ReliaEn 1.0.0 User Manual · Chapter 6.9

Import wizard — work orders from another system, checked before anything is stored

Menu: CMMS ▸ Import Wizard…

Part 1 — What the function does

What it does. The Import Wizard brings work orders from another maintenance system into a ReliaEn CMMS file. You export them from that system as a CSV file: one row per work order, a header row with the column names. With the tab Import (CSV) you

Action	What ReliaEn does
Choose a template in Template / source	Takes its saved column map: which column of the export holds the asset tag, the type, the description, the priority and the request date. ReliaEn ships sap_iw38 and maximo_wo and three others, each marked (unverified against a live export)
1 · Choose CSV…	Reads the file and fills the column map from the template
Change a Target field	Maps a column of your file to a work-order detail, or leaves it (not mapped)
3 · Validate	Runs every row through the same checks as a work order typed by hand and lists each row it would refuse. Nothing is stored
Commit	Stores the accepted rows as new work orders in status Draft, numbered in the file's own sequence, as one import job

From what data. The CSV file and the open CMMS file: an asset tag must belong to an asset in that file. asset_tag and wo_type must be mapped; without them the import stops at once, with Import stopped: required column "asset_tag" is not mapped. (the column named).

When an engineer uses it. To load a backlog or a work-order history from SAP, Maximo or a spreadsheet once, for example when starting with ReliaEn's CMMS.

Do not use it when

Situation	Use instead
You want to stay in step with SAP or Maximo again and again, with assets, failures, preventive plans and spares too	CMMS ▸ Bridge… (chapter 6.15)
You want to take work orders out of ReliaEn	CMMS ▸ Export… (chapter 6.10)
You want to import failure times for an analysis	File ▸ Import Data (Excel / CSV / JSON)…

Part 2 — The example's input data

Setting. A small plant holds the pump PUMP-101 and no work orders. The first example brings in three open orders exported from SAP. The second brings in the planner's own spreadsheet of 20 rows, whose row 7 names an asset GHOST-1 that does not exist and whose row 13 has the type XX. Each example starts from a fresh copy of the plant file.

The first file, sap_iw38.csv:

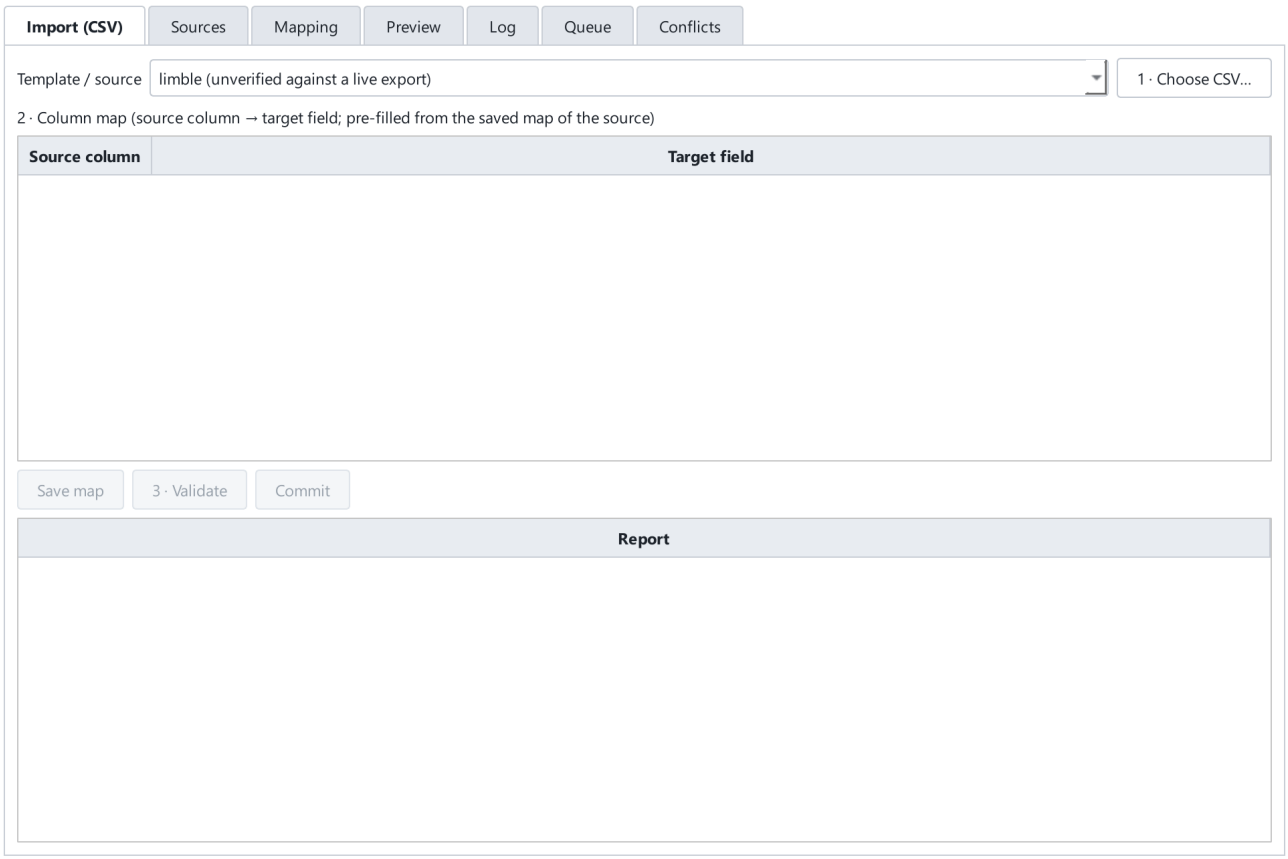
Order	Order Type	Equipment	Description	Priority	Bsc start date
4000123	CM	PUMP-101	Seal replacement	high	2026-08-02
4000124	PM	PUMP-101	Quarterly service	normal	2026-08-03
4000125	CM	PUMP-101	Bearing noise	high	2026-08-04

The second file, generic_wo.csv, has the columns Asset Tag, Type, Description, Priority and Requested. Its rows run from 2026-08-02 to 2026-08-21, one a day. Its map:

Source column	Target field
Asset Tag	asset_tag
Type	wo_type
Description	description
Priority	priority
Requested	requested_at

