Completing the Spreadsheet Templates

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The first step in the data import process is to complete the Excel spreadsheet templates with the location, organization, contact, and resource data you want to import. Download the templates and fill each of them out following the guidelines below.

Image: Templates are available to download from the Series25 Data Import Tool.
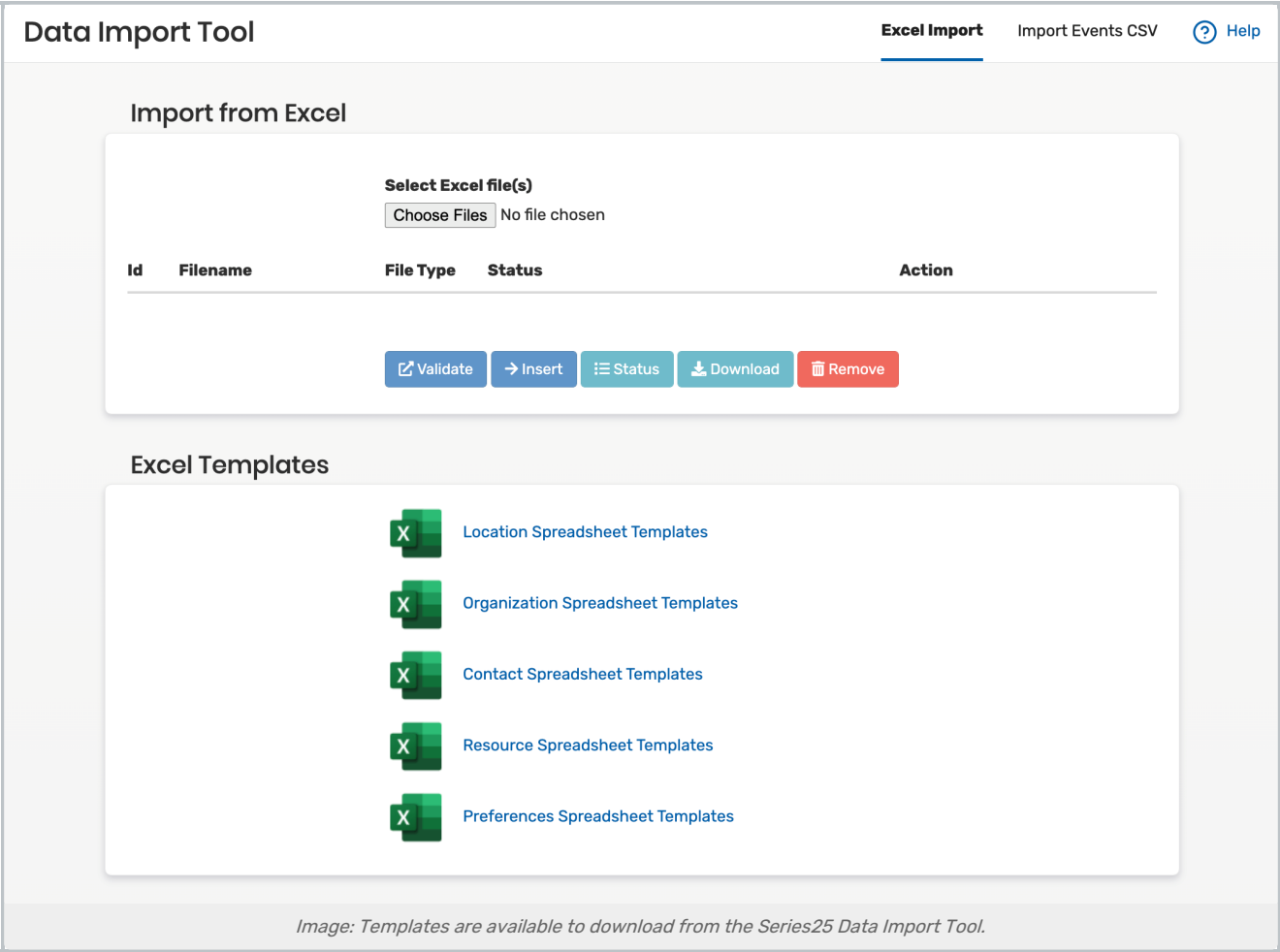
For specific instructions on importing partition preferences for use with Schedule25 Optimizer, see Importing Organization Partition Preferences.

> ⚠️ **Don't Delete Columns or Change Column or Worksheet Labels!**
>
> When filling out the spreadsheets, don't delete any of the columns, If you choose not to provide data in a particular column, that's fine, but don't delete the column itself.
>
> In addition, don't relabel any of the spreadsheet worksheets or columns.
>
> You can add columns after the standard columns in each worksheet for custom attributes you want to import. See "Custom Attribute Guidelines" below.

General Guidelines

These general guidelines are basic to a successful import:

- Don't alter the filename of the spreadsheet template. Keep it intact (e.g., locations.xslx).

- To import locations, the required data is location name and maximum capacity.

- To import contacts, the required data is contact internal ID/email and last name.

- To import resources and organizations, the required data is resource name or organization name, respectively.

- Any updates to the Series25 database are based on matches to the object identifiers listed above.

- To import locations, resources, organizations, and/or contacts, the characteristics you're attaching to those objects—for example, categories, features, layouts, partitions, and so on for location objects—must already exist in the Series25 database or be provided on the corresponding master definition data import worksheet. If they already exist in the Series25 database, you don't need to provide entries for them in the corresponding master definition data import worksheet.

