



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

Active Innovations, Inc. A Document Management Company

www.inforouter.com

Hot Folders Installation & Configuration Guide

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.

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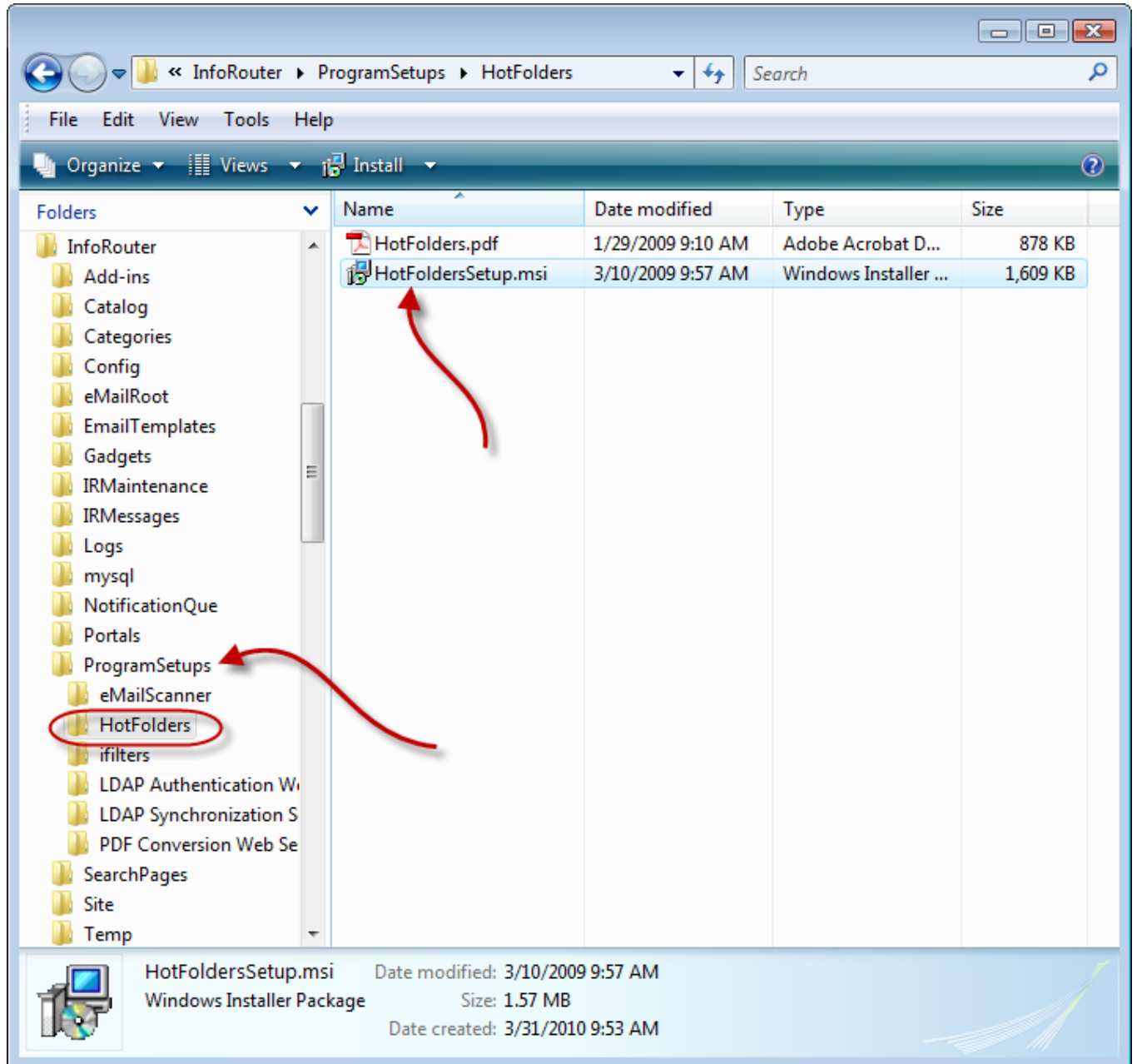
Installation