Files in the worked-example zip	6-Import-Wizard/ReliaEn-Import-Plant.reliaen, sap_iw38.csv, generic_wo.csv

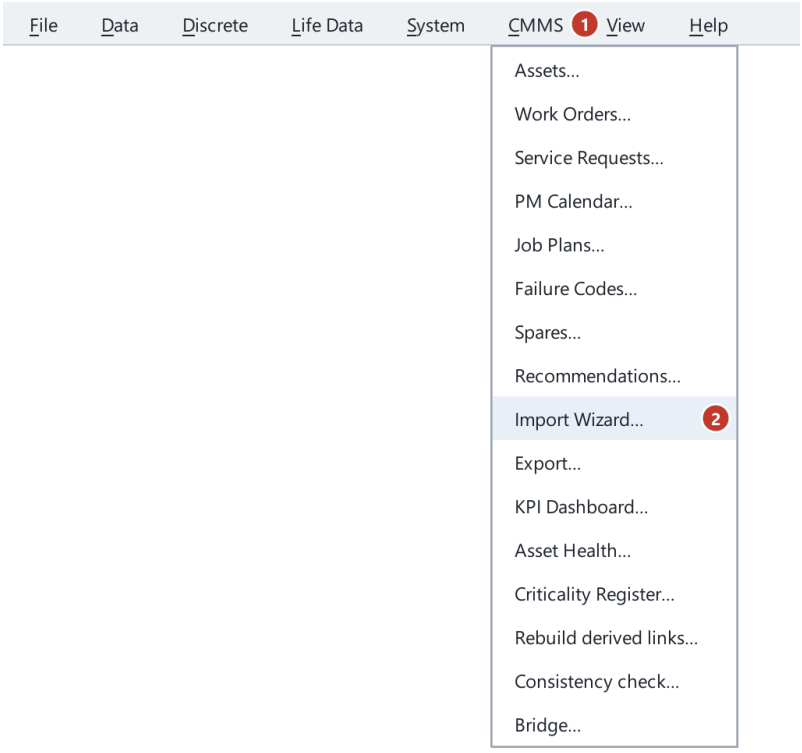
The window as it opens, on the tab Import (CSV). The other tabs belong to the Bridge (chapter 6.15):



The window as it opens

Part 3 — How to use it, step by step

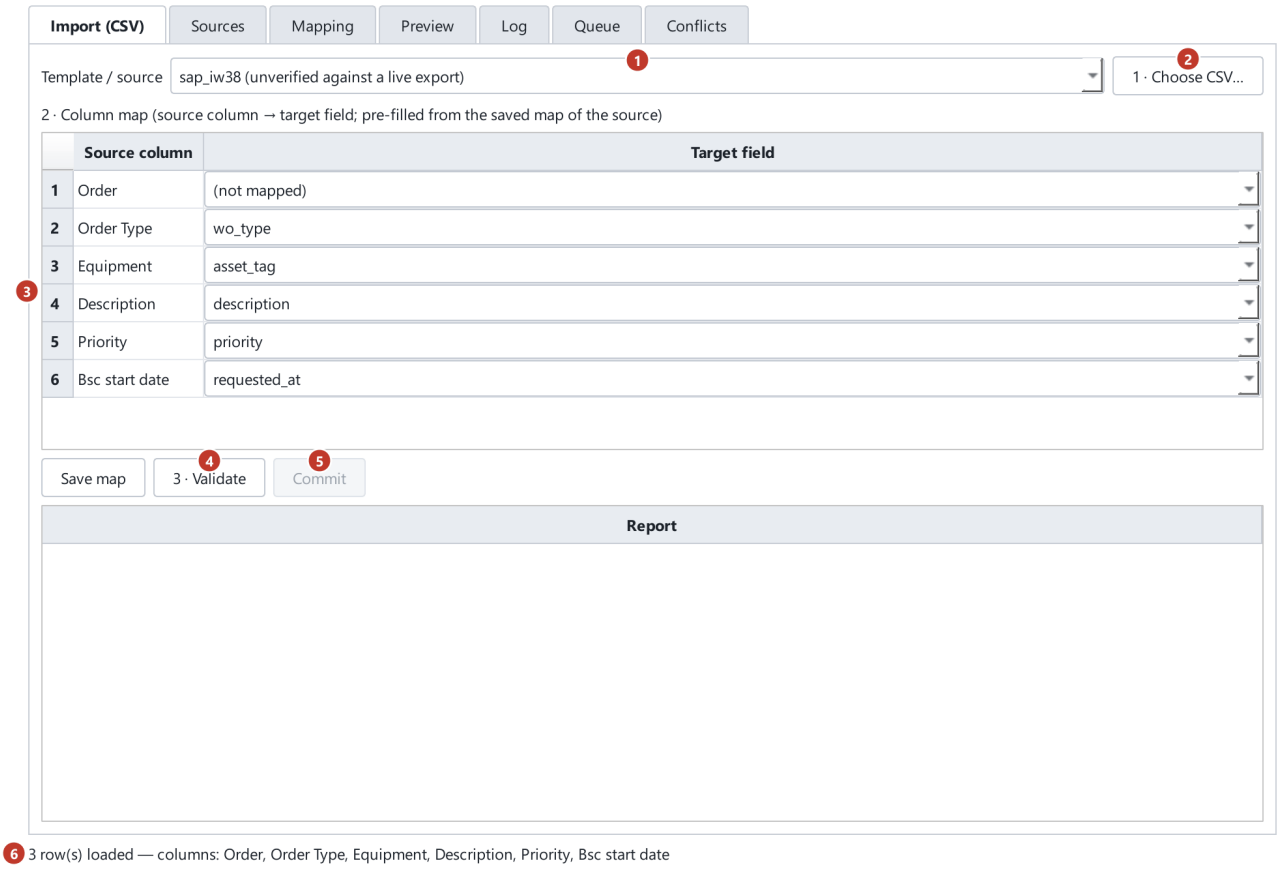
1. **Open the plant file, then choose CMMS ▸ Import Wizard…** in the menu bar. The window CMMS — Import Wizard opens.



Step 1 — the menu path

- ① CMMS: the menu.
- ② Import Wizard…: the entry to click.

