Contents

![Concourse logo]

Introduction

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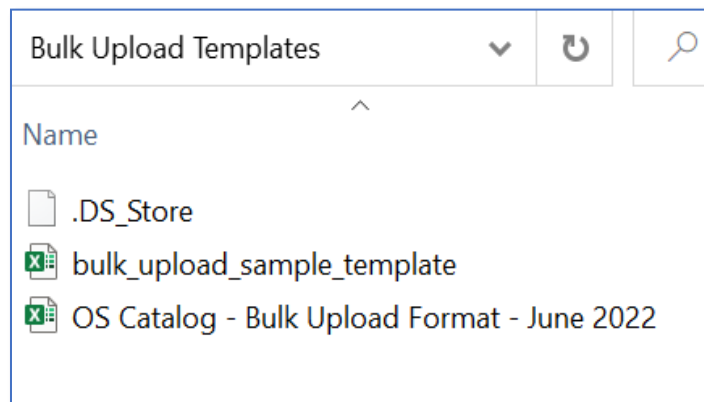
Before You Begin

Download the template: Download the template file from the Concourse > Bulk Upload > Page 1
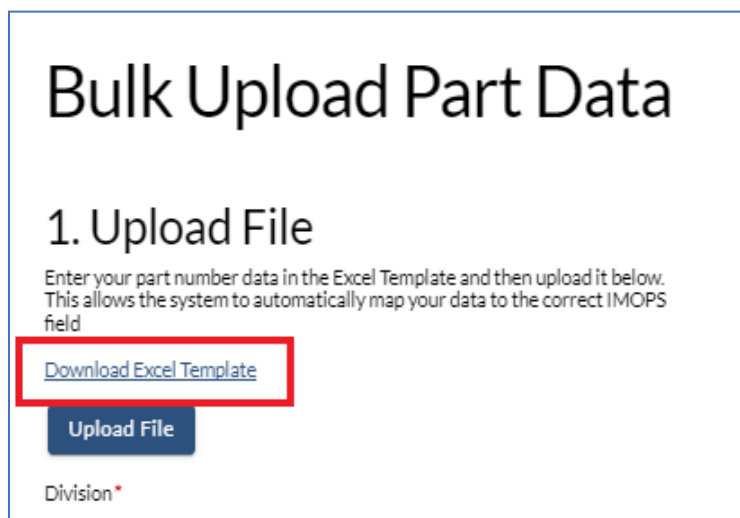
The downloaded Bulk Upload template contains two files.

- ▪ "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

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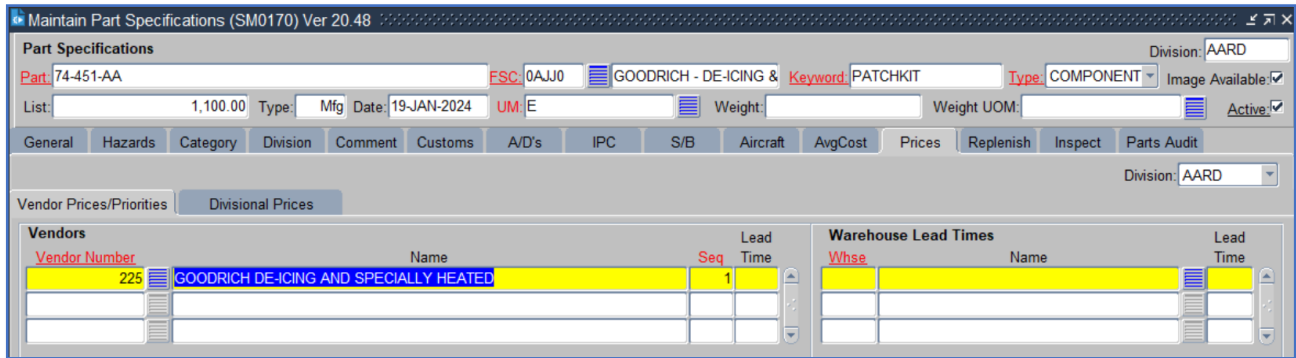
Understand data: Be familiar with the mandatory and optional fields included in the data file.

