User Manual

Blackboard connect 5

Connect Data Uploader (CDU):

Connect 5, Connect for Teachers, ConnectTxt

Contents

System Requirements

- Windows XP SP2 / Windows Server 2003 and up
- .NET Framework 4.0 (installs during setup)

  NOTE: WPF runtime libraries are included with all versions of Microsoft Windows since Windows Vista and Windows Server 2008. If you're using Windows XP SP2/SP3 and Windows Server 2003, you can optionally install the necessary libraries.
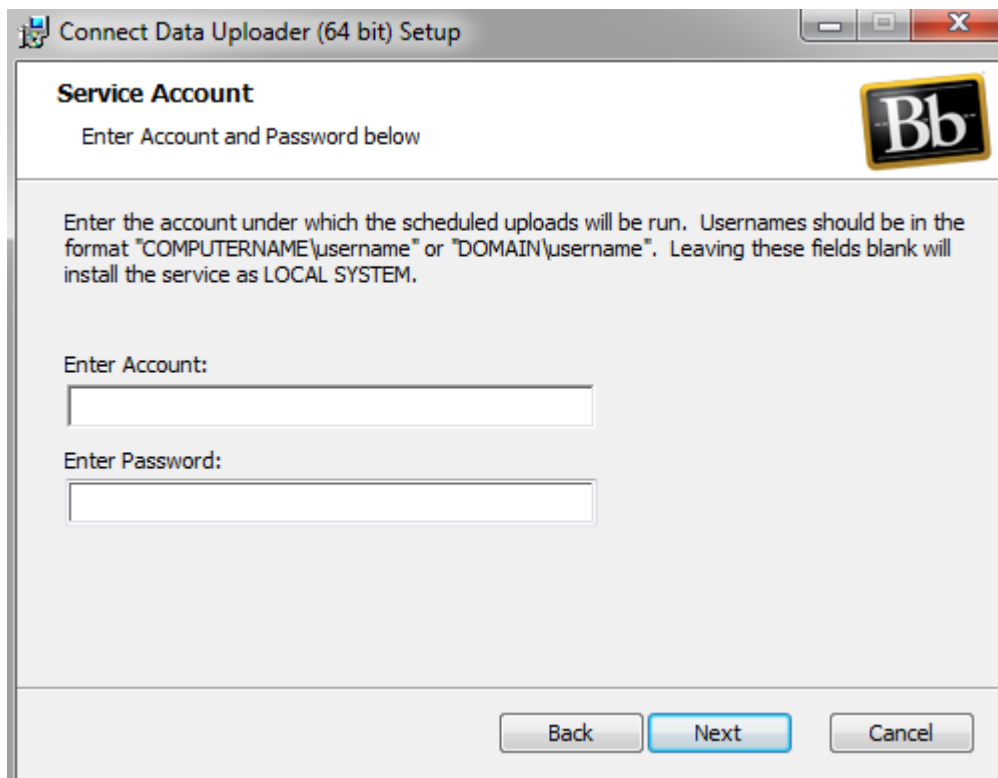
Installation

What You'll Need for Installation

- The Connect Data Uploader installer package. Your Blackboard Connect Integration Specialist will provide you with the download link.

- Your Connect 5 or Connect for Teachers User Name and Password.

- Permission to install programs on your PC/server (see your IT department for more details).

