

Summary

Use the Benchmate **Import** program to quickly build, update and revise your CMMS database from information contained in a spreadsheet or other database. **Import** can run even though Benchmate CMMS is running.

This program replaces and extends the Import commands formerly in the Benchmate Utility program and you don't need to 'get everyone off Benchmate' to import data.

Import is password protected. You must enter your password to use Import which in turn delimits the files to which you can import. When you select a file to import, Benchmate will check that you have permission to VIEW, ADD, CHANGE & DELETE the associated file(s).

NOTE: **Import** is an evolving program that can expand to handle your future requirements. We encourage you to send us your requirements.

Getting Started

Input Data Format

Data imported into Benchmate must be formatted as a tabbed text file. (Excel® spreadsheets can be saved in this format.) Each imported record represents one screen or record. It may also represent one line in a detailed window (such as an equipment spare part or a component). Each record consists of several fields separated the ASCII **TAB** character. Each line is terminated by the ASCII **CR LF** (carriage return & line feed) characters.

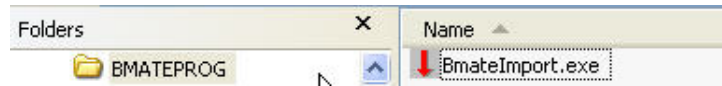
All data consists of one or more ASCII text (letters, numbers & spaces) characters. Text fields are loaded into Benchmate exactly as contained in the text file. Text in 'keyed' or unique fields should be upper case. If not, **Import** will force them to upper case for you. The **Time**, **Date** & **Cost** fields must be formatted as shown in the following table.

Data Type	Format
Time	Accepts three formats: <ul style="list-style-type: none">• hh:mm – hours & minutes• hh.ff – hours & fraction• mm - minutes
Date	mm/dd/yyyy – month/day/year
Cost	\$ddd.cc – dollars & cents with or without \$ sign

Importing Data Into Benchmate CMMS

Running the Program

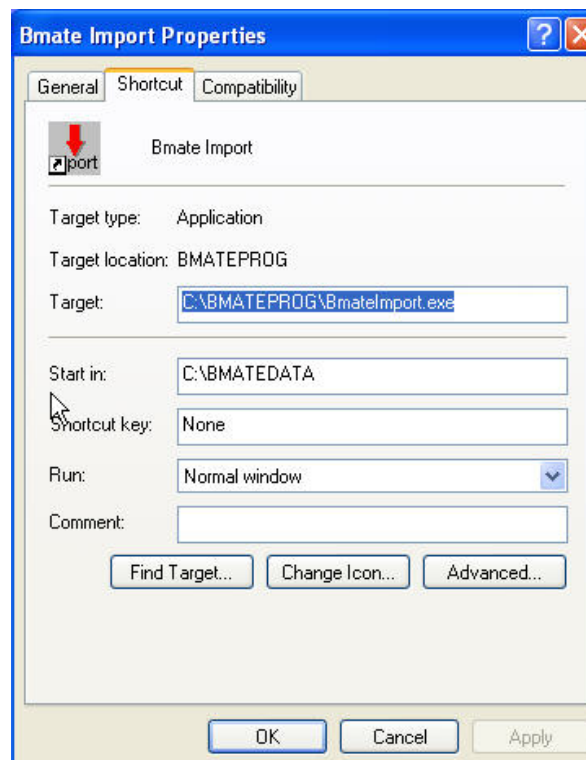
Import is loaded in your \BMATEPROG directory as BmateImport.exe.



Using Windows Explorer create a shortcut and copy to your desktop. Right click the icon to open its menu and rename the desktop icon to **Bmate Import**.



Then right click the icon again and select Properties. Change the **'Start in'** directory to C:\BMATEDATA so 'Import' will find the database files when it starts.



Start **Import** by 'double clicking' the desktop icon and enter your Benchmate password.

Password Permissions

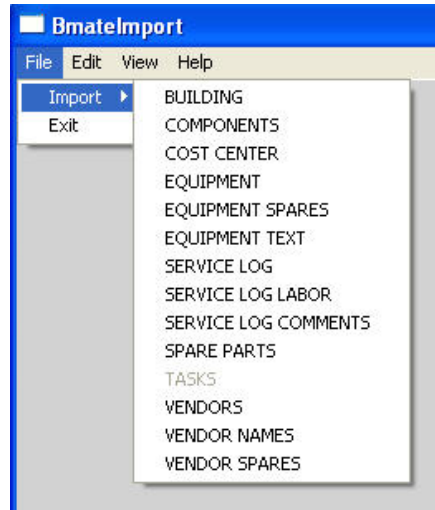
Your password controls the CMMS screens you can view and modify. It also controls the files you can import as shown below. You must have VIEW, ADD, CHANGE & DELETE permission for the Screen(s) associated with the file you want to import.

