Add Multiple Activities

If you need to add many new activities at once, instead of **creating an activity** individually, you can create multiple new activities in bulk by uploading a spreadsheet.

For the bulk import, you can upload **all elements** displayed in the index page for that activity *except for:*

- Any of the columns relating to its Partner Organizations (Primary Contact, Primary Organization, Partner Type, Phone, Fax, Email, Address)
- Any of the columns relating to its Budget, since these are calculated from Budget entries (Budget, Obligated, Disbursed, Remaining, Budget (Local), Obligated (Local), Disbursed (Local))

You can use this functionality to:

1. **Create new activities in bulk** (enter new rows in the spreadsheet; anything without an awardID gets added)
2. **Edit existing activities in bulk** (edit the spreadsheet as-is; anything with an awardID gets updated)

Creating New Activities in Bulk

To create new activities in bulk, first go to **Activities** to open the Activities Index page.

On this page, use the gear button in the upper right corner to select the activity columns you want to use:

Once you have the columns you'd like, click the gear button and select "Export" to get an Excel template of all your existing activities:

You can delete all the rows from the export, but it's not necessary. Add the rows for your new activities at the bottom with a **blank** awardID:

	awardID	Name	Short Name	Code	Ref #	Start Date	End Date	Status	Awarding Organization	Mechanism	Sectors	Tags
1	awardID	Name	Short Name	Code	Ref #	Start Date	End Date	Status	Awarding Organization	Mechanism	Sectors	Tags
2	37507	Analysis of Data to Improve Performance	DataAnalysis		00-04-05-06	12/1/2013	2/1/2016	Active				
3	37506	Better Data Management for Better Decision-making	DataBrilliance		00-01-02-03	6/30/2013	2/1/2016	Active				
4	37509	Collecting Data from Disparate Sources	DataCapture		00-10-11-12	1/1/2014	5/31/2016	Active				
5	37503	Definitive Data Doing	DDD	DDD	333	9/30/2014	12/31/2020	Active				Data
6	37508	Entering Data for Better Analysis	DataEntry		00-07-08-09	1/1/2014	5/31/2016	Active				
7	37504	Friendly Data Help	FDH	FDH	111	9/30/2014	12/31/2020	Active				Data
8	37505	Training Extravaganza	TRAIN	TRAIN	222	9/30/2014	12/31/2020	Active				Training
9		Better North American Client Engagement	NAEngage	NAE		1/1/2016	12/31/2020	Active				Engagement
10		Better African Client Engagement	AfEngage	AfE		1/1/2016	12/31/2020	Active				Engagement
11		Better South American Client Engagement	SAEngage	SAE		1/1/2016	12/31/2020	Active				Engagement
12		Better Asian Client Engagement	AsEngage	AsE		1/1/2016	12/31/2020	Active				Engagement
13		Better European Client Engagement	EuEngage	EuE		1/1/2016	12/31/2020	Active				Engagement
14												

(The five rows highlighted with no awardID are the new activities this import will create.)

For new rows in the spreadsheet:

- You can enter multiple Sectors separated by commas, for example: "Health, Education". These need to already exist in your site.
- You can enter multiple Tags separated by commas, for example: "Training, Engagement". These need to already exist in your site.
- Awarding Organization needs to reference an organization that already exists in your site.

