



# WEB SERVICE FORM UPLOAD

## User Guide

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## 1. Overview

This document is a guide to uploading forms and patient data as an XML file using the web service. The user does not need to be logged into the registry application to do this.

## 2. File Upload

Please ensure the upload file name is as follows:

- less than 200 characters
- uses the extension .Xml
- Includes date and time within the name (to ensure it is unique for the location).

```
e.g. 'myfilename_2020-03-31_13-21.xml'
```

The schema for the data is named Import.Xsd and available as a separate file to this guide.

Files should be uploaded via SSH File Transfer Protocol (SFTP) using a suitable client, such as Filezilla (see example below). Once uploaded the patients and forms within the file are processed.

Patients records will be updated if a matching MRN is found otherwise a new one will be created - and the forms added to new cases for each patient. The results are written to a log file that can be downloaded from the server via SFTP.

## 3. User Accounts

To be able to upload files each user must first be setup on the server and associated with one or more folders matching the clinic or department name where the patient and form data are to be loaded.

These accounts and folders must be created by notifying the helpdesk of the usernames and



locations they wish to be associated with.

- For users outside Switzerland write to: health\_servicedesk@necsws.com
- For users in Switzerland write to: siris-spine@eurospine.org

The user can also access the registry application online. This is recommended but not mandatory for using the web service.

The helpdesk will provide the user with the username and password, as well as

- the hyperlink <u>ssh01.northgatehealth.com</u> and
- SSH port number: 22

### 4. Clinic or Department Folders

Separate sub folders for each location are used to define the current state of the data and the upload outcome, for example:



- Users should upload files to the ReadyToProcess folder.
- A process running on the server will automatically move uploaded files to the **Pending** folder.
- After processing, the data is moved to the **'NotImported'**, **'InComplete'** or **'Complete'** folders, depending on the result.
- A log file matching the upload filename with **.Import.Log** appended will be written to the same folder. This log is a simple text file listing the status of patients, cases, forms and validation messages.

Note that only those locations configured with the 'R4ST Data Entry - Web Service' capability can be used to upload data.

#### 5. Filezilla SFTP Client

The Filezilla client may be downloaded from https://filezilla-project.org/

Once installed, connect to the server with the connection details provided. Enter the host address, username, password and port then click 'Quickconnect'.





E	FileZilla	_ 🗆 X
File Edit View Transfer Server Bookmarks Help New version	n available!	
·····································		
Host: Username: Passwor	d: Port: Quickconnect v	
		~
Local site: C\_R4ST Form Data\	Remote der	· · ·
	(Remote site)	~
i 🕂 🖕 C		
SRecycle.Bin R4ST Form Data		
riename r		
ExampleAccountName-Neck COMI-2091-11-14_10-10.xml		
	Filename Filesize Filetype Last modified Permissions Owner/Gro	
	Not connected to any server	
< III >		
1 file. Total size: 6,155 bytes	Not connected.	
Server/Local file Direction Remote file	Size Priority Status	
Queued files Failed transfers Successful transfers		
	Queue: empty	r 🔍 🔍 📑

If the connection details are valid the folder locations the user has access to will be displayed. Example below:

E sftp:	//ExampleAccountName@ FileZilla	_ 🗆 X				
File Edit View Transfer Server Bookmarks Help New version	n available!					
₩- ■■■=== 0 # 0 1, 1/ = 0, 9	8					
Host: sftp:// . Username: npleAccountName Password	t: ••••••• Port: Quickconnect 👻					
Status:     Directory listing of "/Department B/Pending" successful       Status:     Retrieving directory listing of "/Department B/ReadyToProc       Status:     Listing directory /Department B/ReadyToProcess       Status:     Directory listing of "/Department B/ReadyToProcess       Status:     Directory listing of "/Department B/ReadyToProcess	sss"	~ ~				
Local site: C:\_R4ST Form Data\ 🗸 🗸 🗸	Remote site: /Department B/ReadyToProcess	~				
Filename	Image: Complete Image: Complete   Image: Complete Image: Complete					
	Empty directory listing					
< III >						
1 file. Total size: 6,155 bytes	Empty directory.					
Server/Local file Direction Remote file	Size Priority Status					
Queued files   Failed transfers   Successful transfers						
	🔒 🕅 Queue: e	mpty 🔍 🔍 🚬				

Note the Host name shown in the window title bar and the Host: section have been hidden.