Import File	Screen
Building	Validation
Components	Equipment
Cost Center	Validation
Equipment	Equipment
Equipment Spares	Equipment and Spare Parts
Equipment Text	Equipment
Service Log	Service Log
Service Log Labor	Service Log
Service Log Comments	Service Log
Spare Parts	Spare Parts
Maintenance History	Service Log
Vendors	Equipment
Vendor Names	Equipment
Vendor Spares	Equipment

Importing Data

Selecting the Import File

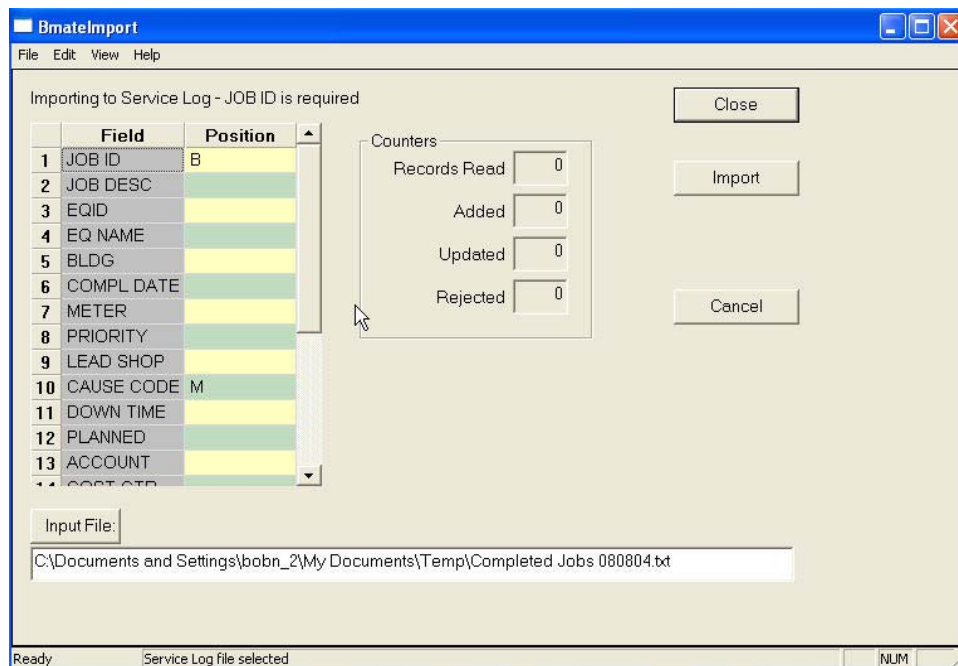
Once you have entered your password, select **Files** → **Import** and click the file you wish to import to.



Import Window

Data Map

A window showing the input map, counters & buttons is displayed after you select a file to import to. The left portion of the window shows a 'map' that identifies the data fields



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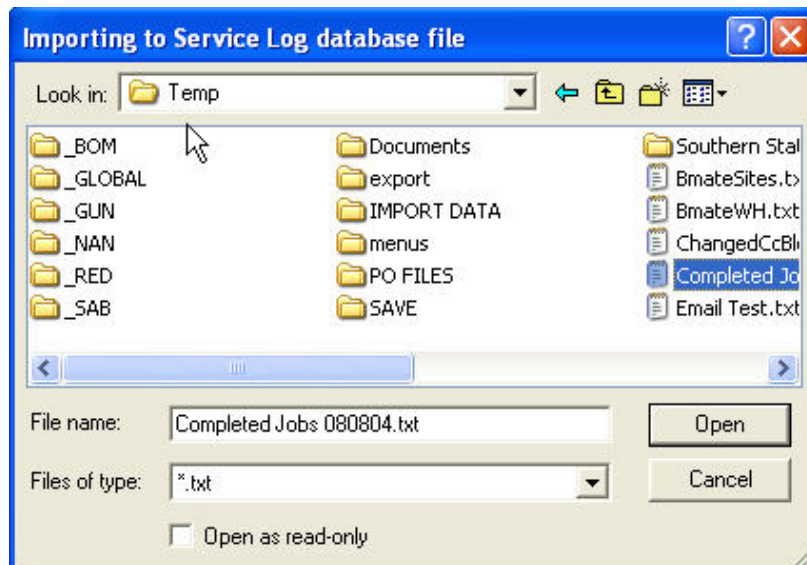
that can be imported (**Field**) and the column (**Position**) in the spreadsheet containing that information.

