

Tutorial

Objective: Importing People using the Import Request Tool

Step 1: In the **People** section

- a. Click the **Listing** tab
- b. Click the **Black Arrow** in the **Mark** column. (Fig. A)

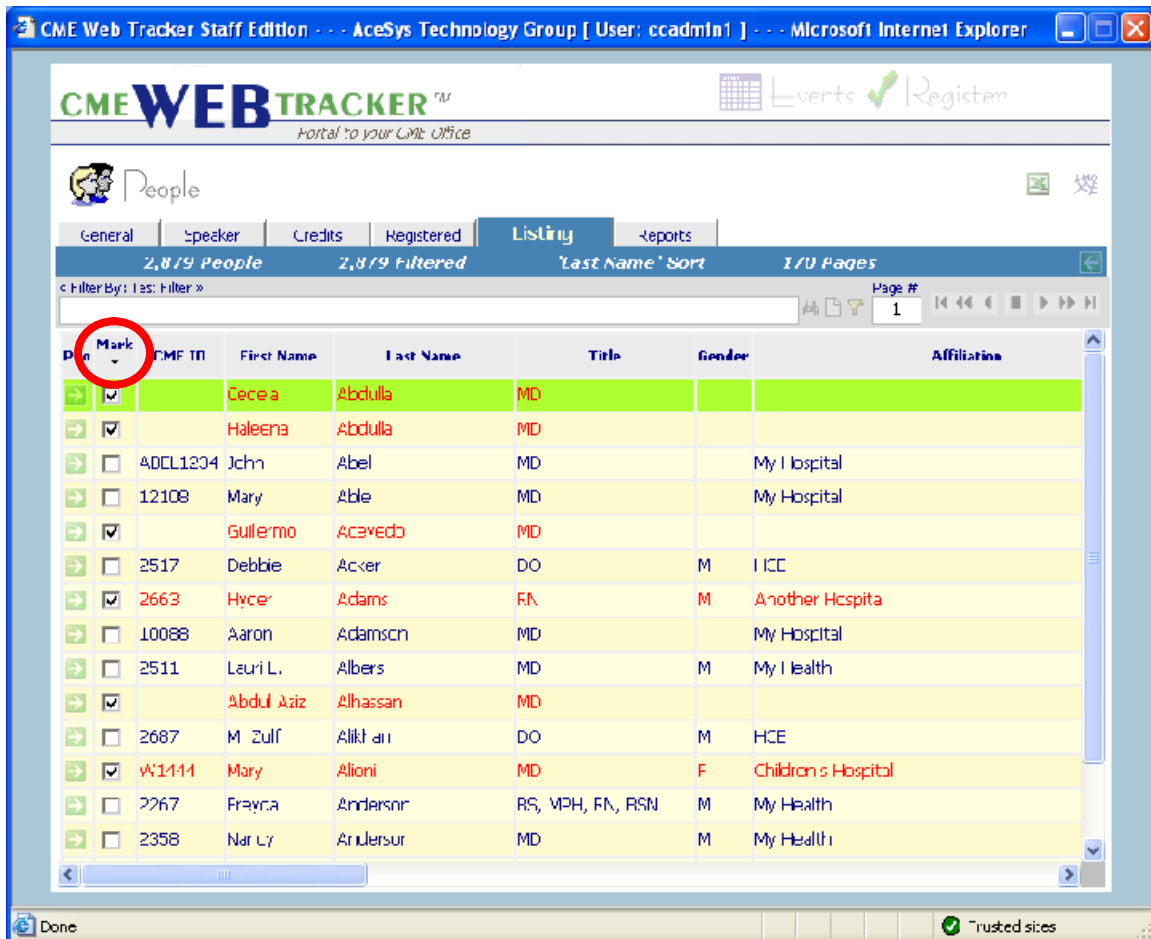


Fig. A

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Step 2: The **Batch Mark** popup appears.

