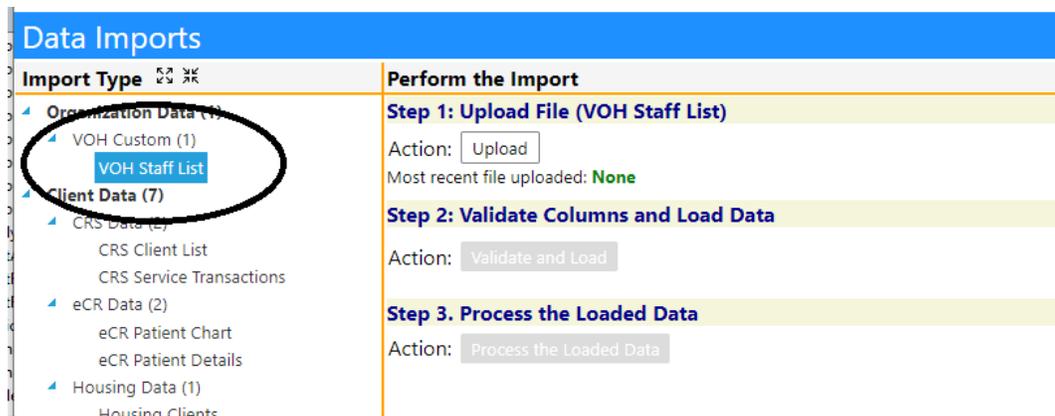
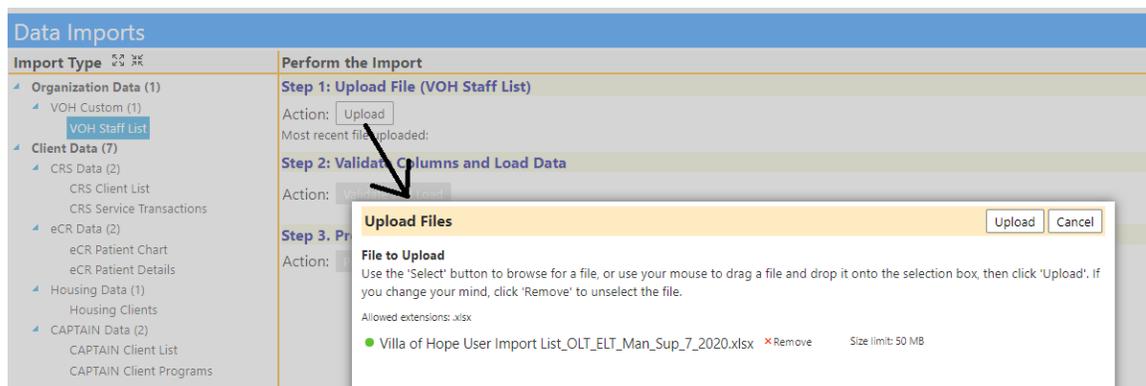


The following process can be followed to import staff lists.

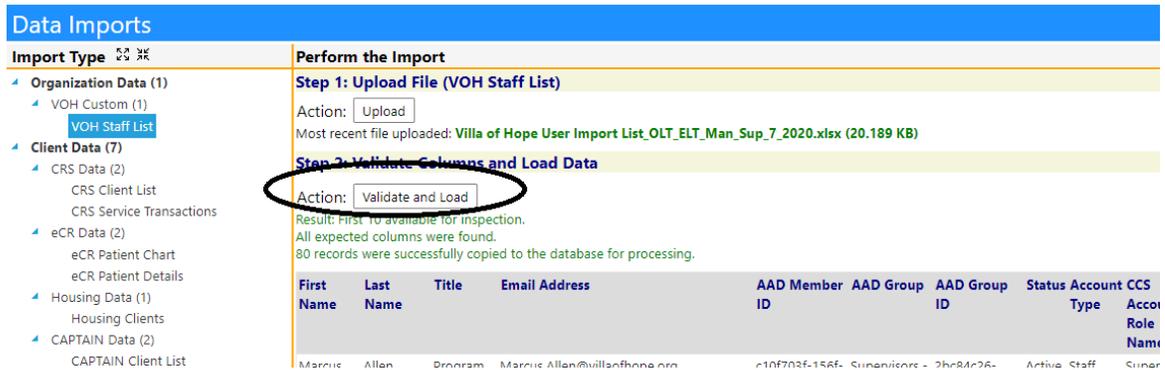
1. Go to the menu system and invoke the Perform Import process. (Performance > Data > Data Imports)
2. Select the list that you want to import (as new lists are added, these will be added to the Data Imports Library – System > Data Management > Import Library. These files must be properly mapped so the import will work – once they are imported, any changes to the file will require a review of all mapping as well as possible system changes.)
3. In this example, Select VOH Staff as the list to import.



4. Click the Upload file button.
5. Select your file and then click 'Upload'.
6. Note: The import file must be the exact same format of what was provided previously. This copies your file to the server. So, it may take a bit of time to complete the import, depending on the file size.



- After the upload is completed, the “Validate and Load” button enables.
- Click the “Validate and Load” button to read the Excel file into a temporary database table where it can further be processed.



**Data Imports**

**Import Type**  

- Organization Data (1)
  - VOH Custom (1)
    - VOH Staff List**
- Client Data (7)
  - CRS Data (2)
    - CRS Client List
    - CRS Service Transactions
  - eCR Data (2)
    - eCR Patient Chart
    - eCR Patient Details
  - Housing Data (1)
    - Housing Clients
  - CAPTAIN Data (2)
    - CAPTAIN Client List

**Perform the Import**

**Step 1: Upload File (VOH Staff List)**

Action:

Most recent file uploaded: **Villa of Hope User Import List.OLT.ELT.Man.Sup.7.2020.xlsx (20.189 KB)**

**Step 2: Validate Columns and Load Data**

Action:

Result: First 10 available for inspection.  
All expected columns were found.  
80 records were successfully copied to the database for processing.

