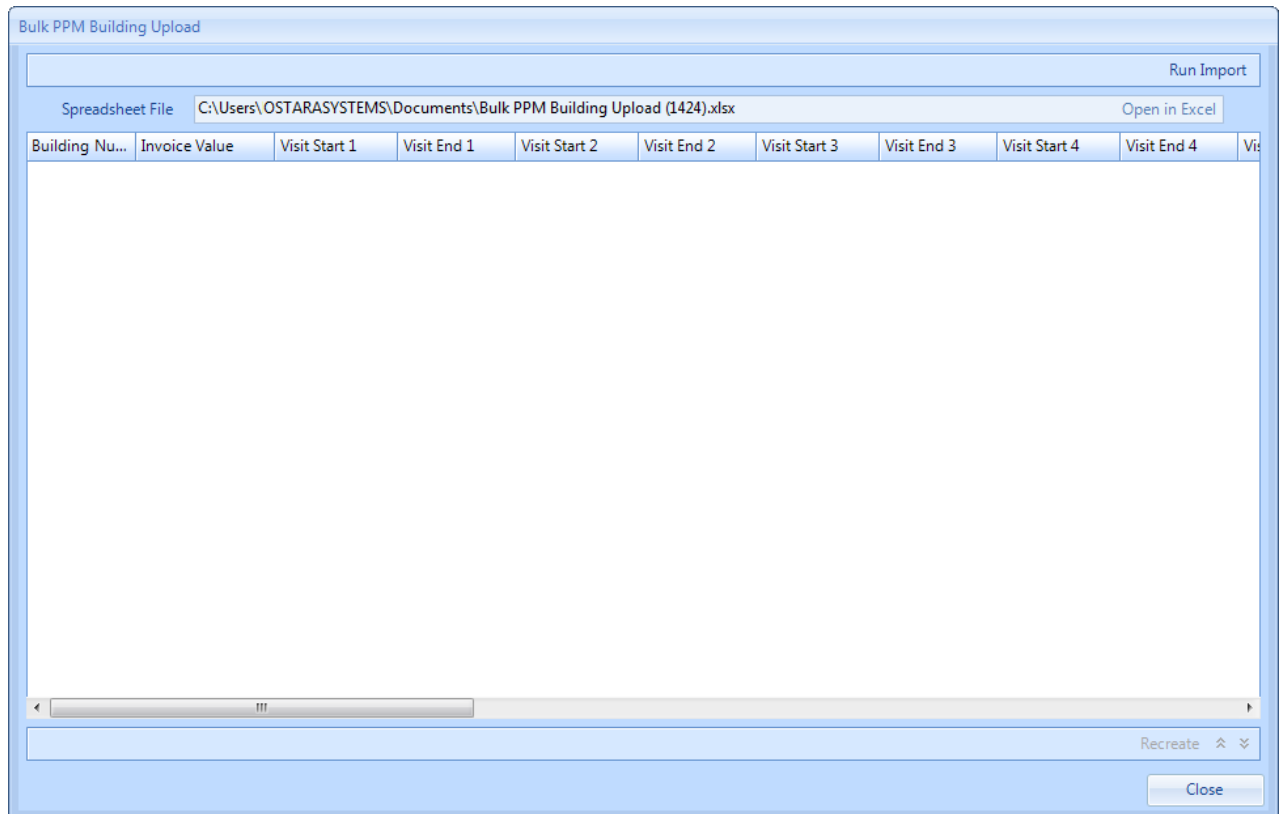


Bulk PPM Building Upload

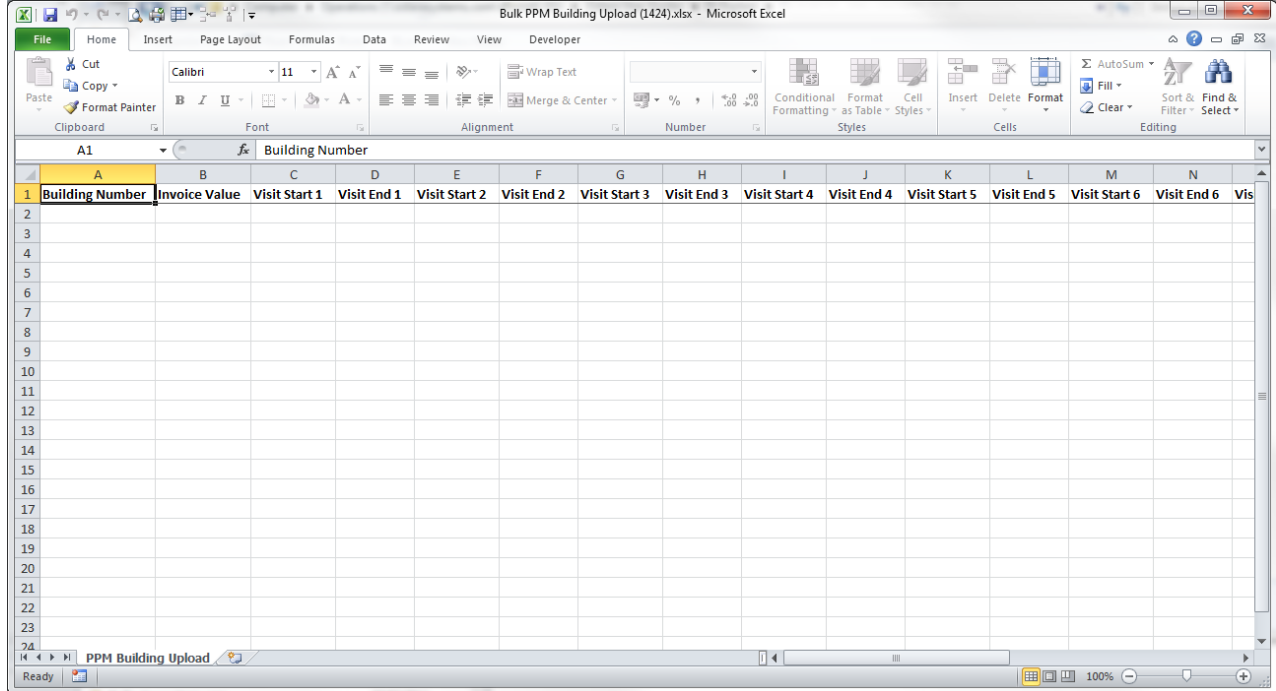
Wed, Jan 17, 2024 PPM Tab - Add Building(s) to a PPM Task

This action allows the user to bulk add a number of Buildings, update Invoice values and change Visit Start and End Dates on PPMs using a spreadsheet. This action can also be used on Contracts that have expired but ONLY the Invoice Values of Buildings can be modified in this way.

1. By clicking Edit Actions -> Bulk PPM Building Upload this window will open:



2. The following Excel spreadsheet will open simultaneously:



3. From here the User can update/add buildings, invoice values and visit dates. Once this information has been added to the spreadsheet click on the Save button in Excel.



The completed spreadsheet will look something like this:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	Vis
1	Building Number	Invoice Value	Visit Start 1	Visit End 1	Visit Start 2	Visit End 2	Visit Start 3	Visit End 3	Visit Start 4	Visit End 4	Visit Start 5	Visit End 5	Visit Start 6	Visit End 6	Vis
2	546	280.00	02/08/2013	14/08/2013	02/11/2013	22/11/2013	02/02/2014	14/02/2014	02/05/2014	22/05/2014					
