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- Software Architecture, Design and Development
- Web-based Database Solutions
- All Aspects of Database Design and Maintenance

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## Csv2Dex – User Manual

### Overview

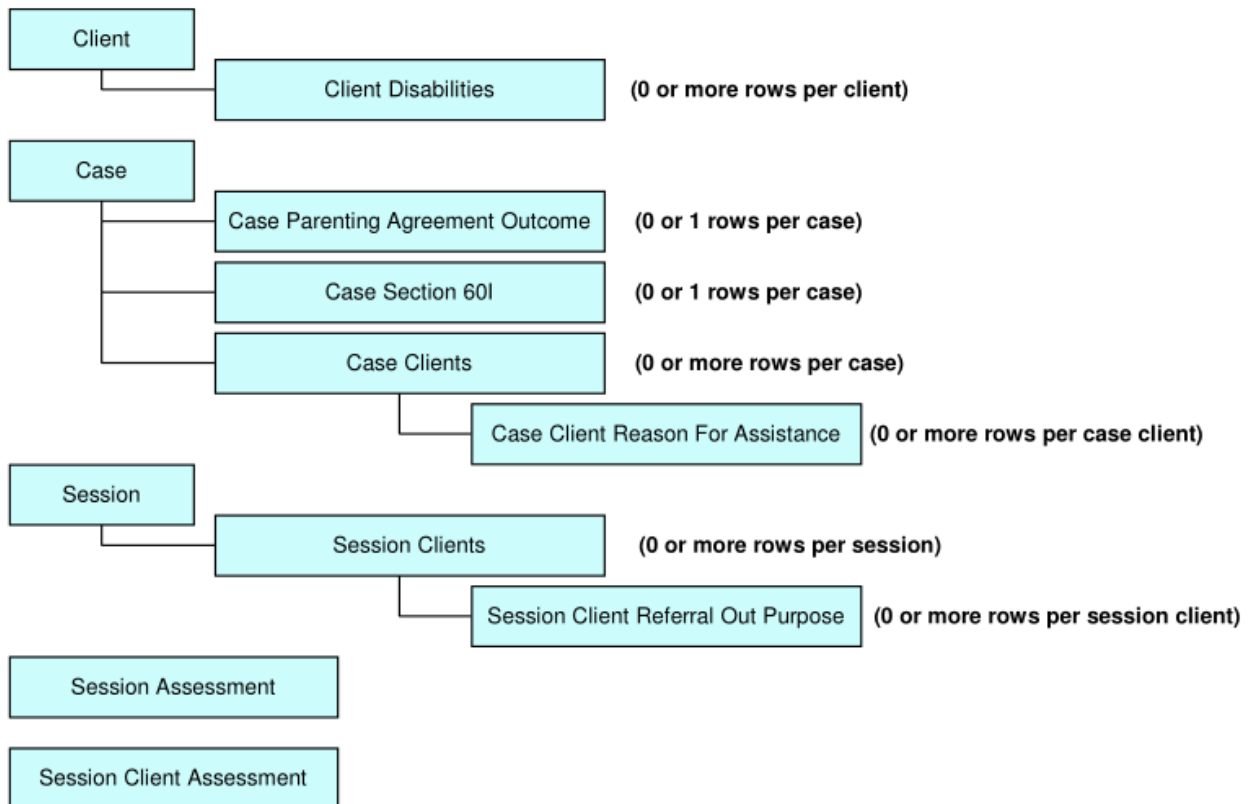
As of Jan 31st 2016 all DSS-funded organisations in Australia are required to submit project data regarding clients, cases, sessions and assessments through the DSS Data Exchange portal, using either the Bulk Upload (XML) or Web Services model.

The Csv2Dec program converts multiple CSV files to a single XML file for upload, or alternatively uploads the data directly to the portal via web services.

It should be an easy matter to export the required information in CSV format from any social services management software (for example Communicare, PCIS, MedicalDirector or BestPractice).

