

IndustrySafe Corrective Action Data Import Specifications

Revision 2 – 1/1/2018

1 Client Tasks

Field Requirements

- The client will create a Tab Delimited file containing all of the following fields:

Order	IndustrySafe Label	IndustrySafe Column Name(s)	Data Type	Required	Data Restrictions / Requirements
1.	Corrective Action Number	CA_ID_PK, CA_HISTORIC_ID	Text		Only letters, numbers, dashes, underscores, and periods are allowed. No spaces or other special characters are allowed. This number may be either the IndustrySafe corrective action System ID or a client generated corrective action number. If a matching System ID or Client Corrective Action Number is found that corrective action will be updated with the information from the import file.
2.	Originating Type	CA_TYPE	Text (Drop Down)		Allowed Values: Unlinked, Hazard, Incident, Inspection, Observation Default to Unlinked

Order	IndustrySafe Label	IndustrySafe Column Name(s)	Data Type	Required	Data Restrictions / Requirements
3.	Originating System ID	CA_FK	Text		Must match an existing IndustrySafe Incident Number, Inspection Number, Hazard Number, or Observation Number.
4.	Source	CA_SOURCE	Text (Drop Down)		[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
5.	Date Identified	CA_DATE	Date		Any Date: MM/DD/YYYY Default to current date.
6.	Facility	CA_LOCATION_FIXED	Text (Drop Down)	Yes	Value must match the name of an existing facility in the Facility Profile (exact matches only). The Business Group, Region, and Division fields will automatically be populated based on the Facility.
7.	Section	CA_SECTION	Text (Drop Down)		[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
8.	Location	CA_LOCATION	Text (Drop Down)		[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
9.	Investigator (email or name)	CA_INVESTIGATOR	Dropdown		Must match the email address or full name of an existing IndustrySafe user whose user level has been assigned the Investigator User Role.

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10.	Department	CA_DEPT	Text (Drop Down)		[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
11.	City	CA_CITY	Text		
12.	State	CA_STATE	Text (Drop Down)		Must be a valid two-character US State abbreviation (E.g. PA)
13.	Detailed Location	CA_LOCATION_DETAILED	Text Area		
14.	Problems/Description	CA_DESCRIPTION	Text Area	Yes	
15.	Recommendation	CA_RECOMMENDATION	Text Area		
16.	Notes/Comments	CA_COMMENTS	Text Area		
17.	Department Responsible	CA_DEPT_RESP	Text (Drop Down)		[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
18.	Responsible Party (email or name)	CA_MANAGER	Text (Drop Down)		Must match the email address or full name of an existing IndustrySafe user whose user level has been assigned the Responsible Party User Role.
19.	Phone Number	CA_PHONE	Text		
20.	Second Level Responsible Party (email or name)	CA_MANAGER_2	Text (Drop Down)		Must match the email address or full name of an existing IndustrySafe user whose user level has been assigned the Responsible Party User Role.

Order	IndustrySafe Label	IndustrySafe Column Name(s)	Data Type	Required	Data Restrictions / Requirements
21.	Third Level Responsible Party (email or name)	CA_MANAGER_3	Text (Drop Down)		Must match the email address or full name of an existing IndustrySafe user whose user level has been assigned the Responsible Party User Role.
22.	Estimated Start Date	CA_EST_START_DATE	Date		Any Date: MM/DD/YYYY
23.	Estimated Completion Date	CA_COMPLETE_DATE	Date		Any Date: MM/DD/YYYY
24.	Actual Completion Date	CA_ACTUAL_DATE	Date		Any Date: MM/DD/YYYY
25.	Status	CA_STATUS	Text (Drop Down)		Allowed Values: Open, Complete Default to Open
26.	Corrective Action Taken	CA_ACTION	Text Area		
27.	Estimated Cost	CA_COST	Currency		[Any Number, Up to Two Decimal Places]

File Requirements

- The file name must match a predefined value as agreed upon by the client and IndustrySafe.
- The file must contain all fields identified in the table above in the order specified.
- Any non-required field which the client does not want to import must be either blank or null.
- All blank or null fields in the import file will be set to null in the database.
- All Text fields are limited to 255 Characters. Longer values will be rejected.
- All Text Area fields are limited to 4,000 Characters. Longer values will be truncated.
- All dates should be formatted as MM/DD/YYYY
- The client will transfer this file via Secure File Transfer Protocol (sFTP or SSH File Transfer Protocol) to the IndustrySafe server (Server Address, User Name and Password to be provided by IndustrySafe).
 - Re: sFTP, see RFC 4253 (<https://tools.ietf.org/html/rfc4253>)
 - There are many sFTP clients to perform the task of transferring the file to the IndustrySafe server. One client application that we recommend is FileZilla (<http://filezilla-project.org>). This client is simple to use, free, and allows command prompt access to fully automate the process on a scheduled basis.
 - A file can only be uploaded after the previous file has been processed by IndustrySafe.

2 IndustrySafe Tasks

- IndustrySafe will setup a sFTP site server folder. This site will utilize the standards for file security according to sFTP (see RFC 4253 <https://tools.ietf.org/html/rfc4253>)
- IndustrySafe will automatically monitor the sFTP site server folder for new files. When a new file is found, the server will automatically begin processing the file.
- Each record in the client-supplied file will be processed as follows:
 1. Data will be validated for proper format (such as dates in date format). Any records that fail the data validation will be rejected, with the reason entered in the data import log.

2. The Corrective Action Number will be validated.
 - a. If the Corrective Action Number field is left blank a new corrective action will be created and an IndustrySafe Corrective Action System ID will be generated.
 - b. If the Corrective Action Number field is not left blank, the value will be checked against the IndustrySafe and client generated corrective action numbers for existing corrective actions.
 - i. If a match is found, the corresponding corrective action will be updated with the information contained in the import file.
 - ii. If a match is not found, a new corrective action will be created. The corrective action number provided in the file will be stored as the client generated corrective action number and an IndustrySafe corrective action system ID number will be generated.
3. The value in the import file for Facility must match the name of an existing facility in IndustrySafe. The Business Group, Region, and Division fields will automatically be populated based on the Facility.
4. For the Investigator and Responsible Party fields, the value in the import file must match the email address or full name of an existing IndustrySafe user whose user level has been assigned the corresponding user role (Investigator or Responsible Party).
5. For the following drop down fields, if a match is not found in IndustrySafe, a new drop down value will be created:
 - a. Source
 - b. Section
 - c. Location
 - d. Department
6. The standard IndustrySafe automatic email alerts will be sent when corrective actions are added using this import service. The same rules apply as when corrective actions are added using the corrective action recording form.

- IndustrySafe has provided a data import log report in system functions for the client to view the results of each import, including the number of incidents added, the number of existing incidents updated, and the number of incident records that failed. The report will list also list all records that failed and the error message, all new records inserted, and all records that were not updated.
- IndustrySafe will archive up to 10 completed files. Archived files will be deleted on a rolling basis.

Data import specifications for employee, location, and other data is available upon request.