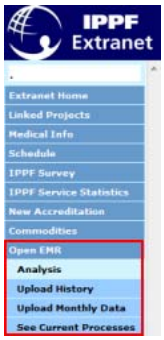
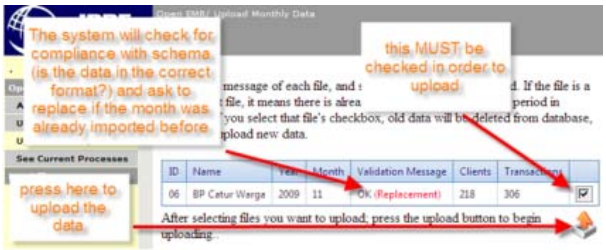
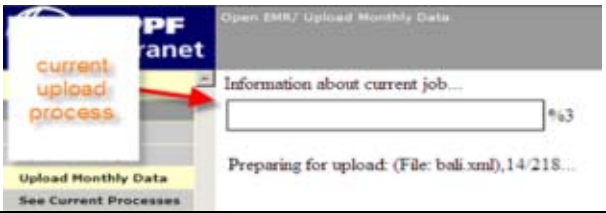
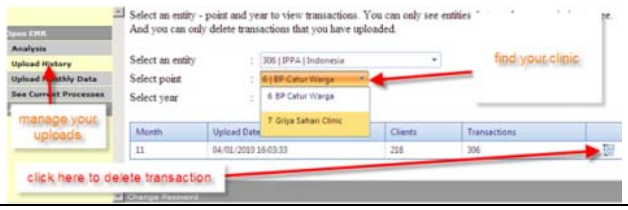
PROCESS DESCRIPTION – VERSION 4.0 (JUNE 2010)

ROLES: EVALUATORS / PROGR MANAGERS / SENIOR STAFF	**PROCESS 5.2.0:** IMPORTING AN OpenEMR FILE INTO eIMS

#	Step	Observations	Menu options or screen information
0	**Preliminary steps:** You first need to generate an XML file with monthly service, product, demographic and finance data using OpenEMR export function [See previous Process Guideline 5.1.0] In addition, you need to login IPPF extranet at: http://www.ippf.net, and have appropriate access rights to EMR menu in eIMS (i.e. you need the EMR access group enabled in your eIMS user profile). **Note:** It is important to ensure that each clinic defined in OpenEMR has a unique facility ID [in Administration > Facilities > Facility Code], as this is related to the Service Delivery Point (SDP) in eIMS.		 **Note**: If you do not see the OpenEMR menu options in your eIMS Main Menu, is because you do not have appropriate access rights. Ask your system administrator about this.
1	**Export to global database via the Internet** 1. Click on "Upload monthly data" in the main menu 2. Choose the entity you want to upload data to (depending on access rights) 3. Press "Select" and locate the export file from openEMR (eg. Bali1209.xml) to be imported 4. Optionally you can add several files (not recommended) 5. Press the upload icon to verify the dataset against IPPF's import schema	Chose Entity Select file to be imported **Note:** f you upload a file with a new SDP ID (the facility ID in openEMR), the global DB will add a new clinic. A warning message will be displayed.	
2	**Verify status of each file** eIMS import function will provide you with a full description of each file to be imported in terms of: **ID:** Unique ID number of import file **Name:** Clinic name **Year:** Import year **Month:** Import month **Validation Msg:** Compliance with XML schema (if file was imported before will issue a Replace msg) **Clients:** Number of clients for import **Transactions:** Number of transactions for import	Please read message of each file, and select files you want to upload. If the file is a replacement file, it means there is already an uploaded data for that period in database. If you select that file's checkbox, old data will be deleted from database, in order to upload new data. 	
3	**Verify status of import process** eIMS will display information about the job being imported.		
4	**Manage your data online** By selecting Upload History in eIMS Main Menu you can manage your imported data online. Select an entity - point and year to view transactions. You can only see entities that you have permission to see. Moreover, you can only delete transactions that you have uploaded.