medgate GX

Medgate Employee Import Program
Administrator Guide

Table of Contents

# Introduction

The Medgate Employee Import Program (MEIP) is a standalone utility that allows users to import employee demographic information from a separate HR system using a **comma-delimited** export file. MEIP can be run interactively or silently as a scheduled task.

Automated execution of MEIP can be scheduled under the Windows Operating Systems using any scheduler such as Scheduled Tasks.
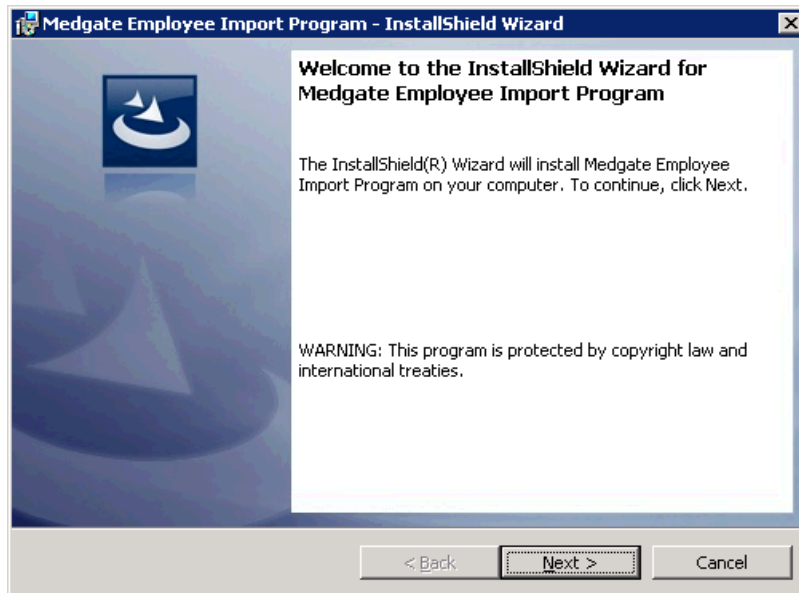
Installation

If you have installed any previous version(s) of Medgate Employee Import Program, please uninstall the old version before proceeding to this new installation.

1. From the Medgate application CD, locate the folder *Medgate Employee Import Program*.

2. Open the folder and run setup by double-clicking on the **Medgate Employee Import Program.msi** icon.
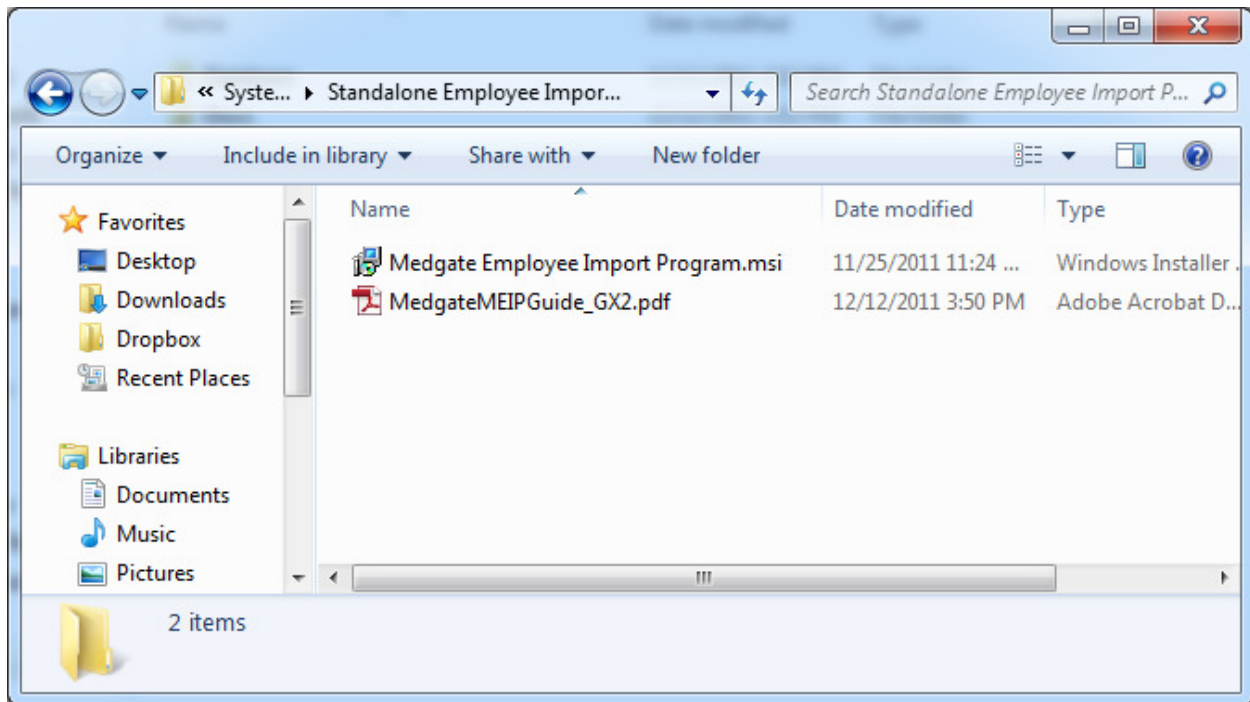
3. The Installshield Wizard for *Medgate Employee Import Program* will start. Click on **Next** to continue.

4. On the *Ready to Install the Program* screen, you can review your installation options. If you wish to change any of your installation settings, click on **Back**.

