Import Module

Configuration · https://toxicalldemo.com/docs/tox5/import-module/

Overview

toxiCALL® provides a sophisticated Import Module to help populate data, such as lookup lists. This Module is designed to read data from Microsoft Excel and allow you to map the columns to specific data fields within toxiCALL®.

This document will walk you through a sample of importing Healthcare Facilities into toxiCALL® starting with the Healthcare Facilities List (UHCF). The Import module's flexibility is designed to work with different data sets, even Free Areas if you wish to import a variety of data for use within toxiCALL®.

Removing Data After Import

When importing data, it is essential to remember that deleting data is not always available. For example, if a Healthcare Facility is added and used within a case, it cannot be deleted.

Importing Healthcare Facilities

Preparing your HCF data

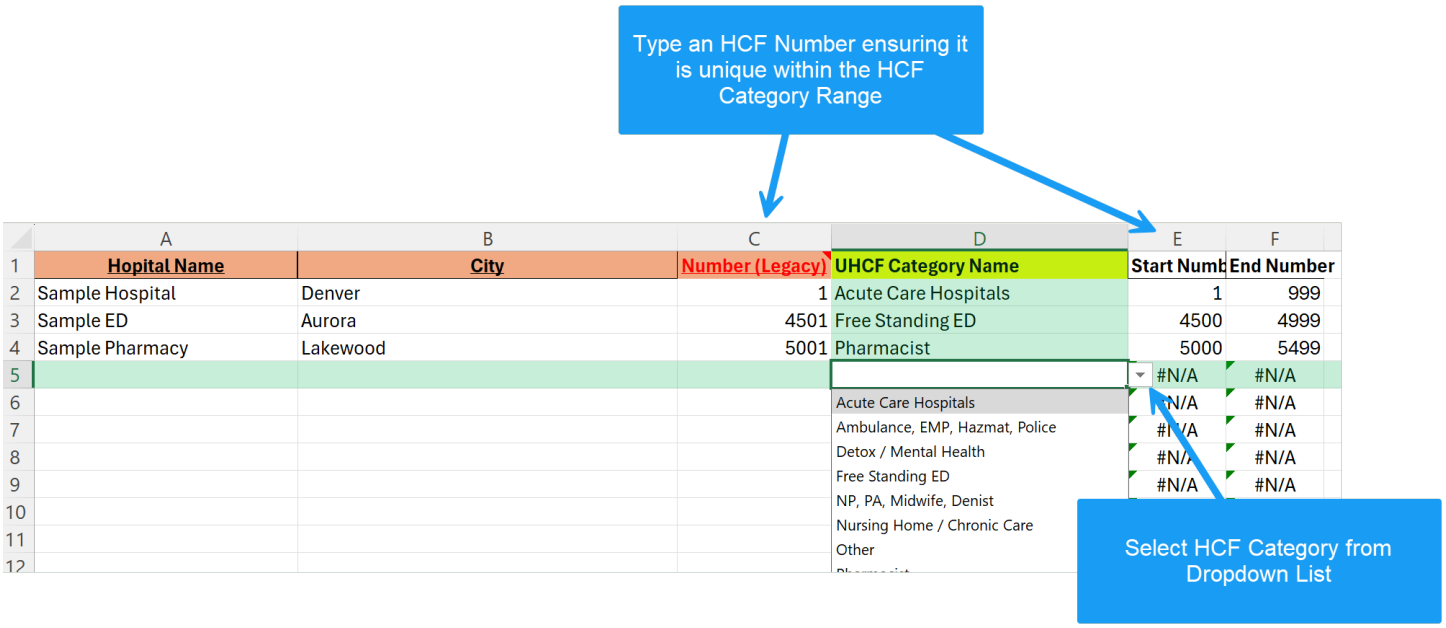
Start by Loading the Healthcare Facilities List using the side panel menu by selecting Configuration-->Data Lookup Management-->UHCF.

Healthcare Facilities Template

The HCF template can be downloaded to populate the required fields, including the HCF Number and Category.

HCF List - TemplateDownload

This HCF template is designed to allow entry of the hospital name, city, number, and Category. These are the minimum data items required to save an HCF to pass validation. However, this spreadsheet has been updated to allow the category to be selected from a dropdown list. Additionally, the number must be unique and within a specific numerical range based on the Category. Please note that the Category Range will be presented after the Category has been selected.



Importing the HCF Data from Excel

For this example, we have defined the Import Definition, which can be downloaded below. This section will also detail how to build the definition from scratch.

HCF List - DefinitionDownload

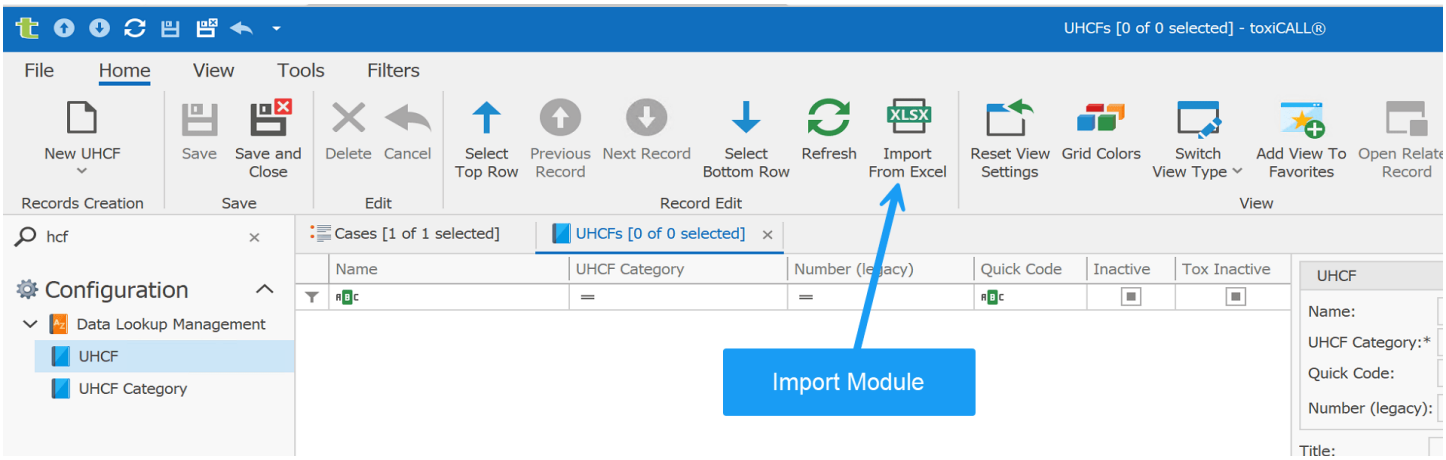
Click here for details on how to import the definition file.

Start by loading the Healthcare Facilities List using the side panel menu and selecting Configuration-->Data Lookup Management-->UHCF.

