

## Contents

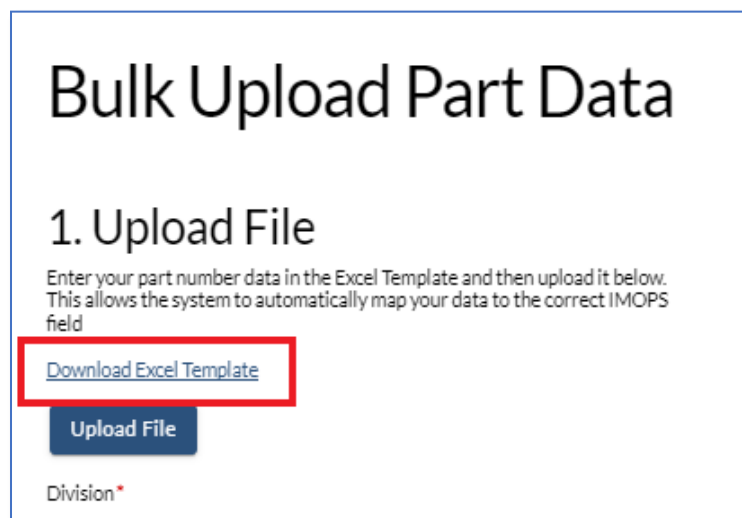
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## Introduction

This user guide provides step-by-step instructions on using the Bulk Upload feature in Concourse to update or replace catalog information.

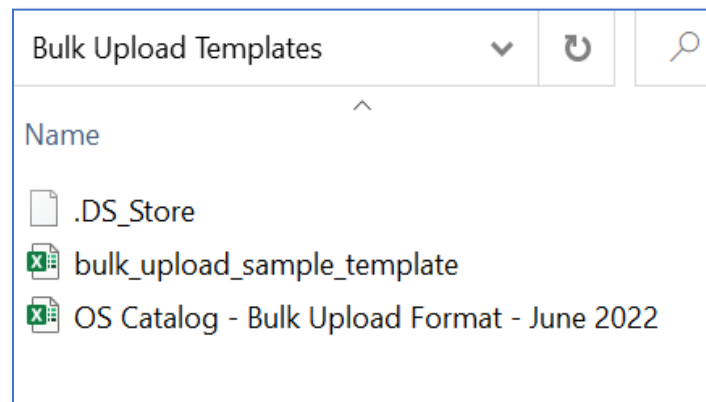
## Before You Begin

**Download the template:** Download the template file from the Concourse > Bulk Upload > Page 1



**The downloaded Bulk Upload template contains two files.**

- “Bulk upload sample template”:
  - Input data into this file to use for bulk upload
- “OS Catalog-Bulk Upload Format - June 2022”:
  - This file details the required fields and data types in the bulk upload template



## Pricing in Catalog Management

**Gather file:** Prepare the data file containing the PN's and associated cost information in the required format. Review below table for all the details.

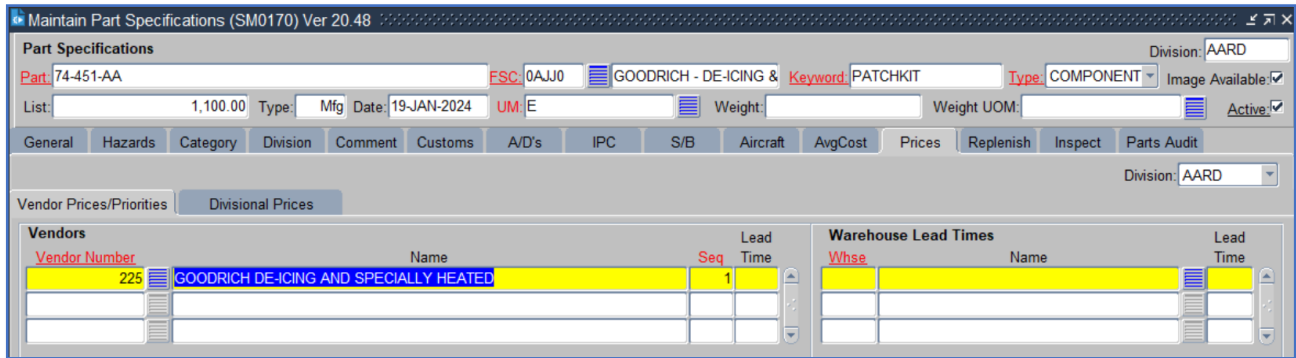
**Understand data:** Be familiar with the mandatory and optional fields included in the data file.