Once you have your spreadsheet updated and saved with the new activities you want to add, click the gear icon again and select **Import**:
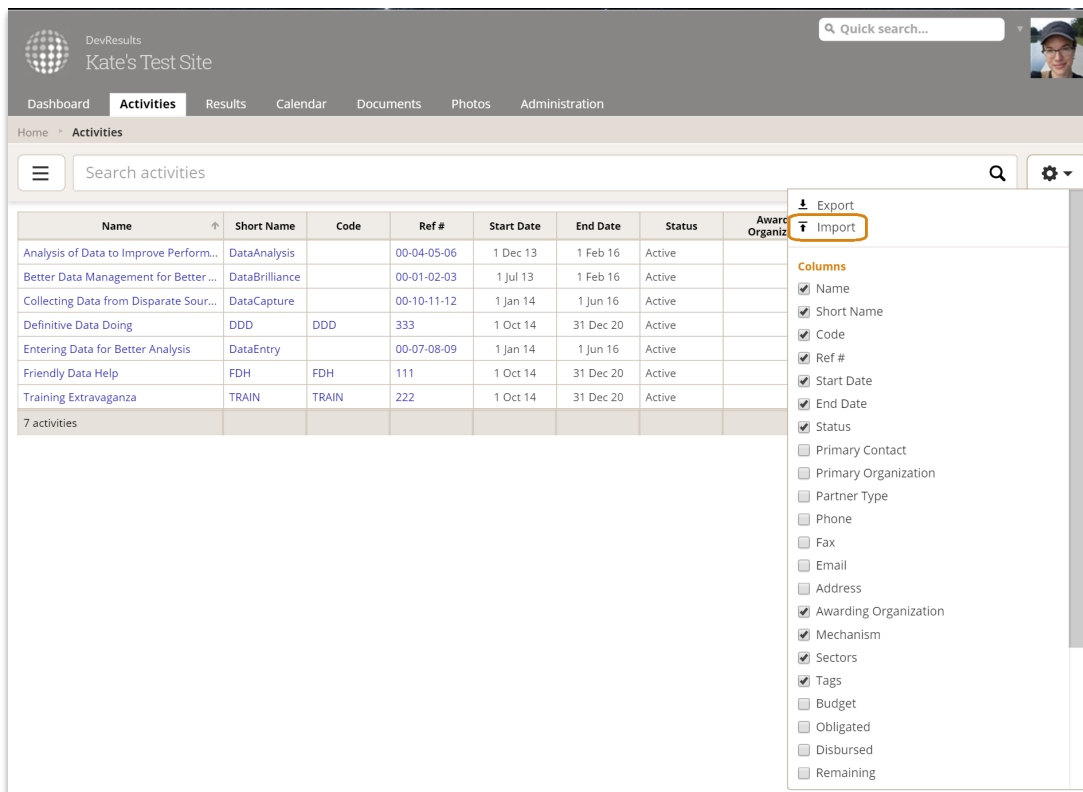
This will open a pop-up window to walk you through the upload process:
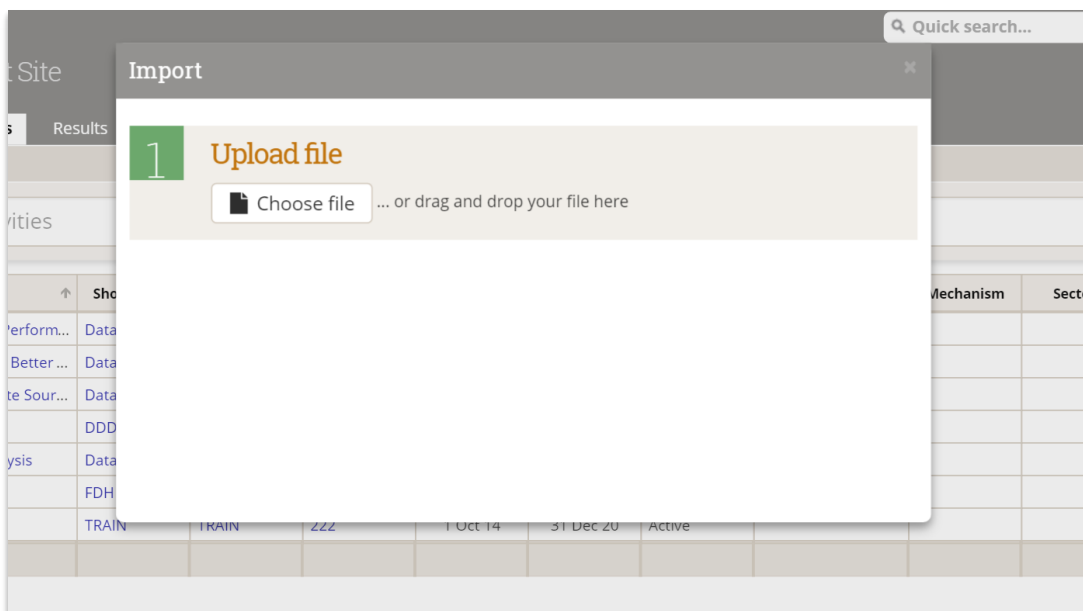
You can click the **Choose file** button to browse to the file or drag the file from your computer directly into this box and drop it here. The system will evaluate the spreadsheet for any invalid fields; it will warn you if it finds