IMPORTING FIELDS FROM AN EXCEL SPREADSHEET

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It may be more convenient to collect data in an Excel spreadsheet rather than creating forms and fields directly in Dynasite. If you format the fields in the excel spreadsheet in the following method, it is possible to import the fields directly into the system.

First create the new form in the system.

Administration

Application Administration

• Form Administration

- O Create a new form
- O Generate Form Changes
- O Form Import
- O Field Import Imports a list of fields exported from Excel in xml format. Must use field names from FormField class.
- O <u>View Field List</u>
- View List of Rules
- <u>Manage Flows</u> SQL console
- <u>SQL console</u>
 Inplication Lin
- <u>Application Update Job Log</u>
 <u>Reload TCC web application</u>

Keep track of the Table name – you'll use that name for the exported xml file.

Admin: Form Admin: Create Form

Label:	Survivor Quality Survey	Label field can be descriptive - this is displayed at the top of the form.
Table name:	survivorQualitySurvey	Name field should be a short, one word, lower-case name. It must begin with a letter and contain only letters, underscore characters (_), and digits and be limited to 128 characters. It is used internally by the system to create the database table.
Require Reauthentication:	Yes 💿 No	Require Reauthentication: Do you need a username/password field displayed at bottom of form? This will force user to re-authenticate before the form will be processed. Default: Yes.
Require Patient:	Yes 💿 No 🔘	Require Patient: Most forms require a patient. Default: Yes. Only form that does not require a patient is Enrollment.
Enabled:	Yes 💿 No 🔘	Enabled: Is the form enabled? Default: Yes.
Flow:	History	Flow: In which flow does this form belong?
Order in Flow:	4	Order in Flow: Within its flow sequence, where does this form appear? If this is a new form, you need to make sure it's next in sequence.
Form Type:	Basic Form	Form Type - Default is "Basic."
Form Domain:	All Patients	Form Domain - Default is "All Patients."
Maximum Submissions:		Max. Submissions - You may leave this blank. How many times may the form be submitted for each patient? Enter "1" if you want the the form to be submitted only once for a patient.
	Save	

Be sure to select Basic form.

The system will display a form with two fields – table begin and end.

Admin: Form Admin: Edit Items for Survivor Quality Su

Refresh page | Add new field... | Add Shared Field | Reload

Save Field Order | Preview Form

Items on this form

*BEGIN TABLE (0) *1427* (X)				
* END TABLE (1) *1428* / (X)				

Restart the application to render the new form fields. This is very important – do not forget this step!

Now you're ready to export the fields from Excel. Open the spreadsheet. You may have collected the data in a different format:

	A	В	C	D	E	
1	Label	Field Name	Data Type	Section	Enumerations	Comments
2	Where did you report the case?	location_of_case_report	enum	body	Thuthuzela Centre, Police station	
	Where you satisfied with the way you were treated by	level_of_satisfaction			Excellent,Satisfied,Unsure,Dissatisfied	
3	the police? Please choose one:		enum	body		
	How long did you wait before you were transported from	duration_of_wait_for_transport				mnutes or hour
4	the police station to Thuthuzela Centre?		int	body		
5	How did you get to the Thuthuzela Centre?	mode_of_transport_to_tcc	enum	body	Car, minivan, bus, bicycle, walked, other	Currently text, I
	Were you informed about TCC and what to expect when	informed_about_tcc				
6	you arrive there?		yes/no	body		
7	What time did you arrive at Thuthuzela Care Centre?	time_of_arrival	time	body		
8	How soon were you helped?	duration_of_wait_for_help	int	body		
	Did someone receive / welcome you to the Thuthuzela	welcomed_by_staff				
9	Centre?		yes/no	body		
	Who received / welcomed you to the Thuthuzela	person_who_welcomed				
10	Centre?		text	body		

You'll need to re-arrange some of the fields and re-name some of the labels. The fields should be in the order of label, starSchemaName, type, and enumerationList, using those names in the first field. Here's how this list looks after re-arranging the fields:

	A	В	С	D
1	label	starSchemaName	type	enumerationList
2	Where did you report the case?	location_of_case_report	enum	Thuthuzela Centre, Police station
3	Where you satisfied with the way you were treated by the police? Please choose one:	level_of_satisfaction	enum	Excellent,Satisfied,Unsure,Dissatisfied
4	How long did you wait before you were transported from the police station to Thuthuzela Centre?	duration_of_wait_for_transport	int	
5	How did you get to the Thuthuzela Centre?	mode_of_transport_to_tcc	enum	Car, minivan, bus, bicycle, walked, other
6	Were you informed about TCC and what to expect when you arrive there?	informed_about_tcc	yes/no	
7	What time did you arrive at Thuthuzela Care Centre?	time_of_arrival	time	
8	How soon were you helped?	duration_of_wait_for_help	int	
9	Did someone receive / welcome you to the Thuthuzela Centre?	welcomed_by_staff	yes/no	

The names in the first row correspond to field names in the FormField object.

