M170007 Quick Manual

Editing group registrations with MS Excel

September 2017

General

This functionality makes it possible to "import" group registrations based on a pre-formatted Excel sheet.

Enable the Excel's copy paste function

The registration type determines if the Excel's copy paste function is enabled in a registration or not. The registration types are defined in the Administrator's Table RG-types.
To enable the Excel's copy paste function you have to set PasteCopyExcel (**1**) to True and CopyPasteMode (**2**) to 0 for the extended import of the participants and to 1 for the reduced import.

Edit Group registrations with Excel

If you select a registration type (**1**) for which the Excel's copy paste function is activated, it is possible to copy or save (**2**) a selection of participants in an Excel file.

In Excel the participant data can be modified, after which the modified data can be copied or loaded from an Excel file and pasted or saved back (**3**) in cmOffice.

Registration data in the Excel file

Data that can be modified:

- Participant number
- Relation data of participant and/or institute
    If it's a reduced import, only the fields with an * are copied to Excel!
    - Title*
    - First name**
    - Last name**
    - Professional address yes/no?
    - Institute name 1*
    - Institute name 2
    - Department
    - Street 1
    - Street 2
    - City
    - Zip code
    - Country code*
    - Phone number
    - Fax number
    - E-mail address*
    - Mobile number
    - URL
- The quantity of the registration Extra's
- The names of the accompanying persons
- MemberID
- Remarks

<u>Data that cannot be modified:</u>

Following data will be copied as well, but may not be modified:

- Registration rate
- Registration rate description
- Record number participant

Add Hotel reservations to the Excel file

To enable the management of Hotel reservations trough the Excel file you have to define in the Administrator in the *Lists table a record with Listnr = 202 and Code = Conference code.

Add Profiles to the Excel files

To enable the management of Profiles trough the Excel file you have to define in the Administrator in the *Lists table a record with Listnr = 201, Code = Conference code, IntegerValue = Number of profiles to add and TextValue = aaa;bbb;ccc whereby aaa, bbb and ccc are the codes of the requested level 1 profiles.

Copy or save participant data from cmOffice in an Excel file

Copy options

If you select the copy button, you can choose one of three options.
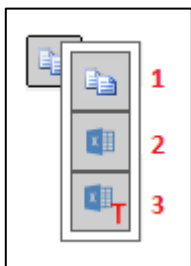
Copy participant data from cmOffice to the clipboard

Open the group registration and select the participant records you wish to edit in Excel.
Select the copy button (**1**).
Create a new Excel file or open an existing one and paste the data.

	A	B	C	D	E	F
1	Registration no.	PRG-2865				
2	Group responsible	Testperson1 BE, A.				
3	Address	Mr. Adam Testperson1 BE				
4		Developer				
5		Test company BE Second name				
6		Lil 26				
7		Block A				
8		BE-2440 Geel				
9						
10	.					
11						
12						
13	Conference	PRG2006	Prague 2006			
14	No.	Title	FirstName	LastName	Professional address? (yes/no)	Institute1
15	PRG-2865-001	Mr.	Adam	Testperson1 BE	yes	Test company BE
16	PRG-2865-002			Testperson1 BE, Adam-002	no	
17						

Save participant data in a new Excel file

Open the group registration and select the participant records you wish to edit in Excel.
Select the save button (**2**).
A new Excel file will be created and the data will be saved in the first sheet. A file dialog will be opened in which you can enter the name and select the destination for this Excel file.

Save participant data in a copy of a prepared Excel file

Open the group registration and select the participant records you wish to edit in Excel.
Select the save in template button (**3**).
We can't use real Excel template files (.xltx) but will simulate it.
A file dialog will be opened in which you can select an existing Excel file (.xlsx). This file can be formatted and already contain some text like a little user manual or predefined drop down lists etc. A copy of this Excel file will be created and **the data will be saved in the first sheet**. Make sure that the static text in the source file doesn't use the cells reserved for cmOffice! This file will be saved on the same location as the source file and will have the same name followed by a sequence number.

