

Create a PPS xml upload file for MH from Excel spreadsheet example

The XML template file is essentially the XML upload layout file which is saved as a .xml file. Here are some other conventions to remember:

- no column labels are permitted in the Excel record spreadsheet
 - all cells in the Excel spreadsheet are text-formatted (not numeric or date)
 - the first several cells (columns A, B, C, D and E) of the first row in the Excel spreadsheet are reserved for values for submission type, submitter organization code, submission date, MCI flag, and # of records to be transmitted; records should be batched as either needing an MCI# "Y" or not needing an MCI# "N" - do not mix records
 - the client data begins in the F column cell of the first and subsequent rows
 - the data columns in the Excel spreadsheet should be in the same order as the XML file fields are ordered
1. Create and format a blank Excel spreadsheet that will contain the records you want to upload (see MH sheet from example_file_AODAMHCORE_XML.xls).
 2. Import or open the text or database file containing the records to upload in Excel and use the file import wizard or copy and paste as appropriate. If you are using 'Import External Data' wizard then do not forget to uncheck checkbox for 'Save Query definition' in the External Data Range Properties box.
 3. Insert five columns at column A and in the first four cells (columns A, B, C, D and E) of the first row add values for the Submission type, submitter organization code, submission date, MCI flag, and # of records to be transmitted.
 4. Click on Data tab in the toolbar then XML then XML Source to open the XML Source window.
 5. At the bottom of the XML Source pane, click on XML Maps.
 6. In the window click on Add.
 7. Select MH_XML_Template.xml from your local drive and Click Open.
 8. Click OK for a schema to be created.
 9. Click OK for the map to be added or rename it and then click OK.
 10. Click on cell A1 in the spreadsheet then click on submission_type in the source panel; right click on submission_type; click Map element
 11. In the pop-up box, make sure it shows A1 then click OK.
 12. Click on cell B1 in the spreadsheet then click on folder header_record in the source panel; right click on header_record; click Map element
 13. In the pop up box, make sure it shows B1:E1 then click OK.
 14. If a message pops up about incompatible format, assuming your spreadsheet is in the correct format, choose "Use existing formatting" (in spreadsheet and ignore the XML template).
Note: Clicking on "Match element data type" will change the spreadsheet cell formatting to that which is in the XML template.
 15. Click on cell F1 and highlight the cells F1 through CD1.
 16. Using the toolbar or the right click mouse function then 'insert' and 'shift cells down' then OK. This must be done to allow for multiple detail records without losing the first record.
 17. Click on cell F1 then click on folder detail_record; right click on detail_record; click Map element.

18. In the pop up box, it should have F1:CD1; click OK.
19. If a message pops up about incompatible format, assuming your spreadsheet is in the correct format, choose "Use existing formatting" (in spreadsheet and ignore the XML template).
Note: Clicking on "Match element data type" will change the spreadsheet cell formatting to that which is in the XML template.
20. Click in any blank cell (like B3) and click File-Save As and name the file (PROGRAM_AGENCY_DATE_TIME.xml e.g., MH_109_20120615_0900.xml); select XML Data as the Save as type from the drop down options. Do not save as XML spreadsheet.
21. Click Save; click Continue in the pop-up.
22. Open the XML Data File using an XML editor, XML spy or notepad to view your file.
23. Add following line to "submission" tag and save the file.
xmlns="http://www.wisconsinedi.org"
24. Your file is ready for submission.