The types roughly correspond to field types in zcore. The field types to use:

- Text text entry box (VARCHAR(255))
- enum produces a dropdown. List the items in the dropdown in the enumerationList, comma-separated.
- Int integer (int)
- float renders a text entry box.(float)
- yes/no a yes/no field (tinyint(4))
- time a time widget (time)
- date a calendar widget (date)
- checkbox a checkbox (tinyint(1))
- textarea a large text field for example, for a Comments field. (Long Varchar)
- info descriptive text display only, no data entry
- section header header of a section of fields, descriptive text display only, no data entry

Once the formatting is complete, go to Add-ins -> XML Tools -> Convert a Range to an XML List. If this does not appear in your copy of excel, see the <u>MS Knowledge base article HA10263509</u> for instructions on how to install the XML Tools.

0						TCC Tool fields.>			
	Home Insert Page Layout Formulas	Data	a Review	View	Developer	Add-Ins			
	XML Tools ~								
	Convert a Range to an XML List								
	Create XSD files for the XML <u>S</u> chema at the active cell								
L	Refresh all the XML Maps in the active Workbook								
	Display the active cell's XML properties	rmed/told about your rights when you arrived at TCC							
	A		B			;			
1	label	s	tarSchemaN	ame	type	enume			
2	Where did you report the case?	l	location_of_case_report enum			Thuthuz			
	Where you satisfied with the way you were treated b	y l	evel_of_satisfa	iction		Exceller			
3	the police? Please choose one:				enum	ed			

Complete the following:

- Select the range of fields you'd like to convert,
- select Yes, first row contains column names,
- Check Use Advanced Options
 - Enter "list" for root
 - Enter "org.cidrz.webapp.dynasite.valueobject.FormField" for row



After pressing OK, Excel will render the table in a new format.

		А	В	С	D	E	Γ
	1	label 🔽	starSchemaName 💽	type 🔽	enumerationList	Section	с
	2	Where did you report the case?	location_of_case_report	enum	Thuthuzela Centre, Police station	body	
	3	Where you satisfied with the way you were treated by the police? Please choose one:	level_of_satisfaction	enum	Excellent,Satisfied,Unsure,Dissatisfi ed	body	
	4	How long did you wait before you were transported from the police station to Thuthuzela Centre?	duration_of_wait_for_transport	int		body	n
-	5	How did you get to the Thuthuzela Centre?	mode_of_transport_to_tcc	enum	Car, minivan, bus, bicycle, walked, other	body	С
	6	Were you informed about TCC and what to expect when you arrive there?	informed_about_tcc	yes/no		body	
	7	What time did you arrive at Thuthuzela Care Centre?	time_of_arrival	time		body	

Now go to the Developer Toolbar and click Export:



Browse to the zcore-app \webapps\archive\forms\import\new and save the xml file, using the table name mentioned earlier. It is important to get this filename right or the import will not work.

Open this file in a text editor and do a search and replace of the following:

org_cidrz_webapp_dynasite_valueobject_FormField

with

org.cidrz.webapp.dynasite.valueobject.FormField

Save the file.

Back to the web app, Login (you remembered to restart the app, correct?), go to the Admin page and click "Field Import."

Administration

Application Administration



Click the link to the new fiel you just created.

Field Import

Please place the forms you wish to import in C:\tcc\webapps\archive\forms\import\new\

Here is a list of the forms available for Field import into the system. Click on the desired name to import.

File name survivorQualitySurvey.xml

If all goes well, you'll receive a confirmation message that tells you that the file has been moved to the completed directory. Now proceed to the Admin -> Form Admin page to select the form and edit the fields. Be sure to drag the "End Table" field to the end of the list and click "Save Field Order" before previewing the form.

The import may fail; don't fret. It's probably a syntax error in one of the fields. Open the xml file and fix the error. Remove any of the fields that were successfully important and try again.