

# - MedSIS 3C -

# Trainee Information Import Documentation

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### MedSIS 3C

## **Trainee Information Import**

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## **1. Import Functionality**

A new import tool has been created in MedSIS 3C. This tool can be used to import information in specific pre-defined templates.

MedSIS 3C	20LTY OF HEALTH SOENCES MAATER UNIVERSITY	0 ≙ ⊕ ≡
👗 K4Y Admin	Home > Trainee Registration > Import > Import Ceneric	• Z
<ul> <li>⋠ Home</li> <li>▲ Trainee Search</li> <li>▲ New Trainee</li> <li>■ Table Lookup</li> </ul>	Emports Configure imports based on the predefined import types Configuration Execution Log	V Scheduled
Import Import Ceneric Import CPSO CPSO Import Log Import CMPA CMPA Import Log	Q Search     x       Trainee Email Import     Import Type: Hospital Details Badge Import       Badge Import     File Type: Excel       Dictation Import     Partial Import (● YES)	
Import CaRMS Data     CaRMS Import Log     Import MAC Credentials     Import Trainee Pictures     Export     Mappings     Setup	Source: Uplead   File: Drag file or click to upload.  I I I I I I I I I I I I I I I I I I I	

The tool can be found under Trainee Registration – Imports – Import Generic

The configurations for the badge, dictation and trainee email have all been setup to accept uploads in Excel format.

The tool allows for additional configurations to be setup for existing import types and provides functionality to schedule imports when required. Imports can be uploaded from Excel, received from an email address, received from a FTP site, etc. For the purpose if this document, the upload functionality has been described.

A template of each import type can be downloaded through the 'Download Template'

The import can also set to import partial data (validated rows only) or no data at all using the impartial import toggle.

#### 1.1. Scheduling Imports

Imports can be scheduled using the 'Scheduling' function. This is done by clicking on the 'Scheduled' button.

	and the second se	
O Schedule Details	×	Schedule
🗰 Trainee Email Import	× Inactive	· · · · · · · · · · · · · · · · · · ·
Daily, starting with 11-May-2018, 6:00 am		
Every 5 minutes between 8:00 am and 8:00 pm		
	+ Add New X Close	

Any existing schedules will appear already. They can be edited by clicking on the name of the schedule for example 'Trainee Email Import'



To add a new schedule click the 'Add New' button.

O Schedule Details	×
Configuration	n: Badge Import
<ul> <li>One time</li> <li>Daily</li> <li>Weekly</li> <li>Monthly</li> </ul>	Start Date:* 11-May-2018 16:25 Every: 1 days Repeat every 60 minutes between 8:00 and 20:00 End Date: 11-May-2018 16:25 Max Nr:
	🖺 Save 🗶 Cancel

Select a configuration and then add the schedule details. To activate the schedule ensure that the active toggle is on. 'Save' the schedule.

## 2. Badge Import

To run the badge import, click on the 'Badge Import'. Drag and drop the file for upload into the 'File' box.

Home > Trainee Registration > Import > Import Ge	reric	• 2
i≘ Imports		
Configure imports based on the predefined imp	ort types	✓ Scheduled
Configuration Execution Log		
Q Search X		
Trainee Email Import	Import Type: Hospital Details Badge Import	
Badge Import	File Type: Excel 🗸 🕹 Download Template	
Dictation Import	Partial Import: ( VES )	
	Source: Upload	
	File: Drag file or click to upload.	
	Badge_Import_TestCase2.xis x	
		1
+ Create New Configuration	🖺 Save Config 📋 Delete Config	🕈 Run 🗸 Preview

At this point you can choose to 'Preview' or 'Run' the import.

If preview is clicked, a preview will appear with all validated and non-validated data.

		Generic				
CCESS! Ilguration has been	successfully saved.					
Imports						
onfigure imports	s based on the predefined	import types	;			✔ Sche
onfiguration E	execution Log					
adge Import						🗲 Re
There is/are 1	valid lines					
	tana mitoo.					
All Data						
Data Previe	ew.					To
Search:						4 Ru
	Row Number	*	Student Number	Hospital Code		
	1		920007563	MIP	546376	• ОК

If you are satisfied with the date, you can run the import by clicking the 'Run' button.



