

# IndustrySafe User Data Import Specifications

Revision 3 – 04/29/2014

## 1 Client Tasks

### Field Requirements

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

Order	IndustrySafe Label	IndustrySafe Column Name	Data Type	Required	Data Requirements
1	User Login ID	US_USER	Text	YES	Email address format
2	Employee ID	US_EMPLOYEE_ID	Text	YES	Must match an existing Employee ID in the Employee's Table
3	Business Group	US_BUSINESS_GROUP	Text		See note on Hierarchy
4	Region	US_REGION	Text		See note on Hierarchy
5	Division	US_DIVISION3	Text		See note on Hierarchy
6	Facility	US_FACILITY	Text		See note on Hierarchy
7	User Level	US_ULEVEL	Text	YES	[Any Valid User Level]
8	Status	US_STATUS	Number		0 = active, 1 = disabled
9	Email Address	US_EMAIL	Text		Email address format

### Note on Hierarchy

- When specifying a specific User Level, Business Group, Region, Division, or Facility, you can use either the number, the client id or the name found in the hierarchy report. TRA recommends you use the number since the names may not be unique.
- If the value for Business Group, Region, Division, or Facility is either 0, ALL, or left blank, the import routine will interpret that to mean the ALL case on the user form.
- The Hierarchy fields are Business Group (level 1), Region (level 2), Division (level 3) and Facility (level 4).
- The algorithm for setting a users Hierarchy permissions is:
  - Starting with the lowest level check the value provided
    - If the value is either 0, ALL or blank, move up one level
    - Otherwise verify the value is valid
      - If the value is valid, set the users hierarchy to this level and do not look at the higher level hierarchy values
      - If the value is not valid, reject the data record and log in as a failure.
    - If all the levels are set to 0, ALL or left blank, the user is given full (ALL) access to all hierarchy levels.
- A report can be run which will list the valid Hierarchy values.

## **User Login ID**

- The User ID must be formatted as an email address with the agreed upon domain name. If the User ID does not match this format, the record will not be imported.

## **Employee ID**

- The Employee ID must match an existing Employee ID in the Employee's table. If the Employee ID does not match, the record will not be imported.
- The first and last name in the user table will be populated with the corresponding values in the employee table.

## **Email Address**

- If the user's email address is blank or null, the email address will be populated from the employee table based on the user's employee ID.

## **Password**

- When an existing user record is updated, the password is not changed.
- When a new record is added, a random password will be generated. An email is automatically sent to all new users containing their User Login ID and password, along with instructions for accessing the site. When a new user first logs into IndustrySafe they will be asked to change their password.
- Clients may specify a default password to be used for new users rather than the random password. TRA will set this as the default password and when a new user logs into IndustrySafe for the first time they will be asked to change their password.

## **User Licenses**

- At the start of the import process, the number of available new UserIDs will be calculated by subtracting the number of active users from the number of licensed users.
- As each data record is processed, the count is updated. For each new user, the number of available new UserID is decremented, and for each user changed from Active to Deactive the number of available new UserIDs is incremented. Updating a user without changing their status does not change the number of available new UserIDs.
- Once the number of available user licenses is zero, new users will be rejected and flagged with insufficient user licenses as the failure reason.

## 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.
- All blank or null fields in the import file will be set to 0 and processed as if a 0 had been entered.
- All text fields are limited to 255 Characters.
- 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 file can only be uploaded after the previous file has been processed by IndustrySafe.

## 2 TRA Tasks

- TRA will supply a report with valid User Level codes and valid Facility Codes.
- 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 updates. When an update is found, the server will automatically begin processing the file.
- When an update is found, each record in the client-supplied file will be processed as follows:
  1. The Data will be validated for proper format (such as the hierarchy is valid). Any records that fail the data validation will not be imported and display as a failed record in the audit report.
  2. The User ID will be checked against the existing database.

- a. If a match is found, the existing record will be updated with the user data from the import file.
  - b. If a match is not found, a new record will be created with the user data from the import file.
- 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 users added, the number of existing users updated, and the number of user records that failed. The report will 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.