# Modifications to the Online Unit Directory

Base data for the online directory is obtained from the **roster.csv** file sent to the Unit by the ACBL on a periodic basis.  Local exceptions to this data are maintained by the unit in a file – **exceptions.csv** – maintained periodically and on request by various ACBL members.

## To refresh base data

On a periodic basis, a new **roster.csv** is sent to the unit by the ACBL.  As warranted (based in level of change, or on member requests), unit board members may also go to the ACBL to request a current roster.

Once the latest **roster.csv** file is obtained, on the Denver website server, go to **uploads/Membership/Directory/data**. Rename the existing roster.csv file with the trailing date-stamp (YYYYMMDD) of the original upload, then upload the new **roster.csv**.

**Note**: existing local changes in **exceptions.csv** file will be applied automatically.

## To make manual changes to the directory

Before making changes to the directory, a current version of **exceptions.csv** should be downloaded from the website, or obtained from the webmaster or directory editor.

All manual changes to the directory are made based on ACBL number.  This means that – at this time – a non ACBL member will not have access to the directory.  Manual changes are made in the **exceptions.csv** file.  This file currently has 7 columns:

1. ACBL# - This is the key for the person to add, change or delete.
2. Hide –  This allows for privacy of individual members.  If this field has ANY value other than NULL, the member indicated by ACBL# will not be shown in the directory.
3. Guest – This field should be filled in for non-Denver ACBL members.  It indicates that the individual is not a Unit 361 member, and suggests a logical reason that they might be listed in the directory.  The value of this field is listed (in parenthesis) next to the name in the directory.  The recommended value is "Uxxx" or "Unit xxx" where xxx is the home unit designation of the individual.
4. Name - This is the full name, as it should be displayed, for the individual.
5. Email -  This is the preferred email for the individual.
6. Phone - This is the preferred contact phone number for the individual.
7. Notes - This is a free-form notes field for the editors of the **exceptions.csv** file.  It is not used in any way by the directory subroutines.

### To add someone to the directory

Fill in the ACBL number, the value of the guest field (Uxxx), the name (Last, First), the email and the phone fields.  Add notes as appropriate.  Make sure to leave the "Hide" column empty.

Examples:

| ACBL# | Hide | Guest | Name | Email | Phone | Notes |
|---|---|---|---|---|---|---|
| Z222222 | | U360 | Dietrich, Daryl | dietrichdaryl@gmail.com | 222-222-2222 | Access as COS dir editor |
| R999999 | | ACBL CEO | Gidwani, Bahar | bgidwani@bogus.com | 101-111-2222 | Da boss |

## To prevent someone from being listed

Fill in the ACBL number.  Put something in the Hide field.  All other fields are ignored.

| ACBL# | Hide | Guest | Name | Email | Phone | Notes |
|---|---|---|---|---|---|---|
| 8173052 | Y | | Vetter, Rob | | | Totally paranoid about people using personal info |

## To change the way data is displayed for an Individual

Fill in the ACBL number.  Fill in the information that the user wishes to change.  Fill in a meaningful description in Notes.

| ACBL# | Hide | Guest | Name | Email | Phone | Notes |
|---|---|---|---|---|---|---|
| Q187088 | | | | | 720-529-8321 | Doesn't want to register phone number with ACBL but wants unit to have it. |
| J345761 | | | | | 303-393-7000 | Office number preferred |
| Q522065 | | | Brum de Barros, Marion | | | Name munged by ACBL database |
| Q250081 | | | | | 303-406-1280 | ACBL won't support separate phone numbers on household accounts. |

## To apply new exceptions file

Once **exceptions.csv** has been modified, on the Denver website server, go to **uploads/Membership/Directory/data**. Rename the existing **exceptions.csv** file with the trailing date-stamp (YYYYMMDD) of the original upload, then upload the new **exceptions.csv**.