- Click the **Radio Button** next to **Unmark All Records**.
- Click the **Pink Checkmark** to select.
- All records are now **Unmarked**. (Fig. B)

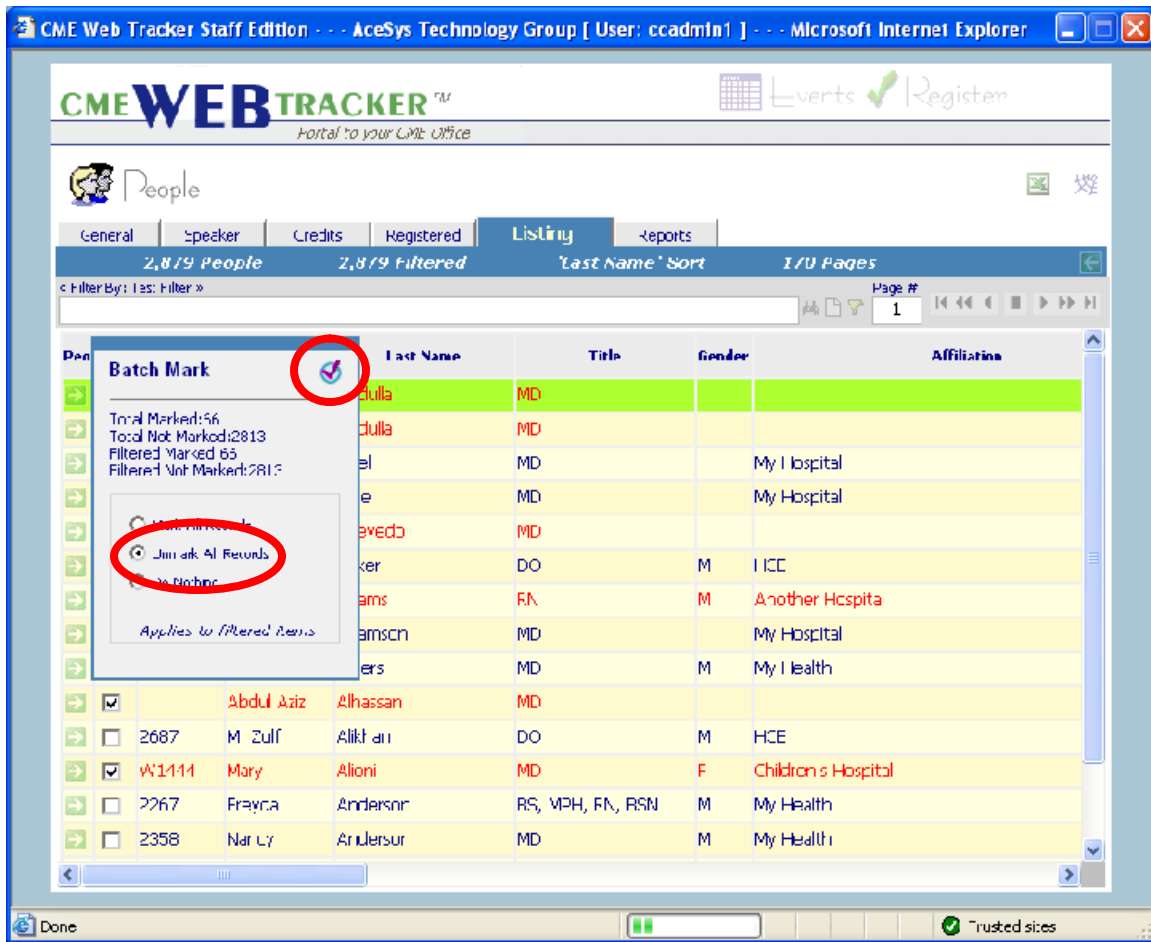


Fig. B

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- Step 3:** Go to the **WEB Tracker Start** page.
a. Click **People Import**. (Fig. C)

