

ETO TARGETED WEBINAR

# Troubleshooting Batch Upload Webinar



# Meet Your Trainer

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# Learning Objective

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

# Agenda

Special Characters

Numbers that Start with 0

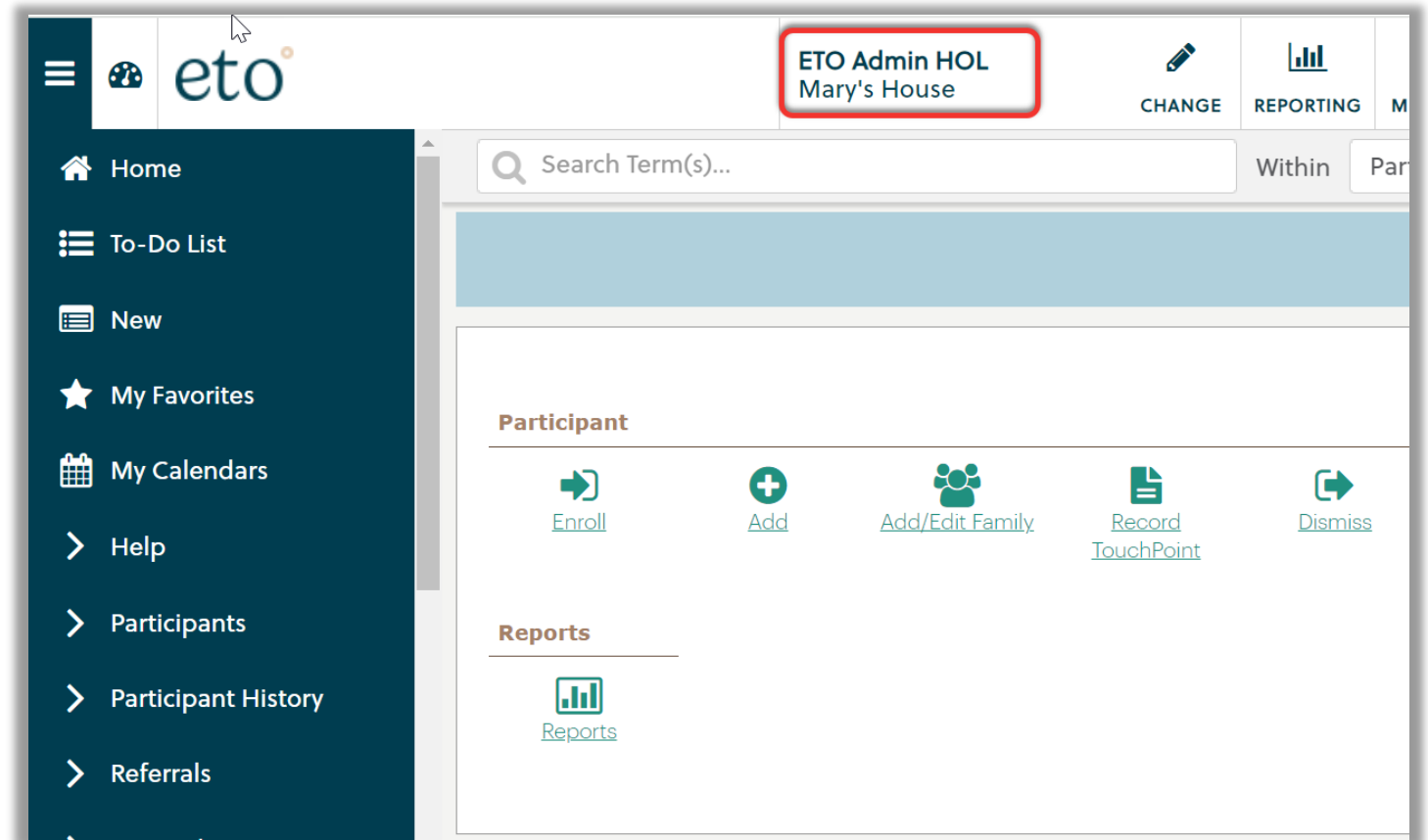
Incompatible Fields

Batch Upload Summary

# Special Characters

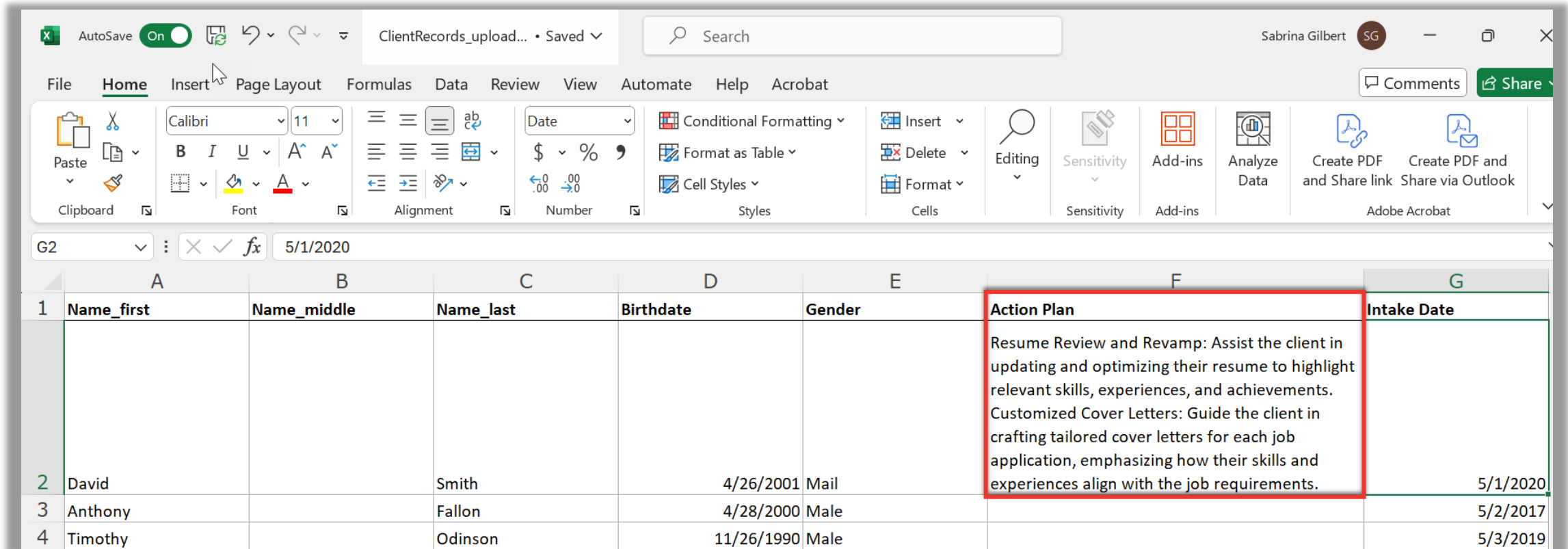
# Special Characters

- 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



The screenshot shows the Microsoft Excel interface with the following data table:

	A	B	C	D	E	F	G
1	Name_first	Name_middle	Name_last	Birthdate	Gender	Action Plan	Intake Date
2	David		Smith	4/26/2001	Mail	Resume Review and Revamp: Assist the client in updating and optimizing their resume to highlight relevant skills, experiences, and achievements. Customized Cover Letters: Guide the client in crafting tailored cover letters for each job application, emphasizing how their skills and experiences align with the job requirements.	5/1/2020
3	Anthony		Fallon	4/28/2000	Male		5/2/2017
4	Timothy		Odinson	11/26/1990	Male		5/3/2019

# Numbers that Start with 0



# Numbers that Start with 0

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

The screenshot shows the Microsoft Excel interface. The ribbon is set to 'Home'. The formula bar at the top shows the text '=082726263' with a red box around the apostrophe and the number. Below the formula bar, a table is visible with the following data:


	A	B	C	D	E	F	G
1	Name_first	Name_middle	Name_last	Birthdate	Social Security Number	Gender	Intake Date
2	David		Smith	4/26/2001	082726263	Mail	5/1/2020
3	Anthony		Fallon	4/28/2000	224948384	Male	5/2/2017
4	Timothy		Odinson	11/26/1990	224847465	Male	5/3/2019
5	Clint		Barton	6/26/2006		Male	5/4/2019

# Incompatible Fields


# Incompatible Fields

- Signature Fields
