



IMPORTER APPLICATION

USER GUIDE

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Overview

Importer application is used to upload data in bulk to Advance Applications. Standard templates per Advance Application have been created to address commonly used data sets.

The process to complete data imports includes:

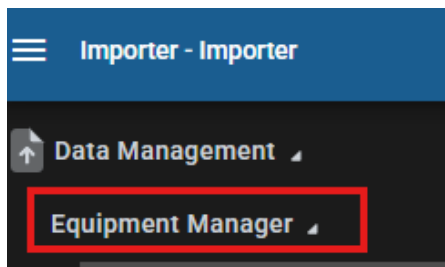
- Select template and download
- Enter data into the template
- Upload the populated template
- Correct any Importer-level data validation errors
- Process records
- Correct any Application-level data validation errors
- Data uploaded to Application

Upload Instructions

See [Template Definitions](#) section in guide for a brief description of each template per Advance Application.

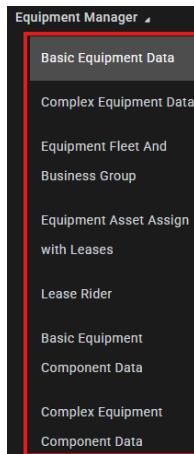
Template Selection and Population

1. On Left Side Bar, expand **Data Management**
2. Expand desired **Advance Application** to display available templates



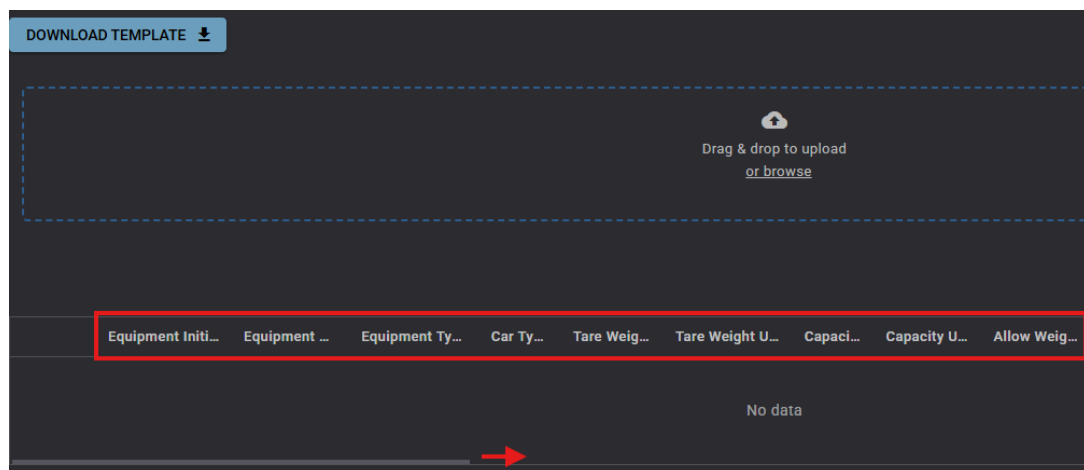
3. Select desired Template.

Note: Basic and Complex templates have a select group of common fields, complex expands on basic by offering additional fields.



4. With template selected:

- a. **Importer** will display the **Template Fields** allowing User to determine if desired add/update field(s) are included in template. To view all fields, user can slide the bottom bar to right and additional fields will be displayed.



- b. Selecting the **Information**  icon on upper right side (Figure 1) will open a **Validation Criteria** window (Figure 2) noting specific template required fields, field limitations, etc.

