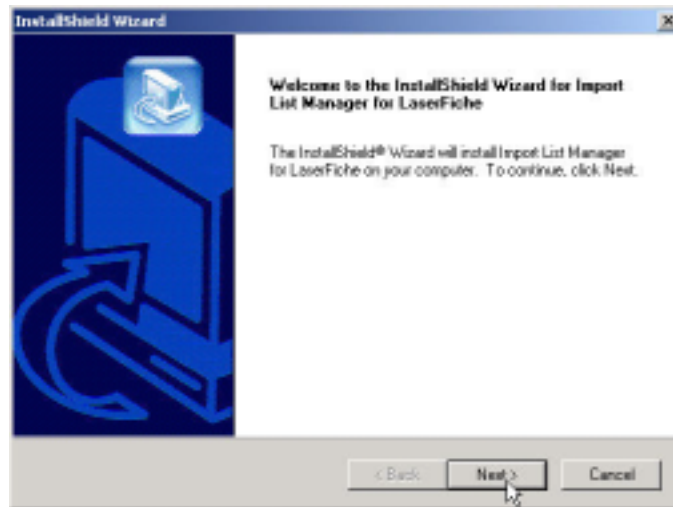


Bluelake Import List Manager

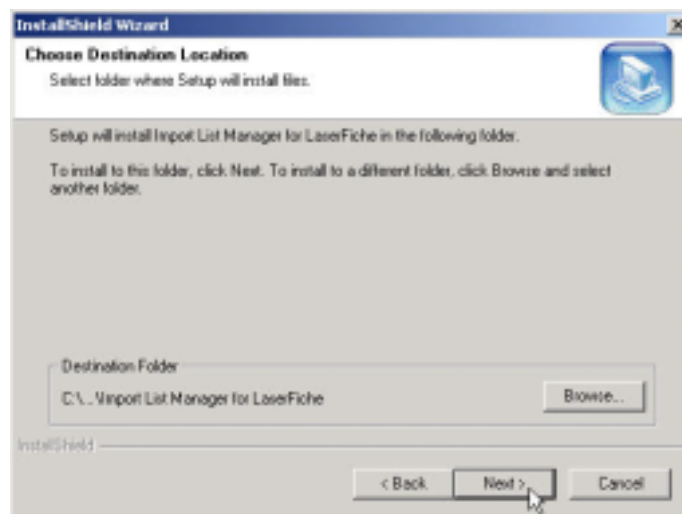
The Import List Manager is designed to run unattended and monitor multiple locations for LST files. Once LST files appear, they are processed and all template data and related image files are imported into LaserFiche. User interface allows user to specify multiple locations, each of which can be directed into separate LaserFiche folders. The Import List Manager uses LaserFiche's API to connect to LaserFiche and to import files into LaserFiche. It requires an available Full User License on the LaserFiche Server to operate.

Installation

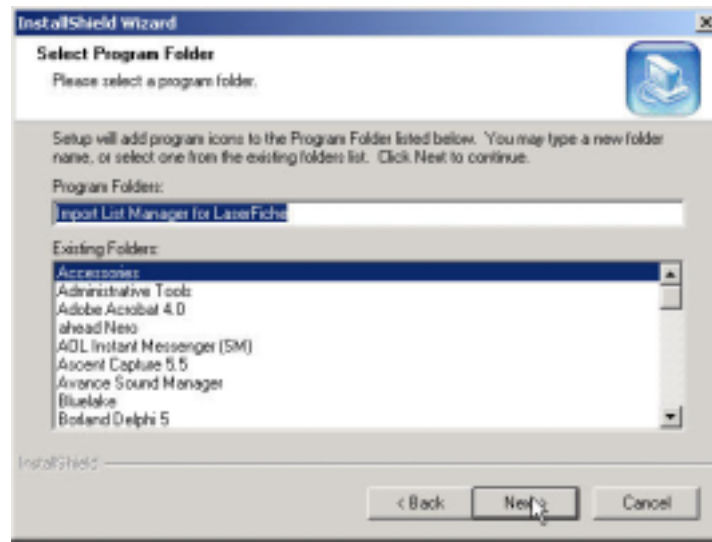
Run setup file. This should be called ImportListManagerInstall.exe. Once you run setup the following screen should appear. You will press next.



