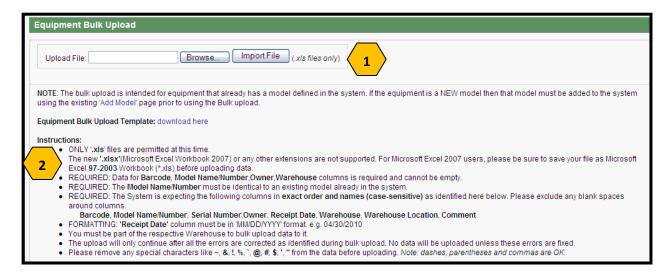
Equipment Module - Quick Start Guide - Equipment Bulk Upload

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.



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.

Equipment Module - Quick Start Guide - Equipment Bulk Upload

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.



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)