Pegasys Quick Reference Guide

MASS IMPORT

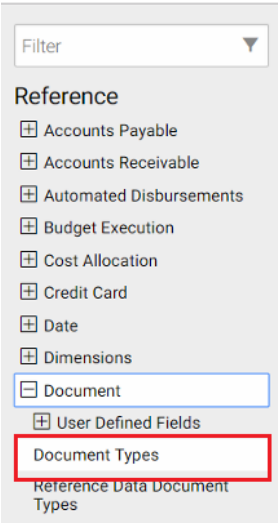
Mass Import is a method by which a user can import and process forms in Pegasys.

Mass Import uses a formatted Excel input file that contains the fields on a Pegasys form that users can populate. The Mass Import Macro can be utilized to populate the Excel input file.

Processing a Mass Import Template

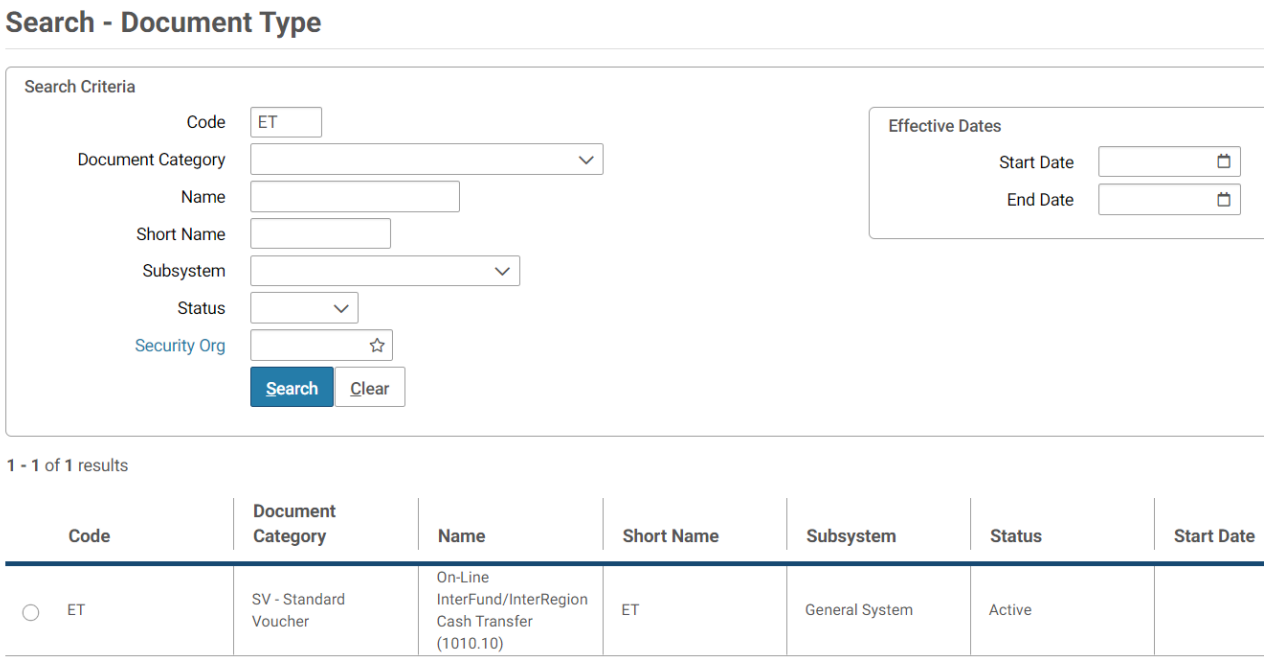
1. Login to Pegasys and Navigate to Reference > Document > Document Types.

