

Standard Part Upload Interface

Quick Reference Guide

Version 24.x

Last Modified 24.0 | March 2024

Overview

The Standard Part Upload Interface uses an input file format that allows you to:

- Upload master part catalog records (Part Main Catalog)..
- Upload inventory location-specific records (Part Inventory Location Manager).
- Upload part item specific records (Part Items).

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.
- ❗ Please note, it is recommended to use three separate input files. One for Part Main records, a second for Part Inventory Location records, and a third for Part Items.

Interface and Screen Names

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

SAVE UNDO REFRESH DELETE FIND

Interface and Screen Names

Interface Names (Record 397 of 576)

Interface Name	Display Name	Template	Disabled
			<input checked="" type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
M5-STD-PART-INTF	Standard Part Upload Interface	STDPart.xml	<input type="checkbox"/>
			<input type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

To verify:

1. Navigate to the Interface and Screen Names frame.
2. Scroll the list until you find **M5-STD-PART-INTF** 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

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Interface Manager

Interface:

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Standard Part Upload Interface

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

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Interface Manager

Interface: Standard Part Upload Interface



Interface Parameters (Record 6 of 6)

Number	Description	Value
1	INPUT FILE PATH	C:\M5\INTERFACEFILES\STDPART\IN
2	OUTPUT FILE PATH	C:\M5\INTERFACEFILES\STDPART\OUT
3	EMAIL TO	PARTSROOM@ASSETWORKS.COM
4	EMAIL FROM	INTERFACE@ASSETWORKS.COM
5	DEFAULT LOCATION	PMC
6	FILE TYPE (EXTENSION)	...

Refresh

- The most recent set of saved parameters will load when the frame loads. Unlike some interface frame, you are not able to save different sets of parameters.
- To change any of the six 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 TO	User to whom an email updates will be sent upon about the interface run.	Y
EMAIL FROM	User from whom the email originates. The default is: Interface@assetworks.com.	Y

Parameter Name	Description	Required (Y/N)
DEFAULT LOCATION	Must be a valid M5 inventory location.	Y
FILE TYPE (C,F,P,S,T,X)	Type of file format being used as input. The file will be preprocessed into an XML message which will be sent to the interface. <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

- The data is contained in text file with the following layout.
- The data file will be pre-processed, data elements extracted and reformatted into an XML message which will then be sent to the interface.
- This allows you to use a variety of file formats.
- **Bolded** fields are required.

Sample Data

Column	Column Name	Description	Maps to M5 Column	Required (Y/N)
1	Record Type	Type 1 = Part Catalog Type 2 = Part Inventory Location Type 3 = Part Item	N/A	Y
2	Location	Must be a valid inventory location	parts.location part_inv_loc.location	Y (if record type = 2)
3	Part No.	The master part number	parts.part.no	Y

Column	Column Name	Description	Maps to M5 Column	Required (Y/N)
4	Manufacturer	A valid M5 Manufacturer	parts.manufacturer	Y (refer to System Flag 5024)
5	Description	Part Description	parts.description	Y
6	Part Type	Type of part, N, U or R	parts.part_type	N (defaults to New)
7	Extended Description	Long description	parts.notes	N
8	Price	Unit price	parts.unit_do	Y
9	ATA System	Valid system code	parts.u_system	N (refer to System Flag 5058)
10	ATA Assembly	Valid assembly code	parts.component	N
11	ATA Part	Valid part code for system/assembly combo	parts.ata_part	N
12	Validate System Code	Y or Blank	parts.val_sys_cd	N
13	Unit of Inventory	Unit of Measure	parts.unit_inventory	Y
14	Commodity	Valid M5 Commodity Code	parts.commodity	N
15	Hazard	Y or Blank	parts.hazard_fl	N
16	Disable Receipt	Y or Blank	parts.disable_fl	N
17	Warranty	Y or Blank	parts.warranty_fl	N
18	Exempt Position Code	Y or Blank	parts.exempt_pos_cd_fl	N
19	Charge Code	Valid charge code	parts.charge_code	N
20	Cost Category	Valid cost category	parts.cost_cat_code	N
21	Stock Type	S, N or C	parts.ni_ns_fl	Y
22	Primary Vendor	Valid M5 Vendor	parts.pri_vendor_no	N
23	Secondary Vendor	Valid M5 Vendor	parts.sec_vendor_no	N
24	Season Code	Valid season code	parts.season_code	N
25	Serialized	O, M or Blank	parts.serial_fl	N

Column	Column Name	Description	Maps to M5 Column	Required (Y/N)
26	Reusable Serial Number	Y or Blank	parts.serial_reuse	N
27	Core Tracking	Y or Blank	parts.core_fl	N
28	Core Charge		parts.core_charge	N
29	Bin	Inventory Bin/Area	part_inv_store.area	N
30	Minimum qty	Minimum inventory qty	part_inv_loc.PRI_VE N_MIN_ORD, part_inv_loc.SEC_VE N_MIN_ORD	N
31	Maximum qty	Maximum inventory qty	part_inv_loc.PRI_VE N_MAX_ORD, part_inv_loc.SEC_VE N_MAX_ORD	N
32	Part Item	Valid item from Item Master list	part_item.item	Y for Type 3 upload only
33	Part Item Value	Value for Part Item	part_item.value	Y for Type 3 upload only
34	Vendor Part Number	A Vendor part xref will be created	part_inv_loc.vend_xref_id part_xfer.xref_no	N
35	Std Unit of Order	Unit of Measure	part_inv_loc.unit_order_v1	N
36	Pack Size	Pack size	part_inv_loc.pack_size	N
37	Std Order Quantity	Standard Quantity ordered	part_inv_loc.std_order_qty	N
38	Superseded by Part	Valid part number required	Parts.supsby_part_id	N
39	Superseded by Part Manufacturer	Valid manufacturer required	Parts.manufacturer	N
40	National Part	Y/N or Blank	National_part_fl	N
41	Active Flag	Y/N or Blank. Applies to Type 1 entries only. Type 2 or 3 will be ignored.	Parts.active_fl	N