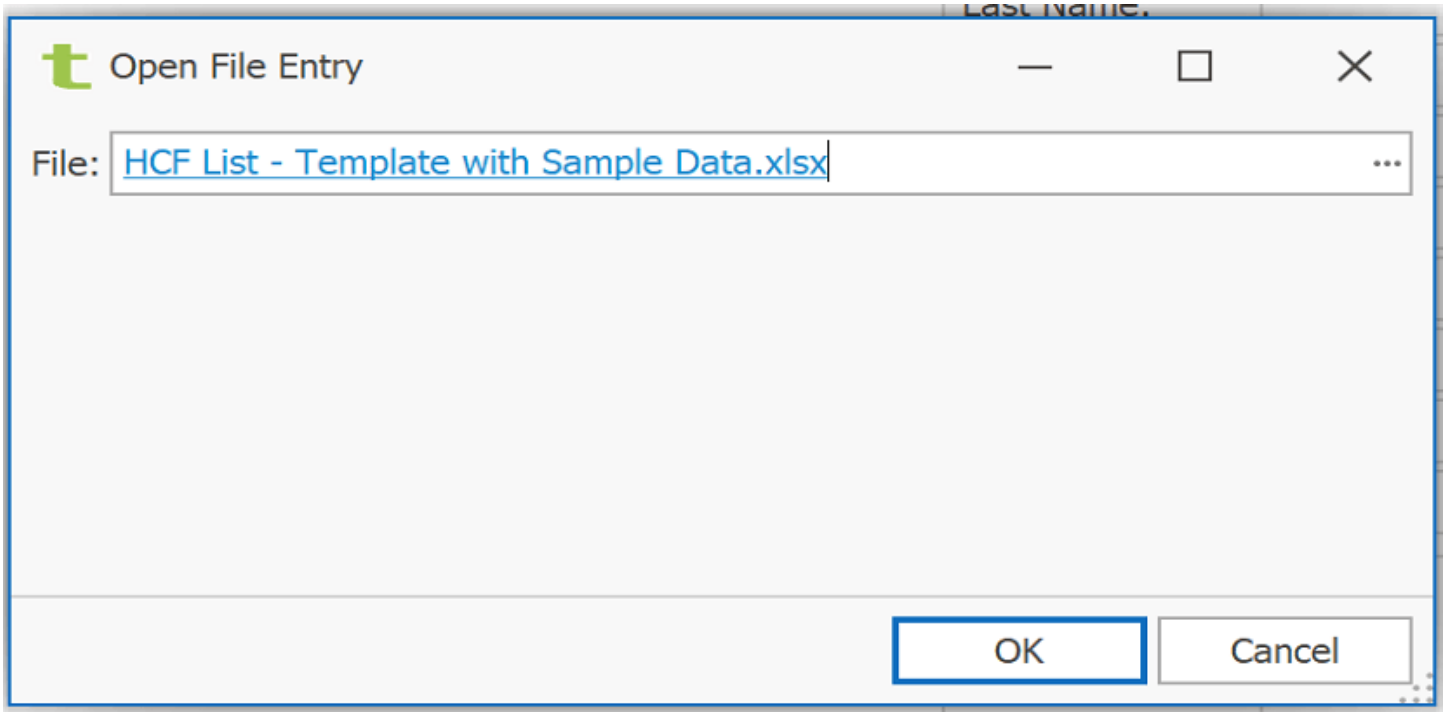
Select the property Import Option

Do **not** use the Menu option shown in File-->Import, as this is designed for toxiCALL® specifically defined data.

After loading the HCF List, click the Import from Excel icon on the ribbon bar, as shown in the following image.



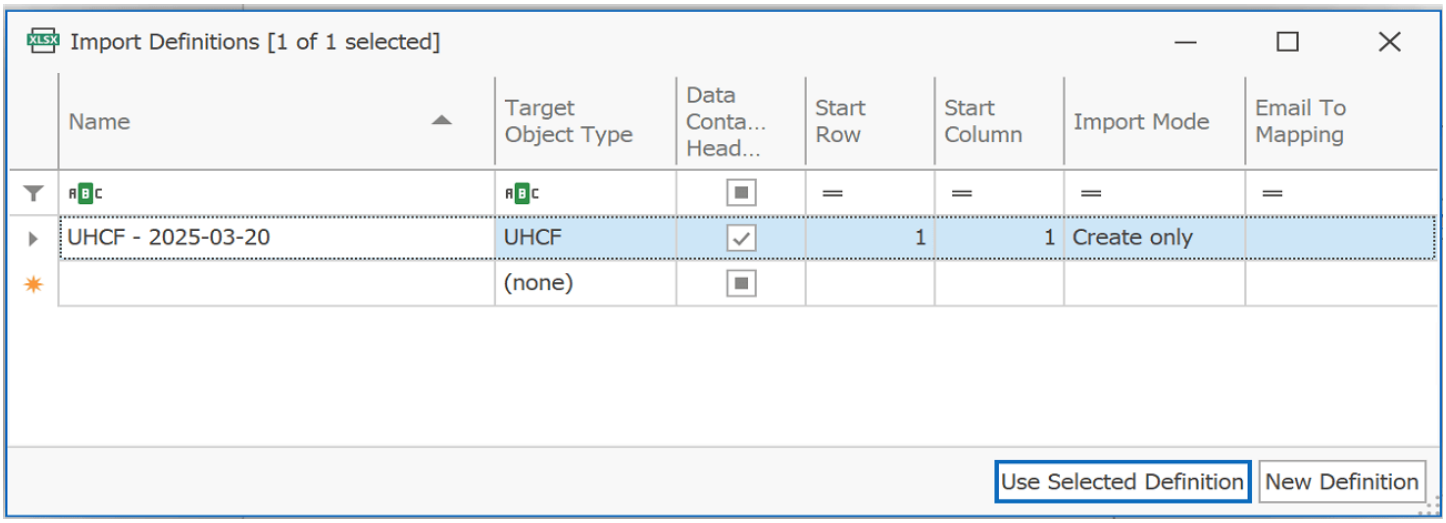
Next, you will select the file of your curated HCF List. Ideally, it can be based on the template, but this is not required.



Import Templates

Templates can be pre-defined and used to assist with importing data. After creating a successful import, the template will be saved automatically to be used in the future or even exported and shared with other toxiCALL® users.

