

Importing data using the Produmex import tool

The import tool can be used to import elements through files to the Produmex system or to copy them directly from one database to another.

Import via files

1. Preparation

The CSV templates for the Produmex import tool can be found in the installation zip folder, in the Templates > Import Templates subfolder.

1.1. Zone

- Code: Zone code
- Name: Name of the zone
- Parentcode: Code of the warehouse the zone belongs to
- UseForZonePicking (Y/N): Can this zone be selected on the flow 'Zone picking'?

Fill in relevant data in the worksheet Zone and save the worksheet as a CSV file. The CSV file should look like this:

```
Code;Name;ParentCode;UseForZonePicking
Z1;Zone1;02;N
Z2;Zone2;02;Y
```

1.2. Bin

- Code: Scancode of the bin.
- Name: Name of the bin.
- Parentcode: The code of the structure element where the bin belongs to.
- Is Active (Y/N): Is the location active?
- IsDestinationForPicking (Y/N): Can the location be selected to put products on after a picking? Is the location a 'pick and hold' – location?
- CanBeLinedUp (Y/N): Can the location be lined up during a production proces (*mostly used for Tanks/Silo's*)
- IsPickLocation: Can the location be used to perform item picking?
- IsFixedItem (Y/N): Is the location a fixed picklocation?
- CanBeReplenished (Y/N): Can the location be replenished?
- AllowCountDuringCycleCount (Y/N): Is the location allowed to be counted?

- CountAfterNumberOfDays: The number of days after the location needs to be counted again.
- MaximumLogisticUnits: The maximum number of allowed logistic units.
- ItemStorageLocationType: Defines the item storage location type. The list of item storage location types is stored in the UDT PMX_ISLT.

Fill in relevant data in the worksheet Bin and save the worksheet as a CSV file. The CSV file should look like this:

```
Code;Name;ParentCode;IsActive;IsDestinationForPicking;CanBeLinedUp;Sequence;
IsPickLocation;IsFixedItem;CanBeReplenished;AllowCountDuringCycleCount;Count
AfterNumberOfDays;MaximumLogisticUnits;ItemStorageLocationType
E01A001;E01A001;Zone1;Y;N;N;100;Y;N;N;Y;;0;
A05A05;A05A05;Zone2;Y;N;N;120;Y;N;N;Y;;0;
```

1.3. BinItem

- ParentCode: The code of the Bin location.
- ItemCode: The item code.
- MinimumNumberOfItems: The minimum quantity of the item on the location. If the quantity falls below the minimum the system will generate a replenishment order.
- MaximumNumberOfItems: The maximum quantity the location can contain of the specified item on the specified location.
- NumberOfItemsToReplenish: Quantity that should be used to replenish a fixed picklocation.

Fill in relevant data in the worksheet Bin and save the worksheet as a CSV file. The CSV file should look like this:

```
ParentCode;ItemCode;MinimumNumberOfItems;MaximumNumberOfItems;NumberOfItemsT
oReplenish
E01A001;A0001;10;999;10
```

1.4. Customer Shelf life

- ItemCode: The item code.
- CardCode: The cardcode of the customer.
- CountryCode: The country code for this shelf life (optional).
- ShelfLifeInDays: Shelf life for the customer for the item.

Fill in relevant data in the worksheet Customer Shelf life and save the worksheet as a CSV file. The CSV file should look like this:

```
ItemCode;CardCode;ShelfLifeInDays
A006;K00001;94
```

1.5. Item zonetypes

- ItemCode: Item of the zone type
- ZoneTypeCode: The code of the [Zone Type](#). The Zone Type must exist in the organizational

structure of Produmex.

Fill in relevant data in the worksheet ZoneTypes and save the worksheet as a CSV file. The CSV file should look like this:

```
ItemCode;ZoneTypeCode
A006;C
```

1.6. Packaging types

- ItemCode: This itemcode must be known in SAP Business One
- PackagingTypeCode: The SAP UoM code.
- Quantity: The quantity of the inventory unit of measure
- BarcodeType: Fixed value. Possible values:
 - G: Use this value for a GTIN14 barcode type (System will do a check if it is a valid GTIN-14 barcode).
 - F: Use this value for a Free Barcode type (System will perform no check).
- Barcode: The Barcode of the Packaging Type.
- AskDuringReception:
 - N: The system will not ask the quantity in the packaging type during the reception process.
 - Y: The system will ask the quantity in the packaging type during the reception process.

