IndustrySafe Inspection Data Import Specifications

Version 2 - 1/09/2013

1   Client Tasks

Field Requirements

- The client will create a Tab Delimited file containing a single header row and at least one data row containing all of the following columns:

Column Number	Column Header	Data Type	Required	Data Requirements
1	Client Inspection ID	Text	No	Only letters, numbers, dashes, underscores, and periods are allowed. No spaces or other special characters are allowed. If a matching Client inspection ID is found that inspection will be updated with the information from the import file. If the value does not match the requirements above, the record will be rejected.
2	Checklist Table	Text	No	Set the value of this field to either AUDIT_CHECKLISTS or OSHA_CHECKLISTS. If this field is left blank, AUDIT_CHECKLISTS will be used by default.
3	Checklist	Text	Yes	[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
4	Subpart	Text	No	[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
5	Topic	Text	No	[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
6	GPS Location	Text	No	
7	Facility	Text	Yes	Must match either a Facility Name (SYSC_FACILITY) or Facility System ID Number (SYSC_ID_PK). If a match is not found, this field will be left blank when the record is imported into IndustrySafe and the following will be added to the comments field: "Error - Invalid Facility: [value from file]".
8	Section	Text	No	[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.

Column Number	Column Header	Data Type	Required	Data Requirements
9	Location	Text	No	[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
10	Department	Text	No	[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
11	Investigator	Text	No	Value must match the Employee ID, email address, "First Name Last Name", or System ID of a user in the IndustrySafe User Table (exact matches only). If a match is not found, or if this field is blank, it will be set to "Mobile User' when the record is imported into IndustrySafe and the following will be added to the comments field: "Error - Invalid Investigator: [value from file]".
12	Date	Date	Yes	Any Date: MM/DD/YYYY If the value is not a valid date, this field will be left blank when the record is imported into IndustrySafe and the following will be added to the comments field: "Error - Invalid Date: [value from file]"
13	Time	Time	No	[Any Time]
14	Manager	Text	No	Value must match the Employee ID, email address, "First Name Last Name", or System ID of a user in the IndustrySafe User Table (exact matches only). If a match is not found, this field will be left blank when the record is imported into IndustrySafe and the following will be added to the comments field: "Error - Invalid Manager: [value from file]".
15	Phone	Text	No	
16	Detailed Location	Text Area	No	
17	Comments	Text Area	No	
18	Status	Text	No	Only Values form the Status Drop Down on the Inspection Form or their corresponding system ID are allowed: Open (1) Scheduled (3) Complete (2)

Column Number	Column Header	Data Type	Required	Data Requirements
19, 21, 23, 25+	The column heading for the status of inspection checklist items must contain the text "IAC_STATUS-" and the IndustrySafe System ID of the checklist item, for example IAC_STATUS-1234 If the checklist item does not exist in IndustrySafe, the entire inspection record will be rejected. For each item in the checklist, there must be a column for the status, immediately followed by a column for the comments.	Text	No	Add a column for the status of each checklist item, immediately followed by a column for the comments. The status value for each checklist item must match one of the checklist item status values in the drop down in IndustrySafe. The default values are listed below: OK (1) Deficient (2) N/A (4) If a match is not found or the value is left blank, the status will be set to the IndustrySafe Default: N/A (4)
20, 22, 24, 26+	The column heading for the comments for inspection checklist items must contain the text "IAC_COMMENTS-" and the IndustrySafe System ID of the checklist item, for example IAC_COMMENTS-1234 If the checklist item does not exist in IndustrySafe, the entire inspection record will be rejected. For each item in the checklist, there must be a column for the status, immediately followed by a column for the comments.	Text	No	Immediately after the column for the status of each checklist item, add a column for the comments.
	CA_RECOMMENDATION-1 (change 1 to 2, 3, 4, etc. for additional corrective actions).	Text	No	[Any] If a value for the Recommended Corrective Action is entered, it will be used to create a corrective action linked to the inspection.

File Requirements

- The file name must match a predefined value as agreed upon by the client and TRA.

- Two columns must be added for each item in the checklist. The first column must be the checklist item status and the second column must be the checklist item comments.

- The column heading for the checklist item status should be "IAC_STATUS-" followed by the IndustrySafe System ID for the checklist item (i.e. IAC_STATUS-1234).

- The column heading for the checklist item comments should be "IAC_COMMENTS-" followed by the IndustrySafe System ID for the checklist item (i.e. IAC_COMMENTS-1234).

- 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.

- All Textarea 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 FTP (over TLS/SSL, also known as FTPS) to the IndustrySafe server (Server Address, User Name and Password to be provided by TRA).

  - Re: FTPS, see RFC 4217 (http://tools.ietf.org/html/rfc4217)

  - There are many FTPS 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 TRA Tasks

- TRA will setup an FTPS site server folder. This site will utilize the standards for file security according to FTPS (see RFC 4217 (http://tools.ietf.org/html/rfc4217)

- IndustrySafe will automatically monitor the FTPS site server folder for new files. When a new file is found, the server will automatically begin processing the file.

- Each record in the data file will be processed as follows:

    1. Data will be validated for proper format (such as dates in date format).

    2. The Client Inspection ID Number will be validated.

        a. If the Client Inspection ID field is blank a new inspection record will be created and an IndustrySafe System ID number will be generated.

        b. If the Client Inspection ID field is not blank, the value will be checked against the Client Inspection ID numbers for existing inspections.

            i. If a match is found, the corresponding inspection record will be updated with the information contained in the import file.

            ii. If a match is not found, a new inspection record will be created. The Client Inspection ID value provided in the data file will be stored as the Client Inspection ID and an IndustrySafe 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. If a match is not found, this field will be left blank when the record is imported into IndustrySafe and the following will be added to the comments field: "Error - Invalid Facility: [value from file]". The Business Group, Region, and Division fields will automatically be populated based on the Facility.

    4. For the following drop down fields, if a match is not found in IndustrySafe, a new drop down value will be created:

        a. Section
        b. Location
        c. Department

- TRA has provided a data import log report in system functions for the client to view the results of each import, including the number of records added, the number of existing records updated, and the number of 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.

- TRA will keep an archive of files imported in the past 14 days. Archived files will be deleted on a rolling basis.

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