

DATA IMPORTS



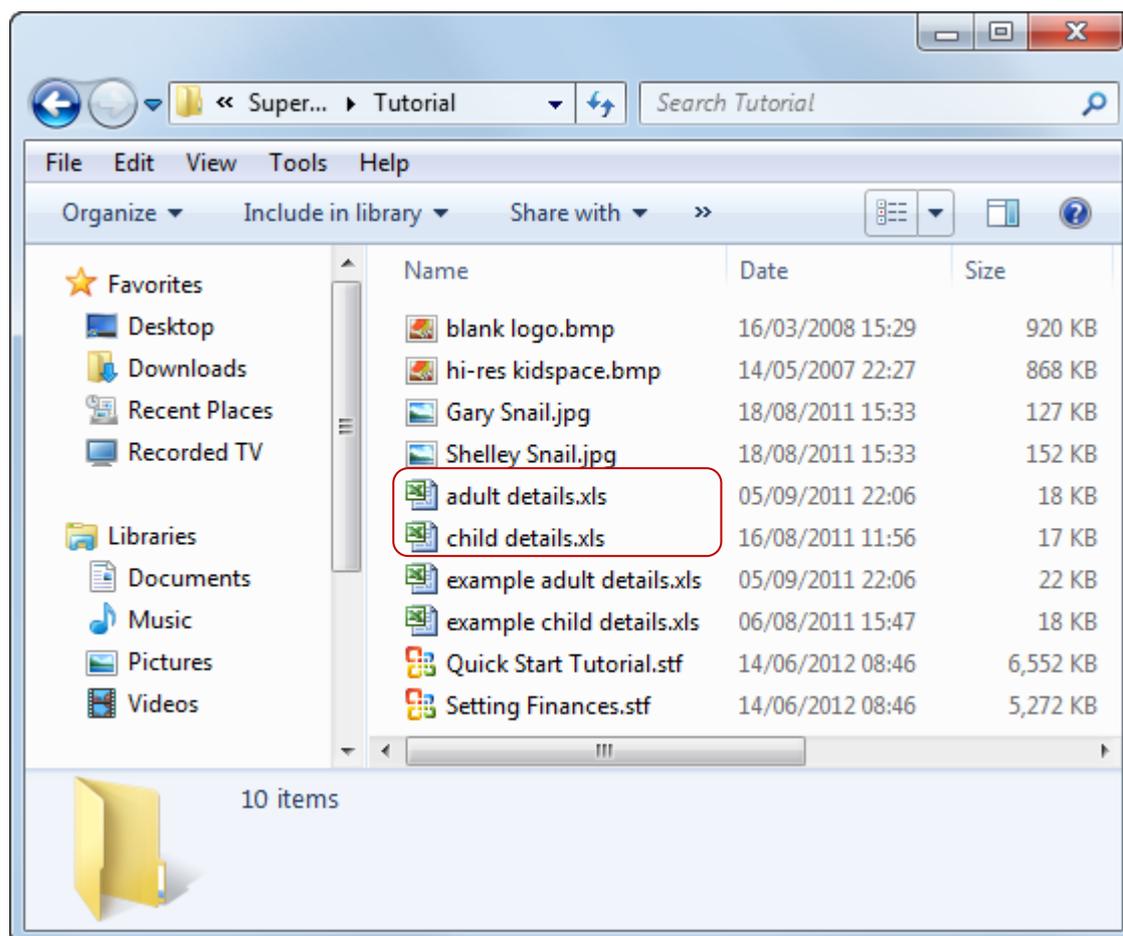
Less Typing!

Manually entering all of the family details can be a big job the first time that you use SuperFox. You can avoid most of the typing needed to enter your families.

The Blank Adult & Child Spreadsheets

Browse to the following folder on your computer where you can find the blank child and adult spreadsheets:

C:\Program Files\Helios\SuperFox\Tutorial [or 'Program Files (x86)' for 64 bit computers]



