



CrownPeak
WEB EXPERIENCE MANAGEMENT

FTP Imports Playbook

Version 0.91

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Document History

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FTP Imports Overview

In cases where it is not practical to create each page individually and where existing data can be obtained in a structured XML or comma-delimited CSV format, CrownPeak CMS offers FTP Imports to transfer content or data into the CMS. The CMS can import ASCII data files (TXT, XML, CSV, etc.) and parsing them for data.

FTP Imports Benefits

- Ability to poll the content or data into the CMS automatically
- Schedule: A certain number of times per day (daily, every six hours, every hour, every 30 mins, every 15 mins, or every 5 mins)
- Easier to import multiple files and handle large jobs

FTP Imports

FTP Imports can be configured to support many different processes. The first steps that need to be decided is what content/data will be imported into the CMS and how content/data will be used in the CMS. Before starting the configuration, it is beneficial to solidify the scope of the configuration.

What content will be imported into the CMS?

- Structured XML
- Comma/Tab/Pipe delimited CSV
- Plain Text
- Others

How content will be used in the CMS?

- Pages
- Configurations
- Data
- Others

Schedule? Automatic or Manual? How often it will trigger an import?

- Manual
- Automatic
 - Every Six hours
 - Every hour
 - Every 30 minutes
 - Every 15 minutes
 - Every 5 minutes

Configuring FTP Imports

Note: As of June 2014, Import Connectors can only be configured in the classic UI.

Once the Business Process is understood, FTP Imports will be configured in the following way:

Folder

Create a folder where the file generated documents are stored

Template

- Create a new template in **/System/Templates/** folder.
- Add **ftp_import.aspx** file. (Template must include an ftp_import.aspx template file which will execute when the import is successful.)
- This template will read/import the files from the remote FTP server and convert the content/data to the assets (page, configuration, or data) within the CMS. (Tips: Build the import code in CMS library methods and simply drop the method in ftp_import.aspx. Move to the next steps after confirming the code using a test asset)

Model

- Create a model asset in **/System/Model/** folder
- Select the template above
- Set access properties to inherit
- Set appropriate workflow

Import Connector

Once Template and Model have been created, the Import Connector can be added.

- Create a new FTP Import Connector in System > Configure > Import > FTP.
- **Token:** It will be automatically generated.
- **Label:** Name of the FTP Import Connector
- **Expires On:** Specify the date
- **Daily Max Polls:** Specify maximum files per DAY that can use this token. (Note: 0 value means there's no limit)
- **Maximum Polls:** Specify maximum files that can use this token. (Note: 0 value means there's no limit)
- **Document User:** Specify the owner of the imported files
- **Folder:** Specify the folder where the file generated documents are stored
- **Model:** Specify the model that will be used to create the files within the CMS
- **Hostname:** Specify the remote ftp hostname to connect for importing
- **Username:** Specify the remote ftp username to use for log into the ftp hostname

- **Password:** Specify the remote ftp password to use for lo into the ftp hostname
- **Root Folder:** Specify the remote ftp folder where the files to import are located
- **Connection Mode:** Select the remote ftp connection mode (Passive, Active)
- **Use Secure FTP:** Select the remote ftp security type (Yes, No)
- **On Completion:** Select what should happen once the file(s) have been processed (Delete Remote File, Move To Remove Folder)
- **Frequency:** Select the ftp polling frequency (day, 6 hours, hour, 30 minutes, 15 minutes, 5 minutes)
- **Send Errors:** Specify email address

Edit Ftp Import	
Token	<i>TKIInuxabQn6bzeJ</i>
Total Polls	0
Polls Today	0
Created On	9/10/2014 15:54:56
Label	FTP Import Sample
Expires On	
	Specify maximum files per DAY that can use this token.
Daily Max Polls	0
	Specify maximum files that can use this token.
Maximum Polls	0
	Specify the owner of the imported files.
Document User	Test User
	Specify the folder where the file generated documents are stored.
Folder	/Playbooks/Imports/FTP Import
	Specify the model that will be used to create the files within the CMS.
Model	/System/Models/Playbooks/Imports/FTP Import/Import
	Specify the remote ftp hostname to connect to for importing
Hostname	50.19.210.147
	Specify the remote ftp username to use for login into the ftp hostname
Username	mastertraininginstance-dev
	Specify the remote ftp password to use for login into the ftp hostname
Password
	Specify the remote ftp folder where the files to import are located
Root Folder	/dev/ftp_import
	Specify the remote ftp connection mode
Connection Mode	Passive
	Specify the remote ftp security type
Use Secure FTP (SFTP)	Yes
	Specify what should happen once the file has been processed
On Completion	Delete Remote File
	Remote Folder
	Specify the ftp polling frequency
Frequency	Every 5 minutes
Send Errors	To email address

Auto Generated Token from Import Connector

The Token creates the proper relationships between the remote files and the template.

Verify that if the Token in the template matches an existing FTP Import Connector and part of the remote files name.

Example: Template (ftp_import.aspx)

```
<%
string szToken = "TKlInuxabQn6bzeJ"; //Get this from FTP Import Connector
string szFileName = context.FtpFilename;
bool bTokenExists = context.FtpFilename.Contains(szToken);
if (bTokenExists)
{
    // Code here
}
%>
```

Using FTP Imports

Once the configuration is complete, the import connector will trigger an import within 5-10 minutes. After the first trigger, it will automatically polls the remote FTP/SFTP server a certain number of times based on the configuration.

The remote file needs to have the correct import Token in it. The Token has to be part of the file name in order to be recognized by the CMS.

Filename	Filesize	Filetype	Last modified
..			
ftp_import_test_TKlInuxabQn6bzeJ.txt	659	TXT File	9/10/2014 4:06:00 PM

The import connector automatically triggers an import based on connector configuration (frequency). FTP Import can be triggered manually in [System](#) > [Configure](#) > [Import](#) > [FTP](#).

File	Edit	View	System	Help
Trigger Import				

Ftp Imports (1)						
Polls	Label	Token	User	Folder	Expires	
1	FTP Sample Import	TKlInuxabQn6bzeJ	mastertraininginstance-dev	/Playbooks/Imports/FTP Import		

Select one of the imports, and click 'Processed ftp files' menu to check the processed files.

File Edit **View** System Help

Processed ftp files

Ftp Imports (1)					
Polls	Label	Token	User	Folder	Expires
1	FTP Import Sample	TKlInuxabQn6bzeJ	mastertraininginstance-dev	/Playbooks/Imports/FTP Import	

Processed Files for FTP Import Sample (1)			
Is Error	Date	Filename	Size
FALSE	9/10/2014 16:10:36	/dev/ftp_import/ftp_import_test_TKlInuxabQn6bzeJ.txt	659 bytes

When executed, the template file (ftp_import.aspx) will create one or more assets in the CMS based on template configuration. Asset will be created in '/Playbooks/Imports/FTP Import/' folder. The folder location can be changed in the import connector. File name will be the asset's label by default, but the label can be re-named in the template file.

Navigation: < > 🔍 GoTo New Action Workflow

Playbooks > Imports > FTP Import

Type	Label	Status	Changed By	Changed On	Size	Template	ID
	ftp_import_test_TKlInuxab...	Draft	Test User	9/10/2014 4:10:35 PM		FTP Import	10144