Import User Guide

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Table Of Contents

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Purpose

This document provides instruction on how to use the LeagueOne Import facility.

Preparation And Tips

Here are some suggestions that will make it easier to import your data. Some of these suggestions will make more sense after you completely review this document.

1) Import your records in smaller groups. If possible, divide your records into separate import files by Division and/or Age Group. This will make it easier to prepare your data for import.

2) The import upload will only store 60 columns. If your input file has more than 60 columns, please delete un-needed columns before uploading your file.

Introduction

The Import Facility is a powerful tool for loading registrations into LeagueOne from an external system. It maintains the same high standards of data integrity that you already enjoy when manually entering registrations within LeagueOne. This tool is designed to help you resolve any data conflicts that you encounter as you would if you were registering through the standard LeagueOne screens.

Several steps are required to use the import facility:

1. **Upload** a file.
2. **Map** the fields in your file to the fields in LeagueOne.
3. **Prepare** your data for import. This involves setting age groups, divisions, player id's to values that LeagueOne understands.
4. **Import** your data. The system stops on any record that can not be imported and allows you to correct the record.
5. **Clean up**.

This tool requires considerable expertise and is not designed for beginners. Please read this guide in it's entirety before you begin.

Figure 1 - Player Import Summary

The Player Import screen summarizes the records that have been uploaded to LeagueOne based on their status and provides a series of buttons that allow you to navigate to each import step. After you press one of these buttons, you can always navigate back to this page by pressing the Return button on that page.

Upload File

The Upload File capability allows you to send a file to LeagueOne with the players that you would like to import. This is the first step in the import process.

LeagueOne can process Comma Separated Value files (CSV). CSV files are simply files that are formatted so that each field is separated by a comma. CSV is a very common format that is used when computer systems share data. If your data is in an Excel spreadsheet, you can save the spreadsheet as a CSV file by choosing "Save As" from the file menu and the choosing CSV as the output type.

From the Player Import Summary page (see Figure 1 - Player Import Summary on page 4), click on the "1 – Upload File" button. The following screen will appear:

Figure 2 - Upload File

Press the browse button to locate the file that you would like to upload. Once you have located the file, press the Upload button at the bottom left corner of the screen to start the upload process. When the upload completes, a message will appear telling you how many records were uploaded.

To return to the Player Import Summary page, press the Return button.

Map Fields

The Map Fields screen allows you to define a mapping between the fields in the file that you uploaded and LeagueOne fields. Each map can be saved so that you can use it for your next upload.

From the Player Import Summary page (see Figure 1 - Player Import Summary on page 4), click on the "2 – Map Fields" button. The following screen will appear:
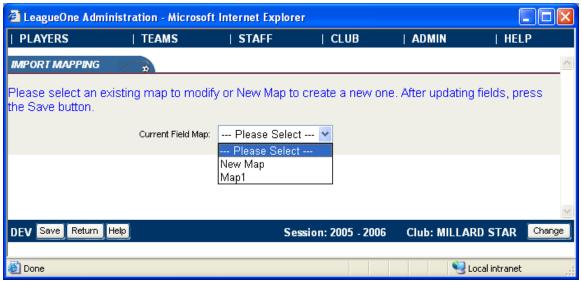

Figure 3 - Map Fields

The drop down list will show existing maps from prior sessions and an entry called "New Map" that you can use to create a new map.

When selecting a new map you will have the option to choose between a Youth Import mapping and an Adult Import mapping.
1. If you select 'Youth Import' mapping primary guardian information **will be required**. This mapping type will only accept players under the age of 19.
2. If you select 'Adult Import' mapping primary guardian information will **NOT** be required. This mapping type will only accept players over the 18.
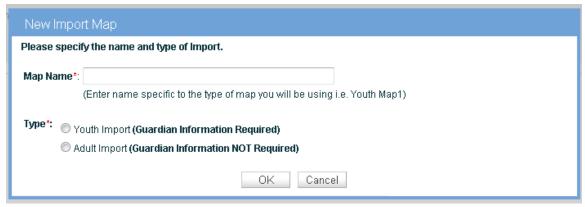
Figure 4

Choose the appropriate option. After you make your selection, a screen will appear that shows the first five rows of your uploaded data.

