

Item Upload and Download Training Manual

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Table of Contents

verview
Item / Stock Processing Desktop
Fields
Restricts
Clear Restricts
Download
Download Close
Access your file
Open in Excel
Made necessary changes to your file
Process Upd File



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

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	S	tocked															Process Upd File
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	Des	cription								1		Allerg	en/Haz	zardous	5		Copy Item
	Com	nmon Nar	ne							2							Copy Status
		egory								3							Inactivate Item
		PSC PC) Туре							4							Mass Edit Items
	Imp	lantable								5							Pkg String Upd
										6							Item Audit Trail
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																	Item Inquiry
																	Item Search
																	Lists
																	Dictionaries
																	Dictionaries
																	Enter/Edit Stock
																	View Stock
																	Stock Inquiry
																	Stock Audit Trail
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																	Stock Upload
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																	Duplicate Stock
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			Alt Catalog	UPN	GTIN				Quick E		Prev			Next		Cancel	
	Data		Num						Edit S	DTOCK		Num	Desc	Desc			?∂⊜ɓ⊠∆



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.

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			_						
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			RESI	inces					E . (E
	√	Item Fields	`√		Ρ	urchasing Facility Fields			Enter/Edit Item
		Allergen Haz 🗌 Form		Charge Code		Patient EOC			Process Upd File
		Category 🗌 Implantable				Patient UI		_	View Item
		Common Name 🗆 PO Type		HCPCS [~	Taxable			Copy Item
	✓	Description1 🗌 Packaging		Mark Up %	✓	Tax Code			Copy Status
		Description2 🗆 UNSPSC							Inactivate Item
		Ext Description							Mass Edit Items
	v	Vendor Fields							Pkg String Upd
	~	Contract 🗌 Vendor Order							Item Audit Trail
	~	Contract Exp Date 🗹 Primary							Item Download
		Contract Group 🔽 Vendor Cat Num							Item Inquiry
		Manufacturer 🔽 Vendor Cost/UP							Item Search
		Manufacturer Cat Num 🗹 Vendor UP							
	v	Alternate Vendor/Manufacturer Fields	v		De	evice Identification Fields			Lists
		Alt Vend Cost UP		GTIN Unit					Dictionaries
		Alt Vend Manuf		GTIN Manufact	tun	er			Enter/Edit Stock
		Alt Vend Manuf Cat Num							View Stock
		Alt Vend UP							Stock Inquiry
									Stock Audit Trail
									Stock Download
									Stock Upload
									Mass Edit Stock
									Duplicate Stock
									Initialize MM/OR
		Clear Restricts					Cancel	OK	? ቆቆቆ⊠ለ



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.

			Restricts Output To					
Item		Purchase Facility	Vendor	Manu	facturer			
	Cont		UNS	PSC				
HP CL-2741ML-CA	НСР		Cate	gory				
							Fields	Restricts
								t Output To
		4			Ite	em	Purchase Facility	
					023278 013934 015064			

Clear Restricts

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

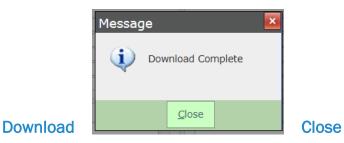




Download

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.

			×
My Drive	🗄 🛱 🛛 C		
	<pre>0401to0501.txt Vendor.txt</pre>		^
•		_	-
Filename	Sample File Name.txt]	
Туре	Text Files (*.txt)		~
	-		Save Cancel





Access your file

The file can then be uploaded into a spreadsheet.

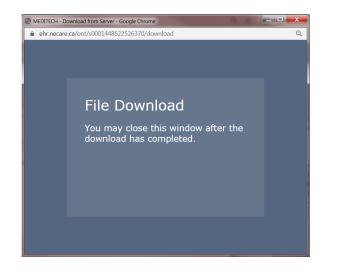
Return To MM.ROV - Item and Stock Processing Desktop (ROV TEST (N) - Test)

Select Utilities / Manage Files -

Highlight the file you created, and click on download

Manage Files			×
My Drive		C	
	ALCON-007		
	CL-01856-PL		
-			-
Туре	All		•
		Clos	se

