



The Education Booking System
ROOMS, RESOURCES, LETTINGS

User Import

After downloading your User Template, it should open natively in a spreadsheet program such as Microsoft Excel, or OpenOffice. Should it open in a text editor instead (Notepad, Wordpad etc), please check if you require a spreadsheet program to be installed on your computer or if the file association needs to be adjusted (the file type is csv).

Tip: It is possible to complete the template using a text editor, but it will be very time-consuming and also make it very difficult to spot any keying errors.

When opening the template, it will be pre-populated with details of all your existing users. If you are a new site, the likelihood is that only the default 'admin' account is included.

Each row represents a single user, whilst columns A to K are the settings for that user.

Tip: The columns do not auto-expand to fit the text. Therefore, you may need to manually adjust their widths to see everything clearly.

The import process consists of eleven core settings. Details of each setting are covered fully starting on the next page of this document.

The key point to note is that the first column (REF) must not be changed. You can amend any other setting for an existing user but the number listed in column A must stay exactly the same. When adding a new user, leave this entry blank.

Please also note that the Booking System also includes several optional settings that are not covered by this import. Therefore, once the import is complete, you may need to return to the main User page and make any final adjustments.

To add the details for a new user, start on the line immediately below the final existing one. Hopefully, this is already apparent, but this import is for users who can login to SchoolBooking and access the various modules... If you are a lettings site, hirer details should not be included here.

After completing your template, save it, and then proceed to Stage Three of the Import Process.

Column A - Ref

Important: This field must not be changed

It is this entry that notifies the import process if this is a new user or an amendment to an existing one.

If blank, a new user account will be created.

If populated, the existing account with that database ID will be amended.

Please do not enter or change anything in this column as this will cause serious issues with your existing data records.

Column B - Title

Valid entries = Mr/Mrs/Miss/Ms/Dr/Rev/Sir

This entry is optional and is generally only required if you will be using a formal naming system in your booking records (e.g. Mr J Smith, rather than John Smith).

Columns C/D - Forename & Surname

In general, any entry can be recorded here, however, please note....

If the import picks up two identical forename/surnames, one of the entries will have the number 2 automatically added to the end of the surname.

Although the forename can be left blank, the surname cannot, therefore, if the user account is for a department rather than an individual (e.g. ICT), it is the surname that should be populated.

Tip: Although possible, shared accounts are not recommended. An account can only be used by one person at a time.

Certain non-numeric/alphabetical characters may be automatically removed during the import (example: commas and speech marks).

Column E - Username

This entry is required for the user to be able to login to SchoolBooking.

Important: SchoolBooking enables ldap logins where the username/password is controlled by your site network.

Therefore, if there is even a slight possibility that you will require this feature one day, the username recorded here must be an exact match with the username recorded on your site's network.

Column F - Email Address

This entry can be for any valid email address and is used for notification purposes (e.g. new bookings, cancellation etc).

At present, it is not possible for two separate accounts to share an identical email address. If duplicates are found, the later email entry will be removed.

If this is a factor, please use an alias address for one of those accounts (example: if your email address is john.smith@myschool.com, in most cases an alias of jsmith@myschool.com can be set to deliver emails to the same email account.

Note: Email address will be used for SchoolBooking purposes only. They will not be passed on to any third parties.

Column G - Bookings

This entry determines if this particular user has access to the Bookings area of the system. There are two possible settings...

1 = Standard Level User

2 = Bookings Manager

A blank entry will be treated as No Access.

Column H - Lettings

This entry determines if this particular user has access to the Lettings area of the system. This should be a 1 for Yes or leave blank for No.

Note: The Lettings area covers only the day to day running of Lettings (e.g. record a letting, manage payments etc). The actual setup of the system is an Admin task.

Column I - Events

This entry determines if this particular user has access to the Events area of the system. This should be a 1 for Standard User, 2 for Events Manager, or leave blank for No.

Column J - Reports

This entry determines if this particular user has access to the Reports area of the system. This should be a 1 for Yes or leave blank for No.

Although this can be set for any user, usually only managers/admins should have access to these reports. The more general reports such as the list of bookings are already included in the Bookings and Lettings areas.

Column K - Admin

This entry determines if this particular user has access to the Administration area of the system. This should be a 1 for Yes or leave blank for No.

Note: If set to Yes, the Bookings, Lettings, Events, and Reports entries are irrelevant. Admins automatically have full access to those areas.

Tip: Avoid creating too many admins for your site. Generally, only one person at a time should ever be updating things in this area.