



UNIFOCUS
WORKFORCE MANAGEMENT

Release Document

- 1. Core Data Upload**
- 2. Maintenance Grouping Functionality**

May 2024



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CORE DATA UPLOAD

INTRODUCTION

This release introduces the Core Data Upload module, designed to facilitate the import of bulk data for various modules including Department, Designations, Skills, Service Action Reasons, Job Manager, Glitch Action Reasons, and Glitch Manager.

The Core Data Upload module enables you to efficiently upload and manage bulk data, streamlining operations across multiple properties within the chain.

This document is intended for corporate users responsible for managing bulk data uploads within the Service application.

GETTING STARTED

Accessing the module

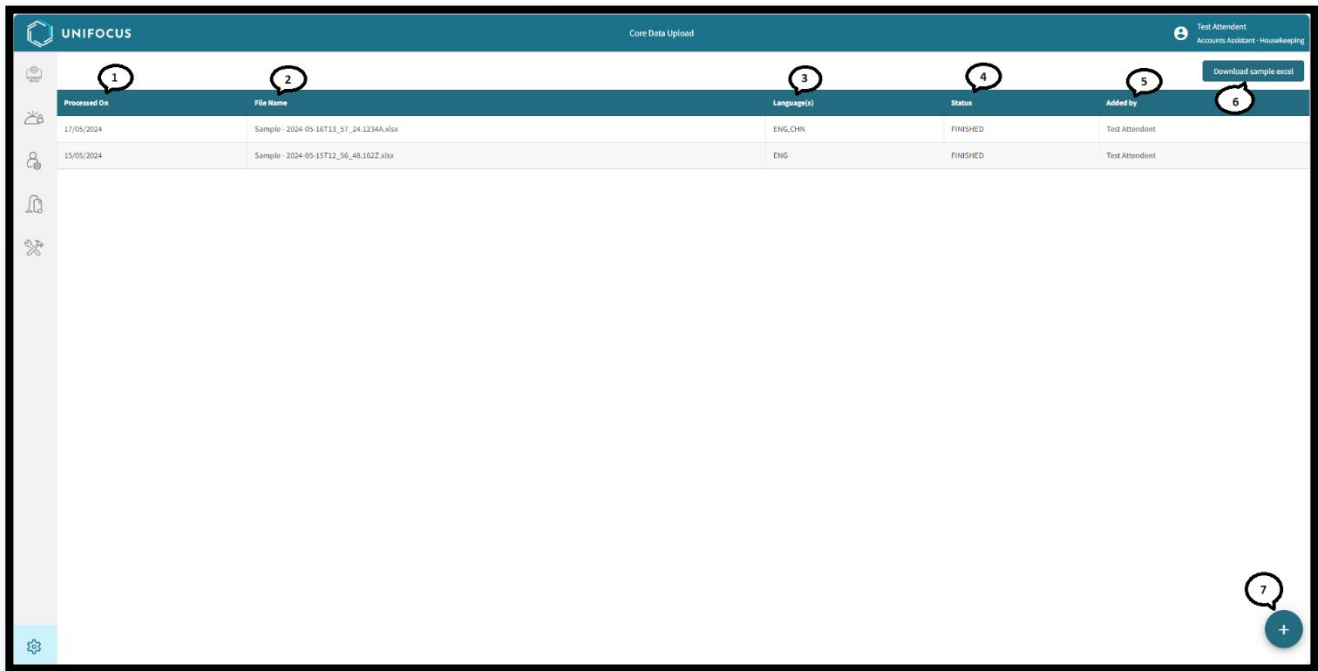
To access the Core Data Upload module, follow these steps:

1. Go to **System Configuration > Settings**.
2. Select **Core Data Upload**.

User roles and permissions

To access the Core Data Upload module, you must have corporate user rights.

