



D A M S T R A

Import Worker Medical
Records (bulk method)

Safety

[DISCLAIMER]

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Import Medical Data Introduction

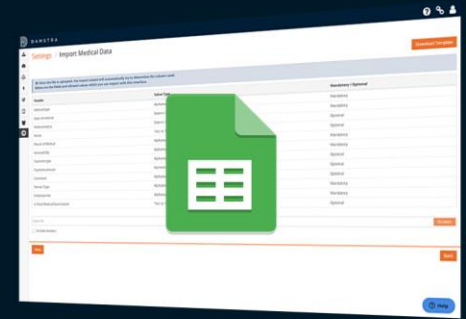
Damstra Safety provides the ability to store details of Medical Examinations for individual workers to keep track of the health of your people during their time with your Organisation.

Medical records may be added manually record-by-record, or imported in bulk.

This guide explains the bulk import method. Help with the manual method is available separately in the support portal.

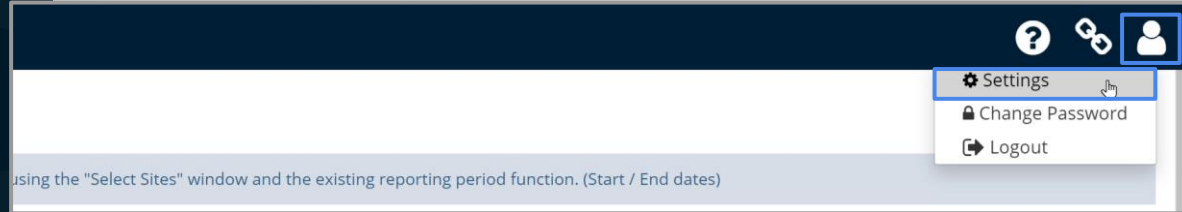


Manual Method



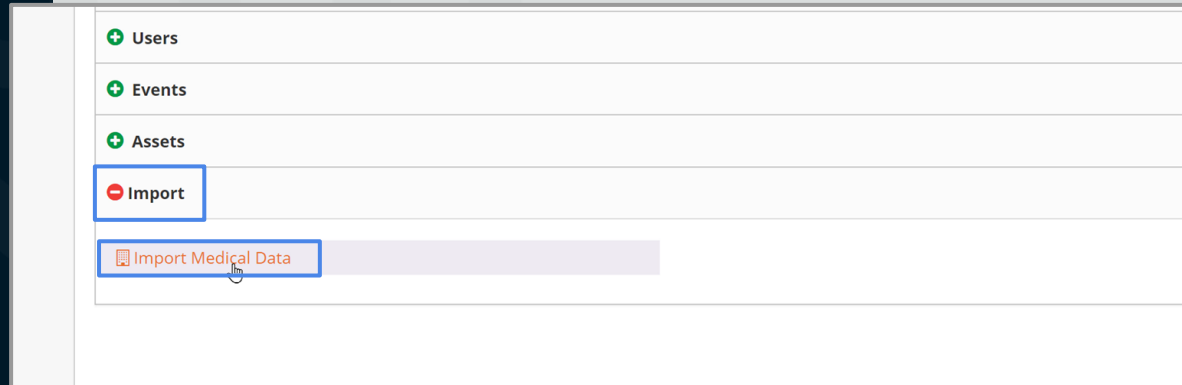
Bulk Import Method

Import Medical Data Settings



Begin in Settings, which can be found under the profile icon toward the top of the screen.

Click to expand the *'Import'* section, then **select** *'Import Medical Data'*.



Import Medical Data

Create CSV File

Data is imported via a CSV file. You may either create your own file from scratch, or begin the process by downloading a template via the button to the top-right of the screen.

If creating from scratch, it is recommended to include the header names in row 1 of your file. This will help your Safety system correctly match the values in your file with the fields in the database.

Settings / Import Medical Data

Once the file is uploaded, the import wizard will automatically try to determine the column used. Below are the fields and allowed values which you can import with this interface.

Header	Value Type	Mandatory / Optional
Medical type	Alphanumeric	Mandatory
Date of medical	Date in 'dd-mm-yyyy' or 'dd/mm/yyyy'	Mandatory
Medical expiry		
Active		
Result of Medical		
Assessed By		
Payment type		
Payment amount		
Comment		
Person Type		
Employee No.		
Is Final Medical Examination		

Select file Include headers

Next

Download Template

medical_data_import.csv

Import Medical Data

Create CSV File cont.

Add your data to the CSV file in line with the instructions on screen.

Be sure to include data for at least the mandatory fields for each record,

and **note** that for the fields '*Medical Type*' and '*Result of Medical*', you must enter existing values that your Organisation has defined for these fields. Supplying any unknown or misspelt entries in these fields will cause errors within the import.

Settings / Import Medical Data

Once the file is uploaded, the import wizard will automatically try to determine the column used. Below are the fields and allowed values which you can import with this interface.

