



# PERSONNEL IMPORT QUICK REFERENCE GUIDE

Version 4.0

## 1 IMPORT CHECKLIST

To help ensure that the import process runs smoothly, make sure you can check off each of the items below:

- Does the organization you're importing to exist in SalamanderLive?
- Do all qualifications and training codes you're importing exist in SalamanderLive?
- Are the import file's column headings correct?
- Do you have the minimum requirements for all records (First Name, Last Name, and Organization name)?
- Did you include an ID? (If not, an ID will be auto-generated.)
- Did you delete empty columns?

## 2 FORMAT REQUIREMENTS

The compatible file for this import is .CSV or .CSV UTF-8. Column headers are specifically named (see the chart) and must be used for a successful import (they are not case-sensitive). The organization is matched by Name so if the import finds multiple matches, the record will be skipped. The person is matched by First Name, Last Name, and ID, however, if the import finds multiple matches, the record update will be skipped. If the import finds a match on ID and Organization name, but the First Name and Last Name are different, the record will be skipped with an "Internal Error" message.

The following columns are supported (required fields are marked with an asterisk (\*). If importing an address, the import will not support a partial address. The user will need to include the fields marked with 2 asterisks (\*\*).

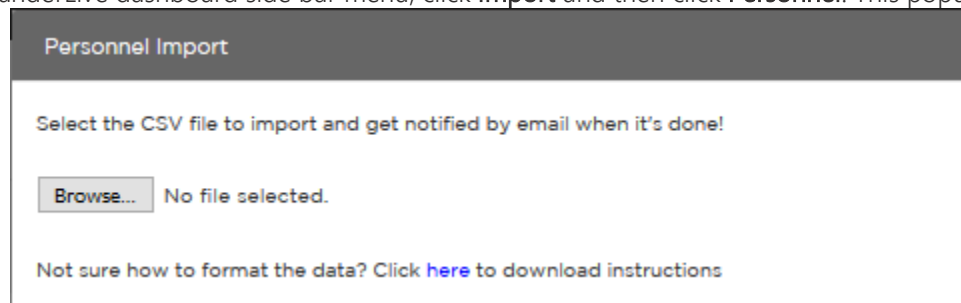
| COLUMN HEADER       | LENGTH<br>MAX | TYPE      | ACCEPTED<br>FORMATS/VALUES   | EXAMPLE                  | NOTES  |
|---------------------|---------------|-----------|--|--------------------------|--|
| *Organization Name  | 50            | Text      |  | Anywhere, USA            | The organization must exist in SalamanderLive or the record will not import.     |
| *ID                 | 15            | Text      |  | 37576112                 | Personnel ID must be a unique value to all people within the organization.       |
| Prefix              | 5             | Text      |  | Mr.                      |  |
| *First Name         | 25            | Text      |  | John                     |  |
| *Last Name          | 25            | Text      |  | Smith                    |  |
| Middle Initial      | 25            | Text      |  | L                        |  |
| Suffix              | 5             | Text      |  | Jr.                      |  |
| Status              |               | Pick List | Active, Cancelled, Denied, Expired, Full Time, Inactive, Laid Off, Leave, Life Member, Medical Leave, Other, Part Time, Pending Processing, Pending Surrender, Retired, Revoked, Surrendered, Temp, Terminated, Unknown, Voluntary | Active                   | If no status value is included in the CSV file, the import will assume "Active". |
| Birth Date          |               | Date      | MM/DD/YYYY, M/D/YY, YYYY-MM-DD   | 01/01/1980               |  |
| Station             | 50            | Text      |  | Fire Station 5           |  |
| Title               | 25            | Text      |  | Captain                  |  |
| Email Address       | 50            | Text      |  | jsmith@gmail.com         |  |
| Other ID            | 50            | Text      |  | Radio: 893343            |  |
| Student ID          | 15            | Text      |  | 2013667                  |  |
| Hire Date           |               | Date      | MM/DD/YYYY, M/D/YY, YYYY-MM-DD   | 01/01/1980               |  |
| Termination Date    |               | Date      | MM/DD/YYYY, M/D/YY, YYYY-MM-DD   | 1/1/80                   |  |
| Standard Rate       | 5             | Currency  | 999.99   | 25.00                    |  |
| Standby Rate        | 5             | Currency  | 999.99   | 25.00                    |  |
| Overtime Rate       | 5             | Currency  | 999.99   | 25.00                    |  |
| Other Rate          | 5             | Currency  | 999.99   | 25.00                    |  |
| Drivers License     | 30            | Text      |  | MI423424535646S          |  |
| License Expiration  |               | Date      | MM/DD/YYYY, M/D/YY, YYYY-MM-DD   | 1980-01-01               |  |
| License State       | 2             | Text      |  | MI                       |  |
| Note                | 512           | Text      |  | Note                     |  |
| Home Phone          | 10            | Number    | 999-999-9999, 9999999999   | 800-888-8888, 8008888888 |  |
| Mobile Phone        | 10            | Number    | 999-999-9999, 9999999999   | 800-888-8888, 8008888888 |  |
| Fax Phone           | 10            | Number    | 999-999-9999, 9999999999   | 800-888-8888, 8008888888 |  |
| Work Phone          | 10            | Number    | 999-999-9999, 9999999999   | 800-888-8888, 8008888888 |  |
| TAG Issue Date      |               | Date      | MM/DD/YYYY, M/D/YY, YYYY-MM-DD   | 01/01/1980               |  |
| TAG Expiration Date |               | Date      | MM/DD/YYYY, M/D/YY, YYYY-MM-DD   | 01/01/1980               |  |

