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User Guide

Parts Vendor Upload

CPVU

Notes

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Notes

Introduction

The Parts Vendor Upload (CPVU) application provides a way to update your main Parts Inventory database file with new and revised part information from any parts supplier.

Using a simple electronic spreadsheet file in comma-separated value (CSV) format and a connection between your ADP system and a desktop PC, CPVU allows you to create a map between the fields in the CSV file and the fields in the PART-NO file structure on your Parts application. When you run the Update command, CPVU matches the parts records in the CSV file to the part numbers in your database and modifies the database records with the new information from the vendor.

The CPVU application accelerates the process of updating parts data for smaller, specialized vendors that do not necessarily have a contract for generating and distributing online parts masters, such as would be used in the standard PMU function in the ADP Parts application.

Overview

This guide provides information for accessing, setting up, and using the features of the Parts Vendor Upload application.

Navigation

- Make sure that the Caps Lock feature is on.
- Use the arrow keys to move between fields.
- After typing data into a field, press **Enter** to move to the next field.
- Use **F1** to view the extensive online help.

Data File Requirements

This section describes the assumptions built into the CPVU application regarding the structure of the uploaded .CSV data file(s). CPVU requires the uploaded data files to have specific formatting characteristics so that they can be processed in a predictable manner.

To use Parts Vendor Upload effectively, you should have some familiarity with the column headings in the files you intend to upload. In some cases, you may also need a minimum amount of skill with the spreadsheet program used to open or generate the data files supplied by your parts vendor, in case you need to make a modified copy of the file before it is uploaded and processed by CPVU.

For complete information on how to use a spreadsheet program such as Microsoft Excel, refer to the user instructions supplied by that program's provider.

Reading and Managing a Data File

Use the information in this section if you need to review the contents of any parts vendor .CSV file you wish to upload.

To view a .CSV file, use your spreadsheet program (such as *Microsoft Excel*) to open it. A spreadsheet program can convert the comma-separated value (.CSV) format into a table with rows and columns, for your convenience in viewing the layout.

The first row in the .CSV file should be headings (labels) for each data column

The second and all subsequent rows should contain the parts data elements

1	Product	Description	2008 Price	COST	LIST
2	9510	RETAINING RING,(BEARING)	0.81	\$1.04	\$1.32
3	9516	SPLIT RING SEAL,(COMPRESSOR)	4	\$5.13	\$6.49
4	9749	GASKET,(TURBINE HOUSING)	1.55	\$1.99	\$2.52
5	9753	RETAINING RING,(BEARING)	1.96	\$2.51	\$3.18
6	9765	SPLIT RING SEAL,(COMPRESSOR)	3.4	\$4.36	\$5.52
7	9774	LOCKPLATE,(COMPRESSOR)	5.61	\$7.19	\$9.09
8	9779	LOCKWASHER,(COMP HOUSING)	1.39	\$1.78	\$2.26
9	9861	GASKET,(TURBINE HOUSING)	1.59	\$2.04	\$2.59
10	13002	GASKET,(TURBINE OUTLET)	16.16	\$20.71	\$26.20
11	15174	V BAND CLAMP,(COMPRESSOR)	14.2	\$18.20	\$23.03
12	15193	THRUST RING	18.89	\$24.21	\$30.63
13	18373	RETAINING RING,(HEAT SHIELD)	3.11	\$3.99	\$5.05

Figure 1. Vendor Data File (example)

The specific column heading names and their order may vary between parts vendors, but the format of the uploaded file must follow several rules:

- The first row (and the first row only) must contain labels for the column headings. CPVU uses these headings to map the data to your ADP Parts database fields.
- All rows after the first row must contain the parts data that matches the type indicated by the column heading. For example, a *Cost* column should contain numeric cost figures for each part.
- Each field in the rows of data must contain *only one value and only one type of data*. For example, the file should not combine the product number and the part description into a single column.

If you need to adjust the format or structure of the parts data file you received from your parts vendor, you can use your spreadsheet program to do so. *For instructions on spreadsheet commands, refer to the user guide supplied with that program.*

Remember that the file format used by CPVU is a comma-separated value (.CSV) format, not a spreadsheet format such as the default Excel file type (.XLS). Your spreadsheet program should contain a simple command that allows you to save a modified data file into .CSV format.

