Network Rail

ARMS - Asbestos Risk Management System

Training Guide for use of the Import Survey Template

The ARMS Import Survey Template

New *Asbestos Management Surveys* and their *Survey Detail reports* can be added to the Asbestos Risk Management System (ARMS) using the **Import Survey Template** excel file. Each Survey Detail to be imported is added as a single row in the spreadsheet and the whole file can then be imported from the *Site Surveys Performed* screen for the target asset in ARMS.

The Import Survey Template is distributed and controlled by Network Rail. In order to ensure consistency and correct functioning of imports, it is vital that all contractors use the latest distributed version of the template.

The template should only be used for importing new Asbestos Management surveys and only one Survey can be added per template (along with associated Survey Detail reports).

In situations where multiple surveys are to be imported, multiple Import Templates should be used and each Template should not contain information for more than one survey.

Planned Re-Inspection surveys and Remediation Updates are automatically generated by ARMS and should not be imported.

The Import Survey Template can only be used to import Surveys where the associated Asset already exists in ARMS.

The aim of this document is to explain how records should be added to the Template and to describe key aspects of the import process.

The Import Survey Process

The steps below describe the process for importing a single survey and its associated survey detail reports using the Import Survey Template:-

- o Download and open the *Import Survey Template* using the link found on the ARMS login page

- o Populate the template with the information for a single survey to be imported. Each survey detail report should be on a separate row.

    Guidance for adding an asset can be found later in this document, but the basic structure of the template is shown in the screenshots below

A conditionally mandatory field warning

- Save a copy of the template

- Login in to ARMS at **https://arms.networkrail.co.uk**

- Navigate to the asset for which the survey is to be imported, for example via the *Search Sites / Properties* or *My Favourite Assets* screens

- On the *Site / Property Details* screen, left-click on the **Survey List** tab
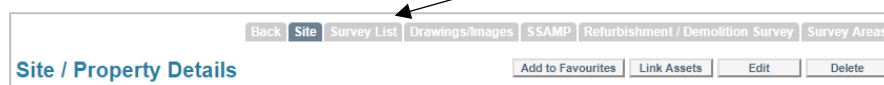
- On the *Site Surveys Performed* screen, left-click on the **Import Survey** button found to the top-right of the screen

- If the **Import Survey** button is not visible, your ARMS account does not have the correct permissions to import surveys and you may need to submit a request for your account to be updated

- On the *Import Survey* screen, left-click on the **Choose file** button and then select the template that you wish to upload from the *Open* file dialog box

- Use the **Descriptive Caption** field to add a caption for the import. The caption will be used to identify the import

- Left-click on the **Upload** button to confirm the import

o The *My Imports Queue* screen will be displayed, showing all of the imports that you have performed (for both assets and surveys)

o The **State** and **View Log** columns will update as your import is processed and are explained in more detail later in this document

Mandatory Fields

The table below lists the template fields that are mandatory for the successful import of an asset, along with the input type and any restrictions applied to the input data.

Field Name	Input Type	Restrictions
Asset ID	Free text	*Max 100 characters*
Site / Property Name	Free text	*Max 255 characters*
Survey Date	Date time	*Must be acceptable date format e.g. dd/mm/yyyy*
Survey Type	Dropdown	*Dropdown values only*
Primary Contractor	Dropdown	*Dropdown values only*
Surveyor's Name	Free text	*Max 255 characters*
Telephone Number	Free text	*Max 20 characters*
Lab Test Performed?	Dropdown	*Dropdown values only*
Survey Detail Date	Date time	*Must be acceptable date format e.g. dd/mm/yyyy*
Building Name	Free text	*Max 255 characters*
Asbestos Location	Free text	*Max 255 characters*
Asbestos Type	Dropdown	*Dropdown values only*
Survey Detail Comments	Free text	*Max 8,000 characters*

Non-mandatory fields

The table below lists the template fields that are not mandatory under any circumstances, along with the input type and any restrictions applied to the input data.

