

# IMPORT PARTICIPANTS FROM EXCEL

## 1. IMPORT FEATURE

Category Managers, Conference Managers and Registrars<sup>1</sup> have access to an **import participants (XLS)** feature. This feature allows for a quick registration of participants to an event (both UNOG Indico account and non-Indico account users) without individuals having to self-register. Quick registration may prove useful in the following situations:

- when a list of participants and related data already exists in excel;
- when a list of participants already exists in another system and can be exported to excel;
- when self-registration by participants is not possible due poor connectivity; and
- when a Note Verbale exists.

## 2. EXCEL TEMPLATE

The export feature requires that a specific excel template be used. It contains pre-defined columns for “Personal Data” and “Representation Type” information. All information marked mandatory on a registration form **must be mirrored in the excel template**. Rule of thumb – data deemed mandatory on the registration form is equally mandatory on the excel sheet. Column titles shown in bold on the excel template signal what is indicated as mandatory.

The Category Manager, Conference Manager or Registrar may download the template directly from the event’s management area.

The screenshot displays the UNOG Indico event management interface. At the top, there is a navigation bar with the UNOG logo and the text 'THE UNITED NATIONS OFFICE AT GENEVA'. Below this, a breadcrumb trail shows the path: Home > Conferences > UN > UNOG > DCM > JIAMCATT > Second International Forum on World Poverty. The main content area is titled 'Second International Forum on World Poverty' with dates '29 Nov - 30 Nov' and a creation date of '07/11/2018'. A sidebar on the left contains a menu with 'Registration' highlighted. The main area shows a 'Registrants (4)' tab and a table of registrants. A modal window titled 'Import Registrants' is open, showing a 'Choose file to upload (XLS/CSV - max 100 rows)' section with a 'Choose File' button and a link to 'Template for import'. The 'Import' button is also highlighted.

Select	Surname	First Name	Email	Status	Representation Type	Rep. Sub Type	Organisation Represented	Registration Date
<input type="checkbox"/>	Chouari	Houna	houria.chouari@un.org	approved	Government			2018/11/12 18:10

<sup>1</sup> Only if the Registrar has first been assigned the right to do so.

## IMPORT PARTICIPANTS FROM EXCEL

- Click Registration on the menu on the left and then the Registrants tab (Registrars will only see Registration on the left and the registrant's list).
- Click on the tool bar "Import" and in the "Import Registrants" dialogue box "Template for import".

When the excel sheet opens:

- Save it to the hard drive so that it may be worked on.
- Verify that that all **the terms used for data/fields names in the registration form are replicated in the excel sheet**. For example, sometimes a Conference Manager may customize a registration form by changing "Surname" and "Birth Date" (the default terms – see fig.1) to "Family Name" and "DoB" respectively instead. For any such cases, **it is IMPERATIVE to change these terms in the excel sheet to mirror the terms in the registration form** as any discrepancy in terms will result in data being omitted during import. It cannot be stressed enough that the column names in the excel sheet **must mirror exactly** field names in the registration form.

The following is an example of where the field names in the registration form **do not mirror** those in the excel sheet. The excel sheet column names will have to be modified.

### Registration Form

### Excel Sheet

Title	Gender	Surname	First Name	Email	Birth Date
Mr.	Male	Test1	User1	user1@test.com	1991-12-31
Mr.	Male	Test2	User2	user2@test.com	1992-11-30

In this example the terms "Surname" and "Birth Date" **MUST** be changed in the excel sheet to the terms used in the Registration form on the left i.e. "Family Name" and "DoB".  
Rule of thumb: terms in the excel sheet must match those in the Registration Form.

## IMPORT PARTICIPANTS FROM EXCEL

- **Add** to the excel sheet the personal and representation type information available to you on the participants.
- **Mandatory information** required in the registration form (areas marked “\*”) **must be included in the excel sheet.**
- **In addition to indicating the Representation type, you must indicate the dependencies as well which concern the columns: Organisation Name, Rep. Sub Type, and Country Representative.** E.g. for the representation type Government, a country should be listed in the Country Representative column. Or if the representation type is United Nations, a UN entity should be listed in the Rep. Sub Type column. Or if the representation type is Academia an institution should be entered into the Organisation Name column.
- In the absence of mandatory information, you may input false information while respecting the required formats (i.e. date format is YYYY-MM-DD, email user1@example.org). This will prevent problems with the import.
- **Non-mandatory information** in the registration form may be either included or omitted in the excel sheet. Be aware that in omitting non-mandatory information, it will not be available later for statistics e.g. if no data on gender is included in the excel sheet, statistics on participant gender will be unavailable.
- In addition to the default columns on the excel sheet, additional columns may be **added**. Remember to name the new column(s) in the excel file the same as what terms are used on the registration form.
- **Pictures and File Uploads** cannot be added to the excel file.