To proceed with the installation, click on **Install**.
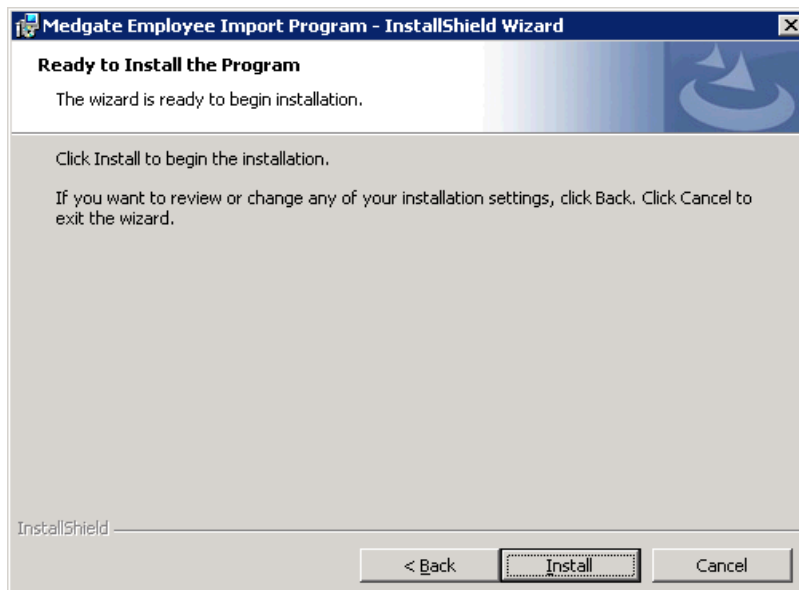
5. The Installshield Wizard will then begin installing MEIP. This process may take several minutes.
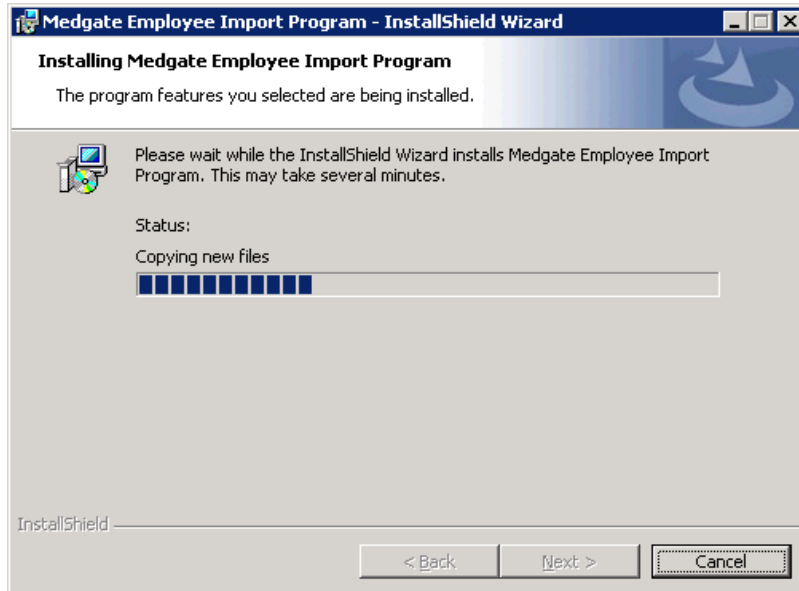
6. When the installation completes, click on **Finish** to exit the Installshield Wizard.

Specifying the Import File Format

The import format must be specified before running MEIP. This is done through the Medgate Application.

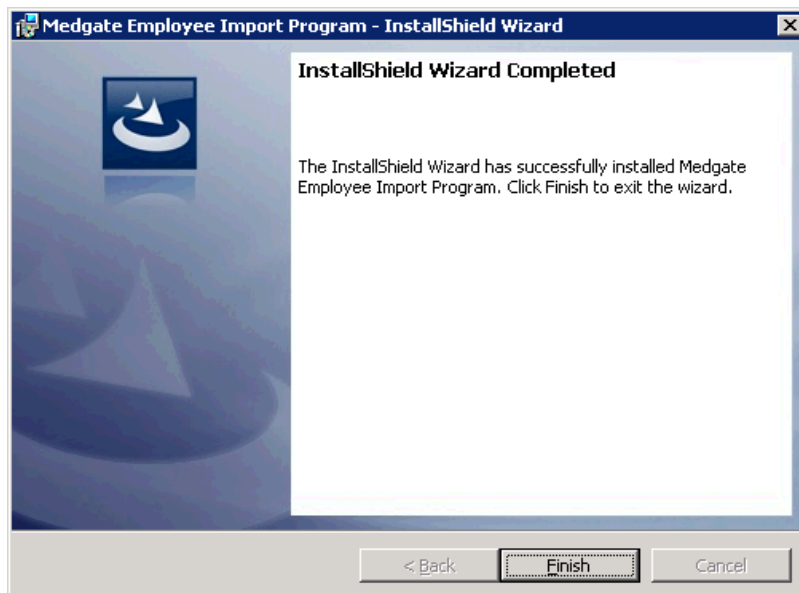The import file format may be customized to your specified format. **The only restriction is that the first field must be EMPLOYEENO.** Once the format has been configured, MEIP will then read the saved format and import using those settings.

The import format CANNOT be configured through MEIP, it must be done through the Medgate Application using same user as in MEIP.
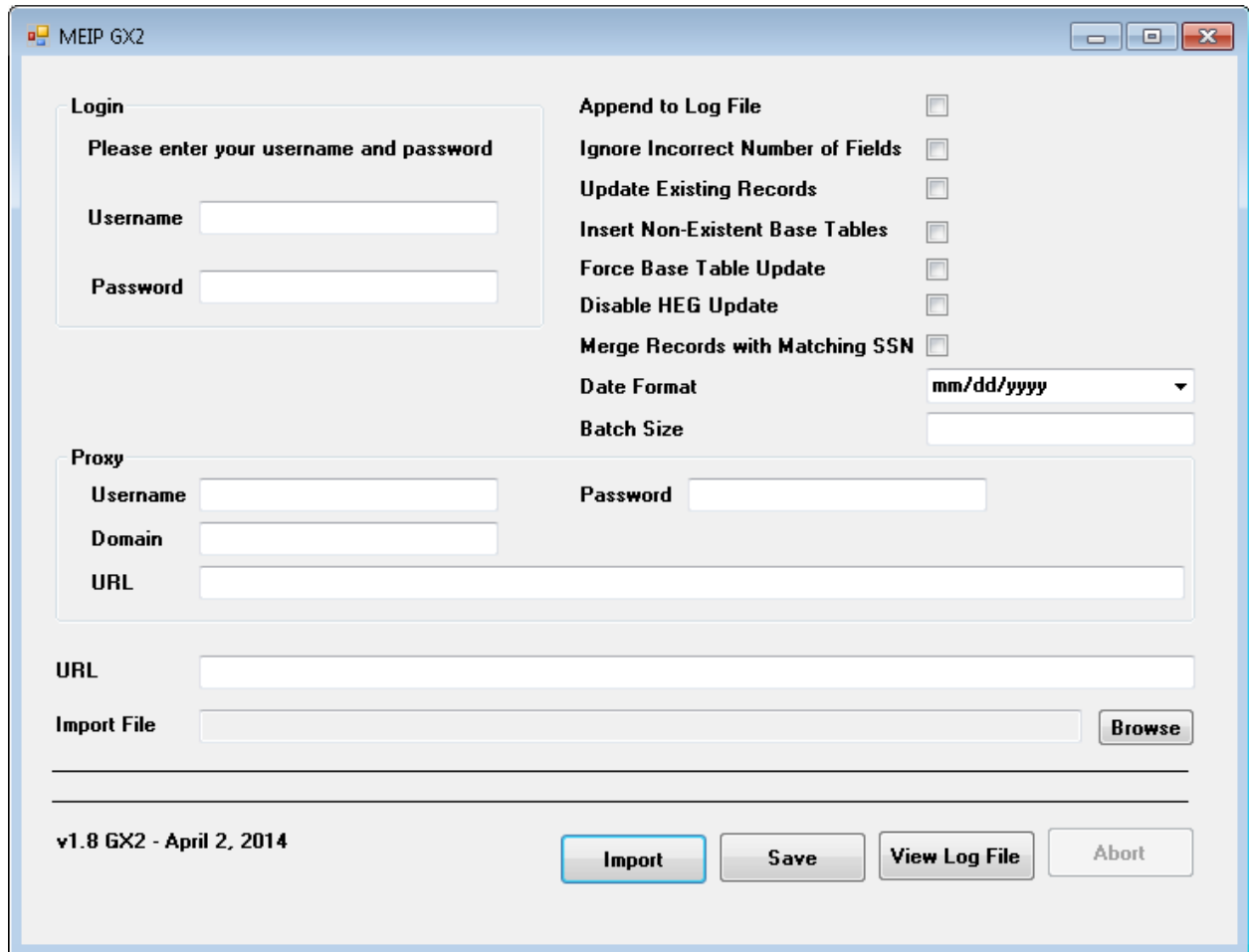
Configuring the Medgate Employee Import Program