Field Name	Input Type	Restrictions
Lab Test Date	Date time	*Must be acceptable date format e.g. dd/mm/yyyy*
Locations Not Inspected	Free text	*Max 2GB*
Comments	Free text	*Max 2GB*
Primary Contractor (Detail)	Dropdown	*Dropdown values only*
External Name	Free text	*Max 255 characters*
Floor Name	Free text	*Max 255 characters*
Floor Type	Dropdown	*Dropdown values only*
Room Name (if any)	Free text	*Max 255 characters*
Referred to Sample	Free text	*Max 2,000 characters*
Secondary Product Type	Dropdown	*Dropdown values only*
Risk Assessment	Free text	*Max 8,000 characters*

Conditional Mandatory Fields

The table below lists the template fields that can become mandatory as a result of values selected for other fields, along with the conditions under which the field becomes mandatory, the input type and any restrictions applied to the data input.

Field Name	Condition	Input Type	Restrictions
Lab Test Date	**Lab Test Performed?** Field is set to *"Yes"*	Date time	*Must be acceptable date format e.g. dd/mm/yyyy*
Asbestos Known or Presumed?	**Asbestos Type** field is set to a value indicating that asbestos is present or presumed	Dropdown	*Dropdown values only*
Extent of Damage or Deterioration		Dropdown	*Dropdown values only*
Surface Treatment		Dropdown	*Dropdown values only*
Product Type		Dropdown	*Dropdown values only*
Main type of activity in area	**Asbestos Type** field is set to a value indicating that asbestos is present or presumed	Dropdown	*Dropdown values only*
Main type of activity in area - Description		Free text	*Max 8,000 characters*
Secondary activities in the area		Dropdown	*Dropdown values only*
Location		Dropdown	*Dropdown values only*
Accessibility		Dropdown	*Dropdown values only*
Extent / Amount		Dropdown	*Dropdown values only*
Quantity of asbestos present		Free text	*Max 2,000 characters*
Number of Occupants		Dropdown	*Dropdown values only*
Frequency of use of area		Dropdown	*Dropdown values only*
Average time area in use		Dropdown	*Dropdown values only*
Type of maintenance activity		Dropdown	*Dropdown values only*
Frequency of maintenance activity		Dropdown	*Dropdown values only*
Surveyors recommended action		Dropdown	*Dropdown values only*
Exact quantity of removal work required		Free text	*Max 2,000 characters*

Guidance for Populating the Import Survey Template

Determining the order of Survey Detail reports in the Template

The order in which *Survey Detail report* records are added in an Import Template will be mirrored in the *Survey Reports Available* section of the *Site Survey* screen within ARMS.
It may therefore be advisable to add the rows to the Import Template in an order that reflects the layout of the asset and its areas and / or the workflow by which the surveys were carried-out.

So that *Survey Detail reports* are listed in an appropriate order within ARMS, they should be added to the Import Template in a logical order as set out in **HSG264** (Asbestos: The survey guide). The guidance states that the survey should be performed in a structured, methodical and systematic manner.

Populating Survey-level information

Each row of data in the Import Survey Template represents a *Survey Detail report* for an area with the asset being surveyed. It is also necessary to import the details of the *Survey* itself.

The Survey fields in the first data row of the Import Template will be used to populate the Survey record within ARMS. Any Survey-level information added in subsequent rows will be ignored.

Any missing or invalid data may cause the import to be aborted, even if the correct information is present in subsequent records.

The following Import Template fields (when in the **first data row**) are used to populate a Survey within ARMS:-

- Asset ID
- Site / Property Name
- Survey Date
- Survey Type
- Primary Contractor
- Surveyor's Name
- Telephone Number
- Lab Test Performed?
- Lab Test Date

Adding Lab Test Information

The **Lab Test Performed** and **Lab Test Date** columns in the Survey Import Template relate to the survey itself, rather than an individual Survey Detail report. The Lab Test Performed and Lab Test Date fields for a Survey will always be set from the first row of the Import Template – any values entered in subsequent rows will be ignored.

Managing Records for Large Sites

For **Assets** where a large number of buildings must be added to ARMS, a coherent naming convention may be appropriate: including the names areas and groupings of buildings within the asset, would be a suitable approach (e.g. Euston Station Parcel Deck, Euston Station Concourse).