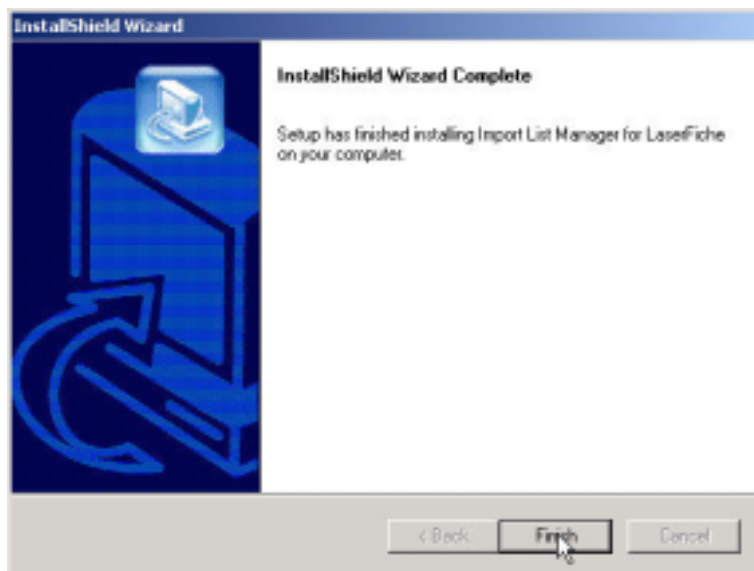
When the setup asks for a location for program files, accept the default. Press next.



Then it asks for a program folder, accept the default. Press next.



The "InstallShield Wizard Complete" screen is shown. Then press Finish.

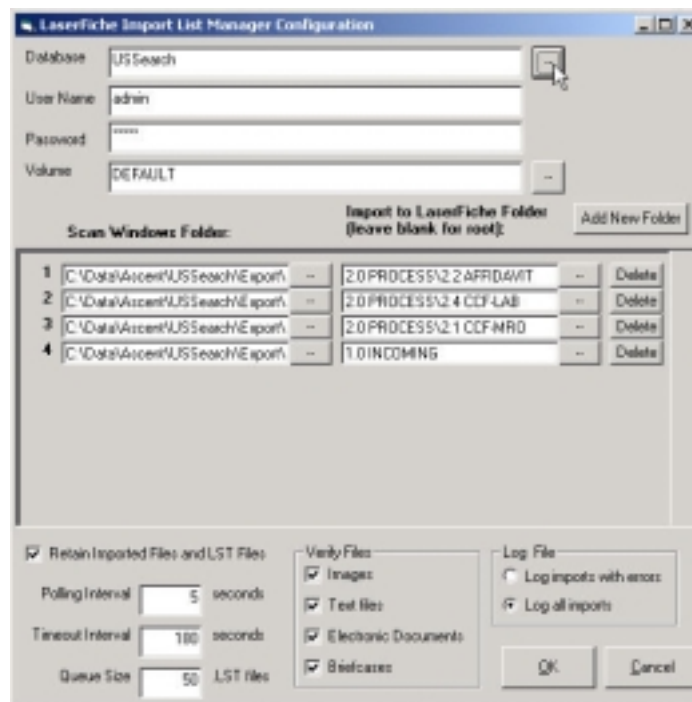
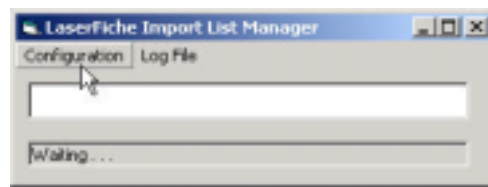


Configuring

Once you have installed the Import List Manager, you will need to configure the application in order to establish which locations in the file system should be monitored for LST files to process. The Import List Manager can monitor several locations and can forward files from each location into separate LaserFiche folders. This way, the agent can direct different files into different folders. There are two ways you can configure the Import List Manager. The primary method is through the program's configuration interface. The entries made in the configuration screen are recorded in an INI file. Some aspects of the INI file can be edited by hand.

