

Manual Physical Inventory Upload
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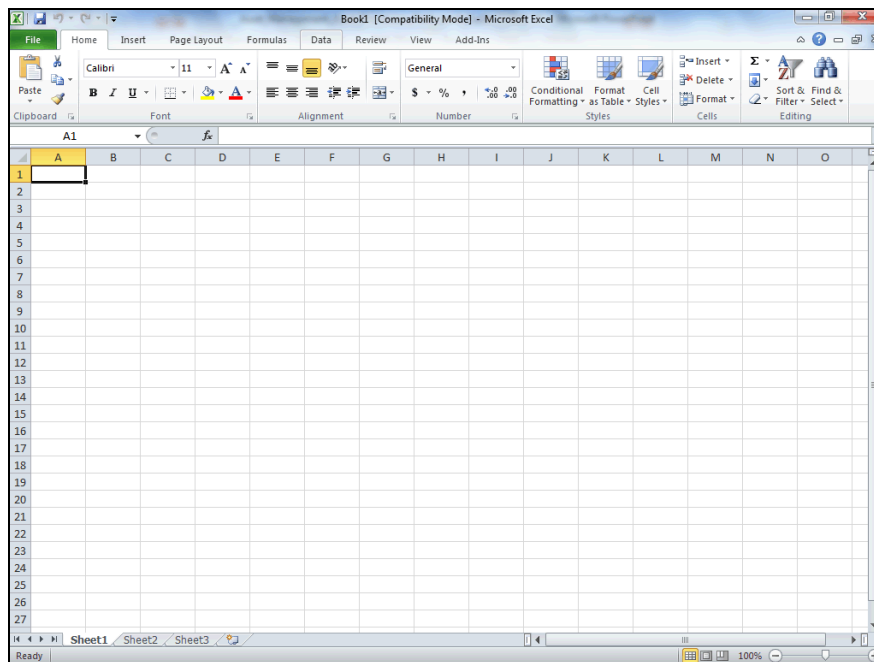
Manual Physical Inventory Upload

Procedure

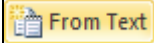
After completing this topic, you will be able to manually upload physical inventory.

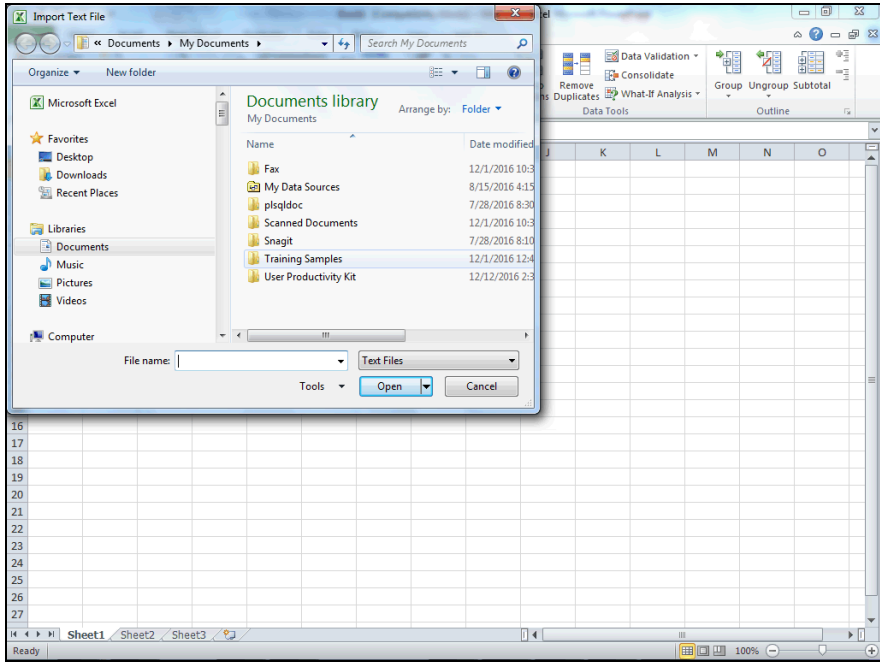
Navigation: Microsoft Excel > New Workbook


Step	Action
1.	<p>Part 1: Import a List of Tag Numbers from the Extract File</p> <p>Use Core-CT to generate the extract file. In this example, the extract file has already been generated and save to the desktop.</p> <p>As the physical inventory is performed, any missing rows can be added and extra rows deleted to accurately reflect the status of assets.</p>