Remark: if the item is not managed in batches, the system will not allow a 'Y' value in this field.
- HideDuringEnteringQuantity
 - N: The user cannot enter how much packaging types he is receiving.
 - Y: The user can enter how many packaging types he is receiving.

Fill in relevant data in the worksheet PackagingTypes and save the worksheet as a CSV file. The CSV file should look like this:

```
ItemCode;PackagingTypeCode;Quantity;BarcodeType;Barcode;AskDuringReception;HideDuringEnteringQuantity
ITEM02;BOX;12;G;12345678901231;Y;N
```

1.7. Item Batch Attributes

- Item code: The item code.
- BatchAttributeCode: The batch attribute code. This code should exist in the [PMX_BATT](#) UDT.
- ValueEntryOption: This will set whether the value should be asked during reception. Possible values:
 - Required: User will have to fill in the data.
 - Optional: User can skip entry of the data.
 - Hidden: This batch attribute will not be asked during reception.
- IsLinkedToBatch (Y/N): Is the batch attribute linked to a batch number?

Fill in relevant data in the worksheet Customer Shelf life and save the worksheet as a CSV file. The CSV file should look like this:

```
ItemCode;BatchAttributeCode;ValueEntryOption;IsLinkedToBatch
02004;COUNTRY_OF_ORIGIN;OPTIONAL;N
02004;MANUFACTURING_DATE;HIDDEN;N
```

02005;COUNTRY_OF_ORIGIN;REQUIRED;N

1.8. Box For WAS

- Code: The box code.
- Name: The box name.
- U_BoxType: The box type. The box type should exist in the [Box type for WAS](#) UDT.

Fill in relevant data in the worksheet Customer Shelf life and save the worksheet as a CSV file. The CSV file should look like this:

```
Code,Name,U_BoxType
C1,C1,BT1
C2,C2,BT2
```

1.9. Box Type For WAS

- Code: The code.
- Name: The name.
- U_BoxType: The box type.
- U_ItemCode: The item code.
- U_Quantity: The quantity of the item that can be stored in the given box type.
- U_DividerType: The divider type.
- U_CompartmentNr: The number of compartments a box has.

Fill in relevant data in the worksheet Customer Shelf life and save the worksheet as a CSV file. The CSV file should look like this:

```
Code;Name;U_BoxType;U_ItemCode;U_Quantity;U_DividerType;U_CompartmentNr
C1;C1;BT1;ITEM02;25;DIV1;3
```

1.10. Route Header

- Code: The code of the route template.
- Name: The name of the route template.
- Weekday: The code of the weekday.
- StandardLoadingDock: The loading dock assigned to the route template.

Fill in relevant data in the worksheet Customer Shelf life and save the worksheet as a CSV file. The CSV file should look like this:

```
Code;Name;Weekday;StandardLoadingDock
Test;Test route header;2;D2.1
Test2;Test2 route header;3;D2.1
```

1.11. Route Line

- ParentCode: The route template code.
- CardCode: The cardcode of the customer.
- Sequence: Defines the shipping order of the route.
- ShipToCode: The ship to code of the customer.

Fill in relevant data in the worksheet Customer Shelf life and save the worksheet as a CSV file. The CSV file should look like this:

```
ParentCode;CardCode;Sequence;ShipToCode
Test;C00002;1;Customer 2 B
Test2;C00001;2;Customer 1
Test2;C00002;1;Customer 2 B
```

