

# EquipMapper

Equipment Mapper for use with BUILDER™

## User Guide

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# Welcome to EquipMapper

Version 4.01.06.2016, published January 6, 2016

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## ***What is EquipMapper?***

EquipMapper is a tool that assists customers who are transferring information from another asset management system into BUILDER™ instead of entering asset information directly into BUILDER from scratch. When you have existing information stored about assets that are contained in one or more buildings/facilities, EquipMapper can help you import this facility information into BUILDER.

On the next page is a graphical overview of the steps in the process.

## ***What information storage formats does EquipMapper help transfer inventory information from?***

EquipMapper helps transfer facility information stored in the following formats:

- Generic Flat File format (instructions provided)
- BUMED - Updated RPIE Format
- DMLSS
- NNSA - Flat File Format
- Seymour Johnson Final
- USAF AETC/ACC (Access)

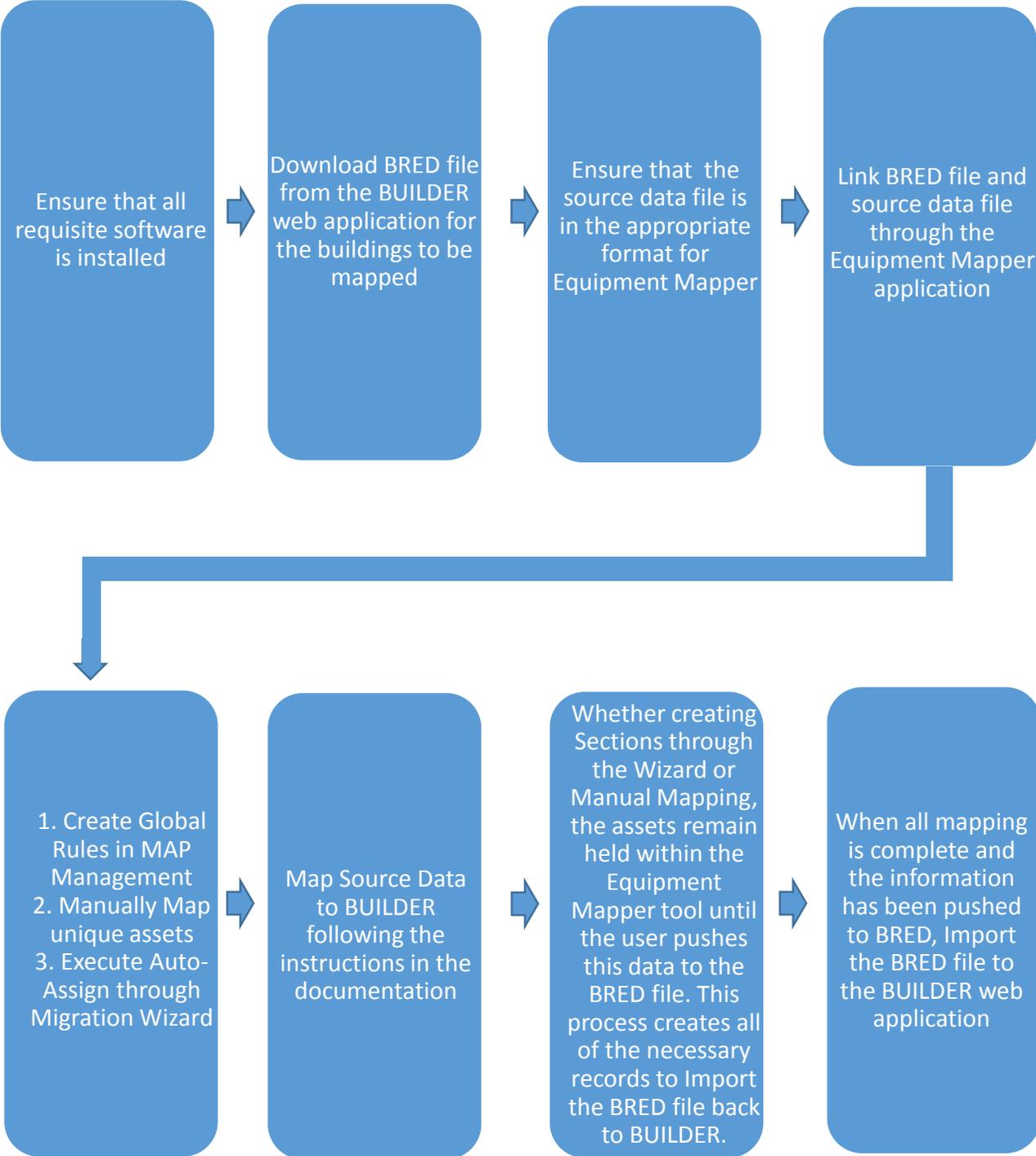
## ***How do I get started?***

To transfer facility information into BUILDER from one of the formats listed above using EquipMapper, you need to have the following software installed on your computer:

- The Sustainment Management System (SMS) with BUILDER.
- The latest version of BuilderRED, downloadable from the SMS website at:  
<http://sms.cecer.army.mil/SitePages/BUILDER%20Downloads.aspx>
- Microsoft Access, version 2010 or later.
- EquipMapper.

Once these are in place, you can continue at [Get Started with the EquipMapper Asset Mapper](#).

# Mapping Process Graphical Overview



# What's New in EquipMapper

The following changes have been made in EquipMapper for version 4.01.06.2016, published January 6, 2016:

## Terminology

- "Custom Mapping" is now termed "Global Migration".
- The alternative mapping method is now termed "Manual Mapping".
- "Final Review" has been renamed "Migration Review". In addition to using it as a final review, you may perform the review as many times as you wish during the migration process, returning to the active mapping screen using the **Back** button.
- The "Mapping Wizard" is now called "Migration Wizard".
- "Routes" have been renamed "Rules".

## Screen Changes

Changes have been made to the following screens (the new screen titles are being used in the headers below):

### *Migrate Assets to BUILDER SMS*

- The starting screen, formerly "Equipment Mapping for BRED Import to BUILDER SMS" has been renamed "Migrate Assets to BUILDER SMS".

### *Link Appropriate Resources*

- The screen "Choose the BRED File and Equipment List" has been retitled "Link Appropriate Resources".
- The field "Equipment List in Source Data Type" is now named "Source Data File".

### *Migration HQ*

- The "Select Facility to Map Equipment Data" screen has been renamed "Migration HQ".
- **Items Not Assigned** is no longer available directly from "Migration HQ". This button has been made available on the screens where you perform your mappings.
- The **Migration Review** (formerly **Final Review**) button has been made available on the screens where you perform your mappings, in addition to remaining at "Migration HQ".

### *Manage the Global MAP*

- The "Memory Mapping" screen has been redesigned and split into two separate screens: "Manage the Global MAP" and "Migration Wizard".
- From "Manage the Global MAP" you can now directly access **Migration Review** (formerly **Final Review**) and see a listing of **Items Not Assigned**. Look for the box labeled "Reporting" at the bottom of the screen.

### ***Migration Wizard***

- The Migration Wizard (formerly Routing Wizard) now has its own screen.
- Terminology in the Migration Wizard has changed; for example, "Routes" are now called "Rules".

### ***Manually Map Assets to Component Sections***

- The "EquipMapper" screen has been renamed "Manually Map Assets to Component Sections".
- Buttons have been added near the top of the screen that allow you to capture the Rules you map at this screen ("Capture Manually Mapped as Rules"), and to specify whether to favor global Rules over your manually mapped Rules ("Favor Global Rules in Dropdown Defaults").
- The Search Module has been renamed "Search Source Data".
- The "Equipment To be Placed in Section" area is now called "Selected Assets". You may either create a Section for items in this table, or else choose to Exclude them from mapping.
- The buttons at the bottom of the screen allow you to review mappings and to see a list of items not yet assigned. The **Edit Assignments** button has been renamed **Review Mapped Items**.
- There is no longer a button that will take you directly to the other mapping method. Instead, click **Back** to get to "Migration HQ", then click **Manage MAP**.

### ***Migration Review/Push to BRED***

- The "Review Mapped Items/Push Mapped Items to BRED File" screen is now called "Migration Review/Push to BRED".

### ***Review Sections***

- The "Section Mapping Review" screen is now "Review Sections".

# Get Started with the EquipMapper Asset Mapper

If you are re-entering EquipMapper to resume a data mapping you already have underway, then:

1. Start the EquipMapper tool.
2. Click the **Continue Mapping** button.

Otherwise, read and follow the instructions below to prepare your data and set up EquipMapper.

## Required Software

To transfer facility information into BUILDER from a different asset management system, you need to have the following software installed on your computer:

- The Sustainment Management System (SMS) with BUILDER
- The latest version of BuilderRED, downloadable from the SMS website at:  
<https://www.sms.erd.c.dren.mil/Products/BUILDER/Downloads> or  
<https://sms.cecer.army.mil/SitePages/BUILDER%20Downloads.aspx>
- Microsoft Access, version 2010 or later
- EquipMapper

## Prerequisites: Data Preparation and BRED File Creation

Before you open EquipMapper to start transferring information, you need to take some preparatory steps:

1. First, you will need to ensure that the information to be transferred is in a flat file or another approved format.
2. Second, you will need to make sure that your files have data in the required fields.
3. Third, you will need to use BUILDER prepare a database file called a "BRED file" to receive the information after it has been converted to BUILDER format.

