

Compano Online Software

Manual Periodic Tasks Compano Online Software

Version 1.2

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1 Introduction

This manual describes the use of Periodic Tasks to automate certain COS-processes, such as Import, Export 2BA, Export, Feed export, etc.

1.1 Concepts

COS

Compano Online Software application. Version of the COS-application are, for instance K05, L02, L03, etc.

PIM

Product Information Management system, used to manage product and item data. Data can be communicated to data pools, product websites, catalogues, web shops, etc.

Shared application

Your own COS-environment, which shares a database and application with other Compano customers.

Entity

Data object in COS, for instance Product, Item, Assortment, Attachment, Price, etc. For most entities in COS an overview has been created.

Record

One instance of a data object in COS, for instance one product or one item.

Data field

One field containing data, such as a price in Euros, Diameter in millimetres, etc.

Import

Import of data into data fields in COS.

The data source is often an Excel or text-based data file, but could also be a data file which makes use of (international) *standard exchange standard*, such as DICO (INSBOU/SALES), BMEcat, FAB-DIS, etc.

Export

Export of data out of data fields in COS.

The export is often an Excel or text-based file. but could also be a data file which makes use of (international) *standard exchange standard*, such as DICO (INSBOU/SALES), BMEcat, FAB-DIS, etc.

Standard exchange format

Several standard formats have been defined to exchange data for the construction and engineering sector, for example: PAB, DICO/SALES, BMEcat, FAB-DIS. These Data Exchange Standards facilitate the sharing of structured data across different information systems.

Import layout

Layout for importing data into of COS. Import layouts can be customized by the user.

Export layout

Layout for exporting data out of COS. Export layouts can be customized by the user.

Delta import

A *Delta Import* compares data in the source file with data in COS. On import only new or changed data is imported.

Full import

A *Full Import* compares data in the source file with data in COS. All data in COS is overwritten with data from the import file.

Feed

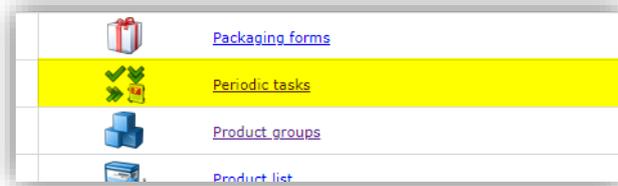
A data feed in the XML- or JSON-format, used for exporting data from COS.

2 Periodic tasks

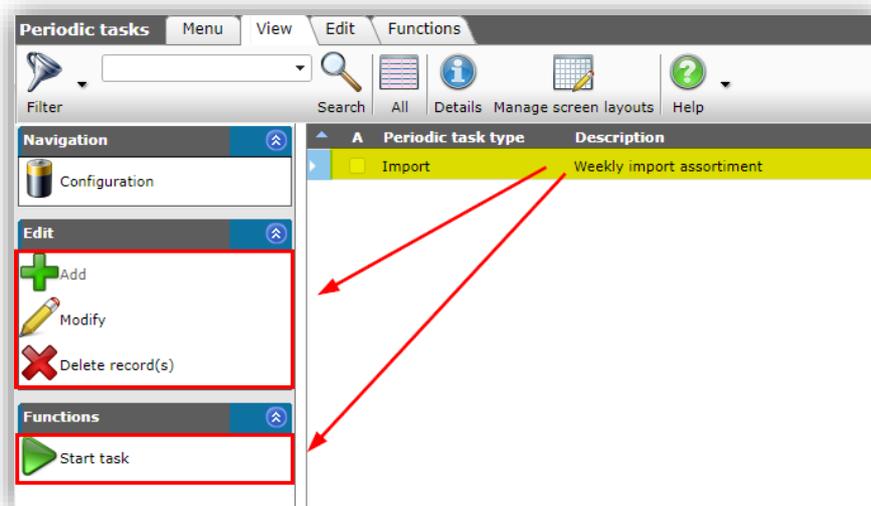
Automation of certain tasks such as daily or weekly Imports or Exports can save considerable time. This can be accomplished by configuring Periodic Tasks. These tasks can be set to run automatically, according to a set *frequency* and *time*, during the server off-hours (night and early morning), with some time excluded for server maintenance. Tasks can also be *started* and *stopped* manually.

System tasks take precedence over tasks set by the user. Tasks can also be allotted a sequence number to indicate in which order the tasks should be run, thus allowing for task dependency.

Periodic tasks can be set up (and started) under *System > Configuration > Periodic tasks*.



The overview of Periodic tasks allows for *Adding*, *Modifying*, *Deleting* and (manually) *Starting* a task:

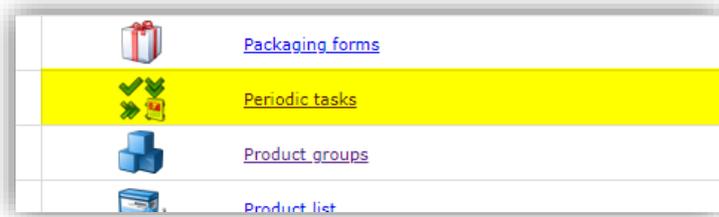


2.1 Adding a task

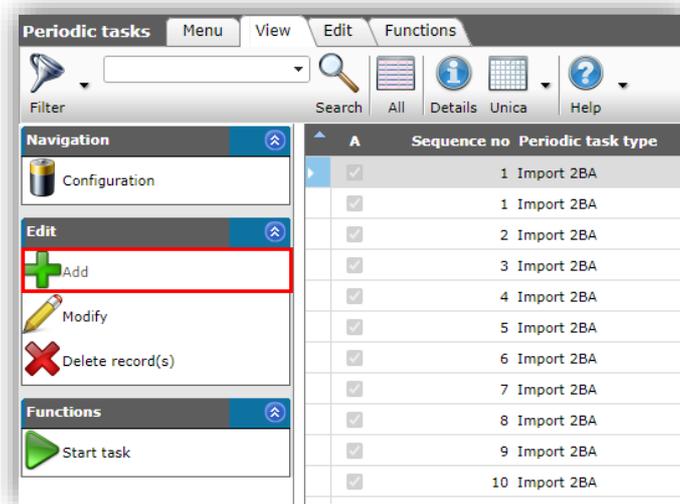
Several, different kinds of Periodic Tasks are available, each geared towards a specific *type* of task. For an overview, see: [2.2.2 PERIODIC TASK TYPE](#).

To add a Periodic Task:

1. Through the Menu, go to *System > Configuration > Periodic tasks*.



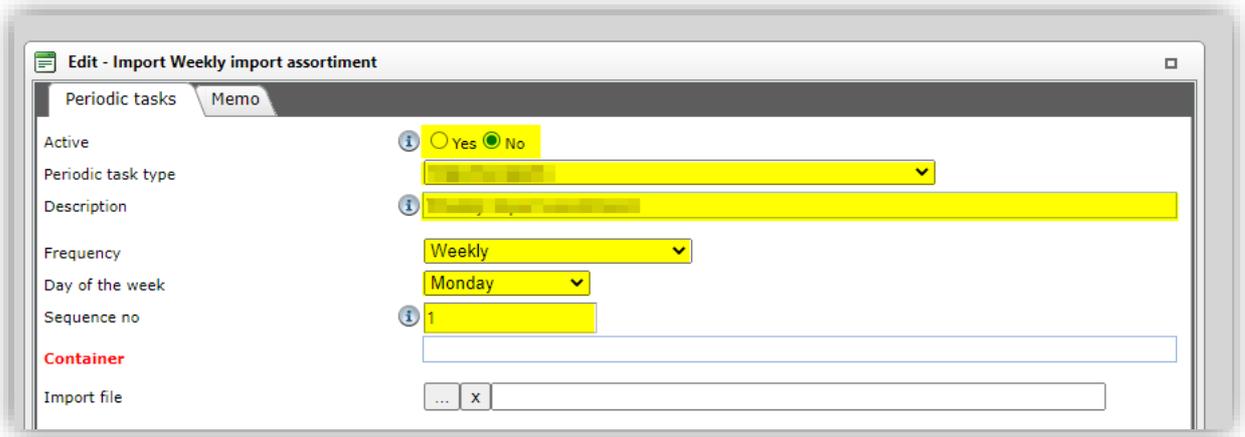
2. Under Edit, click on *+Add* to add a new task:



3. In the pop-up window, fill out the settings and options for the task:
 - a. See paragraph [2.2 COMMON SETTINGS](#)
 - b. And, for detailed settings, see chapter [3 ADDITIONAL SETTINGS PER PERIODIC TASK TYPE](#)

2.2 Common settings

Common settings need to be filled out for each type of Periodic Task:

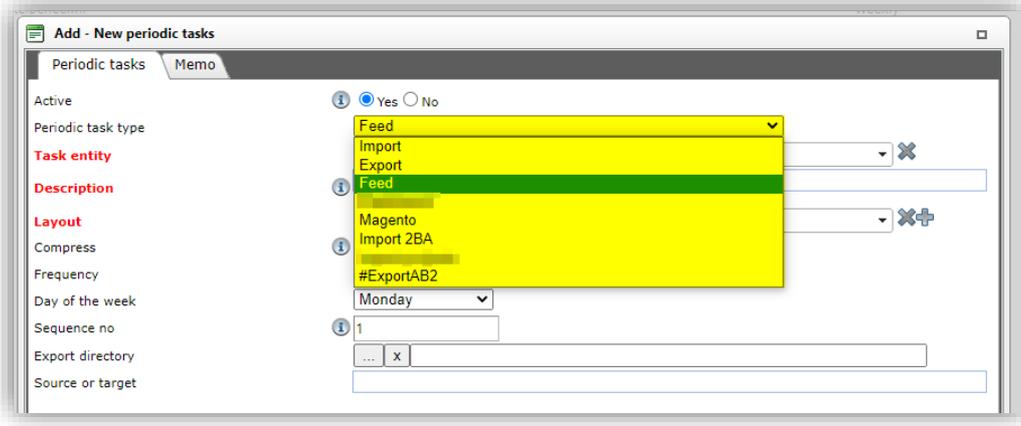


2.2.1 Active

Active: Set to **Yes** to run the scheduled task automatically with the set frequency and at the set time. When set to **No**, the task is (temporarily) disabled.

2.2.2 Periodic task type

Periodic task type: The task type determines what kind of task is to be performed. The following common task types are available¹:



- Import: Import Item or Product data
- Export: Export (Item) data using a specific exchange or custom format
- Feed: Export a pre-defined data feed (XML only)
- Magento: Export for the *Magento*[®] e-commerce platform (web shop)
- Import 2BA: Import any assortment available through data pool 2BA. Note: Only available with module 2BA.
- Export Artikelbeheer: Export any assortment to data pool Artikelbeheer.nl Note: Only available with module Artikelbeheer.nl.

¹ Other task types are available on request. Please contact sales@compano.com for options and pricing.

2.2.3 Description [required]

Description: Type a *Description* for the periodic task. For instance: **Weekly import of sales conditions for APAC.**

2.2.4 Frequency

Frequency: Set the frequency with which the task is to be executed. Options are:

- Daily: The task is scheduled daily during server off-hours. Note: Daily tasks will only be started *after* their nightly recycle has finished.
- Interval: The task is scheduled according to an interval period; you will have to set the interval period in minutes.
- Weekly: The task is scheduled weekly. Additionally, you will have to select which *Day of the Week* the task will be performed.
- Biweekly: The task is scheduled every two weeks; you will have to specify *two Days of the month* at which the task is to be executed.
- Monthly: The task is scheduled monthly. Additionally, you will have to enter which *Day of the Month* the task will be performed.
- Time of day: The task is scheduled daily at a time of your choosing ; you will have to enter the exact *Time* at which time the task is to be performed.

2.2.4.1 Time

Some remarks considering time:

- Time for Periodic tasks needs to be specified in the 24-hour format, for instance **12:53**.
- Periodic tasks can be scheduled between 23:00 and 6:00 hours *only* (!). The remaining hours are reserved for server maintenance.
- *System tasks take precedence* over tasks set by the user. Therefore, periodic tasks only start *after* the system task(s) have finished.
- Execution of some tasks can take up considerable time. To reflect this, an *end time* is set after the task has been completed. Should the next task include any data that was affected by the previous task, this task will be performed taking into account all data changes as of the end time that was set.

2.2.5 Sequence no

Certain tasks can be dependent upon completion of an earlier task. Setting the *Sequence no* of a task, allows for ordering tasks. Simply, enter an order number for task. Tasks are executed in ascending order by sequence number.

Example

Products are imported from a CSV file as a first task (sequence no. 1). As a second task (sequence no. 2), Items are imported from a CSV file. The import order is important, as Items cannot be linked to Products if the Product information is not imported first.

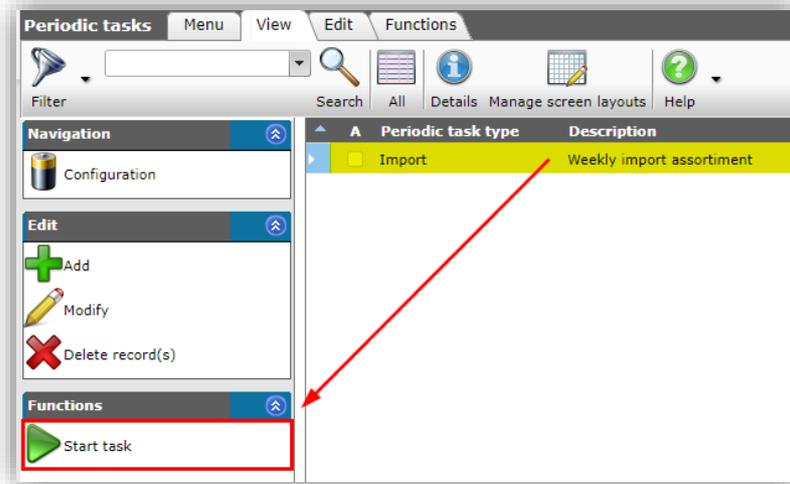
2.3 Starting and stopping tasks

Periodic tasks can also be started and stopped manually.

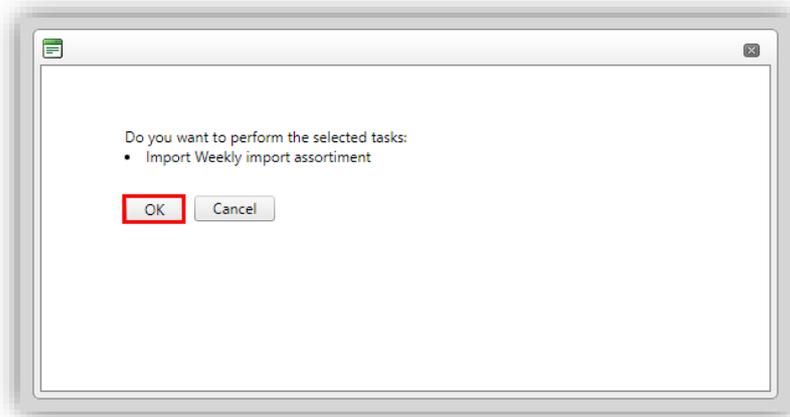
2.3.1 Starting a task manually

To start a task manually:

1. Through the Menu, go to *System > Configuration > Periodic Tasks*.
2. In the overview, select the task that you need to start and, under Functions, click on *Start*.