any problems with the sheet. If everything looks fine, you'll get a confirmation showing how many activities it found and will import:
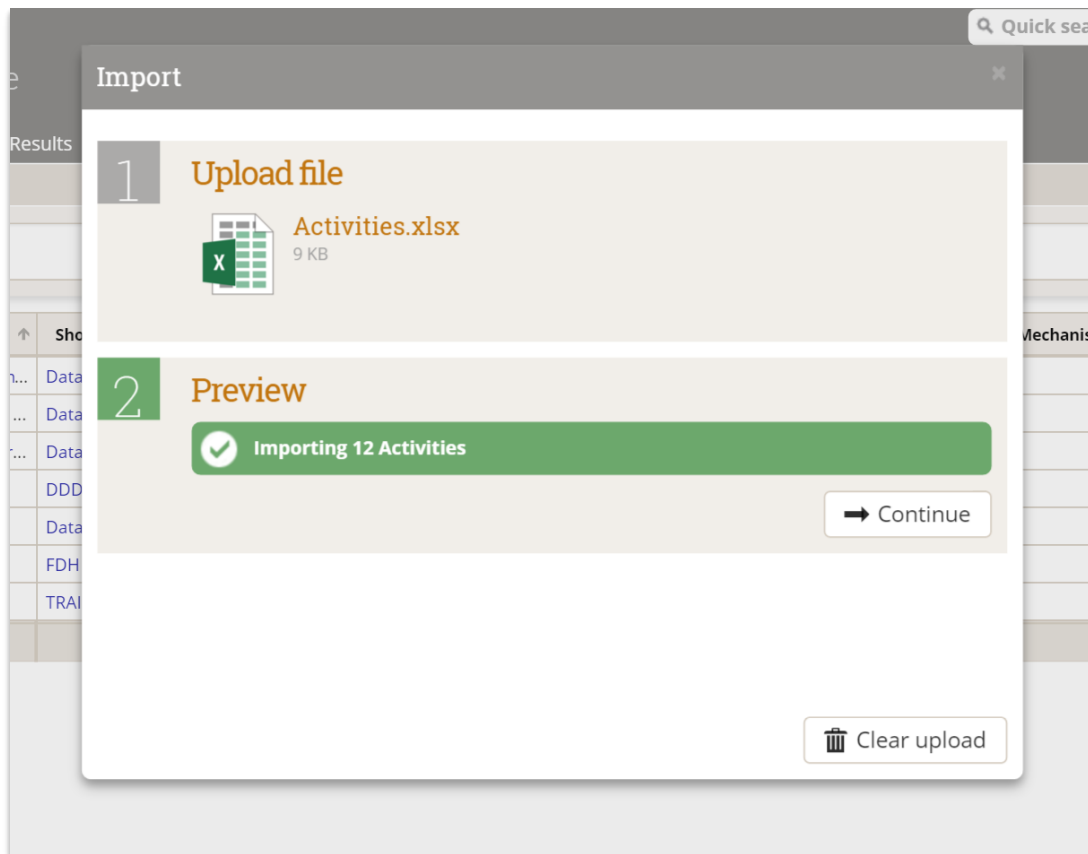
(In this case, I'm seeing 12 activities because I left all of my existing activities in my sheet. Since I didn't make any changes to them, this is fine.) If the number for import looks wrong to you or you get errors that you need to fix, click the **Clear upload** button to remove the file, go edit and save it again, and then restart the process.

