

Standard Item Import Interface

Quick Reference Guide

Version 24.x

Last Modified 24.0 | March 2024

Overview

The Standard Item Import Interface allows you to create new master items records and load specific item values from a file for the following:

- Accidents
- Units
- Components
- Tech Specs
- Departments
- Vendors
- Part Purchase Orders
- Drivers
- Locations

Why:

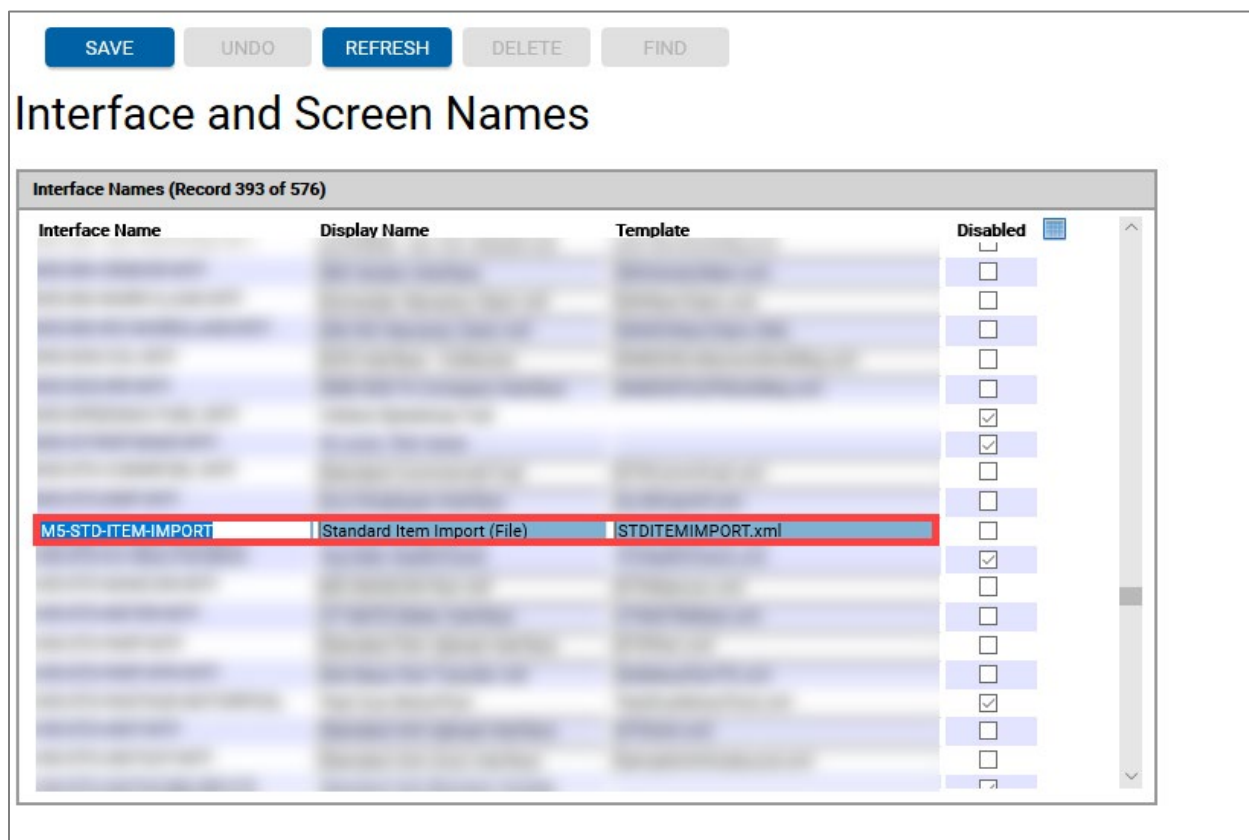
- Rather than update or create records one at a time, you can use this interface to update or create multiple records in one interface run.

How:

- The interface reads and validates items in the file and creates an ITEM_LIST master entry if the parameter is set.
- It also creates an entry for each item in the appropriate ITEM table.
- Rejects are sent to the Interface Reject Manager for further review and resubmission after corrections have been made.
- The interface creates a program log file that is useful in case of program failure.
- By default, it is located in the M5\Interface\Logs directory.
- After the interface completes running, an email is sent indicating the number of records successfully processed and any that failed validation rules and were rejected.

Interface and Screen Names

To run the interface, you must make sure the interface is enabled for use.



To verify:

1. Navigate to the Interface and Screen Names frame.
2. Scroll the list until you find **M5-STD-ITEM-IMPORT** on the list.
3. Make sure the **Disabled** checkbox is cleared.
4. If it is selected and you want to run the interface, clear the checkbox and select **SAVE**.

Interface Manager

After verifying that the interface is enabled for use, navigate to the Interface Manager frame. To locate the interface, select the dropdown menu to select it from the list or enter to find it quicker.