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



Number	Description1	Pur Facility	Vendor Num	Vendor Order	
003772	TAPE 3/8in RED	FOR BAG SEALER	<master></master>	M00000236	
010883	CUTLERY SOUL	P SPOON OVAL -3DZ	<master></master>	M00000236	
011369	CUTLERY KNIV	ES DINNER THOR	<master></master>	M00000236	
011370	CUTLERY TEAS	SPOON THOR*	<master></master>	M00000236	
011552	CUTLERY FORM	K DESSERT THOR 3DZ	<master></master>	M00000236	
015161	DISH COFFEE I	POT FOR COFFEE	<master></master>	M00000236	
017682	DISH SOUP BOY	WL 110Z REUSABLE	<master></master>	M00000236	
017749	PAD ABSORBED	NT DRI-LOC <maste< td=""><td>R> M0000</td><td>00236 1</td><td></td></maste<>	R> M0000	00236 1	
017764	CURTAIN SHOW	VER LINER NO LONGE	R <master></master>	M00000236	
018011	CUTLERY FORI	K DINNER THOR	<master></master>	M00000236	
018012	DISH PLATE DI	NNER 9.5 <maste< td=""><td>R> M0000</td><td>00236 1</td><td></td></maste<>	R> M0000	00236 1	
018668	DISH COFFEE N	MUG 70Z WHITE	<master></master>	M00000236	
019853	DISH SOUP BOY	WL 130Z REUSABLE		M00000236	
020157	DISH PLATE DE	ESSERT 6 3/8 <maste< td=""><td>R> M0000</td><td>00236 1</td><td></td></maste<>	R> M0000	00236 1	
	III				

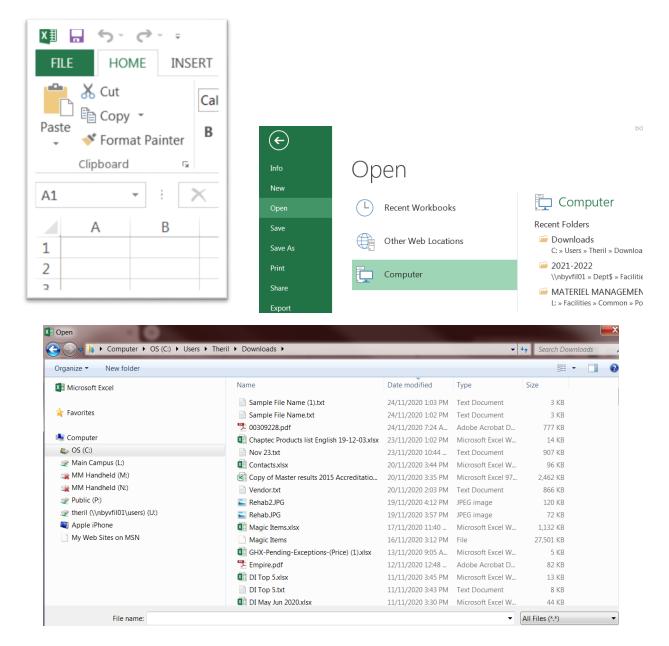
You can now close this file.

We will re-open this file in Excel.



Open Excel

Under the 'File' tab select 'Open'



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



Text Import Wizard - Step 1 of 3	
The Text Wizard has determined that your data is Delimited.	
If this is correct, choose Next, or choose the data type that best describes your data.	Text Import Wizard - Step 2 of 3
Original data type File data type Original data type Start import at gow: 1 Image: Original data type Original data type <td>This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below. Officiency of the second sec</td>	This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below. Officiency of the second sec
My data has headers.	Space Chargement
Preview of file C\Users\Theri\Downloads\Sample File Name (1).ht. i NumberDescription1Pur FacilityVendor NumVendor OrderContractContract Exp DateContra 2 b0037172AFE 3/96.n RED FOR BAG SEALER-GASTER-M0000023610TBAGE, 950002 3 b010370CUTLERY X01YES DINNER THORKASTER-M0000023610TBAGE, 950002 4 b11369CUTLERY KNIYES DINNER THORKASTER-M0000023610NB667RFV711.9500D2 6 b1159CUTLERY FORK DESSERT THOR 3D2-GASTER-M0000023610NHDF6.9500D2 4 III Cancel < Back Next Einish	Data preview Number Description1 Fur Facility Vendor Num Vendor Order Contract Contract 003772 TAPE 3/Sin RED FOR BAG SEALER (MASTER) MO0000236 L 010885 UTLENY SOUP SPOON OVAL -3D2 (MASTER) MO0000236 L 011369 UTLENY KINVES DINNER THOR (MASTER) MO0000236 L
	p11552 CUTLERY FORK DESSERT THOR 3DZ <master> M00000236 L + III + Cancel < Back</master>

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

Text Import Wizard - Step 3 of 3 This screen lets you select each column and	d set the Data Format.				2	X
	General' con rerts num ralues to text	_	mbers, date value: <u>A</u> dvanced	s to dates, a	nd all remainin	g
TextText	General	General	General	General	DMY	1
ber Description1 772 TAPE 3/8in RED FOR BAG SEA 883 CUTLERY SOUP SPOON OVAL -3 369 CUTLERY KNIVES DINNER THOM 370 CUTLERY TEASPOON THOR* 552 CUTLERY FORK DESSERT THOR	Pur Facility ALER <master> BDZ <master> R <master> <master></master></master></master></master>	Vendor Num M00000236 M00000236 M00000236 M00000236			Contract E	•
< III	Cancel	< <u>B</u> a	ck N	Vext >	► <u>F</u> inish	
	And the	en '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.

