Guide for:

IMPORTING A SELECTION

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Anticipated Audience(s):	ADVANCEMENT SERVICES
	EVENTS MANAGEMENT (INTERNAL/EXTERNAL)
	MARKETING COMMUNICATIONS (INTERNAL/external)
	DONOR RELATIONS
	development assistants (general correspondence)

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Adding an Imported Selection

For instances in which a data set is not in *Ali* we can import the data set into a selection to be used within a CRM function that uses selections, such as **Queries** or **Events.**
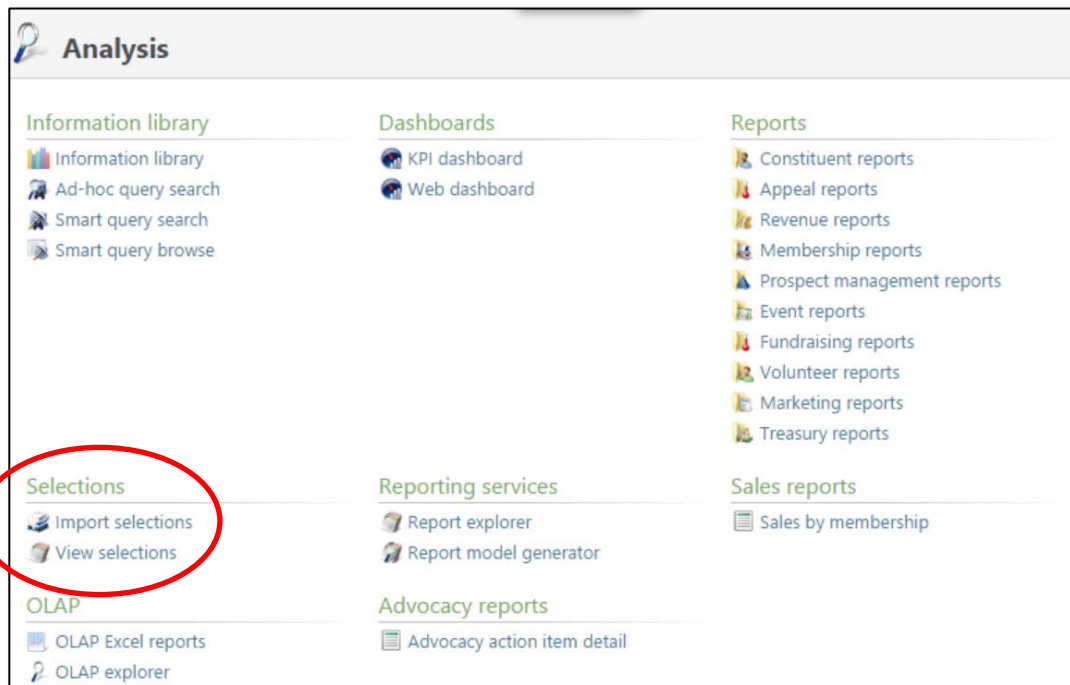
Steps to importing

1. Navigate to the **Analysis** functional area in the blue navigation bar.
2. Click on the **Import selections** under the **Selections** area.
3. Click **Add.**
4. Populate the following fields:
   a. **Name:** please follow the selection naming conventions as outlined in the **Supplemental Reference Guide Naming Conventions and Standards.**
   b. **Description:** All queries must have a description. The **Description** should contain:
      - Retention requirements
        1. If it is used for a business process, the retention should be **Permanent**.
           a. If it is for a Process in *Ali* indicate what that is – Reminders, Receipts, etc.
        2. If it is for a specific project, indicate a date in the future when you believe the project will be complete and the query can be deleted.
           a. Description of the project the query is related to.
   c. **Record Type:** This is dependent on the type of selection you are importing.
      - For example, if you have constituent IDs and need a constituent selection you'd select the *record* type of constituent.
   d. **Category:** Select "Import".
5. Optional Fields
   a. **Site:** if you use Site then it is restricted to processes with a matching site.
   b. Show this selection in the **Query Designer**: only choose this if you need the selection available in an ad-hoc query. This does not need to be selected if you plan to use the imported selection in a process.
      - Example: Do not select this for a selection import that will be used in an event.
6. Choose the **Import File.**
   a. **Note:** the file must be a CSV.
7. Select the **ID column.**
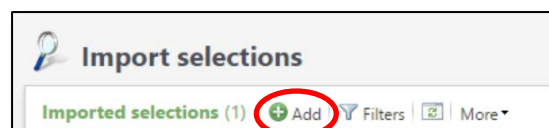8. Select the **ID type** that relates to the ID in the ID column.

