

CREATING GROUPS IN ARISTOTLE 360

Creating Groups in Aristotle 360

Use these instructions to add groups to Aristotle 360 so contribution information can be quickly pulled for an entire group of individuals at any time. This is commonly done for committees to check participation throughout the year.

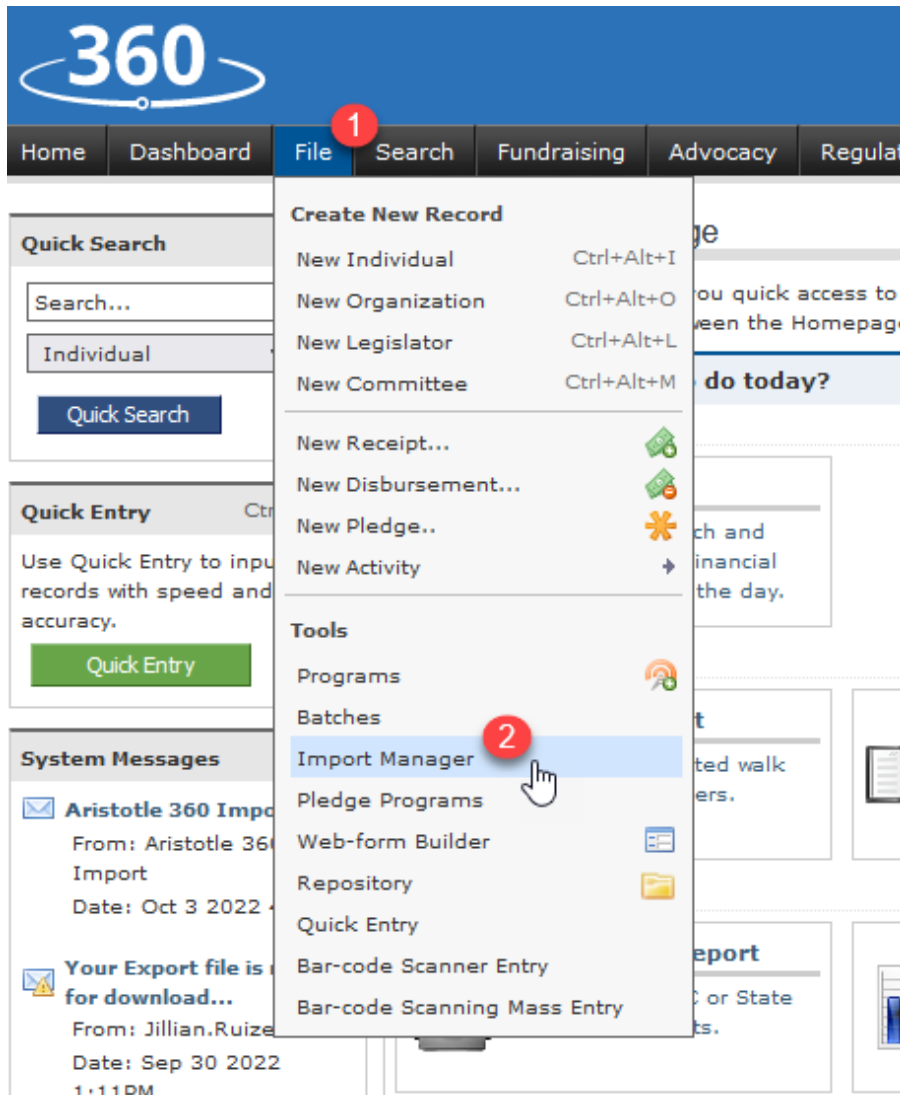
Prior to following these instructions, you need to have the Member IDs for each individual in the group saved in an excel document. The acceptable excel formats are .xls (Excel 97-2003) and .csv. If you are importing multiple groups, you will need one excel file per group.

Below is an example of a spreadsheet that is ready for import. This example has the member IDs and names. The only information required is the Member IDs. All other information will be filtered out during the import process.

E6	✕	✓	<i>fx</i>	
	A	B	C	
1	Member ID	First Name	Last Name	
2	149002980	Diana	Bingham	
3	206520936	Polly	Blackwell	
4	144004489	Sheryl	Bowden	
5	143001023	Paul	Bruce	
6	145510777	Allison	Cahill	
7	148500919	Linda	Cedarblade	
8	144034718	Riley	Cilley	

Starting the Import:

From the Aristotle 360 home screen, go to File > Import Manager

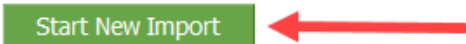


From the Import Manager screen, click Start New Import

Import Manager

 The **Import Manager** allows you to select from your recent record imports and re-import new data.

