Mapping Your Source Data to XML

The XML template file is essentially the XML upload layout file which is saved as a .xml file. Here are some other conventions to remember:

- no column labels are permitted in the Excel record spreadsheet
- all cells in the Excel spreadsheet are text-formatted (not numeric or date)
- the first several cells (columns A, B, C, D and E) of the first row in the Excel spreadsheet are reserved for values for submission type, submitter organization code, submission date, MCI flag, and # of records to be transmitted; records should be batched as either needing an MCI# "Y" or not needing an MCI# "N" - do not mix records
- the client data begins in the F column cell of the first and subsequent rows
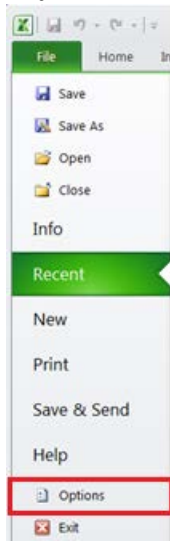- the data columns in the Excel spreadsheet should be in the same order as the XML file fields are ordered

There are 3 steps to this process:
1. Preparing Excel
2. Mapping and Exporting your Excel data
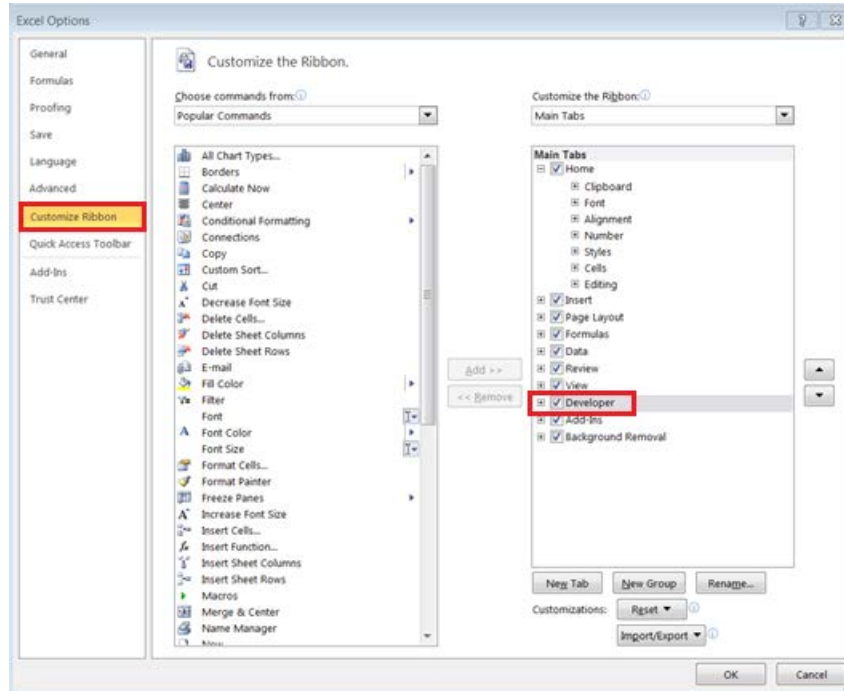3. Final edits in Notepad

1. Preparing Excel in Office 2007 or above

The goal is to add a "Developer" tab in your menu ribbon.
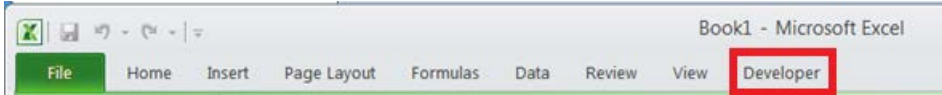In your menu ribbon, select File → Options

- Custom Ribbon. On the far right, check the box for Developer → OK

You will now have the **Developer** tab in your menu ribbon:

2. Mapping and Exporting your Excel data

Save the XML Sample File (Core_XML_Template.XML, AODA_XML_Template.XML, MH_XML_Template.XML) sent to you with these instructions.

Create and format spreadsheet so that it contains the records you want to upload.