Imports - Bad	ge Import		×
Executed By: Admin, Execution Date: 11-Ma	K4Y ay-2018 / 14:36:31, Duration: 1.37 seconds		SUCCESS
<ul> <li>1 valid line(s).</li> <li>1 line(s) success</li> </ul>	fully imported.		
		🕴 Re	epeat Execution X Close

Show 25 V entries

#### Validations:

The match to find the trainee will be by OPHRDC #.

- If OPHRDC # doesn't exists provide err, record will be skipped
- If Trainee found, and a different Badge # exists for the Hospital Code provide warning, a Badge # already exists for the Hospital Code; record will be skipped
- If Trainee found, and Badge # exists for a different user for the Hospital Code, provide err, record will be skipped;
- If Trainee found and Badge # doesn't exists for the Hospital Code, new Badge # will be added.

## 3. Dictation ID Import

The same process occurs for the Dictation ID as the Badge ID.

Validations include:

- If OPHRDC # doesn't exists provide err, record will be skipped
- If Trainee found, and a different Badge # exists for the Hospital Code provide warning, a Badge # already exists for the Hospital Code; record will be skipped
- If Trainee found, and Badge # exists for a different user for the Hospital Code, provide err, record will be skipped;
- If Trainee found and Badge # doesn't exists for the Hospital Code, new Badge # will be added.

## 4. Trainee Email Import

The same process occurs for the Trainee Email Import as the Badge/Dictation imports.

Validations include:

The match to find the trainee will be by Last Name and Email. Validation rules:

- If Last Name, and Email don't match an existing trainee, provide err, record will be skipped
- If Trainee found, and Medportal email exists for the learner, provide warning, email already exists; if medportal is not the default address, mark it as default
- If Trainee found, and Medportal email exists for a different user, provide err, record will be skipped; accounts will need to be merged manually
- If Trainee found and Medportal email doesn't exists, new email will be added and marked as default.



# 5. Execution Log

The execution log will maintain a history of all success and error messages in the system.

ome > Trainee Registration > Import > Import > Import Ceneric 🔅 🦼						
i∃ Imports						
Configure impo	rts based on the predefined import types				✓ Scheduled	
Configuration	Execution Log					
Execution Log					Total : 9	
Search:	Run by All					
Log Id 🖉	Configurations	Execution Date	Duration	Executed By	Execution Status	
8696477	Trainee Email Import	May , 11 2018 / 14:50:16	2.29 seconds	Admin, K4Y	ERROR	
8696475	Badge Import	May , 11 2018 / 14:50:07	1.35 seconds	Admin, K4Y	SUCCESS	
8696472	Badge Import	May , 11 2018 / 14:36:31	1.37 seconds	Admin, K4Y	SUCCESS	
8696412	Dictation Import	May , 11 2018 / 10:21:09	1.70 seconds	Admin, K4Y	ERROR	
8696410	Dictation Import	May , 11 2018 / 10:19:31	1.33 seconds	Admin, K4Y	ERROR	
8696259	Badge Import	May , 11 2018 / 10:17:24	2.95 seconds	Admin, K4Y	SUCCESS	
8696197	Trainee Email Import	May , 11 2018 / 10:07:50	1.07 seconds	Admin, K4Y	ERROR	
8696135	Trainee Email Import	May , 11 2018 / 09:55:00	1.59 seconds	Schedule	EXCEPTION	
8696125	Trainee Email Import	May , 11 2018 / 08:38:55	4.63 seconds	Admin, K4Y	ERROR	
Showing 1 to 9 of	9 entries Show 10 v entries				t Previous 1 Next Last	

To view the details of each log, click on the 'Log Id' and the details appear.

Imports - Trainee Email Import	×	
Executed By: Admin, K4Y	ERROR	
Execution Date: 11-May-2018 / 14:50:16, Duration: 2.30 seconds		
<ul> <li>3 valid line(s).</li> <li>3 invalid line(s)</li> </ul>		
		ati
I ne tollowing line(s) contain errors or warnings		se
Line #1: Could not find student		se
Line #3: Could not find student		se
Email used by another user.		se
Email used by another user.		se
<ul> <li>3 line(s) successfully imported.</li> </ul>		
		e
		se
		se
		se
	Repeat Execution X Close	