

### Hot Folders Installation & Configuration Guide infoRouter - Version 8.0.x

Active Innovations, Inc. A Document Management Company

www.inforouter.com

#### Description

This application is an NT Service that polls NT File System Folders on scheduled intervals and imports the contents of these folders into infoRouter. It also supports importing metadata.

#### Requirements

The server on which this utility runs must have HTTP access and connection to the infoRouter Document Server.

This service requires infoRouter version 8.0.x or greater.

The server this utility runs on must be configured to run one of the Windows platforms we support (Windows 2016-2019-2022).

#### Installation

The setup.msi file is under the "infoRouter installation path\Program Setups\HotFolders" directory. Run this setup program and follow the onscreen instructions. Program installation defaults to the "C:\IRHOTFOLDERS" directory, but this can be changed during installation.

#### Installation

Navigate to the infoRouter application path

Navigate to the ProgramSetups/Hotfolders folder

Double-click on HotFoldersSetup.msi to launch the setup program.

Page 3 of 18 infoRouter Hot Folders Configuration Guide - Version 8.0.x Copyright Active Innovations, Inc.

File Edit View Tools	Help	rogramSetups	▼ 49 Se			
🖣 Organize 🔻 🏢 Views 👻 🗗 Install 👻 🔞						
Folders	*	Name	Date modified	Туре	Size	
]] InfoRouter	*	HotFolders.pdf	1/29/2009 9:10 AM	Adobe Acrobat D	878 KB	
🌗 Add-ins		HotFoldersSetup.msi	3/10/2009 9:57 AM	Windows Installer	1,609 KB	
퉬 Catalog		1				
Categories						
Config						
eMailRoot						
EmailTemplates						
Gadgets IRMaintenance	Ξ					
IRMaintenance						
Logs						
mysql						
NotificationQue						
Portals						
ProgramSetups + Comparison						
eMailScanner						
HotFolders						
ifilters						
퉬 LDAP Authentication V						
LDAP Synchronization						
PDF Conversion Web S	e					
SearchPages						
Jite						
	Ŧ					
Jemp Ima HotFoldersSetu	.ms	i Date modified: 3/10/200	9 9:57 AM			

😸 infoRouter Hot Folders	- 0 🔀
Welcome to the infoRouter Hot Folders Setup Wizard	
The installer will guide you through the steps required to install infoRouter Hot Fol computer.	ders on your
WARNING: This computer program is protected by copyright law and international Unauthorized duplication or distribution of this program, or any portion of it, may re or criminal penalties, and will be prosecuted to the maximum extent possible unde	sult in severe civil
Cancel < <u>B</u> ack	<u>N</u> ext >

📸 infoRouter Hot Folders	- • •
Select Installation Folder	
The installer will install infoRouter Hot Folders to the following folder.	
To install in this folder, click "Next". To install to a different folder, enter it be	elow or click "Browse".
Eolder: C:\IRHOTFOLDERS\	Browse Disk Cost
Install infoRouter Hot Folders for yourself, or for anyone who uses this co	mputer:
⊚ Just <u>m</u> e	
Cancel < <u>B</u> ack	<u>N</u> ext >

😥 infoRouter Hot Folders	- • •
Confirm Installation	
The installer is ready to install infoRouter Hot Folders on your computer.	
Click "Next" to start the installation.	
Cancel < <u>B</u> ack	<u>N</u> ext>

Page 6 of 18 infoRouter Hot Folders Configuration Guide - Version 8.0.x Copyright Active Innovations, Inc.

😸 infoRouter Hot Folders	
Installing infoRouter Hot Folders	
infoRouter Hot Folders is being installed.	
Please wait	
Cancel	< <u>B</u> ack <u>N</u> ext >
😸 infoRouter Hot Folders	
Installation Complete	
infoRouter Hot Folders has been successfully installed.	
Click "Close" to exit.	
Please use Windows Update to check for any critical update	es to the .NET Framework.
Cancel	< <u>B</u> ack

The Hot Folders program is now installed but must be configured before it can be used.

		Search	<b>-</b>		
File Edit View Tools Help					
Organize ▼ III Views ▼     Folders ▼     IRHOTFOLDERS     MSOCache     My Documents     My Downloads	Name Mame HotFoldersServiceManager.exe InfoRouterHotFolders.exe InfoRouterHotFolders.InstallState InstallUtil.exe	Date modified 3/10/2009 3:57 PM 3/10/2009 3:57 PM 6/5/2010 11:53 AM 10/20/2006 3:14 AM	Type Application Application INSTALLSTATE File Application		
OutlookData Output PDF Source PDFTest PerfLogs Processed Images	Instance and a second s	3/10/2009 3:57 PM 11/2/2009 9:56 AM 3/4/2009 6:45 PM	Application Extens XML Configuratio Application Extens		
<ul> <li>Program Files</li> <li>Program Files (x86)</li> <li>ProgramData</li> <li>screenruler</li> </ul>	✓		•		
HotFoldersServiceManager.exe Date modified: 3/10/2009 3:57 PM Application Size: 2.94 MB Date created: 3/10/2009 3:57 PM					

Double-click on the "HotFoldersServiceManager.exe" to launch the Hot Folders Configuration Manager.