Further details on each of these steps are given below.

### ***Step 1. Source Data Must Be in Flat File or Another Approved Format***

If your source data is in one of the following formats, you will be able to select your format after you start the EquipMapper tool:

- BUMED - Updated RPIE Format
- DMLSS
- NNSA - Flat File Format
- Seymour Johnson Final
- USAF AETC/ACC (Access)

If your source data is in another format, you will need to convert it to the Generic Flat File format. See [Generic Flat File Specifications](#) for instructions, being sure to note the required (and recommended) data fields.

### **Step 2. Ensure that Required Fields Have Data**

The data in Levels 1 through 4 of your source flat file will be used to help populate BUILDER Systems, Components, and Sections. However, there is additional data that is required or recommended in order for BUILDER Sections to be created properly. See the [Generic Flat File Specifications](#) for details.

### **Step 3. Create a BRED file in BUILDER**

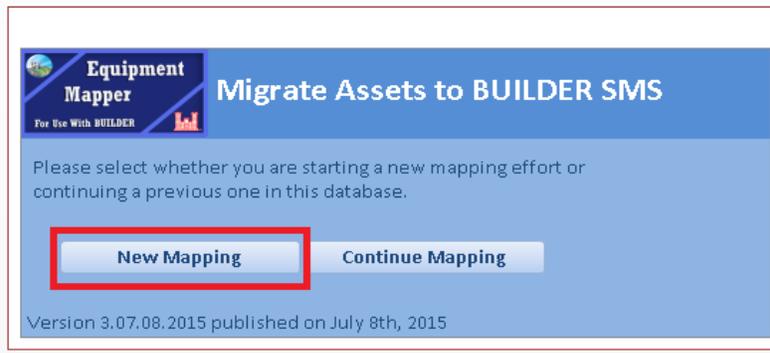
The BRED file will need to include every facility that you want to transfer any information to from your other software. However, it's not necessary to limit the BRED file to just those facilities, because EquipMapper will show only facilities that are included both in the source flat file and the destination BRED file.

For detailed instructions, see [Create a BRED File for Use with EquipMapper](#).

## **Start the EquipMapper Tool**

Once Steps 1 through 3 in Prerequisites above are completed, follow these steps to start the EquipMapper Tool:

1. Double-click the Equip Mapper Access file to open the tool. You should see the "Migrate Assets to BUILDER SMS" screen.
2. If necessary, click "Enable Content" in response to the Access Security Warning. Expect the "Migrate Assets to BUILDER SMS" screen to shift position when you do so.
3. Select **New Mapping** at the "Migrate Assets to BUILDER SMS" screen.



## **Designate the Source and Destination Files**

The following information must be supplied to EquipMapper at the "Link Appropriate Resources" screen:

1. Location of the BRED file.
2. Format of the source data.
3. Location of the source data.

### **Step 1. Designate the BRED File**

- a. At the first input box, browse to the BRED file and double-click.
- b. Alternatively, enter the path name and press **Enter**.

## Step 2. Select the Data Format of the Source Data

The screenshot shows the 'Equipment Mapper' interface for 'Link Appropriate Resources'. It features a 'BRED File' input field with a 'Browse...' button. Below this is a 'Select Source Data Format' dropdown menu. The dropdown is open, displaying a list of file formats: DMLSS, USAF AETC/ACC (Access), Seymour Johnson Final, NNSA - Flat File Format (highlighted), Generic Flat File, and BUMED - Updated RPIE Format. A 'Browse...' button is located to the right of the dropdown. At the bottom of the screen are 'Back' and 'Next' buttons.

From the dropdown list, select either **Generic Flat File** or one of the approved alternate formats.

## Step 3. Designate the Source Data File.

1. Select **Browse...** next to the third input box.
2. In the lower right corner of the popup (above the **Open** and **Cancel** buttons), activate the dropdown list of file formats and select **All Files** so that all file types will be displayed.
3. Browse to the location of your flat file or other source data file, and double-click it to select.

## Open the Databases

After you have specified the source and destination files, click the **Next** button and follow the on-screen instructions for opening the databases. You should arrive at the "Migration HQ" screen.

*Congratulations! You have completed the set-up procedures for your migration process.*

## Future Work Sessions

The next time you enter EquipMapper to work on the source/BRED file combination specified here, save time by selecting the **Continue Mapping** button at the title screen instead of **New Mapping**.

# Generic Flat File Specifications

If you will be using Generic Flat File as your source data format, you must adhere to the following Excel file format specifications.

## Prohibited Characters

- The following characters may not be used in (a) the Excel file name, (b) the worksheet name, or (c) a field name:  
Single quote, double quote, ampersand, backslash, left square bracket, right square bracket, greater than sign, less than sign. Namely, none of the following: ' " & \ [ ] > or <

## File and Worksheet Requirements

- The Excel file must have just **one** worksheet.
- The worksheet must be named FlatFile. The Excel file itself may be named anything you wish.

**Note:** for customized formats such as DMLSS or NNSA the required file name may differ.

## Field Name Requirements

- Not all of the field names listed in the table below need to be in your flat file. However, the column names you do include must be exactly as listed in column 2 of the table.

**Note:** If additional spaces are in the data field names, the names may look like they should match the requirements, but they will not.

- The first column of the table indicates which columns are required and which columns are recommended for inclusion in the generic flat file format. (For customized formats, the requirements may differ.)
- Column 3 shows the data type you need to use for each field given.
- See the following page for the full table of field names and specifications.

### Generic Flat File Format: Field Names and Specifications

Required Field?	Field Name	Data Type	Comments
	ID	Short Text	
Required	FacilityNumber	Short Text	
Required	FacilityName	Short Text	
Required	FacilityRPUID	Short Text	
Required	Level1	Short Text	
Required	Level2	Short Text	
Required	Level3	Short Text	
Required	Level4	Short Text	
	Level5	Short Text	
Recommended	UniquelIdentifier	Short Text	
	WarrantyCompany	Short Text	
	WarrantyStartDate	Date/Time	
	Capacity	Short Text	
	CapacityUnit	Short Text	
	Spec	Short Text	
	SpecUnit	Short Text	
Recommended	Location	Short Text	
Recommended	Rooms	Short Text	
	MfgName	Short Text	
	ModelNo	Short Text	
	MfgSerialNo	Short Text	
Strongly Recommended	InstallYear	Short Text	
	EstimatedDate	Yes/No	
Recommended	Quantity	Number	
Recommended	UoM	Short Text	Unit of Measure
	Floor	Number	
	Comments	Long Text	
	ConditionRating	Short Text	
	ConditionDate	Short Text	

# Create a BRED File for Use with EquipMapper

A BRED file is a database file containing information about assets that have been entered in BUILDER. Typically this file is exported to BuilderRED, BUILDER's Remote Entry Database program, to be used for collecting inventory information or performing inspections. For EquipMapper, on the other hand, the BRED file is used (1) to receive facility information from other asset management programs, and (2) as a vehicle to import the information into BUILDER.

## Preparation

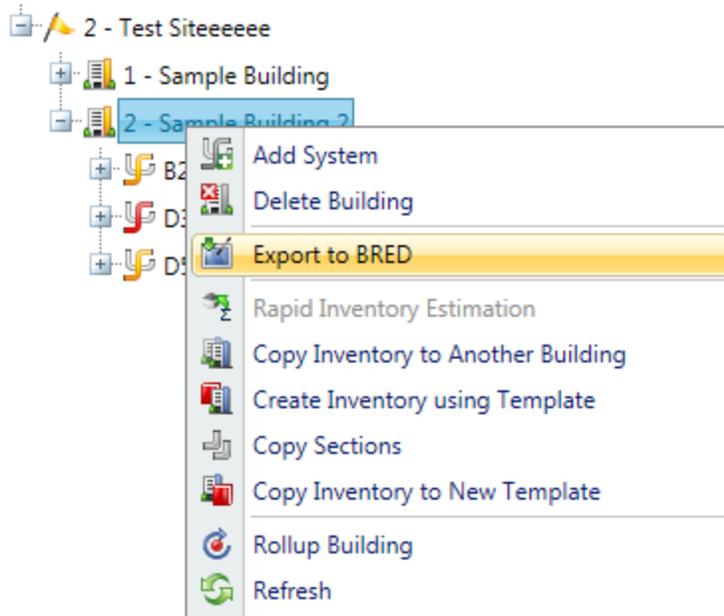
Before you can create a BRED database file for use with EquipMapper, you must first have an appropriate structure in place in BUILDER, down to the facility (Building) level. Once this information is in place in BUILDER, you can select a Site or one or more facilities (Buildings) to be exported into a BRED file. The section below describes the export process.

**Note:** For use with EquipMapper, you need to know the location (path name) of the BRED file. Depending on how your computer system is set up, your BRED export file may automatically route to your Desktop, your Downloads file, or to a TEMP file.

