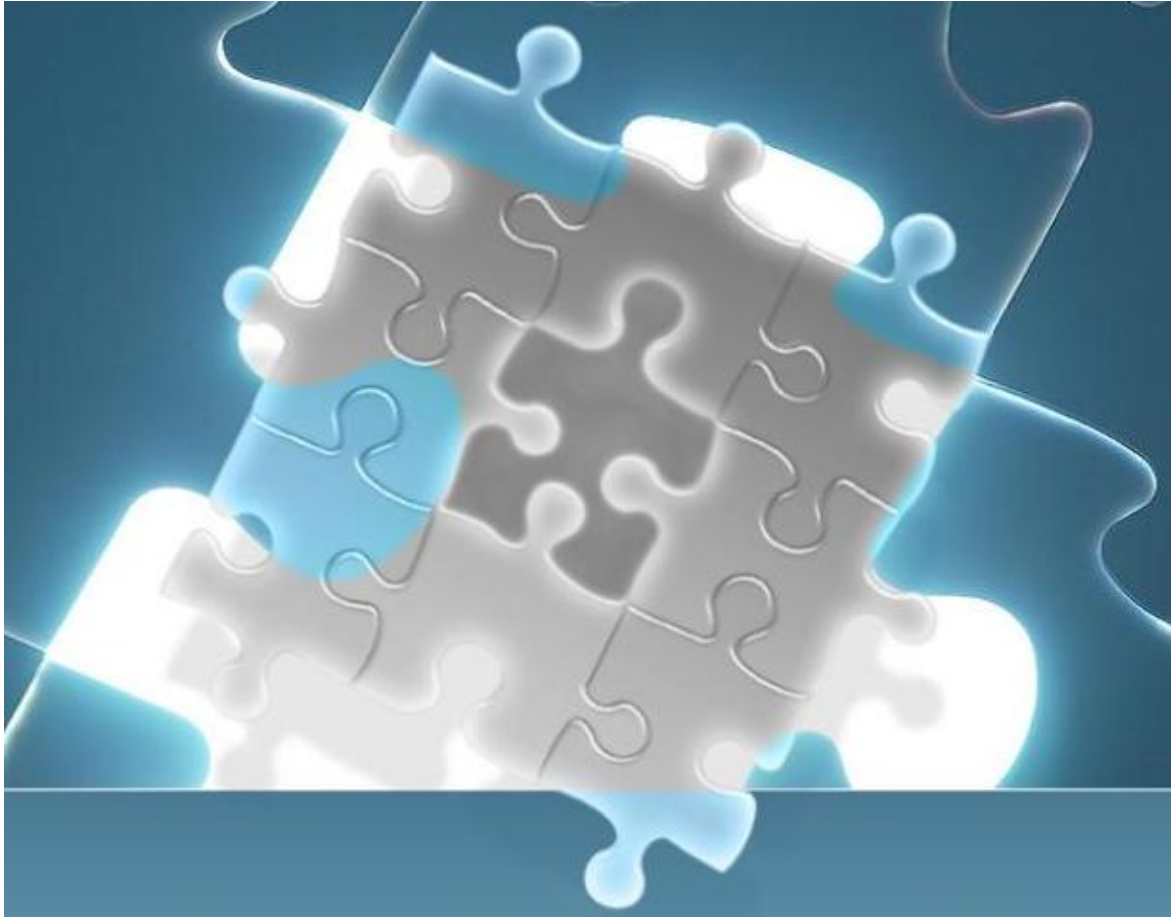# Using the LAM Import Excel Template

Preface:

The LAM Import Excel Template provides an easy and consistent way to enter your data into LAM. It is basically an Excel spreadsheet mapped to the LAM database. It includes redundancy checking so if you have imported the info once, it won't import it again. Redundancy checking looks at the first field in the row, so if it is already in the LAM database, it won't add it again. The only exception to this is for License, wherein it will allow import on multiple Tools of the same name. Before importing via the Import Spreadsheet, you may wish to import the Vendors and Tools already provided in LAM.