Column	Column Name	Description	Maps to M5 Column	Required (Y/N)
		<p>If set to Y, it makes the part ACTIVE on Part Main Catalog.</p> <p>If set to N, it makes the part INACTIVE on Part Main Catalog.</p> <p>If Blank, the status remains unchanged.</p>		

Additional considerations:

- When the interface is run, each record in the file will be picked up and validated.
- If the type is 1, and the part does not exist, a new part master record will be created.
- If a new part record is being created, standard component validation would take place on each column value entered for the part.
 - For example, when creating a new part record, a part number is required and cannot be greater than 30 characters.
- If the type is 1, and the part exists, the part master record will be updated.
- If the type is 2, the part inventory location catalog will be created.
- If a new location record is being created:
 - The type must be a value of 2.
 - A valid inventory location record must be specified.
 - The part must exist in the main catalog.
 - The part cannot already exist at the inventory location specified.
- If the type is 3, the part item information will be updated.
- If System Flag 5024 is set to Y, as is the default, a valid Part Manufacturer is required.
- If System Flag 5058 is set to Y, a valid ATA System code is required, N is the default.
- If part validation fails, a reject record will be created.

Conditions for columns 38-40:

- If either Superseded by Part No or Superseded by Part No MFG is blank while the other is supplied, the row will be rejected.
- In order to put any Superseded part information onto a part, that part needs to already be created in the system.
- If the Part No is not a valid Part in M5 it will be rejected.
- If the MFG is not a valid MFG it will be rejected.
- If the MFG on the Part in the file does not match the one on the Part in the system it will be rejected.
- If National Flag is anything other than Y, N, or Blank it will be rejected.
- All of these situations only happen if the Type = 1, otherwise they are skipped, even if they are supplied.

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
77032	M5-STD-PART-INTF	Scheduled	04/09/2020 12:22:07		Once	N	

Schedule Details

Run Interval: Once

Exclude weekends and holidays: ☐

First execution date/time:

Schedule / Reschedule

Schedule Details

Schedule Details

Run Interval:

Exclude weekends and holidays: ☒

First execution date/time:

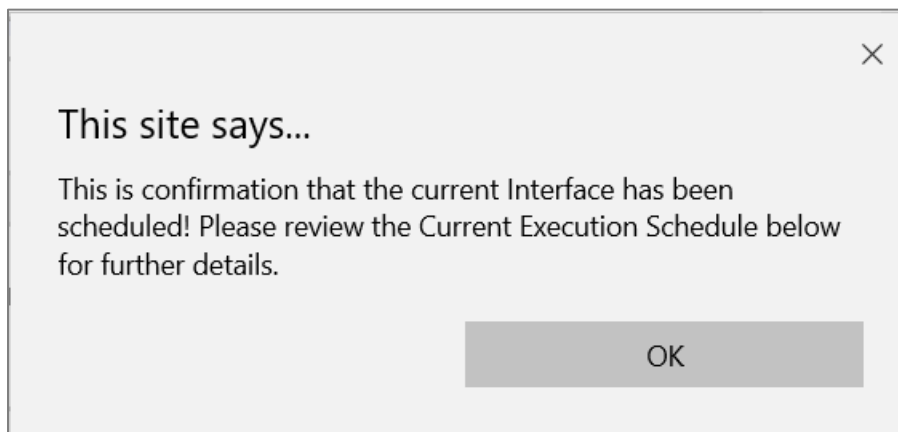
Schedule / Reschedule

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.
- Enter a **First Execution Date/Time** from which the run interval value should apply.

4. When finished, select the **Schedule/Reschedule** button.

You will receive the following message:



The scheduled run appears on the **Current Execution** i-frame. It can also be viewed on the System Run List of Jobs frame.

To view interface rejects, refer to the Interface Reject Manager frame.

Interface Reject Manager

To view rejects for the Standard Part Upload interface, navigate to the Interface Reject Manager frame.

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Interface Reject Manager

Interface:

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Standard Part Upload Interface

Interface Statistics (Loaded 6 records)

Stat ID	Run Date	Total Processed	Pass	Fail	Successful Reprocess	Elapsed Time In Hrs.

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

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Interface Reject Manager

Interface:

Standard Part Upload interface

Interface Statistics (Record 33 of 40)

Stat ID	Run Date	Total Processed	Pass	Fail	Successful Reprocess	Elapsed Time In Hrs.
77938	09/11/2017 15:07:37	1	1	0	0	0.00
77823	03/29/2017 07:35:37	2054	18	2036	0	0.04
77813	03/21/2017 07:14:35	1	0	1	0	0.00
77812	03/21/2017 06:57:39	38	2	36	0	0.00

Interface Rejects (Loaded 36 records)

Resubmit	Error Stat ID	Msg No	Type	Location	Part No	Manufacturer	Description	New/Used /Rebuilt	Unit Cost	SysCode	Component	ATA Part	Valid System on Job
<input type="checkbox"/>	77812	999	1	FM				Rebuilt					No
<input type="checkbox"/>	77812	999	1	FM				Rebuilt					No
<input type="checkbox"/>	77812	999	1	FM				Rebuilt					No
<input type="checkbox"/>	77812	999	1	FM				Rebuilt					No
<input type="checkbox"/>	77812	999	1	FM				Rebuilt					No

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 on 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: 992 – PART DESCRIPTION exceeds maximum length of 30.
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.