

Importing Student Information into Microsoft Outlook for Address Cards

Goal

The purpose of this document is to show how you can run a report from SOLUS that will give you all the students in specific programs and allow you use this data to create address cards for each student in Microsoft Outlook.

Advantages

After you have created an address card, if you get an email from a student with only xxx@queensu.ca in the "From:" field you can right-click on the name and a dialogue box will appear with the full name of the student, their program and projected graduation date (e.g. Class of 2017). If you need more information, you can select "Look up Address Card" from the drop-down menu for the other imported information such as student number and address.

As well, if you need to send an email to a student, in your contacts you can do a quick search on the name and the card will appear. Click on "Email" and you can quickly send them the message.

You can add notes to a student's address card. For example, you may want to note that a particular student is the DSC Chair or an Academic Representative for a particular year.

Steps

1. Run a report in SOLUS that gives produces the required data for importing.
2. Manipulate the data in Excel so it can be imported into Microsoft Outlook.
3. Import the file into Microsoft Outlook.

Get started!

Run report in SOLUS

Path: Reporting Tools | Query | Query Viewer

Select: AH_PGM_PLANS_LIST_BGL

Export to: Excel

Insert appropriate information.

Acad Plan (eg %mast%, %=all):	<input type="text" value="%HLTH%"/>
Term (eg 2159):	<input type="text" value="2159"/>
Acad Group (ASC,ENG, %=all):	<input type="text" value="%"/>
Acad Prog (eg BCMP%, %=all):	<input type="text" value="%"/>
Proj Level (01,02,03,04, %=all):	<input type="text" value="%"/>
Career (ugrd, grad, %=all):	<input type="text" value="UGRD"/>
Addr Type (eg HOME):	<input type="text" value="HOME"/>
Study Form (ENRL, OFFC, %=all):	<input type="text" value="%"/>
Campus (BISC, MAIN, %=all):	<input type="text" value="%"/>

Manipulate the data in EXCEL

1. Delete top row (empty).
2. Delete all columns with information that will not be imported
3. Combine appropriate columns that were separate into one (e.g. program/plan fields, names and home address fields). Formula where G2 is first name cell and H2 is last name cell is:
=CONCATENATE(G2," ",H2). If you need more information on how to do this go to <http://spreadsheets.about.com/od/excelfunctions/qt/07-concatenate.htm>. [If this formula will not work for you in the spreadsheet, it's likely due to formatting. Go to the very last column which will be unformatted and repeat.]
4. Each concatenated column will need three additional steps: (1) Highlight column; (2) Copy; and, (3) Paste special → choose "Values". Information stays in the same column.
5. Delete the original columns (e.g. G2 and H2)
6. In the level field – you will replace the level at Queen's as follows. For Level 3, calculate the targeted year of graduation – e.g. Class of 2015. Do the following steps: (1) highlight the level column; (2) select "Replace"; (3) "Find what" = 3; (4) "Replace with" = Class of 2015; and, (5) click on "Replace all". Save.
7. Delete all columns except the ones to import
8. Rename column names to map onto the address card fields so information will map onto the chosen fields. Choose "Company" for the Degree Plan and "Job Title" for the "Class of ", as these are the fields appear in the dialogue box along with the name.
9. Save as a .csv file

Company	Job Title	Business Fax	Name	Gender	E-mail	Address
HLTH-M-BAH	Class of 2014	10001234	Asad Kurta	F	01@queensu.ca	Emirates Hills Ht 19 Dubai ARE
HLTHPSYC-A	Class of 2014	10004321	John Pike	M	02@queensu.ca	91-1500 Newlands Cres Burlington ON CAN L7M 1V6
HLTH-G-BA	Class of 2014	10001423	Jose Costa	M	03@queensu.ca	230 Applegate Street Apartment 7 Kingston ON CAN K7K 1E4

Notes:

1. ITS advised having the student number in a little used field (students do not normally have a business fax number). If you ever choose to export the cards for updating in a subsequent year, it is important that this field is separate as it will be the field on which to do a sort.
2. When concatenating Program/Plan information leave two spaces between plans for easy viewing, e.g. HLTH-M-BAH PSYC-Y-1.

Import the data into Microsoft Outlook

Go to Contacts in Microsoft, choose a folder in which to input the new address cards and then follow these steps.

At the very top of the screen in the upper-left side, select “File” (orange left-hand upper tab)

On the menu to the left, select “Open”

Choose Import

- Import from another program or file
- Comma Separated File (windows)
- Browse through your computer files and select the .csv file to import.
- Choose from the following:
 - o **Replace duplicates with items imported** Existing data will be overwritten with the information in the file being imported.
 - o **Allow duplicates to be created** Existing data will not be overwritten, and duplicates will be added to the current Outlook folder.
 - o **Do not import duplicate items** Existing data will be kept, and the duplicate information in the file will not be copied to the current Outlook folder.
- Select the destination folder which you’d previously chosen.
- Map Custom Fields by clicking and dragging the icon from the left side to the right side. Check that the number of fields on both sides of the screen match – you do not want to miss one.
 - Name =
 - Company = Degree program
 - Job Title = Class of
 - Email =
 - Business fax = student number
 - Home = address
 - Gender =
- Click on “Finish”.

You’re done!

June 19, 2015

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