Importing Vendors already in LAM

If you go to the Vendors Tab in LAM, click Import you will see:
Import EDA Vendors (Electronic engineering application providers)
Import MDA Vendors (Mechanical engineering application providers)
Import Pharma Vendors (Pharma R&D application providers)
When you click on these, LAM will automatically populate the Major Vendors in each of these categories, along with their Corporate HQ information.

Importing Tools already in LAM

If you go to the Tools Tab in LAM, click Import, you will see:
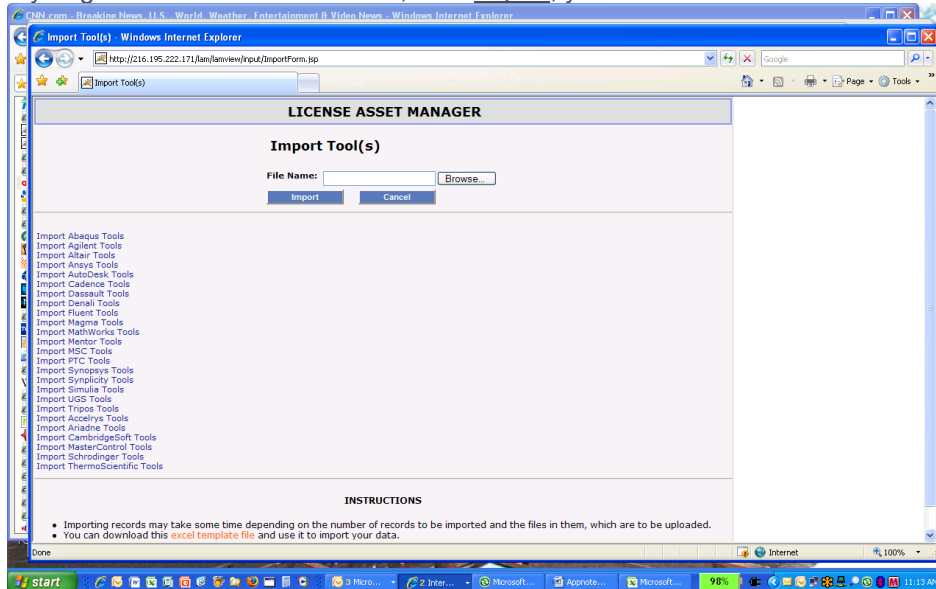
Just click on the Vendors that you use and their Tools (products) will be imported into LAM. If you do not use all of the tools that are imported for a particular vendor, then you can easily "mass delete" Tools you do use or want in the LAM database. Tool "discipline" is what the Tool does, it's purpose. Discipline is provided by you and may be changed as needed.

Accessing the Import Template:

The Import Template may be found on the Log-in page on the left side at:
LAM can import data in excel files. Download the excel file format here.

or on the "Import" page of every Tab view at:
You can download this excel template file and use it to import your data.

Template Spreadsheet layout:

The Template is a standard Excel file, with 8 Worksheet Tabs: Vendors, Tools, Servers, Daemons, PO, Licenses, README, HelpLists. These Worksheet Tabs correspond to the Tabs in LAM. Example: to import Server information, use the Server Worksheet Tab, etc. So If you want to import Vendor info, go to the Vendors Tab in LAM, click Import, Browse to the excel file, and import the Template. It will only import the information in the Vendors Worksheet Tab, etc. Let me say it another way- LAM will only import the equivalent Template Worksheet Tab information. The README and HelpLists are only there to assist in the completion of the template. "Red" fields are mandatory. Everything else is optional.

Note: **DO NOT CHANGE THE IMPORT TEMPLATE STRUCTURE**. You can change font size, size/width of cells/columns/rows, or scale the spreadsheet but do not change Worksheet Tab names, column headings, add or delete columns or worksheets.