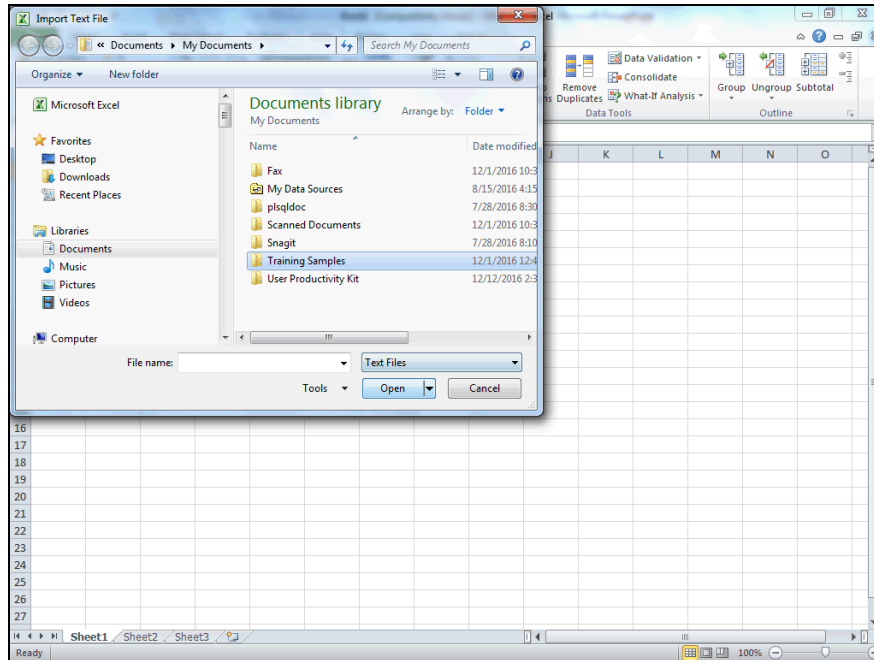


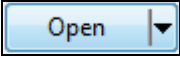
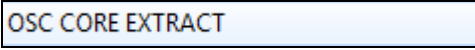


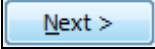
Step	Action
2.	<p>Click the Data tab.</p> <p><input type="button" value="Data"/></p>


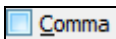
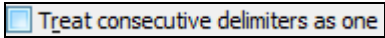
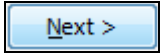
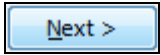

Step	Action
3.	Click the From Text button. 

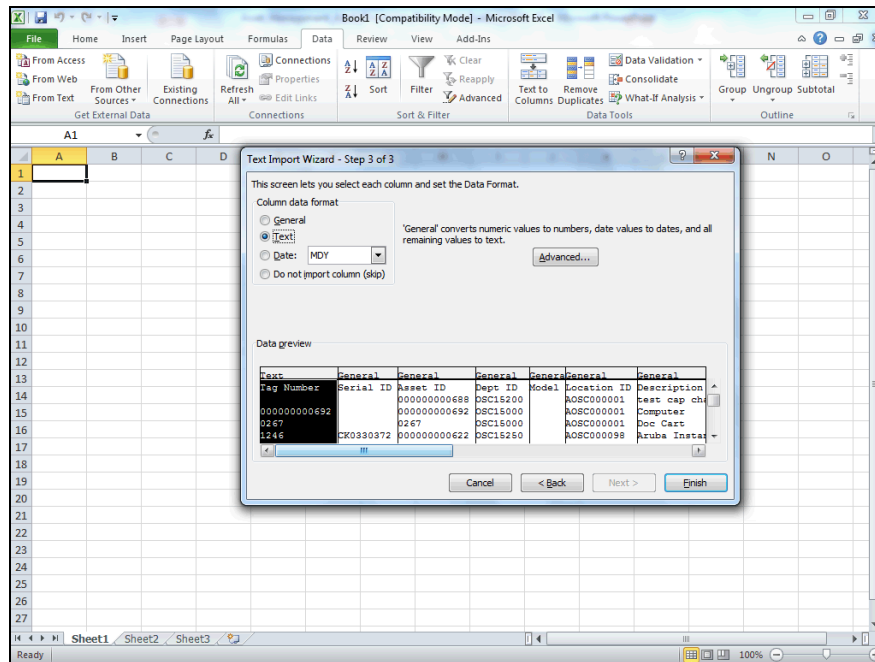


Step	Action
4.	Click the Training Samples folder. 

