

## How to Setup a File Transfer using File Transfer Protocol (FTP)

Aspect can upload and download store data files for multiple stores in a variety of geographic locations using the Windows FTP routines. Capitalizing on the scripts built into Aspect as well as the FTP executables supplied with Windows as part of the operating system, Aspect can upload data to an FTP Web Site and then download the data from the FTP Web Site in a remote location.

Ideally, the File Transfer is used for multiple restaurants that have restaurants in different geographical locations and want data to be sent to a centralized office for data manipulation and data mining. Note, understanding of FTP and TCP/IP protocols is required prior to attempting to setup the File Transfer.

Prior to setting up Aspect for File Transfer using FTP, you will need to first have the following requirements:

- 1) A FTP server with either an internal IP address or external public ftp web address.
- 2) Username and passwords for the FTP server
- 3) Directories on the FTP server that correspond to each sites Aspect Store code. We recommend that these directories be established on the root of the FTP server.
- 4) Internet access, either in the form of static connection or dial up.
- 5) You will need to copy the entire store1 directory from each store to your corporate office

Once you meet the requirements, follow the steps below:

### REMOTE LOCATIONS – UPLOAD

#### STORE SETTINGS

- 1) Select Settings / Store Settings. You will see your store listed here with potentially a Sample Store.
- 2) Open up the store you want to transfer by right-clicking on the store and choosing edit or simply double clicking on the store itself. A box will appear next.
- 3) In the box, you will see the Store Name and the Store Code. Simply change the store code to either a number or an alpha numeric identifier that is specific only to that store. For instance, "Phil's Café" is the Store Name and "001" is the Store Code. It is this Store Code that will need to be setup on the FTP Server as indicated above.

#### FTP SETTINGS

- 1) Select Settings / FTP Settings. You will see a box where you will need to fill in your FTP information.
- 2) In the drop down menu option, choose your Windows Operating System Version.
- 3) In the first box on the left column, you will need to enter in the name of the dial-up connection if you are using a dial up account to get to the Internet, such as AOL, Netzero, or Earthlink. To determine the name of the dial up connection, go to Dial and Network Connections in your control panel and simply copy the name of the shortcut and place it in the box. The name is case sensitive, for example "Dial Up to AOL." On the other hand, if you are using a static connection to the Internet where you are always connected to the Internet, simply type in the phrase "Internet."
- 4) In the second box on the left column, if you are using a dial up connection, enter in the user name for the dial up connection. If you are using a static connection, no entry is required.
- 5) In the third box on the left column, enter the password for the dial up connection. If you are using a static connection, no entry is required.
- 6) In the first box on the right column, enter the name or IP address of your FTP Server. For instance, <ftp.aspect-software.net> or 216.144.144.2.
- 7) In the second box on the right column, enter the username for the FTP server. The username has to have read and write permissions. To set up permissions, see your hosts FTP documentation or your network administrator.
- 8) In the third box on the right column, enter the password for the FTP server.
- 9) In the final box, simply leave the Aspect Login the same.

#### SCRIPT SETTINGS

- 1) Select Settings / Scripts. A box will appear called Edit Scripts.
- 2) Using the drop down menu in the Name box, choose "Aspect – Send to home office." Once selected, choose "Edit" on the left side of the box and an Export Store Files box will appear. We recommend using the default settings and they are as follows:
  - a. Description – Export and Transfer
  - b. Store to Export – The name of the store listed, not all stores
  - c. Export Profile – All Store Files
  - d. Output file name – [storedir][storecode].fil
  - e. Checkmark in Compress file using Pkzip



- f. Compressed file name – [storedir][storecode].zip
- g. Checkmark in Transfer the output file to an FTP site
- h. FTP Site to use: "Default"
- i. FTP Directory – [storecode]

\*\*If you wish to change these settings, please refer to the naming conventions section of the FAQ for file descriptions

- 3) Once finished, hit OK
- 4) Using the drop down menu in the Name box, choose "Aspect – Back up store files." Once selected, choose "Edit" on the left side of the box and a Backup store files box will appear. We recommend using the default settings and they are as follows:
  - a. Description – Back up files
  - b. Store to back up – The name of the store listed, not all stores
  - c. Backup file name - [storedir][dayabbr].zip
  - d. Backup the last – 90 days
  - e. Uncheck Transfer the backup file to a FTP site
  - f. FTP site to use – Default
  - g. FTP Director – Leave Blank

