



Item Upload and Download Training Manual

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Table of Contents

Overview	3
Item / Stock Processing Desktop	3
Fields	4
Restricts.....	5
Clear Restricts	5
Download.....	6
Download Close	6
Access your file	7
Open in Excel.....	8
Made necessary changes to your file.....	10
Process Upd File	11



Overview

The Item Update routine allows users to process item update files for a single purchasing facility, the master facility, or all purchasing facilities, which includes the master facility. Depending on the format, these files can be used to upload new items or to update existing items. This document discusses the routines and workflow related to downloading the item dictionary and updating existing items.

Item / Stock Processing Desktop

MM.ROV - Item and Stock Processing Desktop - MM.ROV - Item and Stock Processing Desktop - (ROV TEST (N) - Test) - Salma Khan

Item

Active

Stocked

Description	Allergen/Hazardous
Common Name	1
Category	2
UNSPSC PO Type	3
Implantable	4
	5
	6

Enter/Edit Item

Process Upd File

View Item

Copy Item

Copy Status

Inactivate Item

Mass Edit Items

Pkg String Upd

Item Audit Trail

Item Download

Item Inquiry

Item Search

Lists

Dictionaries

Enter/Edit Stock

View Stock

Stock Inquiry

Stock Audit Trail

Stock Download

Stock Upload

Mass Edit Stock

Duplicate Stock

Initialize MM/OR

Item Data Vendor Data Alt Catalog Num UPN GTIN Reorder Vendors Contract Data ABC Status Quick Enter or Edit Stock Prev Num Next Num Prev Desc Next Desc Cancel



Fields

Here you can select the fields that you would like to download.

** It is important to note that there are certain fields that are required if you are going to upload this file back into MM. The Vendor, Vendor UP, Vendor Catalog Number and Facility are required for any vendor specific edits. If the cost is being changed the packaging string is required on the file.

MM.ROV - Item and Stock Processing Desktop - MM.ROV - Item and Stock Processing Desktop - (ROV TEST (N) - Test) - Salma Khan

Fields **Restricts**

Item Fields	
<input type="checkbox"/> Allergen Haz	<input type="checkbox"/> Form
<input type="checkbox"/> Category	<input type="checkbox"/> Implantable
<input type="checkbox"/> Common Name	<input type="checkbox"/> PO Type
<input checked="" type="checkbox"/> Description1	<input type="checkbox"/> Packaging
<input type="checkbox"/> Description2	<input type="checkbox"/> UNSPSC
<input type="checkbox"/> Ext Description	

Purchasing Facility Fields	
<input type="checkbox"/> Charge Code	<input type="checkbox"/> Patient EOC
<input type="checkbox"/> EOC	<input type="checkbox"/> Patient UI
<input type="checkbox"/> HCPCS	<input checked="" type="checkbox"/> Taxable
<input type="checkbox"/> Mark Up %	<input checked="" type="checkbox"/> Tax Code

Vendor Fields	
<input checked="" type="checkbox"/> Contract	<input type="checkbox"/> Vendor Order
<input checked="" type="checkbox"/> Contract Exp Date	<input checked="" type="checkbox"/> Primary
<input type="checkbox"/> Contract Group	<input checked="" type="checkbox"/> Vendor Cat Num
<input type="checkbox"/> Manufacturer	<input checked="" type="checkbox"/> Vendor Cost/UP
<input type="checkbox"/> Manufacturer Cat Num	<input checked="" type="checkbox"/> Vendor UP

Alternate Vendor/Manufacturer Fields	
<input type="checkbox"/> Alt Vend Cost UP	
<input type="checkbox"/> Alt Vend Manuf	
<input type="checkbox"/> Alt Vend Manuf Cat Num	
<input type="checkbox"/> Alt Vend UP	

Device Identification Fields	
<input type="checkbox"/> GTIN Unit	
<input type="checkbox"/> GTIN Manufacturer	

Clear Restricts **Cancel** **OK**

Enter/Edit Item
Process Upd File
View Item
Copy Item
Copy Status
Inactivate Item
Mass Edit Items
Pkg String Upd
Item Audit Trail
Item Download
Item Inquiry
Item Search
Lists
Dictionaries
Enter/Edit Stock
View Stock
Stock Inquiry
Stock Audit Trail
Stock Download
Stock Upload
Mass Edit Stock
Duplicate Stock
Initialize MM/OR



Restricts

On the restrict header tab you can restrict the items you would like to download. You can restrict by specific Items, Purchasing Facility, Vendor, Manufacturer, Contract, UNSPSC, HSPCS and Category.

