

Data Import Tool Training Guide

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Data Import Tools

The Data Import Tool is a stand alone tool designed to facilitate the process of importing data into maintenance quickly and easily. When importing data, users will enter their data via an Excel spreadsheet. Therefore, when inside of Maintenance, the data will be available to enter into Work Orders.

Capabilities

The Data Import Tool provides users with a quicker and easier way to enter their data into Maintenance. The tool accommodates the following categories of data:

- Properties
- Buildings
- Equipment Assets
- Staff
- Parts Catalog

Each of these categories is associated with a particular Excel Template. Users will [export](#) the template for each category. Then, they will fill the template with their data and save the Excel Spreadsheet. Users should save the data in such a way that they will know where to find it, and

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know which category of data to which it relates. This will help minimize errors in the importing process. **Note:** Users must have Excel installed on their machine to use the Data Import Tool.

Once users have completed filling out the templates, they will need to [import](#) the data into Maintenance.

How to Use the Data Import Tools

When users are looking to import a high volume of data into Maintenance, they will want to open the Data Import Tool. The Data Import Tool will have its own icon, separate from Maintenance. While it will open in its own page, the data import tool works closely with Maintenance, allowing users to provide data to use in Maintenance.

Data Link

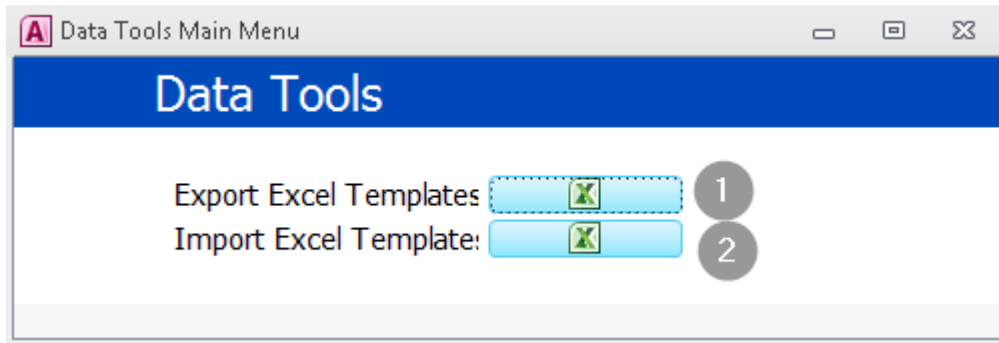
In order to import the data into the proper place, users will first need to link the Data Import Tools to the proper server and database.

When users open the Data Import Tool for the first time they will be asked to link their database. They will need to type the Server and the Database name into the proper fields and click **Link**. Users should be sure that they are connecting to same database as Maintenance.

Page Overview

After properly linking to the database, users can begin importing their data. The Main Menu will appear where the datalink pop up was; there users will have two options:

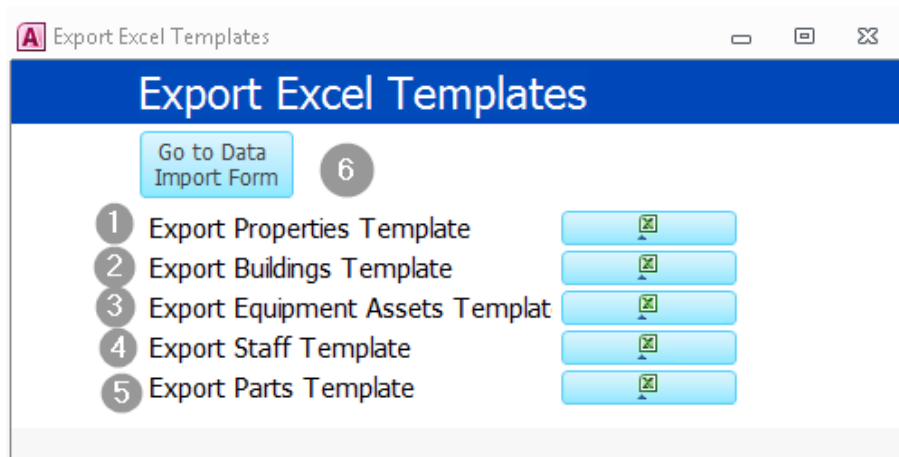
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1. The first option will provide the user with the template tables they need to import data.
2. After users have filled out and saved their templates, the second option will allow the user to import the data to Maintenance

Exporting Templates

When users select the Export Excel Templates button, they will find a list of the Templates. Clicking the excel icon will open the template in a separate Excel Window. Unfortunately, if a user does not have Microsoft Excel installed on their machine, the Data Import Tool will not work. Users must install Excel to use the feature. The export window is as shown below:



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<p>1. Properties: Clicking the excel icon will open an Excel Spreadsheet that will act as the template for data concerning property. The template includes the columns to the right. Bold represents a required field.</p>	<p>Property (name) Description Contact Address City State Country Zip Phone Fax Email URL</p>
<p>2. Buildings: Clicking the excel icon will open an Excel Spreadsheet that will act as the template for data concerning the Buildings. The template includes the columns to the right. Bold represents a required field.</p>	<p>Building Name Property Description Contact Address City State Zip Phone</p>
<p>3. Equipment Assets: Clicking the excel icon will open an Excel Spreadsheet that will act as the template for data concerning Equipment Assets. The template includes the columns to the right. Bold represents a required field.</p>	<p>Equipment Name Property Building Description Asset Group Manufacturer Supplier Model Number Serial Number</p>
<p>4. Staff: Clicking the excel icon will open an Excel Spreadsheet that will act as the template for data concerning Staff. The template includes the columns to the right. Bold represents a required field.</p>	<p>Staff Name Type Title Address City State Zip Home Phone Work Phone</p>

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	Mobile Phone Email
5. Parts: Clicking the excel icon will open an Excel Spreadsheet that will act as the template for data concerning parts. The template includes the columns to the right. Bold represents a required field.	Part Location Description Class Manufacturer Model

6. **Go to Data Import Form:** Users should click this button when they want to move on to importing their entered data. Once users have completed the Exporting Templates, the next step will be to Import (see [Importing](#)).

Below is an example of what the templates (Property) will look like:

	Property	Descriptio	Contact	Address	City	State	Country	Zip	Phone	Fax	Email	URL
1												
2												
3												
4												
5												
6												
7												
8												
9												
10												
11												

The required fields will have a **Red** column header, while the optional fields will have a **Green** column header.

When users have completed filling out the template, they will save it to their local machine. Users should provide a name that points to which data category the spreadsheet represents; this way they will be able to locate the file when importing.

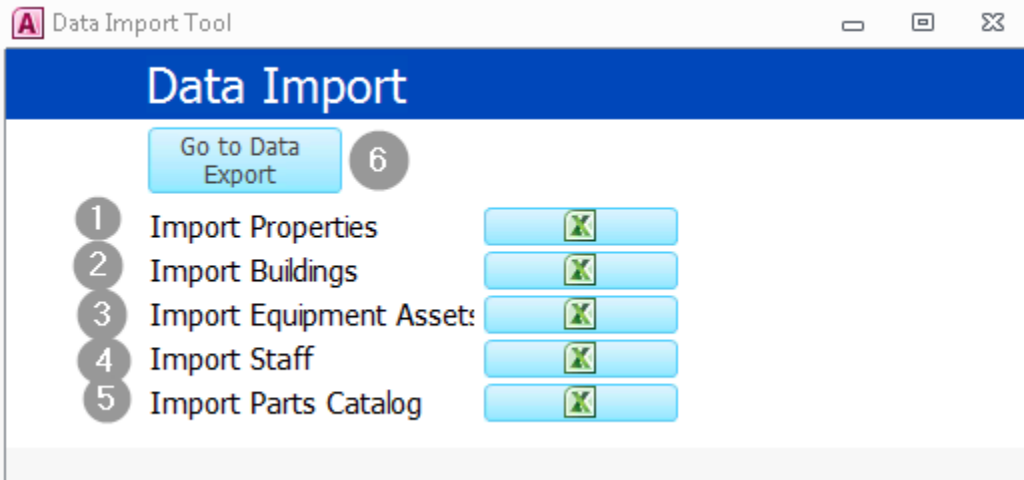
Importing

Once users have completed filling out and saving the Excel Templates, they can begin importing the data into Maintenance. It is important to note that users should **enter data in the**



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order provided, meaning starting with Properties and ending with Parts. This is necessary because Maintenance will not recognize the Property associated with an Asset, if the Asset information is imported before the Properties. See the Window below:



1. **Import Properties:** Clicking the Excel Icon will open a popup window of the user's files. The user can select an Excel Spreadsheet that is associated with Properties. Users must include at least the Properties category.
2. **Import Buildings:** Clicking the Excel Icon will open a popup window of the user's files. The user can select an Excel Spreadsheet that is associated with Buildings. Users must include the Building name and the Property associated with the Building.
3. **Import Equipment Assets:** Clicking the Excel Icon will open a popup window of the user's files. The user can select an Excel Spreadsheet that is associated with Equipment Assets. Users must include the Equipment Name, as well as the Property and the Building where the asset resides.
4. **Import Staff:** Clicking the Excel Icon will open a popup window of the user's files. The user can select an Excel Spreadsheet that is associated with Staff. Users must include the Name of the staff member and their staff type. There are three options for staff type: Staff, Supplier, or Supplier/Contractor.
5. **Import Parts Catalog:** Clicking the Excel Icon will open a popup window of the user's files. The user can select an Excel Spreadsheet that is associated with Parts. Users must include the Part as well as its location.
6. **Go to Data Export:** This will switch functions. It will change the popup window, and transform it into the export portion (see [Exporting Templates](#)).



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For any problems...

Contact MicroMain Support services.

How To Contact MicroMain

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