Importing Information into Lamplight

In Lamplight we identify two different types of information. Information you hold about people, and information you hold about the activities you do with them. You can import information about people yourself, using an excel spreadsheet. We'll show you how to do this below. Information about the activity you do with people though, can only be imported by Lamplight, because of the complexity involved.

Preparing information

You import information directly from a spreadsheet, saved in a format called .csv. You can import information into standard and custom profile fields, but not repeating fields. Your spreadsheet should look like the example below, with fields across the top, and field content below in each column. Essentially, you match the column header for each column exactly to the field as it's named in Lamplight. You may want to copy the text from Lamplight to be certain.

You don't need to enter tab information, just the name of the field. You can only import one profile type (person > client, person > volunteer, or organisation > organisation for example) at a time, so you'll need a separate sheet for each.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	First Name	Surname	Gender	Postcode	Phone	Mobile	Email		DateofBirth	Address Line 1	Address Line 2	Current Record	Sexual Orientation	Religion
2	Ginevera	Weasley	Female	L12 0DJ	01451 555 288	07777888125	ginny@lamplightdb.co.uk		17/05/1985	24 Happy Avenu	Kensington	Yes	Not declared	Muslim
3													
4													

You should end up with a spreadsheet, with a column for each field you wish to import. Once completed, save your sheet as a CSV file. This will only save the current Excel tab, so don't try to put multiple sheets in the same workbook.

Field Headers

The built-in headers that Lamplight will recognise for profiles are:

- id

- name (the full name of an organisation – not for use with people)

- alternative_name

- title – text values matching values in the Title list

- suffix – text values matching values in the Suffix list

- first_name

- surname

- current_address_line_1 => for address lines 1 - 5

- postcode

- phone

- mobile

- email

- web

- allow_email (allowed values 0 or 1 for no or yes respectively)

- allow_post (allowed values 0 or 1 for no or yes respectively)

With the publishing module:

- publish (allowed values 0 or 1 for no or yes respectively)

- publish_summary

- publish_update

Columns can be in any order, and you don't have to have them all if you don't need them. Additional columns for custom fields can be added to this list, but they will depend on your system.

Formatting Tips

- Fields are case sensitive. Copy them character for character, space for space, with the same capitals and lower-case letter as in the database. (Lamplight will attempt to guess where case is wrong though.)
- You can download all the field names and other settings in the system admin menu to help with this.
- If your field allows multiple options, you separate them with a ; (semi-colon) and no spaces. For example yes;no;not applicable. You must make sure that the values in drop-down type fields match what you have in Lamplight exactly. If you have 'male' and 'female' as options in

Lamplight, and 'm' and 'f' in your spreadsheet, the data won't be imported.

- Checkboxes can be imported simply as 'Yes', or blank for no.
- For multiple entry radio buttons and checkboxes, simply enter the values.
- Dates should be entered yyyy-mm-dd format. Excel stores dates as numbers (and just displays them as dates), but you will need them as text strings. You can use the Excel function TEXT for this: `=TEXT(A2, "yyyy-mm-dd")` will format the date in cell A2 as a string.
- Number fields should be converted to 'text only' in Excel (Cells, format, number), or they will lose the 0 at the start of the number.

Once you've saved your sheet as CSV, you may want to re-open it, and check everything looks as it should.

You can also import information into existing profiles. This does tend to be more complex, and we don't tend to recommend it as a regular process.

Lamplight can match existing profiles using the Lamplight ID field – this is a unique reference for each profile in Lamplight. The simplest way to find this is to use a group/list and dataview, although you can also find the ID number manually.

