- MedSIS 3C -

Trainee Information Import Documentation

Prepared by:

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MedSIS 3C

Trainee Information Import

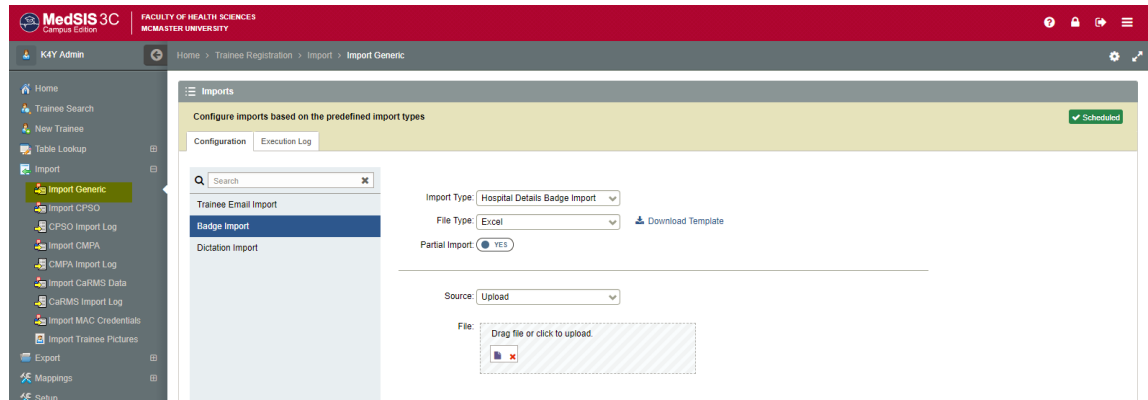## TABLE OF CONTENTS

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.

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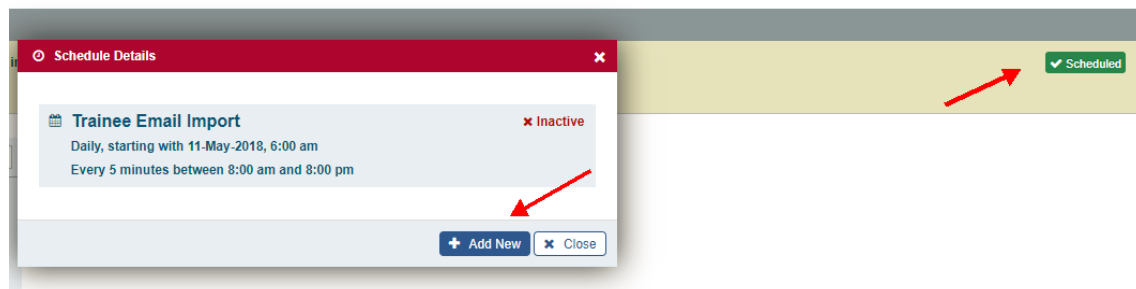
Any existing schedules will appear already. They can be edited by clicking on the name of the schedule for example 'Trainee Email Import'