Navigate to the infoRouter application path

Navigate to the ProgramSetups/Hotfolders folder

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

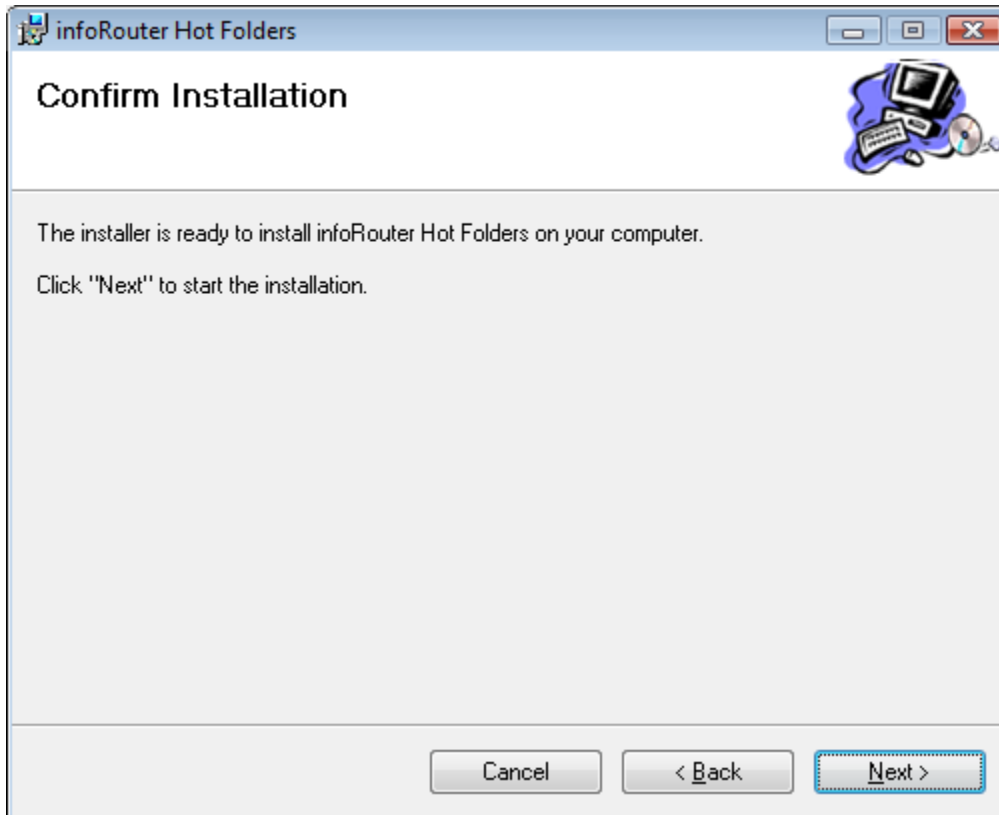
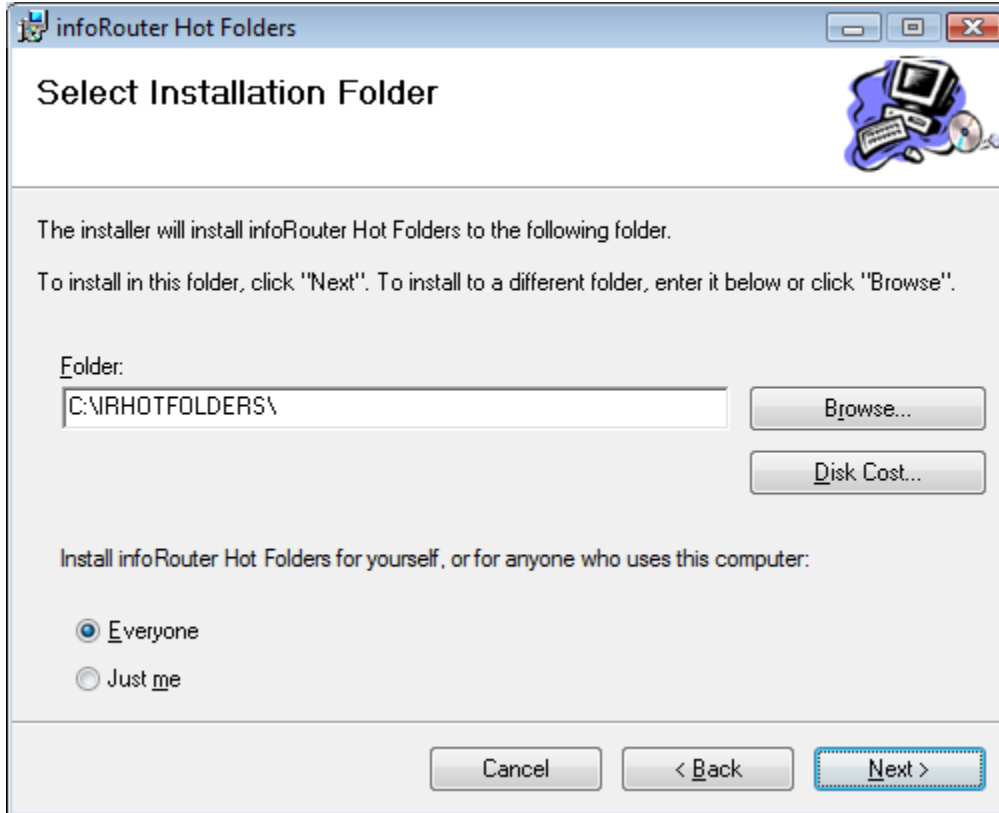
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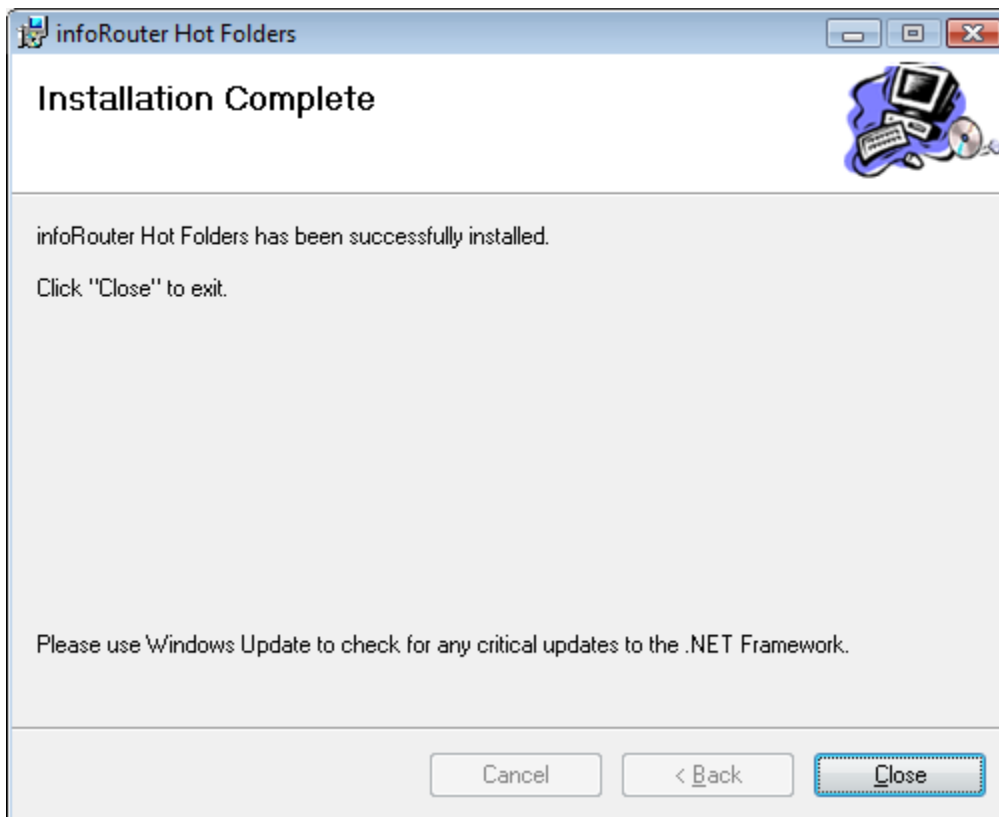