Basic Registration data in the Excel file

On top of the participant data some additional info is shown.
The participant data always starts on row 13 with the conference!
All the registration extra's defined for the current conference and marked as "Show on web" will be available. You can delete the columns with extras that you don't want to be managed by the customer.
If there's at least one registration for an accompanying person, an additional column "Names accompanying persons" will be available after the registration extra's columns. You can enter multiple persons in one cell.

Accompanying person	Extra	Names accompanying persons to be registered. (Name;Firstname;Title;...)	MemberID
3	0	Vanoppen;Luc;Mr. Sleebus;Tim;Mr. Geens;Tom;Mr.	E-06-01180
0	0		
0	0		

You can add additional rows to add participants to the registration. **Make sure the "RN_RegFor" cell at the end is empty!**

You can delete participant rows but this won't influence the registration if you paste the participant data back to cmOffice.

It's not allowed to change or delete the first two rows (Conference, column titles) of the participant data (the grey part).

If it's a reduced import, only part of the relation fields will be copied to Excel (see part 3.1)!

Hotel reservations in the Excel file

The copied hotel reservation fields are:

Hotels   : Hotel code/Hotel name/Room type
       Hotel code = code in the hotel definition
       Hotel name = name in the hotel name
       Room type = hotel_room_type_description in the table H-Hotel roomtypes in the
             Administrator

Arrival date   :
Departure date :
#Occupants   : has to be at least 1
Guest names   : the names of additional guests. The names of multiple guests need to be separated by a
       ";" . If #Occupants is > 1 and Guest names is empty the names Guest 1; Guest 2 will be
       used.
Diet requests   :
Special requests :
RN_HotelRes   : The Hotel reservation ID if it's an existing reservation.

The hotel reservations are inserted in the Excel file after the Extra's fields. If there are multiple hotel reservations in cmOffice for a participant, only the first one will be copied to Excel. Cancelled hotel reservations will not be copied.
The customers that will be completing the Group registration in Excel, don't know the hotel codes, names and room types. Therefor it's necessary to control the input with the use of Data validation with lists in Excel. This can also be used for the other fields.
Existing hotel reservations can be modified.

Profiles in the Excel file

The copied profile fields for each profile level 1 defined in *Lists are:
Profile level 2   : prof_L2_desc_E in the table R-Level 2 profile in the Administrator (see 3.3)

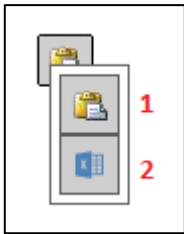The profiles are inserted at the end in the Excel file.

In the reduced import mode no profiles can be managed (see chapter 5.2).

Paste or load the participant data back into cmOffice

Paste options

After checking or modifying the data in Excel, you can copy-paste or load it back in cmOffice.
If you select the paste button, you can choose one of two options.

Paste the participant data from the clipboard in cmOffice

Select the paste button (**1**).

Important!

Before pasting, you should select the correct range of cells / data. This should be all delegate info, starting from row 13 which contains the cell with the word "Conference" in it. The cell after this one contains the conference code which is used as a control.

The participant data will be copied from the clipboard and saved or updated in cmOffice.

Load the participant data from an Excel file in cmOffice

Select the load button (**2**).

A file dialog will be opened in which you can select the Excel file that contains the participant data. This data needs to be saved in the first sheet!

Extended import of participants

It is not necessary that the participant is created as a record in the Relation Manager.

After pasting into cmOffice, the system checks if the relation (address) data has been changed or not.

If so or if the relation is not registered in the Relation Manager, a dialog box will pop up.

If you wish to lookup the relation in the Relation manager, please select the Relation Manager button.
In the Relation Manager, you will get the same dialog box you get when processing batch relations or registrations. Here, you can modify an existing relation or create a new one.
If you select a relation link and return to the registration module, the data of the selected relation will be shown.
It is not necessary to register the participant relation in the Relation Manager. You can leave the name as it is or change it in this dialog box if needed.