Figure 5

You can scroll to the right to see all of your columns. You will always see Field1 through Field 60 even if your data has less than 60 columns.

If your first 5 records were blank then it will be difficult for you to map your fields. Skip ahead to the next topic (Prepare) so that you can learn how to delete unwanted rows. Delete the blank rows and then return to map your data.

Next, use the dropdown boxes for each field to identify the LeagueOne field that corresponds to your data. In the following example, three fields have been mapped: Player Last Nm, Player First Nm, and PlayerId Last 4 Digits.
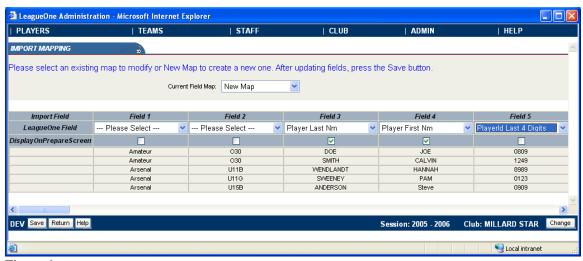
Figure 6

Fields will be based on the import mapping you have selected. For example you will not see Primary or Secondary guardian fields for Adults. These fields are only required for Youths.

You will also note the checkboxes in the "Display On Prepare Screen" row. Any column that you check will be displayed in a grid on the Prepare screen.

Importing Player to a Team

If you are using the import tool to import players onto existing teams, you will need to map your players to the following three fields in League One.
Team ID
Team (Short) Name
Team (Long) Name

If you are missing this information in the spreadsheet, you will not be able to import a player onto a team. A team must be created in LeagueOne first in order to import to a team.

To return to the Player Import Summary page, press the Return button.

Prepare

The Prepare screen allows you to prepare each record for import. Preparing is the process of reviewing your data and ensuring that the required fields are completed. There are several fields (Season, Division, Age Group, Registration Type, Player Id) that need to be set for each record before importing the record.

What You Need To Do Prepare For Import

After you upload records and create a map, navigate to the Prepare screen and press the Find button. Your records will be displayed as in Figure 7.
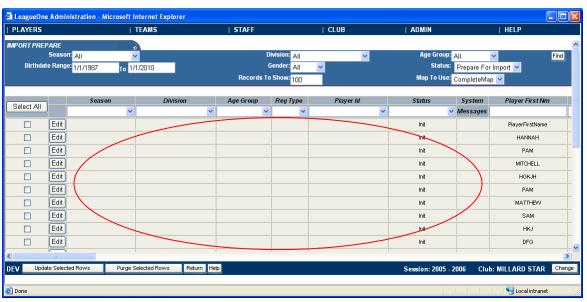
Figure 7

You will notice in Figure 7 that Season, Division, Age Group, Registration Type, and Player Id fields are blank. The purpose of the Prepare screen is to complete these fields with values that are appropriate for your club. Instructions for each are listed in this section.

Once these fields have been updated, change the status for the records to "Ready For Import". Instructions for changing the Status field are listed below. Records that are in the "Ready For Import" status are picked up in the Import step (see the next section).

Note: Even if your import file had fields for Season, Division, Age Group, Registration Type, or Player Id, you must still set the correct values in the corresponding columns that appear on the left side of the field list (see Figure 9).

