

Edit Field Mappings

For CAREWare to convert imported data into the correct format and location in the CAREWare database, users need edit the field mappings. The field mappings ensure CAREWare correlates data in one column of the import file with a specific column in the actual database.

For example, a user is importing a client's zip code. The import file has the client's zip code in column three with the header Zip Code. In CAREWare, ZIP Code is stored in the column with the header cln_zip. By setting the column Zip Code in the import file to map to the cln_zip column in the database, CAREWare will correctly update the ZIP code in the client record. The mappings are retained in the import holding tanks and are applied to future imports as long as the column order and column name in import files remain unchanged.

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Upload Sample File for Field Mappings

The first step in mapping the fields involves uploading a sample file that represents the standard format of all imports. The file should include the headers in the specific order. Alternatively, users can upload sample files without headers and a single row of data. CAREWare uses the sample file to generate a list with the data or column headers in that order, and the list is used to map the fields.

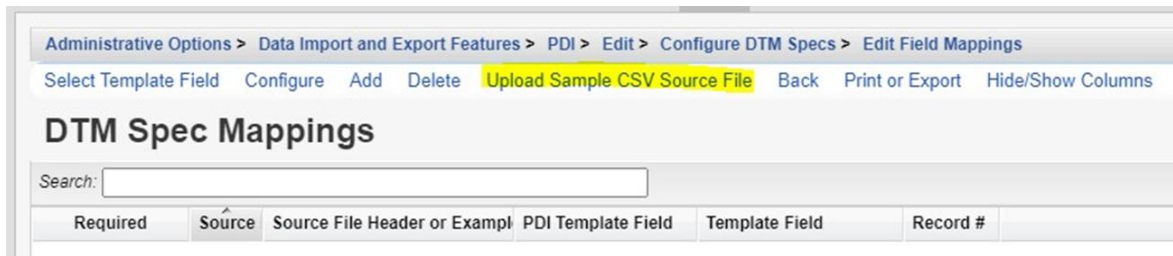
Note: If there are any changes to the import file after the initial field mappings are completed, such as changes to headers or column order, a new sample file needs to be uploaded, and the field mappings need to be completed again.

Field mappings are most used with [DTM imports](#). After adding a DTM Spec, the [DTM Spec can be configured](#) by setting the field mappings.

1. Click the Spec Name to highlight it.
2. Click *Edit Field Mappings*.

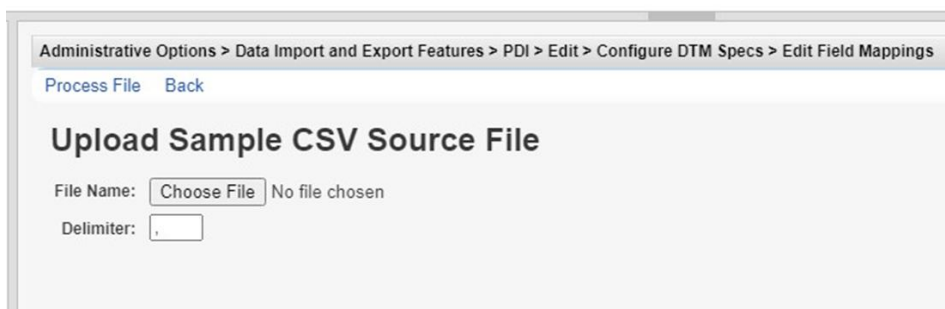
Spec Name	Number of Mappings
LabDTM	0
Test	15

3. Click *Upload Sample CSV Source File*.



Note: A Sample CSV Source File is a template of the imported client data that contains the same columns as the import file. Uploading the Sample CSV Source File populates a list of columns from the import files to be matched with CAREWare template fields.

4. Click *Choose File*.



5. A new window for the Windows File Explorer opens. Select the sample file, and click Open.

6. The name of the sample file appears next to Choose File. Click *Process File*.

Note: Use the correct delimiter when uploading your files. In the screenshot above, the delimiter is a comma. The delimiter any character used to separate records as separate columns. If a client record is listed in a text document with the client's specific identifying information (i.e., URN fields), then the delimiter should be a comma. Other delimiters can be used if that is how the data is formatted.

7. The DTM Spec Mappings appear in list format.

Administrative Options > Data Import and Export Features > PDI > Edit > Configure DTM Specs > Edit Field Mappings					
Select Template Field	Configure	Add	Delete	Upload Sample CSV Source File	Back Print or Export Hide/Show Columns
DTM Spec Mappings					
Search:					
Required	Source File I	Source File Header or Example	PDI Template Field	Template Field	Record #
	2	DOB	<NOT CONFIGURED>		1
	0	First Name	<NOT CONFIGURED>		1
	1	Last name	<NOT CONFIGURED>		1
	3	Service	<NOT CONFIGURED>		1
	5	Service Cost	<NOT CONFIGURED>		1
	4	Service Date	Match Type: Standard Match; Table: exp_service; srv_date		1
	6	Service Units	<NOT CONFIGURED>		1

Select Template Field – Opens the list of CAREWare fields for mapping the Source File Header or Example.

