

# Bulk person import

This page primarily allows the import of new person records, but can also be used to bulk update certain information for existing records. A file (in a particular format) can be uploaded and can contain a mixture of new (that have no ID supplied) and existing (that have an ID supplied) person records.

New records are added to the person list, whereas existing records are modified. A number of data validation rules must be satisfied before data is changed.

## Generate Import Template

This section allows you to generate an import template file in the correct format - that may optionally include current data to update.

### Bulk Person Import ?

#### Generate Import Template

##### Template field options

☐ Custom Fields for role: 

Select Subrole(s)...

☐ Registration Field

☐ Participant Roles Field

☐ Team Field

##### Template Preview: Fields and validation rules

These are the import rules relating to the selections you have made above. If you change your selections of roles or custom fields, click the Refresh button. Custom fields listed here (from parent associations) that have disabled edit-access for child admin users, will not be present in the download.

Different fields are mandatory dependent on the role(s) being imported, make a selection from the listbox below and click refresh to see what is required. Role(s):

Select Subrole(s)...

Refresh

ID	FIRST NAME	MIDDLE NAME	LAST NAME	ADDRESS1	ADDRESS2	ADDRESS3	SUBURB	POSTCODE	STATE	COUNTRY
Mandatory for existing records	Mandatory for new records	Optional	Mandatory for new records	Optional	Optional	Optional	Optional	Optional	Optional	Optional

The downloaded file will be in a format (tab separated format with header) that can be modified and re-imported.  
Any records that aren't being modified should be removed from the downloaded file.

##### Participant filtering options

☒ Include Participant Data

Template field options	<ul style="list-style-type: none"><li><b>Custom Fields for role:</b> Tick this if you want to import custom fields - the file will contain column to store additional information. By default, only standard fields are imported/updated. These relate to (some of the) information that can be edited via the Personal Details tab of the <a href="#">Edit Person Record</a> screen. If the Import Custom Fields option is checked, then custom field data can also be imported/updated. These are fields defined under the People...Person Custom Fields menu item. Custom fields can be defined by an organisation or its parent organisations, and fields can be restricted to only apply to certain Person Roles and/or sub roles. Custom field information can also edited via the Custom fields tab of the Person Edit screen.</li><li><b>Registration Field:</b> Tick this if you want to import registration information - the file will contain columns to store registration data e.g. registration type.</li><li><b>Participant Roles Field:</b> Tick this if you want to import participant roles - the file will contain columns to store assigned roles e.g. junior, senior.</li><li><b>Team Field:</b> Tick this if you want to import information about team e.g. team name.</li></ul>
Template preview: Fields and validation rules	<ul style="list-style-type: none"><li>Any records supplied without an ID are treated as new records. However, validation checks are carried out when importing to make sure duplicate records are not created.</li><li>Records supplied with IDs are treated as updates. Checks are carried out to make sure the record can be updated. Any changes to first and last names are ignored, as these can only be done by individually editing each person record.</li><li>When importing/updating custom fields, the CSV format cannot be used, and the file MUST have a header row.</li><li>There are limits to the maximum number of records that can be imported in one batch - see below.</li></ul>

#### Participant filtering options

- **Include Participant Data:** Tick the checkbox to download data of those who already exist in the system in case of updating data in bulk.
- **With Role:** Select the Role, Sub-Role to filter the participants.
- **Registration Status:** Select registration status filter options (e.g. Parent Org, Period and Registration Type, or Period and Type, depending on your level).

Click the **Download import file template** link, and save the file to your hard disc. The file will be in tab delimited format with a header row.

You will need to review the file and fix the information in case of updating in bulk. In case of importing new records, you will need to enter the information in the correct formats and validations rules.

- Open the file - recommend in Microsoft Excel. Each data field should be in a separate column. If using a text format such as CSV/TSV, and opening in Excel, care should be taken that Excel does not convert text columns that look like numbers (e.g. mobile phone numbers) to numbers that may result in loss of information. Consult the Excel help on how to import text documents and override the data types of certain fields.
- Remove records (rows) in the file that you do not wish to change by deleting the entire row. If you are importing only new records, then delete all rows except for the headings.
- If importing/updating custom fields, then you can remove custom fields you don't want to import/update. For example, if the template you downloaded includes 4 custom fields, and you only want one, then delete the other 3 custom field headings, and data relating to these, for all rows of information. If importing custom fields, the Import Custom Fields checkbox must be checked, otherwise any custom fields present in the import file will be ignored.



Do not remove any Standard Field information or headings from the import file.

- Change the appropriate information for existing records (if any). First and last names cannot be changed by this process, and changes to these fields will be ignored.



You may be able to copy and paste from existing data files you may have.