Prepare Screen Introduction

The Prepare screen allows you to set these values for one or many records at the same time. From the Player Import Summary page (see Figure 1 - Player Import Summary on page 4), click on the "3 – Prepare" button. The following screen will appear:
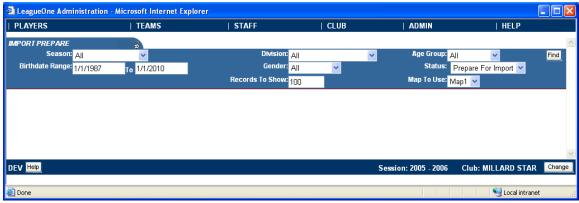
Figure 8

The Prepare screen has a series of filters that can be used to specify which records are retrieved. They are:

Field	Description
Session	Lists the seasons that are available in the current year.
Division	Lists the divisions that are available in the current club.
Age Group	Lists the age groups that are available in the current club.
Birthdate Range	Allows you to specify a range of birth dates to retrieve. Note: this filter will only work if your map includes the Birthdate field.
Gender	Allows you to narrow the list of genders to process. Note: this filter will only work if your map includes the Gender field.
Status	Defaults to "Prepare For Import" although you can also bring up records that are "Ready For Import" and "Imported".
Records To Show	This limits the number of records that are displayed.
Map To Use	Allows you to select from all of the maps that you have defined in previous steps.

After selecting your filter values, press the "Find" button to retrieve records.

Figure 9

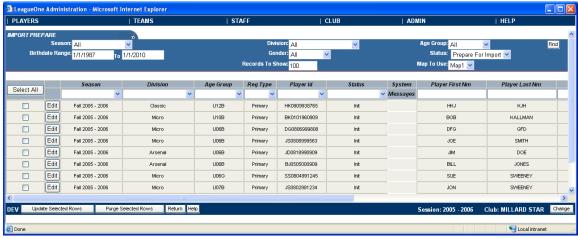The first 9 columns are always the same while the columns that follow are the ones that you chose to display when defining your map (see Figure 6 on page 4). Using the scrollbar will allow you to see all of the columns that you have selected to display.

Updating Values From The Prepare Screen

The Prepare screen lets you make many changes at once. You do not need to Edit each record. Mass updates are performed using the following steps:
1) Select the records that you would like to update (press Select All to choose all records).
2) Set the value in the box under the column header. You can set more than one column at a time if you choose.
3) Press the Update Selected Rows button.

The values will be updated and the screen will be refreshed.

Purging Records

You can Purge records by selecting the appropriate record and then pressing the "Purge Selected Rows" button. This is a good way to delete unwanted records.

Updating One Record Using The Edit Button

You may press the Edit button to bring up all of the fields for one record.

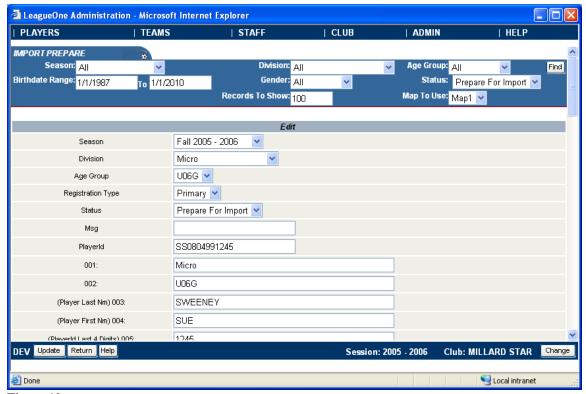**Figure 10**

The Edit window shows all uploaded fields including fields that have not been mapped. The uploaded fields begin with field 001 and conclude with field 060. Mapped field names are displayed in parenthesis.

You can change the values in any column, for one or more rows, by selecting the checkbox for the row and then pressing the Update button.

Setting The Season

Figure 11

The Season column will be blank after you upload your data. To set the value, choose the appropriate value from the dropdown list and then select all rows that you would like to update. Press the "Update Selected Rows" button.

Setting The Division

Figure 12

The Division column will be blank after you upload your data. To set the value, choose the appropriate value from the dropdown list and then select all rows that you would like to update. Press the "Update Selected Rows" button.