Figure 1

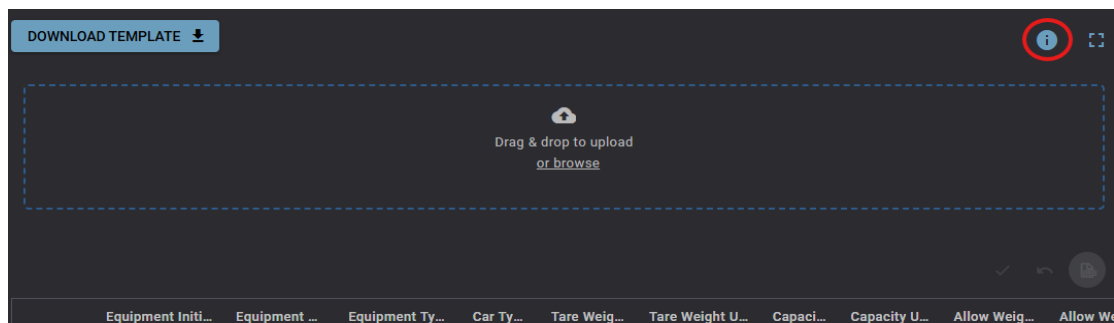
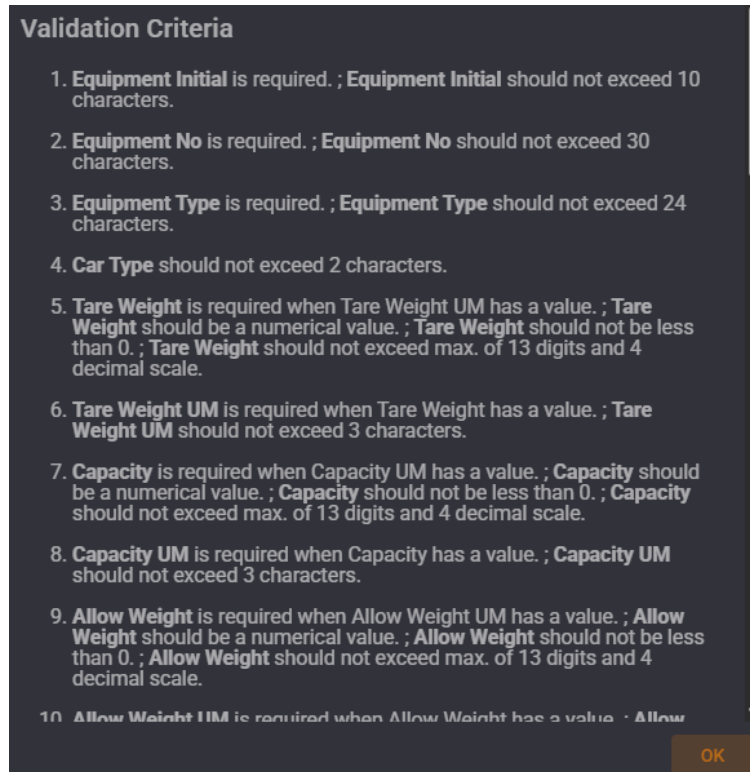
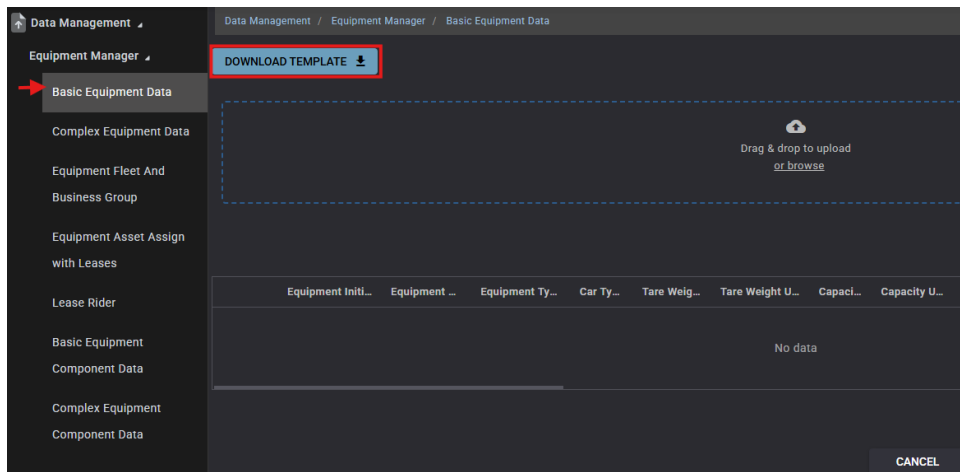


