Athlete Import Table of Contents:

Pre-requisites Prior to Beginning the Import Process:

Prior to beginning the import process, you do need to ensure you have some of the basics of database customization. If your database has already been setup, you can skip ahead on to Starting the Demographic Import.

If you have a new database, you need to do some set up prior to running the import.
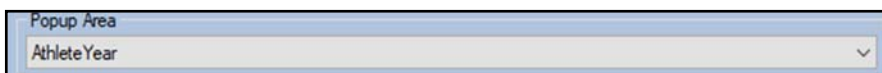
Pre-Requisite 1 Teams:

During setup, you have to create the teams for athletes to go on. This is typically done during initial setup, but if you need to add another team please see the help doc on setting up teams.

Depending on the person's team access, those are the teams they will be able to import for.

Pre-Requisite 2 Athlete Years:

If you do not want to utilize the standard Freshman, Sophomore, Junior, Senior classifications that are default in ATS you need to customize them.

Go to Admin—>Maintenance—> Dropdown/Popup lists—> Update Dropdown/Popup Lists. In the maintenance area, look for AthleteYear.   For more info review the customize dropdown/poupup lists help doc.

Popup Area
AthleteYear ⌄

Pre-Requisite 3 Athlete Genders:

The athlete genders that come with ATS are Male, Female, and Other. You are able to add as many other genders to the list as you need.

Go to Admin—>Maintenance—> Dropdown/Popup lists—> Update Dropdown/Popup Lists. In the maintenance area, look for the dropdown of AthleteGender. For more info review the customize dropdown/poupup lists help doc.

Popup Area
AthleteGender ⌄

ATS Import spreadsheet (xlsx) specifications:

- Your file **must** use an "XLSX" format, and have a header row indicator the items listed below.
- For the Import to run correctly, use the template that is provided in our .Zip file, Import_Athletes_Template, and not your own spreadsheet. If you need the file again please click HERE. DO NOT REMOVE COLUMNS. If they are a nonrequired entry, leave them blank, and they will be skipped during the import.

Column	Description	Type	Length
A	**First Name**	Text	20
B	**Middle Name**	Text	20
C	**Last Name**	Text	20
D	**Gender**	Text "Male" or "Female"	6
E	Phone Number	Text	20
F	Cell Number	Text	20
G	Email	Text	50
H	**Birth Date**	Date	
I	Address	Text	200
J	City	Text	30
K	State	Text	15*
L	Zip Code	Text	50*
M	Height	Text *No quotes...*	50
N	Weight	Text	50
O	Scholarship	Text True of False	5
P	**Class Year**	Text	50
Q	Last Physical	Date	
R	**ID Number**	Text	15
S	Social Security Number	Text	9
T	Allergies	Text	200
U	Medical Alerts	Text	250
V	Current Medications	Text	200
W	**Team Name 1**	Text	50
X	Team Name 2	Text	50
Y	Team Name 3	Text	50
Z	Contact Name 1	Text	50
AA	Contact Email 1	Text	50
AB	Contact Phone 1	Text	20
AC	Contact Cell 1	Text	20
AD	Contact Relationship 1	Text	50
AE	Contact Name 2	Text	50
AF	Contact Email 2	Text	50
AG	Contact Phone 2	Text	20
AH	Contact Cell 2	Text	20
AI	Contact Relationship 2	Text	50
AJ	Text Msg Address	Text	50
AK	Address2	Text	200
AL	City2	Text	30
AM	State2	Text	15*
AN	Zip Code2	Text	50*
AO	Primary Insurance Company	Text	50*

(more on next page)

ATS Import spreadsheet (xlsx) specifications

Column	Description	Type	Length
AP	Primary Insurance Plan Name	Text	50*
AQ	Primary Insurance Plan Type	Text	50*
AR	Primary Insurance ID Number	Text	25*
AS	Primary Insurance Group No	Text	25*
AT	Primary Insurance Deductible	Text	20*
AU	Primary Insurance PCP Name	Text	50*
AV	Primary Insurance PCP Phone	Text	20*
AW	Primary Insurance PH First	Text	20*
AX	Primary Insurance PH Middle	Text	20*
AY	Primary Insurance PH Last	Text	20*
AZ	Primary Insurance PH Relation	Text	25*
BA	Primary Insurance PH Email	Text	50*
BB	Primary Insurance PH Phone	Text	13*
BC	Primary Insurance PH DOB	Date	
BD	Primary Insurance PH SSN	Text	13*
BE	Blood Pressure	Text	10*
BF	Pulse	Text	5*
BG	Respiration	Text	5*
BH	Vision	Text	5*

Note: State & Zip Code are larger than U.S. Standards to allow for information from foreign countries if needed.