1		100% - §	§ % .0 _↓ .0 <u>0</u>	123 - Arial	- 10	- B I	÷ 4	<u>\</u>	53 -	≣ - 1	- 1+ - P
fx											
	A	B	С	D	E	F		G	н		T.
1	Number	Pur Facility	Vendor Num	Manufacturer	Vendor Ca	at Nun Vendor UP					
2	0000004	<master></master>	A00003	ЗМ	AMD622	CS					
3	0000115	<master></master>	A00004	ЗM	4552.3	-					
4	0000241	<master></master>	A00003	ЗM	365214						×
5	0000374	<master></master>	A00014	ЗМ		Find and replace					
8	0000428	<master></master>	A00038	ЗМ							
7	0000468	<master></master>	A00091	ЗМ	12345	Find	ЗМ				
8						Renlace with	Replace with ABB				
9						Replace with					
10	_					Search	All sheets \$				
11					_		Mato	h case			
12	-							h entire cell c	17.0.1105.015.10.0		-
13								ch using regu		sions Help	J
14					_		Also	search within	formulas		
15 16	-										-
15						Find	Repla	ce Repla	ace all	Done	
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.



	Vendor:		Version:	
Item Update -	Facility:		Upload Date:	
	Status:	Empty	Lines:	
		Purchasing Facility	▼	
				Enter/Edit Item
		File Format		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

	Purchasing Facility <all facilities=""></all>
You will also have to select a file format, select Multi. From the buttons at the bottom of your screen select Upload -	File Format Multi-Vendor

Select Opload New Items New Items Updates Errors Items Results Delete Reference	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) Expanse Users Remove Tax (3)		*
Ŧ			Ŧ
Filename			
Туре	All		•
		Open	Cancel

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

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



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	×
My Drive	🟦 🚋 🗵 C
	Add Tax (5) Expanse Users Remove Tax (3)
	Remove Tax (4)
Filename	Remove Tax (4)
Туре	All
	Open Cancel

Click on Open.

Once the upload is complete, the new file will appear at the bottom of the Item Update worklist, and the status will be OPEN. On the screen you will see the file name, date/time, status, status date, user, number of items on the file, number of rows on the file and number of errors on the file.

Item Update - 39	File Name: Facility: Status:	Remove T <all fac<br="">Open</all>			File Date/Time: Upload Date: File Rows	02/09/1 02/09/1 8			
		Purcha	sing Facility	<all facil<="" td=""><td>ITIES></td><td></td><td></td><td></td><td></td></all>	ITIES>				
		File Fo	rmat Mult	ti-Vendor					
File Name 👻	File D	ate/Time	Status	Status Date	User	Items	File Rows	Errors	
Remove Tax (4)	02/09/	19 1144	Open	02/09/19	THERLI01NB	8	8	0	
Select Uploa	d Upload New Item	s New Ite	ms Proces	s List File List Errors Ite	File List Results	Delete F	Refresh		Cance

Once you have an OPEN file in your work list, you can review it via the List Errors and List Items routines; and you can process it via the Process Updates routine.



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.

9	Select	Upload	Upload New Items	List New Items	Process Updates	List File Errors	List File Items	List Results	Delet	e Refresh		Cancel
ED:	ITECH Hea	lth Care Info	rmation System									
	008171	<master> <master></master></master>	Alt Item Field Desc Line 1 Taxable	Dictionary Value CATHETER IV ANGIO Y	Update Value CATHETER IV ANGI N	Variance		Select ⁻	the lin	ies you wa	nt to up	date.
	008171 024848 024848 025425	<master> <master> <master> <master></master></master></master></master>	Tax Code Taxable Tax Code Taxable	HST Y HST Y	N N							
	025425	<master></master>	Tax Code	HST				М	_	ECH Hea	lth Cai	
									4 of ✓	7 Selected Item Numl	ber	
	Item Comm	non Name 0	08171	BD382268						008171 008171	<ma <ma< td=""><td></td></ma<></ma 	
			D	escription						008171 024848	<ma <ma< td=""><td></td></ma<></ma 	
	Vendor Vendor Catalo Packaging Str Cost Per UP	og Number ing Unit of Pur	chase BX/10 B	Ā						024848 025425	<m <="" td=""><td></td></m>	
	Contract Ex Contract Grou									025425	<ma< td=""><td></td></ma<>	
						Cancel	Save					

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

Refresh	Cancel
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