File Name Guidelines

As you begin to use Parts Vendor Upload on a regular basis, it may be an advantage to use consistent file names for each parts vendor.

For instance, you might use a naming convention that combines the overall data file type with the name of the supplier, such as *parts_list_garrett.csv*. Alternatively, if you know the files will be replaced on a regular basis, you could use a filename that includes information about the quarter or month in which the new file has arrived.

Avoid using an overly-generic filename such as *partsdata.csv*, which could apply to any vendor.

If you choose a consistent and logical set of unique filenames, you can keep them in a dedicated folder on your Windows PC, and upload each file from that folder when you create or update a field map setup.

Accessing CPVU

Follow these steps to access CPVU from the User Security Menu.

1. Log on to your Parts (*name-I*) account.

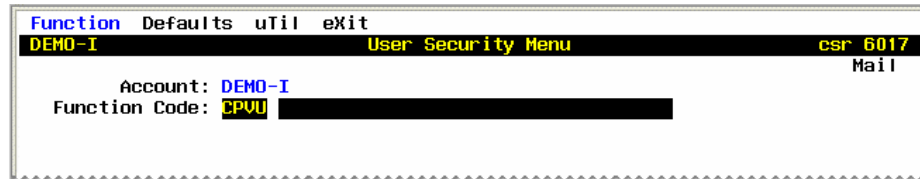


Figure 2. Application Account and CPVU Function Code

2. At the Function Code field, enter CPVU.



Figure 3. Parts Vendor Upload - Top Menu

3. At the CPVU menu, choose the option for the task you want to perform.

Managing Field Maps

Use the instructions in this section to define the field map setups that match the columns in your parts vendor data files to the fields in your ADP Parts database file (PART-NO).

You must create a field map for each vendor file you receive, when you first begin using the application. Your field map setups can then be used repeatedly for convenience, although you must use commands in the CPVU program to upload each new vendor file before you update the Parts database.

Creating a New Field Map

To set up a new vendor file field map:

1. Using your Reflection PC, follow the steps in *Accessing CPVU* on page 4 to launch the Parts Vendor Upload application.
2. At the top menu, select **Field Maps**.

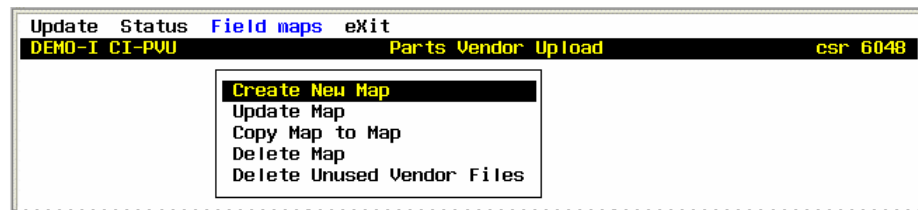


Figure 4. Field Maps Menu

3. Select **Create New Map**.

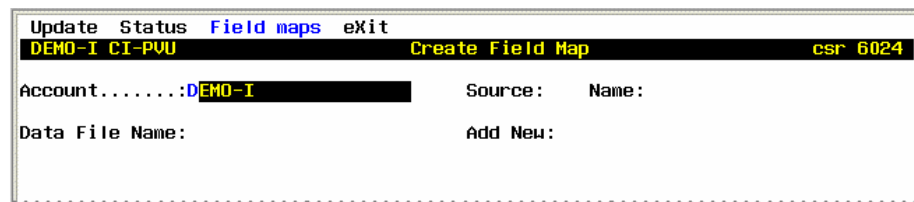


Figure 5. Create Field Map - Initial Screen

4. The Account field is automatically filled in with the current Parts logon name, but you can change it if you want to define a field map for a different logon. Type a new logon name, or use the **F12=List** command key to select one of the Parts logons on your system.
5. At the Source field, enter the number for a parts source, or use **F12** to choose a source from the selection list.
6. Enter a short descriptive name for this field map setup.
7. At the Data File Name field, press **F5=Upload**. This command opens a file navigation window on your Reflection PC.