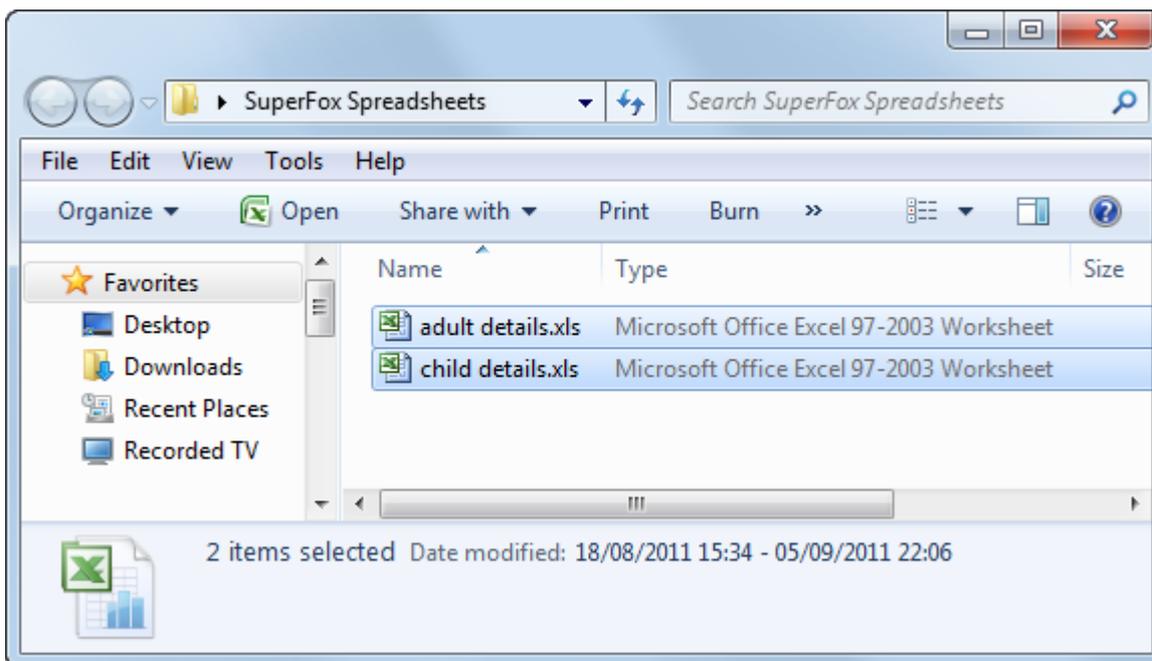
Find the two spreadsheets: **child details.xls** and **adult details.xls**

Copy The Spreadsheets

Make a copy of the two spreadsheets and paste the copies into a convenient folder that you can find again easily.

We are not going to use the original spreadsheets as we may wish to use them again in the future. (If for some reason you do lose the original spreadsheets you can download copies from the SuperFox website.)

- Right click on each spreadsheet and choose the copy option on the pop-up menu.
- Browse to your chosen working folder, right click and choose the paste option from the pop-up menu.
- You can rename the spreadsheets if you find it useful to identify the contents. (e.g. adults 2013.xls)



Start With A Backup

Make a backup before importing any data. It is much easier to restore a backup than to delete all of the imported records if a mistake is made (for example importing the data twice by accident.)

How It Works

We can import child and adult details into SuperFox. We still need to assemble the adults and children into families using the usual procedure, but there is very little typing involved and this saves a lot of time. The procedure is the same for adults and children's details:

1. **Copy your child or adult details into the appropriate spreadsheet.**
2. **Check the spreadsheet carefully.**
3. **Save the spreadsheet as a CSV file and close the spreadsheet.**
4. **Import the details into SuperFox and edit as required.**
5. **Assemble the new families in the usual way.**

The biggest time is usually found from importing adult details. Adults usually outnumber the children and they have addresses and phone numbers too!

Importing Children's Details



1. Complete The Child Details Spreadsheet

Open the **child details.xls** spreadsheet. Copy your child details into the spreadsheet. It is important to use the correct columns and to use the formats as shown below:

	A	B	C	D	E	F
1	Child First Name	Child Mid Name	Child Last Name	Date of Birth as dd/mm/yyyy	M/F	Town of Birth
2						
3						

- Child First Name** Child's preferred first name – this must be supplied
- Child Mid Name** Child's preferred middle name – leave blank if not applicable
- Child Last Name** Child's preferred last name – this must be supplied
- Date of Birth as dd/mm/yyyy** Child's date of birth as dd/mm/yyyy – this must be supplied
- M/F** Child's gender as capital M or F – this must be supplied.
- Town of Birth** Child's town of birth – leave blank if not known

*** IMPORTANT *** Do not edit or delete the column titles as they are needed by SuperFox for the import.

You do not need to type this information into this spreadsheet, you can simply copy and paste it from your own spreadsheet records. A completed child spreadsheet would look like this:

	A	B	C	D	E	F
1	Child First Name	Child Mid Name	Child Last Name	Date of Birth as dd/mm/yyyy	M/F	Town of Birth
2	John	Rory	Dory	19/11/2004	M	Anywick
3	Jack	Mack	Yak	12/08/2003	M	Anytown
4	Pippa		Penguin	05/02/2005	F	Anytown
5	Petra		Penguin	30/01/2003	F	Anytown
6						

Check the columns and their formats very carefully.

2. Save As CSV File

When you are happy that the columns and titles are all correct save your work by choosing 'Save As' from your spreadsheet's menu.

