Import / Export Interface

The import / export interface allows users to perform bulk inserts, updates and deletions on the data stored in Lifespan Web.

The interface is broken down into the following four sections:

- Lookups. This section looks at the lookup data which populate the drop down lists for Property Attributes and works.

- Analysis Groups. This section looks at Property, Attribute and work groups. These groups are primarily used for reporting and filtering purposes.

- Core Information. This section looks at Property addresses, property attributes and works and calendar items.

- Module Information. This section looks at data stored in the various modules, Asbestos, compliance, Documents, FRA and ALR.

Access the interface by clicking ImportExport from within the Property Attributes module. See figure 1.
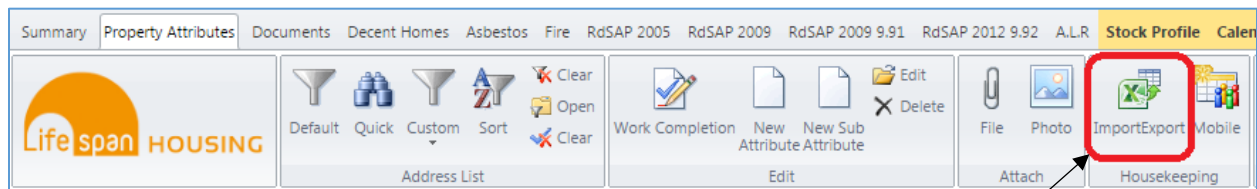

Figure 1.

Click ImportExport

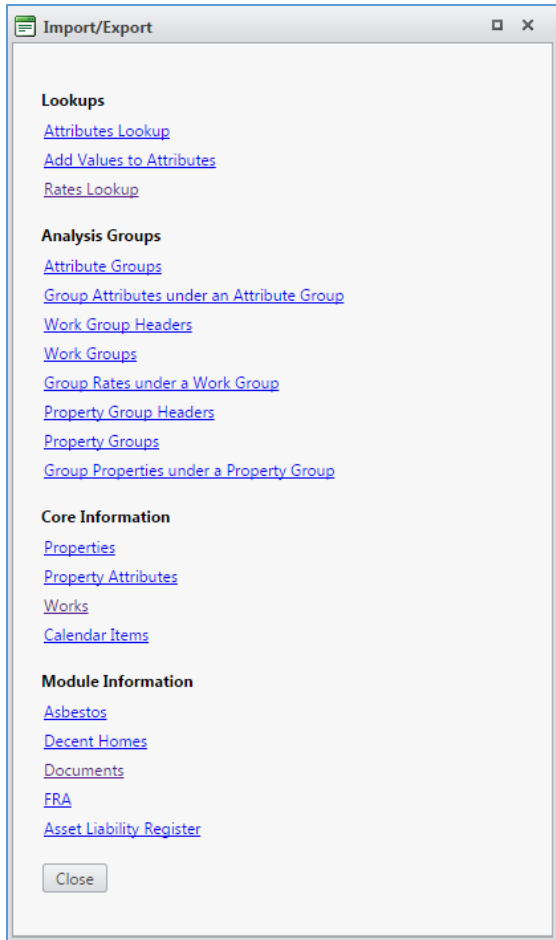The interface pops up in a separate screen. See figure 2.

Figure 2.

Lookups

The lookups sections allow users to insert, update or delete from the Property Attributes and Schedule or Rates lookup tables.

Attribute Lookup

Attribute lookup allows users to insert, update and delete property attributes.
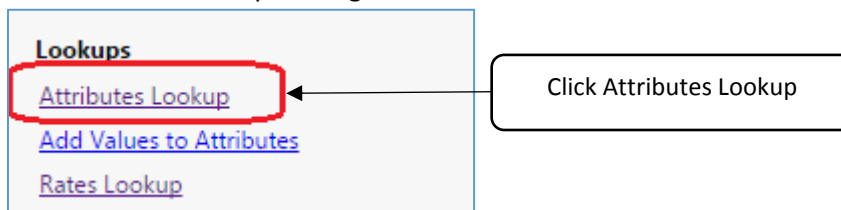
1) Click Attribute Lookup. See figure 3.

Figure 3.