MAIN SCREEN OVERVIEW



| Processed On | File Name | Language(s) | Status | Added by |
|--------------|---|-------------|----------|----------------|
| 17/05/2024 | Sample - 2024-05-16T11_57_24.1234A.xlsx | ENG,CHN | FINISHED | Test Attendant |
| 15/05/2024 | Sample - 2024-05-15T12_56_48.160Z.xlsx | ENG | FINISHED | Test Attendant |

Core Data Upload – Main Screen

- Processed On:** Indicates the date when the bulk action was performed.
- File Name:** Name of the Excel file uploaded to perform the bulk operation.
- Languages:** Indicates the languages selected for processing during the bulk operation.
- Status:** Provides the real-time status of the bulk operation.
- Added by:** Indicates the name of the user who performed the bulk operation.
- Download Sample Excel:** Click this button to download the sample file.
- Upload Operation Button:** Clicking this button opens the pop-up screen for Import Excel file.

Import Excel File

Step 1 - Select Excel File

Select excel file from your device. Please note that the format should be same as the format of the sample file.

Select File

Sample - 2024-05-15T12_56_48.102Z.xlsx
14 kB

Primary Language(Default): English. Secondary Language (Optional): Choose from Dropdown

Select Language

- Chinese/中文
- Spanish/español
- Turkish/Türkçe
- German/Deutsch
- Russian/Русский
- Thai/ไทย
- Korean/한국어

Generate Preview

Step 2 - Import Result

Step 3 - Import

Close

Import Excel File – Main Screen

Import Excel File

Step 1 - Select Excel File

Step 2 - Import Result

Validate Data

Submit

Departments Designations Skills GlitchClosingReasons GlitchReopenReasons GlitchDescriptions

| RowIndex | Department | Department_Lang1 |
|----------|-------------------------------|------------------------------|
| 1 | Auto Call - Please do not us* | Cantonese |
| 2 | Bains | Bains |
| 3 | Call Center | Call Center |
| 4 | CASINO - Acc. Client & Quali | CASINO - Acc. Client & Quali |

Step 3 - Import

Row Index:16, Tab: Departments, Column: Department, Error: Provided data already exists in the system
 Row Index:19, Tab: Departments, Column: Department, Error: Provided data already exists in the system
 Row Index:44, Tab: Skills, Column: Skill, Error: Character length exceeds the maximum limit.

Close

Import Excel File – Preview Screen



8. **Validate Data:** Click this button to validate the data available in the preview screen. The system will check each entry and provide errors accordingly.
9. **Submit Button:** Once all errors are resolved, click this button to start the import operation.
10. **Modules Segregation:** Tabs separate different modules. A red-colored tab indicates entries that require revision.
11. **Input Fields:** Prefilled based on the data provided in the Excel file.
12. **Error Box:** Displays all errors along with the exact location and error description.
13. **Close Button:** Click this button to stop the bulk operation at any time.
Note: Once you click Submit, the bulk operation cannot be stopped.

