Chapter

20

Interface Module

The Interface module allows the user to import information from many different systems into the Web Work system or to export data from the Web Work system. The interface module has the generic import and export function. For the import part, the Interface module is designed to accept ASCI text fields which are fixed and allows the user to map files from external programs to the appropriate Web Work fields. Once Interfaces are setup, they can be updated by the user to incorporate changes to the third party software. For the export part, the interface module is designed to create ASCI text fields and allows the user to map the fields and information that is exported. Once an interface is setup, it can be updated by the user to incorporate changes to third party software. This chapter describes how to setup and use the Interfaces Module.
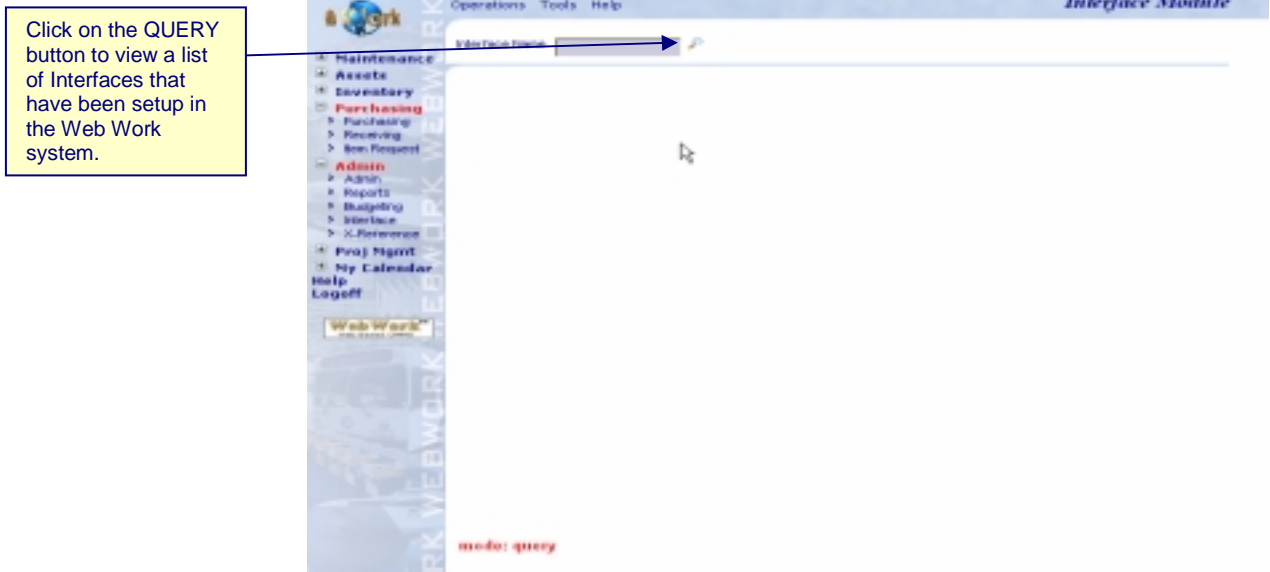
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20.1   Overview of the Interface Module

Overview of the Interface Module

To access the Interface module, click on the INTERFACE module button 〉 Interface on the left hand side of the screen. The Interface module will open in query mode as pictured below:

Click on the QUERY button to view a list of Interfaces that have been setup in the Web Work system.

The Operations Tools Help drop down menus contain the various features available in the Interface module.

Web Work includes "help files" for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.
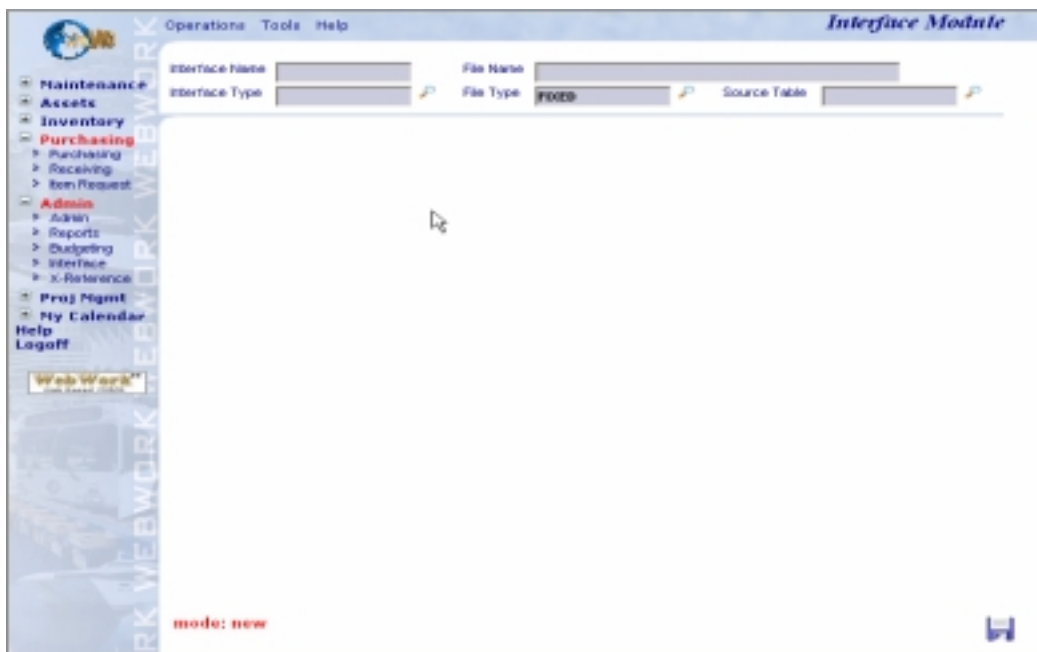
20.2   Creating New Interface for Import