An XML file is a convenient way of wrapping up a package of related data into a unit. Because CSV files store just a single set of data (a lot like a single sheet of an Excel spreadsheet), to express different sets of related data in CSV form, multiple files must be used.

The following diagram expresses the different sets of data accepted by DEX. Each blue box represents a set of data, and Csv2Dex will accept a CSV file for each.



The items of data expected in each data set are listed in Appendix 1. They are essentially the same as covered in the DSS documentation for the Web Services and Bulk Upload.



## Installation and Setup

Please follow the installation procedure in Appendix 2.

## Configuration and Import Tool

This is the main screen of the configuration tool, which is an unprotected Microsoft Access application. All set up and configuration of CSV templates can be achieved with the two buttons at top left.

'Programs' allows the DSS funded programs for your org to be entered, as a program name and associated DSS program codes.

**Csv2Dex - [Main Menu]**

File Edit View Insert Format Records Tools Window Help

Type a question for help

### Csv2Dex - File Importer

ver 1.000 (000)

**Set up ...**

- Programs
- File Templates
- Reference Codes
- Assessment Codes
- Outlet Codes

**Import ...**

- Current Bundles
- View History

Quit Database

Database Admin

Form View NUM



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The 'File Templates' screen allows you to set up the mapping of data from your CSV files to the DEX datasets.

Each data item in the DEX dataset must be matched to either a field in the CSV file, a constant value which you may enter (eg. 'yes', 'no', '0') or marked 'None' to ignore the field.

### Template Information

Each of these Templates matches an import CSV file layout to the DEX predefined data items.

Program	Template	Template Type
Sample FS	Client Details	Client
Sample FS	Client Disabilities	Client Disability
Sample FS	Case Details	Case
Sample FS	Case Clients	Case Client
Sample FS	Case Section 60I	Case Section 60I
Sample FS	Case Parenting Agreement Outcome	Case Parenting Agreement Outcome
Sample FS	Case Reason For Assistance	Case Client Reason For Assistance
Sample FS	Session	Session

Save Cancel New Delete

Template Details **Template Members**

Match CSV	Value	DEX Item	Type	Required	Order
Field 1		Client_ID	Text	Yes	1
Field 9		SLK	Text	Consent to Provide Details	2
Field 8		ConsentToProvideDetails	True/False	Yes	3
Constant	Yes	ConsentedForFutureContacts	True/False	Consent to Provide Details	4
Field 2		GivenName	Text	Consent to Provide Details	5
Field 3		FamilyName	Text	Consent to Provide Details	6
Constant	No	IsPseudonym	True/False	Yes	7
Constant	No	IsBirthDateAnEstimate	True/False	Yes	8
Field 6		BirthDate	Date	Yes	9
Field 4		GenderCode	Text	Yes	10
Field 10		ResidentialAddressLine1	Text	No	11
None		ResidentialAddressLine2	Text	No	12
Field 11		ResidentialSuburb	Text	Yes	13
Field 12		ResidentialState	Text	Yes	14
Field 13		ResidentialPostcode	Text	Yes	15
Constant	1101	CountryOfBirthCode	Text	Yes	16
Constant	8998	LanguageSpokenAtHomeCode	Text	Yes	17
Constant	ABORIGINAL	AboriginalOrTorresStraitIslanderOriginCode	Text	Yes	18
Field 7		HasDisabilities	True/False	Yes	19



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Once the CSV mappings are complete, you can create a new 'Bundle', which is just a set of files (for example, a reporting period) to be converted to XML.

You can add one file per DEX template type to the bundle. When you add it, it will be processed and checked for integrity.

If there are problems, you can replace it with a newer version or just remove it from the bundle.

**Bundle Information**
Back

Program	Bundle	Status
Sample FS	Test DEC Upload	In Progress

Save Cancel New Delete

Bundle Details Bundle Files Unmatched Code Lookups Upload Attempts

File TemplateAdd/Replace File ...

