Bulk Uploads

Reference	**OPS-2024.06.09.GBL**
Department	Operations
Audience	Clients creating bulk upload files to provision iBlüm systems
Last Updated	June 2024

OVERVIEW

This document describes all the bulk upload formats for uploading various data in the iBlüm servers.

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01   Parent Child Records bulk upload

Bulk-upload excel file top level specifications:

- All cell contents are case sensitive, and data will be uploaded as they are presented. *James McAvoy* is not the same as *James Mcavoy*. This may cause conflicts when cell data is used to match classroom names.
- The excel tab that contains the rows to be imported must be named as **Data**
- The first row is the header, and the titles must not be changed to anything else. The program uses this name to identify individual fields to create a family account and their children

There are no restrictions on how to arrange the columns in this table, as the system uses the header to identify fields and where they go in an account.

BEST PRACTICE - It is recommended that you use the excel sample file provided and add data after the header row.

Excel File Records

Field No.	Column name in row 1 - must have the same heading as below. (no space(s) or extra characters at the end)	M(andatory) / O(ptional)	Data type	Column Content - Other Cells can be empty and its content will not be uploaded.
1	'Center Name'	M	ANS	Name of the Facility – e.g. *Crèche Anne Sylvestre* If there are accents/special characters in the name, then ensure that they are identical. E.g. *Crèche Anne Sylvestre* is **not** the same as *Créche Anne Sylvestre*
2	'Parent #1 ID'	O	N	If provided, Parent #1 ID can be filled in as an incremental numeric value. If empty, parent ids will be created by the system. ID is a number used during the upload process. The numbers for each row, must be entered in sequence and can begin with any number. e.g. 1001, 1002, 1003…etc. Note: The cell cannot contain an *Excel* function to fill in those numbers (e.g. cell value for $B2 '= $B1 +1').
3	'Parent 1 Salutation'	M	ANS	Salutation is one of: Mr. Mrs. Ms. Dr.
4	'Parent 1 Last Name'	See Note 1 and 2 below	ANS	If the **Parent 1 Last Name** is provided, then **Parent 1 First Name MUST** be provided.
5	'Parent 1 First Name'	See Note 1 and 2 below	ANS	If the **Parent 1 First Name** is provided, then **Parent 1 Last Name MUST** be provided.
6	'Parent 1 e-mail address'	M	EML	Valid email address, e.g. john.smith@domain.com
7	'Parent 1 Phone number'	M	N	Full cell phone number without country code
8	'Parent 2 Salutation'	M	ANS	Salutation is one of: Mr. Mrs. Ms. Dr.
9	'Parent 2 Last Name'	See Note 1 and 2 below	ANS	If the **Parent 2 Last Name** is provided, then **Parent 2 First Name MUST** be provided.
10	'Parent 2 First Name'	See Note 1 and 2 below	ANS	If the **Parent 2 First Name** is provided, then **Parent 2 Last Name MUST** be provided.
11	'Parent 2 e-mail address'	M	EML	Valid email address, e.g. jane.smith@domain.com
12	'Parent 2 Phone number'	M	N	Full cell phone number without country code

Field No.	Column name in row 1 - must have the same heading as below. (no space(s) or extra characters at the end)	M(andatory) / O(ptional)	Data type	Column Content - Other Cells can be empty and its content will not be uploaded.
13	Address	M	ANS	Any string of characters representing an address which is used as the billing address of the account. Do not include country code
14	'Child1 Room'	M	AN	The room name is the name of the classroom in which Child1 is currently enrolled and is case sensitive and must match the room names created in the system. Do not put in any additional trailing spaces in the room name. e.g. '0-2 ANS ' e.g. 'Senior' is **not the same** as 'SENIOR' e.g. '2-4 YRS' is **not the same** as '2-4 YRS ' (the second one has an extra space character) e.g. '0-2 YRS' is **not the same** as '0-2 Yrs' (case change for 'rs')
15	'Child1 Last Name'	M	ANS	Both the last name and first name of the child must be provided.
16	'Child1 First Name'	M	ANS	Both the last name and first name of the child must be provided.
17	'Child1 Date of Birth'	M	D	The system does not validate a child's birthdate other than it is in the correct format. Any date that is valid is acceptable. E.g. if date provided is 19/12/2000 (i.e. a child is 22+ years old), the system will still accept this data.
18	'Child1 Sex'	M	C	'M' or 'F' for Male or Female
19	'Child2 Room'	O	AN	Refer to Content Description in Field 7
20	'Child2 Last Name'	O	ANS	Refer to Content Description in Field 8
21	'Child2 First Name'	O	ANS	Refer to Content Description in Field 9
22	'Child2 Date of Birth'	O	D	
23	'Child2 Sex'	O	C	Refer to Content Description in Field 11
24	'Child3 Room'	O	AN	Refer to Content Description in Field 7
25	'Child3 Last Name'	O	ANS	Refer to Content Description in Field 8
26	'Child3 First Name'	O	ANS	Refer to Content Description in Field 9
27	'Child3 Date of Birth'	O	D	
28	'Child3 Sex'	O	C	Refer to Content Description in Field 11

M(andatory) / O(ptional) column

If a field is mandatory (M), then it must be filled as per format for the Data Type explained below. If a field is optional (O), then you can leave the cell blank or empty.

Data Type column and associated format

ANS – Alphanumeric and Special – letters in Upper Case and Lower Case, numbers and special characters such as $, %, !, (,) and accented characters – ü, è, é, ô, ö, etc.

AN – Alphanumeric only – letters in Upper Case and Lower Case, numbers

C – Character, single character. **Do not** add any trailing space characters.

EML – Valid allowed verifiable email address.

N – Numeric value with no decimals – e.g. 1000.

D – Date information should be in format ISO format i.e. yyyy-mm-dd. **Do not** add any trailing space characters in this e.g. "2022-12-17 " (extra space after 17, will cause upload errors)

Note:

1. Fields 3 and 4 are mandatory if fields 5 and 6 are empty

2. Fields 5 and 6 are mandatory if fields 3 and 4 are empty

3. Fields 7 through 11 are mandatory if the family has a first child in the facility

4. Fields 12 through 16 are mandatory if the family has a second child in the facility

5. Fields 17 through 21 are mandatory if the family has a third child in the facility

Related Documents

References