Interface


When you first launch Import List Manager, the main screen appears. Normally, this screen will be visible on the system running the application. Before the Import List Manager can import files into LaserFiche, you will need to configure the software with the settings it needs to find files for processing and on how it should handle the files it finds. To configure the Import List Manager, click on the Configuration Menu.

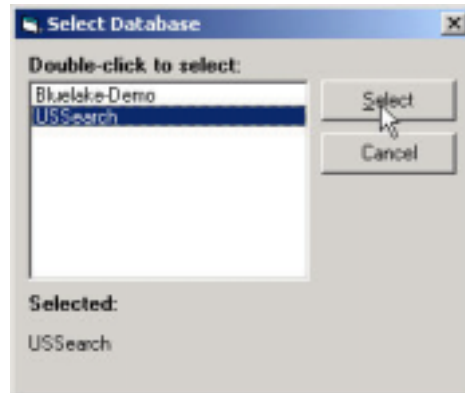


The LaserFiche Import List Manager Configuration screen is where you establish all configuration information for the Import List Manager.

Database

The select database screen allows you to choose a LaserFiche Database.

If you know the name of your LaserFiche Database, you can enter it here directly. To find the available LaserFiche databases, hit the  button.




User Name

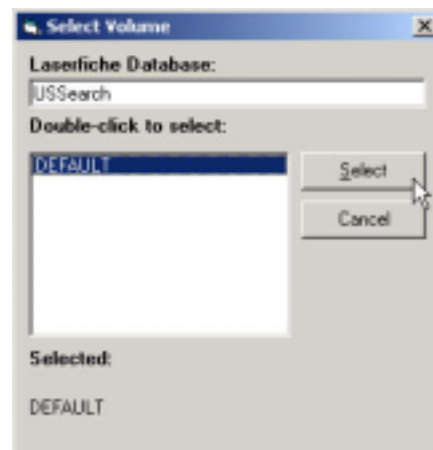
Enter a LaserFiche username of a current account. Be sure that the user account has sufficient rights to create files. A good suggestion is to create an account especially for Import Agent to use and give it a name like ImportAgent. This will allow LaserFiche's administration tools to list current logged in users to show a meaningful username in its list.

Password

This is the password for the username listed above.

Volume

This allows you to enter a LaserFiche Volume name for the files to be imported into. To find the available LaserFiche Volumes, hit the  button.

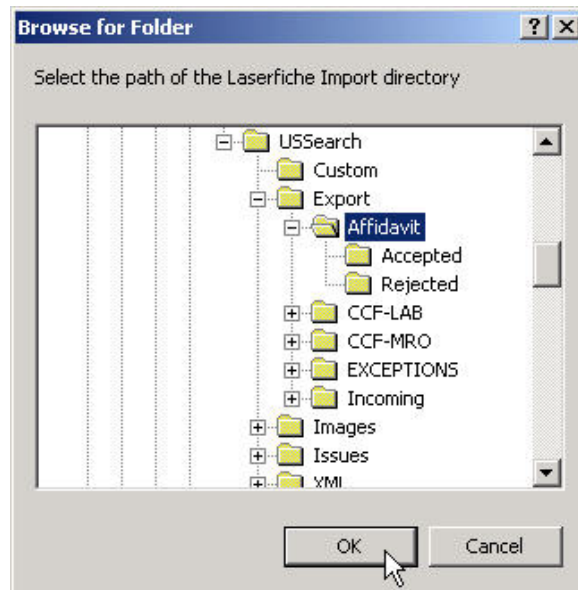


Add New Folder


This creates a new folder location to use for defining a relationship between a file system folder for source documents and a LaserFiche folder for destination. Initially the definition is empty. You will then need to specify the Scan Windows Folder and Import to LaserFiche Folder settings to complete the entry.