Note: You must use the 1st row of the spreadsheet for headers as indicated in the column descriptions.
- **Items shown in RED are required**
- **Items shown in BLUE are recommended, used for a unique key, but not required.**
- **Items shown in GREEN must be unique for each record IF included.**
- **Records are determined to be "unique" by using the first, middle, last name & birthdate…**

Note: IF last physical is entered an athlete physical record will be added or updated.

Starting the Demographic Import:

To begin the import process; click on the "Import Athlete Demographic Records" menu shown to the right.

* To ensure correct importing and ease of processing, make sure to utilize the Import_Athletes_Template that we have provided. Copy/paste your info into it.
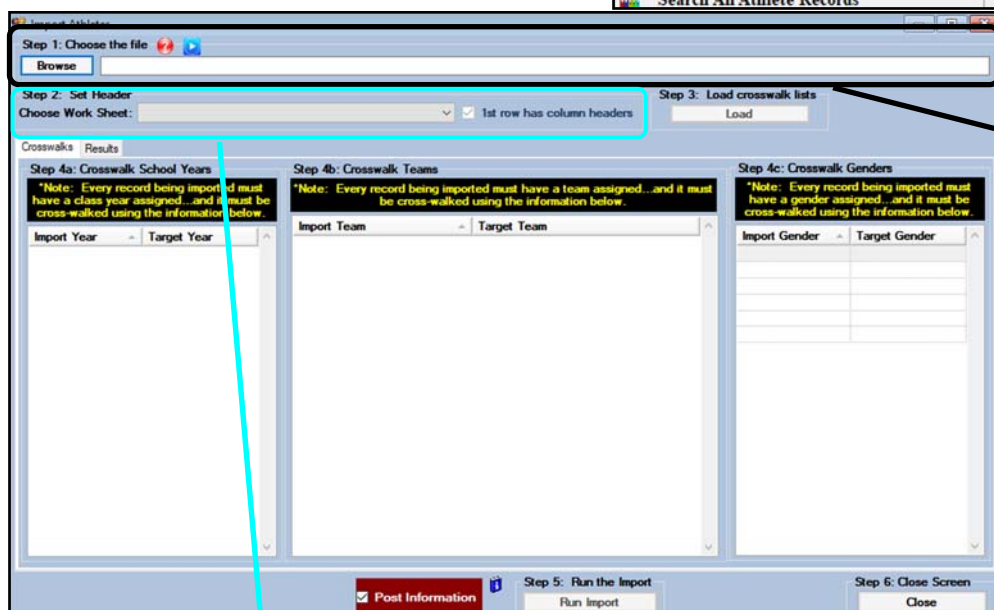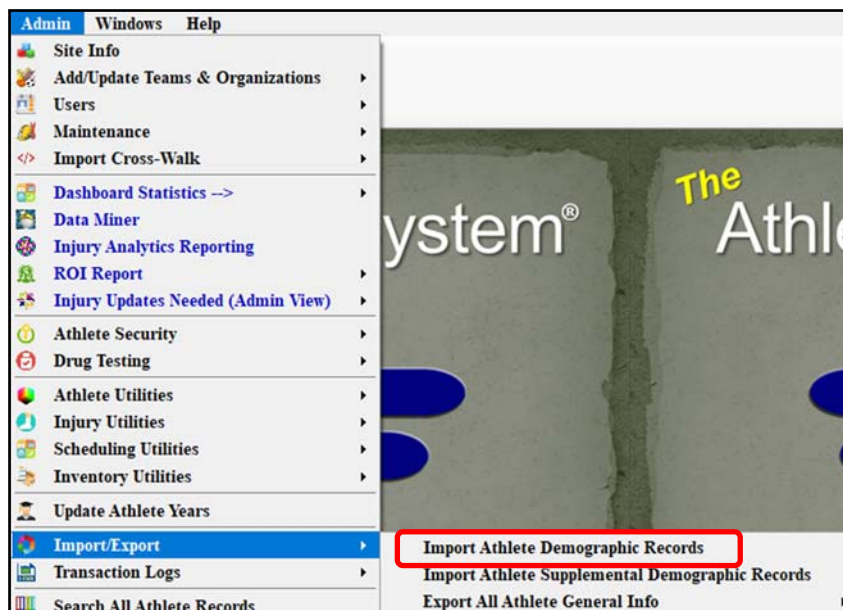
STEP 1:

Click the Browse button to locate and select your spreadsheet. **Only XLSX files can be imported.**

Step 2:

Select a Work Sheet. If you have more that one work sheet in the import file; select the work sheet you want to import.

Note: specifications for this file are found on page 2 of this document.

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Step 3:

Click the Load Button

Import Year & Import Team & Import Genders:

After the file you select loads, you will see a list of "import year years, teams and genders" circled in red. These are the fields that have been loaded from your spread sheet.


Step 4:

Target Year, Team and Gender:

Target Years, Teams and Genders are the entries you have entered into ATS (circled in aqua). These are what you have entered on Pg 2. This allows you to link the names or abbreviations of sports, teams or genders you have in your spreadsheet to the area they need to be linked in ATS.

Select the from the dropdown under the target area and select the corresponding entry to link the "Import item" to. Do this for all of the lines that were loaded in step 3

Step 5:

After you get the crosswalking done in step 4, and ensure you have no blank rows you are ready to run (process) the import.
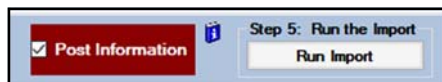
Select the Run Import button and your information will be put into the system.

If you would like a preview prior to actually importing, you can do a test run by unchecking the Post Information.

Once the import process is complete you will see the message box shown here. Records that were imported correctly, you will see on the associated rosters.
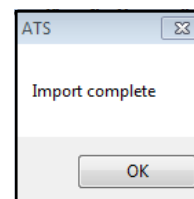
Viewing Results:

After the import is complete, you are able to see the results of the import by selecting the *Results* tab.

All of the results of the import will be here, if the athlete was imported successfully or it there was an error during the import.
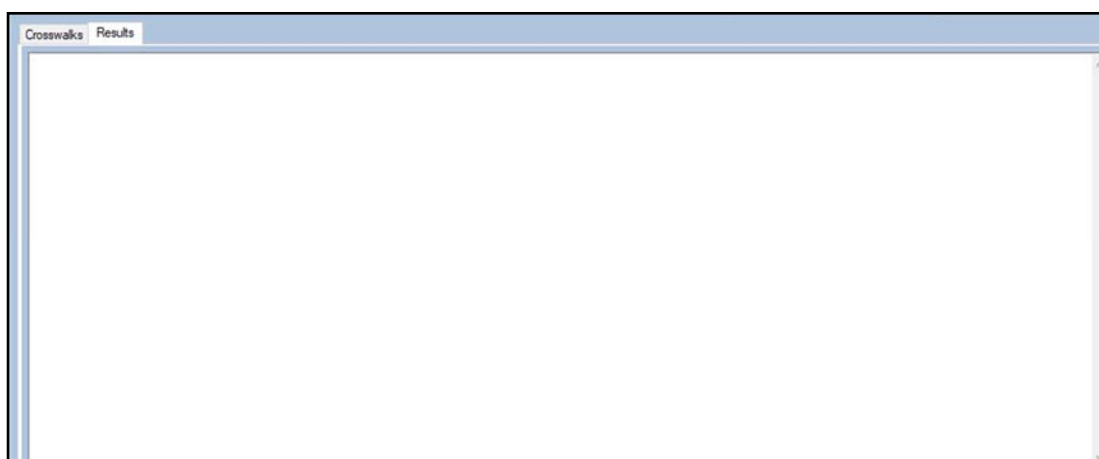
—Should you encounter any errors, please note the message and screen shot it and contact

Keffer Development at 1-888-328-2577

If you have imported athletes and are having trouble finding them, we recommend using one of these search options:

Use the Athletes Tab—> Search Athlete—> either Imported or Marked to be Purged or the Athletes not listed on a team.