\*\*If you wish to change these settings, please refer to the naming conventions section of the FAQ for file descriptions

- 5) Once finished, hit OK
- 6) Using the drop down menu in the Name box, choose "Aspect – Compress store files." Once selected, choose "Edit" on the left side of the box and a Compress past data box will appear. We recommend using the default settings and they are as follows:
  - a. Description – Compress files
  - b. Store to back up – The name of the store listed, not all stores
  - c. Compressed file name - [storedir]compress.zip
  - d. Compress files older than – 90 days
  - e. Uncheck Transfer the backup file to a FTP site
  - f. FTP site to use – Default
  - g. FTP Director – Leave Blank

\*\*If you wish to change these settings, please refer to the naming conventions section of the FAQ for file descriptions

- 7) Once finished, hit OK
- 8) Using the drop down menu in the Name box, choose "Aspect – Daily Script." You will see a list of six items with Yes/No. To change the selections that will run as part of the script, simply double click on the Yes/No. We recommend using the default settings and they are as follows:
  - a. Yes – Backup Files
  - b. Yes – Compress Files
  - c. Yes – Send to Home Office
  - d. No – Download documentation
  - e. No – Download upgrade
  - f. No – Send logs to Aspect Software
- 9) Next, choose Script Options in the top left of the box. A new box will appear called Edit Script Options.
- 10) In Edit Script Options, choose "Include in Action Menu" located in the third box on the left entitled "Miscellaneous."
- 11) Once finished, hit OK
- 12) Once finished with Edit Scripts, hit 'Close'

## EXPORT STORE

- 1) Select File / Export Store. An Export Store box will appear.
- 2) In the first box, Profile Name select All Store Files.
- 3) In the second box, the name of the store listed, not all stores
- 4) In the third box, export file name should be aspect.fil.
- 5) We recommend using the following settings for the rest:
  - a. Period to Export – Last 3 days
  - b. Starting Date – Should automatically deduct 3 days from today's date.
  - c. Uncheck – Do not export files containing...
  - d. Check – Always export entire file
  - e. Uncheck – Compress the export file...
- 6) Once you have selected these settings, simply hit "save profile" and then choose "Cancel." Your settings have been saved.

To test that you have set up the Aspect portion correctly, simply go to Action / Aspect – Daily Script and the program should run, sending a file to the FTP site.

## SETUP WINDOWS TASK SCHEDULER – TO AUTOMATE



- 1) Go to Start / Settings / Control Panel / Task Scheduler
- 2) Navigate the Wizard to c:\aspect\script.bat and follow the prompt dictated by Windows.
- 3) Once the scheduled task appears in the task scheduler, simply right click and choose properties. In the path of the script, c:\aspect\script.bat, simply modify it to read c:\aspect\script.bat "Aspect – Daily Script." Save your changes and follow the prompt dictated by Windows. It is case sensitive.
- 4) To test, right click and choose run. The task should run, sending a file to the FTP site.

Should it fail for any reason, simply go to c:\aspect\ftp\ftp.log and you will see a step by step detail of the entire process and you will be able to determine where the script failed. For further questions / answers on FTP failure, please refer to the FAQ.

## CORPORATE LOCATIONS – DOWNLOAD

### STORE SETTINGS

- 1) Select Settings / Store Settings. You need to add a store for each store you have.
- 2) Simply hit the green plus and add each store, making sure you use the same name and store code for each store you have.
- 3) Choose the Point-of-Sale type
- 4) Click OK and if it asks you to create a store directory, click YES.
- 5) The system will then ask you to create a batch file. You do not want to do this. Select Cancel instead, simply making the store entry and not the batch file.
- 6) Close the window.