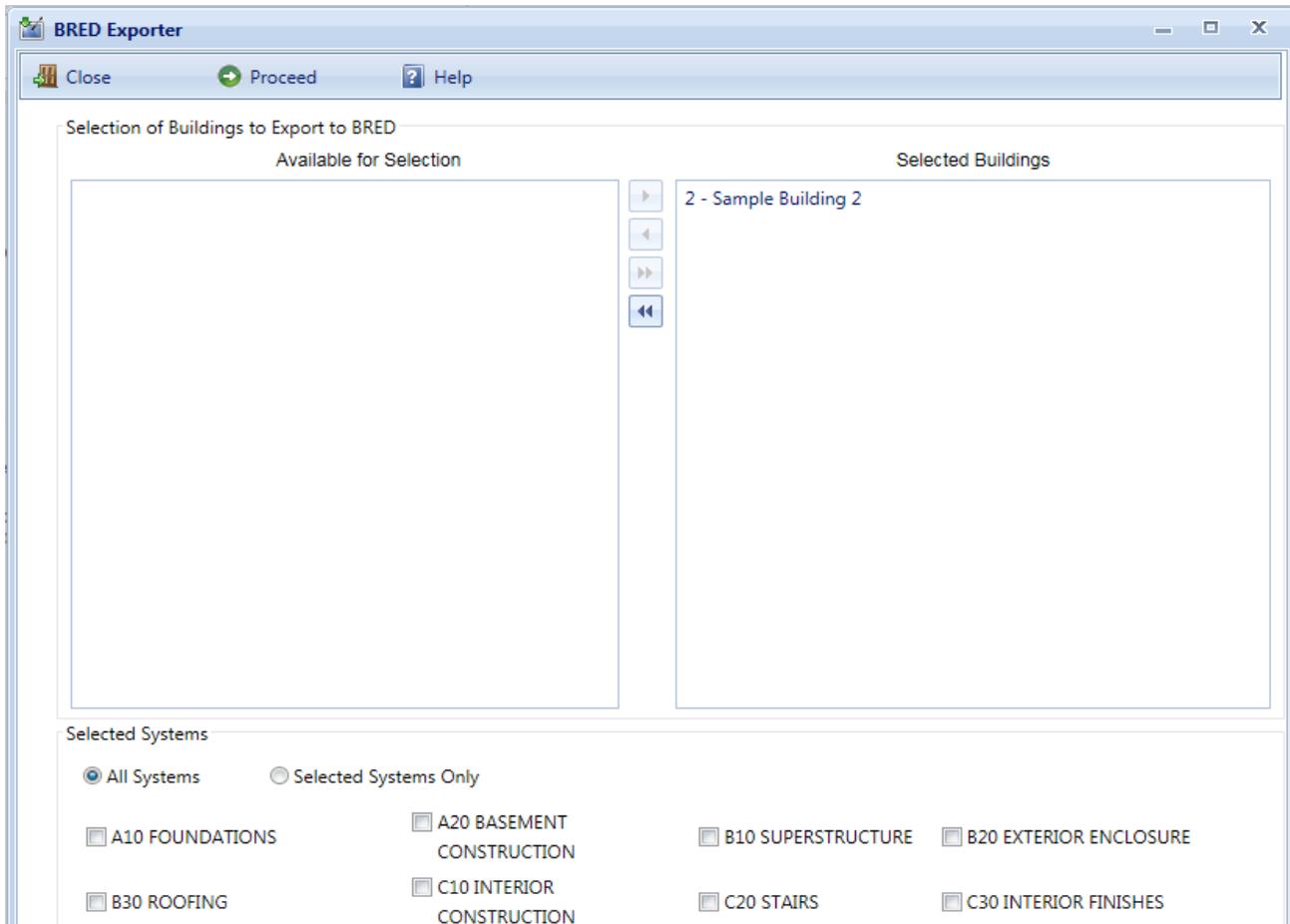
## Create the BRED File

To export data from BUILDER using a BRED file, do the following in BUILDER:

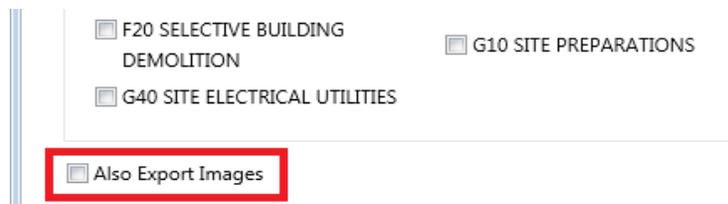
1. In the BUILDER navigation tree, right-click the lowest level node (Site, Complex, or Building) that contains the items you wish to export to a BRED file.
2. Select the **Export to BRED** option:



3. In the "BRED Exporter" window, do one of the following:
  - a. Choose **All Systems** (radio button), or
  - b. Select specific systems (radio button and checkboxes):

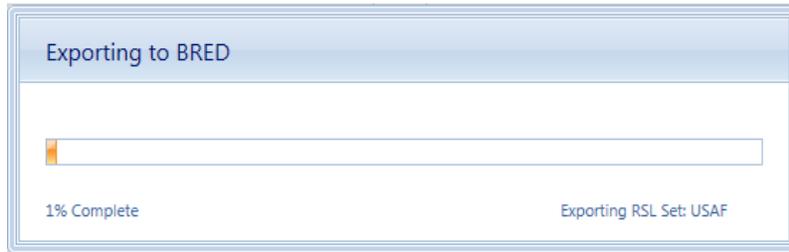


4. Because images are not needed for EquipMapper, leave the "Also Export Images" checkbox (lower left corner) unchecked:

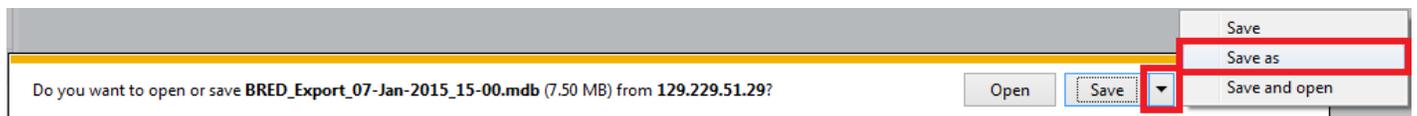


**Note:** If instead of "Also Export Images" you see "No Images to Export", it means that the facility or facilities you have selected to export do(es) not currently have any images.

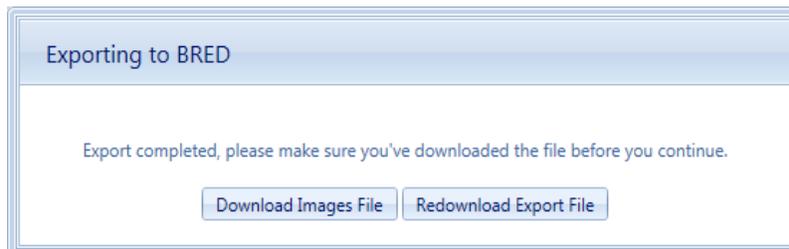
- To start the export, click the **Proceed** button near the top of the window. *A progress bar will display as the BRED database file is downloaded:*



- After the database file has successfully downloaded, select the **Save as** option to choose a file location for it:



- If the BRED file did not download correctly, click on **Redownload Export File**, then repeat the previous two steps.



- Because you are not downloading images, next select **Complete Export** to finish the export process.

**Note:** When using BRED in connection with EquipMapper, you need to know the location (path name) of the BRED file, but you do not need to open BuilderRED.

# Select a Mapping Method

The two methods of mapping data into BUILDER format are *global migration* and *manual mapping*. You may use just one; or one after the other; or you may alternate between the two. The recommended order is:

1. Specify migration Rules using the global migration option.
2. Run the Migration Wizard to activate the global migration Rules.
3. Use manual mapping to take care of remaining cases.

At the "Migration HQ" screen, you can choose between the two methods of mapping :

1. **Global Migration.** The Rules you create here will automatically be stored in the MAP. They will not, however, be applied until you run the Migration Wizard.
2. **Manual Mapping.** With this method, you manually identify BUILDER catalog locations corresponding to source data. You can use it for items that don't have the Section you want listed in the global migration option.

Equipment Mapper  
For Use With BUILDER

## Migration HQ

[Back](#)

**Global Mapping:** For this option, a facility does not need to be selected. Click "Manage MAP" to create global rules for the Migration Wizard to use in mapping assets to BUILDER inventory format.

**Manual Mapping:** Select a facility and click "Create Sections" to directly map asset data facility by facility.

Progress achieved by both processes is displayed in the table below.

Facility	Progress	Percentage
2056 - HOSPITAL MEDICAL STORAGE	0/21	0

**Global Mapping**

[Manage MAP](#) [Migration Wizard](#)

**Manual Mapping**

[Create Sections](#)

## How to Select Global Migration

- Click the **Manage MAP** button.

## How to Select Manual Mapping

- Select a facility from the table.
- Next, click the **Create Sections** button.

# Global Migration Method

This topic introduces the global MAP and covers how to import or export a MAP, how to populate a MAP by establishing global migration Rules, how to delete Rules from a MAP, and how to review your MAP.

At the "Manage the Global MAP" screen, you can construct Rules that will be automatically stored in the global Rule MAP. Then, when you run the Migration Wizard, the Wizard will apply the Rules to unmapped items in source data, saving you a great deal of work compared to the manual mapping method.