Choose the file type to save as: CSV (Comma delimited) (*.csv)

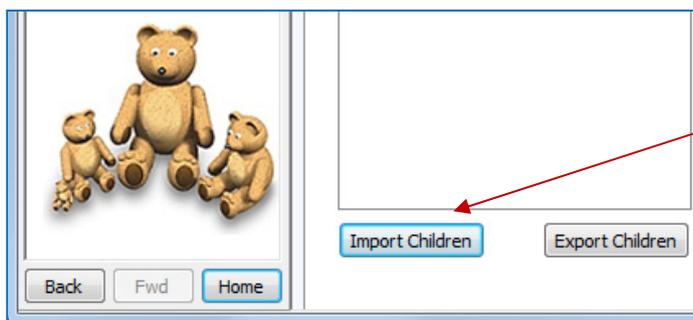
File name:	child details.csv	▼
Save as type:	CSV (Comma delimited) (*.csv)	▼

3. Now close the spreadsheet

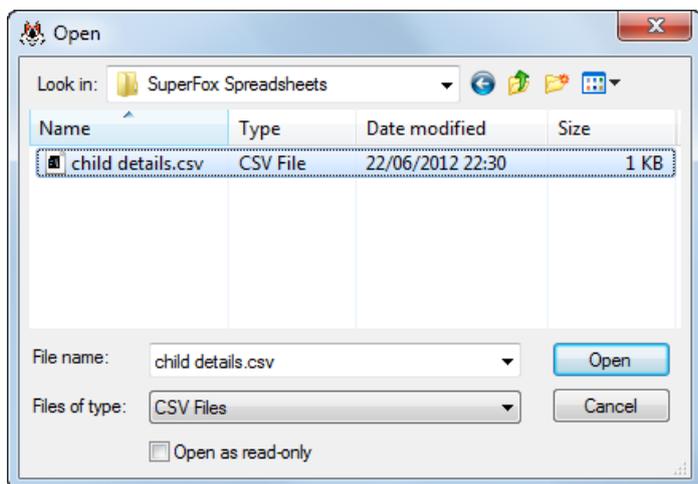
It is surprisingly easy to forget to close the spreadsheet. If the csv file is left open in the spreadsheet the import into SuperFox will fail.

4. Import the CSV file

The child details are imported from the child details form: **Go > Home > Family Details > Children >**



Click on the **Import Children** button at the bottom of the Children list.



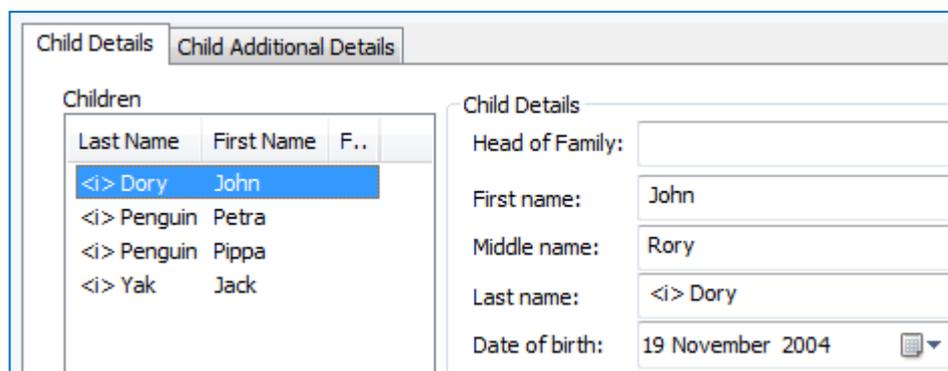
The open form will pop-up. Browse for your newly created CSV file.

Click on the CSV file and click on the 'Open' button

The imported children will now appear in the Children column.

The imported children have their surnames prefixed with < i > which makes them easy to spot.

Check and complete their details and when they are correct delete the prefix from their surnames.



Tip! If the import fails check that the CSV file is not open in a spreadsheet and if not, check the column titles and the children's details columns.

Importing Adult Details



1. Complete The Adult Details Spreadsheet

Open the **adult details.xls** spreadsheet. Copy your adult details into the spreadsheet. It is important to use the correct columns and to use the formats as shown below:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Adult Title	Adult First Name	Adult Last Name	Phone (Day)	Phone (Night)	Phone (Mobile)	Email	Address Line 1	Address Line 2	Town	County	Postcode
2												
3												

- Adult Title** Adult's address title, Mr, Mrs, etc.
- Adult First Name** Adult's first name – this must be supplied.
- Adult Last Name** Adult's last name – this must be supplied.
- Phone (Day)** Adults day time phone number – leave blank if not available
- Phone (Mobile)** Adults mobile phone number – leave blank if not available
- Phone (Night)** Adults night time phone number – leave blank if not available
- Email** Adults e-mail address – leave blank if not available
- Address Line 1** First line of adults postal address – leave blank if not available
- Address Line 2** second line of adults postal address – leave blank if not available
- Town** Third line of adults postal address – leave blank if not available
- County** Fourth line of adults postal address – leave blank if not available
- Postcode** Postcode for adults postal address – leave blank if not available, the post code must go in this column if available.