3	553	7.4.1	03/08/2013	15/08/2013	03/11/2013	23/11/2013	03/02/2014	15/02/2014	03/05/2014	23/05/2014					
4	149	250.00	04/08/2013	16/08/2013	04/11/2013	24/11/2013	04/02/2014	16/02/2014	04/05/2014	24/05/2014					
5	545	259.32	05/08/2013	17/08/2013	05/11/2013	25/11/2013	05/02/2014	17/02/2014	05/05/2014	25/05/2014					
6	389	114.21	06/08/2013	18/08/2013	06/11/2013	26/11/2013	06/02/2014	18/02/2014	06/05/2014	26/05/2014					
7	035	247.00	07/08/2013	19/08/2013	07/11/2013	27/11/2013	07/02/2014	19/02/2014	07/05/2014	27/05/2014					
8	153	259.50	08/08/2013	20/08/2013	08/11/2013	28/11/2013	08/02/2014	20/02/2014	08/05/2014	28/05/2014					
9	949	531.00	09/08/2013	21/08/2013	09/11/2013	29/11/2013	22/02/2014	21/02/2014	09/05/2014	29/05/2014					
10	415	124.00	10/08/2013	22/08/2013	10/11/2013	30/11/2013	10/02/2014	29/02/2014	10/05/2014	30/05/2014					
11	59863	1150.00	10/08/2013	22/08/2013	10/11/2013	30/11/2013	10/02/2014	21/02/2014	10/05/2014	30/05/2014					

Note: This will match the Visit Start and Visit End dates to the correct period and update accordingly. This means that the Visit Start and Visit End dates must both be contained within the financial dates for a given period.