MAINTENANCE - GROUPING FUNCTIONALITY

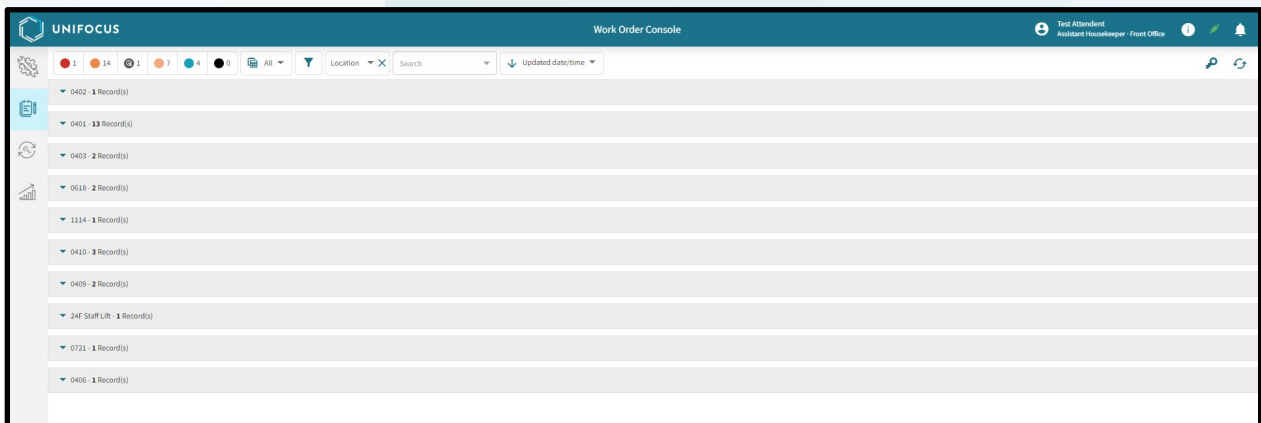
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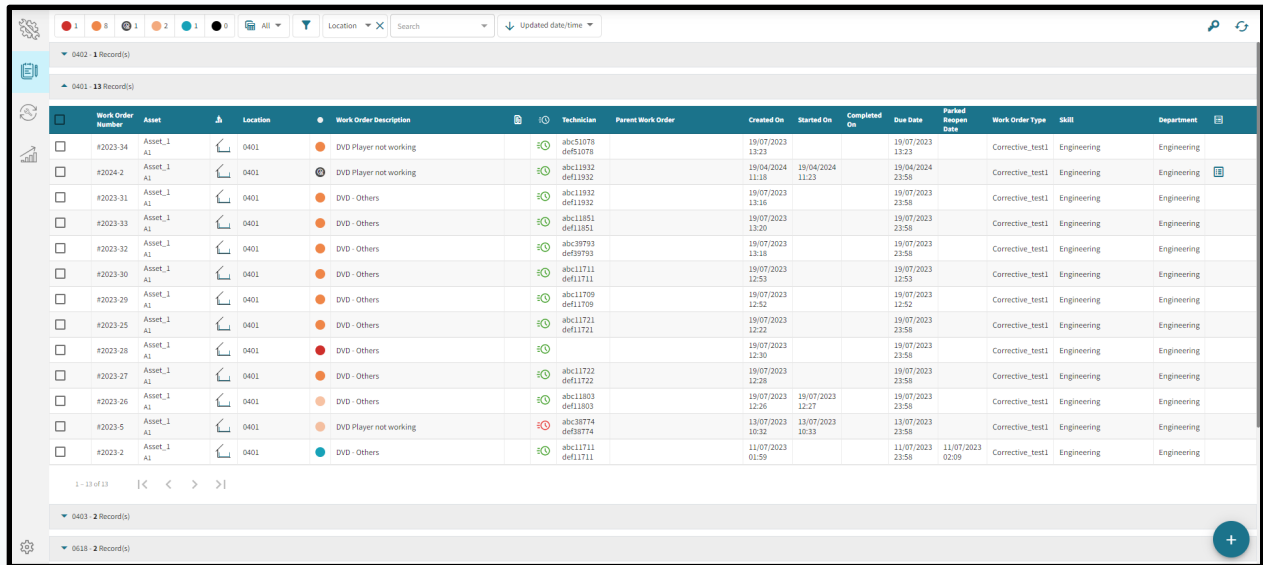
The grouping functionality allows you to quickly view all work orders associated with specific criteria, such as Location, Asset, Work Order Description, Priority, Technician, Department, Work Order Type, or Property.

When you select any of these options, the system will group the work orders accordingly. For example, if you choose Location, the system will group the work orders based on their locations. The system displays up to 25 work orders at a time, with the option to view additional pages using the next icon.

You can expand one group at a time. If you expand one location and then try to expand another, the system will close the first grouping and expand the second.

