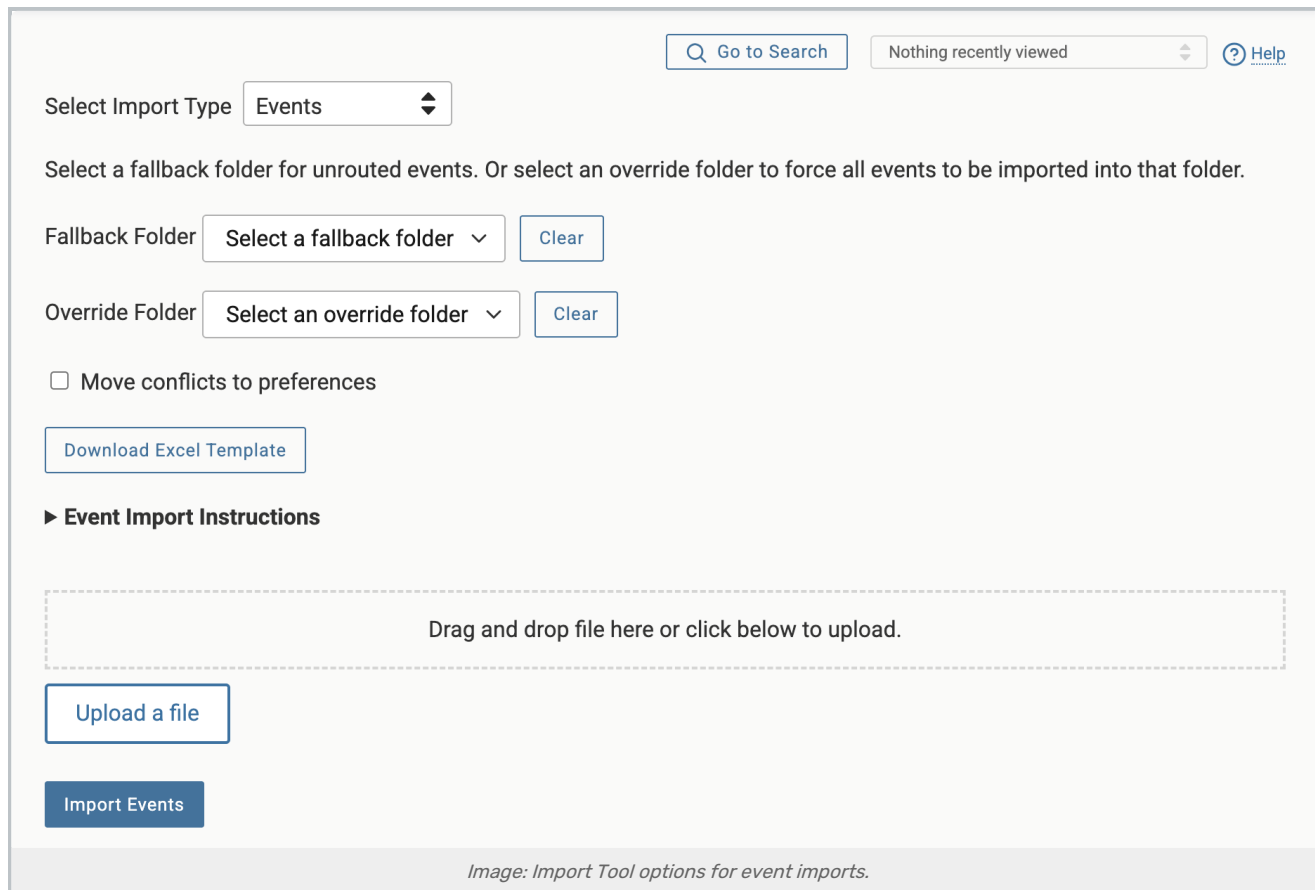


Using the New Import Tool

The Import Tool allows administrators to bulk-import events, contacts, and organizations into your environment using Excel spreadsheets.

To access the tool, select **Import Tool (New)** from the **Go to Tool** section of the 25Live More menu. **More > Go to Tool.**



The screenshot shows the 'Import Tool' interface for event imports. At the top right, there is a search bar with a magnifying glass icon and the text 'Go to Search', a status bar indicating 'Nothing recently viewed', and a help icon with the text 'Help'. Below this, the 'Select Import Type' dropdown menu is set to 'Events'. A text instruction reads: 'Select a fallback folder for unrouted events. Or select an override folder to force all events to be imported into that folder.' There are two dropdown menus: 'Fallback Folder' with the text 'Select a fallback folder' and a 'Clear' button, and 'Override Folder' with the text 'Select an override folder' and a 'Clear' button. A checkbox labeled 'Move conflicts to preferences' is present. Below this is a 'Download Excel Template' button. A section titled 'Event Import Instructions' with a right-pointing triangle icon follows. A large dashed box contains the text 'Drag and drop file here or click below to upload.' Below this box is an 'Upload a file' button. At the bottom left is an 'Import Events' button. At the bottom right, a caption reads 'Image: Import Tool options for event imports.'