Figure 1: Navigation to Document Types



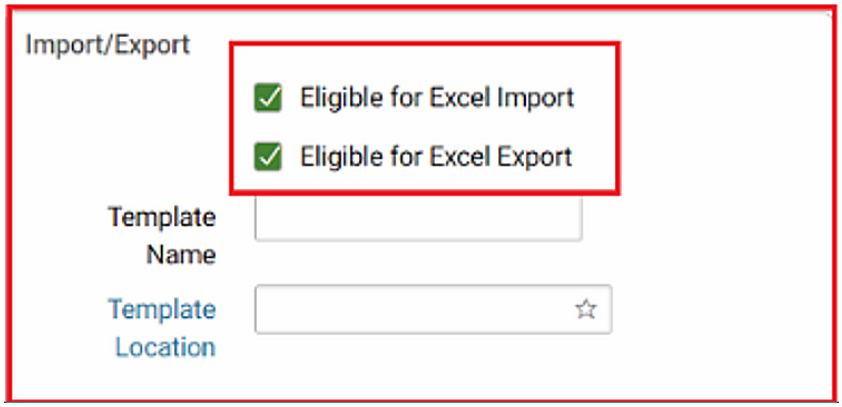
2. Enter the document type in the code field in the search criteria box.
3. Select the document in the item collection.
4. Select [Open].

Figure 2: Searching for Document Type and Opening



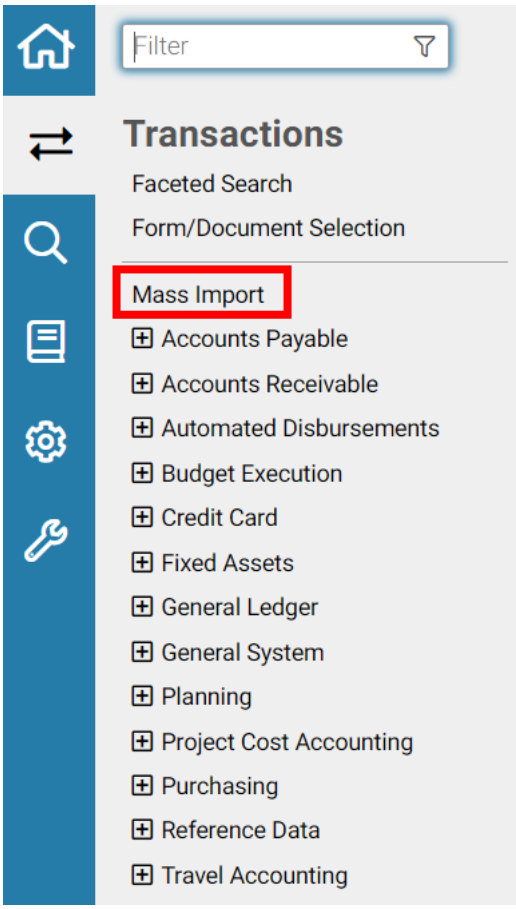
5. Scroll down to the Import/Export section.
6. Verify the "Eligible for Excel Import" flag is enabled. If so, this document type is eligible for Mass Import.

Figure 3: Verifying Eligibility for Mass Import



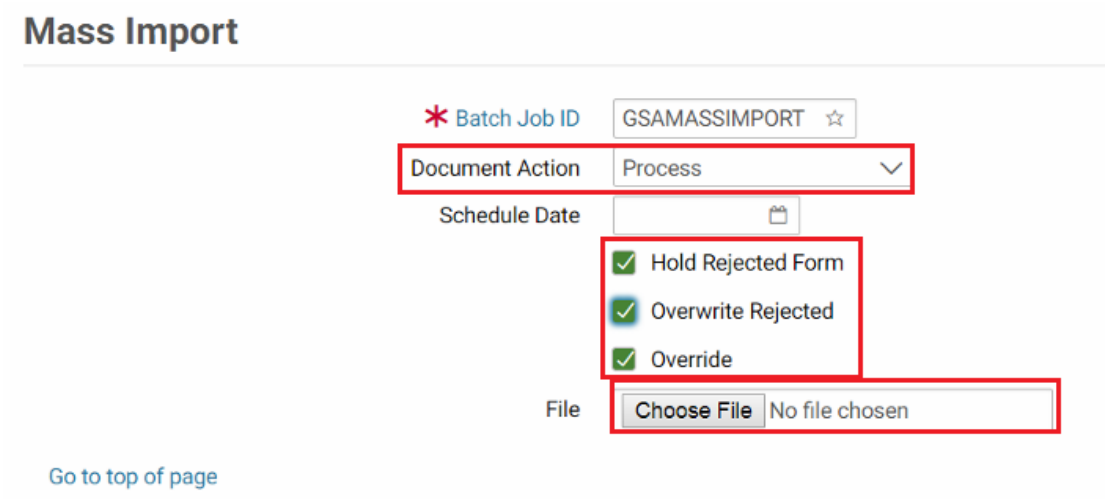
7. Navigate to Transactions > Mass Import.