Field Name	Type	Data Requirement	Example
DIVISION	Required	1, 7, or 11	7
PART NUMBER	Required	lin IMOPS "Part SPEC"	2873-300
FSC NUMBER	Required		15284
VENDOR NUMBER	Required	From IMOPS; numeric	12345
LEAD TIME (DAYS)	Optional	Numeric field	180
MOQ	Optional	Numeric field	25
LIST PRICE	Optional	Numeric field	549.99
LIST PRICE EFFECTIVE START DATE	Optional	Start date only	1-Oct-2023
UNIT COST	Required	Numeric field	499.97
UNIT COST EFFECTIVE START DATE	Required	Date field	1-Oct-2023
UNIT COST EFFECTIVE END DATE	Required	Date field	31-Dec-2023
QUANTITY PRICE BREAK UNIT COST 1	Optional	Numeric field	357.99
QUANTITY PRICE BREAK 1 QUANTITY	Optional	Integer only	50
QUANTITY PRICE BREAK UNIT COST 2	Optional	Numeric field	325.45
QUANTITY PRICE BREAK 2 QUANTITY	Optional	Integer only	100
QUANTITY PRICE BREAK UNIT COST 3	Optional	Numeric field	299.99
QUANTITY PRICE BREAK 3 QUANTITY	Optional	Integer only	200
QUANTITY PRICE BREAK UNIT COST 4	Optional	Numeric field	274.75
QUANTITY PRICE BREAK 4 QUANTITY	Optional	Integer only	300
QUANTITY PRICE BREAK UNIT COST 5	Optional	Numeric field	254.74
QUANTITY PRICE BREAK 5 QUANTITY	Optional	Integer only	500

## Preparing the Data File

- **File Format:** The Bulk Upload feature supports XLSX
- **Mandatory Fields:** Ensure the file includes all mandatory fields required for creating or updating PNs (PNs, FSC, OEM Name and Vendor Number).
- **Vendor Number:** Vendor Number should be for PN / FSC combination from the IMOPS Maintain Part Specification screen

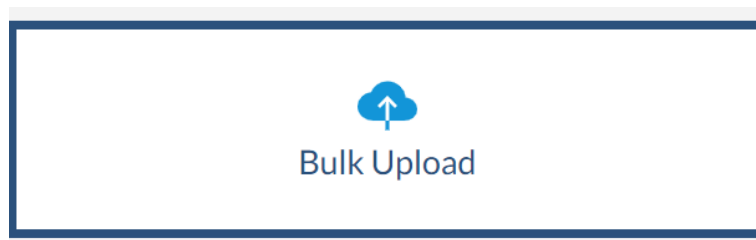
## Pricing in Catalog Management



- **Optional Fields:** Include any additional fields relevant to the PNs (e.g., Cost, MOQ, Lead Time, List Price, Quantity Price Breaks)

## Using the Bulk Upload Feature

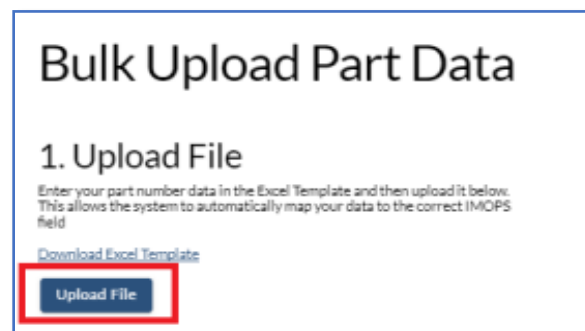
**Access the Bulk Upload Tool:** Locate and Click on the “Bulk Upload” tool tile within Concourse dashboard.