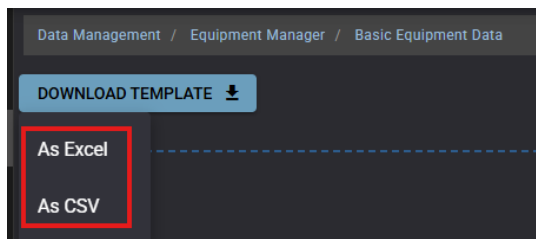
Figure 2



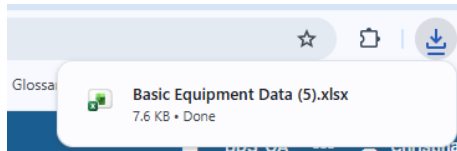
5. With template highlighted, select **Download Template**



6. Choose Template **File Format**



7. **Open Downloaded Template**



8. Populate **Template Fields** with car(s) information then **Save Template File** to desktop/computer

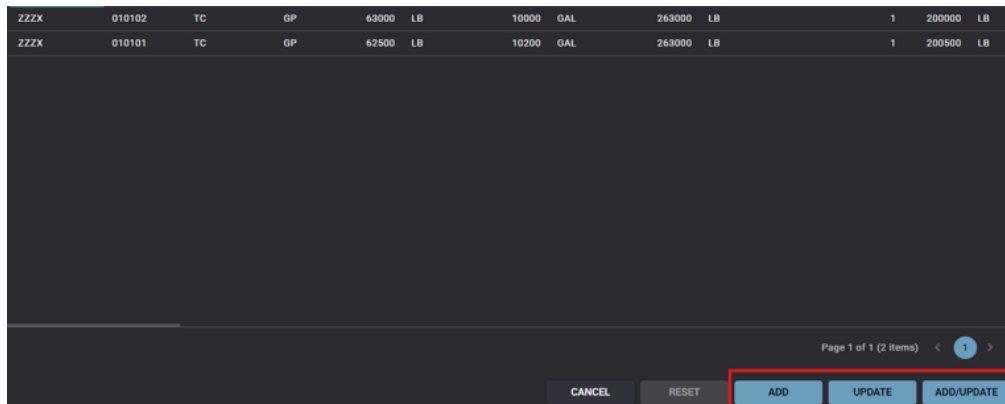
Note: Do NOT modify column names or order

A	B	C	D	E	F	G	H	I	J	K	L	M
Equipment Initial	Equipment No	Equipment Type	Car Type	Tare Weight	Tare Weight UM	Capacity	Capacity UM	Allow Weight	Allow Weight UM	Num Compartments	Load Limit	Load Limit
ZZZX	010102	TC	GP	63000 LB		10000 GAL		263000 LB		1	200000	LB
ZZZX	010101	TC	GP	62500 LB		10200 GAL		263000 LB		1	200500	LB

9. **Drag/Drop** file into upload area or **Browse** computer to choose file. Upon drag/drop or selection, the spreadsheet data will process through two [Validation Errors – Importer Level](#) checks.

- 1st Validation** - system will look for any unaccepted values.
 - See [Spreadsheet Validation – Unaccepted Values](#) for instructions on how to resolve.
- 2nd Validation** - Once criteria values are validated, grid will populate. If there are any Field Errors/Missing Data e.g. using LB vs LBS, cells will be highlighted in red.
 - See [Spreadsheet Validation - Field Errors or Missing Data](#) for instructions on how to resolve.

10. Once Spreadsheet Validation errors have been corrected - **Add, Update** and **Add/Update** buttons will be active.



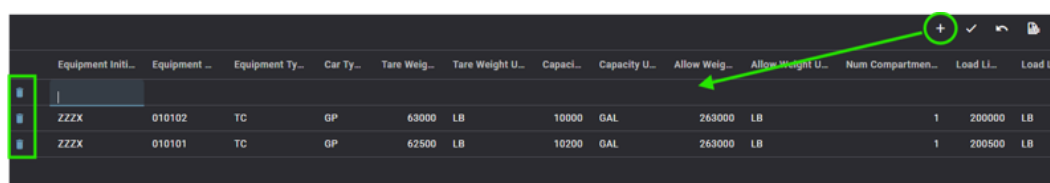
11. Users have **Additional Options** available before uploading data to Advance Application:

a. Add New Record(s)

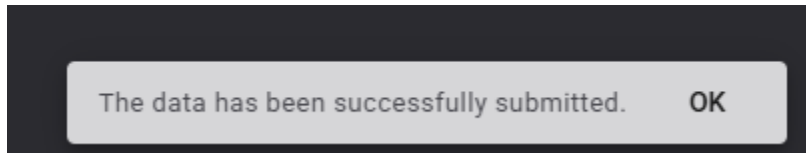
- Users can select **Add (+)**, to insert additional line to add more cars to grid

b. Delete Record

- Users can select the **Trashcan** icon on left side of row to delete row.



