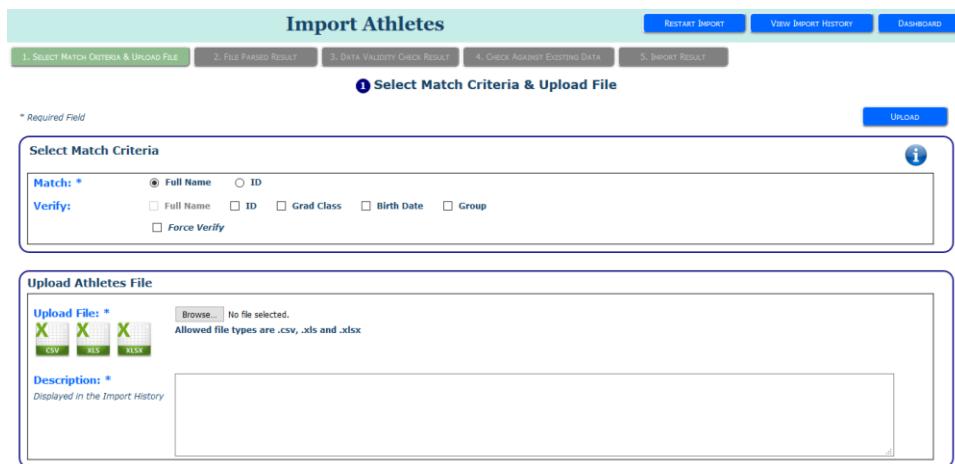


SWOL SPREADSHEET IMPORT FEATURE

CSMi is pleased to announce a major update to SportsWareOnLine allowing you to import spreadsheets of athlete data into your database.

1. You can upload CSV, XLS, or XLSX spreadsheets.
2. You can specify which fields SportsWare will use to match athletes in the spreadsheet to athletes in your database.
3. SportsWare automatically updates matching athletes and add non-matching athletes.
4. SportsWare checks your spreadsheet for invalid data, e.g. a birthdate of 1/3/2312. (It happens).
5. SportsWare generate a report showing the status of each record imported from your spreadsheet.
6. And the best news is, SportsWare keeps a log of the imports so you can undo an import if you find there was a problem with your data. (Yes, that also happens).



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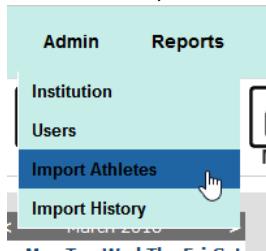
Documentation/Instructions

1. *CSMi document “200195 Importing an Excel Spreadsheet of Athlete Data to SportsWareOnLine” lists the fields which can be imported into SportsWare.*
2. *CSMi document “200327 SportsWareOnLine FamilyID Instructions” contains instructions on exporting and importing FamilyID data.*
3. *Click the **INFO** button from the Import page to display a copy of this document.*



Accessing the Excel Import

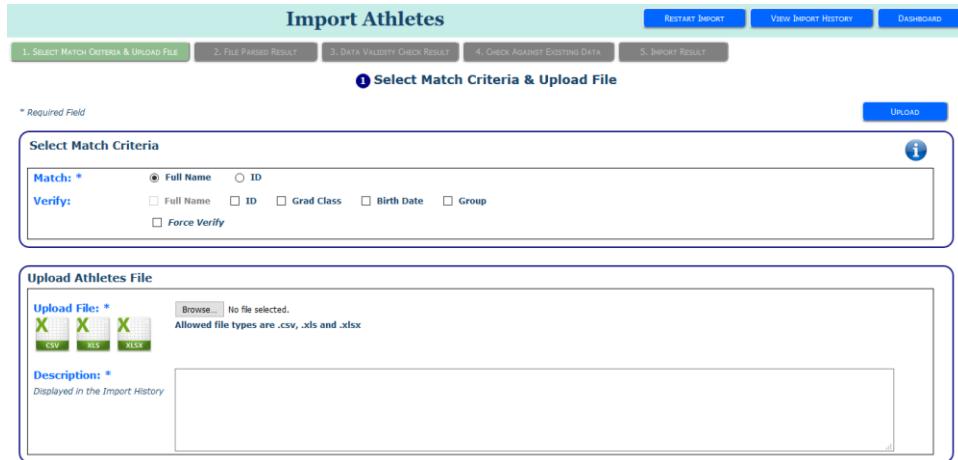
You will see two new options under the **ADMIN** menu, **IMPORT ATHLETE** and **IMPORT HISTORY**.