Once everything looks good, click the **Continue** button to complete the import:
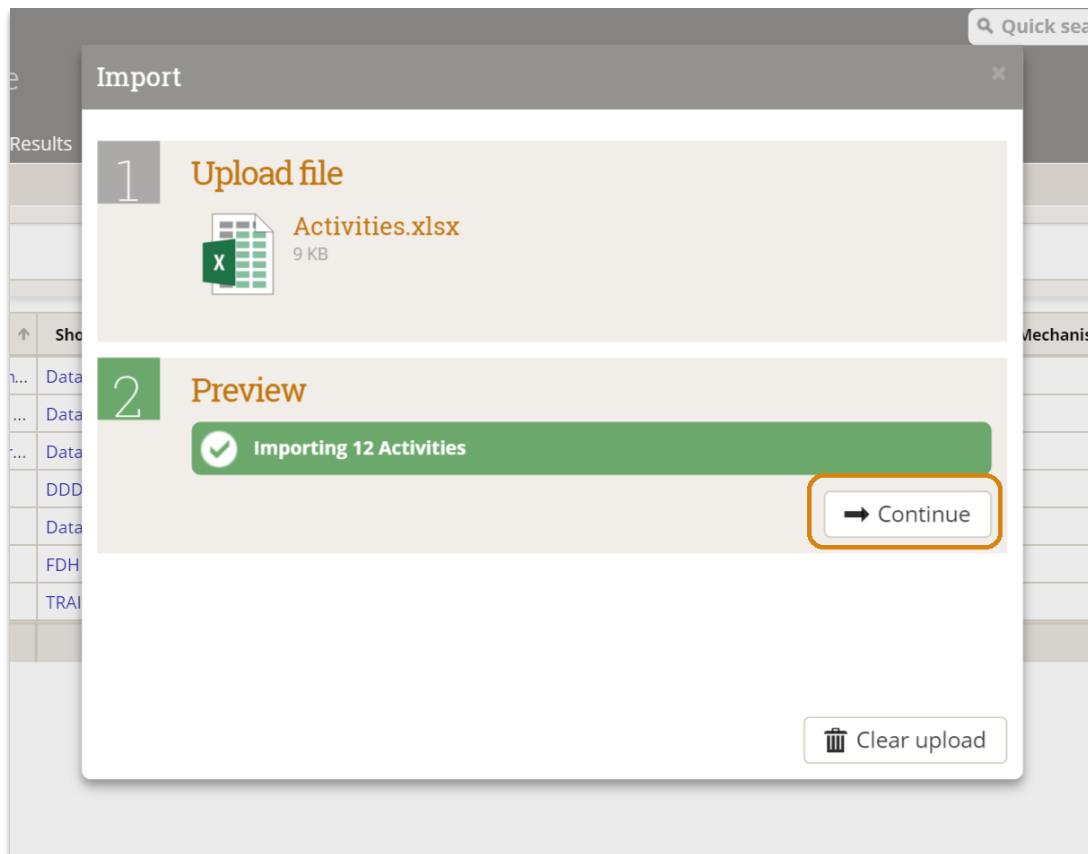
You'll get a confirmation message once the import is complete; click the Done button to close it.
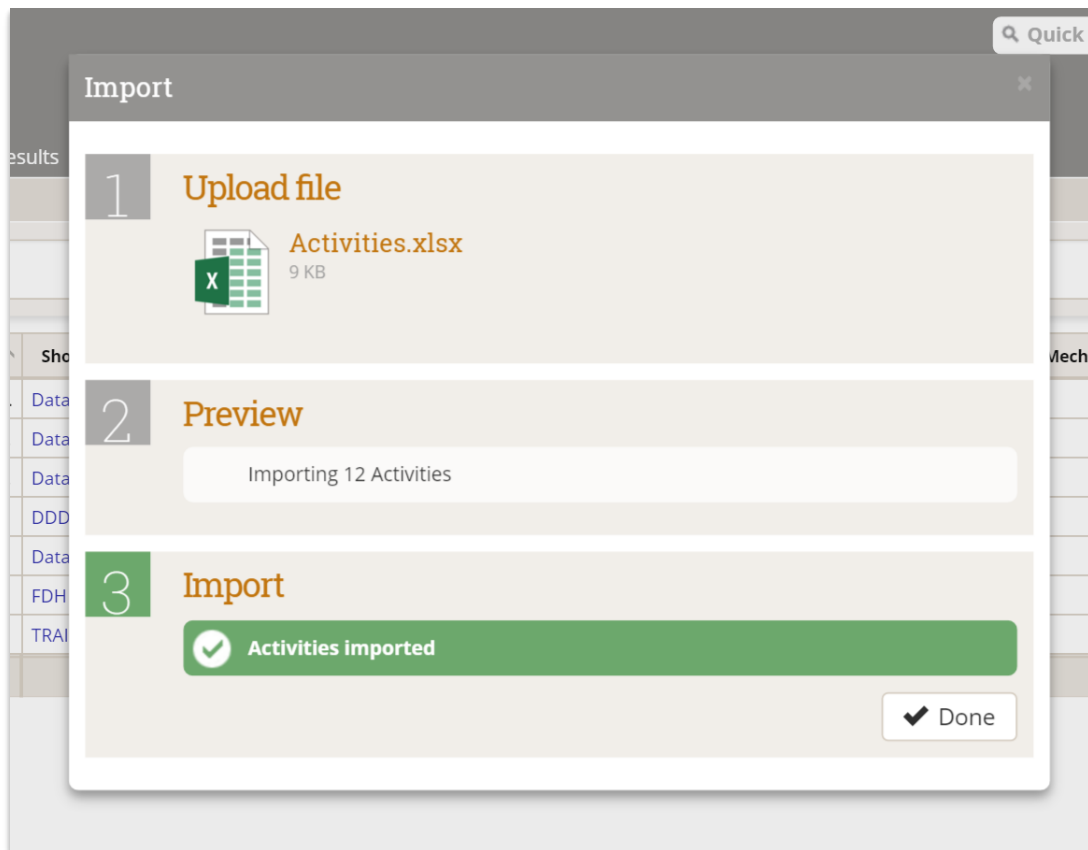
Once you click Done, your Activities Index page will refresh and you'll see your new activities there!

Editing Existing Activities in Bulk

You can also use this tool to complete bulk updates to existing activities. To do so, follow the first few steps to download your Activities Index into Excel. Then edit the spreadsheet that you downloaded--for example, to add a new Sector or Tag to the Activities.

When you import the spreadsheet, it will update the activities in place.

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