2. **Import the SAP list**, as steps 3 to 8 do:

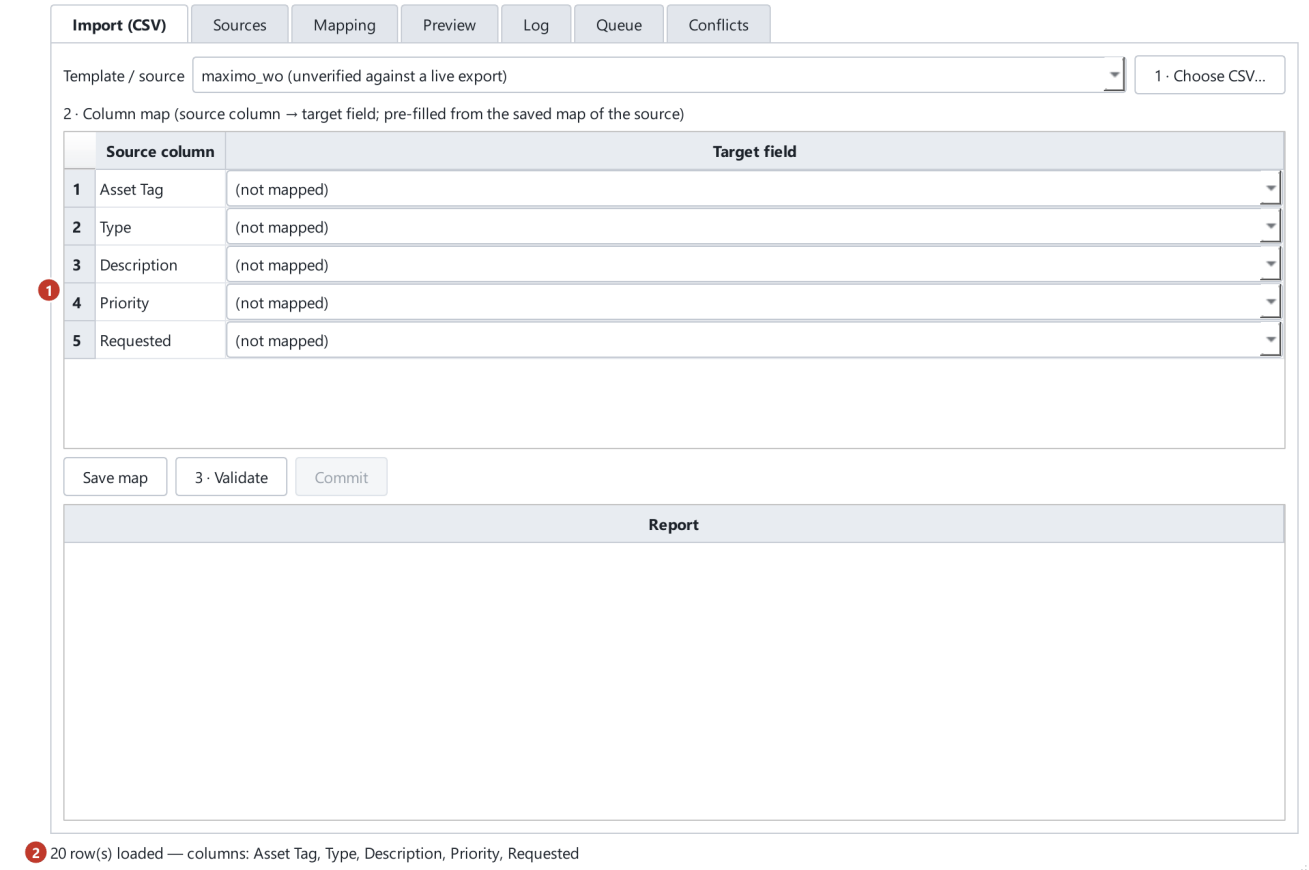


Steps 3 to 8 — the SAP file chosen

- ① Template / source.
- ② 1 · Choose CSV….
- ③ The column map.
- ④ 3 · Validate.
- ⑤ Commit, available after a validation.
- ⑥ The foot line.

3. ① **In Template / source, choose sap_iw38.**
4. ② **Click 1 · Choose CSV… and pick sap_iw38.csv** in the box Import CSV.
5. ⑥ **Check that the foot line reads 3 row(s) loaded — columns: Order, Order Type, Equipment, Description, Priority, Bsc start date.**
6. ③ **Check the map.** Five columns are mapped; Order shows (not mapped), as the SAP number is not stored.
7. ④ **Click 3 · Validate.**
8. ⑤ **Click Commit.**

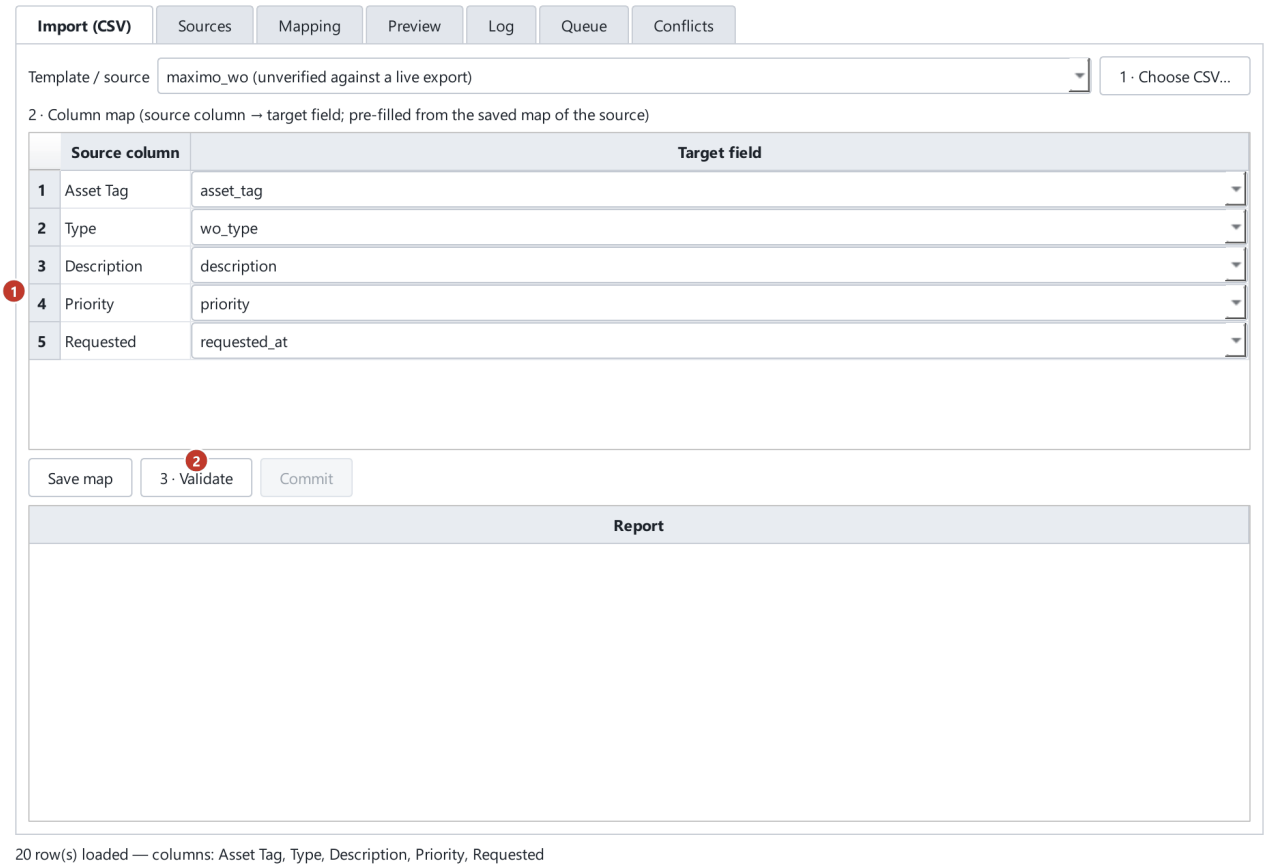
9. **Open a fresh copy of the plant file and the window again. Choose maximo_wo in Template / source and pick generic_wo.csv.** The Maximo map knows none of the planner's column names, so every row shows (not mapped):