You may also find it advantageous to import or export a Rule MAP. For suggestions regarding strategic use of MAP import and export, see [Appendix B: Understanding the MAP](#).

## Welcome to the MAP

The MAP is a central repository for Rules about how to translate asset X in your source data to catalog item Y in BUILDER format. When you run the Migration Wizard, the Wizard will apply the MAP Rules to generate BUILDER Sections for all of the facilities listed at the "Migration HQ" screen. (The same facility list is also presented at the "Migration Review/Push to BRED" screen.)

### Where to Find the MAP

The map is shown on the "Manage the Global MAP" screen:

Level 2	Level 3	Level 4	BUILDER Code
B2030 EXTERIOR DOORS	B203004 OVERHEAD AND ROLL-UP DOORS	D509002712B EXIT LIGHT (EM)	D50 ELECTF
B2030 EXTERIOR DOORS	B203004 OVERHEAD AND ROLL-UP DOORS	D509002712B EXIT LIGHT (EM)	D50 ELECTF
B3010 ROOF COVERINGS	B301005 GUTTERS & DOWNSPOUTS	B203004499J OVERHEAD DOOR (EXT)	B20 EXTERI
D2010 PLUMBING FIXTURES	D201003 LAVATORIES	B203004499J OVERHEAD DOOR (EXT)	B20 EXTERI
D3040 DISTRIBUTION SYSTEMS	D304001 AIR DISTRIBUTION, HEATING & COOLING	B301005499J ROOF DRAIN	B30 ROOFII
D3050 TERMINAL & PACKAGE UNITS	D305006 PACKAGE UNITS	D201003499J LAVATORY ASSEMBLY	D20 PLUME
D3050 TERMINAL & PACKAGE UNITS	D305006 PACKAGE UNITS	D304001499J AIR HANDLING UNIT	D30 HVAC
D4010 FIRE ALARM AND DETECTION SYSTEMS	D401001 FIRE ALARM DISTRIBUTION	D305006642A SPLIT A/C CONDENSING UNIT	D30 HVAC
D4010 FIRE ALARM AND DETECTION SYSTEMS	D401001 FIRE ALARM DISTRIBUTION	D305006642A SPLIT A/C EVAP/BLOWER UNIT	D30 HVAC
D5010 ELECTRICAL SERVICE & DISTRIBUTION	D501003 INTERIOR DISTRIBUTION TRANSFORMERS	D304001499J AIR HANDLING UNIT	C20 STAIRS
D5010 ELECTRICAL SERVICE & DISTRIBUTION	D501004 PANELBOARDS	D401001499J TRANSMITTER	C20 STAIRS
		D501003690J TRANSFORMER (DRY TYPE)	D50 ELECTF
		D501004499J PANELBOARD	D50 ELECTF

### How Rules Are Entered into the MAP

The Rules in the MAP originate from up to three different sources:

1. The Rules you create using the Global Migration method.
2. The Rules that you create using the Manual Mapping method, if you choose to "capture" them.
3. Rules imported from the MAP file of another migration project.

The MAP keeps track of which source each Rule originates from. When you run the Migration Wizard, you will specify whether you want 1. or 2. from the list immediately above as primary in case of conflict (where asset X corresponds to more than one possibility for Y).

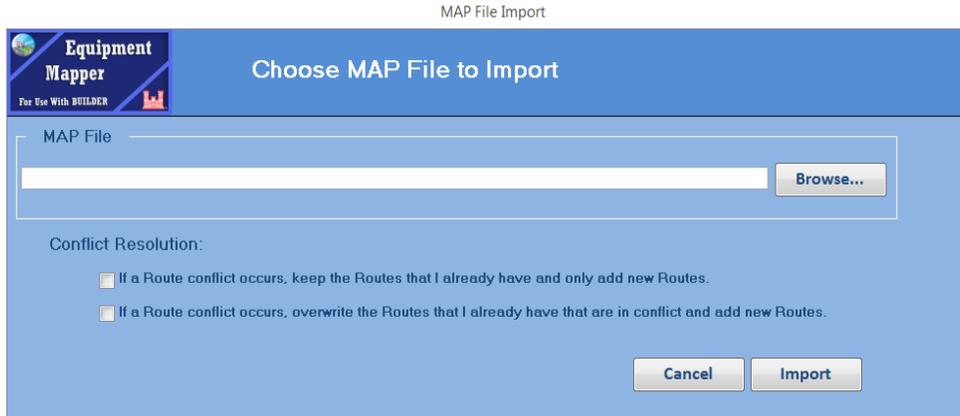
### Import a MAP File (optional)

At any time during your migration process, you can import a MAP file to increase the number of Rules in your MAP. If the imported MAP file has Rules that conflict with existing ones in your MAP, you can choose whether to prioritize the imported Rules.

If a new version of EquipMapper is available, you will want to export the MAP file from your current version, and use MAP file import to bring the information into the new version.

To import Rules from another MAP,

1. Click the **Import MAP** button, located just below the MAP on the left.  
*The "Choose MAP File to Import" screen, pictured below, will appear.*



2. Click **Browse...** and browse to the desired MAP file, which will be an Excel file.
3. Next, click one of the two checkboxes to indicate your preferred option for conflict resolution.
  - **Nondestructive:** The first Rule conflict resolution option for Import will keep all the Rules you have in your MAP intact, and only add Rules that are new.
  - **Potentially Destructive:** The second conflict resolution option for Import will give preference to the imported Rules. It will overwrite any Rules that you have that are in conflict with Rules being imported. It will *not* erase any Rules you have for assets not listed in the Import file.
4. When you are ready, click **Import**. Alternatively, click **Cancel** to cancel the operation.

## Add Rules to the MAP

This activity is what you will be doing the most of at the "Manage the Global MAP" screen. You will use the following entry boxes, near the top of the screen:

To add a Rule,

1. In the "Create New Map Rule" area, use the dropdown lists in the "FROM: Your Data" area to select an asset to be mapped into BUILDER format.
2. Use the dropdown lists in the "TO: BUILDER" area to specify the corresponding BUILDER catalog location, specifying System, Component, Material Category, and Component Type.
3. Once everything has been selected, click the **Create Rule** button. The Rule you created will appear in the MAP area in the center of the screen.

## Delete Rules from the MAP

### *Deleting MAP Rules*

To delete one or more Rules in the MAP,

1. Select the Rule(s). You can use the SHIFT key on the keyboard to select contiguous items, or the CTRL key to select discontinuous items.
2. Click the **Delete Selected Rules** button, located just below the MAP near the right. A confirmation message box will appear.
3. In the message box, click **Yes** to confirm the deletion; alternatively, click **No** to cancel.

### *Deleting All MAP Rules*

To clear all of the Rules in your MAP,

1. Click the red button labeled **Clear All Rules**. A confirmation message box will appear.
2. In the message box, click **Yes** to confirm the deletion; alternatively, click **No** to cancel.

## Review the MAP

After your data is entered in the MAP, you have the option of reviewing the MAP. To do so,

1. Click **View MAP Report** in the "Reporting" area at the bottom of the "Manage the Global MAP" screen. A non-editable spreadsheet will pop up, showing the following for each record:
  - ID number
  - Levels 1, 2, 3, and 4 from the source data format
  - The corresponding BUILDER catalog specification
2. Close the MAP report when you are finished reviewing it.

## Review or Edit BUILDER Catalog Locations

Another review option available in the "Reporting" area is the **Migration Review** button. This will take you directly to the "Migration Review/Push to BRED" screen. There, in addition to reviewing the BUILDER catalog locations in the MAP, you can also edit them. At the "Migration Review/Push to BRED" screen,

1. Select a facility.
2. Click **Review Mapped Items**. *This will bring you to the "Review Sections" screen.*
3. Navigate through the records using the buttons at the bottom of the screen.
4. Click the **Edit Section** button at the upper right of the screen for any Section you wish to edit.
5. When finished, click **Back** (upper left).

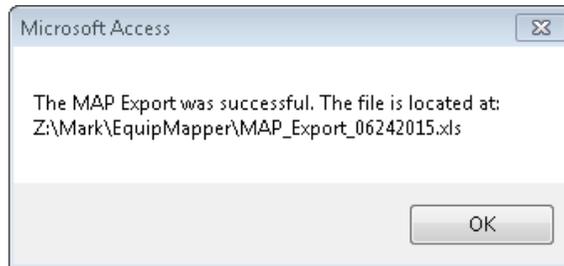
## Export the MAP (optional)

If a new version of EquipMapper is available, you will want to export the MAP file from your current version, and use MAP file import to bring the information into the new version.

To export the MAP,

- Click **Export Map**.

EquipMapper will give a name to the exported MAP file; this name will include the date. A popup message will tell you the path where the file has been stored. For example:



## Apply the MAP Rules to Your Data

In order to apply the MAP Rules to your data and actually create BUILDER-formatted records, you need to run the [Migration Wizard](#):

1. Click **Back** to get to "Migration HQ".
2. Then click **Migration Wizard**.

See [Migration Wizard](#) for how to use the Migration Wizard.