Fig.1: Default personal and representation type terms for data/info used in a Registration Form and the excel file <sup>2</sup>

Field (Term)	Mandatory/Optional	Notes	Example
Title	as specified in RF	Values expected : predefined values in drop down list in the template.	Mr., Ms.
Gender	as specified in RF	Values expected : predefined values in drop down list in the template.	Male, Female
Surname	mandatory	Values expected : free text. No length limit, recommendation to restrict to 40 characters	Test1
First Name	mandatory	Values expected : free text. No length limit, recommendation to restrict to 40 characters	User1
Email	mandatory	Values expected : email in format xxx..@yyy... No length limit, recommendation to restrict to 50 characters	user1@test.com
Position	as specified in RF	Values expected : free text.	Head of Organization

<sup>2</sup> Sample list of expected values for the columns: Title, Representation Type, Representation Subtype, Contact Type and Country in the excel file can be found in [IMPORT-predefined-values.xlsx](#) ⚠ This list is valid at the time of writing and is subject to change. It is provided here only as an example. To see the up-to-date list of expected values, open the XLS Import Template and check the dropdowns of the concerned columns.

## IMPORT PARTICIPANTS FROM EXCEL

Institution	as specified in RF	No length limit, recommendation to restrict to 40 characters Values expected : free text.	Diplomat University of Toronto
Organisation Name	mandatory	No length limit, recommendation to restrict to 40 characters Values expected : free text. No length limit, recommendation to restrict to 40 characters. This information indicates the Organization represented by the registrant.	IBM Permanent Mission International Center of Trade & Development
Representation Type	mandatory	Values expected : predefined values in drop down list in the template. This information indicates the category of the participant (government delegation, private sector, NGO, press ...). It is used by Security to determine the type of badge for the participant. All participants have to be classified in one of those categories.	Government, NGO, Private Sector
Rep. Sub Type	mandatory if Representation type is UN	Values expected : predefined values in drop down list in the template. This information is a complement to the "Representation type" and is required <b>only for:</b> "Representation type = United Nations"	ICT (Programmes and Funds)
Country Representative	mandatory if Representation type is Government	Values expected : predefined values in drop down list in the template. This information is a complement to the "Representation type" and is required <b>only for:</b> "Representation type = Government"	Algeria
Birth Date	as specified in RF	Values expected : date in format YYYY-MM-DD	1991-12-31
Passport Origin	as specified in RF	Values expected : predefined values in drop down list in the template. This is the nationality from the passport/ID card of the participant.	Italy
Passport ID	as specified in RF	Values expected : free text. No length limit, recommendation to restrict to 40 characters	IT01234
Passport Expire	as specified in RF	Values expected : date in format YYYY-MM-DD	2020-11-29
Address	as specified in RF	Values expected : free text. No length limit, recommendation to restrict to 60 characters	Avenue de Nullpart 63
City	as specified in RF	Values expected : free text. No length limit, recommendation to restrict to 40 characters	Geneva
Country	as specified in RF	Values expected : predefined values in drop down list in the template. This is the country related to the professional address.	Switzerland
Phone	as specified in RF	Values expected : free text. No length limit, recommendation to restrict to 40 characters	01271512345

## IMPORT PARTICIPANTS FROM EXCEL

---

### 3. IMPORT PROCEDURE

- In the registrant's list, the Export/Import bar menu, click "*Import*" and click "*Choose file*".
- Select the excel file from the hard drive and click "*Upload list of registrants*".

### 4. NOTES

- Indico will automatically generate the file and **report** on how many users have been successfully imported, rejected and the reason for rejection so that records may be rectified and import repeated.
- If the **excel file** contains a participant **already registered** for the event in Indico, the record will not be imported.
- If the **excel file** contains the **same email for different participants during import**, only the first record where that email appears will be imported. The rest will not.
- If the **excel file** contains the email of an existing Indico user, that record will not be imported (even if the name of the person you are trying to import is different).
- Participants imported **with an Indico account and who successfully registered before for an event** will have their **picture added automatically** to their registration.
- Participants imported **without an Indico account will have a profile created for them automatically during import**. Their user ID will be the email address (valid or faux) used to register them with. Security will add a picture to their account upon collection of their badge.
- Unlike participants who register themselves directly for an event in Indico, participants **registered via import do not receive a registration confirmation email**. Those for whom are imported with a valid email address, you may inform them of their registration using Indico's email feature. You may also advise them of the creation of their account and that they can set a password using the "*Reset password*" function on the log in page using their email address as the user ID.

---END---