START NEW IMPORT (WITH NEW SETTINGS):



Select Your Data File:

- 1) Click Browse and select the file to be imported. (Helpful hint: Name your excel file what you plan to name the Group in Aristotle 360. It should always begin with the current year.
Example: 2022 BOD. For simplicity, this should also be the import title.)
- 2) Type Import Title
- 3) Choose Federated Group
- 4) Click Next

Aristotle 360 Import Wizard
This wizard allows you to import a list of individuals, organizations, committees, transactions and other related records.

STEP 1: SELECT YOUR DATA FILE...

Select the source file that contains the data you wish to bring in and describe the file and data types.
- View our [Sample Preformatted Files](#) for examples on how to setup your import file(s). The maximum supported file size for a single import file is 50MB.

1

Browse....

Source File: 2022 BOD.xls
(Max File Size: 50MB)

Import Type: Individual **Leave as Individual**

2 Import Title: 2022 BOD **Group name for Aristotle 360**

3 Federated Group: Arizona AOR
AZ - (1385)
AZ - (1395)
AZ - (1400) **Choose your association ID**

☒ First row contains column headings. (Not valid for .DBF files)
Leave this checked if your import file includes headings

4 Next Cancel

Confirm Your File:

In this step, you are shown a preview of your import group. Click Next.

Aristotle 360 Import Wizard
This wizard allows you to import a list of individuals, organizations, committees, transactions and other related records.

STEP 2: CONFIRM YOUR FILE...

Confirm that your source data is properly formatted, is being accurately interpreted by the import wizard, and that the number of records is accurate.

Import Name: 2022 BOD

Source File: 2022 BOD.xls

Source File Type: XLS

Destination Data Type: Individual

Number of Records: 18

FILE PREVIEW:

Member ID	First Name	Last Name
149002980	Diana	Bingham
206520936	Polly	Blackwell
144004489	Sheryl	Bowden
143001023	Paul	Bruce
145510777	Allison	Cahill

FILE OPTIONS:

Start at Line: 1 of 18

Previous Next Cancel

Map Your Data Points:

This is where you will map the data to the Aristotle 360 database. The **Source Preview** column will automatically display the information from the first row in your list. Go to the column that has the Member ID. That is the only column you will do anything with.

- 1) Under **Field Data Type**, select Basic Info
- 2) Under **Destination Field**, select Source ID for the line with the Member ID
- 3) Click Next

Aristotle 360 Import Wizard

This wizard allows you to import a list of individuals, organizations, committees, transactions and other related records.

STEP 3: MAP YOUR DATAPOINTS...

Map each of the fields from your source data file to a corresponding field in the database. You may choose not to import selected fields.

Import Name: 2022 BOD

Source File: 2022 BOD.xls

Destination Data Type:  Individual

DATA MAPPING:

Source Column	Source Preview Line 1	Field Data Type	Destination Field	Default Email
(1) Member ID	149002980	Basic Info 1	Source ID 2	
(2) First Name	Diana	-- Do not Import --		
(3) Last Name	Bingham	-- Do not Import --		

3 Previous Next Cancel

Assign to Groups:

This is where you will create a category, if not already done, and add your group name. The category is where you put all of your groups. Categories only need to be created once.

About Categories:

- For Local Associations, your category is your State abbreviation with your Local Association name or abbreviation. Example: for Tucson Association of REALTORS® in Arizona, your category could be AZ-Tucson or AZ-TAR.
- For State Associations, your category is the name of your state. E.g. California.
- For NAR, most of the categories have already been created, but a new category can be created if needed.

For this process, you will only be using Step 4A shown in the image below.

Aristotle 360 Import Wizard

This wizard allows you to import a list of individuals, organizations, committees, transactions and other related records.

STEP 4A: ASSIGN TO GROUP

Assign the records from your source data file to a group or to multiple groups. You may use existing groups in the system, create new groups, or use data from your source data file to assign the groups. This step is optional.

