Compano Online Software

Universal Import/Export
Compano Online Software

Version L6.1

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1 Introduction

Up until version L02, several import and export functions were used in COS. These functions have now been unified into a ***universal import function*** and ***multi-functional export function***.

Also, the ***Excel Update function*** -which made use of Microsoft's Office Add-In and Internet Explorer 11 for exporting, editing and importing data ***was replaced***, as both the browser and the add-in were phased-out by Microsoft.

This manual describes the new universal data import and export method developed for Compano Online Software.

1.1 Concepts

COS
Compano Online Software.

Entity
Data object in COS, for instance Product, Item, Assortment, Attachment, Price, etc.

Record
One instance of a data object in COS, for instance Product 23452-3.

Import
Import of data into data fields in COS. The data source is often an Excel or text-formatted file. Another way of importing data is accomplished by use of a (international) data 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-formatted file. Another way of exporting data is accomplished by use of a (international) data 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, et. cetera. These Data Exchange Standards facilitate the sharing of structured data across different information systems.

Excel Update
Method for updating data in COS, using the Internet Explorer 11 browser and the MS Office Add-In. This method is no longer in use as of COS version L03.

Screen layout
Layout of data columns (fields) on an Overview in COS. Layouts can be customized by the user and often serve as a mapping for data exports as well.

Export layout
Layout for exporting data out of COS. Export layouts can be customized by the user, or are generated on-the-fly.

Delta import

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

Full import
A Full Import compares data in the source file with data in COS. On import any records in COS which are not offered in the import file, will be Archived. All data in COS is overwritten with data from the import file.

Multi-pass import
Consecutive import of multiple entities from one data file. Up to 5 consecutive imports can be handled.

1.2 Automated imports

Besides the universal import and export method, import and exports can also be ***automated***. For instance, a data file for import can be transferred to the Compano server via FTPS to a standard import folder, from where it is automatically processed.

Options for automated import and export are:

- Automated import of industry standard formats: See the *manual COS Basics.*
- Automated import or export non-standard (custom) formats: See the *manual Periodic Tasks*.

Note: For automated imports and exports, an extra FTPS user account needs to be added. Please contact sales@compano.com for information on options and pricing.

2 Export

To tackle all export scenario's, a ***universal export*** method was developed. This new method will handle:

- **Custom exports**: used for *Excel, CSV*, *Unicode* and *fixed width* exports
- **Update exports**: used for updating data in COS

For exporting of Assortments and Items in a ***standard exchange format***, an ***standard item export*** is available:

- **Standard export**: used for exporting item information using standard exchange formats, such as INSBOU, BMEcat, FAB-DIS, etc. or other custom formats (Pricat, Galvano, etc.).

2.1 Industry standard export

The *Item export* function can be used for exporting Items or Assortments[1] in the following ***industry standard data exchange formats***.

Note: For detailed information on Industry standard exports, please see the manual COS Basics.

[1] Depending on the export format, these exports can be set to also include product, attachment, accessory, and other information.

With a ***standard Compano license***:

- **PAB2.0**: ASCII* Product Data & Article (PAB)
- **PAB2.03**: ASCII* Product Data & Article (PAB)
- **SalesBouw**: Older format for Building sector only
- **DICO/INSBOU003**: UTF-8 XML-based compressed format
- **DICO/INSBOU004**: UTF-8 XML-based compressed format, with language selection
- **DICO/SALES005**: UTF-8 XML-based compressed format, with language selection and including certificates

In addition, the following export formats are available with a ***Compano International licence***:

- **BMEcat 4.2**: BMEcat 2005 ETIM Guideline Version 4.0.2
- **BMEcat 5.0**: BMEcat 2005 ETIM Guideline Version 5.0
- **Datanorm 4.0**: Open standard for plumbing, heating, electrical and painting and varnishing industries
- **IGH**: Data exchange format used in Switzerland
- **DQR**: Data export format according to the Datenqualitätsrichtlinie (DQR) for ARGE, BVBS, DG Haustechnik and ZVSHK. Data can be exported according to the following guidelines:
  - DQR 9.0 (OpenData/ITEK)
  - DQR 9.0 (ARGE)
  - DQR 8.0 (OpenData)
- **FAB-DIS 2.3**: Data exchange format based on the BMEcat®-Standard and managed by ETIM International, which is used in France
- **FAB-DIS 3.0**: Data exchange format based on the BMEcat®-Standard and managed by ETIM International, which is used in France
- **ETIMxChange**: Exchange format for ETIM data in JSON format; successor to the BMEcat standard.

Furthermore, items or assortments can be exported in formats compatible with the following software packages:

- **Compano**: GA-Software
- **Compano**: InstallCalc
- **Building Infosys**: Install Office (t/m K40.14.008)
- **Building Infosys**: Install Office (from K40.14.009)
- **Acto**: Easy Project/MyProject
- **InstalLogic**: Handsoft
- **Syntess**: Atrium/Prisma
- **ENK Software**: ENK ERP-software

Should you choose to export data using one of the industry exchange formats, you have the option to either export all items of an assortment, or export (a selection of) items directly.

Note: For a correct export in the x format, some additional steps need to be performed; these are described in the manuals for these export formats.

Warning: Please pay close attention to your settings when switching between export formats! Settings in the export dialog below are ***stored per user***, however common settings are ***retained*** when selecting a different export format. Thus, for instance, when exporting in the FAB-DIS format with the ETIM 8 setting, this setting is retained when switching back to the DQR export format.

2.2 Custom export

For other export scenario's, ***custom export layouts*** are used:

- Custom screen layouts
  - Layouts for exporting an Excel file based on the screen layout
- Custom export layouts
  - Layouts for exporting an Excel file
  - Layouts for exporting a text-based file (CSV, Unicode)

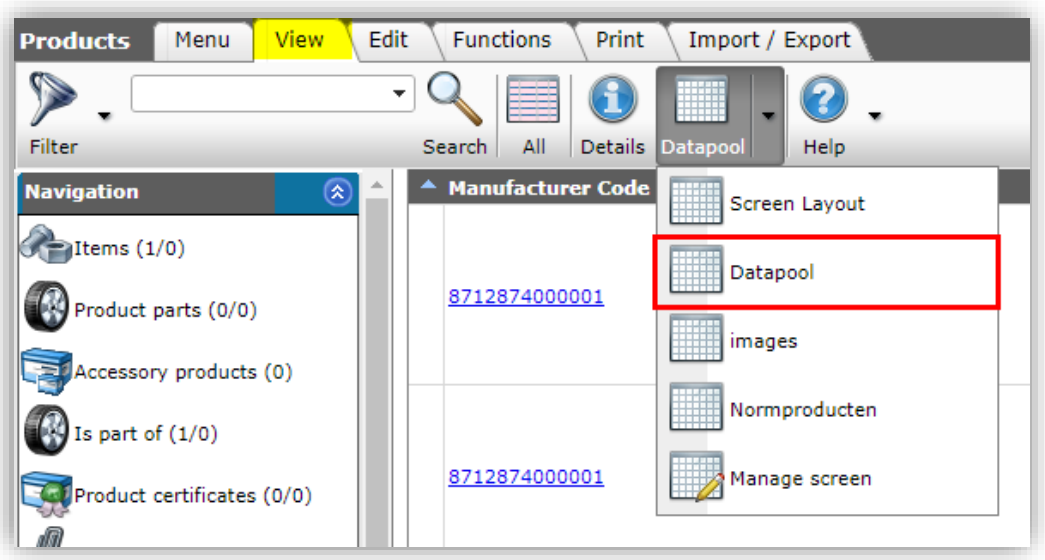
Note: Custom export layouts can be created in advance, or generated on the fly.

2.2.1 Export with custom screen layout

On any Overview the screen layout can be used to export data. All data which is visible in the Overview will be exported as an Excel file.

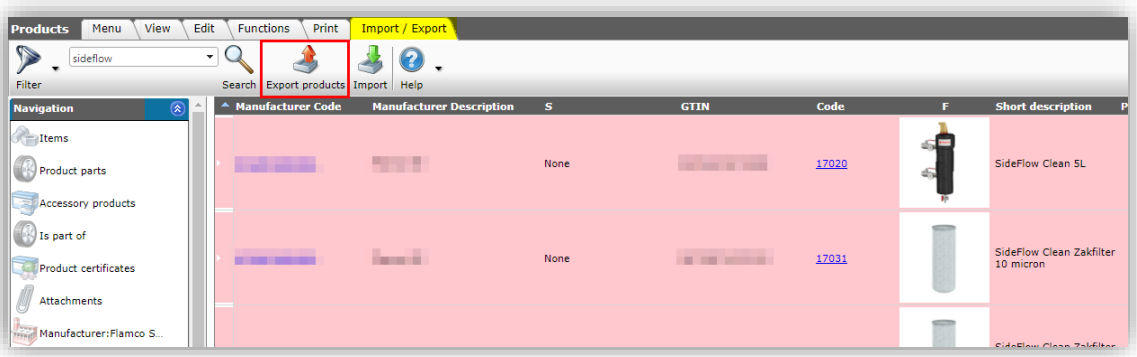
To export data using the screen layout:

1. Through the Menu, navigate to the relevant Overview, for instance *Products*.
2. Go to the *View* tab and select the screen layout which contains the data fields that you need to export, for instance:

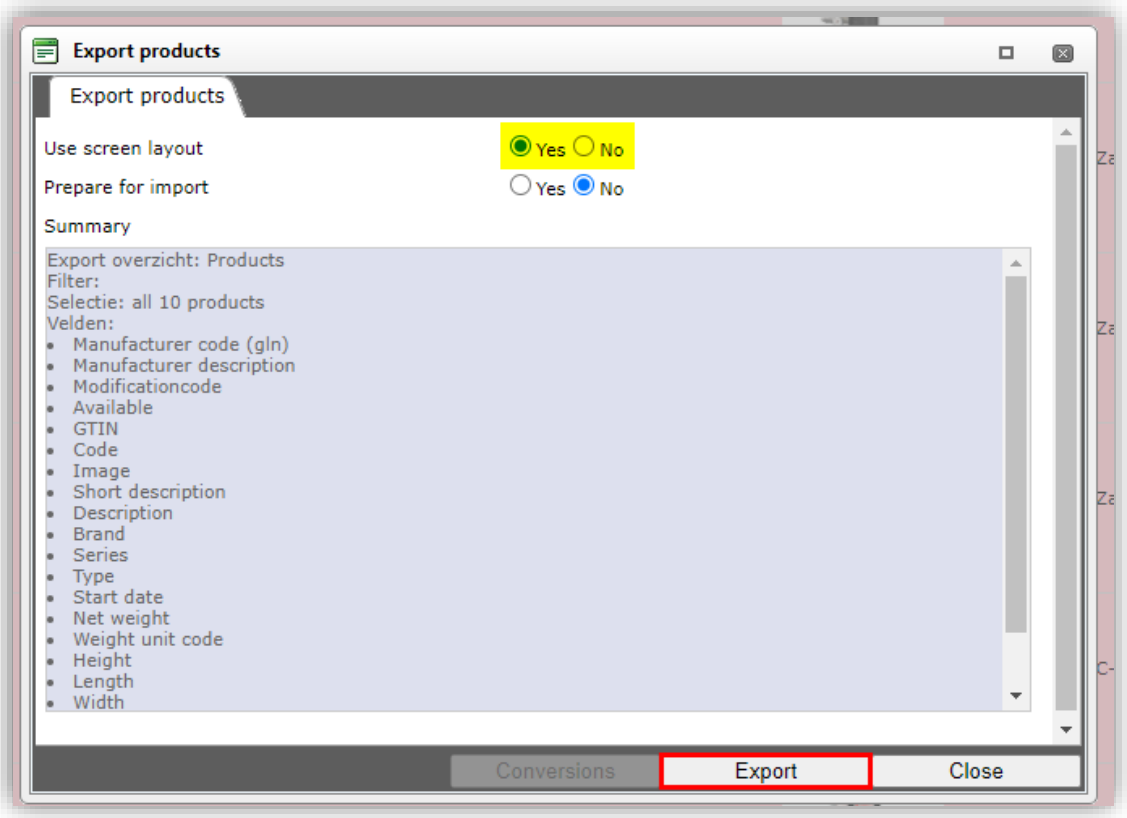


Note: Detailed information on how to create screen layouts can be found in the *Basic Manual Compano Online Software*.

3. Optionally, use Filter and Search to find a set of records.
4. Use select *All* (CRTL-A) or manually select records that you need to export.
5. Next, go to the *Import/Export* tab and click on *Export [ENTITY]*.



6. In the *Export [ENTITY]* dialog:



   a. **Use screen layout**: Set to *Yes*.
   b. **Prepare for import** (optional): Set to *Yes* ,when you need to use the resulting export for later importing of (updated) data.

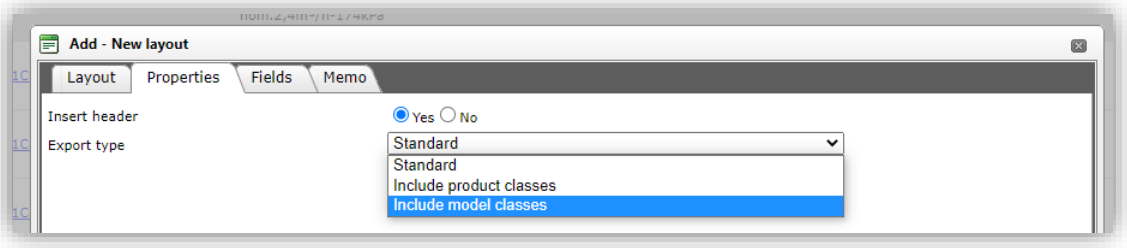
Note: This option replaces the Excel Update function of COS-versions L02 and older. Also see paragraph 2.3 Update export (ExcelForImport).

   c. **Summary:** Lists the records and data fields to be exported.
7. Click on *Export* and save the file at a location of your choice.

2.2.2 Export with custom layout (Excel)

Custom export layouts offer ***more options for data exports*** than screen layouts. Some options are:

- **Conversion of data**: for instance, conversion of units (PCE to STUK).
- **Insert header** (*Yes/No*): Insert a header row containing data labels.
- **Export type**[2] (product exports only): Choose an export layout type:

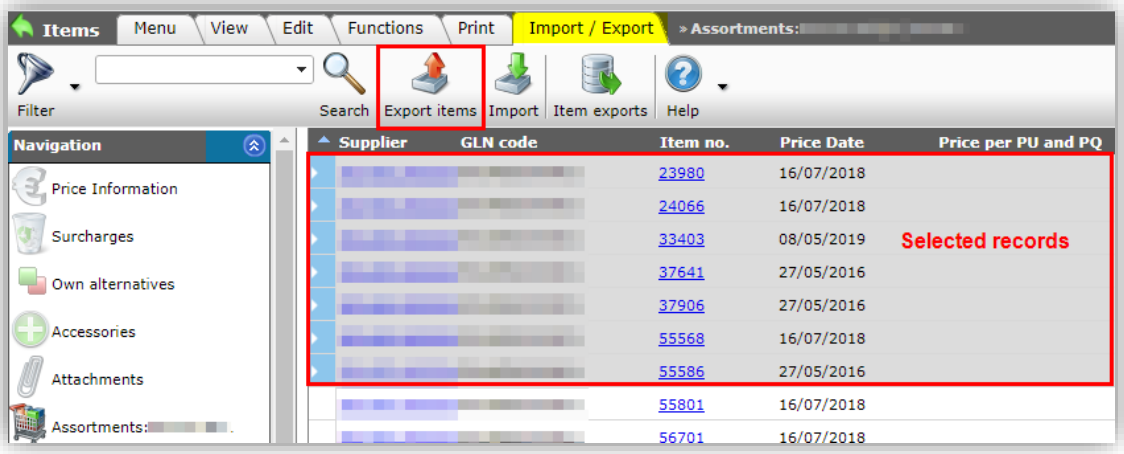


  - **Standard**: Standard export layout, also suitable for updating data.
  - **Include product classes**: Export layout suitable for ***updating (ETIM) product data***; will export the product class(es) and their features.
  - **Include model classes**: Export layout suitable for ***updating (ETIM MC) model data***; will export the model class(es) and their features.

Note: Also see paragraphs **2.3 UPDATE EXPORT (EXCELFORIMPORT)** and **3.3 UPDATE IMPORT (EXCELFORIMPORT)** for a complete description of the update procedure.

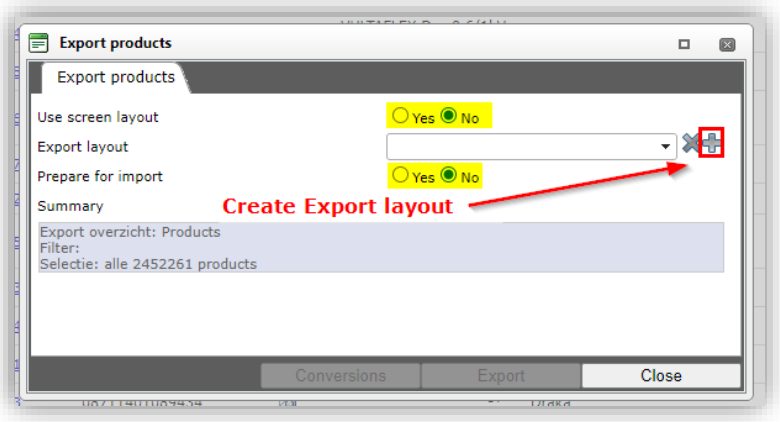
To export data using an Export layout:

1. Through the Menu, go to the Overview where you want to Export data.
2. Use Filter and Search to find a data set.
3. Use select *All* (CRTL-A) or manually select records that you need to export.
4. Next, go to the *Import/Export* tab and click on *Export [ENTITY]*.



5. In the *Export [ENTITY]* dialog:

[2] Note: Other dedicated export types can be added on request, for instance for memos, attachments, et cetera. Please contact sales@compano.com for more information.



a. **Use screen layout**: Set to *No.*

b. **Export layout**: Use the **+**-icon to create a new layout[3]. Alternatively, choose an Export layout from the drop-down menu[4]. Note: Export layouts can also be prepared at *System > Layouts*; see chapter 4. Layout management.

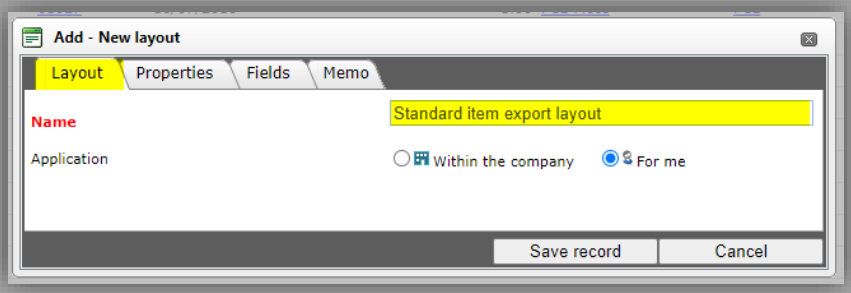
c. **Prepare for import**: Set to *Yes*, when you need to use the resulting export for later importing of (updated) data. Note: This option replaces the Excel Update function of COS-versions L02 and older. Also see paragraph 3.3 Update import (ExcelForImport).

Add New Layout

(skip if you selected a premade layout)

In the *Add – New layout* dialog:

Layout tab



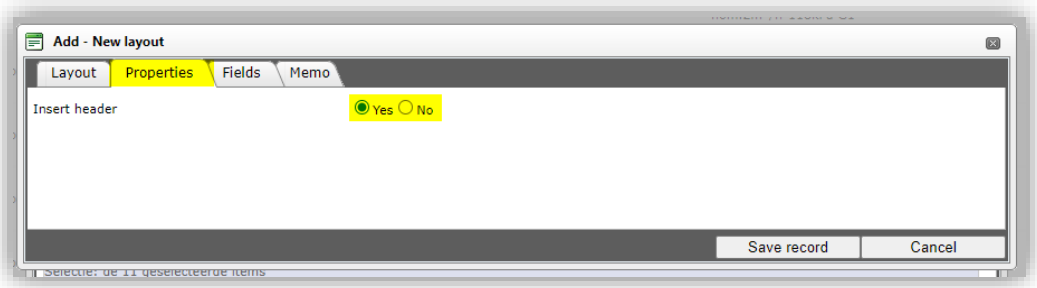
a. **Name**: Enter a *Name* for the Export layout.

b. **Application**: Set to *For me* if the layout is for your own use only, or to *Within the company* if all users within your company need to have access to this layout.

Properties tab

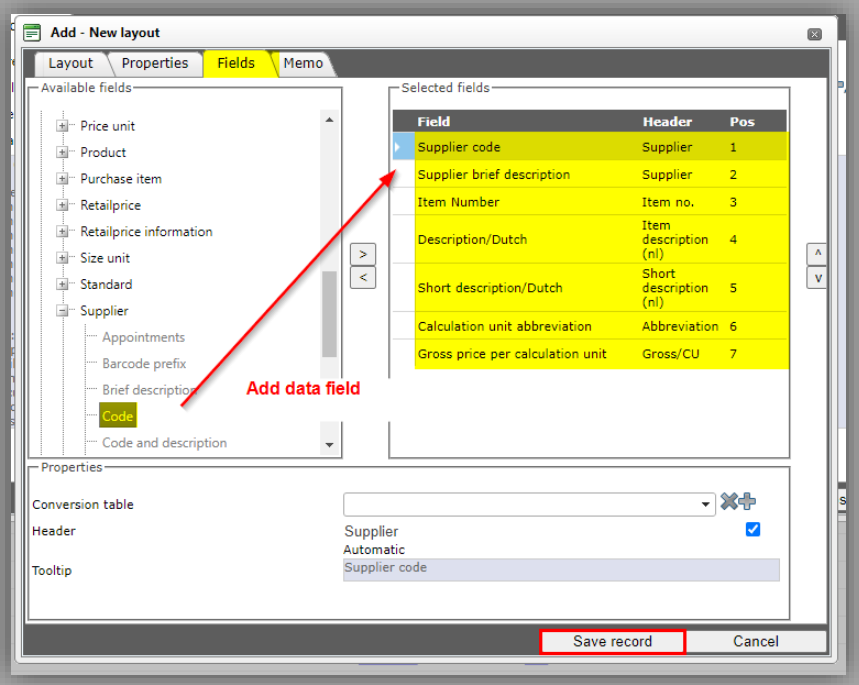
[3] This method only allows for creation of Excel export layouts. If you need to export in a text-based format (CSV, Unicode), the export layout will have to be created through *System > Layouts*, see: 4.1.1 Add custom text-based export layout.

[4] Export layouts created for any Entity, either on-the-fly or at *System > Layouts* will show up in the drop-down menu of the Entity.



a. **Insert header**: Set to *Yes* to include a header row containing data field labels in the export file.

Fields tab

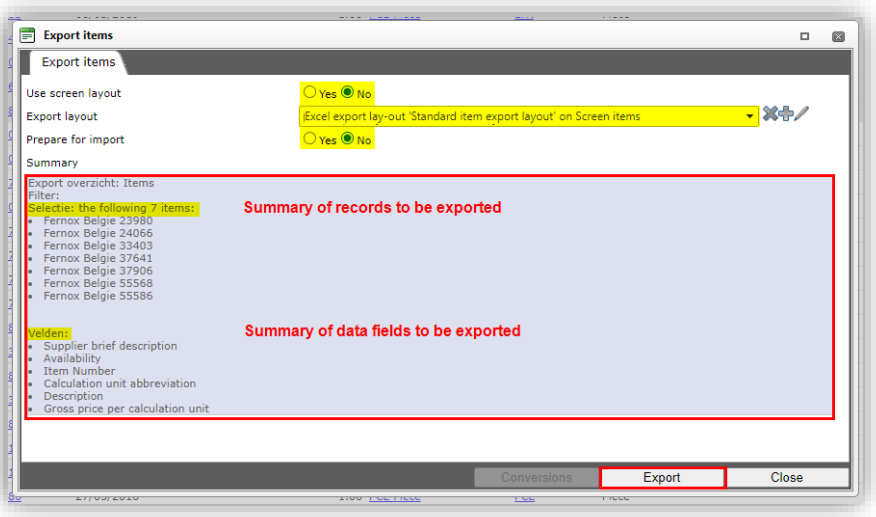


a. **Available fields**: Fields which can be added to your layout.
b. **Selected fields**: Selected fields which will exported.
   > and <: Use these buttons to either add to or remove fields from the *Selected fields*.

Next, click on *Save record* to save your layout[5]. After saving the export layout, you will return to the *Export* dialog.

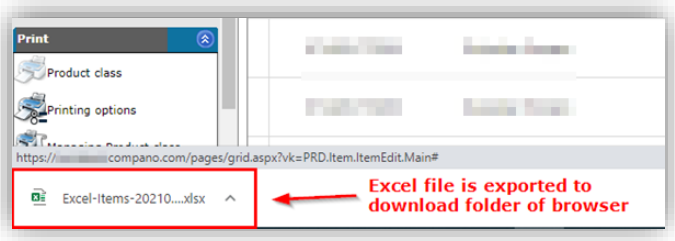
6. Click on the *Export* button to start the export process:

[5] Important: export layouts are created for ***one*** specific Data Entity only, for instance when creating an export layout from the Product overview the layout will be limited to exporting records of the entity Product only.

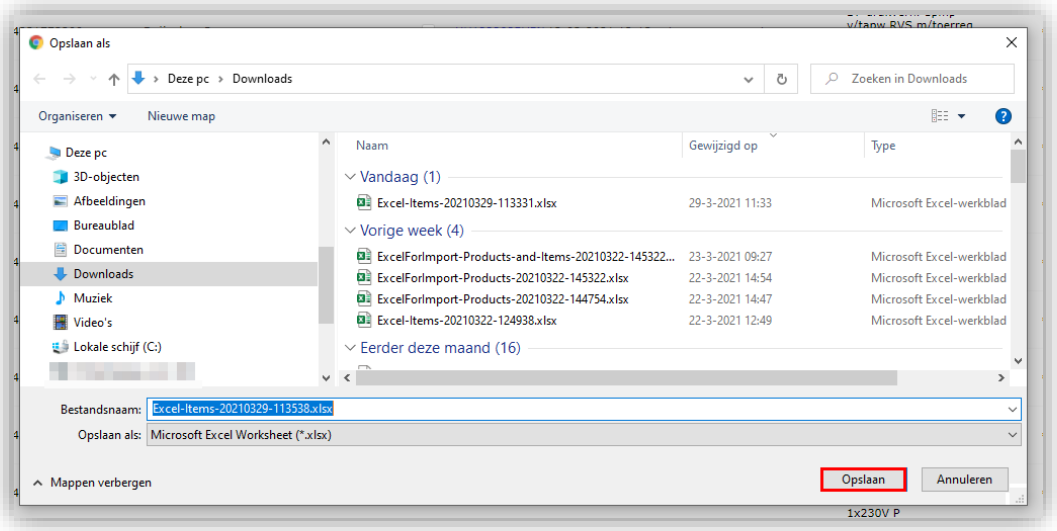


Depending upon your browser download settings:

a. The resulting Excel file will be exported to the Download folder of your browser:

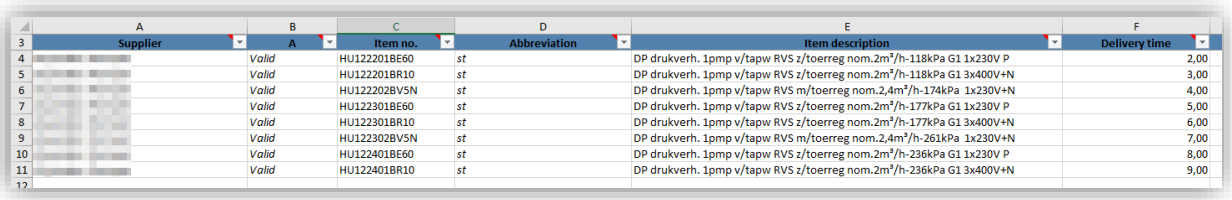


b. Or you can download the Excel file to a folder of your choosing:



The resulting Excel file, named `COS-Excel-[ENTITY]-[DATE]-[TIME]`[6]`.xlsx`, will contain all data fields which were specified in the Export layout:

[6] [DATE] en [TIME] reflect the data and time of the export.



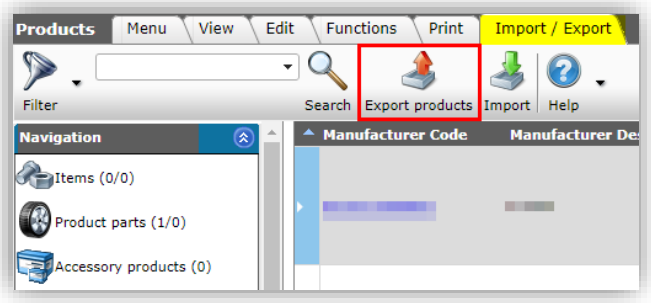
	A	B	C	D	E	F
3	Supplier	A	Item no.	Abbreviation	Item description	Delivery time
4		Valid	HU122201BE60	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-118kPa G1 1x230V P	2,00
5		Valid	HU122201BR10	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-118kPa G1 3x400V+N	3,00
6		Valid	HU122202BV5N	st	DP drukverh. 1pmp v/tapw RVS m/toerreg nom.2,4m³/h-174kPa 1x230V+N	4,00
7		Valid	HU122301BE60	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-177kPa G1 1x230V P	5,00
8		Valid	HU122301BR10	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-177kPa G1 3x400V+N	6,00
9		Valid	HU122302BV5N	st	DP drukverh. 1pmp v/tapw RVS m/toerreg nom.2,4m³/h-261kPa 1x230V+N	7,00
10		Valid	HU122401BE60	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-236kPa G1 1x230V P	8,00
11		Valid	HU122401BR10	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-236kPa G1 3x400V+N	9,00
12						

2.2.3 Export with custom layout (text-based)

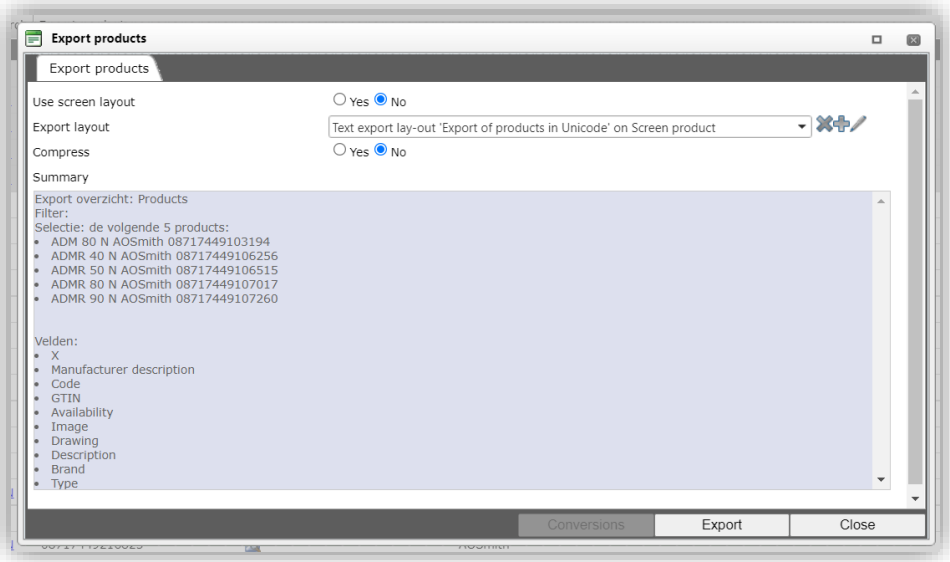
Important: A custom text-based layout ***cannot*** be created on the fly. Prepare your text-based layout at *System > Layouts*, also see paragraph **4.1.1 ADD CUSTOM TEXT-BASED EXPORT LAYOUT**.