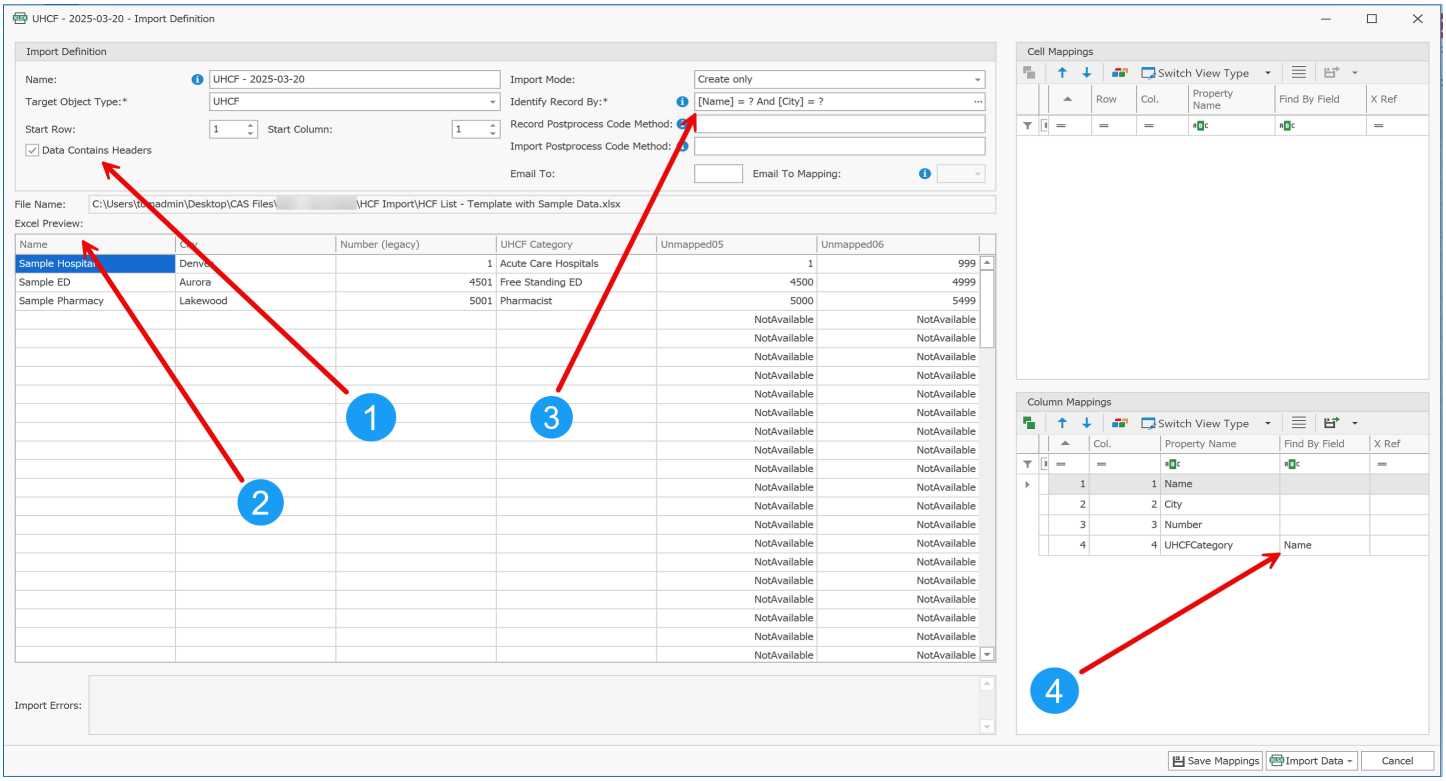
You can select an existing template if a definition has already been defined for this import. Alternatively, choose New Definition to build all the details.



Defining the Import Fields

In this section, we will define a few important areas, as shown in the following diagram. The following items should be completed for a successful import:

1. Define the Column Mapping
2. Define the "Identify Record By"
3. Define the Required Lookup Fields
4. Disable Data Column Headers

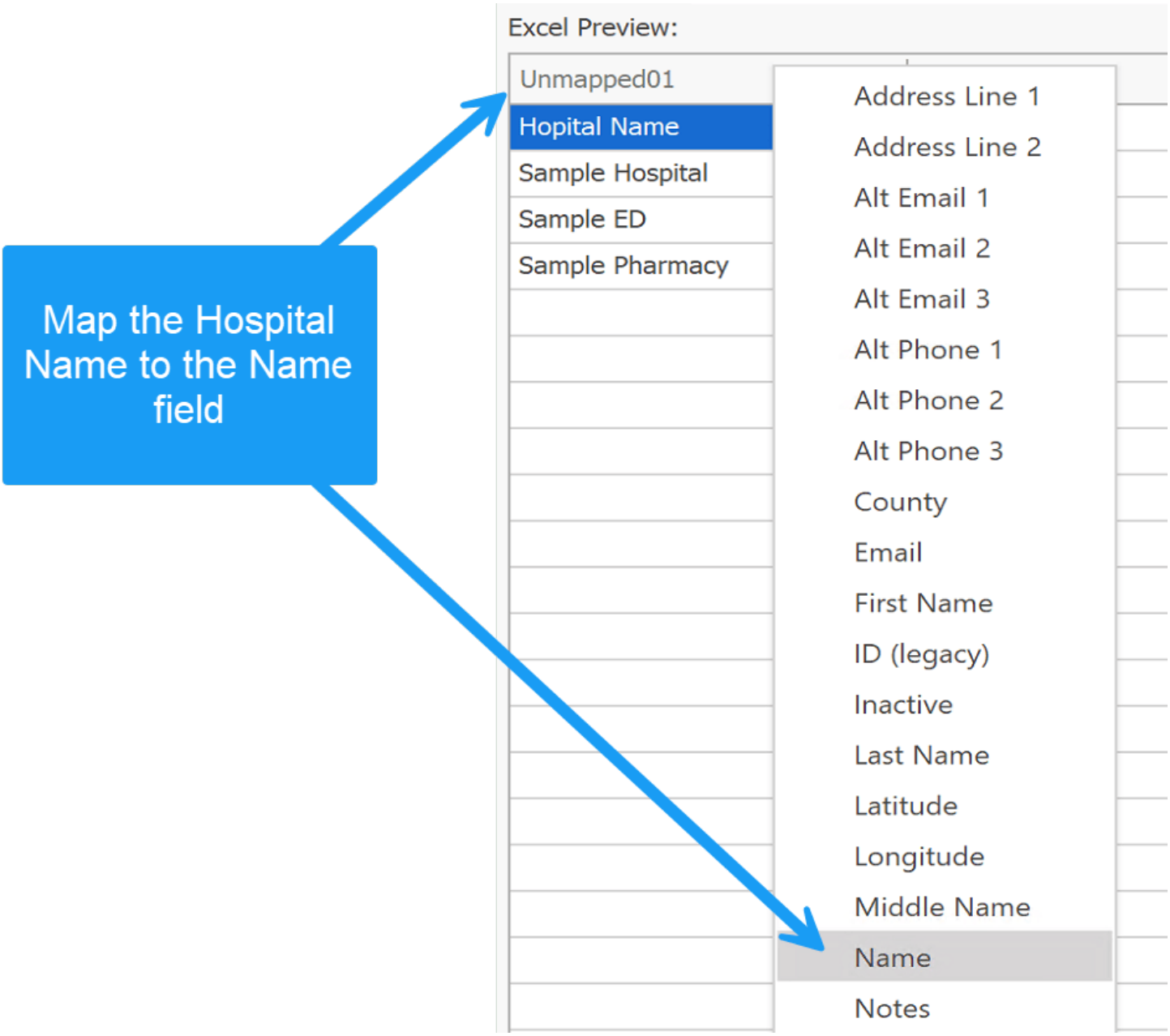


1) Define the Column Mapping

Right-click on an unmapped column, as shown in the image. Then, choose the appropriate column in the toxiCALL® data fields where the column should be mapped.

This example shows mapping the Hospital Name to the Name field.

Continue this for each matching column. Map to City, Number, and UHCF Category for this example.