1. Select START > PROGRAMS > MEDGATE > MEDGATE EMPLOYEE IMPORT
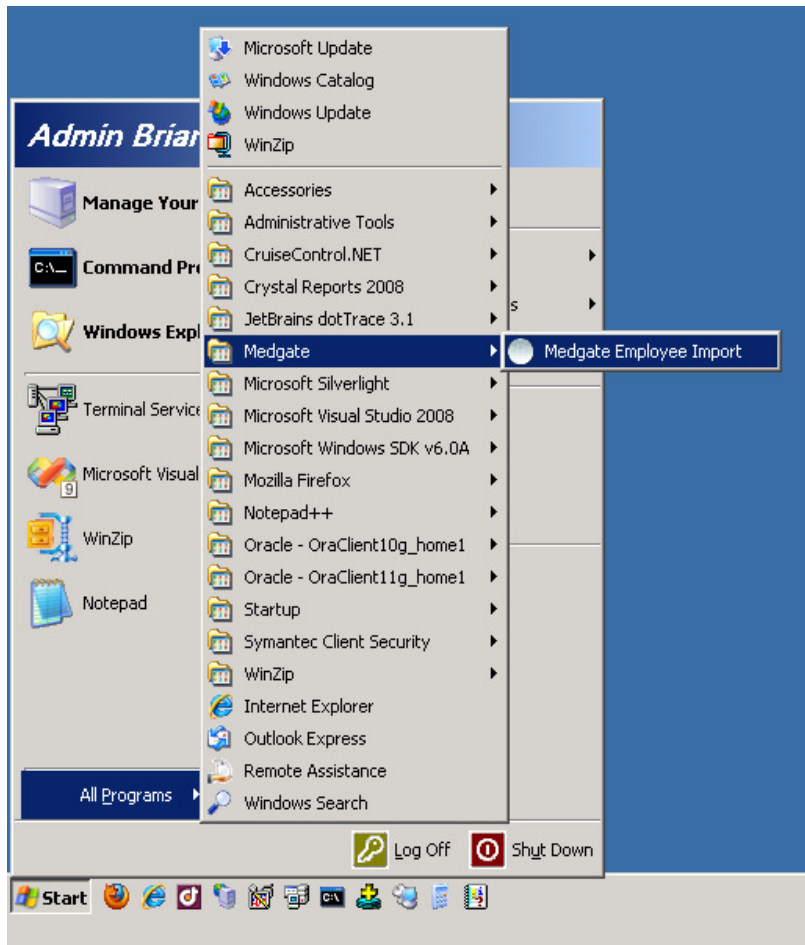
2. The first time you run MEIP, you will begin with the following screen:

MEIP GX2

Login

Please enter your username and password

Username

Password

Append to Log File ☐
Ignore Incorrect Number of Fields ☐
Update Existing Records ☐
Insert Non-Existent Base Tables ☐
Force Base Table Update ☐
Disable HEG Update ☐
Merge Records with Matching SSN ☐
Date Format   mm/dd/yyyy ▾
Batch Size

Proxy

Username   Password
Domain
URL

URL

Import File   Browse

v1.8 GX2 - April 2, 2014   Import   Save   View Log File   Abort

3. Before you can run MEIP, you must enter your settings:

Login Username	The Medgate user name you wish to run MEIP as.
Login Password	The Medgate user password you wish to run MEIP as.
	The password is encrypted before being saved to the ini file. The encryption depends on a key that is user/machine specific. This means that one user cannot decrypt the password from an ini created by another user. This is an important point to keep in mind when configuring MEIP to run automatically/silently.
URL	The URL of the MEIP web service to be used.
Proxy Username	The user name used when connecting to the web proxy.
Proxy Domain	The domain used when connecting to the web proxy.

Proxy Password	The password used when connecting to the web proxy. The password is encrypted before being saved to the ini file. The encryption depends on a key that is user/machine specific. This means that one user cannot decrypt the password from an ini created by another user. This is an important point to keep in mind when configuring MEIP to run automatically/silently.
Proxy URL	The URL of the web proxy.
Import File	The filename of a comma delimited file that contains the data you wish to import into the Medgate application.
Append to Log File	Whether to overwrite the existing log file or to append.
Ignore Incorrect number of fields	Ignore the number of fields coming from the import file. If there are more fields than the import format, they are ignored, if there are fewer fields, the missing fields are considered as null.
Update Existing Records	Whether to update existing records or not.
Insert Non-Existent Base Tables	Whether to insert non-existent base table entries or not.
Force Base Table Update	Whether to update base table descriptions or not.
Disable HEG Update	Whether to update SEGs for the employees based on GDDLO or ignore the SEG updating.
Merge Records with Matching SSN	Match employee records based on SSN instead of employee number.
Date Format	Date format used in the import file.

Once you have finished entering your settings and clicked on the **Import** button, the settings will be saved automatically for future imports. The configuration file, meip.ini, will be saved in the same directory as in which meip.exe resides. By default the path will be *C:\Program Files\Medgate Employee Import\meip.ini.*

Security

To run the MEIP service, a user must be granted either the admin role or meip.import action.

If Medgate is configured to use LDAP for authentication then MEIP will also use this method. In all other cases MEIP will use "Application User ID and Passwords".

As a batch process, MEIP does not enforce site security. So a user who can run MEIP will be able to import employees for any site. Site security will still be enforced within the application.