To export data with a custom text-based layout:

1. Through the Menu, go to the Overview where you want to Export data.
2. Use Filter and Search to find a data set.
3. Use select *All* (CRTL-A) or manually select records that you need to export.
4. Next, go to the *Import/Export* tab and click on *Export [ENTITY]*.



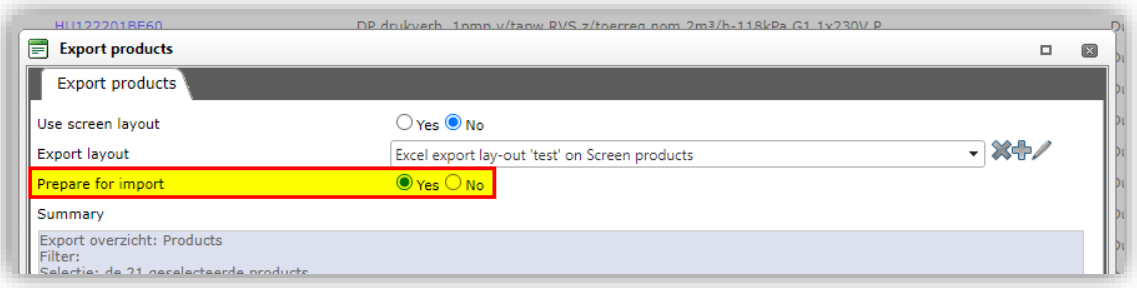
5. In the *Export [ENTITY]* dialog:



a. **Use screen layout**: Set to *No*.
b. **Export layout**: Choose the text-based layout from the drop-down menu.
c. **Compress** (optional): Set to *Yes*, should you need to lower the file size of your export. The file will be export in the `ZIP` compression format.

2.3 Update export (ExcelForImport)

Any Excel export layout can be used to create an ***ExcelForImport-file***, by setting the ***Prepare for import option*** to *Yes:*



The resulting Excel file will be named `COS-ExcelForImport-[ENTITY]-[DATE]-[TIME].xlsx`

> *Important: When renaming an ExcelForImport file, always make sure the filename starts with* ***COS-ExcelForImport****, otherwise the update import will not work properly.*

To update data, edit this ExcelForImport-file with Microsoft Excel. Subsequently, use the ***Import function*** in COS to import the updated data, see paragraph **3.3 UPDATE IMPORT (EXCELFORIMPORT)**.

Important: Worksheets in an ExcelForImport file are ***protected***; should you remove this protection, then Compano cannot guarantee that any changes in the file will be imported correctly.

Note: The ExcelForImport-option replaces the *Excel Update* function of COS-versions L02 and older.

2.3.1 Removing Excel protection

Removing the protection of *ExcelForImport* worksheets is ***not recommended***. However, should you wish to do so, a few rules apply:

- **Hiding columns/rows**: Data in hidden columns and/or rows will be imported.
- **Removing/Adding columns/rows**: ***Not allowed***; you can no longer import the ExcelForImport file.
- **Filtering/Sorting data**: Using filters or sorting in Excel is allowed. Note: When importing an ExcelForImport file with active filters, ***all data*** in the file will be imported, including any data that has been filtered out (!)
- **Editing greyed-out data**: ***Not allowed***; by importing grey-out data you will mess up your data in COS.
- **Using formulas**: Formulas in existing columns are allowed, however you ***cannot refer*** to data in added columns, worksheets or other (Excel) files.
- **Changing cell formats**: ***Not allowed***; you can no longer import the ExcelForImport file.

2.3.2 Non-editable fields

Data fields in Compano that cannot be updated directly are marked-out in ***grey*** in both the COS field selector and any exported Excel files:

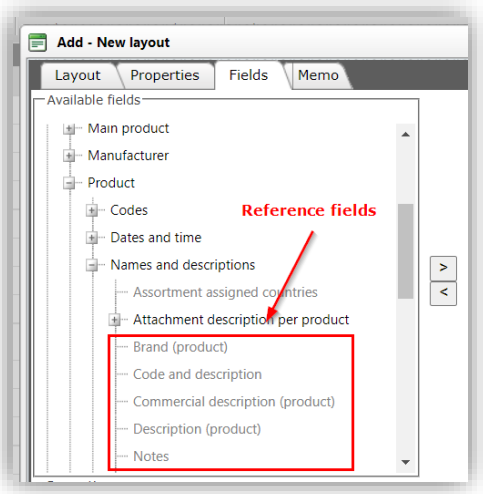


Figure 1. Non-editable fields in the field selector

	A	B	C	D	E
3	Manufacturer Description	Code	GTIN	Short description (product)	Short description (product) (nl)
4		26136		Contraflex expansievat 12/0,5 [3bar]	Contraflex expansievat 12/0,5 [3bar]
5		26171		Contraflex expansievat 18/0,5 [3bar]	Contraflex expansievat 18/0,5 [3bar]
6		26241		Contraflex expansievat 25/0,5 [3bar]	Contraflex expansievat 25/0,5 [3bar]
7		26341		Contraflex expansievat 35/0,5 [3bar]	Contraflex expansievat 35/0,5 [3bar]
8		26493		Contraflex expansievat 50/1,5 [6bar]	Contraflex expansievat 50/1,5 [6bar]
9		26793		Contraflex expansievat 80/1,5 [6bar]	Contraflex expansievat 80/1,5 [6bar]
10		17020		Reference field	Source
11		17031		SideFlow Clean Zakfilter 10 micron	SideFlow Clean Zakfilter 10 micron
12		17032		SideFlow Clean Zakfilter 25 micron	SideFlow Clean Zakfilter 25 micron
13		17033		SideFlow Clean Zakfilter 50 micron	SideFlow Clean Zakfilter 50 micron
14		17035		SideFlow Clean C-sleutel	SideFlow Clean C-sleutel
15		17021		SideFlow Clean 3.5L	SideFlow Clean 3.5L

Figure 2. Non-editable fields in the exported Excel file

Non-editable fields include:

- **Reference(data) fields**: These fields cannot be updated directly, because their value comes from another data field in Compano. For instance, *Translatable fields* where the value of the field refers to one or more corresponding language-specific fields: `Short Description` can refer to `Short Description (nl)`, but also to `Short Description (en)`
- **Calculated fields**: The value of the field is calculated from one or more other data fields in the application. For example: the `Net price` is calculated from `Gross price` minus `Discount`.
- **Read-only fields:** Some fields in COS are read-only and never be updated. Examples are: `Import date`, `Author`, etc.

2.3.2.1 *Updating calculated fields*

For calculated fields, the value of the field is calculated from one or more other data fields in the application. Therefore, to update the value of a calculated field, these 'source' fields need to present in your Excel export layout.

Example

The value of `Net price` is calculated from `Gross price` minus `Discount`. To edit the Net price, either the Gross price or the Discount, or both need to be present in your layout:

2.3.2.2 *Updating translatable fields (multi-language license only)*

In COS-applications with a multi-language license, translatable fields refer to their language-specific counterpart(s), based on the language that is set for your user-interface, for example:

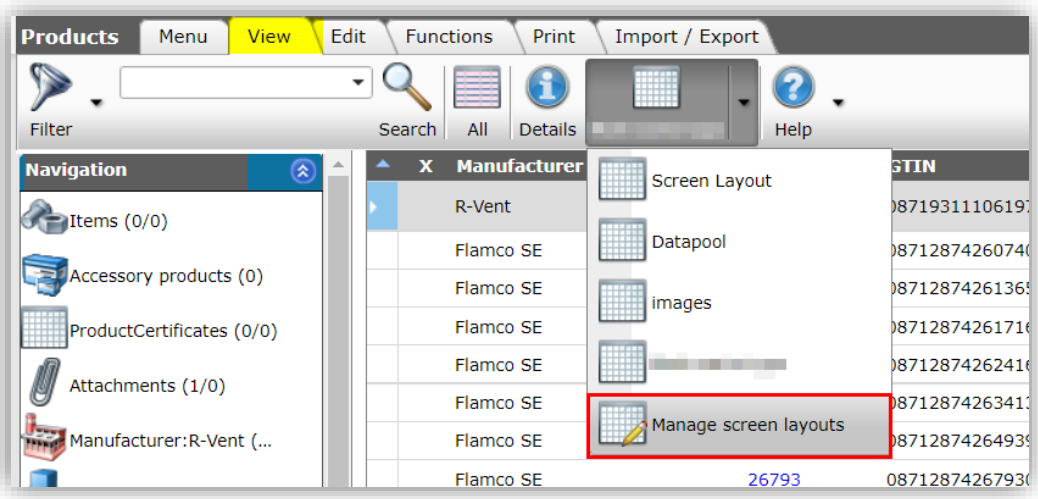
	User-interface language	
Translatable field	**English (en)**	**German (de)**
Series → refers to:	*Series (en)*	*Series (de)*
Type →refers to:	*Type (en)*	*Type (de)*

Thus, to update the value of a translatable field, you should really update the corresponding language-specific field.

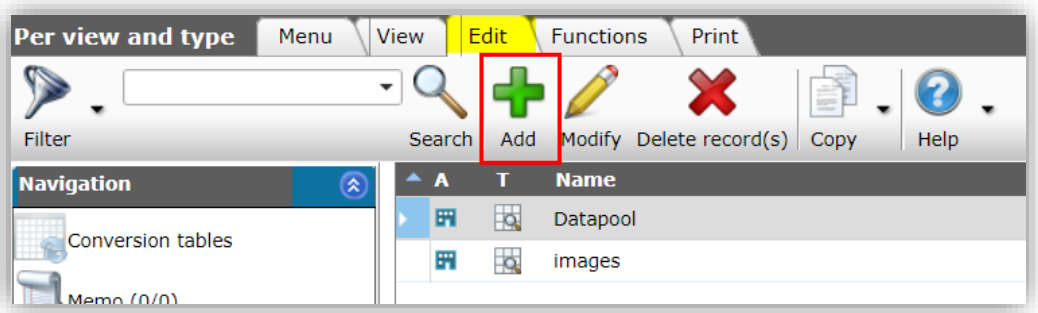
Example

Suppose you need to translate the fields *Series* and *Type* on the entity Product and the language of your user interface is *English (en).* In this case the fields *Series* and *Type* refer to *Series (en)* and *Type (en)*. Only the latter two fields can be edited using the Universal Import/Export method:

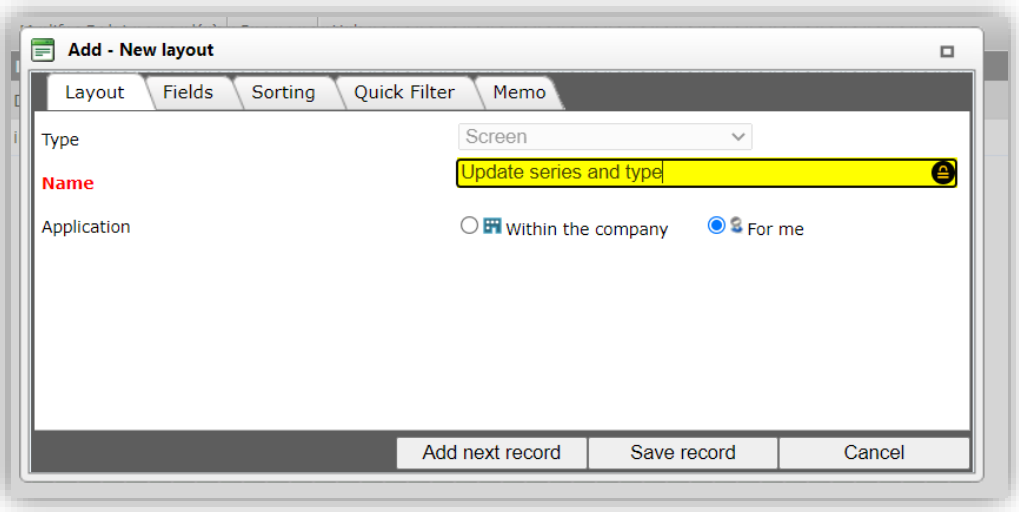
1. Through the Menu, go to *Products > Products*.
2. On the Products overview, go to the *View* tab and click on *Manage screen layouts*:



3. Under Edit, click on *+Add* to create a new screen layout:

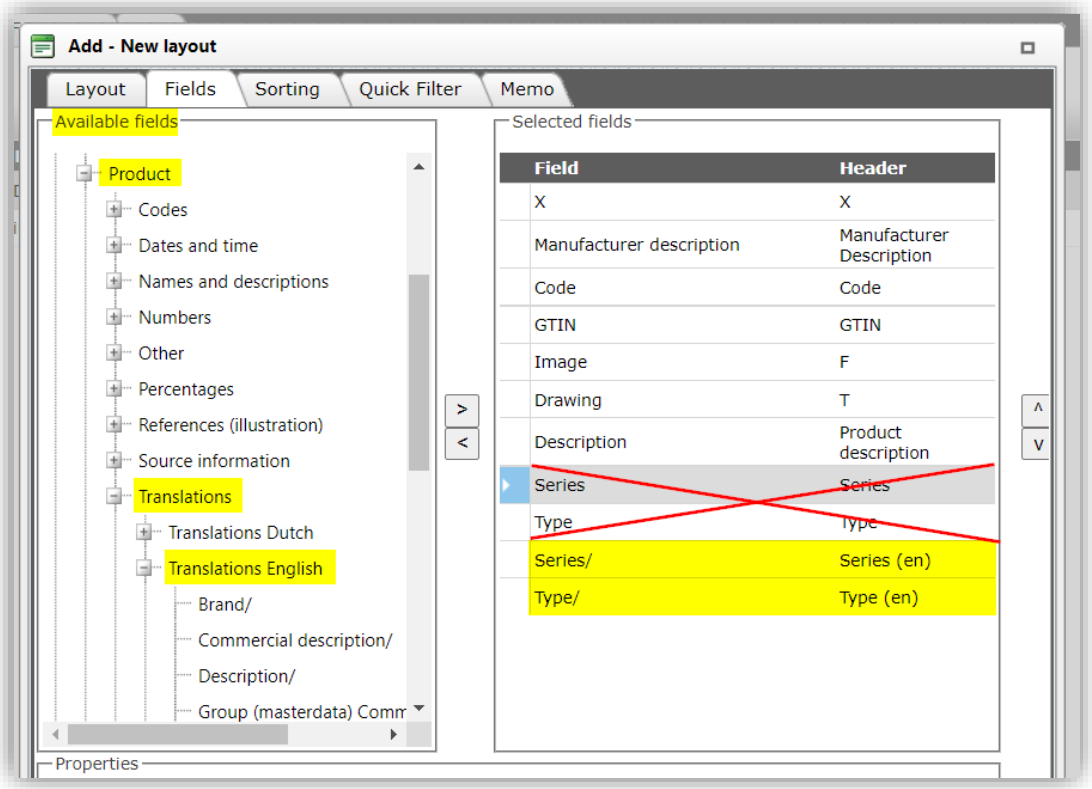


4. On the *Layout* tab, name your layout:



5. Next, on the Fields tab, add the Translation fields.

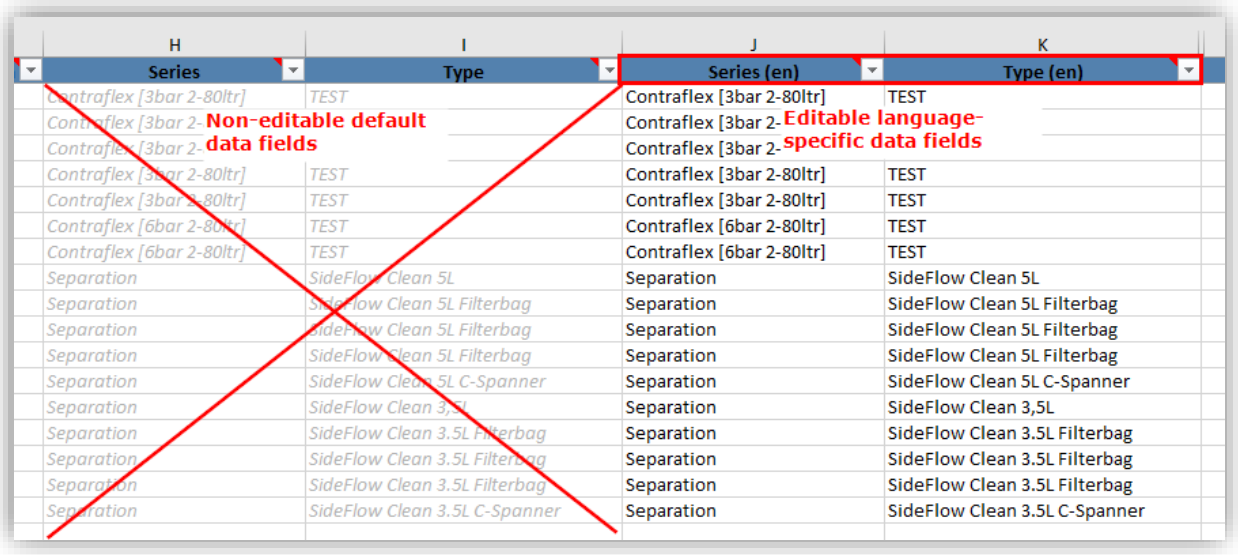
   Note: Translation fields can be found under *Available fields > By category > Product > Translations > Translations English*.



   Reminder: The default fields *Series* and *Type* (crossed-out) cannot be updated as they take their content from the language-specific fields of your user interface, in this example their English *(en)* counterparts.

6. Apply the screen layout.

After exporting the product data, the resultant ExcelForImport-file will clearly show the difference between the non-editable default data fields (greyed-out) and the editable language-specific data fields (black):

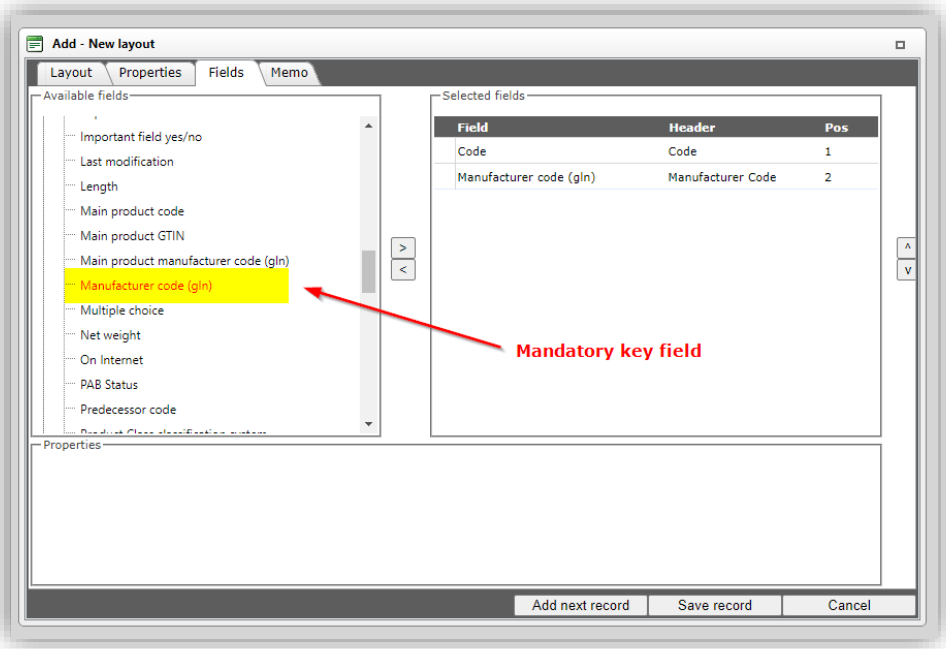


H	I	J	K
Series	Type	Series (en)	Type (en)
Contraflex [3bar 2-80ltr]	TEST	Contraflex [3bar 2-80ltr]	TEST
Contraflex [3bar 2-		Contraflex [3bar 2-	
Contraflex [3bar 2-		Contraflex [3bar 2-	
Contraflex [3bar 2-80ltr]	TEST	Contraflex [3bar 2-80ltr]	TEST
Contraflex [3bar 2-80ltr]	TEST	Contraflex [3bar 2-80ltr]	TEST
Contraflex [6bar 2-80ltr]	TEST	Contraflex [6bar 2-80ltr]	TEST
Contraflex [6bar 2-80ltr]	TEST	Contraflex [6bar 2-80ltr]	TEST
Separation	SideFlow Clean 5L	Separation	SideFlow Clean 5L
Separation	SideFlow Clean 5L Filterbag	Separation	SideFlow Clean 5L Filterbag
Separation	SideFlow Clean 5L Filterbag	Separation	SideFlow Clean 5L Filterbag
Separation	SideFlow Clean 5L Filterbag	Separation	SideFlow Clean 5L Filterbag
Separation	SideFlow Clean 5L C-Spanner	Separation	SideFlow Clean 5L C-Spanner
Separation	SideFlow Clean 3,5L	Separation	SideFlow Clean 3,5L
Separation	SideFlow Clean 3.5L Filterbag	Separation	SideFlow Clean 3.5L Filterbag
Separation	SideFlow Clean 3.5L Filterbag	Separation	SideFlow Clean 3.5L Filterbag
Separation	SideFlow Clean 3.5L Filterbag	Separation	SideFlow Clean 3.5L Filterbag
Separation	SideFlow Clean 3.5L C-Spanner	Separation	SideFlow Clean 3.5L C-Spanner

2.3.3 Mandatory key fields

Specific ***key data fields*** are required to import each entity. These fields are included when using *the Prepare for Import* option, however on custom imports these fields will need to be present in your import layout ***and*** import data file.

Mandatory fields are marked in red in the *New layout* dialog:

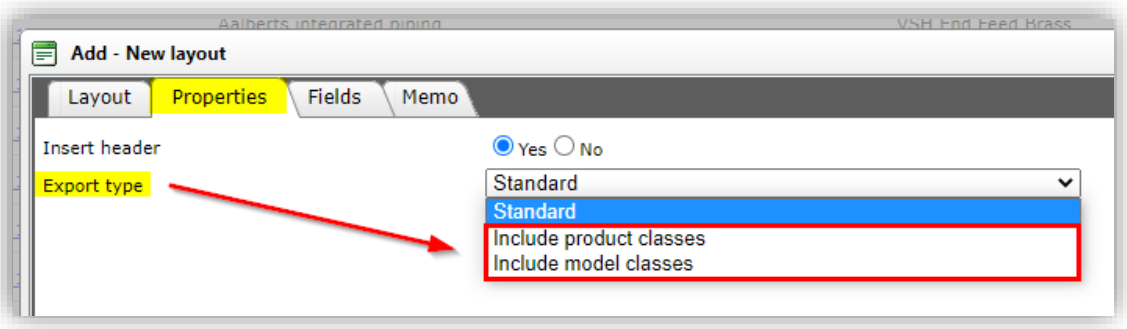


Important: When migrating to COS version L03, existing import (and export) layouts should be checked for missing mandatory fields. For an overview of the mandatory key fields per data entity, see chapter ***5 APPENDIX A:*** *.*

2.3.4 Export classification fields

Updating of ***product classification data*** (ETIM or BIM) can be accomplished using two dedicated Export types:

- **Include product classes**: used for updating *ETIM product classification* data
- **Include model classes**: used for updating *BIM-model classification* data



For a further explanation, see paragraph **3.3.1 UPDATING CLASSIFICATION DATA**

2.3.5 Exporting fields containing HTML

Certain data fields in COS can contain HTML formatting code, for instance the *Commercial Description* field. When exporting these data fields, please note:

- **Custom export**: The HTML-code is stripped on export; the export file will contain ***no*** HTML-codes.
- **Export for import**: The HTML-code is exported; the ExportForImport-file will contain HTML-codes, which can be updated and imported back into COS.

3 Import

To tackle ***all import scenario's***, a universal import method has been developed. This new method will handle:

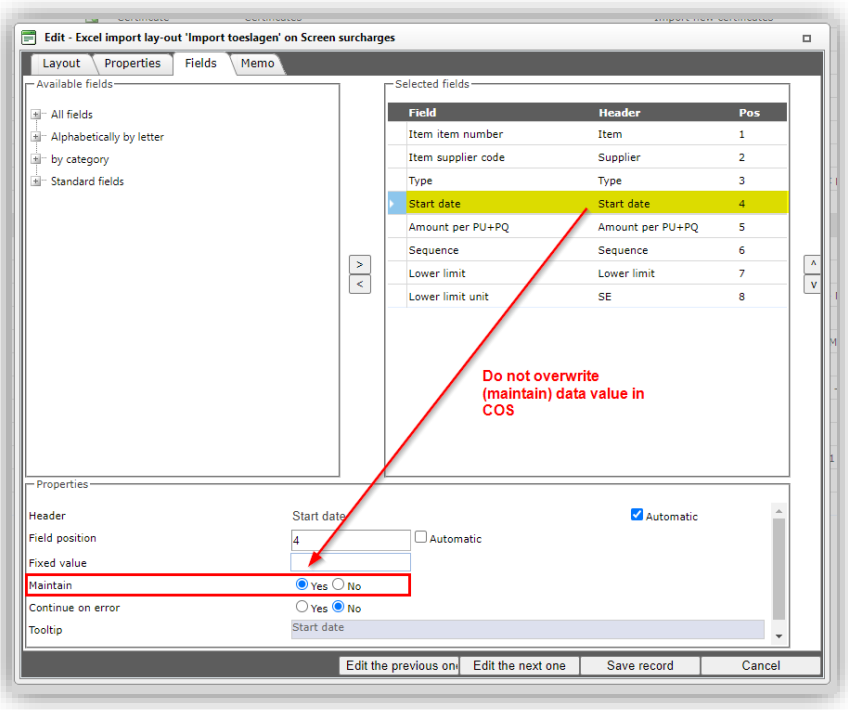
- **Standard imports**: used for importing data by means of industry standards, such as DICO (INSBOU/SALES), BMEcat, FAB-DIS, etc. and custom formats, such as Pricat, Galvano, et cetera.
- **Custom imports**: used for importing character-separated and fixed-width data files, such as Excel, CSV, and TXT (Unicode). Note: can also be used to import Excel files with multiple worksheets or compressed files (ZIP, BZIP) containing multiple data files.
- **Update imports**: used for updating data. This option replaces the *Excel Update* function.

Some general notes on importing data:

- A data import can be started on ***any*** *Overview* using the *Import* button. The application will autodetect which kind of data you wish the import. If this is unclear, the import dialog will ask for the import Entities and any import layouts for your data.

Tip: For ease of use, when importing data of a single Entity, Compano recommends using the Import button on the corresponding Overview of the Entity; for instance product data at Products, surcharges at Surcharges, et cetera.

- Column headers in the import file need ***not*** reflect corresponding header labels in COS; therefore you are allowed to change the labels of any column headers in your import files or ExportForImport files. Note: The **Pos**(ition) number of the data field ***must*** correspond with the correct Excel data column!
- To prevent overwriting data, a custom import layout can be defined where overwriting data can be disabled per data field:



3.1 Industry standard import

An industry standard import can be used with the following data exchange formats:

- IXF (classification XML)
- ICC (conditions XML)
- PAB105
- PAB20
- PAB203
- PRICAT (PrIce / Sales catalog)
- SALESBOUWV3
- INSBOU003
- INSBOU004
- DICO/SALES005
- DICO/SALES0051
- EZBASE

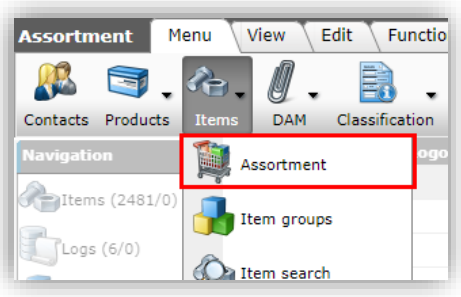
- BMEcat31
- BMEcat42
- BMEcat50
- DataNorm
- DataNormV12Xml
- DQR8 (OpenData, ARGE)
- DQR9 (OpenData, ARGE)[7]

Note: The Import function will ***autodetect*** which industry standard exchange format is offered.