In this example, only the **JOB ID** (column B) and the **Cause Code**(column M) will be imported to the Service Log.

Empty entries in the **Position** field indicate the associated information, if any, in existing database records will not be modified.

Each Import file has at least one required field. If this field is not specified, the file import will not be completed. If the field is specified and is 'empty', the associated record will be rejected.

The Input File identifies text file to be loaded into the database. Clicking the Input File: button displays the "Importing to ..." window for you to select the file to import.



When you click Close or Import, the Data Map and Input File name are saved for the next time you import to the same Benchmate file.

Data Format

The input file, sample spreadsheet below, is composed of columns and rows.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
1	RECIDE	JOBID	EQID	BLDG	EQNAME	COMPL_DATE	LABOR_H	PRIORITY	LEAD_SH	METER_R	EST_LAB	EST_PAR	CAUSE_C	DOWN_T	PLANNEC	
2		18	PM-0009	72558	3	GUAGE, F	12/18/1998	180		METR	0	120	0	TEST	0	Y
3		1	RE-0001	CMP-1001		GAS COM	4/28/1998	60			0	0	0	TEST	0	N
4		2	RE-0002	CMP-1001		GAS COM	9/15/1997	2400			0	0	0		0	N
5		6	RE-0006	CMP-1001		GAS COM	5/4/1998	30			0	0	0		0	N

The first line of the spreadsheet or input file must contain the column headings to identify the column's information. It is not loaded into the database.

Importing Data Into Benchmate CMMS

You can import any or all columns in the Data Map **provided the required field is imported!** **Import** uses the required field as a 'key' to determine if a record matching the key is already in the Benchmate database. If it is, Import updates the existing record rather than loading a new one. Only the fields identified in the Data Map are loaded into the database. The remaining fields in the record being updated are not disturbed.

If the 'key' does not match an existing record, a new record is added to the Benchmate database.

Importing

When the Data Map and Input File entries are complete, click the **Import** button to load the Input file into the database. Counters show the number of records:

- Read – read from the Input file,
- Added – new records added,
- Updated – existing updated and
- Rejected – input records not accepted. Rejected records are written to an error file that has the same path and name as the input file except the extension has been renamed from 'txt' to 'err'. Records are usually rejected because the required field was empty.



```
EQSPARES.err - Notepad
File Edit Format View Help
EQID  PART NBR      COMP  QTY  COMP DESC
Could not find SPARES record for following PART NUMBER
CT-10  BELTxyz DRIVE  1
```

Sample Error Log

Specific File Requirements

Required Fields

The following table shows the required fields for each import file.

File	Required Field
BUILDING	Building Name
COMPONENTS	Component Code
COST CENTER	Cost Center Name
EQUIPMENT	Equipment ID
EQUIPMENT SPARES	Equipment ID & Part Number
EQUIPMENT TEXT	Equipment ID & Text
SERVICE LOG	Job ID
SERVICE LOG LABOR	Job ID

Importing Data Into Benchmate CMMS

SERVICE LOG COMENTS	Job ID & Text
SPARE PARTS	Part Number
VENDORS	Company Name
VENDOR NAMES	Company Name & Person's Name
VENDOR SPARES	Company Name & Part Number

Vendors and Vendor Names

Vendor information is imported in two passes. The same file can be used for each pass. The required field is **COMPANY NAME** and is used to import both the Company data and Personal data. You must import the Company data before you import Personal data (e.g.: names, phones, fax, email).

When importing Company data, Import will reject any entries with an empty **COMPANY NAME**. Before writing to the database, Import checks to see if the Company is already in the database. If it is, the record is modified. Only the designated columns are changed. If not, a new record is created.

When importing Personal data, Import will reject any entries with an empty **COMPANY NAME** or which does not match an existing Company record. When a matching Company is found, Import searches for Personal records matching the Name. If a matching Name is found, the Personal record is updated.) If not, a new record is added at the end of any existing names. (Only designated columns are changed.

Importing Data Into Benchmate CMMS

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