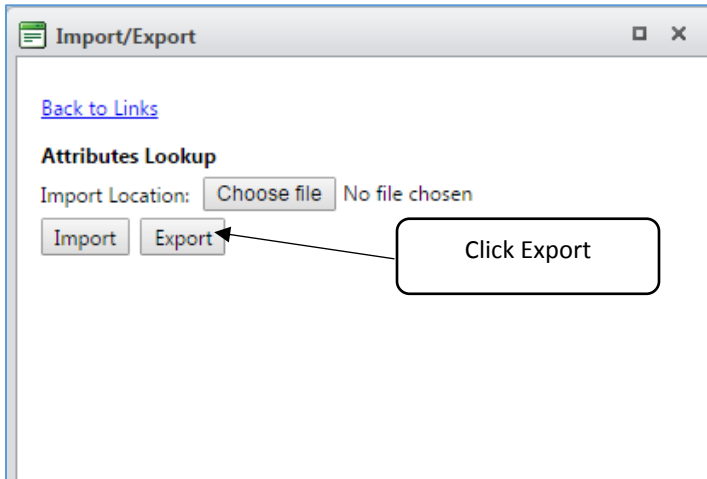2) To view the existing property attributes, click Export then open the spread sheet that is generated. See figure 4.

Figure 4.

3) Figure 5 below demonstrates the spread sheet that is generated by clicking export.

Name	DataType	IsPickList	ListOrder	IsCloneable	IsMobile	Command	UpdateToNewName
Accomodation Type	FreeText	TRUE	0	TRUE	TRUE		
Additional WC	FreeText	TRUE	1	TRUE	TRUE		
Air Source Heat Pump	FreeText	TRUE	2	TRUE	TRUE		
Area office	FreeText	TRUE	0	TRUE	TRUE		
Asbestos Present	FreeText	TRUE	0	TRUE	TRUE		

Figure 5.

- Name – This is the name of the attribute.
- DataType – This is the type of attribute. There are 2 types, FreeText or Date. Unless the value will be a date then you should enter FreeText here.
- IsPickList – This specifies if the values should be selected from a pick list, or be a free text input. Select True for Yes or False for No.
- Listorder – This is the sort order.
- IsCloneable – This specifies if the attributes can be copied via the copy facility in Lifespan. Select True for Yes or False for No.
- IsMobile – This specifies if the attributes can be collected / edited in Lifespan Mobile. Select True for Yes or False for No.
- Command – This is the action you wish to carry out. The commands will be explained during No.4 Below.
- UpdateToNewName – Use this field to rename the attributes.

4) Make the required changes and save the spread sheet to your computer. In figure 6 below I have highlighted a row in which I wish to add a new attribute named "Test Attribute". The command column must cannot be left blank even if you are not changing the values on a row. You will see that I have updated the Command column for the rows that have not been changed.

Name	DataType	IsPickList	ListOrder	IsCloneable	IsMobile	Command	UpdateToNewName
Accomodation Type	FreeText	TRUE	0	TRUE	TRUE	Ignore	
Additional WC	FreeText	TRUE	1	TRUE	TRUE	Ignore	
Air Source Heat Pump	FreeText	TRUE	2	TRUE	TRUE	Ignore	
Area office	FreeText	TRUE	0	TRUE	TRUE	Ignore	
Asbestos Present	FreeText	TRUE	0	TRUE	TRUE	Ignore	
Test Attribute	FreeText	TRUE	3	TRUE	TRUE	Insert	

Figure 6.

you must use one of the commands below:

- Insert – Use this if you are inserting new attributes.
- Update – Use this if you are changing existing attributes.
- Delete – Use this if you wish to delete existing attributes.
- Ignore – Use this if you are not changing existing attributes. Note you may also wish to delete the entire row instead of using Ignore.

5) Click Choose File then browse your computer for the spread sheet you have just saved. Next click Import. See figure 7.
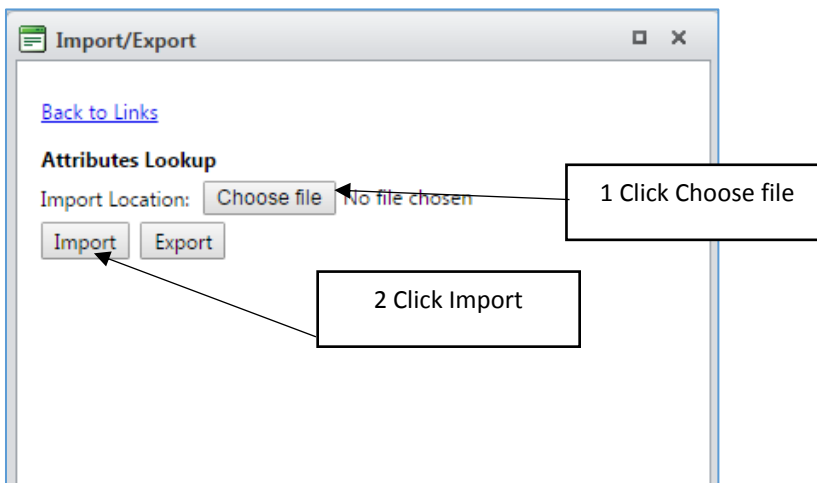

Figure 7.