The screenshot displays the 'Restricts' tab in a software application. The main window has a 'Restrict Output To' section with the following fields:

- Item: Empty list
- Purchase Facility: Empty list
- Vendor: Empty list
- Manufacturer: Empty list
- Contract: HP CL-2741ML-CA (selected)
- UNSPSC: Empty list
- HSPCS: Empty list
- Category: Empty list

A separate window shows a list of items with the following values:

- 023278
- 013934
- 015064 (selected)

Clear Restricts

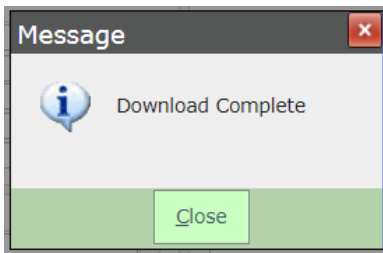
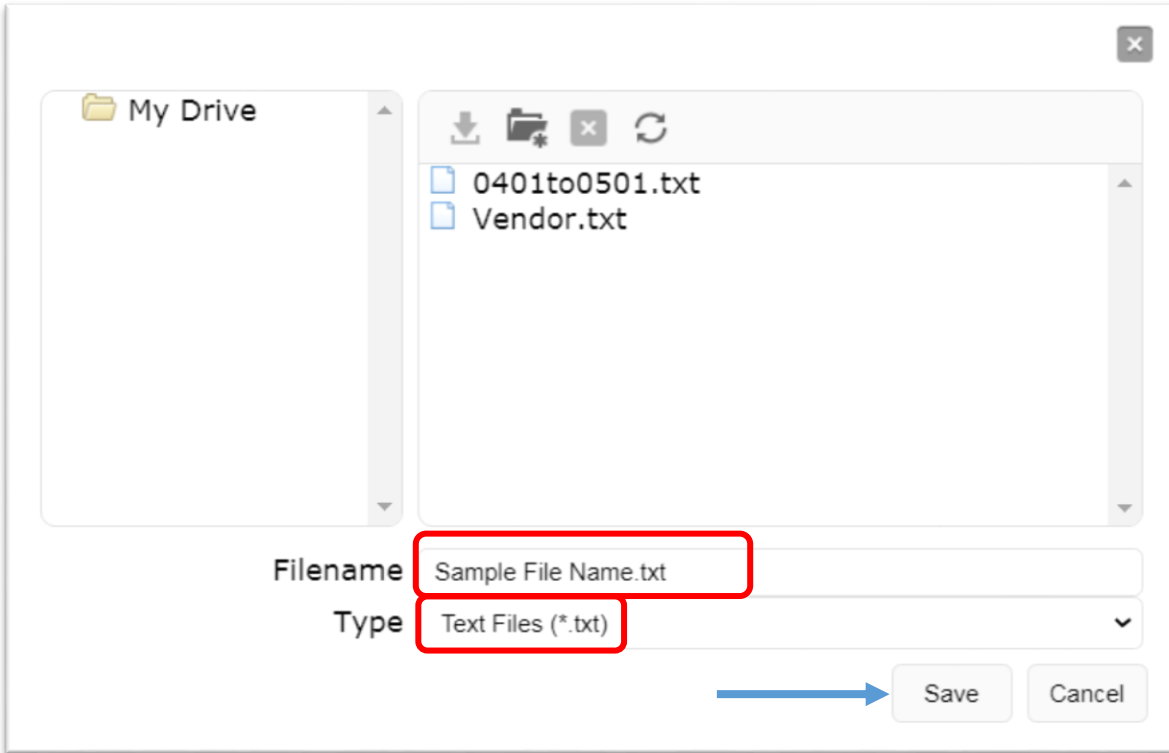
The Clear Restrict footer button can be used to clear all restricts that you have entered.

The footer area contains three buttons: 'Clear Restricts', 'Cancel', and 'OK'.



Download

Once all of the fields have been selected you can download the file by selecting the OK footer button. Then the Save As window will appear where the file can be saved. Save your files as a TXT.