## How to Switch Between Mapping Methods

If you want to switch from doing global migration to doing manual mapping,

1. Click **Back** to get to "Migration HQ".
2. Then click **Create Sections**.

# Migration Wizard

## What Is the Migration Wizard?

The Migration Wizard is a resource that helps reduce the workload of migrating assets from your source data into BUILDER format. When you run the Migration Wizard, it uses the Rules stored in the MAP and applies them to all matching asset records found in any of the facilities listed in the table at the "Migration HQ" or "Migration Review/Push to BRED" screen.

## Usage Tips

You can run the Wizard multiple times as you progress through the migration process. The more complete the MAP is, the more Rule mappings the Wizard can perform for you.

The MAP can be built up in any or all of the following ways:

- Import a MAP file from another source. For instructions, see [Import a MAP File \(optional\)](#)
- Enter MAP Rules using the global migration method. Rules entered this way are automatically stored. For instructions, see [Global Migration Method](#)
- At the "Manually Map Assets to Component Sections" screen, make sure that "Capture Manually Mapped as Rules" is toggled ON when you identify BUILDER catalog locations corresponding to the items being mapped. See [Manual Mapping Method](#) for more about manual mapping.

If there is another facility or site that has similar assets, you can import Rules created for that other facility or site, then add additional Rules. If migration of the other site's assets is also still in progress, you could then export your MAP to augment the other site's MAP file.

## Run the Migration Wizard

To get started, click the **Start Wizard** button in the "Migration Wizard" screen. You will be stepped through three selection pages, described in "Select Wizard Parameters" below.

### **Select Wizard Parameters**

1. For "Primary Mapping Source", choose either:
  - a. "Global Rules", or
  - b. "Individually Captured Rules".
2. For "Secondary Mapping Source", choose either:
  - a. The alternate mapping method, or
  - b. "None".
3. At Sectioning Options, you select one or more ways of dividing like source data items into separate sections. Because sectioning by location would in many cases produce over-detailed sectioning, the recommended default sectioning is:
  - a. "by Vintage" if the facility does not have multiple floors; otherwise,
  - b. "by Floor", followed by "by Vintage".

At this point, the Wizard will present a review of the options you selected.

**Primary Mapping Source**  
Section inventory using the Manually Mapped Rules created by manually mapping sections.

**Secondary Mapping Source**  
Section inventory using the Global MAP Rules as a second tier.

**Sectioning Options**  
Section inventory based on the following criteria: Vintage, Floor

[Back](#) [Perform Auto-Assign](#)

### Review Your Selections

1. Review the three selections presented by the Wizard.
2. If you want to make changes to your options based on the review, click the **Back** button *inside* the "Auto-Assign" area. Step back to where you want to make the change and re-make your selections from that point forward.

**Note:** Be sure to click the back button inside the "Auto-Assign" area, not the one that is at the top left of the screen, or you will lose your Wizard selections.

### Perform Auto-Assign

1. When the review presented matches the options you want, click **Perform Auto-Assign** to start the Wizard.
2. On completion, a message box will prompt you to run the 'Items Not Assigned' report. Running the report is not mandatory, but click **OK** anyway to be brought to the "Manage the Global MAP" screen.

### Run the 'Items Not Assigned' Report

1. When the Migration Wizard completes the auto-assign process, you will be prompted to run the 'Items Not Assigned' report.
2. Click **OK** in the alert box. EquipMapper will bring you to the "Manage the Global MAP" screen.
3. If you want to see what remains to be assigned after running the Migration Wizard, click the **Items not Assigned** button in the "Reporting" section of the screen (see image below).

**Note:** Be careful not to accidentally close EquipMapper instead of the "Items Not Assigned" report. You may need to scroll to the right to reach the upper right corner of the "Items Not Assigned" pop-up.

Reporting

[View MAP Report](#) [Items Not Assigned](#) [Migration Review](#)

## What Next?

After running the Wizard and being brought to the "Manage the Global MAP" screen,

1. If you are finished with all mapping, or just want to review your migration progress, click the **Migration Review** button in the "Reporting" section.
2. If you want to do global migration, you are already at the correct screen.
3. To switch to manual mapping from the "Manage the Global MAP" screen, click the **Back** button. Then, at "Migration HQ", click the **Create Sections** button.

# Manual Mapping Method

This mapping option can be used to customize your Rules beyond what is available using the global migration method. The customized Rules you create here can be captured into the MAP, or not, depending on your settings.

Note that capture is optional, and must be toggled ON in order for your Rules to be stored in the MAP. If "Capture Manually Mapped as Rules" is toggled OFF, then your mapped items will be stored as BUILDER Sections, and they will be pushed to the BRED file for import into BUILDER when you complete your process; but the Rule will not be stored, and it will not be in the MAP.

## Overview

### *Workflow Overview*

Note that unlike the global migration method, which works across all of the listed facilities, you do manual mapping one facility at a time.

At the "Manually Map Assets to Component Sections" screen, you will either fill in Level 1, 2, and 3 information or use the "Search Source Data" function to narrow down a portion of source data to be loaded into the "Available Assets" area.

In the "Available Assets" area, greater detail will be shown for the assets. Here you will use the checkboxes in the "Move" column to select one or more assets to be grouped together as a BUILDER Section. When you click the down arrow button, the selected asset(s) will appear in the "Selected Assets" area.

For the item(s) in the "Selected Assets" area, you will then enter the corresponding BUILDER catalog location, or accept the default catalog location if one is provided, and click **Create Section**. Alternatively, you may choose to exclude the item(s) from mapping.

Once a Section is created (or the asset is excluded), then you can return to the "Available Assets" area of the screen to select another asset or group of assets.

### *Mapping Re-Use*

EquipMapper enables re-use of your Rules generated with manual mapping. The first time you manually create a mapping Rule from a particular type of asset in your source file to a corresponding BUILDER catalog location, a counter will be created for that Rule and then set to 1. The next time you select the same source asset type, EquipMapper will automatically fill in the "Create Section" area with the corresponding BUILDER catalog location by default. Once the default is displayed, your options are as follows:

- Accept the pre-stored Rule (the counter for that Rule will be incremented by 1 if you do),
- Identify a different BUILDER catalog location for that asset, or
- Exclude the asset from the mapping process by clicking **Exclude From Mapping**.

Each time you re-use a particular Rule, its counter will be incremented. If there is more than one BUILDER catalog location mapped to a source asset, the Rule with the highest counter will be the one that appears by default in the "Create Section" area.

If you have no Rule applied to a particular source asset, then EquipMapper will insert a BUILDER catalog location that has been identified using the global migration method, if available. If there is also no global Rule for the item, then the "Create Section" area will be blank.

**Note:** the above description is what happens when the "Favor Global Rules in Dropdown Defaults" toggle button is set to OFF. See the next section below, "Using Global MAP Rules as Defaults", for additional options.

### **Using Global MAP Rules as Defaults**

Near the top of the "Manually Map Assets to Component Sections" screen are two toggle buttons. One of these is "Favor Global Rules in Dropdown Defaults".



The section "Mapping Re-Use", above, describes how defaults are loaded into the "Create Section" area if "Favor Global Rules in Dropdown Defaults" is toggled OFF.

If you toggle this button to ON, then what appears as a default in the "Create Section" area will be one of the following, in priority order:

1. If available, the corresponding BUILDER catalog location mapped using the global migration method.
2. If available, a corresponding BUILDER catalog location mapped using manual mapping. The Rule with the highest counter value will be selected. (See the "Mapping Re-Use" section above for an explanation of the counter.)
3. Otherwise, the "Create Section" area will be blank. You will need to fill it in by using the dropdown lists and providing a Section Name (optional), Quantity, and Install Year.

### **Using Manually Mapped Rules as Defaults**

If you want your Rules generated with manual mapping to take priority over Rules generated using the global migration method when EquipMapper populates dropdown lists with defaults, then set the "Favor Global Rules in Dropdown Defaults" toggle button to OFF.

If you toggle the button to OFF, then a previous manually mapped Rule that you have made, if available, dictates what will appear by default in the "Create Section" area when you have one or more assets in the "Selected Assets" area. Second in line is a Rule created using the global migration method, if available.

### **Capturing Your Mappings into the Global MAP**

If you set the "Capture Manually Mapped as Rules" toggle button, near the top of the screen, then EquipMapper will store your manually generated Rules in the global MAP. This applies to mapping Rules you create while the toggle button is ON.

## How to Manually Map Asset Data to BUILDER Format

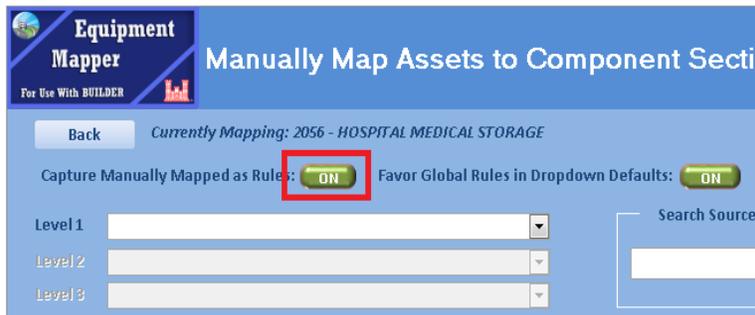
To manually map asset data to BUILDER format, you will take the following steps:

1. Toggle capture ON if you want to capture your manually mapped Rules into the global MAP.
2. Populate the "Available Assets" grid.
3. Select one or more assets to map to a BUILDER catalog location.
4. Specify a BUILDER catalog location to receive the asset(s).
5. Repeat steps.
6. Review.