### Page 1

**Upload the Data File on Page 1:** Select the prepared data file and upload it using “Upload File” button.

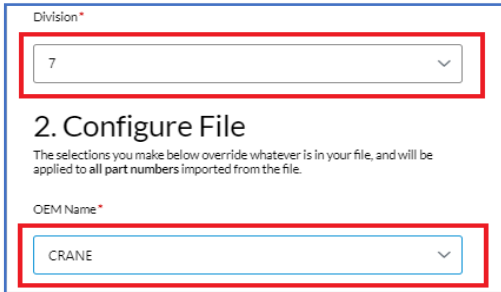
**Important Reminder:** Information uploaded via the excel file will override information entered on Page 1


 A form titled "Bulk Upload Part Data". Below the title, it says "1. Upload File". A sub-instruction reads: "Enter your part number data in the Excel Template and then upload it below. This allows the system to automatically map your data to the correct IMOPS field." Below this, there is a link "Download Excel Template" and a button labeled "Upload File". The "Upload File" button is highlighted with a red rectangular border.

## Pricing in Catalog Management

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**Enter Mandatory Fields:** Enter “Division” and “OEM Name”



Division\*

7

**2. Configure File**

The selections you make below override whatever is in your file, and will be applied to all part numbers imported from the file.

OEM Name\*

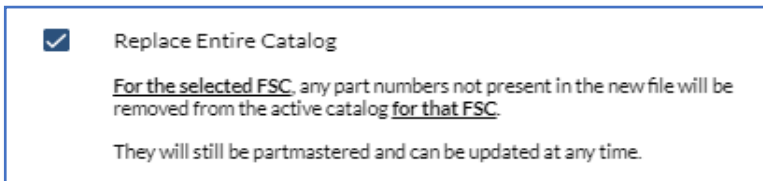
CRANE

### Replace Entire Catalog

Select the checkbox “Replace Entire Catalog” on Page 1 to replace the entire catalog. Keep unchecked to *update* the existing catalog.

#### ▪ Scenario 1: End of year pricing

- Check “Replace Entire Catalog” to replace the entire IMOPS catalog
- If any PN for the FSC is not present in the file uploaded, then those PN's will be removed from the catalog showing in Concourse.



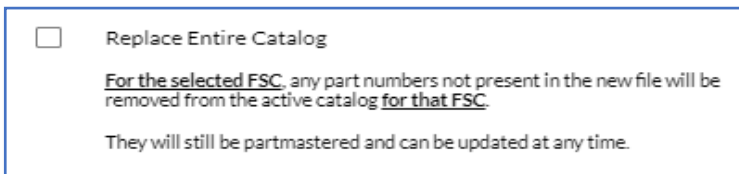
☒ Replace Entire Catalog

For the selected FSC, any part numbers not present in the new file will be removed from the active catalog for that FSC.

They will still be partmastered and can be updated at any time.

#### ▪ Scenario 2: Updating Catalog Attributes

- Do NOT check “Replace Entire Catalog” to only update PN catalog attributes in the existing catalog.
- Update PN catalog attributes such as Unit Cost, Lead Time, or MOQ, among others.



☐ Replace Entire Catalog

For the selected FSC, any part numbers not present in the new file will be removed from the active catalog for that FSC.

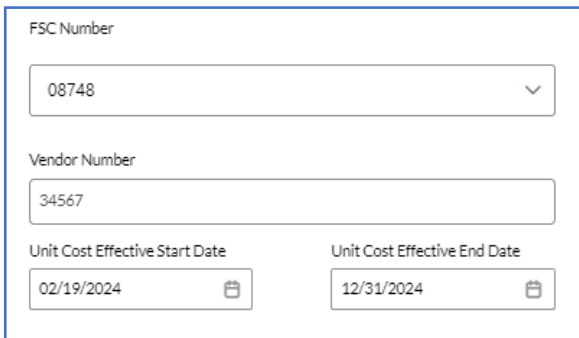
They will still be partmastered and can be updated at any time.

## Pricing in Catalog Management

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**Enter Optional Fields:** Enter “FSC Name,” “Vendor Name,” “Unit Cost Effective Start Date” and “Unit Cost Effective End Date”

- Note:
  - Optional fields do not need to be entered on Page 1 if the information is contained in the file
  - Vendor Number entered will be validated against Parts Specification in IMOPS



The screenshot shows a form with four fields. The first field, 'FSC Number', is a dropdown menu with '08748' selected. The second field, 'Vendor Number', is a text input with '34567'. The third field, 'Unit Cost Effective Start Date', is a date picker with '02/19/2024' selected. The fourth field, 'Unit Cost Effective End Date', is a date picker with '12/31/2024' selected.

Click on **“Next”**.