Step 9 — the planner's file chosen

- ① The column map, nothing mapped.
- ② The foot line: 20 row(s) loaded — columns: Asset Tag, Type, Description, Priority, Requested.

10. **Set the map and validate**, as steps 11 and 12 do:

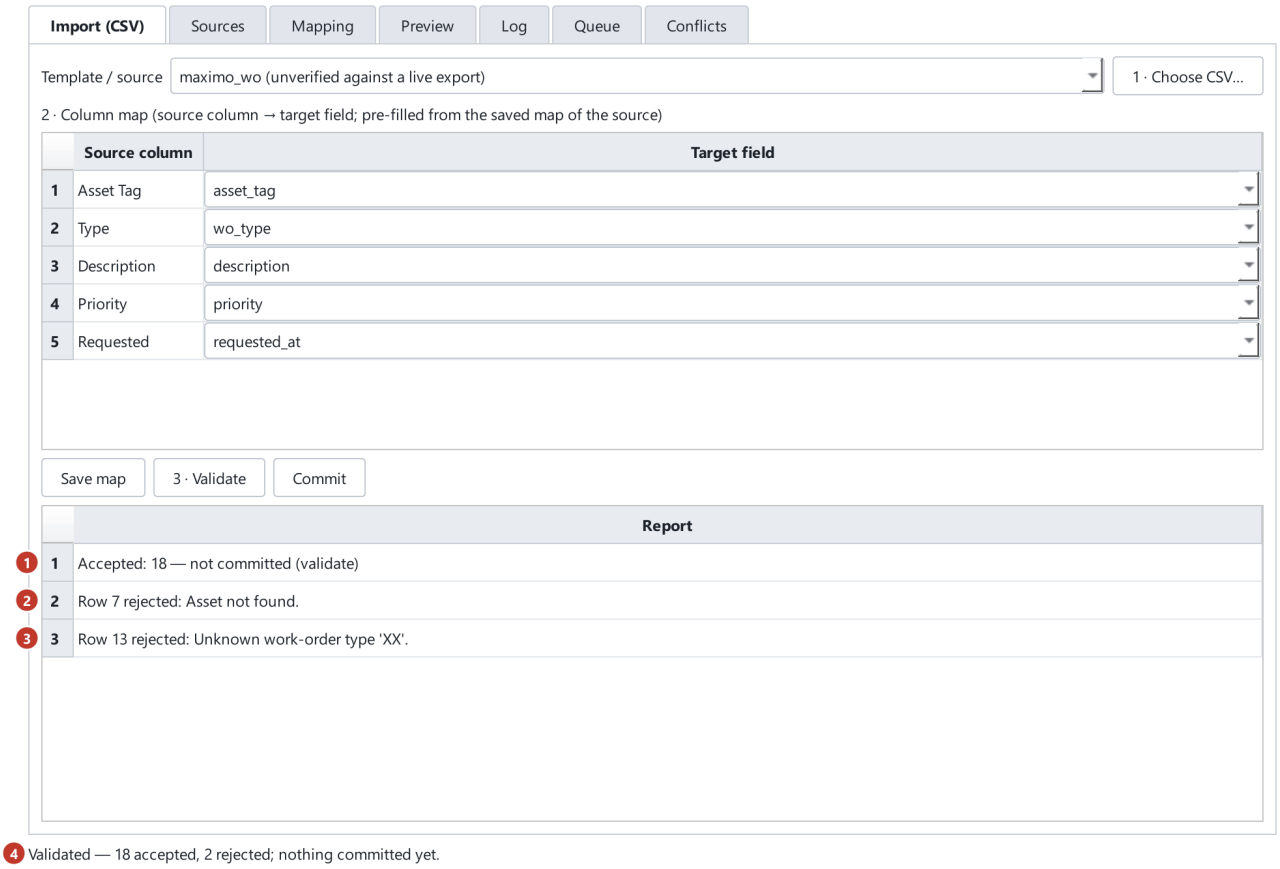


Steps 11 and 12 — the five columns mapped

- ① The column map as Part 2's table gives it.
- ② 3 · Validate.

