

Batch File Uploader DQA



What is the Batch File Uploader DQA?

The Batch File Uploader DQA allows ePM users to upload a batch of **Source** and/or **Presentation** files in a single step. Users can also provide meta-data describing the files for upload using a standard Microsoft® Excel template. End users can use familiar Microsoft applications, such as Excel, as a method for creating or updating ePM documents.

Who Will Use This?

- ✓ General Contractor & Staff
- ✓ Construction Manager & Staff
- ✓ Architect/Engineer & Staff
- ✓ Project Manager & Staff
- ✓ GSA Contracting Officer & Staff

BUSINESS VALUE

- Easy-to-use, four step wizard for uploading metadata project design documents, catalog cards, or files
- Reduce training costs by providing users with a familiar way to input information into ePM applications
- Allows off-line data entry in easy to use Excel format
- Manages revisions
- Allows documents to be packaged as an Approval Package

To learn more about other Batch File Upload options in the user interface of ePM, reference the following:

QRG.090 Document Management Batch Creation Wizard

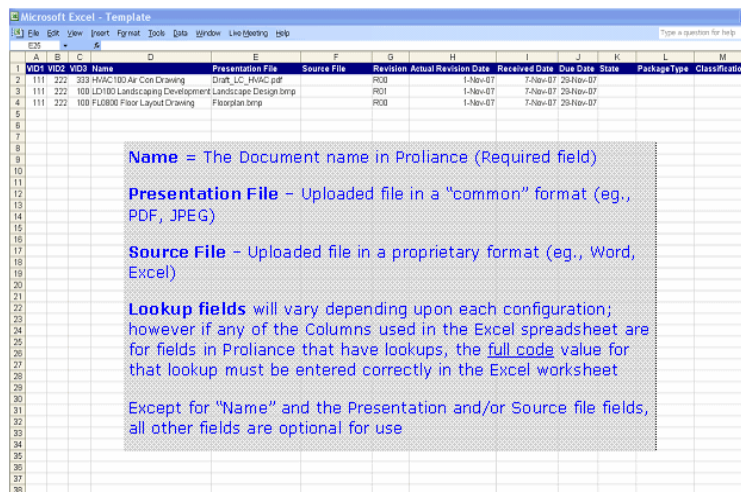
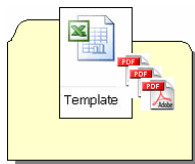
Overview

The PBS of GSA has (3) Master Excel Templates modified from the original DQA installed template. The fields on the spreadsheet are arranged in the order that appears in the ePM documents. Additionally, specific fields not used per document type are hidden in the spreadsheet and field labels are changed to “red” so it is easier to determine what needs to be filled out. Please consult with a Trainer or System Administrator to obtain any of the (3) standard templates as follows:

Document Type:	Master DQA Excel Template Name:
Catalog Cards	GSA CatalogCardsTemplate.xls
Design Documents	GSA Design Documents Template.xls
Submittals	GSA Submittals Template.xls

Other Benefits and Ground Rules:

- The Master Templates (.xls) are editable...
- ...however, the Column names must not be renamed or deleted
- The file(s) to be uploaded into ePM must be located in the same directory as the Uploader Excel spreadsheet
- Formulas can be used in the Template.xls to enforce naming standards
- Macros can be included such as the “automatic naming of the file” column macro included within this QRG



Launch DQA & Upload

1. Launch the File Uploader Utility from the Meridian Application Launcher or from the **Program Files|Meridian Systems|Proliance Desktop Quick Apps|File Uploader DQA**
2. Enter in the requested Login details: <https://epm.pbs.gsa.gov/Proliance>.