1.12. Location PutAwayZones

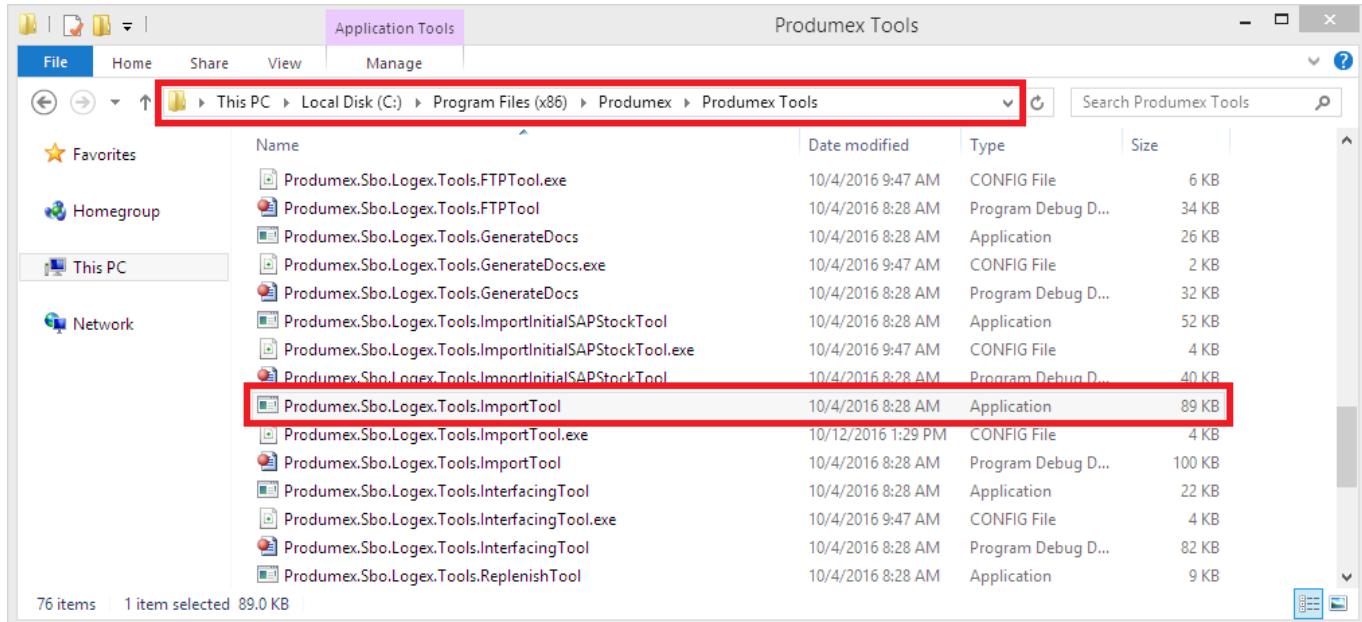
- ParentCode: The code of the parent structure element.
- PutAwayZone: The code of the put away zone.
- SortPickSequenceDescending (Y/N): Are the locations belonging to the put away zone sorted by the pick sequence descending?
- Sequence: The sequence number for the put away zone.
- BelongsTo (Y/N): Does the location belong to the put away zone?

Fill in relevant data in the worksheet Customer Shelf life and save the worksheet as a CSV file. The CSV file should look like this:

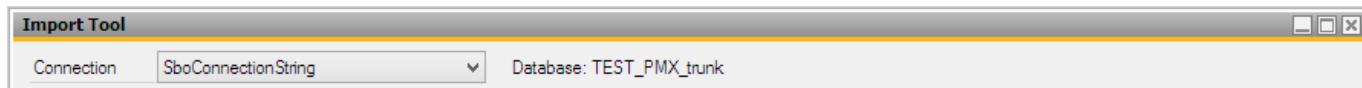
```
ParentCode;PutAwayZone;SortPickSequenceDescending;Sequence;BelongsTo
A11;Z1;Y;1;N
AA10;Z1;Y;2;N
AA10;Z4.1;Y;3;N
AA10;Z4;Y;4;N
```

2. Import tool

The import tool can be found in the installation folder of the Produmex tools:

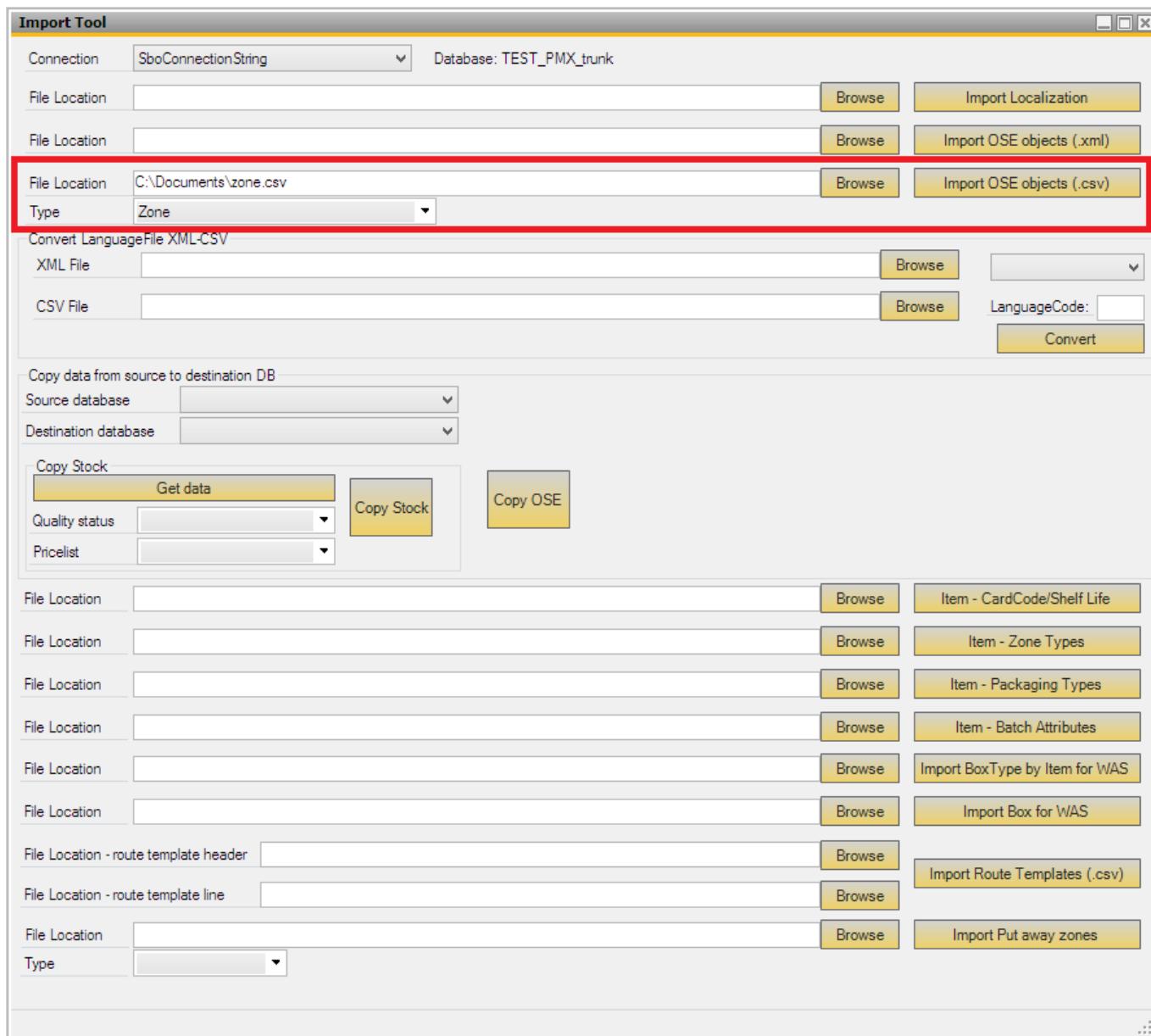


Launch the import tool by executing Produmex.Sbo.Logex.Tools.ImportTool.exe. To define the destination database, select a connection string from the 'Connection' dropdown list. The selected connection string will connect the database to the tool. After the connection string has been selected, the system displays the connected database.



2.1. Import Zones, Bins or BinItems

- 1. Browse to the CSV file and select the type in the 'Type' Combo Box.



- 2. Press the button 'Import OSE objects (.csv)'.
- 3. The application will show you that the import is finished at the bottom of the screen.

2.2. Import Customer Shelf lifes, Zone types, Packaging types, Item Batch Attributes, Box For WAS, Box type for WAS

- 1. Browse to the CSV file next to the corresponding button.