Network/Firewall Configuration

Medgate hosted sites require the use of https(SSL). Firewalls should allow access through port 443.

On self hosted sites, it is possible to use standard http without SSL, which will require access to port 80 unless otherwise configured by the web administrator.

Configuring http and https (SSL)

To use https with the MEIP web service the web.config must be configured with the following:

The end point binding for the service must contain a base address starting with https, the mex end point must use the binding "mexHttpsBinding" and the security mode for the wsHttpBinding should also be set to "Transport".

Examples:

```
<security mode="Transport"><!--change to "None" for http-->
```

```
 <endpoint address="https://myserver/gx_pr/webservice/meipservice.svc"
binding="wsHttpBinding"…
 <endpoint address="mex" binding="mexHttpsBinding" contract="IMetadataExchange"/>
```

If not using https(SSL) then the base address should start with http, the mex binding should be "mexHttpBinding" and the security mode set to "None".

Silent/Automated Running

MEIP can be run automatically with no interaction using previously saved settings. The command line parameter /**s** may be used to initiate silent running. This is useful for automated imports which are scheduled to run on a regular basis.

When configuring for silent running (saving the configuration to the ini) please ensure that you do it as the user that will be running the task. This is required so that the password saved to the ini file can be decrypted properly for the run.

Example:

C:\Program Files\Medgate Employee Import\meip.exe /s

Viewing the Log File

To view the results/statistics of an import run or to view any error messages that may have occurred during the import, you can view the log file by clicking on **View Log**. The log file, meip.log, will be saved in the same directory as in which meip.exe resides. By default the path will be *C:\Program Files\Medgate Employee Import\meip.log.*

```
meip.log.txt - Notepad
File  Edit  Format  View  Help
>>>>>>>>>>>>>>>>>>>> START >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
11/19/2010 7:51:24 PM - Medgate Employee Import Started
11/19/2010 8:02:01 PM - IMPORT COMPLETED SUCCESSFULLY!
11/19/2010 8:02:01 PM - Medgate Employee Import Finished
11/19/2010 8:02:01 PM -
11/19/2010 8:02:01 PM - Import Statistics
11/19/2010 8:02:01 PM - -------------------------------------------
11/19/2010 8:02:01 PM - Records Added    : 0
11/19/2010 8:02:01 PM - Records Updated  : 31335
11/19/2010 8:02:01 PM - Records Skipped  : 0
11/19/2010 8:02:01 PM - Import Run Time  : 0h 10m 37s
11/19/2010 8:02:01 PM - -------------------------------------------
<<<<<<<<<<<<<<<<<< END <<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<<
```
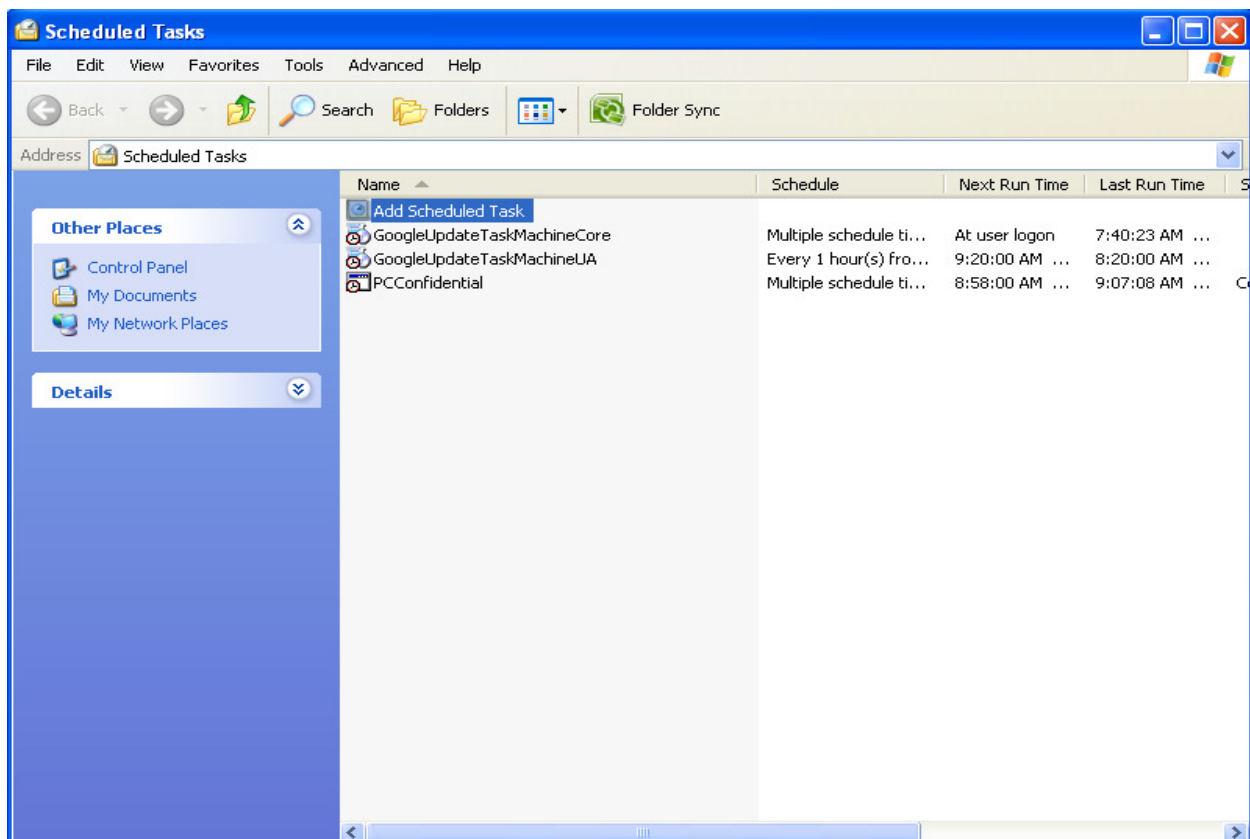
Scheduling Employee Import