3. Select the Project where the files are to be uploaded.

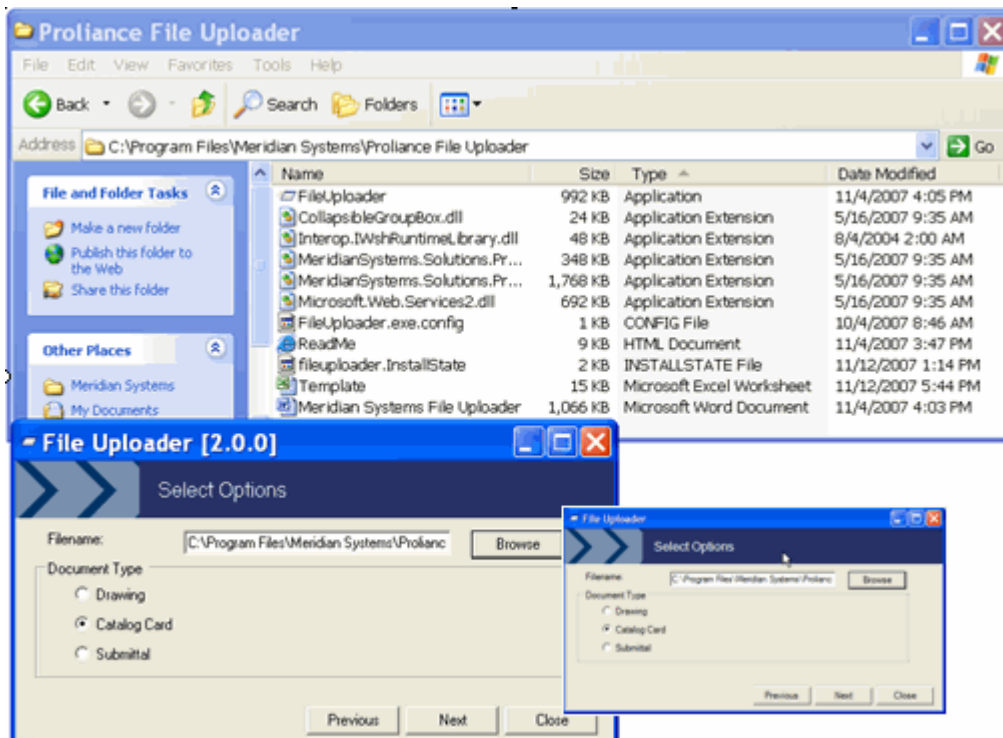
Number	Program	Title
1202	Region 3 - Mid-Atlantic Regi	PA-Philadelphia-Byrne Green Complex
1203	Region 11 - National Capital	DC-Washington-FOB 8 FB-R&A
1204	Region 3 - Mid-Atlantic Regi	WV-Huntington Federal Building-R&A
1205	Region 7 - Greater Southwe	TX-San Antonio-Hipolito Garcia Federa
1206	Region 3 - Mid-Atlantic Regi	WV-Charleston-Robert C. Byrd-FB & C
1208	Region 6 - Heartland Region	KS-Wichita CT-AH Replacement
1226	Region 1 - New England Re	MA, Boston J W McCormack Post Offic
1227	Region 10 - Northwest / Artic	OR-Portland-Hatfield CH-Courts 7th Fl
1228	Region 10 - Northwest / Artic	OR-Portland-EGWW FB-Sidewalk Rep
1229	Region 10 - Northwest / Artic	OR-Eugene FB-VHA Renovation

4. Click **Next**.

Note: Hold down the Ctrl key and click to select multiple projects at a time.

Launch DQA & Upload, cont.

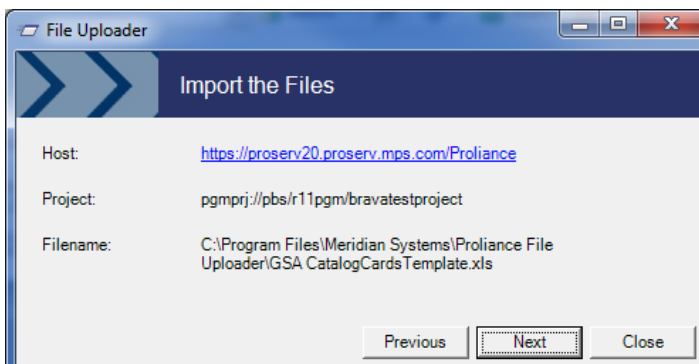
- Select the Document Type and the path for the Template (*.xls) file by clicking Browse to navigate to the file location.



IMPORTANT: Be sure to select the appropriate document type; Drawing Design Document, Catalog Card, or Submittal.