The example shows user '**ExampleAccountName**' having successfully connected to the server. This user is associated with two locations – 'Clinic A' and 'Department B' as shown in the folder listing under the 'Remote site:' section on the right.

To upload a file, browse to the folder within the 'Local site' section on the left and select the



filename from those listed, then drag it to the 'ReadyToProcess' folder of the clinic or department where the data is to be loaded. Example as follows:

5ftp://ExampleAccountName@	_ <b>D</b> X		
File Edit View Transfer Server Bookmarks Help New version available!			
Host: [sftp://* ******* Username: npleAccountName Password: ••••••• Port: Quickconnect V			
Status:     Listing directory /Department B/ReadyToProcess       Status:     Directory listing of "/Department B/ReadyToProcess" successful       Status:     Disconnected from server	×		
Local site: C:\_R4ST Form Data\ v Remote site: /Department B/ReadyToProcess	Υ.		
Filename ExampleAccountName-Neck COMI-2091-11-14_10-10.xml			
Filename Filesize	e Filetype		
ExampleAccountName-Neck COMI-2091-11-14_10-10.xml 6,155	5 XML File		
	>		
Selected 1 file. Total size: 6,155 bytes 1 file. Total size: 6,155 bytes			
Server/Local file Direction Remote file			
stp://ExampleAccountName@			
C:\_R4SI Form Data\ExampleAccountName-Neck COMI-2091-11-14_10-10.xml>> /Department B/ReadyToProcess/ExampleAccount	Name-Neck COMI-2091-11-14		
K	>		
Queued files Failed transfers Successful transfers (1)			
<u>∩</u> 0	Queue: empty		

The file 'ExampleAccountName-Neck COMI-2091-11-14\_10-10.xml' has been uploaded to the

ReadyToProcess folder of 'Department B'.

The tabs at the bottom of the window show the file transfer details -

- files queued for upload,
- files successfully transferred
- any files that have failed.

Note that the file on the 'Local site:' still remains.

If the file was processed successfully, it would be moved to the Complete folder with a related log file containing the outcome details. Example as follows:





5ftp;	//ExampleAccountName@		_ <b>_</b> ×					
File Edit View Transfer Server Bookmarks Help New version	n available!							
Host: sftp:// . Username: npleAccountName Password	t: Port: Quickconnect V							
Status:     Retrieving directory listing of "/Department B/Complete"       Status:     Listing directory /Department B/Complete       Status:     Directory listing of "/Department B/Complete" successful								
Local site: C:\_R4ST Form Data\ 🗸	Remote site: /Department B/Complete			~				
Filename Fi ExampleAccountName-Neck COMI-2091-11-14_10-10.uml	Clinic A Complete Notimported Pending ReadyToProcess Department B Complete Notimported Pending ReadyToProcess							
	Filename	Filesize	Filetype	-				
	ExampleAccountName-Neck COMI-2091-11-14 10-10.xml	6.155	XML File					
	ExampleAccountName-Neck COMI-2091-11-14_10-10.xml.Import.Log	644	Text Document					
< III >	<			>				
Selected 1 file. Total size: 6,155 bytes	2 files. Total size: 6,799 bytes							
Server/Local file	Direction Remote file		Size Priority Status					
<	m			>				
Queued files Failed transfers Successful transfers (1)								
		<u>^</u> 0	) Queue: empty 🛛 📦 🥥					

## 6. To open the log file

Select 'View/Edit' on the popup menu when right-clicking the selected file.

It is also possible to drag the file to a folder selected within the 'Local site:' section (note: dragging a file may require the user to re-enter their password on the first download).