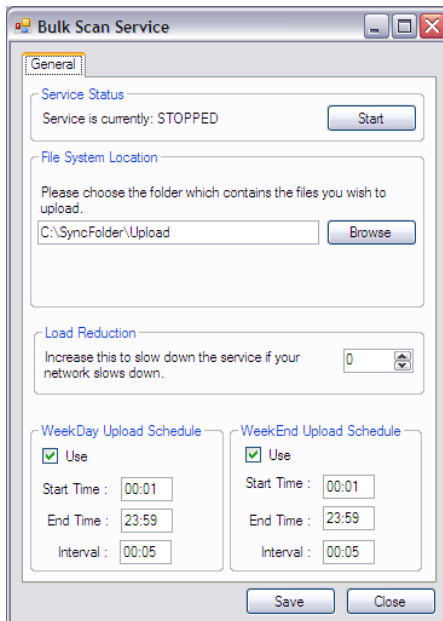


Instant Intelligence Archiving

Uploading files using Folder Synchronisation

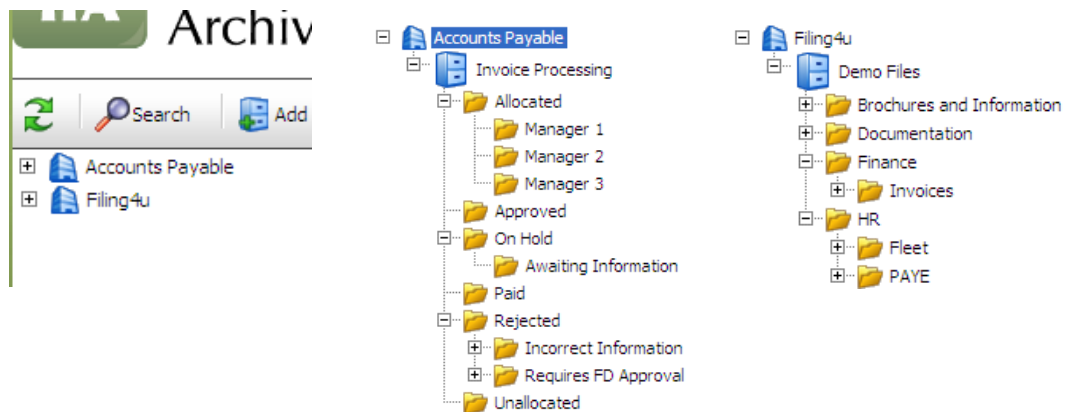
Instant Intelligence Archiving uses a Folder Synchronisation service to upload new files into the online system. The service runs in the background, and is very simple to configure.

You first need to start the service manually, when you will be asked to log in. The URL is the standard Instant Intelligence Archiving address, and you need a valid username and password with sufficient rights to create files.



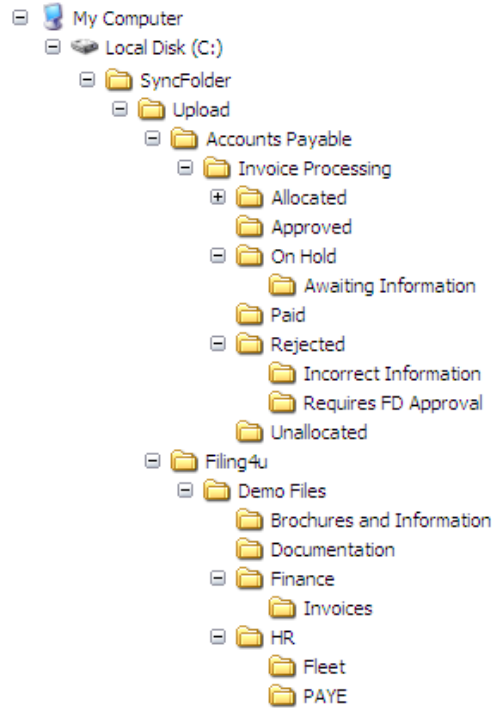
Once logged in, you will see the configuration screen. This presents several options, including the base folder on the local system with which to synchronise, and the frequency of synchronisations.

In this example, we have two clients on the live online system, "Accounts Payable" and "Filing4u", and within each of these clients there are a number of Cabinets and Folders:



Based on the File System Location specified in the configuration, when we start the service, an empty set of folders replicating those on the online system will be created on the local file system, in c:\syncfolder\upload.