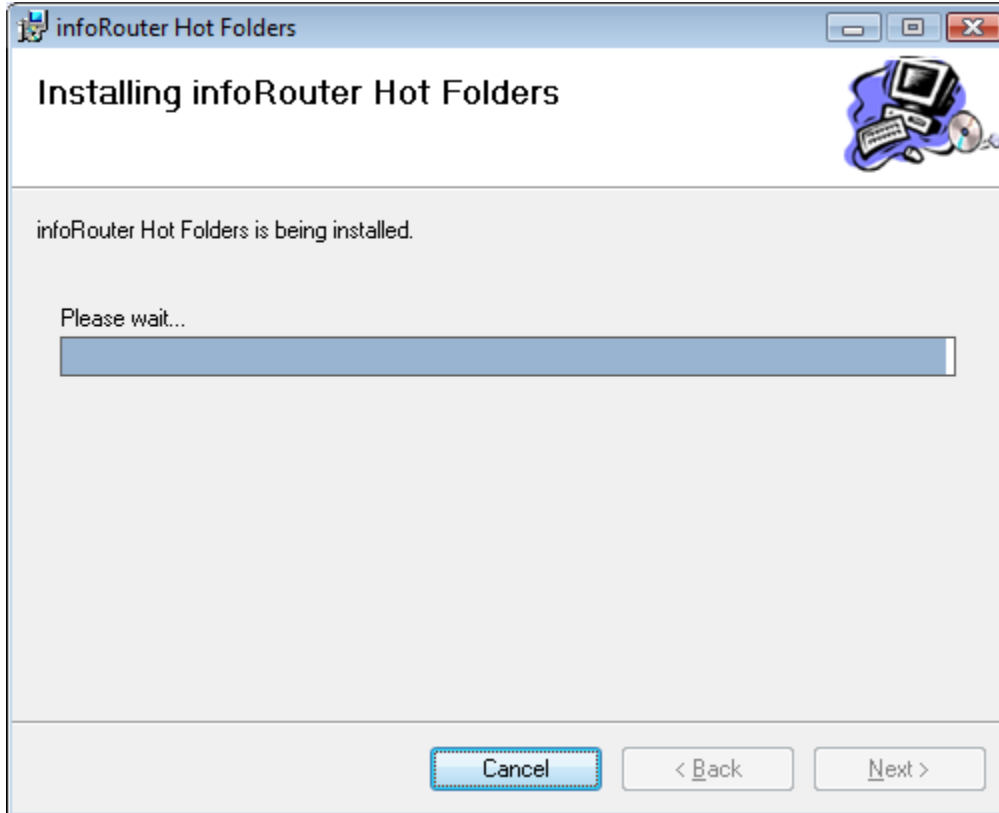
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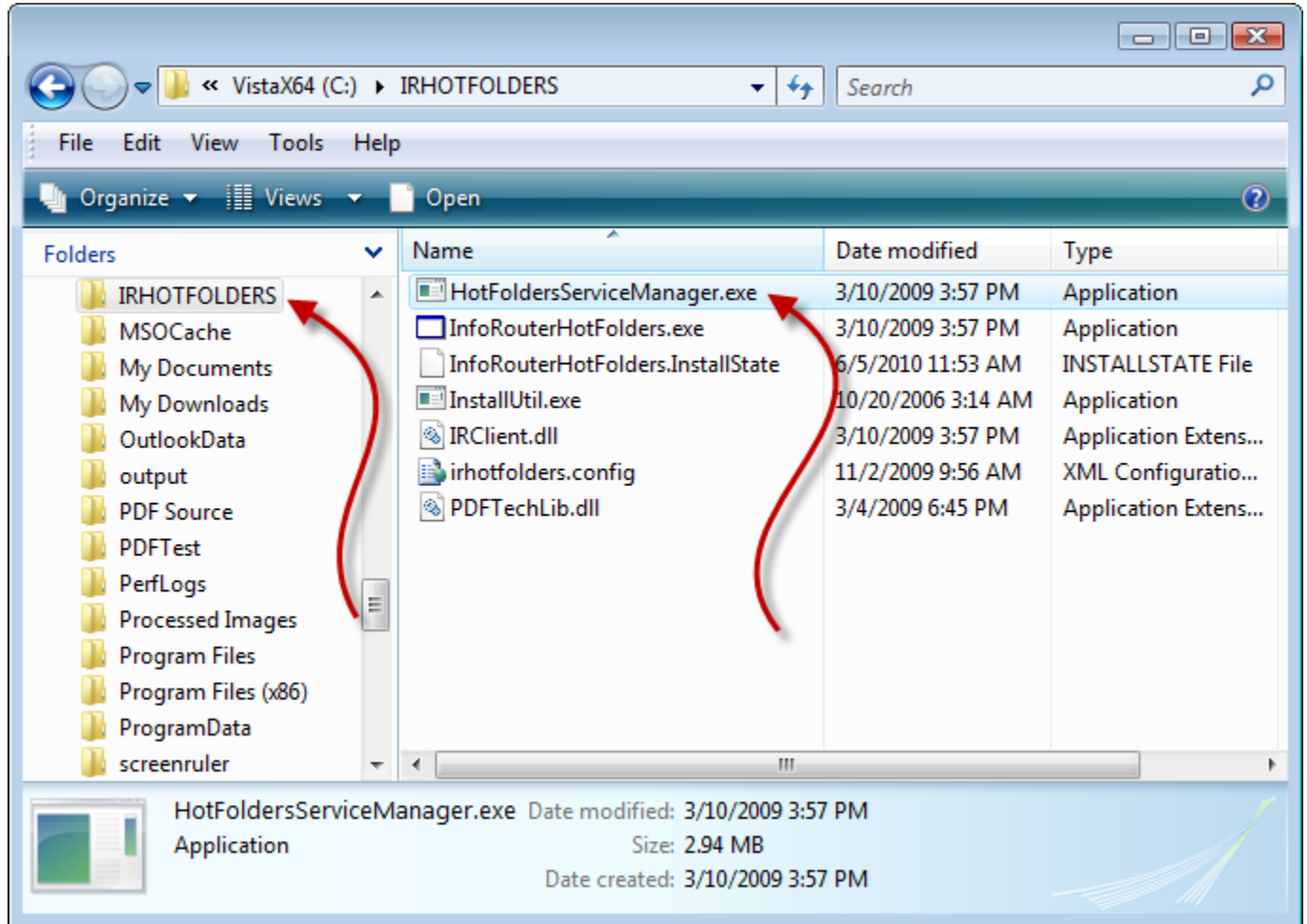


