

PDM Data Adaptor for MAX from Exact Software

Features

1. Program will read ChangeCast, Mentor Graphics, Viewlogic, Orcad, and other output files and put data into a temporary holding file (PartImport.mdb, Access 2000). MAX data which can be imported : Part Master, BoM, Manufacturer Parts, Bom Notes into Windows Note file. Records will be tagged with a Site and Customer code, allowing for loading into multiple MAX data directories per site based on Customer Codes. Each site will only load detail records which apply to them, identified by Site Code in Export file Output files. (see attached doc : SetupRun for setup details)
2. Bom Notes will be loaded into a separate table for upload, not marked.
3. Holding database contains a set of default tables, which allows the user to assign default values to MAX fields not covered by Export file (e.g. Part Type, Costs, Acct Code, etc.)
4. MAX upload will read data from holding tables, adding values not assigned from default tables, and update MAX database.
5. Successful adds will be marked with an '!' in the UDFKey, allowing the user to find the newly added records in MAX and make further modifications. Successfully added records in the holding table are marked and an add date is added (no records are deleted)
6. A Crystal Report can be generated detailing those records which failed to add (user initiated).
7. A function is included which allows the user (through Access) to go into holding table and directly edit the failed records, and then re-upload them without re-reading in the output files.
8. Function which will clear holding database when records no longer required (user initiated). Keeps tables to manageable size.



PDM Data Adaptor for MAX from Exact Software

Requirements & Operation

1. User will set paths to MAX Database, location of Export files in Setup (Export, Working, Archive, and Problem directories).
2. User will run the 3rd party export program.
3. User will initiate export / import cycle.
4. Program will move export files to working directory, read export file, import data to holding table, insert records into MAX database tables
5. Part records will be added, if new, updated if changed. Obsoleting a part in Export file, change Max Part Master Engineering Status field to 5 – (Obsoleted).
6. Product structure records will use a Delta output from Export file, and load with the following logic :
 - Add new component : Add new record with effectivity from Export file.
 - Delete a component : Deleting a parent child relationship in Export file will delete the parent child relationship.
 - Change value for component (qnt, ECN # etc.) : Update values for specific parent/component/eff date.
 - Mfg Part records will be added, if new, changed if values change, or deleted. Deletion incurs deleting all Part Vendor records and MPN data in MAX related to MPN/Mfg record.
7. Last section of BoM line will be added to BoM Notes (Windows Note file), loaded into its own holding table.
8. Records will be tagged to indicate new addition in tables ('!' In UDF Key, remove when verified/modified in MAX).
9. When insert is confirmed as successful, file will be moved to archive directory. Problem files will be moved to Problem directory.
10. Program will loop through remaining files until all are read.
11. For Eng Status : Table included in PartImport.mdb which allows users to map Export file Engineering Status codes to MAX Eng Status codes, supports multiple Export file codes per MAX code.

Additional Features

1. Crystal Report detailing which records were added to MAX (new adds), allowing the user to easily go into MAX and select them in order to further modify them. '!' should be removed from MAX tables once part has been edited.
2. Ability to set defaults for multiple Part Commodity Codes (dependent upon Export file containing a link to the specific commodity code a particular part is being assigned. Requires a field in Export file which can be used to hold this value. Will match up to MAX Commodity Code)
3. Ability to run BoM Comparator function to compare loaded Bom to the one currently in MAX.
4. Auto run enabled included. (PartImport.exe /AUTO)