ETO TARGETED WEBINAR

Troubleshooting Batch Upload Webinar

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Meet Your Trainer

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Learning Objective

This session will review tips and tricks for troubleshooting the Batch Upload tool within ETO.

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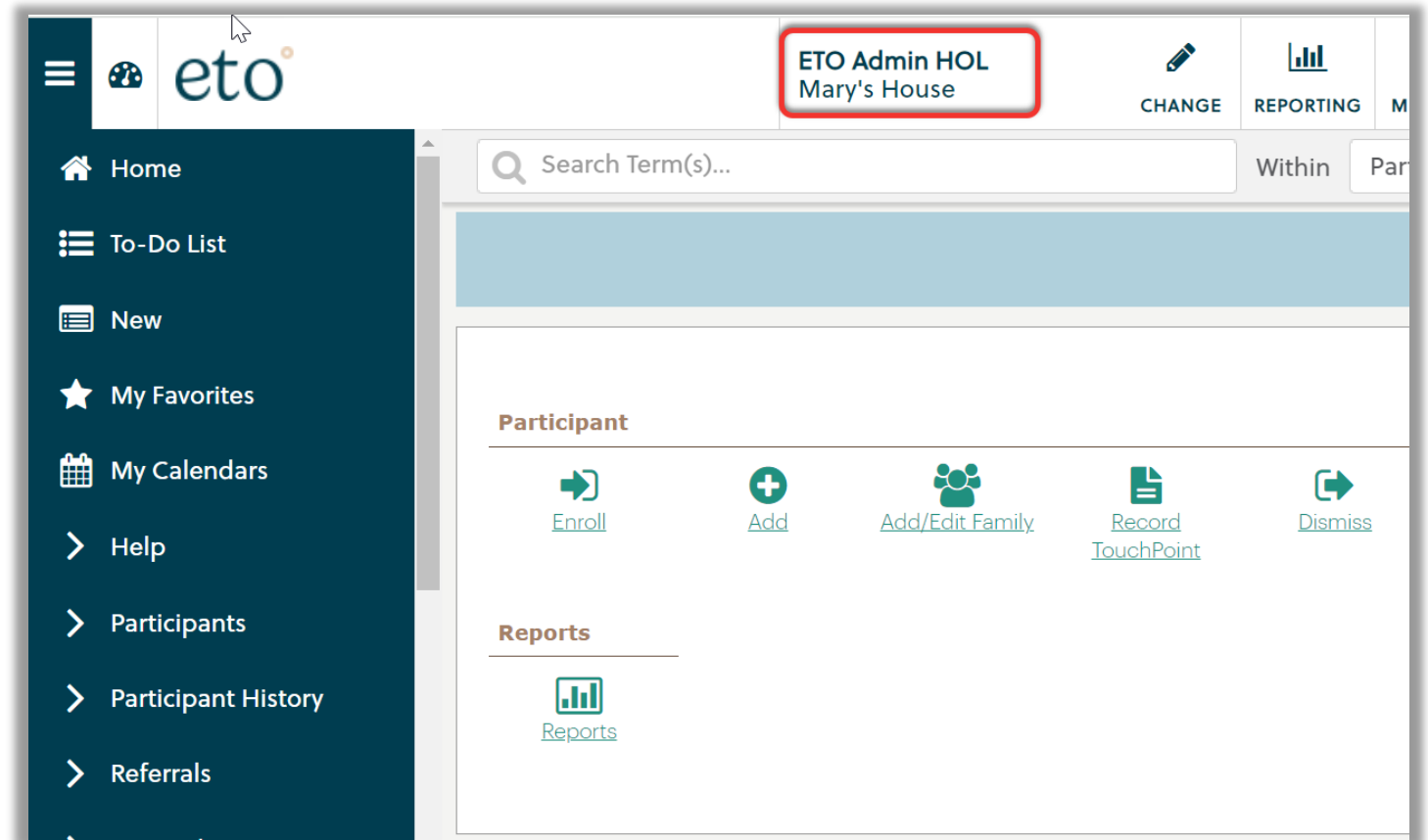
Agenda