If you have admin rights, you can go to Admin—> Search All Athlete Records.
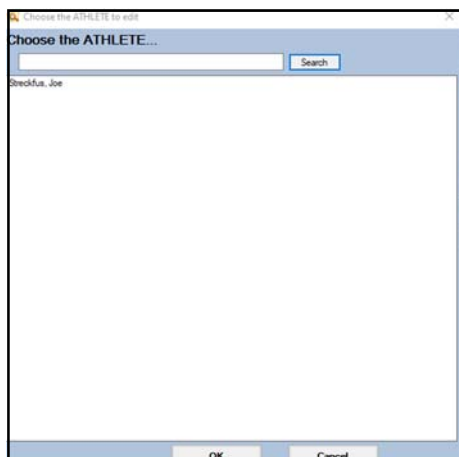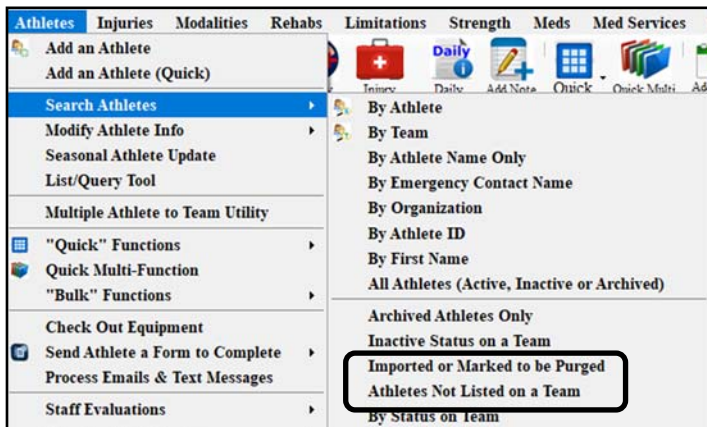
Choose the athlete from the available list, or enter part of the name and click "Search".

The athlete's information will be displayed and may be updated using the Athlete screen shown. Assign appropriate year, teams and make them active. Update any other information as necessary.
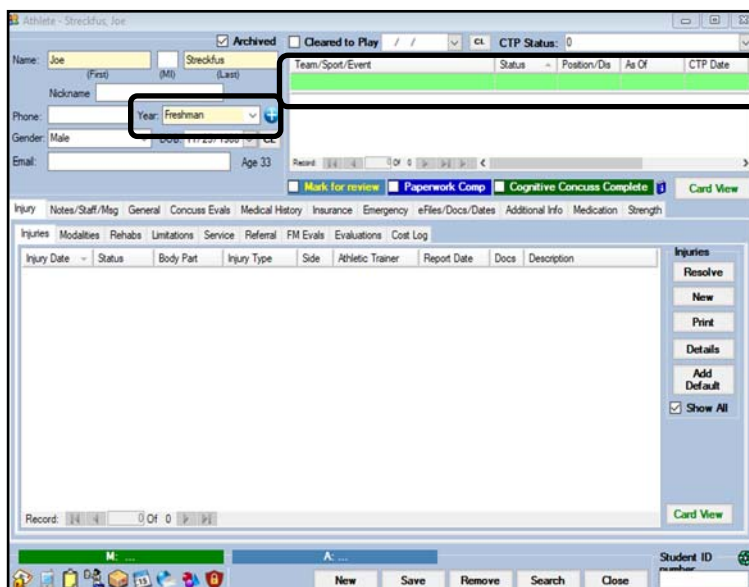
Import from the Staff Portal:

You have the option to import your athlete records via the Staff Portal. To do so click on Admin—> Import Athletes.