### FTP SETTINGS

- 1) Select Settings / FTP Settings. You will see a box where you will need to fill in your FTP information.
- 2) In the drop down menu option, choose your Windows Operating System Version.
- 3) In the first box on the left column, you will need to enter in the name of the dial-up connection if you are using a dial up account to get to the Internet, such as AOL, Netzero, or Earthlink. To determine the name of the dial up connection, go to Dial and Network Connections in your control panel and simply copy the name of the shortcut and place it in the box. The name is case sensitive, for example "Dial Up to AOL." On the other hand, if you are using a static connection to the Internet where you are always connected to the Internet, simply type in the phrase "Internet."
- 4) In the second box on the left column, if you are using a dial up connection, enter in the user name for the dial up connection. If you are using a static connection, no entry is required.
- 5) In the third box on the left column, enter the password for the dial up connection. If you are using a static connection, no entry is required.
- 6) In the first box on the right column, enter the name or IP address of your FTP Server. For instance, [ftp.aspect-software.net](http://ftp.aspect-software.net) or 216.144.144.2.
- 7) In the second box on the right column, enter the username for the FTP server. The username has to have read and write permissions. To set up permissions, see your hosts FTP documentation or your network administrator.
- 8) In the third box on the right column, enter the password for the FTP server.
- 9) In the final box, simply leave the Aspect Login the same.

### SCRIPT SETTINGS

- 1) Select Settings / Scripts. A box will appear called Edit Scripts.
- 2) Using the drop down menu in the Name box, choose "Aspect – Import at home office." Once selected, choose "Edit" on the left side of the box and an Import Store Files box will appear. We recommend using the default settings and they are as follows:
  - a. Description – Transfer and Import
  - b. Store to Import – All stores
  - c. Import Profile – All Files
  - d. Import file name – [storedir][storecode].fil
  - e. Checkmark in Compress file using Pkzip
  - f. Compressed file name – [storedir][storecode].zip
  - g. Checkmark in Download the import file from an FTP site
  - h. FTP Site to use: "Default"
  - i. FTP Directory – [storecode]
  - j. FTP File Name – [storecode].zip
  - k. Local Directory – [storedir]

\*\* If you wish to change these settings, please refer to the naming conventions section of the FAQ for file descriptions



- 3) Once finished, hit OK
- 4) Next, choose Script Options in the top left of the box. A new box will appear called Edit Script Options.
- 5) In Edit Script Options, choose "Include In Action Menu" located in the third box on the left entitled "Miscellaneous."
- 6) Once finished, hit OK
- 7) Once finished with Edit Scripts, hit 'Close"

To test that you have set up the Aspect portion correctly, simply go to Action / Aspect – Import at home office and the program should run, importing the files from the FTP site.

#### SETUP WINDOWS TASK SCHEDULER – TO AUTOMATE

- 1) Go to Start / Settings / Control Panel / Task Scheduler
- 2) Navigate the Wizard to c:\aspect\script.bat and follow the prompt dictated by Windows.
- 3) Once the scheduled task appears in the task scheduler, simply right click and choose properties. In the path of the script, c:\aspect\script.bat, simply modify it to read c:\aspect\script.bat "Aspect –Import at home office." Save your changes and follow the prompt dictated by Windows. It is case sensitive.
- 4) To test, right click and choose run. The task should run, sending a file to the FTP site.

#### TROUBLESHOOTING THE FTP TRANSFER

1. Is there a .fil file in the store directory at the store? If not, the export routine was not executed. Look at the log in the windows task scheduler for an error message.
2. If so, select File / Import Store at the store and select the file. Press the Info button to verify the date/time the file was created and the information it contains. Is it current? If not, the export routine was not executed.
3. Is there a zip file in the store directory containing the .fil file with the same date/time as the .fil file? If not, the zip process failed perhaps due to insufficient disk space.
4. Is there a zip file on the ftp server that is the exact same size as the zip file at the store? If not, the file didn't transfer to the ftp site. Look at the script log to determine why it failed.
5. Is there a zip file in the store directory at the office that is the exact same size as the one at the store? If not, then the download failed. Look at the script log to determine why. Perhaps the script didn't run. Look at the log in the windows task scheduler for an error message.
6. Look at the script log to see that the import was actually executed at the home office. Perhaps the store code is incorrect.

**\*\*Remember to always look at the Activity Log and Script Log under File\*\***

One of these will not be true. Knowing which one is not true will indicate the source of the problem. Should it continue to fail for any reason, simply go to c:\aspect\ftp\ftp.log and you will see a step by step detail of the entire process and you will be able to determine where the script failed.

For further questions / answers on FTP failure, please refer to the FAQ.

For additional setup and instructions outside of this scope, please contact Aspect Software.