First Name	Last Name	Title	Email Address	AAD Member ID	AAD Group	AAD Group ID	Status	Account Type	CCS Role Name
Marcie	Allen	Program	Marcie.Allen@villahope.com	r10f703f-156f-	Supervisors - 2hc8Ac26-		Active	Staff	Supar

While this happens, the system checks for column names and things like that – so if there is a problem – you will get an error message. If successful as below, you will be given a preview of the first 10 rows so that you can confirm it looks reasonable.

This is an example of an error message indicating a structural problem with the file:



Most recent file uploaded: **Villa of Hope User Import List.OLT.ELT.Man.Sup.7.2020.xlsx (20.189 KB)**

**Step 2: Validate Columns and Load Data**

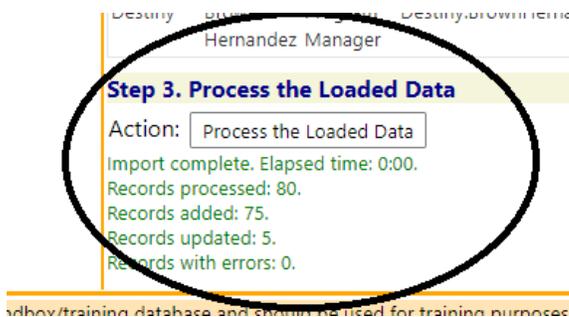
Action:

Result: First 10 available for inspection.  
Expected columns were not found. The following columns are missing: Program, Year, App#, Emp ID, Client ID, Housing, Family Type, Income Types, Funding Source, Reverify Date, Wait List, # of HH, Com.Income(\$), # in P

First Name	Last Name	Title	Email Address	AAD Member ID	AAD Group
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- Click “Process the Loaded Data” to transfer the data from the temporary table into the database, with the various data checks, duplicates, etc.

The numbers shown will give you a feel for the number of records processed, added, updated, and those with errors.



**Step 3: Process the Loaded Data**

Action:

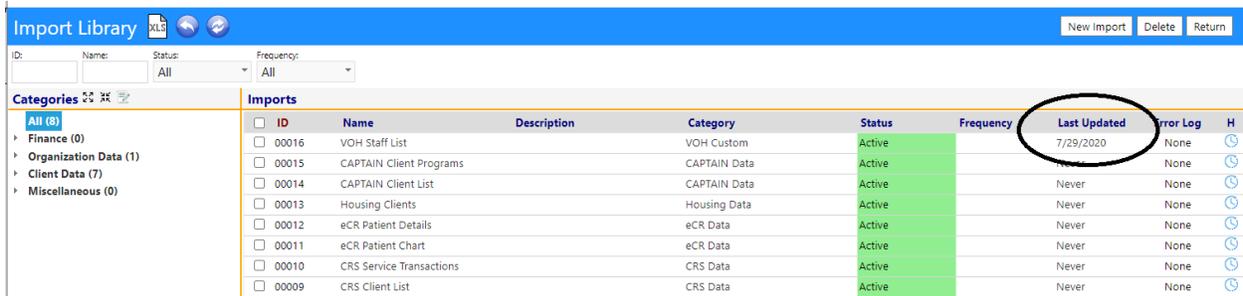
Import complete. Elapsed time: 0:00.  
Records processed: 80.  
Records added: 75.  
Records updated: 5.  
Records with errors: 0.

vhov/training database and should be used for training purposes

If you get any data errors (an example might be a DOB that was more than 120 years ago) you get a button that says how many errors that you can click to see the specific items. With this file,

the only things we might see are blank first and last names – and I just ignore those – so for this file there won't be any data errors. But if there were – you'd get a message.

10. Go the menu item “import Library” (System > Data Management > Import Library ).
11. View the import setup and the date and time of your most recent import.
12. Click on the link to see any errors (you can always go back and see them).



Import Library										
ID:	Name:	Status:	Frequency:							
		All	All							
Categories		Imports								
All (8)		ID	Name	Description	Category	Status	Frequency	Last Updated	Error Log	H
> Finance (0)		<input type="checkbox"/>	00016	VOH Staff List	VOH Custom	Active		7/29/2020	None	
> Organization Data (1)		<input type="checkbox"/>	00015	CAPTAIN Client Programs	CAPTAIN Data	Active			None	
> Client Data (7)		<input type="checkbox"/>	00014	CAPTAIN Client List	CAPTAIN Data	Active		Never	None	
> Miscellaneous (0)		<input type="checkbox"/>	00013	Housing Clients	Housing Data	Active		Never	None	
		<input type="checkbox"/>	00012	eCR Patient Details	eCR Data	Active		Never	None	
		<input type="checkbox"/>	00011	eCR Patient Chart	eCR Data	Active		Never	None	
		<input type="checkbox"/>	00010	CRS Service Transactions	CRS Data	Active		Never	None	
		<input type="checkbox"/>	00009	CRS Client List	CRS Data	Active		Never	None	

*Note: One thing to be aware of – since in many staff lists we just have first name and last name of the person and not SSN or DOB, there is risk of an incorrect update if two or more people have the exact same first name and last name. If it is found that is the case, users might want to consider adding last 4 of SSN or a middle name so make it more certain that each person has a unique name. The AAD member ID could potentially be used as an additional check, but that could also potentially change and could lead to duplicates. In light of that, the SSN or DOB would be best. To incorporate those, a slight change would need to be made by the developers to the import document. It is an easy change, but still needs to be done before any imports are completed.*