

# Importer Pro User's Guide

*A guide for using  
Importer Pro*

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# **FileBound Importer Pro User's Guide**

## **Abstract**

This book explains how to get started with the FileBound Importer Pro. It explains the basic concepts and procedures you need to know to work with the FileBound Importer Pro.

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## About This Guide

### What's in this guide?

This guide explains the important concepts, features and various tasks that you can perform with FileBound Importer Pro.

### Intended Audience

This guide is intended for FileBound users who want to use the powerful features of Importer Pro to add new files and documents to FileBound or update existing information.

### How to use this guide?

This guide is organized as follows:

Chapter / Appendix	Description
Introduction to Importer Pro	This chapter provides a brief introduction to Importer Pro, focusing on features and advantages of using the application.
Minimum Requirements	This chapter outlines the minimum software requirements for installing and running Importer Pro.
Starting Importer Pro	This chapter outlines how to start Importer Pro.
Overview of the Features in Importer Pro	This chapter provides an overview of various features available in Importer Pro.
Configuring the Importer Pro Settings	This chapter discusses how to configure Importer Pro settings.
Working with Chain Configuration	This chapter discusses how you can configure and manage chains.

## About this Guide

How to use this guide?

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Chapter / Appendix	Description
Executing the Process	This chapter provides understanding on running import processes.
Working with the Modules	This chapter discusses how to configure and manage each module.
Importing Unindexed Documents to FileBound	This chapter discusses how to import unindexed documents to FileBound.

### *Conventions used in this guide*

- The FileBound Importer Pro interface element labels appear in bold. For example, **Global Settings** menu option.

### *Related resources*

The following reading material may be referred for a complete understanding of FileBound Importer Pro:

- FileBound Users' Guide
- FileBound Administrator's Guide

## *Send us your comments*

Send us your comments on the FileBound Importer Pro Users' Guide.

Marex Group, Inc. welcomes your comments and suggestions on the quality and usefulness of this publication. Your feedback is an important part of the information used for updating documentation. Please send us your input regarding any of the following:

- Did you find any errors?
- Is the information clear?
- Do you need more information?
- If more information is required, where should it be added?
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If you find any errors or have any other suggestions to improve the quality of this publication, please indicate the chapter, section, and page number (if available).

You can submit comments to us in the following ways:

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## *How to print this guide?*

This guide is optimized for printing on **Statement** page size (5.5 inches by 8.5 inches). If you would like to print on any other page size, select the 'Fit to Page' check box in the **Print** window before you print this guide.

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## Minimum Requirements

To install and run FileBound Importer Pro successfully, the following minimum requirements must be met:

- Operating System
  - Microsoft Windows Server 2003 or later
  - 32-bit or 64 bit
- Memory
  - Minimum 2GB required

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## What's New In This Version

Here are the latest new features in FileBound Importer Pro 5.7.4.1.

### New Features

- **No New Features Added**  
No new features were added to Importer Pro for this release.

### Issues Fixed

- Fixed a memory leak that occurred when processing multiple large .CSV files within the same configuration when running as an application, scheduled task or as a service.
- Fixed a memory leak that occurred when processing large .CSV files with multiple configurations when running as an application, scheduled task or as a service.

## Licensing FileBound Importer Pro

For FileBound Importer Pro to function properly the application needs to be licensed. There are two components that will need to be licensed, the Importer Pro application and the OCR/Screen Scraping Module.

While running in demo mode Importer Pro will only allow an upload of 25 files, 50 documents and 25 barcode reads. Restarting the application will reset the counter for the limits. and let you use the application again until the limits are reached. While in demo mode you will not be able to perform OCR or use the Auto-Import Service.

Perform the following steps to license the application.

1. Start FileBound Importer Pro
2. Click **Settings** in the toolbar
3. Within the Global Settings tab click **Licensing** at the bottom of the window, the FileBound License Manager will be displayed.
4. Select **Importer Professional Pack**, click **License** at the bottom of the window
5. Enter the **License Code** supplied to you, click **OK**
6. Select , click **License** at the bottom of the window
7. Enter the **License Code** supplied to you, click **OK**
8. Click **Close** to close the FileBound License Manager

The application will now show that it is licensed in the right-hand side of the application status bar, this includes OCR.

## Introduction To Importer Pro

Importer Pro is a FileBound product for importing documents, images, and data files to a FileBound server. Importer Pro can be set up with multiple configurations that can import from multiple sources to multiple FileBound servers. The configuration files contain information within modules that are run based on a schedule that can be set or run manually. The modules to be run can be configured individually.

Importer Pro can be set up to monitor folders for incoming files. For example, fax files or image files can be automatically uploaded to a FileBound server, unattended. Scripting modules can be configured to validate and manipulate data contained in the incoming files, before the files are imported to a FileBound server.

Importer Pro can be used to process and import ERM data taking large print spool files and other text file formats, apply breaking and splitting rules and then import the processed information into a FileBound server.

## Starting Importer Pro

You can access Importer Pro features from more than one location. This gives you flexibility to work from multiple locations within the Microsoft Windows environment.

- Perform the following steps to access Importer Pro from the 'Start' menu:
  - i. Select the **FileBound** menu option from the programs menu of Microsoft Windows.
  - ii. Select the **Importer Pro** menu option.  
Importer Pro window opens.
- Alternatively, double-click the Importer Pro shortcut from the desktop.

## Overview Of Importer Pro

The following basic tasks need to be performed within Importer Pro to import documents, images, and data files to FileBound:

1. Configure Importer Pro Settings
2. Use Template or Wizard to create Configuration Files
3. Configure Modules
4. Starting or Stopping Process Execution

## Theory of Configuration Operation

The configuration file that is created consists of modules that are oriented in a "chain" and displayed within the **Configure** tab of FileBound Importer Pro. This configuration format allows functions to be performed in a specified order that is defined by the order of the modules in the configuration from the top down.

When the configuration is started and executed the application will start with the first module in the list or "chain". When that module is complete then the next module is executed. The next module can utilize information that was obtained or specified by a previous module or modules.

At any time during the life of a configuration the list of modules can be edited by adding additional modules or removing unneeded modules when the application is running in Power User mode. You will need to keep in mind that some modules are necessary for the configuration to operate as expected.

## The Basic Configuration Process

When creating and executing a new import process there are a few basic steps that will always need to occur:

1. Create the Configuration File using a Wizard or Template
2. Alter the default settings of any modules if necessary
3. Add any new additional modules to the configuration if needed
4. Start the Import Process

5. Monitor the Execution Log (Optional)
6. Stop the Import Process

## The Basic Tasks

The basic tasks are discussed briefly as follows:

1. Configuring Importer Pro Settings

You can configure **Run** settings and **Global** settings for Importer Pro.

You can specify the following in **Run** settings:

- i. If configuration files are executed automatically started when the application is opened
- ii. A time interval for import cycles to be executed
- iii. Detail level of log messages
- iv. Displaying or hiding the global **Run** toolbar
- v. To provide a Debug Mode within the Configuration Area
- vi. To enable Power User Mode to enhance configuration options

You can specify the following **Global** settings:

- i. The system chain paths
2. Using Wizards for Configuration File Creation
    - i. CSV Wizard
    - ii. Basic Image Import
    - iii. Barcode

3. Adding Templates for Chain Configuration

You can select from several available templates including:

- i. Simple CSV (Standard template)
- ii. Simple Image (Standard template)
- iii. Barcode Sheets (Standard template)
- iv. Advanced Barcoding Options

- v. ERM Data
- vi. XML Data Sets
- vii. Blank Template
- viii. Custom Template

#### 4. Adding and Configuring Modules

When the Power User Mode is enabled you can add modules by choosing the module type from a list of available module types. When you add a template a default configuration of selected modules is provided. You can modify the configuration according to your import process requirements.

**Note: Note:** *The sequence and hierarchy of the position where the module is added in the chain is very important.*

#### 5. Starting or Stopping Process Execution

You can run one or more selected import processes manually or automatically. Import processes can be run automatically between a set time interval and also when Importer Pro starts. You can stop a running import process manually, before or after the import process is completed.

#### 6. Auto-Import Service

Importer Pro can be configured to use an Auto-Import service that will detect when a new item has been placed in a monitored directory. Once a new item is detected it will automatically be imported. This type of monitoring does not rely on a time imported schedule.

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## Configuring Importer Pro

You can configure the main application settings for Importer Pro according to your requirements. The Importer Pro settings are grouped into the 'Global' settings and the 'Run' settings.

### Configuring Global Settings

You can create a configuration from a template and add modules to the configuration according to the import requirements. You may have modules required for a specific import process, grouped together in a specific configuration. You can have any number of configurations.

#### Accessing the Global Settings Dialog

Perform the following steps to access the **Global Settings** dialog:

1. Click on the Importer Pro menu bar.
2. Click the **Global Settings** tab.

#### Adding a System Chain Path

A system chain path is not always necessary. Importer Pro will always look at the applications default install location for the available modules that can be used within a configuration file. In specialized installations additional modules may be created and be located in a different location than the default location. Specifying this location within the **System Chain Paths** box will allow Importer Pro to have access to these additional modules.

Perform the following steps to add a 'system chain path':

1. Click in the **Global Settings** dialog to add a 'System Chain Path'.  
The 'Browse for Folder' dialog opens.
2. Select the folder to add for 'system chain path'.
3. Click **OK**.

## Editing a System Chain path

Perform the following steps to edit a 'system chain path':

1. Select a system chain path from the list of added system chain paths in the **Global Settings** dialog.
2. Click to add a 'system chain path'.  
The 'Browse for Folder' dialog opens.
3. Select the folder to add for 'system chain path'.
4. Click **OK**.

## Removing a System Chain Path

Perform the following steps to remove an added 'system chain path':

1. Select a system chain path from the list of added system chain paths in the **Global Settings** dialog.
2. Click to remove a 'system chain path' from the list of added system chain paths in the **Global Settings** dialog.  
The 'system chain path' is removed after confirmation.

## Licensing the Application

Clicking on the Licensing button will launch the Filebound License Manager Utility. For more information on licensing the application see "Licensing FileBound Importer Pro" on page 8.

## Configuring Run Settings

You can change the way Importer Pro runs and logs messages from **Run Settings**.

Perform the following steps to access the **Run Settings** dialog:

1. Click on the Importer Pro menu bar.

2. Click the **Run Settings** tab.
3. You can select the **Auto-Start** check box to run selected configurations when Importer Pro starts.
4. Specify the time interval in number of minutes in the **Minutes** box for Importer Pro to wait between running import processes. This does not need to be selected if the configuration is set to run as a scheduled task.

**Note: Note:** *The time interval setting is applied when you restart Importer Pro. The default time interval is 5 minutes.*

5. Select if **Verbose Logging** should be used to report detailed log messages. A log for each new day will be created and located at C:\Program Files\FileBound\ImporterPro\logs. The log will be named with the date that it was created.
6. Select the **Global Tool Bar** check box to show or hide the **Start** and the **Stop** button on the Importer Pro menu bar.
7. Select whether the **Debug Mode** button should be enabled. When enabled the **Debug** button will be displayed within the button bar when working with a configuration. This button is useful to step through configurations that are causing problems.
8. Select whether the **Power User Mode** should be enabled. When enabled the **Module Organization** will be displayed within the button bar and right-click menu option when working with a configuration file. These buttons are used to organize modules within a configuration.

## Configuring Auto-Import Service Settings

You can change the way Importer Pro monitors and imports from within the **Auto-Import Service Settings** tab. When the Auto-Import Service is installed Importer Pro will not need to be open and running for importing operations to be performed. When the service is started it will monitor all locations that are specified in the activated configuration list. When Importer Pro detects that a new item has been placed in the monitored directory it will automatically be imported. There will be no waiting for a cycle timer to execute the configuration.

## Configuring Importer Pro

### Configuring Auto-Import Service Settings

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Perform the following steps to access the **Auto-Import Service Settings** dialog:

1. Click on the Importer Pro menu bar.
  1. Click the **Auto-Import Service** tab.
  2. You can select to Install the Auto-Import Service by clicking the **Install** button, after installation the status message will change to **Installed**.
  3. To start the service click the **Start** button. A service will now be running using the Service Name specified within the **Service Name** field. The status message will indicate if the service is running or not.
  4. The name of the service can be changed from the default FBChain to anything you would like within the **Service Name** field. This name change will need to be performed before the service is installed.

**Note: Note:** *If the service has been installed and you would like to change the name of the service, click the Uninstall Service button. Then enter the new service name and reinstall the service.*

5. Select if **Verbose Logging** should be used for the Auto-Import Service activities. The log for this will be located at C:\Program Files\FileBound\ImporterPro\FileWatchService.log

## Using Importer Pro Wizards

Importer Pro provides wizards to help speed up and simplify the basic setup of three of the most common types of imports that are performed by Importer Pro, CSV imports and Image Only imports.

When using the wizards users will be asked to answer a series of questions that will then handle the setup of the chain configuration modules. A configuration can remain in the wizard mode as long as is needed by a user.

The user will have the ability to convert the wizard to an "Advanced" configuration. When the configuration is converted from "Wizard" mode to "Advanced" mode the user will be able to add extra functionality to the configuration that was not allowed when using it in wizard mode. An advanced mode configuration is the same type of configuration that is created when using the Importer Pro templates to create a configuration.

## Starting a New Wizard Configuration

New configurations can be added to Importer Pro when the application is not performing any imports. To start a new Wizard Configuration perform the following steps:

1. Click to open the **Available Templates** window
2. Select the type of wizard to use
  
3. Click **OK**
4. Specify a **Name** for the configuration, then click **Save**

## Using the CSV Wizard

The CSV Wizard provides users with a quick and simple interface to setup the import of CSV files that are imported to a FileBound server from one directory location. You will also have the ability to select a backup location to store the imported files before they are removed from the import directory. If additional options are needed for the import setup the configuration file that is created can be converted to an "Advanced Configuration".