2) Define the "Identify Record By"

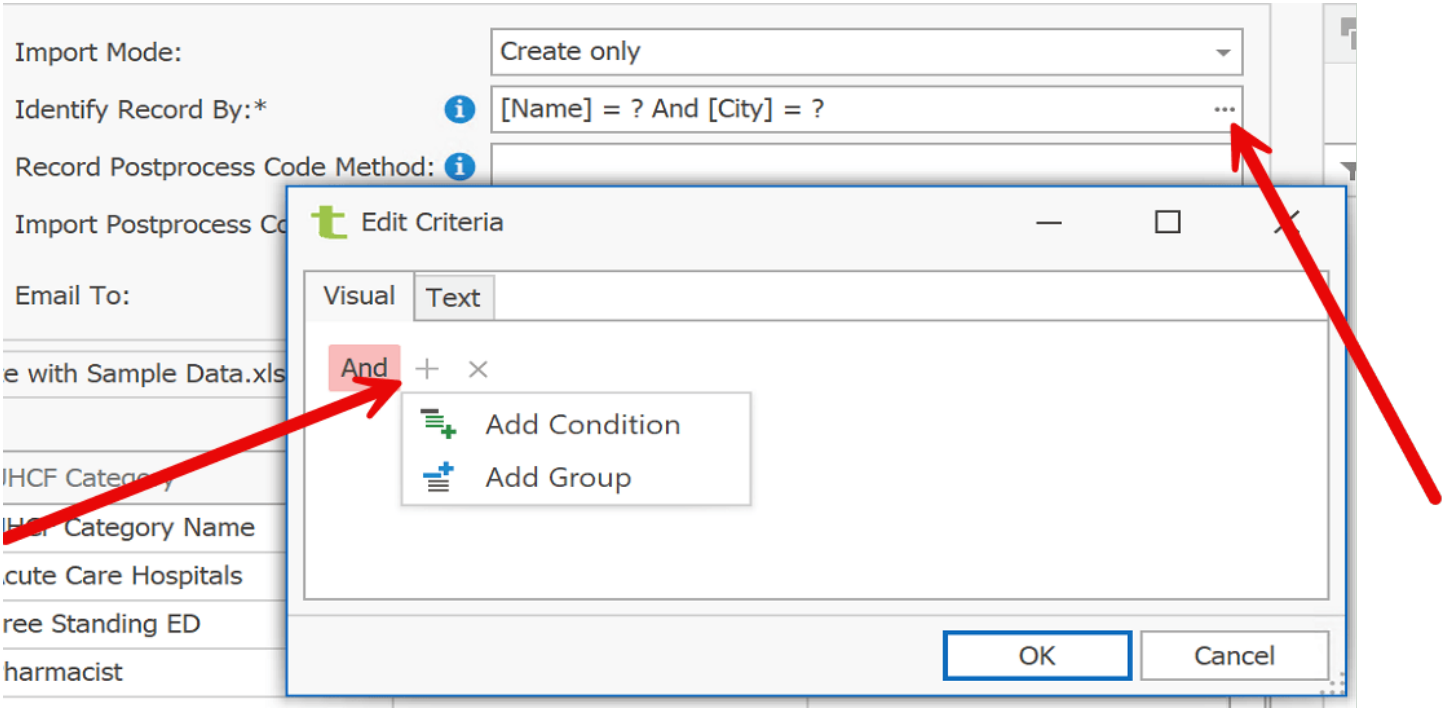
Add Additional Data

You are welcome to add more data fields to the HCF Template spreadsheet and map them using the steps shown below. If you have the information, feel free to include addresses, phone numbers, etc.

The Import module's flexibility is designed to work with different data sets, even Free Areas, if you wish to import a variety of data for use within toxiCALL®.

Next, Select the fields that will be used to identify each HCF data Row. For this example, we will use Name and City.

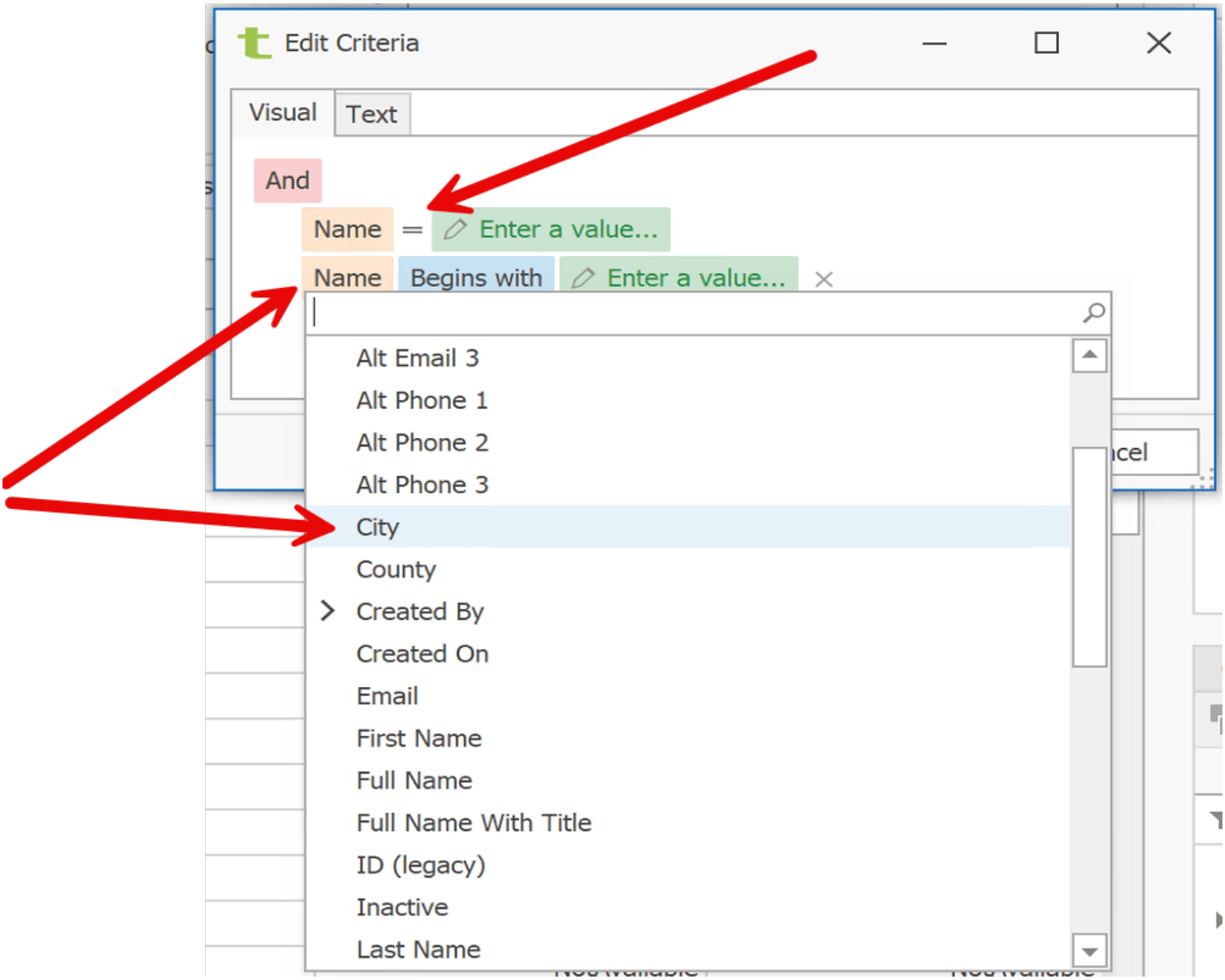
Press the three dots to start the builder. Next, press the + icon to add a new condition.



Select the Name field, then change the condition from "Begins with" to "=."