- c. If one of the additional options is applied, User will need to select the **Checkmark** ✓ icon to refresh grid to re-trigger the two step validation process of the new information and re-activate the Add, Update and Add/Update buttons.
12. **Upload Data to Advance Application** by selecting one of the following:
- a. **Add** – if adding new data. Validations are specific to ensure users have included all required application data. This is the fastest processing option for loading new data.
 - b. **Update** – if updating or correcting existing data. Validations are specific to ensure the items listed for update already exist.
- Important:** *Importer Date Fields are added as a new entry. If corrections for dates are needed, users must correct dates directly in associated Advance Application.*
- c. **Add/Update** – if adding new and updating at same time. This option uses additional processes to determine which validations to run based on if the data is new or existing which causes slower overall processing. It is recommended to utilize Add or Update options as applicable vs Add/Update due to response time for large sets of mass data loads.
13. Selecting add/update triggers system to review for violation(s) at the [Advance Application Level](#).
- a. **Validation** – system will look for data field violations that do not meet Advance Application criteria. A Violation Log will appear identifying why field(s) does not meet criteria.
 - i. See [Application Validation – Error Log](#) on how to resolve.
14. Once Application violations are corrected, proceed with selecting **Add, Update or Add/Update**.
15. A **Confirmation System Window** will appear. Refresh Advance Application grid to see changes made.



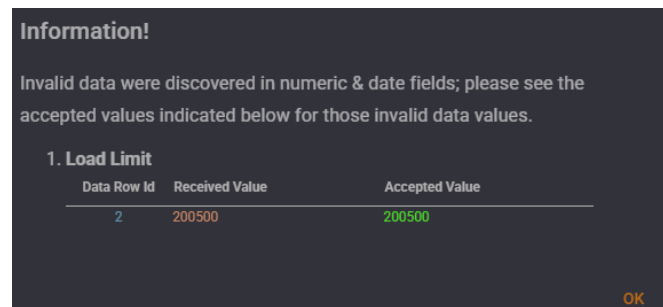
Validation Errors

There are two validation processes - One at Importer level and one at Application level.

Importer Level

Spreadsheet Validation – Unaccepted Values

Upon drag/drop or uploading spreadsheet, system will review the data. An information box will appear for any data not meeting Criteria requirements. This will identify the row and value that could not be accepted along with the value the system has used. Select **OK** to apply



Spreadsheet Validation – Field Errors or Missing Data

- **1** A Validation Error notification will appear in top right corner
- **2** Red Fields identify fields with errors; there are multiple options to view error descriptions:
 - Red Field - Hovering over to display error
 - Red Field - Double click to display error
 - **3** Validation Error Log - will populate with error descriptions. Select the down arrow (right side) to expand the log. When error message is selected, it will navigate user directly to the field.

Note: Selecting the toggle button on the top right will filter the grid to only show records with errors. This is helpful when mass loading and experiencing multiple lines with errors to narrow down grid to those lines only for correcting.

There are 2 validation error(s) found. Please try to resolve them.

Toggle to only show records with errors on grid

Equipment Initi...	Equipment ...	Equipment Ty...	Car Ty...	Tare Weig...	Tare Weight U...	Capaci...	Capacity U...	Allow Weig...	Allow Weight U...	Num Compartmenten...	Load Li...	Load L...
ZZZX	010102	TC	GP	63000	LB	10000	GAL	263000	LB	1	200000	LB
ZZZX	010101		GP	62500	LB	10200	GAL	263000	LB	1	200500	LB

Equipment Type is required.

Validation Error Log

2:3 - Equipment Type is required.

