Data onboarding

Planon Software Suite

Version: L100

About this Document

Intended Audience

This document is intended for *Planon Software Suite* users.

Contacting us

If you have any comments or questions regarding this document, please send them to: support@planonsoftware.com.

Document Conventions

Bold
Names of menus, options, tabs, fields and buttons are displayed in bold type.

Italic text
Application names are displayed in italics.

CAPITALS
Names of keys are displayed in upper case.

Special symbols

💡	Text preceded by this symbol contains additional information or a tip.
⚠️	Text preceded by this symbol is intended to alert users about consequences if they carry out a particular action in Planon.
📑	Text preceded by this symbol refers users to other parts of the user documentation for more information.

Table of Contents

About Data import

Data import enables customers to gather and import data into Planon easily. The tools involved in this process are easy to use and require no knowledge of XML nor specific Planon configuration skills.

Data import - Concepts

The following sections list the concepts in **Data import**:

- Definition
- Template
- Data sheet

Definition

A ready to use import definition for onboarding data, which comes with a template (Excel) provided by Planon.

Template

A template (Excel) that can be used to import data into Planon.

When opened in Excel, a specific layout will be visible showing all fields of the layout and their properties, guidelines that will help you when filling out the data.

The cell colors used in the sheet have a specific meaning.

- Green: field properties.
- Red: mandatory field/part of ID field.
- Yellow: specific format is required (picklists). When hovering your mouse over the field, the possible values will be displayed in a tooltip.
- Blue: field name.
- Orange: fields that are needed to set a reference. All fields should be filled in to be able to set the reference.

Do not edit the header, this information is required for the import.

Amount fields in Excel

Data sheet

The template file that is completed with data that you want to import into Planon. This file must comply with the field properties of the template. When completed, you can upload the data sheet in **Data import** TSI.

Do not edit the header, this information is required for the import.

Amount fields in Excel

Working with Data import

The following topics describe how to use **Data import** for downloading/uploading data. **Data import** has four levels:

- Definitions
- Documents
- Logs
- Log details

Importing a definition

1. On **Definitions** level, click **Import definition**.

   The upload file dialog box appears.

2. Click **Open** and select an Enterprise Talk zip file.

   The zip is unzipped, the export.info is read and the XML files listed in export.info are read (see Exporting a definition).

3. When the Enterprise Talk definition is overwritten (not added) a confirmation dialog box appears: *Talk definition will be overwritten, continue?*

4. If you click **Yes**: the Enterprise Talk definition is imported.

   The Importing pop-up appears, displaying a progress bar. When the import(s) is/are successful, a Successful pop-up appears. When the import encountered errors, an Errors pop-up is displayed.

Uploading a data sheet

Once your are done completing the data in the Excel file, you can proceed to upload it.

1. Go to **Documents** level.
2. In the **Secure document file** field, choose **Upload**.
3. Browse to and select the data sheet that you want to upload.

   The data sheet is uploaded.

Amount fields in Excel

Running an definition

Click **Run** to run the definition manually. The process will be initiated as a background action. The progress of the definition process can been seen in the **Definitions** level (column Progress indication) and in the **Background actions** TSI. For more information about background actions, see Supporting data.

After running the definition, the data in the data sheet is imported into Planon. Subsequently, logging will be generated for the imported data.

Viewing logs

After importing your data from the data sheet, errors and warnings encountered during import are displayed on the **Logs** level. You can view the log (details) in order to fix issues.

There are various ways of accessing logs.

Download logs

To view multiple logs in a single PDF you can download them using the **Download logs** action. For more information, see Download logs.

Navigation selection

1. On **Definitions** level, select your definition and go to **Logs** level.

   The Logs level displays the results of a running the definition.

2. Select one or more items from the list, and go to **Log details** level to view the details of the issues encountered.

   Here, you can view all errors and warnings for the selected run. For more information about the fields on these levels, see Log / Log details fields.

Download logs

In addition to viewing the logs in the application, you can also download the logs as a formatted PDF.

1. Go to the appropriate level (see earlier) and select the log(s) that you want to view.

If you select multiple logs, these will be combined in a single PDF.

2. Click **Download logs**. Your PDF will be downloaded and you can view it in your browser or by using a PDF viewer.

Deleting logs

If you no longer require the available logs or log details, you can delete them.

1. On the **Logs** (or **Log details**) level, select the logs (details) that you want to delete and click **Delete** on the action panel.

If you delete the logs, the log details will also be deleted.

The selected logs/log details are deleted.

Specifics

This section describes some specific situations that you will need to take into account.

Address type

Address type is a field that has a specific input requirement.