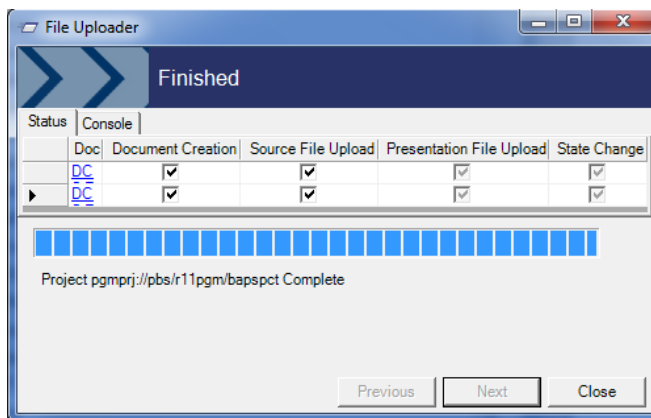
- Click **Next**.

A confirmation screen will appear recapping the Import details.



Launch DQA & Upload, cont.

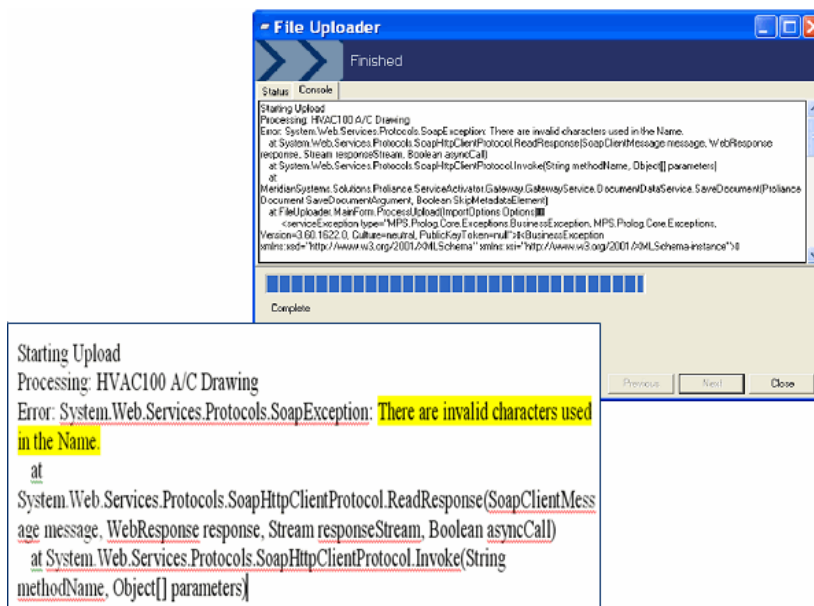
7. Click **Next**. A dialog will appear to show the files being processed. The status of each document is shown.



Important

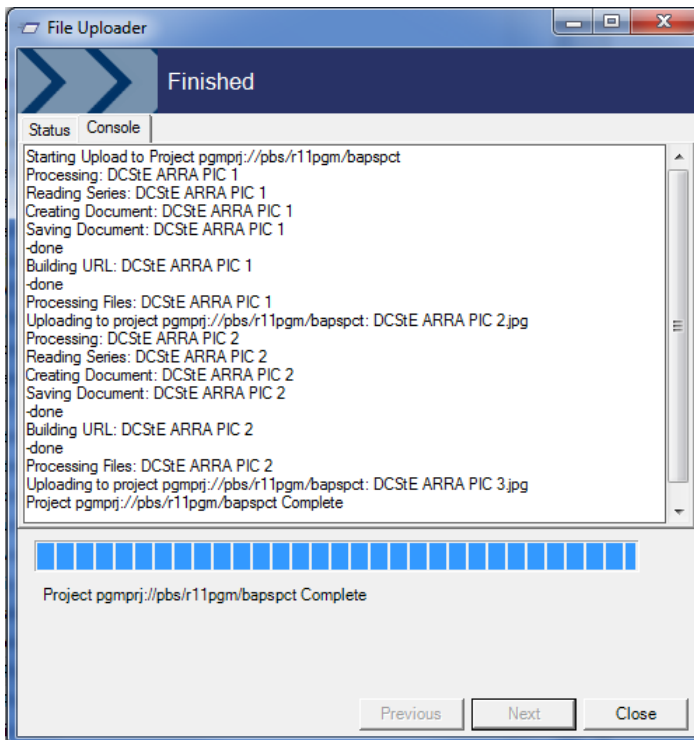
If any of the checkboxes are unchecked or are checked in gray, you will want to look at the **Console** tab to try to determine what was not processed and why.

In the example shown the error indicates the document **Name** field contained an invalid character (eg., a “/” in “A/C”). The Console log will often point out if an incorrect lookup value is being referenced, or if a value for a field such as the *Managing Company* or *Managing Contact* is not recognized.



