

Transcript for GPMS – Data Upload

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Transcript

0:03

This video provides an overview on how to do a bulk data upload.
The Data Upload section is for grantees who are migrating to the GPMS system.

0:14

When you're logged in, navigate to the Data tab.
You'll be taken to this page here.
We'll focus on the Data Upload section.

0:25

In this section there are three steps.
Steps one data validation, step two data upload, and step three supplemental data upload.

0:36

We'll start with step one, data validation.
In this step, the system will check to see if there are any errors in your data file.
If there are errors, an error report will be generated for you to pinpoint your errors.
For this step, you'll want to use a CSV formatted data file you use to submit to WIPS.

1:05

Here is an example of what your file might look like.

It has the same QPR layout as you would have when you're submitting to WIPS.

1:15

Now let's continue forward with step one.

Click Validate Data File.

Here you can choose to click Upload to select the CSV file, or you can drag and drop and paste the file into the space provided.

Once you have selected your file, you'll want to click Submit, and you'll want to make sure to click Process File.

1:53

Once those steps are done, you'll be taken back to the page you started on.

When you scroll down to Validation History, you'll see that the file you have submitted is currently processing.

Once it's done, you'll either see the status Validation Failed or Validation Completed.

2:15

Let's take a look at a failed attempt by clicking on Validation Failed next to one of the files.

On this page, you'll see which Perl elements and which participant rows you'll need to correct.

There is an error description provided here on the right.

2:39

Let's go back and take a look at the file that we just uploaded.

It looks like it has passed and has a validation completed status.

Let's click on the status and see what it tells us.

2:58

It gives us a summary of the file we just uploaded like the file name, who validated it, and when it was validated.

3:15

Now that we have an error-free file, we can go to step two which is data upload.

You'll see your validated data in this grid area under Schedule Data Upload.

You'll want to click Ready to Schedule.

3:40

Please allow around 72 hours for the system to upload your data to the GPMS system.

3:51

After clicking Ready to Schedule, you'll be taken to this page.

This page explains that certain pearl elements in your data file will be used as default values in the GPMS system.

To continue, you must select the checkbox acknowledging that you understand and accept this.

After you select the checkbox, click Schedule Data Upload.

4:21

Afterwards, click Go Back.

On this page, if you scroll down, you'll see that your data is scheduled to be uploaded.

When the data is fully uploaded, you'll see the status upload complete.

For now, you'll want to return the next day.

4:43

After some time has passed, you can go back and check on the status in step two.

Scroll down to check the status.

Here we see Upload Complete.

5:02

So, if you navigate to All Cases, you should see the participants are now uploaded into the system.

5:14

My example file earlier had three participants, and you can see those three are uploaded here in the first few rows.

5:22

When you're looking at the table right now, you'll see that there is FNU, which stands for first name unknown, and LNU, which stands for last name unknown.

5:33

While you can click each participant to manually update their information, we can actually use supplemental data upload in step three to automatically fill in these fields.

5:46

So, let's begin by going to step three.

5:59

On this page, you'll see some instructions.

The second line here is very important.

There are two things to note.

One is downloading the supplemental applicant template from the resource page, and second is to remove the header row in your template once you're done filling out the template.

6:19

To find the template page, go to the Help tab. Click Resources.

And if you scroll down, you should see it right here, called NFJP Supplemental Data Specifications.

Click and download this template.

6:44

I'll show you what an example of the template looks like.

For the template, in particular, you'll want to know the OBS number and the unique ID from your data file.

6:56

The other fields are for the name, address, and e-mail of your participant.

7:02

This last column here, Assignee Email, is for the person working on the case.

7:08

After you're done filling out the template, remember to delete the header row.

7:13

This file can be saved as an Excel file.

7:21

Before we continue to Step 3, let's take a look at the example I'm going to upload.

I have all the fields.

7:35

Before we continue to step three, let's take a look at my supplemental data file.
I have all the fields filled out for my three participants.

7:49

Now let's go back to step three.

Go to the data tab, supplemental data upload.

Select Upload Supplemental Data File, and choose your file to upload.

Select Submit, and remember to click Process File.

If you scroll down, you'll see that your file is processing.

Once it's done, the status will change to Upload Complete.

8:32

This process will take a little bit of time, so you can come back later.

Since my file is small, I'll press the refresh button to see if it's done.

The process is complete.

8:46

Let's go back to the All Cases page and take a look.

8:54

Here we see that the participant names are now updated to what I had in the supplemental template.

If you click on this participant, we'll see that the information from the template has also populated the other fields, like the address.

And that's the end of the video on how to do a bulk data upload.