It is possible to define up to 10 address types. Each address type corresponds with a character: CILOUPQRST. The value in the database is a string containing the characters for the selected address types and a space for the non-selected address types.

Example

For an address with address type 2, 5 and 9, the value is:

<space>I<space><space>U<space><space><space>S<space>

1	2	3	4	5	6	7	8	9	10
C	I	L	O	U	P	Q	R	S	T
<space>	I	<space>	<space>	U	<space>	<space>	<space>	S	<space>

Amount fields in Excel

When you are using Excel as a tool for capturing data (import/export), note that Excel stores amount values differently than may be expected.

Values in Excel sheets are internally stored as XML (right-click any Excel > 7-Zip > open archive ...).

In the XML, values may be stored using a much finer degree of precision that what is displayed

Example 305.65 might stored as 305.64999999998.

Planon cannot alter these values coming from the XML.

Using Excel in Planon may result in a differences between Excel and Planon.

Workaround

- Change the format of all numeric cells in Excel to text.

  Or, if this does not work...

- Prefix all numbers in all cells with apostrophe. An apostrophe before a cell value forces Excel to interpret the value as text. This is mostly useful for values that look like a number or date.
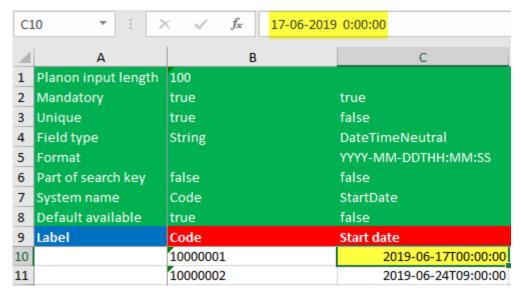
Template

Data sheet

Uploading a data sheet

Date-Time neutral fields

The template header indicates all kinds of information: whether a field is mandatory, what the field length is, and so on. Importantly, when there is a format requirement, the exact format is also listed in the header.

For **DateTimeNeutral** fields, note that the format that you see in Excel may differ from what is actually the cell value as shown in the following example:

C10	▼ ⋮	× ✓ ƒx	17-06-2019 0:00:00
	A	B	C
1	Planon input length	100	
2	Mandatory	true	true
3	Unique	true	false
4	Field type	String	DateTimeNeutral
5	Format		YYYY-MM-DDTHH:MM:SS
6	Part of search key	false	false
7	System name	Code	StartDate
8	Default available	true	false
9	Label	Code	Start date
10		10000001	2019-06-17T00:00:00
11		10000002	2019-06-24T09:00:00

Here, when you click the cell, its value is displayed in the formula bar on top (highlighted).

Make sure the value in the cell complies with the DateTimeNeutral format: YYYY-MM-DDTHH:MM:SS. You can type or copy the value in the formula bar. If the cell value does not comply, the import will fail.

Importing a hierarchical structure

When importing a hierarchical structure, a reference to the parent level is required.

Typically, when importing a hierarchical structure, you need to first import the parent and then import the sub (because the sub references the parent). Importing the sub first will result in an error.

If you need to first import the sub, you can do so by filling in NULL for the parent reference.

Planon input length	20	255		255
Mandatory	true	false		false
Unique	false	false		false
Field type	String	String		TechnicalClassification
Format				
Part of search key	false	false		false
System name	Code	Name		ParentRef
Default available	true	false		false
Label	**Code**	**Description**		**Parent level**
	01	Mechanical building services		NULL
	01	Mechanical building services		01
	02	Electrical building services		01

Person type

Person Type being a special field, is stored in the database as string of numbers 0,1,2,3,4,5,6,7,8,9 where each digit matches a particular type.

The value in the database is a string containing the number for selected person types and a space for the non-selected person types.

Example

For a person with person type 2, 5 and 9 the value will be:

<space><space>2<space><space>5<space><space><space>9

0	1	2	3	4	5	6	7	8	9
<space>	<space>	2	<space>	<space>	5	<space>	<space>	<space>	9

Field descriptions

The following sections list a description of fields available in **Data onboarding**.

Definition fields

Field	Description
Code	Displays the code of the generated definition.
Name	Displays the name of the generated definition.
Insertion date-time	The date and time of generating the definition.
Modification date-time	The date and time of the last modification.
User code	Displays the user who created the definition.
Modified by	Displays the user who modified the definition.

Log / Log details fields

Field	Description
Application log type	Displays the type of log, which is either: • Error • Warning • Information
Source	Displays information that identifies the import/export.
Log message	Displays information that will help you understand what went wrong during the import/export.

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