Launch DQA & Upload, cont.

- If all files processed correctly, you will see a **Console** log that looks similar to the one below. It is a good idea to confirm the **Console** log before closing the dialog box.



- Click **Close**.
- Go to the Project in Proliance and confirm the documents are uploaded.

Number	Current State	Name	Source File Name	Revision	Creation Date
00001R00	Cancelled	Site 1	Site 1 - R00.jpg	R00	19-Mar-2011 10:06 PM
00001R01	Draft	Site 1	Site 1 - R01.pdf	R01	19-Mar-2011 10:10 PM
00003R00	Submitted	East View	East View - R00.jpg	R00	22-Mar-2011 9:56 AM
00003R01	Draft	East View	East View - R01.jpg	R01	22-Mar-2011 10:39 AM
00004R00	Draft	DCStE ARRA PIC 1	DCStE ARRA PIC 2.jpg	R00	28-Mar-2011 8:30 AM
00005R00	Draft	DCStE ARRA PIC 2	DCStE ARRA PIC 3.jpg	R00	28-Mar-2011 8:30 AM

VID1	State	Name	Source File	Presentation File	Revision	Notes
2	Draft	DCStE ARRA PIC 1	DCStE ARRA PIC 2.jpg		R00	
3	Draft	DCStE ARRA PIC 2	DCStE ARRA PIC 3.jpg		R00	

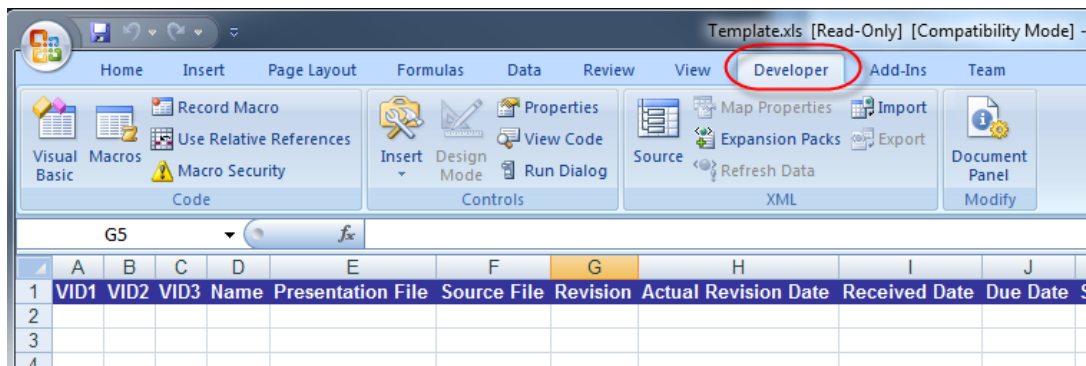
In this example, the user would confirm that the Photos uploaded using File Uploader are now located in **ePM | Applications | File Management | Catalog Cards | Photos** register.

Excel Macro to populate the filenames

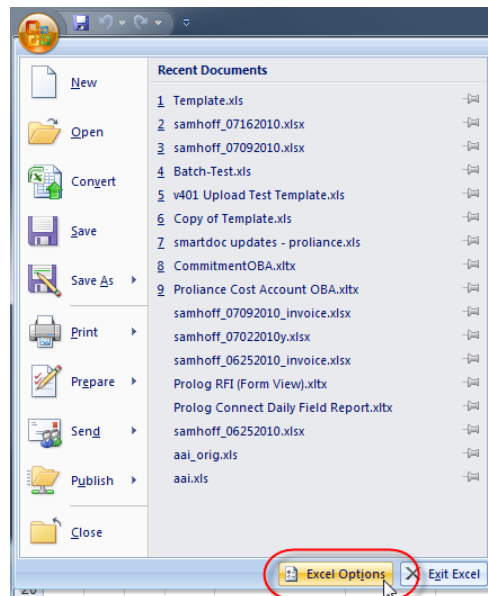
This section describes how to create a macro in Excel which will allow automatic population the file column of the Template.xls worksheet based on files existing within the same directory as Template.xls.