- Add the appropriate information for new records (if any). For new records, first and last names must be specified and the ID field must be blank.
- Save the file in Excel (or text) format.

## Generate Helper Files

This is optional. You only need to download helper files if you want to import certain custom information, for example, roles, registration type and participant team lists. The helper file will provide you with a list of correct roles, names, team names and registration types to fill in the import file for both existing and new records.

## Generate Helper Files

### Generate Lookup Fields Helper File

☐ Participant Role List



☐ Registration Type List for:

☐ Participant Team Lists



Download helper lookup file

## Upload the import file

## Upload

### Import Options and Defaults

Field Options: ☐ Import Custom Fields For Subrole(s)...

Data Updating (for existing records): ☐ Overwrite ALL data ☒ Only overwrite missing data

Default Person Role: Select Subrole(s)...

Registration ☒ Register To:  Period:

### Select spreadsheet file to import

Select the file to import, the file type, then click the Import button to get a preview of the data import.

**The maximum number of records that can be imported in one batch is: 1000**

[Choose A File...](#)



Worksheet Name: Sheet1 (leave blank to use the first worksheet)

[Upload And Preview](#)

### Preview

\*\* : Person does not have required role to update custom field.

[Re-Upload File](#)

[Import Data](#)

## Data Updating (for existing records)

These options determine the behavior when updating existing records from the import file. It is not relevant for importing new records.

- **Overwrite ALL data**



Use with care! Any blanks in the import file will be written, which could lead to loss of data.

Example:

Home phone	Work phone	Mobile phone	
Value for Player X in database	9399 9999	9488 8888	0411 11111
Value for Player X in import file	9877 7777	(blank)	0411 11111
Value for Player X in database after file is imported	9877 7777	(blank)	0411 11111

- **Only overwrite missing data** - only fields that have been provided in the import file AND are missing from existing data will be written. This option means that you can leave fields blank in the import file without overwriting existing data.

Example:

	Home phone	Work phone	Mobile phone
Value for Player X in database	9399 9999	9488 8888	0411 11111
Value for Player X in import file	9877 7777	(blank)	0411 11111
Value for Player X in database after file is imported	9877 7777	9488 8888	0411 11111

## Default Person Role

A Role and at least one sub role must be selected. This only affects new person records.

- These roles are added to any new records. Existing records do not have their roles modified.



The [Bulk Change Roles](#) screen can be used to change roles of existing records

- If the **Import Custom Fields** option is checked, then custom fields that apply to these roles can be imported.

## Registration

Tick the Registration box if you want to register people as part of the import process.

Un-tick the Registration box if you do not want to register people as part of import process.

## Importing the data

Once all options have been selected, including the file to import, click the **Upload and Preview** button. The system will validate your choices, and if import is possible, a preview screen will display. This screen lists data for the records present in your import file, and gives an indication of what the values of each field will be after the import.



Note: No import has occurred at this time. Each row is colour coded to give an indication of the actions that will take place.

<b>LIGHT GREEN</b>	A new record which will be added to your person list.
<b>LIGHT PURPLE</b>	An existing record which will be modified in your person list.
<b>WHITE</b>	An existing record which has no changes, and will not be modified.
<b>RED</b>	A record which has an error, and will not be imported/modified. This may be due to the creation of a duplicate record, failure of various validation checks, or the fact that the organisation may not have the access to edit an existing record.

At the Preview screen, you can click the **Re-upload file** to make changes to the import file and reload into the Preview screen.

Once you have reviewed the data in the Preview screen, click the **Import Data** button to save your changes to the database. Any records that have been marked as in error (in red) will be skipped. Once imported, changes cannot be undone, although data can be re-imported, and/or individual records can be edited in the usual way. A final confirmation screen displays after import that indicates the import status of each row with colour-coding, the same as in the Preview screen.

## Other important notice

### Import file formats

Files can be imported in any of the following formats:

- Microsoft Excel (97 onwards) Excel (97 onwards) file:
  - The data can be in any Worksheet within the imported workbook, however the name of the Worksheet containing the data must be specified exactly in the Worksheet Name text box (this is **case-sensitive**). Alternatively, leave this field blank to automatically use the first worksheet in the workbook.
  - The Worksheet must contain data for standard fields in columns 1 to 19 as per the Field order specified below. If custom fields are being imported, these are supplied in columns 20+ onward. However, most data is optional, and does not need to be supplied in each column.
  - Header row - a row containing the field names. Field names in the header row for standard fields are ignored. If custom fields are being imported, the field name as obtained from the downloaded template must not be changed.
  - If data is not available for a particular field for a record, leave the appropriate cell empty.
  - Use one row per record - ID numbers must not be repeated. Use as many rows as required and leave all subsequent rows blank.