Filling in the Worksheet:
When filling in the worksheets, please observe the following general regulation:

- "Red" fields are required and should not be left blank.
- Avoid using special characters for names and mandatory fields which are noted in "Red". Alpha/numeric data only. (No _, . , &, *.,….)
- Date format must be YYYY-MM-DD such as 2016-05-22 or MM-DD-YYYY
- Do not leave blank rows in-between two rows.
- Read the Error Message (Summary of Import) after import and correct any other errors LAM will report.

If the data is in another spreadsheet, copy and paste is the easiest way to get it into the template.

Saving the Template:
Once you have entered data into the Import Spreadsheet, we recommend saving the Import Spreadsheet in **.xls** format, and save to a convenient location that you can easily "browse" to. You may use with any convenient file name, since you will only be browsing to it.

Using the Template:
Here is a brief look at each Worksheet Tab you will be using, and how you will complete it. Items in red are required fields. Each field corresponds with an equivalent data field in LAM. You may enter data manually into the proper cell, or you may copy/paste from some other spreadsheet/document using standard MS Office commands.   Remember: "Red" fields are required for any line item. There should be no blank rows.
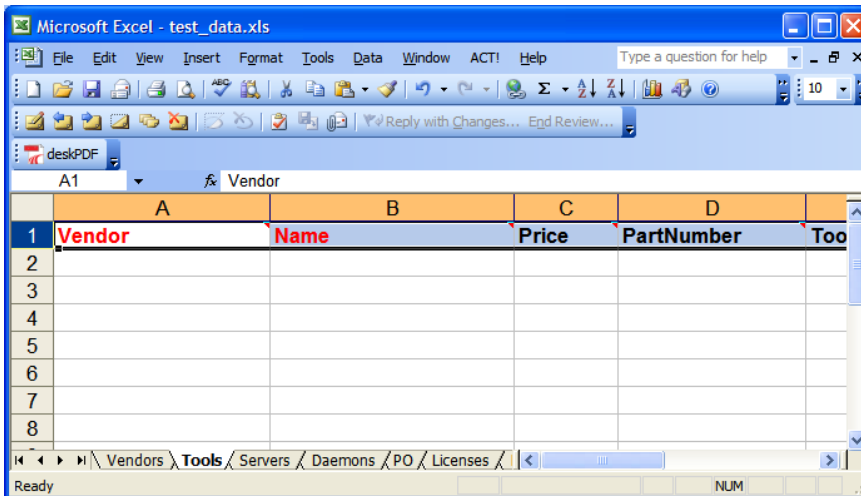
Vendors:
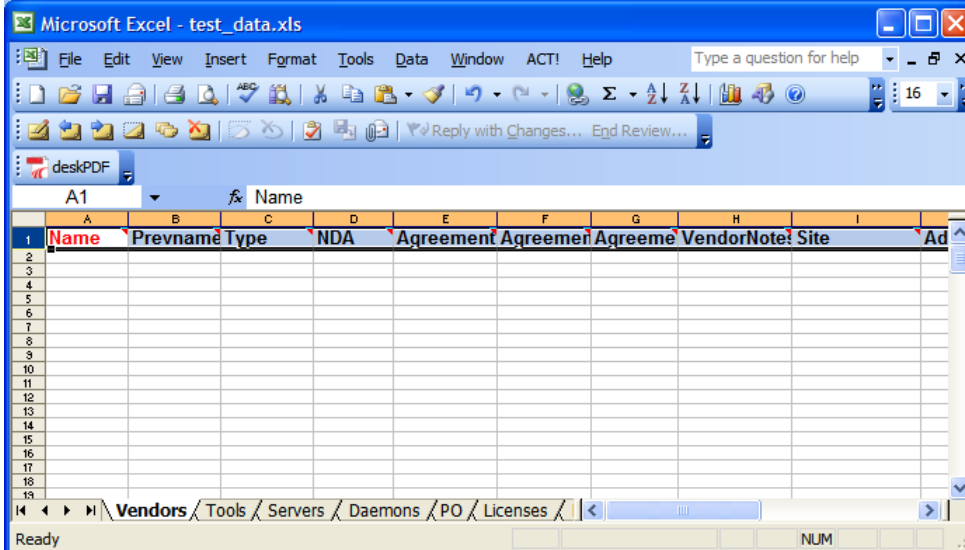
Vendors Worksheet

 I. Name- Any new Vendor or Reseller name. Again, if you have already imported the major Vendors automatically, there in no need to reenter them here.

