IndustrySafe Observation Data Import Specifications

Version 3 - 11/15/2016

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 fields:

Order	IndustrySafe Label / Column Header	Data Type	Required	Data Requirements
1	Client Observation ID	Text	No	Only letters, numbers, dashes, underscores, and periods are allowed. No spaces or other special characters are allowed. If a matching Client Observation ID is found that observation 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	Text	No	[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
3	Observer Employee ID	Text	No	Value must match an existing Employee ID in the Employees 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 Observer Employee ID: [value from file]".
4	Other Observer(s)	Text	No	
5	Facility	Text	Yes	Must match either project number 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]".
6	Section	Text	No	[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
7	Location	Text	No	[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
8	Date of Observation	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]"
9	Time of Observation	Time	No	[Any Time]
10	Length of Observation	Text	No	[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.

Order	IndustrySafe Label / Column Header	Data Type	Required	Data Requirements
11	Observation Contact Employee ID	Text	No	Value must match an existing Employee ID in the Employees 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 Observation Contact Employee ID: [value from file]".
12	Comments or Follow-Up Actions	Text Area	No	
13	Document1 Subcategory ID	Text	No	This value will be added to the value provided in the following field and used for the supporting document name in IndustrySafe.
14	Document1 Name (Document1Field)	Text	No	Document Title/Name of the first file to attach to the observation record (i.e. Observation Card Image). If this field is left blank or set to "Yes", the file name will be used.
15	Document1 Path (Document1File)	Text	No	Relative path to first file to attach to the observation record (i.e. images\photo1.jpg)
16	Document2 Subcategory ID	Text	No	This value will be added to the value provided in the following field and used for the supporting document name in IndustrySafe.
17	Document 2 Name (Document2Field)	Text	No	Document Title/Name of the second file to attach to observation record (i.e. Observation Comments Image). If this field is left blank or set to "Yes", the file name will be used.
18	Document2 Path (Document2File)	Text	No	Relative path to the second file to attach to observation record (i.e. images\photo2.jpg)
19+	Column Heading Value: Category ID and Subcategory ID Column Values: Safe Act (Digit 1), Unsafe Act (Digit 2), Safe Condition (Digit 3), Unsafe Condition (Digit 4), Follow-Up Required (Digit 5), Severity Potential (Digit 6), Agree/Disagree (Digit 7) *See Data Requirements for Actual Column Heading Specifications*	Column Heading: Text Column Value: 7-Digit Integer (including leading zeros)	No	Add a column for each checklist item. The column heading must contain the Client IDs of the category and sub category separated by two vertical lines (i.e. A.PPE||A.1.Gloves). If the Category or Subcategory do not exist in IndustrySafe, new values will be created and the ID provided will be used for both the name and the client ID. The value for each checklist item should be a five digit integer, including leading zeros. Each digit corresponds to a separate column in the IndustrySafe Observation Checklist. Digit 1: Safe Act Digit 2: Unsafe Act Digit 3: Safe Condition Digit 4: Unsafe Condition Digit 5: Follow Up Required Digit 6: Severity Potential Digit 7: Area of Observation For the Safe/Unsafe fields (Digits 1 - 4), if the value of the corresponding digit is Zero, the field will be left blank in IndustrySafe, otherwise the field will be populated with the digit.

Order	IndustrySafe Label / Column Header	Data Type	Required	Data Requirements
				For the Follow-Up Required field (Digit 5), if the value of the corresponding digit is 1 the field will be set to No in IndustrySafe, if it is 2 the field will be set to Yes, otherwise the field will be left blank. For the Severity Potential and Area of Observation fields, the System ID of the item from the list in IndustrySafe must be specified (1, 2, 3, 4, 5, 6, 7, 8, or 9)
Third to Last Column	PAGE_IMAGES	Text	No	Relative path to an image of the full page scan of the observation card to attach to observation record (i.e. images\observation_card.jpg). In IndustrySafe, this supporting document will be given the name "Observation Card Image"
Second to Last Column	Department	Text	No	[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.
Last Column	Trade	Text	No	[Any] If a match is not found in the existing IndustrySafe look-up table, a new value will be created.

File Requirements

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

- The file must contain all fields identified in the table above in the order specified.

- A column should be added for each item in the checklist. Each observation must contain at least one checklist item.

- The header row value for each checklist item must contain the category and subcategory for the item separated by two vertical lines (i.e. PPE||Gloves).

- 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 Observation Number will be validated.

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

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

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

            ii. If a match is not found, a new observation record will be created. The Client Observation ID value provided in the data file will be stored as the Client Observation 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. The value in the import file for Observer Employee ID must match the Employee ID of an existing employee record 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 Observer Employee ID: [value from file]".

5. The value in the import file for Contact Employee ID must match the Employee ID of an existing employee record 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 Observer Employee ID: [value from file]".

6. The value in the header row for each checklist item must contain the client IDs for the category and subcategory for the item separated by two vertical lines (i.e. A.PPE||A.1.Gloves). If the category value does not exist in IndustrySafe, a new value will be created. The ID provided will be used for both the name and the client ID. If the subcategory value does not exist in IndustrySafe within the category specified, a new value will be created. The ID provided will be used for both the name and the client ID.

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

    a. Length of Observation
    b. Section
    c. Location
    d. Department
    e. Trade
    f. Category
    g. Subcategory

8. Up to two supporting document files may be attached to an observation record. If the path to a document is specified (columns 13 and 15) and the document exists, the document will be attached to the observation record as a supporting document.

- 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.