Header	Value Type	Mandatory / Optional
Medical type	Alphanumeric	Mandatory
Date of medical	Date in 'dd-mm-yyyy' or 'dd/mm/yyyy'	Mandatory
Medical expiry	Date in 'dd-mm-yyyy' or 'dd/mm/yyyy'	Optional
Active	'Yes' or 'No'	Optional
Result of Medical	Alphanumeric	Mandatory
Assessed By	Alphanumeric	Mandatory
Payment type	Alphanumeric	Optional
Payment amount	Numeric	Optional
Comment	Alphanumeric	Optional
Person Type	Alphabetic	Mandatory
Employee No.	Alphanumeric	Mandatory
Is Final Medical Examination	'Yes' or 'No'	Optional

Select file Browse

Include headers

Next Back Help

Import Medical Data

CSV File: Field Match

Damstra Safety will then analyse the CSV file and display the results of the attempted match.

If there are any mismatches, **correct** this via the pick-lists, then **click** 'Save'.

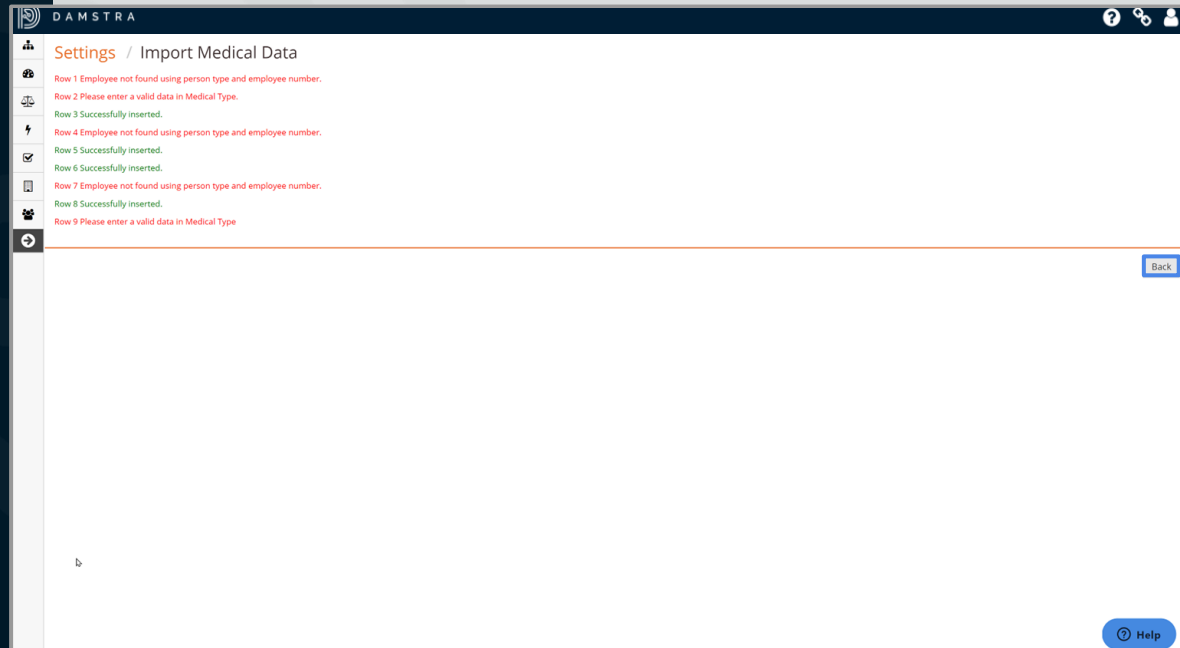
Field	Spreadsheet Column	Field Type	Mandatory / Optional
Medical type	Medical type	Alphanumeric	Mandatory
Date of medical	Date of medical	Date in 'dd-mm-yyyy' or 'dd/mm/yyyy'	Mandatory
Medical expiry	Medical expiry	Date in 'dd-mm-yyyy' or 'dd/mm/yyyy'	Optional
Active	Active	'Yes' or 'No'	Optional
Result of Medical	Result of Medical	Alphanumeric	Mandatory
Assessed By	Assessed By	Alphanumeric	Mandatory
Payment type	Payment type	Alphanumeric	Optional
Payment amount	Payment amount	Numeric	Optional
Comment	comment	Alphanumeric	Optional
Person Type	Person Type	Alphabetic	Mandatory
Employee No.	Employee No	Alphanumeric	Mandatory
Is Final Medical Examination	Is Final	'Yes' or 'No'	Optional

Save Cancel Help

Import Medical Data CSV File: Errors

Your Safety system will then display the results of the import. If there are any errors, fix these in the CSV file and resubmit by **clicking** 'back' and re-uploading the file.

Note that the successfully-imported rows should be removed from the file to avoid any duplicated data.



The screenshot shows the DAMSTRA web interface for 'Settings / Import Medical Data'. The interface displays a list of 9 rows with the following messages:

- Row 1 Employee not found using person type and employee number.
- Row 2 Please enter a valid data in Medical Type.
- Row 3 Successfully inserted.
- Row 4 Employee not found using person type and employee number.
- Row 5 Successfully inserted.
- Row 6 Successfully inserted.
- Row 7 Employee not found using person type and employee number.
- Row 8 Successfully inserted.
- Row 9 Please enter a valid data in Medical Type

A 'Back' button is visible in the top right corner of the main content area, and a 'Help' button is in the bottom right corner of the interface.

Import Medical Data

Import Complete

Once all data has been successfully imported, it will be immediately visible within the 'Medicals' tab of the Workers involved.

