

Understanding the ViewPoint WFM Flat File

Introduction

The purpose of this document is to provide a detailed description of what the WFM flat file is and how to configure ViewPoint to import it.

Overview

In order to provide complete technician compliance reports, ViewPoint needs information to compare what the technician uploaded to what he was supposed to complete. In other words, if the technician is required to run a specific autotest at specific locations for a specific job type, the server needs to know these requirements so they can be compared with the completed test results the technician uploads. This information usually comes from the billing system, is in the form of a flat file, and is placed directly onto the server daily. There are four pieces of information needed in the flat file:

Tech ID – The technician that was assigned the job. This value must match the tech ID in the meter.

Job Number – A six to sixteen character alpha-numeric number. This must match the job number the tech enters in the meter. Most MSOs use a 6-9 digit numeric number. This number must be unique to the specific visit by that tech for the specified date.

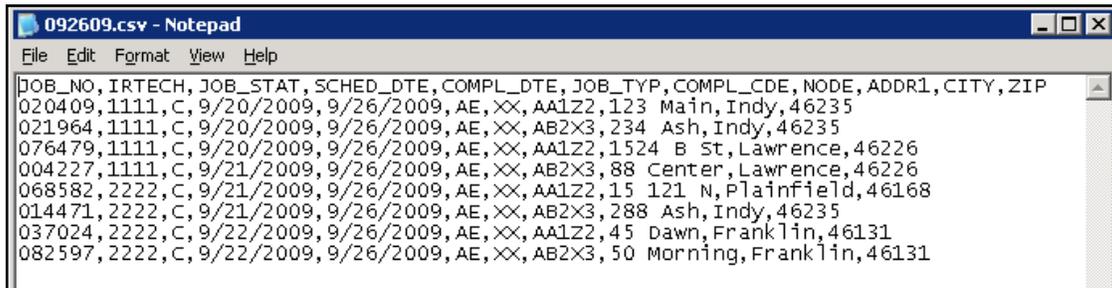
Date – The date the job is to be completed.

Job Type – Usually a two-digit alpha-numeric field that describes the job type, e.g. install, upgrade, trouble call, etc. This field determines what autotest is to be performed.

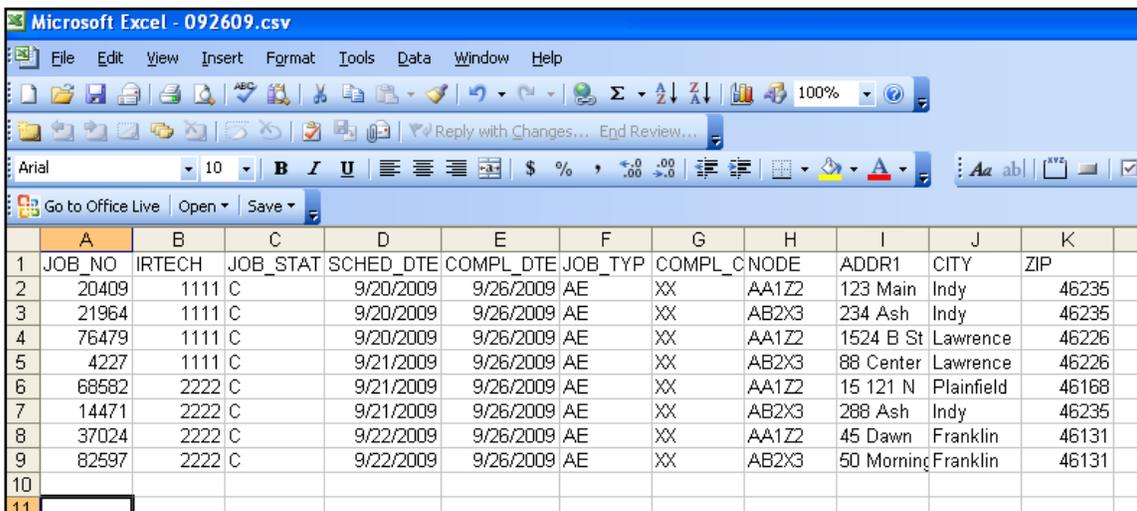
Additional information can be included in the flat file and imported into ViewPoint, if desired. Most MSOs will include Node, Street Address, City, State, and Zip. If these fields are included, additional reports can be run. For example, if the Node information is included, the user can run a report showing all failed tests within a specified date range and organize the information by Node name. Another example would be to see how many times technicians have visited a specific street address in a one year period.