If you do not have this option please speak with your system administrator about enabling this feature for you.
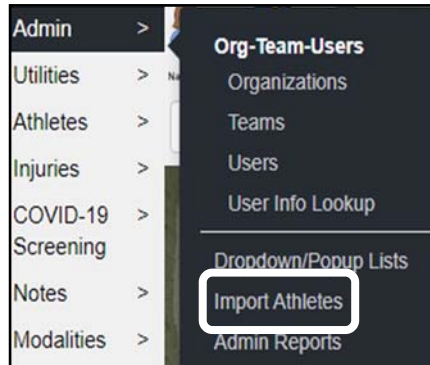
- Your file **must** use an "XLSX" format, and have a header row indicator the items listed below.
- For the Import to run correctly, use the template that is provided in our .Zip file, Import_Athletes_Template, and not your own spreadsheet. If you need the file again please click HERE. DO NOT REMOVE COLUMNS. If they are a nonrequired entry, leave them blank, and they will be skipped during the import.

After the screen shown below loads, the first step is to choose and load your spreadsheet into the import utility. Click "Choose File", select your import sheet and then click continue.
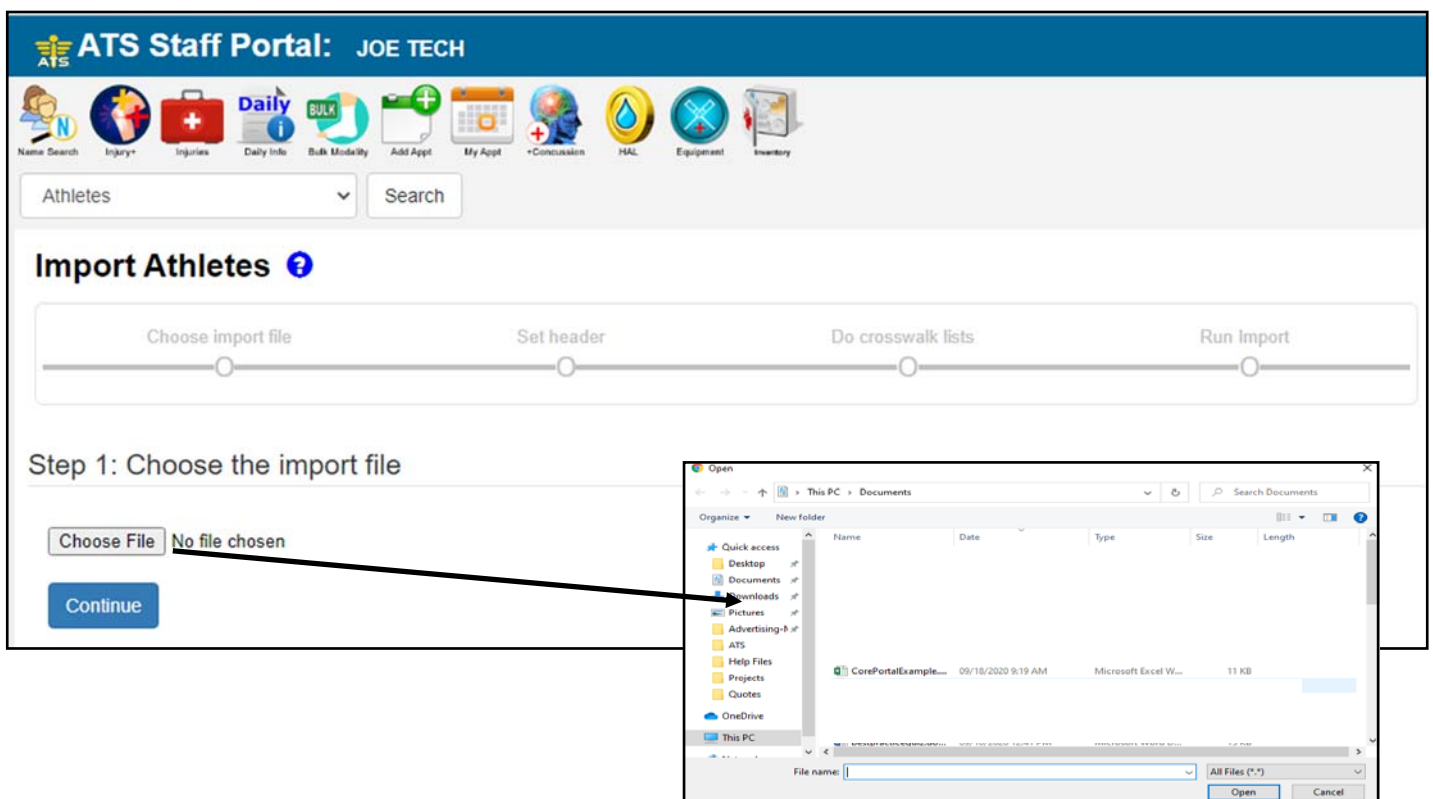
Once you have chosen you file a green checkmark should appear under Choose Import file at the tope of your screen. And you should see the name of your import file in the Step 1 area.