Field Name	Type	Data Requirement	Example
DIVISION	Required	1, 7, or 11	7
PART NUMBER	Required	Iin 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.
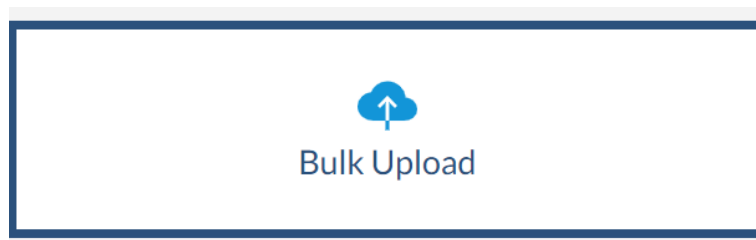
- ▪ **Optional Fields:** Include any additional fields relevant to the PNs (e.g., Cost, MOQ, Lead Time, List Price, Quantity Price Breaks)
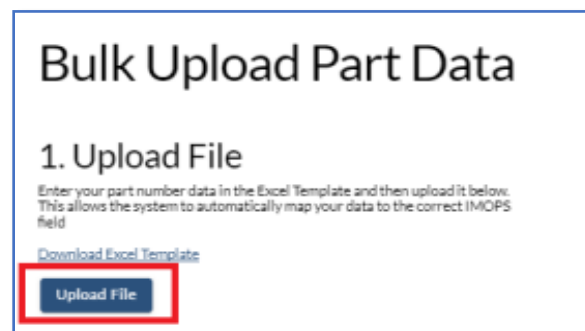
Using the Bulk Upload Feature

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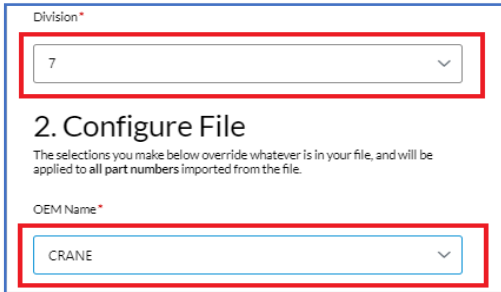

Page 1

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

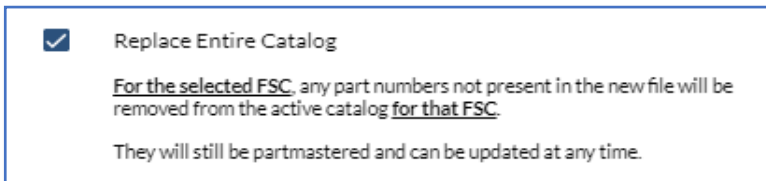**Enter Mandatory Fields:** Enter "Division" and "OEM Name"

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.
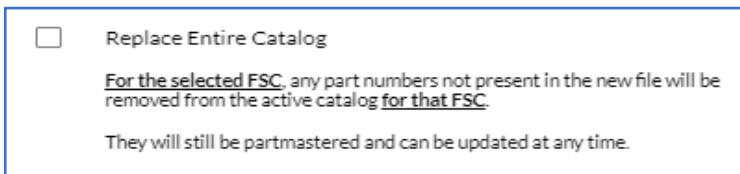

- **Scenario 2: Updating Catalog Attributes**
  - Do NOT check "Replace Entire Catalog" to only update PN catalog attributes in the existing catalog.
  - Update PN catalog attributes such as Unit Cost, Lead Time, or MOQ, among others.

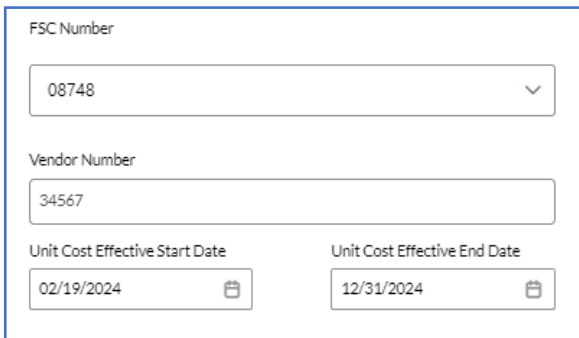**Enter Optional Fields:** Enter "FSC Name," "Vendor Name," "Unit Cost Effective Start Date" and "Unit Cost Effective End Date"

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

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.
  - o 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.
  - o In the first example below, for Unit Cost to be loaded, Unit Cost Effective Start, end and Vendor Number must be in the file.
  - o In the second example below, for List Price to be loaded, List Price Effective Start Date must also be in the file.

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.
    - o 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.
    - o 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.


Page 3 will also display "View in Catalog Management" and "Upload New File" button at the bottom of the page.
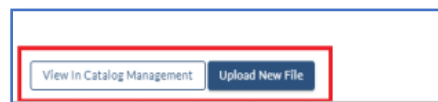
- ▪ "View in Catalog Management": goes to the Catalog Management screen in Concourse to view the results of the Bulk upload.
- ▪ "Upload New File": goes to Page 1 for the next upload.

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.

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
7	CRANE	Yes	81982

Part Numbers Log (All Parts)
461 Part Numbers

[Download File]

Part Numbers Error Log
288 Part Numbers

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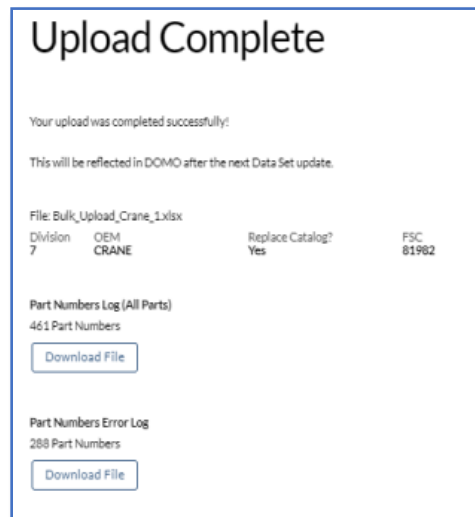
- ▪ **Part Numbers Log (All Parts):**
  - o This file shows both Success and Error status for each row in the Bulk Upload file.
  - o Below is a snapshot of the Part Numbers Log (All Parts)

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:**
  - o File shows the Error status, Error Type for the rows that errored out during the Bulk Upload.
  - o 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

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

Frequently Answered Questions.

1. Can I perform Bulk Upload with a future unit cost?

Answer: Yes, you can load unit cost for part number with a future effective start and end date. The future dates will appear in Concourse > Parts Catalog > View by PN > Vendor Price Break >Future cost section.

2. Can I backdate the unit cost when performing Bulk Upload?

Answer: Yes, you can backdate the effective start date for unit cost. The backdated start date cannot be before the current start date of the unit cost. Example: If the current start date is 01/01/2024, you can update date it to 03/01/2024 (any date after 01/01/2024 & before today)

3. Can I replace the entire catalog with a future date?

Answer: No, currently you can only replace the entire catalog with an effective as today. However, we are actively working on a feature that allows you to replace the entire catalog with a future start date.

4.   Do BLANKS in the file overrise existing values in Concourse?

Answer: Yes, BLANKS in the file will overwrite the following fields while performing Bulk Upload with both 'Replace Entire Catalog' checked and unchecked.

- Lead Time
- MOQ
- Unit Cost
- Cost Effective Start Date
- Cost Effective End Date.

5.   Does data on the file override data inputted on Page 1?

Answer: Yes, Data on the file will override FSC, vendor number and cost-effective start and end dates inputted on Page 1.