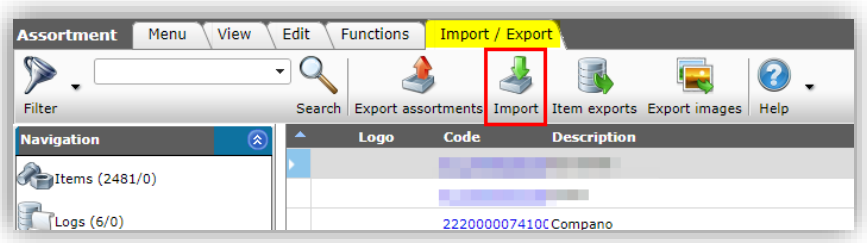
Warning: For industry standard imports, such as SALES005, DQR, BMEcat5, if the import is recognized (especially for the items) as a ***full*** *import and there are* ***no errors****, then any* ***previously imported*** *and* ***untouched*** *articles will be archived. Thus, if items were added manually, they will not have an import date and therefore they will* ***not*** *be archived.*

To import data using a industry standard exchange format (DICO/SALES005 example):

1. To start the import of data, through the Menu, go to *Items > Assortments*:

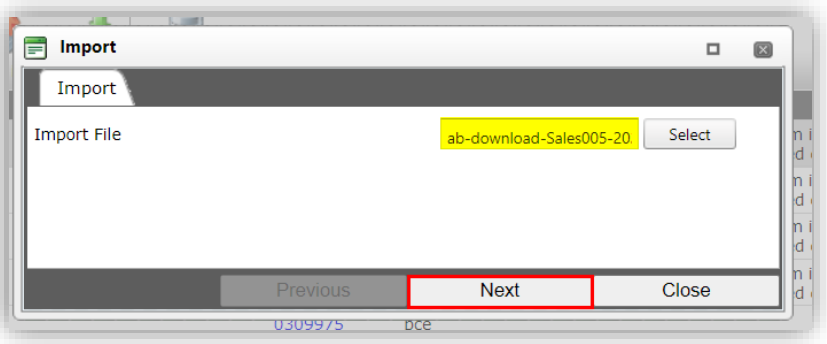


2. Next, go to the *Import/Export* tab and click on *Import:*



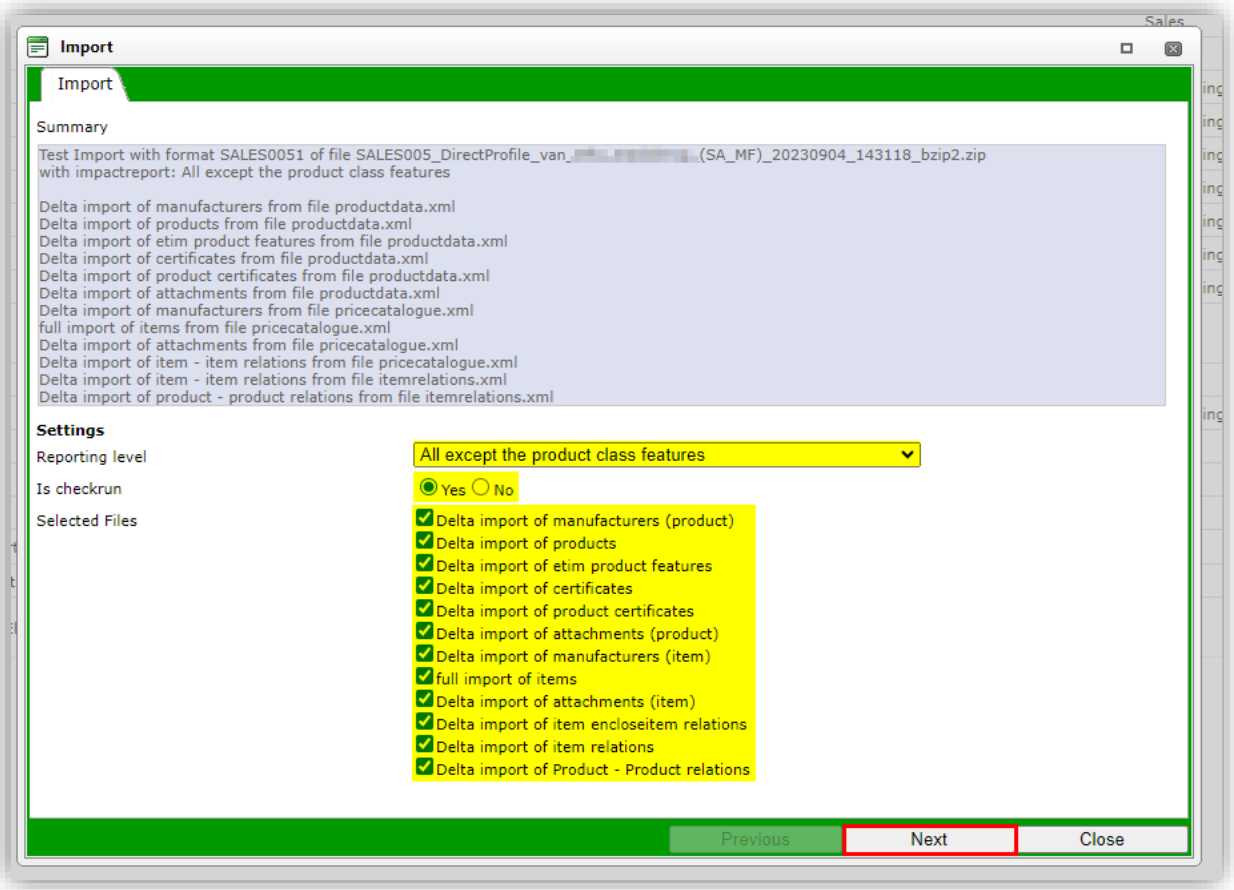
3. In the Import dialog, first select your data file and click on *Next:*

[7] DQR 9.0 is under development as of 24-4-2023



Important: The data file will be analysed upon import; depending upon the size of the data file, this can take some time. Please be patient.

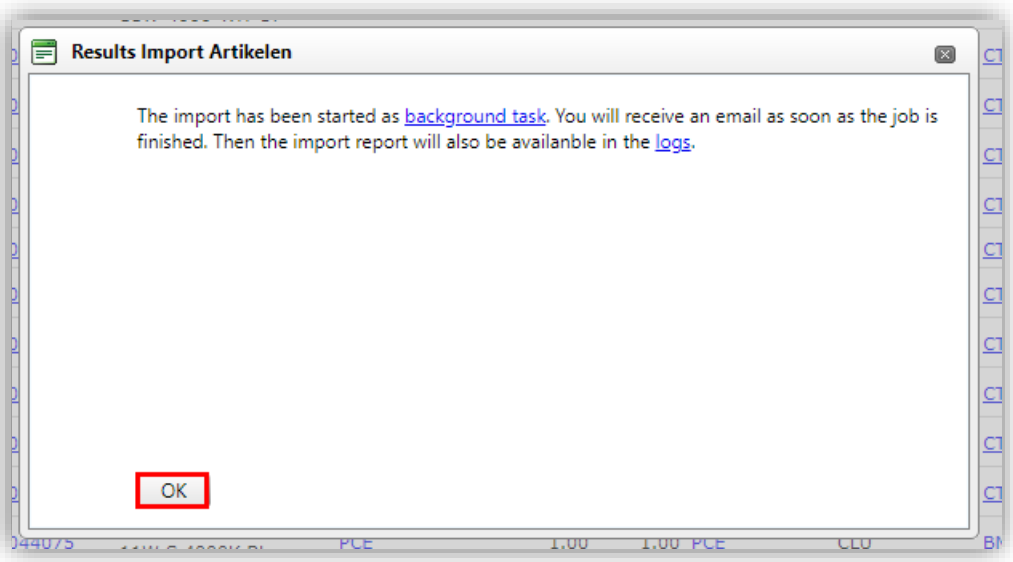
4. In the Import dialog :



a. **Reporting level**: Select the reporting level for the import report:
   i. **None**: Do ***not*** generate an import report. This will result in the fastest import.
   ii. **All except the product class features**: Generate an import report, but exclude any checks on (ETIM) Product Features. This is the ***default setting*** for all imports and will result in a faster import.
   iii. **Full**: Generate a full import report, including all changes in all fields. This will result in the slowest import as all data fields will be checked.
   iv. **Only warnings**: Generate an import report only listing warnings. This import is generally faster than with a Full report.

b. **Is testrun**: Set to *Yes* to simulate an import; this will only generate an import report listing any potential errors and/or warnings. No data is actually imported!
c. **Selected files**[8]: Several entities can be selected for ***delta*** or ***full*** import, for instance: a delta import of products, a full import of items, a delta import of product attachments, etc. Use the checkboxes to (de-)select which data is to be imported, in this example:
    i. **Delta import of products**: Check this box if you need to import only changes in the product data (new or changed products). When set to *No,* the data will ***not*** be imported.
    ii. **Delta import of etim product features**: Check this box if you need to import only changes in the ETIM product data (new or changed ETIM classes and/or features). When set to *No,* the changed ETIM data will ***not*** be imported.
    iii. **Delta import of attachments (products)**: Check this box if you need to import only changes in the attachment data (new or changed attachments). When set to *No,* the data will not be imported.
    iv. **Full import of items**: Check box if you need to import ***all*** (new) item information. When set to *No,* the data will not be imported.
    v. **Delta import of attachments (items):** Check box if you need to import only changes in the attachment data (new or changed attachments). When set to *No,* the data will not be imported.

5. Click on *Next* to start the import; you will receive the following pop-up message:



You will receive an ***import report*** via e-mail[9], or you can find the import report under *System > Logs*. See also paragraph **3.5 IMPACT ANALYSIS.**

3.1.1 Automatic import

For Industry standard data files, an import can be set up:

- Compano customer sets up an automated upload of an industry standard data file to a Compano FTPS-server location.
- COS software automatically imports the data file as a nightly job.

[8] Which *Selected files* will show, depends on the type of import file offered.
[9] For automated import tasks (periodic tasks), the import report is sent to the *admin* user.

For more information, see chapter 7 APPENDIX C: AUTOIMPORT/AUTOCHECK and contact Compano consultant.

3.1.2 DQR import

For DQR imports, the following applies:

- **Supported DQR import formats**: DQR 8.0 and DQR 9.0
- **ETIM version**: Should a DQR file contain multiple ETIM versions, on import only the most recent ETIM version will be imported.

3.1.3 FAB-DIS import

FAB-DIS is an Excel format and can thus be imported using a custom Excel import, with the exception of ETIM-classification data which cannot be imported this way.

3.2 Custom import

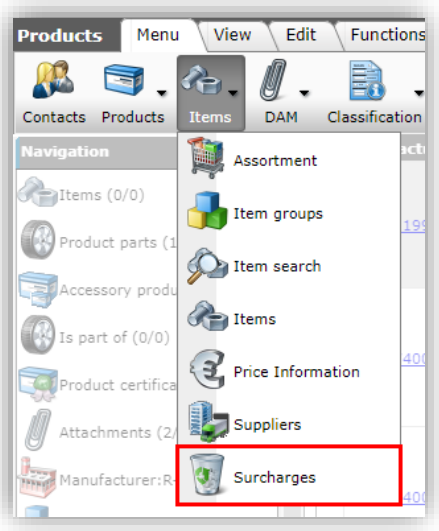
Custom import files, such as Excel, CSV or (Unicode-) Text files, need to be imported using ***custom import layouts***.

Custom import layouts can be created:

- **On-the-fly**: In the Import dialog, see the numbered list below.
- **At System > Layouts**: See paragraph 4.2 ADD IMPORT LAYOUT.

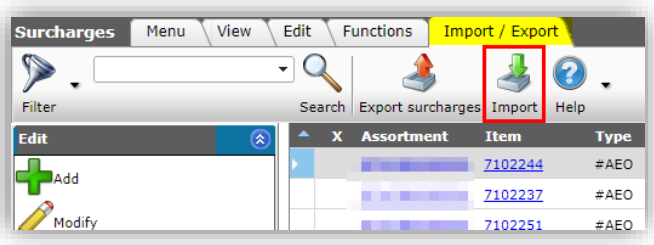
To import a custom data file:

1. Through the menu, go to the Entity[10] that you need to import, for instance *Items > Surcharges*:

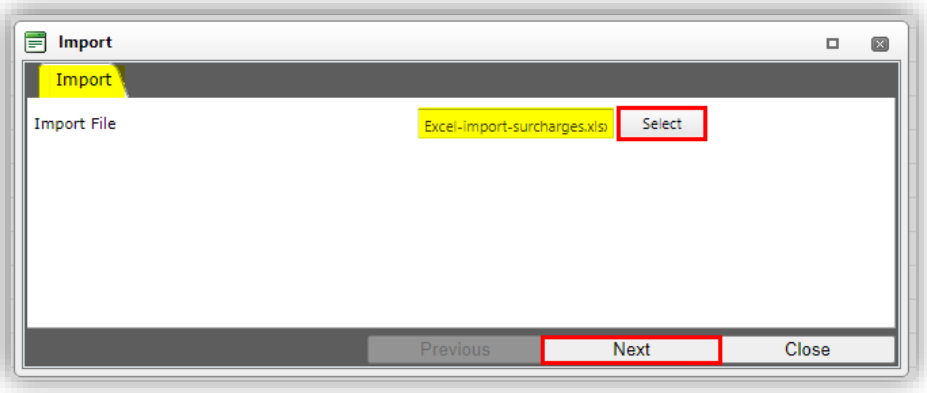


2. Next, go to the tab Import/Export and click on *Import*.

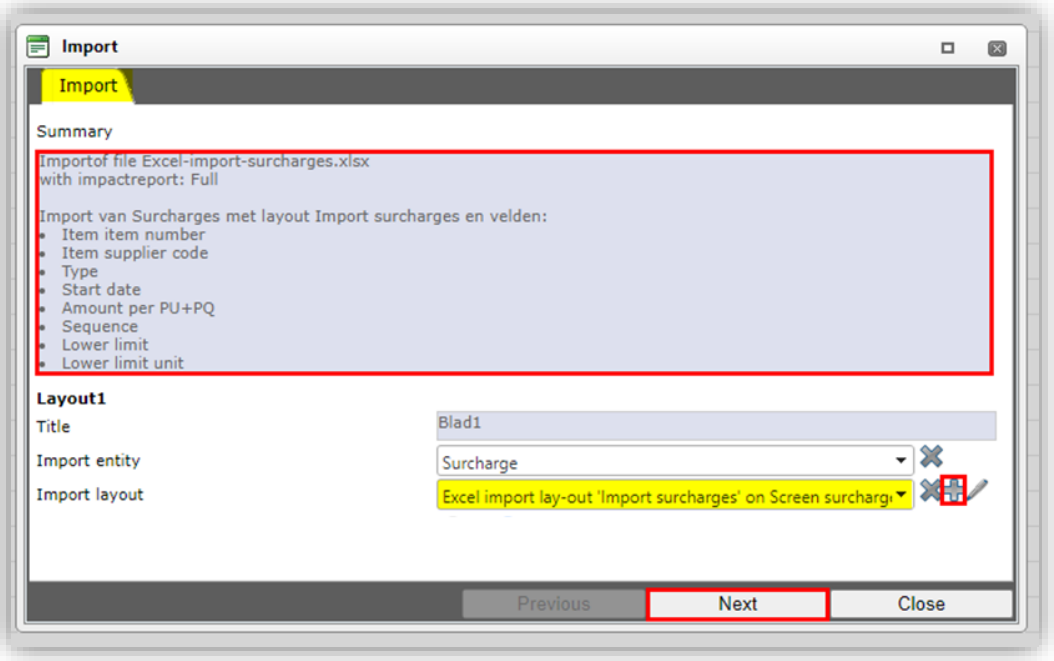
[10] Or, use any Import button in COS.



3. In the Import dialog, first select your import file and click on *Next*:



4. In the next screen:



Layout1[11]

a. **Summary**: The Summary lists all fields which are to be imported, based on the selected Import layout.
b. **Title**: Name of the import source; for instance, the name of the Excel worksheet.
c. **Import entity**: Autodetected import entity; if this is not correct, select a different entity from the drop-down menu.

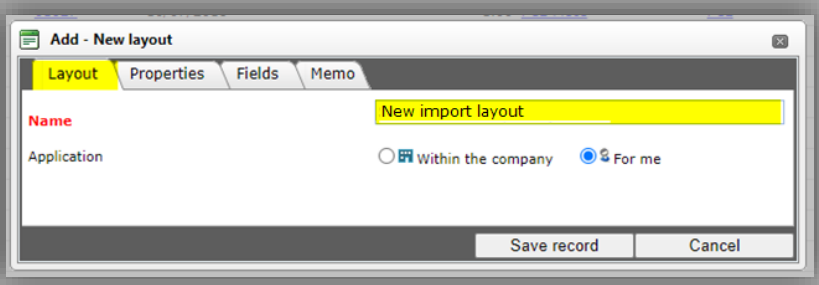
[11] In case of multiple data sources, for instance an Excel file with multiple worksheets, the dialog will list a layout for each data source (*Layout1, Layout2, Layout3*, etc.).

d. **Import layout**: Either select a premade Import layout from the drop-down menu, or click on the **+**-icon to create an Import layout on-the-fly.

Add New Layout
(skip if you selected a pre-made layout)

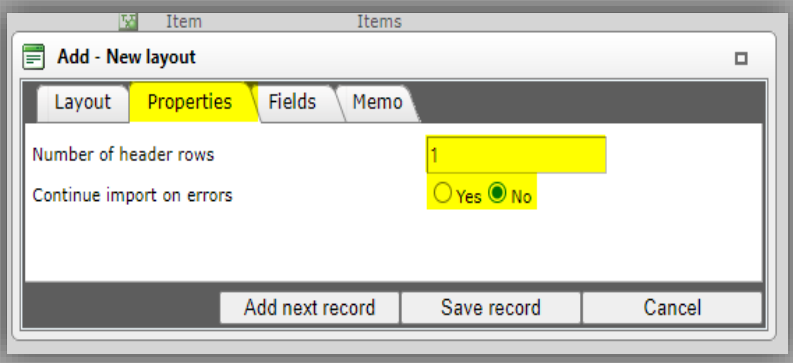
In the *Add – New layout* dialog:

Layout tab



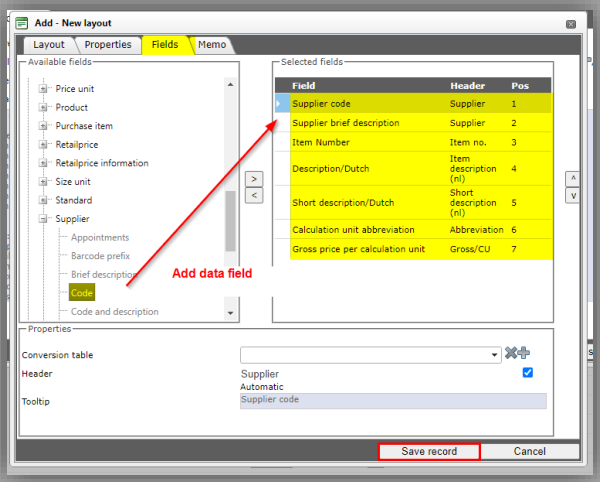
a. **Name**: Enter a *Name* for the Import layout.
b. **Application**: Set to *For me* if the layout is for your own use only, or to *Within the company* if all users within your company need to have access to this layout.

Properties tab



a. **Number of header rows**: Enter the number of header rows in your Excel file that should be skipped on import.
b. **Continue import on errors**: Set to *Yes*, if the import should continue when encountering a faulty record.

Fields tab

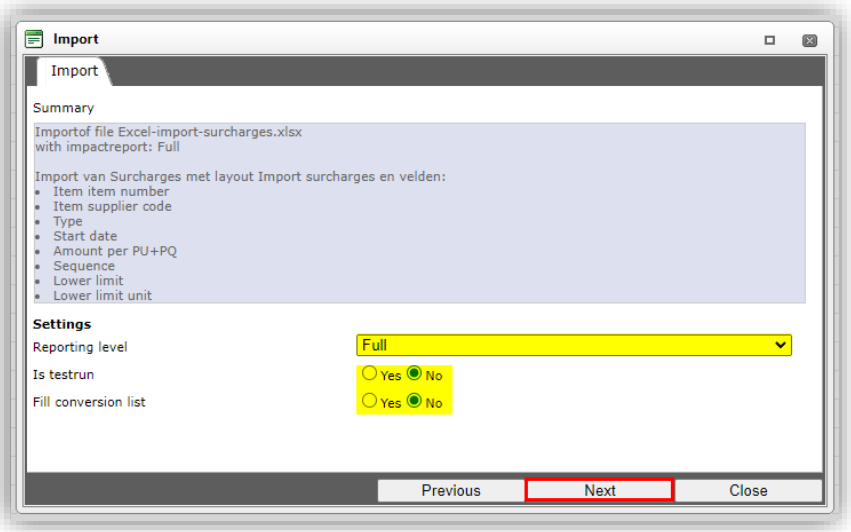


a. **Available fields**: Fields which can be added to your layout.

b. **Selected fields**: Selected fields which will exported.
   > **and <**: Use these buttons to either add to or remove fields from the *Selected fields*.

Next, click on *Save record* to save your layout[12]. After saving the export layout, you will return to the *Import* dialog.

5. Click on *Next* to go to the Import settings:



a. **Reporting level**: Select the reporting level for the import report:
   i. **None**: Do ***not*** generate an import report. This will result in the fastest import.
   ii. **All except the product class features**: Generate an import report, but exclude any checks on (ETIM) Product Features. This is the ***default setting*** for all imports and will result in a faster import.
   iii. **Full**: Generate a full import report, including all changes in all fields. This will result in the slowest import as all data fields will be checked.
   iv. **Only warnings**: Generate an import report only listing warnings. This import is generally faster than with a Full report.
b. **Only warnings**: Generate an import report only listing warnings. This import is generally faster than with a Full report.
c. **Is testrun**: Set to *Yes* to simulate an import; this will only generate an import report listing any potential errors and/or warnings. No data is actually imported!
d. **Fill conversion list**: Set this option to *Yes*, if you need to fill any Conversion lists that you have created; see also paragraph **3.2.3 ARCHIVE /** Restore records
e. The Archive Status of a record can also be changed using an import file. The import file should contain a data column labelled *Archived*, where the archive status can either be set to `Yes` (record is archived) or `No` (record is not archived):

[12] Important: Import layouts are created for ***one*** specific Data Entity only, for instance when creating an import layout for the Product overview the layout will be limited to importing records of the entity Product only.

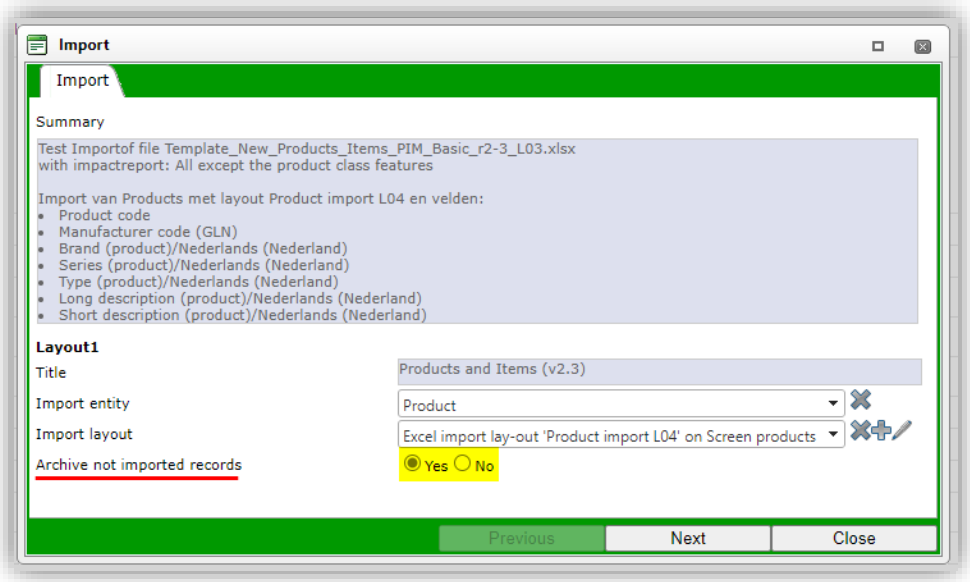
	A	F	
3	Archived	Item no.	
4	No	140043898	https://[redacted].compano.com/Data/Environ
5	No	140043899	https://[redacted].compano.com/Data/Environ
6	Yes	140043900	https://[redacted].compano.com/Data/Environ
7	Yes	140043901	https://[redacted].compano.com/Data/Environ
8	Yes	140043902	https://[redacted].compano.com/Data/Environ
9	Yes	140043903	https://[redacted].compano.com/Data/Environ
10	No	140043904	https://[redacted].compano.com/Data/Environ
11	No	140043967	https://[redacted].compano.com/Data/Environ

Archive products/items on import
For the import of Products and Items only, an alternative archiving option is available:

In the Import dialog the option Archive not imported records can be set to Yes. Any Products (or Items) which are present in the COS database, but are ***no longer offered*** as a record in the Import file (Excel or text-based), will then be archived.

Important: The **Archive not imported records** option will only be available when an Import layout is selected that contains the key data fields for the entities Product or Item.

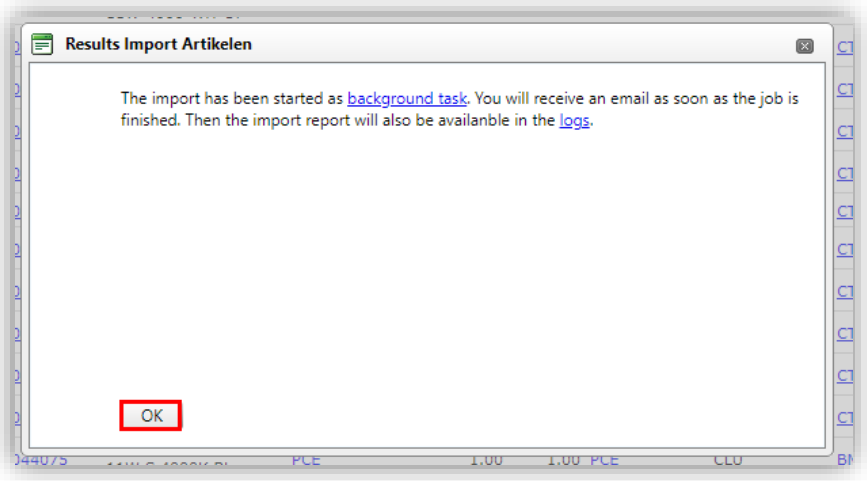
Note: Not imported records will only be archived when the import report contains no ***errors*** (!)



Note: Archiving of products**/items using the** Archive not imported records will also function when the layout is used for a Periodic Import Task.

f. Conversion table

6. Click on *Next* to start the import; you will receive the following pop-up message:



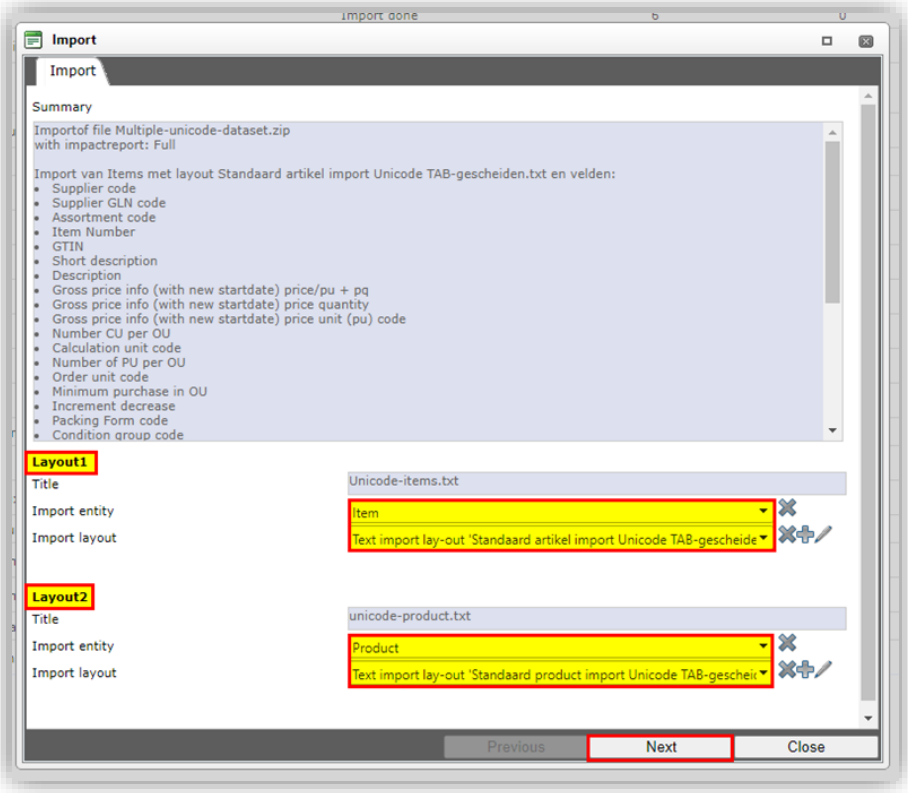
3.2.1 Multiple data sources

The Universal import method also provides for importing multiple data source at once. The following data files can contain multiple data sources:

- **Multiple worksheets** (Excel): An Excel file with multiple data worksheets.
- **Compressed file** (ZIP, BZIP): Compressed format containing multiple ***text*** data files.
  Important: The compressed file can only contain data files in text-format (CSV or Unicode).

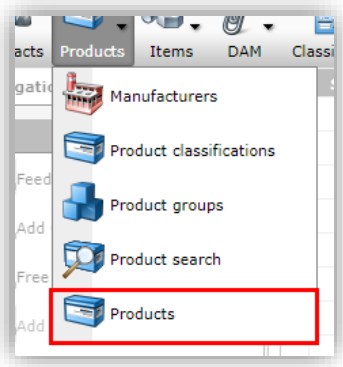
Note: Each data source needs to be linked to an ***Entity*** and imported with a ***separate import layout***.