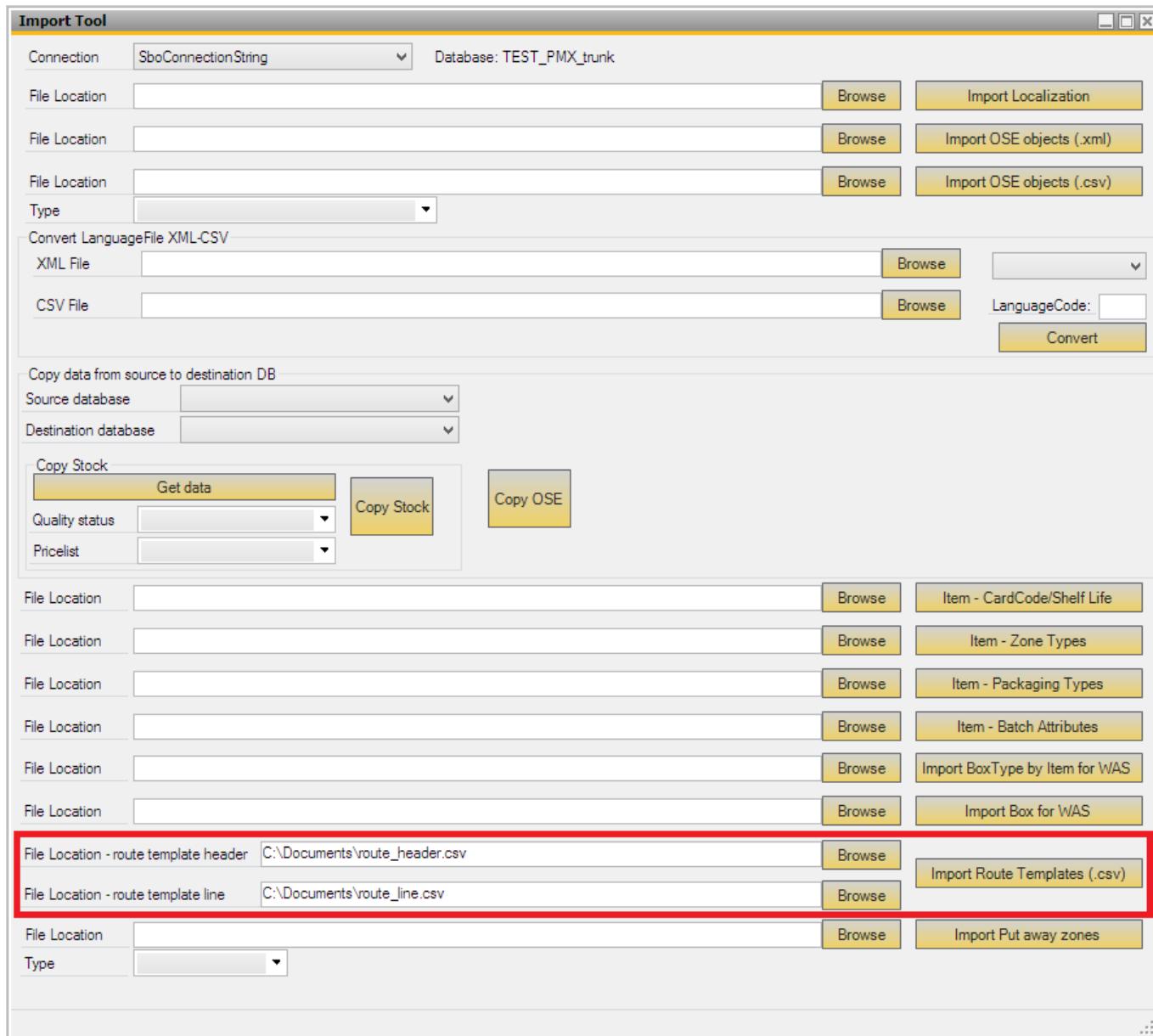
Import Tool

Connection	SboConnectionString	Database: TEST_PMX_trunk	Browse	Import Localization
File Location		Browse	Import OSE objects (.xml)	
File Location		Browse	Import OSE objects (.csv)	
Type		Browse		
Convert LanguageFile XML-CSV				
XML File		Browse		
CSV File		Browse	LanguageCode:	Convert
Copy data from source to destination DB				
Source database				
Destination database				
Copy Stock				
Get data		Copy Stock	Copy OSE	
Quality status				
Pricelist				
File Location		Browse	Item - CardCode/Shelf Life	
File Location		Browse	Item - Zone Types	
File Location	C:\Documents\packaging_types.csv	Browse	Item - Packaging Types	