To create an interface for import:

- To access the Interface module, click on the INTERFACE module button ⟩ Interface on the left hand side of the screen.

- Move the mouse over the Operations menu at the top of the screen to view the drop down menu.

- Select "New Interface" from the drop down menu. The mode you are in is displayed at the bottom left hand side of the screen. (ie: query mode, new mode)
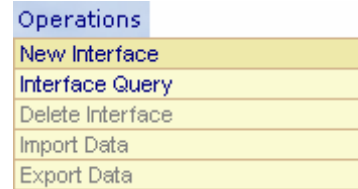
The Interface module will open in New mode as pictured below:

- Enter a name for the Interface into the Interface name field.

- Enter a name for the File into the File Name field.

- Enter the Interface Type or click on the QUERY button 🔎 to view the list of interface types available. Select one import type from the list. There are four import types, Employee import, Generic import, Vehicle import, Work Order import.

- Enter a File Type or click on the QUERY button 🔎 to select a type from those listed in the Web Work database.

- Enter the Source Table or click on the QUERY button 🔎 to select a table from those listed in the Web Work database.

- Click on the SAVE button ▣ which will save the information and open a table similar to the one pictured below:

Enter information into this table as applicable.

WW Field	Input Field (optional)	Start	Length	Format	Multiplier	Constant Value	Cross Reference
Transaction Date							
Vehicle							
Meter Reading					1		
Item Number							
Unit							
Rate					1		
Quantity					1		
Storeroom							
Account							
Total					1		
Item Description							
Vendor							

- Click on the SAVE button ▣ to save the information.

- Enter cross references (see Cross References Module for more information)

20.2.1   Row Headings

WW Field: This is the Web Work field name that is to be updated by the interface file.

Input Field: This is the name of the field used by the other system. This field is optional.

Start: This is the starting position of the field in the input file.

Length: This is the length of the field in the input file.

Format::   This is the date format. For example date format: YYYYMMDD

Multiplier: This is the multiplier that will be used if the field has assumed decimal points.

Constant Value: This is the value to be updated in a Web Work field, for each record imported. This is generally used when the input file is lacking information, required in Web Work.

Cross Reference: This is the cross reference of the codes used in other systems with codes used in web work.

20.3   Creating New Interface for Export

To create an interface for export:

- To access the Interface module, click on the INTERFACE module button ⁑ Interface on the left hand side of the screen.

- Move the mouse over the Operations menu at the top of the screen to view the drop down menu.

- Select "New Interface" from the drop down menu. The mode you are in is displayed at the bottom left hand side of the screen. (ie: query mode, new mode)
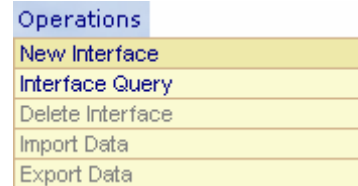
Operations
New Interface
Interface Query
Delete Interface
Import Data
Export Data

The Interface module will open in New mode as pictured below:

- Enter a name for the Interface into the Interface name field.

- Enter a name for the File into the File Name field.

- Select "Export" from the Interface Type list.

- Enter a File Type or click on the QUERY button 🔲 to select a type from those listed in the Web Work database.

- Enter the Source Table or click on the QUERY button 🖱? to select a table from those listed in the Web Work database.

> 👉 NOTE: Additional Queries can be added to the source table list. Please contact your Software Vendor for more information.

- Click on the SAVE button 💾 , which will save the information and open a table similar to the one pictured below. This table was created based on selecting the Accounts table.

WW Field	Save	Aggregate	Ext Field (optional)	Start	Len	Criteria	Set	Extract	Set	Format	Dec Place	Dec Point (Y/N)	Constant	Cross Ref	Del	Sa
Not Used																
	▾💾	▾					...		...						▸	▸
WW Field	**Save**	**Aggregate**	**Ext Field (optional)**	**Start**	**Len**	**Criteria**	**Set**	**Extract**	**Set**	**Format**	**Dec Place**	**Dec Point (Y/N)**	**Constant**	**Cross Ref**	**Del**	**Sa**

- Click on the down arrow in the WW field column to select the field(s) you wish to include. One row is created for each field selected. In each of the rows, pertinent data can be entered.