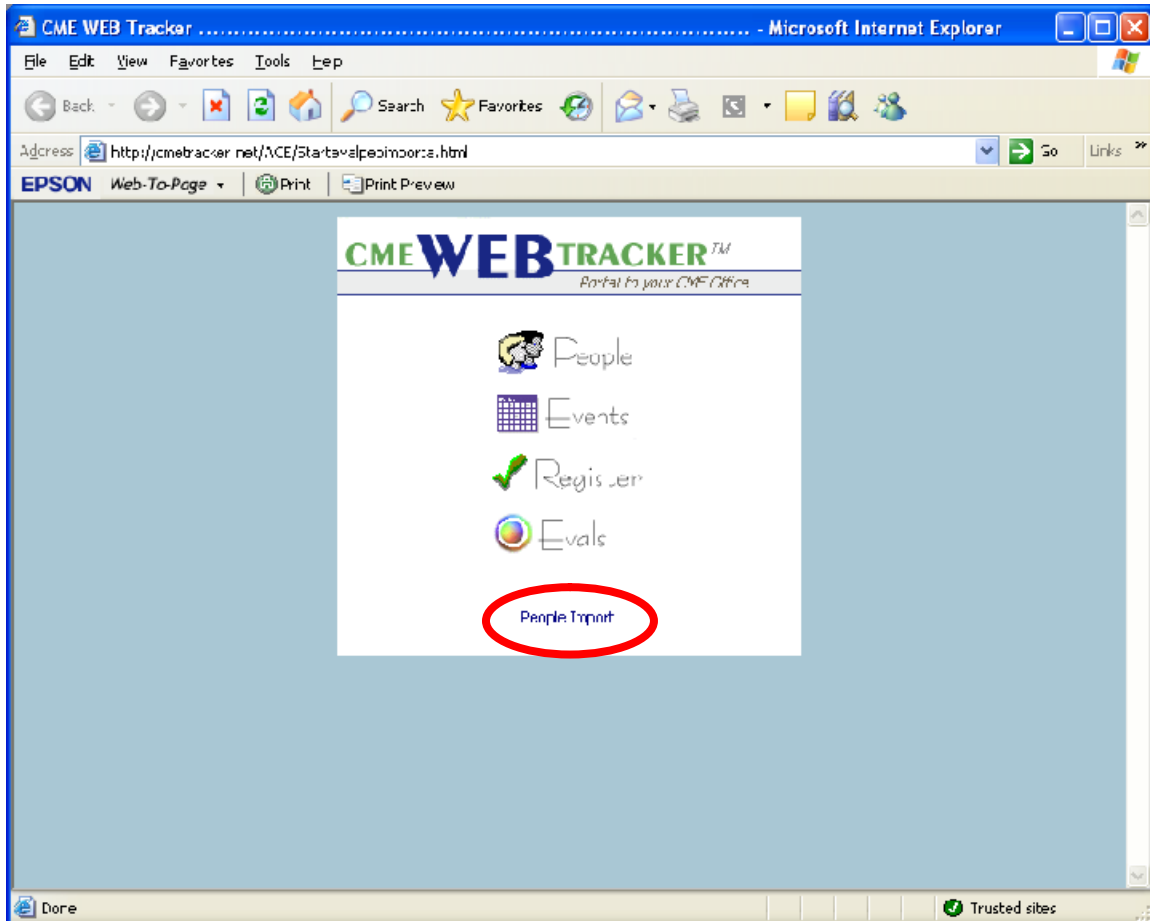


Fig. C

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Step 4: The **Import Request** page appears giving you instructions on how to Import People

- a. Click to **check** the box next to **Log New People Added**. (if you want to have the imported people marked in your people listing).
- b. Have a **Spreadsheet** prepared for Import.
- c. Open Your **Spreadsheet** or Click on **Spreadsheet Template** to open a Spreadsheet that is ready to use. (For this example we will be using the Spreadsheet Template). (Fig_D)