This program allows you to specify:

- Hot Folder paths
- Specific Meta Data
- Corresponding target infoRouter paths

#### Configuration

The following screen will be displayed:

	lot Folders Service	Controller	ervice Cor	ntroller		
St	art Service	Import Path		Import Meta	Target InfoRouter Path	
Service is stopped						
_		Add	Edit	Delete		<u>Close</u>
Service Is	Stopped		Click the " path.	Add" butto	n to add a new hot folder	

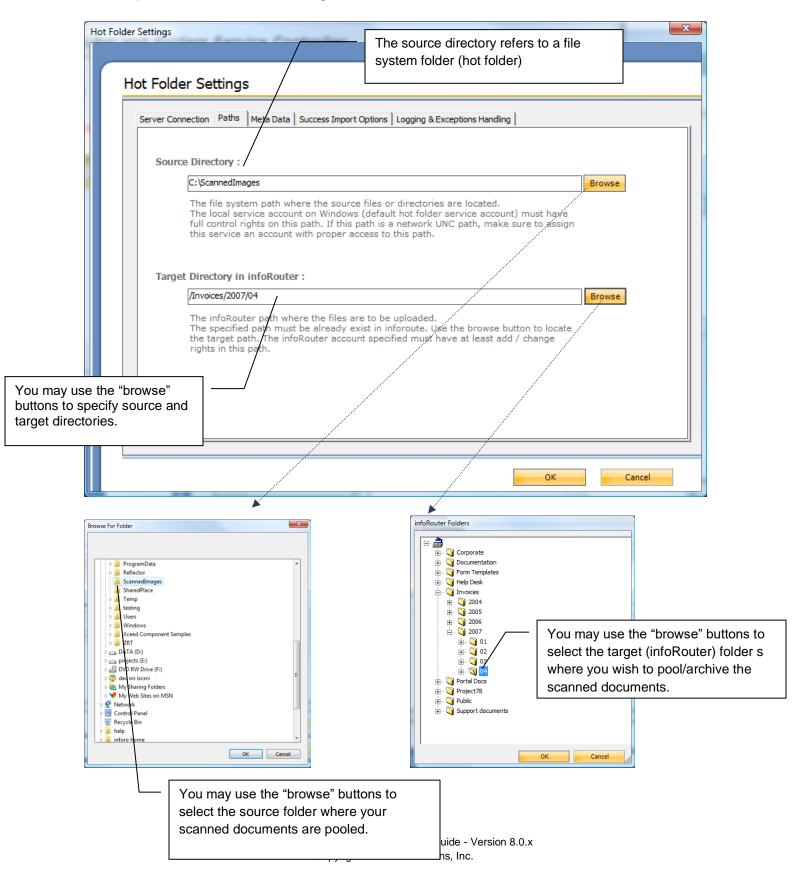
#### Connecting to infoRouter

Follow the on screen configuration instructions and type the connection and login information.

Hot Folder Settings Hot Folder Set	A tabbed wizard will help you configure a single hot folder
Server Connection	Paths   Meta Data   Success Import Options   Logging & Exceptions Handling
	infoRouter Web Service URL : http://docsrv/inforouter/srv.asmx The fully qualified URL of the infoRouter web services. example : http://documentsrv/inforouter/srv.asmx
	infoRouter User Name : sysadmin infoRouter User Name. The hot folder service uses this user name to connect to the infoRouter server. This account will become the owner of all documents and folders uploaded to the defined infoRouter target path. This account must have at least add / change rights on the target infoRouter Path.
	infoRouter User Password : ************************************
	Test Connection Server connection succesfully created. [7.5]
Test your connection parameters	OK Cancel

#### Selecting Source and Target Paths

Click the paths tab. Enter source and target directories.



#### Selecting the Meta Data Format

Hot Folder Settings
Hot Folder Settings
Server Connection Paths Meta Data Success Import Options Logging & Exceptions Handling
O No Meta Import
<ul> <li>infoRouter Meta Data Structure         For each file in the source path, the application will look for a file with same name with a ~(tilde) prefix. This file must be in XML format.         For example for the file "invoice-12903.pdf" the meta file must be named "~invoice-12903.pdf".     </li> </ul>
Meta Data Specs         © Capture Plus Meta Format         For each file in the source path, the application will look for a file with same name with a txt extention. Text files will be treated as meta data files.         For example for the file "invoice-12903.pdf" the meta file must be named "invoice-12903.txt".
Meta Data Specs             KYOcapture Meta Format
The document contains both the meta and a binary 64 base string. Kyocera multi-function printers/scanners can be configured to support this format.
Meta Data Specs
OK Cancel

Hot folders support three different Meta data formats:

1 – InfoRouter Meta Data Structure:

For each file in the source path, the application will look for a file with same name with a ~(tilde) prefix. This file must be in XML format. For example for the file "invoice-12903.pdf" the Meta file must be named "~invoice-12903.pdf".