Figure 4: Navigation to Mass Import



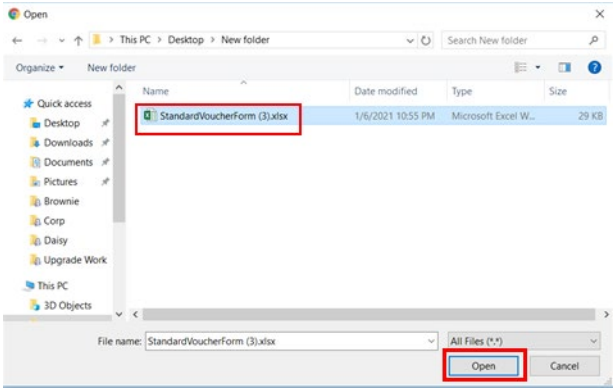
8. Chose the Document Action that you require.
9. Check the “Hold Rejected Form” Box to enable it.
10. Check the “Overwrite Rejected” Box to enable it.
11. Check the “Override” Box to enable it.
12. Select [Choose File] in the file section.

Figure 5: Mass Import Settings



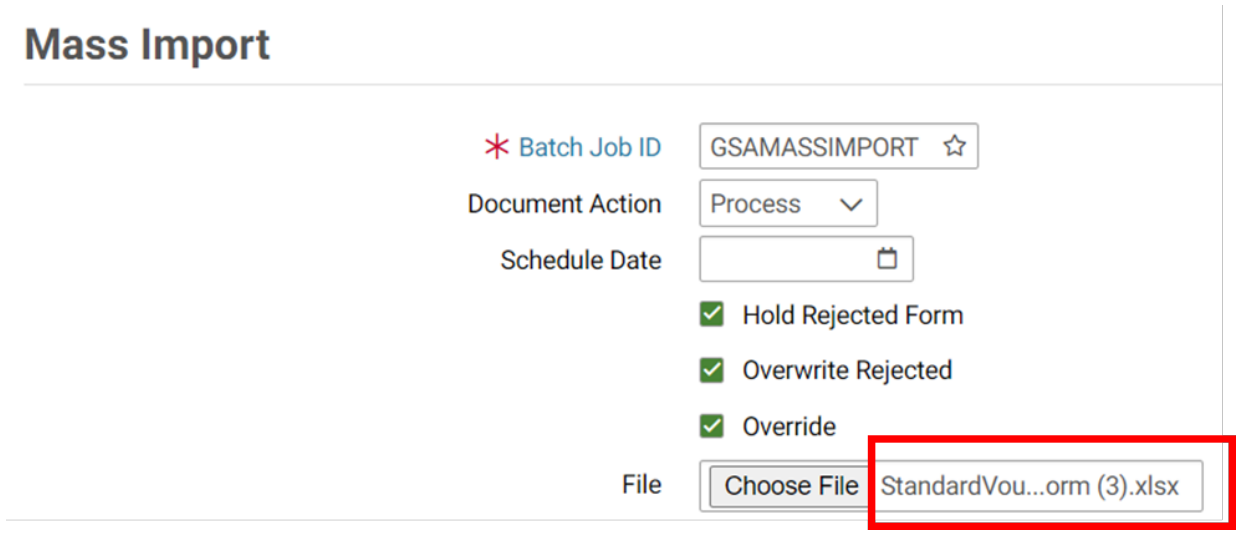
13. In the File Browser window, select the Template Excel file and Select [Open].