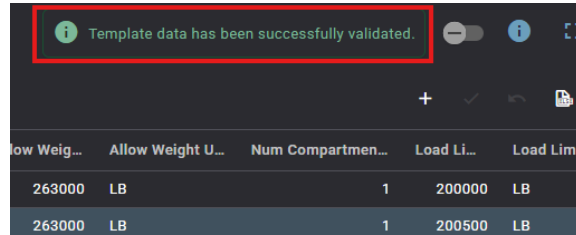
2:19 - Load Limit UM is required when Load Limit has a value.

Error Correction at Importer Level

- Double click in field then enter data
- Field will turn green if data passes Importer Validation
- Select the **Checkmark** ✓ icon to save

Equipment Ty...	Car Ty...	Tare Weig...	Tare Weight U...	Capaci...	Capacity U...	Allow Weig...	Allow Weight U...	Num Compartmenten...	Load Li...	Load L...
TC	GP	63000	LB	10000	GAL	263000	LB	1	200000	LB
TC	GP	62500	LB	10200	GAL	263000	LB	1	200500	LB

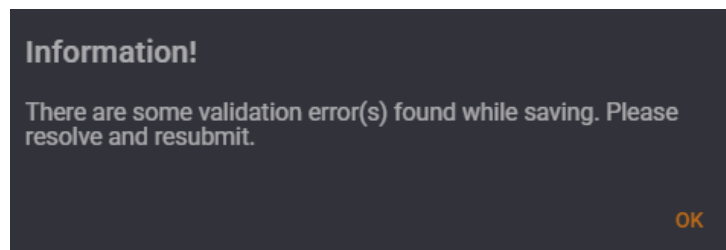
- The validation process will run again, if it passes the message will change to green and state successful validation.