File Location		Browse	Item - Batch Attributes	
File Location		Browse	Import BoxType by Item for WAS	
File Location		Browse	Import Box for WAS	
File Location - route template header		Browse	Import Route Templates (.csv)	
File Location - route template line		Browse		
File Location		Browse	Import Put away zones	
Type				

- 2. Click on the button.
- 3. The application will show you that the import is finished at the bottom of the screen.

2.3. Import RouteTemplate

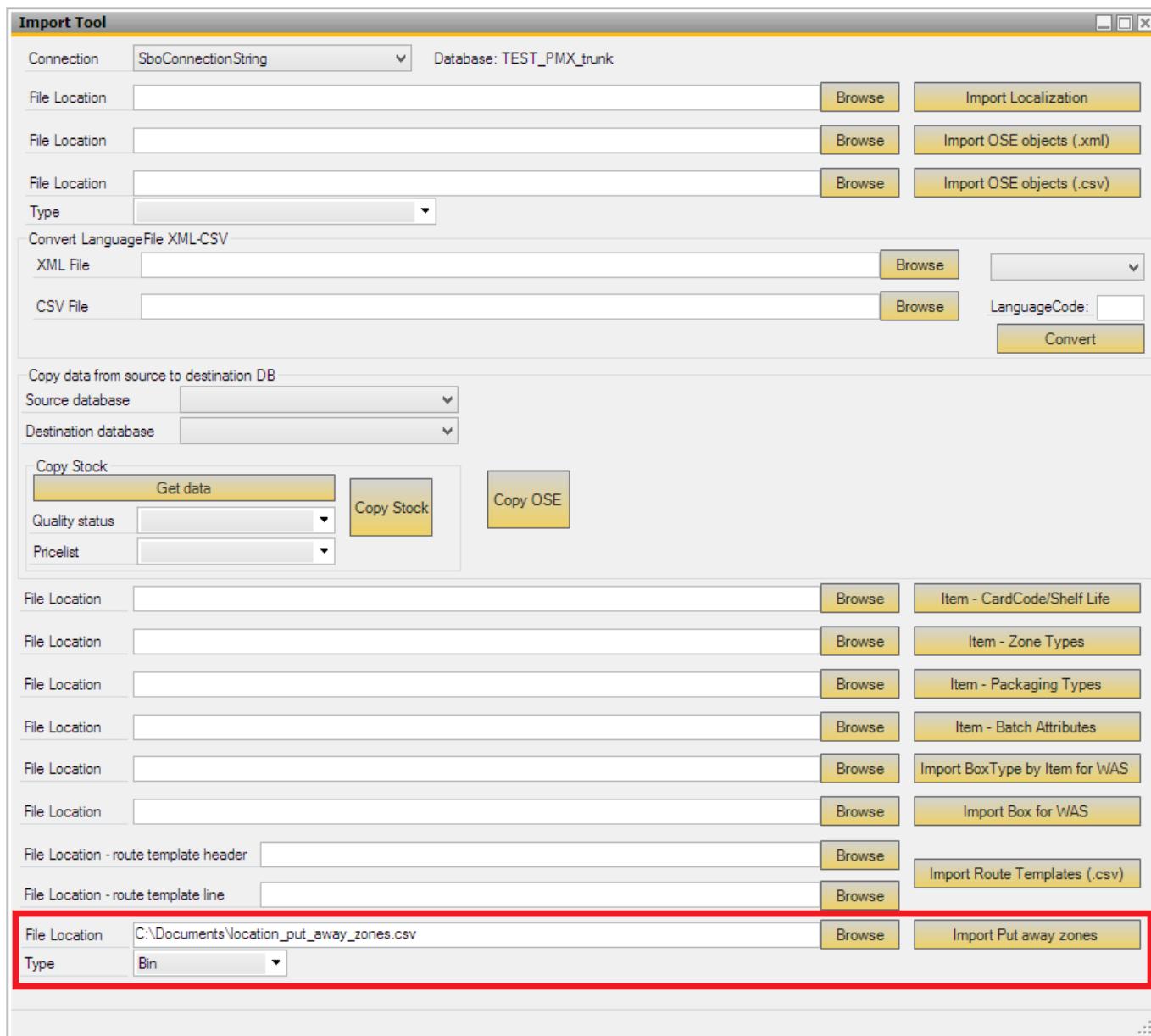
- 1. Browse the Route Header .csv file in the 'Route Template Header' field and browse the Route Line .csv file in the 'Route Template Line' field.