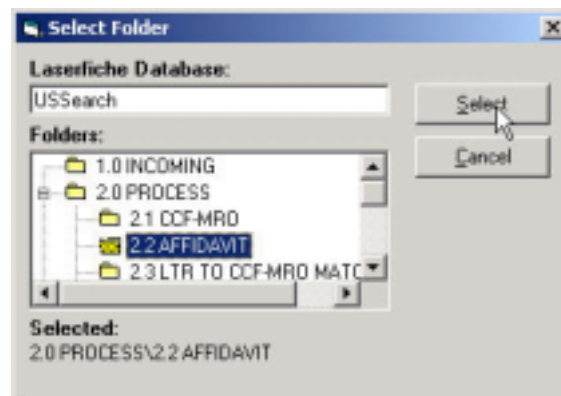
Scan Windows Folder

This allows you to enter any valid locally mapped or UNC path as your source for documents. You can enter this directly or press the  button to navigate to the desired folder.



Import to LaserFiche Folder

Specify the destination LaserFiche Folder for imported files. This can be expressed as a valid LaserFiche path. For example: 2.0 PROCESS\2.2 AFFIDAVIT. By leaving this field empty, files will be imported into the LaserFiche root folder. You can enter this path directly or press the  button to navigate to the desired LaserFiche folder.



Retain Imported Files and LST Files

This option allows you to keep copies of all files imported into LaserFiche. By default, the Import List Agent will create an Accepted and Rejected directory for every folder you specify in the file system. These directory entries are created underneath each Windows folder you specify for import. With this option selected, all imported files are stored after processing. With the option left unchecked, only rejected files are kept.

Polling Interval

The polling interval allows you to establish the duration of time in seconds between attempts to look for incoming files in the source folders. Import List Manager looks for LST files and then checks for the existence of the image files specified within the LST file. If both exist it initiates an import of the LST file. If one or the other, BUT NOT BOTH exist, the Import List Manager will bypass processing of the current LST file and go on to the next one where all components are found. For a related option, see Timeout Interval.

Timeout Interval

The Timeout Interval tells the Import List Manager how long to wait for the files referenced in the LST files to show up. Often, an application that creates LST files might complete writing the LST file before the TIF or other files are created or copied to the import location. If the referenced file does not show up in the specified length of time, the Import List Manager will log an error and move the LST file to the Rejected folder.

Queue Size

This value limits the total number of LST files that be processed any single queue before moving on to the other queues specified in the configuration. This provides for some load balancing, so that queues with potentially high volume will not prevent other queues from being processed. Once the Import List Manager cycles through the other queues it will come back to the queue with remaining files.

Verify Files

These selections work in conjunction with the Timeout Interval setting and allow you to select or de-select the types of files the Import List Manager will process. The four selections are Images, Text Files, Electronic Documents and Briefcases.

The Import List Manager can import several types of files. Image Files include the standard TIFF files. These are common for devices like fax servers, digital copiers and several image processing applications like Kofax Ascent Capture and other scanning applications. Print drivers like LaserFiche Snapshot often can create a text file in addition to an image file. This option allows Import List Manager to import OCR'ed text along with accompanying image files.

Electronic documents are any file such as MS Word or Excel. Briefcase files are a type of file LaserFiche can export containing documents and folders. This can be used to send files from one LaserFiche system to another.

And of course, LST files enable the Import List Manager to import TIFF images along with associated index information.

Log File

You can elect to log all imports or to log only those imports with errors. The Import List Manager creates a log file accessible from the menu. If the option to "log all imports" is selected, at least one entry will be written to the log file for each imported file. Otherwise only failures are recorded in the log file.