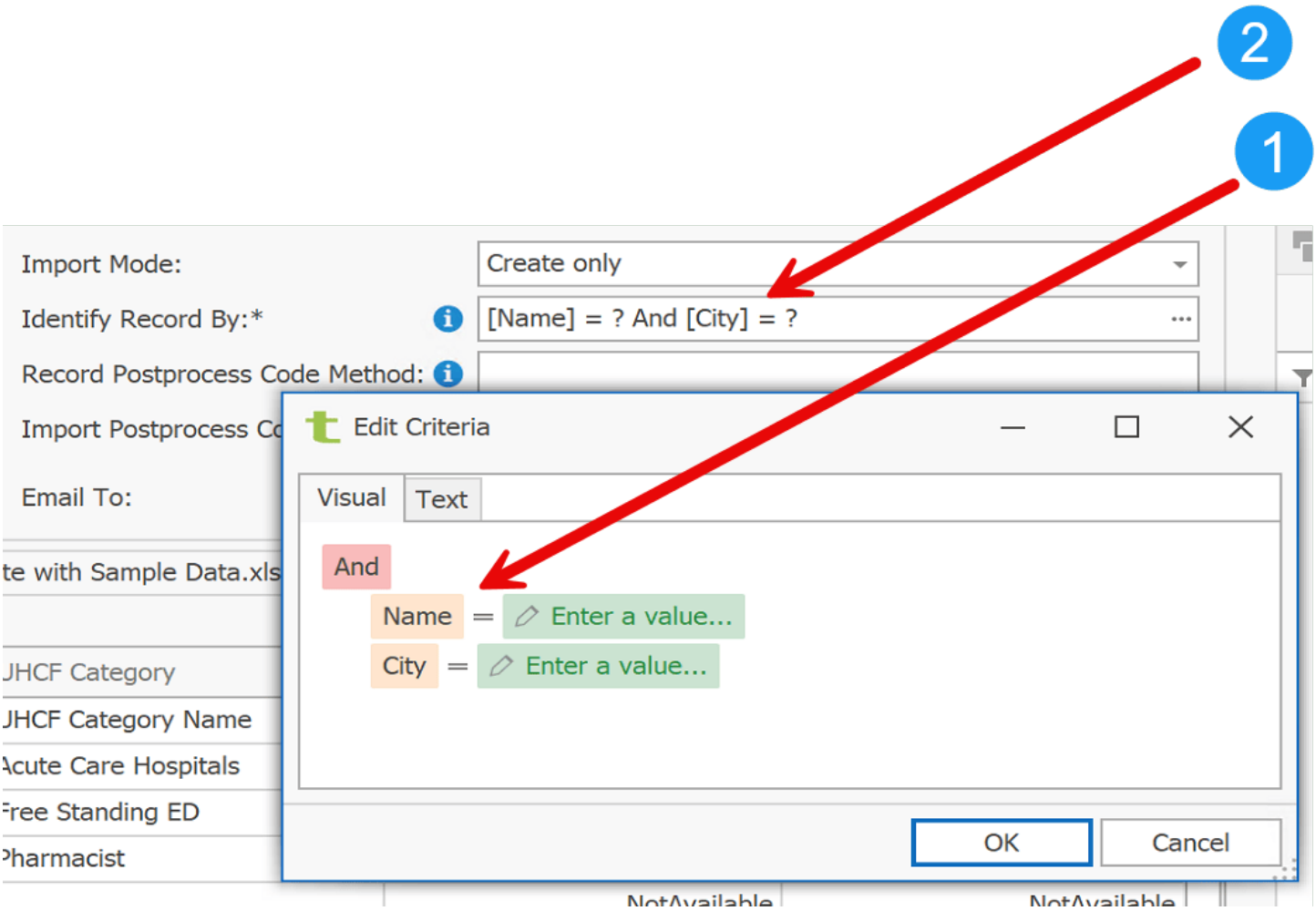
Add a second condition, then choose City, as shown in the image. Also, change the condition to equals.

Be sure to leave the "Enter a value" sections as empty.



1. The final result should look like the following image. Press OK to complete the selection.

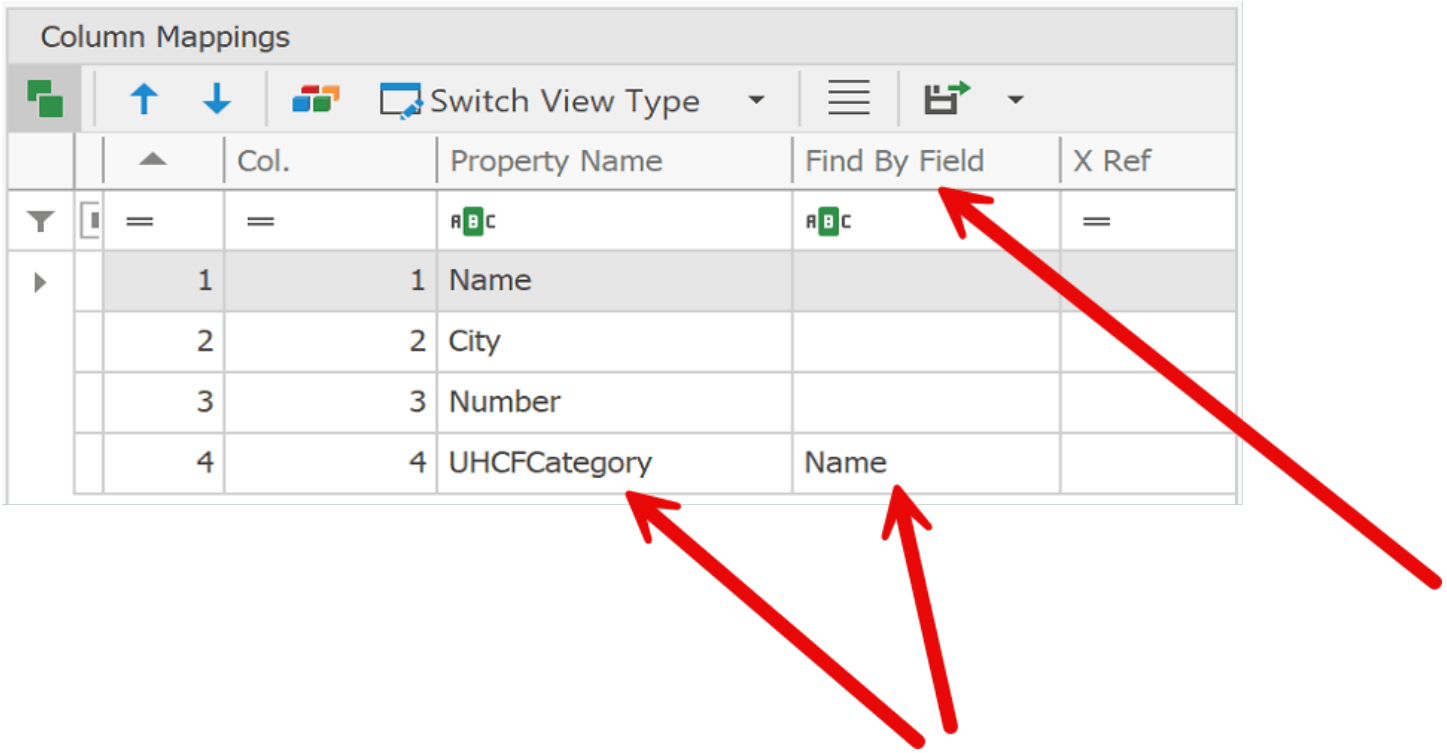
2. Notice how the Indentify Record By name shows the two parameters.