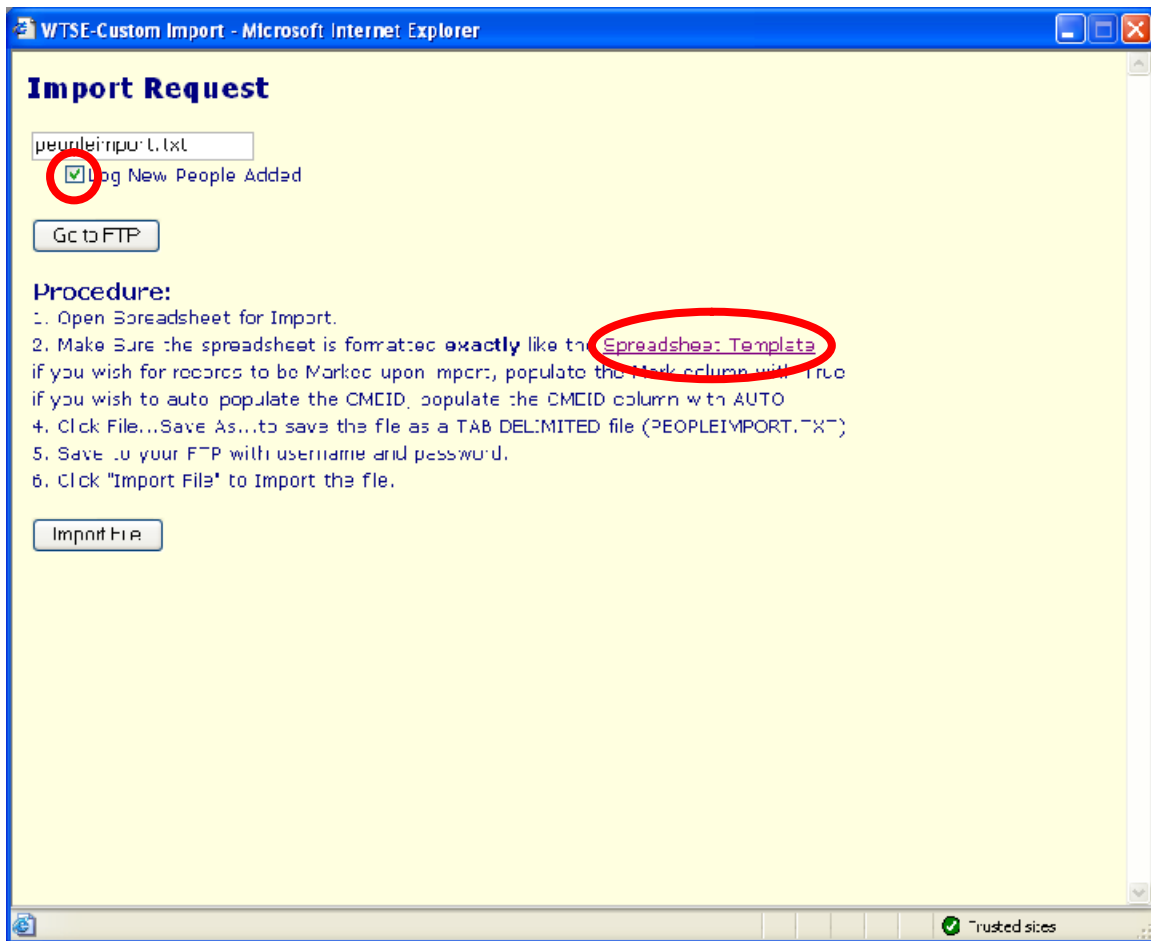


Fig. D

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Step 5: The **Spreadsheet Template** now appears.

- a. If you wish for records to be **Marked** upon import populate the **Mark column** with **True**.
- b. If you wish to **Auto-populate** the **CMEID** populate the **CMEID column** with **AUTO**.
- c. Add any other information such as Title, Credit Eligibility etc. that you want to have included in the Import. (Fig. E)

