

Jonas Export for Roster Sync

2016 - Winter Edition

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Overview

This guide reviews how to pull a **member roster file** from **Jonas** to import it into the website **Directory** using **Roster Sync**.

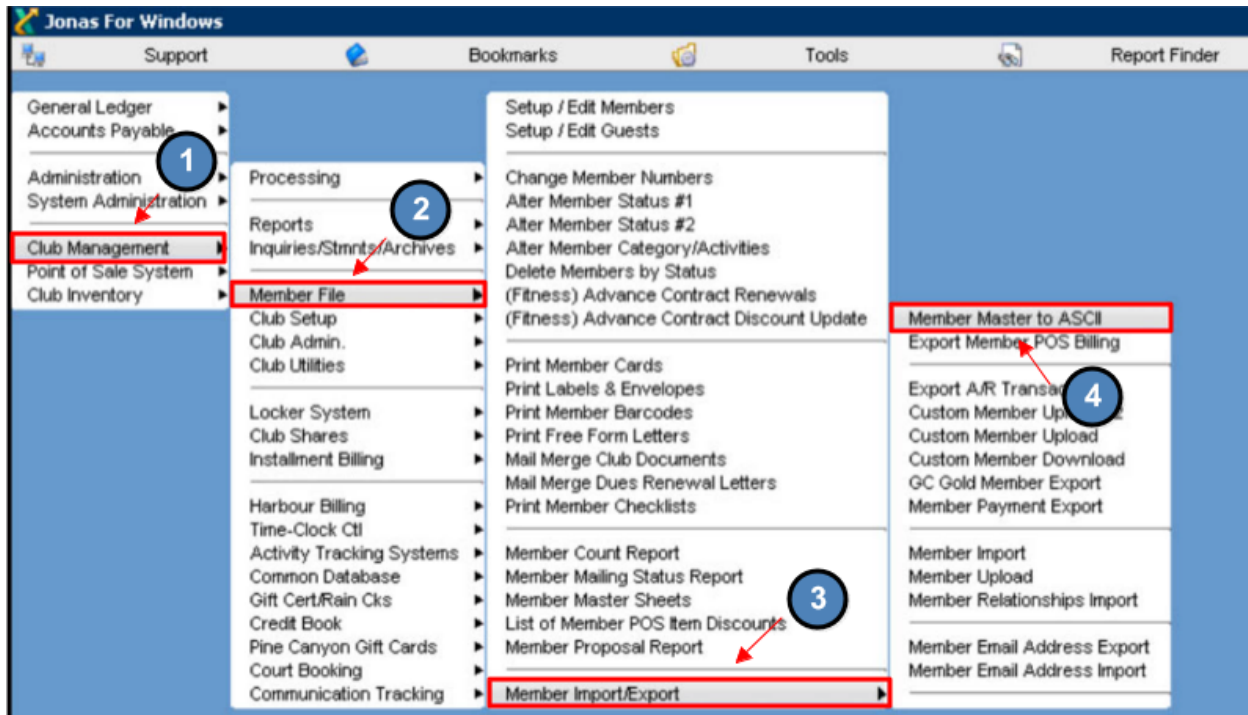
Use Case(s)

Each time your **online member directory** needs to be updated, the **member roster file** must be pulled from **Jonas** and uploaded to the website using **Roster Sync**.

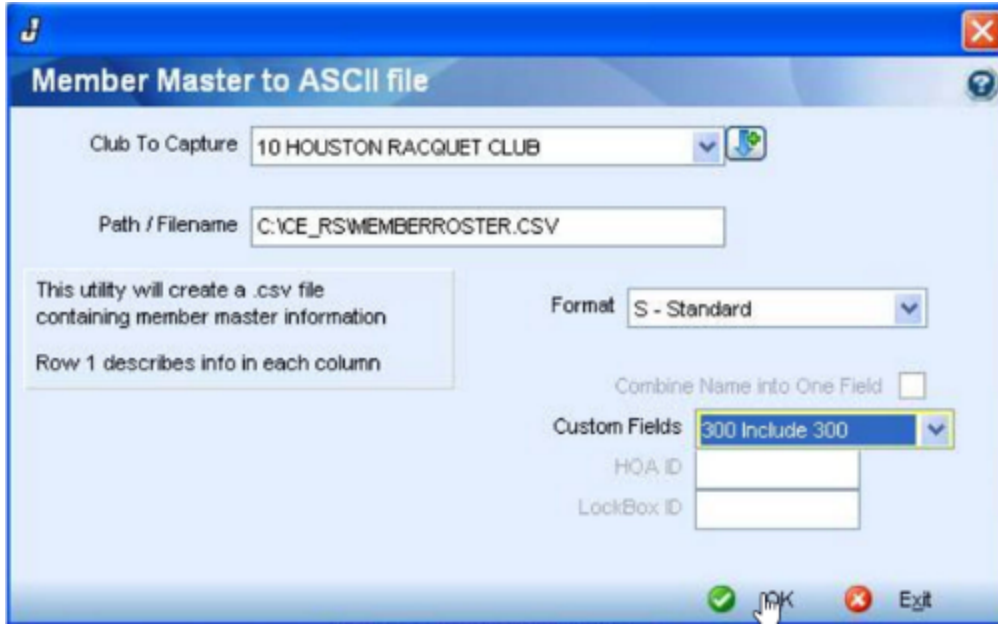
Pulling Jonas Member File

Access your **Jonas Club Management Application**.