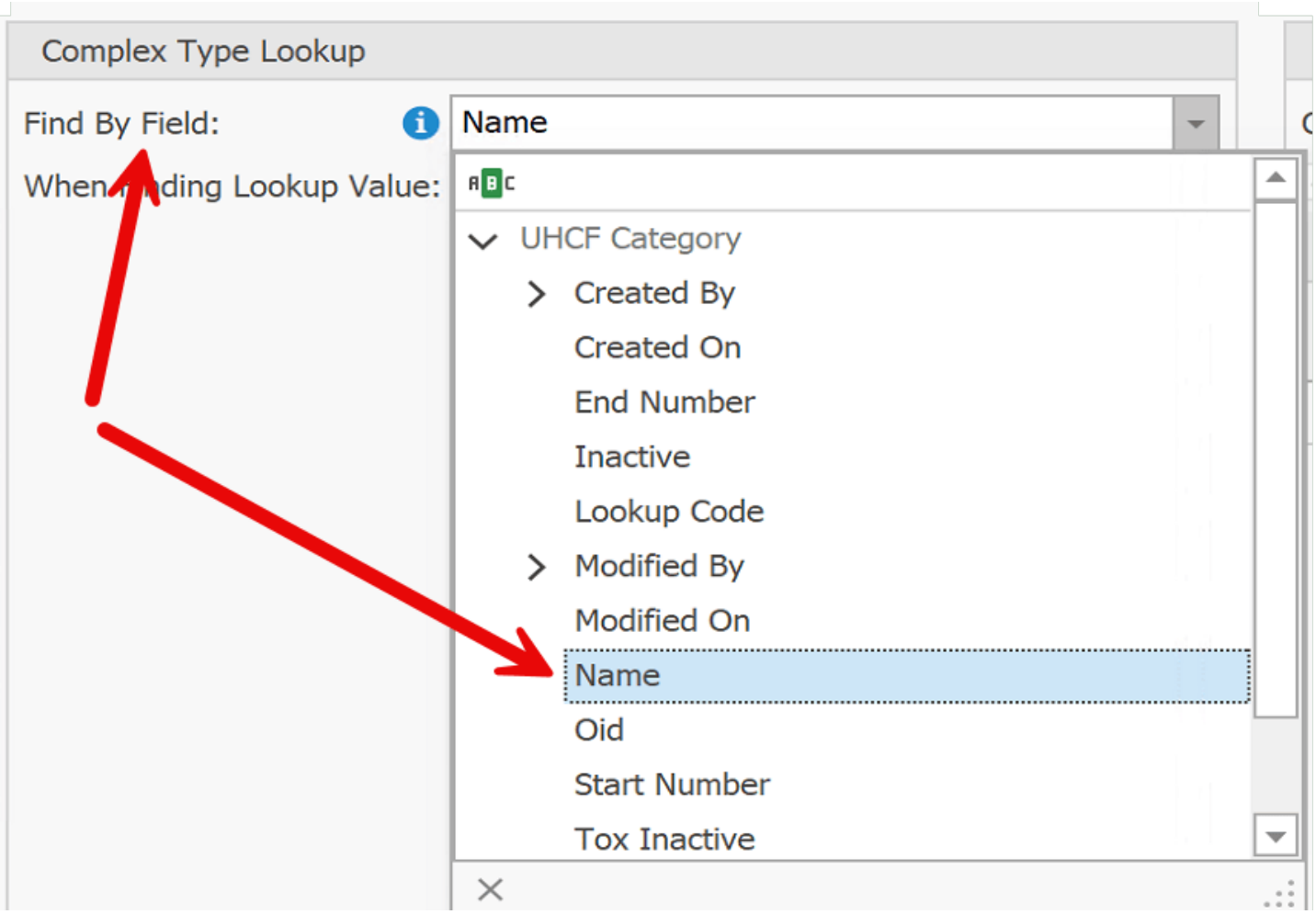
3) Define the Required Lookup Fields

The next step is to adjust the column mapping for the UHCF Category Name. This is important because Category is a lookup item from an existing table within toxiCALL®.

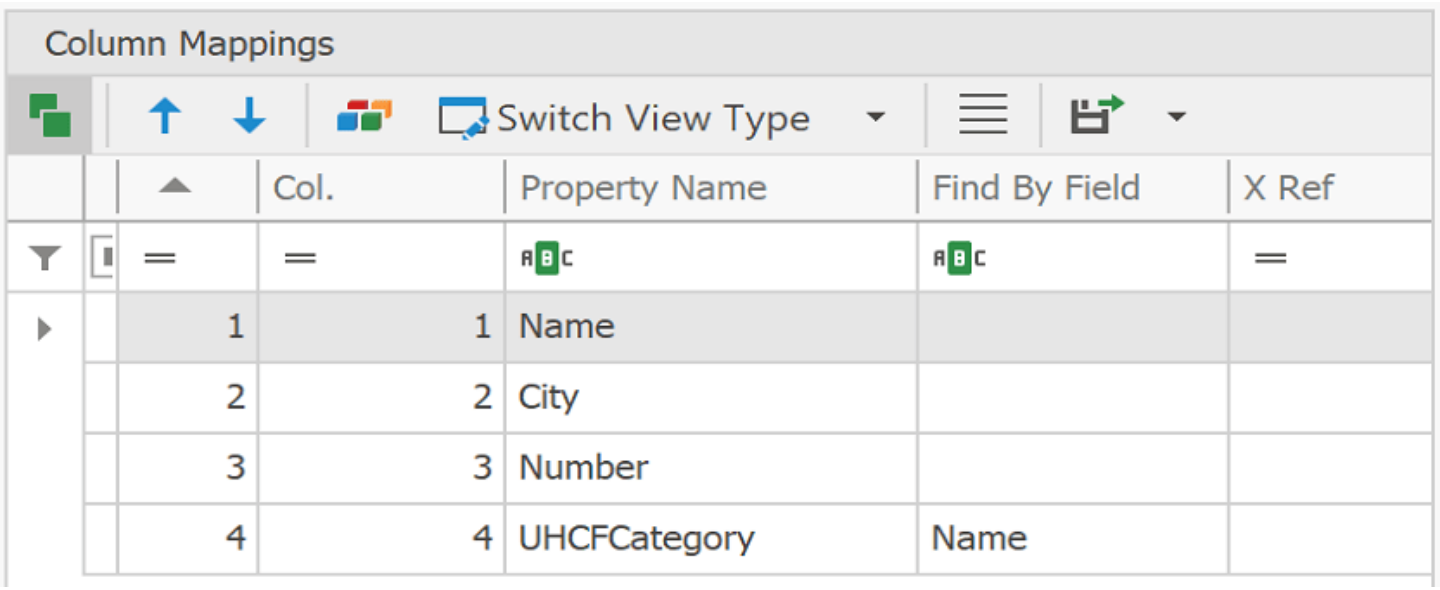
Click the three dots or double-click the Find By Field column in the UHCFCategory row. Notice that the example shown is already populated with "Name." Yours will be empty before starting.



Select the Name column in the UHCF Category section in the popup window or dropdown. Then Click OK if you are in the popup window.



Confirm your column mappings match the following image.