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The Hot Folders program is now installed but must be configured before it can be used.



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

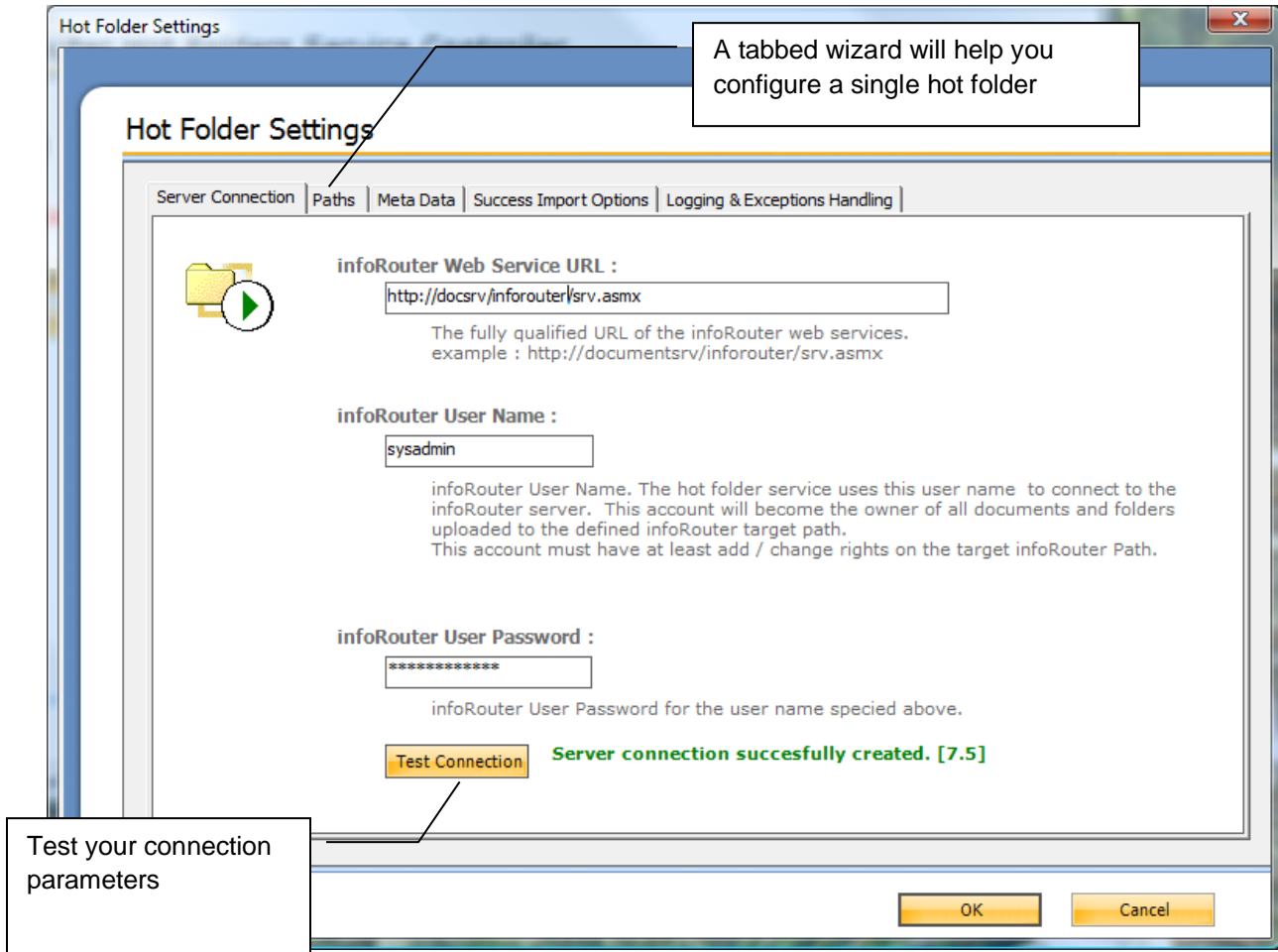
This program allows you to specify:

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

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Connecting to infoRouter

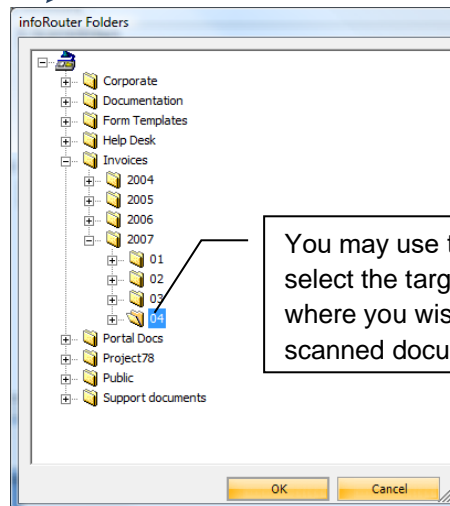
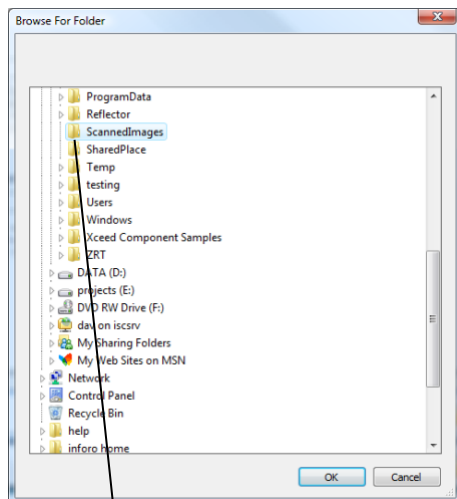
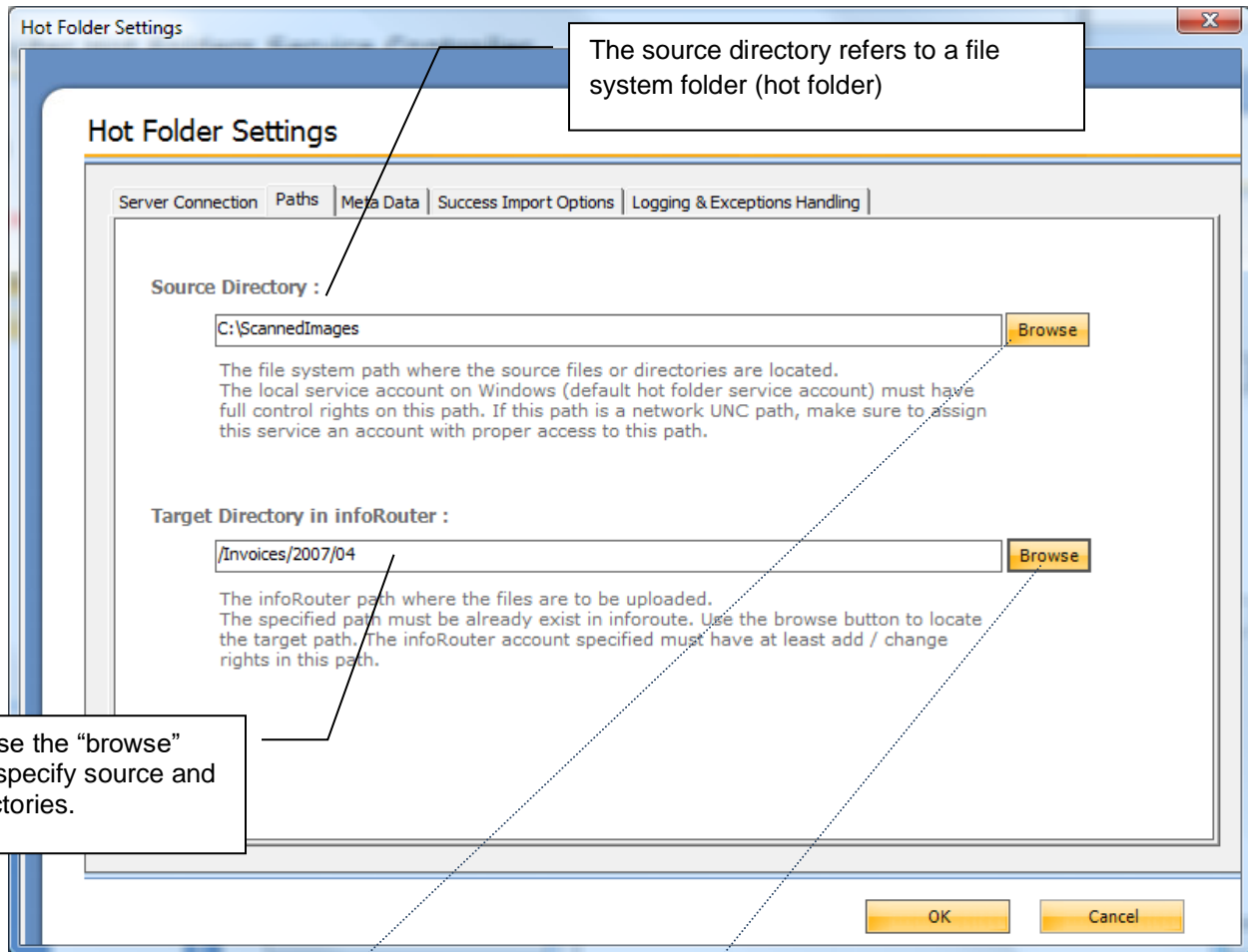
Follow the on screen configuration instructions and type the connection and login information.