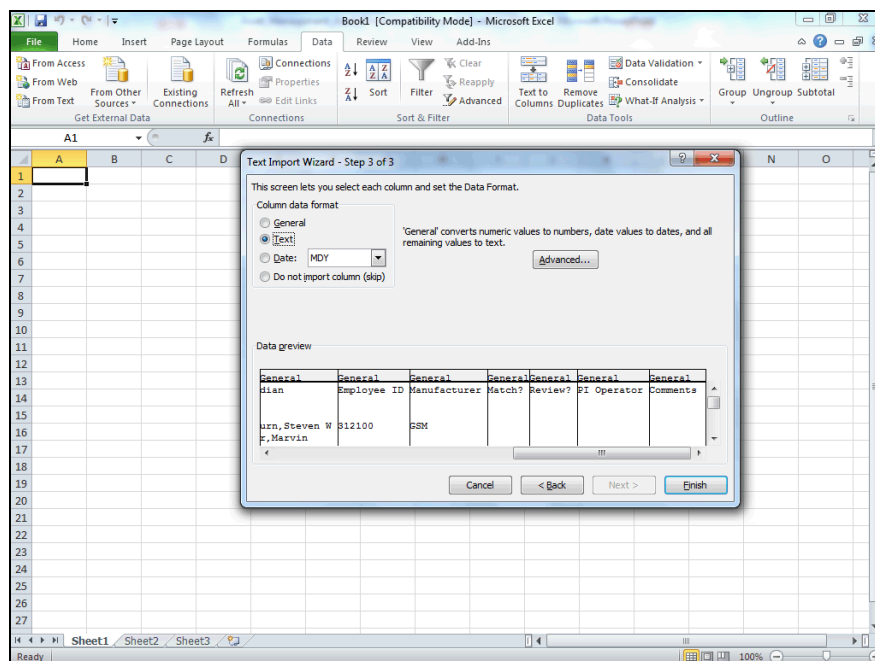



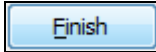
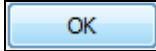

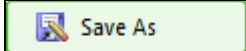
Step	Action
5.	Click the Open button. 
6.	Click the OSC CORE EXTRACT file. Click in the Name field. 
7.	Click the Import button. 
8.	The Text Import Wizard – Step 1 of 3 window displays. Keep the default values (as shown above). Ensure the Original Data Type field is set to Delimited. Click the Delimited option. 
9.	Click the Next > button. 

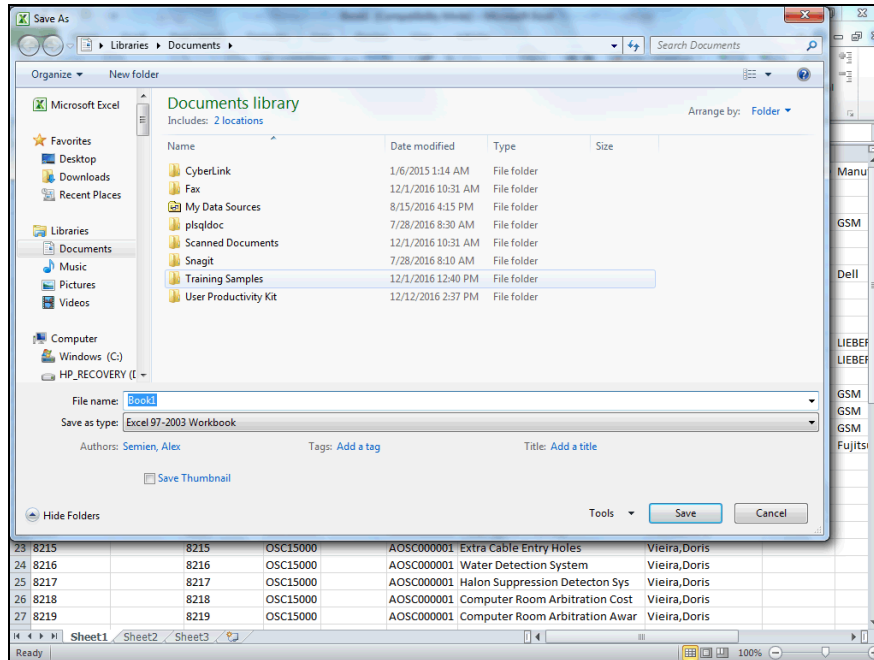
Step	Action
10.	<p>The Text Import Wizard – Step 2 of 3 window displays.</p> <p>All checkboxes should be unchecked except the Comma box.</p> <p>Click the Tab option.</p> 
11.	<p>Click the Comma option.</p> 
12.	<p>Set the Text Qualifier to the double quote character (“”).</p> <p>Click the Treat consecutive delimiters as one option.</p> 
13.	<p>Click the Next > button.</p> 
14.	<p>Click the Next > button.</p> 
15.	<p>The Text Import Wizard – Step 3 of 3 window displays.</p> <p>The first column in the Data Preview box will be highlighted. Change the Column data format to Text for the first column.</p> <p>Click the Text option.</p> 



Step	Action
16.	Select all of the remaining columns in the preview box. To do this, use the Horizontal Scrollbar to the far right side. Click the Horizontal Scrollbar .

