

IndustrySafe Training Data Import Specifications

Version 5 – 04/29/2014

1 Client Tasks

Field Requirements

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

| Order | IndustrySafe Label | Data Type | Required | Data Requirements |
|-------|---------------------------------------|------------------|----------|--|
| 1 | Employee ID or Employee email address | Text | Yes | Must match an existing Employee ID in the Employees table or an existing employee's email address. If no match is found, the record will be rejected. |
| 2 | Client Class ID | Text | No | If a value is provided for the Client Class ID and a matching Client Class ID is not found in the Class Catalog in IndustrySafe, the record will be rejected. |
| 3 | Class Name | Text | Yes | If a value is NOT provided for the Client Class ID and a matching Class Name is not found in the Class Catalog in IndustrySafe, the record will be rejected. |
| 4 | Training Class Category | Text | | This field is not required and is only used for testing purposes. |
| 5 | Retraining Cycle | Text | | This field is not required and is only used for testing purposes. |
| 6 | Class Schedule - Facility | Text | Yes | Must match either a Facility Name (SYSC_FACILITY) , Facility System ID Number (SYSC_ID_PK) or Facility Client ID (SYSC_CLIENT_ID) |
| 7 | Date Assigned | Date | | Any Date: MM/DD/YYYY - Will Default to Start Date if Left Blank. |
| 8 | Start Date | Date | Yes | Any Date: MM/DD/YYYY |
| 9 | Start Time | Date | | Any Time |
| 10 | End Date | Date | Yes | Any Date: MM/DD/YYYY |
| 11 | Instructor Employee ID | Text | | If an instructor with a matching Employee ID is not found a new Instructor will be added. |
| 12 | Session Notes | Text | | If this field is left blank, the field will not be updated in IndustrySafe. If it is not blank, the value in this field will replace the value in the field on the class schedule form. |
| 13 | Attended Class | Text (Drop Down) | | No (1) or Yes (2) Will default to Yes if left blank. |
| 14 | Hours Attended | Number | | If this field is left blank and Attended Class is set to Yes, then the number of hours will be populated with the sum of the Hours - Field and Hours - Classroom fields in the Class Catalog record for the class. |
| 15 | Pass Class | Text (Drop Down) | | No (1) or Yes (2) Will default to Yes if left blank. |

| Order | IndustrySafe Label | Data Type | Required | Data Requirements |
|-------|--------------------|------------------|----------|---|
| 16 | Grade Received | Text (Drop Down) | | No (1) or Yes (2) |
| 17 | Grade | Text | | [Any] |
| 18 | Date Attended | Date | | Any Date: MM/DD/YYYY |
| 19 | Next Required Date | Date | | Any Date: MM/DD/YYYY Next Required Dates are automatically calculated in IndustrySafe using the Retraining Cycle. For classes where the Retraining Cycle is set to "As Needed", a Next Required Date may be specified here. If this field is left blank, the Next Required Date in IndustrySafe will not be changed. |

File Requirements

- The name of the data file must match a predefined value as agreed upon by the client and TRA.
- The data 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 data file will be set to null in the IndustrySafe database.
- All text fields are limited to 255 Characters.
- All dates should be formatted as MM/DD/YYYY
- Column headings should **NOT** be included with the file.
- 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 new data file can only be uploaded after the previous file has been processed by IndustrySafe.

2 TRA Tasks

- TRA will setup a 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 sweep the FTPS site server folder for new data files. When a data 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). Any records that fail the data validation will not be imported and display as a failed record in the data import log.
 2. If the Client Class ID value is NOT blank, the value will be used to find a matching Client Class ID in the Class Catalog in IndustrySafe. If a match is NOT found, the record will be rejected.
 3. If the Client Class ID value is blank, the Class Name value in the will be used to find a matching Class Name in the Class Catalog in IndustrySafe. If a match is NOT found, the record will be rejected.
 4. All training records with the same Client Class ID (or Class Name if no ID is provided), Start Date, End Date, and Facility will be assigned to the same class schedule record in IndustrySafe.
- 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 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 disabled.
- TRA will archive up to 10 completed files. Archived files will be deleted on a rolling basis.

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