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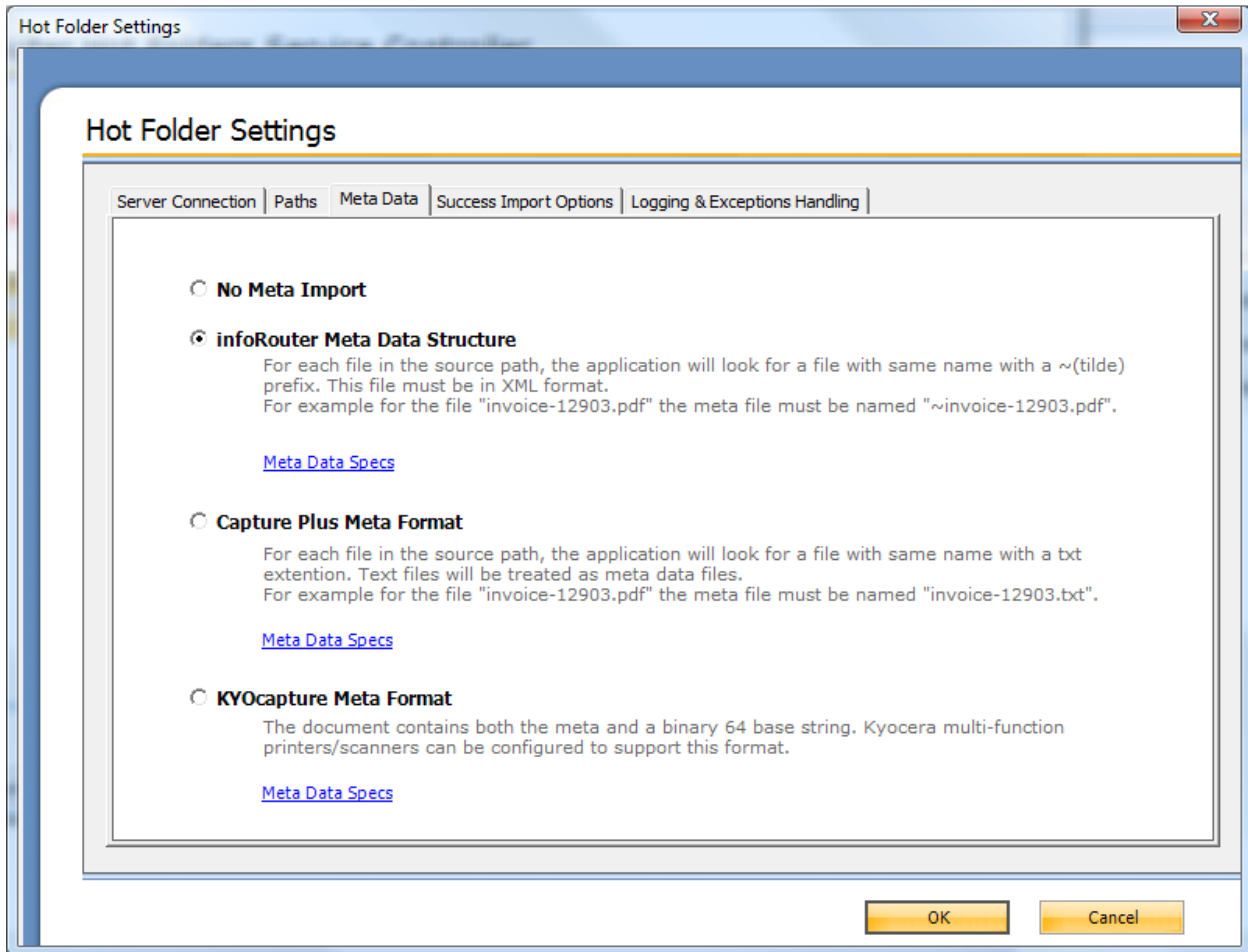
Selecting Source and Target Paths