- Click on the down arrow ▾ to select an Aggregate if applicable. ie: Sum, Average, Group By or Where.

- Enter the name of the field into the external program. For instance in the Web Work Employee field may be called Empid in another program. This is an optional field.

- In the Start column enter the starting position of the field in the output file.

- In the Len column, enter the length you wish the output field to be.

- The Criteria column is a read only field. To set the criteria, click on the "…" in the Set field to the right hand side of the Criteria column. The set criteria window will open as shown below:
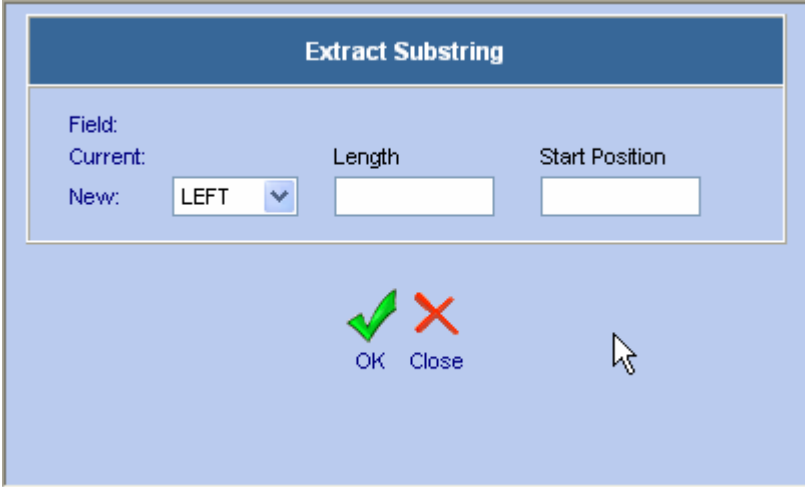
Change Criteria

Field:
Current:
New: < ▾ |_____| |_____|

✔ ✗
OK Close

- Enter selection criteria as applicable and click on the OK button ✔ to save the criteria and close the Field Criteria screen.

- The Extract column is used to specify the parts of a string you wish to extract. The extract column is read-only. To setup the Extract details click on the "…" in the Set field at the right of the Extract field.

For instance if a General Ledger code is ELEC00421, you may wish to only extract the numerical

portion of the code. Click on the three dots [...] in the Set column to the right of the Extract field to open the Extract Substring window as shown below.

- Click on the down arrow ⌄ and select Left, Right or Middle from the drop down list.

- Enter the length of the field. If you are uncertain of the length you can use a number, which you know is larger than the largest code. This can also be used when items will be of varying lengths.

- Enter the Start position. For example: If you entered a 5 into this field, the first four digits of the code will be ignored and the export will begin with digit five.

- Click on the OK button ✔ to save the Extract Substring information.

- Enter the format you wish to use into the format column. For example the date format in Web Work is d/m/yyyy, but you may wish the date to be formatted in the export file as yyyy/mm/dd.'

- Enter the number of decimal place if applicable into the Dec Place column.

- Enter Y or N into the Dec Point (Y/N) column.

☞ If the Dec Point Y/N is left blank it is assumed no decimal point is required.

- Enter a Constant Value. You may wish to include a value for each record that is exported in the export file, which contains a constant value. An example of when this would be used is if the other software has a field that Web Work does not have. This can only be used if the field is left empty.

- Enter the cross reference or click on the query button to select a cross reference that has already been setup. See Cross References for more information on setting up cross-references.

- Click on the SAVE button to update this row of the Export Interface you are working in.

You can now continue adding fields to this Export Interface, and then Export the file (see instructions further on in this section of the Web Work manual).

20.3.1 System Parameters

When setting up the export information, Web Work has some built in system parameter.

The system parameters are:

1. System Date – If you would like all dates to be the date of the export, enter system date in the constant field of a row that does not contain a WW field. When using system date you can also choose the format (in the format column ie: mm/yy. When the file is exported each record will contain the date of the export in the format specified.

2. Sign – If you would like all numbers to include a + or – sign as applicable, you can set this up so that an additional column beside numbers exported will indicate + or -. For example if the Web Work field is called Totalcost. Enter Totalcost in the WW field column and sign in the format column. Then enter Totalcost in another WW field as well. The first Totalcost field will indicate + or -. The second Totalcost field will indicate the numerical value for this field.

3. Counter – If you would like the exported records to be numbered 1,2,3, 4 etc, you can set this up in your export interface table. To set up the counter, simply enter counter in the constant field, in a row that does not contain a WW field.

NOTE: Total cost must be setup in 2 rows if you wish to have a numerical value and a + or – value indicated.

Enter sign in the format column if you wish to have a + or – sign for the numerical field you have setup.