3. The application will ask for confirmation in a pop-up window:

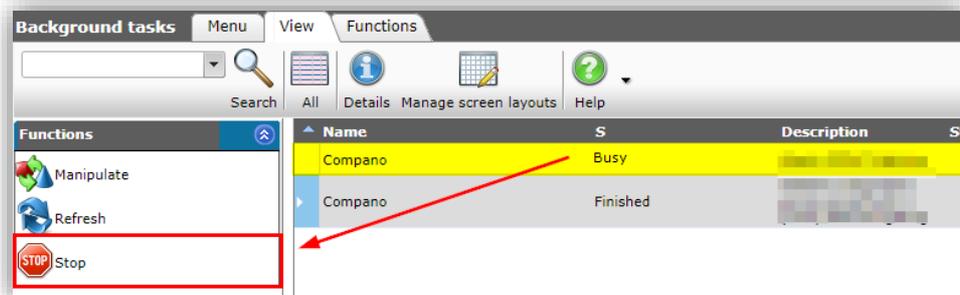


4. Click on *OK* to start the task.

2.3.2 Stopping a task manually

A running task can be stopped manually:

1. Through the menu, go to *System > Background tasks*.
2. Select the task to be stopped and, under Functions, click on *Stop*.



3. Soms tasks are stopped immediately, other tasks will run in 'blocks' and will be stopped after the running 'block' has finished processing.

3 Additional settings per periodic task type

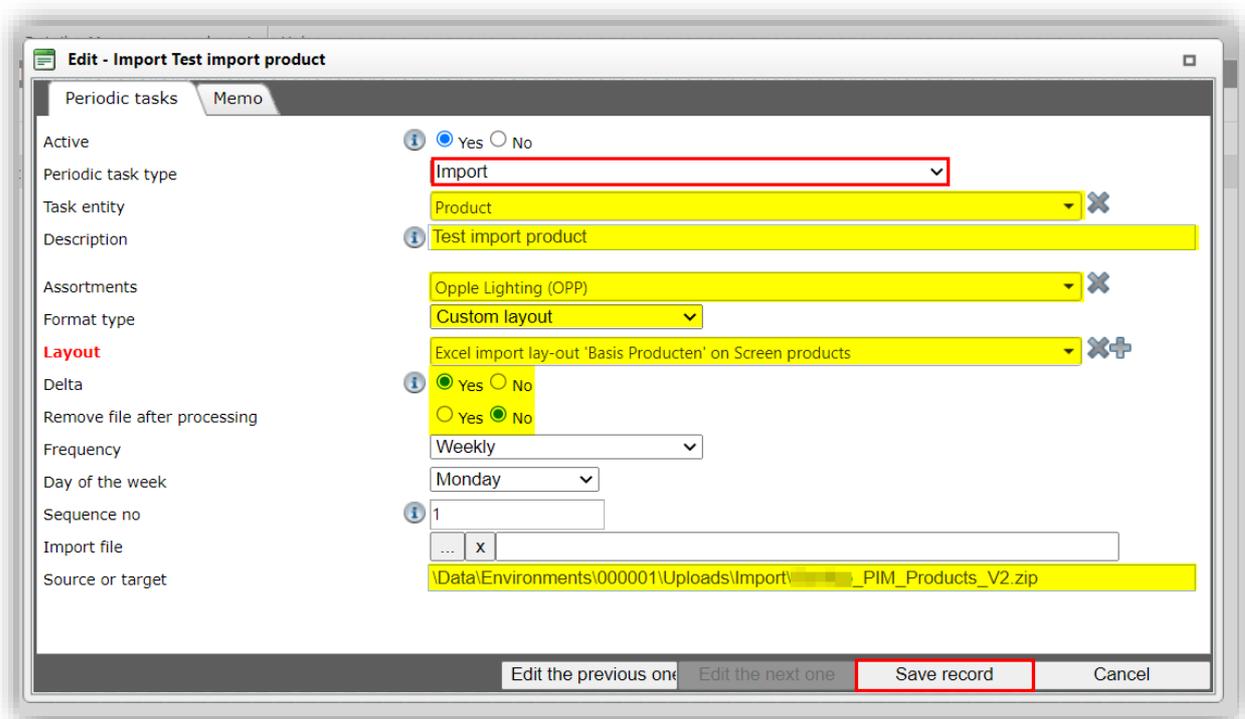
Depending on the task type, additional options need to be set.

Note: Common settings are discussed in paragraph [2.2 COMMON SETTINGS](#)

3.1 Import

The *Import task type* can be used to import data using the custom formats *Excel*, *CSV*, or *Unicode*.

To be able to make use of the Import type periodic task, you will need to apply for a second FPT(S) account for uploading data. Note that this is a paid service; for options and pricing, please contact sales@compano.com



Settings:

- Periodic task type: Select the type **Import**
- Task entity (required): Select the entity, for instance Product or Item, for which data will be imported.
- Assortments (optional): Select the assortment for which the data needs to be imported. Note: This is an optional choice, dependent upon the selected task entity.
- Format type: When importing data from an external FTP server, set the format type to: **Industry standard**. Alternatively, for industry standard files the Compano FTP server can be used in combination with the the *AutoImport* option. See the *Manual Universal Import / Export, Appendix C*, which is available from the [Compano Help website](#). Set the Format type to **Custom layout** when using a custom data file and custom import layout.
- Delta: Set to **Yes** to import only new or changed data, as compared to data already present in your COS application. Set to **No** for a full import. Important: When set to **No**, existing data

in COS will be *overwritten* and any existing records which are not present in the import will be *archived* (!)

- Remove file after processing: Set to **Yes** to remove the imported data file from the Compano server after processing.
- Import file: Upload and/or manually select a data file on the Compano FTPS server, that is to be used for import.
- Source or target: Set an external (S)FTP(S) location for the data file that is to be used for import (Source). Note: FTPS login fields will appear when the source is set to an external source.

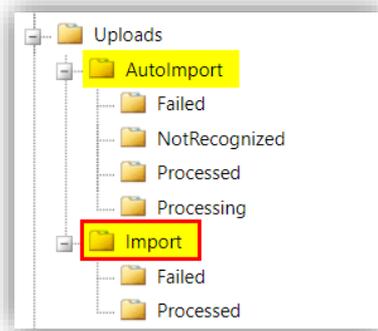
Important: Either select an Import file or set a Source for the import; never use both options.