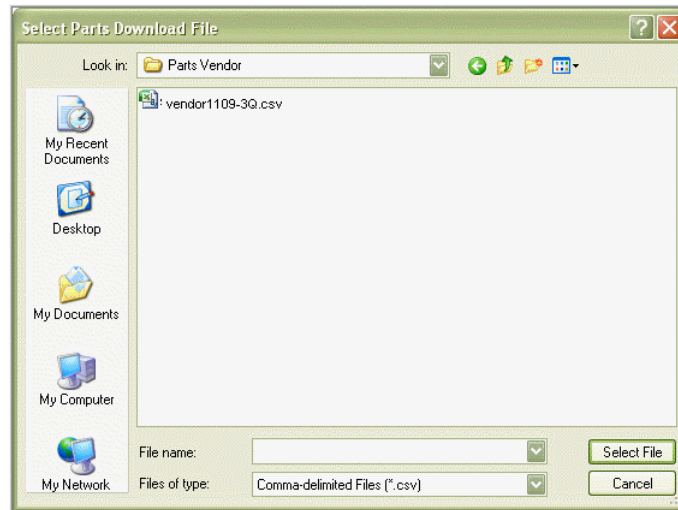


Figure 6. Windows Explorer

8. Use the Explorer window to move to the folder where the vendor's parts data .CSV file has been copied or saved.
9. Click on the filename, and then click **Select File**. The program transfers the .CSV file into the Parts Vendor Upload application database, where it can then be used to update your PART-NO file.
10. At the Add New field, enter **Y** if you want this field map setup to add any *new* part numbers that may be found in the .CSV file into the PART-NO file in your ADP Parts application.
Enter **N** if you want the Update process for this field map to *only* make modifications to parts whose part numbers are already in your PART-NO file. This option allows you to continue to control which part numbers have records in your ADP Parts database. If, for example, you stock only a subset of a vendor's range of part numbers, the CPVU application will not add unstocked parts numbers to your database even if they appear in the .CSV vendor file(s).
11. After choosing a parts vendor file, press **F6=Assign** to open the mapping window.

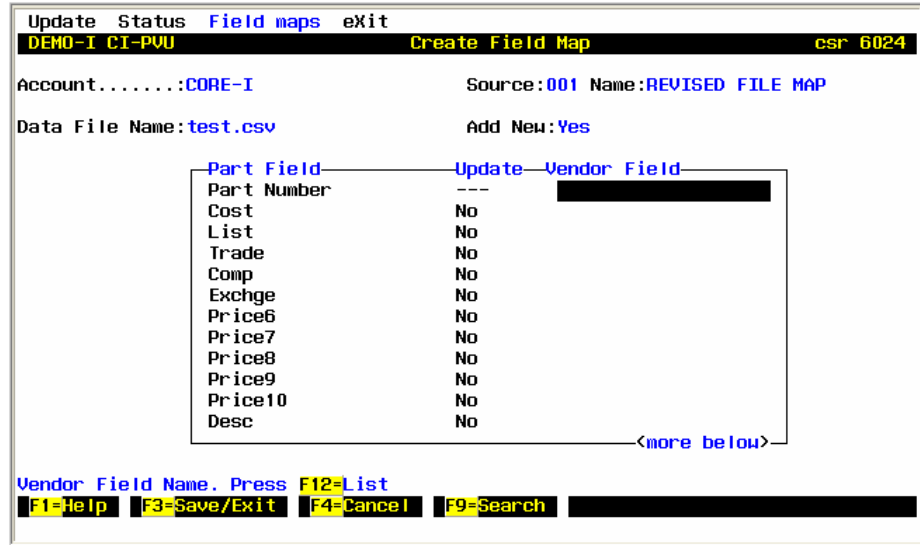


Figure 7. Field Mapping Window

Use the features in this window to define the map between .CSV column headings and the field names in your PART-NO file. The Part Number field is the only non-optional field in this window. (You cannot save the new field map setup without assigning the Part Number field to its corresponding column heading.)

The *Part Field* column lists the fields in your ADP Parts database file (PART-NO). The *Vendor Field* column lists the column heading names you select from the .CSV data file in the step that follows below.

- At the Vendor Field column, press **F12** to open a selection list.