MENU	DESCRIPTION
IMPORT ATHLETES	Upload and import a spreadsheet of Athlete demographic data.
IMPORT HISTORY	The history of the athlete imports.

Importing a Spreadsheet

1. From the **ADMIN** menu, select **IMPORT ATHLETE**.
2. SportsWare displays the Import Athlete page.



The screenshot shows the 'Import Athletes' page with the following interface elements:

- Header:** Import Athletes, RESTART IMPORT, VIEW IMPORT HISTORY, DASHBOARD.
- Progress Bar:** 1. SELECT MATCH CRITERIA & UPLOAD FILE, 2. FILE PARSED RESULT, 3. DATA VALIDITY CHECK RESULT, 4. CHECK AGAINST EXISTING DATA, 5. IMPORT RESULT.
- Section:** ① Select Match Criteria & Upload File.
- Match Criteria:** Match: Full Name, ID. Verify: Full Name, ID, Grad Class, Birth Date, Group. Force Verify.
- Upload Athletes File:** Upload File: * (CSV, XLS, XLSX), Browse... (No file selected), Allowed file types are .csv, .xls and .xlsx.
- Description:** Description: * (Displayed in the Import History).
- Buttons:** UPLOAD, i (info icon).

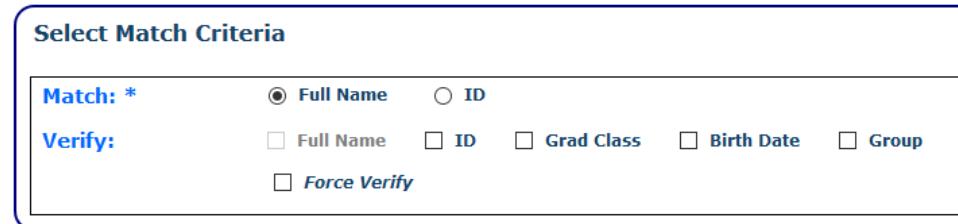
Note: SportsWare displays the Import progress as you move through each step. You can click the progress buttons to return to a previous step.



The screenshot shows the 'Import Athletes' page with the following interface elements:

- Header:** Import Athletes, RESTART IMPORT, VIEW IMPORT HISTORY, DASHBOARD.
- Progress Bar:** 1. SELECT MATCH CRITERIA & UPLOAD FILE, 2. FILE PARSED RESULT, 3. DATA VALIDITY CHECK RESULT, 4. CHECK AGAINST EXISTING DATA, 5. IMPORT RESULT.
- Section:** ④ Result of Check Against Existing Data Based on Match Criteria.

Match Criteria



The screenshot shows the 'Select Match Criteria' section with the following interface elements:

- Section:** Select Match Criteria.
- Match:** Match: Full Name, ID.
- Verify:** Verify: Full Name, ID, Grad Class, Birth Date, Group. Force Verify.

The Match Criteria tell SportsWare how to combine the imported data with your existing SportsWare database. There are three main areas to select:

CRITERIA	DESCRIPTION
MATCH FIELD	This is the primary field SportsWare will use to match your athletes. The options are Full Name or ID.
VERIFY FIELDS	Because you can have multiple athletes with the same name, e.g. Smith, John, SportsWare allows you to specify additional fields (FULL NAME, ID, GRAD CLASS, BIRTH DATE, GROUP) to match.
FORCE VERIFY	When FORCE VERIFY is checked your database must contain data in the VERIFY field. When FORCE VERIFY is unchecked your database may contain data in the VERIFY field or may be blank.

Here are some examples to help explain the matching.

Full Name Only

This option is typically used in the following situations:

1. Your spreadsheet does not contain any of the verify fields.
2. You are matching on ID which would be unique across your athletes.

