settings," there may be an invalid proxy server or firewall configuration in the computer's registry (for example, from a previous proxy or firewall installation that no longer exists). In this case you may connect successfully by changing your Connection Settings to "Use My connection settings," with

**blank** (or the correct) proxy and/or firewall host names or IP addresses.

If your connection settings are configured to "Use My connection settings," verify that the Proxy Address and Firewall Address are valid and entered correctly, or remove the Proxy and Firewall Addresses if no proxy server or firewall settings are required.

This error may also occur if there is a DNS failure which prevents the utility from resolving the Proxy or Firewall addresses, if any are specified.

#### Winsock Errors (continued)

11002 [11002] Non-authoritative "Host not found" (try again or check DNS setup).

11003 [11003] Non-recoverable errors: FORMERR, REFUSED, NOTIMP.

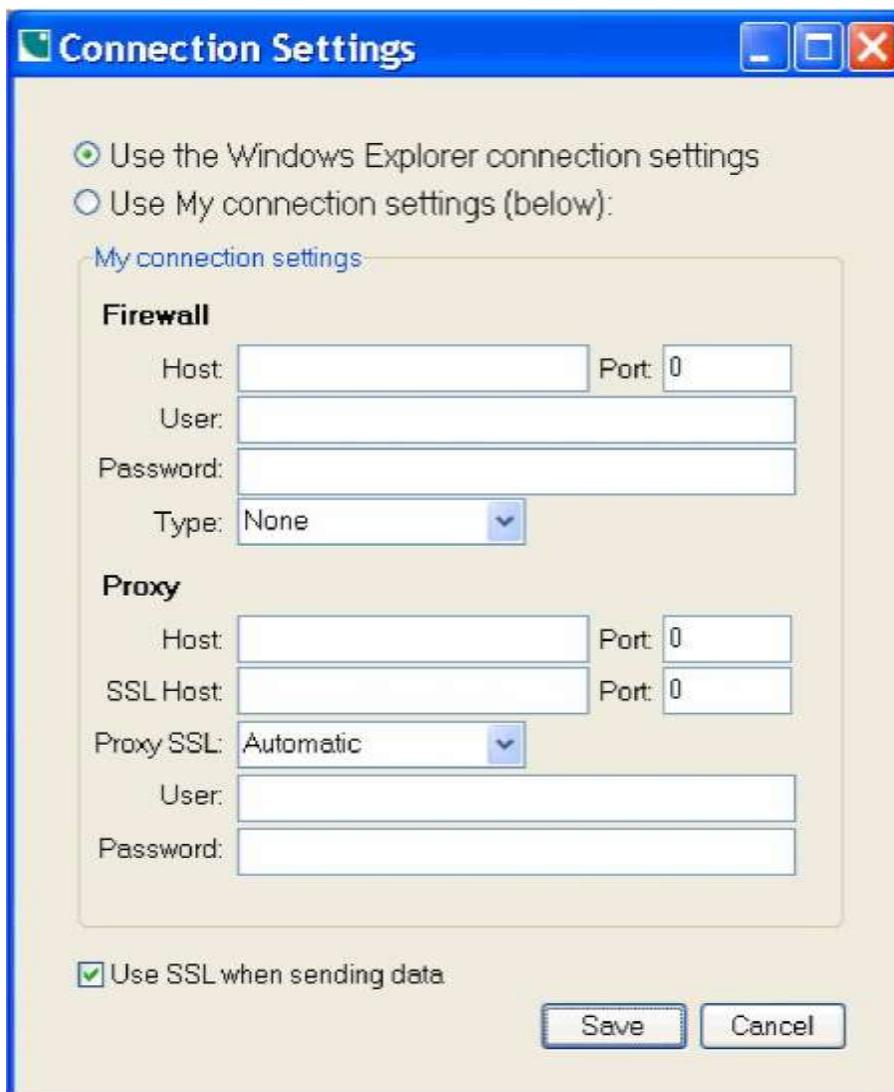
11004 [11004] Valid name, no data record (check DNS setup).