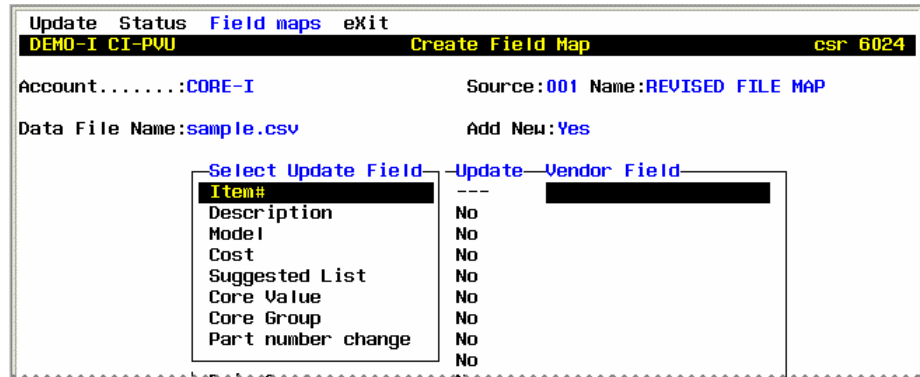


Figure 8. Assigning Parts Vendor File Fields

- Use the Up and Down arrow keys to find the field in the uploaded vendor file that matches the ADP Parts database field, and then press **Enter** to select it.

Part Field	Update	Vendor Field
Part Number	---	Item#
Cost	Yes	Cost
List	Yes	Suggested List
Trade	No	
Comp	No	
Exchge	No	
Price6	No	
Price7	No	
Price8	No	
Price9	No	
Price10	No	
Desc	Yes	Description

<more below>

Figure 9. Mapped Parts Fields (example)

The Update column value changes to *Yes* to indicate that the contents of the Vendor Field will update the contents of the corresponding field in the PART-NO file, when this field map and data file are processed by CPVU.

Note. If you need to remove a mapped field from your setup, move up or down to the line for the vendor field, and then press the Left arrow key to move to the Update column. Enter N to remove the parts vendor column heading assignment from the current PART-NO field name. The Part Number field assignment can be changed to a different parts vendor column heading, but it cannot be removed in this way.

14. Repeat the step above to select the remaining ADP Parts database fields you want to update with the values in the parts vendor file.
15. Press **F3=Save/Exit** to return to the main PIFS screen.
16. Press **F3=Exit**, and then select the **Save and Exit Record** option.

Updating a Field Map

Use the Update command on the Field Map to change one of the settings for a defined field map setup, to **upload a new vendor data file**, or to change the field mapping assignments.

As each new parts vendor .CSV file arrives, use this feature to upload the contents to your CPVU application database, where the contents can then be used to update your Parts database.

To update a field map:

1. Using your Reflection PC, follow the steps in *Accessing CPVU* on page 4 to launch the Parts Vendor Upload application.
2. At the top menu, select **Field Maps**.
3. Select **Update Map**.

```

Update  Status  Field maps  exit
DEMO-I CI-PVU                Parts Vendor Upload                csr 6024

Account-----Src-Map Name-----Current Vendor File
CORE-I          001 GARRETT SMALL                garrett_small.csv
CORE-I          001 REVISED FILE MAP                sample.csv
DEMO-I          103 TESTDEMO                        sample.csv
TRAIN-I         111 COPYTEST                        garrett_5-08.csv

```

Figure 10. Field Map Selection List

4. Use the Up and Down arrow keys to find the map name you want, and then press **Enter** to select it.

```

Update  Status  Field maps  exit
DEMO-I CI-PVU                Update Field Map                csr 6032

Account.....:CORE-I                Source:001 Name:REVISED FILE MAP
Data File Name:holset_2008_price_11  Add New:Yes

```

Figure 11. Update Field Map Screen

The program displays the current settings for the selected field map, including the Parts account name, the source code number, and the field map name. These settings, in combination, identify each unique field map and cannot be modified.

Perform any of the following operations to update your existing field map:

- To upload a new data file, move to the Data File Name field and then press **F5=Upload**. Use Windows Explorer to browse to your new parts vendor .CSV data file, and then click **Select File**. Click **Yes** to confirm the filename change, if applicable.