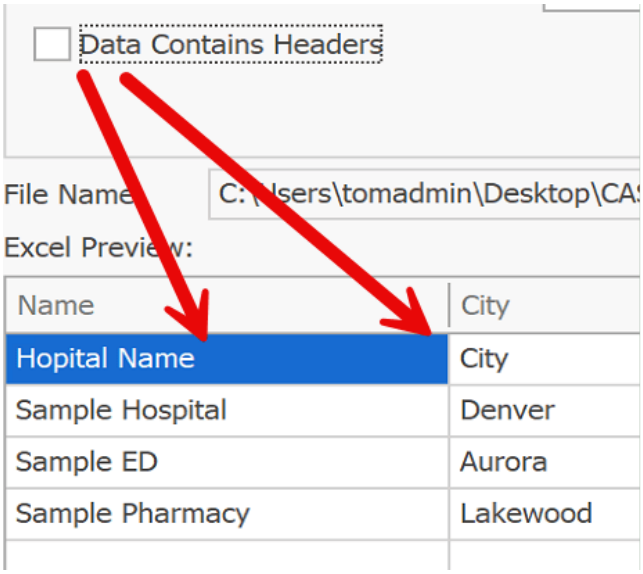


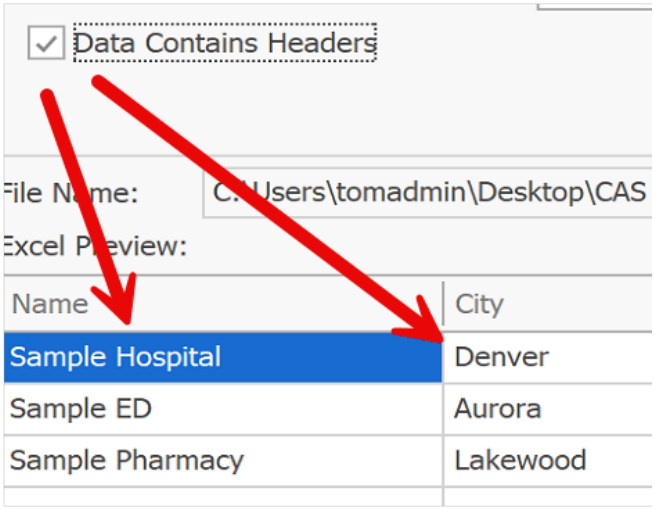
	Col.	Property Name	Find By Field	X Ref
1	1	Name		
2	2	City		
3	3	Number		
4	4	UHCFCategory	Name	

4) Disable Data Column Headers

Notice when the checkbox is not selected, the Excel Column Headers are part of the imported data.

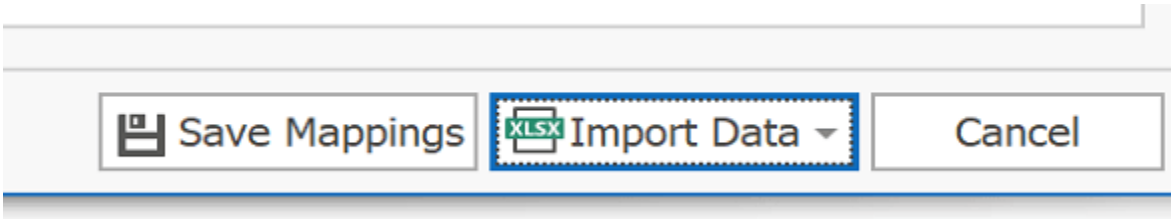
Select the checkbox to remove the column headers before importing your data.





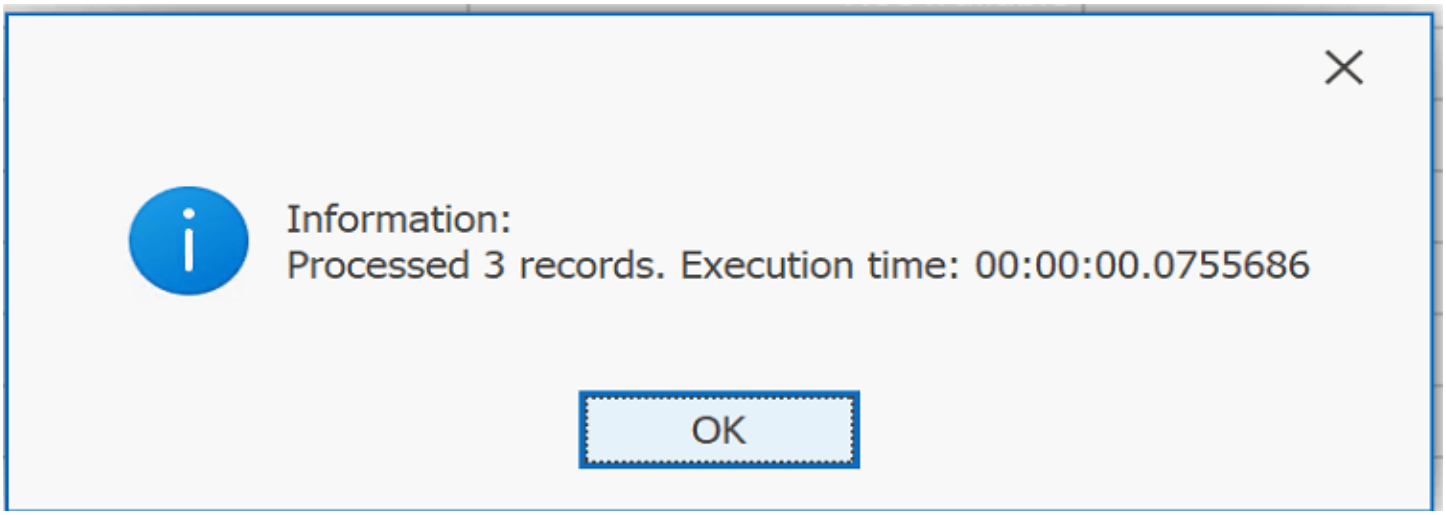
Perform the HCF Import

Once the Import setup is complete, you can import the data. This may require two clicks on the Import Data button.

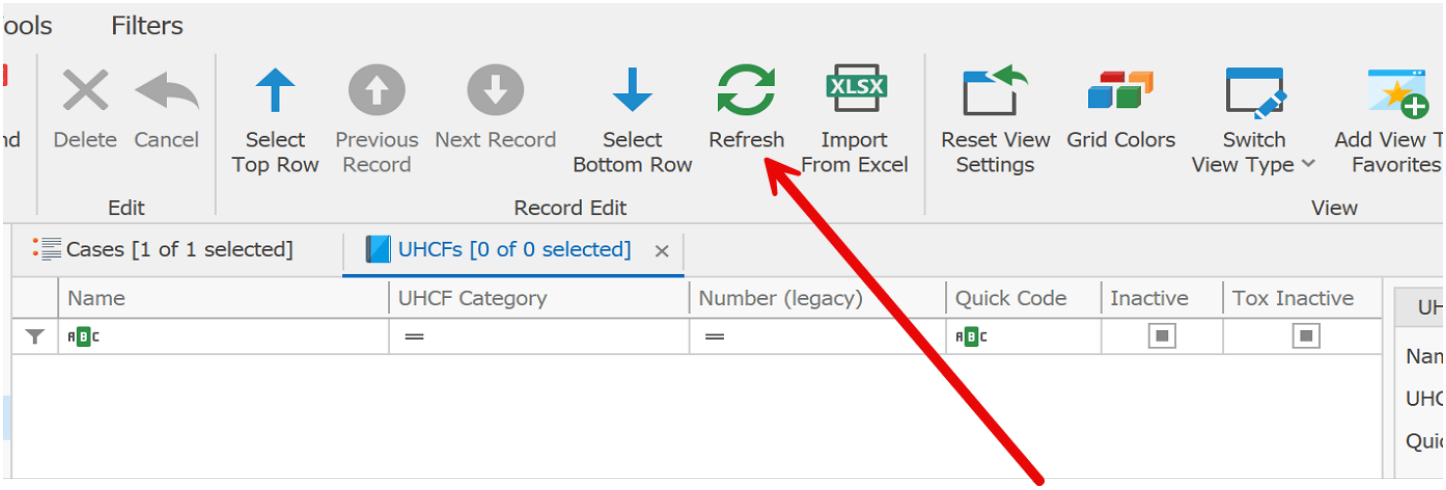


After completing the import, you will receive a message indicating success or errors.