After selecting to use the CSV Wizard you will be prompted with seven different screens that will help you setup the CSV import. These seven steps include:

- Step 1: Select a FileBound Server
- Step 2: Select a FileBound Project
- Step 3: Select a Folder (Directory) to Monitor
- Step 4: Select a Location to Backup Imported Files
- Step 5: Index Field Mapping to CSV Columns
- Step 6: Select OCR Properties
- Step 7: Setting Find and Update Conditions
- Step 8: Settings Confirmation

## Step 1: Select FileBound Server and Login

### Web Connection Method

Select a FileBound server that all the imported files and documents will be imported to.

1. Enter the **Server URL** for the FileBound server that the imports will be sent to
2. Enter a **Username** for the selected FileBound site
3. Enter a **Password** for the selected Username
4. Click **Next**
5. Enter a FileBound Connection String within the **Connection** field instead of the Server URL to make a direct database connection. This is an optional step.

### Direct Database Connection Method

The Direct Database Connection Method can only be used when importing information to an On-Site FileBound installation. This cannot be performed when connecting to a FileBound On-Demand site.

1. Enter a **Username** for the desired FileBound site
2. Enter a **Password** for the desired Username
3. Within the **Connection** field enter the database connection string
4. Click **Next**

#### Example Connection String:

```
Persist Security Info=True;Initial Catalog=fbdoc54;Data Source=ACMESERVERNAME\FILEBOUNDV5;User ID=sa;Password=filebound;
```

**Note: NOTE:** The connection string information can be found within the *web.config* file that is located on the FileBound web server. The default location for this file is *C:\inetpub\w5\web.config*.

## *Step 2: Select a FileBound Project*

Select a project. The data will be added/edited within this project during the import. If no projects are listed, click the Previous at the bottom of the window and update the login information that was entered on the select FileBound server screen.

1. Select a project from the drop down list
2. Click **Next**

### *Step 3: Select a Folder to Monitor*

Select a folder to monitor for files. This is the location that Importer Pro will be monitoring for new files to import.

1. Click the **Browse** icon,
2. Navigate to the desired location, click **OK**
3. Click **Next**

### *Step 4: Backup Files (Optional)*

This step is optional and does not have to be performed if you do not need to have the imported files backed up to another location after the import into FileBound. Select a location to backup the imported files. You can also select to overwrite any existing files that might exist in the backup location when they are copied.

1. Click the **Browse** icon,
2. Navigate to the desired location, click **OK**
3. **(Optional)** Select to Overwrite existing files that exist in the specified backup location.
4. Click **Next**

## *Step 5: Index Field Mapping*

Select a sample .csv file that contains the information to be imported. Once the file is selected you will be able to map the columns of the CSV file to the appropriate FileBound index fields, dividers, and document pointers.

1. Click the **Browse** icon, to select the sample file, click **OK**
2. Select a column in the .csv mapping area
3. Select an **Index Field** from the **Assign As** drop-down menu to map the selected column to
4. Repeat steps 2 and 3 for all desired index fields
5. Select the .csv column to be used for the Divider, select **Document Divider** from the **Assign As** drop-down menu
6. Select the .csv column to that specifies the corresponding image location, select **Document Value (Location)** from the **Assign As** drop-down menu
7. Click **Next**

## *Step 6: Select OCR Properties (Optional)*

Optical Character Recognition can be performed on documents during the upload process to FileBound. When documents are OCR'd information about the location of the OCR'd words can be stored within the FileBound database to allow the word to be highlighted when searched for within FileBound.

1. Select the **Perform OCR** option to enable OCR during the upload process.
2. Select **Enable Word Highlighting on Page** to store location information about OCR'd words.

## *Step 7: Find and Update*

Select any fields that should be used to match on during the import. When a file exists selected fields can be updated.

1. Highlight a field Importer Pro should use to search in FileBound for an existing file, click to move that field to the **Find** Window
2. Repeat Step 1 as necessary to look for a combination of fields
3. Highlight a field Importer Pro should update when an existing file is found, click to move that field to the **Update** Window
4. Repeat Step 3 as necessary to update multiple fields
5. Click **Next**

## *Step 8: Wizard Complete*

The wizard is now complete and ready to use. There is no further configuration that needs to occur. If additional configuration options are needed the configuration can be converted to an "Advanced" configuration type.

To run the configuration click **Start** in the **Toolbar**.

**Note: Note:** *Once the configuration is converted to an Advanced Configuration type you will not be able to access it within the wizard mode.*

## Using the Image Wizard

The Image Wizard provides users with a quick and simple interface to setup an import of image files within no kind of indexing file associated with them. These images files will be imported to a FileBound server from one directory location. You will also have the ability to select a backup location to store the imported files before they are removed from the import directory. If additional options are needed for the import setup the configuration file that is created can be converted to an "Advanced Configuration".

After selecting to use the Image Wizard you will be prompted with six different screens that will help you setup the image import. These six steps include:

- Step 1: Select a FileBound Server
- Step 2: Select a FileBound Project
- Step 3: Select a Folder (Directory) to Monitor
- Step 4: Select a Location to Backup Imported Files
- Step 5: Index Field Mapping
- Step 6: Settings Confirmation

## Step 1: Select FileBound Server and Login

### Web Connection Method

Select a FileBound server that all the imported files and documents will be imported to.

1. Enter the **Server URL** for the FileBound server that the imports will be sent to
2. Enter a **Username** for the selected FileBound site
3. Enter a **Password** for the selected Username
4. Click **Next**
5. Enter a FileBound Connection String within the **Connection** field instead of the Server URL to make a direct database connection. This is an optional step.

### Direct Database Connection Method

The Direct Database Connection Method can only be used when importing information to an On-Site FileBound installation. This cannot be performed when connecting to a FileBound On-Demand site.

1. Enter a **Username** for the desired FileBound site
2. Enter a **Password** for the desired Username
3. Within the **Connection** field enter the database connection string
4. Click **Next**

#### Example Connection String:

```
Persist Security Info=True;Initial Catalog=fbdoc54;Data Source=ACMESERVERNAME\FILEBOUNDV5;User ID=sa;Password=filebound;
```

**Note: NOTE:** The connection string information can be found within the `web.config` file that is located on the FileBound web server. The default location for this file is `C:\inetpub\wwwroot\web.config`.

## *Step 2: Select a FileBound Project*

Select a project. The data will be added/edited within this project during the import. If no projects are listed, click the Previous at the bottom of the window and update the login information that was entered on the select File-Bound server screen.

1. Select a project from the drop down list
2. Click **Next**

### *Step 3: Select a Folder to Monitor*

Select a folder to monitor for files. This is the location that Importer Pro will be monitoring for new files to import.

1. Click the **Browse** icon,
2. Navigate to the desired location, click **OK**
3. Enter the File Type that is to be imported, including the period
4. Click **Next**

**Note: Note:** *Place an asterisk (\*) before the extension to import all files of that type.*

### *Step 4: Backup Files (Optional)*

This step is optional and does not have to be performed if you do not need to have the imported files backed up to another location after the import into FileBound. Select a location to backup the imported files. You can also select to overwrite any existing files that might exist in the backup location when they are copied.

1. Click the **Browse** icon,
2. Navigate to the desired location, click **OK**
3. **(Optional)** Select to Overwrite existing files that exist in the specified backup location.
4. Click **Next**

## *Step 5: Index Field Mapping (Optional)*

Elements or properties of the imported file and the location that it is stored in can be used to specify file and document information with FileBound. You have the following options to use to map to the different FileBound elements:

- Full File Path  
This will enter the full file path into the selected option.  
**Example:** C:/My Documents/Imports/Image1.tiff
- File Name with Extension  
This will enter the full filename including the extension.  
**Example:** Image.tiff
- File Name Only  
This will enter just the filename into the selected option.  
**Example:** Image1
- File Name Extension Only  
This will enter just the file extension into the selected option  
**Example:** tiff

### *Step 6: Wizard Complete*

The wizard is now complete and ready to use. There is no further configuration that needs to occur. If additional configuration options are needed the configuration can be converted to an "Advanced" configuration type.

To run the configuration click **Start** in the **Toolbar**.

**Note: Note:** *Once the configuration is converted to an Advanced Configuration type you will not be able to access it within the wizard mode.*

## Using the FileBound Barcode Wizard

The FileBound Barcode Wizard provides users with a quick and simple interface to setup the import of images containing barcode information. These barcodes can be used for identifying new file information and index information that can be imported to a FileBound server from one directory location. You will also have the ability to select a backup location to store the imported files before they are removed from the import directory. If additional options are needed for the import setup the configuration file that is created can be converted to an "Advanced Configuration".

This Barcode wizard type should be used when importing documents that contain barcodes that utilize the FileBound barcode formatting of 00F00 to identify new files, 00D00 to identify new dividers and 00S00 to identify new Separators. Importer Pro supports the following barcode formats; 3 of 9, Barcode 128, UPC-A, and UPC-E. Barcodes will be read in a left to right, top to bottom order. The order that the barcodes are read will be the same order that they populate index fields in FileBound for example, first barcode read after the 00F00 will populate the first FileBound index field, the second barcode after the 00F00 will populate the second FileBound index field and so on. The wizard will guide you through the process of selecting the appropriate project and server. You will also be able to select any find and update criteria. You will not be able to map the index fields, or specify different break values.

After selecting to use the FileBound Barcode Wizard you will be prompted with seven different screens that will help you setup the CSV import. These seven steps include:

- Step 1: Select a FileBound Server
- Step 2: Select a FileBound Project
- Step 3: Select a Folder (Directory) to Monitor
- Step 4: Select a Location to Backup Imported Files
- Step 5: Select OCR Properties
- Step 6: Setting Find and Update Conditions
- Step 7: Settings Confirmation

## *Step 1: Select FileBound Server and Login*

### Web Connection Method

Select a FileBound server that all the imported files and documents will be imported to.

1. Enter the **Server URL** for the FileBound server that the imports will be sent to
2. Enter a **Username** for the selected FileBound site
3. Enter a **Password** for the selected Username
4. Click **Next**
5. Enter a FileBound Connection String within the **Connection** field instead of the Server URL to make a direct database connection. This is an optional step.

### Direct Database Connection Method

The Direct Database Connection Method can only be used when importing information to an On-Site FileBound installation. This cannot be performed when connecting to a FileBound On-Demand site.

The Direct Database Connection Method can only be used when importing information to an On-Site FileBound installation. This cannot be performed when connecting to a FileBound On-Demand site.

1. Enter a **Username** for the desired FileBound site
2. Enter a **Password** for the desired Username
3. Within the **Connection** field enter the database connection string
4. Click **Next**

#### **Example Connection String:**

```
Persist Security Info=True;Initial Catalog=fbdoc54;Data Source=ACMESERVERNAME\FILEBOUNDV5;User ID=sa;Password=filebound;
```

**Note: NOTE:** *The connection string information can be found within the web.config file that is located on the FileBound web server. The default location for this file is C:\inetpub\w5\web.config.*

## *Step 2: Select a FileBound Project*

Select a project. The data will be added/edited within this project during the import. If no projects are listed, click the Previous at the bottom of the window and update the login information that was entered on the select FileBound server screen.

1. Select a project from the drop down list
2. Click **Next**

### *Step 3: Select a Folder to Monitor*

Select a folder to monitor for files. This is the location that Importer Pro will be monitoring for new files to import. You will also need to select the file type that will be imported.

1. Click the **Browse** icon,
2. Navigate to the desired location, click **OK**
3. Click **Next**
4. **Enter the File Type** extension that will be imported. Entering \* will import all file types.

#### *Step 4: Backup Files (Optional)*

This step is optional and does not have to be performed if you do not need to have the imported files backed up to another location after the import into FileBound. Select a location to backup the imported files. You can also select to overwrite any existing files that might exist in the backup location when they are copied.

1. Click the **Browse** icon,
2. Navigate to the desired location, click **OK**
3. **(Optional)** Select to Overwrite existing files that exist in the specified backup location.
4. Click **Next**

## *Step 6: Select OCR Properties (Optional)*

Optical Character Recognition can be performed on documents during the upload process to FileBound. When documents are OCR'd information about the location of the OCR'd words can be stored within the FileBound database to allow the word to be highlighted when searched for within FileBound.

1. Select the **Perform OCR** option to enable OCR during the upload process.
2. Select **Enable Word Highlighting on Page** to store location information about OCR'd words.

## *Step 7: Find and Update*

Select any fields that should be used to match on during the import. When a file exists selected fields can be updated.

1. Highlight a field Importer Pro should use to search in FileBound for an existing file, click to move that field to the **Find** Window
2. Repeat Step 1 as necessary to look for a combination of fields
3. Highlight a field Importer Pro should update when an existing file is found, click to move that field to the **Update** Window
4. Repeat Step 3 as necessary to update multiple fields
5. Click **Next**

## *Step 8: Wizard Complete*

The wizard is now complete and ready to use. There is no further configuration that needs to occur. If additional configuration options are needed the configuration can be converted to an "Advanced" configuration type.

To run the configuration click **Start** in the **Toolbar**.

**Note: Note:** *Once the configuration is converted to an Advanced Configuration type you will not be able to access it within the wizard mode.*

## Using the Generic Barcode Wizard

The FileBound Barcode Wizard provides users with a quick and simple interface to setup the import of images containing barcode information. These barcodes can be used for identifying new file information and index information that can be imported to a FileBound server from one directory location. You will also have the ability to select a backup location to store the imported files before they are removed from the import directory. If additional options are needed for the import setup the configuration file that is created can be converted to an "Advanced Configuration".