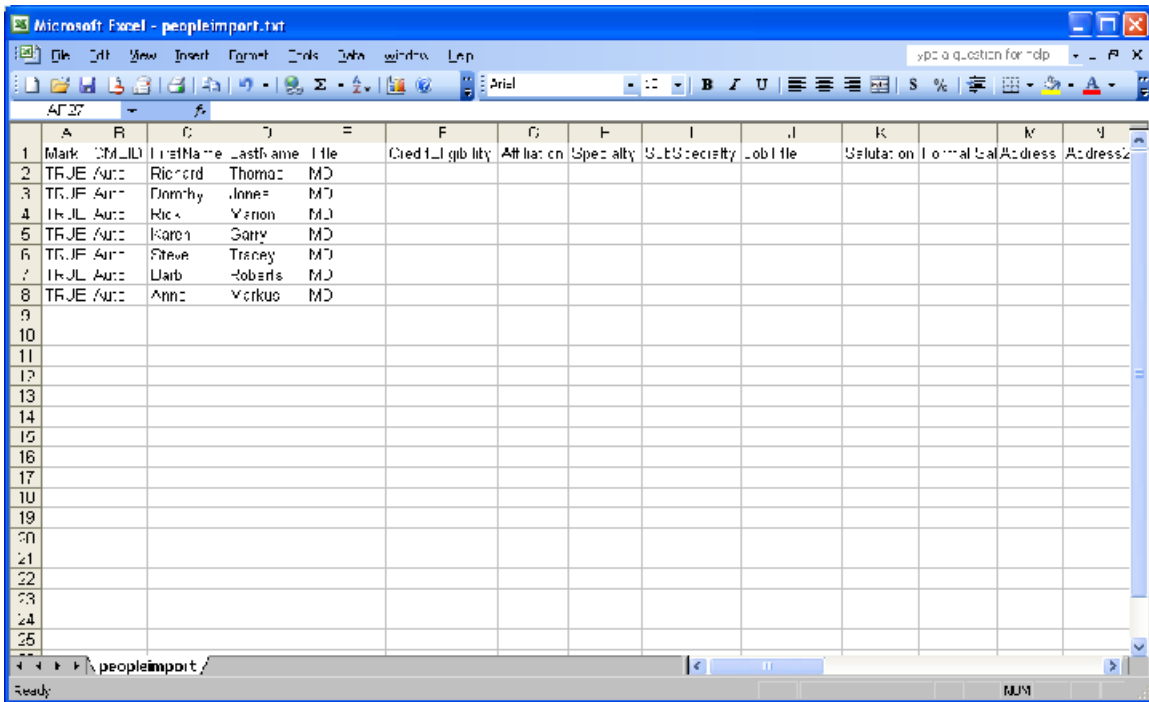


Fig. E

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Step 6: You are now ready to save to your **FTP** using your User name and Password

- a. Click **File**.
- b. Click **Save As...** (Fig. F)

Note: Your User name, Password and FTP site will be provided by your WEB Tracker Staff Edition Support Team.