Create the Macro in Microsoft Excel 2007

1. If the **Developer** tab is not available, then follow these instructions to enable it:

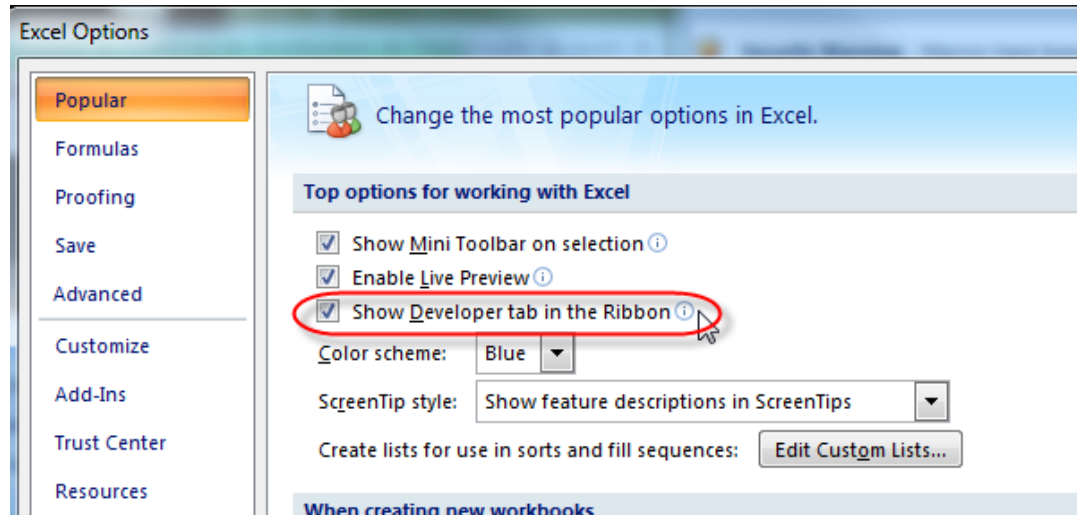


- a. Click the **Microsoft Office Button**
- b. Click **Excel Options**



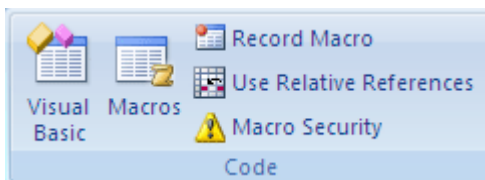
Excel Macro to populate the filenames, cont.

- c. In the **Popular** category, under **Top options for working with Excel**, select the **Show Developer tab in the ribbon** check box



- d. Click **OK**

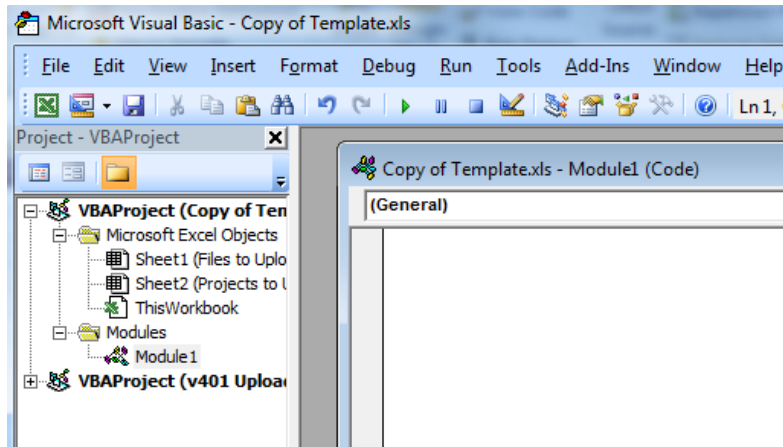
2. On the **Developer** tab, in the **Code** group, click **Visual Basic**.



3. A new application will appear named **Microsoft Visual Basic**.

Excel Macro to populate the filenames, cont.