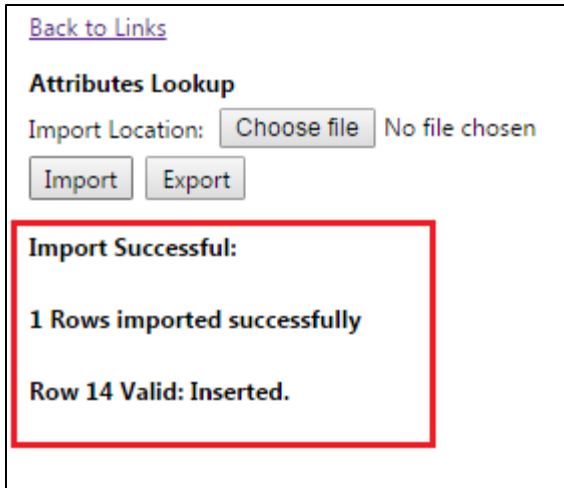6) The next screen will tell you if the import was successful. See figure 8.

Figure 8.

If the import was unsuccessful the software will tell you which rows failed to import and the reason why.

Add Values to Attributes

Add Values to Attributes allows the user to add / edit or delete property attribute lookup values.
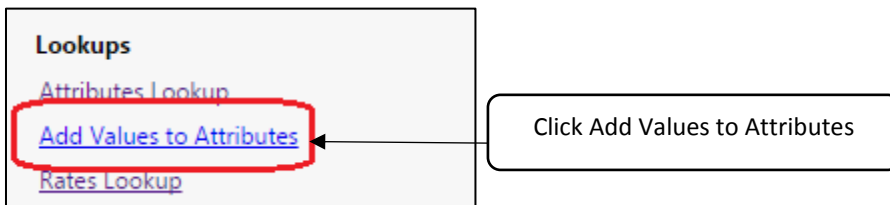
1) Click Add Values to Attributes. See figure 9.

Figure 9.

2) To view the existing property attributes values, click Export then open the spread sheet that is generated. See figure 10.
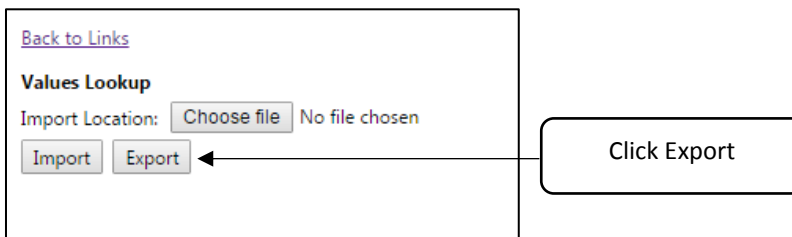

Figure 10.

3) Figure 11 below demonstrates the spread sheet that is generated by clicking export.

Attribute	Name	Command	UpdateToNewName
Accomodation Type	?B?P?		
Accomodation Type	0B0PB		
Accomodation Type	0B0PG		
Accomodation Type	0B0PH		
Accomodation Type	0B0PR		

Figure 11.

- Attribute – This is the name of the Property Attribute. It must already exist under "Attributes Lookup".
- Name – This is the name of the values in the drop down lists.
- Command – This is the action you wish to carry out.
- UpdateToNewName – Use this field to rename the existing values.

4) Make the required changes and save the spread sheet to your computer. In figure 12 below I have highlighted a row in which I wish to add a value to the attribute named "Test Attribute". The command column must cannot be left blank even if you are not changing the values on a row. You will see that I have updated the Command column for the rows that have not been changed.

Attribute	Name	Command	UpdateToNewName
Accomodation Type	?B?P?	Ignore	
Accomodation Type	0B0PB	Ignore	
Accomodation Type	0B0PG	Ignore	
Accomodation Type	0B0PH	Ignore	
Accomodation Type	0B0PR	Ignore	
Test Attribute	Test Value	Insert	

Figure 12.

you must use one of the commands below:

- Insert – Use this if you are inserting new values.
- Update – Use this if you are changing existing values.
- Delete – Use this if you wish to delete existing values.
- Ignore – Use this if you are not changing existing Values. Note you may also wish to delete the entire row instead of using Ignore.