This Barcode wizard type should be used when it is necessary to specify specific breaking values and configure index field mapping when using barcodes. Importer Pro supports the following barcode formats; 3 of 9, Barcode 128, UPC-A, and UPC-E. Barcodes will be read in a left to right, top to bottom order. You will be able to configure which barcode will populate which index field within FileBound. The wizard will guide you through the process of selecting the appropriate server, project, and index field mapping. You will be able to select any find and update criteria and specify break values.

After selecting to use the FileBound Barcode Wizard you will be prompted with nine different screens that will help you setup the CSV import. These nine steps include:

- Step 1: Select a FileBound Server
- Step 2: Select a FileBound Project
- Step 3: Select a Folder (Directory) to Monitor
- Step 4: Select a Location to Backup Imported Files
- Step 5: Select the Type of Barcode format to be imported
- Step 6: Map Barcodes to Index Fields
- Step 7: Select OCR Properties
- Step 8: Setting Find and Update Conditions
- Step 9: Settings Confirmation

## *Step 1: Select FileBound Server and Login*

### Web Connection Method

Select a FileBound server that all the imported files and documents will be imported to.

1. Enter the **Server URL** for the FileBound server that the imports will be sent to
2. Enter a **Username** for the selected FileBound site
3. Enter a **Password** for the selected Username
4. Click **Next**
5. Enter a FileBound Connection String within the **Connection** field instead of the Server URL to make a direct database connection. This is an optional step.

### Direct Database Connection Method

The Direct Database Connection Method can only be used when importing information to an On-Site FileBound installation. This cannot be performed when connecting to a FileBound On-Demand site.

The Direct Database Connection Method can only be used when importing information to an On-Site FileBound installation. This cannot be performed when connecting to a FileBound On-Demand site.

1. Enter a **Username** for the desired FileBound site
2. Enter a **Password** for the desired Username
3. Within the **Connection** field enter the database connection string
4. Click **Next**

#### **Example Connection String:**

```
Persist Security Info=True;Initial Catalog=fbdoc54;Data Source=ACMESERVERNAME\FILEBOUNDV5;User ID=sa;Password=filebound;
```

## Using Importer Pro Wizards

### Using the Generic Barcode Wizard

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**Note: NOTE:** *The connection string information can be found within the web.config file that is located on the FileBound web server. The default location for this file is C:\inetpub\wwwroot\web.config.*

## *Step 2: Select a FileBound Project*

Select a project. The data will be added/edited within this project during the import. If no projects are listed, click the Previous at the bottom of the window and update the login information that was entered on the select FileBound server screen.

1. Select a project from the drop down list
2. Click **Next**

### *Step 3: Select a Folder to Monitor*

Select a folder to monitor for files. This is the location that Importer Pro will be monitoring for new files to import. You will also need to select the file type that will be imported.

1. Click the **Browse** icon,
2. Navigate to the desired location, click **OK**
3. Click **Next**
4. **Enter the File Type** extension that will be imported. Entering \* will import all file types.

### *Step 4: Backup Files (Optional)*

This step is optional and does not have to be performed if you do not need to have the imported files backed up to another location after the import into FileBound. Select a location to backup the imported files. You can also select to overwrite any existing files that might exist in the backup location when they are copied.

1. Click the **Browse** icon,
2. Navigate to the desired location, click **OK**
3. **(Optional)** Select to Overwrite existing files that exist in the specified backup location.
4. Click **Next**

## *Step 5: Select Barcode Format, Break Value*

Select the barcode format you would like to use for barcode reading. File-Bound format will automatically use the default FileBound values of 00F00, 00D00, and 00S00 to identify new files, dividers, and separators. Standard format will allow you to define any file break value. If no value is entered for the File Break Value a default value of \* will be entered allowing a break to occur on any barcode value that is detected when using the standard format.

1. Select a barcode format to use
2. If Standard type is selected, enter a value in the **File Break Value** field to indicate what value will be used to determine new files.
3. Click **Next**

## *Step 6: Barcode - Index Field Mapping*

Select a sample image file that contains barcodes to be imported. Once the file is selected you will be able to map the barcodes located on the image to the appropriate FileBound index fields, dividers, and document pointers.

1. Click the **Browse** icon, to select the **Sample File**, click **OK**
2. Next to each FileBound Index field select the appropriate barcode value to use to populate the index field.
3. Repeat Step 2 for all desired index fields
4. Click **Next**

## *Step 6: Select OCR Properties (Optional)*

Optical Character Recognition can be performed on documents during the upload process to FileBound. When documents are OCR'd information about the location of the OCR'd words can be stored within the FileBound database to allow the word to be highlighted when searched for within FileBound.

1. Select the **Perform OCR** option to enable OCR during the upload process.
2. Select **Enable Word Highlighting on Page** to store location information about OCR'd words.

## *Step 7: Find and Update*

Select any fields that should be used to match on during the import. When a file exists selected fields can be updated.

1. Highlight a field Importer Pro should use to search in FileBound for an existing file, click to move that field to the **Find** Window
2. Repeat Step 1 as necessary to look for a combination of fields
3. Highlight a field Importer Pro should update when an existing file is found, click to move that field to the **Update** Window
4. Repeat Step 3 as necessary to update multiple fields
5. Click **Next**

## *Step 8: Wizard Complete*

The wizard is now complete and ready to use. There is no further configuration that needs to occur. If additional configuration options are needed the configuration can be converted to an "Advanced" configuration type.

To run the configuration click **Start** in the **Toolbar**.

**Note: Note:** *Once the configuration is converted to an Advanced Configuration type you will not be able to access it within the wizard mode.*

## Using Importer Pro Templates

Importer Pro provides templates to provide the basic setup of common import types. Templates are located within two different areas, one for basic imports consisting of CSV files, Image Only imports and imports using FileBound barcodes the other for more advanced template configurations.

When using the templates the configuration file will be created with all of the necessary basic modules for the selected action. The user will be responsible for the setup of the configuration modules.

the user will be able to add extra functionality to the configuration by adding additional modules or rearranging the modules that was created using the template.

## Starting from a New Template

New configurations can be added to Importer Pro when the application is not performing any imports. To start from a new template perform the following steps:

1. Click to open the **Available Configuration Types** window
2. Select the type of template to use
3. Additional Templates can be accessed by clicking **Other Templates**, to return to the basic templates click on the **Basic Wizards and Templates** button.
4. Click **OK**
5. Specify a **Name** for the configuration, then click **Save**

## CSV Import Template

The CSV template should be used when importing file information that can be associated with scanned images. When setting up the template you will be able to map the CSV columns to the appropriate index fields within FileBound. You will also be able to map and specify information about the imported documents that can include divider and separator labels, and other such document related information.

## Basic Image Import Template

The Basic Image template should be used when importing documents that do not contain any indexing information. Indexing will be provided using the directory name where the image is located or other such types of information.

## FileBound Barcodes Template

This Barcode template type should be used when importing documents that contain barcodes that utilize the FileBound barcode formatting of 00F00 to identify new files, 00D00 to identify new dividers and 00S00 to identify new Separators. Barcodes will be read in a left to right, top to bottom order. The order that the barcodes are read will be the same order that they populate index fields in FileBound. For example, the first barcode read after the 00F00 will populate the first FileBound index field, the second barcode after the 00F00 will populate the second FileBound index field and so on. You will be able to select any find and update criteria. You will not be able to map the index fields, or specify different break values.

## FileBound Barcode with OCR Template

This Barcode template has the same functionality as the "FileBound Barcode" template but adds OCR capability. This template type should be used when importing documents that contain barcodes that utilize the FileBound barcode formatting of 00F00 to identify new files, 00D00 to identify new dividers and 00S00 to identify new Separators. Barcodes will be read in a left to right, top to bottom order. The order that the barcodes are read will be the same order that they populate index fields in FileBound for example, first

barcode read after the 00F00 will populate the first FileBound index field, the second barcode after the 00F00 will populate the second FileBound index field and so on. You will be able to select any find and update criteria. You will not be able to map the index fields, or specify different break values. When the images are imported into FileBound they will undergo OCR to allow them to be identified using Full Text Searching within FileBound.

## **Advanced FileBound Barcode Template**

This Barcode template is the same as the "Generic Barcode" template but will pre-configure modules to use the FileBound break values of 00F00, 00D00 and 00S00 to recognize, file, divider and separator breaks. Barcodes will be read in a left to right, top to bottom order. You will be able to configure which barcode will populate which index field within FileBound. You will be able to select any find and update criteria and specify break values.

## **Advanced FileBound Barcode (OCR) Template**

This Barcode template has the same functionality as the "Advanced FileBound Barcode" template but adds OCR capability. This template type will pre-configure modules to use the FileBound break values of 00F00, 00D00 and 00S00 to recognize, file, divider and separator breaks. Barcodes will be read in a left to right, top to bottom order. You will be able to configure which barcode will populate which index field within FileBound. You will be able to select any find and update criteria and specify break values. When the images are imported into FileBound they will undergo OCR to allow them to be identified using Full Text Searching within FileBound.

## Barcode Same Page Template

This Barcode template should be used when you are importing documents that contain a barcode value on the page that you are importing. You will be able to configure which barcode will populate which index field within FileBound. You will be able to select any find and update criteria and specify break values.

## Barcode Same Page (OCR) Template

This Barcode template has the same functionality as the "Barcode Same Page" template but adds OCR capability. This Barcode template should be used when you are importing documents that contain a barcode value on the page that you are importing. You will be able to configure which barcode will populate which index field within FileBound. You will be able to select any find and update criteria and specify break values. When the images are imported into FileBound they will undergo OCR to allow them to be identified using Full Text Searching within FileBound.

## Barcode Same Page with Dividers Template

This Barcode template should be used when you are importing documents that contain a barcode value on the page that you are importing and a barcode for the divider. You will be able to configure which barcode will populate which index field within FileBound and which barcode will be used to populate the divider name that the image is added to. You will be able to select any find and update criteria and specify break values.Z

## Barcode Same Page with Dividers (OCR)

This Barcode template has the same functionality as the "Barcode Same Page with Divider" template but adds OCR capability. This Barcode template should be used when you are importing documents that contain a barcode value on the page that you are importing and a barcode for the divider. You will be able to configure which barcode will populate which index field within

FileBound and which barcode will be used to populate the divider name that the image is added to. You will be able to select any find and update criteria and specify break values. When the images are imported into FileBound they will undergo OCR to allow them to be identified using Full Text Searching within FileBound.

## **Basic Image Import with OCR Template**

The Basic Image template should be used when importing documents that do not contain any indexing information. Indexing will be provided using the directory name where the image is located or other such types of information. When the images are imported into FileBound they will undergo OCR to allow them to be identified using Full Text Searching within FileBound.

## **CSV Import with OCR Template**

The CSV template should be used when importing file information that can be associated with scanned images. When the images are imported into FileBound they will undergo OCR to allow them to be identified using Full Text Searching within FileBound.

## **ERM Processing Template**

This template should be used when it is necessary to import and process ERM data. Within the template you will be able to specify all the breaking conditions that are needed to identify new files and document information and then the indexing information that will be used when the content is imported into FileBound.

## **Generic Barcodes Template**

This Barcode template should be used when it is necessary to specify specific breaking values and configure index field mapping when using barcodes. Barcodes will be read in a left to right, top to bottom order. You will be able to configure which barcode will populate which index field within FileBound. You will be able to select any find and update criteria and specify break values.

## Generic Barcodes with OCR Template

This Barcode template has the same functionality as the "Generic Barcode" template but adds OCR capability. This template type should be used when it is necessary to specify specific breaking values and configure index field mapping when using barcodes. Barcodes will be read in a left to right, top to bottom order. You will be able to configure which barcode will populate which index field within FileBound. You will be able to select any find and update criteria and specify break values. When the images are imported into FileBound they will undergo OCR to allow them to be identified using Full Text Searching within FileBound.

## Un-Indexed Queue Import Template

This template should be used when importing documents that do not have any associated index values. When the documents are imported into FileBound they will be entered into the Un-Indexed Queue to be indexed by a user within FileBound.

## XML Dataset Import Template

This template should be used when you need to import XML datasets. Within the template you will be able to specify the location within the XML dataset to identify indexing information. You will also be able to specify how to identify any associated documents to be imported.

## XML Dataset Import with OCR Template

This template has the same functionality as the "XML Data Import" template but adds OCR capability. This template should be used when you need to import XML datasets. Within the template you will be able to specify the location within the XML dataset to identify indexing information. You will also be able to specify how to identify any associated documents to be imported. When the images are imported into FileBound they will undergo OCR to allow them to be identified using Full Text Searching within FileBound.

## **Load Custom Template**

This will allow you to load a custom built configuration file that was created previously on a different machine.

## Working With Configurations

Configurations are the underlying architecture of the modules and their execution. Importer Pro allows for adding groups of modules arranged in a way to perform specific tasks. These groups of pre-placed modules are called 'Templates'.

Importer Pro has three basic templates and seventeen advanced templates available.

### **Basic Templates:**

1. FileBound Barcode
2. Basic CSV
3. Basic Image

### **Advanced Templates:**

1. Advanced FileBound Barcode (OCR)
2. Advanced FileBound Barcode
3. Generic Barcode (OCR)
4. Barcode Same Page with Divider (OCR)
5. Barcode Same Page with Divider
6. Barcode Same Page (OCR)
7. Barcode Same Page
8. Generic Barcode
9. FileBound Barcode (OCR)
10. ERM Processing
11. CSV with OCR
12. Basic Image with (OCR)
13. XML Data Import (OCR)
14. XML Data Import
15. Import to Un-Indexed Queue
16. Start Blank Template
17. Load Custom Config.

Every template has a specific set of pre-grouped modules in a tree structure. You can add or remove modules as per the requirement. The execution of modules follows a top to bottom hierarchy. However, you can re-arrange the modules to meet any specific requirements.

