Confirm®

Confirm Task Processor - Contractor Access XML
Version v18.20a.AM
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The Confirm Task Processor is an individual component within the Confirm release package and is installed as a Windows service through its installer. It supports processing of the Agents that are available within the ‘Scheduled Tasks’ screen.
Contractor Access XML Agent

This Agent provides an automated method of interfacing between Confirm and multiple Contractor systems. The Agent can be used for the following:

- Send requests for quotes for work from the Contractor.
- Receive quotes from the Contractor (items and quantities).
- Send Committed Works Orders to the Contractor for work to be carried out.
- Receive Job Status Updates on completion of work or at interim stages.
- Receive Payment Requests for interim or final payment.
- Send Payment confirmation.

Information is transferred from Confirm to the Contractor systems by means of text files or requests to a Web Service, and can be received from Contractor systems by means of text files in a variety of formats.

Operation

On each scheduled run, the Agent processes all configured Contractors in turn.

It first of all checks whether there are any Jobs, Works Orders, Variation Orders or Payments for the Contractor awaiting export, and if so exports them to each configured Export Transformation for that Contractor.

It then checks whether there are files in any of the import folders configured for the Contractor, and if so imports each one in turn.

Export

The Agent extracts information relevant to the Contractor from the Confirm database and creates an XML structure containing that information, to be sent to the Contractor system. The following types of record are included in the XML data:

- Jobs at an ‘Export to Contractor’ Status, and with a preferred Contract which is assigned to this Contractor.
- Committed Works Orders.
- Committed Variation Orders.
- Committed Payments.

The XML data is then processed by all the Export Transformations configured for the Contractor. Each of these may optionally transform the data using an XSL stylesheet (e.g. to select which parts of the data to output, or to define the format of that output), and determines whether the transformed data is exported to a file or to a Web Service.

Each export is recorded in the database with a Status of ‘Successful’ or ‘Failed’ and other information such as details of response from the destination Web Service. Previous exports can be seen on the Agent Export Log screen (see below).

Note that an export to a Web Service which fails due to a receiver error (for example the Web Service is currently down) will be set to a ‘Pending Resend’ Status, providing it has not already been sent 10 times. If it has reached this limit, it will be set to a ‘Failed’ Status.

Once all new data has been exported, the Agent will then attempt to resend any previous exports that are at a ‘Pending Resend’ Status. These could be failed exports to a Web Service as mentioned above, or exports manually selected to be resent by a User.
Import

The Agent can also import data from a Contractor system in a variety of file formats. The following data can be imported:

- Job Status Updates.
- Job Items.
- Job Document Links.
- Variation Orders.
- Payment Requests.

The Agent first checks for any files in the Import Directory specified on the Additional tab of the Contractor screen. Files imported from the Import Directory must be in the tab delimited format defined in the Contractor Access XML Agent Specification.

The Agent then checks each configured Import Transformation for the Contractor to see whether files are present in its Input Directory. If the Import Transformation has a Stylesheet specified, then the transformed file must meet the specification.

Agent Export Log

The Agent Export Log screen can be used from within Confirm client to view the status of recent or historic exports, and for example to see response detail to determine reasons for failure. It also allows previous exports to be flagged to be resent next time the Agent runs, and anything currently flagged to be resent to be cancelled.

See Agent Export Log for more details.

Specification

The Specification section for this agent provides more details on file format and structure.

Configuration

This section details how to configure the Contractor Access XML Agent.

1. Check that the Contract Access XML Agent Module (1620) is enabled.
2. Ensure that the agent is scheduled as a Task in the Scheduled Tasks screen within the Confirm client.
3. Setup any Import Transformations required. To do this go to the Contractor Lookup and retrieve the Contractor you wish to configure. Then click on the Import button to access the Import Transformation screen for that Contractor.
4. Setup any Export Transformations required. To do this go to the Contractor Lookup and retrieve the Contractor you wish to configure. Then click on the Export button to access the Export Transformation screen for that Contractor.
5. Authorise Contractors to be able to change a Jobs Status via an import file. This is achieved via the Job Status Lookup. To authorise a Job Status for a Contractor retrieve the Job Status in the lookup and tick the ‘Available to Contractor’ check box.
6. Create the directory structure on the Confirm Task Processor server for imports and exports. The following shows the preferred directory structure for the Contractor Access XML Agent (where ‘<Contractor Name>‘ denotes a separate sub-directory for each Contractor):
7. Ensure the Task Processor is configured and running