On import, an ***Entity*** and ***Layout*** need to be assigned to each data source, as demonstrated below:

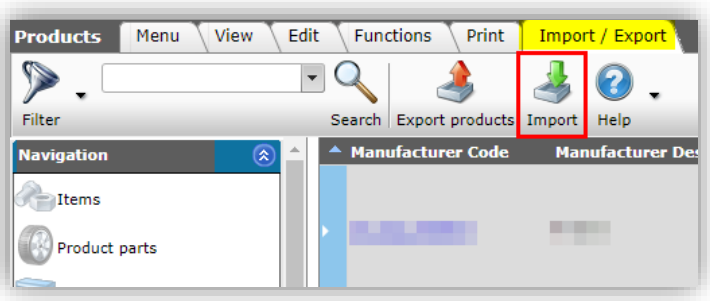


To import multiple data sheets or files:

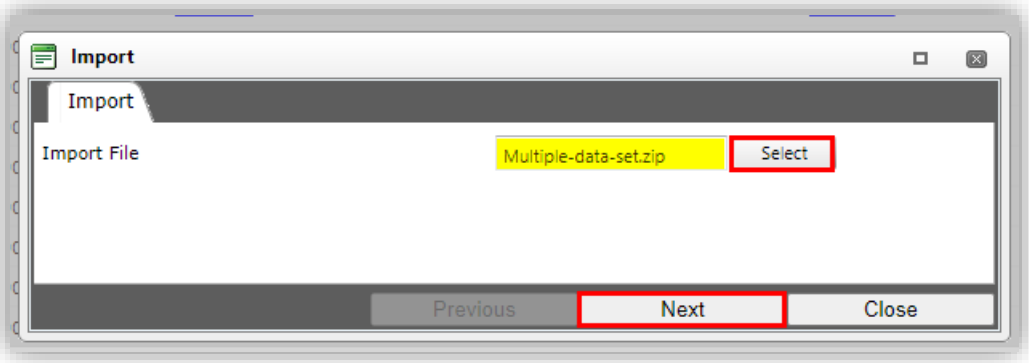
1. Through the Menu go to any data entity, for instance Products:



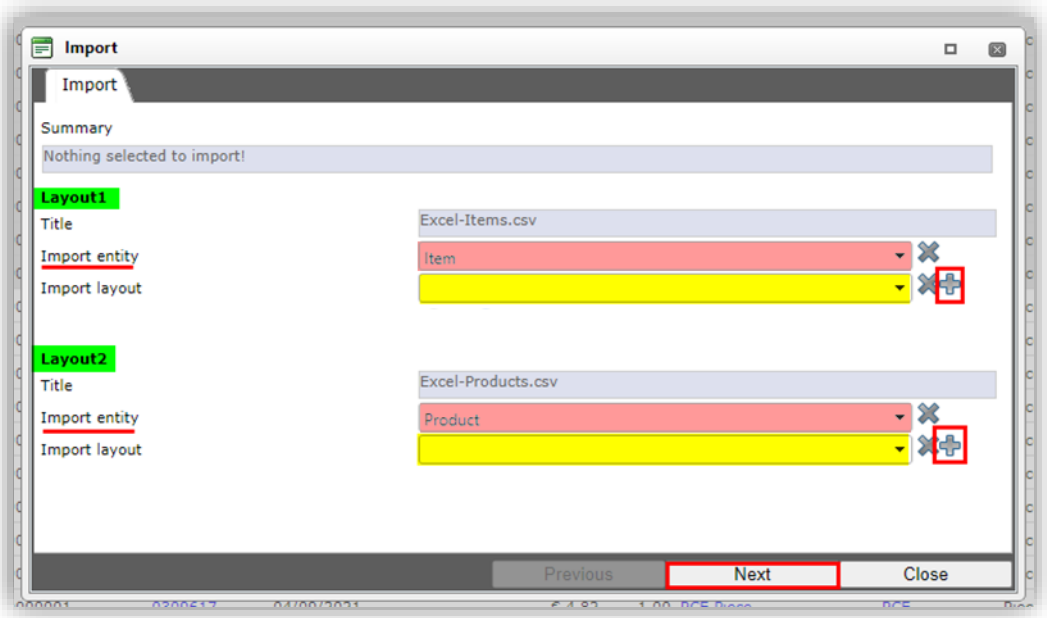
2. Go to the Import/Export tab and click on *Import*:



3. In the pop-up window, select your multiple data file, and click on *Next*:



4. In the next window, you will be presented with one or more data Layouts. If your import file contains multiple text data files or Excel worksheets, these are automatically detected and named `Layout1`, `Layout2`, etc.:

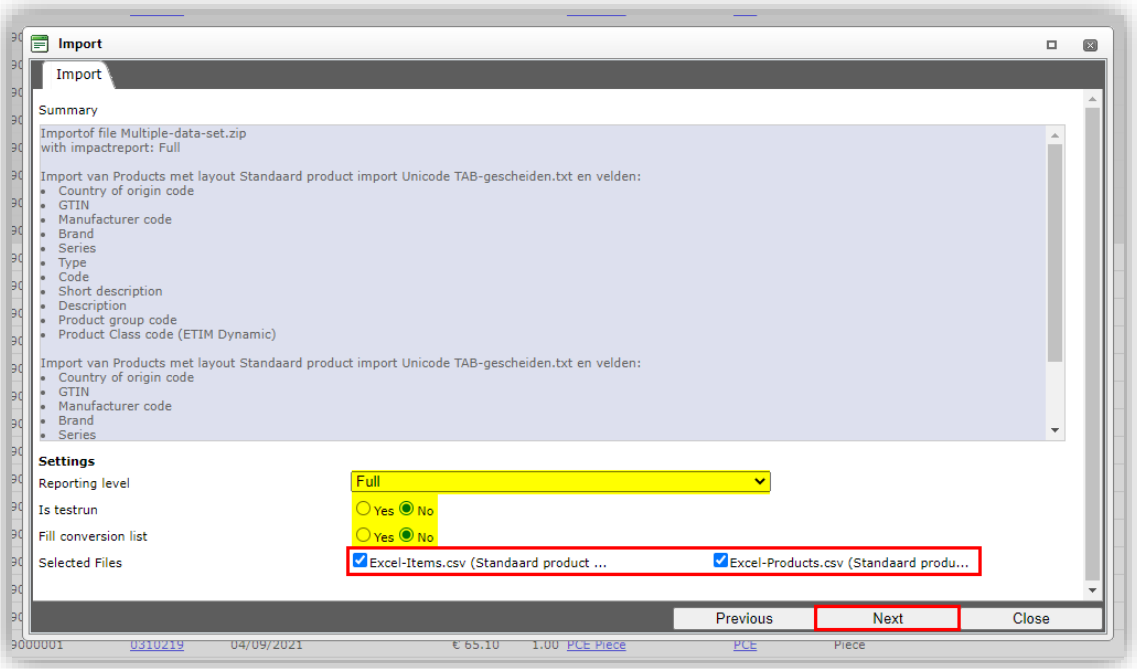


For each Layout:

a. **Import entity**: Select an Import entity.
b. **Import layout**: Select an Import layout, or—alternatively—, add a create an import layout using the **+**-buttons.

Note: Optionally ***skip importing*** of a data Layout by ***not selecting*** an Import entity and/or Import lay-out.

5. Click on *Next* for the *Import settings*:



a. **Reporting level**: Select the reporting level for the import report:
   i. **None**: Do ***not*** generate an import report. This will result in the fastest import.

ii. **Full**: Generate a full import report, including all changes in all fields. This will result in the slowest import as all fields will be checked.
iii. **Only warnings**: Generate an import report only listing warnings. This import is generally faster than with a Full report.

b. **Is testrun**: Set to *Yes* to simulate an import; this will only generate an import report listing any potential error and/or warnings. No data is actually imported!
c. **Selected files**: (De-)select the files from your multiple data set which you need to import.

6. Click on *Next* to start the import. You will receive an e-mail with an Import report.

3.2.2 Multi-pass import

A multi-pass import allows for multiple, consecutive imports of data with different import layouts. This method can be used for:

- Import of interdependent data sources, such as:
  - Product and Item
  - Item and multiple Attachments
  - Item with Current and Future Price
- Import of column-based data sources, such as Items with different Packaging data, ordered in consecutive Excel columns.
- One Periodic Task instead of multiple, interdependent periodic tasks, for example, for importing product and item data.

Important: A maximum of ***5 consecutive imports*** can be handled this way.

Note: Multi-pass imports can make use of Excel or CSV data files, provided the correct type of import layout is selected.

For detailed instructions, see the *Manual Periodic Tasks*, which is available on the Compano Help website.

Multi-pass imports need to be prepared and tested:

- First, set up and test the import of the main entity; for instance Product data.
- Next, set up and test the import of the subsequent data/entity; for instance Item data.
  - Optionally, repeat this step for the remainder of the subsequent data/entity imports.
- Create the multi-pass import by linking the main and subsequent import(s).

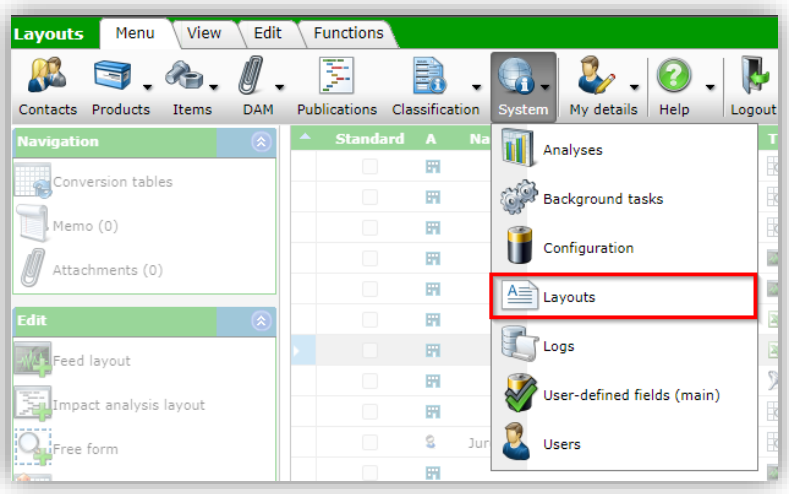
Example
To set-up a multi-pass import, for example to import Product and related Item information:

1. First, prepare the import layout for the ***main entity***, which is Product data in this example.

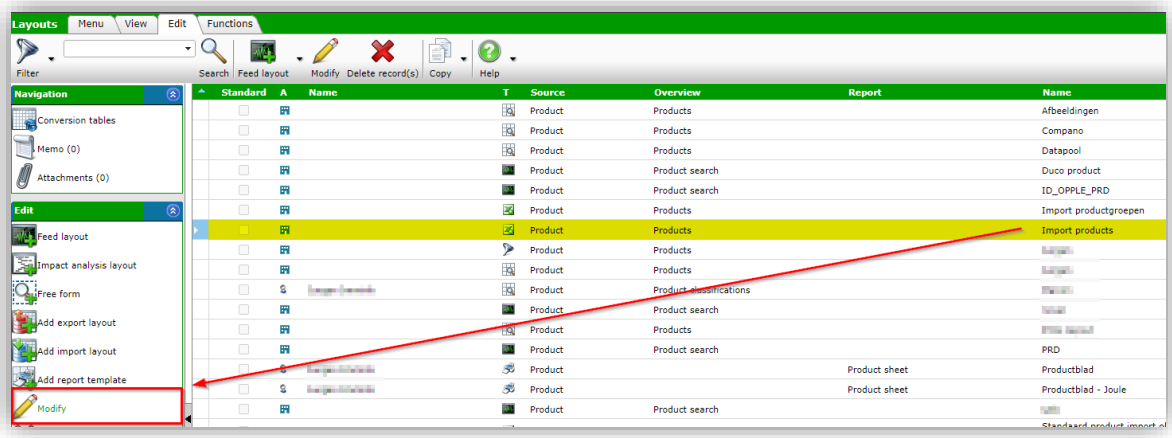
   Note: Detailed information on how to add an import layout, can be found in paragraph **4.2 ADD IMPORT LAYOUT**.

2. Use the import layout and your data file to test the import; see **PARAGRAPH 3.2 CUSTOM IMPORT** for detailed instructions.
3. Next, prepare the import layout for the ***subsequent data/entity***, which is Item data in this example.

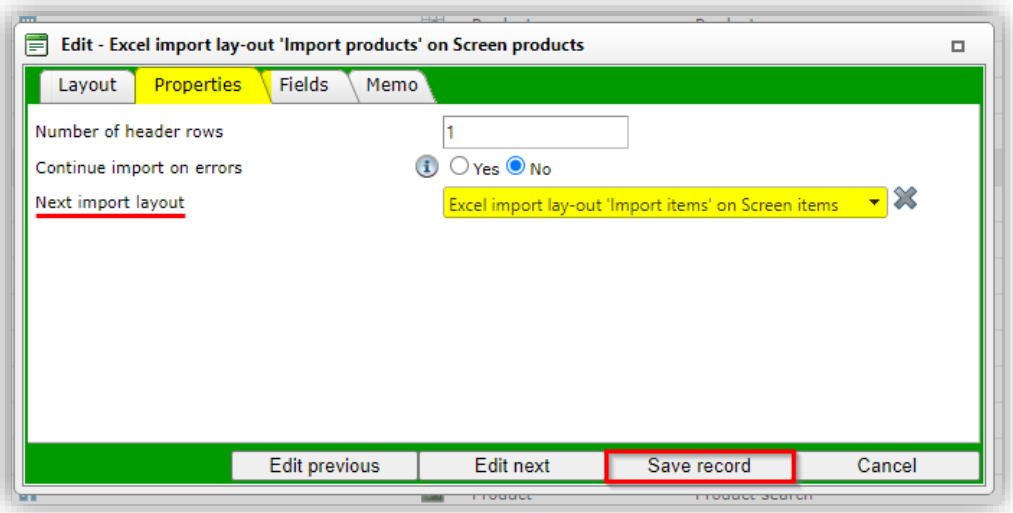
4. Use the import layout and your data file to test the import; see PARAGRAPH 3.2 CUSTOM IMPORT for detailed instructions.
5. Now, go to *System > Layouts*.



6. Select the import layout of your ***main entity*** and, under Edit, click on *Modify*.



7. In the pop-up window, on the Properties tab:

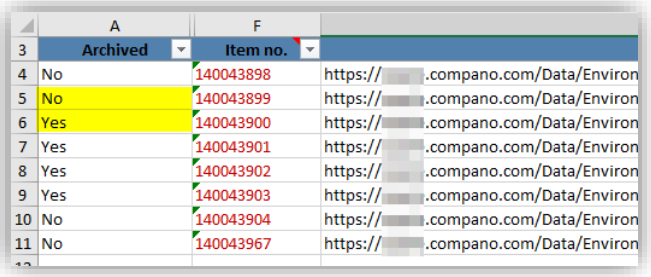


   a. **Next import layout**: Select the import lay-out for the subsequent data/entity import.

8. Save the record.

3.2.3 Archive / Restore records

The Archive Status of a record can also be changed using an import file. The import file should contain a data column labelled *Archived*, where the archive status can either be set to Yes (record is archived) or No (record is not archived):



	A	F	
3	Archived	Item no.	
4	No	140043898	https://[redacted].compano.com/Data/Environ
5	No	140043899	https://[redacted].compano.com/Data/Environ
6	Yes	140043900	https://[redacted].compano.com/Data/Environ
7	Yes	140043901	https://[redacted].compano.com/Data/Environ
8	Yes	140043902	https://[redacted].compano.com/Data/Environ
9	Yes	140043903	https://[redacted].compano.com/Data/Environ
10	No	140043904	https://[redacted].compano.com/Data/Environ
11	No	140043967	https://[redacted].compano.com/Data/Environ

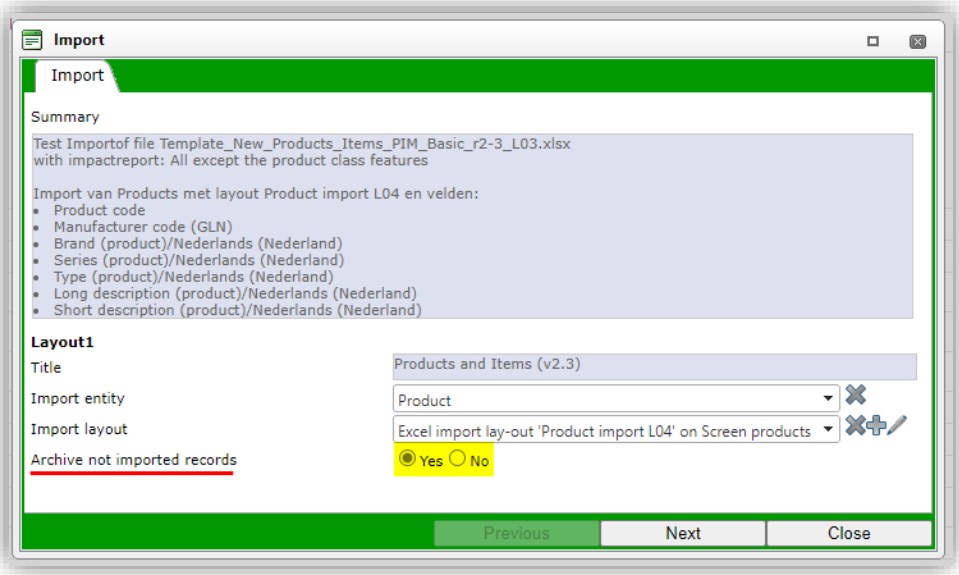
3.2.3.1 Archive products/items on import

For the import of ***Products and Items only***, an alternative archiving option is available:

In the Import dialog the option **Archive not imported records** can be set to Yes. Any Products (or Items) which are present in the COS database, but are ***no longer offered*** as a record in the Import file (Excel or text-based), will then be archived.

Important: The **Archive not imported records** option will only be available when an Import layout is selected that contains the key data fields for the entities ***Product*** or ***Item***.

Note: Not imported records will only be archived when the import report contains no ***errors*** (!)



Note: Archiving of products/items using the **Archive not imported records** will also function when the layout is used for a Periodic Import Task.

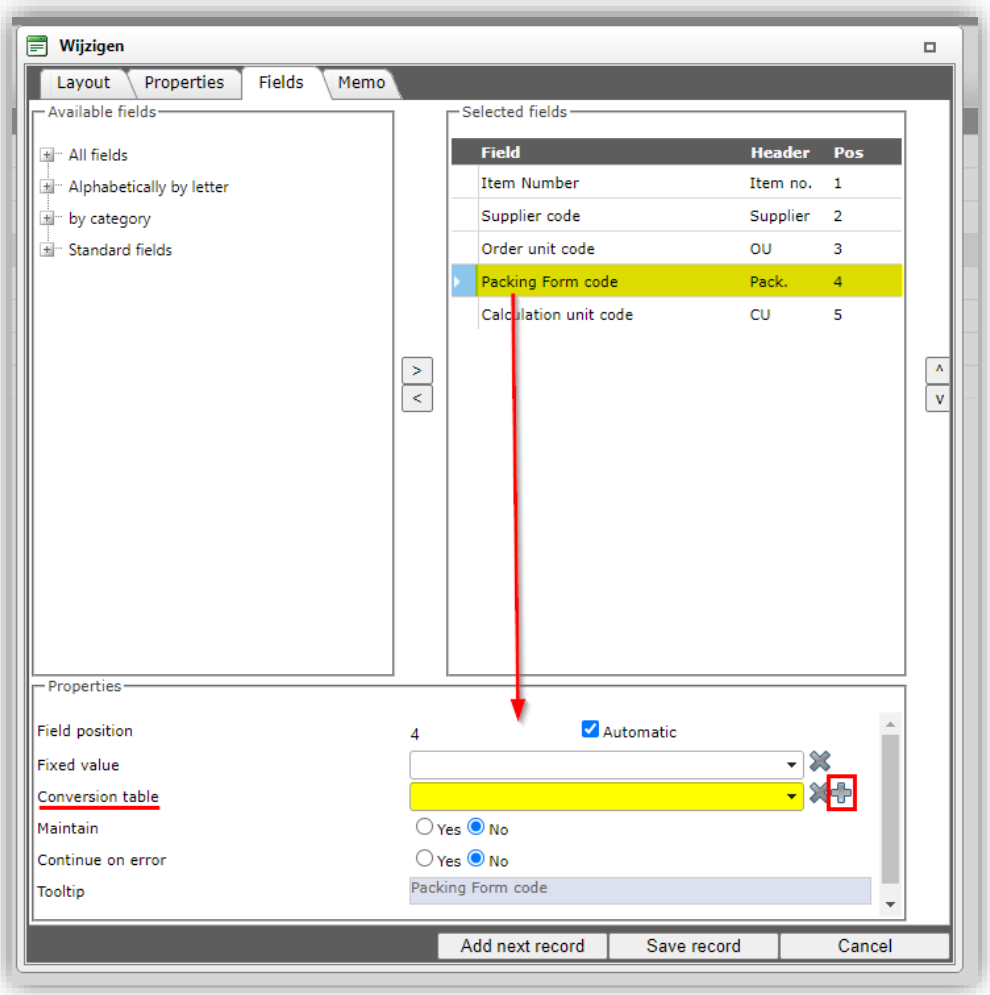
3.2.4 Conversion table

For some data fields, you can define a ***conversion table***. This is useful if your import file contains non-standard values for the data field in question. For instance, for the field *Packing Form* a conversion table can, on import, convert the value `PALLET` to code `09` for *Returnable pallet*.

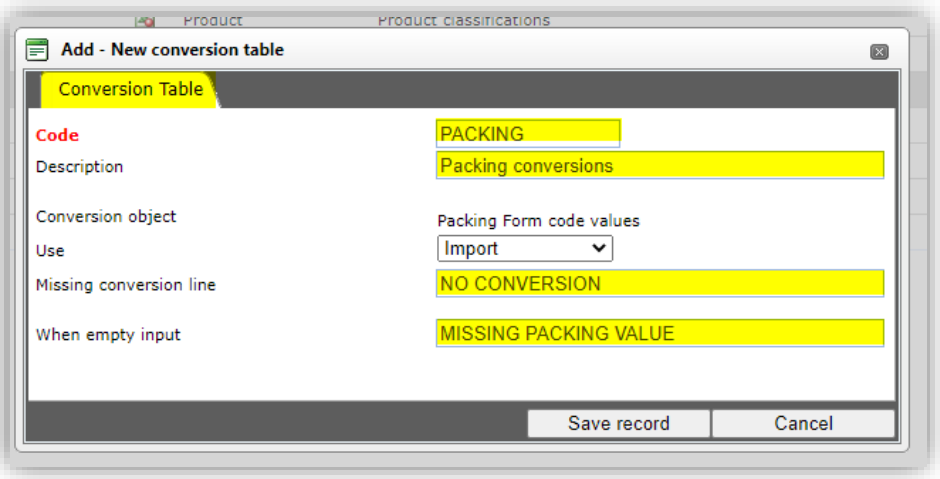
Note: Not all data fields have the conversion list option.

To add a conversion table:

1. At the field with the *Conversion table* option, click on the **+**-icon:



2. In the pop-up window:



a. **Code**: Enter a code for the Conversion table
b. **Description**: Enter a description for the Conversion table
c. **Conversion object**: Name of the object (auto-filled)
d. **Use**: Table is used for either *imports* or *exports*.
e. **Missing conversion line**: If the value is missing in the conversion table, write the value of this field into COS. If left empty, the original value from the (import) file is written.
f. **When empty input**: If there is no value for this field in the (import) file, write the value of this field into COS. If left empty, no value is written.

3. Save the conversion table.

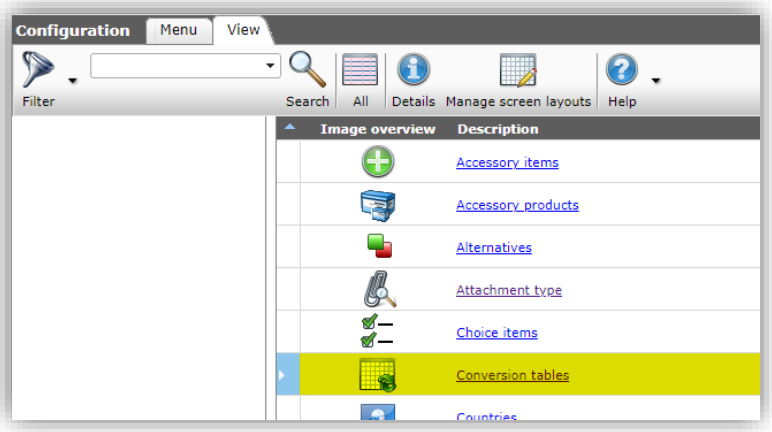
Once the Conversion Table has been created, you have to option to either:

- **Manually fill** the conversion table at *Configuration > Conversion* tables, or
- **Automatically fill** the conversion table, by setting the Fill conversion list option at import.

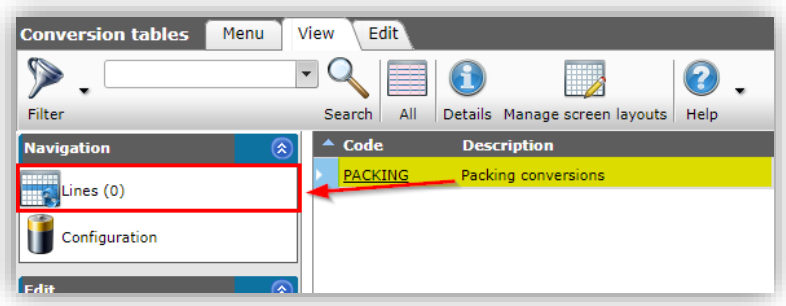
3.2.4.1 Manually fill conversion table

To manually fill the conversion table:

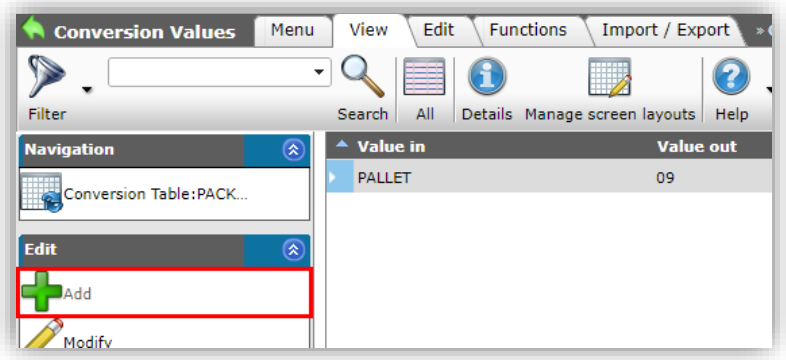
1. Through the Menu, go to *Configuration > Conversion tables*:



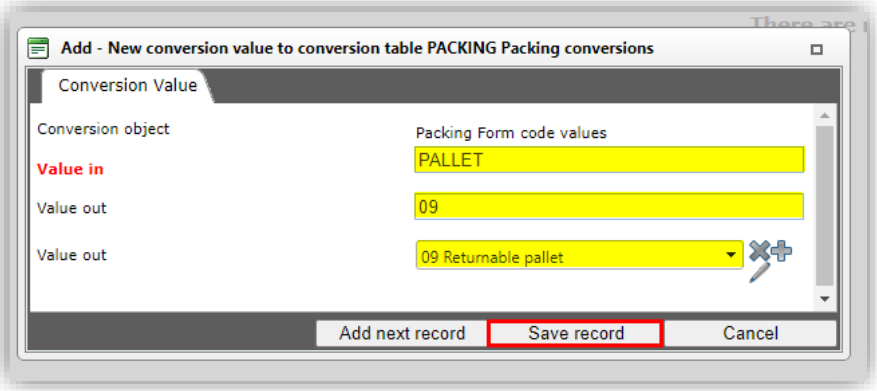
2. In the Conversion Table overview, select the conversion table you need to fill and click on *Lines*:



3. In the next screen, under Edit, click on *+Add* to add conversion lines:



4. In the pop-up windows:



   a. **Conversion object**: Name of the conversion object (auto-filled)
   b. **Value in**: Enter the value, such as encountered in your (import) file, which is to be converted.
   c. **Value out**: Enter the converted value, or choose a standard value from the drop-down list.
5. Save the record.

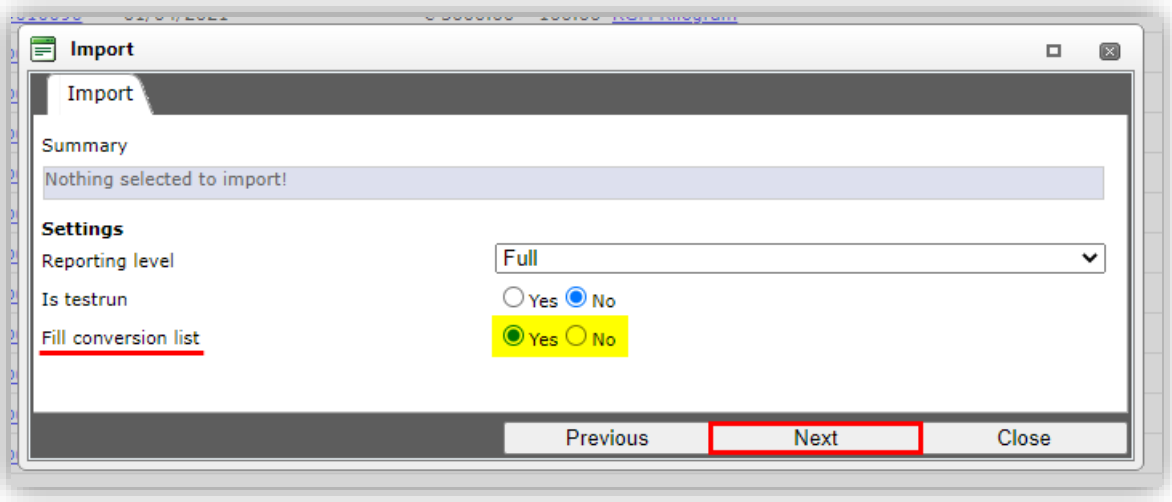
Note: Add as many conversion lines as are need to convert all different values in your (import) file. Alternatively, you have to option to automatically add a conversion line for all different values in your (import) file; see the next paragraph.

3.2.4.2 Automatically fill conversion table

To automatically fill the conversion table:

1. Through the menu, go to the overview where you need to import data.
2. Go to the tab Import/Export and click on Import.

3. In the pop-up window, select an import file and click on *Next*.
4. In the next dialog window, select an Import entity and Import layout, and click on *Next*.
5. In the next dialog window, set the option **Fill conversion list** to *Yes*.



