



Creating an Inventory Extract & Importing into Classic EIS

HCC will do a Configuration setup in Redesign:

- Under SYSTEM, Modules, click on the '+' to install the EIS Classic Integration module. Click on Refresh.
- Under SYSTEM, Configuration, edit the 'EIS Classic Integration Configuration' to enter a pending threshold amount and whether to extract both 5xx and/or 6xx object codes.

This procedure outlines the steps needed to create the inventory extract from Redesign and import into the Classic EIS pending file.

1. Go to Report > Report Manager > **Inventory Pending Extract Report**
2. Generate the Report.

- Format should stay as CSV as the output will be in the exact layout needed for the EIS import program
- Enter a Since Date (date of migration to redesign)

The screenshot shows a 'Generate Report' dialog box for the 'SSDT Inventory Pending Extract' report. The dialog is titled 'Generate Report' and has a subtitle 'SSDT Inventory Pending Extract'. It contains several sections: 'Save and Recall' with a dropdown menu; 'Report Options' with a dropdown menu set to 'Comma Separated Values'; 'Page Size' set to 'Letter'; 'Orientation' set to 'Portrait'; 'Name' set to 'InventoryPendingFile'; 'Summary Report' checkbox (unchecked); 'Query Parameters' section with two empty text boxes; and a 'Generate Report' button. There is also a 'Since Date' field and a note: 'Report for a specific posting period (blank means current period). A date or a shortcut can be used'.

3. Save the output file.

Note: If you do decide to delete line items from the spreadsheet before loading to PowerTerm, be careful *not to delete* the header row.

Note: If correct inventory is *not* generated by the **Inventory Pending Extract Report**, or additional items not captured, please use the Report > Report Manager > **EIS - Catch up extract for inventory items**. Otherwise, skip to Step 5.

4. When running Report > Report Manager > **EIS - Catch up extract for inventory items**, under Query Options:

- Enter the Object codes (i.e., 500-699)
- Enter a Start and End Date for invoices and a Threshold Amount.
- Click Generate Report.
- The output file will be in the exact layout needed for the EIS import program, as a CSV file with headings.

5. FTP the file to your PTR in Classic (HCC will assist, if needed).
6. In PowerTerm, the name of the imported file may show some added characters as in the following example, where the name is even too long to display the version number after the semicolon (ex: ;1).

```

1   EISIMPR.TXT ;3
2   INVE. 29$5N20$5NCSV ; 1
3   INVENTORYPENDINGFILE$7A$5H4$5I .CSV ;
4   SPLTAG.TXT ;2
  
```

The exact name of the file will need to be entered on the import screen (see next step).

Two choices for handling this issue:

- Highlight the full name (but not the semicolon) of the file in the PTR listing (that acts as a "copy"). Then, on the EISIMPR screen, move your cursor to the "Import File" field and right-click your mouse button (acts as a "paste").
- OR
- In the PTR, press R to Rename the file to a shorter name (ex: INV_PEND_EXTRACT.CSV).

7. In PowerTerm, at the Menu prompt, type: **EISIMPR** Enter the import file name and execute the program

- All items from the extract file will then post to the EIS Pending File.

8. Review the output file [EISIMPR.TXT](#) in your PTR for any errors.
9. Go to EISSCN > PENDING or run an EIS501 report to confirm the items are on the Pending File.
10. Continue processing inventory as you normally would, pulling the items from the EIS Pending File. See classic EIS closing procedures.