| Address Type              |     | Pick List   | Home, Mailing, Other,<br>Work, Physical   | Home                                     | If no address type value is included in the CSV file, the import will assume "Home".  |
|---------------------------|-----|-------------|---|--|---|
| Address Line 1**          | 150 | Text        |   | 122 W. State St.                         |   |
| Address Line 2            | 30  | Text        |   | Apt. #201                                |   |
| City**                    | 30  | Text        |   | Traverse City                            |   |
| Country                   | 2   | Text        |   | US                                       |   |
| State**                   | 2   | Text        |   | MI                                       |   |
| Postal Code**             | 10  | Number      |   | 49684                                    |   |
| County                    | 50  | Text        |   | Grand Traverse                           |   |
| Gender                    |     | Pick List   | Female, Male  | Male                                     | If the CSV file contains F, Female, W or woman, the import will assume "Female". If the CSV file contains M, Male or man, the import will assume "Male".  |
| Height                    | 5   | Number      | X'XX"   | 5'10"                                    | No space should be included in the format. If the height is a single digit (i.e. 4, 5, 6), the import will assume the value is feet and zero inches (ex. 5'0"). If height is a double digit with no single or double quotes (i.e. 55, 62, 73), the import will assume inches (ex. 73 inches). |
| Weight                    | 5   | Number      | 99999   | 198                                      |   |
| Organ Donor               | 1   | Text        | Y or N  | Y  |   |
| Hair Color                |     | Pick List   | Bald, Black, Blonde, Blue, Brown, Green, Grey, Pink, Purple, Red/Auburn, Sandy, White | Blond                                    |   |
| Eye Color                 |     | Pick List   | Black, Blue, Brown, Grey, Green, Hazel, Maroon, Pink, Dichromatic                     | Blue                                     |   |
| Blood Type                |     | Pick List   | A, A+, AB-, AB+, B-, B+, O-, O+   | O+                                       |   |
| Blood Pressure            | 7   | Number      | 999/999   | 120/80                                   |   |
| Resting Pulse             | 3   | Number      | 999   | 70                                       |   |
| Respirations              | 2   | Number      |   | 16                                       |   |
| Physician Name            | 50  | Text        |   | Dr. William Jones                        |   |
| Physician Phone           | 10  | Number      | 999-999-9999, 9999999999  | 800-888-8888, 8008888888                 |   |
| Insurance Company         | 35  | Text        |   | State Farm                               |   |
| Policy #                  | 25  | Text/Number |   | 123-4567-F89-01A                         |   |
| Religion                  | 25  | Text        |   | Catholic                                 |   |
| Emergency Contact 1 Name  | 35  | Text        |   | Jane Smith                               |   |
| Emergency Contact 1 Phone | 10  | Number      |   | (800) 888-8888, 888-888-8888, 8008888888 |   |
| Emergency Contact 2 Name  | 35  | Text        |   | Bill Smith                               |   |

|                           |    |             |  |
|---------------------------|----|-------------|--|
| Emergency Contact 2 Phone | 10 | Number      | (800) 888-8888,<br>888-888-8888,<br>8008888888 |
| Allergy 1                 | 25 | Text        | Bees   |
| Allergy 2                 | 25 | Text        | Environmental                                  |
| Medication 1              | 25 | Text        | Aspirin  |
| Medication 2              | 25 | Text        | Albuterol                                      |
| Qualification Code 1      | 10 | Text/Number | CPR  |
| Qualification Code 2      | 10 | Text/Number | FFI  |
| Qualification Code 3      | 10 | Text/Number | HMTECH   |
| Qualification Code 4      | 10 | Text/Number | HMT  |
| Qualification Code 5      | 10 | Text/Number | CPR  |

### 3 IMPORT INSTRUCTIONS

- From the SalamanderLive dashboard side bar menu, click **Import** and then click **Personnel**. This popup will appear:



- Click **Browse** to find the import file and select it for import.
- Click the **Upload File** button. The message will state, "Upload Complete. You will receive an email within 15 minutes with the results".
- Click the **Done** button to exit and close the Personnel Import window.
- Check email. One of two emails will appear, starting with the subject, "Import complete" or "Import failed".

- The "Import complete" email will look similar to the example below.

Your import of importtest.csv is complete.

Total records processed: 10  
 People added: 8  
 People updated: 0

**Errors (2)**

| Record Number | Description   |
|---------------|---|
| 2             | The value provided for field "Identity Code" is too long. |
| 7             | The organization named "notsure" was not found.           |

**Warnings (5)**

| Record Number | Description   |
|---------------|---|
| 4             | The value provided for field "Last Name" was too long and has been truncated.           |
| 6             | The value provided for field "First Name" was too long and has been truncated.          |
| 6             | The value provided for field "Rank" was too long and has been truncated.                |
| 7             | The value provided for field "Mobile Phone Number" was too long and has been truncated. |
| 8             | The value provided for field "Email" was too long and has been truncated.               |

- When critical data is incorrect (such as when the ID data is too long or the organization can't be found), an error will appear in the email describing the error. The record will not import.
  - When the data is too long for the field or when the data is invalid for a field (i.e. no digits in the telephone field), a warning will appear in the email describing the issue. The record will import but the field in question will be either truncated or empty.
- The "Import failed" email will look similar to the example below. A failed import mainly occurs when the header information is incorrect or missing.

Your import of "importtest.csv" has failed.

**Errors (1)**

| Record Number | Description  |
|---------------|--|
| header        | The required field Last Name is missing from the header. |

- Records are created or updated using the ID field as the unique identifier. If the ID is not found within the account for the user performing the import, a new record is created. If the ID is found within the account, the existing record with that ID is updated. All fields, including the organization, can be updated.

## 4 CONTACT US

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