You also have the option to exclude items from mapping, discussed at [Excluding Items From Mapping](#), below.

### Step 1: Toggle Capture ON

- At the "Manually Map Assets to Component Sections" screen, make sure that the "Capture Manually Mapped as Rules" option is toggled ON if you want the Rules you create here to be stored in the global MAP. (Only Rules created using the global migration method are automatically captured and stored.) You can find the button near the top of the screen, below the facility name.

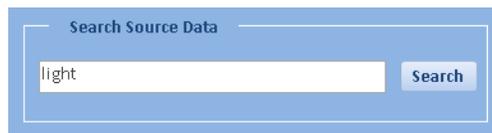


The screenshot shows the 'Equipment Mapper' interface for 'Manually Map Assets to Component Sections'. At the top, it says 'For Use With BUILDER'. Below that, there's a 'Back' button and 'Currently Mapping: 2056 - HOSPITAL MEDICAL STORAGE'. Two toggle switches are visible: 'Capture Manually Mapped as Rules: ON' (highlighted with a red box) and 'Favor Global Rules in Dropdown Defaults: ON'. Below these are three dropdown menus labeled 'Level 1', 'Level 2', and 'Level 3'. To the right, there's a 'Search Source' section with a search input field.

### Step 2: Populate the Available Assets Grid

There are two ways to populate the "Available Assets" grid:

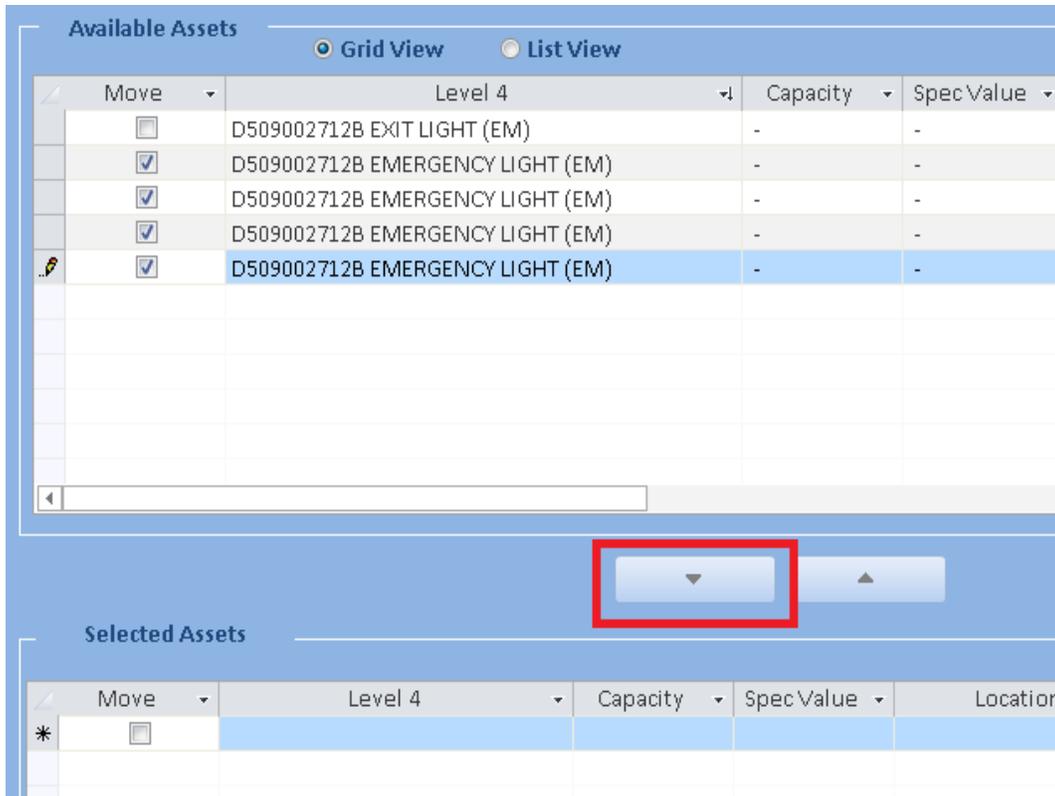
1. Use the dropdown lists at the top of the screen to specify Levels 1 through 3. All assets that match these specifications will populate the "Available Assets" grid.
2. Alternatively, you can use the "Search Source Data" option, which will insert any corresponding information into the "Available Assets" grid.



The screenshot shows a 'Search Source Data' search box. It has a search input field containing the text 'light' and a 'Search' button to its right.

### Step 3: Select Assets to Map to a BUILDER Catalog Location

1. In the "Available Assets" grid, either check the "Select All" checkbox (top right above the grid), or mark the "Move" checkbox next to one or more items to be placed in the BUILDER Section that you will map to.



2. After you have made your selections, click the button with the down arrow (see illustration) to move the selected assets to the "Selected Assets" area.

**Important:** Select for each move only one item, or else items that you want combined into one BUILDER Section.

**Note:** If you accidentally move into the "Selected Assets" section an item that you did not intend to, then mark its "Move" checkbox and click the up arrow.

**Step 4: Identify a BUILDER Catalog Location to Receive the Record(s)**

1. For the item(s) you selected, specify the Section Name (optional), System, Component, etc. for the BUILDER Section that the asset(s) will be mapped to.

The 'Create Section' form contains the following fields:
 

- Section Name: [Text input field]
- System: [Dropdown menu]
- Component: [Dropdown menu]
- Material Category: [Dropdown menu]
- Component Type: [Dropdown menu]
- Quantity: [Text input field with value '1']
- Install Year: [Text input field]
- [Create Section button]

2. Click **Create Section** when you are finished entering the information.

**Note:** If you have one or more items that do not need to be stored in BUILDER, see the section [Excluding Items From Mapping](#), below.

### Step 5: Repeat Steps

- If there are still assets in the "Available Assets" area, repeat Steps 3 and 4.
- If the facility still has unmapped assets, go back to Step 2 (unless you wish to change capture options; in that case, see Step 1 and choose to toggle the capture ON or OFF).
- If you are finished mapping a facility and want to change facilities, look for the **Back** button at the top of the screen; it will bring you back to the "Migration HQ" screen to select a different facility.

**Note:** When undertaking to map a facility, it is usually more advantageous to first do global migration and secondly to run the Migration Wizard before embarking on manual mapping.

- If you are finished with manual mapping of all desired facilities, proceed to Step 6.

### Step 6: Review

- When finished, you have the option to click the **Review Mapped Items** button (near the bottom of the screen) to make changes.
- To see what remains to be assigned, you can click the **Items not Assigned** button in the "Reporting" section of the screen.

**Important:** Be careful not to accidentally close EquipMapper instead of the "Items Not Assigned" report. You may need to scroll to the right to reach the upper right corner of the "Items Not Assigned" pop-up.

- If you are finished with all mapping, or just want to review your migration progress, click the **Migration Review** button at the bottom of the screen.



## Excluding Items From Mapping

You may have items that do not need to be transferred to BUILDER (for example, snow blowers or lawn mowers), but in order for you to accurately assess your progress in mapping your data, you don't want these items treated as Items Not Assigned.

For these items, do the following:

1. Do **not** fill in any Section information for the item(s) in the "Create Section" area.
2. Instead, press the button labeled **Exclude from Mapping**, to the right of the "Create Section" area. Result: Whatever items you have in the area labeled "Records to be included in Section" will instead

be marked as Excluded. With respect to progress count and percentage completion, they will be treated as completed.

If you want to review your excluded items, go to the "Migration Review/Push to BRED" screen and click **Review Map Exclusions**. The "Review Assets Excluded from Mapping" screen will appear.

If you accidentally exclude something from mapping that you did not intend to do so, do the following:

1. Go to the "Migration Review/Push to BRED" screen and click the **Review Map Exclusions** button. The "Review Assets Excluded from Mapping" screen will appear.
2. To un-exclude an item, select it and click **Restore to Mappable List**.

## **How to Switch Between Mapping Methods**

If you want to switch from doing manual mapping to doing global migration, click **Back** to get to "Migration HQ", then click **Manage the MAP**.

# Migration Review

At the "Migration Review/Push to BRED" screen, you will see a table that shows both your percentage progress through each of the facilities and the number of mapped items vs. total number of items in your source file. (Excluded items are not included in either the mapped count or the total count.)