9. Click **Save** and **Import.**

10. Confirm the number processed matches your intended results.

    a. **Note:** if the numbers do not match, check your CSV for duplicate ID numbers.
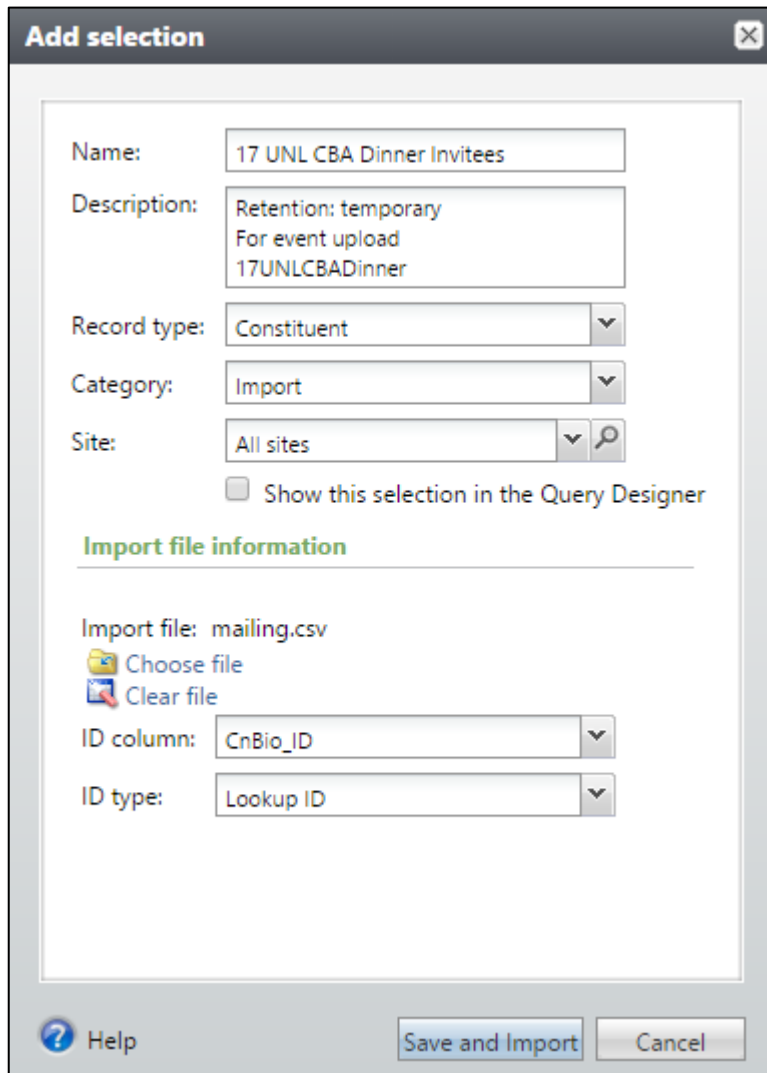
Steps to importing with visuals

1. Navigate to the **Analysis** functional area in the blue navigation bar.

2. Click on **Import selections** under the **Selections** area.

3. Click **Add**.

4. Populate the following fields:

Add selection

Name:	17 UNL CBA Dinner Invitees
Description:	Retention: temporary For event upload 17UNLCBADinner
Record type:	Constituent
Category:	Import
Site:	All sites

