

Batch Processing via the greenID Admin Panel

Administrators have the ability to process a small batch file (up to 20,000 records) via the greenID admin panel where you can upload a file containing the individuals Name and Address and DoB information to be checked against non consent data sources / watchlists and or against the Australian Death Check service.

1. You can start the batch process by clicking into the IMPORTS menu, followed by IMPORT FILE.

(If the IMPORTS menu option is not available to you, please contact greenid.support@gbgplc.com to enable this).



2. Next step is to upload the file. We have several batch formats that can be uploaded and they can be downloaded from here:

AU_greenID_import_template.csv

AU_greenID_import_template_Australian_death_check.csv

NZ_greenID_import_template.csv

AU_greenID_import_template_split_address.csv

NZ_greenID_import_template_split_address.csv

GB_greenID_import_template_split_address.csv

batch_upload_sample_watchlistonly.csv

batch_upload_sample_watchlistonly_country.csv

Single_rule_and_address_configured_ADC.csv

Single_rule_and_no_address_configured_ADC.csv

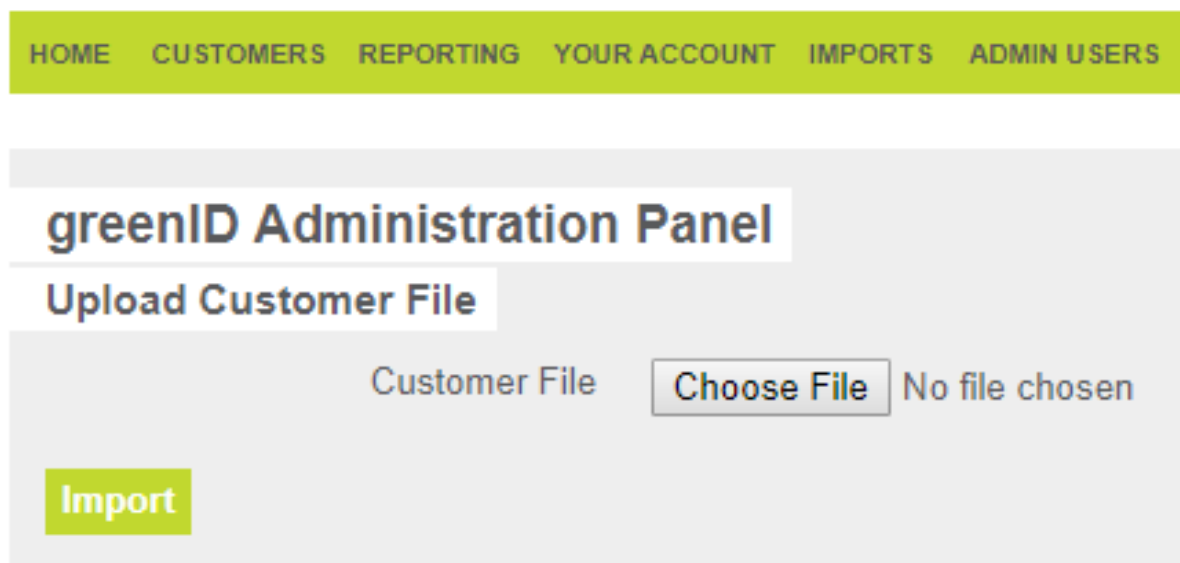
Multi_rule_and_address_configured_ADC.csv

Multi_rule_and_no_address_configured_ADC.csv

It's important that the template column headers are not modified as greenID has been programmed to look for these column names and process the file accordingly.