11. ① **In each row's Target field, choose the detail** of Part 2's table.
12. ② **Click 3 · Validate.**

13. **Read the report, then click Commit:**

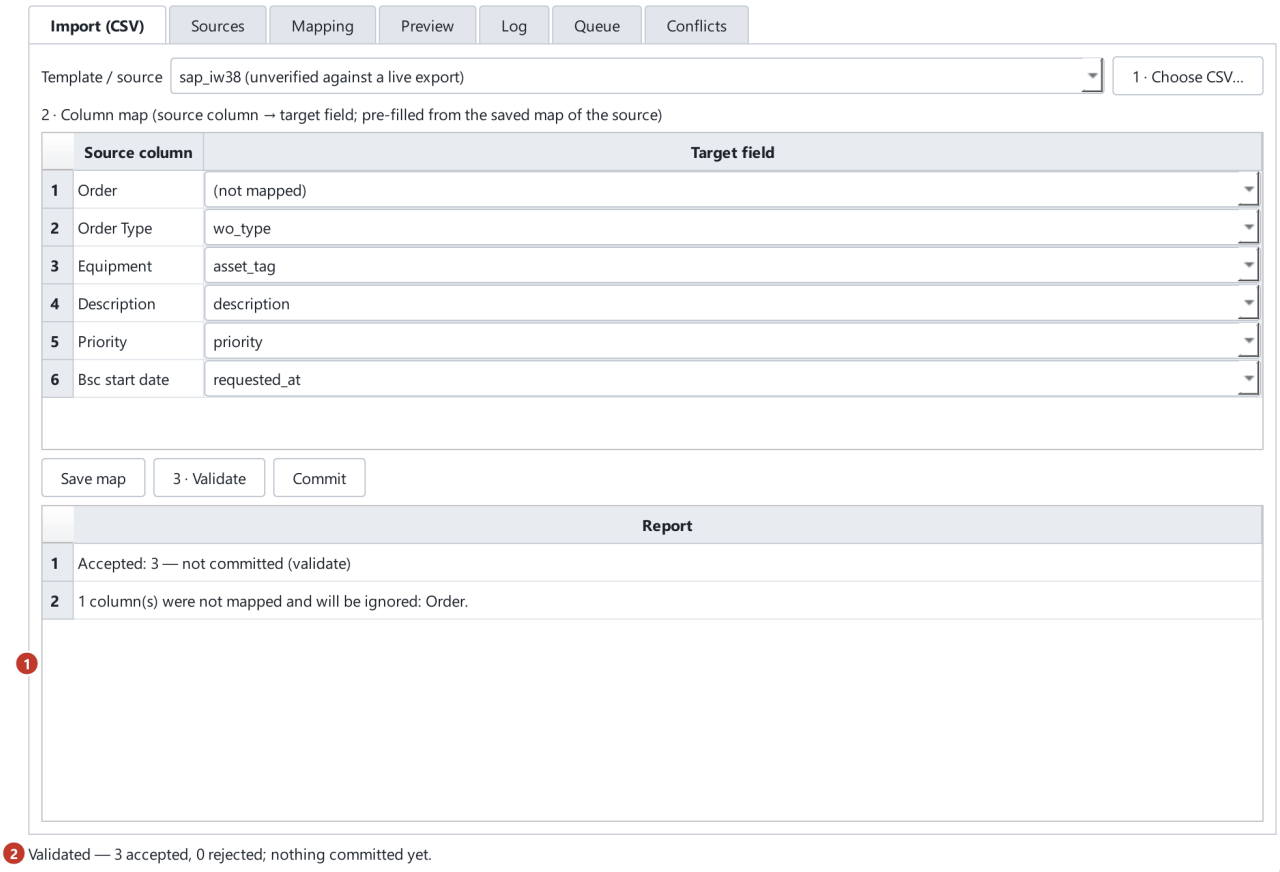


Step 13 — the report after 3 · Validate

- ① The first line of Report.
- ② and ③ The two refused rows.
- ④ The foot line.

Part 4 — The result, picture by picture

After 3 · Validate of step 7:

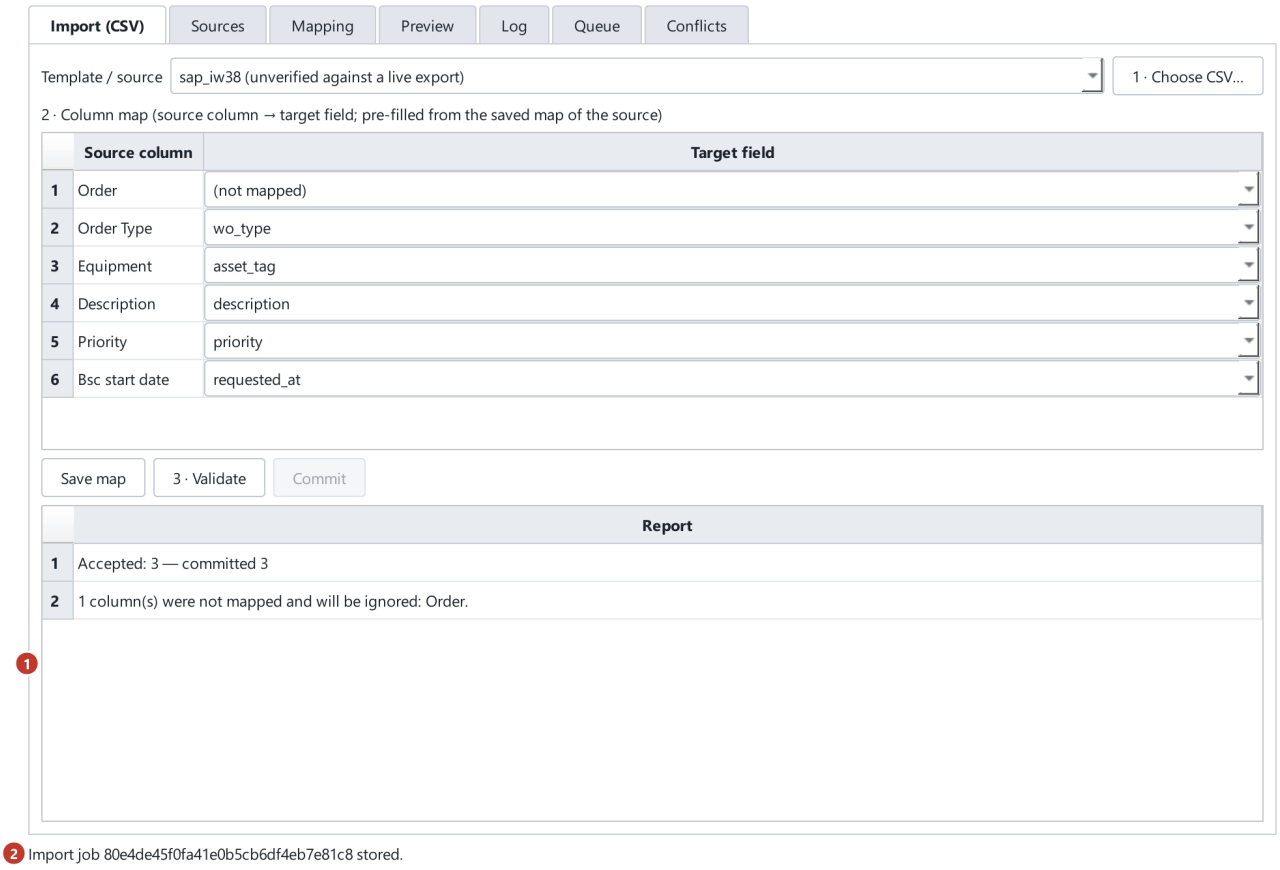


The SAP file after 3 · Validate

- ① Report: Accepted: 3 — not committed (validate), then 1 column(s) were not mapped and will be ignored: Order.
- ② The foot line: Validated — 3 accepted, 0 rejected; nothing committed yet.

What to decide. Three rows loaded, three accepted, none refused: the file goes in whole. Leaving Order out is right unless each work order must be traced back to its SAP order; then keep the export.

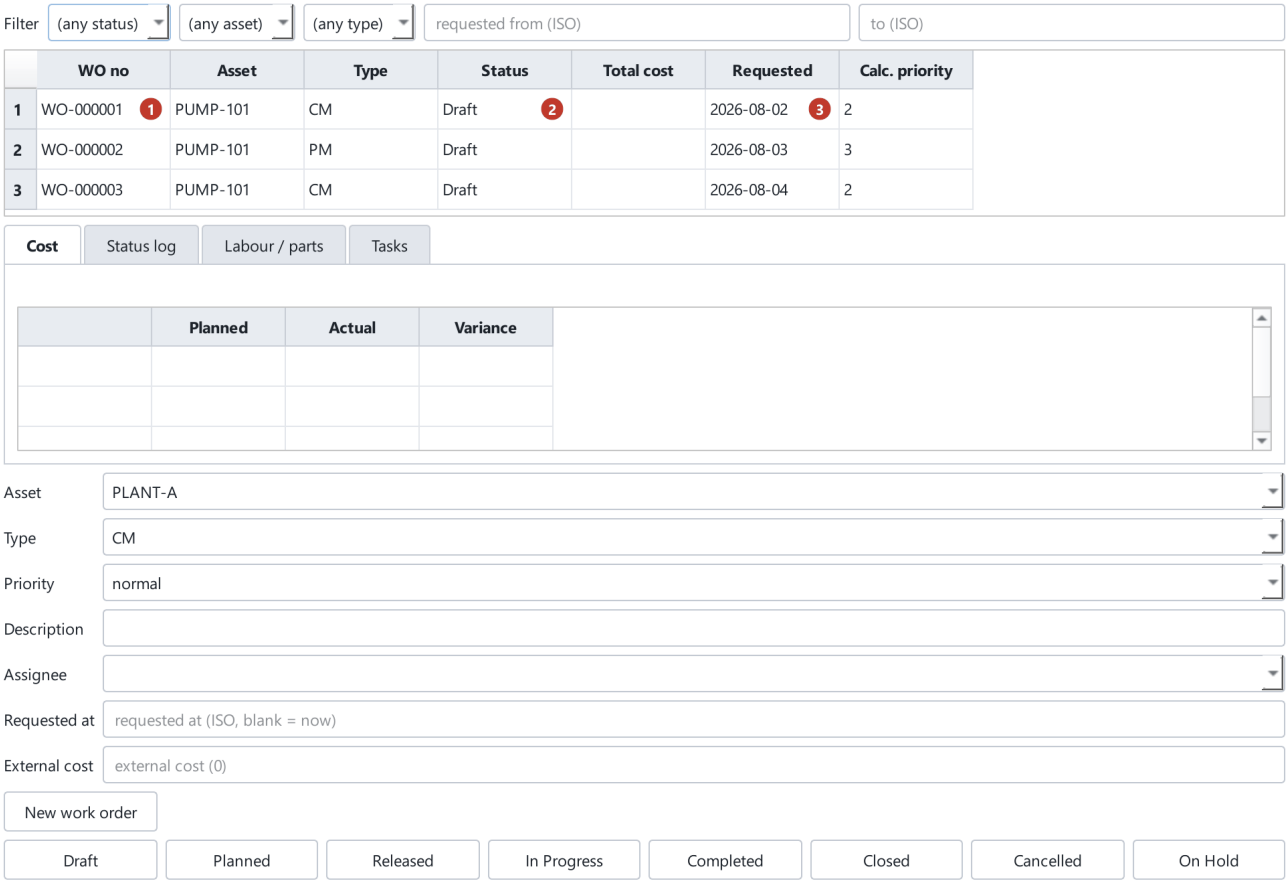
After Commit of step 8:



The SAP file after Commit

- ① Report: the first line now reads Accepted: 3 — committed 3.
- ② The foot line: Import job … stored., naming the job by its number.