CSV File data to be uploaded
Remove File

Template Type	File Name	Imported	Template
Client	TestData_Client.csv	16/01/16 21:11	Client Details
Client Disability	TestData_ClientDisability.csv	14/01/16 22:37	Client Disabilities
Case	TestData_Case.csv	31/12/15 10:38	Case Details
Case Client	TestData_CaseClient.csv	31/12/15 10:38	Case Clients
Case Section 60I	TestData_Case60I.csv	31/12/15 10:39	Case Section 60I
Case Parenting Agreement O	TestData_CaseParAgree.csv	31/12/15 10:39	Case Parenting Agreement Outcome
Case Client Reason For Assis	TestData_CaseClientReason.csv	31/12/15 10:39	Case Reason For Assistance
Session	TestData_Session.csv	31/12/15 10:39	Session
Session Client	TestData_SessionClient.csv	31/12/15 10:39	Session Client
Session Client Referral Out P	TestData_SessionClientRefOut.c	31/12/15 10:39	Session Client Referral Out Purpose



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Once some bundle files have been imported, the tool will check to make sure that the lookup values passed for lookup fields match the DEX lookup values.

If not, the 'Unmatched Code Lookups' allows you to match a DEX value to the lookup values coming in from your management software. This value is retained for use with future bundles (but only within the same program).

### Bundle Information Back

Program	Bundle	Status
Sample FS	Test DEC Upload	In Progress

Save Cancel New Delete

Bundle Details Bundle Files **Unmatched Code Lookups** Upload Attempts

Show matched values as well (matches may also be added/edited using the 'Reference Code' screen from the Main Menu)

Lookup Type	External Value	Match to DEX Value
Gender	F	Female
Gender	M	Male
Reason For Assistance	CC_Education	Education / employment
Reason For Assistance	CC_family	Family functioning
Reason For Assistance	CC_Housing	Housing
▶ Referral Purpose	CC_EDUCEMPL	Employment, education and training
Referral Source	CC_education	Age-appropriate development
Referral Source	CC_family	Community participation and networks
		Employment, education and training
		Family functioning
		Housing
		Material wellbeing
		Mental health wellbeing and self-care
		Money management
		Personal and family safety
		Physical health
		Support to caring role
		Other



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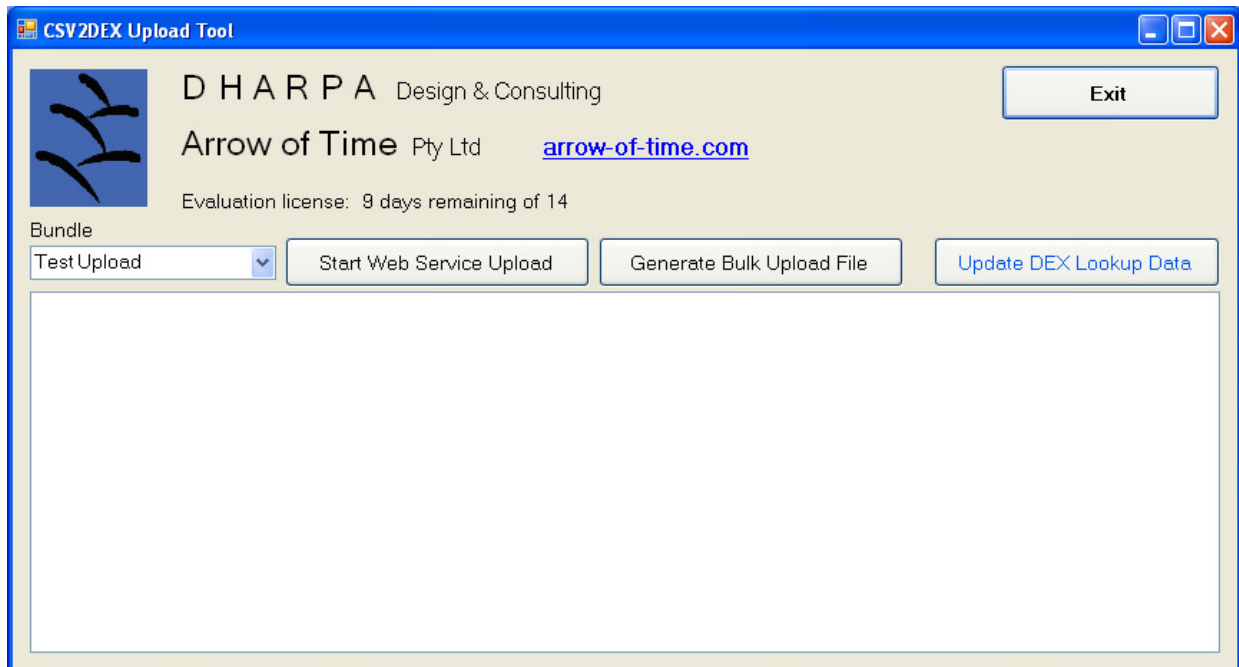
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## Web Services Upload or XML Generation