How do you know which division to use for each record? Here are a couple of ways to know which division to set a record to:
1) Upload and process one division at a time (i.e. separate your upload files by division).
2) Include a field in your upload file that indicates the division. Make sure that the field is displayed in your map (see Figure 6 on page 4). Note: to make the field display, map it to one of the Config fields and check the "Display On Prepare Screen" so that it is displayed properly.

Setting The Age Group

The Age Group column will be blank after you upload your data. To set the value, choose the appropriate value from the dropdown list and then select all rows that you would like to update. Press the "Update Selected Rows" button.
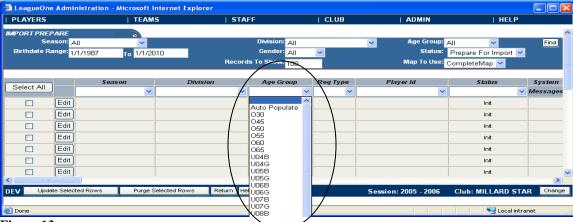
Figure 13

Age Group has an "Auto Populate" option in the dropdown list. Auto Populate uses the birthdate and gender to determine the age group. This option will only appear if Birthdate and Gender are included in your map.

Setting The Reg Type

Figure 14

The RegType column (i.e. Primary, Secondary, etc.) will be blank after you upload your data. To set the value, choose the appropriate value from the dropdown list and then select all rows that you would like to update. Press the "Update Selected Rows" button.

Setting The Player Id

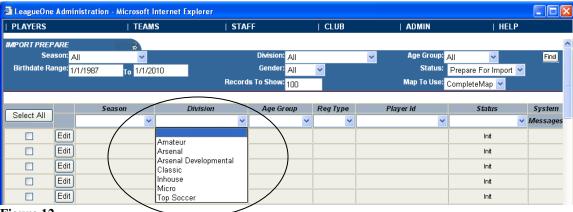The Player Id column will be blank after you upload your data. To set the value, choose the appropriate value from the dropdown list and then select all rows that you would like to update. Press the "Update Selected Rows" button.
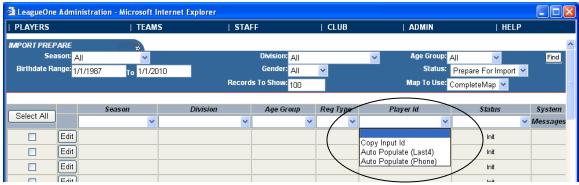
Figure 15

Player Id has several "Auto Populate" options in the dropdown list:
- Copy Input Id
- Auto Populate (Last4)
- Auto Populate (Phone)

Copy Input Id

This option copies the value from the column that is mapped to "PlayerId (LeagueOne Format)". This is useful when the LeagueOne player id has been stored in the external system. This option is only visible when the "PlayerId (LeagueOne Format)" field has been defined in the map.

Auto Populate (Last4)

This option determines the player id from the Player First Name, Player Last Name, Player Birthdate, and PlayerId Last 4 Digits fields. This option is only visible when all of the previously mentioned fields have been defined in the map.

Auto Populate (Phone)

This option determines the player id from the Player First Name, Player Last Name, Player Birthdate, and the Primary Guardian Home Phone fields. This option is only visible when all of the previously mentioned fields have been defined in the map. This option is useful when the last four digits are not known and the user decides to use a temporary value. The system calculates this value by using a "9" followed by the last three digits of the phone number. **This method should only be used as a last resort.**

Setting The Status

There are three statuses:

Prepare For Import (Init)		Initial status when records are uploaded.
Ready For Import (Ready)		Once you have prepared the records, change the records to this status. The Import Players step will only process records with this status.
Imported (Imported)		Once a record has been successfully imported, it will have this status.

The Status column will initially be set to "Prepare for Import". You can change it to "Ready For Import" and the records will be included in the next Import run. To set the value, choose the appropriate value from the dropdown list and then check the Select box for all rows that you would like to update. Press the "Update Selected Rows" button.