5) Click Choose File then browse your computer for the spread sheet you have just saved. Next click Import. See figure 13.
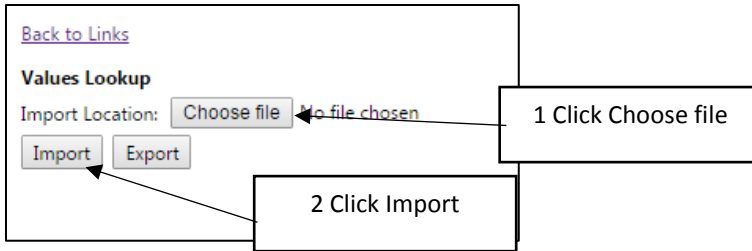
Figure 13.

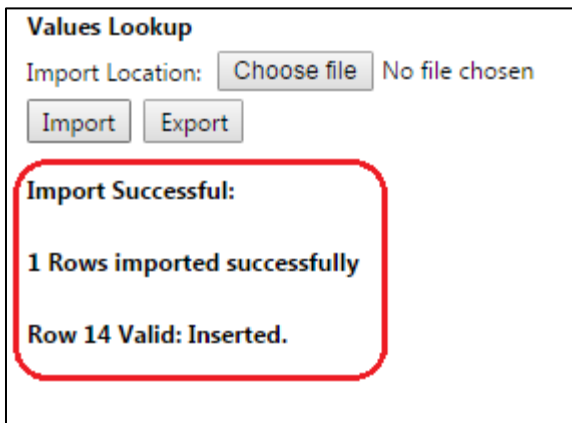6) The next screen will tell you if the import was successful. See figure 14.

Figure 14.

If the import was unsuccessful the software will tell you which rows failed to import and the reason why.

Rates Lookup

Rates lookup allows users to add, edit and delete components in the schedule of rates.
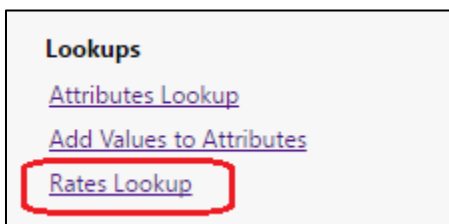
1) Click Rates Lookup. See figure 15.

Figure 15.

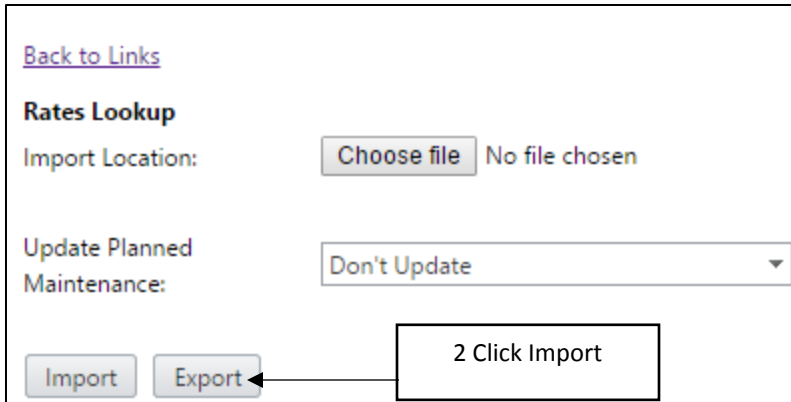2) To view the existing property rates, click Export then open the spread sheet that is generated. See figure 16.

Figure 16.

3) Figure 17 below demonstrates the spread sheet that is generated by clicking export.

Reference	Collection	Description	Cost	Life	Uom	RateType	LifeUnit	Command	UpdateToNewReference
123	Complete Kitchen - 2 Bed	Fittings & Finishes	3700	20	Item	Installation	Y		
124	Complete Kitchen - 1 Bed	Fittings & Finishes	3500	20	Item	Installation	Y		
125	Complete Kitchen - 3 Bed	Fittings & Finishes	3900	20	Item	Installation	Y		
126	Complete Kitchen - 4 Bed	Fittings & Finishes	4500	20	Item	Installation	Y		
127	Complete Kitchen - 5 Bed	Fittings & Finishes	4500	20	Item	Installation	Y		

Figure 17.

- Reference – the unique reference number for the component.
- Collection – The item description of the component.
- Description – The material of the component.
- Cost – The replacement cost of the component.
- Life – the component lifecycle.
- UOM – Unit of measurement
- RateType – Field used for filtering and reporting.
- LifeUnit – Specifies if the lifecycle represents Years or Months
- Command – This is the action you wish to carry out.
- UpdateToNewName – Use this field to rename the existing components.

4) Make the required changes and save the spread sheet to your computer. In figure 18 below I have highlighted a row in which I wish to add a value to the attribute named "Test Component". The command column must cannot be left blank even if you are not changing the values on a row. You will see that I have updated the Command column for the rows that have not been changed.

