Upload Contacts

Overview

As an administrator in Electronic ICS (eICS), you can quickly add multiple contacts to a facility by uploading the contact data in an Excel® file. This bulk upload feature is especially helpful during the *Planning* phase, when you are setting up a new facility or need to add numerous contacts to an existing organization.

To help you with this process, a template has been created with specific fields, formatting and instructions. The template is accessed and downloaded from within eICS, and after adding your data to the template, you can quickly import and validate contacts.

> **Note**: The upload contacts template allows you to add new contacts to a facility. The template does not allow you to add contacts to multiple facilities, to domains, or to update existing contacts. We recommend you verify that contacts are not already in the system to prevent creating duplicates.

Upon successful upload and creation of contacts, eICS sends the standard *Welcome* email to the newly created contacts. For contacts with a username, the *Welcome* email contains a link that directs them to log into eICS, create a password, and update their profile with additional phone numbers or other contact details.

Administrators can also review and edit contacts, and if a username was not provided in the upload template, you can manually enable accounts for contacts that need access to eICS for planning, responding to, or recovering from incidents.

To Download the Template

1. On the *Home* page, point to the **Planning** menu and click **Contacts**.

2. In the **Contacts for** list, click the name of the facility.

3. On the upper right, click **Upload Contacts**. The *Upload Contacts* window opens.

4. Click Download Template. The template is downloaded through your browser and stored in your default downloads folder.
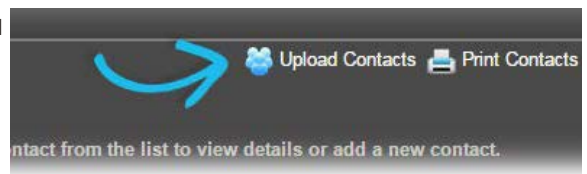
To Populate the Template

1. Open the template in Excel and add your contact data without changing the column names or the worksheet name.

   Tip: Included in the template is an Instructions worksheet that provides additional information about the file and this procedure.

2. When your contact data has been entered and is complete, save the file (with the existing name or a new one).

To Upload the Contact Data

1. On the *Planning: Contacts* page, on the *Upload Contacts* window, click **Browse**. Your browser's file navigation window opens.

2. Navigate to and select the contact data file, then click **Open**. The name of the file appears in the **Spreadsheet** field of the *Upload Contacts* window.
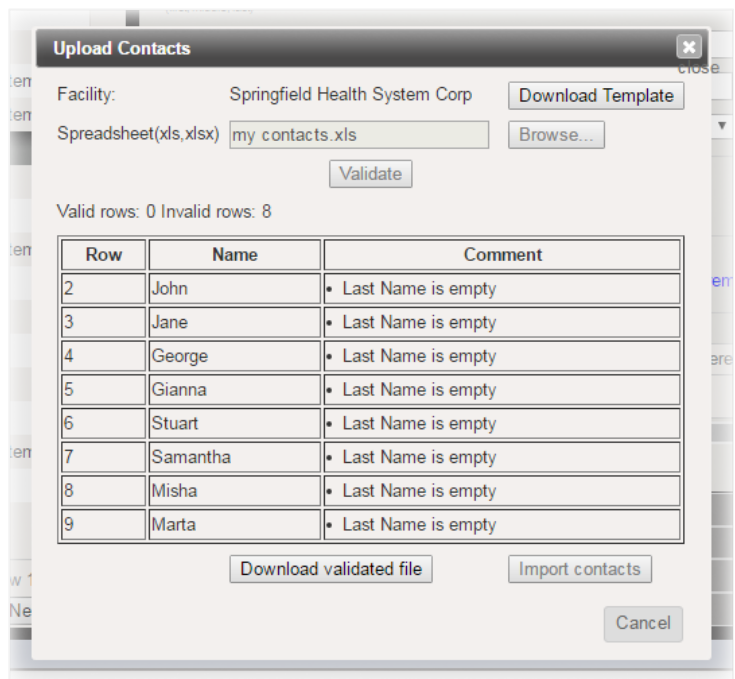
3. Below this field, click **Validate**. Validation results appear.

4. If there are validation errors, click **Download validated file** and take these actions:

   a. Open the file in Excel and correct the errors.

   b. Save the corrected file.

   c. Return to Step 1 of this procedure.

5. When there are no validation errors, click **Import Contacts**. A *Success* message appears.

6. Click **OK**. The contacts have been added to your facility.

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