Import Players

The Import screen actually imports each record. If any errors are encountered during the import, the process stops and allows you to correct the error.

From the Player Import Summary page (see Figure 1 - Player Import Summary on page 4), click on the "4 – Import" button. The following screen will appear:
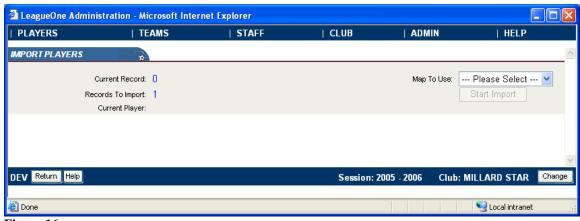

Figure 16

The left side of the Import Players screen lists the Current Record, the number of records to import and the current player record that is being processed.

To begin the import, choose the "Map To Use" and then press the Start Import button. The import will begin to process each record until all records are processed.

What To Do When Records Do Not Import Correctly?

The following pages will describe several scenarios where the Import will be stopped and you will be given the opportunity to correct the error. Each of those screens will also give you the opportunity to skip the current record. After skipping a record you can come back to it using the Prepare screen and edit fields as necessary.

Figure 17

Figure 17 shows what the bottom of each error screen will look like. If you press either "Skip" or "Skip And Remove" and type a comment in the box, the comment will be placed in the System Messages column. This is a handy way to remember what the problem was.

What To Do When The Imported Player Is Not A Perfect Match?

LeagueOne will attempt to locate the player based on name, birthdate, player id and phone number. If it is not a perfect match, you will be prompted to ensure that the correct player is identified. LeagueOne will give you a choice between:

- Close matches (see James Norvell below). Note: Close matches are players that share the same initials and birthdate.
- Sibling of an existing player (see Paxton Norvell below). Note: Sibling options are offered when there is a match on phone number.
- New Player
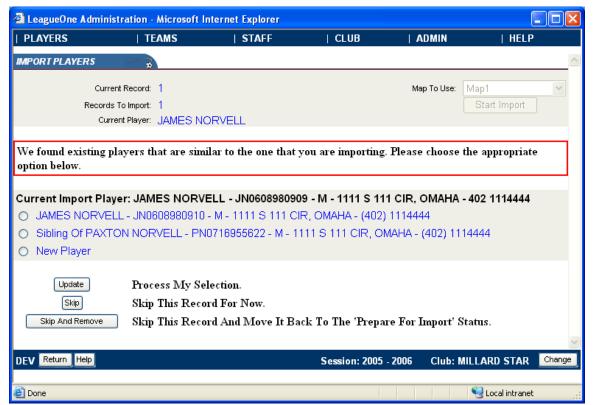
Figure 18

To proceed with the import of this record, choose the appropriate record and press the Update button. You can also Skip the record.

What To Do When The Registration Check Reveals Errors?

LeagueOne will check to make sure that the player can be registered for the selected season, division, age group, and registration type. Due to the policies of each state association, you may find that the player is already registered in your club (or another

club) in a way that precludes this registration. In that case, the screen in Figure 19 will be displayed.

The "Registrations In The Current Year" section shows you existing registrations for this player so that you will know what is available.

To proceed with the import of this record, choose the appropriate options and press the Update button. You can also Skip the record.
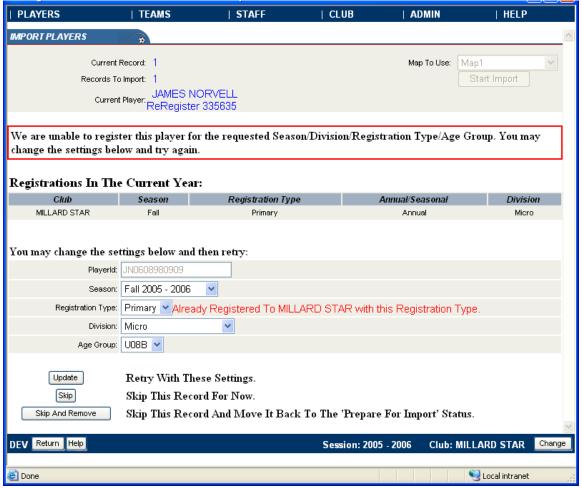

Figure 19

What To Do When The Imported Guardians Do Not Match The Guardians That Are In The Database (Youth Only)?

For Youth players LeagueOne will attempt to match up the imported guardians to the guardians in the database. If it is not a perfect match, you will be prompted to ensure that the correct information is used.

Figure 20 shows the screen that allows you to select the appropriate contact information to update when the guardian match is not complete.
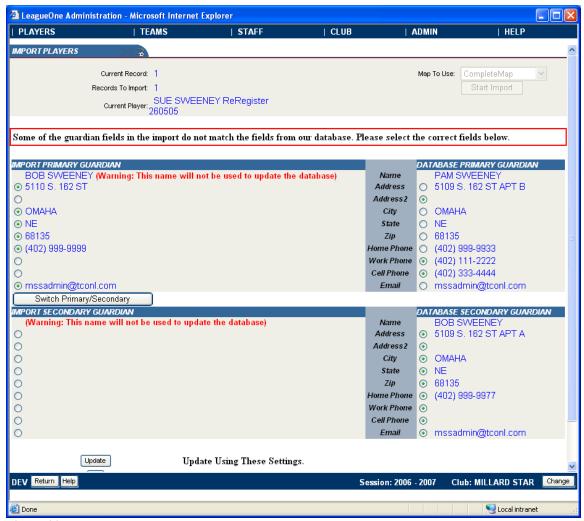
Figure 20

If you find that the Imported Guardian information (on the left) does not match the corresponding guardian in the database (on the right), press the "Switch Primary/Secondary" button to make the Import Primary the Secondary and vice versa.

You will notice that each piece of contact information (i.e. Zip, home phone, etc.) allows you to choose between the Import value and the database value. If the Import fields are blank, the database value will be used.

Note: The Guardian name in the database is never replaced by the Guardian name from the import file. In many cases the record in the database has other history attached to it (background checks, coaching certifications, coaching jobs, etc.).

To proceed with the import of this record, choose the appropriate options and press the Update button. You can also Skip the record.

What To Do When The Imported Guardians Do Not Match The Guardians That Are In The Database (Youth Only)?

After the guardians are matched, their data is validated. If any errors are found, the screen in Figure 21 is displayed. To proceed with the import of this record, choose the appropriate options and press the Update button. You can also Skip the record.

Figure 21

Cleanup

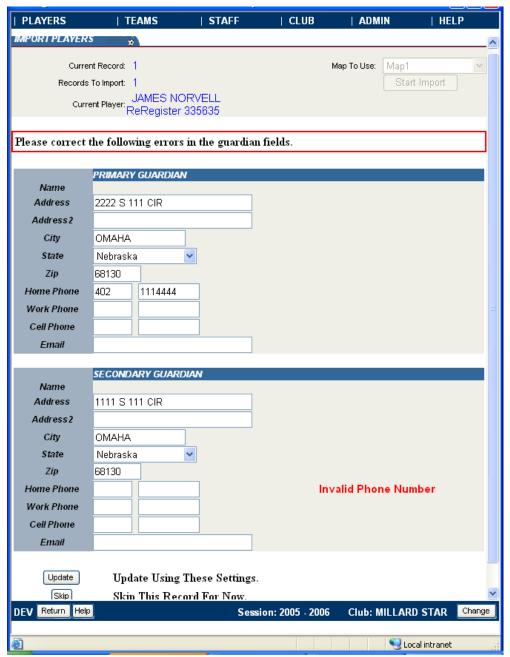The final step is to cleanup your imported data.   From the Player Import Summary page (see Figure 1 - Player Import Summary on page 4), click on the "5 – Cleanup" button.