WW Field	Save	Aggregate	Ext Field (optional)	Start	Len	Criteria	Set	Extract	Set	Format	Dec Place	Dec Point (Y/N)	Constant	Cross Ref	D
Not Used															
Estimate	💾			0	0	<> 0	--								
Employee	💾			1	20		--								
TransDate	💾			21	10	BETWEEN 1/1	--		--	yyyymmdd					
	💾			31	6		--		--	yy/mm			system date		
TotalCost	💾			37	1		--		--	sign					
TotalCost	💾			38	8		--		--		2	N			
	💾			46	2		--		--						
	💾			48	4		--		--		0	N	counter		
	💾						--		--						
WW Field	Save	Aggregate	Ext Field (optional)	Start	Len	Criteria	Set	Extract	Set	Format	Dec Place	Dec Point (Y/N)	Constant	Cross Ref	D

Enter counter in the constant column to include record numbering for the export file.
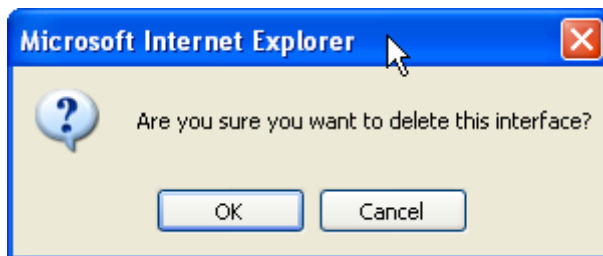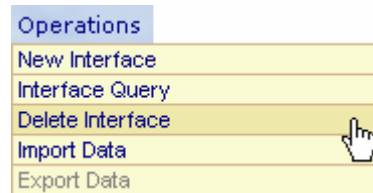
20.4   Editing Interface Information

To edit interface information:

- To access the Interface module, click on the INTERFACE module button ⟩ Interface on the left hand side of the screen.

- Perform an interface query to locate and retrieve the applicable query. See Interface Queries for more information on performing interface queries.

- Edit information as required.

- Click on the SAVE button 💾 to save the updated information.

20.5   Deleting Interfaces

To delete an interface:

- To access the Interface module, click on the INTERFACE module button ⟩ Interface on the left hand side of the screen.

- Perform an interface query to locate and retrieve the applicable query. See Interface Queries for more information on performing interface queries.

- When the applicable query is open, move the mouse over the Operations menu at the top of the screen and select Delete Interface from the drop down menu.

Operations
New Interface
Interface Query
Delete Interface
Import Data
Export Data

- The message window will open as shown below:

Microsoft Internet Explorer

Are you sure you want to delete this interface?

OK   Cancel

- Click on the OK button to delete this interface.

20.6   Performing Interface Queries

Perform a query, to access interfaces that have already been setup in the Web Work system.

To perform an Interface Query:

- To access the Interface module, click on the INTERFACE module button ![Interface] on the left hand side of the screen.

- By default when you enter the Interface module you will be in Query mode. If you have been working elsewhere in the Interface module, move the mouse over the Operations menu at the top of the screen to view the drop down menu.

- Select "Interface Query" from the menu.   The mode you are in is displayed at the bottom left hand side of the screen. (ie: query mode, new mode)

- The Interface module will open in query mode as shown below:
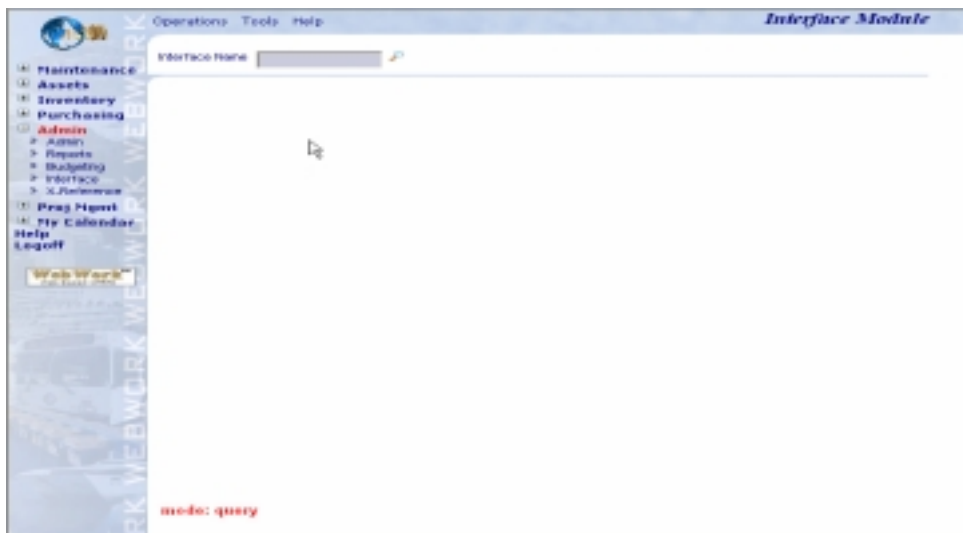
- Click on the QUERY button ![query icon] to open the Interface Selection screen as shown below:
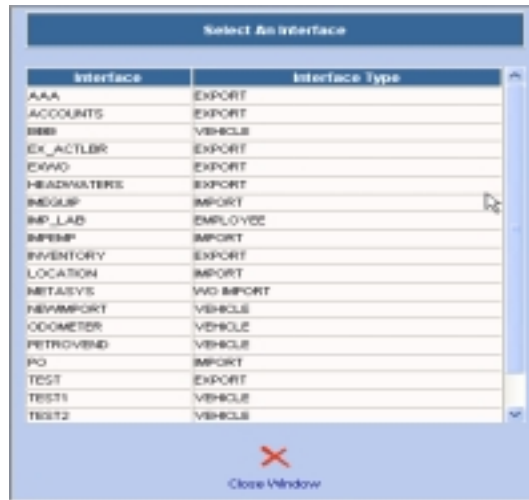
- Click on any of the records to view the applicable interface.