Download

Close



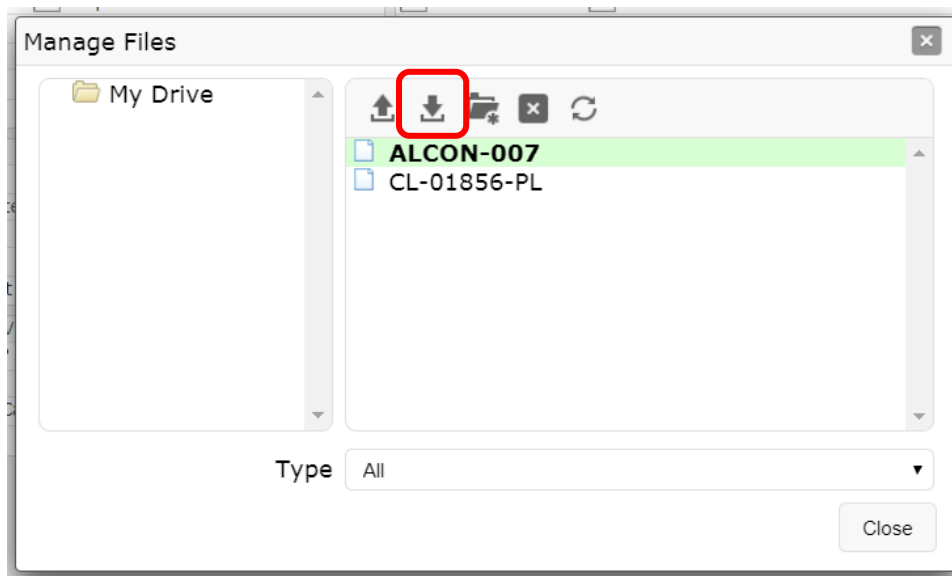
Access your file

The file can then be uploaded into a spreadsheet.

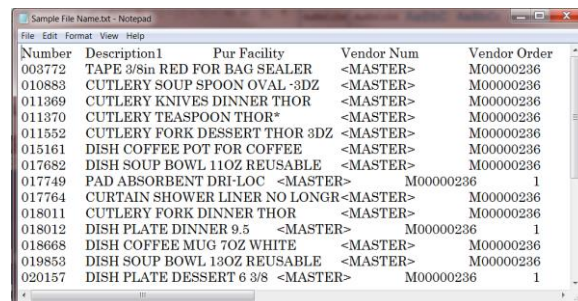
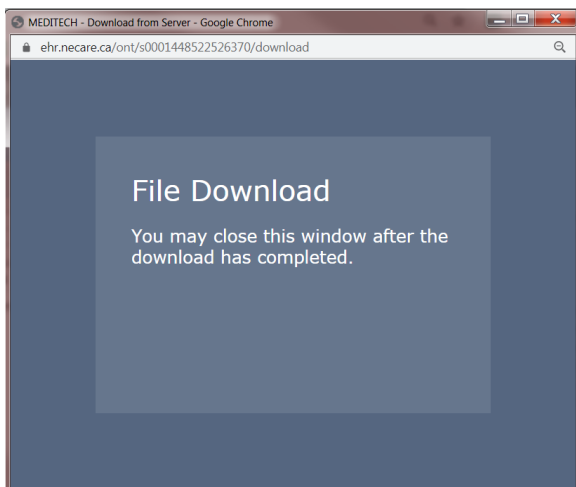


Select Utilities / Manage Files

Highlight the file you created, and click on download



The file should now open automatically as a text file in NotePad.



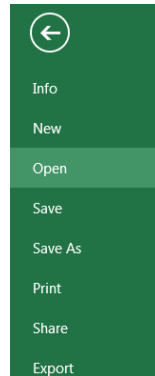
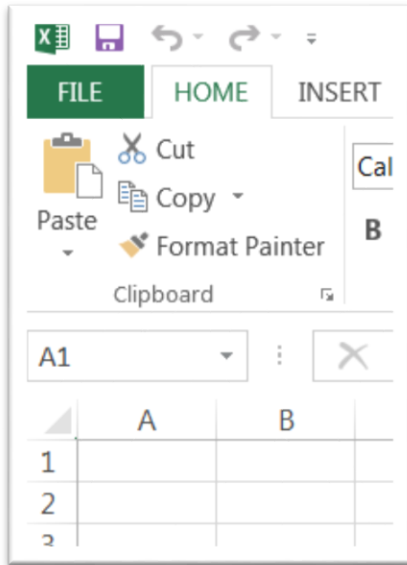
You can now close this file.

We will re-open this file in Excel.

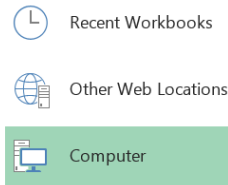


Open Excel

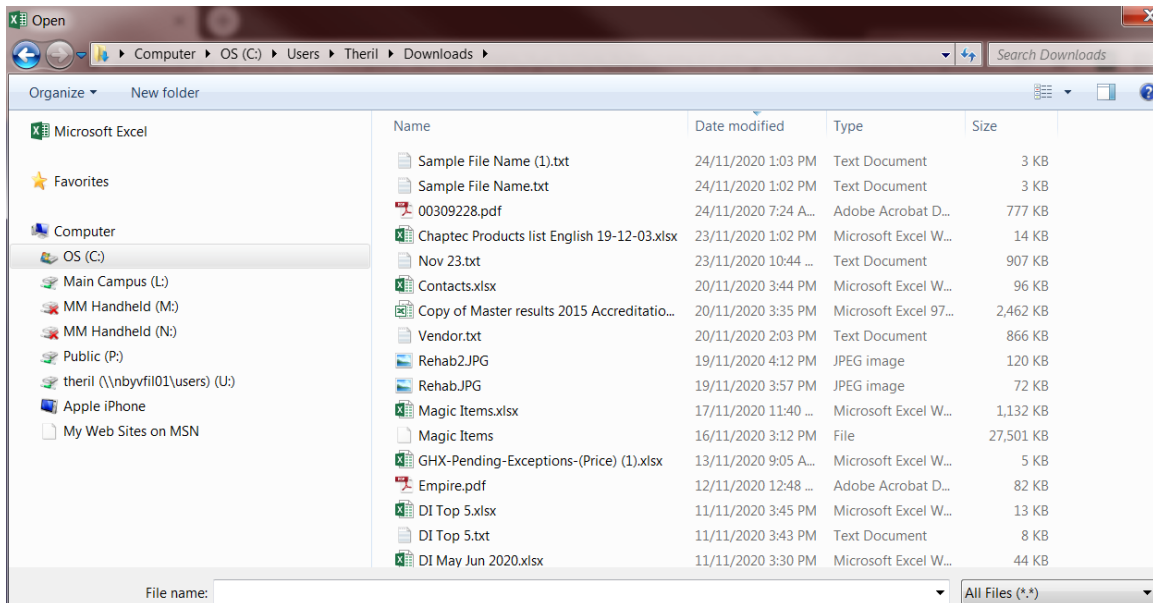
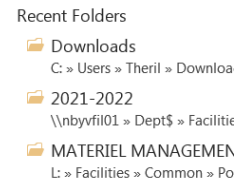
Under the 'File' tab select 'Open'



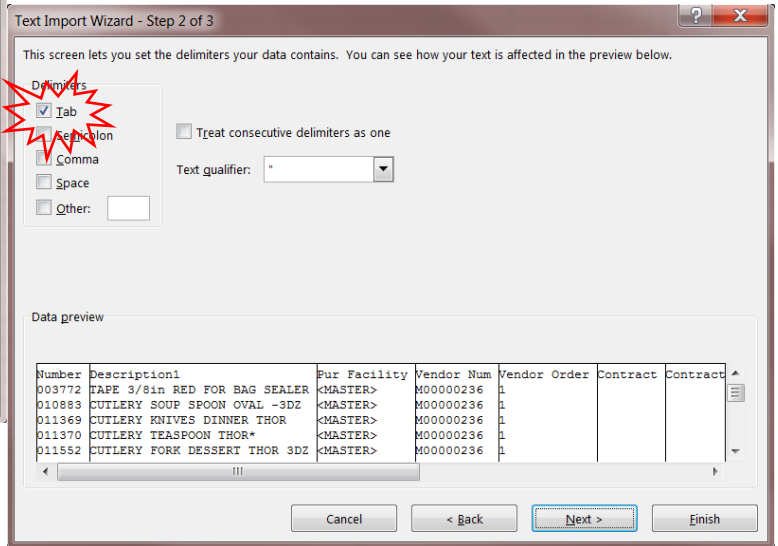
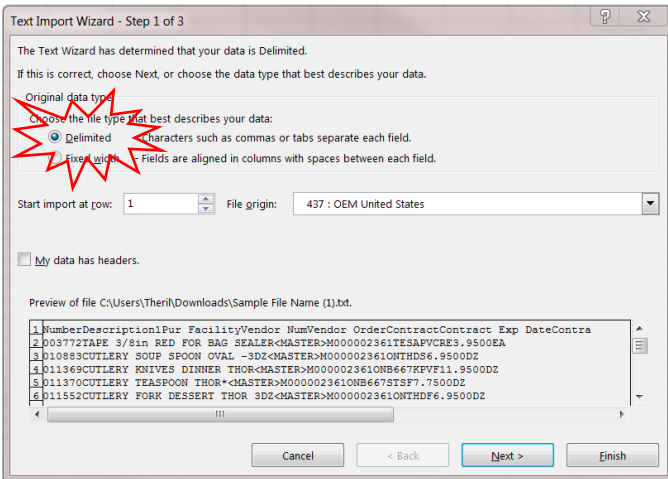
Open



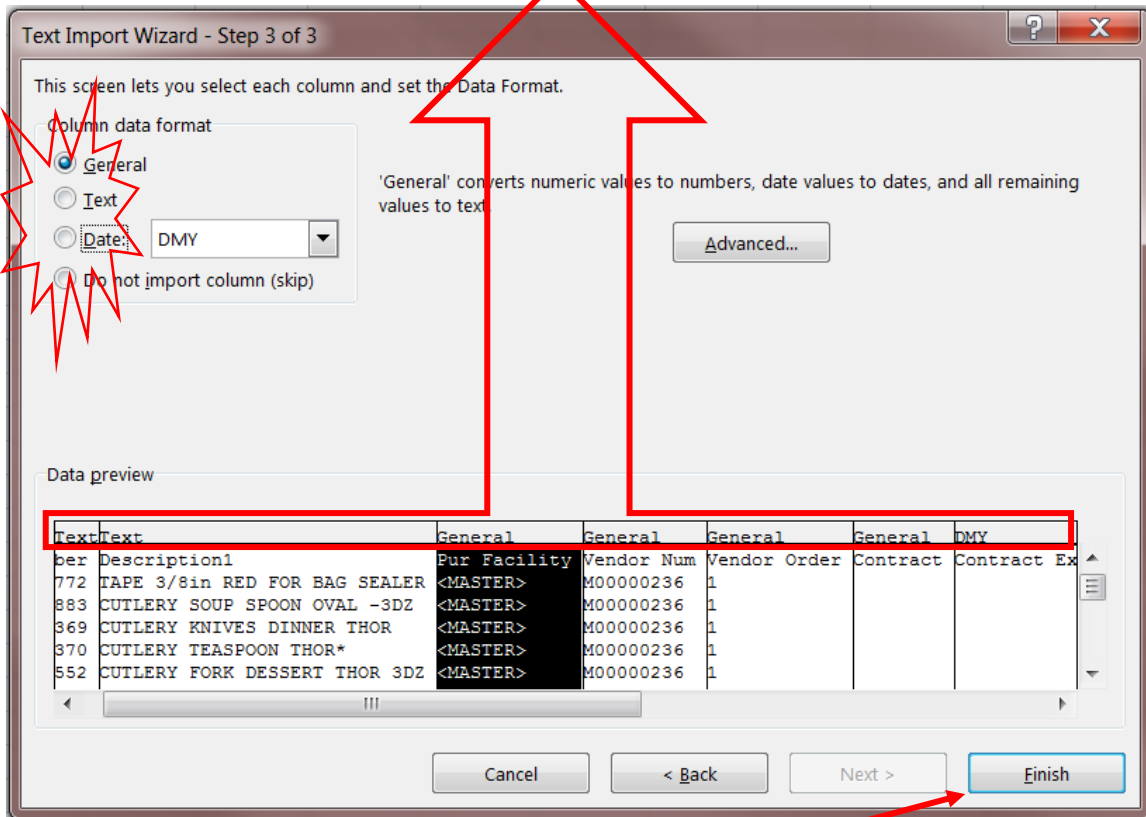
Computer



Open the file you are working with as a 'Delimited' file.



And then change the Column Data Format to 'Text' and 'Date' where applicable.



And then 'Finish'



Made necessary changes to your file

Any changes that need to be made can be made in the spreadsheet. In this example we will be replacing the 3M manufacturer to ABB. A find and replace can be done.

	A	B	C	D	E	F	G	H	I
1	Number	Pur Facility	Vendor Num	Manufacturer	Vendor Cat Nun	Vendor UP			
2	0000004	<MASTER>	A00003	3M	AMD622	CS			
3	0000115	<MASTER>	A00004	3M	4552.3				
4	0000241	<MASTER>	A00003	3M	365214				
5	0000374	<MASTER>	A00014	3M					
6	0000428	<MASTER>	A00038	3M					
7	0000468	<MASTER>	A00091	3M	12345				
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									

If you are removing data from a field you must replace it with **<Delete>** in order for Expanse to remove the data. Do not just delete the data.

