



## Using the 'Import Posts' Function

Included in the release of Version 5.0 of ePortfolio for Deanery Administration is the 'Import Posts' function. This allows users to upload much of the new trainees' information 'en masse' in to the website from an excel spreadsheet.

This function is currently only configured for those Deaneries that requested it in time for the release of Version 5.0 of the ePortfolio. The system is configured to specific templates as provided to the ePortfolio team by the respective Deaneries prior to release.

For guidance see [The e-Portfolio Administration User Guide](#).

<b>Regional Admin</b>	
Trainees	
Deanery Panels	
Training Events	
Help Admin	
ePortfolio Administration	•••••
FAQ	
Help	
e-Portfolio Enquiries	
Logout	

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**Tasks**

- [Edit locations within your deanery](#)
- [Create a new user](#)
- [Create a new post / edit a post](#) (for an existing trainee)
- [Add / Change a user's role](#) (e.g make a tutor also an educational supervisor)
- [Change a non-trainee's location](#) (i.e. Supervisors, Trainers and Administrators)
- [Assign a trainee to a specific Educational Supervisor, Clinical Supervisor or Trainer](#)
- [Panel Member Management](#)
- [Reports](#)
- [Import Posts](#)

Click the ePortfolio Administration link in the side menu and you will find 'Import Posts' at the bottom of the 'Tasks' list. When you click on this link, if you have been given the option to import posts, a new page will open and offer the following:

## Post Import -

**Upload**

Excel file to upload:

*Click Upload to upload the file and begin the import*

Use the 'browse' button to locate the excel spreadsheet you wish to import and once selected click on the 'Upload' button. A progress bar will show how far along this operation is until finally showing 100% and a summary.

**Progress**

100 %

Current Status: *Import Complete*  
Started: 7/20/2010 12:25:48 PM, Ended: 7/20/2010 12:26:04 PM

Below the progress box is the summary section -

**Summary**

Summary  
Posts successfully extracted from Excel: 0  
Posts unsuccessfully extracted from Excel: 9  
Warnings from posts extraction: 0

Records inserted: 0  
Records not inserted: 0

**Warnings**

**Errors**

```
Import Failed: "Post From" and "To Date" already entered for that trai:
Import Failed: "Post From" and "To Date" already entered for that trai:
Import Failed: "Post From" and "To Date" already entered for that trai:
Import Failed: "Post From" and "To Date" already entered for that trai:
Import Failed: "Post From" and "To Date" already entered for that trai:
```

Here you will see how many imports were successfully completed along with any 'Warnings' and 'Errors' relating to the import. Please see below for what these error messages mean.

## Warnings

*"Import Warning: On Row: 6, For Specialty: The value ('Paeds') was not found in our tables or our Lookup table for your Deanery"*

The website has failed to match or recognise the value 'Paeds' - avoid abbreviations for specialties, so in this case 'Paediatrics' would work. Instead of 'O&G', use 'Obstetrics & Gynaecology.' Alternatively, a more obscure specialty may not exist in the database and this warning will occur.

A similar example here:

*"Import Warning: On Row: 19, For Location: The value ('GP Placement to be Confirmed') was not found in our tables or our Lookup table for your Deanery"*

This means that on row 19, in the 'Location' column, the website doesn't recognise the entry 'GP Placement to be Confirmed.' Similar errors may indicate that the location has been written in a different way or may not even exist as compared to the pre-existing entries in the website database.

Another one:

*"Import Warning: On Row: 16, For WTE: The value (") was not found in our tables or our Lookup table for your Deanery"*

This means that on row 16 in the column 'WTE' the website recognises that a value that it expects to find is missing i.e. there is nothing for this field on the original spreadsheet.

**NB: The website is not copying and pasting the data on import, rather it is comparing it to a table of preset values - if it is unable to match these presets it will return a warning. The relevant information will then need to be entered manually against the trainee in the website.**

## Errors

*“Import Failed: “Post From” and “To Date” already entered for that trainee. Row: 22“*

This error usually indicates that a trainee, in this case the one on row 22 of the excel spreadsheet, has had their details imported already - the import system will not duplicate entries therefore allowing the operation to be run multiple times with the same file. Any changes or updates to a trainee's details if they have already been imported in to the system should be entered directly in to the website.

*“Import Failed: “Post - From Date” Invalid on row: 494”*

The above error indicates that the data for the “Post - From Date” is incorrect for the trainee on row 494 of the spreadsheet. This could relate to the format the date is in or the date itself. A correct date will be in the format, “03/08/10”, whereas having, “Aug 10” will return an error.

*“Import Failed: “GMC Number” Invalid on row: 570”*

The above error indicates that either the format and/or value of the GMC on row 570 is incorrect e.g. should be numbers only.

*“Import Failed: Record Insert Failed: User with GMC Number: 123456, not found in our database“*

This error normally indicates that a trainee has not registered yet or that their registration details have not yet been updated - if they have registered try the import 24hrs later.

Please note, the more accurate and ‘complete’ the source data in the excel spreadsheet is, the better the import function will work and fewer warnings and errors will be returned. This in turn will reduce the requirement for manual updates.

**The minimum required ‘correct’ data for a trainee to allow an import includes the GMC number and the ‘Start Post’ and ‘End Post’ dates.** As long as these are valid, an entry will be made in to the ePortfolio. Any subsequent values that ‘fail’ with the associated warning, e.g. Specialty, Location, WTE, will need to be manually entered against the trainee's details in the website.

As Version 5.0 is the first version to use the import system we encourage feedback on its usefulness. Should it prove to be a popular addition then its functionality may be expanded in future releases.