20.7   Importing Files

To import a file from another program into Web Work:

- Set up the interface as explained at the beginning of this chapter.

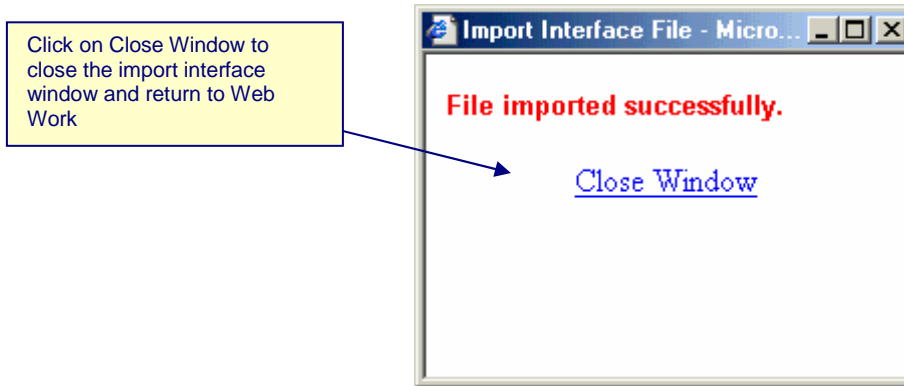- Move the mouse over the Operations menu at the top of the screen and select Import Data from the drop down menu.
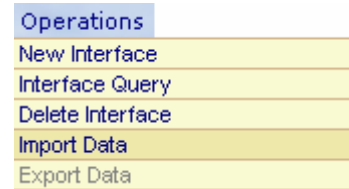
The Import Data File screen will open as pictured below:
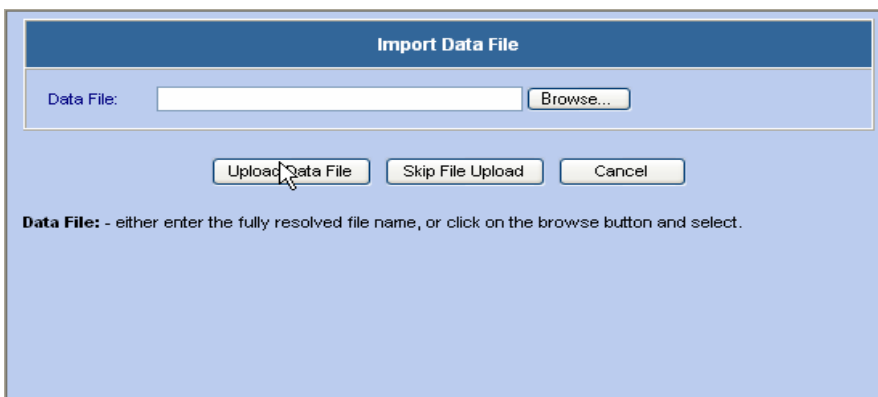
- Enter the name of the Data File or click on the BROWSE button to locate and select a file.

- Click on the UPLOAD DATA FILE button to begin the upload.

- <u>DO NOT</u> close the window while the file is being imported. When the file is finished being imported, the following screen will appear.

Click on Close Window to close the import interface window and return to Web Work

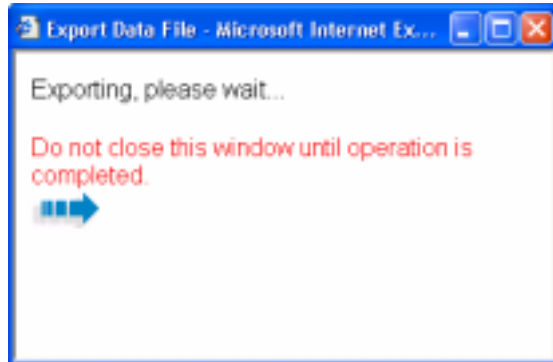- Click on <u>Close Window</u> to close the import interface file window and return to Web Work.

20.8   Exporting Files

To export a file from Web Work:

- Set up the interface for export as explained at the beginning of this chapter.

