

18.1. Using the importer

18.1.1. Create import file

Create the CSV file. For more information about the file structure please see:

- Bills of Materials: [Bills of Materials import file](#)
- Manufacturing Operations: [Manufacturing Operations import file](#)
- Production orders: [Production order import file](#)

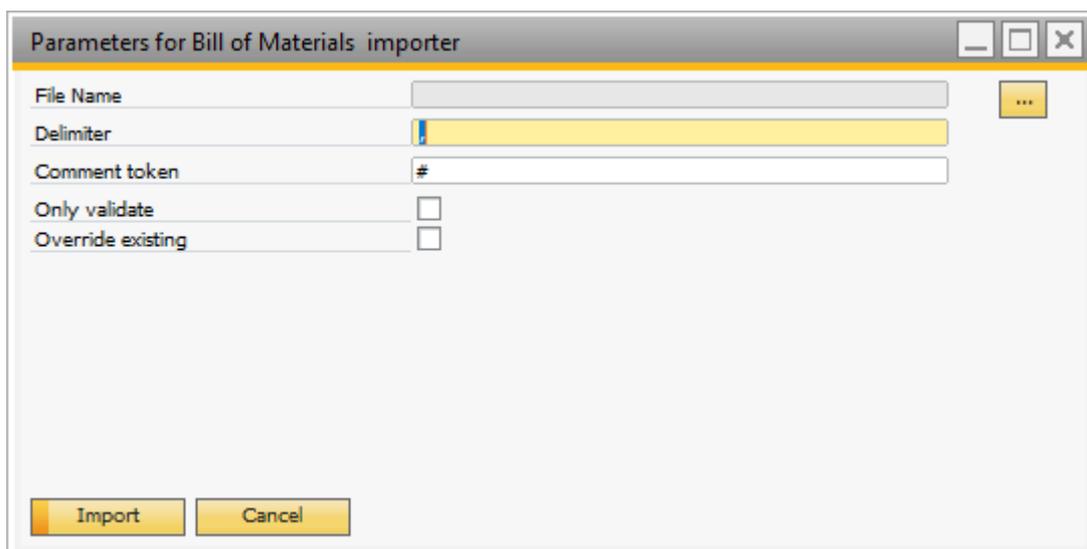
18.1.2. Open importer

Open the importer via the following path: Tools > Produmex Manufacturing > Produmex Data Management >

- To import Bills of Materials, click on: *Import Bills of Materials*
- To import Manufacturing Operations, click on: *Import Manufacturing Operations*
- To import Production orders, click on: *Import Production order*

18.1.3. Specify parameters

On the parameters form click on the '...' button and browse the CSV file.



Parameters for Bill of Materials importer

File Name	<input type="text"/>	...
Delimiter	<input type="text" value=" "/>	
Comment token	<input type="text" value="#"/>	
Only validate	<input type="checkbox"/>	
Override existing	<input type="checkbox"/>	

Import Cancel

Specify the importing parameters.

Delimiter

Specify the separator character that was used on the CSV file on the Delimiter field. The default delimiter is ','.

Comment Token

A Comment Token can be defined. Every row that begins with the comment token will be skipped. By default the comment token is '#'.
Please note: If you leave it empty, each line in the file will be processed.

Override existing

When importing a Bill of Materials or a Manufacturing operation, an additional 'Override existing' checkbox will be displayed. This parameter determines what the importer does when the Bill of Materials/Manufacturing Operation already exists.

- If it is checked, the existing document is deleted and replaced with the new one from CSV file. If there are many BoMs/Manufacturing Operations for the same product in the file, the last valid one will be loaded.
- If it is not checked, the existing documents remain intact, an error message is generated for the one in CSV file. If there are many BoMs/Manufacturing Operations for the same product in the file, the first valid one will be loaded.

Please note: Whenever a production order is imported, a new production order is added. The importer will not override existing production orders.

18.1.4. Validate

Before starting the import, validate the CSV file.

Check the 'Only validate' box. If this box is checked, the document will only be validated but will not be imported to the company database. Click on the 'Import' button to start the validation.

For more information about the validation steps please see: [Validation](#)

The results of the validation will be displayed on the result form.



On the header the path to the import file and the importing parameters are displayed.

Elements/documents included in the selected import file will be divided into three tabs:

- Documents/elements proven to be valid are listed on the 'Successfully loaded' tab.
- Documents/elements proven to be invalid due format errors are listed on the 'Format error' tab.
- Documents/elements proven to be invalid due content errors are listed on the 'Content error' tab.

The number of the grid elements is displayed next to the tab title.

When importing Bill of Materials or Production orders, the *Product Number* is the item code of the main product. When importing Manufacturing operations, the Product Number is the item code of the validated manufacturing operation.

The *Line Reference* is the number of the source line in the CSV file.

On the *Message* field further information are displayed about the entry.

18.1.5. Import

After every line of the import file is proven to be valid, start the import. It is recommended to only start the import after every line of the import file is proven to be valid. Make sure that the 'Only validation' checkbox is not checked.

Set the import parameters as described above and click on the 'Import' button to start the import. Please note: The system will always validate the file before the import, regardless of whether it was validated before or not.

The results of the import will be displayed on the results form.

- When importing a Bill of Materials, a link to the imported Bill of Material is added to the *Product Number* field.
- When importing a Manufacturing Operation, a link to the imported Manufacturing Operation is added to the *Product Number* field.
- When importing a Production Order, a link to the Bill of Material of the main product is added on the *Product Number* field. An additional *Document Number* field is displayed. The document number and a link to the generated production order is displayed on the field. All generated production orders will be in 'Planned' status, and their type will be 'Special'. The production order will always be created based on the imported data, regardless whether its main product has a production BoM or not.



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