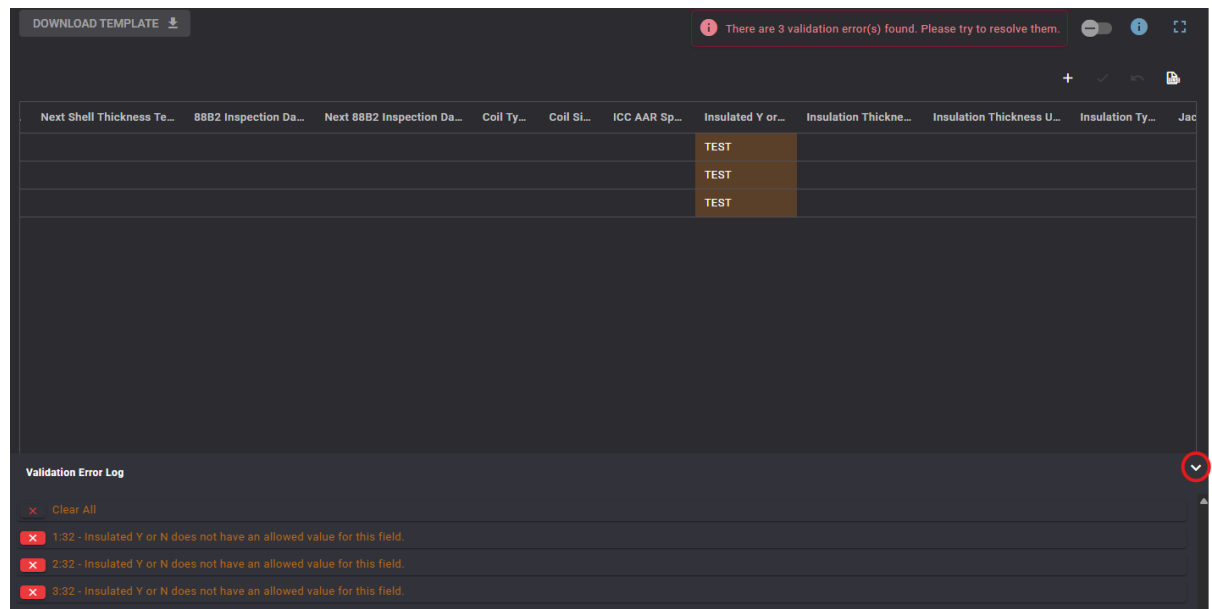
Advance Application Level

Application Validation – Error Log

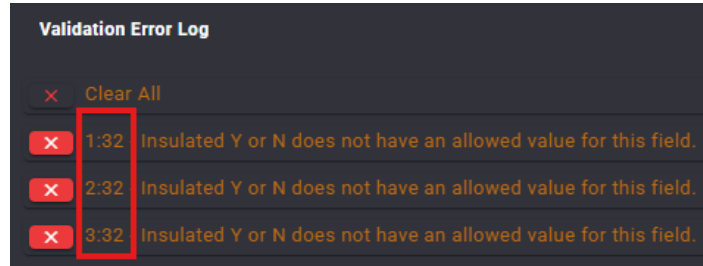
- Upon hitting Add/Update/Add-Update, system will review the data. An information box will appear for any data not meeting Application requirements.



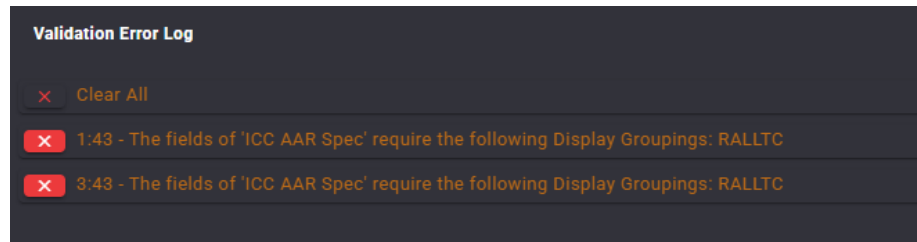
- View the Validation Error Log by clicking down arrow on right side to determine what field(s) needs addressing.



- Each Validation Error row will identify the Row # and Field # that needs correcting. For this example, Rows 1, 2, 3, all have the same validation error in Field #32.



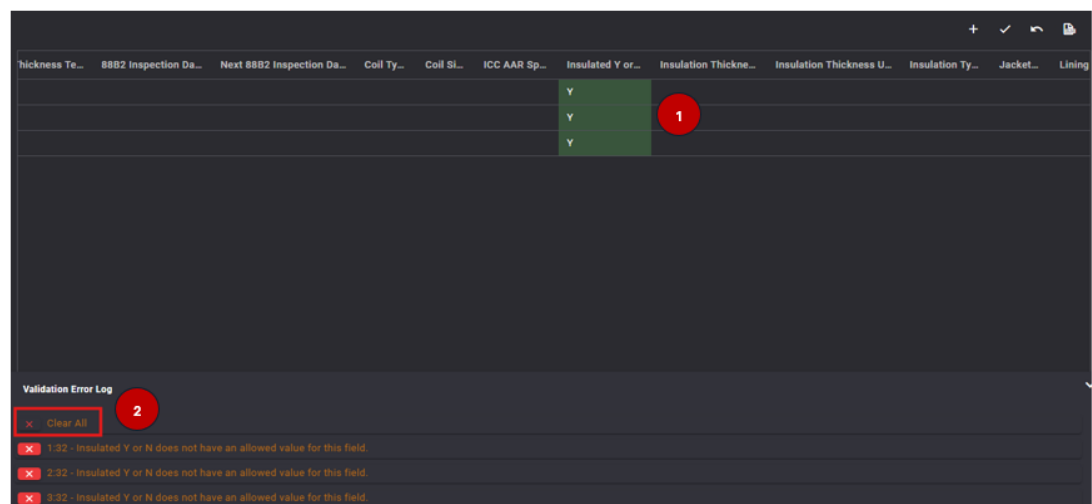
- If Equipment needs Specific Display Groups or Equipment Component Category – Validation Error Log will advise which is needed. See [below](#) instructions for how to correct.



Error Correction at Application Level

- **Double click** in **field** then correct/enter data (Figure 3)
- Field will turn green (Figure 3)
- **Validation Error Log** – select **Clear All** to clear error log (Figure 3)
- Add/Update/Add-Update buttons will activate, **select option** to proceed with processing data (Figure 4)

(Figure 3)



(Figure 4)

DOWNLOAD TEMPLATE

Template data has been successfully validated.

