

Importing Existing Data Files into the One Vision Data Directory

Supported Data Sources:

Access

Excel 5.0

Excel 8.0 or Higher

Steps:

- 1) From the Utilities Menu, select System Maintenance>Import Data
- 2) Choose the Data Source from the dropdown menu
- 3) Click the Open Database (Or Worksheet) Button
- 4) Browse to locate your existing data file name
- 5) Select the specific table (or sheet) from From Table dropdown.
- 6) Select the specific table (or sheet) from To Table dropdown.
There is only one to pick.
- 7) At the bottom two lists will appear with One Vision database field names on the right and your field names on the left.
Match each field name on the left with the corresponding field name on the right.

It may warn you that the size of the fields are different, select "Yes" to map anyway.

- 8) When you are done, Click Transfer Data. This will save the new database to a temporary (spreadsheet style) file that you can edit if necessary.
- 9) Then, when you are satisfied that your information is accurate, click Load Data into OneVision.
- 10) This new data is **appended** to any data you have entered into One Vision.

Fields Required for Import

First	(FirstName)
Last	(LastName)
Status	One Vision Values: -Active -Inactive
Category	One Vision Values: -Member -Visitor
Type	One Vision Values: -Person -Business
Gender	One Vision Values: -Male -Female -Unknown

Age Group

One Vision Values:

-Adult

-Child

Phone Number

(XXX) XXX-XXXX

Format:

Salutations

Must be defined in One Vision. Please check the One Vision list first and make any additions you choose.