Step 2:

Set Header should now also appear. Completed Roster should automatically load in the Choose Work Sheet box—if it does not click in the box and choose the name/sheet of your spreadsheet. Click continue when ready to move to the next step.

A green check mark should now appear under the Set header at the top of your screen and **Step 3:** Do crosswalk lists should automatically load. See next page on completion of the crosswalk.

Step 3:

When you are doing the crosswalk, this allows your spreadsheet to have different identifiers for the athlete years and teams. The **Import year and Import Team** contain the information in your spreadsheet. The **Target Year and Target Team** are the year and teams that already exist in ATS. This allows you to connect the two.

Be sure to fill in all the dropdown boxes to the correct entry—DO NOT LEAVE ANY BLANK.

Click continue when you have completed all the crosswalks.

Step 4:

A green check mark should now appear under "Do crosswalks lists" at the top of your screen and **Step 4: Run the Import** will appear at the bottom. When you are ready click "Run Import:"
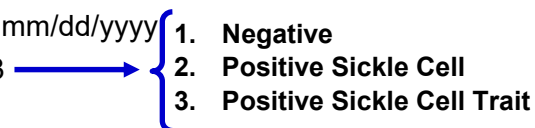

The import will take varied amounts of time depending on the number of athletes being imported— the more athletes the longer it takes. When completed a green notification at the top of your screen will appear confirming the number of athletes imported and Step 5: Close Screen will appear at the bottom.

<u>Athlete Supplemental Spreadsheet Layout:</u>

Column	Field name	Field Type	Length	Notes
A	First Name	Text	20	
B	Middle Name	Text	20	
C	Last Name	Text	20	
D	Gender	Text	6	Gender Abbreviation
E	Birth Date	Date	10	mm/dd/yyyy
F	Academic Eligible	Boolean	1	True/False, T/F
G	Clear To Play	Boolean	1	True/False, T/F
H	CTP Date	Text	10	mm/dd/yyyy
I	Cog Concuss Complete	Boolean	1	True/False, T/F
J	Sickle Cell Date	Date	10	mm/dd/yyyy
K	Sickle Cell Result	Integer	1	Use 1, 2, 3 → 1. Negative 2. Positive Sickle Cell 3. Positive Sickle Cell Trait
L	Sickle Cell Place	Text	50	
M	Alternate ID	Text	12	

Note: You <u>must</u> use the 1st row of the spreadsheet for headers as indicated in the column descriptions.
- **Items shown in RED are required**
- **Records are determined to be "unique" by using the first, middle, last name & birthdate.**

<u>Explanation of the Template:</u>

There are Require fields that must be included with the template to uniquely identify each of your athletes. Columns A (First Name), B (Middle Name), C (Last Name), D (Gender Abbreviation), E (Date of Birth).

Column D Gender— The import will not accept a gender longer than 6 character. This column needs to utilize the abbreviation you have entered in the AthleteGender maintenance screen. Also can be seen by opening the athlete search or team search screens.

Column E Birthday, Column H CTP Date, — should be formatted at mm/dd/yyyy 01/25/2000 to ensure correct importing.

Column F, G, I, Academic Eligible, Cleared to Play, Cognitive Concussion Complete— These columns are designed to import as True or False or T/F. If they are cleared to play that is true. If they are not, that is false.

Column K Sickle Cell Result— In this column you need to enter a number, 1, 2, or 3. The numbers correspond to Negative, Positive Sickle Cell, Positive Sickle Cell Trait.

Supplemental Import:

The Supplemental Import is an additional import to be utilized after you have athletes in the database.

The supplemental import was added to give you the flexibility to import and update any of the optional fields:

- Academic Eligibility

- Cleared to Play and the Cleared to Play Date

- Cognitive Concussion Complete

- Sickle Cell Information— The date of test, the result and the place of testing.