The final stage of either (a) Web Services Upload, or (b) XML generation, is done by a separate tool. This tool is copy protected and must be registered before use. A license may be purchased from the website. The tool can run in two modes:

**GUI mode** brings up a window allowing a pending bundle to be selected from a drop down, and processed by clicking a command button. GUI mode is shown below:



**Command line mode** allows the program to be run by entering a command at the windows command prompt, or by running a command shell from another program (such as MS Access).

```
C:\WINDOWS\system32\cmd.exe
C:\Program Files\DDC\Csv2Dex\bin>DexUploadConsole.exe -bundle_id=1 -output_mode=
xml
Csv2Dex Console v1.0
9 Feb 2016 09:38:54
Bundle inter-file dependencies check OK
Bundle template required field check OK
Starting automated data check
Completed automated data check
Completed check of conditionally required data
Client records processed
Case records processed
Session records processed
Session Assessment records processed
Client Assessment records processed
Removing previous history for this bundle
Starting store data history to database
Completed store data history to database
wrote XML to file 'xmlOut_Bundle1.xml'
C:\Program Files\DDC\Csv2Dex\bin>
```



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Running the command-line tool without any parameters lists the command line options.

<code>-bundle_id=[int]</code>	the integer bundle id from the Access Csv2Dex database
<code>-output_mode=[xml/web]</code>	output an XML file for bulk upload, or direct upload to DEX via web services
<code>-output_file="[path]"</code>	path and optionally filename for output file, if omitted use the path listed in config file, or if that is omitted use the current path. A filename will be generated automatically if not supplied.
<code>-sync_lookups</code>	sync the lookup values in the Access database with the DEX portal using Web Services
<code>-debug</code>	print parameter values prior to processing, then pause and wait for a key after processing



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## Appendix 1: Dataset Data Item List

### Dataset: Client

Data Item	Required	Type	Lookup
Client_ID	Y	Text(30)	-
SLK	*	Text(14)	-
ConsentToProvideDetails	Y	True/False	-
ConsentedForFutureContacts	*	True/False	-
GivenName	*	Text(30)	-
FamilyName	*	Text(30)	-
IsPseudonym	Y	True/False	-
IsBirthDateAnEstimate	Y	True/False	-
BirthDate	Y	Date	-
GenderCode	Y	Text(20)	Gender
ResidentialAddressLine1	N	Text(180)	-
ResidentialAddressLine2	N	Text(180)	-
ResidentialSuburb	Y	Text(50)	-
ResidentialState	Y	Text(3)	State
ResidentialPostcode	Y	Text(4)	-
CountryOfBirthCode	Y	Text(20)	Country
LanguageSpokenAtHomeCode	Y	Text(20)	Language
AboriginalOrTorresStraitIslanderOriginCode	Y	Text(20)	ATSI Origin
HasDisabilities	Y	True/False	-
IsHomeless	N	True/False	-
HouseholdCompositionCode	N	Text(20)	Household Composition
MainSourceOfIncomeCode	N	Text(20)	Main Source Of Income
IncomeFrequencyCode	N	Text(20)	Income Frequency
IncomeAmount	N	Integer	-
FirstArrivalMonth	N	Text(20)	Month
FirstArrivalYear	N	Integer	-
MigrationVisaCategoryCode	N	Text(20)	Migration Visa Category
AncestryCode	N	Text(20)	Ancestry