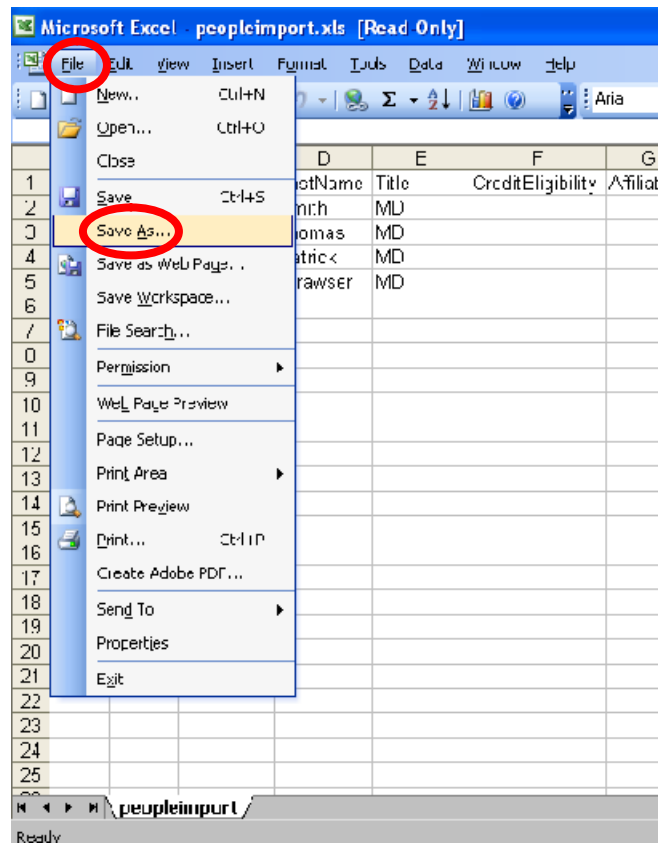


Fig. F

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- Step 7:** The **Save As** popup appears.
- Click the **arrow** next to **Save as type:**.
 - Choose **Text(Tab delimited)(*.txt)**.
 - Click the **arrow** next to **Save in:**.
 - Click your **FTP folder** to select. (Fig. G)

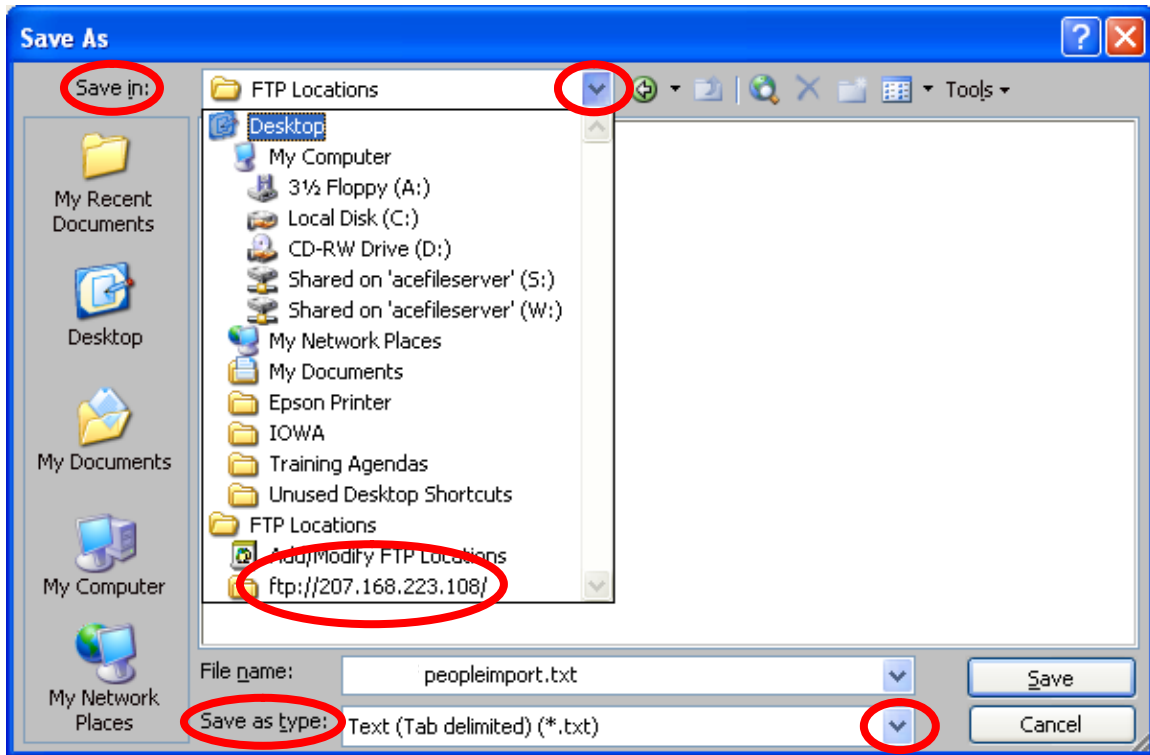


Fig. G

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Step 8: Click **Save**. (Fig. H)