Make sure before running the import that you review the required components for the import. Those are on the previous page.

The supplemental import is available on the Admin—> Import/Export—> Import Athlete Supplemental Demographic Records.
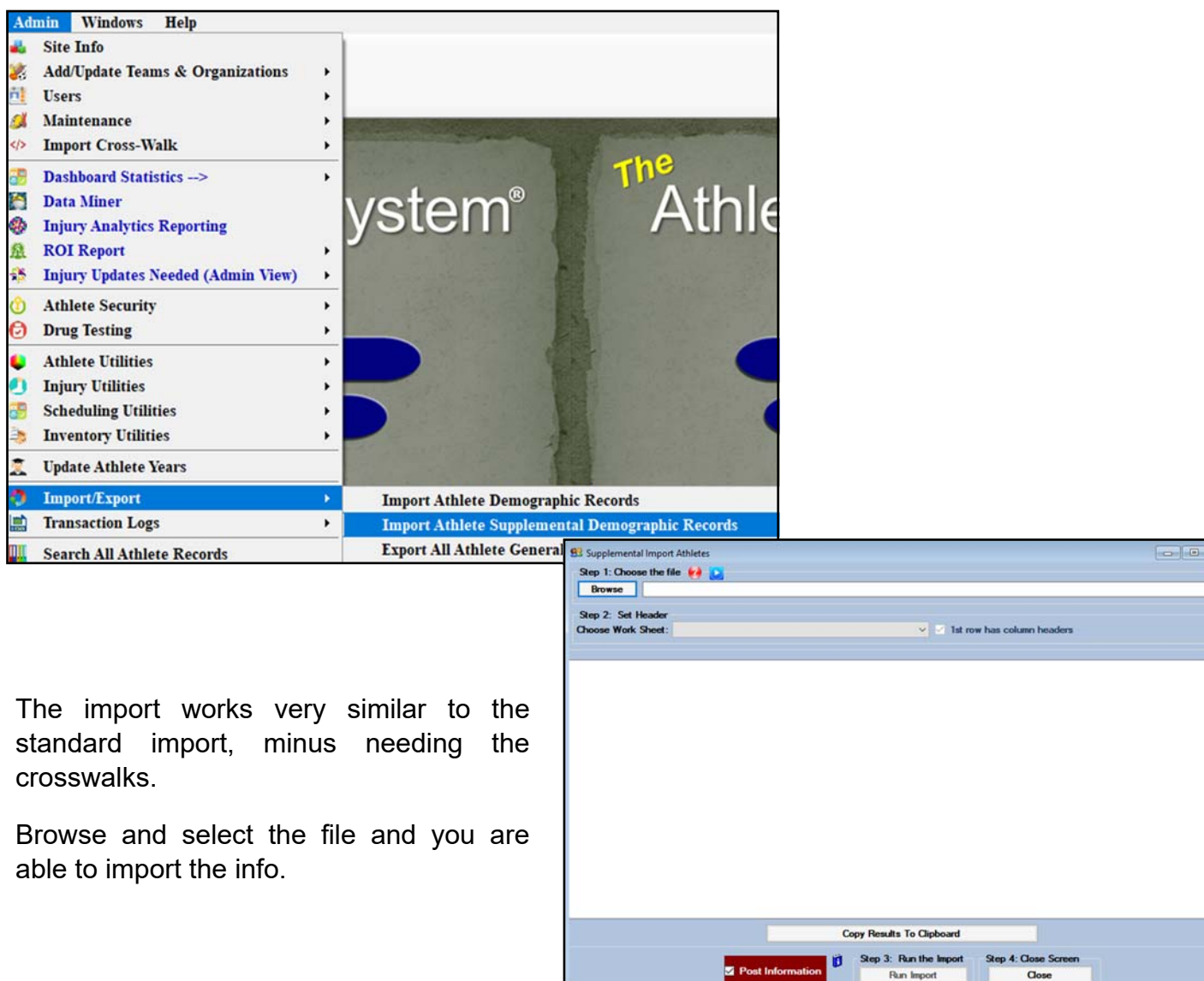
The import works very similar to the standard import, minus needing the crosswalks.

Browse and select the file and you are able to import the info.