The program transfers the file from your Windows PC into the Parts Vendor Upload application database.

Important! *If you select a data file with different column headings than had previously been defined for this field map, the program will automatically clear the field map assignments in order to prevent errors.*

- To change the rules on whether new parts in the vendor file should be added to your Parts database, move to the Add New field and enter either **Y** for Yes or **N** for No. For details on this setting, see step 10 in *Creating a New Field Map* on page 5.
- To change or add field mapping assignments for this setup, press **F6=Assign**.

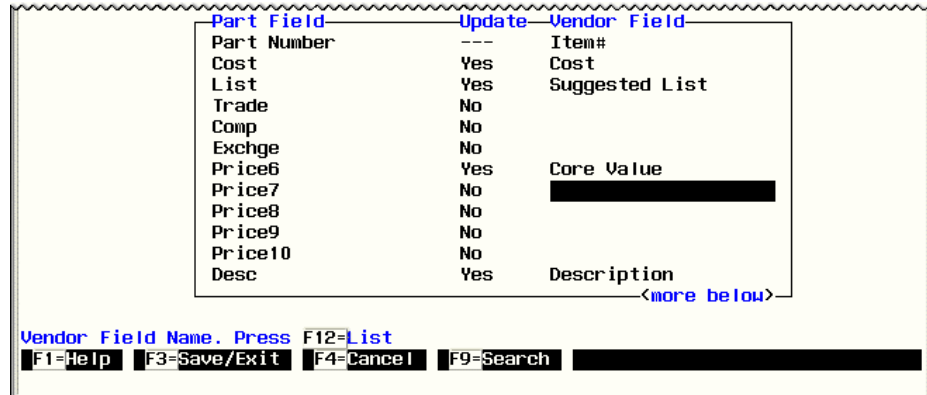


Figure 12. Field Mapping (example)

Use the arrow keys to move to the row for each Part Field you want to change. Press **F12** to open the selection list showing the column headings from the parts vendor data file, and use the **Enter** key to select each corresponding field name.

As with creating a new field map, you must make a selection for the Part Number field before you can save an updated field map.

After assigning the field maps, press **F3=Save/Exit**.

- At the Field Map Setup screen, press **F3**, and then select the **Save Record and Exit** option.

Copying a Field Map

If you have more than one Parts (*name-I*) application account, you may wish to create identical field map setups (for the same parts vendor) on your accounts. Use the procedure in this section to copy an existing setup to a different Parts logon.

You can also use this procedure to copy a field map under a different name on the same logon. This can be useful if, for example, you want to have two setups for the same parts vendor in which one setup adds new part numbers when you use it to update your Parts database, and one setup does not add new part numbers.

To copy a field map setup:

- Using your Reflection PC, follow the steps in *Accessing CPVU* on page 4 to launch the Parts Vendor Upload application.
- At the top menu, select **Field Maps**.
- Select **Copy Map to Map**.
- At the Field Map selection list, use the Up and Down arrow keys to find the name of the map you want to copy, and then press **Enter**.

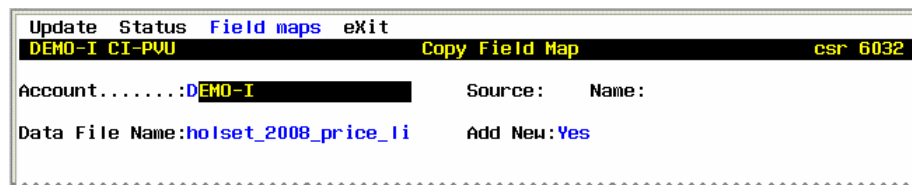


Figure 13. Copying a Field Map

5. At the Account field, press **Enter** to choose the displayed application account name.
- OR-**
- Press **F12** to choose a Parts account from the selection list.
6. Enter or select a source code number.
7. Enter a name for the new field map.
8. To upload a different data file to be used by this field map, use the **F5=Upload** command key, as described in steps 7-9 in *Creating a New Field Map* on page 5. If you change the data file name or upload a file with different column headings than in the original field map, you will also have to update the mapping assignments.
9. At the Add New field, enter **Y** if you want this field map setup to add any new part numbers that may be found in the .CSV file into the PART-NO file in your ADP Parts application. Enter **N** if you want the Update process to only modify records for part numbers that are already in your PART-NO file.
10. To set up your field mapping assignments, press **F6=Assign**, and refer to steps 11-14 in *Creating a New Field Map* on page 5.
11. To save your newly-copied field map, press **F3**, and then select the **Save Record and Exit** option.