6. Click on Next to start the import. Note: No actual import will take place; only the Conversion list (table) will be filled. You will receive two e-mails, one analysis report concerning the added conversion values, and one import report stating that the import has finished without any changes:

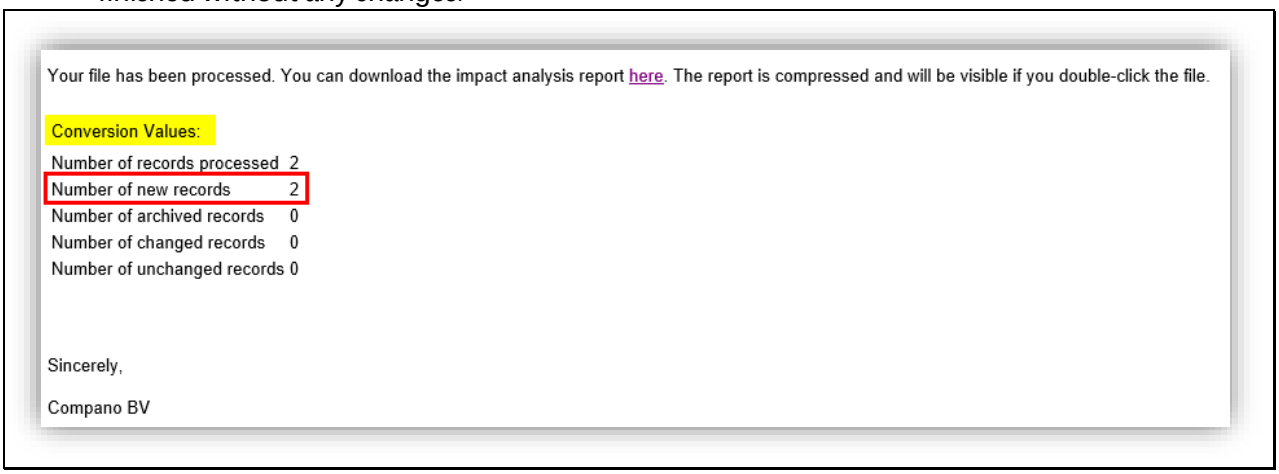


Figure 3. Conversion analysis report

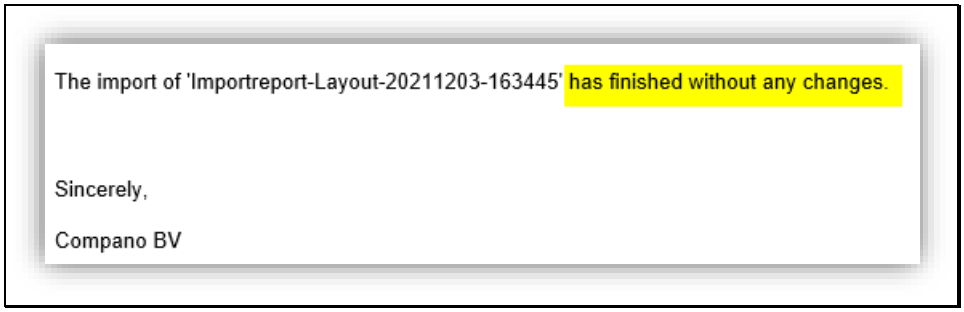
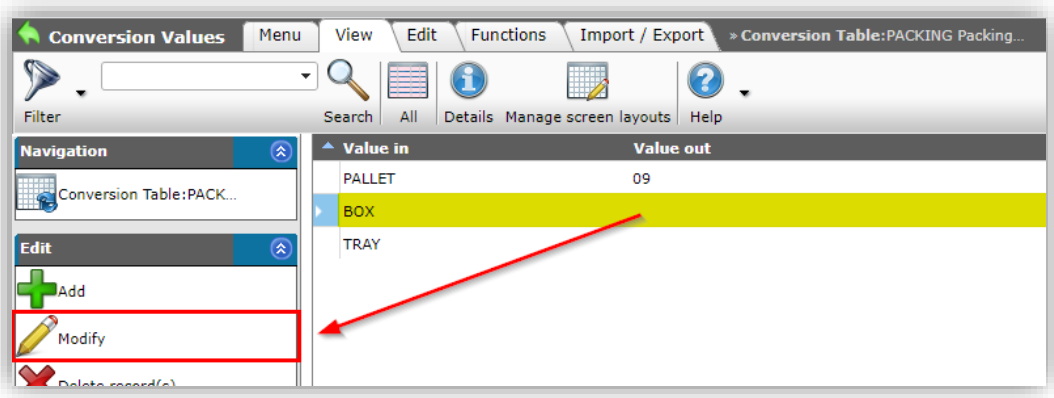


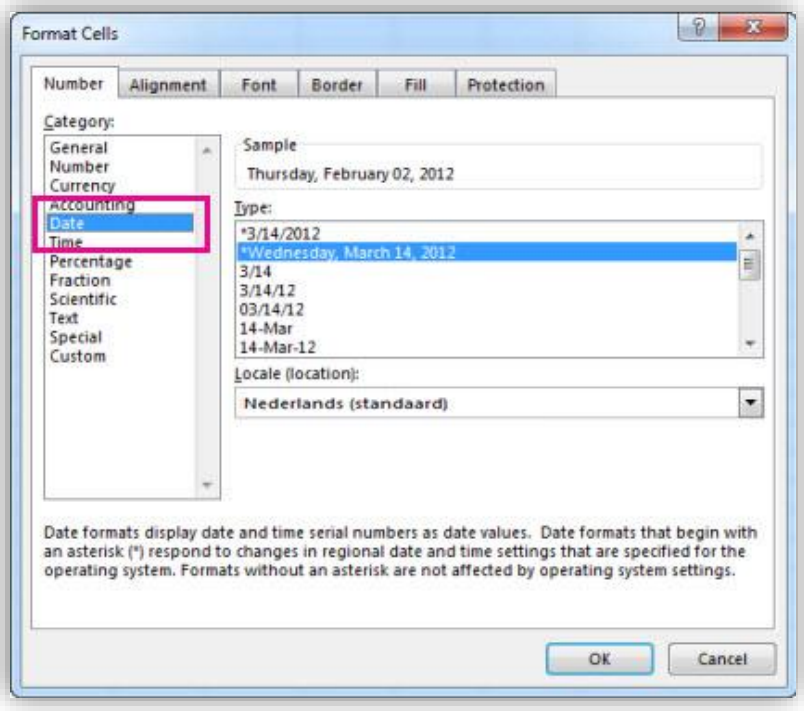
Figure 4. Import report

7. Conversion lines have been added to your conversion table, however you will need to *Modify* each line to enter the Out values (see also **3.2.4.1 MANUALLY FILL CONVERSION TABLE**):

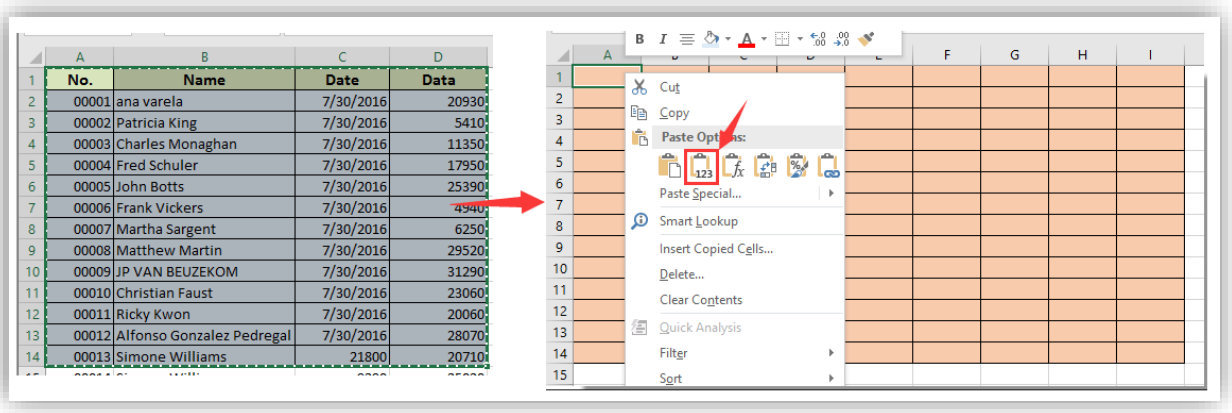


3.2.5 Date fields

Special care should be taken when importing dates. Date fields in Compano expect a true date-formatted value; when using an Excel file as your import file, make sure that Excel cells containing date values are of the correct cell format: *Date*.

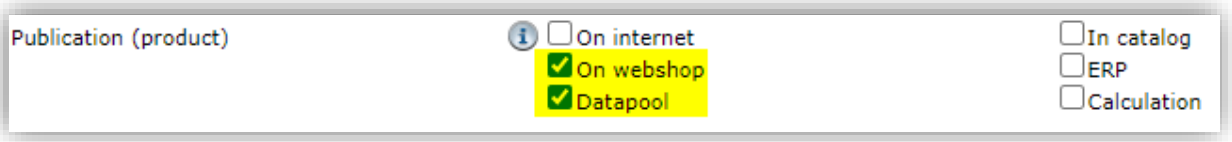


To avoid formatting when **copying/pasting data** from another source, make sure to paste your data in Excel using the *Paste special* option `Paste value only`:

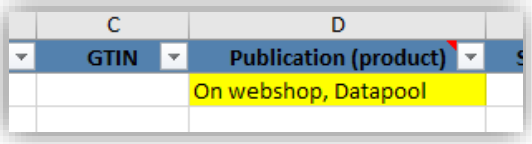


3.2.6 Multi-select fields

Values for multi-select data fields—such as `Publication`—where multiple options can be selected, can be imported using a comma as a separator between values:



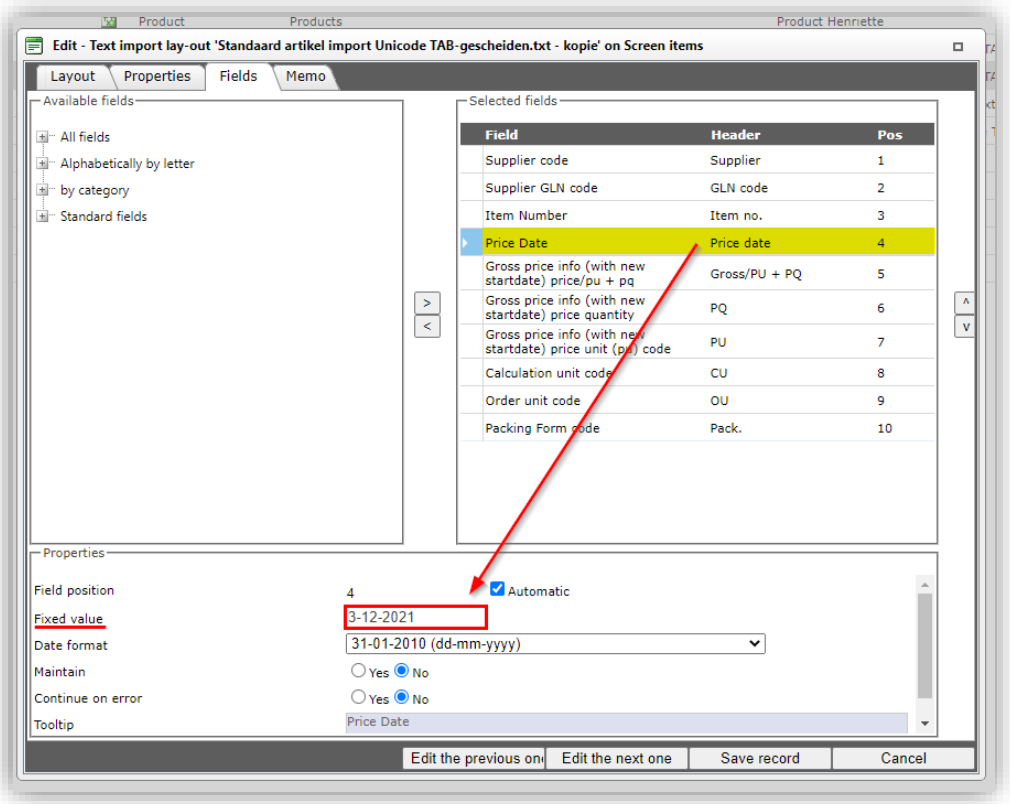
To import values for this data field, values should be separated with a comma:



3.2.7 Fixed values

For some fields in your layout, ***fixed values*** can be used. Two scenarios with fixed values are:

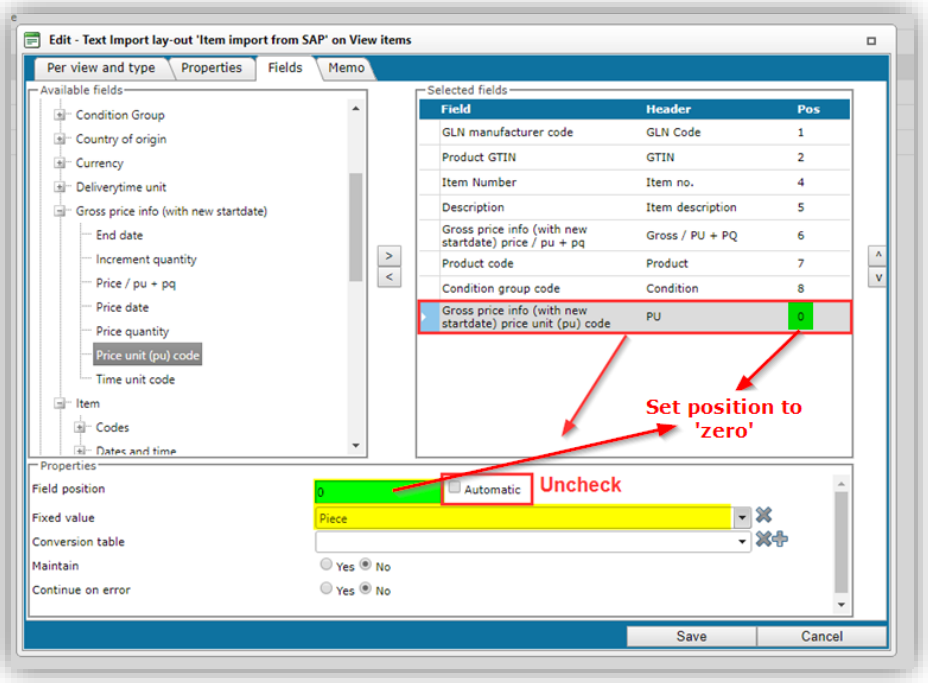
- For all data records, the value is the same, fixed value. For instance, *Price Unit*
- Wherever the value for the data field is ***empty*** in the import file, a fixed value should be written into COS. For instance, price data:



To add a value for a (mandatory) data field which is not present in your import file and which for all records should have the same value.

For example, if in your import file the column *Price Unit* is not present and for ***all*** items the value of *Price Unit* should be 1, then you can add this as a ***fixed value***:

1. In the Add/Edit layout dialog, on the Fields tab, add the field *Price unit (pu) code*.



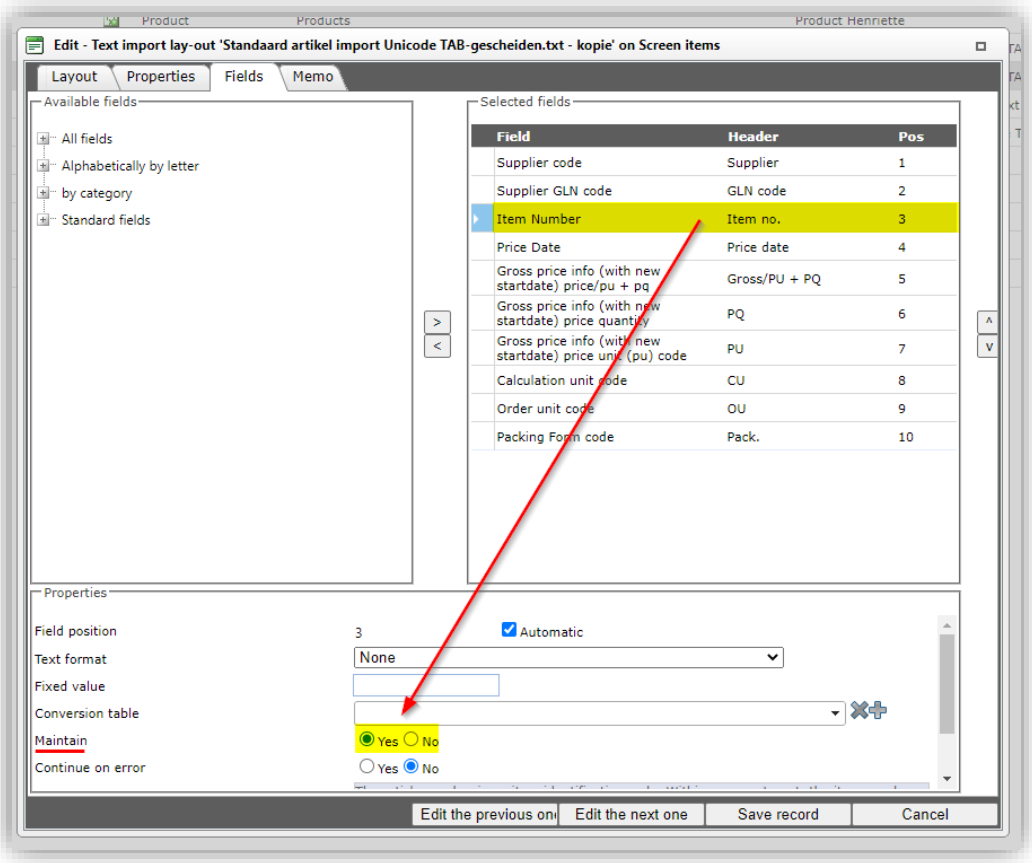
2. Under *Selected fields*, select the field you just added and, at Properties, uncheck the checkbox *Automatic*.
3. Now, type the value `0` for *Field position*. Select a fixed value from the drop-down menu; in this case the value `Piece (PCE)`.
4. Save the layout.

When importing item information, using this layout, all items will have the value `PCE` assigned to the value for their `Price Unit`.

Important: With this method, the ***position*** of data in the import file can be set to `0`, as no actual data will be read from the data file.

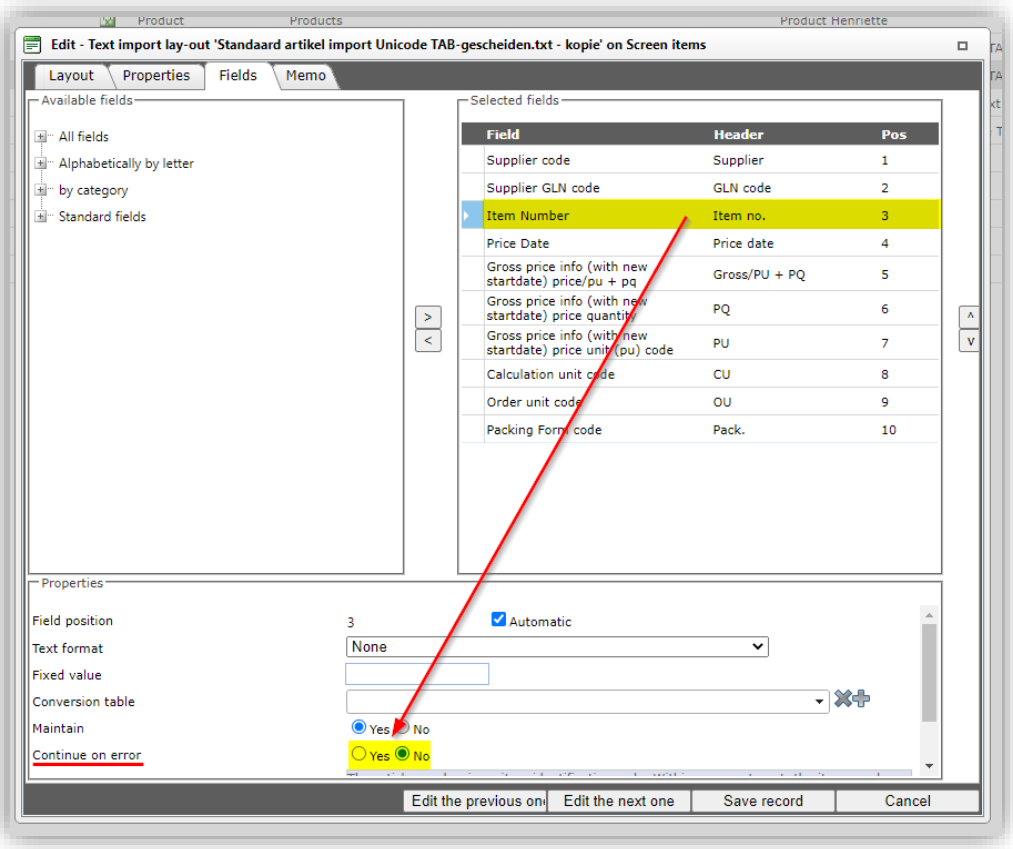
3.2.8 Maintain values (do not overwrite)

To prevent overwriting of data in COS on import, set the *Maintain* option of a data field to *Yes*.



3.2.9 Continue on error

By default, any imports are terminated when the import process encounters an error. Should the import continue on errors for a certain data field, then set the *Continue on error* option to *Yes*.



3.2.10 Concatenate (merge) descriptions

Multiple data columns in an import file can be merged, on import, to yield a concatenated text value which will be entered into the *Description* or *Short Description* data field in COS.

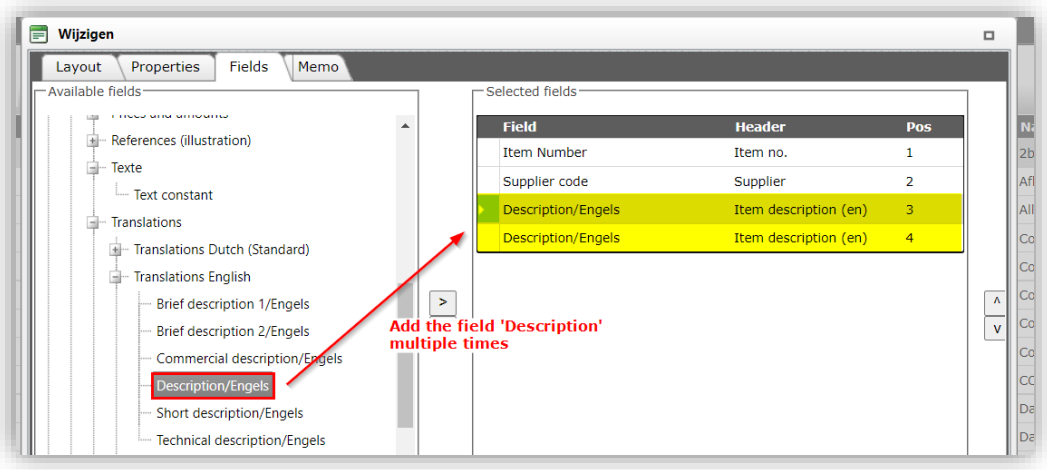
Note: This feature is available for text-based import formats, such as CSV and UNICODE and applies to the following data fields:

- *Product Description*
- *Product Short Description*
- *Item Description*
- *Item Short Description*

Example CSV

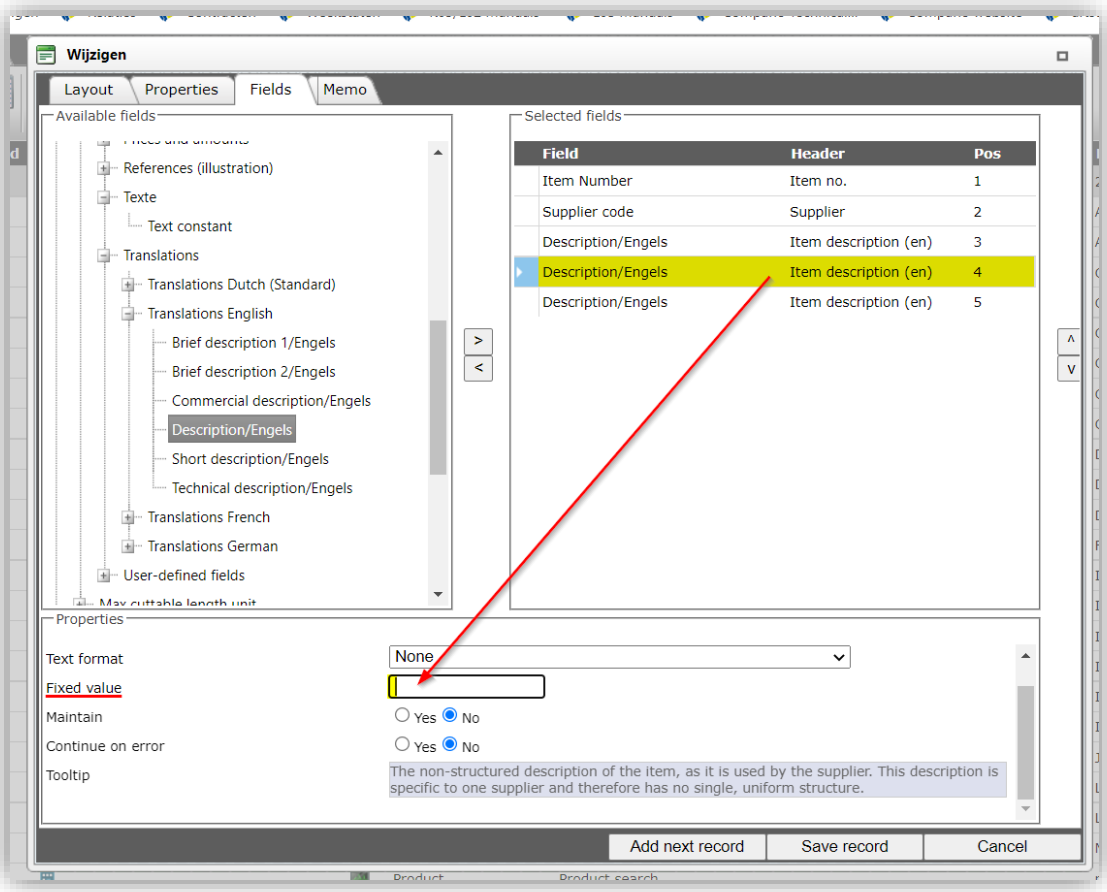
```
Item number;Assortment code;Text 1;Text 2
2345;VX_NL;This is the first part;and this the second part of the description
2346;VX_NL;This is the first part;and this the second part of the description
2347;VX_NL;This is the first part;and this the second part of the description
```

To concatenate Texts 1 and 2 on import, the following import lay-out can be made:



In the layout above, the data field *Description* has been added twice, such that data from column 3 and 4 of the CSV import file will be merged.

Tip: By adding the data field *Description* a third time and setting a fixed value, a space character can be added between texts 1 and 2:



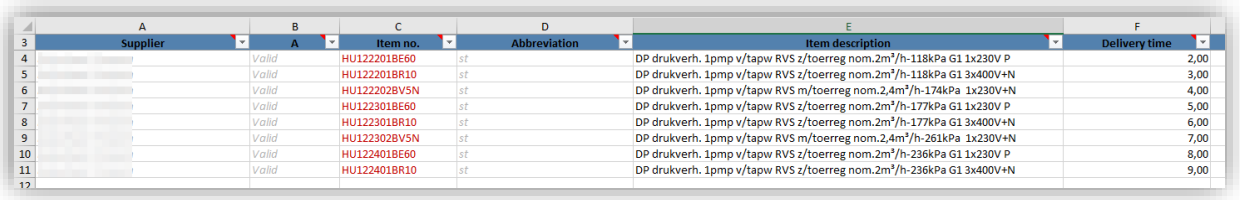
3.2.11 Country-specific fields

For country-specific fields of Item and Product, the Size Unit Code for `Weight` and `Volume` can added to the import layout thus enabling import of these values, including Imperial values.

3.3 Update import [ExcelForImport]

The data in an ExcelForImport-file can be edited using Microsoft Excel:

1. Open the exported Excel-file:



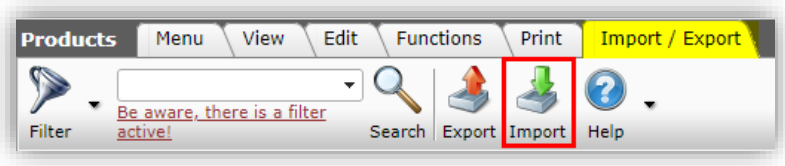
	A	B	C	D	E	F
3	Supplier	A	Item no.	Abbreviation	Item description	Delivery time
4		Valid	HU122201BE60	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-118kPa G1 1x230V P	2,00
5		Valid	HU122201BR10	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-118kPa G1 3x400V+N	3,00
6		Valid	HU122202BV5N	st	DP drukverh. 1pmp v/tapw RVS m/toerreg nom.2,4m³/h-174kPa 1x230V+N	4,00
7		Valid	HU122301BE60	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-177kPa G1 1x230V P	5,00
8		Valid	HU122301BR10	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-177kPa G1 3x400V+N	6,00
9		Valid	HU122302BV5N	st	DP drukverh. 1pmp v/tapw RVS m/toerreg nom.2,4m³/h-261kPa 1x230V+N	7,00
10		Valid	HU122401BE60	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-236kPa G1 1x230V P	8,00
11		Valid	HU122401BR10	st	DP drukverh. 1pmp v/tapw RVS z/toerreg nom.2m³/h-236kPa G1 3x400V+N	9,00
12						

2. When editing data in any cell, please note:
   a. **Black font:** Data field is editable and can also be empty
   b. **Grey font** The data cell is protected against editing. You ***cannot*** edit greyed-out data fields
   c. **Red font**: This data field is required; the cell cannot be empty (!)
3. After editing, save the Excel-file.

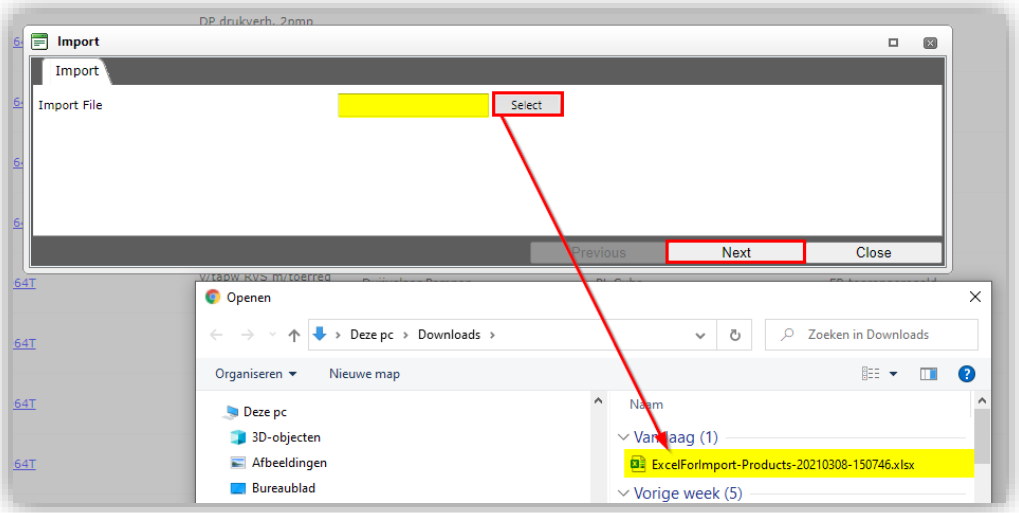
Important: The new Excel update import can ***no longer*** be used to add new records.