Once the edits are made the file can be saved. File, Download As, Tab Separated values. In Excel the file can be saved as a Text (Tab Delimited) type.

Using the Item Upload routine does not allow a new vendor to be associated to an item, or have the Vendor Catalog Number, Packaging String and Facility changed. Those fields will need to be updated manually.

The file can now be uploaded back into MM to edit the items.



Process Upd File

Item Update - Vendor: Facility: Status: Empty Version: Upload Date: Lines:

Purchasing Facility [dropdown]
File Format [input]

Enter/Edit Item
Process Upd File
View Item
Copy Item
Copy Status
Inactivate Item
Mass Edit Items
Pkg String Upd
Item Audit Trail
Item Download
Item Inquiry
Item Search

Upon entry to the Item Update screen, you'll be prompted to enter the purchasing facility for which you want to process item update files. Select All

You will also have to select a file format, select Multi.
From the buttons at the bottom of your screen select Upload -

Purchasing Facility <ALL FACILITIES>
File Format Multi-Vendor

Select Upload Upload New Items List New Items Process Updates List File Errors List File Items List Results Delete Refresh Cancel

This footer button can be used to upload an item update file that contains edits for the Item Dictionary. Selecting the routine will launch a secondary screen that allows users to navigate to and select the file for upload. Click on Upload and choose the file from your computer that you want to upload

My Drive
Add Tax (5)
Expense Users
Remove Tax (3)

Filename
Type All

Open Cancel

MEDITECH - Upload to Server

File Choose File Remove Tax (4)
Name on Server Remove Tax (4)
Can contain only letters, numbers, dashes, underscores, and periods.

Upload Cancel

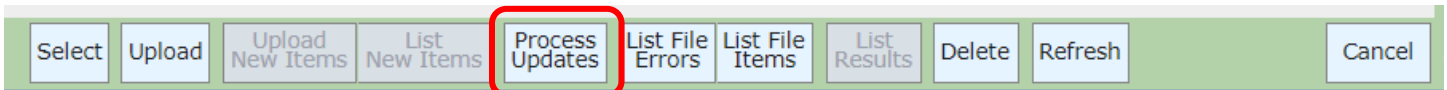
The file you have selected should down be ready to open.



PLEASE NOTE: Existing items will retain their current settings until the file status updates to COMPLETE. In the interim, users will not be prevented from pulling the item(s) into other MM routines.

List File Error: Use this routine to generate a report that will identify any errors within the item update file. After launching the routine, you'll be brought directly to the print destination screen.

If you have no errors and are ready to upload the file click on 'Process Updates' which will open a new screen listing all of the items, fields available to update.



MEDITECH Health Care Information System

Item Number	Facility	Alt	Item Field	Dictionary Value	Update Value	Variance
<input checked="" type="checkbox"/>	008171	<MASTER>	Desc Line 1	CATHETER IV ANGIO...	"CATHETER IV ANGI...	
<input type="checkbox"/>	008171	<MASTER>	Taxable	Y	N	
<input type="checkbox"/>	008171	<MASTER>	Tax Code	HST		
<input type="checkbox"/>	024848	<MASTER>	Taxable	Y	N	
<input type="checkbox"/>	024848	<MASTER>	Tax Code	HST		
<input type="checkbox"/>	025425	<MASTER>	Taxable	Y	N	
<input type="checkbox"/>	025425	<MASTER>	Tax Code	HST		

Item | Common Name | 008171 | BD382268

Description

Vendor

Vendor Catalog Number

Packaging String | Unit of Purchase | BX/10 EA

Cost Per UP

Contract | Expiration Date

Contract Group

Cancel Save

Select the lines you want to update.

MEDITECH Health Ca

4 of 7 Selected

Item Number	
<input type="checkbox"/>	008171 <MA
<input checked="" type="checkbox"/>	008171 <MA
<input checked="" type="checkbox"/>	008171 <MA
<input checked="" type="checkbox"/>	024848 <MA
<input checked="" type="checkbox"/>	024848 <MA
<input type="checkbox"/>	025425 <MA
<input type="checkbox"/>	025425 <MA

And click on 'SAVE'

A Confirmation screen will pop up advising that 'Only selected lines will be filed. OK?' Select Yes

Another message will display asking if you would like the changes to run in the background. Select Yes.

And finally you should receive a Message 'ITEM UPLOAD #__ will be run on a background job server.' Select Close.

You will be brought back original screen where you can select