SAVE

UNDO


REFRESH

DELETE

FIND

Interface Manager

Interface:



Standard Item Import (File)

Number	Description	Value
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Refresh

Current Execution Schedule (Loaded 0 records)

ID	Description	Status	Schedule Date	Last Run	Frequency	Exclude Holidays	Submitted By	Run Desc
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Interface Parameters

SAVE
UNDO
REFRESH
DELETE
FIND

Interface Manager

Interface: Standard Item Import (File)



Interface Parameters (Record 5 of 5)

Number	Description	Value
1	INPUT FILE PATH	C:/M5/INTERFACEFILES/STDITEM/IN
2	OUTPUT FILE PATH	C:/M5/INTERFACEFILES/STDITEM/OUT
3	EMAIL	FLEETPERSONNEL@ASSETWORKS.COM
4	CREATE MASTER (Y/N)	Y
5	FILE TYPE (C,F,P,S,T,X)	C

Refresh

- The most recent set of saved parameters will load when the i-frame loads. Unlike some interface frames, you are not able to save different sets of parameters.
- To change any of the five values, enter in the new information and select **SAVE**.

Interface Parameter Explanations

Parameter Name	Description	Required (Y/N)
INPUT FILE PATH	<p>File path where the input file will be found. Note: This path refers to the C: drive on the batch server.</p> <p> The directory name should not end with a “\”, and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format.</p>	Y
OUTPUT FILE PATH	<p>File path where the file will be moved upon completion of the interface. Note: This path refers to the C: drive on the batch server.</p> <p> The directory name should not end with a “\”, and can either be a mapped drive (C:, Q:, etc.) or with a \\server name\share\directory format.</p>	Y
EMAIL	User to whom an email updates will be sent upon about the interface run.	Y
CREATE MASTER (Y/N)	If set to Y, the interface will create a new ITEM_LIST master entry if one does not exist. If set to N, the interface will reject a transaction where the item doesn't exist.	Y

Parameter Name	Description	Required (Y/N)
FILE TYPE (C,F,P,S,T,X)	<p>Type of file format being used as input. The file will be preprocessed into an XML message which will be sent to the interface.</p> <ul style="list-style-type: none"> • C – Comma • F – Fixed • P – Pipe • S – Semicolon • T – Tab • X - XML 	Y



The interface creates a program log file useful in case of program failure. By default, it will be in the M5\Interface\Logs directory.

File Data

XML Format

Tag Name	Description	M5 Column	Example
<TARGET>	Target Table Name. This table name will be translated to the correct target type for the ITEM_LIST. i.e. If the Target Table Name is UNIT_ITEM, the program will translate this to U.	ITEM_LIST.TARGET	UNIT_ITEM translates to U.
<OVERWRITE_DATA>	If a value is found for this item, overwrite it if this flag is set to Y, otherwise leave the existing value	N/A	N/A
<OBJECT>	The value of the object associated with this item	N/A	UNIT_NO
<ITEM_VALUE>	The value to be assigned to this object's item. Will be validated using DATA_TYPE, to ensure that valid data is being place in the item.	XXXX_ITEM.VALUE	RED
<ITEM_NAME>	The item name.	ITEM_LIST.ITEM	COLOR
<DATA_TYPE>	Data type, must be C for character, N for numeric, D for date	ITEM_LIST.DATA_TYPE	C

Fixed Format

Field Name	Start Position	Length	Valid Values	M5 Column
TARGET	1	15	N/A	ITEM_LIST.TARGET
OBJECT	16	30	N/A	XXXX_ITEM.XXXX_ID
OVERWRITE_DATA	46	1	Y or N	N/A
DATA_TYPE	47	1	C, D, or N	ITEM_LIST.FIELD_TYPE
ITEM_NAME	48	24	N/A	ITEM_LIST.ITEM XXXX.ITEM_VALUE
ITEM_VALUE	72	50	Data in this field must match the data type in DATA_TYPE	XXXX_ITEM.VALUE

Delimited Format (includes comma, semicolon, tab, and pipe)

Field Name	Position	Valid Values	M5 Column
TARGET	1	N/A	ITEM_LIST.TARGET
OBJECT	2	N/A	XXXX_ITEM.XXXX_ID
OVERWRITE_DATA	3	Y or N	N/A
DATA_TYPE	4	C, D, or N	ITEM_LIST.FIELD_TYPE
ITEM_NAME	5	N/A	ITEM_LIST.ITEM XXXX.ITEM_VALUE
ITEM_VALUE	6	Data in this field must match the data type in DATA_TYPE	XXXX_ITEM.VALUE

Sample Data

XML Format

```
<ITEMS>
  <ITEM>
    <TARGET>UNIT_ITEM</TARGET>
    <OBJECT>TXD1</OBJECT>
    <OVERWRITE_DATA>Y</OVERWRITE_DATA>
    <DATA_TYPE>C</DATA_TYPE>
    <ITEM_NAME>KEY #</ITEM_NAME>
    <ITEM_VALUE>7629A</ITEM_VALUE>
  </ITEM>
  <ITEM>
    <TARGET>SPEC_ITEM</TARGET>
    <OBJECT>08VWRB4</OBJECT>
    <OVERWRITE_DATA>N</OVERWRITE_DATA>
    <DATA_TYPE>N</DATA_TYPE>
    <ITEM_NAME>BUDGET YEAR</ITEM_NAME>
    <ITEM_VALUE>2007</ITEM_VALUE>
  </ITEM>
</ITEMS>
```

