TRaCIO CSV Uploading: How to

The following outlines guidelines for the required format and fields of CSV document for importing users into TRaCIO. Each field is mapped out below along with acceptable formats for those fields.

Creating a CSV Document

CSV (Comma-separated value) files are generally created within Microsoft Excel or a similar alternative (e.g. Open Office, Google Drive/Docs) but can be created with a simple text editor. However, the great advantage with using a spreadsheet application is that it allows the data to be viewed in a much more structured way and therefore, your CSV is more likely to be correctly formatted for import.

The required fields for each user are displayed below:

loginid   fname   sname   email   dob   ethnicityid   gender   ageid   centreid

Each of these fields will be covered in detail below.

Please note: users imported using the CSV import will be given the default password of *hello123*. Please recommend that users change this upon their first entry to the TRaCIO system.

Using a Spreadsheet

A typical view of a users list in a spreadsheet looks like this:

◇	A	B	C	D	E	F	G	H	I	J
1	loginid	fname	sname	email	dob	ethnicityid	gender	ageid	centreid	
2	jimlad	Jim	Lad	jimlad@gmail.com	17/01/1977	7	m	3	20	
3	alannah	Alannah	Smith		25/12/1985	1	f	1	0	
4										
5										

It is important to note that the fieldnames are required in row 1 of the CSV file.

To save a document in CSV format from Microsoft Excel or a spreadsheet, select File > Save as and select Comma Separated Values (CSV) from the format drop-down. This will then produce a CSV text file suitable for import into TRaCIO.

Using a Text Editor (e.g. Notepad, Wordpad, TextEdit for Mac)

The above data displayed in MS Excel will appear like this within a text editor:

```
1    loginid,fname,sname,email,dob,ethnicityid,gender,ageid,centreid
2    jimlad,Jim,Lad,jimlad@gmail.com,17/01/1977,7,m,3,20
3    alannah,Alannah,Smith,,25/12/1985,1,f,1,0
```

Straight away it is easy to see that the fields are not as easy to identify because blank or short text values tend to shorten the length of the text and make it harder to map to the fieldnames (as shown on line number 1).

File Requirements

File Format and Extension

The uploaded file must be of text/csv mime type and must have the file extension .csv. Please ensure your file is a csv text document and not a renamed .xls/.xlsx (Excel) file. To save a .csv from Excel use the File > Save As option and selecting 'Comma Separated Values (CSV)' from the format drop-down.

Maximum Filesize

350kb has been set as the maximum filesize. This is considerably more than a typical CSV file size and should therefore suit all providers.

Field Requirements

Each column/field is detailed below along with whether they are required and the format requirements.

loginid

This is the users username for the TRaCIO system.

Required: Yes.

Format: Please use only alphabetical, numeric and underscore characters only.Length between 6 and 20 characters.

fname (Firstname) and sname (Surname)

These fields represent the users name.

Required: Yes

Format: Only letters, apostrophes (\') and hyphens (-) allowed.

email

Email address of the user.

Required: No. Leave blank if not required.

Format: Use an acceptable email format.

dob (Date of Birth)

The user's date of birth.

Required: Yes.

Format: Set to uk date format (dd/mm/yyyy). Please use slashes as divider characters.

ethnicityid (Ethnicity Code)

The ethnic origin of the user.

Required: Yes.

Format: Number of code (as shown in ethnicityid column below).

ethnicityid	Ethnicity
1	White: British
2	White: Irish
3	White: Other
4	Mixed: White/Black Caribbean
5	Mixed: White/Black African
6	Mixed: White/Asian
7	Mixed: Other
8	Black or Black British: Caribbean
9	Black or Black British: African
10	Black or Black British: Other
11	Asian or Asian British: Indian
12	Asian or Asian British: Pakistani
13	Asian or Asian British: Bangladeshi
14	Asian or Asian British: Other
15	Chinese or Other Ethnic group: Chinese
16	Chinese or Other Ethnic group: Chinese or Other Ethnic group Any

gender

The user's gender.

Required: Yes.

Format: Set to 'm' (Male) or 'f' (Female).
ageid

The age of the user as defined by a coded range.

Required: Yes

Format: Number of code (as shown under 'ageid' column below)

ageid	Age Range
1	16-18
2	19-24
3	25+

CentreID

This represents the code of the users center. This might be a campus, building or geographical location within the provider's institution. If centres haven't been preset by the provider administrator, these can be done on the 'Provider Admin' screen within TRaCIO.

If they have been set, you will see a list of centres on the CSV Import screen, e.g.

centreid	Name
20	Tycoch
25	Llwyn-y-Bryn

Please note: if a centre is visible elsewhere (such as reporting screens), but it is not available on the above table of your CSV screen, the centre has been remove from the live system and has, to all intents and purposes, been archived.

Required: No. Enter 0 or leave blank if not required. Users will then be prompted to select a centre upon login.

Format: Number (as shown in the CentreID column above).