If you select the accept button and the relation is created in the Relation Manager, this relation will be linked to the participant.
If it is not a registered relation, the title, name and first name will be used for the participant's title and name.
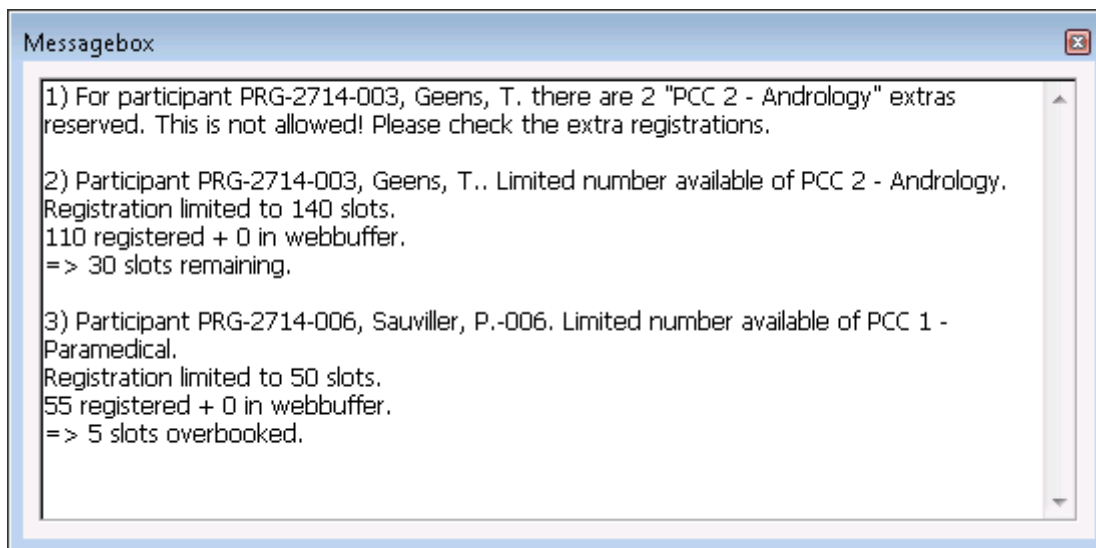
Reduced import of participants

In this mode the relation's data is immediately imported in the participant part. No relation dialog will be shown to save or modify the relation's data in the Relation manager.

In the reduced import mode no profiles can be managed.

Import error report

After processing all "pasted" participants, a message box appears with a summary of all issues or conflicts that may have occurred.

Messagebox

1) For participant PRG-2714-003, Geens, T. there are 2 "PCC 2 - Andrology" extras reserved. This is not allowed! Please check the extra registrations.

2) Participant PRG-2714-003, Geens, T.. Limited number available of PCC 2 - Andrology.
Registration limited to 140 slots.
110 registered + 0 in webbuffer.
=> 30 slots remaining.

3) Participant PRG-2714-006, Sauviller, P.-006. Limited number available of PCC 1 - Paramedical.
Registration limited to 50 slots.
55 registered + 0 in webbuffer.
=> 5 slots overbooked.

You can leave this window open while verifying and handling all remarks.

Possible alerts are:

- The column titles of the registration Extras have to be equal to the registration Extra's descriptions defined in cmOffice.
- The number of columns copied from Excel is invalid.
- The record ID of this participant is not unique.
- The record ID of this participant is not valid for this registration.
- The rate this participant is registered for is changed.
- The rate for this participant is not valid.
- The record of participant is locked and cannot be loaded.
- The registration number of this participant is not unique.
- The member ID of this participant belongs to another relation.
- The member ID of this participant is unknown.
- The participant is not a member but has a fee reduction.
- The participant is a member but has no fee reduction.
- The format of the accompanying persons of this participant is not valid.
- For this participant there are x number of this extra reserved. Only one reservation is allowed!
- The number of reservations for this extra is limited.