## Using Configuration Templates

A template is essentially a 'starter' configuration file that is used to start setting up a configuration file. Every template contains pre-grouped modules that are executed in the order that they are listed within the configuration file..

Perform the following steps to use a template for a configuration:

1. Click **Add Template** in the Configuration panel.
2. Select the template from the **Available Templates** dialog.
3. Click **OK**.
4. Select a folder to save the configuration file from the configuration dialog.
5. Specify the file name in the **File name** box.
6. Click **Save**.

The 'Chain Configuration' is loaded with pre-grouped modules.

**Note: Note:** *The pre-grouped module structure depends upon the selected template.*

## Removing a Chain Configuration

Perform the following steps to remove a chain configuration from the configuration list:

1. Select the chain in the **Configuration** panel.
2. Click button.

The confirmation dialog appears to confirm the removal of the chain configuration.

3. Click **Yes** in the confirmation dialog.  
The chain is removed from the configuration list.

**Note: Note:** *You cannot remove multiple chain configurations.*

## Renaming a Configuration

Perform the following steps for renaming a 'Chain Configuration':

1. Select the **Configuration** in the **Configure** panel.
2. Right-click the selected chain configuration to view the shortcut menu.
3. Select **Rename** from the menu.
4. Specify the new name for the 'Configuration'.

The configuration is renamed with the specified name.

## Working with Modules

The architecture of the configuration comes with the pre-grouped modules in the form of a tree structure. You can add modules under the chain configuration as well as under the existing modules. Importer Pro allows you to add modules under any tree node. The Add Module dialog opens the list of available modules. It contains modules available for all the respective templates. Once the module is added, it can be renamed, removed or repositioned within the tree structure.

The execution of the modules starts from top to bottom sequence. Therefore, it is important to add modules in an appropriate sequence.

For example: If you want to add the 'Backup Files' module, then it is recommended that you add the 'Backup Files' module above the 'Delete System Files' module.

## *Adding a Module*

Perform the following steps for adding modules to the chain configuration:

1. Select the **Chain Configuration** in the Configure panel.
2. Right-click the selected chain configuration to see the shortcut menu.
3. Select **Add** from the menu.

**Add Module** dialog appears.

4. Select a **Module** in the 'Add Module' dialog.
5. Click **OK**.
6. Click the Save button on the button panel.

The new module appears in the hierarchy of the chain configuration tree structure.

A message is displayed after the chain configuration is saved.

## *Renaming a Module*

You can rename a module within the tree structure.

Perform the following steps for renaming a module:

1. Select the module in the 'Configure' panel.
2. Right-click the selected module to show the shortcut menu.
3. Click **Rename** from the menu.  
**Choose Project** becomes editable.
4. Specify the new module name.

The module name is renamed with the specified new module name.

## *Saving the Module Configuration*

Any changes made to the chain configuration need to be saved before execution takes place.

Perform the following steps to save the module configuration:

1. Click the save button on the button panel.

A confirmation message is displayed after the chain configuration is saved.

## *Repositioning the Module in the List of Modules*

You can change the hierarchy of modules by repositioning them in the tree structure. You can use and for moving the selected module to one level up or down in the hierarchy.

Likewise, you can use for including the selected module under the hierarchy of other module and for excluding the selected module from the hierarchy of the other module.

Perform the following steps to reposition the module:

1. Select the module in the 'Configure' panel.
2. Click in the button panel.

The module is moved to the next level in the hierarchy.

## *Removing a Module*

You can remove a module in multiple ways. If you remove a parent module, it automatically removes child modules added under the parent module hierarchy.

- Perform the following steps for removing a module from the right-click shortcut menu:
  - i. Select a module in the Configure panel.
  - ii. Right-click the selected module to see the shortcut menu.
  - iii. Select **Remove** from the shortcut menu.
  - iv. The confirmation dialog appears to confirm removing of the module.
  - v. Click **OK** in the Confirmation dialog.

The module is removed from the hierarchy along with any child module(s) added under the hierarchy of the module.

- Perform the following steps for removing a module from the right side button panel:
  - i. Select a module in the Configure panel.
  - ii. Click the delete button on the button panel.
  - iii. Click **OK** in the Confirmation dialog.

The module is removed from the hierarchy including any child module(s) added under the hierarchy of the module.

## Executing The Process

You can run one or more selected import processes manually or automatically. Import processes can be run automatically between specific intervals and also when Importer Pro starts. You can stop a running import process manually, before or after the import process is completed.

### Starting the Process Execution

Execution process is started either manually or it is run after an interval set in minutes.

Perform the following steps to start the process execution:

1. Select the chain(s) in the Configuration panel.
2. Click from the button panel located at the top of the screen.

A processing log with the progress statistical chart is displayed.

**Note: Note:** *The log processing is run repeatedly after an interval set in the settings. If the processing is stopped manually, then the set interval is ignored.*

### Viewing the Process Status and Process Log

Importer Pro has a built in logging system. The logs are maintained date-wise in a text file within the default location.

The logging system is divided in two sections for optimized tracking.

1. Processing Logs
2. Statistical Charts

The processing logs section contains information about the success and failure messages that occur during execution. In addition to these messages, the processing logs display the counter for the next cycle.

## Executing the Process

### Stopping the Process Execution

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The statistical chart displays two graphs respectively i.e. 'Files' and 'Documents'. The graph displays the uploading process of every file or document in the FileBound system.

Perform the following steps to view the processing logs and statistical charts:

1. Start the execution process.
2. The 'Processing Log' pane is displayed followed by the 'Statistical Charts'.

The logs are stored in a text file within the default location.

## Stopping the Process Execution

Perform the following steps to stop the process execution:

1. Click from the toolbar located at the top of the Importer Pro window.

The confirmation dialog appears to confirm abrupt termination of the process execution.

2. Click **Yes** in the confirmation dialog.

The execution process is stopped and the **Stop Execution** window opens.

## Working With The Modules

After selecting a chain configuration, you can add modules to specific locations of the chain configuration. The specific location in the chain configuration structure where the module must be added depends on the sequence in which the import process must be executed. When you select a module, which is already added to the chain, the configuration information for the added module is displayed in the right window pane. You can make changes to the configuration for the added module as per your import process requirement.

## Backing up Files

You can add a **Backup Files** module to the chain configuration to keep a backup copy of the files used in the import process.

## *Configuring Backup Settings*

You can configure the **Backup Files** module after adding the **Backup Files** module to a chain configuration.

### Configuring the Main Settings

Perform the following steps to configure the main backup settings:

1. Select the chain configuration in the Importer Pro window.
2. Add the **Backup Files** module to the chain configuration.
3. Select in the selected chain configuration.
4. You can specify the backup location in the following ways:
  - Specify the path in the **Backup Location** box.
  - OR,
  - Click to select the backup folder location from the **Browse for Folder** dialog.
5. Select the **Overwrite File if it exists** check box to overwrite a file with the same name in the backup folder location.
6. Click the **Save** button in the button panel.

### Configuring the Advanced Settings

Perform the following steps to configure the advanced settings of a **Backup Files** module in the chain configuration:

1. Click .

The **Advance Settings** dialog opens.

2. Specify the name of the input file name variable the module uses in the **Input File Name Variable** box.
3. Click **OK** to save.
4. Click the **Save** button in the button panel.

## Choosing a Project

You have to choose a FileBound project for the following reasons:

- To specify the FileBound project you want to import data into.
- To create a new file in the project with the imported data.
- To update information within FileBound using Importer Pro.

**Note: Note:** *Do not specify a project when you are importing unindexed documents to FileBound.*

## *Configuring Choose Project Settings*

You can configure the **Choose Project** module after adding the **Choose Project** module to a chain configuration.

### Configuring the Main Settings

Perform the following steps to configure the project settings:

1. Select the chain configuration in the Importer Pro window.
2. Add the **Choose Project** module to the chain configuration.
3. Select in the selected chain configuration.
4. You can choose a project by selecting the project name from the drop-down list, specifying the project name manually or entering the project id as follows:
  - i. Select the **By Name** option.
  - ii. Specify the project name in the **By Name** box.OR,
  - i. Select the **By Name** option.
  - ii. Select the project name from the drop-down listOR,
  - i. Select the **By ID** option.
  - ii. Specify the project ID in the **By ID** box.
5. Select the **Selection Scripted** check box if the module is linked to a script.
6. Select the **Only attempt to pull Project one time** to allow Importer Pro to be able to cycle through configurations without having to prompt for another login
7. Click the **Save** button in the button panel.

### Configuring the Advanced Settings

Perform the following steps to configure the advanced settings of the chosen project:

1. Click .

The **Advanced** dialog opens.

2. Specify the name of the 'Business Variable' in the **Input Business Variable Name** box.
3. Specify the name of the 'Project Variable' that the module may pass to other modules in the **Output Project Variable Name** box.
4. Click **OK** to save.
5. Click the **Save** button in the button panel.

## Connecting to a FileBound Server

Before you can import data to a FileBound project you must specify the FileBound server that you are going to use for the import process. You can specify the FileBound server and its configuration by adding the FileBound Server Connect module.

## Configuring the Connection to a FileBound Server

You can configure the FileBound server connection after adding the FileBound **Server Connect** module to a chain configuration.

### Configuring the Main Settings

Perform the following steps to configure the FileBound server connection:

#### Web Connection Method

1. Select the chain configuration in the Importer Pro window.
2. Select in the selected configuration.
3. Specify the URL of a FileBound server in the **ServerURL** box. A direct database connection can be used as well.
4. If a script to populate the ServerURL has been enter in the ServerURL field select the **Scripted?** checkbox
5. Specify a FileBound user name in the **Username** box.
6. Specify the password for the FileBound user in the **Password** box.
7. Click **Authenticate** to connect and test the connection to the FileBound server (*This will allow other modules to automatically pull information about the selected FileBound server including project names and index fields.*)
8. Click the **Save** button in the button panel.

#### Direct Database Connection Method

The Direct Database Connection Method can only be used when importing information to an On-Site FileBound installation. This cannot be performed when connecting to a FileBound On-Demand site.

1. Select the chain configuration in the Importer Pro window.
2. Select in the selected configuration.
3. Specify the database connection string within the **ServerURL** box.
4. Specify a FileBound user name in the **Username** box.
5. Specify the password for the FileBound user in the **Password** box.

## Working with the Modules

### Connecting to a FileBound Server

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6. Click **Authenticate** to connect and test the connection to the FileBound server (*This will allow other modules to automatically pull information about the selected FileBound server including project names and index fields.*)
7. Click the **Save** button in the button panel.

#### Example Connection String:

```
Persist Security Info=True;Initial Catalog=fbdoc54;Data Source=ACMESERVERNAME\FILEBOUNDV5;User ID=sa;Password=filebound;
```

**Note: NOTE:** *The connection string information can be found within the web.config file that is located on the FileBound web server. The default location for this file is C:\inetpub\wwwroot\web.config.*

## Configuring the Advanced Settings

Perform the following steps to configure the advanced settings of the FileBound Server Connection:

1. Click .

The **Advanced Settings** dialog opens.

8. A database connection string can be specified in the **Auto Data** field to connect to the database of the FileBound server through a SQL connection instead of connecting through the web.
9. You can specify a DLL file that will connect you to a different version of FileBound in the following ways:
  - Specify a DLL file in the **DLL** box.OR,
  - Click to select the DLL file from the **Open** dialog.
5. Specify the name of the 'Output Data Variable' that may be passed to other modules in the **Output Data Variable** box.
6. Specify the name of the 'Output Business Variable' that may be passed to other modules in the **Output Business Variable** box.
7. Specify a URL in the **Server URL Variable** box that is added to the dictionary upon execution.

8. Click **OK** to save.
9. Click the **Save** button in the button panel.

## Setting FileBound Custom Scripts

The FileBound Custom Scripts module is used to perform special scrubbing functions on the data.

## *Configuring Settings for FileBound Custom Scripts*

The FileBound Custom Scripts module is placed before or after the importing function is executed.

### Configuring the Main Settings

Perform the following steps to configure the main settings for the FileBound Custom Scripts module:.

1. Select the FileBound Custom Scripts module in the Configure pane.
2. Specify the **Evaluation** string in the Evaluation box.
3. Specify the **Functions** in VBScript in the Functions box.  
The specified functions are available whenever the scripting option is selected.

### Configuring the Advanced Settings

Perform the following steps to configure the advanced settings for the FileBound Custom Scripts module:

1. Click .

The **Advanced Settings** dialog opens.

2. Specify 'Evaluation string Variable' in the **Input String Variable** box.
3. Specify the name of the 'String Variable' that the module may pass to other modules in the **Output String Variable** box.
4. Click **OK** to save advanced settings.
5. Click the **Save** button in the button panel.

## Deleting System Files

You can add a **Delete System Files** module in a chain configuration to delete the files marked for deletion. Files must be marked for deletion earlier in the chain configuration by adding the **Flag for Delete** module.

## Configuring Settings for Deleting System Files

You can configure the advanced settings of a **Delete System Files** module after adding the **Delete System Files** module to a chain configuration.

### Configuring the Advanced Settings

Perform the following steps to configure the advanced settings of a **Delete System Files** module in the chain configuration:

1. Select the chain configuration in the Importer Pro window.
2. Add the **Delete System Files** module to the chain configuration.
3. Select in the selected chain configuration.
4. Click .

The **Advance Settings** dialog opens.

5. Specify the name of the 'Input Delete Collection Variable' the module uses in the **Input Delete Collection Variable** box.
6. Click **OK** to save.
7. Click the **Save** button in the button panel.

## Document Attribute Selector

The Document Attribute Selector module is used only in the Barcode template. It is used to set the attributes of a document being processed, usually divider, separator, and name. If there is no barcode sheet for name, then you can specify the name of the document. You can also use the document attribute selector to set all the dividers and separators on an upload if you are not using divider and separator break sheets.