Configure – Settings for the Source File mapping, which includes Match Types to create unique functions.

Add – Adds a blank Source File Header or Example, which can be configured with unique functions.

Delete – Removes the mapping to the Template Field or deletes an added row.

Upload Sample CSV Source File – Uploads a template of the import file for mapping the columns to CAREWare fields.

Back – Returns to the Configure DTM Specs window.

Print or Export – Exports the list of mappings.

Hide/Show Columns – Columns can be unchecked to remove them from the screen or checked to add them.

Complete the Field Mappings

1. Click the source file header or example to highlight it and click *Select Template Field*.

Administrative Options > Data Import and Export Features > PDI > Import Settings > Edit > Configure DTM Specs > Edit Field Mappings					
Select Template Field	Configure	Add	Delete	Upload Sample CSV Source File	Back Print or Export Hide/Show Columns
DTM Spec Mappings					
Search:					
Required	Source File I	Source File Header or Example	PDI Template Field	Template Field	Record #
	0	First Name	<NOT CONFIGURED>		1
	1	Last Name	<NOT CONFIGURED>		1
	2	DOB	<NOT CONFIGURED>		1
	3	Service	<NOT CONFIGURED>		1
	4	Service Date	<NOT CONFIGURED>		1
	5	Service Cost	<NOT CONFIGURED>		1
	6	Service Units	<NOT CONFIGURED>		1

2. Locate the corresponding CAREWare field in the list, highlight it, and click *Select Template Field*.

Note: The list of field names can be shortened by using the Search field to look for related terms. Example: In this case, using the terms exp_service, srv_date, or date reduces the number of possible fields in the list.

Administrative Options > Data Import and Export Features > PDI > Import Settings > Edit > Configure DTM Specs > Edit Field Mappings

Select Template Field Back Print or Export Hide/Show Columns

Map Field: Service Date

Search: exp_service

Table Name	Field Name	Data Type	Max Field Length	Multiple Allowed
exp_service_custom	cst_10 test	Text	4	
exp_service_custom	cst_12-step self-help	Yes/No	1	
exp_service_custom	cst_Allergies_Cm	Text	10	
exp_service_custom	cst_Case Manager	Number	4	
exp_service_custom	cst_Custom Referral Attachment	Attachment	255	
exp_service_custom	cst_IDCs Provider	Text	4	
exp_service	match_id	Text	255	
exp_service	srv_billing_employee	Text	100	
exp_service	srv_billing_end_time	Date	0	
exp_service	srv_billing_start_time	Date	0	
exp_service	srv_category	Text	100	
exp_service	srv_contract_name	Text	50	
exp_service	srv_cs_1	Text	50	Yes
exp_service	srv_cs_1_def_code	Text	127	Yes
exp_service	srv_date	Date	0	

Rows: 20 of 2 Page 1 of 2 Displaying 1 to 20 of at least 24 items

The column from the import file is now mapped to the corresponding field in CAREWare. Any future imports using the DTM spec will automatically follow the mapping methodology.

Repeat steps 1 and 2 to complete the mappings for the sample file.

Administrative Options > Data Import and Export Features > PDI > Import Settings > Edit > Configure DTM Specs > Edit Field Mappings

Select Template Field Configure Add Delete Upload Sample CSV Source File Back Print or Export Hide/Show Columns

DTM Spec Mappings

Search:

Required	Source File	Source File Header	PDI Template Field	Template Field	Record #
	0	First Name	Match Type: Standard Match; Table: exp_client; Fi	cln_first_name	1
	1	Last Name	Match Type: Standard Match; Table: exp_client; Fi	cln_last_name	1
	2	DOB	Match Type: Standard Match; Table: exp_client; Fi	cln_dob	1
	3	Service	Match Type: Standard Match; Table: exp_service; Fi	srv_cs_1_def_co	1
	4	Service Date	Match Type: Standard Match; Table: exp_service; Fi	srv_date	1
	5	Service Cost	Match Type: Standard Match; Table: exp_service; Fi	srv_price	1
	6	Service Units	Match Type: Standard Match; Table: exp_service; Fi	srv_quantity	1

Import the DTM File

Once the mappings are complete, client level data can be imported using the DTM settings and DTM Spec that was created.

To begin importing records using this configuration, follow the instructions [here](#) for importing DTM files.

Considerations for Field Mappings

- New Clients-** New clients can be added from records other than exp_client. However, URN fields are required within the record to add new clients. When matching these URN fields, make sure to match them to exp_client.

Administrative Options > Data Import and Export Features > PDI > Edit > Configure DTM Specs > **Edit Field Mappings**

Select Template Field Back Print or Export Hide/Show Columns

Map Field:

Search:

Table Name	Field Name	Data Type	Max Field Length	Multiple Allowed
exp_client	cln_first_name	Text	25	

- Client ID Matching** - If matching by Client ID, a custom field, or EHARS State ID, make sure to use the corresponding match_id based on the record being imported. If exp_service is being imported, for example, then match the Client ID with the match_id of exp_service.

[illegible]