 II. Prevname- only use this field if you want to include an alias, previous name, or perhaps Parent Company.

 III. Type- Usually Direct or Reseller, but new "Types" can be added under the HelpLists Worksheet.

 IV. NDA/Agreements- if you want to attach these docs, simply include the physical path to the doc on your computer or on your network. LAM will create an icon for the hot-link. A copy is attached in the LAM database.

 V. VendorNotes- used typically to include Corporate Discounts, Special Terms, etc. The field can be used for anything else.

 VI. Site- typically a short version of HQ location. It can be City, State , or anything else you want.

 VII. Address is typically the HQ address

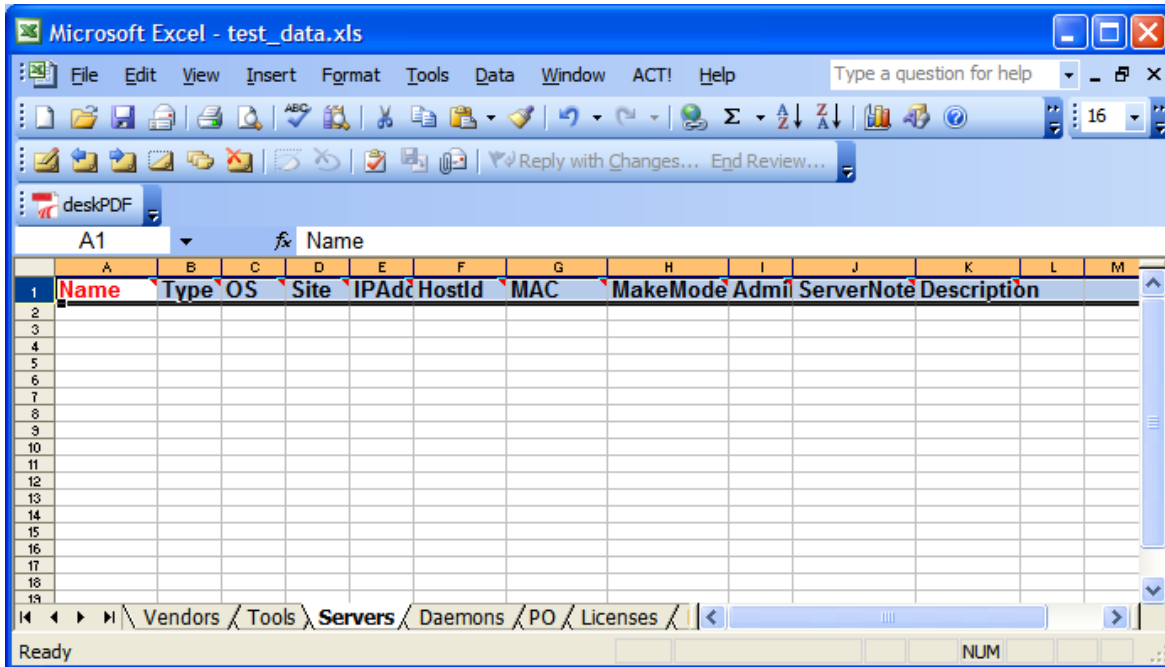 VIII. Other fields may be included- company main phone #, company website, etc. as desired.

Tools:

Tools Worksheet

 I. Vendor- Vendor/Reseller Name. (Note: Vendor name must be in database before importing Tools)

 II. Name-Tool Name. Tools=Products. Products are what you buy from the Vendor. Again Tools for the major Vendors may have been previously imported. If so there is no need to reenter here. Again, redundancy checking will not import these "duplicate" tools (or anything else in the line item). There is an explicit restriction that chars like : , ( ) etc are not allowed in the name of the tool. The Note field or one of the other fields attached to Tool tab may be used.