A local folder will be made for each online Client, and within that a local folder for each Cabinet, within which will be folders matching the folders within the online system.



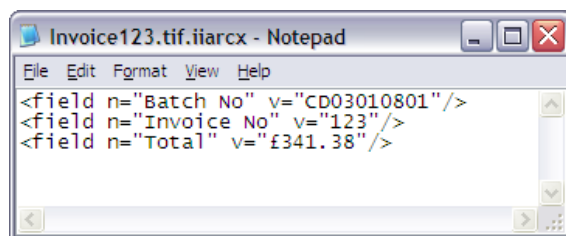
To upload files to the online system, it is simply a matter of putting them in the correct folder on the local file system. If you put a new folder within the local file system, it will be created automatically on the online system.

Replicating the online folder structure to the local file system opens up a range of possibilities for the automation of volume uploading. By having the folder structure available locally, it is possible to write applications that force users to put files in specific folders ready to be uploaded, without the user ever having to connect to the live system.

This also means that it is possible to develop complex archiving procedures without ever having to integrate with the online archive service. One example is the Indexing and Restructuring utility, which takes a text file containing file and index information, and maps it into a folder structure ready to be synchronised.

Attaching Index Information

Index fields can be attached to a file for synchronisation by putting an XML file with the extension '.IIARCX' alongside the actual file for synchronisation. So if the file was 'Invoice123.tif', index information could be uploaded by creating 'Invoice123.tif.IIARCX' in the same folder. The XML takes the format `<field n="Invoice Date" v="12/07/2008"/>...` for each index line, where n is the index field name and v is the field value. When the synchronisation runs, it simply looks for any files with the same name as the uploaded file plus the additional '.IIARCX' extension, and generates the index values to attach to the file from there.



Monitoring and Management

The synchronisation service maintains a local database of activities, ensuring that each file is only uploaded once unless it is changed. It is possible to interrogate the local database to check activities, and there are some tools to make monitoring more straightforward. The Sync Monitor utility will display on-screen up to the last 500 files uploading, giving brief information and enabling the user to check that files have been uploaded successfully.

Last Refreshed: 05/01/09 at 10:34			
			Waiting
Filing4u	demo	40015149.pdf	16/12 15:47
Filing4u	demo	001560.pdf	16/12 15:47
SyncFolder	Documentation	IIarc Client Guide.pdf	15/12 10:49
SyncFolder	Documentation	IIarc Client Admin Guide.	15/12 10:49
SyncFolder	Documentation	IIarc Admin Guide.pdf	15/12 10:49
Filing4u	Brochures	demo file.pdf	02/12 13:50
Filing4u	Invoices	F47547.tif	02/12 13:50
Filing4u	Invoices	464757.tif	02/12 13:50
Filing4u	UPST0777	40015149 (26 05 2006).pdf	01/12 15:53
Filing4u	UPST0676	40015607 (11 07 2006).pdf	01/12 15:53
Filing4u	UPST0676	40015606 (11 07 2006).pdf	01/12 15:53
Filing4u	UPST0676	40015605 (12 07 2006).pdf	01/12 15:53

Refresh Frequency (Mins) 5

Display last 500 files uploaded

The Sync Query utility enables a report to be generated detailing upload activity over a certain time period. This also includes a filter to restrict results to files of a certain name or in specific clients or folders. The results can be generated as a text file for viewing, or as a comma separated file for importing into a spreadsheet or database for further analysis if required.

iiARC Folder Sync Query

From: 05/01/2009 00:00:00

To: 05/01/2009 23:59:00

Filter: My Client

Text CSV

st from 03-09-08 0000 to 03-12-08 2359.TXT - Notepad

er Synchronisation Summary, test from 03/09/08 00:00 to 03/12/08 23:59

nt/Folder	Filename	Size	Date	Time
/Test	file1.txt	111	01/12	15:50
/Test	file2.txt	177	16/10	13:34

Summary

Total Files: 2
Total Size: 3288kb (3.21mb)