## Appendix F - Configuring Internet Connection Settings

By default, the Import Utility will attempt to connect to Volgistics using the same settings your web browser uses for secure Internet connections. You should change the Import Utility's connection settings only if you cannot connect using the default settings.

To change the Internet connection settings manually:

1. Start the Import Utility.
2. Click **Start**.
3. Click the **Connection settings** button. This opens the Internet connections settings window shown here:



The screenshot shows a Windows-style dialog box titled "Connection Settings". At the top, there are standard window control buttons (minimize, maximize, close). Below the title bar, there are two radio buttons: "Use the Windows Explorer connection settings" (which is selected) and "Use My connection settings (below):". Under the second option, there is a section titled "My connection settings" which contains two sub-sections: "Firewall" and "Proxy". The "Firewall" section has fields for "Host", "Port" (set to 0), "User", "Password", and a "Type" dropdown menu set to "None". The "Proxy" section has fields for "Host", "Port" (set to 0), "SSL Host", "Port" (set to 0), "Proxy SSL" dropdown menu set to "Automatic", "User", and "Password". At the bottom of the dialog, there is a checked checkbox labeled "Use SSL when sending data" and two buttons: "Save" and "Cancel".

The Connection Settings window provides these setting options:

#### Use the Windows Explorer connection settings

When selected, the Import Utility uses the same Internet connection settings as Microsoft Internet Explorer (or the computer's default browser). Selecting this option saves you from having to configure the Internet connection manually. This option is selected by default.

#### Use My connection settings (below)

Select this option to manually configure your Internet connection. Select this option only if you experience a connection problem using the Windows Explorer connection settings, or if you want to manually specify Proxy Server or Firewall settings.

### **My Connection Settings**

Enter the firewall and/or proxy server information required for your Internet connection. In most cases, you will use one or the other section, but not both. If your network does use both a firewall and a proxy, though, fill in the information in both sections. The settings in this box are not used unless you select the "Use My connection settings" option.

#### Firewall Host

Leave this field blank unless you know this computer requires these firewall settings for its Internet connection. Enter the dotted IP address or network name of the firewall host. The entry in this option has no effect unless you choose "Use My connection settings."

#### Firewall Port

Enter the port number for the firewall host. The entry in this option has no effect unless you choose "Use My connection settings" and enter a firewall host.

#### Firewall User

If your firewall requires a user name, enter it here. The entry in this option has no effect unless you choose "Use My connection settings" and enter a firewall host.

#### Firewall Password

If your firewall requires a user password, enter it here. The entry in this option has no effect unless you choose "Use My connection settings" and enter a firewall host.

#### Firewall Type

Select the firewall type here. "None" is the likely selection if you're uncertain. The entry in this option has no effect unless you choose "Use My connection settings" and enter a firewall host.

#### Proxy Host

Leave this field blank unless you know this computer connects to the Internet through a proxy server, and you know the proxy server settings. Enter the dotted IP address or network name of

the proxy server. The Import Utility directs all Internet traffic to the proxy server you specify. The entry in this option has no effect unless you choose "Use My connection settings."

#### Proxy Port

Enter the port number for the proxy host. The entry in this option has no effect unless you choose "Use My connection settings" and enter a proxy host.

#### SSL Host

Leave this field blank unless you know this computer connects to the Internet through a SSL proxy host, and you know the settings. Enter the dotted IP address or network name of the SSL proxy host. The Import Utility directs all Internet traffic to the SSL proxy host you specify. The entry in this option has no effect unless you choose "Use My connection settings."

#### SSL Port

Enter the port number for the SSL proxy host. The entry in this option has no effect unless you choose "Use My connection settings" and enter a SSL host.

#### Proxy SSL

Select the proxy SSL type here. "Automatic" is the likely selection if you're uncertain. The entry in this option has no effect unless you choose "Use My connection settings" and enter a SSL host.

#### Proxy User

If your proxy host requires a user name, enter it here. The entry in this option has no effect unless you choose "Use My connection settings" and enter a proxy host.

#### Proxy Password

If your proxy host requires a user password, enter it here. The entry in this option has no effect unless you choose "Use My connection settings" and enter a proxy host.