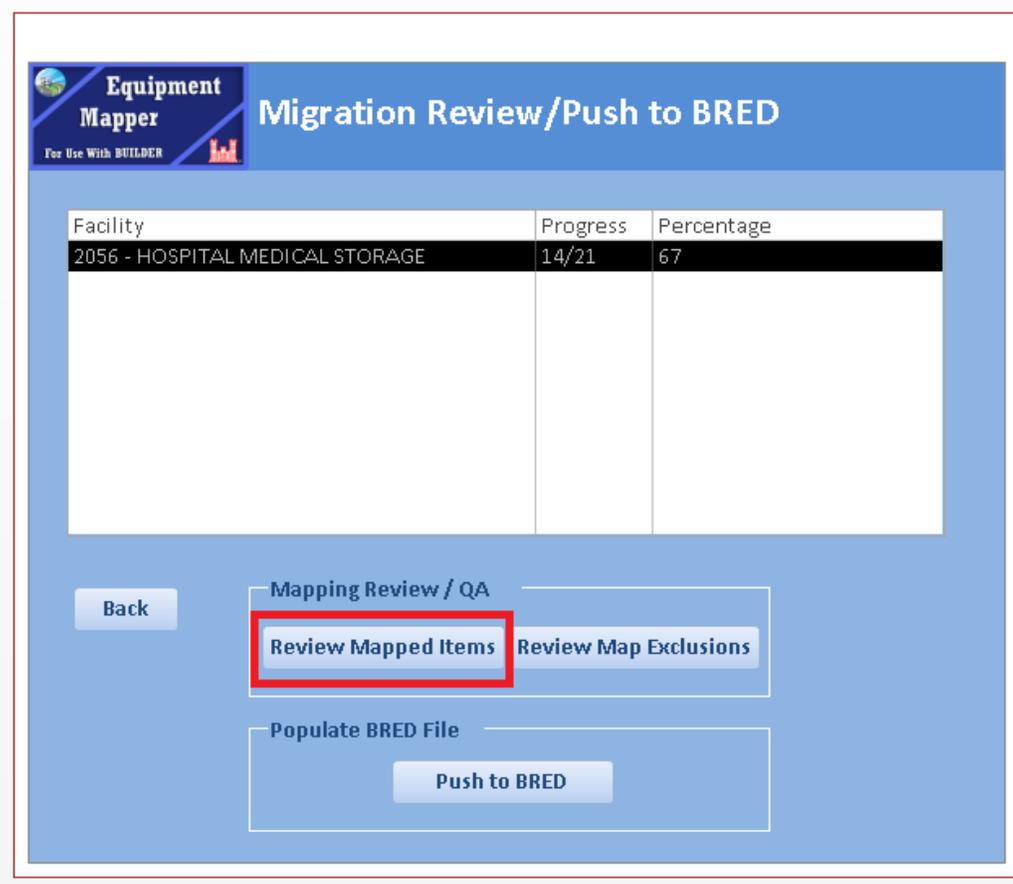
This is also where you can review both your mapped items and items you have chosen to exclude from mapping.

Migration Review may be done as often as desired during your migration progress.

## Review Mapped Items

To review and/or edit the BUILDER information in your mapped items,

1. Select a facility.
2. Click **Review Mapped Items**. *This will bring you to the "Review Sections" screen.*

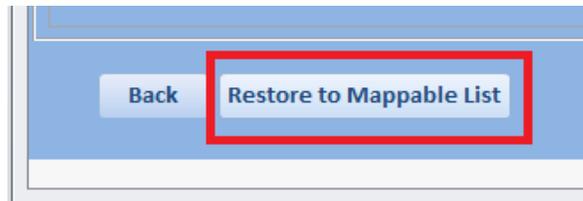


3. Navigate through the records using the buttons at the bottom of the screen.
4. Click the **Edit Section** button at the upper right of the screen for any section you wish to edit.
5. When finished, click **Back** (upper left).

## Review Map Exclusions

Another option at the "Migration Review/Push to BRED" screen is to review the items that you have excluded from mapping. To do so,

1. Click the **Review Map Exclusions** button. You will be presented with a window titled "Review Assets Excluded from Mapping".
2. If there are any items in the listing that you decide you no longer want excluded, select the item(s) and click the **Restore to Mappable List** button. You will then need to map these items using either global migration or manual mapping.

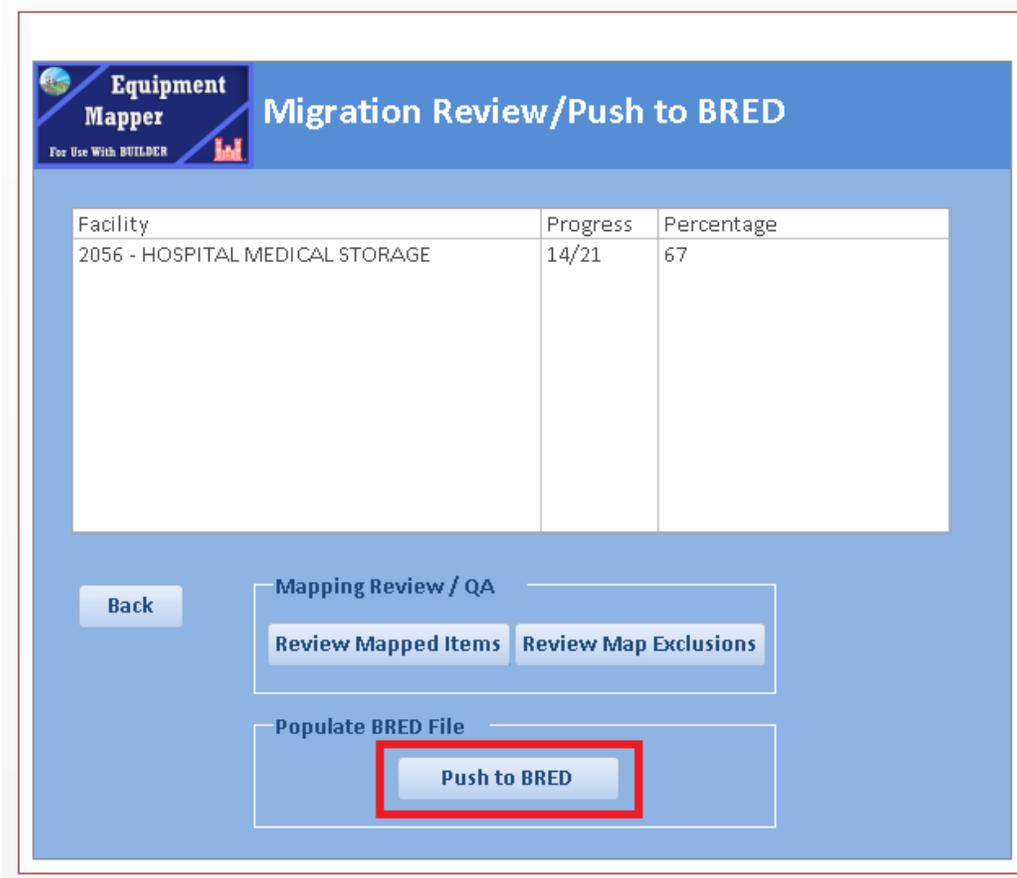


3. Click **Back** when finished.

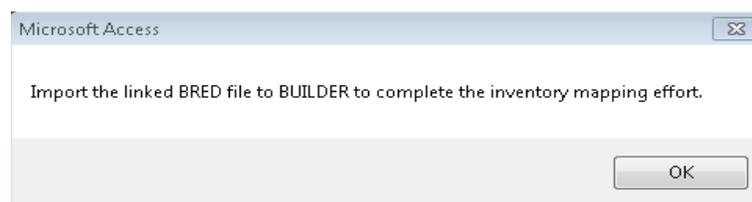
# Transfer Information to the BRED File

When all reviews are finished,

1. Click the **Push to BRED** button on the "Migration Review/Push to BRED" screen. This will create BUILDER Sections using your MAP Rules and will populate the BRED file with them:



2. You should see a popup message reminding you of the final step needed:



3. You will need to use BUILDER to do the import from BRED to BUILDER.

# Appendix A: Quick Review of the Steps in the Mapping Process

Here is a quick rundown of the steps in the migration process, with links to more detailed descriptions.

## Prepare the Data

- If your source data is in one of the following formats, you will be able to select that format from a dropdown list of format options:
  - BUMED - Updated RPIE Format
  - DMLSS
  - NNSA - Flat File Format
  - Seymour Johnson Final
  - USAF AETC/ACC (Access)
- Otherwise, before you open and use the EquipMapper tool, you should put your data into Generic Flat File Format. This format must be followed exactly. See [Generic Flat File Specifications](#).

## Create a BRED File

- See [Create a BRED File for Use with EquipMapper](#).

## Open the EquipMapper Program

- If necessary, choose "Enable Content" in response to the Access Security Warning.
- Select **New Mapping** at the "Migrate Assets to BUILDER SMS" screen.

## Enter the Source and Destination Files

- At the "Link Appropriate Resources" screen, enter the following information:
  1. BRED File: Select **Browse...** next to the first input box and browse to the BRED file that you created to receive your data; double-click the BRED file to select it.
  2. Source Data Format: In the "Select Source Data Format" area, click the down arrow and select a format from the dropdown list. See [Prepare the Data](#) for a list of the formats.
  3. Source Data File:
    - First, select **Browse...** next to the third input box.
    - Second, in the lower right corner of the popup (above the **Open** and **Cancel** buttons), activate the dropdown list of file formats and select **All Files** so that all file types will be displayed.
    - Third, browse... to the location of your flat file or other source data file; to select the file, double-click on it.
- Click **Next** when you are finished entering the information.
- Follow the instructions for opening tables from a database five consecutive times.