Your SportsWare database contains the following records:

Lastname	Firstname	Birthdate	GradClass
Smith	John	12/20/2002	
Smith	John	1/15/2001	
Smith	John		

You are importing a spreadsheet with the following records:

Lastname	Firstname	Birthdate	GradClass
Smith	John	12/20/2002	

You specify to match on FULLNAME only.

Match Full Name ID
Verify Full Name ID Grad Class Birth Date Group
 Force Verify

In this case SportsWare will look for any records where the athlete's full name is "Smith, John". Since there will be two matches, SportsWare will report this and the record will be skipped because SportsWare cannot determine which Smith, John to update.

Full Name and BirthDate

This option is typically used in the following situation:

1. Your spreadsheet contains some of the verify fields.

Your SportsWare database contains the following records:

Lastname	Firstname	Birthdate	GradClass
Smith	John	12/20/2002	
Smith	John	1/15/2001	
Smith	John		

You are importing a spreadsheet with the following records:

Lastname	Firstname	Birthdate	GradClass
Smith	John	12/20/2002	

You specify to match on FULLNAME and verify on BirthDate.

Match	<input checked="" type="checkbox"/> Full Name	<input type="checkbox"/> ID			
Verify	<input type="checkbox"/> Full Name	<input type="checkbox"/> ID	<input type="checkbox"/> Grad Class	<input checked="" type="checkbox"/> Birth Date	<input type="checkbox"/> Group
	<input type="checkbox"/> Force Verify				

In this case SportsWare will look for any records where the athlete's full name is Smith, John and their birthdate is 12/20/2002 or blank. Since there will be two matches, SportsWare will report this and no update will be performed because SportsWare cannot determine which Smith, John to update.

Note: You can select multiple VERIFY criteria to narrow-down the matches.

Full Name, BirthDate, Force Verify

This option is typically used in the following situation:

1. Your spreadsheet contains some of the verify fields and your database contains data for the fields you are verifying.

Your SportsWare database contains the following records:

Lastname	Firstname	Birthdate	GradClass
Smith	John	12/20/2002	
Smith	John	1/15/2001	
Smith	John		

You are importing a spreadsheet with the following records:

Lastname	Firstname	Birthdate	GradClass
Smith	John	12/20/2002	

You specify to match on FULLNAME, verify on BirthDate and FORCE VERIFY.

Match Full Name ID
Verify Full Name ID Grad Class Birth Date Group
 Force Verify

In this case SportsWare will look for any records where the athlete's full name is Smith, John and their birthdate is 12/20/2002. Since there is only one match, SportsWare will update the matching record.

Why not select FORCE VERIFY every time?

Remember, if there is no match, SportsWare adds a new record. When you select **FORCE VERIFY** if there is not a match, SportsWare will add a new record. So, if your SportsWare database only contains the following record:

Lastname	Firstname	Birthdate	GradClass
Smith	John		

and you FORCE VERIFY on BirthDate SportsWare will add the imported Smith, John as a new athlete. We chose this because we want to error on the side of adding a duplicate record rather than updating the wrong athlete record.

Upload File

Upload Athletes File

Upload File: *

Description: *

Displayed in the Import History

SWOL Data Import.xlsx
Allowed file types are .csv, .xls and .xlsx

2018 Athlete Data - Fall Season

To upload your data file:

1. Click the **BROWSE...** button.
2. Windows will display the **FILE UPLOAD** dialog box.
3. Select your spreadsheet and click the **OPEN** button.
4. Enter a description, e.g. "2018 Athlete Data – Fall Season". SportsWare keeps a history of your imports including the description which allows you to quickly refer to previous imports.
5. Click the **UPLOAD** button (located on the right side of the screen).



Parse File

SportsWare will upload your data file, parse it into columns, and look for duplicate athletes based on your **MATCH AND VERIFY** criteria. Notice in the following example, Goodson, Clara is in the spreadsheet twice. SportsWare reports this so you can go back and correct the spreadsheet.

2 Initial Parse Result												
<small>You can not continue import process since</small>												
There are duplicate records in the uploaded file based on the selected base match column and verify column(s).												
Excel File: Duplicate Match Criteria Value												
<table border="1"><thead><tr><th>LastName, FirstName</th></tr></thead><tbody><tr><td>Goodson, Clara</td></tr></tbody></table>											LastName, FirstName	Goodson, Clara
LastName, FirstName												
Goodson, Clara												
Excel Data: 9 Records												
LastName	FirstName	BirthDate	A1_Address1	A1_City	A1_State	A1_ZipCode	ID	Sport1	Sport2	Sport3		
Anderson	Fred	8/23/1963	57 Providence Hwy	Norwood	MA	02062	85498	Baseball (M)				
Buchanan	James	1/24/1970	1600 Pennsylvania Ave	Washington	DC							
Goodson	Clara	9/12/1973	57 Providence Hwy.	Norwood	MA	02062	1212	Field hockey				
Goodson	Clara	9/12/1973	57 Providence Hwy.	Norwood	MA	02062	1212	Field hockey				
Harrison	Steve	9/12/1973					1234	Gymnastics,m				

Why This Typically Happens

As an example, some system list an athlete twice to store a primary and emergency secondary contact. SportsWare utilizes separate columns for the Primary and Secondary contacts. If your export file, has two lines per athlete, you should update the spreadsheet to use a single line and multiple columns.

Continuing with the Import

1. Duplicate records must be resolved before you can continue the upload. Click the **<< BACK TO UPLOAD** button to upload a corrected spreadsheet.
2. After you have corrected the data, click the **NEXT >> DATA VALIDITY CHECK** button.

Data Validation Check

The next step in the import is a data validation check. In this step, SportsWare looks for invalid data. In the following screen, SportsWare highlighted a record where the birthdate was in the year 2973.

3 Data Validity Check Result

There is 1 invalid record.

Invalid Records (1 Record) 

ErrorMessage	LastName	FirstName	BirthDate	A1_Address1	A1_City
The value of the birth date is not a reasonable date.	Goodson	Clara	9/12/2973	57 Providence Hwy.	Norwo

At this point you have two options:

1. Cancel the import, correct the spreadsheet and re-run the import. **Note:** If you click the  SportsWare will download a spreadsheet of the invalid records which you can view.
2. Click the **NEXT >> MATCH CHECK AGAINST EXISTING DATA** button to continue the import and skip the record with the invalid birthdate.

Verify Against Existing Data

The next step in the import is to validate the imported data against your spreadsheet. SportsWare reviews your spreadsheet data against your SportsWare database and reports how many records will be Added as new athletes, how many will be updated as existing athletes and how many cannot be processed because of the following issues:

- There are two athletes in your SportsWare database which match one athlete in your spreadsheet.
- The e-mail/password combination matches a different athlete in your database.

In the following example, Harrison, Steve cannot be imported because we have two athletes with that name and neither of them has a Birthdate stored, so SportsWare can only check their Fullname.

4 Result of Check Against Existing Data Based on Match Criteria																	
# of New Records for Insert: No matching records found. Add the Excel record as a new athlete.	1																
# of Matching Records for Update: One matching record found. Update the existing data with the Excel data.	5																
# of Duplicate Records to be Ignored: More than one matching record found OR Email/Password combo exists. Ignore the Excel record.	1 																
<table border="1"><thead><tr><th>Duplicate</th><th>LastName</th><th>FirstName</th><th>BirthDate</th><th>A1_Address1</th><th>A1_City</th><th>A1_State</th><th>A1_ZipCode</th></tr></thead><tbody><tr><td>Skipped: 2 matching athletes</td><td>Harrison</td><td>Steve</td><td>9/12/1973</td><td></td><td></td><td></td><td></td></tr></tbody></table>		Duplicate	LastName	FirstName	BirthDate	A1_Address1	A1_City	A1_State	A1_ZipCode	Skipped: 2 matching athletes	Harrison	Steve	9/12/1973				
Duplicate	LastName	FirstName	BirthDate	A1_Address1	A1_City	A1_State	A1_ZipCode										
Skipped: 2 matching athletes	Harrison	Steve	9/12/1973														

At this point you have two options:

1. Cancel the import, correct the spreadsheet and re-run the import. **Note:** If you click the  SportsWare will download a spreadsheet of the invalid records which you can view.
2. Click the **NEXT >> IMPORT** button to continue the import and skip the duplicate record.

Finish the Import

The final step is to import the spreadsheet data. At the end of the Import, SportsWare reports “Import Successful”.



You have three options:

1. **RESTART IMPORT:** If you have other spreadsheets you want to import, e.g. you are an outreach program covering multiple high schools.
2. **VIEW IMPORT HISTORY:** Review the results of your import.
3. **DASHBOARD:** Return to the Dashboard.

We recommend you review the Import History.

Review Import History

SportsWare keeps a log of all imported data and allows you to undo an import if you find there were mistakes in your spreadsheet.

Import History									NEW ATHLETES IMPORT	DASHBOARD										
Import Time	Import By	File Name	# Added	# Updated	# Group Changed	# Skipped	# Invalid	Undo Add	Undo Update											
3/26/2018 7:20:22 AM	Rich Petash	SWOL Data Import.xlsx	 	1	6	0	0	1												
Match Criteria																				
Base Match Field: FullName		Verify Fields: BirthDate	Force Verify: No																	
Description																				
2018 Athlete Data – Fall Season																				

The Import History includes the following:

DATA	DESCRIPTION
IMPORT TIME	Date/Time of the Import.
IMPORT BY	Name of the person doing the import.
FILENAME	Name of the Spreadsheet. This also includes three buttons:  Download a copy of the Spreadsheet you imported.  Download a list of each record imported and its status, “ADD”, “UPDATE”, “IGNORED”, “INVALID”
# ADDED	Number of records added to your database as new athletes.
# UPDATED	Number of existing records updated during the import.
# GROUP CHANGED	This is helpful for outreach programs where athletes change schools (Group).
# SKIPPED	Number of records which were not imported because there were duplicate matches in the database.  Click the DOWNLOAD button to download  a copy of the ignored records.
# INVALID	Number of records which were not imported because they had invalid data.  Click the DOWNLOAD button to download  a copy of the invalid records.
UNDO ADD	 Undo all additions, removing any athletes which were added to the import.
UNDO UPDATE	 Undo all updates, returning the athlete records to the values before the import.
MATCH CRITERIA	The MATCH CRITERIA used during the Import.
VERIFY FIELDS	The VERIFY criteria used during the Import.
FORCE VERIFY	Was FORCE VERIFY specified during the import.
DESCRIPTION	The DESCRIPTION entered when the Spreadsheet was uploaded.

Note: If you **UNDO ADD** or **UNDO UPDATE**, SportsWare records this in the History.

Undo Add	Undo Update
Undo by Rich Potash at 3/26/2018 7:22 AM	

Common Spreadsheet Issues

Spreadsheet Errors

Below are some of the common issues we've found when importing users' spreadsheets:

- Using a single column for the Athlete Name, e.g. "Harris, Steve", vs. separate columns for the First Name and the Last Name.
- Using a single column for the Address, e.g. "101 Tosca Drive, Stoughton, MA 02072" vs. separate columns for the **ADDRESS_1**, **ADDRESS_2**, **CITY**, **STATE** and **ZIPCODE** data.
- The parent name and possibly relationship is in one column, e.g. "Tom Potash – Father".
- Putting spaces in the column headings or not using the correct column headings, e.g. "First Name" or " FirstName" vs. "**FIRSTNAME**".
- Data file is not aligned by column, e.g. The import file contains A1_Address1, A1_Address2, A1_City, A1_State, A1_ZipCode and on some records the A1_Address2 is in the A1_City, A1_City in A1_State, etc.
- The Athlete Name spelled differently in SWOL, e.g. Rich Potash in SportsWare and Richard Potash in the import file.

Cleaning-up Spreadsheet Data

Note: Below are some of the Excel functions we've used to clean-up user spreadsheets. We are providing this as a benefit to our users. We cannot provide consulting on Excel functions.

- Typically, names are entered with the first letter capitalized. If your spreadsheet contains different capitalizations, e.g. Potash, SMITH, Harris, you can correct this with Excel's PROPER command.
- If the spreadsheet contains Fullnames in one column, e.g. Potash, Rich you can split the data into separate columns with the Excel DATA, TEXT TO COLUMNS command.
- If the data contains spaces at the beginning or end of your data, e. g. " Potash", you can remove them with the TRIM() command.