Click on **Club Management > Member File > Member Import/Export > Member Master to ASCII**.

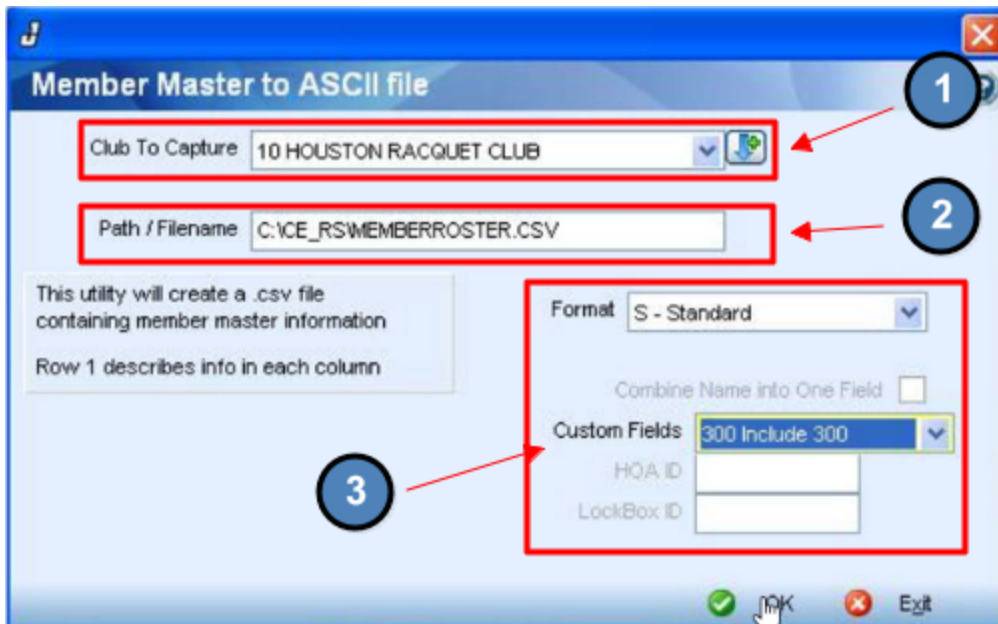


A pop-up window will then appear with **export options**.

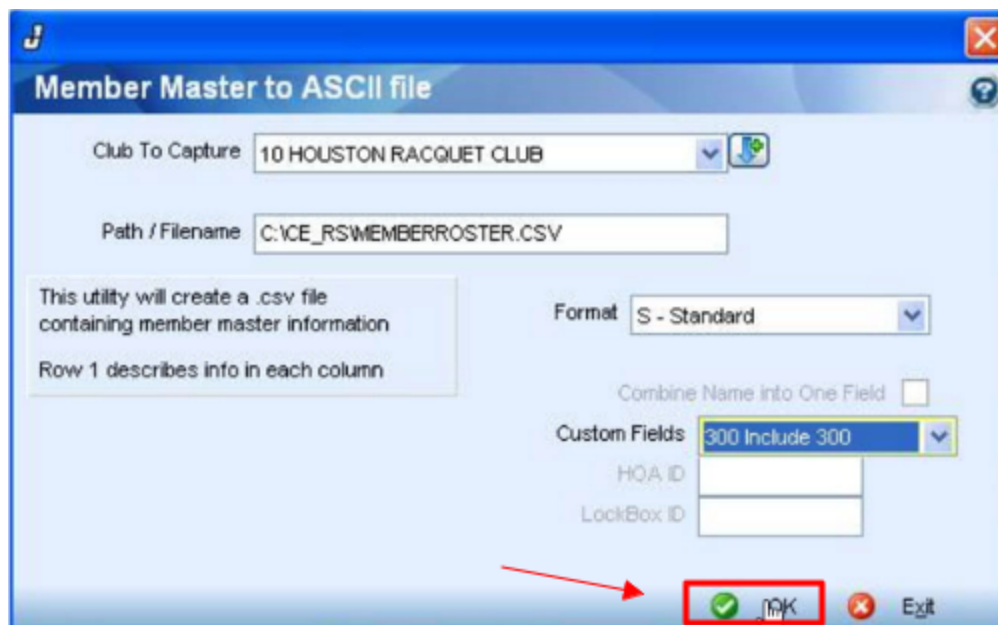


The pop-up will list:

1. Your Club Name
2. Where the Export will Save to your computer
3. Field Settings



Click **OK** to run the export.



Once the process is complete, you can then run the **Roster Sync** utility to import the member list into the website.

FAQs

Q: The **export** I generated is missing members, what happened?

A: If the export settings were altered in any way, this could result in not pulling the correct information which may cause missing members in the export. Contact Clubessential Support to review the proper settings. Before making any changes to the export settings, be sure to consult with Clubessential Support first.

Best Practices

1. Before you run the **Jonas Export**, it is best to contact your IT Company that manages the server that **Jonas** is running on. Since the **Jonas export** must be run from a computer at the club and the statement data must be extracted from the server using Gofer, setting up a time to speak with the IT Company managing the server will expedite the process, and help to prevent delays in getting the install finished.
2. Make sure to check the Filename path for where the export will be saved so you can easily retrieve this when you're ready to run **Roster Sync**.