Importing Events

1. Select Events From the Dropdown

- Select **Events** from the Select Import Type dropdown.

2. Configure Routing

- **Fallback Folder** — Select a folder to route imported events to when they do not match any existing folder routing rules.
- **Override Folder** — Select a folder to force all imported events into, regardless of routing rules.
- **Move conflicts to preferences** — Check this box to save conflicting location assignments as event preferences. If left unchecked, conflicting assignments are removed.

3. Download and Complete the Events Template

- **Download Excel Template** to get the pre-built spreadsheet. Fill in your event data and save the file.

4. Upload Your Completed File and Start the Import

- Drag and drop your completed file into the upload area or use the **Upload a file** button.
- Click **Import Events** to begin the import.
- If validation errors are found, they display below the import instructions. Correct the errors in your file and re-upload. Once validated, a success message displays and the imported events are available in your environment.

Required Columns

Column	Type	Description
EVENT_ID	string	Unique identifier for the event
EVENT_NAME	string	Name of the event
EVENT_TYPE	string number	Event type name or ID
SCHEDULER	string number	Contact email or contact ID
REQUESTOR	string number	Contact email or contact ID
PROFILE_ID	string	Unique identifier for the event profile
FIRST_OCCURRENCE_DATE	string	ISO date format (YYYY-MM-DD)
START_TIME	string	ISO datetime format (YYYY-MM-DDTHH:mm:ss)
END_TIME	string	ISO datetime format (YYYY-MM-DDTHH:mm:ss)

Optional Columns

Column	Type	Description
EVENT_TITLE	string	
DESCRIPTION	string	
INTERNAL_NOTES	string	
PRIMARY_ORGANIZATION	string number	Organization name or ID
REG_HEADCOUNT	number	
EXP_HEADCOUNT	number	
CATEGORIES	string	Pipe-separated category names or IDs (e.g., "Category1 Category2")
INSTRUCTOR	string number	Contact email or contact ID

Column	Type	Description
PROFILE_NAME	string	
PRE_EVENT_TIME	string number	Time string (HH:mm:ss) or minutes
POST_EVENT_TIME	string number	Time string (HH:mm:ss) or minutes
REPEATING_RULE	string	Recurrence pattern code (or use ADHOC_DATES instead)
ADHOC_DATES	string	Pipe-separated ISO dates – alternative to REPEATING_RULE (e.g., "2024-01-15 2024-01-22")
LOCATIONS	string	Pipe-separated location names or IDs. Append :shared for shared locations (optional; omitted locations default to unshared)
RESOURCES	string	Pipe-separated resource names or IDs; append :quantity (e.g., "Projector:2 Microphone:1")
BOUND_PROFILE_ID	string	Pipe-separated profile IDs
RELATED_EVENT_ID	string	Pipe-separated event IDs
CUSTOM_ATTRIBUTES	string	Pipe-separated, format: name:value (e.g., "Attribute1:Value1 Attribute2:Value2")

Additional Notes

- If an event has more than one occurrence, either REPEATING_RULE or ADHOC_DATES must be provided.
- Contact fields can use email addresses (system will resolve to contact IDs).
- Organization/Event Type fields can use names (system will resolve to IDs).
- Locations and Resources can use names (system will resolve to IDs). For objects with numeric names, prepend with \$NAME- .

Importing Organizations

1. Select Organizations From the Dropdown

- Select **Organizations** from the Select Import Type dropdown.

2. Determine if Data Should Be Identified for Connect25

- Optionally check **Mark all organizations and contacts as Student Engagement** if the Student Engagement designation should be added to all imported organizations and contacts.

3. Download and Complete the Events Template

- Click **Download Excel Template** to get the pre-built spreadsheet. Fill in your organization and membership data and save the file.

4. Upload Your Completed File and Start the Import

- Drag and drop your completed file into the upload area or use the **Upload a file** button.
- Click **Import Organizations** to begin the import.
- If validation errors are found, they display below the import instructions. Correct the errors in your file and re-upload. Once validated, a success message displays and the imported organizations are available in your environment.