- Import or open the text or database file containing the records to upload in Excel and use the file import wizard or copy and paste as appropriate. If you are using 'Import External Data' wizard then do not forgot to uncheck checkbox for 'Save Query definition' in the External Data Range Properties box.
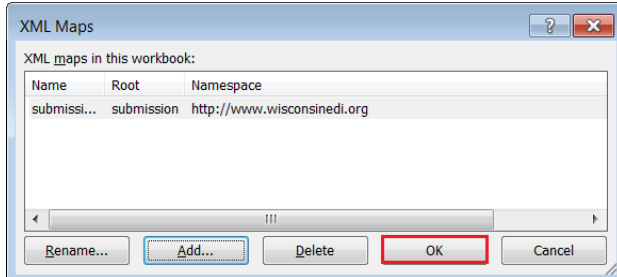
Open your edited Excel data sheet.

In Excel select the **Developer** tab → **Source** button. This will open an **XML Source** pane on the right.

Select the **XML Maps…** button → **Add** button.
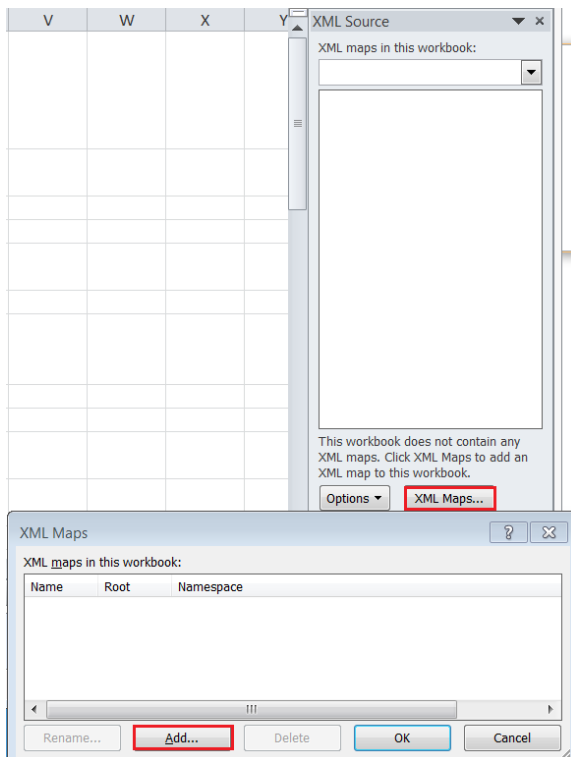
Locate the appropriate XML Sample File (Core_XML_Template.XML, AODA_XML_Template.XML, MH_XML_Template.XML) you just saved, highlight it, and select **Open** (located at bottom of page). You will see a message about a problem with the source. Select **OK** to have Excel create a schema based on the source data. You now have a map. Select **OK**.

Select the **Options** button and verify the two lower boxes are checked for **Automatically Merge Elements When Mapping**.
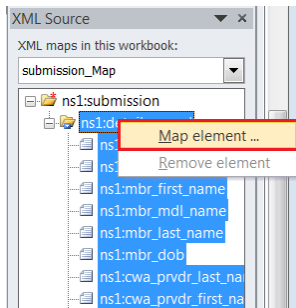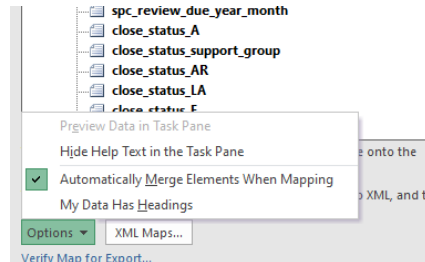
Click on the heading **ns1:detail_record**. It should highlight the details.

Then right-click on the heading and choose Map Element.

