

LYNX Location and Organization Import

LYNX lets you import basic data from your student information system to create locations and organizations in 25Live and keep them updated. Using this feature, you can rest assured that 25Live will stay in sync with your SIS whenever you change a location's capacity or rename a department.

Newly created locations and organizations use the [Default Object Security and Assignment Policy](#) configured in Series25 Group Administration.



What about duplicates?

Most schools have already filled 25Live with locations and organizations prior to implementing this import process. You may be concerned about creating duplicates or overwriting data.

LYNX will work around objects that were not created by this import, even if they meet the criteria for an extract set. When an object in the extract set has the same name as one that already exists in 25Live, LYNX will skip it and not create a duplicate or update any data on the original, including data such as capacity (if a location has had a UID conversion, which CollegeNET staff can help with). If a location matches, but may be a duplicate, LYNX may also flag the location as a "Native Location."

Future improvements will allow you to "convert" previously created objects in 25Live. This will not affect any event data, but it will allow LYNX to update locations and organizations as if they were imported and not created separately.

Getting Started

Importing locations and organizations with LYNX both follow the same basic procedure:

1. Make sure you've set all [configuration settings](#) to your liking, including:
 1. [Define Location Assignments](#) to determine whether locations are identified by facility ID or building/room code
 2. [Define Primary Organization](#) to determine whether organizations are identified by subject or department code

Institution codes in organization names

If your Define Primary Organization setting includes appended institution codes, there is an [additional configuration step](#) required after creating your extract set. You will need to choose which institution codes should be used for that extract set.
 3. [Organization Type](#) to set the 25Live organization type for imported orgs
 4. [Filter Data By Institution Codes](#) if you are a Campus Solutions school with multiple institutions that should be kept separately
2. [Create](#) an extract set to determine which objects from your SIS should be imported
3. [Review and import](#) the extract set to create the objects in 25Live with basic information from your SIS

Once you get this far, you're ready to import classes. Locations and organizations will be added to them with just the minimum information provided by LYNX, but the details you flesh out in later steps are what make 25Live shine!

Adding More Details

The import only affects a few basic fields in 25Live, just the bare minimum to create a location or organization:

Locations	Organizations
Name	Name
Formal Name	Title
Capacity	Type

Consider:

- Editing other details (such as [location features](#) and [organization partition preferences](#)) within 25Live
- Editing [security permissions](#) in the Group Administration tool
- Importing updates with the [Series25 Data Import Tool](#)

These details will be preserved if LYNX updates 25Live.

One excellent way to fill in a large number of location or organization details efficiently is to use the [Import Template Reports](#) in 25Live. Follow these steps:

1. Import locations and/or organizations as described above
2. In 25Live, run the corresponding Import Template Report for those objects to list them in an Excel spreadsheet
3. Fill out the spreadsheet with additional data as described in the Series25 Import Tool Help section
4. Upload the spreadsheet using the Import Tool

Making Further Updates

Once you create an extract set for locations or organizations, it behaves just like any other extract set. You can leave it active and let LYNX automatically detect changes in the SIS, or you can manually trigger updates any time you want. Both processes are described on [Importing or Exporting an Extract Set](#).

Location and organization extract sets will carry data from your SIS to 25Live, but never the reverse: it's a one-way street. Your SIS is the system of record for this data, so initiate all your changes there.