Required Columns

Column	Type	Description
Organization Name	string, max 40 chars	Organization name (or use Organization ID for existing organizations)
role_name	string	Role in the organization. Required for memberships
contact_email	string, max 80 chars	Contact's email. Required for memberships
contact_first_name	string, max 40 chars	Contact's first name. Required for memberships
contact_family_name	string, max 40 chars	Contact's last name. Required for memberships

Optional Organization Columns

Column	Type	Description
Organization ID	number	Use to update an existing organization; when provided with a different Organization Name, the name will be updated
Title	string, max 80 chars	Organization title
Account Number	string	Account number
contact_name	string	Contact name
S25 Name	string	Schedule25 Optimizer name
Type	string number	Organization type name or ID (numeric names should use \$NAME- prefix)
Rating	string number	Organization rating name or ID (numeric names should use \$NAME- prefix)
Category	string	Pipe-separated category names or IDs (e.g., "Category1 Category2")

Optional Address Columns

Address Columns (Optional)

Administrative Address

Column	Type	Description
Administrative Street Address	string, max 150 chars	Street address for the organization's administrative location
Administrative City	string, max 40 chars	City for the organization's administrative location
Administrative State / Province	string, max 40 chars	State or province for the organization's administrative location
Administrative Zip / Postal Code	string, max 20 chars	Zip or postal code for the organization's administrative location
Administrative Country	string, max 40 chars	Country for the organization's administrative location
Administrative Phone	string, max 24 chars	Phone number for the organization's administrative location
Administrative Fax	string, max 24 chars	Fax number for the organization's administrative location

Billing Address

Column	Type	Description
Billing Street Address	string, max 150 chars	Street address for the organization's billing location
Billing City	string, max 40 chars	City for the organization's billing location
Billing State / Province	string, max 40 chars	State or province for the organization's billing location
Billing Zip / Postal Code	string, max 20 chars	Zip or postal code for the organization's billing location
Billing Country	string, max 40 chars	Country for the organization's billing location
Billing Phone	string, max 24 chars	Phone number for the organization's billing location
Billing Fax	string, max 24 chars	Fax number for the organization's billing location

Additional Notes

- Column names are case-insensitive and support variations (e.g., "Organization ID", "organization id", or "OrganizationID" all work).
- Address fields are optional – you can include Administrative, Billing, both, or neither.
- Organization type and category fields can use names (system will resolve to IDs).

Importing Contacts

1. Select Events From the Dropdown

- Select **Contacts** from the Select Import Type dropdown.

2. Determine if Data Should Be Identified for Connect25

- Optionally check **Mark all contacts and users as Student Engagement**.

3. Download and Complete the Events Template

- Click **Download Excel Template** to get the pre-built spreadsheet. Fill in your contact data and save the file.
- Each row carries a contact's data and, optionally, a user (Username, Password, Security Group) plus any custom attribute columns. Contacts and users are matched (or created) by email; security groups must already exist and are matched by name.
- Use a single sheet (no separate tabs). Each row is one person. Include only the columns you need.

4. Upload Your Completed File and Start the Import

- Drag and drop your completed file into the upload area or use the **Upload a file** button.
- Click **Import Contacts** to begin the import.
- If validation errors are found, they display below the import instructions. Correct the errors in your file and re-upload. Once validated, a success message displays and the imported contacts are available in your environment.

Contact Identity Columns

Column	Type	Description
Email	string	Contact's email address; used to find or create the contact
First Name	string	Contact's first name; used to find or create the contact
Last Name	string	Contact's last name; used to find or create the contact
Contact ID	number	ID of an existing contact to update directly; names not required when provided

Optional Contact Columns

Column	Type	Description
Middle Name	string	Contact's middle name
Name Prefix	string	Prefix for the contact's name (e.g., Dr., Mr., Ms.)
Name Suffix	string	Suffix for the contact's name (e.g., Jr., III)
Title	string	Contact's job title or role
Address	string	Contact's street address
City	string	Contact's city
State	string	Contact's state or province

Column	Type	Description
Zip	string	Contact's zip or postal code
Country	string	Contact's country
Phone	string	Contact's phone number
Fax	string	Contact's fax number
Internal ID	string	SIS identifier for the contact; must be unique within the upload

Optional User Columns

Column	Type	Description
Username	string	Username for the contact's user account; required when creating or updating a user
Password	string	Password for the user account; encrypted on save. Leave blank to keep an existing password (new users get a random one)
Security Group	string	Security group to assign to the user; must already exist and is matched by name. Requires Username

Custom Attribute Columns

- Prefix the header with CA: to import a contact custom attribute (one attribute per column).
- Type codes: S text, R long text/URL, N number, F float, B boolean, E datetime, D date, T time

Column	Type	Description
CA: <TYPE> Name	string	Auto-creates a custom attribute with the given type if it does not exist yet (e.g., CA: Veteran , CA: <S> Major , CA: <N> Credits).
CA: Name	string	Uses an existing custom attribute matched by name; no type needed