#### Business Rules:

- if ConsentToProvideDetails is 'No' then, SLK is required but other starred items should be omitted
- if ConsentToProvideDetails is 'Yes' then, SLK may be omitted but other starred items are required.
- if HasDisabilities is 'Yes' then the Client Disabilities dataset must be included and contain disability records for that client

### Dataset: Client Disability

Data Item	Required	Type	Lookup
Client_ID	Y	Text(30)	-
DisabilityCode	Y	Text(20)	Disability





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**Dataset: Case**

Data Item	Required	Type	Lookup
Case_ID	Y	Text(30)	-
TotalNumberOfUnidentifiedClients	Y	Integer	-
OutletActivityId	Y	Integer	-

**Dataset: Case Client**

Data Item	Required	Type	Lookup
Case_ID	Y	Text(30)	-
Client_ID	Y	Text(30)	-
ReferralSourceCode	Y	Text(20)	Referral Source

**Dataset: Case Section 60I**

Data Item	Required	Type	Lookup
Case_ID	Y	Text(30)	-
Section60ITypeCode	Y	Text(50)	Section 60I Certificate Type
DateIssued	Y	Date	-

**Dataset: Case Parenting Agreement Outcome**

Data Item	Required	Type	Lookup
Case_ID	Y	Text(30)	-
ParentingAgreementOutcomeCode	Y	Text(20)	Parenting Agreement
DateOfParentingAgreement	Y	Date	-
DidLegalPractitionerAssistWithFormalisingAgreement	Y	True/False	-

**Dataset: Case Client Reason For Assistance**

Data Item	Required	Type	Lookup
Case_ID	Y	Text(30)	-
Client_ID	Y	Text(30)	-
AssistanceNeededCode	Y	Text(20)	Reason For Assistance
IsPrimary	Y	True/False	-



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**Dataset: Session**

Data Item	Required	Type	Lookup
Case_ID	Y	Text(30)	-
Session_ID	Y	Text(30)	-
SessionDate	Y	Date	-
ServiceTypeId	Y	Integer	-
TotalNumberOfUnidentifiedClients	Y	Integer	-
FeesCharged	N	Decimal	-
MoneyBusinessCommunityEducationWorkshop Code	N	Text(20)	Money Business Community Education Workshop
InterpreterPresent	N	True/False	-

**Dataset: Session Client**

Data Item	Required	Type	Lookup
Case_ID	Y	Text(30)	-
Session_ID	Y	Text(30)	-
Client_ID	Y	Text(30)	-
ParticipationTypeCode	Y	Text(20)	Participation Type

**Dataset: Session Client Referral Out Purpose**

Data Item	Required	Type	Lookup
Case_ID	Y	Text(30)	-
Session_ID	Y	Text(30)	-
Client_ID	Y	Text(30)	-
ReferralTypeCode	Y	Text(20)	Referral Type
PurposeCode	Y	Text(20)	Referral Purpose

**Dataset: Session Assessment**

Data Item	Required	Type	Lookup
Case_ID	Y	Text(30)	-
Session_ID	Y	Text(30)	-
AssessmentPhaseCode	Y	Text(20)	Assessment Phase
ScoreTypeCode	Y	Text(20)	Assessment Score Type
ScoreCode	Y	Text(20)	Assessment Domain Score