☐ Add All Imported to Below Selected Groups

☐ Import Groups From Source

STEP 4B: ASSIGN TO LIST

Assign the records from your source data file to a New List. This step is optional.

To create a **new** Category, type the new Category name into the Box to the left of Add New Category, then click the Add New Category button.

STEP 4A: ASSIGN TO GROUP

Assign the records from your source data file to a group or to multiple groups. You may use existing groups in the system, create new groups, or use data from your source data file to assign the groups. This step is optional.

☐ Add All Imported to Below Selected Groups

☐ Import Groups From Source

To select the Category, click the box for Add All Imported to Below Selected Groups. This will populate a dropdown box with all the categories you can choose from, including any you may have created in the prior step.

STEP 4A: ASSIGN TO GROUP

Assign the records from your source data file to a group or to multiple groups. You may use existing groups in the system, create new groups, or use data from your source data file to assign the groups. This step is optional.

☒ Add All Imported to Below Selected Groups

Group Category:

Group:

☐ Import Groups From Source

Next, you will add your Group. If you are importing your list to add to an existing group, you can choose the existing group name from the Group dropdown. If this is a new group, type the group name in the box to the left of Add New Group, then click the Add New Group button.

STEP 4A: ASSIGN TO GROUP

Assign the records from your source data file to a group or to multiple groups. You may use existing groups in the system, create new groups, or use data from your source data file to assign the groups. This step is optional.

☒ Add All Imported to Below Selected Groups

Group Category:

Group:

☐ Import Groups From Source

Choose the name of the Groups from the dropdown and click Next.

STEP 4A: ASSIGN TO GROUP

Assign the records from your source data file to a group or to multiple groups. You may use existing groups in the system, create new groups, or use data from your source data file to assign the groups. This step is optional.

Add New Category **Add New Group**

☒ Add All Imported to Below Selected Groups

Group Category:

Group: **1**

☐ Import Groups From Source

+ Add to another group

STEP 4B: ASSIGN TO LIST

Assign the records from your source data file to a New List. This step is optional.

Add New List

2

Previous **Next** **Cancel**

Record Matching:

Select the criteria as shown below, then click next.

Aristotle 360 Import Wizard

This wizard allows you to import a list of individuals, organizations, committees, transactions and other related records.

STEP 5: RECORD MATCHING...

Select options for importing new and updating the existing records. Also make sure to select how the import procedure should match that data.

ADDING NEW

- ☐ Create
Non-Existing
Individuals

- ☒ Ignore
Non-Existing
Individuals

UPDATING EXISTING

- ☒ Update Individual Info

- ☐ Do Not Update Individual Info

MATCHING CRITERIA

- ☐ First Name, Last Name, Source ID
- ☐ First Name, Last Name, Address Line 1
- ☐ First Name, Last Name

- ☒ Source ID

- ☐ Voter ID

- ☐ First Name, Last Name, Address Line 1, Zip5

- ☐ First Name, Last Name, Zip5

- ☐ Personal Email

- ☐ Work Email

ADDRESS VALIDATION

- ☐ Validate
address with
latest district
information.

SOURCE ID

- ☒ Add Padding to Beginning of Source ID
Character to be appended to Beginning of Source ID

Enter the number of characters that make up your entire
source ID

Input the number 9 since Member IDs are 9 digits

Previous **Next** **Cancel**

Final Step:

Enter your email address into the box for Email Notification, then click Finish.

Aristotle 360 Import Wizard
This wizard allows you to import a list of individuals, organizations, committees, transactions and other related records.

FINAL STEP...
Clicking the Finish button will start the import procedure. Please make sure to save your settings if you will reuse the same data structure later on. Also make sure to type in your email address, so we can send you a detailed report about your import.

SAVE SETTINGS:
Save As (Name): [Save Settings](#)
Description:

EMAIL NOTIFICATION:
Send Email to:

[Previous](#) [Finish](#) [Cancel](#)

An address validation box will pop up. Choose Continue with Current Preference.

Address validation has not been selected so your addresses will not be standardized for ZIP+4 or apply legislative boundary data

[Enable Address Validation](#) [Continue with Current Preference](#)

Next a dialogue box will pop up to let you know that the import has started. Click OK.

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The import procedure has started. You should receive an email as soon as it is done processing all the data.

[OK](#)

You will receive an email from Aristotle 360 with the status of the import once it has completed. This can take a few minutes.