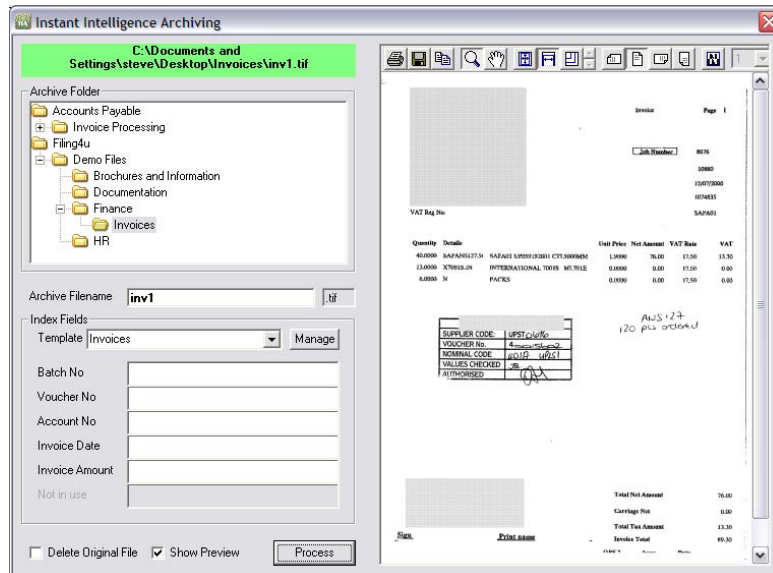
Preparing Files for Synchronisation

The easiest way to upload files is simply to put them in the relevant folder within the Sync Folder structure and leave the system to do the rest. This is fine for manual archiving of relatively low volumes of files, or for bulk processing of an existing structured set of folders and files. It does, however, require manually ensuring that the file is appropriately named and the correct folder selected, and does not readily allow for indexing details to be attached.

Whilst it is often more straightforward to upload or scan directly into the Instant Intelligence Archiving web interface, there is a simple tool for putting existing files into the appropriate folder within the Sync Folder structure and adding indexes. This tool may be of use for archiving specific files from a PC or server, or for archiving scanned images which have been delivered to a folder or desktop by a network scanner.

To archive a file, it is simply a question of either dragging it onto the 'Send to Instant Intelligence Archiving' icon on the desktop, or right-clicking and selecting 'Send to Instant Intelligence Archiving', depending on how your system has been set up.

This will then display the archiving options available, and, depending on the type of file you are archiving, display a preview of the file. There are then various options on the left side of the screen which enable the selection of the required client and folder, renaming of the filename, and the allocation of index fields. The management of index field templates is done by clicking the 'Manage' button and modifying the template file, with each different option defined in the format *TemplateName;Field1,Field2,Field3* up to a maximum of six fields. There is also an option 'Delete Original File' which will erase the original file from the local system once it has been processed.



Clicking on the 'Process' button will simply put a copy of the original file in the selected folder within the Sync Folder structure, renaming it to whatever has been specified in Archive Filename, and creating an associated .IIARCX index file if index fields have been defined.

If you run 'Send to Instant Intelligence Archiving' on a folder instead of an individual file, the entire contents of that folder will be processed one file at a time, so you can batch process and index an entire folder full of scanned pages if required.

Importing from an existing Archiving or Document Management System

If you have files stored in an existing system or database, then it is highly likely that some method of automating some or all of the uploading process can be devised. The Index File Converter is the core component in translating from other systems, taking a text file containing field, indexing and file information and allowing you to map it onto a Sync Folder structure.

Most systems are capable of generating an 'export' comprising of a text file and folders of images. Some systems are less flexible than others – Instant Intelligence can advise and support you in extracting the data from existing systems.

A typical exported text file should look something like this:

```
"Reference", "Month", "Day", "Filename"
"4103010801", "JANUARY", "03", "C:\SCANNED\CA2995\BOX 8 - 29-12-07\00000001.tif"
"CD03010801", "JANUARY", "03", "C:\SCANNED\CA2995\BOX 8 - 29-12-07\00000002.tif"
"CD03010802", "JANUARY", "03", "C:\SCANNED\CA2995\BOX 8 - 29-12-07\00000003.tif"
"D056030108", "JANUARY", "03", "C:\SCANNED\CA2995\BOX 8 - 29-12-07\00000004.tif"
"E022030108", "JANUARY", "03", "C:\SCANNED\CA2995\BOX 8 - 29-12-07\00000005.tif"
"E023030108", "JANUARY", "03", "C:\SCANNED\CA2995\BOX 8 - 29-12-07\00000006.tif"
```

If it doesn't, again there are additional tools and utilities which can be used to generate a similar format file to the above. Once we have such a file, the Index File Converter is used to determine which fields should be used as folder names, which as the file name, and which as indexes, and then place the relevant file with associated .IIARCX file in the relevant folder within the Sync Folder structure. A separate document on the Index File Converter is available on request.