Updated data from a saved Excel-file[13], named `COS-ExcelForImport-Items-[DATE]-[TIME].xlsx`, can be imported back into the Compano application:

1. Through the Menu go to the data that you need to import, for instance Product data.
2. Go to the *Import/Export* tab and click on *Import*:

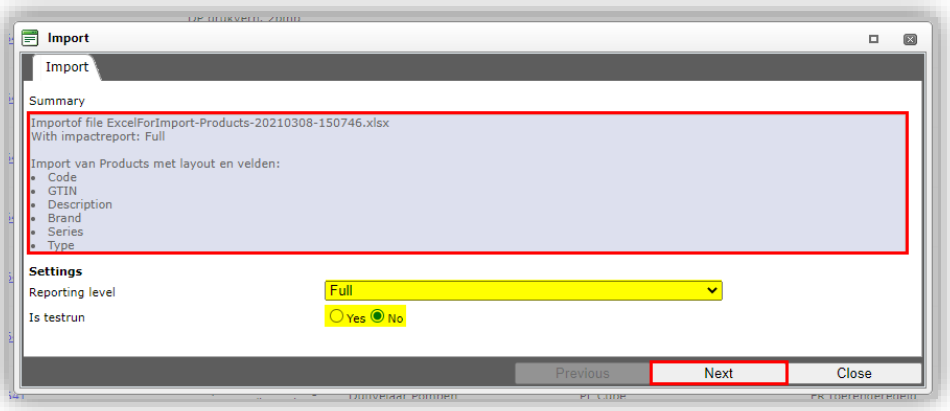


3. In the pop-up window, select the Excel-file for import and click on *Next*:

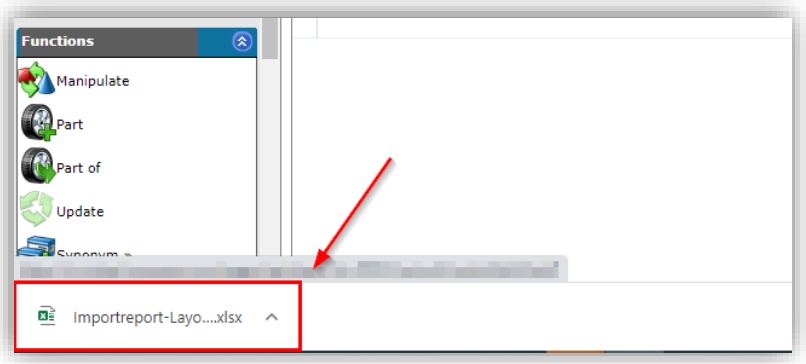


[13] Important: When renaming the *ExcelForImport* file, always make sure the filename starts with: `COS-ExcelForImport`.

4. On the next screen:



   a. **Summary**: Check which data fields will be imported.
   b. **Reporting level**: Select the reporting level for the import report:
      i. **None**: Do <u>not</u> generate an import report. This will result in the fastest import.
      ii. **Full**: Generate a full import report, including all changes in all fields. This will result in the slowest import as all fields will be checked.
      iii. **Only warnings**: Generate an import report only listing warnings. This import is generally faster than with a Full report.
   c. **Is testrun**: Set to *Yes* to simulate an import; this will only generate an import report listing any potential error and/or warnings. No data is actually imported!
5. Click on *Next* to start the import and check your browser or default Download folder for the Import report[14]:



3.3.1 Updating classification data

Updating of product classification data can be done through dedicated export layouts for product and model classes. These layouts are available on the Product and Product Classification overviews and allow for:

- Updating data for one or multiple product classes of a set of products
- Drop-down selection of alphanumeric ETIM-feature values in the exported Excel-file

<u>Note</u>: Only (ETIM) classification feature values can be updated this way. (ETIM) classes need to be assigned to products by Editing or Manipulation.

[14] <u>Note</u>: The import report is also available under *Menu > System > Logs*.

More information on updating classification data can be found in the *Manual Classification* (L03).

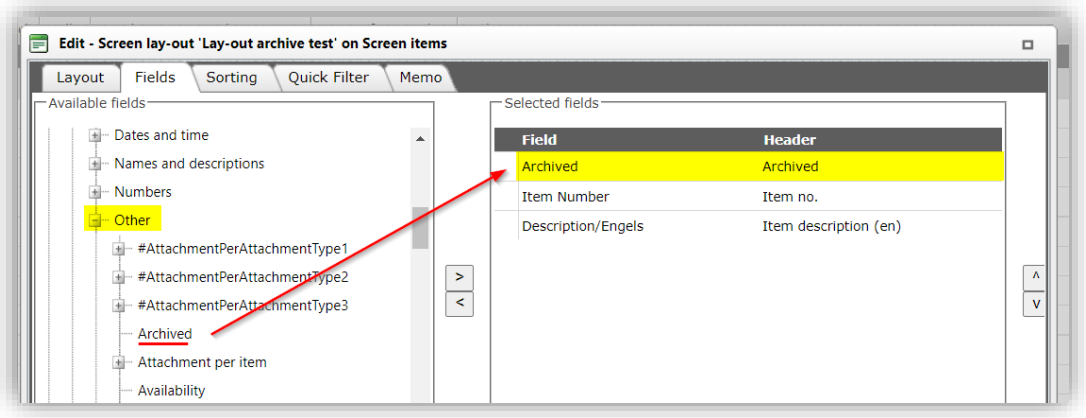
3.3.2 Updating archived records

The update import can also be used to archive or unarchive records.

The following applies to all archived records:

Archived status before import	Update *Archived* status to	Value updated on import?	*Archived* status changed to
Yes (archived)	No update	No	-
No (not archived)	No update	Yes	-
No (not archived)	Yes	Yes	Yes
Yes (archived)	No	Yes	No

The ***Archived status*** can be updated by adding the *Archived* data field to screen or export layout:



3.4 Non-standard imports

3.4.1 Attachments

For the import of Attachments a premade import template is available at the Compano Help website: *Template Import Attachments (CSV)*.

Note: Attachments can be imported using ***any*** Import button. Also, this template will be imported without the need for an import layout.

3.4.2 Conditions

Purchasing conditions can be imported using either an ICC- or XML-file. Conditions can be imported using ***any*** Import button.

For ICC-files, COS will check whether there is a purchase contract for the Supplier, that is still pending. If there is no pending contract, a new purchase contract will be created for that Supplier.

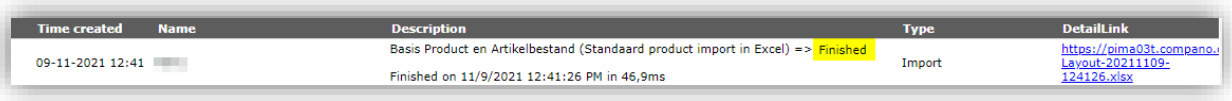
For XML-files the *Purchase contract number* must be present as a field in the XML-file.

3.5 Impact analysis

All imports will generate a ***Log entry*** and an ***Import report***.

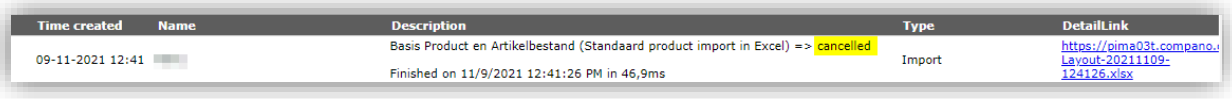
3.5.1 Import log entry

A successful import will generate an import log record stating that the import is *Finished*:



Time created	Name	Description	Type	DetailLink
09-11-2021 12:41		Basis Product en Artikelbestand (Standaard product import in Excel) => Finished Finished on 11/9/2021 12:41:26 PM in 46,9ms	Import	https://pima03t.compano. Layout-20211109-124126.xlsx

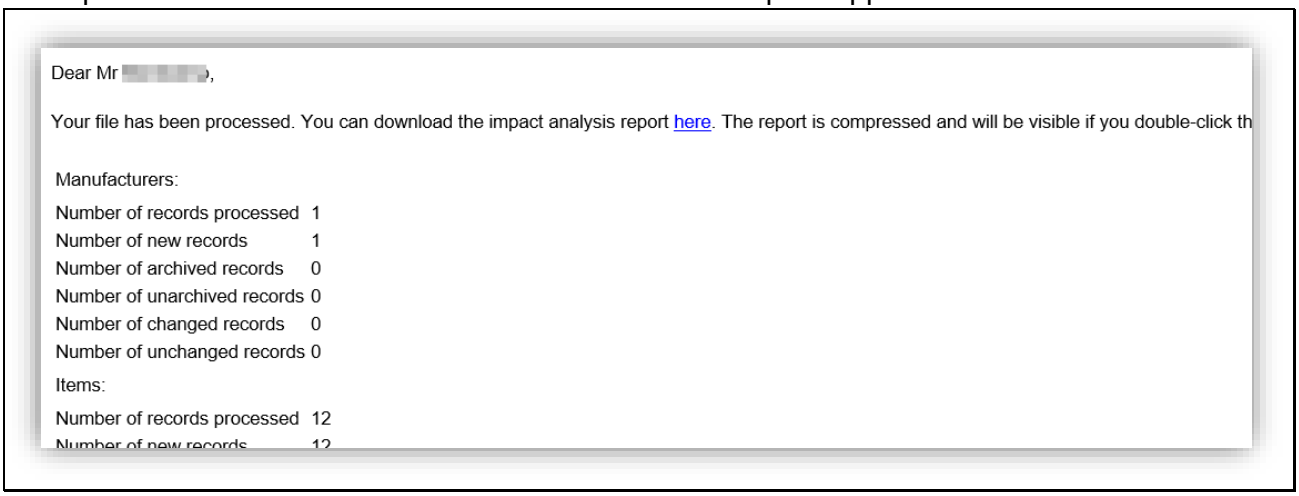
If the import terminated due to errors, you would see this listed in the logs as: *cancelled*:



Time created	Name	Description	Type	DetailLink
09-11-2021 12:41		Basis Product en Artikelbestand (Standaard product import in Excel) => cancelled Finished on 11/9/2021 12:41:26 PM in 46,9ms	Import	https://pima03t.compano. Layout-20211109-124126.xlsx

3.5.2 Import report

This report will be sent via e-mail to the admin user of the Compano application.



Dear Mr [redacted],

Your file has been processed. You can download the impact analysis report here. The report is compressed and will be visible if you double-click th

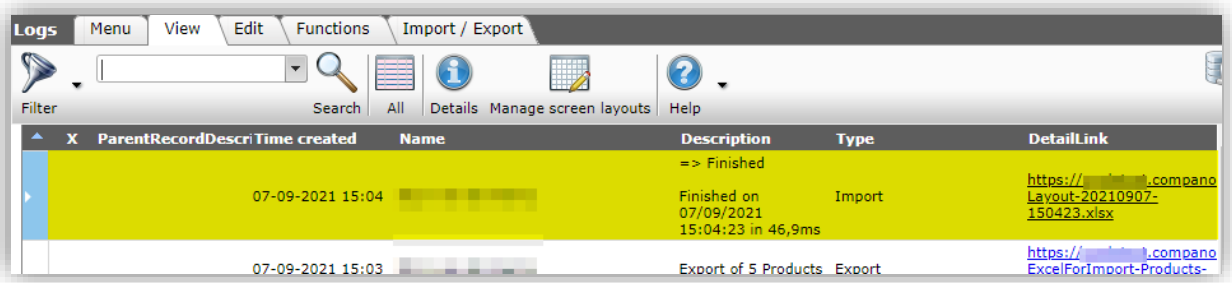
Manufacturers:

Number of records processed	1
Number of new records	1
Number of archived records	0
Number of unarchived records	0
Number of changed records	0
Number of unchanged records	0

Items:

Number of records processed	12
Number of new records	12

Other users can download the import report at *System > Logs*:



Logs | Menu | View | Edit | Functions | Import / Export

Filter | Search | All | Details | Manage screen layouts | Help

X	ParentRecordDescri	Time created	Name	Description	Type	DetailLink
		07-09-2021 15:04		=> Finished Finished on 07/09/2021 15:04:23 in 46,9ms	Import	https://[redacted].compano Layout-20210907-150423.xlsx
		07-09-2021 15:03		Export of 5 Products	Export	https://[redacted].compano ExcelForImport-Products-

The ***import report*** consists of two or more worksheets; a *Summary* and one or more worksheets listing *Changed Records*, *Errors* and/or *Warnings*:

	A	B	C	D	E	F	G
1		User	MDM Beheerder				
2		File	ExcelForImport-Products-20210308-150746.xlsx				
3		Action					
4		Date	3/8/2021 3:12 PM				
5							
6				Summary			
7		**Introduction**					
8							
9		This report describes the impact of the above mentioned action. This report contains different parts:					
10							
11		1. Below the totals of the changes per subject.					
12		2. Overview of the 10 changed products					
13							
14			**Totals**				
15				**Offered**	**Processed**	**Modified**	**Total mutations**
16			**Products**	10	10	10	10
17			**Series**			10	

	A	B	C	D	E	F	G	H
1	**Manufacturer Description**	**Code**	**GTIN**	**Product description**	**Brand**	**Type**	**Product class code**	**Series**
2	Duijvelaar pompen	HU212201C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.2,4m³/h-174kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
3	Duijvelaar pompen	HU212201C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.2,4m³/h-174kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
4	Duijvelaar pompen	HU212301C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.2,4m³/h-261kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
5	Duijvelaar pompen	HU212301C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.2,4m³/h-261kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
6	Duijvelaar pompen	HU212401C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg	Changed records	FR toerengeregeld	EC010737	PLCube
7	Duijvelaar pompen	HU212401C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg		FR toerengeregeld	EC010737	PL Cube
8	Duijvelaar pompen	HU212501C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.2,4m³/h-435kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
9	Duijvelaar pompen	HU212501C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.2,4m³/h-435kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
10	Duijvelaar pompen	HU212601C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.2,4m³/h-522kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
11	Duijvelaar pompen	HU212601C64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.2,4m³/h-522kPa G5/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
12	Duijvelaar pompen	HU214201D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.4,8m³/h-210kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
13	Duijvelaar pompen	HU214201D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.4,8m³/h-210kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
14	Duijvelaar pompen	HU214301D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.4,8m³/h-315kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
15	Duijvelaar pompen	HU214301D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.4,8m³/h-315kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
16	Duijvelaar pompen	HU214401D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.4,8m³/h-420kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
17	Duijvelaar pompen	HU214401D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.4,8m³/h-420kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
18	Duijvelaar pompen	HU216201D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.7,2m³/h-660kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
19	Duijvelaar pompen	HU216201D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.7,2m³/h-660kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube
20	Duijvelaar pompen	HU216301D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.7,2m³/h-330kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PLCube
21	Duijvelaar pompen	HU216301D64T		DP drukverh. 2pmp v/tapw RVS m/toerreg nom.7,2m³/h-330kPa G6/4 3x40	Duijvelaar Pompen	FR toerengeregeld	EC010737	PL Cube

3.5.2.1 Testrun

Setting the *Is testrun* option to Yes on any import, will result in a simulated import; no changes are saved to the database, however you will receive an import analysis report listing any errors or warnings:

	A	B	C	D	E	F	G	H
1		User	[redacted]					
2		File	COS-ExcelForImport-Products-20220815-150917.xlsx					
3		Action	EC000025					
4		Action	EC002557					
5		Action	EC002892					
6		Action	EC001744					
7		Date	18/08/2022 15:22					
8			THIS WAS A TESTRUN; no actual data was imported					
9								
10		**Introduction**						
11								
12		This report describes the impact of the above mentioned action. This report contains different parts:						
13								
14		1. Below the totals of the changes per subject.						
15		2. Overview of the 1 errors						
16		3. Overview of the 3 changed products						
17								
18			**Totals**					
19				**Offered**	**Processed**	**Unchanged**	**Modified**	**Total mutations**
20			**Products**	10	10	7	3	3
21								

3.5.2.2 No changes on import

When the import has finished without changing any data in COS, you will receive the following e-mail message:

3.6 Import anywhere

The import function automatically determines for which Entity the data is intended. This means that ***any Import button*** can be used to import any kind of data. If the system cannot determine the likely entity, the Import dialog will offer to select an Entity and Import lay-out for a correct import of the data file.

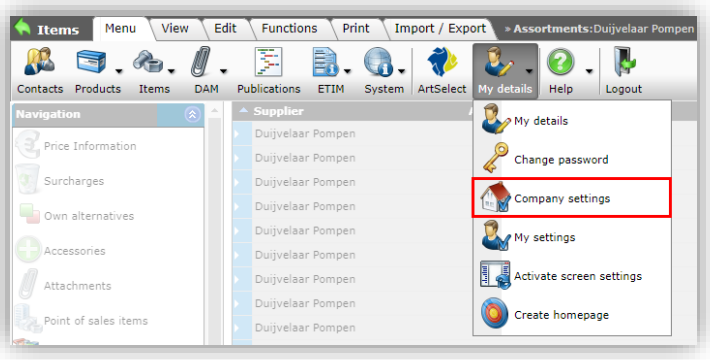
Note: Depending upon the overview you selected for importing data, changes might not be immediately apparent. Either navigate to the 'correct' overview, or refresh the browser window (F5).

3.7 Country-specific character sets

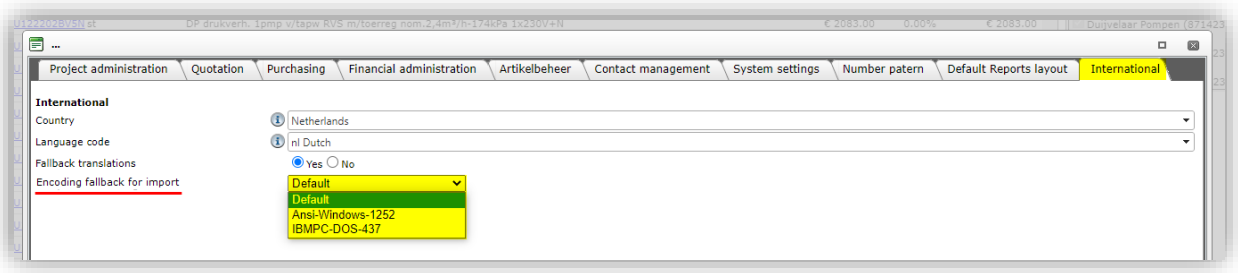
When importing text files, the character encoding of the provided import file is used. The encoding is determined via a ***Byte order mark***: https://en.wikipedia.org/wiki/Byte_order_mark. If this Byte order mark is missing in the import file, the default encoding will be used. This default encoding can be set at *Company Settings*.

To change the fallback of encoding:

1. Through the Menu go to *My Details > Company settings*:



2. In the pop-up window, go to the tab *International*:



3. Set the encoding to a different character set.
4. Save the Company settings.

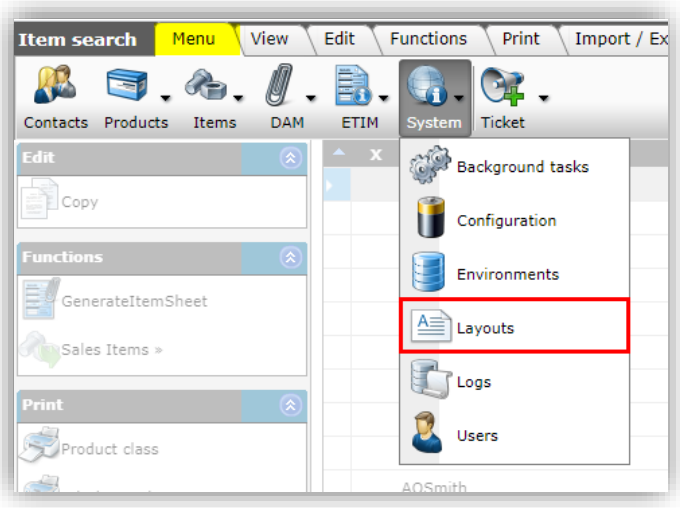
The character encoding can thus be adjusted for companies in Germany (1252) or in the south of Europe (437). The *Default* encoding setting is: UTF-8.

4 Layout management

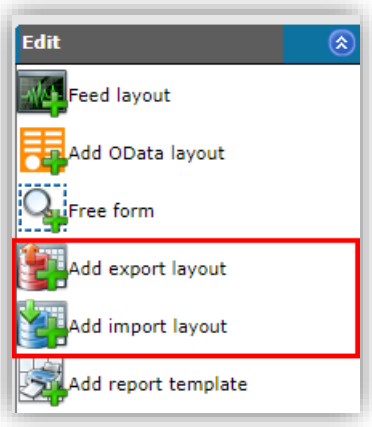
Layouts for import and export can be managed at *System > Layouts.* While the Export dialog allows for on-the-fly generation of export layouts, these are limited to exports in Excel. However, the management option under the System menu allows for definition of ***export layouts in different formats***.

To manage a layout:

1. Through the Menu, go to *System > Layouts*:



2. Next, under Edit, select either *Add Export* or *Add Import* layout:

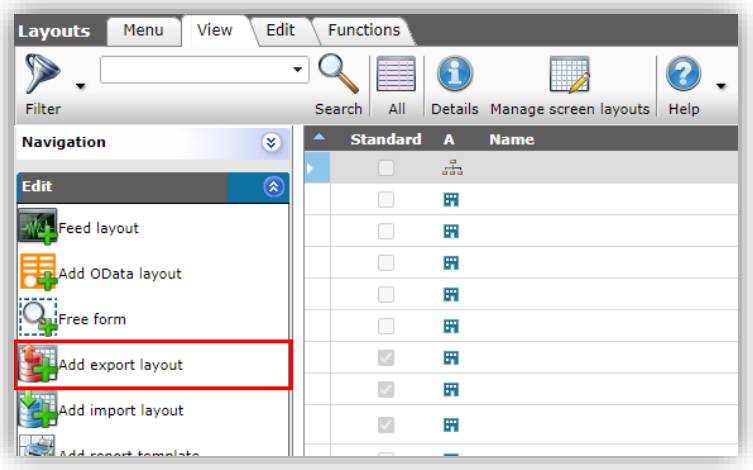


Important: A detailed explanation on creating export and/or import layouts is available in the *Basic Manual Compano Online Software L03*.

4.1 Add export layout

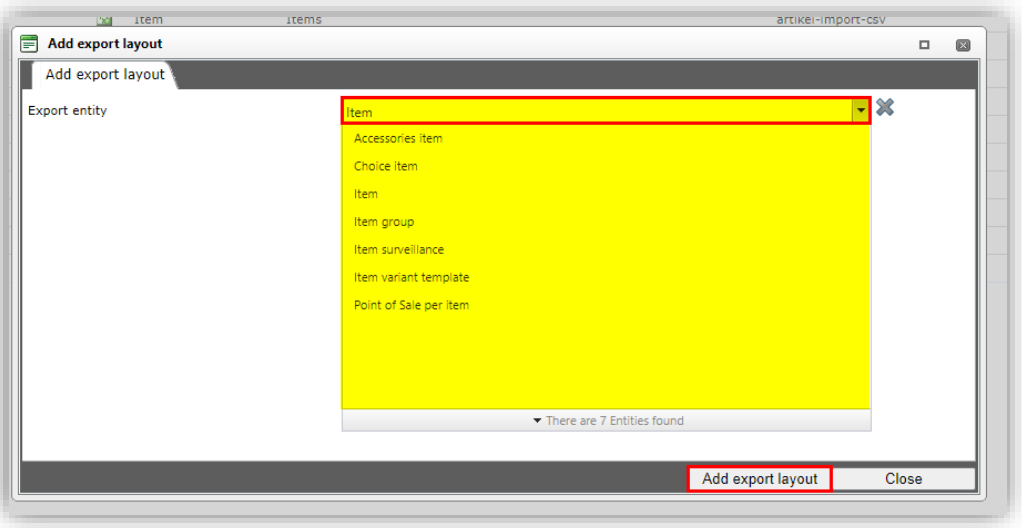
To add an export layout:

1. Click on *Add export layout*.



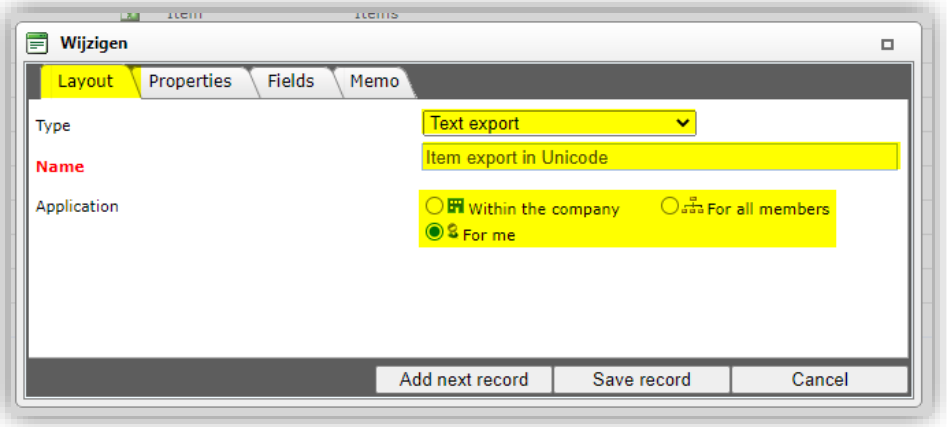
2. In the pop-up window, select the ***Entity***[15] for which you want to define the layout, for instance Item:

[15] An Entity is a data object in COS, for instance Product, Item, Assortment, Attachment, Price, etc.



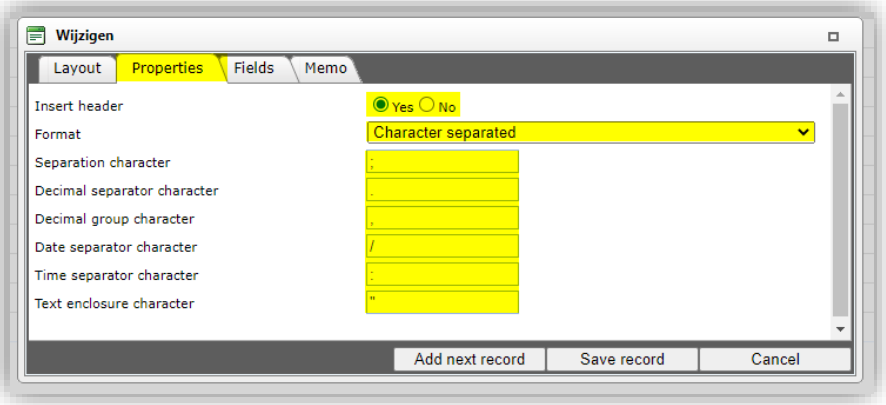
3. Click on *Add export layout*.
4. In the next pop-up window, fill out the options for the layout on the different tabs:

Layout tab:



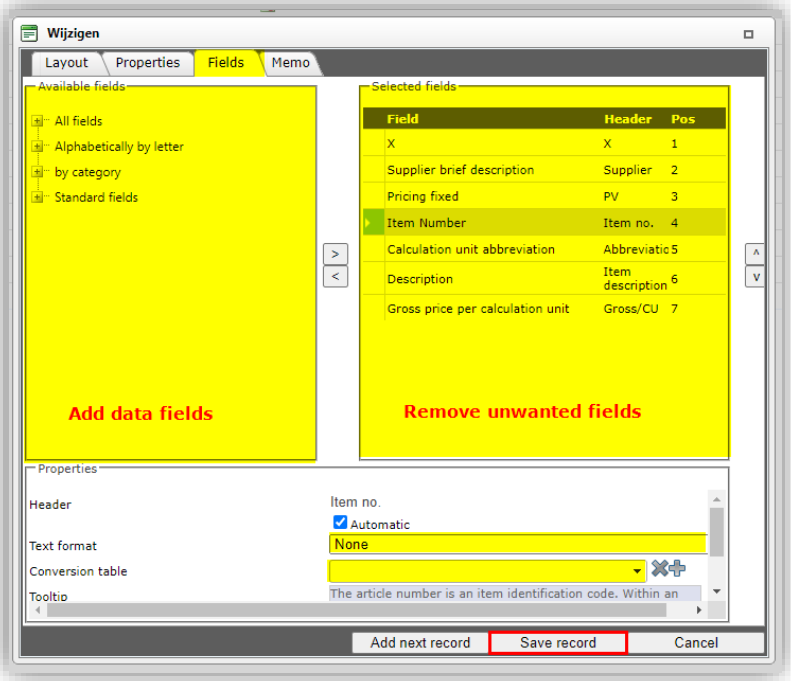
a. **Type**: Choose the Export type:
   i. **Excel export**: Exports data in Microsoft XSLX-format.
   ii. **Text export**: Exports data in a Text format, such as CSV or Unicode.
b. **Name**: Type a name for the Export layout
c. **Application**: Choose whether the layout should be visible for only yourself (*For me*), for all users of this environment (*Within the company*), or for all members/users of all (layered) environments (*For all members*)

Properties tab:



a. **Insert header**: Set to Yes if the export should contain a header line with data field labels
b. **Format**: Selected either a *Fixed width* or *Character separated format*
c. **Separation character**: Set the data field separation character. For CSV this is a semi-colon `;` and for Unicode use the code: TAB.
d. **Decimal separator character**: Set the decimal separator character. The default setting for European CSV is a *comma*.
e. **Decimal group character**: Set the date separator character. The default setting for European CSV is a *point*.
f. **Date separator character**: Set the date separator character. The default setting for European CSV is a *hyphen*.
g. **Time separator character**: Set the time separator character. The default setting for European CSV is *colon*.
h. **Text enclosure character**: Set the decimal separator character. The default setting for European CSV are *double quotes*.