- Be sure you spell each characteristic you're attaching to an object exactly as it appears in the corresponding master definition data import worksheet or in the Series25 database, although any combination of upper/lowercase is acceptable.

- List each of the characteristics of a particular object in its own row, as shown here for the location features of the Barataria location:

	A	B	C	D	E	F	G	H
1	Location II	Location Name	Formal Name	Partition Name	Capacity	Fill Ratio	Category	Feature
2		Barataria	Barataria-Room 319		12		Type - Conference Room	AV - Dedicated Audio/Visual
3		Barataria						AV - Internet Accessible
4		Barataria						Board - Glass
5		Barataria						Floor - Carpet
6		Barataria						Furniture - Conference Table

Image: Example spreadsheet.

> ℹ️ **Import Processing Notes**
>
> **Unmatched Characteristics**
> The import of a location, resource, organization, or contact continues even when the Data Import Tool is unable to match an assigned characteristic either to the corresponding worksheet (for example, for Location Partitions or Resource Categories) or to the corresponding master definition item in your Series25 database. The object is imported without the unmatched characteristic.
>
> **Location Relationships**

A complimentary/opposite location relationship, if left unspecified, is automatically added during the import process. For example, if you specify in the location spreadsheet that location X has a Divides Into relationship with locations A, B, and C, those locations (A, B, and C) will each automatically be designated as having a Subdivision Of relationship with location X.

Location Default Layouts

- If the import creates a new location and there is no default layout specified, the first layout listed becomes the location's default layout.

- If the import updates an existing location and there is no default layout specified, the location's existing default layout is not changed.

- If a default layout is specified for a location, that layout is set as the default. A layout named in the default layout column must also be added to the location elsewhere on the import template if it is not already associated with the location in 25Live, as shown here:

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Location ID	Location Name	Formal Name	Partition Name	Capacity	Fill Ratio	Category	Feature	Feature Quantity	Layout	Layout Capacity	Default Layout	Fill Ratio
		ARTS 101	Arts Building - Room 101							As Is	5		
		CUL 100A	Culinary Building - Room 100A - Cafeteria		150					Social Distancing	75	Social Distancing	
		CUL 102	Culinary Building - Room 102 - Kitchen		50					As Is	50		
		CUL 105	Culinary Building - Room 105 - Multi-purpose		100					Social Distancing	50	Social Distancing	
		CUL 105	Culinary Building - Room 105 - Multi-purpose		100					Classroom Rows	60		
		CUL 105	Culinary Building - Room 105 - Multi-purpose		100					Social Distancing	45		

Location Capacities

If you import a lower or higher maximum capacity for an existing location, the layout capacities for that location will also be proportionally adjusted downward or upward.

Location Scheduler

To set a scheduler for a location, specify a 25Live username in the appropriate field.

Custom Attribute Guidelines

The Data Import Tool lets you import custom attribute master definitions for locations, resources, contacts, and organizations, and enter a value for each custom attribute appropriate to its relevant object. You can list the custom attributes in the appropriate worksheet, or they may already be present in your Series25 database in which case you don't have to fill out the custom attribute worksheet.

25Live uses the following attributes:

Type of data	Attribute Type	Spreadsheet Format
Short text	S	Maximum 80 characters
Unlimited text	X	No maximum
Integer	N	Whole number without a decimal point
Floating point	F	Number with a decimal point
Date	D	MM/DD/YYYY
Date and time	E	MM/DD/YYYY hh:mm
Time only	T	hh:mm

Type of data	Attribute Type	Spreadsheet Format
URL	R	Include http:// or https:// at the beginning
Boolean	B	True/False, T/F, Y/N
Contact	3	Work email address
Location	4	Location name
Resource	6	Resource name
Organization	2	Organization name
Image	I	N/A – Do not upload images using this spreadsheet

Completing a Custom Attributes Worksheet

These instructions only apply if you're importing new custom attributes that are not yet in your Series25 database.

On the Custom Attributes worksheet for locations, resources, organizations, or contacts, provide a name for each custom attribute you want to import to the corresponding 25Live custom attribute master definition.

For each custom attribute, enter the appropriate **Attribute Type** as indicated in the table above:

Here's an example of custom attribute master definitions listed in the Location Custom Attributes worksheet:

	A	B	C	D
1	Attribute Name	Attribute Type		
2	Security Access Controls	B		
3	Department Contact	S		
4	Room Use Contract	R		
5	Last Renovated	D		

Image: Example of custom attributes in spreadsheet.

Entering Custom Attribute Values For Objects

Create a column on the corresponding Location, Resource, Organization, or Contact worksheet for each custom attribute you want to enter a value for. Each column header must match a custom attribute from the custom attribute worksheet or from your Series25 database.

For each location, resource, organization, or contact to which an attribute applies, make the appropriate entry based on the Spreadsheet Format in the table above.

Here's an example of three custom attribute entries for a location in the Location worksheet:

Security Access Controls	Room Use Contact	Last Rennovated
T	Department Secretary	10/15/2018

Image: Location custom attributes example.

The import looks for a custom attribute to match any column in an object worksheet (such as "Location") with a column header label not predefined in the corresponding Excel template. The import continues even when the Data Import Tool is unable to match a column heading to either the corresponding Custom Attributes worksheet or a Custom Attributes master definition in 25Live. The affected objects are imported without the unmatched data element.