A sample Meta file is shown below. Meta file must be in valid XML 1.0 format.

#### **Remarks:**

irdoc.description	Will be assigned as the document description of the imported document
irdoc.updateinstructions	Will be assigned as document update instructions
irdoc.doctypeid	Will be the document type
irdoc.flowdefid	Will be the flow definition id that the document to be submitted
Propertyset.NAME	Value of the Name attribute of property set item must match to an existing infoRouter custom property set name.
propertyrow.(*)	The attribute names of the propertysetrow item must match the field names of the custom property set.

Data values must be in the convertible format to infoRouter custom property field data types.

If a custom property set field is defined as a required field type, then this field must have a value in the property set row.

#### 2 – Capture plus Meta Format:

The application will look for a file with the same name and the extension ".txt" for each file in the source path.

For example, for the file "invoice-12903.pdf," the Meta file must be named "invoice-12903.txt". The meta file is in a format like the following:

```
1233=doctypeid
123456=flowdefid
INVOICE=Custom Property Name
ABC INC=CUSTOMER
90909=INVOICENUMBER
2002-04-03=INVOICEDATE
5000=AMOUNT
```

Note: "=flowdefid" declaration must occur before custom property declarations.

If the program sees "=Custom Property Name" as a suffix, that subsequent line must have the values of the specified custom property fields.

Note: This meta format has very limited support and is preserved for backward compatibility. We recommend "infoRouter Meta Data Structure."

#### 3 – KYOCapture Plus Meta Format:

This format supports especially for the KYOCERA scanners. The file content that is subject to import is the part of the big xml file. The Meta data is also part of the xml file.

For each file in the source path, the application will look for a file with same name with ".txt" extension. For example for the file "invoice-12903.pdf" the Meta file must be named "invoice-12903.txt". The Meta file in a special format like below.

```
<AutoStore>
<KnowledgeObjects Count="1">
<KnowledgeObject>
<KnowledgeDocuments Count="1">
<KnowledgeDocument Content="[base64 encoded] doc content" Type="pdf" Name="AS 002C.pdf"/>
</KnowledgeDocuments>
<KnowledgeFields>
  <Field Name="FOLDER" Value="Client Documents"/>
  <Field Name="DOCTYPEID" Value="1312321"/>
  <Field Name="FLOWDEFID" Value="1434"/>
  <Field Name="CSET.CLIENTS.CLIENTNAME" Value="Johnson Computers"/>
  <Field Name="CSET.CLIENTS.DOCUMENTTYPE" Value="Tax Return"/>
  <Field Name="CSET.CLIENTS.DATE" Value="2/5/2007"/>
</KnowledgeFields>
</KnowledgeObject>
</KnowledgeObjects>
</AutoStore>
```

**Remarks**: The data structure of this xml pre-designed by KYOCERA scanners. If you don't use this kind of scanners we recommend infoRouter import Meta type.

#### **Selecting Import Options**

Hot Folder Se	
	Folder Settings         erver Connection       Paths       Meta Data       Success Import Options       Logging & Exceptions Handling
	Move successfully imported files     C:\scannedimage_BackupArchive     Browse     When selected, this option moves original documents after successfully importing them
	into the specified path.
	C Delete successfully imported files
	When selected, this option deletes the original documents after successfully importing them into infoRouter.
	Important Note: The only copy of the document will be in infoRouter.
	OK Cancel

#### Selecting Logging Options

#### Select the logging directories.

Hot Folder Settings	×
Hot Folder Settings	
Server Connection Paths Import Options Success Import Options Logging & Exceptions Handling	
Server Connection Paths Import Options Success Import Options Logging & Exceptions Handling	1
Move files that could not be imported :	
c:\scannedimage_Exceptions	
When selected, files that fail to import are moved to the specied path.	
Example : c:\exceptions	
Lee Bath :	
Log Path : c:\scannedimage_logs	
The path where logs are to be stored. Example : c:\logs	
Log successful imports	
OK Cancel	
Check this checkbox if you wish to log successful imports	
wish to log successful imports	

infoRouter Hot Folders Service	Router Hot Folders Service C <del>ontroller</del>		ervice" to sta ervice	art the	×	
infoRouter		t Folders Service Controller				
	Import Path		Import Meta	Target InfoRouter Path		
	C:\ScannedImages		true	/Invoices/2007/04		
Running						
Start Service						
Stop Service						
	Add	Edit	Delete			
		$\longrightarrow$				
	_	<u> </u>		Click the "Edit" button to		
lick the "Add" button to				ge the selected hot r properties		

Click "Start Service" button to start "hot folders" service.

#### Troubleshooting

If the service encounters any issues, an appropriate log entry will be placed in the Windows Event Log.

The service creates document import logs under the specified log directories.