

FIMS Upload Guide

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This guide provides a quick overview of the FIMS upload process. More detailed assistance can be found in the *FIMS User Guide, Upload Processing* chapter.

The FIMS upload process requires the creation of an Excel upload template file. The upload template file is generated using the FIMS application and populated with data from your local data source. The populated upload template file is then uploaded into the FIMS database. The following topics outline the steps for this process.

Upload Template File Creation - This step will create an Excel spreadsheet with column headings for the specific data fields (i.e. Gross SQFT, Estimated Disposition Year, Mission Dependency, Deferred Maintenance ...) that are to be uploaded into FIMS. A sample upload template file, [maintUpload_template.xls](#), is available on the FIMSWeb page at <https://fimsweb.doe.gov/fimsinfo/downloads.htm> under the *FIMS Upload Process* heading. This template would be used to update Annual Actual Maintenance, Deferred Maintenance and Inspection Date for building, trailers and OSFs.

Use the following steps to create the upload template file:

- 1) While logged on to FIMS click Property, then Upload. Choose a template from the **Select Template** picklist. Reference the *FIMS User's Guide, Upload Processing* chapter for more details on the different templates available.
- 2) The list of 'Available Columns' displays the specific FIMS data fields related to the template that is chosen. Move the data fields to be uploaded from the 'Available Columns' list to the 'Selected Columns' list.
- 3) After selecting all the data fields to be uploaded in your upload file, click . At the prompt Save the Excel template file.

The template will contain key identifying data fields that you did not select as you generated the template. These key identifying data fields, such as Site Number, Area Number and Property ID, allow the upload process to uniquely identify the record in FIMS that you intend to modify.

NOTE: Do not change the column headings generated in the Excel template file. Any changes to the column headings will cause the upload process to fail.

Populate the Upload Template File - Data from your local data source should be used to populate the upload template file. Your data should be copied into the upload template file. All data should be properly formatted before copying into the upload template file. A sample file, [maintUpload_fy11.xls](#), is available on the FIMSWeb page at <https://fimsweb.doe.gov/fimsinfo/downloads.htm> under the *FIMS Upload Process* heading. This upload template file would update Annual Actual Maintenance, Deferred Maintenance and Inspection Date for building, trailers and OSFs.

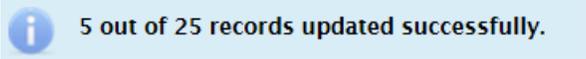
Use the following guidelines to assist with formatting the data to be uploaded in your upload template file:

- Date fields should be formatted as MM/DD/YYYY.
- To remove a value from a data field, place blanks in that cell in your Excel upload template. Do not leave cells blank if you don't intend to remove the data from the FIMS database.
- Numeric data fields should be formatted without dollar signs or commas. Decimal points may be used for numeric values defined as decimals.

- The upload process will recognize upper- and lower- case letters. All desired capitalization should be applied to the data in your upload template file.
- Picklist, radio buttons and check boxes used within FIMS usually store codes in the database. Reference the *FIMS User's Guide, Appendix A – Data Element Dictionary* for a specific data field, *Appendix B – Building Usage Codes, Appendix C – OSF Usage Codes, or Appendix E – Lookup Table Descriptions* for valid codes. These database values are case sensitive.

The Upload process should not be used to remove a value from a picklist, radio button or check box data field because the database validation rules will prohibit a blank value.

Upload the Upload Template file to FIMS - While logged into FIMS, use the following steps to complete the upload process:

- 1) Click Property, Upload to open the Upload window.
- 2) Under the **Upload File** section of this window, click  to locate and Open the upload template file that you created. The file name will be displayed on the window.
- 3) Click the  button to initiate the process. The upload process runs immediately upon clicking the Upload button.
- 4) Upon completion of the upload, a message will be displayed with the number of records updated successfully as shown here. 
- 5) If there were update errors, the View Status Log link becomes available. Click the View Status Log link to see the **Upload Status Log**. The Upload Status Log will identify how many records processed successfully and also provide detailed error messages and the rows in the Excel upload template file of any records that did not upload. To print the Update Status Log, click  .
- 1) If visible, click the  button to open an Excel file with the rejected (not uploaded) records. Data values in error are highlighted by marking them in **red** text.

If you Browse and retrieve a file for uploading and decide you want to remove it and not upload the data, click the  button.

After uploading data, it is important that you review and verify your data to ensure that the values were uploaded correctly.

Caveats:

- 1) Site and Area records cannot be created through the upload process.
- 2) New building, land, OSF, and trailers records cannot be created through the upload process.
- 3) Property ID, Property Type, Ownership, and HQ Program cannot be modified through the upload process.
- 4) When uploading Gross Sqft you need to ensure that the total of the Goal Subject Facilities, Excluded Facilities, and Non-Energy Consuming Facilities sqft equals the Gross Sqft value.