## *Configuring Settings for Document Attribute Selector*

The Document Attribute Selector module is used to set various attributes of a FileBound document.

### **Configuring the Main Settings**

Perform the following steps to configure the main settings for the Document Attribute Selector module:

1. Select the Document Attribute Selector module in the Configure pane.
2. Specify the current FileBound document's **Name** in the Name box.
3. Specify the **Separator** in the separator box.
4. Specify the **Divider** in the divider box.
5. Specify the **Archive** information in the archive box.
6. Specify the **OCR** property in the OCR box.
7. Specify the **Notes** in the notes box.
8. Specify the **Route** in the Route box.
9. Select **Scripted** check box to turn on VBScript evaluation of the contents of the preceding text box  
Scripted option allows you to manipulate the values in various (replacements bracketed by a “[” and “]”) to make the needed modifications before they are saved to FileBound. Scripting requires either a Globally Shared Function module or a Custom String script module.
10. Select **Route All** check box to route the uploaded documents down a specific Workflow Route ID within FileBound after upload.  
When the Route All option is checked, all documents uploaded are routed down the route specified in the route box. If Route All option is not checked then only the first page of a set of documents is routed.

## Configuring the Advanced Settings

Perform the following steps to configure the advanced settings for the Document Attribute Selector module:

1. Click .

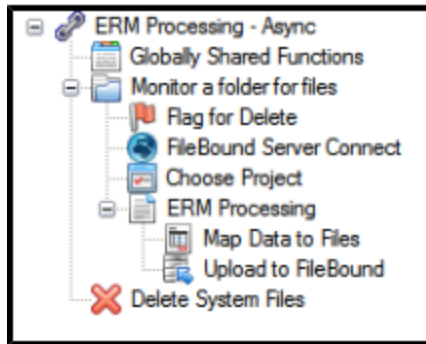
The **Advanced Settings** dialog opens.

2. Specify the name of the 'Project Variable' in the **Project Variable** box.
3. Specify the name of the 'Document Variable' in the **Document Variable** box.
4. Click **OK** to save advanced settings.
5. Click the **Save** button in the button panel.

## ERM Processing

Importer Pro provides support to process ERM (Enterprise Report Management) data. This type of data is often used in banking reports, customer invoicing and billing, and in any place that streams of data might be sent to a printer and printed on pre-printed forms. Importer Pro can be used to capture this data, parse any breaking conditions that would identify unique files and pages within the captured input file and then upload the parsed information into a FileBound server.

The ERM Processing Module can be used as a single module in the configuration chain or multiple modules can be used within the configuration to perform more complex functions. Adding additional ERM Processing modules as children of a Parent ERM Processing module will allow a secondary level of processing. An unlimited number of levels of processing can be configured using this method.



## Configuring ERM Processing Settings

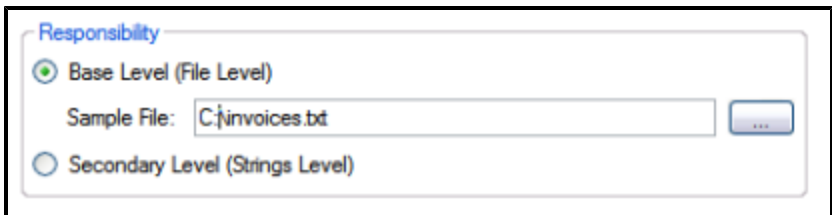
You can configure the **ERM Processing** module after adding the **ERM Processing** module to a configuration.

### Configuring the Main Settings

Perform the following steps to configure the processing settings:

#### Responsibility

1. Select the configuration in the Importer Pro window
2. Add the **ERM Processing** module to the configuration
3. Select **ERM Processing** in the selected configuration
4. Within the Responsibility section select the level of processing
  - a. Base Level (File Level) is the most basic segment and is used to identify a single "Page" to be uploaded to FileBound
  - b. Secondary Level (Strings Level) is a secondary level of break conditions and is used to create a subset of content within a main base level. This is used when you have a need to identify multiple pages within a single file.
5. Select the Browse button and enter a sample file to be used to setup break conditions



#### Content Options

1. Within the Content Options section select a Break Condition by clicking on the **Select Dynamically** button, the sample file selected from within the Responsibility section will be displayed.

## ERM Processing

### Document Attribute Selector

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2. Highlight the text to be used for the Break Condition, whenever Importer Pro detects this condition a new break will be created. When finished click **OK**.
3. Make any necessary break condition adjustments by selecting the line that the break will occur on based on the break condition that was set. Within the Starts on field select the number of lines to adjust the break and then select if the adjustments should be made in a backward or forward direction from the break condition.

The screenshot shows the 'Content Options' dialog box. The 'Break Condition' field contains the text `InStr("[LINE]","INVOICE ")>0`. Below it is a 'Select Dynamically' button. The 'Starts on' field is set to '10' line(s) in the 'BKWD' direction. The 'Level Length' is set to '0' (optional). The 'Content DataString' is set to '25' (optional).

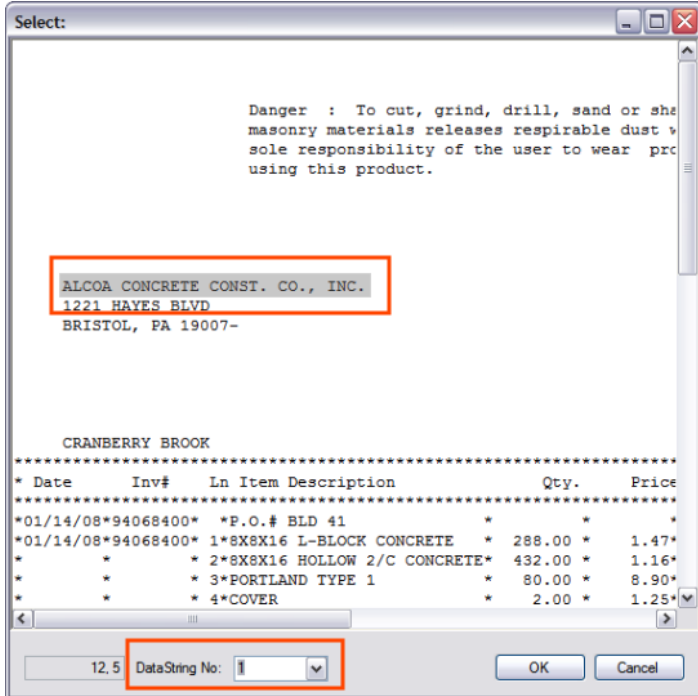
*In the example above a break will be created  
10 lines before the word "INVOICE".*

9. If a more advanced break condition needs to be created you can click on the Advanced button next to the Break Condition field and manually enter the Break Condition.
10. If the break condition always occurs at a given number of lines in the imported file you can enter the number of lines in the **Level Length** field.
11. Select a Content DataString to store the parsed information that is identified with the break condition. If you are unsure use a value of 25.

## Fields

1. Click the **Add** button to add a location to use extract information to be used for indexing the file and documents

2. Click **Yes** to select to use the wizard to select the field. You may select **No** if you know exactly the information to enter to specify the location to extract the information.

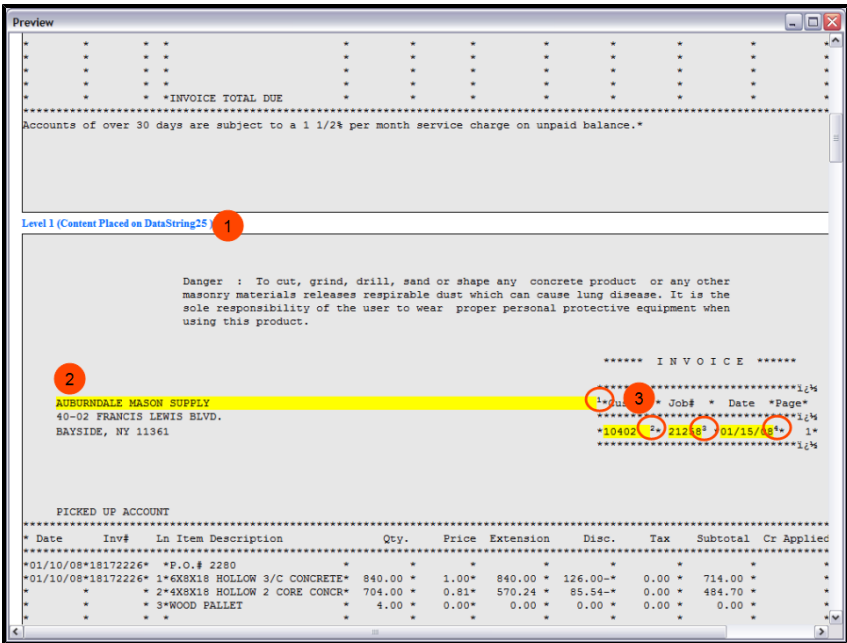


3. Highlight the area of the document that information will be extracted from
4. Select the DataString No that the information should be stored on
5. Repeat Steps 1-4 until all necessary information locations have been added. Click **OK** when finished.

**Note: Note:** Field information can also store information to be used for file notes, document notes, dividers, and separators, etc. It is not limited to just index fields.

## Preview ERM Processing Settings

After entering settings to determine how the ERM data will be processed the Preview button can be used anytime if a Sample File has been selected. The preview will display where breaks will be created based on the Break Condition that was entered, field information will be highlighted and indicate the DataString where the extracted data will be stored.

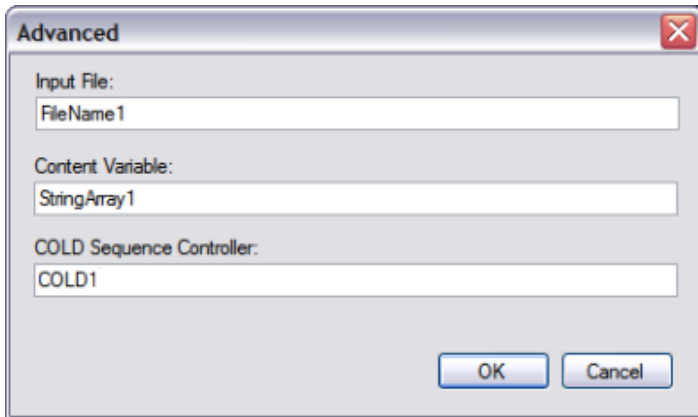


1. Level Break - Indicated that it is stored on DataString 25
2. Location to extract information for Field 1
3. Subscript numbers indicating the fields that the information will be extracted for

## Configuring the Advanced Settings

Perform the following steps to configure the advanced settings of the chosen project:

2. Click .



The **Advanced** dialog opens.

3. Specify the name of the 'Business Variable' in the **Input File** box.
4. Specify the name of the 'Content Variable' that the module may pass to other modules in the **Content Variable Name** box.
5. Specify a COLD Sequence Controller Number to indicate the order the process should be performed.
6. Click **OK** to save.
7. Click the **Save** button in the button panel.

## Using the File Collection Rebuilder

File Collection Rebuilder is used for Barcode templates. File Collection Rebuilder is an intermediate module that runs through each file and document in a file collection, add each file or document combination to the dictionary, and then call any child modules. After the child modules are done executing, the new file collection produced are assembled and placed on the dictionary for later use.

## *Configuring Settings for File Collection Rebuilder*

The Field Mapping object doesn't know about the barcodes on the page so it simply creates one file with however many pages in the barcode image file (TIF file). To process the barcodes we need to iterate through the files and documents and recreate a file collection that represents what needs to be send to the FileBound server. This iteration is the purpose of File Collection Rebuilder.

### Configuring the Main Settings

Perform the following steps to configure the main settings for the File Collection Rebuilder module:

1. Select the **File Collection Rebuilder** module in the configure pane.
2. Select **Traverse Files only [No Documents]** check box to pass through the files.

### Configuring the Advanced Settings

Perform the following steps to configure the advanced settings for the File Collection Rebuilder module:

1. Click .

The **Advanced Settings** dialog opens.

2. Specify the name of the 'File Collection Variable' the module uses in the **Input File Collection Variable** box.
3. Specify the name of the 'File Collection Variable' that the module may pass to other modules in the **Output File Collection Variable** box.
4. Specify the name of the 'File Variable' the module uses in the **File Variable** box.
5. Specify the name of the 'Document Variable' the module uses in the **Document Variable** box.
6. Click **OK** to save advanced settings.
7. Click the **Save** button in the button panel.

## Flagging for Delete

You can add a **Flag for Delete** module in a chain configuration to mark files for delete that are no longer required when the import process has completed execution.

## Configuring Delete Flag

You can configure the advanced settings of a **Flag for Delete** module after adding the **Flag for Delete** module to a chain configuration.

### Configuring the Advanced Settings

Perform the following steps to configure the advanced settings of a **Flag for Delete** module in the chain configuration:

1. Select the chain configuration in the Importer Pro window.
2. Add the **Flag for Delete** module to the chain configuration.
3. Select in the selected chain configuration.
4. Click .

The **Advance Settings** dialog opens.

5. Specify the name of the 'Input File name Variable' in the **Input File-Name Variable** box.
6. Specify the name of the 'Delete Collection Variable' that the module may pass to other modules in the **Delete Collection Variable** box.
7. Click **OK** to save.
8. Click the **Save** button in the button panel.

## Globally Shared Functions

The Globally Shared Functions module gives the option to script in personal functions to be used anywhere in the loaded chain.

The functions are stored for whenever scripting is selected as an option while configuring the module. There is an option of loading an existing VBScript file.

## *Configuring Globally Shared Functions*

Perform the following steps for configuring globally shared functions:

1. Select the **Globally Shared Functions** module in the Configure pane.
2. Specify functions in VBScript in the Functions box.
3. Alternatively, click **From File** to load the content of a pre-existing VBScript file.