*** IMPORTANT *** Do not edit or delete the column titles as they are needed by SuperFox for the import.

You do not need to type this information into this spreadsheet, you can simply copy and paste it from your own spreadsheet records.

Check the columns and their formats very carefully. A completed adult spreadsheet looks quite full!

	A	B	C	D	E	F	G	H	I	J	K	L
1	Adult Title	Adult First Name	Adult Last Name	Phone (Day)	Phone (Night)	Phone (Mobile)	Email	Address Line 1	Address Line 2	Town	County	Postcode
2	Mrs	Yolanda	Yak	01330 123 4567	01230 456 7890	07777 111222	yaks@superfox.org.uk	11 Green Fields	Fartown	Anytown	Northumberland	AA1 9ZZ
3	Mr	Uri	Yak	05550 333 4444	01230 456 7890	07777 222333	yaks@superfox.org.uk	22 Grassy Grove	Fartown	Anytown	Northumberland	AA1 9ZZ
4	Mrs	Dora	Dorey	01110 222 3333	01230 666 8888	07777 555666	dories@superfox.org.uk	25 Ocean Drive	West Beach	Anywick	Northumberland	AA1 9ZZ
5	Mr	Don	Dorey	01230 666 8888	01230 666 8888		dories@superfox.org.uk	25 Ocean Drive	West Beach	Anywick	Northumberland	AA1 9ZZ
6	Mr	Peter	Penguin	02220 444 5555	01230 789 1234	07777 888999	gentoos@superfox.org.uk	44 Rocky Road	Foxholes	Anytown	Northumberland	AA1 9ZZ
7	Mrs	Paula	Penguin	04440 888 9999	01230 789 1234	07777 999000	gentoos@superfox.org.uk	44 Rocky Road	Foxholes	Anytown	Northumberland	AA1 9ZZ
8												

2. Save As CSV File

When you are happy that the columns and titles are all correct save your work by choosing 'Save As' from your spreadsheet's menu.

Choose the file type to save as: CSV (Comma delimited) (*.csv)

File name:

Save as type:

3. Now close the spreadsheet

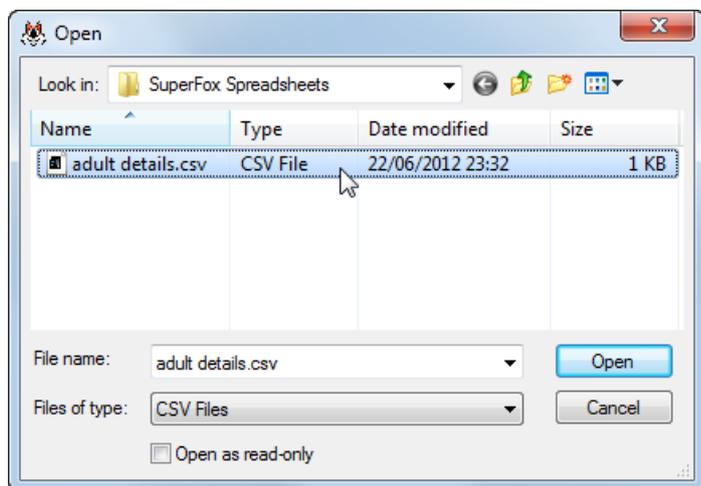
It is surprisingly easy to forget to close the spreadsheet. If the csv file is left open in the spreadsheet the import into SuperFox will fail.

4. Import the CSV file

The adult details are imported from the adult details form: **Go > Home > Family Details > Adult >**



Click on the **Import Adults** button at the bottom of the Adults list.



The open form will pop-up. Browse for your newly created CSV file.

Click on the CSV file and click on the 'Open' button

The imported adults will now appear in the Adults column.

The imported adults have their surnames prefixed with < i > which makes them easy to spot.

Check and complete their details and when they are correct delete the prefix from their surnames.

Adults			Adult Details	
Last Name	First Name	Title	Title:	Mr
<> Dorey	Don	Mr	First name:	Don
<> Dorey	Dora	Mrs	Last name:	<i> Dorey
<> Penguin	Paula	Mrs	Phone (day):	01230 666 8888
<> Penguin	Peter	Mr	Phone (night):	01230 666 8888
<> Yak	Uri	Mr	Phone (mobile):	
<> Yak	Yolanda	Mrs	Email address:	dories@superfox.org.uk

Tip! If the import fails check that the CSV file is not open in a spreadsheet and if not, check the column titles and the adult details columns.

End