**Dataset: Session Client Assessment**

Data Item	Required	Type	Lookup
Case_ID	Y	Text(30)	-
Session_ID	Y	Text(30)	-
Client_ID	Y	Text(30)	-
AssessmentPhaseCode	Y	Text(20)	Assessment Phase
ScoreTypeCode	Y	Text(20)	Assessment Score Type
ScoreCode	Y	Text(50)	Assessment Domain Score



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## Appendix 2: Installation and Setup of Csv2Dex

Installation is simply a matter of downloading the install bundle, extracting it, and running Setup.exe. Installation is by default to the folder: C:\Program Files (x86)\DDC\Csv2Dex\

To run the Configuration tool, use the first shortcut ('1 – Csv2Dex Configuration'), from the start menu Csv2Dex group or from the desktop. The generation tool is the second shortcut from the same locations.

### Licensing and Web Services – The Settings File

Each version of the Upload/Generator tool has a settings file.

Console generator program:	DexUploadConsole.exe
Console generator settings file:	DexUploadConsole.exe.config
GUI generator program:	DexUploadGUI.exe
GUI generator settings file:	DexUploadGUI.exe.config

(See the screenshot below for a complete list of release files).

The relevant parts of the settings files are:

```
<appSettings>
  <add key="DexClientUserName" value="DEX_USERNAME" />
  <add key="DexClientPassword" value="DEX_PASSWORD" />
  <add key="RegistrationCode" value="CSV2DEX_REGISTRATION_CODE" />
  <add key="RegistrationOwner" value="CSV2DEX_REGISTERED_USER" />
  <add key="RegistrationEmail" value="CSV2DEX_REGISTERED_EMAIL" />
</appSettings>
<system.serviceModel>
  <client>
    <endpoint address="DEX_WEB_SERVICE_ADDRESS" binding="customBinding" />
  </client>
</system.serviceModel>
```

If a license is purchased from arrow-of-time.com, or an evaluation license is issued by sales, then the license information must be entered into the relevant settings file into the areas in blue. The registered user and email are from the arrow-of-time user account. The registration code is obtained through the process of securing a license.

The yellow items are for the DEX web services credentials to be entered.

These are only needed if your organisation requires synchronisation of the Lookup lists and automatic upload of data via web services (generating XML is easier because it does not require access to the DEX site).

These credentials will be issued to the organisation by DEX after a testing phase has been completed using the DEX test site and test credentials (available from DEX).



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Below is a list of all the files released as part of the Csv2Dex package:

Program Files

- DDC
  - Csv2Dex
    - 1 - Csv2Dex Configuration
    - 2 - Csv2Dex Generator
    - Update to Latest Version
    - bin
      - Logs
      - Csv2Dex.mdb ← Configuration tool (shortcut 1 points here)
      - Csv2Dex\_Data2.mdb | ← Data stores for configuration tool
      - Csv2Dex\_Data.mdb
      - DexDal.DLL
      - DexProcess.DLL
      - DexUploadConsole.exe ← Console generator program
      - DexUploadConsole.exe.config ← Console generator settings file
      - DexUploadGUI.exe ← GUI generator program (shortcut 2 points here)
      - DexUploadGUI.exe.config ← GUI generator settings file
      - FileUpdate.exe ← Update program ('update' shortcut points here)
      - FileUpdate.exe.config
      - Ionic.Zip.DLL
      - Lib.DLL
      - LogicNP.Cryptolicensing.Gen...
    - TestData
      - TestData\_Case60I.csv
      - TestData\_Case.csv
      - TestData\_CaseClient.csv
      - TestData\_CaseClientReason.csv
      - TestData\_CaseParAgree.csv
      - TestData\_Client.csv
      - TestData\_ClientDisability.csv
      - TestData\_Session.csv
      - TestData\_SessionAssess.csv
      - TestData\_SessionClient.csv
      - TestData\_SessionClientAssess.csv
      - TestData\_SessionClientRefOut.csv

Shortcuts to programs

Test Data (can be used to test-drive system)