Sample Flat File

The following image shows a sample flat file. In this example, we are using a .csv file, or a comma separated file. ViewPoint can import files of different types and delineation. This will be described later. Note that the column headers are present, and must be included for each flat file placed on the server.



The above image shows the file being viewed with Notepad, but it is sometimes easier to view a .csv file with Excel, as shown below:

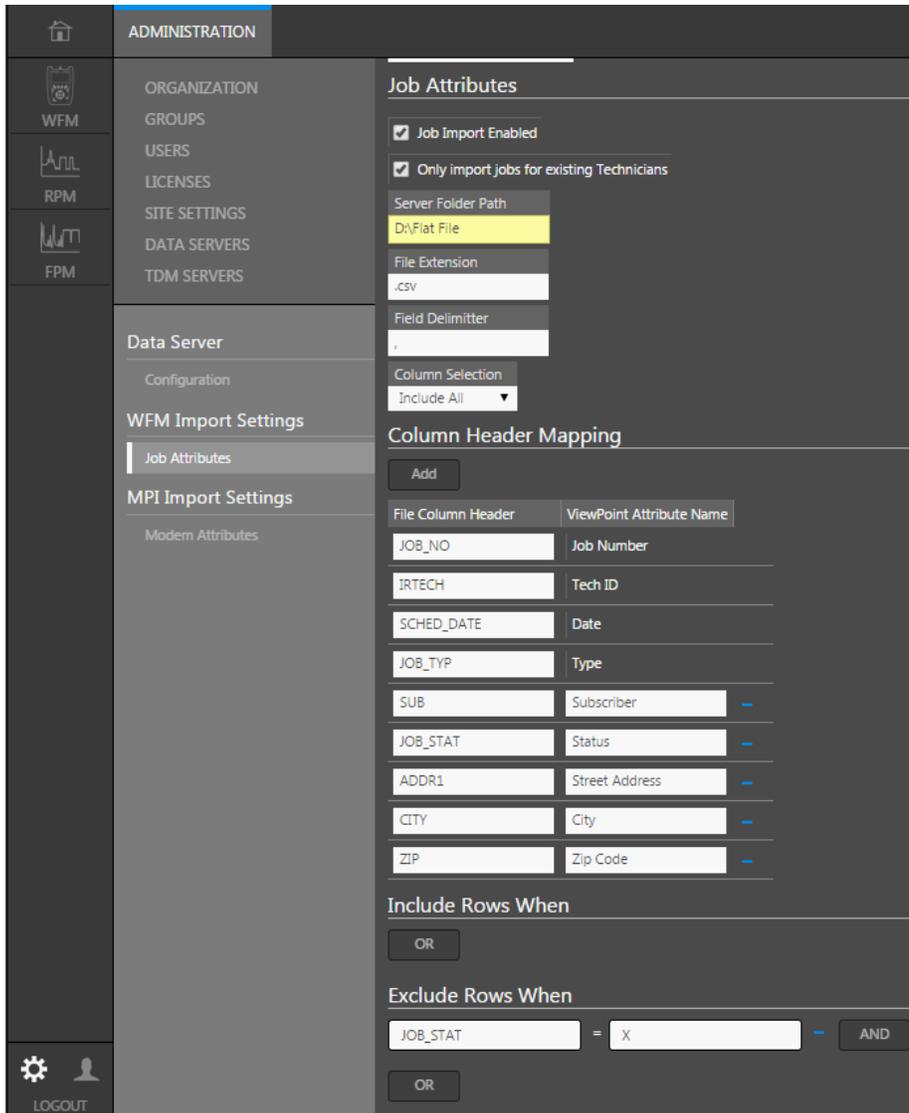


	A	B	C	D	E	F	G	H	I	J	K
1	JOB_NO	IRTECH	JOB_STAT	SCHED_DTE	COMPL_DTE	JOB_TYP	COMPL_CNODE	ADDR1	CITY	ZIP	
2	20409	1111	C	9/20/2009	9/26/2009	AE	XX	AA1Z2	123 Main	Indy	46235
3	21964	1111	C	9/20/2009	9/26/2009	AE	XX	AB2X3	234 Ash	Indy	46235
4	76479	1111	C	9/20/2009	9/26/2009	AE	XX	AA1Z2	1524 B St	Lawrence	46226
5	4227	1111	C	9/21/2009	9/26/2009	AE	XX	AB2X3	88 Center	Lawrence	46226
6	68582	2222	C	9/21/2009	9/26/2009	AE	XX	AA1Z2	15 121 N	Plainfield	46168
7	14471	2222	C	9/21/2009	9/26/2009	AE	XX	AB2X3	288 Ash	Indy	46235
8	37024	2222	C	9/22/2009	9/26/2009	AE	XX	AA1Z2	45 Dawn	Franklin	46131
9	82597	2222	C	9/22/2009	9/26/2009	AE	XX	AB2X3	50 Morning	Franklin	46131
10											
11											