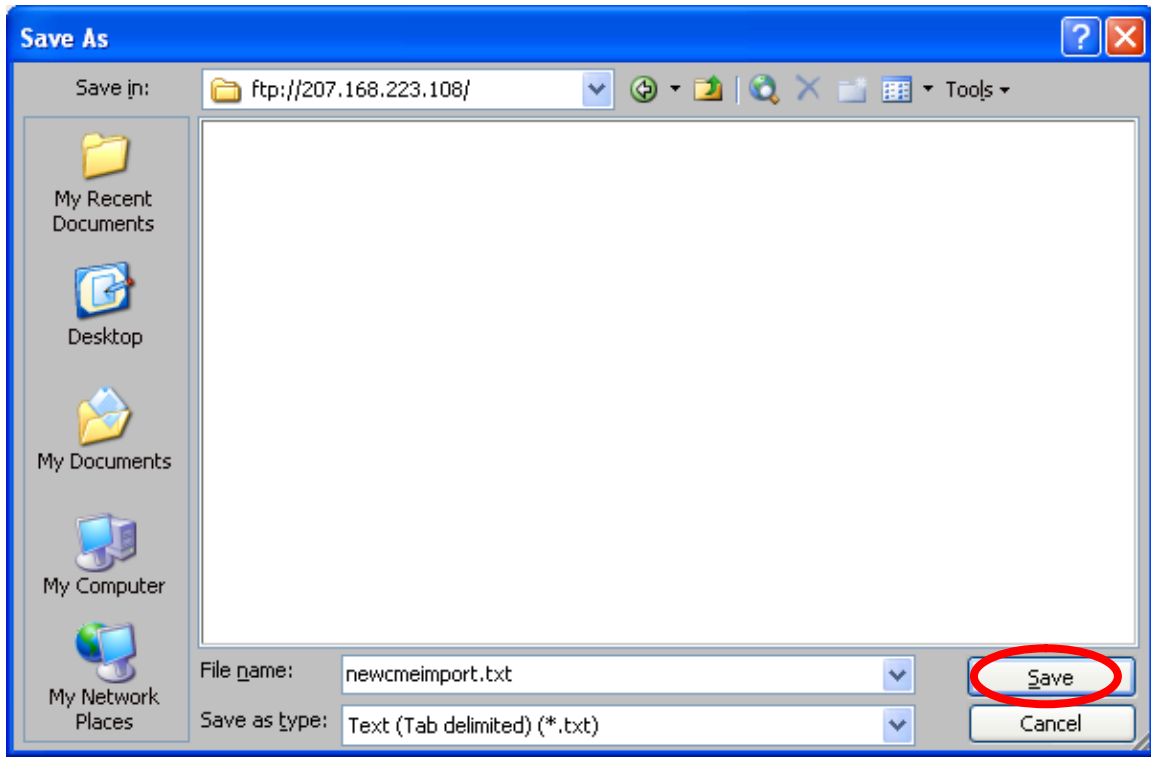


Fig. H

Step 9: This **Microsoft Excel** popup appears.

a. Click **Yes**. (Fig. J)

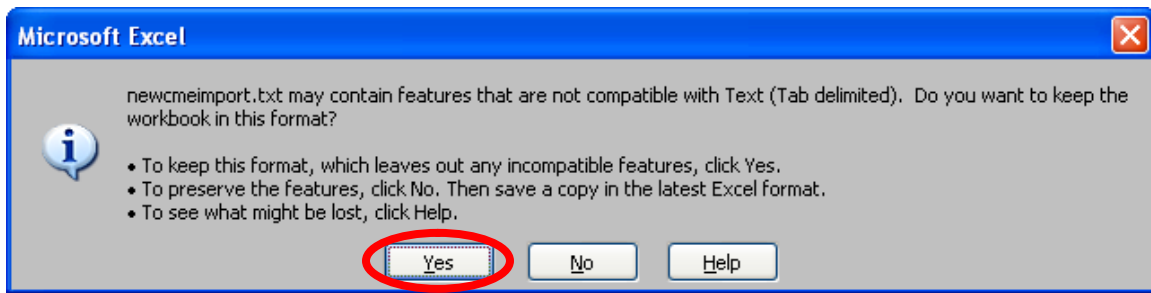


Fig. J

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Step 10: You have an **Import Spreadsheet** now located in your **FTP** site.
a. Click **Import File** to import the file. ([Fig. K](#))