Fields tab:



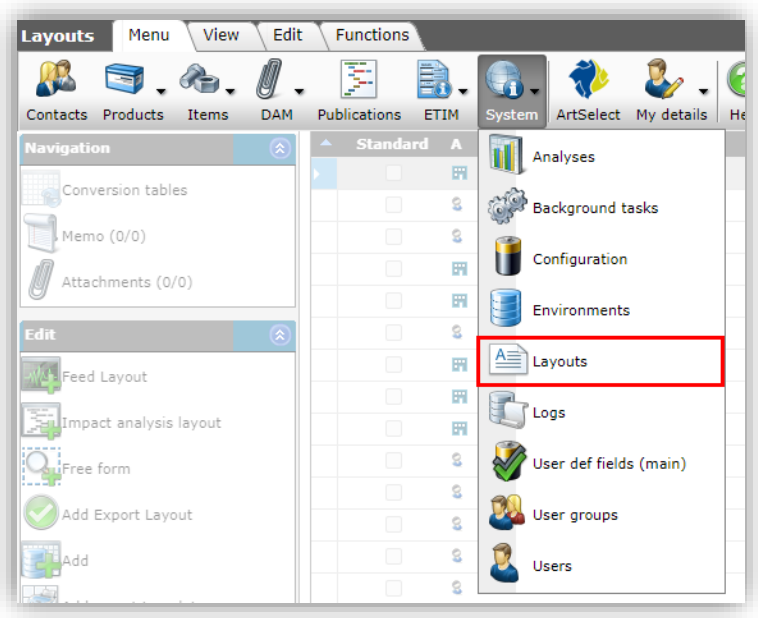
a. **Available fields**: Add data fields to be exported from the list of available fields
b. **Selected fields**: Remove unwanted fields from the list of available fields. Note: The position number (Pos) indicates at which position (Excel data column) the value of the field will be exported.
c. **Properties**: Optionally, set options for selected data fields.

5. Click on *Save record* to save the layout.

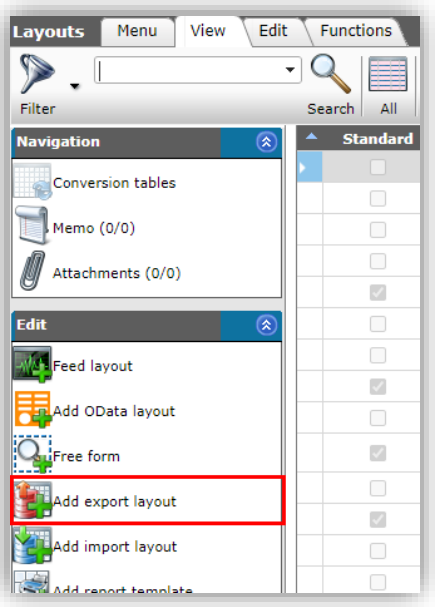
4.1.1 Add custom text-based export layout

To create a custom text-based (CSV, Unicode) export layout:

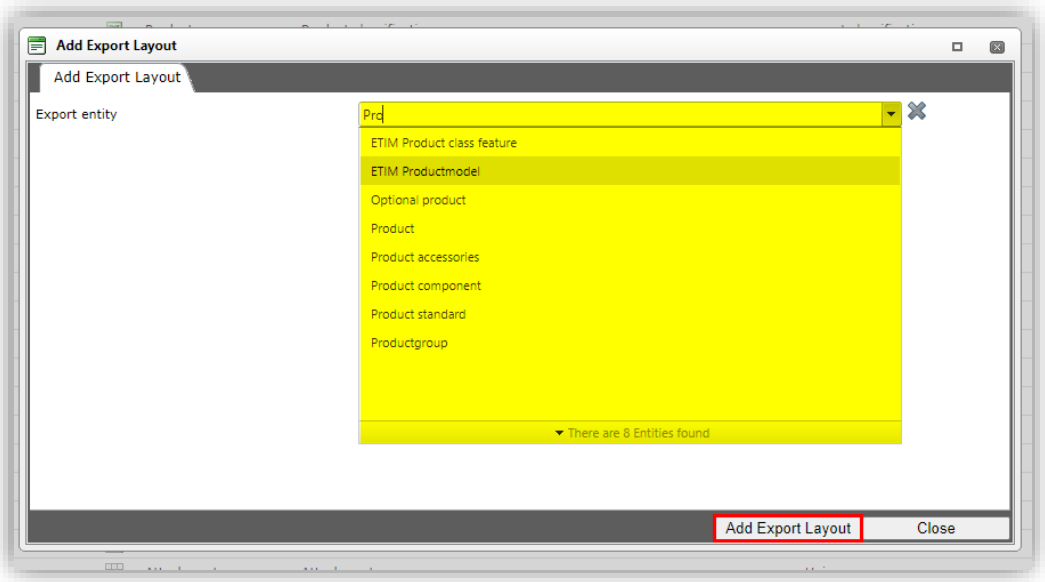
1. Through the Menu go *to System > Layouts*:



2. Next, under Edit, click on *Add export layout*:

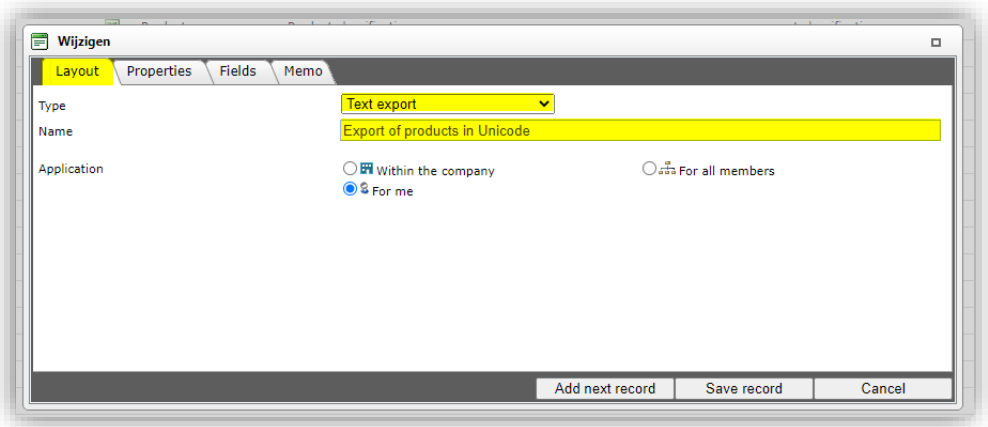


3. In the pop-up window:



a. **Export entity**: Select the Entity for which the export layout needs to be created. Type the first few letters to searching for the correct entity. Note: If the language of your COS database is set to English, you will need to search for English entity names; for instance, `Item` instead of `Artikel`.

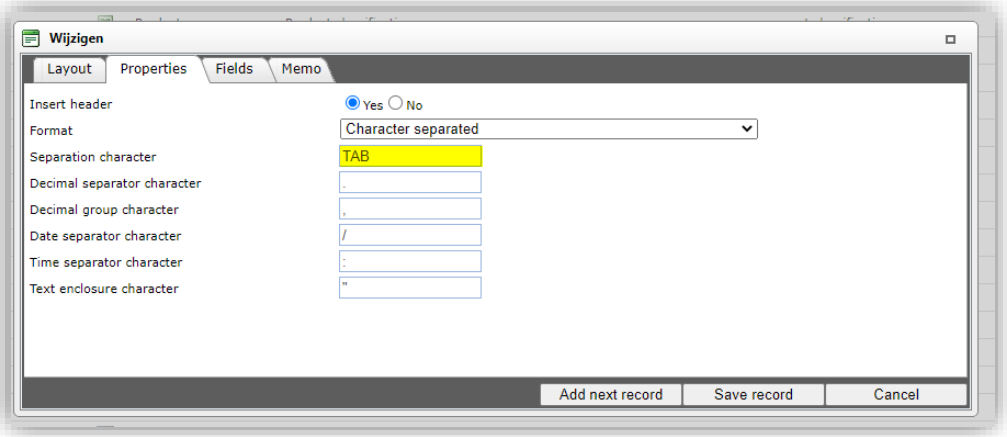
4. Click on *Add Export Layout* to go to the next dialog window:



Layout tab

a. **Type**: Select the Text export type.
b. **Name**: Type a name for the layout.
c. **Application**: Decide whether the layout is for your own use only or for all users within your company which have access to your application.

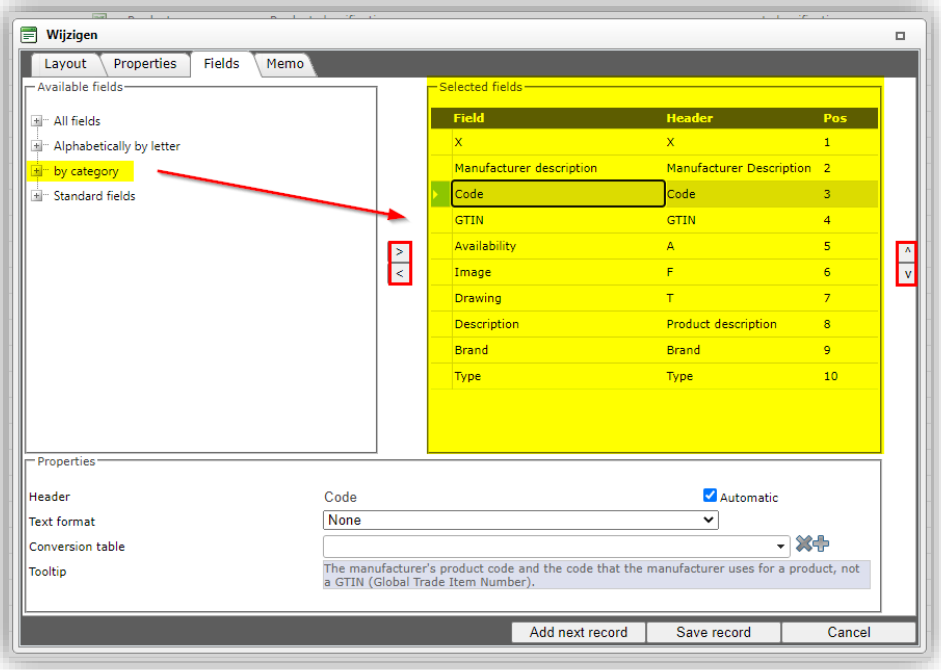
Properties tab



a. **Insert header**: Set to *Yes* to add a header line containing data field labels to your export.
b. **Format**: Select *Character-separated* for CSV or Unicode files, or *Fixed Width* for a fixed-width format.
c. **Separation character**: Use a semi-colon for CSV or the code TAB for Unicode.
d. Optionally, set the Decimal, Date, Time, and Text enclosure characters.

Fields tab

a. Select data fields from the *Available fields* and add them to the *Selected fields*:



b. **Properties** (optional): Optionally, edit any properties for the data field, such as Header label, Text format, etc.

Note: Properties may differ depending upon the type of data field.

c. **Conversion table** (optional): Optionally, add a conversion table to convert the values of a field. See also paragraph 3.2.2 MULTI-PASS import

A multi-pass import allows for multiple, consecutive imports of data with different import layouts. This method can be used for:

- Import of interdependent data sources, such as:
  - Product and Item
  - Item and multiple Attachments
  - Item with Current and Future Price
- Import of column-based data sources, such as Items with different Packaging data, ordered in consecutive Excel columns.

One Periodic Task instead of multiple, interdependent periodic tasks, for example, for importing product and item data.

Important: A maximum of ***5 consecutive imports*** can be handled this way.

Note: Multi-pass imports can ***make use*** of Excel or CSV data files, provided the correct type of import layout is selected.

For detailed instructions, see the Manual Periodic Tasks, which is available on the Compano Help website.

Multi-pass imports need to be prepared and tested:

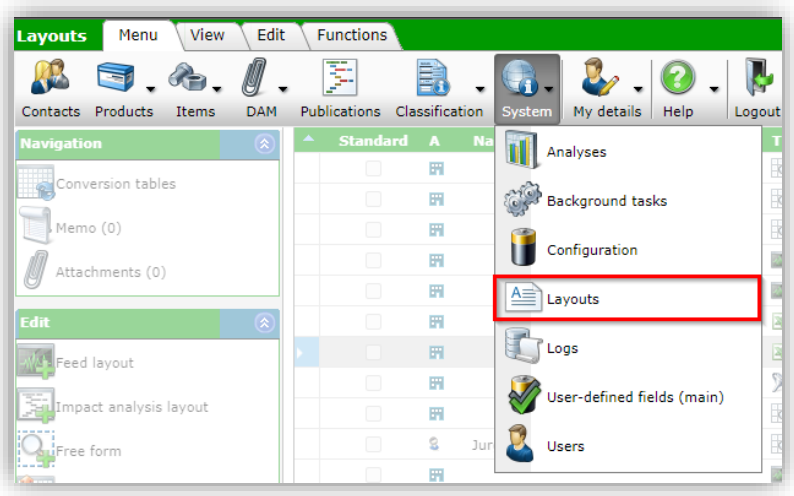
First, set up and test the import of the main entity; for instance Product data.
Next, set up and test the import of the subsequent data/entity; for instance Item data.
Optionally, repeat this step for the remainder of the subsequent data/entity imports.
Create the multi-pass import by linking the main and subsequent import(s).

Example
To set-up a multi-pass import, for example to import Product and related Item information:

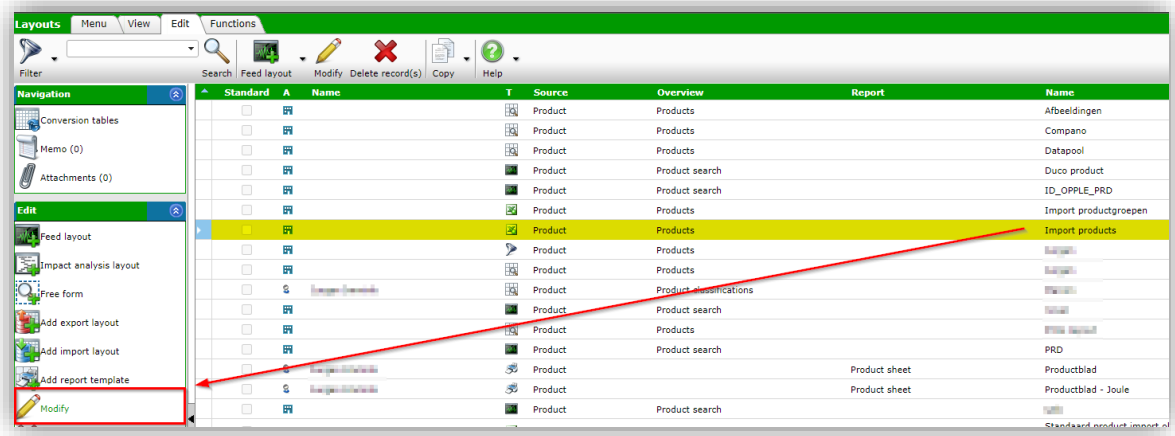
First, prepare the import layout for the main entity, which is Product data in this example.

Note: Detailed information on how *to add* an import layout, can be found in paragraph **4.2 ADD IMPORT LAYOUT**.

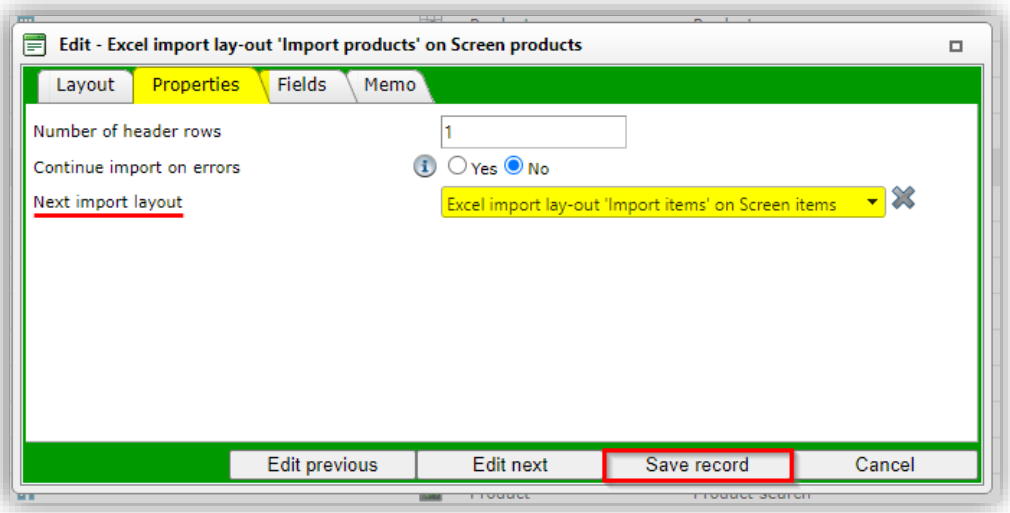
Use the import layout and your data file to test the import; see **PARAGRAPH 3.2 CUSTOM IMPORT** for detailed instructions.
Next, prepare the import layout for the ***subsequent data/entity***, which is Item data in this example.
Use the import layout and your data file to test the import; see **PARAGRAPH 3.2 CUSTOM IMPORT** for detailed instructions.
Now, go to System > Layouts:



Select the import layout of your main ***entity*** and, under Edit, click on *Modify*.



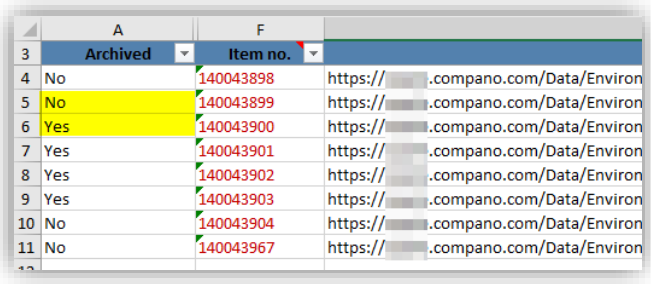
- In the pop-up window, on the Properties tab:



-
- Next import layout: Select the import lay-out for the subsequent data/entity import.
- Save the record.

d. Archive / Restore records

e. The Archive Status of a record can also be changed using an import file. The import file should contain a data column labelled *Archived*, where the archive status can either be set to Yes (record is archived) or No (record is not archived):



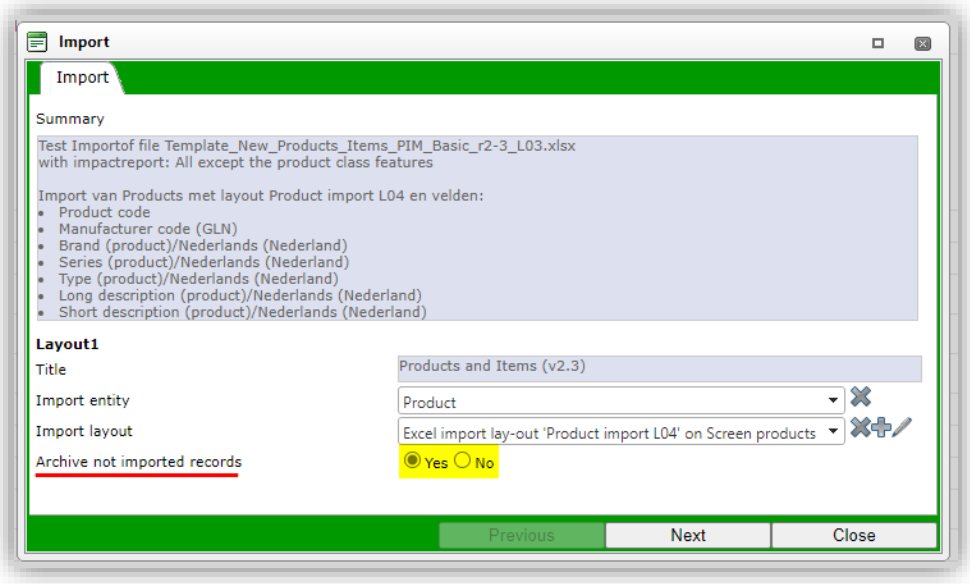
	A	F	
3	Archived	Item no.	
4	No	140043898	https://[redacted].compano.com/Data/Environ
5	No	140043899	https://[redacted].compano.com/Data/Environ
6	Yes	140043900	https://[redacted].compano.com/Data/Environ
7	Yes	140043901	https://[redacted].compano.com/Data/Environ
8	Yes	140043902	https://[redacted].compano.com/Data/Environ
9	Yes	140043903	https://[redacted].compano.com/Data/Environ
10	No	140043904	https://[redacted].compano.com/Data/Environ
11	No	140043967	https://[redacted].compano.com/Data/Environ

Archive products/items on import
For the import of Products and Items only, an alternative archiving option is available:

In the Import dialog the option Archive not imported records can be set to Yes. Any Products (or Items) which are present in the COS database, but are ***no longer offered*** as a record in the Import file (Excel or text-based), will then be archived.

Important: The **Archive not imported records** option will only be available when an Import layout is selected that contains the key data fields for the entities Product or Item.

Note: Not imported records will only be archived when the import report contains no ***errors*** (!)



Note: Archiving of products**/items using the** Archive not imported records will also function when the layout is used for a Periodic Import Task.

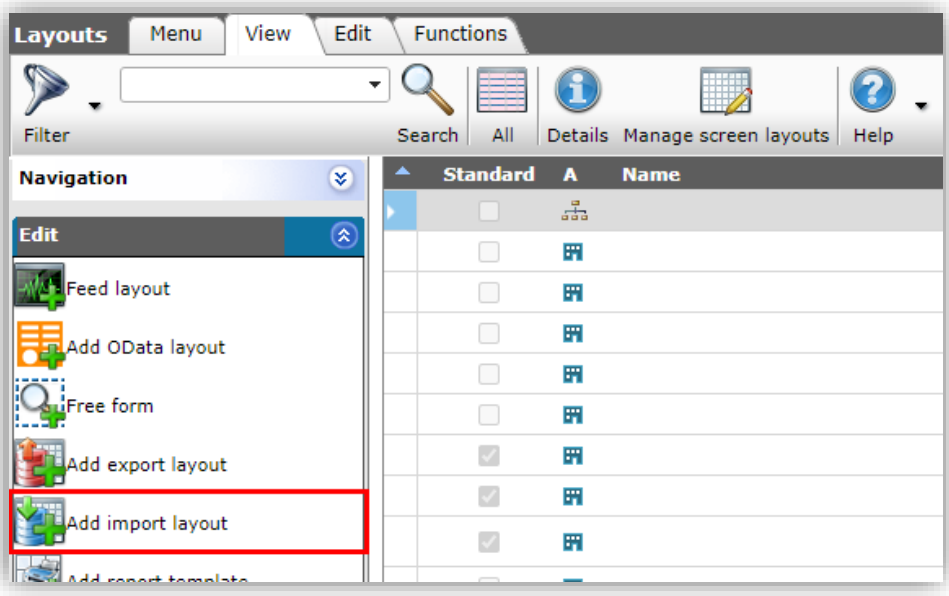
f. Conversion .

5. Click on *Save record* to save the layout.

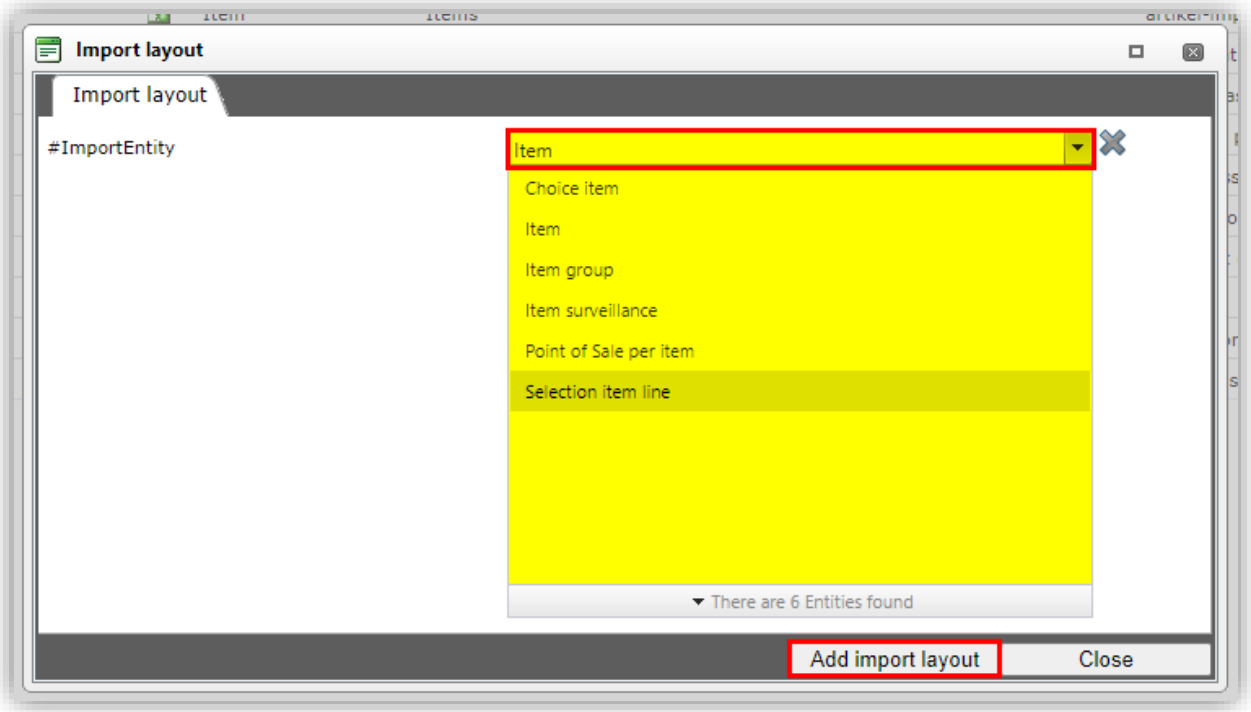
4.2 Add import layout

To add an import layout:

1. Click on *+ Import layout*.



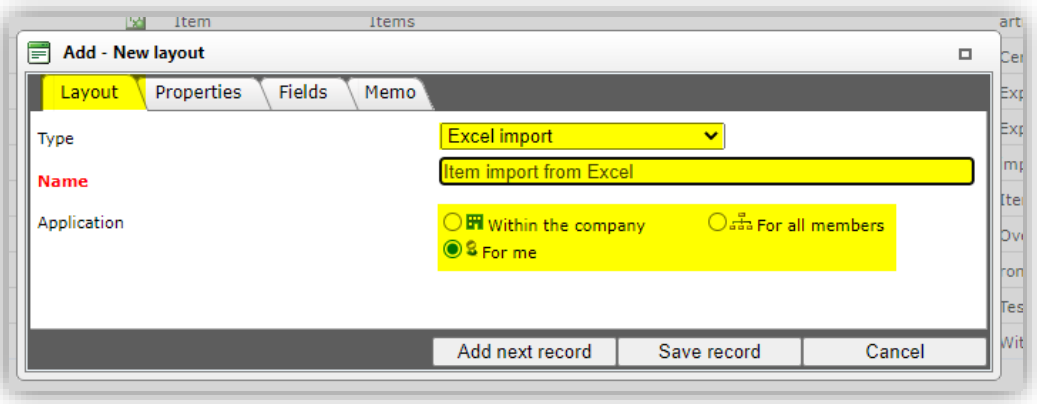
2. In the pop-up window, select the ***Entity***[16] for which you want to define the layout, for instance Item:



3. Click on *Add import layout*.
4. In the next pop-up window, fill out the options for the layout on the different tabs:

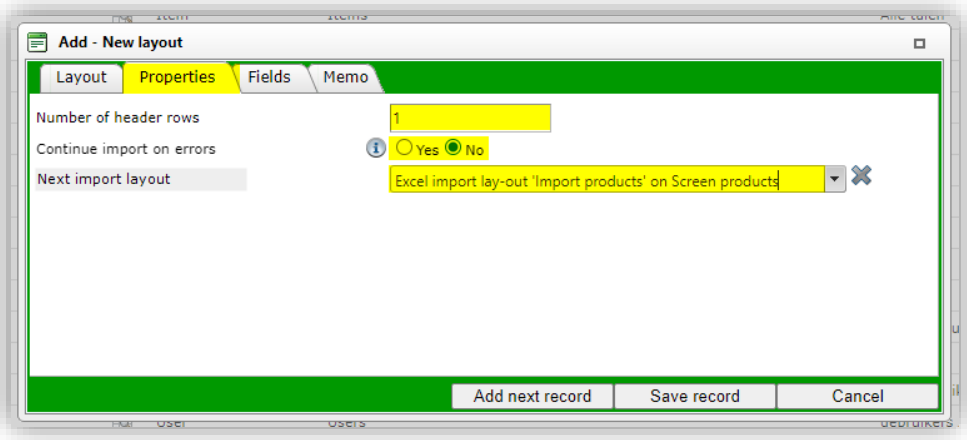
Layout tab:

[16] An Entity is a data object in COS, for instance Product, Item, Assortment, Attachment, Price, etc.