Recording Additional Information

The fields found in the Survey Import Template are extensive and detailed, however it may sometimes be necessary to provide further supporting or background information for a *Survey* or *Survey Detail report*.

Further information can be added for a *Survey* by using the **Comments** field of the first row in the template, and for a *Survey Detail report* by using the **Survey Detail Comments** field of the appropriate row.

Uploading Documents, Drawings and Images

The Import Survey process does not allow for the upload of related files, such as documents, drawings or images. These files should be uploaded in ARMS manually, once the survey import has been completed.

How Does ARMS Validate the Import Survey Template?

When a Survey Template is imported, the Survey level information in the first row of the document will be checked, along with the details of each Survey Detail report.

To ensure that only valid and complete Survey information is added to ARMS, a Survey and its Survey Details reports are only imported when no errors are found, i.e. it is not possible for a Survey Import to be partially completed.

When an import has been unsuccessful, the **Output Log** will identify and detail every individual error found within the Import Template.

When will the Survey Import Process Fail?

Ultimately, any form of error found within the records of a Survey Import Template will prevent all records within the document being imported.

The list below summarises the scenarios where an error is identified and the import is not carried-out:-

- **Missing Asset ID**: any record where the Asset ID is not present

- **Non-matching Survey Detail report Asset ID**: any record where the Asset ID does not match that specified for the Survey itself (i.e. set in the first record)

- **Non-matching Survey Asset ID**: when the Asset ID values are the same for all records, but do not match the Asset ID for an Asset currently held in ARMS

- **Invalid Survey-level information**: when one or more Survey-level fields specified in the first row of the template are invalid. For example, a mandatory field may be missing, a date may be in an incorrect format or a dropdown field may contain a value that is not present in the provided list

- **Invalid Survey Detail report information**: when fields relating Survey Detail reports are invalid. This may be due to mandatory fields that are empty, fields where the content exceeds the allowed limit, incorrectly formatted dates or a dropdown field that contains a value that is not present in the provided list

Viewing and Understanding the Output Summary

The status of your recent Survey Imports can be viewed on the **My Imports Queue** screen in ARMS, which can be accessed by selecting *My Imports* from the left menu.

Once the import of an **Import Survey Template** has been completed, the *State* for the import within ARMS will be updated and the *Log* will be populated with the *Output Summary* for the import.


Imports that have been completed successfully will have their **State** set to "*COMPLETED*", while imports that have been unsuccessful will have their **State** set to "*COMPLETED - PROCESSING ERRORS*".

For any import that is in progress or has completed, the **Log** can be viewed to see the current state of the import. This can be particularly useful for imports that have been unsuccessful, as the Output Log can be viewed to identify the assets that have failed to import and the reason(s) for the failure.

To view the Output Log, left-click on the icon for the required import item to display the **Log Output** dialog box.
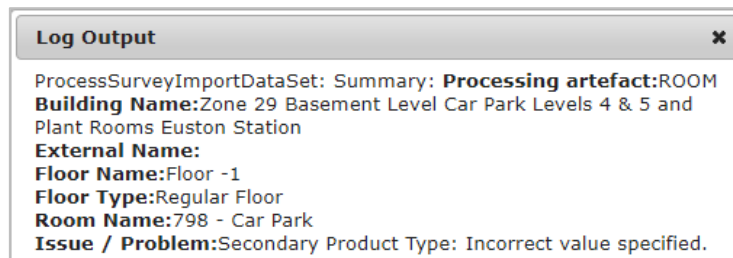
The above image shows the Log Output for a *Survey* import that failed due to an incorrect value being provided for the **Secondary Product Type** field for a record relating to the room called *798 – Car Park*.

The information included in the log can be used to easily identify the record within the template. A Log Output could show multiple error messages for the same import.

How many Survey Detail Items can be Included in an Import Template?

ARMS places no restrictions on the number of Survey Detail Items that can imported or updated using a single Import Template.

However, it is important to remember that larger imports will take longer to complete.