Figure 6: Locating Template and Opening



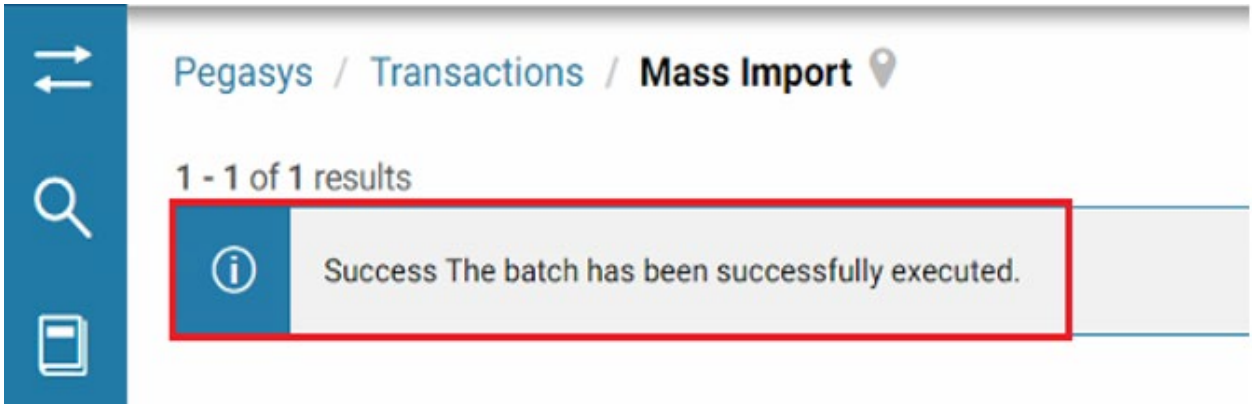
14. Verify that the Excel file name is populated in the File Box.