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

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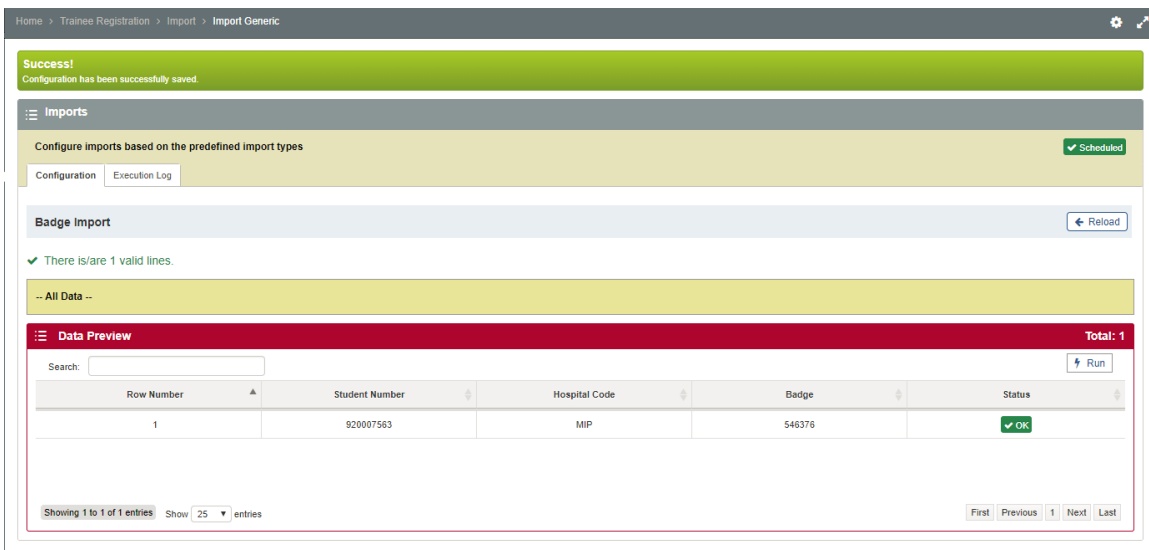
2. Badge Import

To run the badge import, click on the 'Badge Import'. Drag and drop the file for upload into the 'File' box.
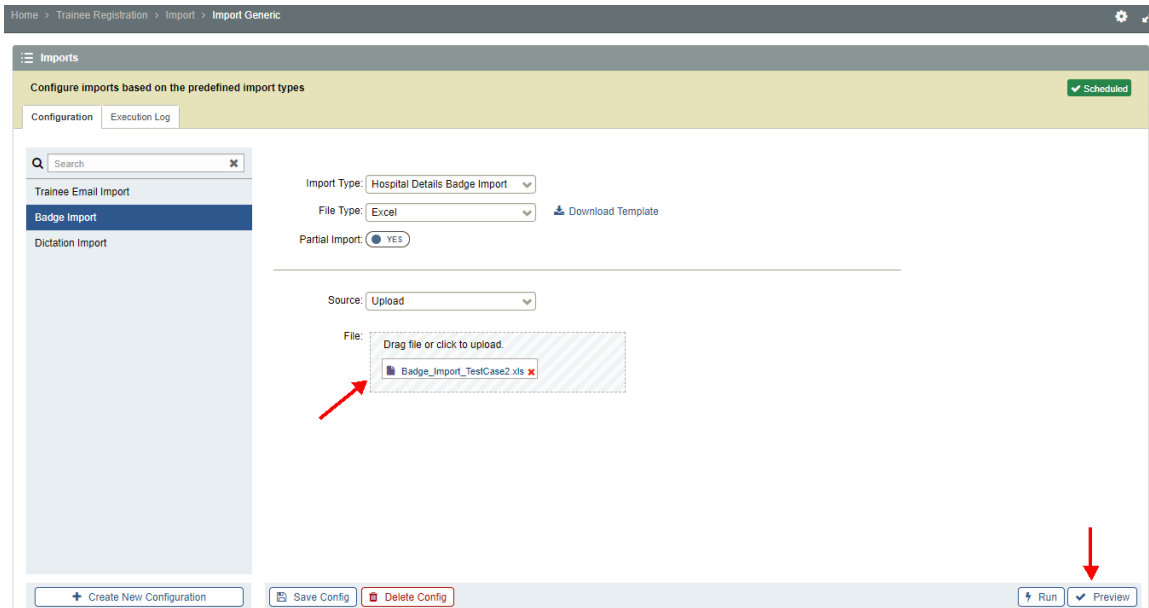
At this point you can choose to 'Preview' or 'Run' the import.

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

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

Imports - Badge Import

✖

Executed By: **Admin, K4Y**

SUCCESS

Execution Date: **11-May-2018 / 14:36:31**, Duration: **1.37 seconds**

✔ 1 valid line(s).
✔ 1 line(s) successfully imported.

⚡ Repeat Execution   ✖ Close

Show 25 ▼ 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.

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