Click the paths tab. Enter source and target directories.



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Selecting the Meta Data Format



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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="Document description" updateinstructions="These are update
instructions...">
  <propertysets>
    <propertyset NAME="INVOICEHEAD">
      <propertyrow INVOICENBR="923" BADDR="Acme 7th St. Atlanta, GA 06349" SHIPADDR="ABC
INC. MAC DIV 12th Street #45 ATLANTA US" AMOUNT="780.92" />
    </propertyset>
    <propertyset name="INVOICEDetails">
      <propertyrow ITEM="893MS" QUANTITY="3" AMOUNT="100.00" TOTAL="300.00" />
      <propertyrow ITEM="78SMMJJ3" QUANTITY="1" AMOUNT="480.92" TOTAL="480.92" />
    </propertyset>
  </propertysets>
</irdoc>
```

Remarks:

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

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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.”

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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.

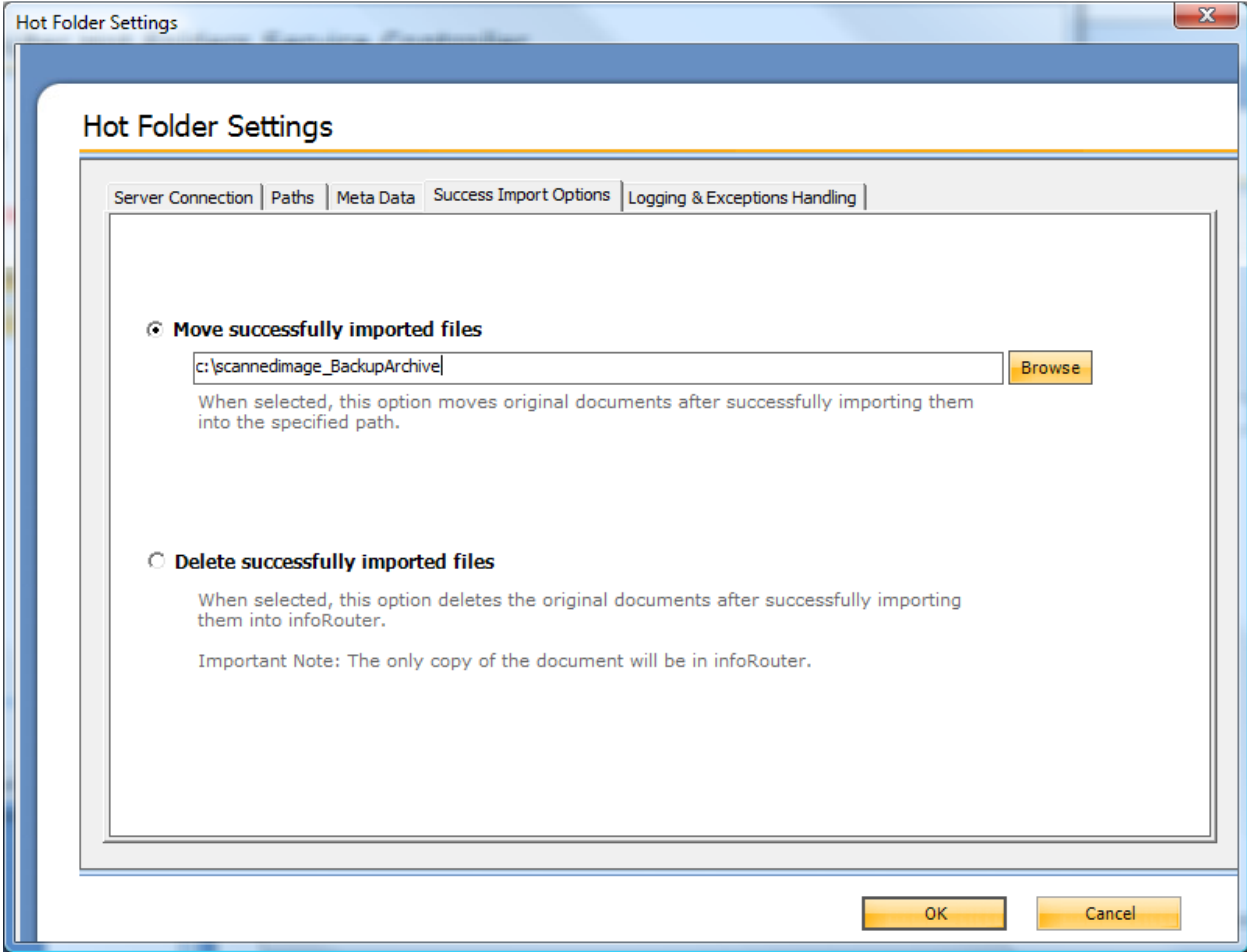
For each file in the source path, the application will look for a file with same name with “.txt” extension. For example for the file "invoice-12903.pdf" the Meta file must be named "invoice-12903.txt". The Meta file in a special format like below.