4. If there is not an empty **Module** Document, then click **Insert → Module**



5. In the **Module Document** window, type (or copy and paste from this document) the following:


```
Sub ListFiles()

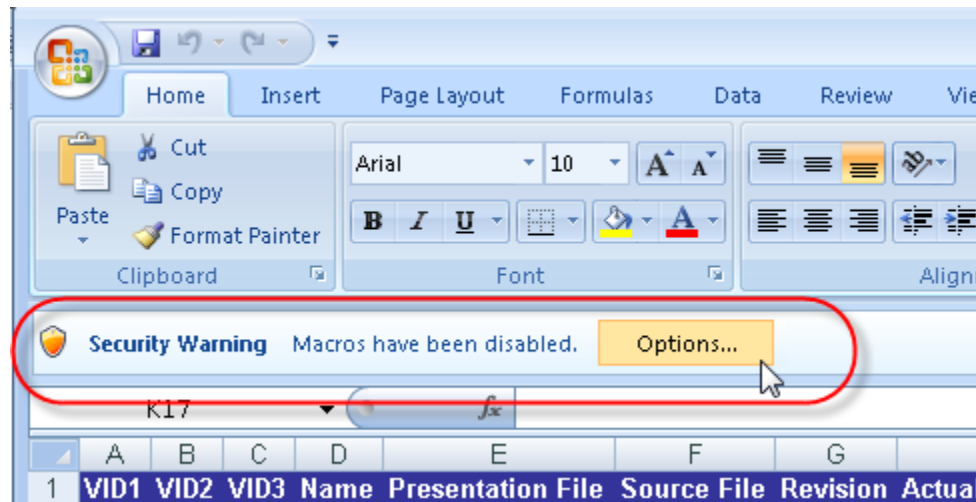
    Dim path As String
    Dim Msg As String
    Msg = "Please enter the file extension to map on."
    Msg = Msg & " (Eg. *.* , *.doc , *.pdf,...)",
    path = ActiveWorkbook.path
    Dim fileExt$
    fileExt$ = InputBox(Msg,"File Extension", "*.pdf")
    path = path & "\" & fileExt$
    Dim F
    F = Dir(path)
    Do While Len(F) > 0
        ActiveCell.Formula = F
        ActiveCell.Offset(1, 0).Select
        F = Dir()
    Loop
End Sub
```

Excel Macro to populate the filenames, cont.

Modifying the Security Settings.

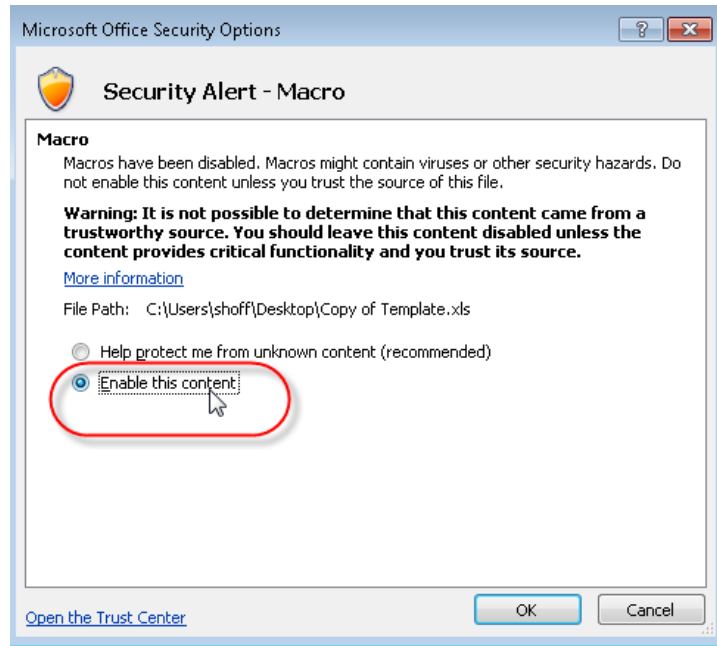
In most cases, the Microsoft Excel security settings will need to be configured to allow **macros** to run in Excel.

1. Click the Office Button 
2. Select **Excel Options**.
3. Select **Trust Center > Trust Center Settings**
4. Select the **Macro Settings** radio button.
5. Select either "**Disable all macros with notification**" or "**Enable all macros**".
 - a. Selecting "**Disable all macros with notification**" will allow the macro to run, as long as the user specifically allows it when the worksheet is opened.
 - i. In this case, to allow Macros, the user needs to click on the "**Options...**" button, which is presented underneath the ribbon.



Excel Macro to populate the filenames, cont.

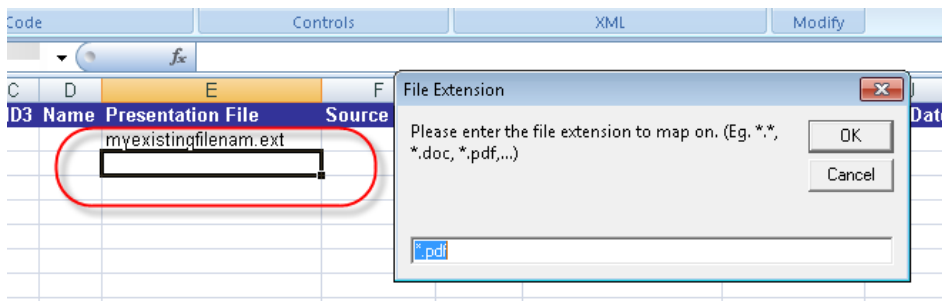
- ii. Then, select "Enable this content" in the dialog displayed.