**Note:** *If there is already data inside the **Functions** box, information from file loaded is appended.*

## **Mapping Data to Files**

The Map Data to Files module handles mapping of CSV fields, barcode sheets, and documents with FileBound field, file and document information. There are multiple ways to set the field, file, and document value. It can be set by selecting the value from the list or by specifying the value that exists on the dictionary. If a value is not found on the dictionary then it is assumed as the literal string of information that is provided.

As per the mapping set in the Map Data to Files module, the Upload to File-Bound module uploads the data into FileBound.

## *Configuring Mapping Data*

The Map Data to Files module maps CSV fields, barcode sheets, and documents with the FileBound field, document, and file information. Depending upon the selected template, the mapping items are populated.

The field mapping is done by specifying the Field ID and Field Value.

The document mapping is done by specifying the document source along with the document name, separator, divider and other attributes.

The file mapping is done by specifying the File ID and File Description.

## **Configuring the Main Settings**

The mapping items can be added and removed as per the requirement.

### *Adding Mapping Items in the mapping list:*

1. Select **Mapping Data to Files** module in the Configure pane.
2. Click Add

The **Add Mapping Item** dialog opens.

3. Select a mapping item from the list.
4. Click **OK** to add the mapping item in the mapping pane.
5. Click the **Save** button in the button panel.

### *Removing Mapping Items from the mapping list:*

1. Select the mapping item to be removed from the mapping list.
2. Click button to remove the mapping item from the list.  
The mapping item is removed from the list.
3. Click the **Save** button in the button panel.

## **Mapping to FileBound Fields:**

Perform the following steps for mapping a FileBound index field.

1. Select **Field** from the mapping item list.
2. Specify 'Field Number' in the **Field Number** box. (This is the field number for the index field located within FileBound. If you are not sure what field number should be used, refer to the project setup with the FileBound server Admin Utility). If you used the "Authenticate" button within the **Server Connect** module you can also select the appropriate FileBound index field from the drop down.  
The specified field number is mapped with the respective column in the CSV file. The appropriate CSV column is set using the "Field Value" list.

3. Select the 'Field Value' from the **Field Value** list.

There are multiple ways to set the field value:

- i. Select the variable name from the **Field Value** list.

By default, the list contains several values that are on the dictionary [based on the preceding modules].

This is a very long list, be sure to scroll through the entire list to determine the best option for the mapping.

If any other value exists in the dictionary, it can be manually typed in the box.

OR,

- ii. Specify a literal value in the **Field Value** box.

Whenever a value is not found in the dictionary it is assumed as a literal string entered into the field.

OR,

- iii. Select **Scripting** box for mapping field.

Scripting is an advanced way to map a field. The scripting function requires a Custom Script module or Globally Shared Functions module configured for using this function.

4. If you need to map multiple fields, repeat the step 1 through step 3 again until all the fields are properly mapped.
5. Click the **Save** button in the button panel.

### **Mapping to FileBound Document:**

Perform the following steps for mapping the FileBound document.

1. Select **Document** from the mapping item list.
  
6. Specify or select 'Source' from the **Source** list. Example: When importing a CSV file, select the column number that contains the name or location of the associated image to be imported.
7. Select **Use Variable Content as Binary Data** for saving variable content as binary data.  
The **Use Variable Content as Binary Data** option is used mainly for ERM or COLD processing.  
  
**For example:** It is used when you do not have a disk image and you want to save some content (text) as the document. In that case setting this option allows you to save text as the binary data for the document. You would also want to set the extension to TXT.
  
8. Specify or select 'Name' from the **Name** list to set the document name in the FileBound. This option will replace the default 'Page 0001', etc. label when a page is uploaded into FileBound.
9. Specify or select 'Separator' from the **Separator** list to set the FileBound separator.
10. Specify or select 'Divider' from the **Divider** list to set the FileBound divider.
11. Specify or select 'Archive' from the **Archive** list to set the value for the document archive in 'FileBound
12. Specify or select 'OCR data' to import from the **OCR** list.  
Using this option you can specify an OCR file to import with the document and used for the OCR text for the document in FileBound.

13. Specify or select 'Notes' from the **Notes** list to enter information into the document notes area of the imported FileBound document.
14. Specify or select 'Status' from the **Status** list to set the status of the document.

By specifying status you can provide the status of a document in SQL.

**Note: Note:** *This is applicable for importing unindexed documents.*

15. (Used with the 'Unindexed' Status) Specify or select 'Related Project ID' from the **RelateProjID** list to set the project ID that the document will be imported into with FileBound.

This is where you set the project ID of the project where you want unindexed files to go.

**Note: Note:** *This is applicable for importing unindexed documents.*

16. Specify or select 'Route' from the **Route** list to select the workflow route the document will be routed down in FileBound after it is imported.
17. Specify or select 'Extension' from the **Extension** list to set an extension for a document when imported.

This provides an extension for a document when imported.

**For example:** Some scanners output TIFF file as PRN file. Here you can specify the extension as TIFF and it changes the extension of the imported document to TIFF from PRN.

18. Select **Route All Documents** check box to route all the documents down the workflow route that is specified.

When the Route All option is checked all documents uploaded are routed down the route specified in the route box. If Route All option is not checked then only the first page of a set of documents is routed.

19. Select **Scripting** box for mapping document properties using the scripting option.

The scripting function requires a Custom Script module or Globally Shared Functions module configured for using this function.

20. Click the **Save** button in the button panel.

### *Mapping to a FileBound File:*

1. Select **File** from the mapping item list.
2. Specify or select 'File ID' from the **FileID** list.
3. Specify 'File Description' from the **File Description** list.  
The file description can be specified here as a dictionary value, a literal or a scripted value. The data is applied to the file notes. In case of multiple file mappings, the last file description is used for the file created.
4. Select **Scripting** box for mapping document properties using scripting option.  
The scripting function requires a Custom Script module or Globally Shared Functions module configured for using this function.
5. Click the **Save** button in the button panel.

## Configuring the Advanced Settings

1. Click .
2. Specify the name of the 'Project Variable' in the **Input Project Variable** box.
3. Specify the name of the 'File Name Variable' in the **Input File Name Variable** box.
4. Specify the name of the 'Output File Collection Variable' that the module may pass to other modules in the **Output File Collection Variable** box.
5. Specify the name of the 'Output Document Path Variable' that the module may pass to other modules in the **Output Document Path Variable** box.
6. Click **OK** to save.
7. Click the **Save** button in the button panel.

## Monitoring a Folder for Files

The Monitor a Folder for Files module monitors the file(s) in the specified folder. A folder path is added for monitoring the file(s) with the specific extensions.

Importer Pro picks up the file(s) with the specified extension for executing data. Common extensions such as \*.tif, \*.jpg, \*.csv, \*.gif or exact file names can be used. The folder is checked on a rolling timed loop set in the run time settings of Importer Pro.

### *Configuring Folder Monitoring Settings*

The monitoring folder is checked on a rolling timed loop set in the run time settings of the Importer Pro.

### Configuring the Main Settings

Perform the following steps to configure the main settings of the monitor a folder for files module:

1. Select **Monitor a folder for files** module in the Configure pane.
2. Click button to add the folder path.

The **Browse For Folder** dialog opens.

3. Select the folder for monitoring.
4. Click **OK** to add the folder path in the module.
5. In the Monitor Options pane, specify the extension with or without the filename.

**Note: Note:** Multiple extensions are not allowed. You can use \*.\* as an option to look for all the extensions.

6. Specify the extension in **Do Not Rename with Extensions** box to avoid renaming of the specified file extensions.

## ERM Processing

### Monitoring a Folder for Files

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When the Importer Pro looks at a location to pull files, it renames the extension by appending the same extension again. For example: if .jpg is specified, then it renames to ".jpg.jpg". Selecting **Do Not Rename with Extension** option will prevent the file extension from being renamed but the file will still be imported.

7. Select **Traverse Subfolders** check box to have Importer Pro pass through the sub folders and look for valid extension types to import.

Perform the following steps to edit the main settings of the Monitor a Folder for Files module:

1. Select the folder path from the list of added folder paths in the **Folders to Watch** pane.
2. Click button to edit the folder path.  
The Browse for Folder dialog opens.
3. Select the folder to monitor
4. Click **OK**.

Perform the following steps to remove the main settings of the Monitor a Folder for Files modules:

1. Select the folder path from the list of added folder paths in the **Folders to Watch** pane.
2. Click button to remove the folder path from the list of added folder paths in the Folders to Watch pane.  
The confirmation dialog for the removal of the selected folder path appears.
3. Click **Yes** in the confirmation dialog to remove the selected folder path.

## Configuring the Advanced Settings

Perform the following steps to configure the advanced settings of the Monitor a Folder for Files module:

1. Click **Advanced** button.

The **Advanced** dialog opens.

**Note: Note:** *The Monitor a Folder for Files module outputs a file name and then runs any child modules underneath it. The variable listed in the advanced settings is the reference on the dictionary in which the current processed path is stored.*

2. Click **OK** to save advanced settings.
3. Click the **Save** button in the button panel.

## Opening and Reading CSV Data

The Opening and Reading CSV Data module is grouped with the CSV template. The Opening and Reading CSV Data module contains delimiters that separate values while reading from the CSV file.

Importer Pro supports delimiters tab, semicolon, space, comma and an option to specify the delimiter of your choice.

## Configuring CSV Data Settings

The Opening and Reading CSV Data module reads through the CSV file and uses the specified delimiter for separating the data.

### Configuring the Main Settings

Perform the following steps to configure the main settings for Opening and Reading CSV Data module.

1. Select the **Opening and Reading CSV Data** module in the Configure pane.
2. Select the **Delimiter** from the Delimiter pane.

For example: The following CSV file is created for uploading employee records to a FileBound project. In Opening and Reading CSV Data module, comma is selected as a delimiter when reading the CSV file.

The Opening and Reading CSV Data module considers the data preceding the comma as a value. It uploads the value into the File-Bound project fields as per the mapping configured in the Mapping Data to Files modules.

In this case, for the first row, the data "Maria" is considered as a value and is uploaded to the mapped field. Likewise, the data is segregated using a specified delimiter.

3. Specify **scripting syntax** in the Pre-process scripting box.  
The Pre-process scripting box is a scripted field that allows you to manipulate the full CSV line before it is processed. For example: you can replace tildes with commas by **Replace**("[LINE]", "~", ","). You can rearrange the data in any other manner, as desired.
4. Click the **Save** button in the button panel.

## Configuring the Advanced Settings

Perform the following steps to configure the advanced settings for the Opening and Reading CSV Data module.

1. Click .

The **Advanced Settings** dialog opens.

2. Specify the name of the 'File Name' in the **Input Filename Variable** box.
3. Click **OK** to save.
4. Click the **Save** button in the button panel.

## Processing Barcode Data

The Barcode processing module handles the reading and interpreting of barcodes on a document. The barcodes can contain information pertaining to the project along with the dividers or separators to be created within the project.

### *Configuring Settings for Barcode Processing*

Importer Pro has a separate template for barcode processing. The barcode template comes with the pre-grouped modules required for the barcode processing. By default, the Barcode Processing module is placed under the File Collection Rebuilder module.

## Configuring the Main Settings

Perform the following steps to configure the main settings of the Barcode Processing module:

1. Under the Barcode Sheets template, select **Barcode Processing** module in the Configure pane.
2. Select **Discard break pages** option if the imported pages containing the barcodes should be deleted after the barcodes have read the information used for indexing.

## Configuring the Advanced Settings

Perform the following steps to configure the advanced settings of the Barcode Processing module:

1. Click .

The **Advanced Settings** dialog opens.

2. Specify the name of the 'File Variable' in the **File Variable** box.
3. Specify the name of the 'Document Variable' in the **Document Variable** box.
4. Specify the name of the 'FileBound Business Variable' in the **Input FileBound Business Variable** box.
5. Specify the name of the 'Project Variable' in the **Project Variable** box.
6. Click **OK** to save.
7. Click the **Save** button in the button panel.

## Uploading Data to FileBound

The purpose of the Upload to FileBound module is to save files and documents to a FileBound site. This module uploads newly added files and documents as per the specified mapping set in the Map Data to Files module.

## Configuring Upload Settings

The Upload to FileBound module uploads the data into FileBound. It allows finding any specific field for updating the existing values. If both the Find and Update lists contain values, then the files matched based on the Find criteria will have the Update list fields updated with data from the input file i.e. CSV file, barcode sheets, and document.

## Configuring the Main Settings

Perform the following steps to configure the main settings of the Upload to FileBound module:

1. Select the **Upload to FileBound** module in the Configure pane.
2. **New Files** - Use this setting to create a new file within FileBound. If an existing file with the same index values exists, the imported document will merge into the existing file.
3. **Find and/or Update Existing Files** - Use this setting to search FileBound using the selected Find fields and merge imported documents into the existing files. Selecting Update fields will update files found with the selected updated values. If no file is found a new file will be created and indexed with the imported indexes.
4. Select **Field** to be searched from the generic list of FileBound fields.
5. Click button to add the selected field into the find list.  
This is the find list of FileBound fields. This module tries to find a file in FileBound that matches the values of the selected fields in the find list. Multiple fields can be added to the Find box, allowing Importer Lite to find files with that match using the multiple search criteria
6. Select **Field** to be updated from the generic list of FileBound fields.
7. Click button to add the selected field into the update list.  
It allows finding any specific field for updating the existing values. If both the Find and Update lists contain some values, then the files matched based on the find criteria have the update list fields updated with data from the input file i.e. CSV file, barcode sheets, and document.

## ERM Processing

### Uploading Data to FileBound

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8. Select **Do not create new File if Find Fields not matched** check box to avoid creating a new file in FileBound if fields listed in the find list do not exist in FileBound.
9. Click **Save** button in the button panel.