This application allows administrators to automate the import task with scheduling utilities such as Scheduled Tasks (Windows 2000/XP/2003 Workstations/Servers). Administrators can schedule the import to run once or to automate reoccurring imports at any date and time.
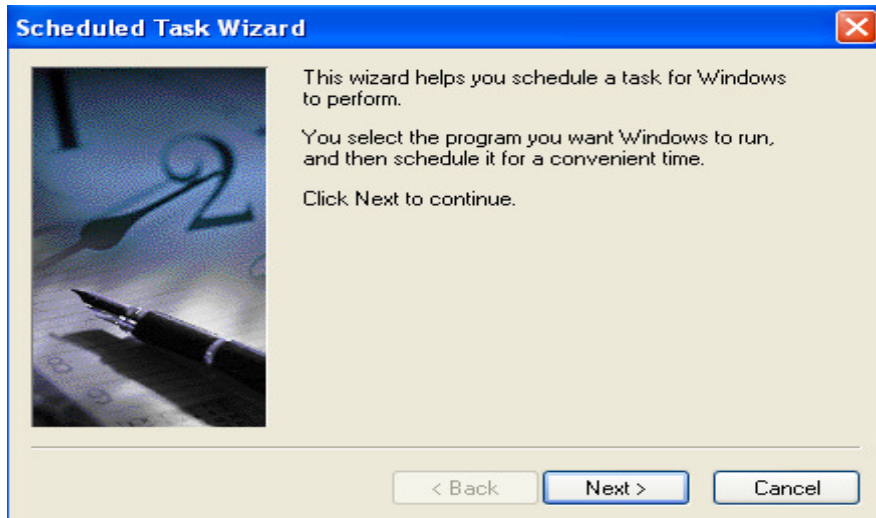
Scheduling an import task using Scheduled Tasks

1. Select START > PROGRAMS > ACCESSORIES > SYSTEM TOOLS > SCHEDULED TASKS.

2. Double-click on **Add Scheduled Task**.

The **Scheduled Task Wizard** starts. Click **Next** to continue.

3. A list of applications on your Windows machine is shown.

Scroll down the list and highlight **Medgate Employee Import**.
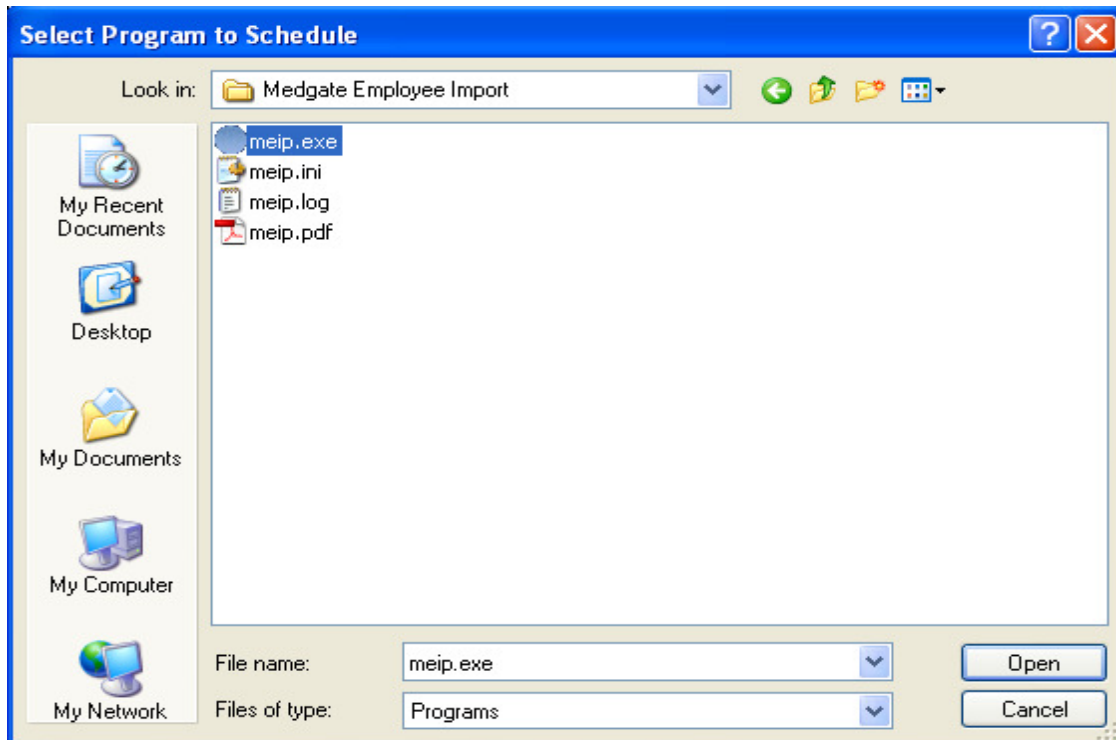
Select **Next** to continue

OR

Click **Browse** and locate the **meip.exe** of the import program.

By default, the path is *C:\Program Files\Medgate Employee Import\meip.exe*.
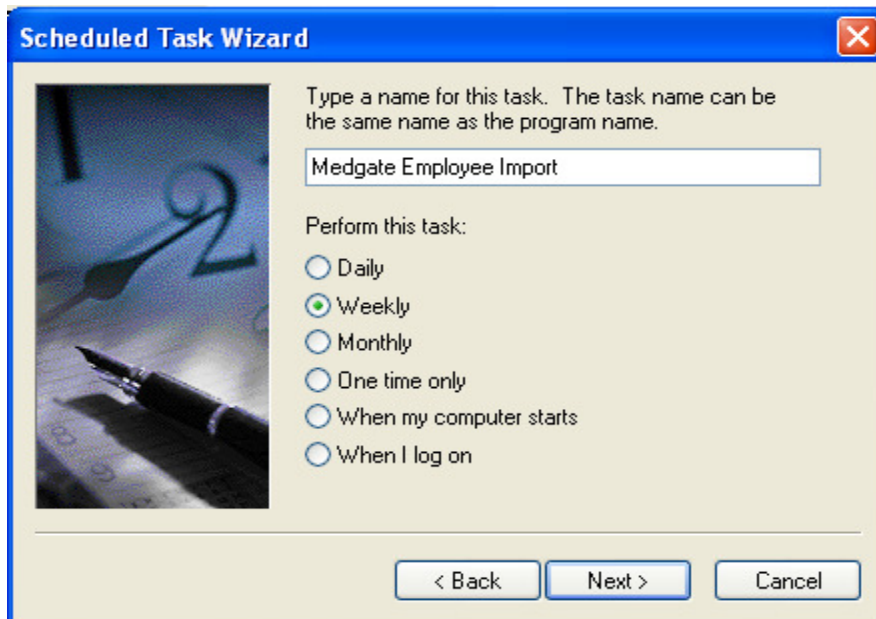
Select the file and select **Open**.