#### Use SSL when sending data

When checked, the Import Utility uses secure sockets layer (SSL) technology to encrypt the information you send to the Volgistics system during the conversion. This should normally be checked in order to provide the highest level of security possible during the transfer.

When this is not checked, the Import Utility does not use SSL connections to transfer your data. This is a less secure approach, but it enables the utility to connect in situations where the computer used to run the Import Utility does not support SSL connections.

**4.** Click **Save** to save your settings.

# Appendix G - Date Formats

## MDY

Dates formatted in the order of month–day–year. If delimiters (characters used to separate month, day and year) appear, they may be any non-numeric character such as a slash (/), a dash or hyphen (-), or a period (.). You may use either one or two digits for the month and day, and either two or four digits for the year.\* If no delimiters appear in the source data, dates must have two digits for the month and day, and either two or four digits for the year.\*

Examples:

01/31/09  
01-31-2009  
1.31.09  
013109  
01312009

## DMY

Dates formatted in the order of day–month–year. If delimiters (characters used to separate day, month and year) appear, they may be any non-numeric character such as a slash (/), a dash or hyphen (-), or a period (.). You may use either one or two digits for the month and day, and either two or four digits for the year.\* If no delimiters appear in the source data, dates must have two digits for the month and day, and either two or four digits for the year.\*

Examples:

31/01/09  
31-01-2009  
31.1.09  
310109  
31012009

## YMD

Dates formatted in the order of year–month–day. If delimiters (characters used to separate year, month and day) appear, they may be any non-numeric character such as a slash (/), a dash or hyphen (-), or a period (.). You may use either one or two digits for the month and day, and either two or four digits for the year.\* If no delimiters appear in the source data, dates must have two digits for the month and day, and either two or four digits for the year.\*

Examples:

09/01/31  
2009-01-31  
2009.01.31  
090131  
20090131

### **MY (no day)**

Dates formatted in the order of month–year, where no specific day is recorded. If delimiters (characters used to separate month and year) appear, they may be any non-numeric character such as a slash (/), a dash or hyphen (-), or a period (.). You may use either one or two digits for the month, and either two or four digits for the year.\* If no delimiters appear in the source data, dates must have two digits for the month, and either two or four digits for the year.\*

Examples:

01/09  
01-2009  
01.2009  
0109  
012009

Since all Volgistics date fields require a complete date entry (except for the Date of Birth), the Import Utility changes dates you convert that are missing a day value to the 1<sup>st</sup> of the month. For example, 01/09 converts to 01/01/2009.

### **MD (Y optional)**

The Volgistics Date of Birth field supports this additional date format.

Dates formatted in the order of month–day (without any year) or as month-day-year. If delimiters (characters used to separate month and day) appear, they may be any non-numeric character such as a slash (/), a dash or hyphen (-), or a period (.). You may use either one or two digits for the month and day, and either two or four digits for the year.\* If no delimiters appear in the source data, dates must have two digits for the month and day, and either two or four digits for the year.\*

Examples:

01/31  
01-31  
0131  
01/31/62  
01-31-1962

### **DM (Y optional)**

The Volgistics Date of Birth field supports this additional date format.

Dates formatted in the order of day-month (without any year) or as day-month-year. If delimiters (characters used to separate day and month) appear, they may be any non-numeric character such as a slash (/), a dash or hyphen (-), or a period (.). You may use either one or two digits for the month and day, and either two or four digits for the year.\* If no delimiters appear in the source data, dates must have two digits for the month and day, and either two or four digits for the year.\*

Examples:

31/01

31-01

3101

31/01/62

31-01-1962

**\* When two digit year values are converted, the Import Utility considers all year values between zero and the current calendar year plus nine years to start with '20.' All other two digit year values will be converted to start with '19.'**

**So if the current year is 2012, two digit year values starting with '00' and going through '21' will be converted with '20' added to the front. All others will be converted with '19' added to the front. For example, '11' would be changed to '2011,' '21' would be changed to '2021,' '22' would be changed to '1922' and '78' would be changed to '1978.'**