Installing the Blackboard Data Uploader

1. Locate the installer in the Download folder and open it by double clicking on the file.

   - x64.msi – the download file for a 64 bit platform
   - x86.msi – the download file for a 32 bit platform

2. Click **Run** on the Open file Security Warning and follow the on-screen instructions.

3. *Optional:* Provide your windows account name and password at the end of the installation in the given fields. If you do not provide a user name or password, the software will be locally installed.
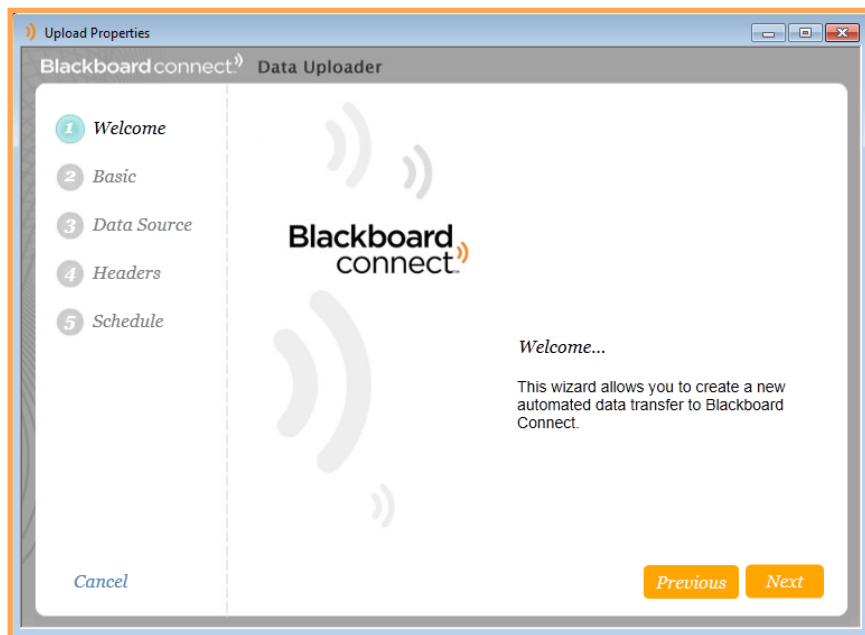

The Installer will install the application to your computer.

Scheduling a New Upload

To schedule a new upload, click "**Create New Upload**" from the options on the left side of the Connect Data Uploader window.
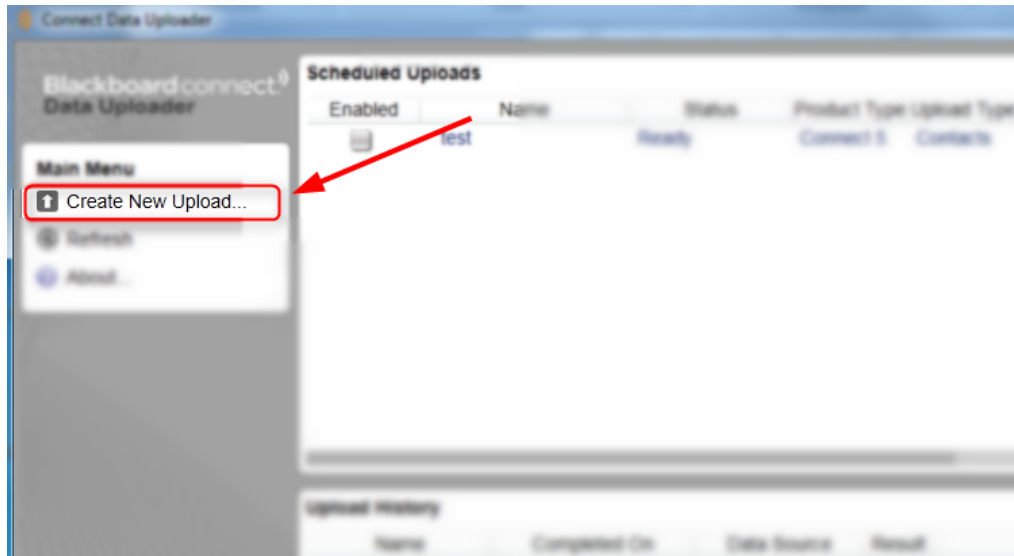
The first screen you will see is a welcome menu. Click **Next** to continue.
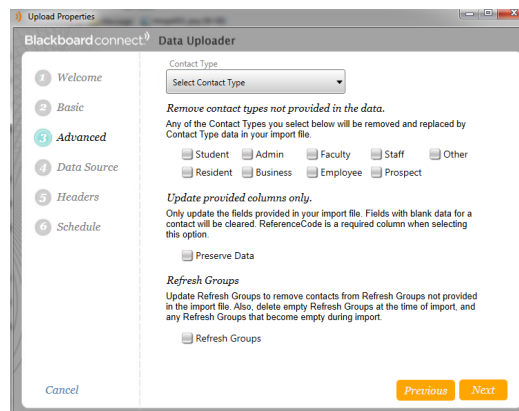
Provide the basic information

Upload Name	Provide a name for your upload. This title will identify your scheduled upload in the User Interface of the upload utility.
Product Type	Select which Blackboard Connect product where you'd like to send your data. *The Data Uploader currently supports Blackboard Connect 5, Connect for Teachers, and ConnectTxt.*
Data Source	Use the pull-down menu to select from: ➢ Delimited Text File- A flat file located on your computer usually in .csv format ➢ Microsoft SQL Server- Accessing a SQL server and utilizing a SQL query ➢ ODBC- Accessing a database management system via DSN and utilizing a SQL query
Upload Type	Choose from the different upload types. In Connect 5, your options are "**Auto Notification**" and **"Contacts"**. 'Auto Notification' is for triggering messages in Connect. 'Contacts' is for updating contact information in Connect such as Student or Staff data. If you're scheduling an upload for Connect for Teachers, your options instead are: ➢ Student ➢ Student/Period ➢ Teacher
Username	Provide your username for your Connect 5 or Connect for Teachers account. You must have permission to upload data and send automated messages.
Password	Provide your password for your Connect 5 or Connect for Teachers account. You must have permission to upload data and send automated messages.

Blackboard connect

NOTE: Auto Notification set ups can skip to page 8. ConnectTxt can skip to page 9. Connect for Teachers set up can skip to page 10.

Upload Type (Contacts)

If you have selected Connect 5 as your product and Auto Notifications, you will need to provide the following advanced information.

|	
Contact Type	From the drop down menu, select the contact type that you will be uploading onto Connect 5. **NOTE:** If you select "All", you must provide the Contact Type column in your data file.
Remove contact types not provided in the data	This should typically match up with the contact type chosen. This indicates to the system that any record that is no longer in your data file should be removed from the system.
Preserve Data: Update provided columns only	By selecting "**preserve data**" checkbox, this indicates to the system that you only wish to update the columns provided in the data file. *For example, If you are not providing WorkPhone in the file, this column will not be updated or removed from the system.*
Refresh Groups	Click the **Refresh Group** checkbox, to remove contacts from a Refresh Group that you didn't provide in the import file. Refresh Groups will be deleted if there are no contacts in the group.

Upload Type (Auto Notifications)

If you have selected Connect 5 as your product and Auto Notifications, you will need to provide the following advanced information:

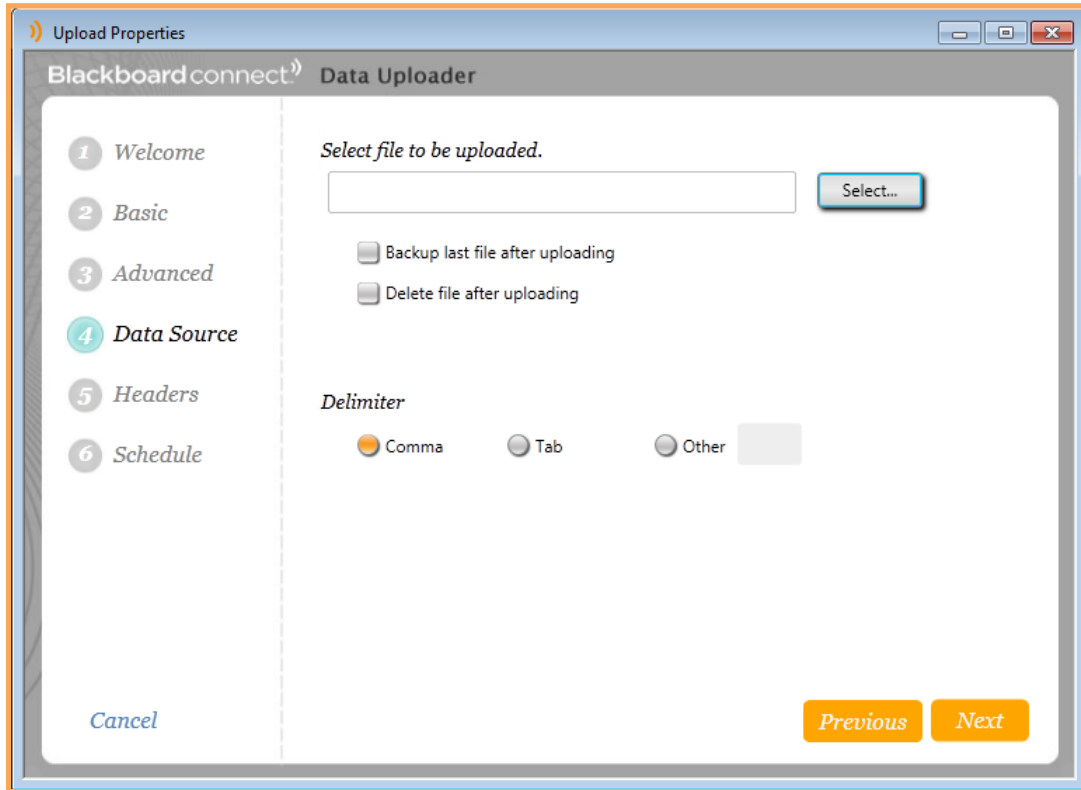| Template Name	Automated messages require Connect 5 templates, which will provide your messages for each of your delivery type (phone, email, sms, etc). You will need to create a template and provide your template name (typed exactly) in this field. *This is a required field.*
Contact Type	Select the contact type you want to import into your Connect 5 account. Select ALL if the contact type is provided in your data file. ➢ All ➢ Student ➢ Admin ➢ Faculty ➢ Staff ➢ Other
Call Time	This is the time the message will be scheduled in Connect.
Time Zone	This should be your time zone.

ConnectTxt

If you have selected **ConnectTxt** as your product, you will see this screen is similar to ConnectTxt. Choose one option on this screen, keep or delete the contacts.
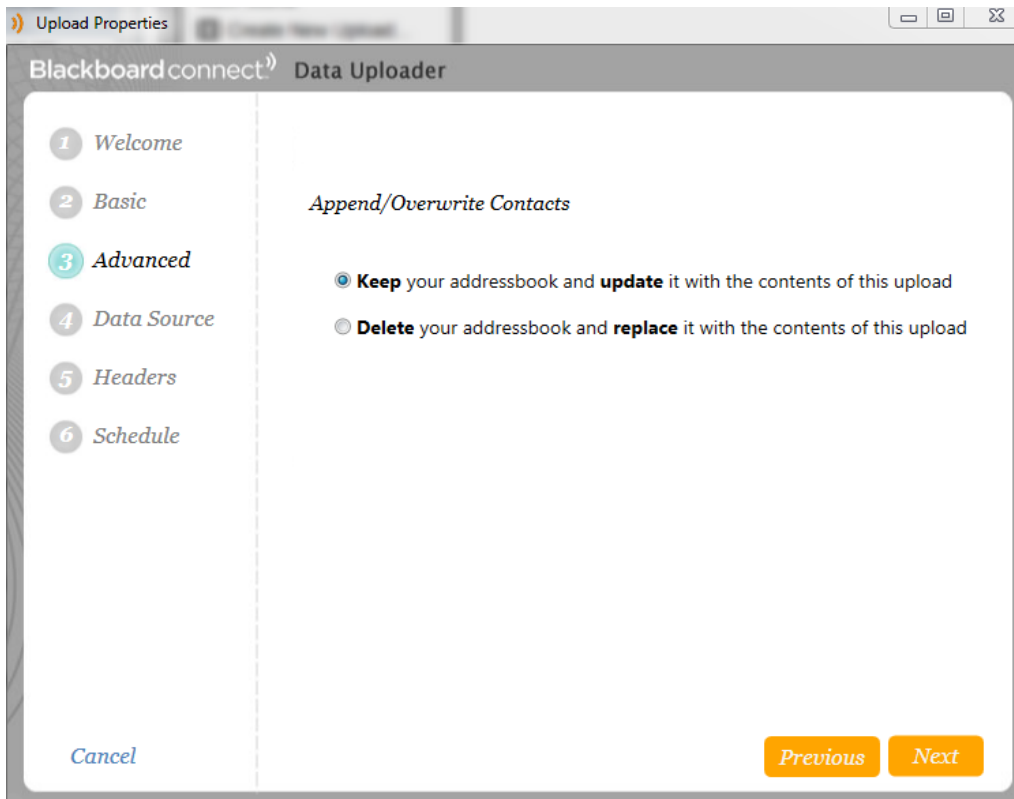
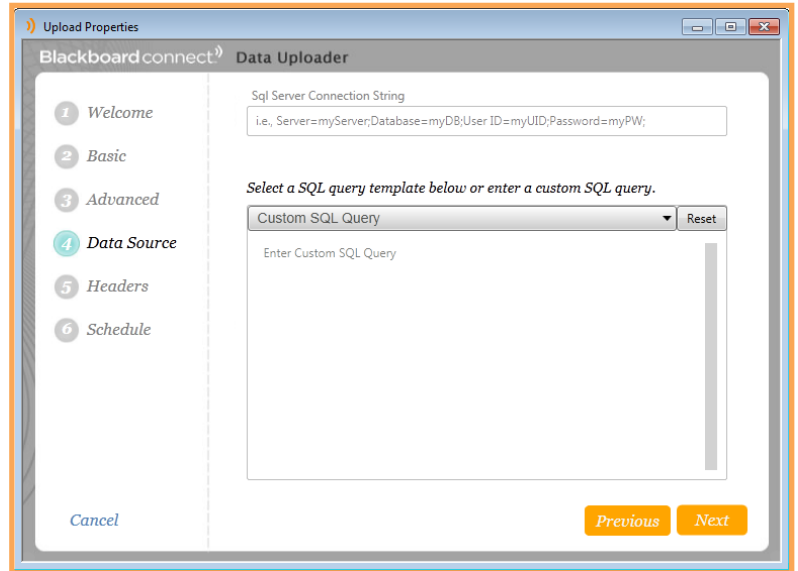| Keep	Keep the address book and update it with the data provided in this file.
Delete	Remove the address book and replace it with the data provided in this file.

Data Source (Delimited Text File)

If you have selected a **delimited text file** as your data source on the Basic window, you will need to provide the following advanced information:

Select file to be uploaded	Click the Select button to locate your properly formatted delimited text file from your computer. Additionally, you can select to: ➢ Backup last file after uploading ➢ Delete the file after uploading
Delimiter	Specify what type of delimiter you are using in your file. The most common are comma delimited and tab delimited files.

Data Source (Microsoft SQL)

If you have selected Microsoft SQL as your data source on the Basic window, you will need to provide the following advanced information:

| SQL Server Connection Screen	Enter your SQL server connection string in this blank. Here is one example:
	Sever = "" ; Database = ""; UserID = ""; Password = "";
	In the quotes ("") enter the respective inputs for each field.
Select an SQL query templates below or enter a custom SQL query.	Choose your database and contact type from the dropdown menu. This will list the correct SQL query to use.
	Connect 5 queries are: "SIS – Upload Type"
	Connect for Teacher queries are: "SIS – C4T – Upload Type"
	If you have a different query that is either not listed or different from the one provided, select "**Custom SQL Query**" and manually enter your query.

Data Source (ODBC)

If you have selected ODBC as your data source on the Basic window, you will need to provide the following advanced information:

DSN	Select your DSN using the drop down menu. You can select to use windows to authenticate access to your DSN or enter the DSN username and DSN password. This is based on how your DSN was set up the ODBC Data Source Administrator. *The DSN must be set up first.*
DSN Username	Enter the Username of your DSN *(if not Windows Authenticated)*
DSN Password	Enter the Password of your DSN *(if not Windows Authenticated)*
Select an SQL query template below or enter a custom SQL query.	Choose your database and contact type from the dropdown menu. This will list the correct SQL query to use. Connect 5 queries are: "SIS – Upload Type" Connect for Teacher queries are: "SIS – C4T – Upload Type" If you have a different query that is either not listed or different from the one provided, select "**Custom SQL Query**" and manually enter your query.

Headers

This page allows you to specify the headers to use to import to Connect 5 or Connect for Teachers. On the left side, you will see the headers from your data file or query. On the right side, you will choose from the drop down menu the appropriate Connect header that matches up to your data.
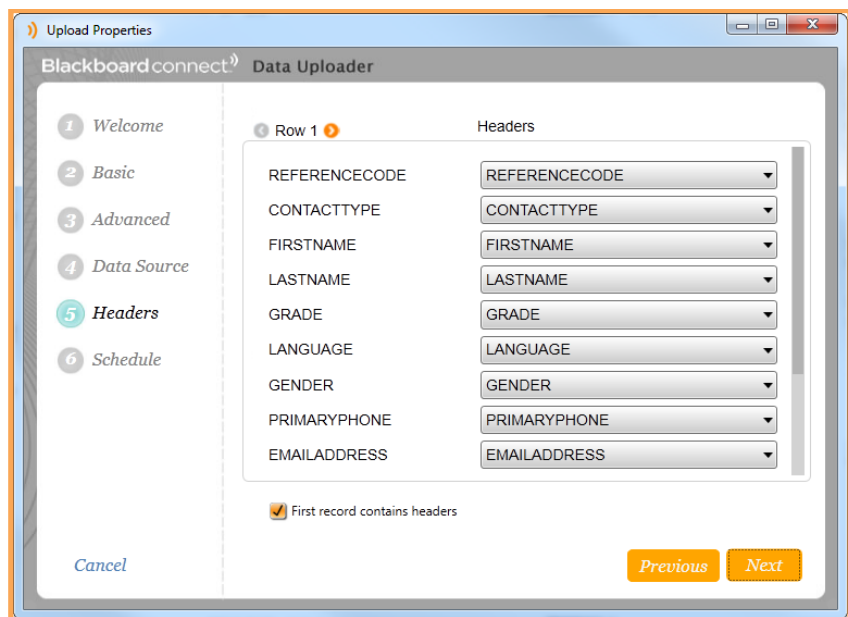

If your headers already match the Connect required header fields, then the CDU will automatically map them.

If your headers do not match the Connect required header fields, you will see the right column show a red "Ignore" header. You will need to choose the appropriate header from the drop down menu on the right.

For Contact imports, to omit columns in your data file use the **Ignore** option in the dropdown list and the Connect Data Uploader will not import the data in the specified column.

For Auto Notifications, **Ignore** can also be used for your custom flex field(s), but you must have a header in your data file and this header must match the Insert in your template in Connect.

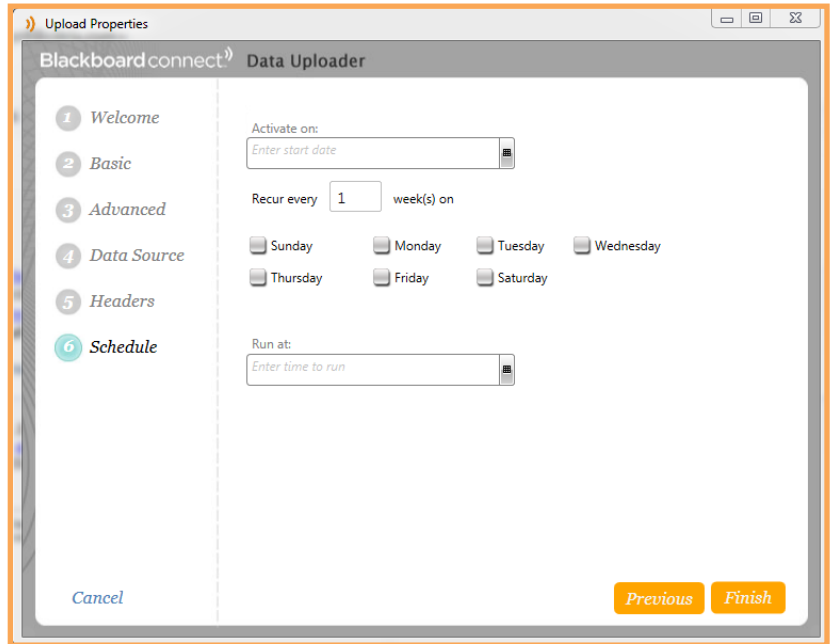If your first record does not contain headers, uncheck this box.
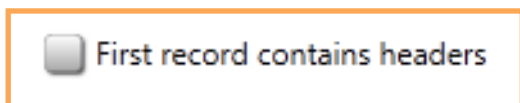
Schedule (Contacts and Auto Notifications)

The Schedule screen is where you'll specify the time you want your data automation will run.

This is when the file is actually transferred to Connect.

For Connect 5 Auto Notifications, this is NOT when the message will go out in Connect. This is when the data will be sent to Connect. You have already scheduled the 'Call Time' on a previous screen (page 8). The 'Run At' time should be before your 'Call Time'.

Activate on:	Enter the date the upload will start to occur. Alternatively, you may select the icon to the right so bring up a visual calendar of the month.
Recur every:	Finally, select the frequency and specific calendar days the upload is set to occur. For daily imports, the frequency should be set to 1 week and all days should be checked. For M-F imports, the frequency should be set to 1 week and only Monday, Tuesday, Wednesday, Thursday, and Friday should be checked.
Run at:	Enter the time the upload will occur. Alternatively, you can select the icon to the right to bring up a list of time you may select. This must be in the following format XX:XX PM ex: 11:59 PM. *You are not limited to running these on the hour. You may enter 10:45pm or anytime you wish.*

Options for Your Upload

Once you've scheduled your data transfer, the schedule will appear in the Connect Data Uploader's main window. From this screen you can view and select additional options by selecting your scheduled upload choosing an option from the left side navigation pane.
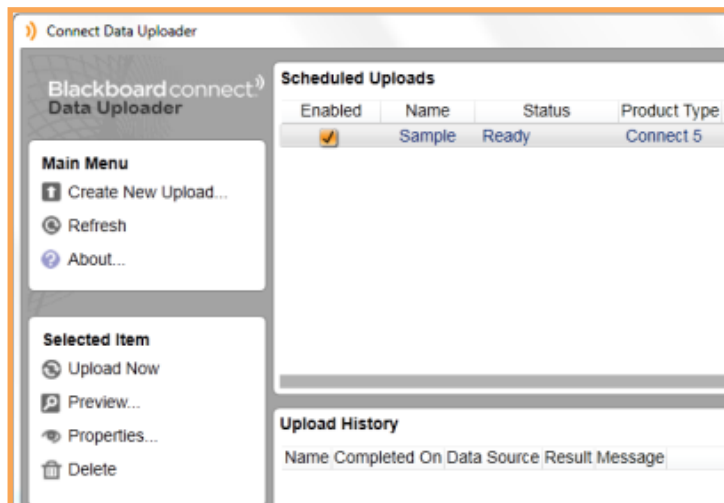
Selecting a scheduled upload will list the following four options:

1. **Upload Now**: This option will send the information in the upload to the server immediately.
2. **Preview**: This option will show you the current information that is scheduled to be uploaded.
3. **Properties**: This option will bring you back to page 1 of "**Upload Properties**" which allows you to review and make changes to the way an upload is set up.
4. **Delete**: This option removes the selected upload. This option does NOT delete the input source file.

To the left of the name of the Upload is "**Enabled**". If this button is not selected, the Upload will not be sent at the time specified. This allows you to quickly choose to enable or disable a specific upload.

Upload History will display previous imports and their results. If you have multiple scheduled uploads, you can click on a specific one to see the upload history for only that upload.

Notes and Known issues

Installation

During the setup, you will be prompted to enter an account to run the Windows Service. This is provided as an option to enter an account or rather installs the service under your LOCAL SYSTEM, which will be fine most of the time.

However, if you have configured an ODBC using Windows Authentication to connect to their ODBC, the service will need to run under the same account in order to access the ODBC.

Service:

The Connect Data Uploader service may not start after the initial installation of the tool. This may affect the way your data uploads or may prevent automation of occurring all together. If you are having issues with uploading a task, please make sure the "Connect Data Uploader" service has started.

To do this:

- Click the Start (or Windows) Menu.
- In the search bar, type: "services" and select the **Services** program in the search results.
  Alternatively, you can open your Control Panel and select: **System and Security → Administrative Tools → Services.**
- Right click on "Connect Data Uploader" and select "Start."

Flex Fields:

If a column is set to IGNORE, we will still pass the column with the original header. This way the client will be able to use their original header as the new custom flex field value by leaving the column set to IGNORE.

Failed – Authorization Failed:

If you see that you are getting a failed upload with an authorization failed error,

The most common cause of this issue is that you do not have the proper permissions to access multiple levels. You will need to make sure the Connect user that was used in the setup has permission to access multiple levels. The following user roles are recommended: Auto Imports Only(Top), Data Manager(Top), and Attendance Only(Top).

Queries:

Some of the queries will need customizations from you. These queries for contact imports are: Blackbaud – Students (Phone Types), CSIU – Students, MMS – Staff (School Year), MMS – Students (School Year), ParishSOFT (School Year), Senior Systems – Students (School Year), TIES – Staff (District Number), TIES – Students (District Number and School Year).

For attendance imports, most of the queries will need to be checked to ensure it is using the attendance code you prefer. We tried to make the queries standard, but every school is different and may not use the same absence codes.

Other notes:

* Logs for this application can be accessed in the Event Viewer. (Open Event Viewer -> Windows Logs -> Application)

* Configured upload files and backups are stored as XML at this location:

Vista/Windows 7

C:\ProgramData\Blackboard\Connect\Data Uploader

C:\ProgramData\Blackboard\Connect\Data Uploader\Backups

Windows XP

C:\Application Data\Blackboard\Connect\Data Uploader

C:\Application Data\Blackboard\Connect\Data Uploader\Backups

Default installation paths:

C:\Program Files\Blackboard\Connect\Data Uploader

C:\ Program Files (x86)\Blackboard\Connect\Data Uploader

Contacting Client Care

If you have any questions regarding the information in this manual, you can contact us 24 hours a day, 7 days a week. Also check out our new support website **Behind the Blackboard**, where you can find more information about Connect's special features as well as share ideas with other schools and institutions.

Phone Support: **1-888-599-2720**

Email Support: **connectsupport@blackboard.com**