Note: If removing rows of data from Excel, make sure that the row is deleted rather than just clearing the cell contents. Even though the rows may look empty, Excel sometimes considers there to be data in to cells that can affect the import. If the import is giving problems and the data looks correct, try saving the Excel file as a CSV or TSV file, and trying to import in that format.

- Comma separated values (CSV) separated values (CSV) file:
  - Note: CSV format cannot be used if importing Custom fields.
  - This is a file with each row on a new line, and values within each row separated by commas.
  - Header row - a row containing the field names. Field names in the header row for standard fields are ignored.
  - If data is not available for a particular field for a player, a comma 'placeholder' must be used. For example - the following is a placeholder between A and B: A,,B,C.....
  - Use one row per record - ID numbers must not be repeated. IDs must not be repeated. Use as many rows as required. Each row must have a total of 16 commas, corresponding to 17 fields.



Note: If there are commas in the data (e.g.) in an address field, this format cannot be used. In this case convert to Excel or TSV format.

- Tab separated values (TSV) separated values (TSV) file:
  - This is a file with each row on a new line, and values within each row separated by tabs.
  - Header row - a row containing the field names. Field names in the header row for standard fields are ignored. If custom fields are being imported the field names obtained from the downloaded template must not be changed.
  - If data is not available for a particular field for a player, a tab 'placeholder' must be used. For example - the following is a placeholder between A and B: A<tab>B<tab>C..... where <tab> refers to a tab character.

- Use one row per record - ID numbers must not be repeated. IDs must not be repeated. Use as many rows as required. Each row must have a total of 16 tabs, corresponding to 17 fields.



Note: Data downloaded by clicking the Download import file template link will be in tab delimited format, with a header row.

### Import Field order and validation rules:

Further information about whether a field is mandatory, and the allowable values can be found within the \_Required file format and validation rules\_ table which displays during the import process. The same validation rules apply irrespective of whether records are added/modified using the bulk import process, or manually editing records one by one using the person edit screen.

Field number	Abbreviation	Definition	Allowable values
Standard fields	-	These fields MUST be supplied, in this order, and the header/field name (if provided in the import file) is ignored.	
1	ID	The person's ID. This is a 7 digit number that can best be obtained by generating an import template (see below). * If the ID is specified, any data - except the last name and first name* - for the record will be updated. However, the ID must belong to a person within your list (either with or without current roles)*. <b>In some cases the person may be present in your list, but not be editable (this could be the case for certain transfers between clubs etc). You will not be able to change these records.</b> * <b>First/Last names can only be changed by editing the individual record.</b> *Roles of existing records are not changed by this process. * If the ID is left blank, then a new record will be created, and an ID assigned after the import process.	Integer- leading zeroes are ignored, or left blank.
2	First Name	The person's first name. For existing records any changes to this field are ignored. Must be supplied for new records.	Text
3	Middle Name	The person's middle name(s) (or initial).	Text
4	Last Name	The person's last name/surname. For existing records, any changes to this field are ignored. Must be supplied for new records.	Text
5 6 7	Address1 Address2 Address3	Person's street or postal address. Use as many of these as required.	Text
8	Suburb	Suburb, or city/town related to address.	Text
9	Postcode	Postcode/zipcode related to address.	Text
10	State	State (or county) related to address.	Text
11	Country	Country related to address.	Text
12	Date of birth	Date of birth for person. Allowable formats: d/m/yyyy (eg 3 April 1963 is 3/4/1963), yyyy/m/d (eg 1963/4/3), formats such as Apr 3, 1963 also allowable. Hyphens (-) may be used instead of slashes (/). Please use the full year (1963 instead of 63) and avoid the US style m/d/yyyy format.	Date format as listed.
13 14 15	Home work mobile phone	Phone numbers for person. Mobile phone numbers should be specified as they would be called from your country - avoid international and other codes.	Text
16	Email address	Email address for person. Recommended. Must be a valid email address. Multiple addresses can be entered by separating with a semi colon (;) - e.g.: <a href="mailto:fred@example.com">fred@example.com</a> ;fred@work.com	Text
17	Gender	Preferably enter M or F. Anything starting with M or F is accepted, anything else ignored.	Text
18	Next of Kin / Emergency Contact - Name		Text
19	Next of Kin / Emergency Contact - Number		Text
Custom fields		These fields MUST follow all standard fields. Order is not important, but the header/field name as obtained from the downloaded template must not be changed. Custom fields that are not required to be uploaded/modified can safely be removed/omitted from the import file, and any data in such fields will not be changed within the system.	
20+	Custom Fields - as many as required.	Text	*Custom fields are only imported if the Import Custom Fields option is checked.