- Instructions: greenID_import_template
- Instructions: greenID_import_template_split_address
- Instructions: greenID_import_template_with_ruleid_NO_address_ADC

3. Once the file is completed and ready to upload, please ensure that the file has a unique file name.



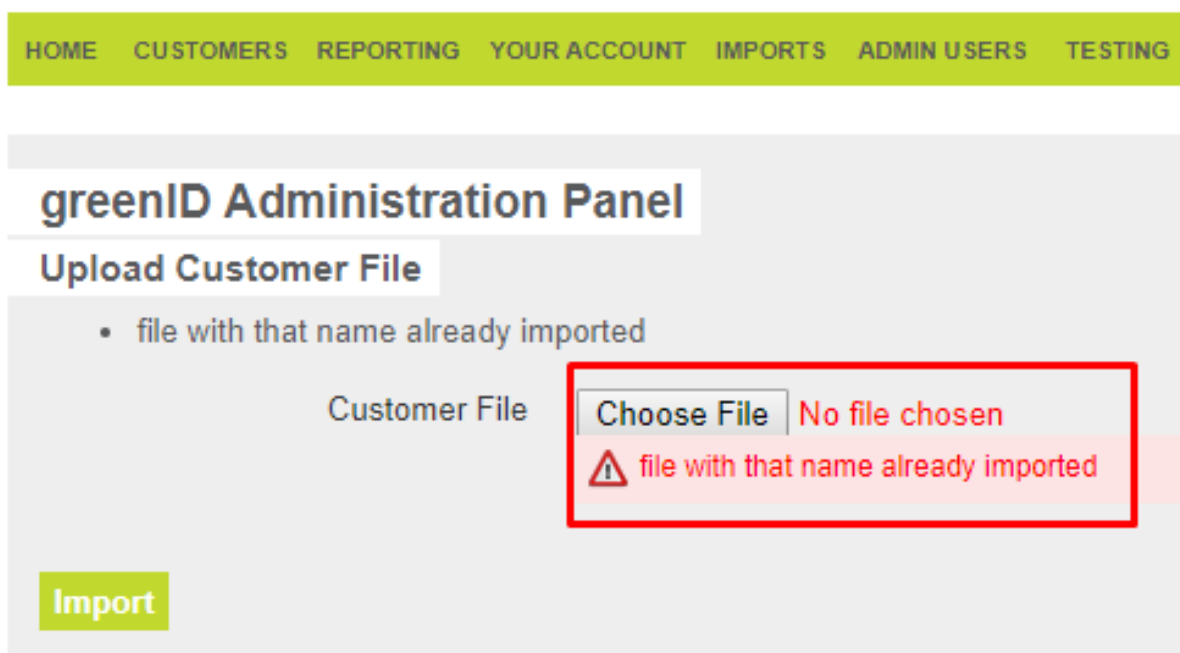
HOME CUSTOMERS REPORTING YOUR ACCOUNT IMPORTS ADMIN USERS

greenID Administration Panel

Upload Customer File

Customer File No file chosen

4. If you upload a file with a similar name as a previous file, greenID will show an alert to advise that a file with that name has already been imported eg below:



HOME CUSTOMERS REPORTING YOUR ACCOUNT IMPORTS ADMIN USERS TESTING

greenID Administration Panel

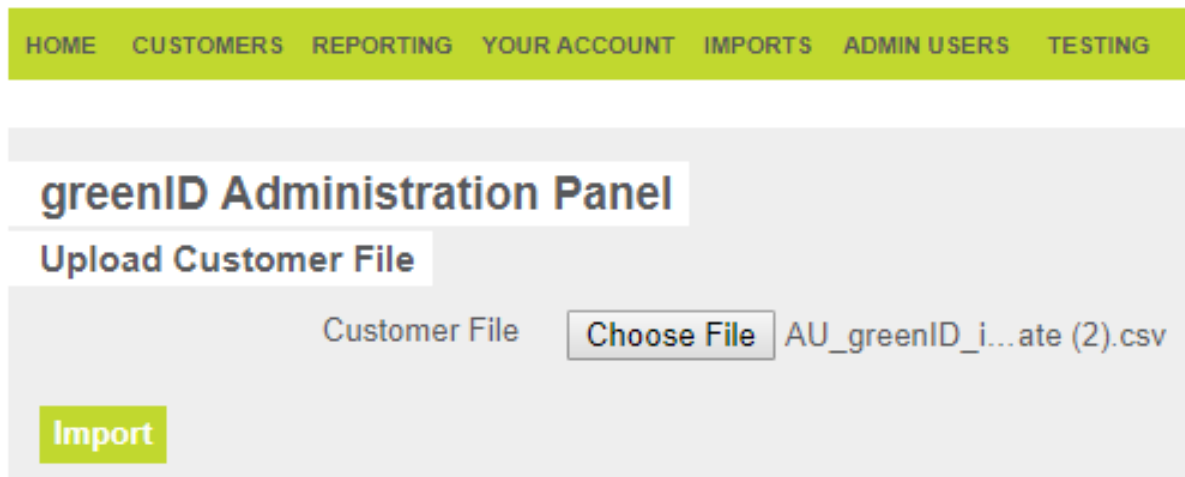
Upload Customer File

- file with that name already imported

Customer File No file chosen

file with that name already imported

5. Once you have selected the right file, click on the Import button.



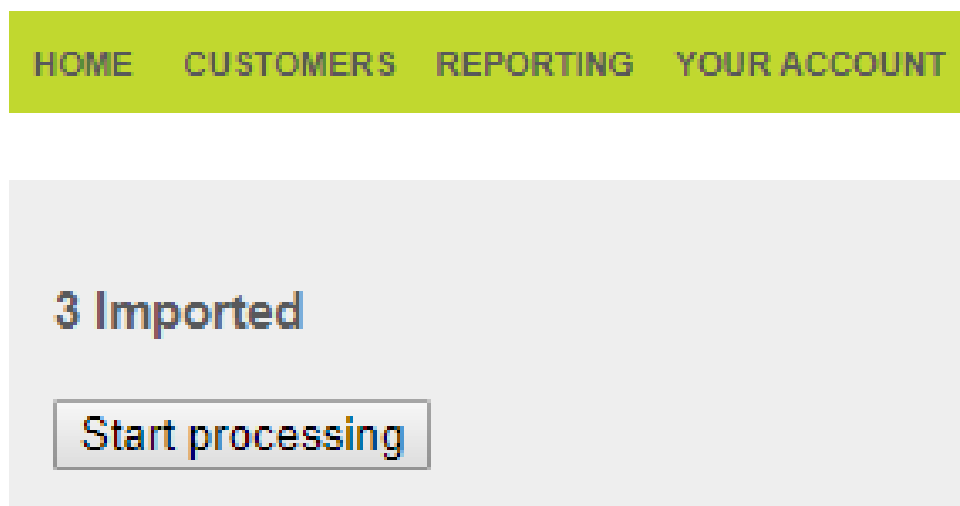
HOME CUSTOMERS REPORTING YOUR ACCOUNT IMPORTS ADMIN USERS TESTING

greenID Administration Panel

Upload Customer File

Customer File AU_greenID_i...ate (2).csv

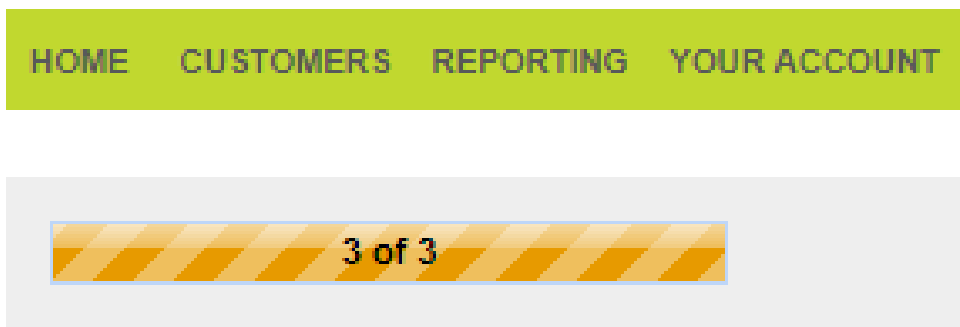
6. If the file has been imported correctly, you should see the number of records imported. If you see a zero (0), that means that there was an error with your file and you should open and check to see if the format is correct and all columns are completed.



HOME CUSTOMERS REPORTING YOUR ACCOUNT

3 Imported

7. Once you are ready, click on "Start processing" button to begin the batch process. Depending on the number of records, this may take some time.