☐ Show this selection in the Query Designer

Import file information

Import file: mailing.csv
📁 Choose file
🗋 Clear file

ID column:	CnBio_ID
ID type:	Lookup ID

❓ Help   Save and Import   Cancel

5. Optional Fields
    a. **Site.**
    b. Show this selection in the Query Designer.
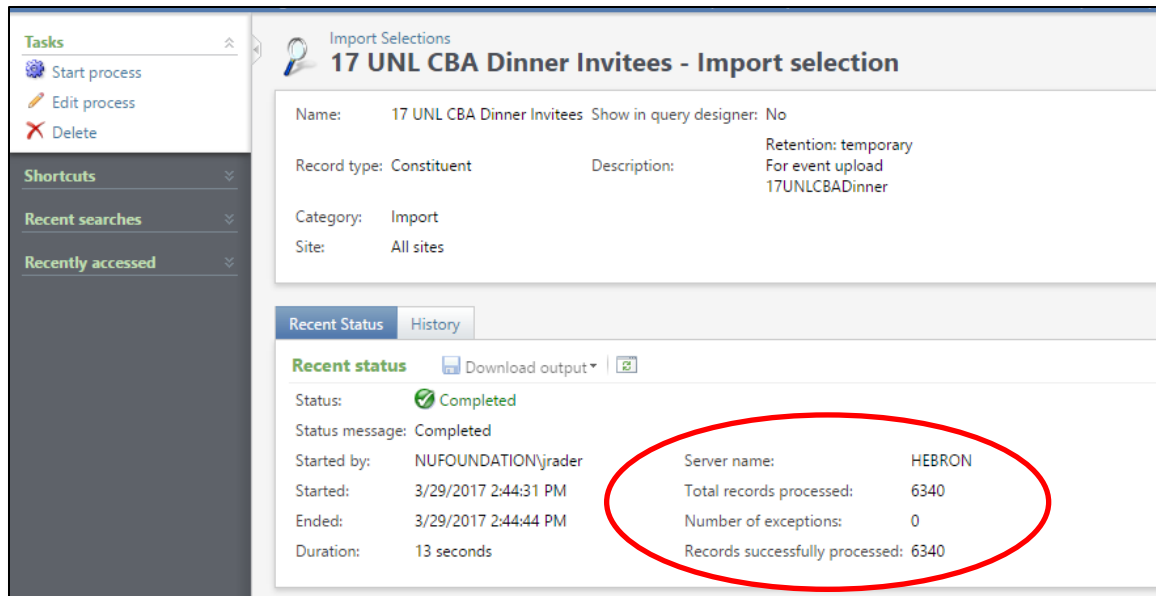6. Choose the **Import File.**
7. Select the **ID column.**
8. Select the **ID type** that relates to the ID in the ID column.
9. Click **Save** and **Import.**
10. Confirm the number processed matches your intended results.
    a. **Note:** if the numbers do not match, check your CSV for duplicate ID numbers.
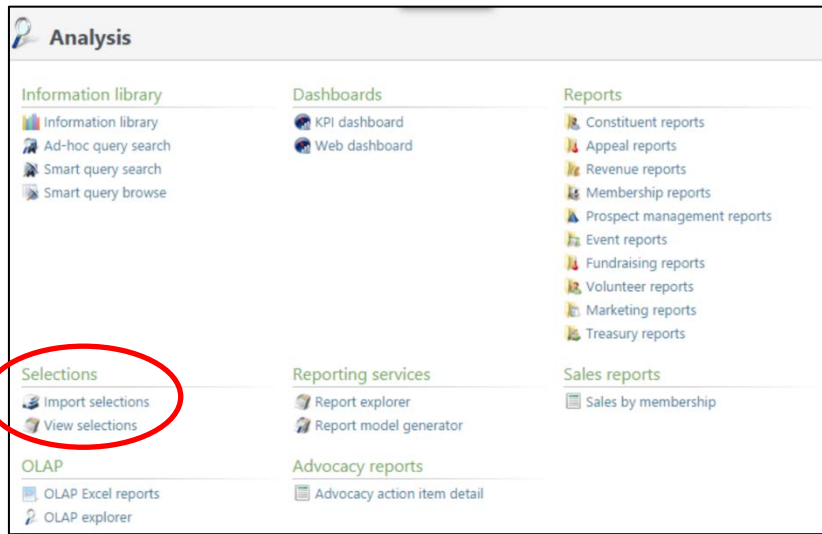
Deleting an imported selection

Once your imported selection is no longer needed, please delete the selection.

Steps to deleting

1. Navigate to the **Analysis** functional area.
2. Click on **Import selections** under the **Selections** area.
3. Expand the details under the selection by using the expand icon.
4. Click **Delete.**

Steps to deleting with visuals

1. Navigate to the **Analysis** functional area.

2. Click on **Import selections** under the **Selections** area.
3. Expand the details under the selection by using the double down.
4. Click **Delete.**