Note: When you expand a grouping, the system will also update the work order counts.





| Work Order Number | Asset | Location | Work Order Description | Technician | Parent Work Order | Created On | Started On | Completed On | Due Date | Picked/Response Date | Work Order Type | Skill | Department |
|-------------------|------------|----------|------------------------|-------------------|-------------------|------------------|------------------|--------------|------------------|----------------------|------------------|-------------|-------------|
| #2023-34 | Asset_1 A1 | 0401 | DVD Player not working | abc18078 def81078 | | 19/07/2023 12:23 | | | 19/07/2023 12:23 | | Corrective_test1 | Engineering | Engineering |
| #2024-2 | Asset_1 A1 | 0401 | DVD Player not working | abc1932 def12932 | | 19/04/2024 11:18 | 19/04/2024 11:23 | | 19/04/2024 23:58 | | Corrective_test1 | Engineering | Engineering |
| #2023-31 | Asset_1 A1 | 0401 | DVD - Others | abc1932 def12932 | | 19/07/2023 13:16 | | | 19/07/2023 23:58 | | Corrective_test1 | Engineering | Engineering |
| #2023-33 | Asset_1 A1 | 0401 | DVD - Others | abc11851 def11851 | | 19/07/2023 13:20 | | | 19/07/2023 23:58 | | Corrective_test1 | Engineering | Engineering |
| #2023-32 | Asset_1 A1 | 0401 | DVD - Others | abc39793 def9793 | | 19/07/2023 13:16 | | | 19/07/2023 23:58 | | Corrective_test1 | Engineering | Engineering |
| #2023-30 | Asset_1 A1 | 0401 | DVD - Others | abc11711 def11711 | | 19/07/2023 12:53 | | | 19/07/2023 12:53 | | Corrective_test1 | Engineering | Engineering |
| #2023-29 | Asset_1 A1 | 0401 | DVD - Others | abc11709 def11709 | | 19/07/2023 12:52 | | | 19/07/2023 12:52 | | Corrective_test1 | Engineering | Engineering |
| #2023-25 | Asset_1 A1 | 0401 | DVD - Others | abc11721 def11721 | | 19/07/2023 12:22 | | | 19/07/2023 23:58 | | Corrective_test1 | Engineering | Engineering |
| #2023-28 | Asset_1 A1 | 0401 | DVD - Others | | | 19/07/2023 12:30 | | | 19/07/2023 23:58 | | Corrective_test1 | Engineering | Engineering |
| #2023-27 | Asset_1 A1 | 0401 | DVD - Others | abc11722 def11722 | | 19/07/2023 12:26 | | | 19/07/2023 23:58 | | Corrective_test1 | Engineering | Engineering |
| #2023-26 | Asset_1 A1 | 0401 | DVD - Others | abc11803 def11803 | | 19/07/2023 12:26 | 19/07/2023 12:27 | | 19/07/2023 23:58 | | Corrective_test1 | Engineering | Engineering |
| #2023-5 | Asset_1 A1 | 0401 | DVD Player not working | abc38774 def38774 | | 13/07/2023 10:32 | 13/07/2023 10:33 | | 13/07/2023 23:58 | | Corrective_test1 | Engineering | Engineering |
| #2023-2 | Asset_1 A1 | 0401 | DVD - Others | abc11711 def11711 | | 11/07/2023 01:59 | | | 11/07/2023 23:58 | 11/07/2023 02:09 | Corrective_test1 | Engineering | Engineering |

In addition to grouping, you can apply filters, sort data, or use search functionality. The system will display results based on the applied criteria.

GETTING STARTED

Accessing the functionality

To access grouping functionality, follow these steps:

1. Go to **Maintenance > Work Order Console**.
2. Select the **Grouping** drop-down option next to the filter icon.

Grouping work orders

1. Select the **Grouping** drop-down menu.
2. Select Location, Asset, Work Order Description, Priority, Technician, Department, Work Order Type or Property.
The console updates to display the collapsed rows.

Removing groupings

To remove groupings, select (X) and the Work Order Console updates to display ungrouped jobs. By default, there is no grouping applied.

HELP US IMPROVE

We value your input and want to hear from you! As we continue to enhance Unifocus products, we invite you to share your questions, suggestions, and feedback with us. If you have any thoughts or ideas on how we can improve our products, please don't hesitate to reach out to us at product@unifocus.com or [Ideas Portal \(aha.io\)](https://aha.io).