## Previewing the Import

Importer Pro will let you see a preview of how the import will be processed before being actually being imported to a FileBound server. Clicking the Preview button will start the import preview.

Clicking **Next File** will process the next item that would be imported and display it in the preview mode. Clicking **Previous File** would show the previously display file. This same process can be done at the document level using the **Next Document** and **Previous Document** buttons.

## Configuring the Advanced Settings

Perform the following steps to configure the advanced settings of the Upload to FileBound module.

1. Click .

The **Advanced Settings** dialog opens.

2. Specify the name of the "Input Project Variable" in the **Input Project Variable** field.
3. Specify the name of the "Input File Collection Variable" in the **Input File Collection Variable** field.
4. Specify the name of the "Document Path" that the module may pass to other modules in the **Output Document Path** field.
5. Specify the name of the "Data Connector Variable" that the module may pass to other modules in the **Data Connector Variable** field. This field is optional and is not required by Importer Pro to properly process imported items.
6. Select any **Advanced Upload Settings** that might need to be selected.
7. Click **OK** to save the advanced settings.
8. Click **Save** button in the button panel.

## Advanced Upload Settings

### Do Not Always Assume New File

Use this setting when uploading documents to a specified FileID. If the FileID is not specified then a new file will be created.

### Do Not Save Files

Use this setting when uploading documents to a specified FileID.

### **Do Not Seek File Merges**

When file information is imported, FileBound will not be searched to determine if the file exists. Importer will automatically create a new file and will not merge files with identical indexes.

### **Data Connector**

File information will be added directly to the FileBound database. No security will be applied and workflow actions will not be enacted if being used. Imported documents will be added directly to the FileBound document storage location.

### **New Documents**

Use this setting when the documents that are being imported are new documents with FileBound.

### **Do Not Always Assume New Document**

Use this setting when uploading documents to a specified DocumentID. This is primarily used for updating E-Forms with a new document when the DocumentID is known.

### **Replace Document Using DocID Barcode**

Use this setting when an imported document contains a DocID barcode. The barcode will be recognized and read. When the document is uploaded FileBound will locate the existing document and replace that document with the imported document. If revisions are enable for the project then the imported document will become a revision of the currently stored document.

### **Retry File Saves and Retry Doc Saves**

If a File or Document fails to upload for any reason, these settings will dictate how many times the upload is retried before an error is displayed.

## **Verifying Barcodes**

Verify Barcodes module is used to check an input image for barcode processing. It checks if the image file has barcodes present in the image before processing it. It checks the barcode image as per multiple settings configured in the module.

## *Configuring Settings for Verifying Barcodes*

The Verifying Barcodes module has multiple sections for verifying barcodes.

- Verifying barcodes in the document
- Looking for barcodes in standard file, divider, separator and Eform formats
- Setting actions upon successful or failed verification
- Exporting a file

### **Configuring the Main Settings**

Perform the following steps to configure the main settings of the Verifying Barcodes module:

1. Select **Verify Barcodes** module in the Configure pane.
2. Select **All pages have barcodes** option to check if the barcode image is present on all pages of the document.  
OR
3. Select **One or more pages have barcodes** option to check if the barcode image is present on one or more pages of the document.
  - i. Select **First Page Only** check box if you want to check the first page of the document for barcode image.  
OR
4. Select **No pages have barcodes** to skip the checking for barcode images in the document.
5. Select **Standard File** check box in the Look for Barcodes pane to look for barcode images in the standard FileBound 00F00 format.
6. Select **Standard Divider** check box in the Look for Barcodes pane to look for barcode images in the standard FileBound divider 00F00 format.

7. Select **Standard Separator** check box in the Look for Barcodes pane to look for barcode images in the standard FileBound separator 00F00 format.
8. Select **Eform DocId** check box in the Look for Barcodes pane to look for barcode images in the FileBound Eform format.
9. Select **Run actions upon successful verification** option in the Action Settings pane to perform actions after barcode verification is successful.  
OR
10. Select **Run actions upon failed verification** option in the Action Settings pane to perform actions after barcode verification is failed.
11. Select the **Export file** check box in the Actions pane for error processing.
  - i. Select the path for exporting the file.
12. Select **Add Value to Dictionary** check box in the Actions pane.
  - i. Specify 'Variable' in the **Variable** box.
  - ii. Specify 'Value' in the **Value** box.
  - iii. Select **Scripted** check box if you want to use scripting function for adding value to dictionary.  
The scripting function requires a Custom Script module or Globally Shared Functions module configured for using this function.
13. Select **Run Child Modules** check box to ensure barcodes are verified correctly.  
Add the Barcode Processing module under the Verify Barcodes module in the hierarchy to ensure the barcodes are verified before processing.
14. Click the **Save** button in the button panel.

## Configuring the Advanced Settings

Perform the following steps to configure the advanced settings of the Verifying Barcodes module.

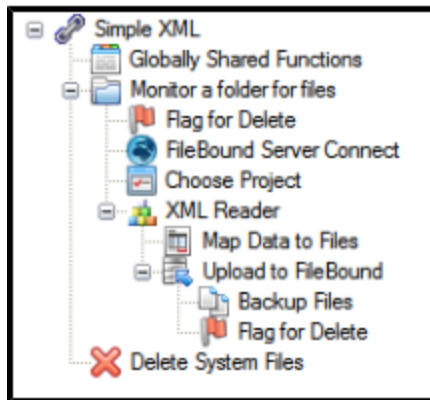
1. Click .

The **Advanced Settings** dialog opens.

2. Specify the name of the 'Business Variable' in the **Input Business Variable** box.
3. Specify the name of the 'Project Variable' in the **Input Project Variable** box.
4. Specify the name of the 'Business Variable' in the **Input File Variable** box.
5. Click **OK** to save.
6. Click the **Save** button in the button panel.

## XML Processing

Provides support to process XML (Extensible Markup Language) data. This type of data is often used in any place that needs a standards based method of storing or transmitting information in a structure method that can be readily accessed in many ways. Importer Pro can be used to capture this data, parse any breaking conditions that would identify unique files and pages within the captured input file and then upload the parsed information into a FileBound server.



## Configuring XML Reader Settings

You can configure the **XML Reader** module after adding the XML Reader module to a configuration.

### Configuring the Main Settings

Perform the following steps to configure the processing settings:

#### *Nodeset*

1. Select **XML Reader** in the selected configuration
2. Within the **Nodeset** field enter the XPath expression that is used to select the nodeset. This is normally used to define the document images to be uploaded.

#### *DataStrings*

The DataStrings area is used to identify the information that will be imported. This information can be used to identify the images to be imported, information for indexing and information to be used for dividers, separators, document notes, etc.

1. Click the **Add** button to add a new DataString
2. Select the DataString that will be used to store the identified information
3. Within the **XPath** field enter the conditions that will identify and location the information to be extracted, click **OK** when finished.
4. Repeat Steps 1 and 2 until all necessary information locations have been added.

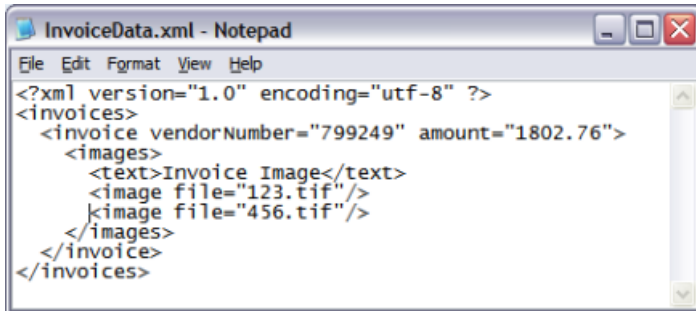
**Note: Note:** *DataStrings can also store information to be used for file notes, document notes, dividers, and separators, etc. It is not limited to just index fields.*

## Example Configuration

In the example below a directory named "invoices" contains an XML file named "InvoiceData.xml" and two .tif images named, "123.tif" and "456.tif". The XML file contains a Vendor Number and Invoice Amount and information about the images associated with that data.

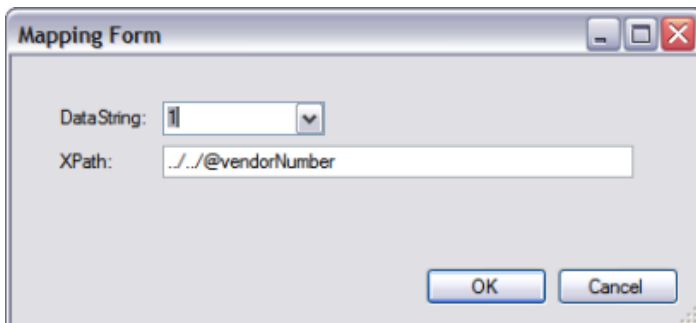
When imported a new file will be created and indexed entering the Vendor Number into FileBound Index Field 1 and Invoice Amount into FileBound Index Field 4 and place the imported images into a divider labeled "Invoice Image".

### Example XML File Structure



```
InvoiceData.xml - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8" ?>
<invoices>
  <invoice vendorNumber="799249" amount="1802.76">
    <images>
      <text>Invoice Image</text>
      <image file="123.tif"/>
      <image file="456.tif"/>
    </images>
  </invoice>
</invoices>
```

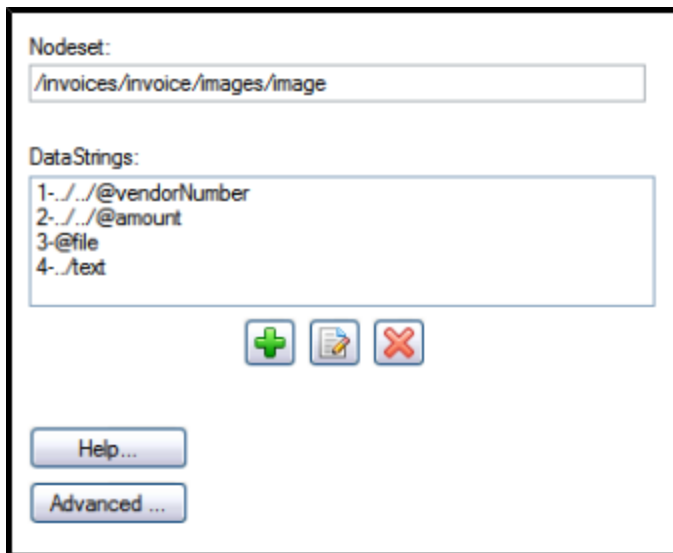
### Example XML Reader Module Setup



Mapping Form

DataString:

XPath:



## Example Map Data to Files Module Setup

Mappings:  
Field1  
Field4  
Document

Field Info: 1 Invoice Number

Field Value: DataString1

Scripted

Mappings:  
Field1  
Field4  
Document

Source: DataString3

Use Variable Content as Binary Data

Divider: DataString4

## Configuring the Advanced Settings

Perform the following steps to configure the advanced settings of the chosen project:

1. Click .

Advanced

Input Filename Variable:  
FileName 1

OK Cancel

## ERM Processing

### XML Processing

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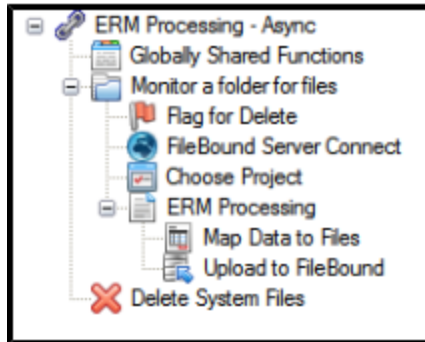
The **Advanced** dialog opens.

2. Specify the name of the 'Business Variable' in the **Input Filename Variable** field.
3. Click **OK** to save.
4. Click the **Save** button in the button panel.

## ERM Processing

Importer Pro provides support to process ERM (Enterprise Report Management) data. This type of data is often used in banking reports, customer invoicing and billing, and in any place that streams of data might be sent to a printer and printed on pre-printed forms. Importer Pro can be used to capture this data, parse any breaking conditions that would identify unique files and pages within the captured input file and then upload the parsed information into a FileBound server.

The ERM Processing Module can be used as a single module in the configuration chain or multiple modules can be used within the configuration to perform more complex functions. Adding additional ERM Processing modules as children of a Parent ERM Processing module will allow a secondary level of processing. An unlimited number of levels of processing can be configured using this method.



### Configuring ERM Processing Settings

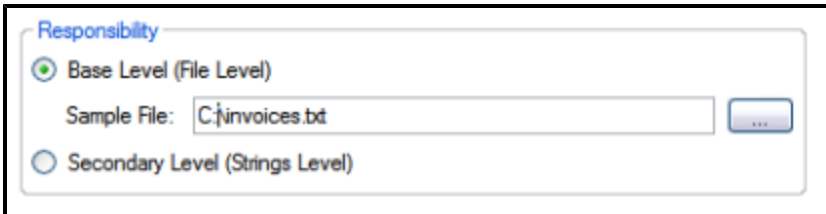
You can configure the **ERM Processing** module after adding the **ERM Processing** module to a configuration.

#### Configuring the Main Settings

Perform the following steps to configure the processing settings:

##### Responsibility

1. Select the configuration in the Importer Pro window
2. Add the **ERM Processing** module to the configuration
3. Select **ERM Processing** in the selected configuration
4. Within the Responsibility section select the level of processing
  - a. Base Level (File Level) is the most basic segment and is used to identify a single "Page" to be uploaded to FileBound
  - b. Secondary Level (Strings Level) is a secondary level of break conditions and is used to create a subset of content within a main base level. This is used when you have a need to identify multiple pages within a single file.
5. Select the Browse button and enter a sample file to be used to setup break conditions



##### Content Options

1. Within the Content Options section select a Break Condition by clicking on the **Select Dynamically** button, the sample file selected from within the Responsibility section will be displayed.