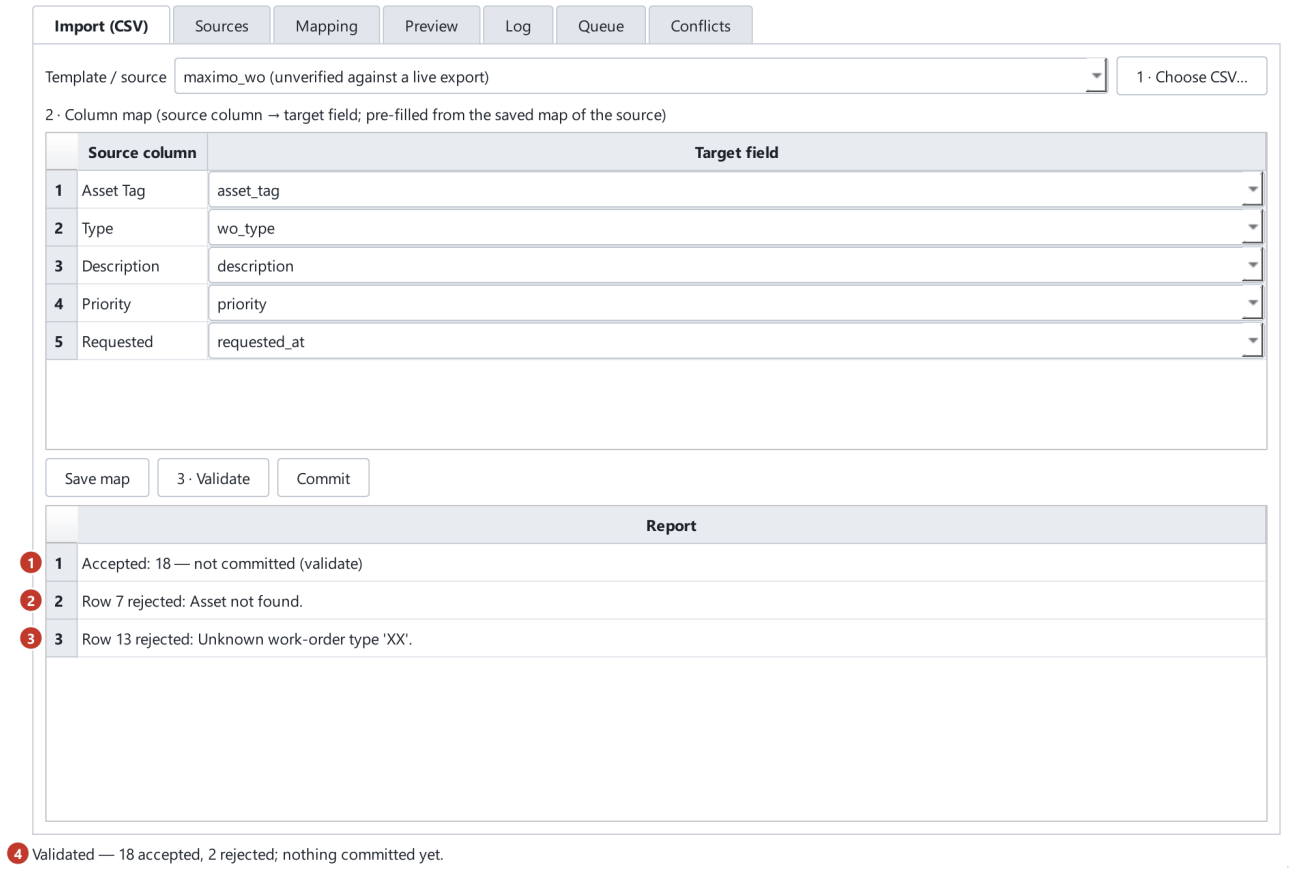
The list in CMMS ▸ Work Orders… after the import:



The work-order list after the SAP import

- ① WO no: WO-000001 to WO-000003. ReliaEn numbers the orders itself; 4000123 to 4000125 are not carried.
- ② Status: Draft on all three. An imported order starts as a draft.
- ③ Requested: 2026-08-02, then -03 and -04, from Bsc start date.

After 3 · Validate of step 12:

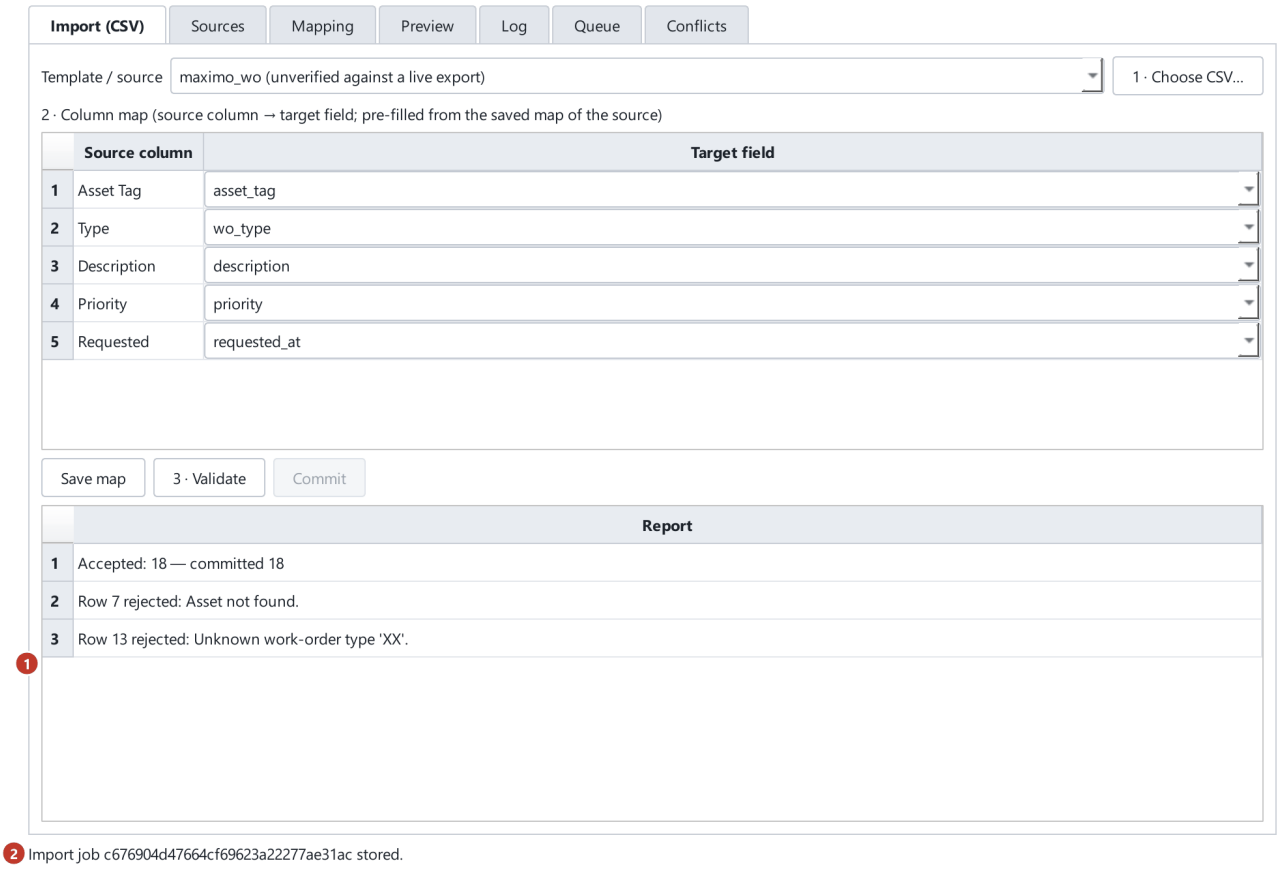


The planner's file after 3 · Validate

- ① Accepted: 18 — not committed (validate). Of the 20 rows, 18 pass the checks.
- ② Row 7 rejected: Asset not found. GHOST-1 is not in the CMMS file.
- ③ Row 13 rejected: Unknown work-order type 'XX'. A type must be CM, PM, PdM, MOD, SAFETY or OTHER.
- ④ The foot line: Validated — 18 accepted, 2 rejected; nothing committed yet.