Downloading names and IDs

Create a dataview which shows you the ID number for each profile. You may also want to add the fields you wish to import. Create a group/list of the individuals whose profiles you wish to import data into, and then view it with the dataview. Make sure that you have selected to 'Show All' records at the top of the table, then using the 'Download' link at the bottom left of the table, download the sheet and open it in Excel.
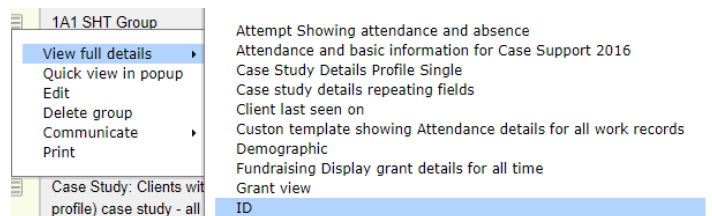
This now shows you the name and ID number for each profile. From here you can match your information for import to the ID for the profile.

Adding the ID manually

You can also add the ID number to your spreadsheet manually. You could use the dataview to get this information. Alternatively, if you go to each profile and hover over the name (e.g. 'Profile for Sam Carter'), Lamplight will show you the ID number.

Completing

Once your spreadsheet is formatted as previously described, with the addition of the ID code for each profile, you may choose to delete the name columns as the ID number now serves as your key identifier.

When you have prepared your spreadsheet of data you can upload it into Lamplight. **We strongly recommend that you do a test first** – take the first three or four rows from your spreadsheet into a separate test file and upload that first.

In Lamplight, as a System Administrator:

- Go to 'admin' > 'system administration'.
- In the 'File transfer' section, choose 'Upload profile data into your system.'
- Choose the type of profiles you are importing.
- You can give the 'source' of your data a name if you choose. This means that if you import often from the exact same format spreadsheet, your previous matching choices are saved for next time. If this is a second import of the same information, select the previous source.
- Click on 'Choose file' and navigate to your CSV file.
- Click 'upload file'.

On the next page, you will see fields Lamplight has been able to match, and what it's matched them to. Please check these through, scrolling right if needed.

It will also show you any fields it's not been able to match. At this point you can check those fields, correct your spreadsheet and re-start the import.

It's important that all your information is matched to a field. If you are importing to existing profiles, it's essential the ID numbers are correctly identified.

Upload data to insert into Lamplight

The following fields have been matched to Lamplight fields OK.

The table below shows the first few rows of your data file and the fields we've matched them to in Lamplight.

Name (matched to Name)	Id (matched to Id)	This is a number field (matched to Thisisanumberfield)
Cho Chang	36	22
Felix Summerbee	49	11

Options

- Validating data

If you select this, the system will ensure that all the data is checked before entering, and will list any records that were not imported (as a whole) due to invalid data.

- Duplicate Data

This will check each name and address for duplicate information.

- Titles and Suffixes

Be cautious, as this will also add any typos as new title or suffix information. For example, 'Mrrs' would be added as a new option.

- Overwrite existing records

This matches the ID number in your spreadsheet to a profile in the system, and overwrites existing information (including blank information) with the new data.

Upload

Click 'upload'. You can now see what the system has done.

At this point, we suggest you open a second browser tab, and look at the imported information. If for some reason you're not happy with the upload, you can come back to your original tab, and use the 'Undo' button to remove the imported data. Once you leave this page, you can no longer undo.

Some simple questions, if your import isn't working

- Are all your columns matched to fields in Lamplight? If not, go back and see if you can see any difference between the column name in your spreadsheet and the field name in Lamplight.

- Open the CSV file using Notepad (or any basic text editor) and see what has been saved. You may see a difference from what is displayed in Excel.

- If your date columns do not match, or are different when viewing the CSV as plain text, click in the cell in excel and see what it shows you. You may need to change the field type to text to avoid excel formatting the date differently.

- Sometimes, but not often, a translation in the system could affect the name used to import. For example, if 'Last name' in your system has been renamed to 'Family name'. Check in Admin > System Administration > Customise Lamplight > change terms used in Lamplight for en_GB. You should use the untranslated terms.

If you are seeking to upload to existing profiles

- Have the ID numbers been clearly matched to the correct profile?

- Are you uploading to the same role as the profile in the system((person > client, for example)?