Figure 7: Updated File Name



15. Select [Upload].
16. Verify message "Success. The batch has been successfully executed." gets returned.

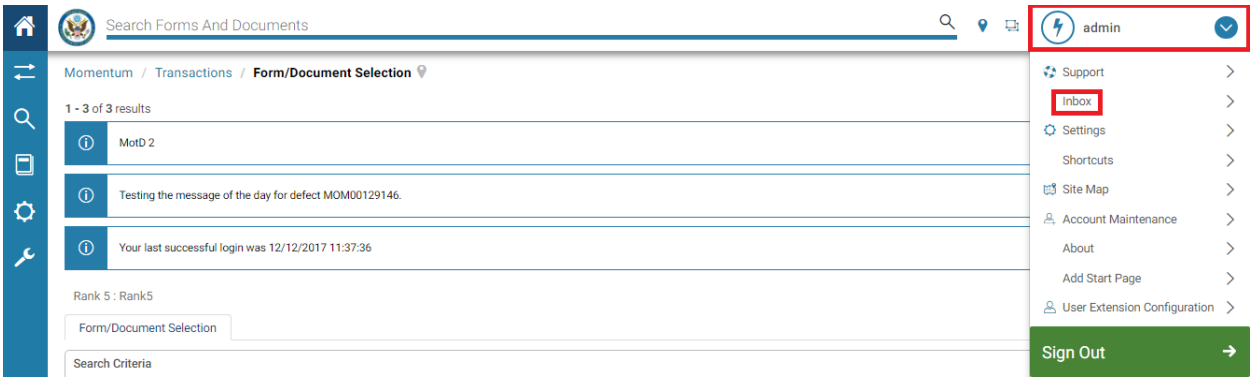
Figure 8: Upload Success Message



Confirming the Batch Job Completion

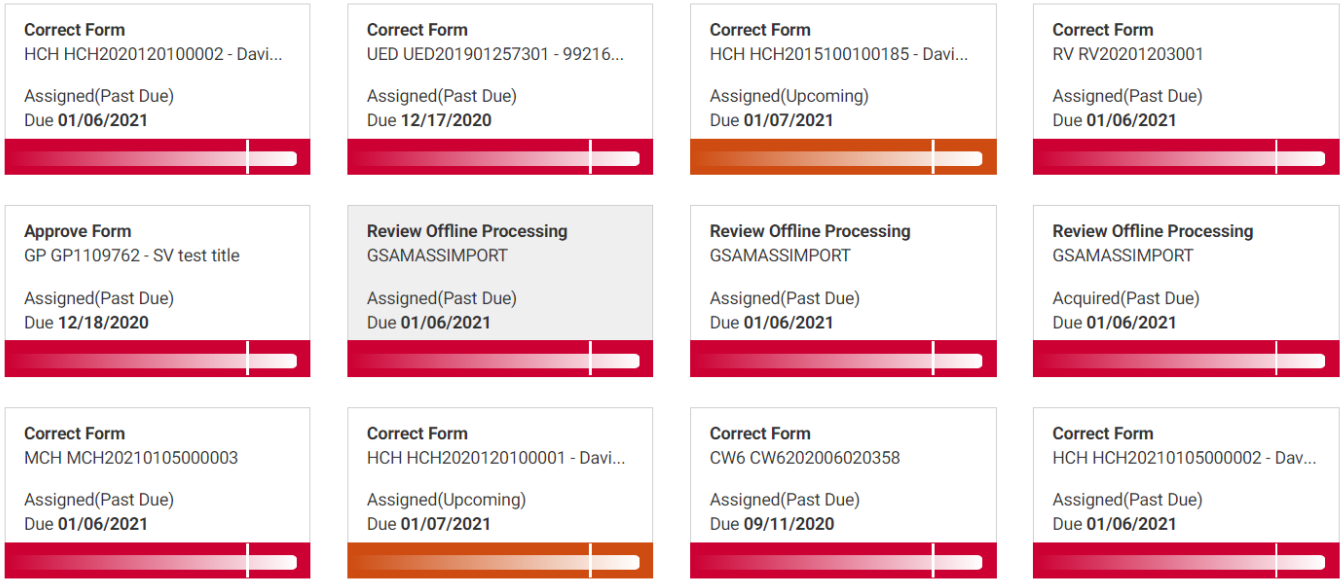
1. Navigate to Pegasys.
2. Select your User ID and then choose the Inbox link from the dropdown box.

Figure 9: Inbox Link



3. Select GSAMASSIMPORT task in the Inbox.

Figure 10: Inbox Tasks

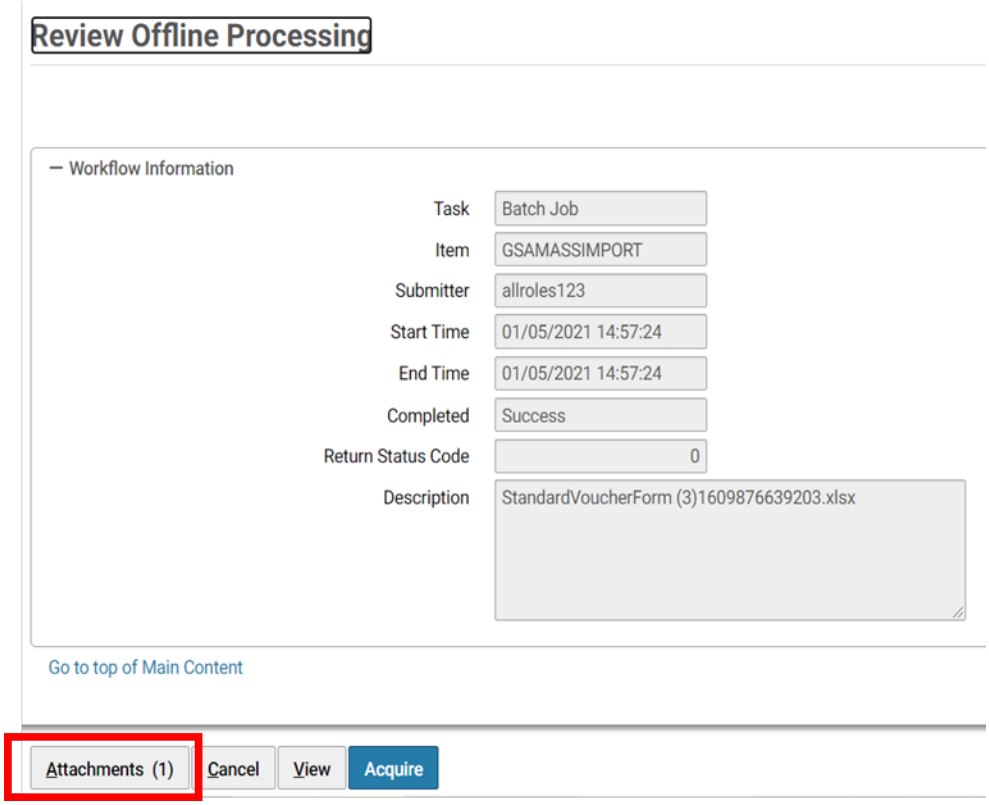


4. After selecting the item, verify general completion information and select [View].

Figure 11: View Button

5. Verify that the Completed field is Success and the Return Status Code is 0 or 8. Select [Attachments].

Figure 12: Review Status Code



6. In the item collection, select the item and then select [View].

Figure 13: View Attachment

7. A new window will open with the batch execution report. Verify the records processed successfully.

Figure 14: Batch Execution Report Successful Message

GSAMASSIMPORT1609876639500.rpt - Notepad

File Edit Format View Help

```
Information:  Batch Job Bulk Load Process started on 01/05/2021 14:57:22.000
Information:  Entered DocumentAction value: HOLD
Information:  Entered UserId value: allroles123Information:  Entered createLoadedFile value: T
Information:  Entered createDeclinedFile value: T
Information:  Entered holdRejectedForm value: T
Information:  Entered overwriteRejected value: T
Information:  Entered overriddenFlag value: T
Information:  Entered overrideJustification value:
Information:  Final DocumentAction value: HOLD
Information:  Final UserId value: allroles123
Information:  Final createLoadedFile value: TRUE
Information:  Final createDeclinedFile value: TRUE
Information:  Final holdRejectedForm value: TRUE
Information:  Final overwriteRejected value: TRUE
Information:  Final overriddenFlag value: TRUE
Information:  Final overrideJustification value:
Information:    : BJ0066I : Begin processing of ET ET20211202000000
Information:    : BJ0139I : Form imported:ET - ET20211202000000
Information:    : BJ0140I : 1/1 import forms read, 0 failed, and 1 successful.
Information:    : BJ1032I : Of the 1 forms read (including failed), the breakdown is as follows:
Information:    : BJ0141I : Number of processed forms: 0
Information:    : BJ0141I : Number of new forms: 1
Information:    : BJ0141I : Number of corrected forms: 0
Information:    : BJ0141I : Number of cancelled forms: 0
Information:    : BJ0141I : Number of amended forms: 0
Information:    : BJ0141I : Number of invalid forms: 0
Information:    : BJ0141I : Number of submitted forms: 0
Information:    : BJ0141I : Number of submit errors forms: 0
Information:    : BJ0028I : Number of Parent Records Read : 1
Information:    : BJ0028I : Number of Child Records Read : 6
Information:    : BJ0028I : Number of Continuation Records Read : 0
Information:    : BJ0028I : Number of Error Records Read : 0
Information:    : BJ0028I : Number of Total Records Read : 7
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