## Page 2

Page 2 shows configured file values selected on Page 1 on the left side of the page.

- Map imported data to IMOPS: All columns with data from the file are shown below with a checked box corresponding to IMOPS fields.
- Columns not required to import can be unchecked.
- Check and confirm the sample values are correct per the corresponding IMOPS field.
  - Sample values shown are from the first three rows of data in the file.
- Certain columns are always grouped with other columns, meaning they cannot be loaded if the related columns are unchecked.
  - In the 1<sup>st</sup> example below, for Unit Cost to be loaded, Unit Cost Effective Start, end and Vendor Number must be in the file
  - In the 2<sup>nd</sup> example below, for List Price to be loaded, List Price Effective Start Date must also be in the file

## Pricing in Catalog Management

Costing Information		
Import Column?	IMOPS Field	Sample Values
<input checked="" type="checkbox"/>	Unit Cost	\$201.00 \$201.00 \$201.00
<input checked="" type="checkbox"/>	Unit Cost Effective Start Date	15-Dec-2023 15-Dec-2023 15-Dec-2023
<input checked="" type="checkbox"/>	Unit Cost Effective End Date	31-Dec-2024 31-Dec-2024 31-Dec-2024
<input checked="" type="checkbox"/>	Vendor Number	30165 30165 30165

<input checked="" type="checkbox"/>	List Price	\$40.00 \$40.00 \$40.00
<input checked="" type="checkbox"/>	List Price Effective Start Date	15-Dec-2023 15-Dec-2023 15-Dec-2023

**Upload and Process:** Click on “Upload and Process” button.

### Page 3

- If “Replace Entire Catalog” is checked on Page 1, then the below pop-up message is displayed.
  - Click “Yes.”

Confirm Data Upload & Part Expiration

You are about to upload new data to IMOPS and overwrite any existing part data. Are you sure you want to proceed?

Additionally, any part numbers not in your uploaded file will be expired from the active catalog upon the earliest Effective Start Date in your file.

No

Yes

- If “Replace Entire Catalog” is not checked on Page 1, then the below pop-up message is displayed.
  - Click “Yes.”

Confirm Data Upload

You are about to upload new data to IMOPS and overwrite any existing part data. Are you sure you want to proceed?

No

Yes

### Success and Error Handling

Page 3 will display the Part Number Log (All Parts) and Part Number Error Log.

## Upload Complete

Your upload was completed successfully!

This will be reflected in DOMO after the next Data Set update.

File: Bulk\_Upload\_Crane\_1.xlsx

Division	OEM	Replace Catalog?	FSC	Vendor Number	Unit Cost Effective Start Date	Unit Cost Effective End Date
7	CRANE	Yes	81982	34567	2/19/2024	12/31/2024

Part Numbers Log (All Parts)

461 Part Numbers

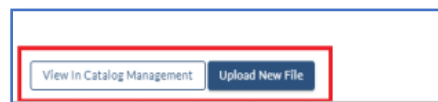
[Download File](#)

Part Numbers Error Log

288 Part Numbers

[Download File](#)

Page 3 will also display “View in Catalog Management” and “Upload New File” button at the bottom of the page.



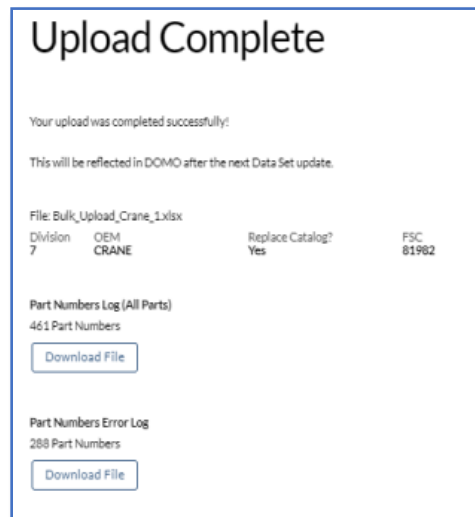
- “View in Catalog Management”: goes to the Catalog Management screen in Concourse to view the results of the Bulk upload
- “Upload New File”: goes to Page 1 for the next upload



## Pricing in Catalog Management

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**Error Handling:** To view the status of each row uploaded into IMOPS via this bulk upload feature, Page 3 provides links to two files to download.



- **Part Numbers Log (All Parts):**
  - This file shows both Success and Error status for each row in the Bulk Upload file.
  - Below is a snapshot of the Part Numbers Log (All Parts)

A	B	C	D	E	F	G
BATCH_NO	UPLOAD_STATUS	ERROR_TYPE	DIVISION	FSC	VENDOR_NO	PART
29326158614	Success		7	51663	49420	AS3069-12
29326158614	Success		7	51663	49420	AS3650-6-27
29326158614	Success		7	51663	49420	LR22450
29326158614	Success		7	51663	49420	LR26393-016
29326158614	Success		7	51663	49420	LR26393-017
29326158614	Success		7	51663	49420	LR26393-023

- **Part Numbers Error Log:**
  - File shows the Error status, Error Type for the rows that errored out during the Bulk Upload.
  - Here is a snapshot of the Part Numbers Error Log.

A	B	C	D	E	F	G
BATCH_NO	UPLOAD_STATUS	ERROR_TYPE	DIVISION	FSC	VENDOR_NO	PART
29562315893	Error	ROW #: 69 Part/FSC does not exist	7	81982	44314	8-736-06
29562315893	Error	ROW #: 70 Part/FSC does not exist	7	81982	44314	8-736308-02
29562315893	Error	ROW #: 71 Part/FSC does not exist	7	81982	44314	8-753-03
29562315893	Error	ROW #: 72 Part/FSC does not exist	7	81982	44314	8-754-03

## Error Message displayed in Error Log

Below are all the types of errors that could show in the Bulk Upload error log.

Refer to the earlier section on how to prepare the file and gather data before the next upload attempt.

- Unit Cost Eff Dt not correct Format
- Unit Cost End Dt not correct Format
- List Price Eff Dt not correct Format.
- List Price End Dt not correct Format.
- Division does not exist.
- Part does not exist.
- Part/FSC does not exist.
- Unit Cost needs effective and end dates.
- Vendor must be used to insert Unit Cost
- Vendor does not exist.
- Could not expire most recent Vendor Cost
- Cannot Update Org\_prices table record.
- Trying to insert Duplicate Cost-effective entry.
- Could not insert new Vendor Cost
- Could not update vendor price break.
- Could not insert new Vendor Price Break 1
- Could not insert new Vendor Price Break 2
- Could not insert new Vendor Price Break 3
- Could not insert new Vendor Price Break 4
- Could not insert new Vendor Price Break 5
- List Price Effective Date is null. Cannot insert list Price.
- Cannot update List Price record with same effective date.
- Could not insert new List Price
- Could Not update Lead Time
- Could Not update Minimum Quantity
- FSC is greater than five characters.
- OEM is greater than thirty characters.
- Division is greater than two numbers.
- Division is not a number.
- Vendor Number is greater than five numbers.
- Vendor Number is not a number.
- Part is greater than fifty characters.
- Unit Cost is not a number.
- List Price is not a number.
- Quantity Price Break 1 is not a number.
- Price Break 1 Price is not a number.
- Quantity Price Break 2 is not a number.
- Price Break 2 Price is not a number.
- Quantity Price Break 3 is not a number.
- Price Break 3 Price is not a number.
- Quantity Price Break 4 is not a number.
- Price Break 4 Price is not a number.
- Quantity Price Break 5 is not a number.
- Price Break 5 Price is not a number.
- Lead Time is greater than three numbers.
- Lead Time is not a number.
- Minimum Quantity is greater than five numbers.
- Minimum Quantity is not a number.

## How to read the Error Log

BATCH_NO	UPLOAD_STATUS	ERROR_TYPE	DIVISION	FSC	VENDOR_NO	PART
29562315893	Error	ROW #: 69 Part/FSC does not exist	7	81982	44314	8-736-06

- Column A: Batch No of upload
- Column B: Upload Status - "Error"
- Column C: Error Type
  - Displays Row # of Error
  - Error Message
- Column D: Div #
- Column E: FSC
- Column F: Vendor #
- Column G: Part #

## Important Reminders

1. Information uploaded via the excel file will override information entered on Page 1
2. Do not make any changes to the upload file:
  - a. Do not delete columns
  - b. Do not change the column header names
  - c. Do not change the column order
3. Under work: replacing a Catalog with a future date
  - a. At this time, please only replace information with an effective date of "today"