 III. Price- optional if you want to include their list price or your cost (each) for this Tool.

 IV. PartNumber- optional, if you want to include your internal part number for this Tool.

 V. DisciplineName- optional, if you want to include a discipline for this Tool. A list of disciplines is provided in LAM. It would be important for you to use the same discipline name if already in LAM, i.e. FEA, PCB Layout, etc. To find this list in LAM, go to Tools Tab, select <u>Add New Tool</u>, and look at the Discipline drop-down list.

Servers:

Servers Worksheet

I. Name- Server name, sometimes called Host name, is usually one word, and referenced in the license files. IT should know this name.

II. Type- optional, if you want to refer to it as FLEX, or WAN, or whatever you want to describe this server "type"

III. OS- optional, if you want to state the OS on the server, i.e. Linux, RHEL, Solaris, WS2003, etc.

IV. Site- optional, if you want to state where the server is located. This is usually a City, State, or whatever else you want to use to define the "site".

V. IPaddr, HostID, MAC, MakeModel- optional fields if you want to track this information for this server. (useful for IT)

VI. Admin- optional, if you want to identify the IT SysAdmin for the server. However, this name must already be listed as a User in the Setting Tab of LAM. If not, add them in LAM under Add New User

VII. Other fields are not mandatory but may be useful for server notes, etc.

Daemons:

Daemons Worksheet (Note: if it is a FLEXlm daemon, it is easier to import the daemon and port information using the FLEX License Parser in LAM)

    I.   Daemon- name of daemon
   II. Vendor- Vendor for this daemon. Vendor name must already be in LAM.
  III. Server- Server where daemon is located. Server name must already be in LAM.
 IV. Port- port number location of daemon on this server.
   V. Group- used if "triad" of servers

POs:

PO Worksheet

    I.   PONum- Should be unique number for the Vendor given.
   II.   Vendor- Vendor name. Again, this Vendor name must already be in the LAM database.
  III. POFile and QuoteFile- define the physical path to the doc on your computer or on your network to have a electronic hard copy of these documents in LAM. Quote doc could also be REQ doc.
 IV.   Date- date of PO
  V.   PurchaseNotes- this is typically used to document the "deal", discounts, special concessions, etc. for this PO. This provides a history of negotiations and concessions provided by this Vendor, and is useful to reference before starting new negotiations.
 VI.   ChargeDept- optional, if you want to associate the PO with a particular Dept or Project, who may have funded this purchase. There may already be a list of ChargeCenters in LAM and if so, be sure to use the same ChargeCenter name/number. To find out, go the PO Tab in LAM, click Add New PO, look at the Charge Center drop-down list.

Licenses:

Licenses Worksheet

I. Tool- The Tool name, which must already be in the LAM database. Again, Tool = Product. Products are what you buy from the Vendors. Features on the License Key enable the Tool. Here we are asking for the Product name. Tools from major Vendors can be easily imported from the Tools Tab <u>Import</u> utility. Just click on the Vendor and their list of Tools will be imported.

II. Type- usually Normal (production), Spare, Temp. Select from drop-down, or type in whatever you want.

III. PO- you may enter the PO # used to purchase this Tool. PO # must already be in LAM.

IV. PurchaseType- usually Subscription, Purchase w/o Maint., Purchase w/Maint., Maintenance. Select from drop-down, or type in whatever you want.

V. Daemon- You may enter the daemon used for this Tool. Again this daemon must already be in LAM. You may also import the daemon name from a FLEX License key for this License.

VI. Server- You may enter the server used for this daemon. Again this server must already be in LAM. You may also import the Server name from a FLEX License key for this License.

VII. Port- You may enter the port # used for this daemon. You may also import the port # from a FLEX License key for this License

VIII. Installer- Name of person responsible for installing this License. This person must already be in the LAM database.

IX. ResponsibleEngineer- Name of person responsible for supporting or using this License. This person must already be in the LAM database.

X. LicenseLoc- URL or logical path to license file

XI. Date Acquired- typically the date of PO but you can put whatever date you want.

XII. Quantity- the number of licenses you purchased, i.e. the number of seats, the number of users allowed to use the tool simultaneously.

XIII. Version- version of the application. This could be "approved production version" or current installed version.

XIV. Restriction- For shared/concurrent use Licenses. Usually LAN, WAN, …. Select from drop-down, or type in whatever you want.

XV. StandAloneType- this is for node-locked or user-locked licenses only. Select from drop-down, or type in whatever you want.

XVI. HostorUser- this is for node-locked or user-locked licenses only. You may enter the Host ID for node-locked, or User name for user-locked Licenses.

XVII. HardwareKey- usally the serial # of a mounted security device (dongle)

XVIII. MakeModel, OS- optional information about node-locked Licenses

XIX. ExpiryDate- usually the expiration of the license key, maintenance period, or subscription contract end date. This field is used to trigger Email Alerts.

XX. Capital and Expense- Cost of the Licenses. Capital $ is usually for Perpetual Licenses. Expense $ are usually for Subscriptions and Maintenance.

XXI. Licenseno- if you have/want to record the License key/file #.

Note about FLEX licenses: LAM has the ability to import server, daemon, port, features, feature quantity, feature version, feature expiration, directly from the FLEX license file. To use this, first enter the License (Tool) in LAM. Open the License Detail and Edit. Under the "Networked" license category, browse to the location of the License file or define the port@host. Submit. This will create an icon for "Licensefile". Next click on the Parsed Data hot-link. This will read and parse the FLEX license file. If the server, daemon, port do not already exist in the LAM database, the Parser will ask if you want to import them. Just click yes. Then a page showing all the features, quantity, expiration, versions, with a "check box" next to each line item, will appear. Just check off the features you want to track in LAM under this License. They will automatically be imported into LAM under this License.

Note regarding daemons in LAM: daemons will be seen in the Servers Detail View by Server, i.e. any daemons for the Server will be listed. Daemons are also referenced in the License Detail View, in the Edit License mode, under Networked Licenses, when you select "Daemons", you will see a drop-down list of "daemon@server".

Data prerequisites and formats:

Please note that some data in the template requires other data to be present. Below are lists of data that must be in either LAM or in the corresponding tab in the import spreadsheet. For example, in order to enter in a Tool, you need to have the Vendor already in LAM or in Vendor Tab in the import spreadsheet.

Tab	Required Corresponding Data
Vendors	*None Required*
Tools	*Vendor*
POs	*Vendor*
Servers	*None Required*
Daemons	*Server, Vendor*
Licenses	*Tool*

In addition to the above, each tab has required information that needs to be entered in about the specific item being entered. Below is a table detailing what is required. In addition, the import template marks required fields in red.

Tab	Required Information
Vendors	*Name of Vendor*
Tools	*Name of Tool, Corresponding Vendor*
POs	*PO Number, Corresponding Vendor*

Servers	*Name of Server*
Daemons	*Name of Daemon, Corresponding Vendor, name of Server, and Port Number*
Licenses	*Corresponding Tool, Date Acquired, Quantity, Expiry Date*

Date formats and import "Sequence"

- When entering in a date, please put it into the MM/DD/YYYY format.
- When importing the data into LAM, please make sure to import the tabs in the correct order: Vendors, Tools, POs Licenses, Servers, Daemons.

Import Summary Report

After you browse to the Import Spreadsheet and click "Import", LAM will read in the data and provide a report, showing results:

Error Messages: usually shows line item by line item failed imports, most often a result of the item already being in the database already, or improper characters/nomenclature, .
Warning Messages: further details on import failures
Info Messages: typically the number of line items successfully imported, such as:
Total Number of Rows Successfully inserted : 29

For more information, contact TeamEDA at 603-656-5200, or support@teameda.com