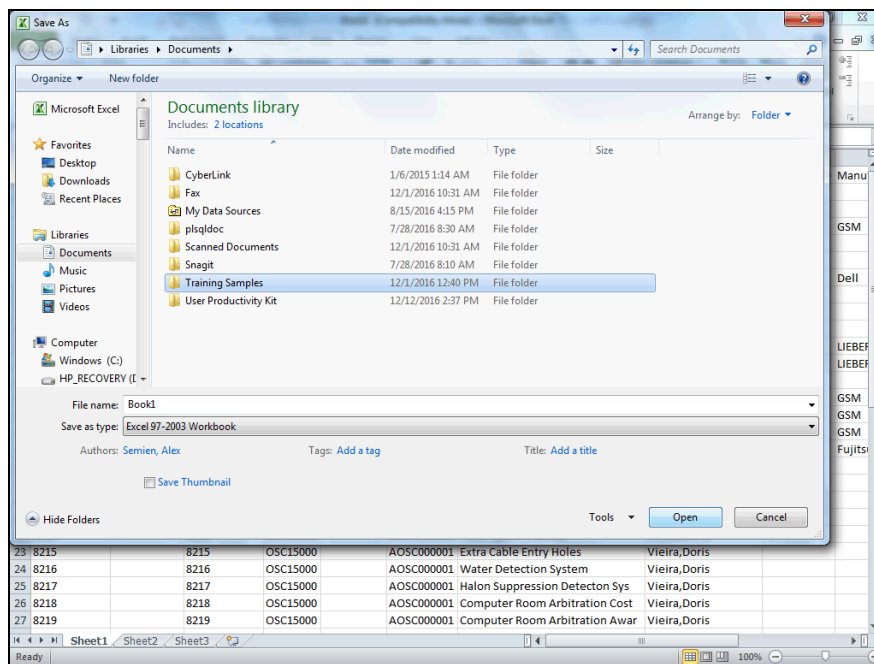


Step	Action
17.	<p>Hold down the Shift key, click the last column on the right, and release the Shift key.</p> <p>Press the [Shift] key and click the graphic.</p>
18.	<p>Click the Text option.</p> 
19.	<p>Click the Finish button.</p> 
20.	<p>Click the OK button.</p> 
21.	<p>Delete unneeded rows. The Extract may include a greater scope of assets than is expected to be inventoried. You should review the imported tag numbers to ensure that the user expectations and the extract are in agreement.</p> <p>To delete a row, right click the number in the far left column next to the row to be deleted. The row is highlighted and a drop down box appears. Select the Delete command from the drop down menu.</p>
22.	<p>Part 2: Enter New Manual Data Entries</p> <p>Enter data into the Template as you would for any MS Excel spreadsheet.</p>
23.	<p>To add a new entry, enter data in the following columns as described:</p>
24.	<p>You can continue to enter and maintain the information as needed throughout the Physical Inventory process to get the data ready for processing in Core-CT. Please be sure to save your work frequently and make backups.</p> <p>Always be sure to make a backup copy of your data. The spreadsheet contains the data that will be loaded into Core-CT and represents your current asset physical inventory. Follow your agency's procedures for maintaining backup copies of agency production information.</p>
25.	<p>Part 3: Exporting the Information as a Scan Data File in the Core-CT Accepted Format.</p> <p>This section provides a set of instructions on how to save the Template in the comma separated file format (.CSV) accepted by Core-CT AM Physical Inventory.</p>
26.	<p>Click the File Tab button.</p> 
27.	<p>Click the Save As menu.</p> 

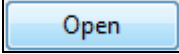

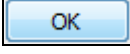
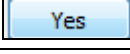


Step	Action
28.	Click the Training Samples folder.

Training Samples





Step	Action
29.	Click the Open button. 
30.	Enter " MANUAL PHYSICAL UPLOAD " in the File name: field.
31.	Click the Save as type: list.
32.	Click the CSV (Comma delimited) list item.
33.	Click the Save button. 
34.	Click the OK button. 
35.	Click the Yes button. 
36.	You have successfully saved a .CSV format scan data file. Follow the process for uploading the scan data file to Core-CT in order to continue with the AM Physical Inventory process. End of Procedure.