- **Updating** Cross Reference Fields\*

Goal Target Completion Date



Goal Status



Follow up should be **weekly during the first 60 days of enrollment** then Bi weekly there after.

Date of Follow Up \*

**Schedule Follow-up Alert** to show up on your To-Do list

**Schedule Follow-up Alert** to show up on Other Staff's To-Do list

By signing below I assume responsibility of the necessary actions I must take outlined in the above 'Objectives' field and understand that I alone am responsible for achieving my goals.

Signature: \_\_\_\_\_  
Batten, Jasmine

# Batch Upload Summary

# Batch Upload Summary

- Records Received
- Records Not Accepted
- Summary of Action & Exceptions

Complete In Progress Error								
Take Action	File Name	Batch Upload Type	Received	Accepted	<u>Not Inserted</u>	Date Uploaded	Staff	
<a href="#">Original File Uploaded File</a>	<a href="#">Batch Upload 5 12 20 19c7ae6faf244acbad14d5d5f53e605120200512 163948</a>	Participant	7	7	0	Tue May 12 2020 16:39:49 GMT-0400 (Eastern Daylight Time)	HOL	
<a href="#">Original File Uploaded File</a>	<a href="#">touchpoint batch upload - CT 370a277b32f442168a66c6f10a84e8c620180305 183707</a>	TouchPoint_Responses	5	5	0	Mon Mar 05 2018 18:37:07 GMT-0500 (Eastern Standard Time)	HOL	
<a href="#">Original File Uploaded File</a>	<a href="#">touchpoint batch upload - CT bfc9d50c67be4f26a2501f8175e08f6520180305 183100</a>	TouchPoint_Responses	5	0	5	Mon Mar 05 2018 18:31:00 GMT-0500 (Eastern Standard Time)	HOL	

# 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.

# 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!



# 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](mailto:eto@bonterratech.com)

# 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!



Thank you for attending!

We hope to see you  
in future trainings.