- 2. Click on the button 'Import Route Templates (.csv)'.
- 3. The application will show you that the import is finished at the bottom of the screen

2.4. Import Location PutAwayZones

- 1. Browse to the CSV file next to the button 'Import Put away zones'. Select the type from the 'Type' combobox.

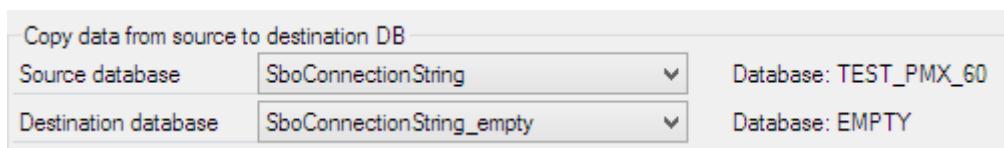


- 2. Click on the button 'Import Put away zones'.
- 3. The application will show you that the import is finished at the bottom of the screen.

Copy data

1. Select the source and destination database

Launch the import tool by executing Produmex.Sbo.Logex.Tools.ImportTool.exe. To define the source database, select a connection string from the 'Source database' dropdown list. To define the destination database, select a connection string from the 'Destination database' dropdown list.



The selected connection strings will connect the databases to the tool. After the connection string have been selected, the system displays the connected databases.

2. Copy

Press the 'Copy OSE' button to copy PMX created structure elements from the Organizational Structure of the source database and import them to the destination database.

3. Copy Stock

Click on the 'Get data' button. Then select a quality status from the 'Quality status' dropdown list. Every quality status defined for the database will be listed. Then select a price list from the 'Pricelist' dropdown list. Every price list will be listed. The selected quality status and price list will be applied to the stocks imported in the destination database. Press the 'Copy Stock' button to import the stock with the previously defined parameters from the source database to the destination database.

The screenshot shows the 'Import Tool' window with various configuration options for importing data from a source database (SboConnectionString) to a destination database (TEST_PMX_60). The 'Copy Stock' section is highlighted with a red box. It contains fields for 'Quality status' (set to RELEASED) and 'Pricelist' (set to Price List 01 (1)). Below this section are several 'File Location' fields with 'Browse' and 'Import' buttons, and other buttons like 'Copy OSE' and 'Convert'.

Copy data from source to destination DB	
Source database	SboConnectionString
Destination database	SboConnectionString_empty
Copy Stock <input type="button" value="Get data"/> <input type="button" value="Copy Stock"/> <input type="button" value="Copy OSE"/>	
Quality status	RELEASED
Pricelist	Price List 01 (1)
File Location	<input type="button" value="Browse"/> <input type="button" value="Item - CardCode/Shelf Life"/>
File Location	<input type="button" value="Browse"/> <input type="button" value="Item - Zone Types"/>
File Location	<input type="button" value="Browse"/> <input type="button" value="Item - Packaging Types"/>
File Location	<input type="button" value="Browse"/> <input type="button" value="Item - Batch Attributes"/>
File Location	<input type="button" value="Browse"/> <input type="button" value="Import BoxType by Item for WAS"/>
File Location	<input type="button" value="Browse"/> <input type="button" value="Import Box for WAS"/>
File Location - route template header	<input type="button" value="Browse"/>
File Location - route template line	<input type="button" value="Browse"/> <input type="button" value="Import Route Templates (.csv)"/>
File Location	<input type="button" value="Browse"/> <input type="button" value="Import Put away zones"/>
Type	<input type="button" value="..."/>

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