

HeadMaster Import

The purpose of the HeadMaster Import process is to reduce your amount of manually-keyed data and save you hours of time at the keyboard. You can use the import process to pull names, addresses, as well as multiple other categories of student contact data from .csv or .xml import files into HeadMaster. To ensure the import process works properly, your import file should contain separate columns for each data category. For example, each data category such as Last Name, First Name, Date of Birth, etc. should have its own column.

The imported data does not overwrite your existing data. It only adds students to your existing database. For example, if you have John Smith entered in HeadMaster, and then you add his data with a new import, you'll have two entries for John Smith within your database.

Useful Information

To use the HeadMaster Import process, you must have created a backup of your program data within the past 2 days.

Importing data into HeadMaster is accomplished through mapping (or linking) fields in your import file with the appropriate fields in HeadMaster. The procedure below will guide you through the process.

1. Open the **HeadMaster Import**.
 - a.) **Windows 7:** On your Windows desktop, click the Start button  in the lower-left corner of the screen. The Start menu displays. Click **All Programs > HeadMaster > HeadMaster Import**. Log in with your user name and password, and click **OK**.
 - b.) **Windows 8.1:** On the Windows desktop, click the Start button  in the lower-left corner of the screen. The Start screen displays. Click the arrow button . The Apps view displays. In the HeadMaster section, click **HeadMaster Import**. Log in with your user name and password, and click **OK**.
 - c.) **Windows 10:** On the Windows desktop, click the Start button  in the lower-left corner of the screen. The Start menu displays. Scroll to the HeadMaster section, and click **HeadMaster Import**. Log in with your user name and password, and click **OK**. [Link](#)
2. The HeadMaster Import dialog box displays. Click the  ellipses button, and browse to the file that you want to import.
3. Select whether the imported data is for enrolled or prospective students.
4. In the Data View section, verify that you are importing the correct data.
5. Click **Next**.
6. Click and drag each Source Field category from the left column to an equivalent category in the right column. In this step, you're *mapping* the fields. Click  to expand other data categories that you may want to map and import.

Useful Information

The Last Name is the only required field for import. Any record that doesn't have a last name is imported and given the last name "Converted (no last name)."

7. If your import file is one that you'll use more than once, you can click **Save Map** in the upper-right corner of the window. You'll be prompted to provide a name for your new *map file*. In the future, you can access your saved map files by clicking **Load Map** whenever you're in this window.
8. Click **Finished**.

Once you've imported your data, you should verify that it imported correctly. If the import results are incorrect, you can correct any issues in the import file; restore the last backup that you made; and then run the import process again.