

File Name Formats for Auto Document Linking Tool

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Description

In order for the Automated Document Linking Tool to attach each document to a key or transaction value in Global Shop, it needs the key or transaction to be in the file name. Each link type has a specific value that they use to specify its linked object. For example, Inventory Parts use their Part and Location as their identification when linking documents to a part. This needs to be specified in the file name when dropping a file in the “drop” folders.

When creating the file name of the file that will be placed in the “drop” folders, the format should be as follows.

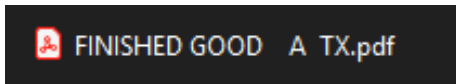


Figure 1 – Example of labeling a dropped file with a key that will assign the file to a part

By specifying the file name in *Figure 1*, this file is ready to be linked to Part “FINISHED GOOD”, Revision “A” and Location “TX”. The extension of the file does not have an effect on the linking system. Each link type requires a very specific structure to link the documents to their intended destination.

If the whole field isn’t used by the object that the document will be attached to, the file name will need whitespace after the field’s key values have been entered if there is a needed field following it. See in *Figure 1* that there is blank space between the Part number and Revision number. Since Global Shop allows for 17 characters for Part numbers, the document link key needs extra characters of whitespace to fill in the rest of the Part number. In *Figure 1*, “FINISHED GOOD” is 13 characters; this means that the file name needs 4 characters of whitespace to be able to add the Revision number to file along with the part.

If a field is not used by the object that will have documents attached to it, the file does not need to include them if they come at the end of the key. For example, in *Figure 1*, if the Part was not assigned to a location, we could shorten the file name.

By specifying the file name in *Figure 2*, we have removed the Location from *Figure 1*. Since Location comes at the end of the key and Revision is the last field on the key that we need to specify to reach this specific Inventory Part, we can finish specifying the key after the Revision number ends.

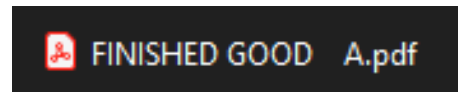


Figure 2 – Example of using a filename that does not include a field that comes at the end of the key

Some link types will require leading zero’s in some field in keys. This means that the entire field will need to be padded with the character “zero”. For example, if we wanted to specify Sales Order “8567” in the filename for the Sales Order number field, it would need to be written as “0008567” because Global Shop allows Sales Orders to have up to 7 characters. If the leading zeroes are not used on the corresponding fields, the link will fail, and the document will be attached to a value that does not exist.

Additional File Characters

After specifying the key characters in the file name, using an underscore will denote to the linking program that the key has been specified and some extra text can be used to give the filename a unique name. It may be useful to attach multiple of one file extension to one object in Global Shop. When a unique string is used after the file’s key in the filename, multiple of the same file type can be attached to the same object.

By specifying the file names in *Figure 3*, these two files will be attached to the same part as the file in *Figure 1*, but none of the files will conflict with one another. The linking tool will not allow files that have the same link type, group id, path, filename, extension to be attached more than once.

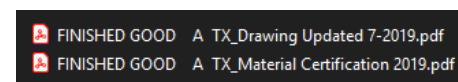


Figure 3 – Using text after an underscore to give a file a unique name so that multiple files that are the same type can be linked to the same object

By using the extra text after the underscore in the filename, unique filenames will allow multiple of the same file type to be added to an object.

Format Keys

Link Type #	Link Type Description	File Format
10	Vendor Master	• Vendor (6 characters)
11	AP Invoice	•
12	Contact	• Contact ID (9 characters no leading zeroes)
14	AR Cash Check/Ref Number	•
15	Customer Master	• Customer (6 characters)
17	Ship-To	•
18	Prospect	• Prospect (6 characters)
19	Suspect	•
20	Work Order Master	• Job (6 characters) • Suffix (3 characters)
25	Work Order Operation	• Job (6 characters) • Suffix (3 characters) • Sequence (6 characters with leading zeroes)
27	Project Master	• Project (7 characters)
28	Project Phase	• Project (7 characters) • Phase (4 characters)
29	Forecast	•
30	Inventory Master	• Part (20 characters) ⇒ <i>Alternate 1</i> : Part Number (17 characters) ⇒ <i>Alternate 2</i> : Revision Number (3 characters) • Location (2 characters)
31	Item Master	• Part (20 characters) ⇒ <i>Alternate 1</i> : Part Number (17 characters) ⇒ <i>Alternate 2</i> : Revision Number (3 characters) • Location (2 characters) • Lot (15 characters) • Bin (6 characters) • Heat (15 characters) • Serial (30 characters)
32	Warranty Master	•
35	Router/Estimate Master	• Router (20 characters) ⇒ <i>Alternate 1</i> : Router Number (17 characters) ⇒ <i>Alternate 2</i> : Revision Number (3 characters)
37	Router/Estimate Sequence	• Router (20 characters) ⇒ <i>Alternate 1</i> : Router Number (17 characters) ⇒ <i>Alternate 2</i> : Revision Number (3 characters) • Sequence (6 characters with leading zeroes)
38	Work Center	• Work Center (4 characters)
39	OP Code	• Operation Code (6 characters)
40	General Ledger Master	• GL Account (15 characters)
41	Fixed Assets	•
45	Sales Order Master	• Sales Order (7 characters with leading zeroes)
50	Quote Master	• Quote (7 characters with leading zeroes)
55	Employee Master	• Employee ID (5 characters)
60	Purchase Order Master	• Purchase Order (7 characters with leading zeroes)

61	Purchase Order Receipts	•
62	Vendor Quotes	<ul style="list-style-type: none"> • Part (20 characters) ⇒ <i>Alternate 1</i>: Part Number (17 characters) ⇒ <i>Alternate 2</i>: Revision Number (3 characters) • RFQ Number (6 characters with leading zeroes)
65	Configurator Master	•
70	Sales Order	•
71	Bill of Lading	•
75	Quality Master	• Quality Control Number (7 characters with leading zeroes)
76	Quality User Field 1	• User Field 1 (20 characters)
80	Engineering Change Notice	<ul style="list-style-type: none"> • ECN Prefix (1 character) • ECN Number (8 characters)
90	Master Event	•
91	Event	•
92	Opportunity	•
93	Sub-Opportunity	•
94	Request Number	•
95	CRM Tasks	•
96	CRM Campaigns	•
110	Work Flow Template	•
120	Work Flow	•
800	Part Etching	•

Custom Links

Global Shop allows for Custom link types to be used. These are only used by custom projects that would use the standard Global Shop system Document Link Control but for custom projects. If you think you have a custom project that uses custom link types, send a question to Global Shop support so the Global Shop team can check for you.