INI file

Import List Manager stores all configurations values in an INI file. The standard location and name for the file is C:\WINNT\LFImpMgr.ini. The format of the INI file is:

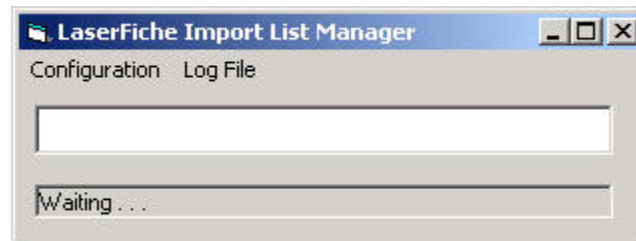
```
[Configuration]
Database=USSearch
User Name=admin
Password=%r&#b:2],†••QD'MŸCE,}0x†|>{a€l™r"Y>m^F%ob>
Timeout=180
Log All=True
Queue Size=50
Import Paths=4
Volume=DEFAULT
Delete Imported Files=False
Polling=5
[Import Path #1]
Scan Folder=C:\Data\Ascent\USSearch\Export\Affidavit
LF Folder=2.0 PROCESS\2.2 AFFIDAVIT
[Import Path #2]
Scan Folder=C:\Data\Ascent\USSearch\Export\CCF-LAB
LF Folder=2.0 PROCESS\2.4 CCF-LAB
[Import Path #3]
Scan Folder=C:\Data\Ascent\USSearch\Export\CCF-MRO
LF Folder=2.0 PROCESS\2.1 CCF-MRO
[Import Path #4]
Scan Folder=C:\Data\Ascent\USSearch\Export\EXCEPTIONS
LF Folder=1.0 INCOMING
[Import Path #5]
Scan Folder=
LF Folder=
[Verification]
Images=True
Text Files=True
Electronic Documents=True
Briefcases=True
```

Running the Import List Manager Application

Starting the application

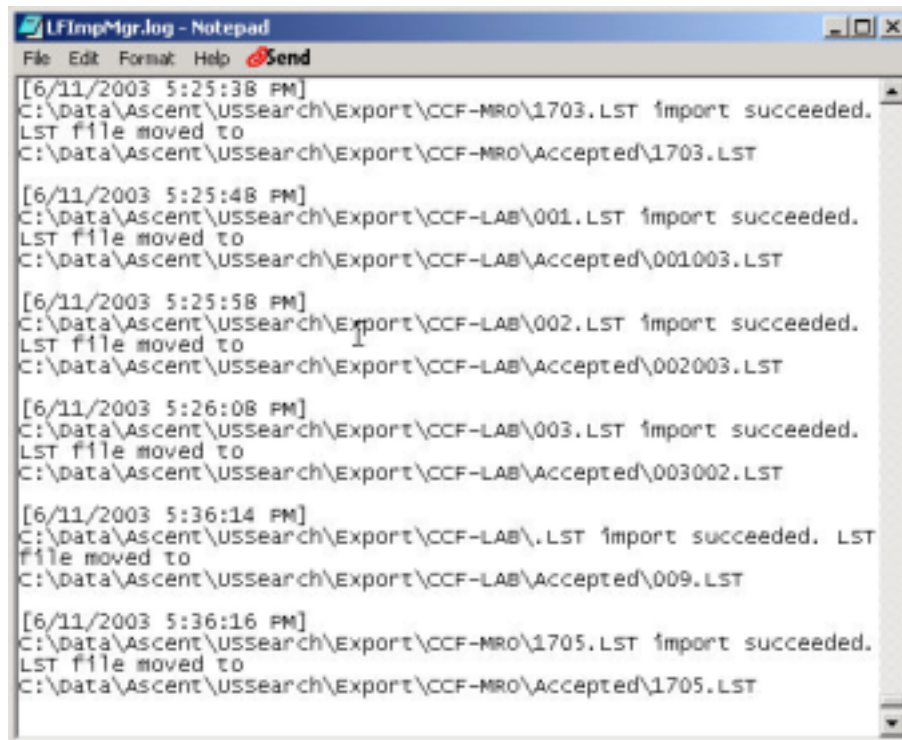
The Import List Manager places a shortcut to the program on the desktop and under the Programs in the startup menu. Once the program is launched, the main interface appears.

As soon as the Import List Manager begins processing files the status bar will change from Waiting... and will display each file name as it is processed.