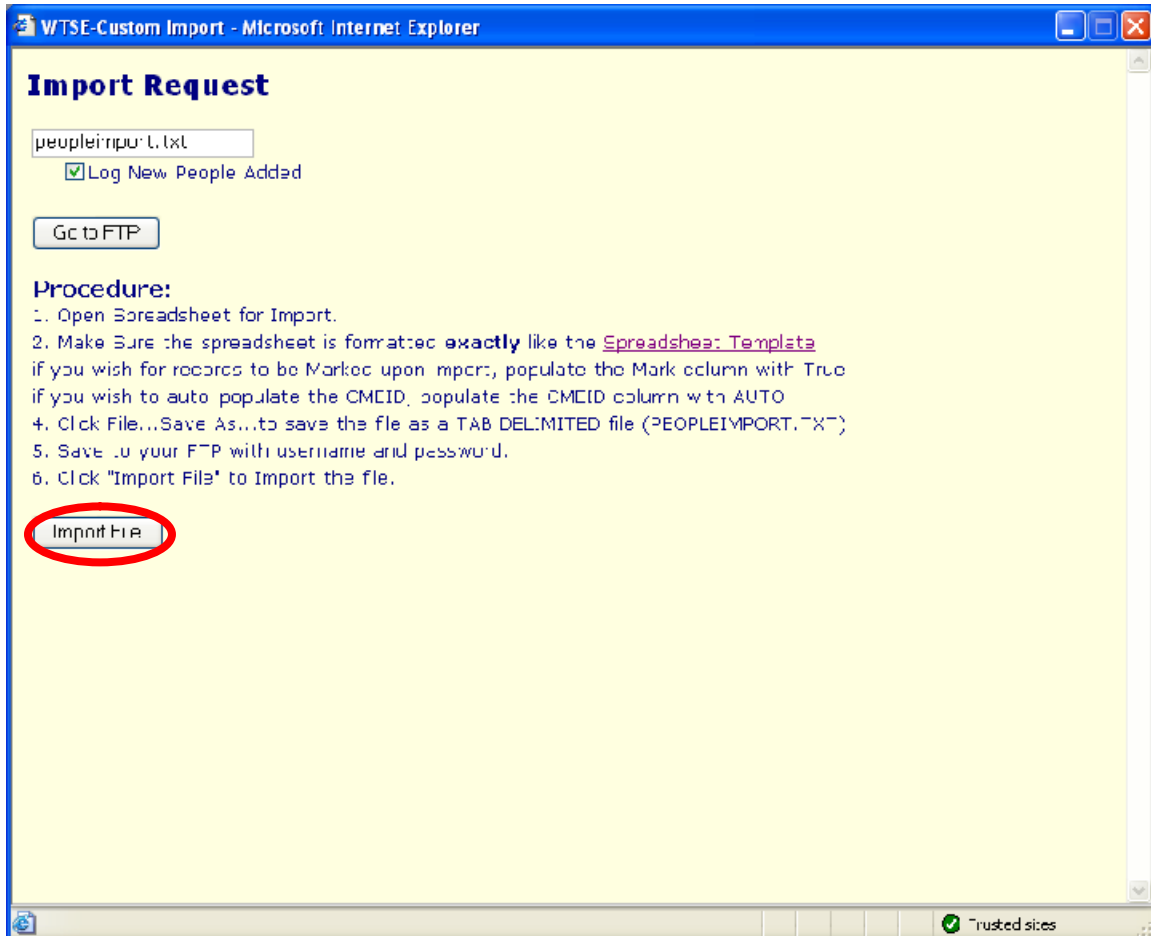


Fig. K

Result: You have successfully imported People into your **WEB Tracker Staff Edition**. If you checked the box next to "Log New People Added", they will be Marked in your People Listing.