3.1.1 Custom layout

The format type **Custom layout** assumes that you will offer:

- A data file for import (Excel- CSV, or TXT-format)
- A custom import layout

The Import data file can either be uploaded and selected manually, or the File Transfer Protocol (FTPS) can be used to transfer the data file to the COS server. In both cases, a default upload location is to be used:

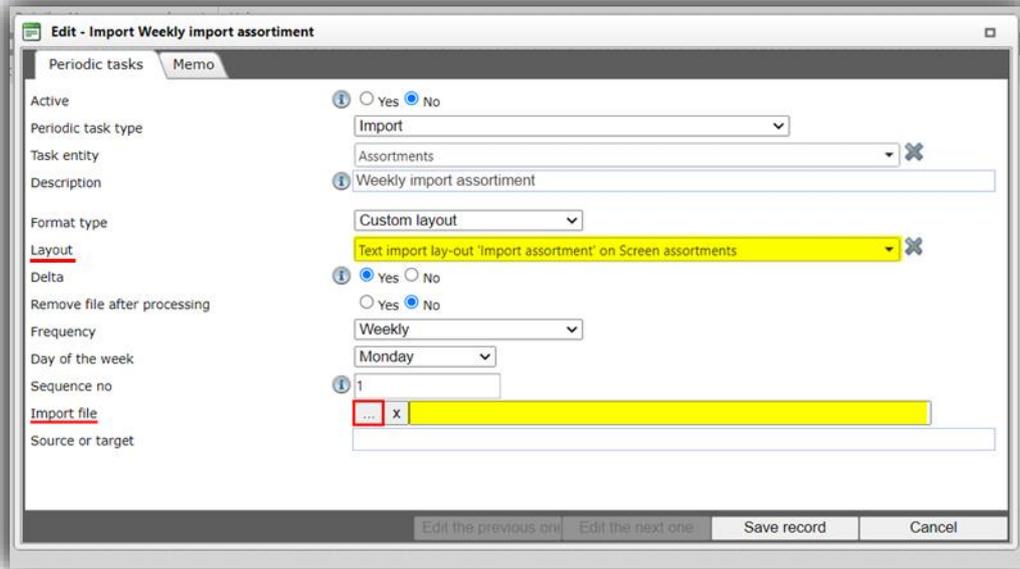


The custom import layout should be prepared beforehand through *System > Layouts*. Please refer to the *Manual Universal Import/Export* for a detailed explanation, which is available from the [Compano Help website](#).

3.1.1.1 Manual upload

To manually upload a data file:

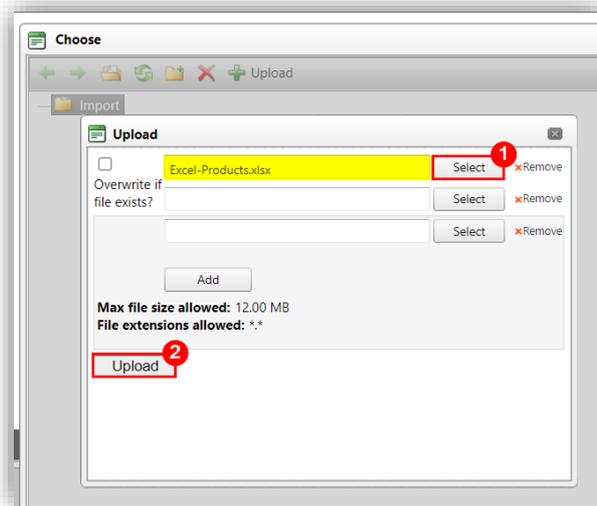
1. On the Periodic task Edit pop-up window:
 - a. Layout: Select a prepared Import layout that fits your import file.
 - b. Import file: click on the -button:



c. In the next pop-up window, click on *+ Upload*.

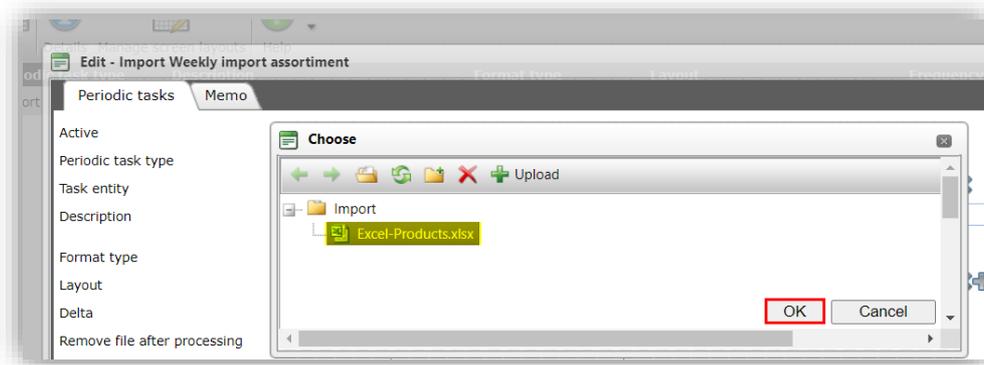


d. *Select* (1) a data file from your PC/laptop/server:

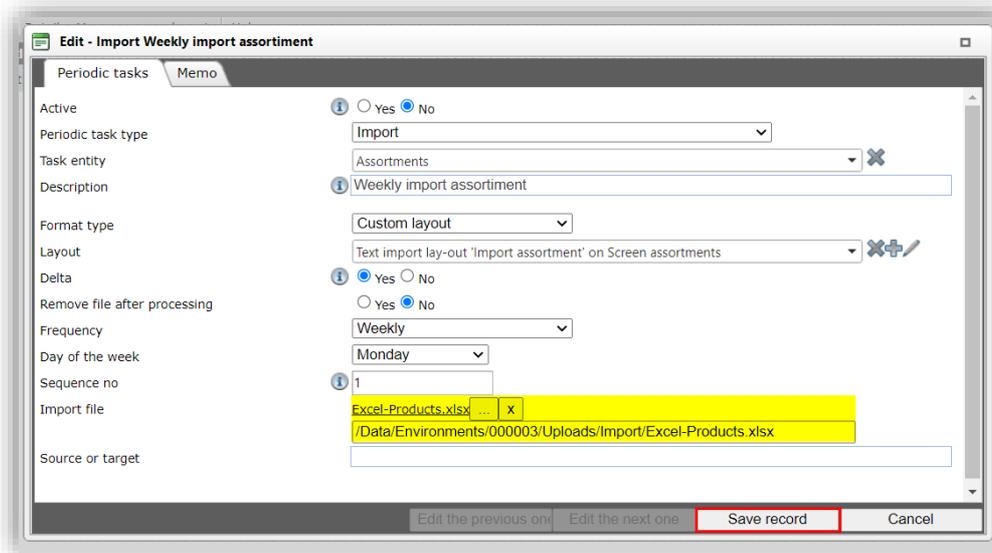


e. Click on *Upload* (2).

f. Select the uploaded data file and click on OK:



2. The import data file location has now been set:



3. Click on *Save record*.

3.1.1.2 FTPS upload

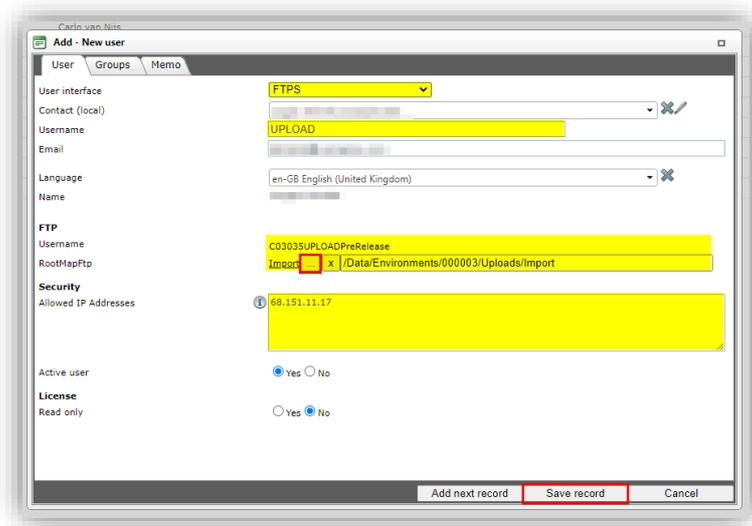
Data files for import can also be upload through FTPS. This way imports can be automated provided that any new data files that are uploaded to the Compano server always have the *exact same filename*.