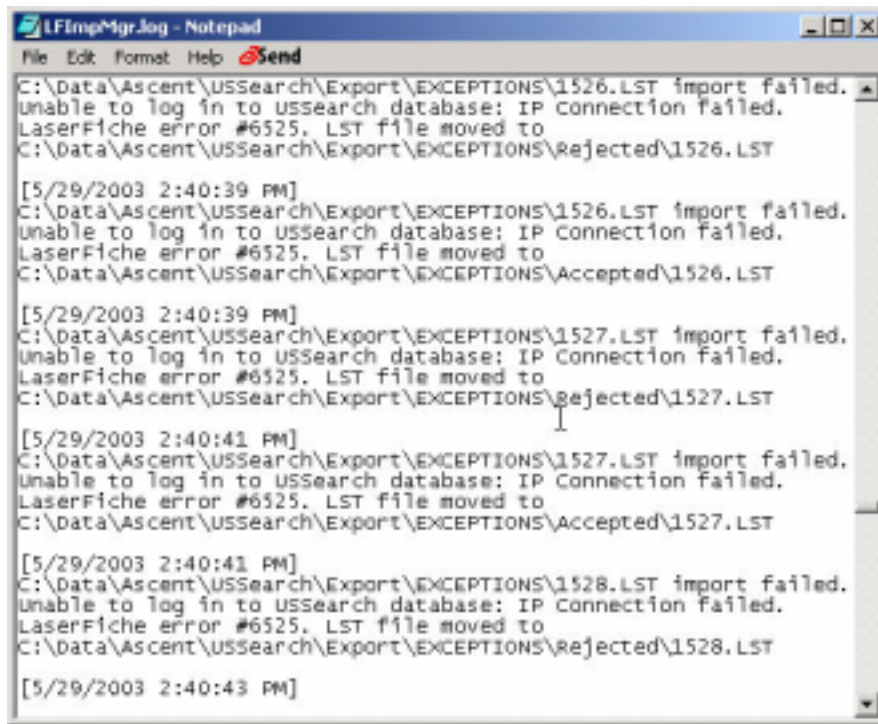


Monitoring the Application Log File

To view the log file select Log file from the menu. Notepad will launch in the taskbar as shown below (example has "include all imports" selected as the Log File option):



Failures will be listed as follows:



```
LFImpMgr.log - Notepad
File Edit Format Help Send
C:\Data\Ascent\USSearch\Export\EXCEPTIONS\1526.LST import failed.
Unable to log in to USSearch database: IP Connection failed.
LaserFiche error #6525. LST file moved to
C:\Data\Ascent\USSearch\Export\EXCEPTIONS\Rejected\1526.LST

[5/29/2003 2:40:39 PM]
C:\Data\Ascent\USSearch\Export\EXCEPTIONS\1526.LST import failed.
Unable to log in to USSearch database: IP Connection failed.
LaserFiche error #6525. LST file moved to
C:\Data\Ascent\USSearch\Export\EXCEPTIONS\Accepted\1526.LST

[5/29/2003 2:40:39 PM]
C:\Data\Ascent\USSearch\Export\EXCEPTIONS\1527.LST import failed.
Unable to log in to USSearch database: IP Connection failed.
LaserFiche error #6525. LST file moved to
C:\Data\Ascent\USSearch\Export\EXCEPTIONS\Rejected\1527.LST

[5/29/2003 2:40:41 PM]
C:\Data\Ascent\USSearch\Export\EXCEPTIONS\1527.LST import failed.
Unable to log in to USSearch database: IP Connection failed.
LaserFiche error #6525. LST file moved to
C:\Data\Ascent\USSearch\Export\EXCEPTIONS\Accepted\1527.LST

[5/29/2003 2:40:41 PM]
C:\Data\Ascent\USSearch\Export\EXCEPTIONS\1528.LST import failed.
Unable to log in to USSearch database: IP Connection failed.
LaserFiche error #6525. LST file moved to
C:\Data\Ascent\USSearch\Export\EXCEPTIONS\Rejected\1528.LST

[5/29/2003 2:40:43 PM]
```

You can find the log file at C:\Program Files\Bluelake Software\Import List Manager (or an alternate install location if selected). The file name is LFImpMgr.log.