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| Process laid out with Tamara Hoff… along with trade off of being a manual process |  |
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| Receive file from Tammy |  |
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| Report-2 tab contains raw data |  |
| Only rows with values in columns I – M need be loaded.  Note the Closeout note… if had been previously loaded, would want to load with a closed date. |  |
| Alternatively could manually close it in the CR Admin UI (example allocation… not same as above) |  |
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| Data in columns A – M should be copied into template |  |
| As A – M on the report-2 tab.  Report-2 an artifact of first report received for loading… could just as easily be called data. |  |
|  |  |
| Columns O – AH should be copied to rows where data exists in columns I - M |  |
| Map tab is static. All of these UMCIP strings is expected to be of CF010 type as it represents all of the CF’s they have exposed in their report. If varies, will need to edit to accommodate the additional CF’s in columns O – Y. The concatenation in column AA already written for them. Additionally would need to change the map value in column Z |  |
| Map tab is static… is simply the mapping of our 24 distinct combination possibilities in by CFnnn values. CF010 appears to the only values we should expect. |  |
| MatterFilters tab is static |  |
| Work page used to create the ‘\_zZz\_’ delimited account values used by Matter Filter  D58 has the string currently used in PRD.  If expose additional account values in CR… would need to copy down row 58 for however many new accounts are exposed… add the accounts in column A… preferably keeping them in asc order… being sure to leave the last cell in the B column unpopulated. |  |
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| Project Name SQL tab holds SQL to pull project names for use in the next tab. Edit project ID’s listed for current population being loaded |  |
| Project Name Lookup housing Project and Descr. Column D an artifact from testing to note which was loaded when. |  |
|  |  |
| Matter-qa-A3F9-%.txt tab builds the value to be used in the Matter text file  Rows should be copied to align with rows from report-2 tab that possess CF’s to be loaded… remove any extraneous rows  Note column P is a static CPPMX in keeping with current understanding of the RRC submitting these values.  Also note that RouteIndependent column G may need to change to TRUE depending on outcome of case 965127… and/or 975188 that really should be addressing RouteIndependent |  |
|  |  |
| Column AA contains header and row concatenation that should be copied into the .txt file |  |
| Make sure there are no extraneous rows |  |
| Save .txt as Matter-prod-A3F9-2018-12-13-0001… using current date where 0001 is a simple file sequence number if there were to me more than 1 file for the date. |  |
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| MatterFilters-qa-A3F9-%.txt builds the value to be used in the Matter Filter file  No static values here… just formulas pulling the components of the row to load columns A and B… together in column G  Rows should be copied to align with rows from report-2 tab that possess CF’s to be loaded… remove any extraneous rows |  |
| If ever add additional accounts… B column will need formula changed to pull this expanded value found back on the MatterFilters tab | =+MatterFilters!$D$58 |
|  |  |
| Copy populate rows in column G to .txt |  |
| Make sure there are no extraneous rows |  |
| Save .txt as MatterFilters-prod-A3F9-2018-12-13-0001… using current date where 0001 is a simple file sequence number if there were to me more than 1 file for the date. |  |
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| Submit the  Matter-prod-A3F9-2018-12-13-0001  MatterFilters-prod-A3F9-2018-12-13-0001  Files to CR via a case. |  |
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| When successfully loaded… will receive an email confirmation from CR like this one sent to Beth |  |
| If one were to ever fail… will receive an email as well…  This one apparently as they did not place a .ack file when they loaded it. |  |
| …or if there were some data fault…  …which in the first run into PRD occurred. Though format was same at that tested in QA.  Issues with missing | addressed by them in the file and has also been addressed in the template that produces. |  |
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| Once loaded… can see here |  |
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| …and here |  |
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| …where matter filter is exposed as it is not in the Admin UI. |  |
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