Important: For uploads through FTPS, an *extra* FTPS user account is needed, which is a *paid service* Please contact sales@compano.com for information on options and pricing and inform your customer.

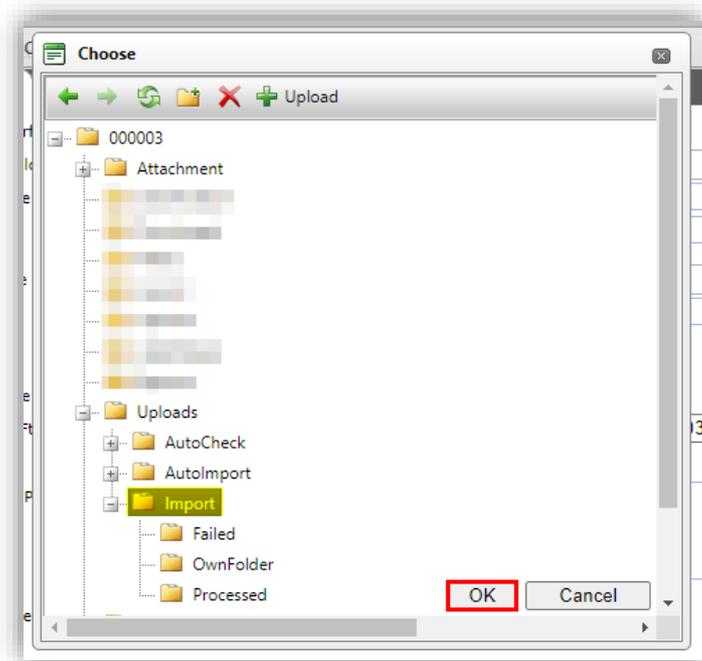
Example

First, add a (new) FTPS user account; also see the [Technical Documentation FTPS](#):

1. Make sure to manually add an **Uploads** folder and, optionally, any subfolders for data files, for instance **Import**; also see the [Technical Documentation FTPS](#).
2. Next, set the FTPS root folder to, for instance:
/Data/Environments/[Environment_Number]/Uploads/[Import]
 - a. In the Add new user window, next to *Rootmapftp*, click on the  -button:



b. In the pop-up window, open the *Uploads* folder and select the *Import* folder:



- c. Click on OK to set the root folder.
3. Optional: Set or change any security options².
4. Save the FTPS user record.

Now, make sure to upload a (custom) data file for import to the *Uploads/Import* folder, using the FTPS login details of the extra FPT user account³:

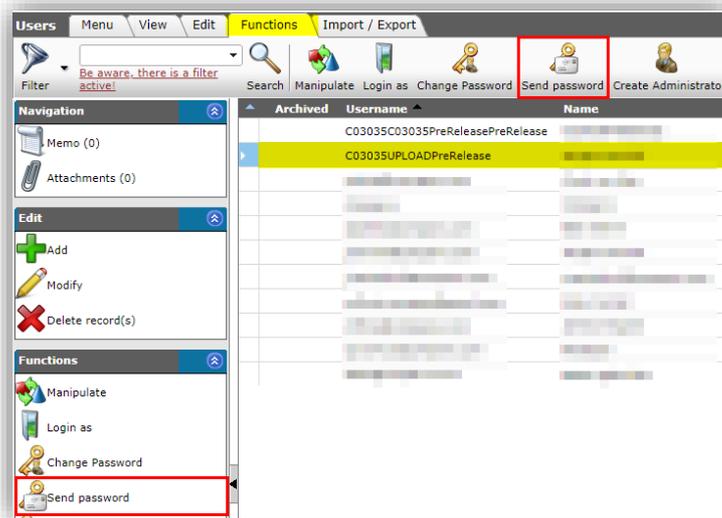
- Username: Through the Menu, go to *System > Users*. You will find the username of the FTPS account in the Overview:

² List the IP addresses from which FTP can be used. This is mandatory as of April 1st, 2023.

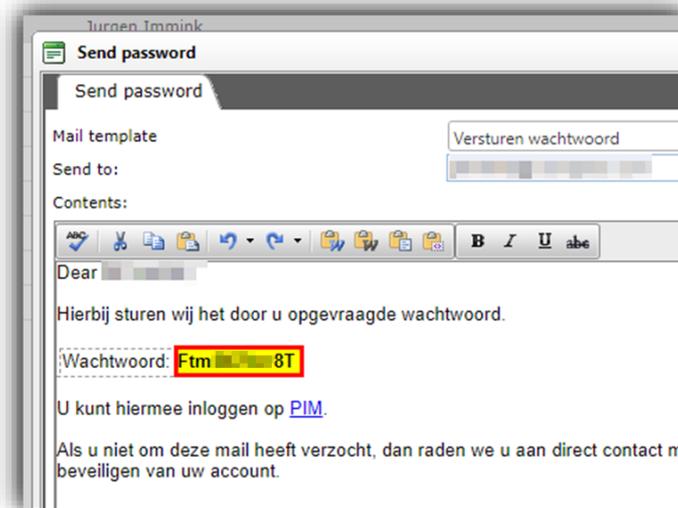
³ The login details of your FTPS upload account should have been provided by your Compano Consultant.

Archived	Username	Name
	C03035C03035PreReleasePreRelease	
	C03035UPLOADPreRelease	
	cdenijs@compano.com	
	Compano	

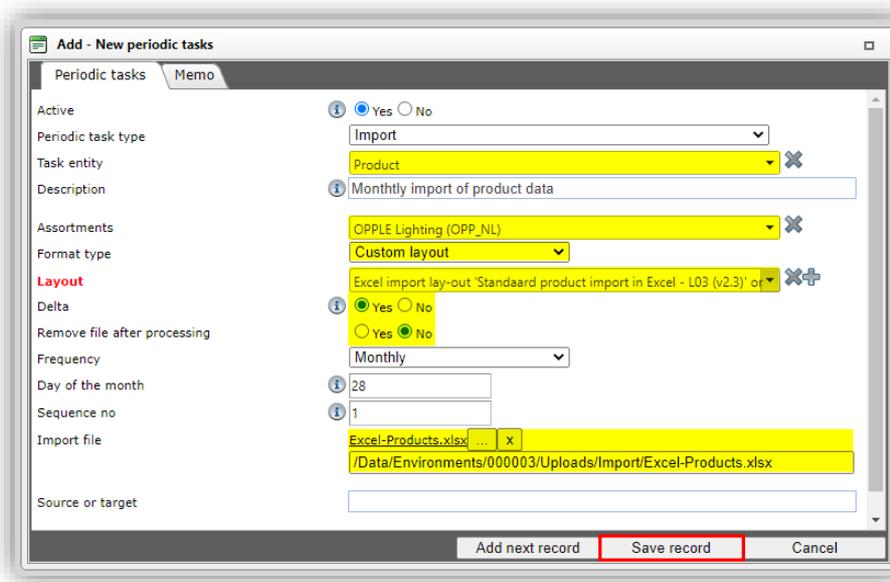
- Password: In the User Overview, select the FTPS upload account and, under Functions, click on *Send Password*.