- Move the mouse over the Operations menu and select Export Data from the drop down menu. The Export Data File screen will open as pictured below.
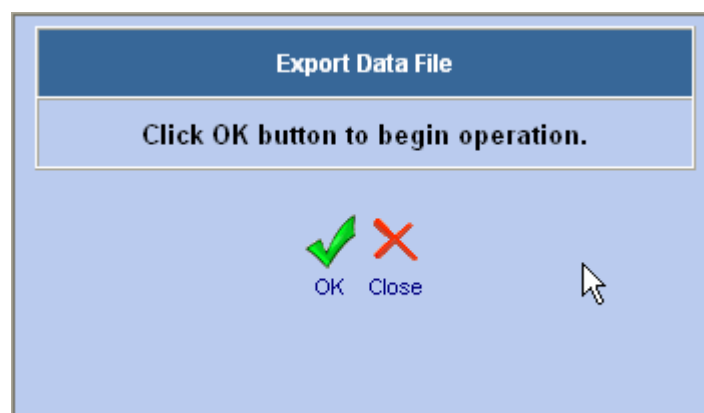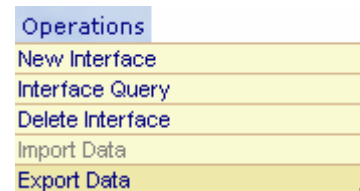
- Click on the OK button to begin the Export or on the CANCEL button to cancel the operation.
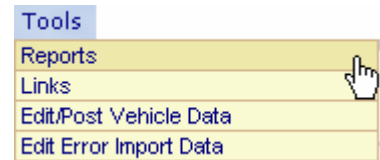
DO NOT close the Export Data File window while the file is being exported.

- When the file is finished being exported a screen confirming the file has been successfully exported will be displayed. Click on Close Window to close the export interface file window and return to Web Work.
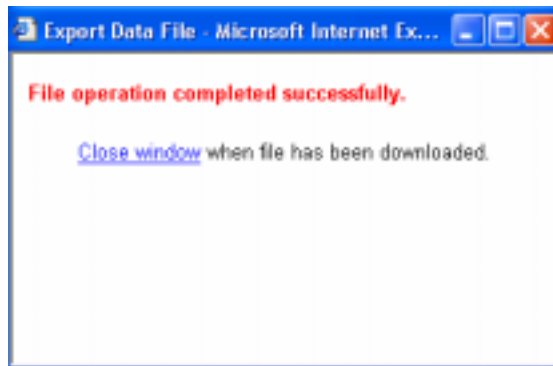
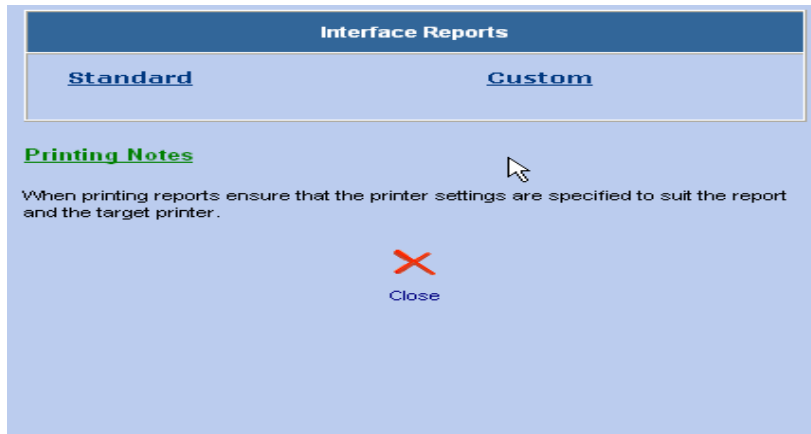## 20.9   Interface – Reports

- To access Interface reports move the mouse over the `Tools` menu and select Reports from the drop down menu.

- A screen similar to the one shown below will open:

Interface Reports

Standard   **Custom**

Printing Notes

When printing reports ensure that the printer settings are specified to suit the report and the target printer.

✕
Close

- Click on any of the Reports listed under Standard or Custom, to open them.

☞ Only reports applicable to the Interface module will be displayed. To view all reports, click on the REPORTS module button `> Reports` on the left hand side of the Web Work screen. For more information about reports, see the Reports section of this manual.

20.9.1   Creating Interface Reports

Reports cannot be created in the Interface module. To create an interface report click on the REPORTS module button `> Reports` to access the report writer and create the report.

20.9.2   Printing Interface Reports

Interface reports can be printed from the Interface module or from the Reports module.

To print a report in the Interface module:

- Open the Interface module.

- Move the mouse over the `Tools` menu and select Reports from the drop down menu.

- Select the report you wish to print by clicking on its title.

The report will open in Preview mode.

- Click on File and select Print from the drop down menu to print the report.