Fixed Format

UNIT_ITEM	TXD1	Y	KEY #	7629A
SPEC_ITEM	08VWRB4	N	NNBUDGET YEAR	2007

Delimited Format

UNIT_ITEM, TXD1, Y, C, KEY #, 7629A
SPEC_ITEM, 08VWRB4, N, N, BUDGET YEAR, 2007

Current Execution Schedule

The i-frame displays the current execution schedule for this interface. Currently and previously scheduled runs along with their ID, Description, Status, Scheduled Date, Last Run Date, Frequency, Exclude Holidays, Submitted By and Run Desc display.

Refresh

Current Execution Schedule (Loaded 1 records)

ID	Description	Status	Schedule Date	Last Run	Frequency	Exclude Holidays	Submitted By
77033	M5-STD-ITEM-IMPORT	Scheduled	04/09/2020 14:16:46		Once	N	

Schedule Details

Run Interval: Once

Exclude weekends and holidays: ☐

First execution date/time:

Schedule / Reschedule

Schedule Details

Schedule Details

Run Interval: 5

First execution date/time: 04/03/2020 00:00:00

Schedule / Reschedule

Once
Minutes
Hours
Days
Months

Exclude weekends and holidays: ☒

To schedule the interface, enter schedule details.

- Select the run interval (Once, Minutes, Hours, Days, Months).
 - If only running once, right now, you can select **Once**, then select the **Schedule/Reschedule** button.
 - If you select Minutes, Hours, Days, or Months, enter a value for the interval in the **Run Interval** field that displays after selection is made.
- If you would like to exclude weekends and holidays from the run then select the **Exclude weekends and holidays** checkbox.

3. Enter a **First Execution Date/Time** from which the run interval value should apply.
4. When finished, select the **Schedule/Reschedule** button.

Interface Reject Manager

To view rejects for the Standard Item Import interface, navigate to the **Interface Reject Manager** frame.

The screenshot shows the 'Interface Reject Manager' window. At the top are buttons: SAVE, UNDO, REFRESH, DELETE, and FIND. Below the title 'Interface Reject Manager' is a section labeled 'Interface:'. It contains a search bar with the text 'standard item' and a magnifying glass icon. Below the search bar is a dropdown menu with the option 'Standard Item Import (File)'. Below this is a table titled 'Interface Statistics (Loaded 6 records)'.

Stat ID	Run Date	Total Processed	Pass	Fail	Successful Reprocess	Elapsed Time In Hrs.
78726	05/10/2019 13:40:32	4	0	4	0	0.00
78725	05/10/2019 13:21:32	4	0	4	0	0.00
77976	11/13/2017 13:21:33	1	1	0	0	0.00

To locate the interface, select the dropdown menu to select it from the list or enter to find it quicker.

The screenshot shows the 'Interface Reject Manager' window. At the top are buttons: SAVE, UNDO, REFRESH, DELETE, and FIND. Below the title 'Interface Reject Manager' is a section labeled 'Interface:'. It contains a dropdown menu with the text 'Standard Item Import (File)'. Below this is a table titled 'Interface Statistics (Record 9 of 14)'.

Stat ID	Run Date	Total Processed	Pass	Fail	Successful Reprocess	Elapsed Time In Hrs.
78726	05/10/2019 13:40:32	4	0	4	0	0.00
78725	05/10/2019 13:21:32	4	0	4	0	0.00
77976	11/13/2017 13:21:33	1	1	0	0	0.00

Below the statistics table is a section labeled 'Interface Rejects (Loaded 4 records)'.

Resubmit	Stat ID	Error Msg No	Target	Object	Item	Data Type
<input type="checkbox"/>	78726	IF540	Tech Spec	CNTECHSPEC1	A99	Char AB
<input type="checkbox"/>	78726	IF540	Tech Spec	0006	AERIAL MFG	Char FLYER
<input type="checkbox"/>	78726	IF500	Unit	CNUNIT105	808 TEST	Char test 2
<input type="checkbox"/>	78726	IF500	Unit	07332	ASPX	Char A

1. After selected, the **Interface Statistics** i-frame displays.
2. Select the **Stat ID** for the run you want to view and the **Interface Rejects** i-frame displays.
 - You can scroll to the bottom and select **Show All** in the last row to view all run statistics together. However, there is a limit the amount of data M5 can display at one time.
3. If an **Error Msg No.** is available, you can hover over it with your mouse to display the message.
 - Example: IF500 – UNIT NUMBER does not exist.
4. After you have made the necessary corrections in M5, you can select the **Resubmit** checkbox for each record you want to resubmit.
5. You can also delete any records you do not want to correct or resubmit.
6. Select **SAVE** to reprocess the rejected records.

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.