The Cleanup screen is actually the Prepare screen however the Status has been set to Imported. To clean up, press the Find button to retrieve all of your Imported records. Select them all and press the "Purge Selected Rows" button.

Appendix A – Import Fields

The Import Facility allows you to map to a limited number of LeagueOne fields. They are:

Field	Required?	Applies to?	Notes
Player First Nm	Y	Youth and Adult	
Player Last Nm	Y	Youth and Adult	
Player Birth Dt	Y	Youth and Adult	
Player Gender	Y	Youth and Adult	M or F
PlayerId Last 4 Digits		Youth and Adult	Some customers use the Mothers Month And Day Of Birth and others use the Last 4 Digits of the SSN for their Player Id.
PlayerId (LeagueOne Format)		Youth and Adult	If you store the LeagueOne Player Id, you can use this field to identify the field that contains this value.
Street	Y	Adult	
Street2		Adult	
City	Y	Adult	
State	Y	Adult	
Zip	Y	Adult	
Home Ph	Y	Adult	
Work Ph		Adult	
Cell Ph		Adult	
Email		Adult	
Prim Guardian FName	Y	Youth	
Prim Guardian LName	Y	Youth	
Prim Guardian Street	Y	Youth	
Prim Guardian Street2		Youth	
Prim Guardian City	Y	Youth	
Prim Guardian State	Y	Youth	
Prim Guardian Zip	Y	Youth	
Prim Guardian Home Ph	Y	Youth	
Prim Guardian Work Ph		Youth	
Prim Guardian Cell Ph		Youth	
Prim Guardian Email		Youth	
Sec Guardian FName		Youth	
Sec Guardian LName		Youth	
Sec Guardian Street		Youth	
Sec Guardian Street2		Youth	
Sec Guardian City		Youth	
Sec Guardian State		Youth	
Sec Guardian Zip		Youth	
Sec Guardian Home Ph		Youth	

Field	Required?	Applies to?	Notes
Sec Guardian Work Ph		Youth	
Sec Guardian Cell Ph		Youth	
Sec Guardian Email		Youth	
Team ID		Youth and Adult	Required with Team Short and Long name
Team (Short) Name		Youth and Adult	Required with Team ID and Team Login Name
Team (Long) Name		Youth and Adult	Required with Team ID and Team Short Name
Config 1		Youth	Configurable fields can be used to store additional data like: school, grade, etc.
Config 2		Youth and Adult	
Config 3		Youth and Adult	
Config 4		Youth and Adult	
Config 5		Youth and Adult	
Config 6		Youth and Adult	
Config 7		Youth and Adult	
Config 8		Youth and Adult	
Config 9		Youth and Adult	
Config 10		Youth and Adult	
Config 11		Youth and Adult	
Config 12		Youth and Adult	
Config 13		Youth and Adult	
Config 14		Youth and Adult	
Config 15		Youth and Adult	
Config 13		Youth and Adult	
Config 16		Youth and Adult	
Config 17		Youth and Adult	
Config 18		Youth and Adult	
Config 19		Youth and Adult	
Config 20		Youth and Adult	
Config 21		Youth and Adult	
Config 22		Youth and Adult	
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Config 24		Youth and Adult	
Config 25		Youth and Adult	
Config 26		Youth and Adult	
Config 27		Youth and Adult	
Config 28		Youth and Adult	
Config 29		Youth and Adult	
Config 30		Youth and Adult	
Config 31		Youth and Adult	
Config 32		Youth and Adult	
Config 33		Youth and Adult	
Config 34		Youth and Adult	
Config 35		Youth and Adult	
Config 36		Youth and Adult	

Field	Required?	Applies to?	Notes
Emergency Contact		Youth	
Emergency Phone		Youth	
Medical Conditions		Youth	
Doctor		Youth	
Doctor Phone		Youth	
Overage Reason		Youth	If older players are allowed to play in a younger age group, the reason is required and can be supplied through this field.