4. Type in a name for the scheduled task.

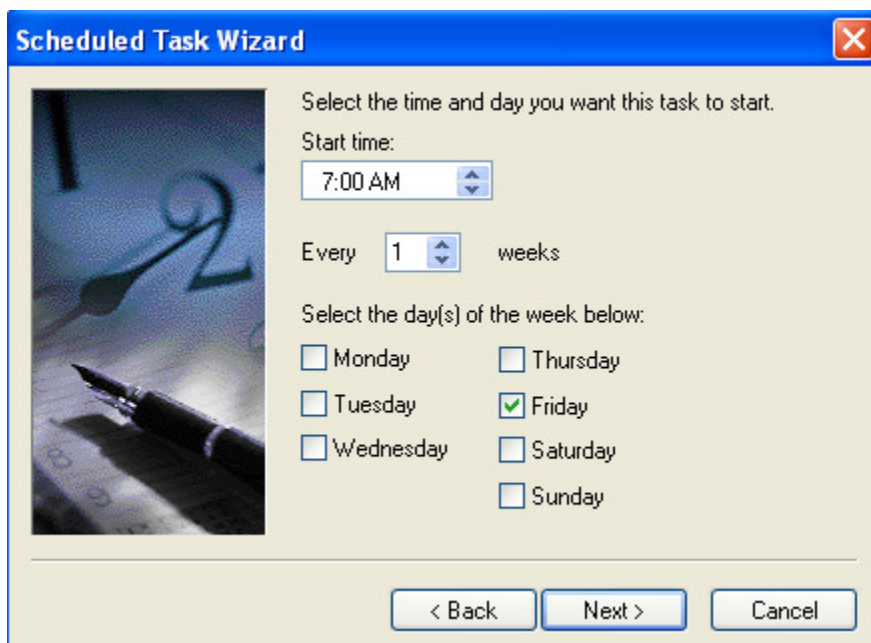Select the time interval you want to perform this task.

Select **Next** to continue.

5. Select the time and day you want the scheduled task to begin.

Select **Next**.

6. Type in the User Login ID and password, if necessary. If no login is required, leave it blank.

Select **Next**.

7. The task is created successfully.

More advanced options are available to configure the scheduled task.

To access these options, check the **Open advanced properties** checkbox before you click the Finish button.

Select **Finish** to exit the wizard.
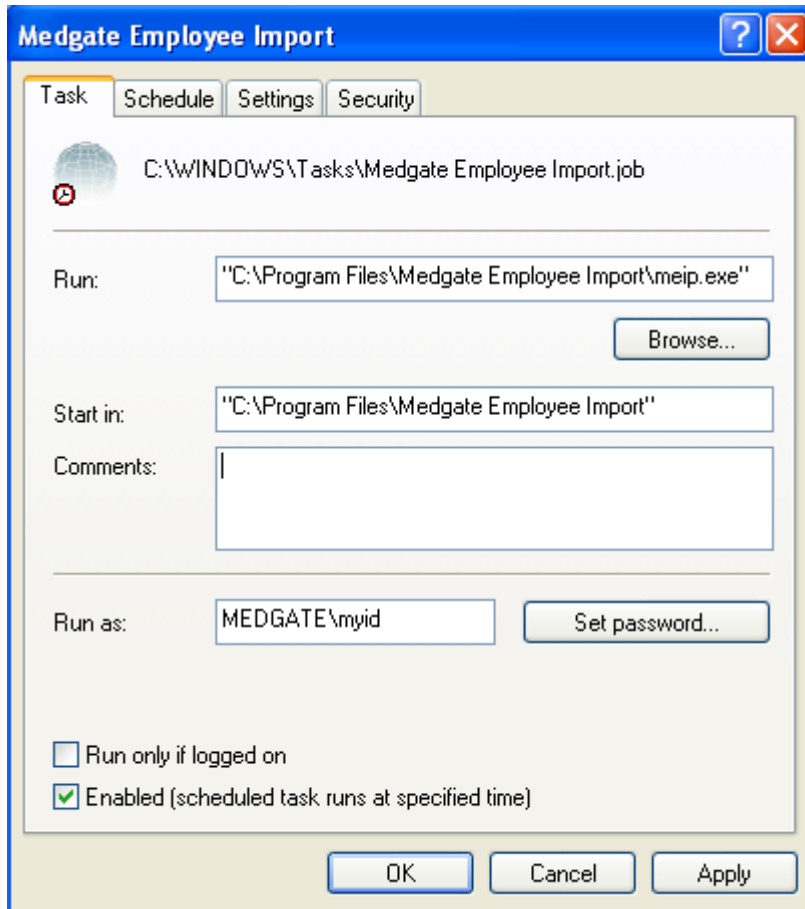
8. As the import is scheduled to run unattended, we need to modify the command line for this scheduled task.

On the *Scheduled Tasks* window, double-click on the task **Medgate Employee Import**.
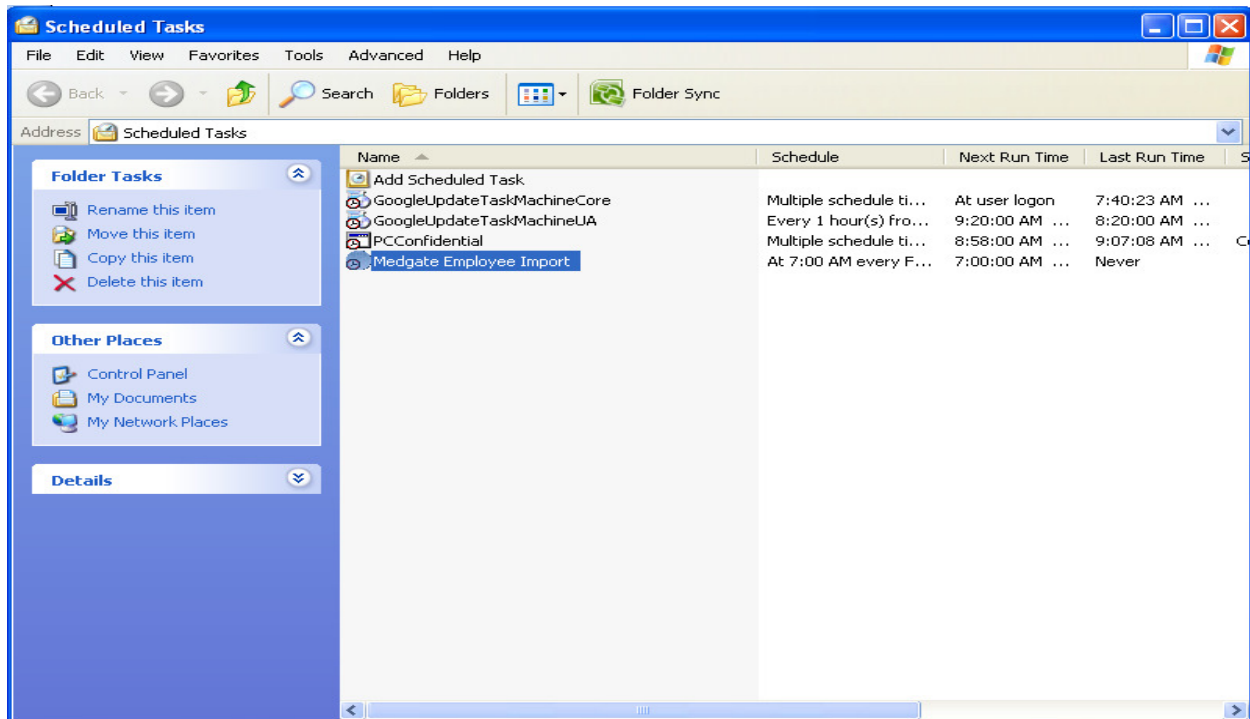
9. The *Medgate Employee Import Properties* dialog box appears.
Select the **Task** tab.