Reference	Collection	Description	Cost	Life	Uom	RateType	LifeUnit	Command	UpdateToNewReference
123	Complete Kitchen - 2 Bed	Fittings & Finishes	3700	20	Item	Installation	Y	Ignore	
124	Complete Kitchen - 1 Bed	Fittings & Finishes	3500	20	Item	Installation	Y	Ignore	
125	Complete Kitchen - 3 Bed	Fittings & Finishes	3900	20	Item	Installation	Y	Ignore	
126	Complete Kitchen - 4 Bed	Fittings & Finishes	4500	20	Item	Installation	Y	Ignore	
127	Complete Kitchen - 5 Bed	Fittings & Finishes	4500	20	Item	Installation	Y	Ignore	
999	Test Component	Test material	1000	10	Item	Installation	Y	Insert	

Figure 18.

you must use one of the commands below:

- Insert – Use this if you are inserting new components.
- Update – Use this if you are changing existing components.
- Delete – Use this if you wish to delete existing components.
- Ignore – Use this if you are not changing existing Components. Note you may also wish to delete the entire row instead of using Ignore.

5) Click Choose File then browse your computer for the spread sheet you have just saved. Next click select if you wish to update the existing planned maintenance data. See Figure 19.
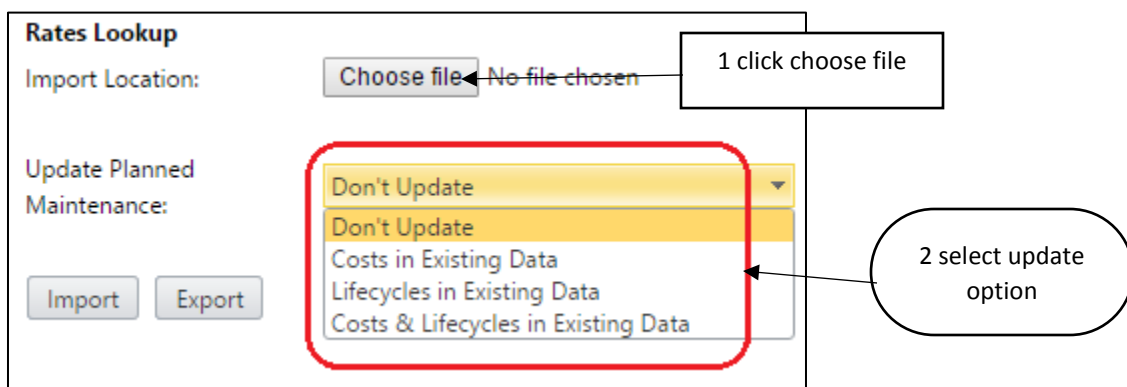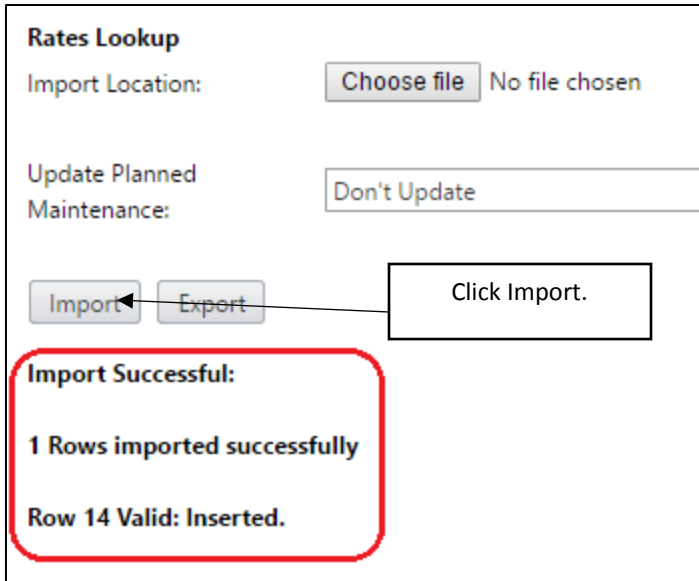
Figure 19.

- Don't Update – this option doesn't update existing planned maintenance data.
- Costs in existing data – Use this option if you have updated component lifecycles and wish to update existing planned maintenance data.
- Lifecycles in existing data – use this option if you have updated component life cycles and wish to update existing planned maintenance data.
- Costs & Lifecycles in existing data. Use this option if you have updated both component costs and lifecycles and wish to update existing planned maintenance data.

7) Click Import. The next screen will tell you if the import was successful. See figure 20.

Figure 20.

If the import was unsuccessful the software will tell you which rows failed to import and the reason why.