4. Upon clicking the save icon the screen within Ostara will be updated with the information entered in the spreadsheet.

Bulk PPM Building Upload

Run Import

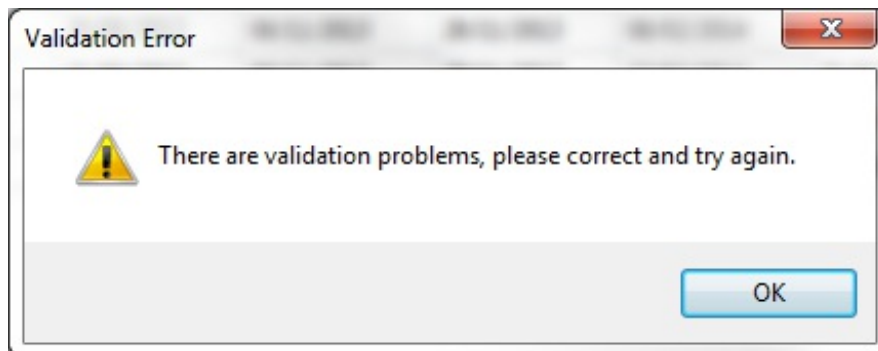
Spreadsheet File: C:\Users\OSTARASYSTEMS\Documents\Bulk PPM Building Upload (1424).xlsx Open in Excel

Building Nu...	Invoice Value	Visit Start 1	Visit End 1	Visit Start 2	Visit End 2	Visit Start 3	Visit End 3	Visit Start 4	Visit End 4	Vis
546	280	02/08/2013	14/08/2013	02/11/2013	22/11/2013	02/02/2014	14/02/2014	02/05/2014	22/05/2014	
553	7.4.1	03/08/2013	15/08/2013	03/11/2013	23/11/2013	03/02/2014	15/02/2014	03/05/2014	23/05/2014	
149	250	04/08/2013	16/08/2013	04/11/2013	24/11/2013	04/02/2014	16/02/2014	04/05/2014	24/05/2014	
545	259.32	05/08/2013	17/08/2013	05/11/2013	25/11/2013	05/02/2014	17/02/2014	05/05/2014	25/05/2014	
389	114.21	06/08/2013	18/08/2013	06/11/2013	26/11/2013	06/02/2014	18/02/2014	06/05/2014	26/05/2014	
035	247	07/08/2013	19/08/2013	07/11/2013	27/11/2013	07/02/2014	19/02/2014	07/05/2014	27/05/2014	
153	259.5	08/08/2013	20/08/2013	08/11/2013	28/11/2013	08/02/2014	20/02/2014	08/05/2014	28/05/2014	
949	531	09/08/2013	21/08/2013	09/11/2013	29/11/2013	22/02/2014	21/02/2014	09/05/2014	29/05/2014	
415	124	10/08/2013	22/08/2013	10/11/2013	30/11/2013	10/02/2014	29/02/2014	10/05/2014	30/05/2014	
59863	1150	10/08/2013	22/08/2013	10/11/2013	30/11/2013	10/02/2014	21/02/2014	10/05/2014	30/05/2014	

Recreate ⚙

Close

5. If all the information is correct then click on Run Import. If, however, the user notices a mistake has been made, then it can simply be rectified in the spreadsheet and saved again. This will then update the above screen accordingly. Clicking on Run import will validate the data is correct. If the invoice values are in the wrong format or the dates are invalid the user will get the following message:



6. Clicking OK will take the user back to the previous screen, highlighting in red where the validation errors are:

Bulk PPM Building Upload

Run Import

Spreadsheet File: C:\Users\OSTARASYSTEMS\Documents\Bulk PPM Building Upload (1424).xlsx Open in Excel

