

As of version 1.6.4 GemsTracker has the ability to import answers to surveys.

During import each set of answers must be linked to an existing token. GemsTracker also checks for existing answers and handles them according to your preferences.

To import answers you need of course sufficient rights to do so. Having those rights you can either select a survey in the track builder and import the answers into that survey or you can select the generic import wizard and select the survey you want to import to there.

## Import formats

After selecting a survey the wizard will show you which fields are available in the survey. Some of the fields depend on the **Translation definition** you choose, but the answers in the survey are usually the same for each translation definition as the default translation definitions only determine the method used to link a set of answers to a specific token.

You can then choose either to upload a file or use a large text field to put the import data in. GemsTracker currently supports three file formats: XML, CSV and tabbed text. The text field supports only the use of tabbed texts (e.g. a straight copy and paste from Excel).

The import will only import those answers that are in the import. Not supplied answers will be left empty or - when the answer exists - not be overwritten by the import.

### The XML format

XML Files can use any name for the root element, though if you have the choice we suggest the root tag `<gems>`.

The root tag should contain one or more answer elements. Again any tag name will do for an answer, but if you have the choice: use `<answer>` tags.

Within each `<answer>` element the individual fields are stored in elements using the field name name and format defined by the *\*import definition\** for the survey. Fields are not required unless this is stated in the import definition. Actually you can use a different set of fields for each answer, but in reality this does not happen.

The order of the fields is of no importance.

### The CSV and tabbed text formats

Both these formats expect the text to be encoded using UTF-8 or US ASCII. You should always check the encoding of you import file.

Also in both formats the first line should contains the names of the fields that are about to be imported. This also defines the field order used during the import.

In CSV files fields containing comma's or newline characters **must** be enclosed in "double quotes". Other fields *may* be enclosed in double quotes. Double quotes within a double quoted field should be escaped by prepending a slash `\`.

CSV uses comma's ( , ) as a field separator and records are separated using newline characters. Both Unix style \n line endings and Windows style \r\n are supported.

Tabbed text files use the tab \t character to separate fields and newline characters to separate records. Again both Unix style \n line endings and Windows style \r\n are supported. Tabbed text fields cannot contain either tabs or newline characters.

## Linking answers to tokens

There are three methods for linking the an answer to a token.

### Link by patient id and organization

Use this option if the data contains the patient id and an organization id. The organization id can either be the GemsTracker internal organization number or the **Healthcare provider id, Code name** or just the **Name** specified for the organization in the GemsTracker setup.

This option will use the first uncompleted token the patient has. If no uncompleted tokens exist the last completed token will be used instead.

### Link by patient id, organization and completion date

Use this option if the data contains also contains a completion date.

GemsTracker will then only select a token when it was valid at the completion date. Again this option will use the first uncompleted token the patient has and that is valid for the completion date and if no uncompleted tokens exist the last completed token will be used instead.

### Link by token

If the GemsTracker token is in the import just use this option. It is the only 100% sure method for linking an set of answers to a specific token.

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Last update: 2020/03/12 12:08