```
<AutoStore>
<KnowledgeObjects Count="1">
<KnowledgeObject>
<KnowledgeDocuments Count="1">
<KnowledgeDocument Content="[base64 encoded] doc content" Type="pdf" 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.

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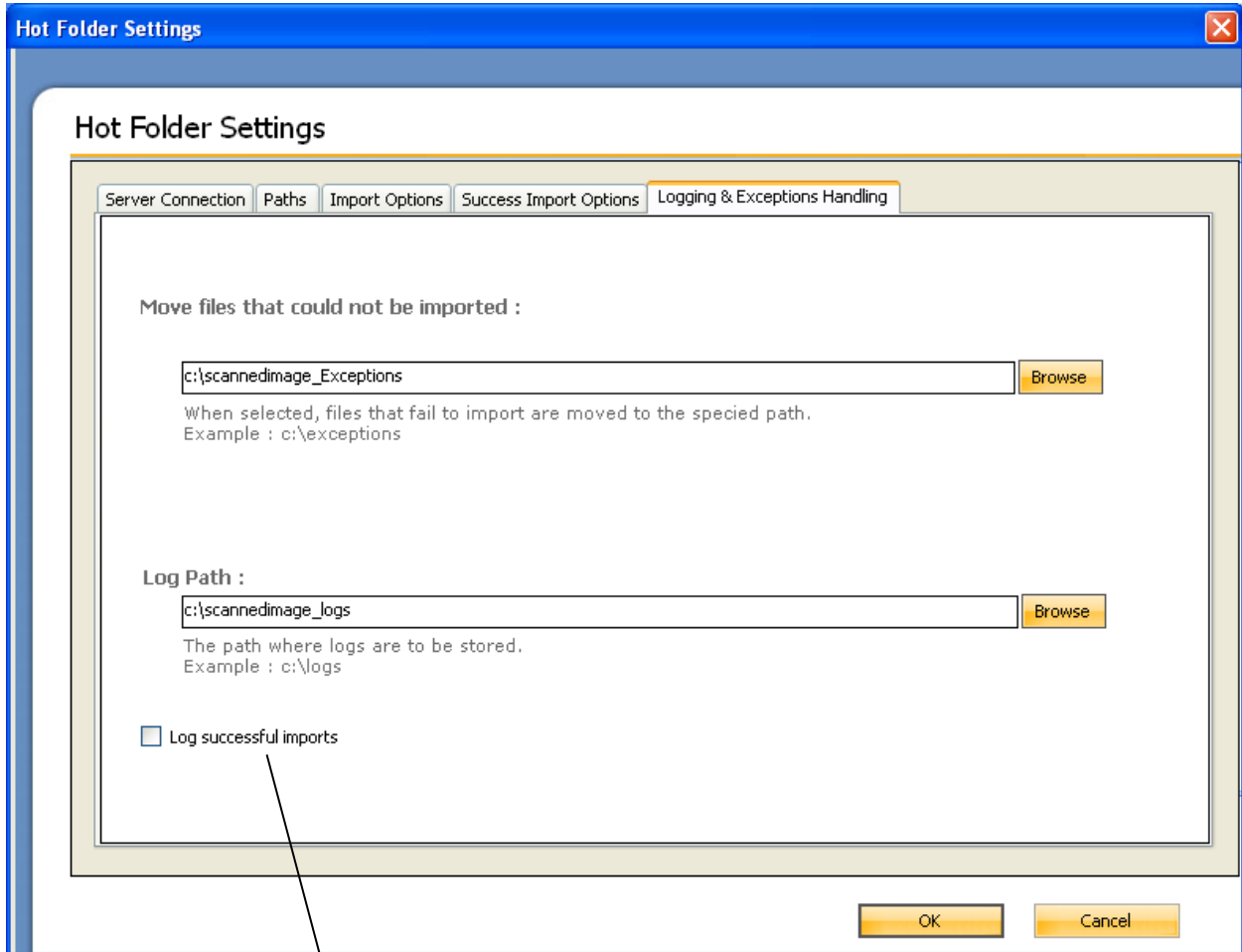
Selecting Import Options



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Selecting Logging Options

Select the logging directories.



Check this checkbox if you wish to log successful imports