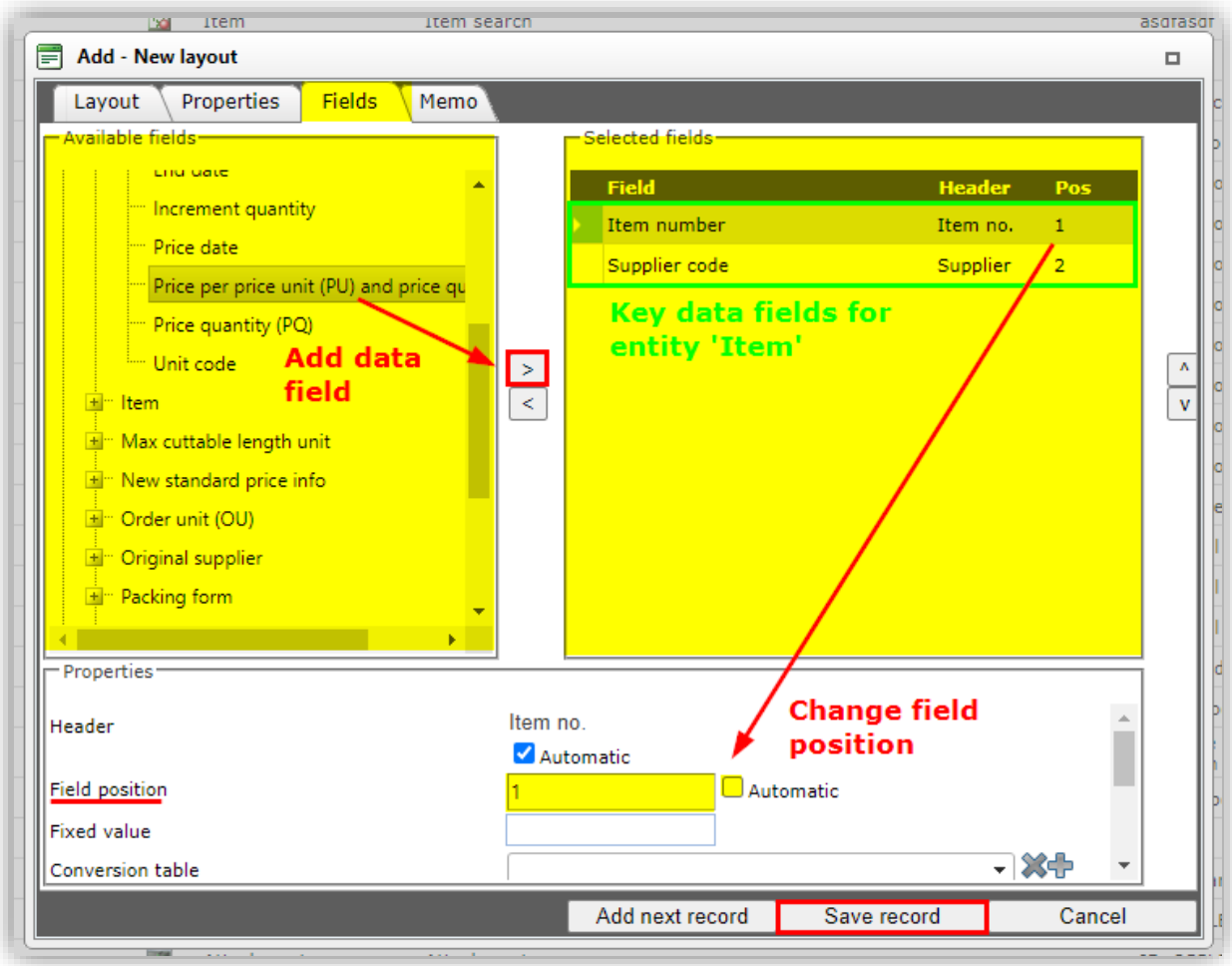
a. **Type**: Choose the Import type:
   i. **Excel import**: Imports data from Microsoft XLS-format.
   ii. **Text import**: Imports data from a Text format, such as CSV or Unicode.
b. **Name**: Type a name for the Import layout
c. **Application**: Choose whether the layout should be visible for only yourself (*For me*), for all users of this environment (*Within the company*), or for all members/users of all (layered) environments (*For all members*). Note: this last option is only available for applications with multiple environments.

Properties tab:



a. **Number of header rows**: Set the number of *header rows* contained in your import file. Note: These rows will be skipped on import.
b. **Continue on errors**: Set to *Yes* if the import should continue on errors in your data file. Errors will ***not*** be imported. Note: In combination with a test run import, this option will report ***all*** errors in a data file.
c. **Next import layout** (optional): When opting for a multi-pass import, select the next import layout to be used with the import file. For more information, please see paragraph 3.2.2 MULTI-PASS IMPORT.

Fields tab:



a. **Available fields**: This column lists all data fields which are available in your application. Use the > button to add data fields for import to the *Selected fields* column.

b. **Selected fields**: This column lists all data fields which will be used for import.

Field position (Pos): This number indicates from which Excel data column the value of the field will be imported. Position numbers can be changed under Properties, by removing the check mark next to Automatic and typing a new number. Note: Position 1 corresponds to column A, position 2 to column B, and so on.

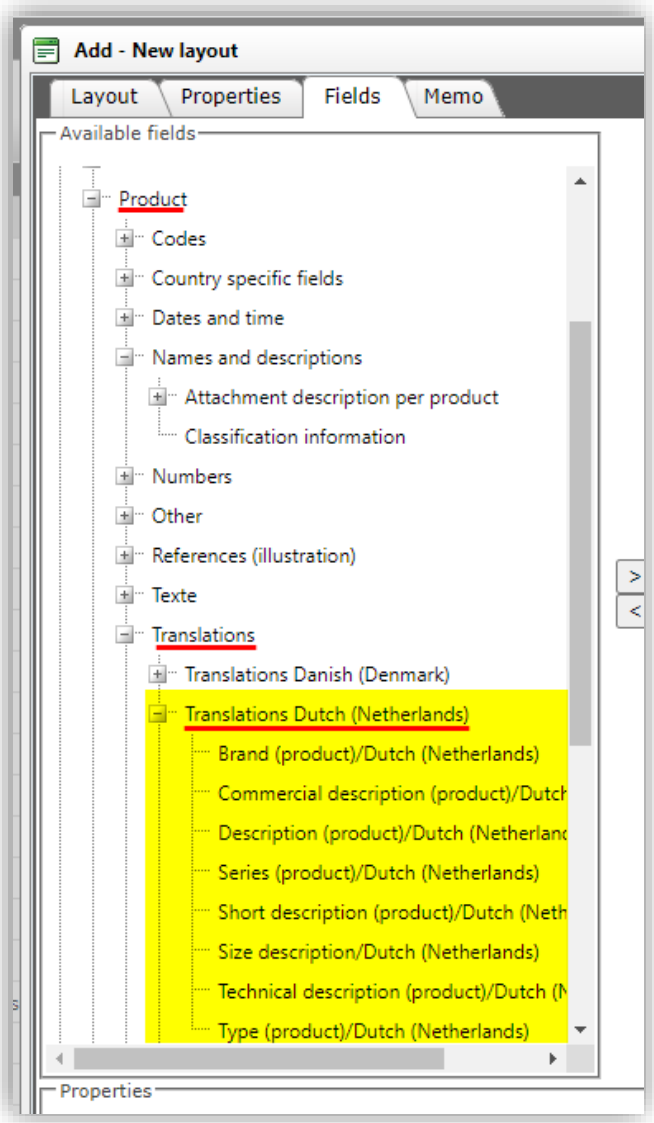
Key data fields: When adding a new import layout, the key data fields for the selected entity will already be present in the *Selected fields* column. As these fields are ***mandatory***, they should not be removed! Also see APPENDIX A: KEY DATA FIELDS PER ENTITY.

c. **Properties**: Optionally, set import options per selected data field.

5. Click on *Save record* to save the layout.

4.2.1 Adding translatable fields (multi-language license only)

In a multilingual environment, (translatable) text fields in the field selector can ***only*** be added from the *Product >Translations* category[17]. From this category, you can select any of the languages available in your application and select the language-specific text fields that you need for your import layout:

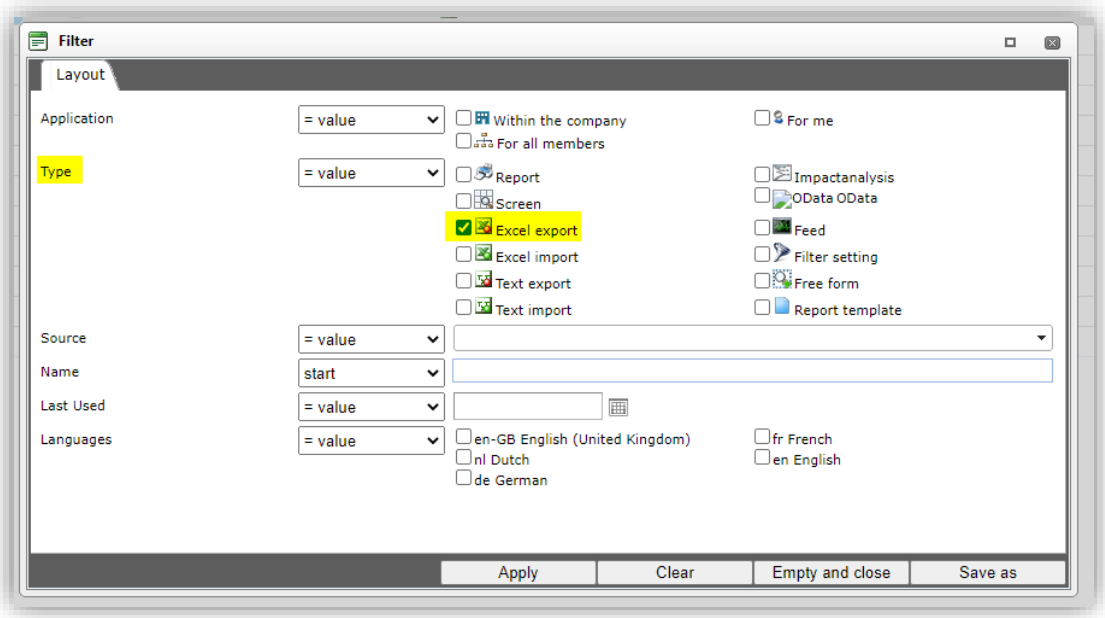


4.3 Finding layouts

The Layouts overview lists all kinds of layouts, such as import, export, feed, import analysis, screen, report, etc. Use the Filter to easily single out a list of of only one type(s) of layout.

For instance, to view all available *Excel export layouts,* set the Filter to:

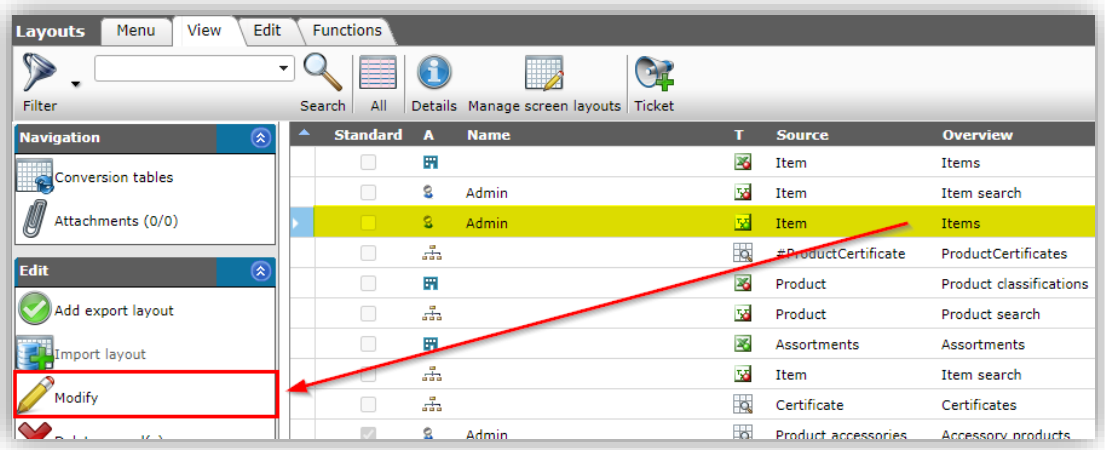
[17] Note: In the field selector, these fields have been removed from the category *Names and Descriptions*.



4.4 Modifying layouts

Existing layouts can be modified, using the *Modify* function:

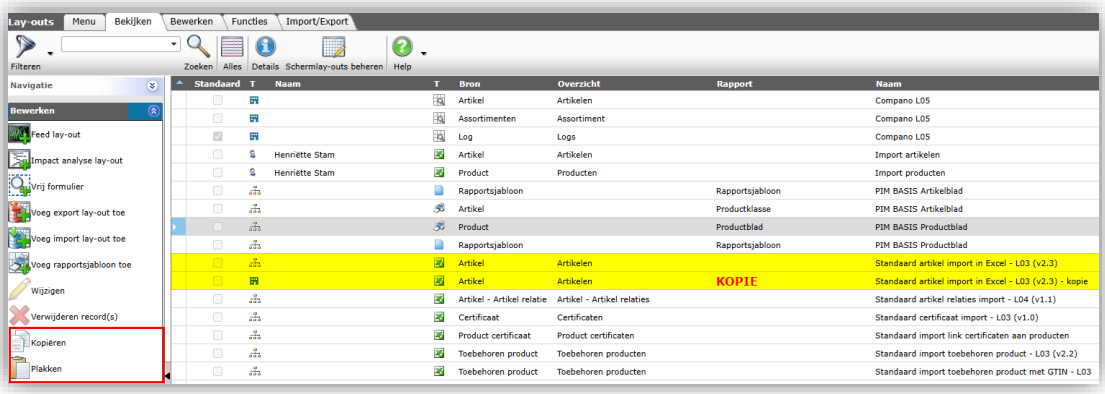
1. Select the layout to be modified in the Layout overview
2. Under Edit, click on *Modify:*



3. Adapt the layout and click on *Save record*.

4.5 Copying layouts

It is possible to copy shared layout with the *Copy/Paste* functions and then edit this local copy:

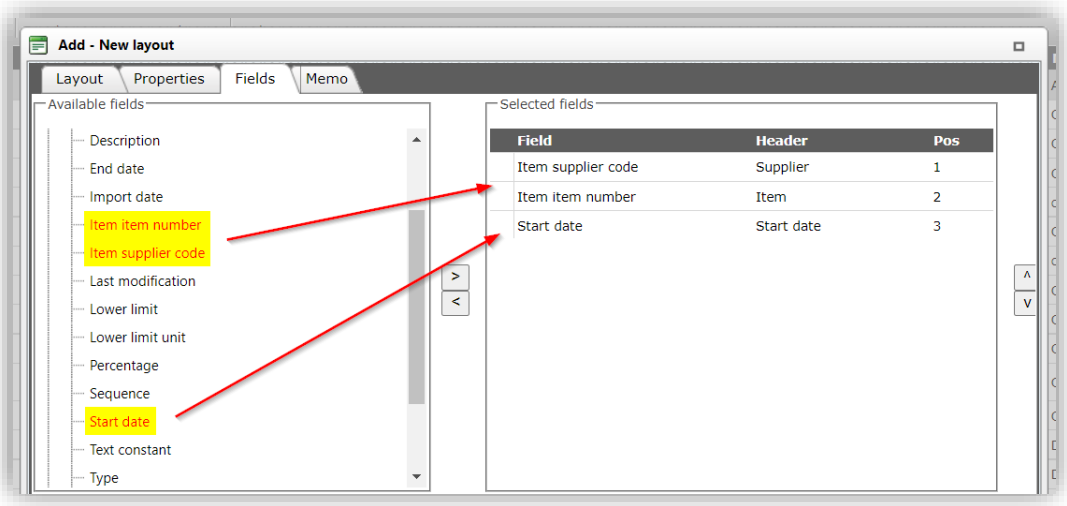

Lay-outs
Menu
Bekijken
Bewerken
Functies
Import/Export
Filteren
Zoeken
Alles
Details
Schermlay-outs beheren
Help
Navigatie
Bewerken
Feed lay-out
Impact analyse lay-out
Vrij formulier
Voeg export lay-out toe
Voeg import lay-out toe
Voeg rapportsjabloon toe
Wijzigen
Verwijderen record(s)
Kopiëren
Plakken
Standaard
T
Naam
T
Bron
Overzicht
Rapport
Naam
Artikel
Artikelen
Compano L05
Assortimenten
Assortiment
Compano L05
Log
Logs
Compano L05
Henriëtte Stam
Artikel
Artikelen
Import artikelen
Henriëtte Stam
Product
Producten
Import producten
Rapportsjabloon
Rapportsjabloon
PIM BASIS Artikelblad
Artikel
Productklasse
PIM BASIS Artikelblad
Product
Productblad
PIM BASIS Productblad
Rapportsjabloon
Rapportsjabloon
PIM BASIS Productblad
Artikel
Artikelen
Standaard artikel import in Excel - L03 (v2.3)
Artikel
Artikelen
KOPIE
Standaard artikel import in Excel - L03 (v2.3) - kopie
Artikel - Artikel relatie
Artikel - Artikel relaties
Standaard artikel relaties import - L04 (v1.1)
Certificaat
Certificaten
Standaard certificaat import - L03 (v1.0)
Product certificaat
Product certificaten
Standaard import link certificaten aan producten
Toebehoren product
Toebehoren producten
Standaard import toebehoren product - L03 (v2.2)
Toebehoren product
Toebehoren producten
Standaard import toebehoren product met GTIN - L03

5 Appendix A: Key data fields per Entity

This appendix list the ***key data fields*** for the most commonly used Entities, as well as any standard Excel import templates and corresponding import layouts which were premade by Compano.

Note: Standard Excel import templates are available on the Compano Help website.

When creating layouts, any mandatory key data field are marked in **red font** in the field selector. Also, these field are added to the Selected fields by default:



When migrating from a previous version of Compano software, any existing import layouts might need adjusting, as mandatory **key data fields** *could be missing.*

5.1 Product

Mandatory fields	Field selector category	Remark
Manufacturer code (gln)	Manufacturer	-
Code	Product > Codes	-

A ready-to-use template is available for importing (new) Products: *Template New Products And Items (DICO/SALES005) - (XLSX)*. This template is available in 2 variants:

- **International**: `Template_New_Products_Items_PIM_International_r1-1_L04.xlsx`
- **Dutch**: `Template_Nieuwe_Producten_Artikelen_PIM_Basis_r2-3_L03.xlsx`

These Excel files can be imported using the corresponding standard import layouts:

- `Standard product import in Excel INT NL - L04 (v1.1)`
- `Standaard product import in Excel - L03 (v2.3)`

For more information, see the *Manual New Products, Articles, and Price Updates*, available on the Compano Help-website.

5.2 Item

Mandatory fields	Field selector category	Remark
Supplier code	Supplier	-
Item number	Item > Codes	-

A ready-to-use template is available for importing (new) Items: *Template New Products And Items (DICO/SALES005) - (XLSX)*. This template is available in 2 variants:

- **International**: `Template_New_Products_Items_PIM_International_r1-1_L04.xlsx`
- **Dutch**: `Template_Nieuwe_Producten_Artikelen_PIM_Basis_r2-3_L03.xlsx`

These Excel files can be imported using the corresponding standard import layouts:

- `Standard artikel import in Excel INT NL - L04 (v1.1)`
- `Standaard artikel import in Excel - L03 (v2.3)`

For more information, see the *Manual New Products, Items, and Price Updates*, available on the Compano Help-website.

5.3 Price (update) information

Mandatory fields	Field selector category	Remark
Item supplier code	Item	-
Item number	Item	-
Sequence	Price information > Numbers	Value can be empty
Price date	Price information > Dates and time	-

For importing accessories, a ready-to-use template is available on the Compano Help website:

- `Template_Prijsupdates_PIM_Basis_r2-2_L03.xlsx`

Both Excel files can be imported using the standard import layout:

- `Standaard prijsupdates in Excel - L03 (v2.2)`

For more information, see the *New Products, Articles, and Price Updates Guide*, available on the Compano Help website.

5.4 Certificate

Mandatory fields	Field selector category	Remark
Type	Certificate > Other	Value cannot be empty
Number	Certificate > Codes	Value can be empty
Sub number	Certificate > Codes	Value can be empty
Issuer	Certificate > Names and descriptions	Value cannot be empty
Start date	Certificates > Dates and time	In the Excel import file, the cells containing the ***Start dates*** need to be of cell type *Date*.

Two templates are available for the import of Certificates:

Adding new certificates: `Template_Import_Certificaten_r1-0_L04.xlsx`
Linking certificates to products: `Template_Link_Certificaten_aan_Producten_r1-0_L04.xlsx`

These templates can be imported with:

- `Standaard certificaat import - L03 (v1.0)`
- `Standaard import product certificaat link - L04 (v1.0)`

For more information, see the *Attachments and Certificates Manual*, available on the Compano Help website.

5.5 Product –Product relations

Mandatory fields	Field selector category	Remark
Manufacturer 1 (parent)	Product relations > References	
Manufacturer 2 (child)	Product relations > References	
Product code 1 (parent)	Product relations > Codes	
Product code 2 (child)	Product relations > Codes	
Sequence number	Product relations > Numbers	
Type	Product relations > Other	
Valid from	Product relations > Time of day	

A ready-to-use template is available for importing product relationships:

- `Template_import_product_relaties_PIM_Basis_r1-1_L04.xlsx`

This template can be imported with:

- `Standaard product relaties import - L04 (v1.1)`

Note: This template is ***not*** suitable for importing *optional products* or *optional items*.

5.6 Item –Item relations

Mandatory fields	Field selector category	Remark
Supplier 1 (parent)	Item relations > References	
Supplier 2 (child)	Item relations > References	
Item code 1 (parent)	Item relations > Codes	
Item code 2 (child)	Item relations > Codes	
Sequence number	Item relations > Numbers	
Type	Item relations > Other	
Valid from	Item relations > Time of day	

A ready-to-use template is available for importing product relationships:

- `Template_import_artikel_relaties_PIM_Basis_r1-1_L04.xlsx`

This template can be imported with:

- `Standaard artikel relaties import - L04 (v1.1)`

Note: This template is ***not*** suitable for importing *optional products* or *optional items*.

5.7 Surcharges

Mandatory fields	Field selector category	Remark
Item supplier code	Item	-
Item item number	Item	-
Start date	Surcharge > Dates and time	-
Type	Surcharge > Other	Not mandatory, but strongly recommended
Optional fields	**Field selector category**	**Remark**
Lower limit*		Need to be added to import layout as a '0' field*
Increment unit code*		Need to be added to import layout as a '0' field*

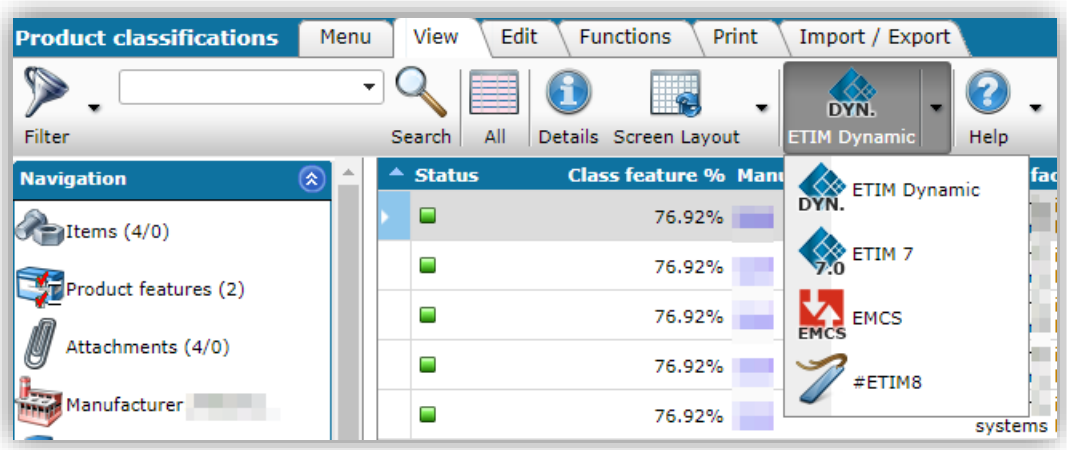
*) These fields need not be present in your import file, however, they ***do*** need to be present in your import layout (possibly as an '0' field).

5.8 User-defined fields

Mandatory fields	Field selector category	Remark
Name	Standard fields	-
Type	Standard fields	-
Entity	User-defined fields > Names and descriptions	-

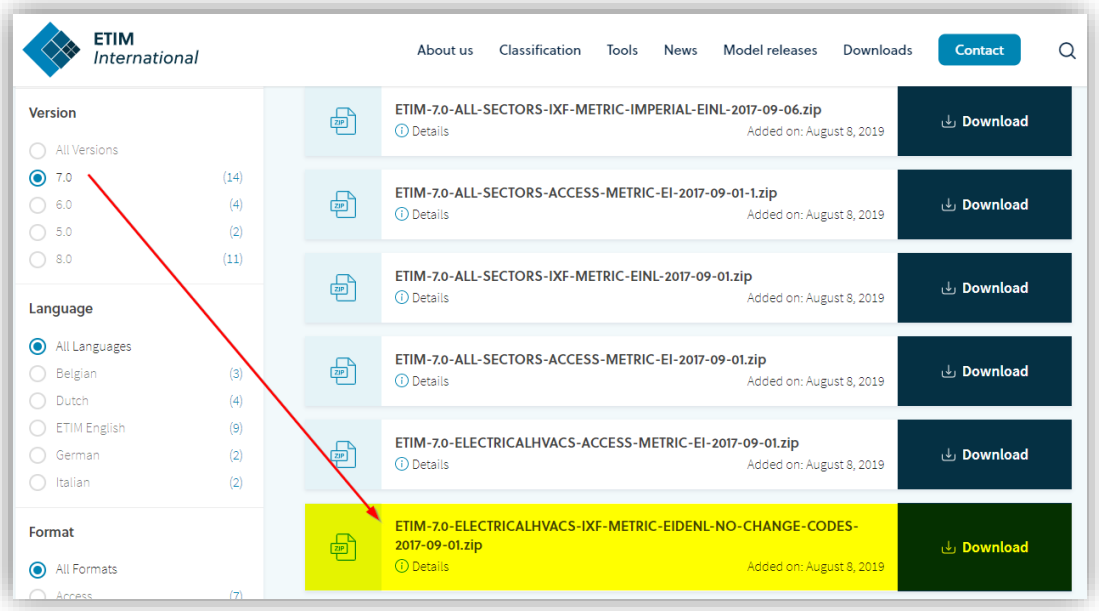
6 Appendix B: ETIM classification version import

By default, Compano PIM license offers classification of products using the ***ETIM Dynamic standard***. Should you so desire, multi-classification of products—using different version of the ETIM standard—is available as an add-on license. Please contact sales@compano.com for more information and prices.



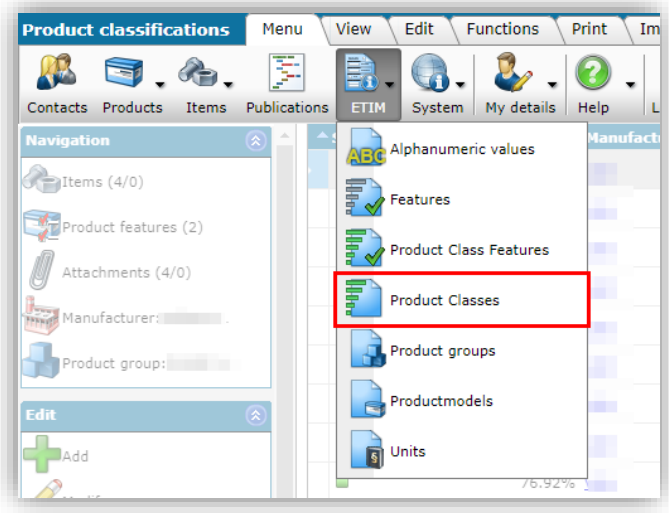
To be able to classify in a ***different version ETIM***, you will need to perform a one-off import of the classification system:

1. Go to https://www.etim-international.com/downloads/
2. Choose the version you need in the left-hand menu, for example `ETIM7`
3. Download the corresponding ***IXF-file***[18], or example `ETIM-7.0-ELECTRICALHVACS-IXF-METRIC-EIDENL-NO-CHANGE-CODES-2017-09-01.zip` (ETIM International DE/NL)

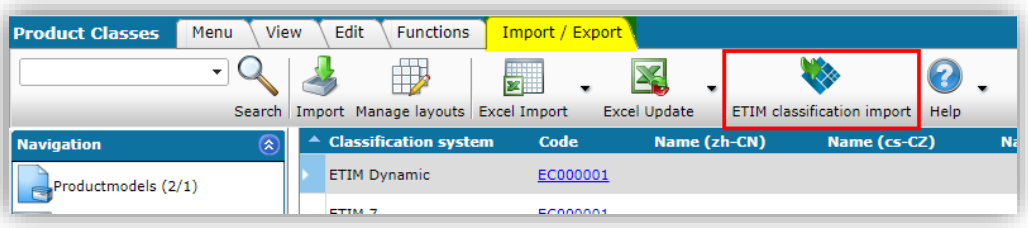


[18] From the ETIM International versions list, choose the METRIC system that corresponds best with your needs. In case need to fill-out both metric and imperial values, you will need to combine an ETIM-metric IXF-file with user-defined fields and a proper set up of mapping UDF's to features. For more information, please check your Compano consultant.

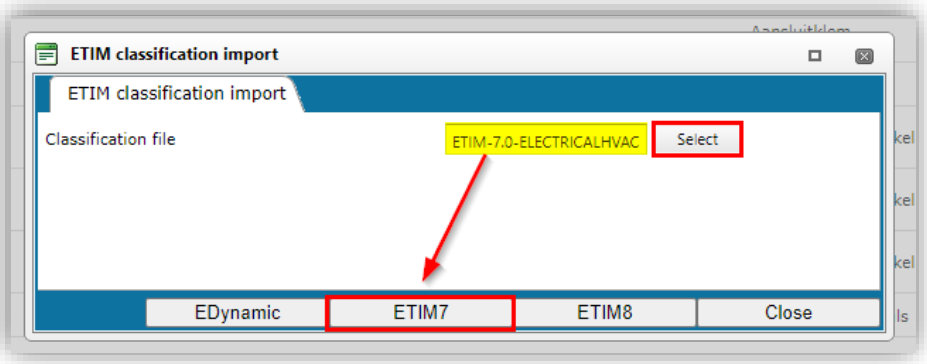
4. In the Compano PIM environment, go to *Menu > ETIM > Product Classes:*



5. Go to the *Import/Export* tab and click on *ETIM classification import*.



6. In the pop-up window:



   a. **Select**: Select the ETIM IXF that you downloaded.
   b. **ETIM-##**: Click on the corresponding ETIM-button to import the IXF-file. In this example: `ETIM7`.

7 Appendix C: AutoImport/AutoCheck

For industry standard data files, a different import method can be used: *AutoImport/Autocheck*. In combination with FTPS:

Important: The data must be offered in one of the following industry formats: *PAB, INSBOU, DICO/SALES, BMEcat* or *DQR (8 en 9).*

To setup AutoImport/AutoCheck:

1. Upload your data file to the Compano FTPS server and place it in either the ***AutoCheck*** or ***AutoImport*** folder:
    i. **AutoCheck**: Data file is compared with current dataset on Artikelbeheer.nl; a report is drawn up and sent. Note: After approval, the file must ALWAYS be manually placed in the *AutoImport* folder for actual processing, unless the parameters.xml of the data file indicate the following:
    `<PublishMethod>AutoAcceptStagingData</PublishMethod>`

This is only possible for the PAB, INSBOU and DICO/SALES data file types. A parameters.xml can be added to the BMEcat zip file containing the following code:

```
<?xml version="1.0" encoding="utf-8"?><UCProcessParameters
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns="http://www.2ba.nl"><<PublishMethod>AutoAcceptStagingData</Pub
lishMethod><ReportAllCheckDetailMessages>false</ReportAllCheckDetail
Messages><SendReportToEmail>mijn-
email@adres.com</SendReportToEmail><ReportLanguage
/></UCProcessParameters>
```

    ii. **AutoImport**: Data file is read and processed. A report is sent to the e-mail address indicated in the parameters.xml of the data file.

2. The data processing via FTPS is automated as a nightly job.