Special Characters

Numbers that Start with 0

Incompatible Fields

Batch Upload Summary

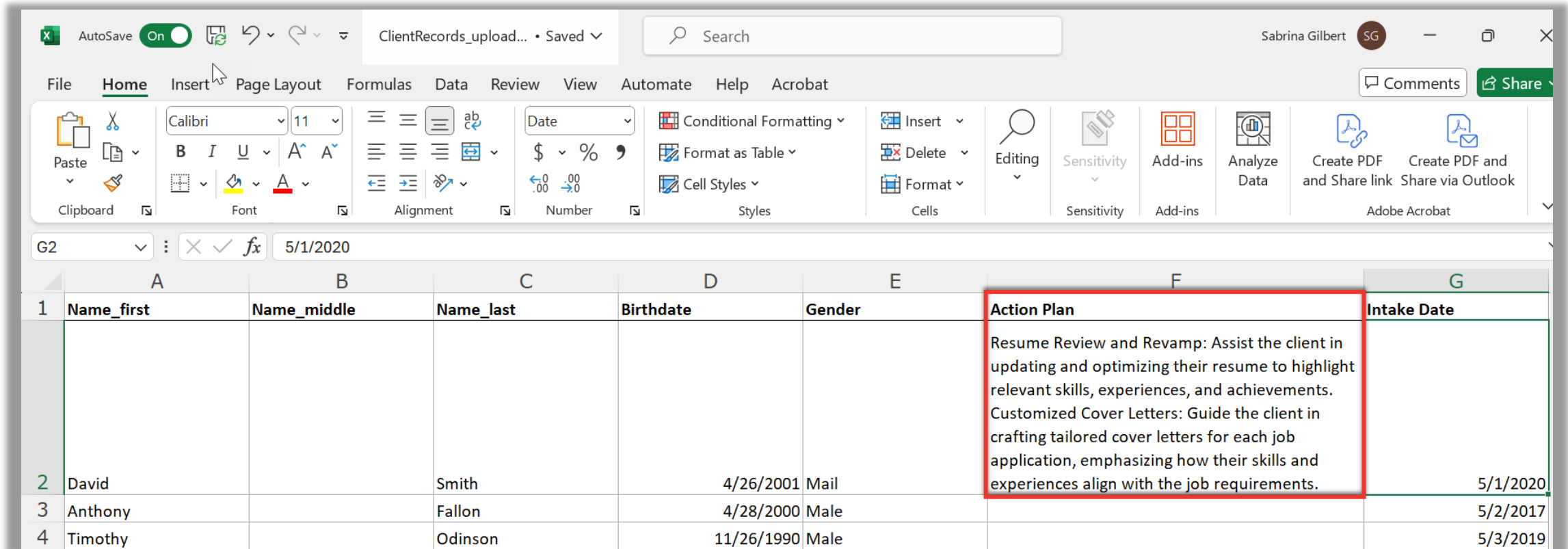**Bonterra**™

Special Characters

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Special Characters

- Read as commands in software

- Avoid in Program and Site Names

- Update the program /site name before batch upload.

Special Characters

- Line Breaks create errors

- Error in Template, Upload right Template

- Avoid hitting Enter Key within cells

Numbers that Start with 0

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Numbers that Start with 0

- Excel removes the 0
- Add an apostrophe to the front

Incompatible Fields

Incompatible Fields

- Signature Fields

- **Updating** Cross Reference Fields*

Batch Upload Summary

Batch Upload Summary

- Records Received

- Records Not Accepted

- Summary of Action & Exceptions

Take Action	File Name	Batch Upload Type	Received	Accepted	Not Inserted	Date Uploaded ▼	Staff
Original File Uploaded File	Batch Upload 5 12 20 19c7ae6faf244acbad14d5d5f53e6051 20200512 163948	Participant	7	7	0	Tue May 12 2020 16:39:49 GMT-0400 (Eastern Daylight Time)	HOL
Original File Uploaded File	touchpoint batch upload - CT 370a277b32f442168a66c6f10a84e8c6 20180305 183707	TouchPoint_Responses	5	5	0	Mon Mar 05 2018 18:37:07 GMT-0500 (Eastern Standard Time)	HOL
Original File Uploaded File	touchpoint batch upload - CT bfc9d50c67be4f26a2501f8175e08f65 20180305 183100	TouchPoint_Responses	5	0	5	Mon Mar 05 2018 18:31:00 GMT-0500 (Eastern Standard Time)	HOL

Complete | In Progress | Error

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Batch Upload Summary

- Gives you direct insights to issue

- Can correct the issue in the file or software

- Gives support insights for next steps

File Row	ActionTaken
1	Subject with ID of 2884 is not enrolled in the program Program 1, or a program with that name could not be found.
2	Subject with ID of 2885 is not enrolled in the program Program 1, or a program with that name could not be found.
3	Subject with ID of 2886 is not enrolled in the program Program 1, or a program with that name could not be found.
4	Subject with ID of 2887 is not enrolled in the program Program 1, or a program with that name could not be found.
5	Subject with ID of 2888 is not enrolled in the program Program 1, or a program with that name could not be found.

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Additional Resources

Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)

- [Bonterra Academy](#) – Free Webinars & Recordings

- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics

- [Admin Labs](#) – 2 Hour Live Trainings on Specific Capabilities

Build confidence & knowledge in our software!

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Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email: eto@bonterratech.com

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Q & A

- Ask questions about functionality covered in this training

- Ask trainer to redo a demo

- Ask real-life application questions

- Or sign off and we will see you in the next training!

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Thank you for attending!

We hope to see you
in future trainings.

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