

Equipment Module – Quick Start Guide – Parts & Supplies Bulk Upload

This guide details how to add new Parts & Supplies (P&S) inventory to a warehouse via the Bulk Upload functionality. The Bulk Upload functionality provides a mechanism for adding multiple new Parts & Supplies at one time (via an Excel spreadsheet) to any warehouse for which you are the Warehouse Manager. The bulk upload is intended for P&S that will be assigned a new barcode number. If you are updating inventory for P&S and keeping the same barcode, please use the P&S Inventory search and then update the Stock Quantity in your warehouse.

1) Accessing the Bulk Upload Functionality

Select the “Bulk Upload Parts & Supplies” link from the “Parts & Supplies” 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.

Parts & Supplies Bulk Upload

Upload File: [Browse...](#) [Import File](#) (.xls files only) **1**

NOTE: The bulk upload is intended for P&S that will be assigned a new barcode number. If you are updating inventory for a P&S and keeping the same barcode, please use the P&S Inventory search and then update the Stock Quantity in your warehouse.

Bulk P&S 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 columns:** Barcode, Model Name/Number, Expendable?, Stock QTY, Inventory Date and Warehouse. These columns cannot be empty.
- FORMATTING:** The System is expecting the following columns with these exact names (case-sensitive) as identified here below. Please exclude any blank spaces around columns.
Barcode, Model Name/Number, Expendable?, Expiration Date, Serial Number, Stock QTY, Inventory Date, Warehouse, Warehouse Location, Comment
- FORMATTING:** 'Inventory Date' and 'Expiration Date' columns must be in 'MM/DD/YYYY' format. e.g. 04/30/2010
- If you do not provide a warehouse location and your warehouse contains an "Unspecified Sub-location", the location will default to that location. Otherwise it will be left blank and you will need to manually update the P&S record later.
- 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.*

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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 unique within all Parts & Supplies barcodes
- **MODEL NAME/NUMBER** – must be an existing P&S model name/number within the system
- **EXPENDABLE?** – indicates the P&S is expendable; must be “Y” or “N”
- **Expiration Date** - The date the P&S expires/should not be used; must be in "mm/dd/yyyy" format (Optional).
- **Serial Number** - Serial Number assigned by the Manufacturer. (Optional).
- **STOCK QTY** - The quantity to be added to the Warehouse of this particular P&S item; must be a whole number (i.e. no decimals).
- **INVENTORY DATE** - The date of last inventory; must be in "mm/dd/yyyy" format
- **WAREHOUSE** - The name of the warehouse to which you are adding new P&S; warehouse must already exist in the system. The uploader must be a Warehouse Manager for the warehouse.
- **Warehouse Location** - The location within the warehouse to which the new P&S are added; must already exist in the system. If left blank, the warehouse location will be defaulted to "Unspecified Sublocation", if it exists; otherwise it will be left blank.
- **Comments** – Optional

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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	Model Name/Number	Expendable?	Expiration Date	Serial Number	Stock QTY	Inventory Date	Warehouse	Warehouse Location	Comment
NDT-1028-001	02 Black Printer Cartridge	Y		12345	10	25-Oct-2010	NDT		
NDT-1028-002	CI2 Chemcassette	N	31-Dec-2010	56789	5	25-Oct-2010	NDT		

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.
Expendable? for Barcode: 'NDT-1028-003' is a required field. It must be either 'Y' or 'N'.
Inventory Date for Barcode: 'NDT-1028-003' is missing. Date must be in MM/DD/YYYY format.
Model Name/Number: Jess for Barcode: NDT-1028-004 does not exist.

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
Record with Barcode:NDT-1028-001 inserted successfully. View details here.
Record with Barcode:NDT-1028-002 inserted successfully. View details here.