

Equipment Module – Quick Start Guide – Equipment Bulk Upload

This QSG details how to add new equipment to a warehouse via the Bulk Upload functionality. The Bulk Upload functionality provides a mechanism for adding multiple pieces of new equipment at one time (via an Excel spreadsheet) to any warehouse for which you are the Warehouse Manager.

1) Accessing the Bulk Upload Functionality

Select the “Bulk Upload Equipment” link from the “Equipment” tab. The Bulk Upload page appears. The form at the top of the page (1) is where you specify the file to upload. Beneath the form (2) are some of the rules for bulk upload as well as a link to a blank template you can download and then fill in.

Equipment Bulk Upload

Upload File: (.xls files only)

NOTE: The bulk upload is intended for equipment that already has a model defined in the system. If the equipment is a NEW model then that model must be added to the system using the existing 'Add Model' page prior to using the Bulk upload.

Equipment Bulk Upload Template: [download here](#)

Instructions:

- ONLY '.xls' files are permitted at this time. The new '.xlsx'(Microsoft Excel Workbook 2007) or any other extensions are not supported. For Microsoft Excel 2007 users, please be sure to save your file as Microsoft Excel 97-2003 Workbook (*.xls) before uploading data.
- REQUIRED: Data for Barcode, Model Name/Number, Owner, Warehouse columns is required and cannot be empty.
- REQUIRED: The Model Name/Number must be identical to an existing model already in the system.
- REQUIRED: The System is expecting the following columns in **exact order and names (case-sensitive)** as identified here below. Please exclude any blank spaces around columns.
Barcode, Model Name/Number, Serial Number, Owner, Receipt Date, Warehouse, Warehouse Location, Comment
- FORMATTING: 'Receipt Date' column must be in 'MM/DD/YYYY' format. e.g. 04/30/2010
- You must be part of the respective Warehouse to bulk upload data to it.
- The upload will only continue after all the errors are corrected as identified during bulk upload. No data will be uploaded unless these errors are fixed.
- Please remove any special characters like ~, &, !, %, ', @, #, \$, %, " from the data before uploading. *Note: dashes, parentheses and commas are OK.*

2) Creating an Upload Spreadsheet

You can download a sample template from the Bulk Upload page or you can create one manually in Excel. Each template must contain the following columns with these exact names and in the exact order presented. No special/international characters are permitted in any of the fields with the exception of the dash, comma, or parentheses. [**BOLD** caps = required]

- **BARCODE** – must be unique within entire Equipment module
- **MODEL NAME/NUMBER** – the model must already exist in the Equipment module
- Serial Number - Optional
- **OWNER** – the Owner must already exist in the Equipment module
- Receipt Date – must be in “mm/dd/yyyy” format
- **WAREHOUSE** – the Warehouse must already exist in the Equipment module, currently be active status, and you must be a Warehouse Manager for this warehouse
- Warehouse Location – the Warehouse Location must already exist in the Equipment Module for this warehouse and currently be active status; the field is optional
- Comments – Optional

Once you have filled out the spreadsheet be sure to save it with the “.xls” file extension. Excel 2007 users can save down by going to “Save As” and choosing the “.xls” extension.

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3) Upload the Spreadsheet

1. Click the “Browse” button, select the file from your PC, and then click “Import File”.
2. The system will process the file and then display all the rows you submitted in a table on the screen.

Excel File Data Preview							
BarCode	Model Name/Number	Serial Number	Owner	Receipt Date	Warehouse	Warehouse Location	Comment
1232546-HOU	Dive Compass (no model number)		EPA	12-May-2010	NDT		
4323978-HOU	Evolution 5000 Reciever		Weston	12-Jun-2010	ndt		

3. If there were errors encountered, no equipment will be added and an error warning message will appear above the “Excel File Data Preview” table. The specific errors will be displayed beneath the table. You will be able to identify the row containing the error by the barcode listed.

Errors found
Please correct these data issues below and try again.
An Equipment with BarCode : 1232546-HOU already exists. View Equipment details here (Database ID: 1001234)
User: emp_warehousemgr does not have permission to upload Equipment(BarCode:'4323678-HOU') for Warehouse: HOU

4. If there were no errors, all of the equipment will be added. A confirmation message with a link to each piece of equipment will be displayed beneath the “Excel File Data Preview” table. Click on the “View Equipment details here” link to go to the Equipment Info page for that particular Barcode.

Result
Row with barcode: 1232546-HOU INSERTED SUCCESSFULLY. View Equipment details here (Database ID: 1001234)
Row with barcode: 4323978-HOU INSERTED SUCCESSFULLY. View Equipment details here (Database ID: 1001235)