Map all the cells that contain data (detail only) e.g (**F2:CF**xx where xx is the row number of your last record). Make sure to update the row to match the last row containing data.
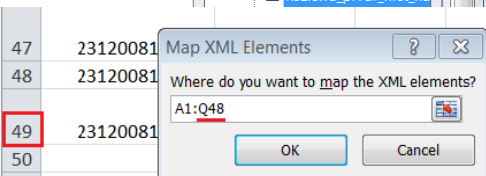
Your data sheet will change color. It will still be editable in case you need to do any last minute edits. When you are ready, you will export the file. Select **OK.** You will see the following:
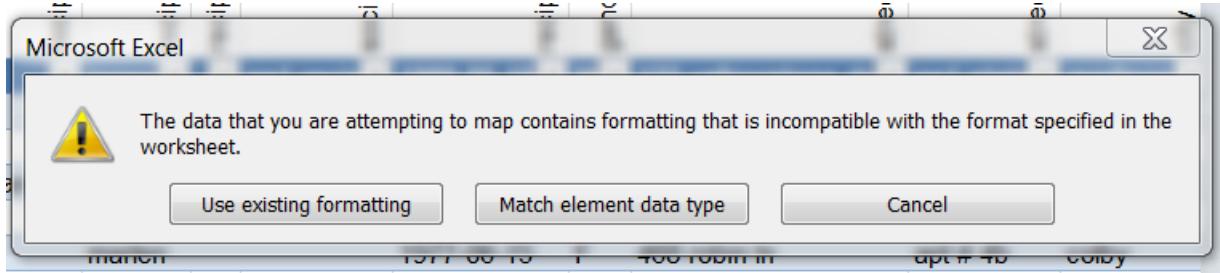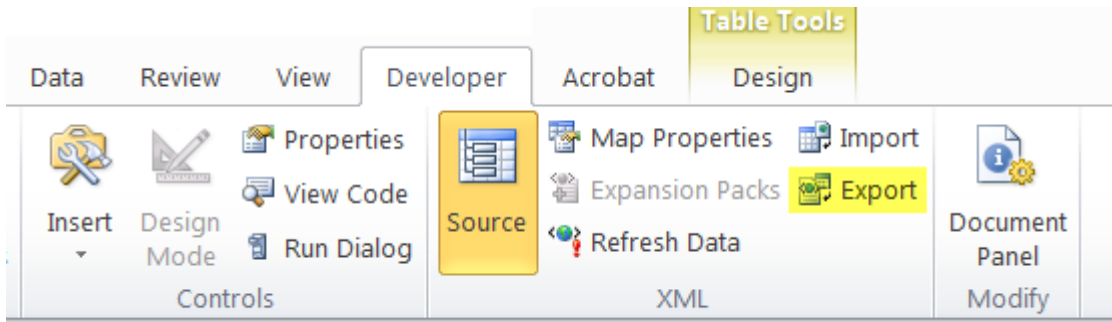
Choose **Match element data type**.

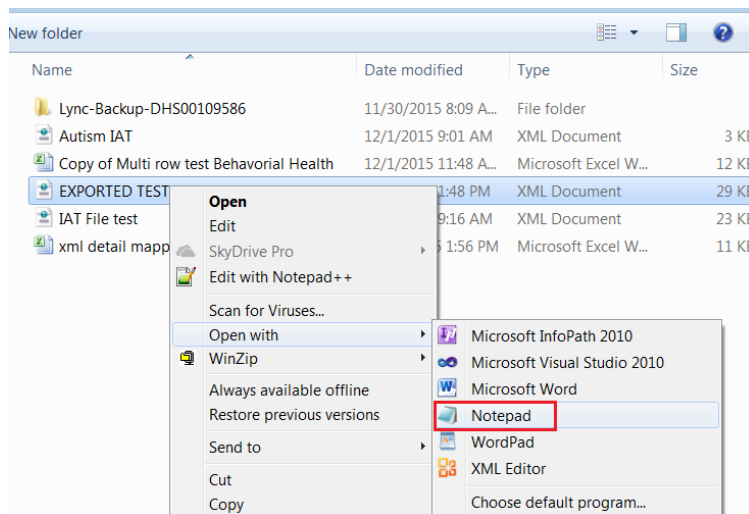Choose the **Developer** tab → **Export** button.

Choose a file name and folder location for your export file (**Program_AgencyID_Date_Time.xml**) e.g. (**MH_109_20120615_0900.xml** or **CORE_109_20120615_0900.xml** or **AODA_109_20120615_0900.xml**)
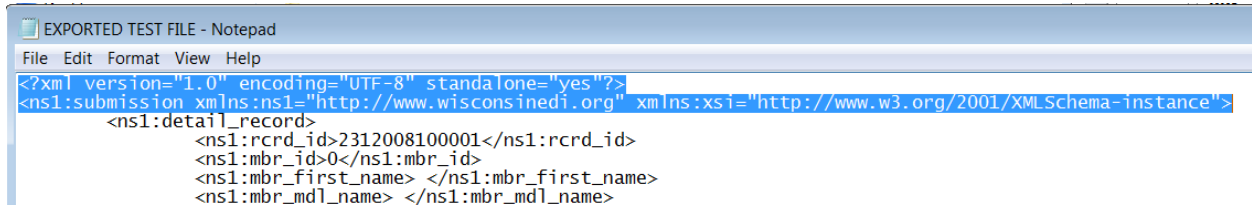
Select **Export**.

3. Final Edits

In Windows Explorer, locate your exported file. **Right-Click → Open With → Notepad**.

Delete the top approximately 2 header and submission rows.

Copy/paste in the header and submission rows from below:

<?xml version="1.0" encoding="UTF-8"?>
<submission xmlns="http://www.wisconsinedi.org"><header_record>
<submitter_organization_id>xxx</submitter_organization_id>
<submission_date>YYYY-MM-DD</submission_date>
<number_of_records_transmitted>x</number_of_records_transmitted>
<mci_flag>Y</mci_flag>
</header_record>

Header Editing:
In the header section between the begin > and </ end tags for each element fill in your:

- Submitter Organization ID (agency ID)
    - EX: <submitter_organization_id>fill in here</submitter_organization_id>
- Submission date (date you are submitting the file)
- Number of records transmitted (The number of detail records which is the count of the number of <detail_record> lines).
- MCI Flag should be 'Y' or 'N' based on whether or not you are trying to obtain the receipt id.

Save the Notepad file: File → Save (do not close the file)

Detail Record Editing:
Click on Edit →   Replace. You'll replace all **<ns1:** with **<**
          then replace all **</ns1:** with **</**
Choose **Replace All** each time. Save the Notepad file: File → Save
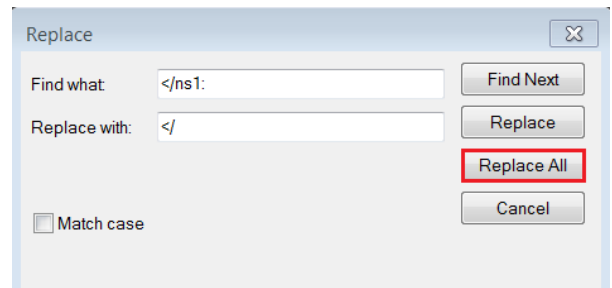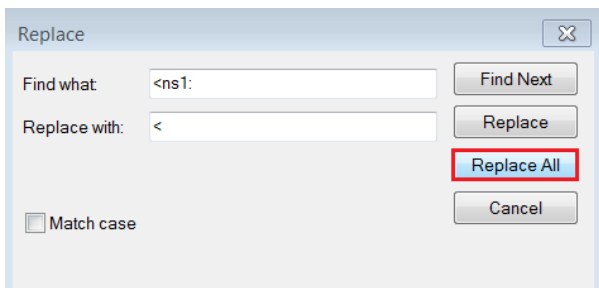
You are now ready to log in to PPS FTP site and submit your xml file.

If you have any questions or problems, please contact the DHS SOS Desk at DHSSOSHelp@dhs.wisconsin.gov.

If you need immediate assistance, you can call the SOS Desk at 608-266-9198.