10. In the **Run** field, the path to the **meip.exe** should be followed by the parameter **/s**.

At the end of the command line, add the parameter **/s**.

The parameter **/s** denotes silent or automated execution on the command line.
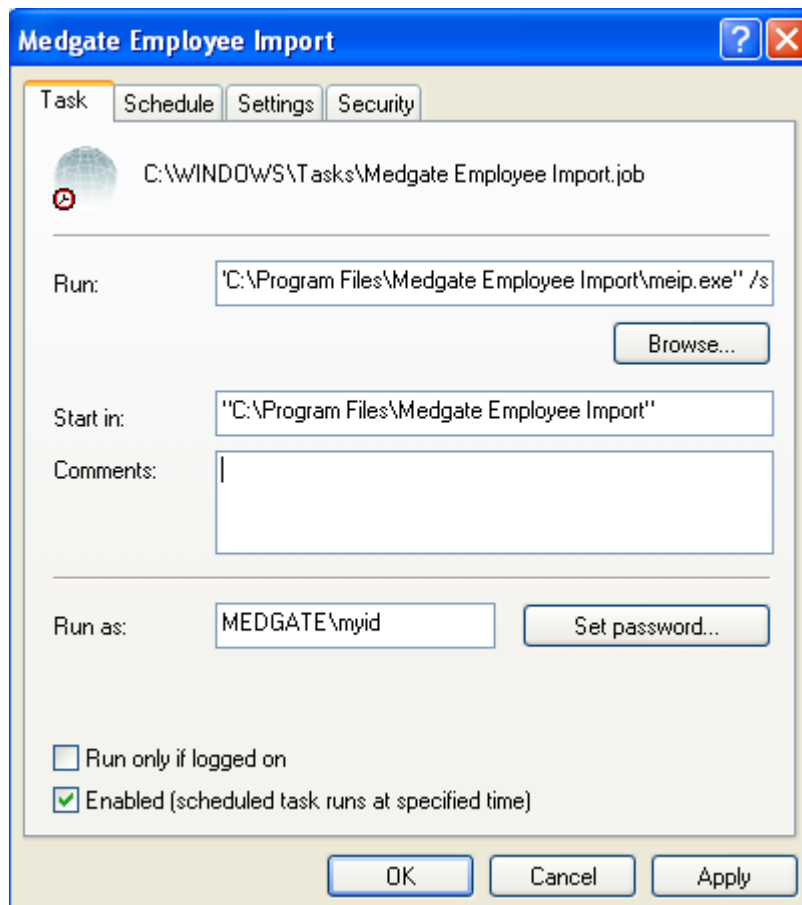
11. Click **OK** to save the changes.

Employee Import File Format

The employee import file must be a **comma-delimited** text file.

The following conventions must be followed:

- **All** fields are to be separated by a single comma (,)
- **Dates** SHOULD NOT be enclosed in quotes, ie. 11/29/2002
- **Numbers** SHOULD NOT be enclosed in quotes, ie. 5
- **Yes/No** and **True/False** are denoted as true and false respectively.
- **Male, Female, Both or None** are denoted as 0, 1, 2 and 3 respectively.
- To denote the value **NULL**, leave the space between commas empty, ie. text, ,text2

Examples:

Format: text, date, number, yes/no, text

1. MG12345,11/29/2002,12,true,Software

2. PC-809, , , ,Medgate

3. 8806589A,01/01/2002,2, ,Medical

4. 0000000549,04/27/1978,8,0,text with special characters",

Field	Type	Size	Description
CellPhone	text	24	Cell phone of Employee
Country.Code	text	20	Code for Home country of Employee
Country.Description	text	100	Description for Home country of Employee
DateOfBirth	date		Date of birth for Employee
DateOfHire	date		Date of hire for Employee
DateOfTermination	date		Date of termination for Employee
Department.Code	text	20	Code for Department of Employee
Department.Description	text	100	Description for Department of Employee
Division.Code	text	20	Code for Division of Employee

Field	Type	Size	Description
Division.Description	text	100	Description for Division of Employee
DriverLicenseClass	text	2	License class of license for Employee
DriverLicenseNumber	text	30	Driver's license number of Employee
DriverLicenseState.Code	text	20	Code for License state of license for Employee
DriverLicenseState.Description	text	100	Description for License state of license for Employee
Email	text	250	Email address of Employee
EmergencyContact	text	100	Emergency contact for Employee
EmergencyHomePhone	text	24	Emergency home phone of Employee
EmergencyRelation	text	20	Emergency relation of contact for Employee
EmergencyWorkPhone	text	24	Emergency work phone of Employee
EmployeeNumber	text	20	Employee number of Employee
EmployeeType.Code	text	20	Code for Employee type of Employee
EmployeeType.Description	text	100	Description for Employee type of Employee
EthnicGroup.Code	text	20	Code for Ethnic group of Employee
EthnicGroup.Description	text	100	Description for Ethnic group of Employee
FirstName	text	50	First name of Employee
FullName	text	102	Full name of employee
FullNameAndNumber	text	125	Full name and number of employee
Gender	int	4	Gender of Employee
GeographicLocation.Code	text	20	Code for Geographic location of Employee
GeographicLocation.Description	text	100	Description for Geographic location of Employee
HealthInsurance.Code	text	20	Code for Health Insurance of Employee
HealthInsurance.Description	text	100	Description for Health Insurance of Employee
HipaaAuth	bit	1	Whether employee has HIPPA authorization
HipaaAuthDate	date		HIPPA Authorization date of Employee
HomeCity	text	40	Home city of Employee
HomePhone	text	24	Home phone of Employee