Running the Macro

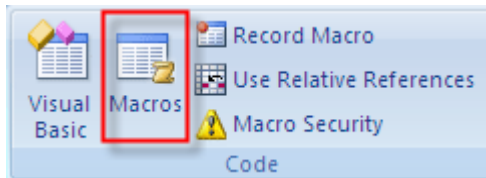
Now that the macro has been created and is available, it can be used.

1. First, ensure that all files to be included are in the same folder as the Template.xls file.
2. Select the cell where you would like the **first filename** to appear. Others will appear below this one. This is usually the first empty cell under either the **source file** or **presentation file** heading rows. However, in cases where there are existing entries in these columns in may be the first available cell in one of these columns.

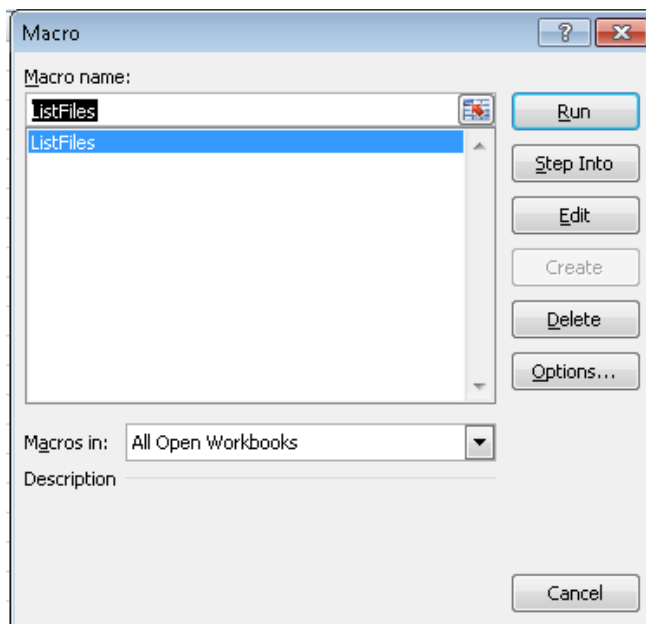


Excel Macro to populate the filenames, cont.

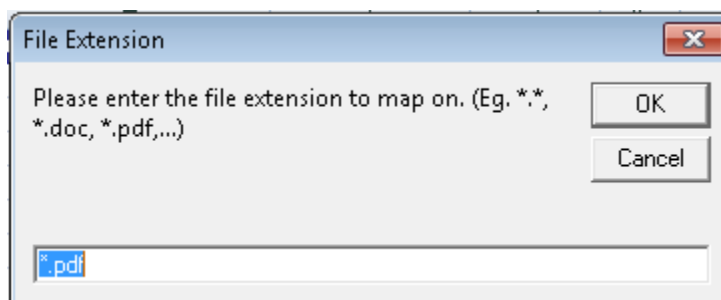
- Then, on the **Developer tab**, click **Macros**



- Ensure that "**ListFiles**" is selected. Click **Run**



- A prompt will ask for the file extension. Only files with the selected extension will be selected. Only **one** extension may be entered at a time (ie. "*.pdf, *.xls" will not work). *.* may be entered if all files are to be selected.



Excel Macro to populate the filenames, cont.

- Done! the files should now be listed. Note that we could click on Macros and select run again, this time entering a different extension in order to include further files with different extensions

	A	B	C	D	E	F	G	H
1	VID1	VID2	VID3	Name	Presentation File	Source File	Revision	Actual Rev
2					myexistingfilenam.ext			
3					file1.pdf			
4					file2.pdf			
5					file3.pdf			
6								
7								

Tips

- To learn more about all GSA – ePM DQA's, go to:
<http://www.meridiansystems.com/epminfo/obas/index.asp>
- Some fields on the templates are hidden and the Field Label text is changed to “red”. This means the document type for ePM doesn't use those fields but they must exist for the utility to work