Thickness Te...	8882 Inspection Da...	Next 8882 Inspection Da...	Coil Ty...	Coil SI...	ICC AAR Sp...	Insulated Y or...	Insulation Thickne...	Insulation Thickness U...	Insulation Ty...	Jacket...	Lining
						Y					
						Y					
						Y					

Page 1 of 1 (3 items)

CANCEL RESET ADD UPDATE ADD/UPDATE

- To Update Display Groups or Equipment Component Category:
 - Go to *Equipment Manager*, **Add Groupings** and/or **Categories** that are needed based on Error Log comment. **Save Equipment** after adding Groupings/Categories.

Equipment Grid Mechanical Profile Equipment Components Comments Reporting Categories Fleet Assignment Asset A

Internal Width Internal Width ... External Max Width External Width ...

Internal Height Internal Height ... External Max Height External Height...

Manufacturer Manufacture ...

Equipment Component Categories
RALLRF, RALLTF

Mechanical Fields
Display Grouping
RALL, RALLTC

- Return to *Importer* in the **Validation Error Log** - select **Clear All**

Validation Error Log

Clear All

1:43 - The fields of 'ICC AAR Spec' require the following Display Groupings: RALLTC

3:43 - The fields of 'ICC AAR Spec' require the following Display Groupings: RALLTC

- Add/Update/Add-Update buttons will activate, **select option** to proceed with processing data.

Template Definitions

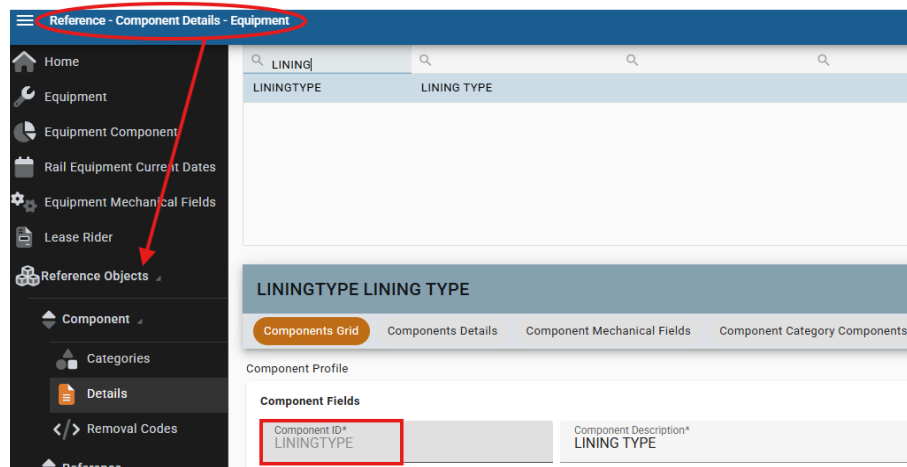
Equipment Manager

Templates in this section are used to upload mass data to existing equipment.

Basic Equipment Data	Add or update Standard Equipment Mech Fields – Small list of fields that are commonly populated
Complex Equipment Data	Add or update Standard Equipment Mech Fields and Standard Equipment Test Dates – Basic Template plus more standard equipment fields and standard equipment test dates
Equipment Fleet And Business Group	Add or update equipment Fleet and Business Group assignment (Fleet Assignment table).
Equipment Asset Assign with Leases	Add or update equipment Asset Assignment with <i>optional Lease or Sublease</i> section (Asset Assign and Lease-Sub-lease/Financial tables) <i>*This template can be used for Owned, Leased, or Subleased*</i>
Lease Rider	Add or update lessor lease Rider and Rental Rate Information (Lease Rider and Lease Rider Rental tables).
Basic Equipment Component Data	Add or update Equipment Component – allows user to modify <i>Equipment Component Grid</i> by adding/updating a component. <i>*Component/Part field - populate using component's Component ID Field Name <u>NOT</u> the Display/Component Description Field Name (Figure 5)</i>
Complex Equipment Component Data	Add or update Equipment Component and common Component Test Dates – Basic Template plus common component test dates <i>*Component/Part field - populate using component's Component ID Field Name <u>NOT</u> the Display/Component Description Field Name (Figure 5)</i>

(Figure 5)

Go to **Components Detail** module to find Component ID field information



RAILTRAC Advance

Templates for this section are coming soon!