**As the current year's two digits value increases, the years converted with '20' will also increase. For example, when the current year is 2013, the '20' added to the front will extend to '22' (13 plus 9 years). So all years between and including '00' and '22' would be converted with '20' added to the front. All others would continue to be converted with '19' added to the front.**

# Appendix H - Troubleshooting

## Import Utility cannot connect to the Volgistics system

If the Import Utility cannot connect to the Volgistics system, check your computer's Internet connection. You should be able to browse web sites that are outside of your organization's network, including [www.volgistics.com](http://www.volgistics.com) from the computer where you run the conversion. If you can browse the Internet from the computer you are using to run the Import Utility, but you still cannot connect to the Volgistics system, check these things:

1. Some organizations use firewalls to control Internet access. If your organization uses a firewall, check with the people, or department, that maintain the firewall to be sure it does not prevent you from making SSL connections to <https://www.volgistics.com>.
2. Some organizations use Proxy Servers to manage Internet access. If your organization uses a proxy server, see [Appendix F](#) (page 44).

## Internet connection drops during the conversion

A dropped Internet connection will not damage any data, but it will leave the conversion incomplete and you'll need to start the conversion over again. The Import Utility will not insert duplicate records into your Volgistics account when restarted.

## Invalid account number, login name, or password

If you receive an error that you have entered an invalid account number, login name, or password when you try to connect with Import Utility, verify your entries by attempting to login to your Volgistics account at [www.volgistics.com](http://www.volgistics.com) using the same account number, login name, and password.

If you **cannot** Login to Volgistics using these credentials, the account number, login name, or password you are using are invalid. Contact your organization's Volgistics administrator, or obtain your forgotten password by using the "Forget your password?" link on the login screen. You might also find the information in Help topics [2297](#) and [2248](#) in the Volgistics help library helpful.

If you **can** login to Volgistics at [www.Volgistics.com](http://www.Volgistics.com) using the same credentials you're using to start the Import Utility, but the Import Utility continues to report an invalid account number, login name, or password, the your computer may not be properly configured for secure Internet traffic. This could be the case if your organization connects to the Internet through a proxy server. To correct this, see [Appendix F](#) (page 44).

## Import utility "hangs" or does not complete conversion process

The normal amount of time required to convert your volunteer information will vary depending on factors such as the number of records being imported, the number of fields you're importing and the speed of your Internet connection. If an abnormally long amount of time passes after you start step 6 of the conversion process and the process does not complete, there may be a problem with the formatting of your source data.

This problem occurs most frequently with source files saved in the comma delimited format

when one or more rows of volunteer information have an extra comma. This throws off the delimiter count, which causes the process to not complete. For example, if the following table were used as a source file the problem would be caused by the information in the highlighted cells:

Last Name	First Name	Street 1	Street 2	City
Anderson	Amelia	897 Elm Street		Bedford Falls
Amborski	Peggy	181 2 <sup>nd</sup> St., Apt. C		Bedford Falls
Bennett	Robert	1924 E. Leonard	Apt. 3E	Bedford, Falls
Burks	James	98 Wailing Brook	Suite 18	Bedford Falls

Because saving the source file in comma delimited format places a comma between each column in the table, having commas in the highlighted cells places an extra comma delimiter in those rows of the source data. The same problem could potentially happen if extra tabs appear in rows when the source file is saved in tab delimited format.

If the source file was saved in comma delimited format, the easiest way to fix this is to open the original volunteer file in Excel (or whatever spread sheet program you're using) and save it in tab delimited format instead of comma delimited format. [Appendix A](#) (page 13) has more information on how to do this.

If the file is already in tab delimited format, or you prefer to keep the file in comma delimited format, you will need to open the original volunteer file in Excel (or whatever spread sheet program you're using) and correct the cells with the extra delimiters. If you have a large file, you may want to use the find or search feature to locate the comma or tab characters in your data. You can search for a tab character by entering "\t" in the search field. After the extra delimiters have been removed from the data, you will need to resave the file to use for the import.

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