Deleting a Field Map

To remove a field map setup you no longer need:

1. Follow the steps in *Accessing CPVU* on page 4 to launch the Parts Vendor Upload application.
2. At the top menu, select **Field Maps**.
3. Select **Delete Map**.
4. At the Field Map selection list, use the Up and Down arrow keys to find the name of the map you want to delete, and then press **Enter**.
5. At the confirmation prompt, enter **Y**.
6. A message is displayed to indicate that the selected field map was removed. Press **F3** to continue.

Updating the Parts File

Once you have created or updated a field map with a new parts vendor .CSV data file, you can update your Parts database with the vendor data at any time.

To update your Parts file:

1. Follow the steps in *Accessing CPVU* on page 4 to launch the Parts Vendor Upload application.
2. At the top menu, select **Update**.

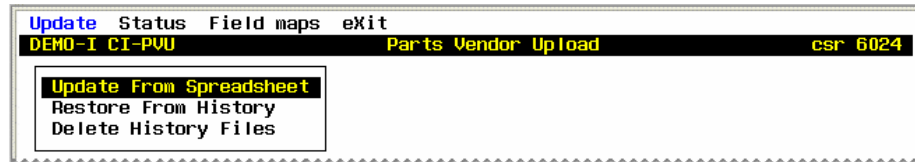


Figure 14. Update Command Menu

3. Select **Update from Spreadsheet**.

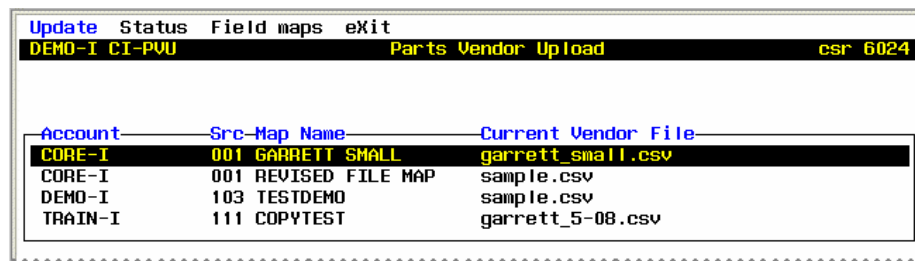


Figure 15. Field Map Selection List

4. Use the Up and Down arrow keys or the F9=Search command key to find the field maps you want to use. Press **Enter** to flag each field map that you want to update your Parts database at this time. You can select more than one, or simply press the asterisk key (*) to select all the entries in the list.
5. Press **F3=Continue**.
The application cross-checks the column headings in the selected .CSV files with the field mapping assignments. If they no longer match, the program cancels the Update command.
6. If all field maps are correctly set up, the program begins the update and displays a message indicating the account and port number where the update is in progress. Press **F3** to clear the message and return to the main CPVU screen.

Reviewing Update Status

Use the procedure in this section to check on the progress of an update under way, or to see the last time a field map and parts vendor data file were used to update your Parts database.

1. Follow the steps in *Accessing CPVU* on page 4 to launch the Parts Vendor Upload application.

2. At the top menu, select **Status**.
3. At the Field Map selection list, use the Up and Down arrow keys to find the name of the map you want to review, and then press **Enter**.

The Status column indicates whether the update is Processing or Completed

Date	Time	Vendor File	Status	Updated	Added	Appreciation
10/02/08	03:08	sample.csv	Completed	11	0	0.00

Figure 16. Status Table

The status table indicates the date(s) on which the update using the data file for the selected field map was run, along with the results (number of updated part numbers, number added, and total price appreciation).

Note. In some cases, a large field map update may still be in process when you review the status.

4. Press **F3** to return to the field map list.
5. Choose another field map, or press **F3** to exit to the main CPVU screen.