HOME CUSTOMERS REPORTING YOUR ACCOUNT

3 of 3

8. Once greenID has finished processing the file, you will see a completed message and also links to two options:

1. **Download Summary** – clicking on this will open a summary page that requires further development work from our team and should be ignored for now.

HOME CUSTOMERS REPORTING YOUR ACCOUNT IMPORTS ADMIN USERS

Completed: AU_greenID_import_template (1) v2.csv

[AU_greenID_import_template \(1\) v2.csv](#) or [view imported files](#)

2. **View imported files** – will display a page that shows all files uploaded to greenID and a summary showing how many were verified in accordance with the overall verification rule. Click on a File Summary for a summary of each verification for that specific batch.

HOME CUSTOMERS REPORTING YOUR ACCOUNT IMPORTS ADMIN USERS SYSTEM STATUS

greenID Administration Panel

Uploaded files

FILE SUMMARY	IMPORTED	RECORDS	VERIFIED	IN PROGRESS	WATCHLIST MATCHES	ERRORS
IDNumber17_A.csv	09 Jan 19 16:35	9998	7881	2117	128	0
IDNumber16_A.csv	09 Jan 19 13:30	9999	7913	2086	127	0
IDNumber15_A.csv	09 Jan 19 10:33	9999	8113	1886	124	0
IDNumber14_A.csv	09 Jan 19 09:00	9997	8066	1931	161	0
IDNumber13.csv	08 Jan 19 21:20	9999	8082	1917	162	0
IDNumber12.csv	08 Jan 19 18:57	10000	8083	1917	151	0
IDNumber11.csv	08 Jan 19 16:34	9999	7953	2046	152	0
IDNumber09_A.csv	08 Jan 19 12:00	9998	7869	2129	126	0
IDNumber06_A.csv	02 Jan 19 11:52	10000	7438	2562	32	0
IDNumber05_A.csv	02 Jan 19 11:49	10000	7802	2198	36	0
IDNumber04_A.csv	02 Jan 19 11:48	10000	7990	2010	23	0
IDNumber03_A.csv	02 Jan 19 11:45	9999	7938	2061	19	0
IDNumber02_A.csv	02 Jan 19 11:39	9997	7935	2062	22	0
IDNumber01_A.csv	02 Jan 19 11:36	9999	7966	2033	20	0
IDNumber00_A.csv	02 Jan 19 11:34	9996	8040	1955	36	0

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	meID	firstName	middleName	lastName	dob	number	mailCountry	Date Created	Rule ID	Verification Stat	Date Verified	Watchlist Basic	Watchlist Premium	Extended PEP	Error Reason
2	284001	Jane	Jo	Smith	20/03/1999	9903200330001	Australia	09/01/2019 16:35	ruleSetG	In progress	09/01/2019 16:35				
3	284001	John	Peter	Smith	05/07/1995	9903200330001	Australia	09/01/2019 16:35	ruleSetG	Verified	09/01/2019 16:35				
4	284001	James	Terry	Doe	09/08/1986	9903200330001	Australia	09/01/2019 16:35	ruleSetG	Verified	09/01/2019 16:35				
5	284001	Jane	Jo	Smith	16/08/1989	9903200330001	Australia	09/01/2019 16:35	ruleSetG	Verified	09/01/2019 16:35				
6	284001	John	Peter	Smith	28/11/1997	9903200330001	Australia	09/01/2019 16:35	ruleSetG	Verified	09/01/2019 16:35				
7	284001	James	Terry	Doe	20/10/1998	9903200330001	Australia	09/01/2019 16:35	ruleSetG	Verified	09/01/2019 16:35				
8	284001	Jane	Jo	Smith	27/02/1995	9903200330001	Australia	09/01/2019 16:36	ruleSetG	In progress	09/01/2019 16:36				
9	284001	John	Peter	Smith	17/04/1993	9903200330001	Australia	09/01/2019 16:36	ruleSetG	Verified	09/01/2019 16:36				

9. To export a report of the batch showing each record and what they matched on, you will need to go back to the main home screen and click on Show Filter and set the date period to the day you performed the back. Once the results are populated you can then export the results to excel or CSV file format.