ViewPoint Configuration

Once you have the flat file, the next step is to configure the Trilithic ViewPoint software to import it. You must have administrator rights in the software for these steps. First, select the **Administration** menu, select **Data Servers**, and select your data server (in most cases there is only one.) Then select the **Edit** button at the top of the page.

Select the **Job Attributes** link under WFM Import Settings and then check the **Job Import Enabled** box under the Job Attributes section. The display should look similar to the image below.



The screenshot shows the 'ADMINISTRATION' menu with 'DATA SERVERS' selected. Under 'WFM Import Settings', 'Job Attributes' is selected. The 'Job Attributes' section is expanded, showing the following configuration options:

- Job Import Enabled
- Only import jobs for existing Technicians
- Server Folder Path: D:\Flat File
- File Extension: .csv
- Field Delimiter: ,
- Column Selection: Include All

The 'Column Header Mapping' section contains the following table:

File Column Header	ViewPoint Attribute Name
JOB_NO	Job Number
IRTECH	Tech ID
SCHED_DATE	Date
JOB_TYP	Type
SUB	Subscriber
JOB_STAT	Status
ADDR1	Street Address
CITY	City
ZIP	Zip Code

The 'Include Rows When' section has an 'OR' button. The 'Exclude Rows When' section has a filter: JOB_STAT = X, with an 'AND' button and an 'OR' button below it.

The following is a description of the options under the Job Attributes section. This section tells ViewPoint where the file is, what type it is, and what columns to import.

Job Import Enabled – Enables the importing of the flat file. This should be checked.

Only Import Jobs for Existing Techs – This filters the import to only those jobs where the tech ID in the flat file matches an existing technician in ViewPoint. This is commonly used when one large flat file is placed on multiple ViewPoint servers. Each server will then only import the jobs that are assigned to its techs.

Server Folder Path – Where the flat file is stored on the server. Typically this is on the data drive and can be configured by the end user. An example is D:\ Flat File, which is a folder named Flat File on the D:\ drive of the server. How the flat file gets placed into this location is left up to the end user. Most MSOs use ftp, shared folder, etc.

File Extension – The file type, e.g. .csv or .txt. In this example, we are using a .csv file.

Field Delimiter – The delimiter separating the different fields in the flat file, e.g. comma, tab, or bar. In this example, we are using a comma.

Column Selection – Options are Include All, Include Only, and Exclude. Include All is the selection most commonly used and tells ViewPoint to import all columns. If Include Only or Exclude are selected you will be able to define which columns to import or exclude.

The next section describes the options under the Column Header Mapping section. This section tells ViewPoint how to read the flat file.

You will notice there are four columns required by ViewPoint: Job Number, Tech ID, Date, and Type. The File Column Header fields must exactly match the column headers in your flat file, as in this example. The ViewPoint Attribute Name is the common name for these fields. In this example, you will notice there are additional column headers named SUB, JOB_STAT, ADDR1, CITY, and ZIP. These are extra columns in the flat file user can import as well.

Select the **Add** button at the top of this section to add additional columns. Match the File Column Header value to the column header name in the flat file, and then define the common name. If a column is imported, these values will be associated with the corresponding job and can be searched in ViewPoint reports.

The remaining options are additional filtering options available when the flat file is imported. In this example, we are excluding any rows where the JOB_STAT column has a value of X.

When finished with the ViewPoint configuration, select **Save** at the top of the main window.

Additional Information

Once the flat file is placed into the correct folder on the server, it is imported almost immediately. Most MSOs will place the flat file onto the server at least daily, and the flat file will contain job information for the previous three days. If the job status, tech ID, or other info for a specific job has changed from an earlier file, ViewPoint will update the information based on the most current date.

After importing the flat file, it may take the server several minutes to process before the information is available in a report.



NOTE

For Additional Help, Contact Trilithic Applications Engineering

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