## Choose a Mapping Method: Global Migration or Manual Mapping

There are two methods of mapping: global migration and manual mapping. You may use just one; you may use one after the other; or you may alternate between the two of them. The recommended order is to do

what you can using the global migration method, then run the Migration Wizard to activate the global Rules, and finally to implement manual mapping.

- For global migration, click the **Manage MAP** button at the "Migration HQ" screen.
- For manual mapping, click the **Create Sections** button at the "Migration HQ" screen.

### Global Migration

At the "Manage the Global MAP" screen,

- Use the dropdown lists in the "FROM: Your Data" area to select an asset to be mapped into BUILDER format.
- Use the dropdown lists in the "TO: BUILDER" area to specify the corresponding BUILDER catalog location.
- Click the **Create Rule** button. The Rule you just created will appear in the MAP area in the center of the "Manage the Global MAP" screen.
- For using the Import MAP and Export MAP options, see [Global Migration Method](#) in the main documentation, and [Appendix B: Understanding the MAP](#).

### Migration Wizard: Run the Wizard

- Note that you can run the Wizard multiple times as you refine your Rules.
- To run the Migration Wizard, navigate to the "Migration Wizard" screen from "Migration HQ", then click the **Start Wizard** button. Here you will specify:
  1. Primary Mapping Source: Choose "Global Rules" or "Individually Captured Rules".
  2. Secondary Mapping Source: Choose either (a) the alternate mapping method, or (b) "None".
  3. Sectioning Options: Here you select one or more sectioning options. Recommended is "by Vintage" if the facility does not have multiple floors; otherwise, "by Floor", followed by "by Vintage". Sectioning by location would in many cases produce an overfine sectioning.
- After reviewing your selections, click the **Perform Auto-Assign** button to start the Wizard.
- Click **OK** in the message box. You will be brought to the "Manage the Global MAP" screen.
- If you want to see what remains to be assigned after running the Migration Wizard, click the **Items not Assigned** button in the "Reporting" section of the screen.

**Important:** Be careful not to accidentally close EquipMapper instead of the Items Not Assigned report. You may need to scroll to the right to reach the upper right corner of the "Items Not Assigned" pop-up.

- To switch to manual mapping from the "Manage the Global MAP" screen, click the **Back** button. Then, at the "Migration HQ" screen, click the **Create Sections** button.
- If you are finished with all mapping, or just want to review your migration progress, click the **Migration Review** button in the "Reporting" section.

### Manual Mapping

At the "Manually Map Assets to Component Sections" screen,

- Make sure that "Capture Manually Mapped as Rules" is "ON" (at the top of the screen, below the facility identifier) if you want the Rules you create here to be stored in the MAP. Only the items

created using the global migration method are automatically captured and stored.

- Use the Levels 1 through 3 dropdown lists at the top of the screen to select assets to populate the "Available Assets" grid.
- Alternatively, you can use the "Search Source Data" option, which will insert any corresponding information into the "Available Assets" grid.
- In the "Available Assets" grid, either check "*Select All*" (top right above the grid), or mark the "Move" checkbox next to each asset to be placed in the BUILDER Section that you will identify.
- After you have made your selections, click the button with the down arrow to move the asset(s) to the "Selected Assets" area.

**Note:** Move at one time only assets you want grouped together into a single BUILDER Section.

- Next, specify the Section name, System, Component, etc. for the BUILDER Section that the asset (s) will be mapped to.
- Click **Create Section** when you are finished entering the information.
- If you have one or more items that do not need to be stored in BUILDER, see the section [Excluding Items from Mapping](#) below.
- When finished, you have the option to click the **Review Mapped Items** button to make changes.
- If you are finished with all mapping, or just want to review your migration progress, click the **Migration Review** button at the bottom of the screen.

### Excluding Items from Mapping

- If you have one or more items that do not need to be stored in BUILDER, you can use the **Exclude From Mapping** button on the "Manually Map Assets to Component Sections" screen. The selected items will be flagged as completed, but will not be stored in the BRED file for transfer to BUILDER.

### Migration Review

The "Migration Review/Push to BRED" screen shows both your percentage progress through each of the facilities and the number of mapped items vs. total number of items in your source file.

- Select a facility.
- Click the **Review Mapped Items** button.
- At the "Review Sections" screen, use the navigation buttons to progress through your mappings. You can also edit BUILDER Section information here.
- When finished, click **Back**.
- If desired, click the **Review Map Exclusions** to review exclusions.
- This review may be done as often as desired during your migration progress.

### Populate the BRED File

- When you are satisfied with all of the mappings in each facility, click the **Push to BRED** button. This will create BUILDER Sections using your Rules and will populate the BRED file with them.
- It is also acceptable to populate the BRED file before you are finished with your migration. Each time you push your to BRED, EquipMapper removes everything it added to BRED and "re-pushes" the correct information.

# Appendix B: Understanding the MAP

## What is the MAP?

The MAP is a central repository for Rules about how to translate asset X in your source data to catalog location Y in BUILDER format. When you run the Migration Wizard, the Wizard will apply the MAP Rules to generate BUILDER Sections for all of the facilities listed at the "Migration HQ" screen. (The same facility list is also presented at the "Migration Review/Push to BRED" screen.)

## Use MAP Export and Import When You Upgrade EquipMapper

If a new version of EquipMapper is available, use MAP Export to export a MAP file from your current version of EquipMapper. Then use MAP Import to load the information into the new version.

## Where Do the MAP Rules Come From?

The Rules that you create in the MAP originate from up to two different sources:

1. The Rules you create using the Global Migration method.
2. The Rules that you create using the Manual Mapping method, if you choose to "capture" them.

The MAP keeps track of which source each Rule originates from. When you run the Migration Wizard, you will specify which of the two sources you want as primary in case of conflict (where asset X corresponds to more than one possibility for Y).

## How Do I Build a MAP?

In addition to building up a map with Rules you create by using the global migration method and by capturing manual mappings, you can also import MAP Rules by importing a MAP file into your own MAP.

## How Can I Use MAP Import to Reduce My Workload?

If you or someone else has mapped or is mapping similar assets, you can expand the number of entries you have in your MAP by importing the MAP file from the other effort.

See [Import a MAP File \(optional\)](#) in [Global Migration Method](#) for how to import a MAP file.

If mapping of both asset lists is still in progress, you can import the MAP file from the other effort, and export your own MAP file to share.

**Note:** It's a good idea to run the 'Items Not Assigned' report after an import, to see what remains to be mapped in the new project after applying the imported Rules.

## How Can I Use MAP Export to Reduce My Workload?

You may also find it advantageous to export a MAP, because you can use it to build up a library of MAP Rules for future use.

When you finish mapping a facility or a group of facilities, export your MAP. Then when you are ready to map new facilities, you can import the MAP you created into the new project.

**Note:** It's a good idea to run the 'Items Not Assigned' report after an import, to see what remains to be mapped in the new project after applying the imported Rules.

See [Review the MAP](#) in [Global Migration Method](#) for how to export a MAP file.

# Appendix C: Troubleshooting Guide

This Troubleshooting Guide appendix describes some problems encountered in using the EquipMapper asset mapper, and their solutions.

It is expected that future troubleshooting reports will be posted on the SMS website.

## **Problem:**

I clicked on "New Mapping" (or "Continue Mapping"), but nothing happens.

## **Solution:**

1. Look for an Access Security Warning ("Some active content has been disabled...").
2. Click the Access **Enable Content** button.
3. Wait for the "Migrate Assets to BUILDER SMS" screen to refresh (it will probably change position).
4. Now make your New or Continue selection one more time.

## **Problem:**

My source data file is missing--I tried to browse to it, but I don't see it.

## **Solution:**

The Microsoft Access default for file formats shown does not include your source data file format. To allow your source data file to be displayed in the selection window, do the following:

1. In the lower right corner of the popup (above the **Open** and **Cancel** buttons), activate the dropdown list of file formats.
2. Select **All Files** so that all file types will be displayed.

## **Problem:**

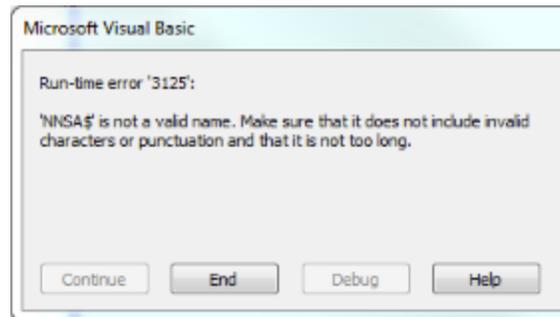
When I check my progress, the EquipMapper tool says it has completed more than 100% of the data.

## **Solution:**

There are multiple rows in the flat file that have the same ID number, which is supposed to be a "unique" identifier. This appears to be throwing the tool off, as it is expecting a truly unique value. If there is not a unique value, please leave the ID column blank. EquipMapper handles the blanks and assigns it a temporary unique ID that will allow the tool to handle the records properly and then remove those values prior to pushing it to BRED.

**Problem:**

I receive an error message like this:



**Solution:**

The problem is an incorrect Sheet name in the workbook. Look for the following potential problems:

- a. Is the sheet still named 'Sheet1' instead of being named correctly?
- b. Does it contain any prohibited characters?

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