

Hot Folders Configuration Guide infoRouter - Version 7.5

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Description

This application is an NT Service that polls NT File System Folders on a scheduled interval and imports the contents of these folders into infoRouter. It supports Meta data importing as well.

Requirements

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

This service requires infoRouter version 7.2 or greater.

The server on which this utility runs must be configured to run Windows 2000, Windows 2003 or Windows XP Pro Operating Systems

Installation

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

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Configuration

Use the "HotFoldersServiceManager.exe" to configure and manage the service.

The following screen will be displayed:

infoRe	outer Hot Folders Service	Controller	ervice Cor	ntroller	and the second	
	Stopped	Import Path		Import Meta	Target InfoRouter Path	
	Start Service					
Service is stop	ped /					
		Add	Edit	Delete		
Servi	ce Is Stopped					<u>C</u> lose
			Click the " path.	Add" butto	n to add a new hotfolder	

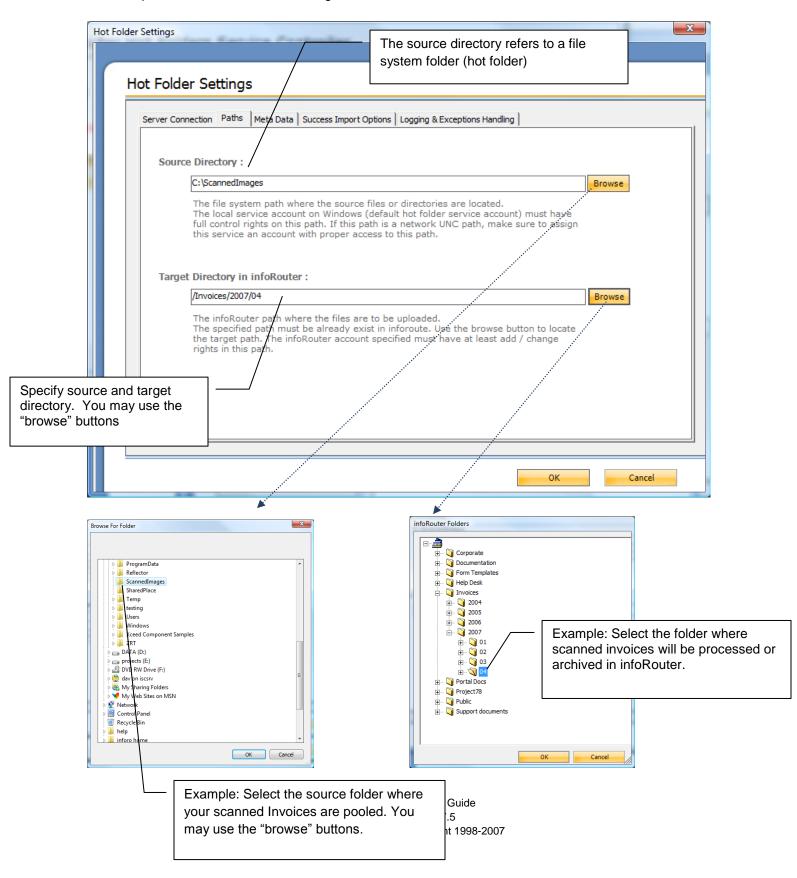
Connecting to infoRouter

Hot Folder Settings Hot Folder Sett	A tabbed wizard will help you configure a single hot folder				
	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 your connection parameters	OK Cancel				

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

Selecting Source and Target Paths

Click the paths tab. Enter source and target directories.



Selecting the Meta Data Format

lot Folder Settings
Hot Folder Settings
Server Connection Paths Meta Data Success Import Options Logging & Exceptions Handling
C No Meta Import
 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".
Meta Data Specs C 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

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.

```
<irdoc description="Lorem dolor sit amet..." updateinstructions="Lorem dolor sit</pre>
amet...">
  <propertysets></propertysets>
    <propertyset NAME="INVOICEHEAD"></propertyset NAME="INVOICEHEAD">
         <propertyrow INVOICENBR="9234234" BILLINGADDRESS="ABC INC. 7th ST. 89C</pre>
ATLANTA US 06349" SHIPPINGADDRESS="ABC INC. MAC DIV 12 th ST. #45 ATLANTA US"
AMOUNT="780.92" />
    </propertyset>
    <propertyset name="INVOICEDETAILS"></propertyset name="INVOICEDETAILS">
          <propertyrow ITEMNAME="893MS" QUANTITY="3" QUANTITYAMOUNT="100.00"</pre>
TOTAL="300.00" />
          cpropertyrow ITEMNAME="78SMMJJ3" QUANTITY="1" QUANTITYAMOUNT="480.92"
TOTAL="480.92" />
     </propertyset>
   </propertysets>
</irdoc>
```

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.

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

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

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2 – Capture plus Meta Format:

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.

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

Note: "=flowdefid" declaration must take place before custom properties declarations.

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

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

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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"</pre>
Name="AS_002C9302_0041_000.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>
```

Selecting Import Options

ot Folder	an desiring Castelina Constanting
	Server Connection Paths Meta Data Success Import Options Logging & Exceptions Handling
	Move successfully imported files
	c:\scannedimage_BackupArchive
	When selected, this option moves original documents after successfully importing them into the specified path.
	© 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

Selecting Logging Options

Select the logging directories.

er Settings
Server Connection Paths Meta Data Success Import Options Logging & Exceptions Handling
Move files that could not be imported : c:\scannedimage_Exceptions
Log Path : c:\scannedimage_logs The path where logs are to be stored.
Example : c:\logs
OK Cancel

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

infoRouter Hot Folders Service		Start Service" to sta ders service	art the	×
infoRouter	ot Folders Servio	ce Controller		
	Import Path	Import Meta	Target InfoRouter Path	
	C:\ScannedImages	true	/Invoices/2007/04	
Running				
Start Service				
Stop Service				
	Add E	idit Delete		
		Click	the "Edit" button to	<u>C</u> lose
Click the "Add" button to			ge the selected hot	
add another hot folder.		roide	r properties	

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.