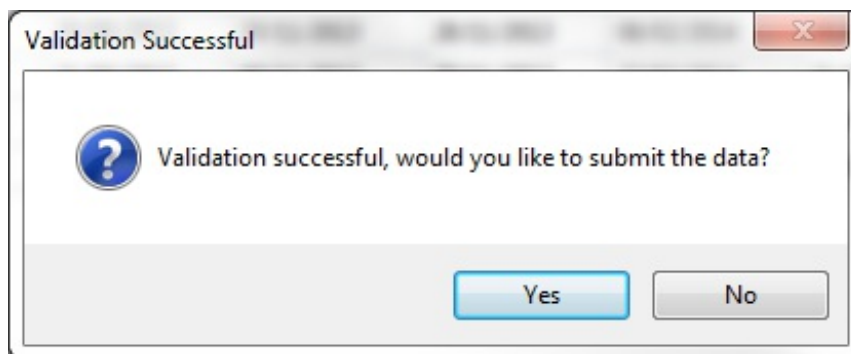
Building Nu...	Invoice Value	Visit Start 1	Visit End 1	Visit Start 2	Visit End 2	Visit Start 3	Visit End 3	Visit Start 4	Visit End 4	Vis
546	280	02/08/2013	14/08/2013	02/11/2013	22/11/2013	02/02/2014	14/02/2014	02/05/2014	22/05/2014	
553	7.4.1	03/08/2013	15/08/2013	03/11/2013	23/11/2013	03/02/2014	15/02/2014	03/05/2014	23/05/2014	
149	250	04/08/2013	16/08/2013	04/11/2013	24/11/2013	04/02/2014	16/02/2014	04/05/2014	24/05/2014	
545	259.32	05/08/2013	17/08/2013	05/11/2013	25/11/2013	05/02/2014	17/02/2014	05/05/2014	25/05/2014	
389	114.21	06/08/2013	18/08/2013	06/11/2013	26/11/2013	06/02/2014	18/02/2014	06/05/2014	26/05/2014	
035	247	07/08/2013	19/08/2013	07/11/2013	27/11/2013	07/02/2014	19/02/2014	07/05/2014	27/05/2014	
153	259.5	08/08/2013	20/08/2013	08/11/2013	28/11/2013	08/02/2014	20/02/2014	08/05/2014	28/05/2014	
949	531	09/08/2013	21/08/2013	09/11/2013	29/11/2013	22/02/2014	21/02/2014	09/05/2014	29/05/2014	
415	124	10/08/2013	22/08/2013	10/11/2013	30/11/2013	10/02/2014	29/02/2014	10/05/2014	30/05/2014	
59863	1150	10/08/2013	22/08/2013	10/11/2013	30/11/2013	10/02/2014	21/02/2014	10/05/2014	30/05/2014	

Recreate

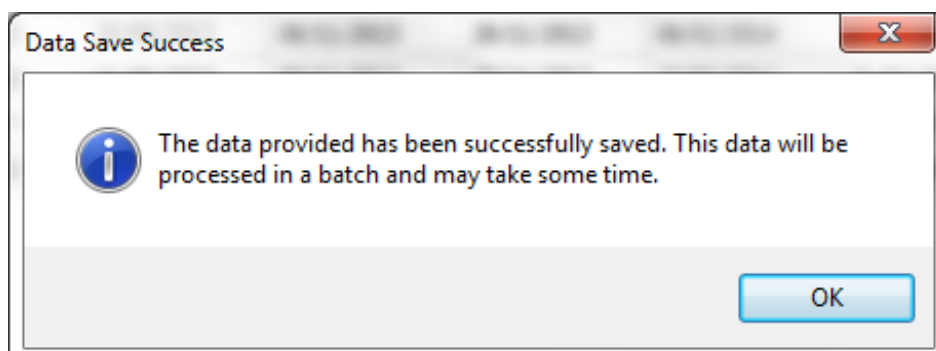
Close

7. To correct these errors the User can either go back to the original spread sheet (if they still have it open), make the necessary amendments and click Save or click on the Recreate button. Clicking the Recreate button will open up the spread sheet so that any amendments can be made. Clicking on the save icon will apply those changes to the screen above where the user can then click on Run Import again.

8. If the data is now valid the following message will be shown:



9. Clicking on No will return the User to the previous screen. Clicking on Yes will present the User with the following message:



10. Clicking on OK will import the data in the background and send the User an email once complete. If the import was successful the email will state that "All data processed with

successful", giving the filename with a date a time for reference. If however, the import was unsuccessful in any way then the email will detail the errors with an explanation as to what the issue was, anything not detailed in the email will be updated in the contract accordingly:

Filename: Bulk PPM Building Upload (1424).xlsx
Uploaded: 07/07/2014 11:07

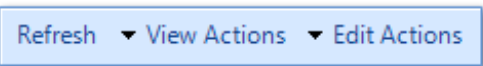
All data processed, some errors exist

3	149	The dates that were provided for Visit 2 correspond to a closed period.,The dates that were provided for Visit 4 correspond to a closed period.
4	545	The dates that were provided for Visit 2 correspond to a closed period.,The dates that were provided for Visit 3 correspond to a closed period.
8	949	Visit Start was greater than Visit End for Visit 3.
9	415	The dates that were provided for Visit 2 correspond to a closed period.,The dates that were provided for Visit 3 correspond to a closed period.
10	59863	No matching building found for the client.

11. The user can then rectify any mistakes by clicking Edit Actions -> Bulk PPM Building Upload and starting the process over again.

Note: Since these actions are completed in the background, it will be necessary to refresh the Contract screen to see the changes once the email has been received.

12. Once the data has been amended, clicking the "Refresh" button in the PPM Tasks header will then update the Buildings section with the new changes.



Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=211>