What to decide. The two refused rows are named before anything is stored. Correct them in the file and choose it again, or commit the 18 and bring the two in afterwards.

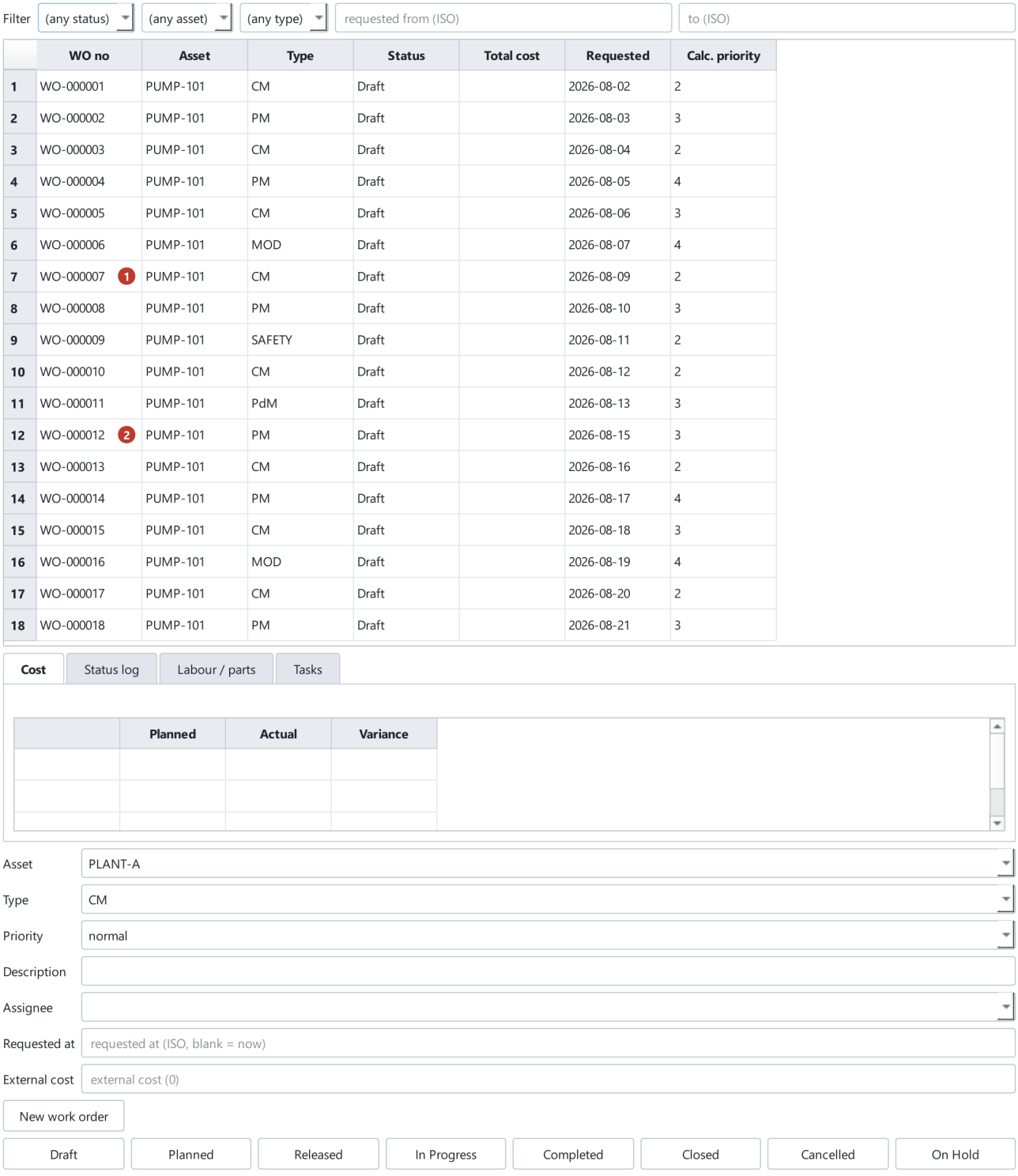
After Commit of step 13:



The planner's file after Commit

- ① Report: Accepted: 18 — committed 18, and the two refused rows stay listed: no row is dropped without a line.
- ② The foot line: Import job … stored.

The list in CMMS ▸ Work Orders… after this import:



The work-order list after the planner's import

- ① WO-000007 is the file's row 8 (Vibration check, 2026-08-09): the refused row 7 of 2026-08-08 has no order.
- ② WO-000012 is the file's row 14 (Alignment check, 2026-08-15): the refused row 13 of 2026-08-14 has none.

Part 5 — How to interpret the results

Validate first, every time. Refused rows are listed before anything is stored. A commit is not undone as a whole: each imported order is then handled like any other under CMMS ▸ Work Orders….

Check Accepted against the rows you expected. 3 row(s) loaded and Accepted: 3 mean every row went in. 20 row(s) loaded and Accepted: 18 mean two are still to be entered.

A refused asset tag means the asset is missing in ReliaEn, not that the row is wrong: create it under CMMS ▸ Assets… first, then import.

A changed map is saved under the template you chose. 3 · Validate saves the map on screen as the template's map, so the second example replaced the maximo_wo layout with the planner's. A later Maximo export then shows (not mapped) on every row: map it again and click Save map, which confirms Column map saved for maximo_wo. Keep one template for one kind of export.

The templates are unverified. (unverified against a live export) means the column names follow the other system's published layout and have not been checked against a live installation. Check the map on the first import.

Import each job from one system only. With the other system's number (not mapped), nothing ties an imported order to its source: the same job imported twice is stored twice.