Restoring an Update

In some cases, you may wish to restore entries in your Parts database to their original values (prior to running an Update using the parts vendor's .CSV file).

Use this procedure to reverse an update, using the history maintained in the Parts Vendor Upload application.

To restore an update:

1. Follow the steps in *Accessing CPVU* on page 4 to launch the Parts Vendor Upload application.
2. At the top menu, select **Update**.
3. Select **Restore From History**.

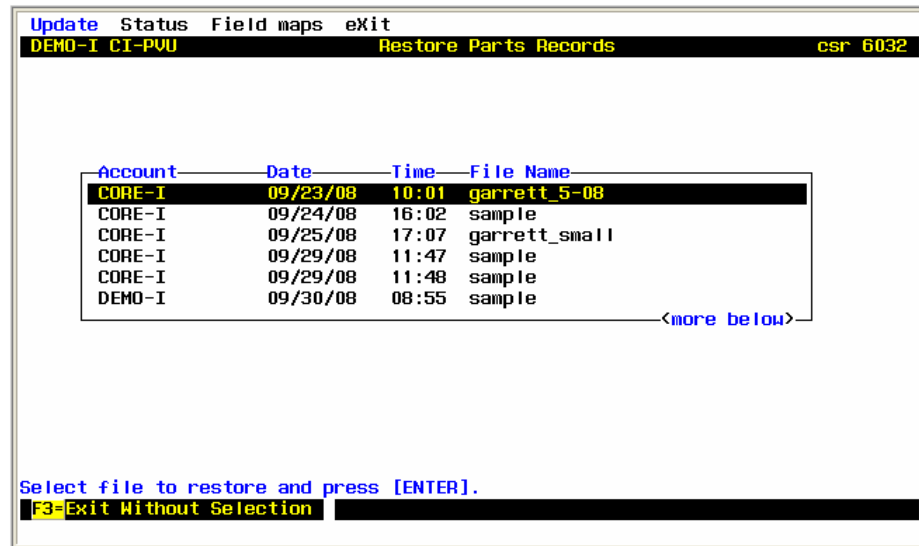


Figure 17. Update History Selection List

- Use the Up and Down arrow keys to find the application account, date/time, and vendor file name whose update you want to reverse. Press **Enter** to continue.
- At the confirmation prompt, enter **Y**. The program uses the update history maintained in CPVU to restore the prior Parts database values for the affected part numbers.

Deleting History Records

For your convenience, the Parts Vendor Upload application keeps an update history of each parts vendor data file and field map that has been used to update your Parts database. If you no longer need these files and wish to recover the disk space in which they are stored, you can use the procedure in this section to selective remove the update history records.

To delete obsolete vendor update history:

- Follow the steps in *Accessing CPVU* on page 4 to launch the Parts Vendor Upload application.
- At the top menu, select **Update**.
- Select **Delete History Files**. The program displays a list of application accounts, dates/times, and data file names for which the Update command has been run.
- Use the Up and Down arrow keys to find the records you want to purge, and press **Enter** to select each one.

Note. To select all entries in the list, press the asterisk key (*). Use caution with this option, as it may be advisable to keep the most recent update in CPVU until the next .CSV file arrives.

- Press **F3** to continue.



Figure 18. Delete History - Confirmation Prompt

6. The program displays details on the update record that will be deleted, including the account name, the date and time of the update, and the name of the .CSV file. Once an update record has been deleted from CPVU, it cannot be used to restore any changes made to your Parts database. To confirm, enter **Y**, or enter **N** to leave the update record intact.
7. Press **F3** to clear the confirmation message, and then press **F3** again to return to the main CPVU screen.

Deleting Old Vendor Files

Use this procedure to remove parts vendor files that are no longer attached to any of your field map setups. This can be useful to recover disk space from being occupied by large vendor data files whose file names have changed, or for parts vendors you no longer use.

To delete old .CSV data files:

1. Follow the steps in *Accessing CPVU* on page 4 to launch the Parts Vendor Upload application.
2. At the top menu, select **Field Maps**.
3. Select **Delete Unused Vendor Files**.
4. The program automatically searches the upload directory for filenames that are not associated with any field map, and purges them. The application then displays a message indicating the number of files that were removed. Press **F3** to return to the main CPVU screen.