20.10 Links

When you are in the Interface module and you select Links from the `Tools` menu, the Web
Work Create/Edit Links window will open as shown below. You can view existing links or create new
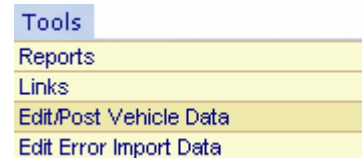Links using this feature.

> ☞ You can only view links, which have been setup to be accessible from this module or from all
> modules. Links set up in other modules with the accessibility set as only within that module will not
> be shown.

20.11 Edit/Post Vehicle Data

This function will be used to correct the error import vehicle records and then put them into the related table.

To modify the vehicle data in the Interface module:

- Open the Interface module.

- Move the mouse over the `Tools` menu and select Edit/Post Vehicle Data
  from the drop down menu.

- The error data will be listed on the screen.

- Highlight and Click any error record to open the "Edit Imported Data" screen. Please first read the error message in the "error" field, and then correct them. If you finish it, click the SAVE button 🖫 to save the changes.
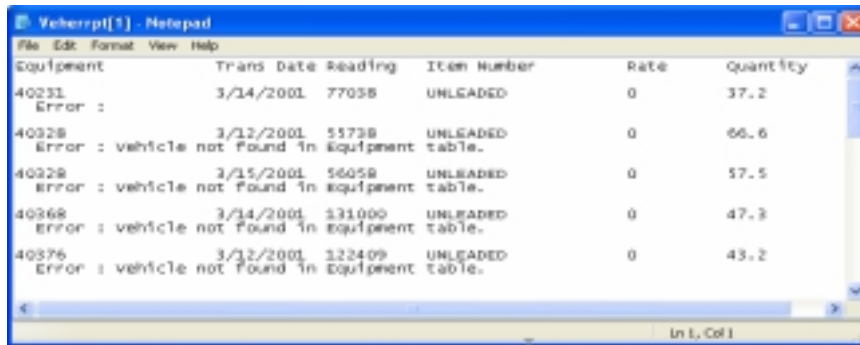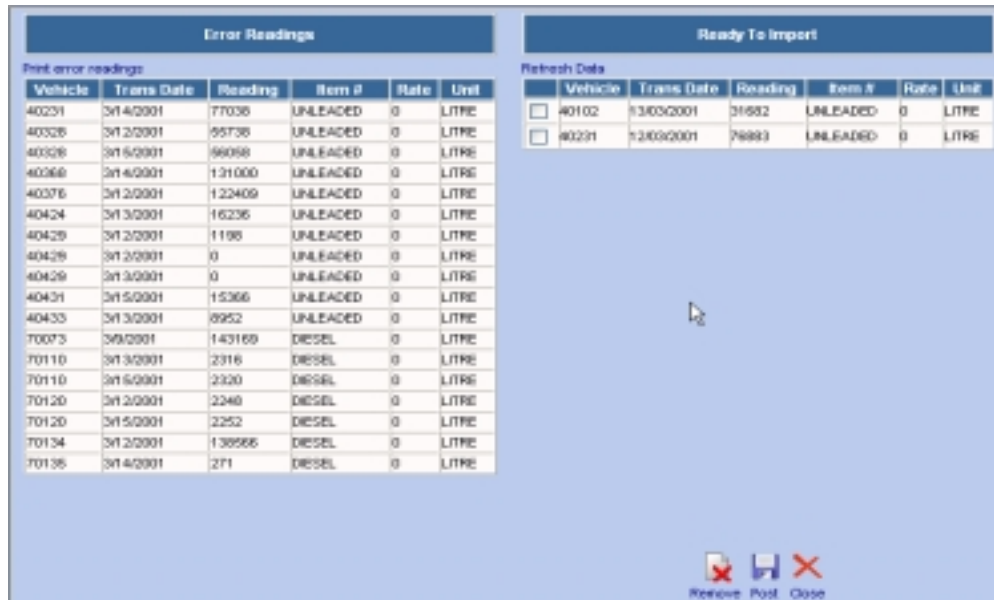

- Click Print error readings to list the detail error message for all records.
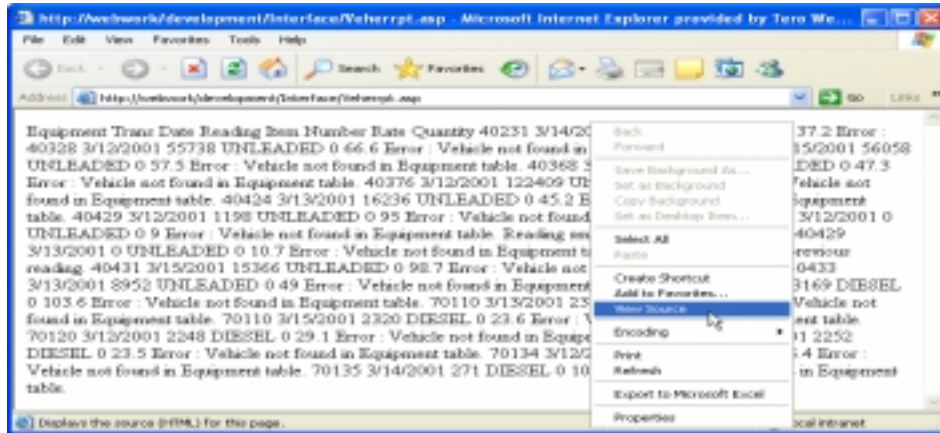
- If select "View Source" from the pop-up menu, you will get the text version of the error readings just like this:

- When you click Refresh Data , the interface program will validate all records again and put the correct records in the "Ready To Import" section.
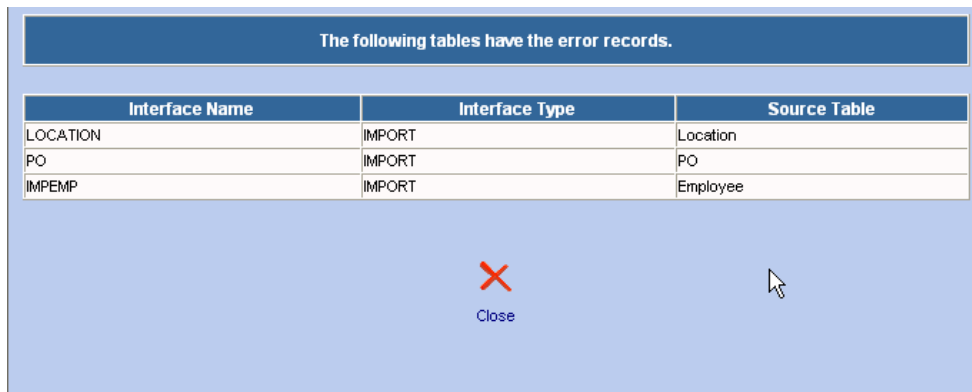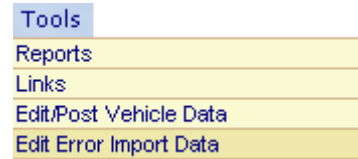
- Check off the ☑ checkbox beside certain record and click the REMOVE button ✖ to remove this record from "Ready To Import" to "Error Readings" in order to make further changes.

- Click the POST button 💾 to import correct data to the related table.
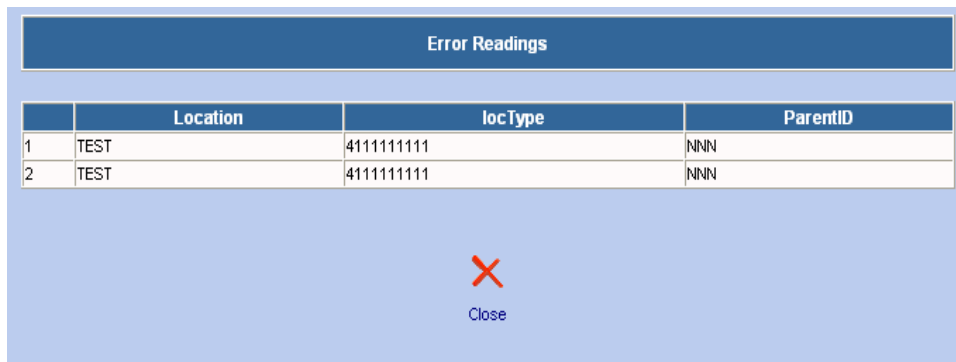
20.12 Edit Error Import Data

This function will be used to correct or delete the error import records.

To modify the data in the Interface module:

- Open the Interface module.

- Move the mouse over the Tools menu and select Edit Error Import Data from the drop down menu.

| Tools |
| Reports |
| Links |
| Edit/Post Vehicle Data |
| Edit Error Import Data |

- The interface that has the error data will be listed on the screen.

The following tables have the error records.		
Interface Name	**Interface Type**	**Source Table**
LOCATION	IMPORT	Location
PO	IMPORT	PO
IMPEMP	IMPORT	Employee

✖
Close

- Highlight and click on the interface that you wish to view the data.

- The following screen will open.

Error Readings			
	Location	**locType**	**ParentID**
1	TEST	4111111111	NNN
2	TEST	4111111111	NNN

✖
Close

- Highlight and click one error record and the detail information will be displayed on the "Edit Imported Data" screen. Please first read the text in the "Error For this record", and then correct them. After edit, click the SAVE button ![save icon] to save the changes. The interface program will automatically check the record again. If this record is correct, it will be put into the related table and will disappear from the "Error Readings" screen. It will remain in the "Error Readings" screen if it also has some kind of errors. You also can delete this record by clicking the DELETE button ![delete icon] .

Edit Imported Data	
Error For This record	ParentID 'NNN' is not in the 'Location' table. Location 'TEST' exists. 'TEST' is duplicate Location.
ImportID	1
Location	TEST
locType	4111111111
ParentID	NNN