Field	Type	Size	Description
HomeStreet1	text	240	Home street1 of Employee
HomeStreet2	text	240	Home street2 of Employee
HomeZip	text	12	Home zip of Employee
HourlyRate	float	8	Hourly rate of the employee
JobPosition.Code	text	20	Code for Job position of Employee
JobPosition.Description	text	100	Description for Job position of Employee
JobPositionGroup.Code	text	20	Code for Job position group of Employee
JobPositionGroup.Description	text	100	Description for Job position group of Employee
JobType.Code	text	20	Code for Job type of Employee
JobType.Description	text	100	Description for Job type of Employee
LastName	text	50	Last name of Employee
Location.Code	text	20	Code for Location of Employee
Location.Description	text	100	Description for Location of Employee
LoginId	text	30	LoginId of Employee
MaidenName	text	20	Maiden name of Employee
MailStop	text	15	Mail stop of Employee
MaritalStatus.Code	text	20	Code for Marital status of Employee
MaritalStatus.Description	text	100	Description for Marital status of Employee
MedicalInsuranceNumber	text	35	Medical insurance number of Employee
MedicalRecordNumber	text	15	Medical record number of Employee
MiddleName	text	50	Middle name of Employee
MonthlyWorkHours	int	4	Monthly work hours of Employee
NickName	text	50	Nick name of Employee
Organization.Code	text	20	Code for Organization of Employee
Organization.Description	text	100	Description for Organization of Employee
Pager	text	24	Pager of Employee
Photo	binary		Photo of Employee
Physician	text	100	Full Name for physician
PhysicianCity	text	40	City of physician for Employee
PhysicianPhone	text	24	Phone of physician for Employee
PhysicianState.Code	text	20	Code for State of physician for Employee
PhysicianState.Description	text	100	Description for State of physician for Employee

Field	Type	Size	Description
PhysicianStreet	text	240	Street of physician for Employee
PhysicianZip	text	12	Zip of physician for Employee
SeniorityDate	date		Seniority date of Employee
ShiftCode.Code	text	20	Code for Shift code of Employee
ShiftCode.Description	text	100	Description for Shift code of Employee
SSN	text	20	SSN of Employee
SSNMask	text	20	SSN Mask of Employee
State.Code	text	20	Code for Home state of Employee
State.Description	text	100	Description for Home state of Employee
Supervisor.EmployeeNumber	text	20	Employee Number for Supervisor of Employee
UDF1	text	60	UDF1 of Employee
UDF2	text	60	UDF2 of Employee
UDF3	text	60	UDF3 of Employee
UDF4	text	60	UDF4 of Employee
UDF5	text	60	UDF5 of Employee
Union.Code	text	20	Code for Union of Employee
Union.Description	text	100	Description for Union of Employee
WorkExtension	text	10	Work extension of Employee
WorkPhone	text	24	Work phone of Employee
WorkStatus.Code	text	20	Code for Work status of Employee
WorkStatus.Description	text	100	Description for Work status of Employee

Using a Custom MEIP Client

It is possible to write your own import client instead of using the client provided by Medgate.

The MEIP client provided imports records into Medgate via the MEIP Web Service which is available to use in your own custom clients.

Please refer to the MEIP Web Service API for more details.

How to Access the MEIP Web Service

You can determine the URL of your MEIP web service by looking at your login URL.

For example if your login URL is:

https://dev.medgate.com/gx/security/login.rails

Then your MEIP Web Service URL would be:

https://dev.medgate.com/gx/WebService/MEIPService.svc

MEIP Web Service API

Methods	
string	Import(byte[] data, string importFormat, string dateFormat, bool ignoreIncorrectNumFields, bool disableHEGUpdate, bool updateBaseTableDescriptions, string username, string password, bool updateExistingRecords, bool insertNonExistingBaseTableValues, bool mergeRecordsMatchingSSN) This is the main method for the Medgate Employee Import web service. Calling this method will begin the import process. This is a synchronous call, so it will block until the import process is complete. Parameters: byte[] data – This is the data to be imported. The import file should be a comma delimited text file with one record per line. The file should be read into a byte array and then compressed into a gzip stream for upload. string importFormat – A comma delimited list of fields representing the format of the import file. If this is blank then the import format is read from the database. string dateFormat – The date format used in the import file. bool ignoreIncorrectNumFields – Flag to ignore mismatching number of fields between the import format and import file. If true, extra fields in the import file are ignored and missing fields from the import file are treated as null. bool disableHEGUpdate – If true, the auto linking of surveillance groups will not be updated. bool updateBaseTableDescriptions – If true and descriptions for a base table are included in the import file, the descriptions in the database will be updated even if the base table code already exists in the table. If false and the base table already contains the code, the description will not be updated. The description from the import file is always used when creating a new base table record. string username – The username to login as for the import. string password – The password to login with for the import. bool updateExistingRecords – If true, existing records

	will be updated with the new data.
	`bool` insertNonExistingBasetablevalues – If true, non-
	    existing base table entries will be created.
	`bool` mergeRecordsMatchingSSN – If true, employee records
	    will be matched by SSN instead of employee number.
	
	Return Value:
	Returns a string representing the import log containg
	    details of the performed import.

`IAsyncResult`	`BeginImport(`byte`[] rawData, `string` importFormat, `string`     dateFormat, `bool` ignoreIncorrectNumFields, `bool`     disableHEGUpdate, `bool` updateBaseTableDescriptions,     `string` username, `string` password, `bool`     updateExistingRecords, `bool`     insertNonExistingBaseTableValues, `bool`     mergeRecordsMatchingSSN, `AsyncCallback` callback,     `object` state)` This is similar to the Import() method except that it is an asynchronous call. It will return immediately when called and not wait for the import process to complete. The parameters are the same as the Import() method except for two additional parameters. Parameters: `AsyncCallback` callback – This is the call back method that is invoked when the import process has completed. `object` state – This parameter is not used. Return Value: Returns a `MEIPAsyncResult` object used to manage the asynchronous call.

`string`	`EndImport(`IAsyncResult` asyncResult)`
	
	This should be called once the BeginImport() asynchronous
	    call has completed.
	
	Parameters:
	`IAsyncResult` asyncResult – This should be the `IAsyncResult`
	    object received through the call back method when the
	    BeginImport() method completed.
	
	Return Value:
	A string containing a log of the import process.

`IAsyncResult`	`BeginAbortImport(`string` url, `AsyncCallback` callback,     `object` state)` Abort the current running import process. Parameters: `string` url – The URL of the web service to which you are connecting. `AsyncCallback` callback – This is the call back method that is invoked when the abort attempt has completed.

	`object` state – This parameter is not used. Return Value: Returns a `MEIPAbortImportAsyncResult` object used to manage the asynchronous call.
`bool`	`EndAbortImport(IAsyncResult asyncResult)` This should be called once the BeginAbortImport() asynchronous call has completed. Parameters: `IAsyncResult` asyncResult – This should be the `IAsyncResult` object received through the call back method when the BeginAbortImport() method completed. Return Value: A bool indicating whether the abort call was successful.