If errors are encountered, they will be displayed in the Import Errors box.

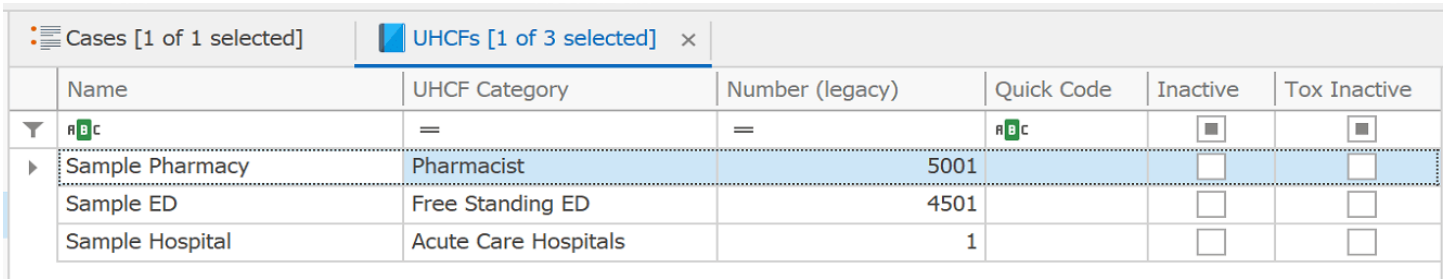


When viewing the HCF List again, hit the refresh button to see the imported Healthcare Facilities.



Success!

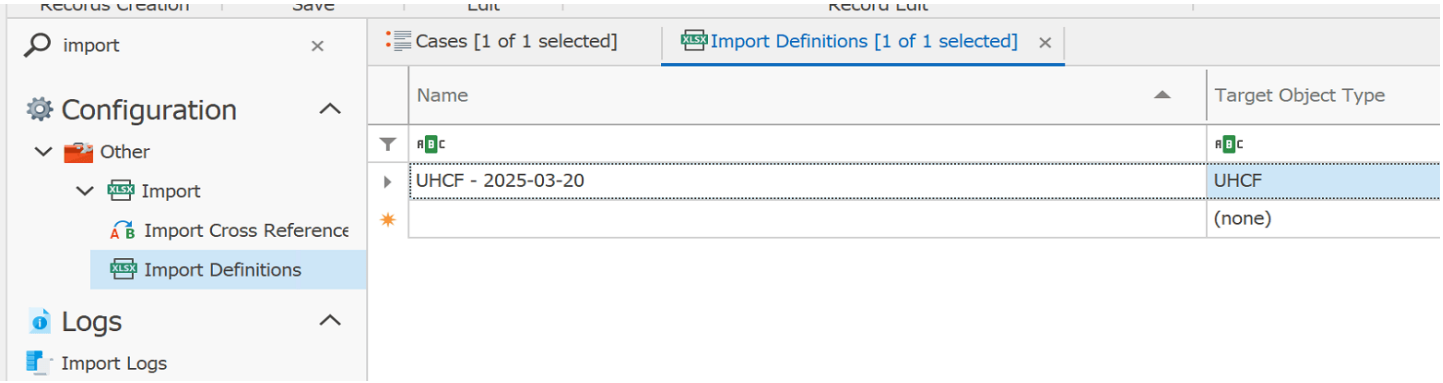
You should now see your imported data.



How to Import a Definition

The definition file should have a "casbml" extension. For the HCF example, you can download the import definition by clicking here.

Next, navigate to the Import Definitions by navigating to Configuration-->Other-->Import-->Import Definitions, as shown in the following image.

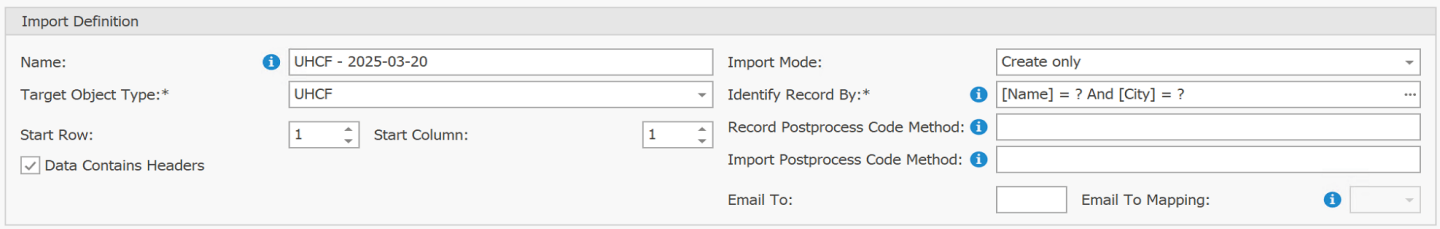


Now select File-->Import Records, then select the definition file.

After the definition file has been loaded, refresh the Import Definitions List and confirm the new definition has been loaded.

Import definitions can be shared by the CAS team or even be shared between toxiCALL® centers!

Other Import Options



The import tool has several other configuration options outlined in this section.

Name

When creating a new definition, the name will be automatically populated. You can change this name to anything more suitable to your liking.

The name will be helpful for future imports and managing the import templates in the Template List.

Target Object Type

This dropdown specifies the object to which the data will be imported. toxiCALL® automatically specifies the current object where your data will be imported.

Start Row/Column

Here, you can change where your data starts within your spreadsheet. Changing the numbers will automatically change the data displayed in the Excel Preview section.

Data Contains Headers

This checkbox specifies if your Excel data has a header row. This would be a descriptive name showing the data contained in each column.

Selecting this checkbox will remove the first row from being imported as data.

Import Mode

Choose an import mode of Create Only, Update Only, or Create and Update.

This will allow you to identify how you want existing data handled when performing an import.

Identify Record By

As demonstrated in the HCF example above, the columns specifying the uniqueness of each row are identified. This can often be a unique value or a combination pair like Name and City, as is used in the HCF example above.

When building the criteria, the question marks (?) should remain in the criteria as these will be replaced with data during the import.

Future: Record Postprocess Code Method

This optional parameter defines a method in code that is invoked after processing each record. The static method requires the following parameters: Sessions session, object recordToImport.

Sample value: MySolution.MyProject.SomeClass.HelperMethod

Future: Import Postprocess Code Method

This optional parameter defines a method in code that is invoked after the entire import process is complete. The static method requires the following parameters: Sessions session.

Sample value: MySolution.MyProject.SomeClass.HelperMethod

Email To (TODO)

Specify an email address for notifications when the import is complete.

Please note an email address must be configured within toxiCALL®.

Email To Mapping

This field is populated by right-clicking on a cell in the Excel Preview section.

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