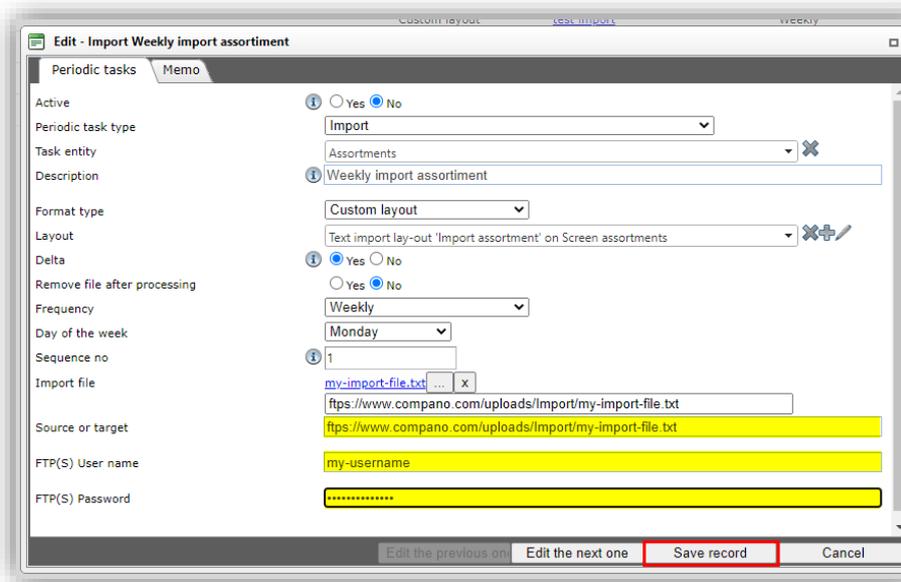
The password will be displayed in the pop-up window:



Next, prepare a (new) Periodic Task of type *Import*:



- Task entity: Select the entity for which you are importing data.
- Assortments: Select an assortment for which you are importing data.
- Format type: Select the format **Custom layout**
- Layout: Select the correct Import layout.
- Delta: Set to **Yes** to only import changes. When set to **No**, all records that are not in the file are marked as **Archived** in the database.
- Remove file after processing: Set to **Yes** to remove the data file from the Compano server. When set to **No**, the file will remain on the Compano server.
- Import file: Use the  -button to select a data file for import from the *Uploads > Import* folder⁴.
- Source or target: Alternatively, first enter an external FTP location and enter the FTP login details in the fields that appear. Note: make sure to specify the complete path to the import file:



⁴ When uploading new, updated data files make sure that the file name stays exactly the same, otherwise the import will fail.

- i. (S)FPT(S) Username: Enter the FTP(S) username.
 - ii. (S)FTP(S) Password: Enter the FTP(S) password.
5. Save the record.

3.1.2 Automated imports [industry standard data]

Automated imports of *Industry Standard data* files (PAB, DICO/INSBOU, DICO/SALES, BMEcat) from and *external FTP-location* can also be automated, using FTPS and the folders **AutoImport** and **AutoCheck** under the folder **Uploads** on the Compano server. This kind of automation does *not* make use of Periodic Tasks. See the [Manual COS Basics](#), [Manual Universal Import/Export](#) and/or the [Handleiding Aanleveren data aan Artikelbeheer.nl](#) for further information.

Important: For (automated) uploads an *extra* FTPS user account is needed, which will give you access to the folder **Uploads**; any additional folders should be added under this **Uploads** folder. Please contact sales@compano.com for further information on options and pricing.

3.1.3 Interdependent imports

Some data types, such as Contacts or Product Groups, require multiple, interdependent imports and thus multiple periodic import tasks, which also need to be started in a particular order.

The order in which Periodic Tasks are started can be set by filling out the Sequence Number. Also see: [2.2.5 SEQUENCE NO.](#)

Examples

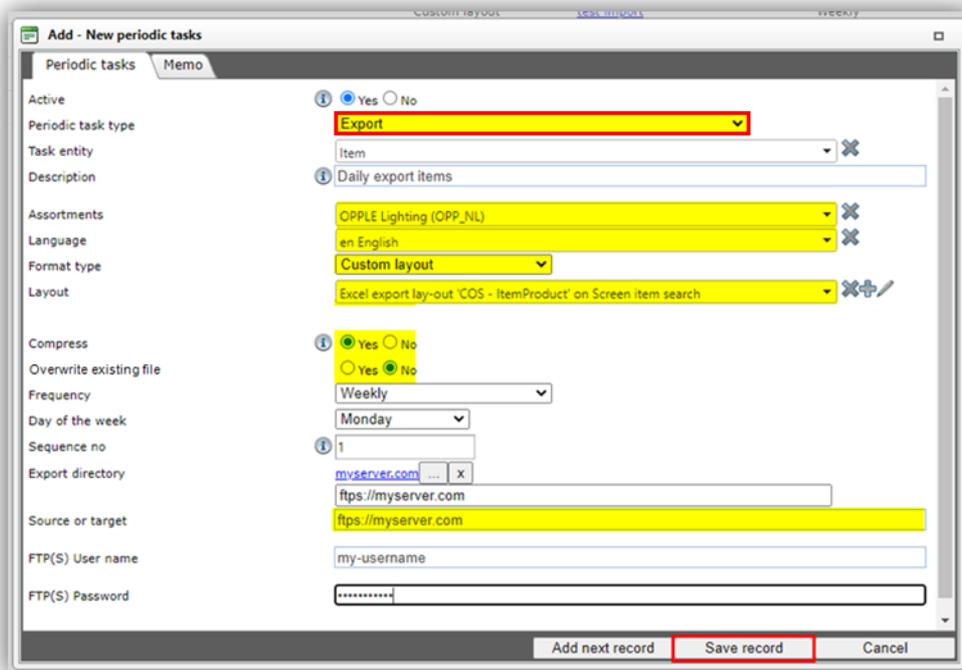
Contacts can be added to Organisations. To import Contacts for new Organisations, first a periodic task for the organisations need to run, after which the contacts can be imported with a second periodic task which runs *after* the first task has finished.

Another example would be the import of new Items and Products; as items are linked to products, the Item import task needs to run *after* the Product import task.

3.2 Export

The *Export task type* can be used to export data using the following formats:

- PAB
- DICO/INSBOU
- DICO/SALES005
- BMEcat
- Custom layout (XLSX, CSV or Unicode-TXT)



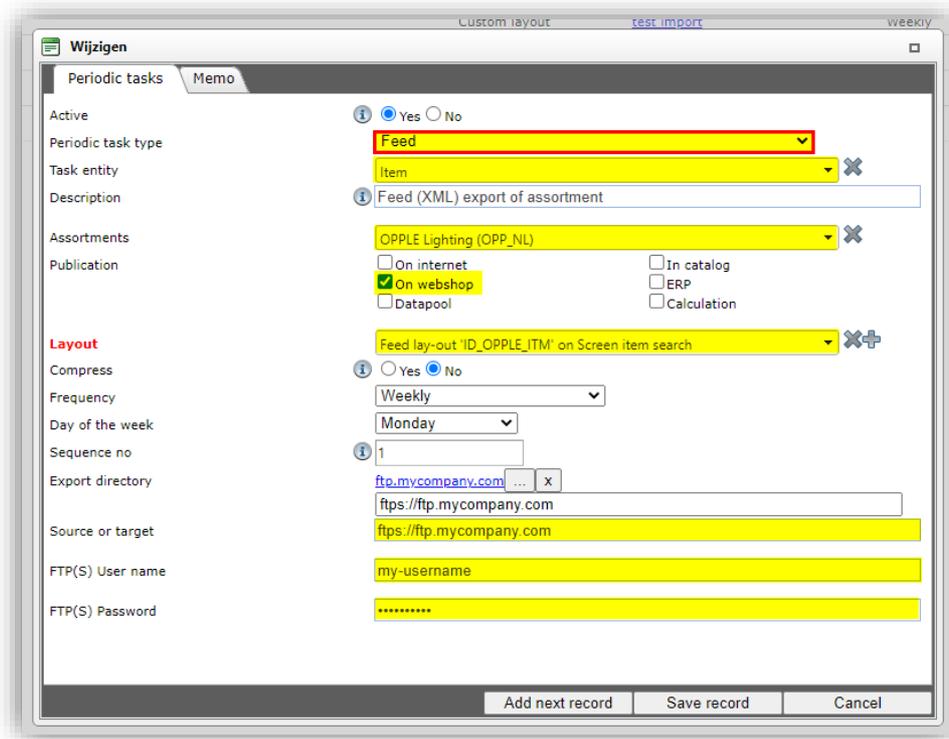
Settings:

- Task entity: Select the Entity (Item, Product, Assortment, etc.) for which the data is to be exported. Note: Further settings will depend upon this selection; the example here is for the entity *Item*.
- Assortment: Select an Assortment.
- Language: Select the language of the data to be exported; leave empty to export *all* language data.
- Format type: Select an export layout; either an industry standard or a custom layout.
- Layout: For a custom layout, select an export layout. Note: Export layouts can be added through *System > Layouts*.
- Compress: Set to **Yes**, to export a compressed (zipped) data file. Note: The data file will be **exported (compressed) to the application's Download folder**. When set to **No**, the file will be decompressed.
- Overwrite existing file: Set to **Yes**, to allow overwriting of an earlier exported file with the same filename.
- Export directory: Select an Export directory, alternatively you can set an external target directory (FTPS-location).
- Source or target
 - FTP(S) username: Enter the FTP(S) username for the target location.
 - FTP(S) password: Enter the FTP(S) password for the target location.

3.3 Feed

Use the *Feed task type* to schedule the export of data according to a feed layout.

Note: This is for exporting XML feeds only.

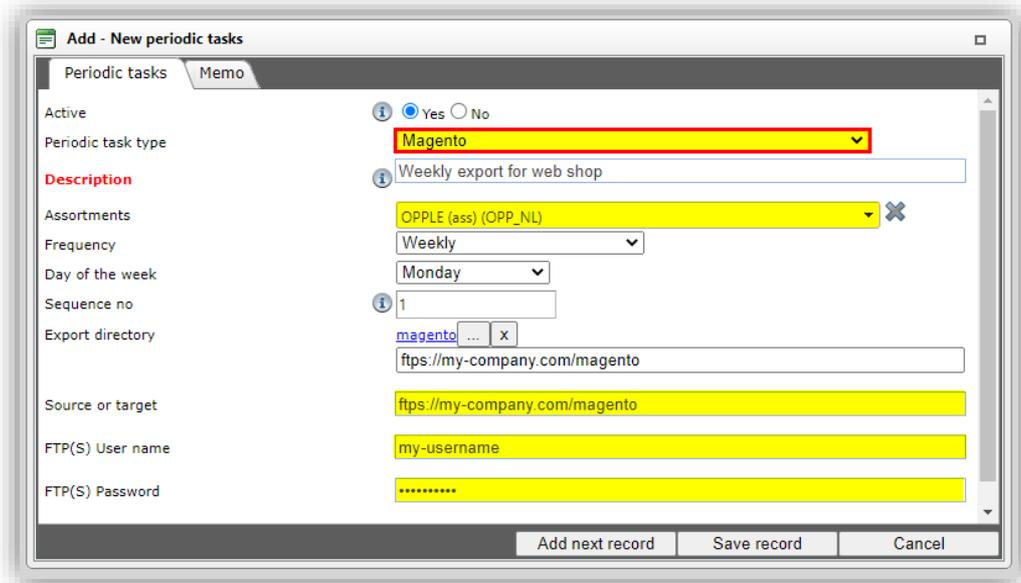


Settings:

- Task entity: Select the Entity (Item, Product, Assortment, etc.) for which the data is to be exported. Note: Further settings will depend upon this selection; the example here is for the entity *Item*.
- Assortment: Select an Assortment.
- Publication: Select the publication type of the Items that need to be exported in the feed.
- Layout: Select the Feed Layout for the Feed. Note: Feed layouts can be added through *System > Layouts*.
- Compress: Set to **Yes**, to export a compressed (zipped) data file. Note: The data file will be **exported (uncompressed) to the application's Download folder. From there a compressed data file will be generated and sent on to an external location.** To check whether an export succeeded, you can check the Download folder.
- Export directory: Select an Export directory, alternatively you can set an external target directory (FTPS-location).
- Source or target
 - (S)FTP(S) username: Enter the FTP, SFTP or FTPS username for the target location.
 - (S)FTP(S) password: Enter the FTP, SFTP or FTPS password for the target location.

3.4 Magento

Use the *Magento task type* to schedule a data export for a Magento web shop.

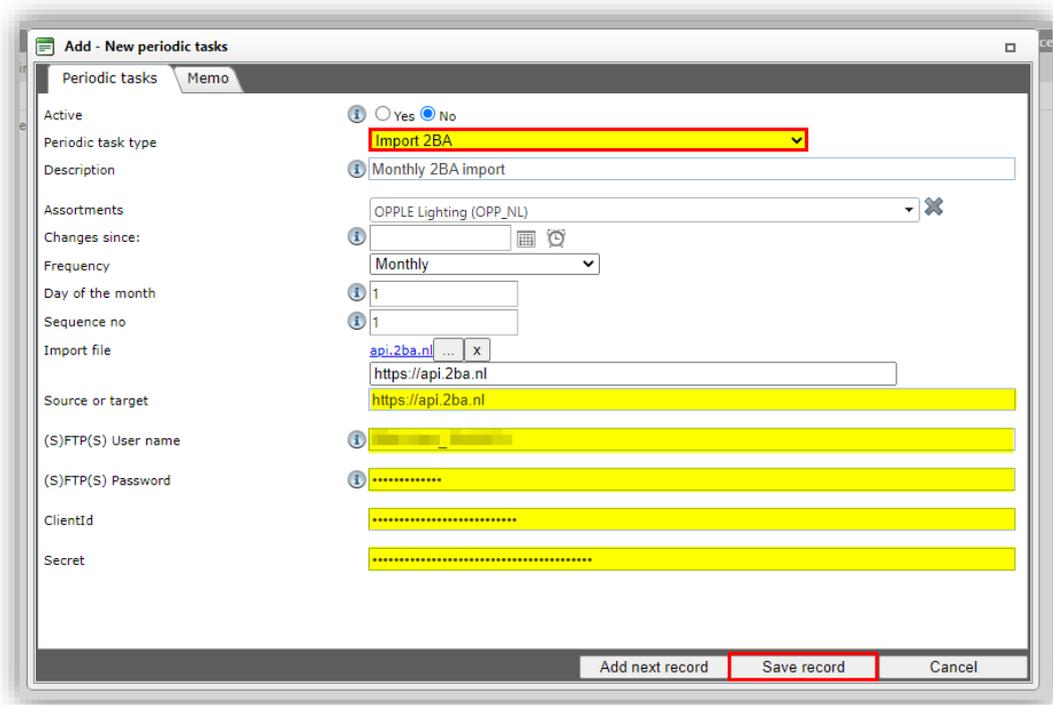


Settings:

- Assortment: Select an Assortment.
- Source or target
 - FTP(S) username: Enter the FTP(S) username for the target location (Magento web server).
 - FTP(S) password: Enter the FTP(S) password for the target location (Magento web server).

