Equipment Module – Quick Start Guide – Maintenance Info Bulk Upload

This guide details how to add new maintenance logs and schedules to a warehouse via the Bulk Upload functionality. The Bulk Upload functionality provides a mechanism for adding multiple new maintenance logs/schedules 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 Maintenance Logs" link from the "Equipment Service" tab. The Bulk Upload page appears (as seen below). 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.

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. 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 an existing barcode number
- **MAINTENANCE TYPE** – must be an existing maintenance type value
- Maintenance Frequency – must be an existing maintenance frequency value, optional
- **PERFORMED DATE** – must be in "mm/dd/yyyy" format
- **SERVICED BY** – must be "Last_Name First_Name" (the space between Last Name and First Name is required)
- Service Org – must be an existing service organization value, required if Service Invoice Number is provided; otherwise optional
- Service Invoice Number – must be an existing service invoice number, required if Service Org is provided; otherwise optional
- Comments – Optional

NOTE: The spreadsheet export from a Maintenance Schedule search **CAN** be used for a bulk upload provided that several columns are added, so that the above fields are included. The following columns can be added: Serviced By, Cost, Service Org, Service Invoice Number, Comments.

Maintenance Type/Frequency Combination
- If the Frequency field is left blank, the record will be considered unscheduled maintenance
- If the Type/Frequency combo matches an existing maintenance schedule, the record will considered scheduled maintenance. If more than one schedule exists with the Type/Frequency combination, you will have to manually enter this log later.
- If the Type/Frequency combo does not match an existing maintenance schedule, the system will create a new maintenance schedule with the supplied Type/Frequency and auto-calculate the Due Date using the Performed Date + the standard due date number associated with the Frequency value.

Service Org/Invoice Number Combination
If you supply the Service Org, you must supply the Service Invoice Number and vice versa. The combination of both must already exist in the system. If the combination exists more than once in the system, you will have to manually enter this information through the Maintenance Log screens later.

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.

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	Maint. Type	Maint. Freq.	Performed Date	Serviced By	Cost	Service Org	Service Invoice Number	Comment
903012	Warehouse Calibration	After Use	02-Oct-2010	Sharma,Amit	10.0			
903012	Repair		02-Oct-2010	Sharma,Amit	50.0			

3. If there were errors, 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.

User: asharma does not have permission to upload Equipment(Barcode:'903012 ') for Warehouse: HOU

Maint. Freq.:'After Use' for Barcode: '903012 ' does not exist.

User: asharma does not have permission to upload Equipment(Barcode:'903012 ') 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

Maintenance Log added successfully for Barcode: 'NDT-571-0'. View Log details here. Note: Inserting this log entry involved creating a new Maintenance Schedule . View Schedule details here

Maintenance Log added successfully for Barcode: 'NDT-571-0'. View Log details here.