

Import Text File Layout

This file holds a list of policies, each having one Record Type 01, followed by zero or one Record Type 02, followed by zero or more Record Type 03's, followed by zero or more Record Type 04's, followed by zero or more Record Type 05's. The last record in the file must be a control record (Record Type 99), and there can be only one of these. It holds the total number of policies in the file, as well as the total number of records in the file. This aids in checking the integrity of the file.

All records for each policy must be grouped together in ascending order. Here is an example of an acceptable order of record types: 01, 02, 03, 03, 05, 01, 03, 01, 02, 03, 03, and 99.

This format is fixed-width, with the exception of fields whose size is given as "VAR" (variable). Fields are padded with spaces to achieve the required sizes. There is a carriage-return linefeed combination at the end of each record (ASCII 13 and ASCII 10). This is to assist in file readability in a text editor, for debugging purposes.

The layout utilizes the following field types:

Type	Fixed Size	Description
Text	--	String of alphanumeric characters with a length equal to "Size". This field can contain carriage returns and linefeeds. Examples: Joe's Bar & Grill, 02809-0104
Date	10	String in the form "MM/DD/YYYY". Examples: 01/31/1997, 12/01/2006
Long	11	String of digits with an optional negative sign. The range of values is -2147483648 to 2147483647. This is an integer, so a decimal point will not exist. Examples: 1240, -10000, 0, 2147483647
Float	18	String of digits with an optional negative sign and/or decimal point. The range of values is 16 significant digits. Examples: -1240.01, 10000, 0, 15.7878, -1234567890.123456

Each record type format is listed below. Information specific to each record type is provided where necessary.

Record Type 01 - Main			
Name	Type	Size	Description
Record Type	Text	2	01
Update Code	Text	2	0 - Add new case, 1 - Update existing case, 2 - Cancel case
Insured Name	Text	50	Insured info...
Insured Address 1	Text	30	
Insured Address 2	Text	30	
Insured City	Text	30	
Insured State	Text	2	Two letter abbreviation
Insured Zip	Text	12	Include dash (-) in zip+4
Insured Phone #	Text	20	
Insured Fax	Text	20	
Insured E-mail	Text	50	
Insured Federal ID	Text	15	
Insured Legal Entity	Text	30	
Audit Location Name	Text	50	Audit location info...
Audit Contact Name	Text	30	
Audit Address 1	Text	30	
Audit Address 2	Text	30	
Audit City	Text	30	

Audit State	Text	2	Two letter abbreviation
Audit Zip	Text	12	Assigning zip code (Include dash (-) in zip+4)
Audit Phone #	Text	20	
Audit Fax	Text	20	
Audit County	Text	30	
Audit Period Start Date	Date	10	
Audit Period End Date	Date	10	
Audit Type Code	Text	2	0 - Annual, 1 - Cancellation, 2 - Interim, 3 - Mail, 4 - Pre-audit, 5 - Re-audit, 6 - Other
Audit Source Code	Text	2	0 - Physical, 1 - Telephone, 2 - Mail, 3 - Other
Policy Number	Text	50	
Policy Type	Text	2	0 - Workers Compensation, 1 - General Liability, 2 - Dealer, 3 - Garage, 4 - Survey
Policy Insurance Company	Text	30	
Policy Period Start Date	Date	10	
Policy Period End Date	Date	10	
Policy Code	Long	11	Company-specific policy codes
Estimated Premium	Float	18	Assigning premium
Agency Name	Text	50	Agent info...
Agent Contact Name	Text	30	
Agent Address 1	Text	30	
Agent Address 2	Text	30	
Agent City	Text	30	
Agent State	Text	2	
Agent Zip	Text	12	
Agent Phone	Text	20	
Agent Fax	Text	20	
Agent E-mail	Text	50	
Serial Number	Text	20	Company-specific number
Priority Flag	Text	1	Y for yes or N for no
Correction Return Flag	Text	1	Y for yes or N for no
Non-productive Flag	Text	1	Y for yes or N for no
User Flags	Long	11	Up to 32 bit flags – flag #1 is least significant
Parent Name	Text	50	Optionally set Parent. Name must match exactly with Parent in Inventory
Assignment Code	Text	2	0 - MANUALASSIGN, 1 - AUTOASSIGNFULL, 2 - AUTOASSIGNGROUP, 3 - UNASSIGN, or 4 - ARCHIVE (Usually 1)
Child Name	Text	30	Name of the child to assign the case to if manually assigning. Name must match exactly with Child in Inventory (Usually empty)
Child Group Code	Long	11	The child group code to assign the case to. This value is only used if assigning manually, automatically assigning within a group, or un-assigning within a group. Valid child group codes are: 1 - Auditors, 2 - Billers, 3 - Exporters, 5 - Printers, 6 - Reviewers, 7 - Schedulers, 8 - Archive (Ignored if Assignment Code is 1)
Update Query Insured Name Flag	Text	1	If the Update Code is 1 or 2, you must specify which fields are queried in the Inventory to locate the existing case. Set to Y for yes, if the Insured Name field is used in this query, otherwise set to N for no
Update Query Policy Number Flag	Text	1	Y for yes or N for no (see above)
Update Query Policy Type Flag	Text	1	Y for yes or N for no (see above)
Update Query Policy Period End Date Flag	Text	1	Y for yes or N for no (see above)
Update Query Policy Insurance Company Flag	Text	1	Y for yes or N for no (see above)
Update Query Policy Code Flag	Text	1	Y for yes or N for no (see above)
Update Query Serial Number Flag	Text	1	Y for yes or N for no (see above)
Update Query Audit Type	Text	1	Y for yes or N for no (see above)

Code Flag			
-----------	--	--	--

Record Type 02 - Memo			
Name	Type	Size	Description
Record Type	Text	2	02
Memo Text Length	Long	11	Length of memo in bytes – maximum of 4,096
Memo Text	Text	VAR	Text for memo

Record Type 03 - Policy Detail			
Name	Type	Size	Description
Record Type	Text	2	03
Label	Text	30	Label for this Policy Detail Page (i.e. Claims)
Page Text Length	Long	11	Length of page text in bytes – maximum of 65,536
Page Text	Text	VAR	Text for page

Record Type 04 - Progress Report			
Name	Type	Size	Description
Record Type	Text	2	04
Author	Text	50	
Date Entered	Date	10	
Is Internal	Text	1	Y for yes or N for no – Progress Report never sent to Parent
Comments Text Length	Long	11	Length of comments text in bytes – maximum of 200
Comments Text	Text	VAR	Text for comments

Record Type 05 - Attachment			
Name	Type	Size	Description
Record Type	Text	2	05
Name	Text	80	
Document Type	Text	2	0 - Audit, 1 - Survey, 2 - File (Other), 10 - Audit Import File
File Name	Text	250	Name of file if document type is 2 – File. Do not include path information
Is Default	Text	1	Y for yes or N for no. Set if this attachment should be the case's default
Should Print	Text	1	Y for yes or N for no. Set if this attachment should print
Attachment Data Length	Long	11	Length of the attachment's binary data in bytes – no maximum
Attachment Data	Text	VAR	Attachment's binary data

Record Type 99 - Control Record			
Name	Type	Size	Description
Record Type	Text	2	99
Record Count	Long	11	Total number of records in file, including this one
Policy Count	Long	11	Total number of policies in file