3.5 Import 2BA

Manufacturer or supplier data on the 2BA data portal can be automatically imported using the *Import 2BA* periodic task:



Settings:

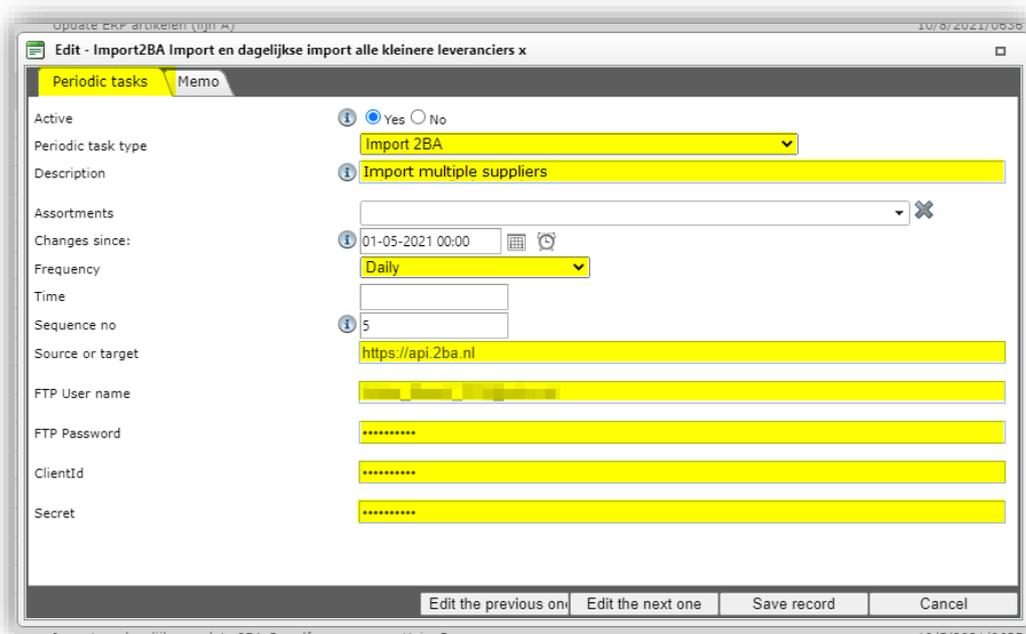
- Source or target: Enter the 2BA API address: <https://api.2ba.nl>
- (S)FTP(S) User name: Enter the username of your 2BA user account
- (S)FTP(S) Password: Enter the password of your 2BA user account
- ClientId: Enter the **ClientID** provided by 2BA
- Secret: Enter the **secret** provided by 2BA

3.5.1 Import 2BA: Multiple suppliers

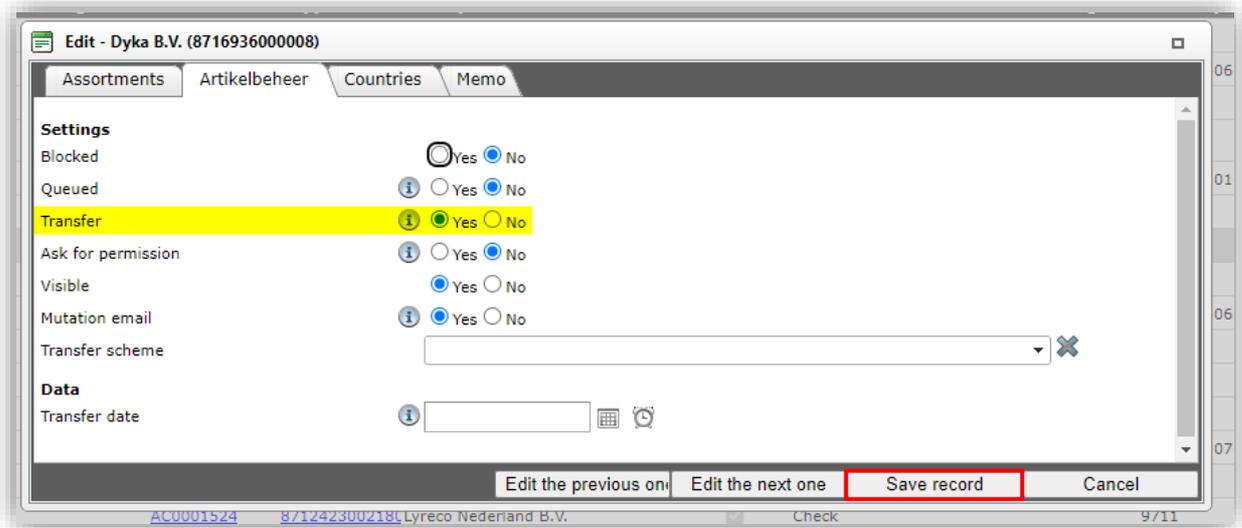
The *Import 2BA* task can be used to import data of multiple suppliers from 2BA.

Note: The method described in this paragraph is recommended for importing data of multiple suppliers which have a small assortment. To prevent *time-out issues*, create individual import tasks for suppliers with a large assortment.

1. Create a new *Import 2BA* task, for example:



2. Next, go to *Items > Assortments*, and for each supplier assortment that is to be imported:
 - a. Select the supplier assortment from the overview list
 - b. Click *Edit*, and go to the tab *Artikelbeheer*
 - c. Set *Transfer* option to *Yes*

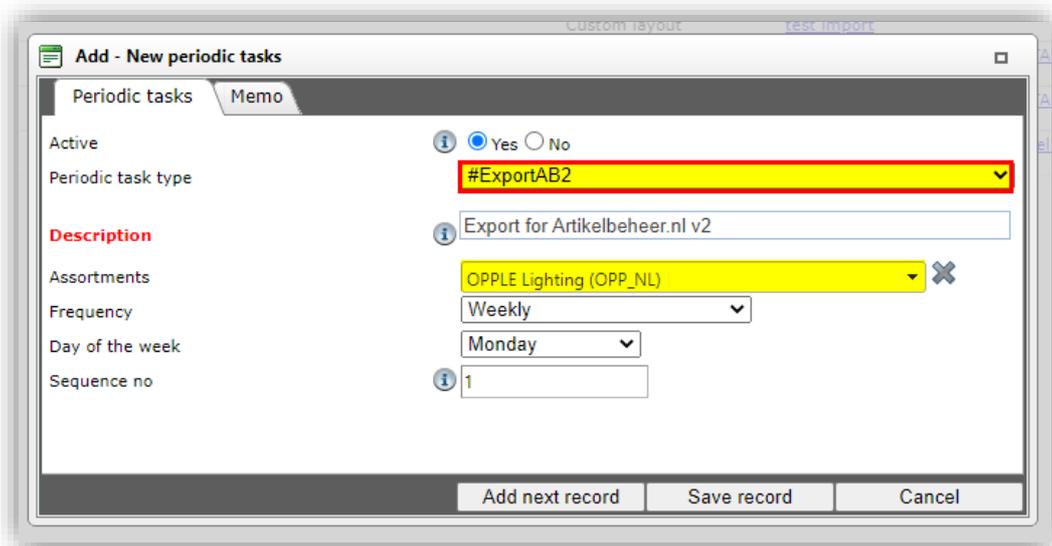


3. Save the record.

3.6 Export Artikelbeheer.nl

Use the *Export Artikelbeheer* task type to schedule the export of data to the *Artikelbeheer.nl* data pool. The settings for this export are taken from the Export Artikelbeheer function on the Assortment overview.

Note: Uploading to Artikelbeheer.nl is also available as a *manual function* on the Assortments overview.



Important: Only Items with the publication option *Datapool*/set to **Yes**, will be exported to Artikelbeheer.nl:

