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CSV Upload for Events

This guide will assist you in marking attendance for events by uploading a CSV file on the event roster for one-time, multiple session and self-paced events.

Manage Roster

1. Once you click on your event, you will click on the **MANAGE** menu.
2. Click the **IMPORT ATTENDEES** option.

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Import Attendees: One-time and Multiple Session Events

#127514
Another Test Conference Session 1

📅 Date Monday, April 3, 2023 / 🕐 Time 8:00 AM - 9:00 AM

Click the button below to upload your attendee roster file and import it for this event.

🔍 Select File

Please remain on this page until the import process is completed and your roster has been updated.

**Need Help Importing Your File?**   📄 Sample Import File

In order for your import to be successful please review the following tips for a successful import.

1. Only CSV file types can be imported.
2. The first row of the CSV file must be column headers
3. Only include individuals who were in attendance
4. In order to successfully import attendees with potential user accounts, an exact match of one of the following combinations is required:

- Registry ID, First Name, Last Name
- Registry ID, First Name, Email Address
- Registry ID, Last Name, Email Address
- First Name, Last Name, Phone
- First Name, Last Name, Zip
- Email Address, First Name, Last Name
- Email Address, Last Name, Phone
- Email Address, Last Name, Zip

We have provided a sample import file to help identify desired format and structure.

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1. On the import attendees screen, you will find a Sample Import File- you can download that file to fill in for the upload or you can create your own file. **The file must be saved as a CSV file for the upload.** (Please note that you should only add individuals who attended the training on the file for the upload- the system will automatically mark them as attended when they are uploaded.)
2. To begin the import, click the **SELECT FILE** button.
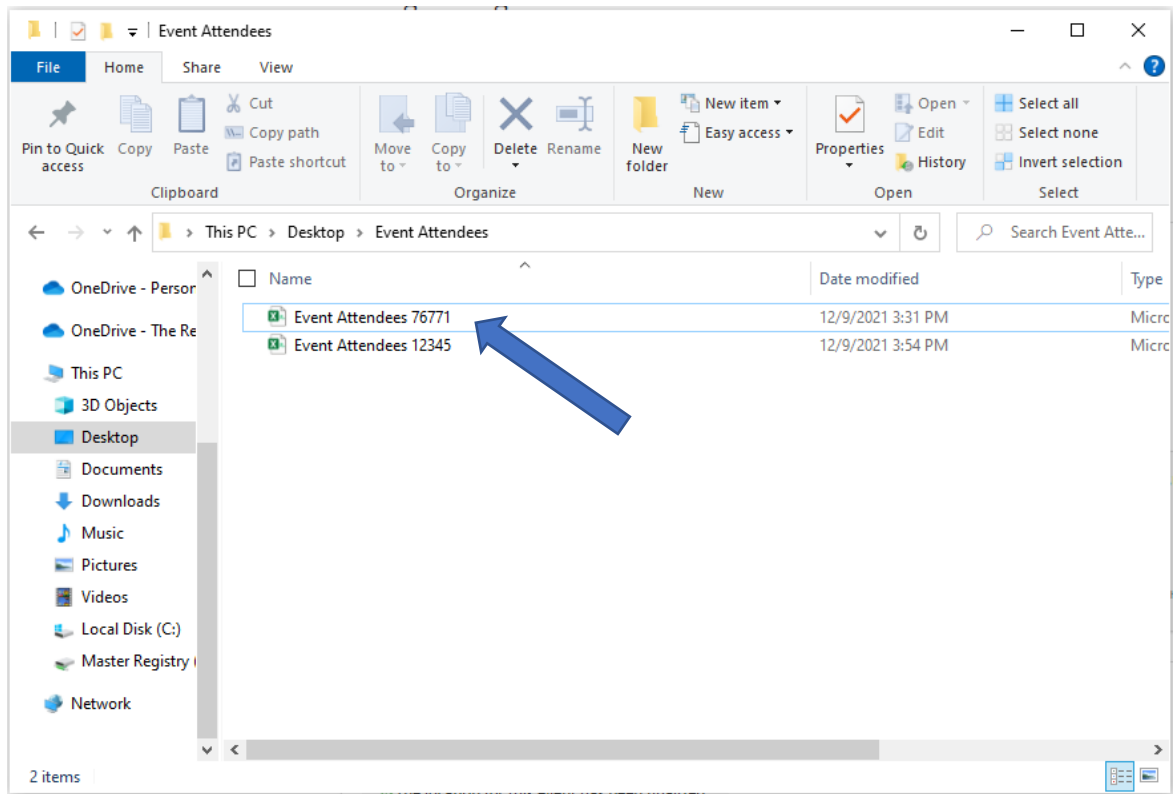
1. From your saved files on your computer, choose the correct CSV file.

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☑ Import Attendees

We have identified the following columns as part of your file upload.

Please review your columns and select the appropriate filed name to associate the data to in order to finish the import.

Imported Field Column	Field Match
Registry ID	Registry ID ▾
First Name	First Name ▾
Last Name	Last Name ▾
Full Name (if combined)	- No Selection - ▾
Email	Email ▾
Phone	Phone ▾
Zip Code	Zip ▾

Import Data	Close

1. Match the imported field column that is listed on your CSV file to the field match in the system.
2. You must choose a minimum of 3 fields to continue with the upload. We highly recommend Registry ID, First Name, and Last Name.
3. After the fields are chosen, click **IMPORT DATA**.

Import Attendees: Self-paced Events

Click the button below to upload your attendee roster file and import it for this event.

🔍 Select File ⬅️

| Please remain on this page until the import process is completed and your roster has been updated.

Need Help Importing Your File?   📄 Sample Import File ⬅️

In order for your import to be successful please review the following tips for a successful import.

1. Only CSV file types can be imported.
2. The first row of the CSV file must be column headers
3. Only include individuals who were in attendance
4. In order to successfully import attendees with potential user accounts, an exact match of one of the following combinations is required:
    ○ Registry ID, First Name, Last Name
    ○ Registry ID, First Name, Email Address
    ○ Registry ID, Last Name, Email Address
    ○ First Name, Last Name, Phone
    ○ First Name, Last Name, Zip
    ○ Email Address, First Name, Last Name
    ○ Email Address, Last Name, Phone
    ○ Email Address, Last Name, Zip
5. Training Completion Date required for each attendee

We have provided a sample import file to help identify desired format and structure.

3. On the import attendees screen, you will find a Sample Import File- you can download that file to fill in for the upload or you can create your own file. **The file must be saved as a CSV file for the upload.** (Please note that you should only add individuals who attended the training on the file for the upload- the system will automatically mark them as attended when they are uploaded.)
4. To begin the import, click the **SELECT FILE** button.
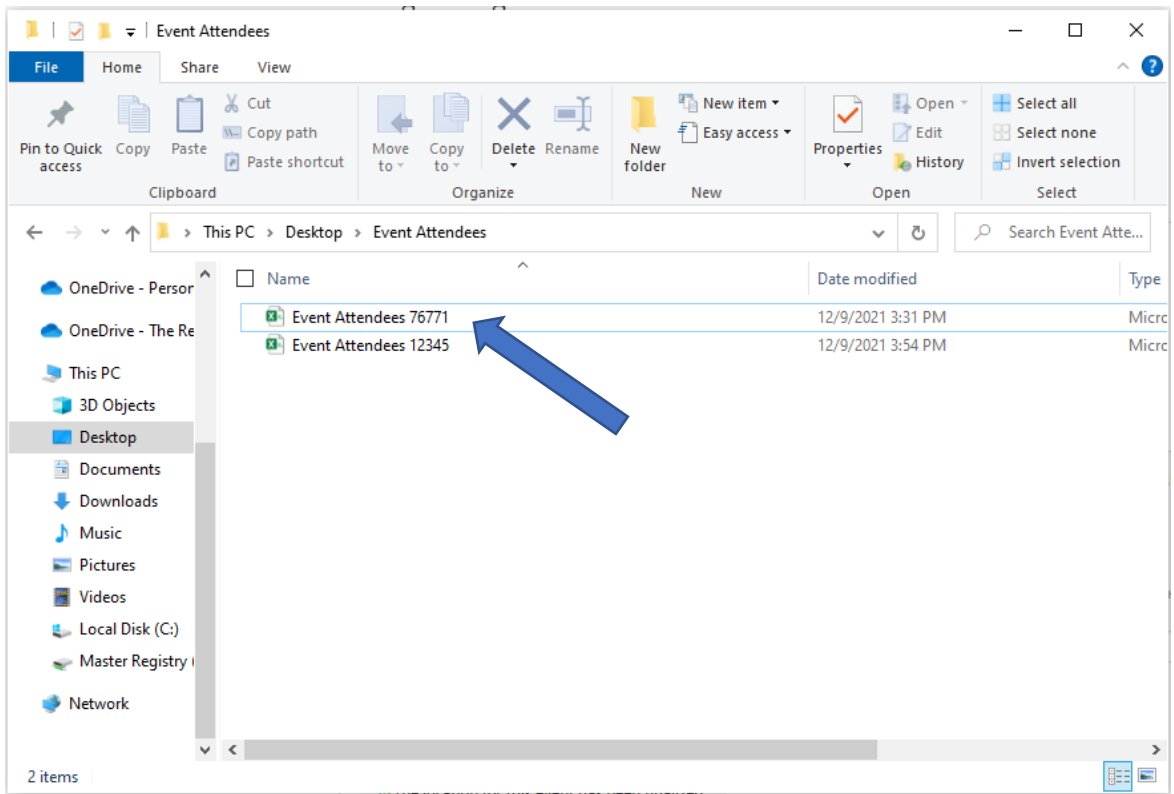
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2. From your saved files on your computer, choose the correct CSV file.

Please review your columns and select the appropriate field name to associate the data to in order to finish the import.

Imported Field Column	Field Match
Registry ID	- No Selection - ⌄

Imported Field Column	Field Match
First Name	- No Selection - ⌄

Imported Field Column	Field Match
Last Name	- No Selection - ⌄

Imported Field Column	Field Match
Email	- No Selection - ⌄

Imported Field Column	Field Match
Phone	- No Selection - ⌄

Imported Field Column	Field Match
Zip Code	- No Selection - ⌄

Imported Field Column	Field Match
Completion Date	- No Selection - ⌄

Import Data	Close

4. Match the imported field column that is listed on your CSV file to the field match in the system.
5. You must choose a minimum of 3 fields to continue with the upload. We highly recommend Registry ID, First Name, and Last Name. As this is a self-paced event, you must choose Completion date as well.
6. After the fields are chosen, click **IMPORT DATA**.

Import Results

Below are some general metrics regarding the success of this import.

The roster for this event has been updated with the total matched accounts.

Import Results   ⬇ Import Results

Total Rows 5 / Total Matched 3 / Total Unmatched 2

We used the following selected columns to match import records to existing user records.

✔ Registry ID
✔ First Name
✔ Last Name
✔ Email

👥 Manage Roster

Download the provided "Import Results" to view what attendees were successfully imported.

1. The import results section will show you the number of individuals that were matched and the number of individuals that were not matched.
2. You can select the **IMPORT RESULTS** button to download the file that will show you which individuals were matched, and which individuals were not.

1. On the downloaded file, you will see the Matched Registry ID's listed on the last column. The unmatched individuals will not have a Registry ID listed.
2. You can double check and update the information and reupload the CSV file to match the previously unmatched attendees. (Please note that only the attendees that were not previously matched will be added to the roster, the system will not create a double attendance record.)

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Import Results

Total Rows 5 / Total Matched 3 / Total Unmatched 2

We used the following selected columns to match import records to existing user records.

✔ Registry ID
✔ First Name
✔ Last Name
✔ Email

Manage Roster

Download the provided "Import Results" to view what attendees were successfully imported.

1. To access the roster, click the **MANAGE ROSTER** button. This will allow you to double-check the attendance.

Active Roster   Removed Attendees (0)   **+Attendee**

Registry ID	Name Address	Phone	Type	Registered	Paid	Attended	
11288	Ablintest, Sarah 19269 BILTONEN RD Homer, MI 49946-8406	(248) 767-4251		☐		☑	🗑
67088	Abrahamtest, Megan 718 W IONIA ST Kingsford, MI 48915-1898	(865) 414-6915		☐		☑	🗑
55650	Aldrichtest, Johnnie 8140 WINANS LAKE RD Detroit, MI 48116-8222	(517) 392-2956		☐		☑	🗑

Email Attendees   **Update Attendance**

1. The attendees will be added to the roster and marked as attended. If the event is self-paced, the date of completion will be listed under the attended column.