2. Highlight the text to be used for the Break Condition, whenever Importer Pro detects this condition a new break will be created. When finished click **OK**.
3. Make any necessary break condition adjustments by selecting the line that the break will occur on based on the break condition that was set. Within the Starts on field select the number of lines to adjust the break and then select if the adjustments should be made in a backward or forward direction from the break condition.

**Content Options**

Break Condition:  ...

Starts on:  line(s)

Level Length:  (optional)

Content DataString:  (optional)

*In the example above a break will be created  
10 lines before the word "INVOICE".*

9. If a more advanced break condition needs to be created you can click on the Advanced button next to the Break Condition field and manually enter the Break Condition.
10. If the break condition always occurs at a given number of lines in the imported file you can enter the number of lines in the **Level Length** field.
11. Select a Content DataString to store the parsed information that is identified with the break condition. If you are unsure use a value of 25.

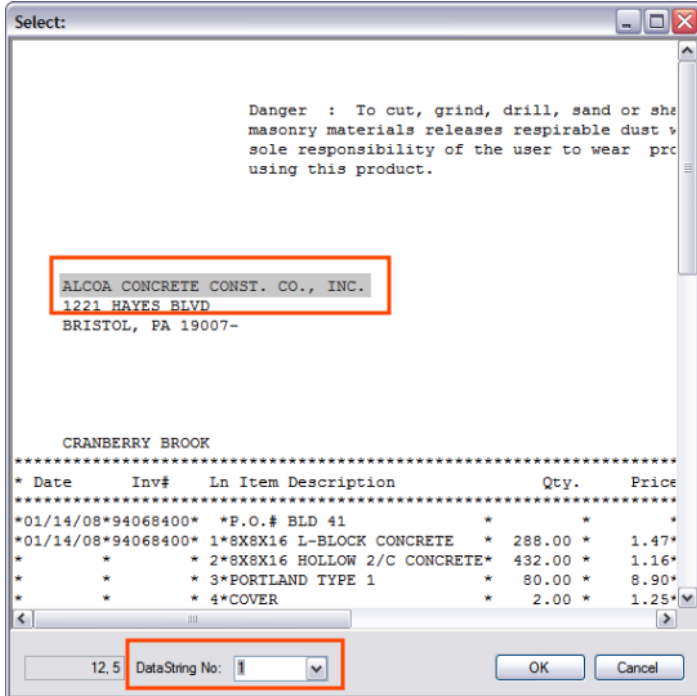
## **Fields**

1. Click the **Add** button to add a location to use extract information to be used for indexing the file and documents

## ERM Processing

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2. Click **Yes** to select to use the wizard to select the field. You may select **No** if you know exactly the information to enter to specify the location to extract the information.

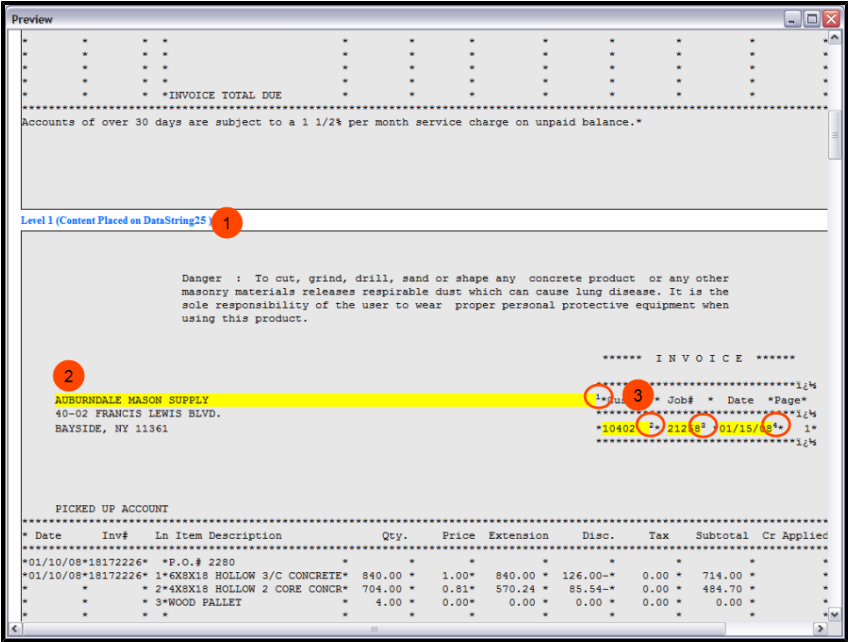


3. Highlight the area of the document that information will be extracted from
4. Select the DataString No that the information should be stored on
5. Repeat Steps 1-4 until all necessary information locations have been added. Click **OK** when finished.

**Note: Note:** Field information can also store information to be used for file notes, document notes, dividers, and separators, etc. It is not limited to just index fields.

## Preview ERM Processing Settings

After entering settings to determine how the ERM data will be processed the Preview button can be used anytime if a Sample File has been selected. The preview will display where breaks will be created based on the Break Condition that was entered, field information will be highlighted and indicate the DataString where the extracted data will be stored.

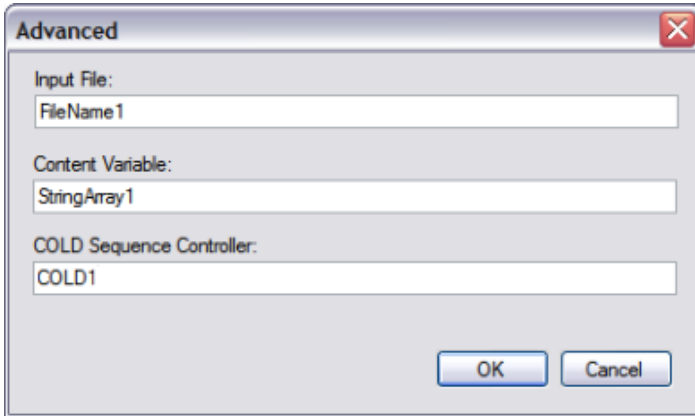


1. Level Break - Indicated that it is stored on DataString 25
2. Location to extract information for Field 1
3. Subscript numbers indicating the fields that the information will be extracted for

## Configuring the Advanced Settings

Perform the following steps to configure the advanced settings of the chosen project:

2. Click .



The **Advanced** dialog opens.

3. Specify the name of the 'Business Variable' in the **Input File** box.
4. Specify the name of the 'Content Variable' that the module may pass to other modules in the **Content Variable Name** box.
5. Specify a COLD Sequence Controller Number to indicate the order the process should be performed.
6. Click **OK** to save.
7. Click the **Save** button in the button panel.

## Mapping Index and Document Data

After configuring the ERM Processing module to indicate how the data should be broken apart and located for data extraction you will need to use the Map Data to Files module to map this data to the proper locations within FileBound.

## *Adding Mappings*

Within the Mappings area a **Document** mapping will already be created. You will need to add additional Field mappings for all of the fields that you selected to extract within the ERM Processing module.

Perform the following steps to map the ERM Processing module fields to Index Fields within FileBound.

1. Click the **Add Mapping** button
2. Select Field, click **OK**
3. Highlight the newly added field in the mapping area
4. Within the Field Mapping info area select the DataString value that should be used to populate the index field.

**Note: Note:** *If the Authenticate button on the FileBound Server Connect module was used at the beginning of the configuration then Importer Pro has acquired the FileBound project information and will populate the name of the index field next to the Field Info number.*

5. Repeat Steps 1-4 for all necessary fields
6. Select **Document** within the list of Mappings
7. From the **Source** drop-down menu select the DataString value that was used to store the document information from the ERM Processing module in the **Content DataString** drop-down
8. Make sure that **Use Variable Content as Binary Data** is selected.
9. Enter other necessary document information such as divider or separator that the document will be associated with. This can be information obtained from a DataString or manually entered to be used as a static value for all imported documents
10. Within the Extension field verify that **TXT** is entered.

For additional information on configuring the Map Data to Files module, see "Configuring Mapping Data" on page 99

## *Previewing Upload*

Within the Upload to FileBound module the data to be processed can be previewed before being uploaded to FileBound. This preview will show the individual files that are created along with any page separations for the file, and the how the file will be indexed. The preview will also indicate the divider and separator that the document will be stored within after being uploaded.

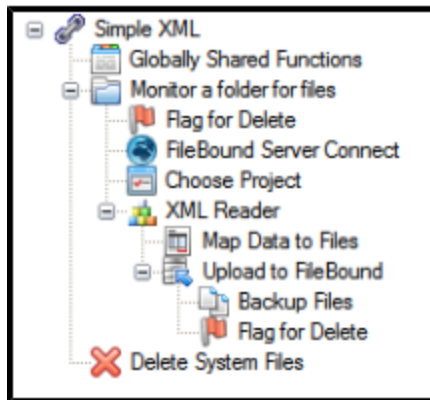
If changes need to be made the modules can be edited and the preview can be rerun. This will prevent data being uploaded to FileBound that may improperly processed.

For more information on how to configure the Upload to FileBound module, see "Configuring Upload Settings" on page 111.

**Note: Note:** *When using the preview button it is recommended that you will be importing a large amount of data that you use a subset of this data to configure the import process and use in the preview.*

## XML Processing

Provides support to process XML (Extensible Markup Language) data. This type of data is often used in any place that needs a standards based method of storing or transmitting information in a structure method that can be readily accessed in many ways. Importer Pro can be used to capture this data, parse any breaking conditions that would identify unique files and pages within the captured input file and then upload the parsed information into a FileBound server.



## XML Configuration Setup

Importer Pro provides a template to use to start the basic setup to import XML data. The following steps should be used to setup a basic XML import.

### *Create New Configuration*

1. Click the **Add** button at the bottom of the list of configurations in the bottom left corner of the application window
2. Click **Other Templates** to display the advanced list of Importer Pro templates
3. Select **XML Data Import** from the list of Configuration Types then click **OK**
4. Enter a **File name** for the configuration, this is the name that will be used to identify the configuration within the list of configuration on the left sidebar of the application, click **Save** when finished

**Note: Note:** *The configuration file will need to be located within the configs directory that is contained in the root Importer Pro directory. The default location for this is:*  
*C:\Program Files\FileBound\ImporterPro\Configs*

### *Edit Configuration*

1. Select the configuration within the list of configuration files on the left side of the application window
2. Proceed through the list of modules that make up the configuration, enter necessary information into each module that requires additional information for the module to perform correctly
3. Within the **XML Reader** module specify the **Nodeset** and the **DataS-trings** to be used to identify the individual nodes of information or segments of information within the file being imported. For more information on how to configure this module, see "Configuring XML Reader Settings" on page 120
4. Click the **Save** icon in the middle button bar to save any changes that are made to the configuration.

## Mapping Index and Document Data

After configuring the XML Reader module to indicate how the data should be broken apart and located for data extraction you will need to use the Map Data to Files module to map this data to the proper locations within File-Bound.

### *Adding Mappings*

Within the Mappings area a **Document** mapping will already be created. You will need to add additional Field mappings for all of the fields that you selected to extract within the XML Reader module.

Perform the following steps to map the XML Reader DataString fields to Index Fields within FileBound.

1. Click the **Add Mapping** button
2. Select Field, click **OK**
3. Highlight the newly added field in the mapping area
4. Within the Field Mapping info area from the **Field Value** field select the DataString value that should be used to populate the index field.

**Note: Note:** *If the Authenticate button on the FileBound Server Connect module was used at the beginning of the configuration then Importer Pro has acquired the FileBound project information and will populate the name of the index field next to the Field Info number.*

5. Repeat Steps 1-4 for all necessary fields
6. Select **Document** within the list of Mappings
7. From the **Source** drop-down menu select the DataString value that was used to store the document information from the XML Reader module.
8. Enter other necessary document information such as divider or separator that the document will be associated with. This can be information obtained from a DataString or manually entered to be used as a static value for all imported documents.

## XML Processing

### Mapping Index and Document Data

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For additional information on configuring the Map Data to Files module, see "Configuring Mapping Data" on page 99

## *Previewing Upload*

Within the Upload to FileBound module the data to be processed can be previewed before being uploaded to FileBound. This preview will show the individual files that are created along with any page separations for the file, and the how the file will be indexed. The preview will also indicate the divider and separator that the document will be stored within after being uploaded.

If changes need to be made the modules can be edited and the preview can be rerun. This will prevent data being uploaded to FileBound that may improperly processed.

For more information on how to configure the Upload to FileBound module, see "Configuring Upload Settings" on page 111.

**Note: Note:** *When using the preview button it is recommended that you will be importing a large amount of data that you use a subset of this data to configure the import process and use in the preview.*

## Scheduling Configurations

This section will outline the basics to setup a new schedule to be used by FileBound Importer Pro to perform the actions specified in the selected configuration files.

### Creating a Scheduled Task

Scheduling a configuration to run at a pre-determined time is the most common way that FileBound Importer Pro is used.

1. On the **Schedule** tab click the **Add Schedule** button located in the right sidebar. The Scheduled Task window will now be displayed.
2. On the **Task** tab enter a network user for the application to use to perform the scheduled task. This is defaulted with the user that is currently logged into the PC that is running Importer Pro. If the import location that is being monitored is located on a different machine than the one running Importer Pro, a Domain User or Domain Admin User will need to be used within the Run As field.
3. Click **Set password** and enter and confirm the password for the network user that was entered in step 2, click **OK**.

**Note: Note:** You **MUST** perform Step 3 and enter a password even if you plan to use the user that was defaulted in the Run as field.

4. On the **Schedule** tab click **New**. Select the criteria for when the task will be performed.
5. Clicking the **Advanced** button will provide additional settings to further refine when the schedule will be executed.
6. When finished click **OK**. The task will now appear within the main Schedule tab in Importer Pro.

## Editing a Schedule

Configuration schedules can be edited at any time. Editing a schedule will allow an administrator to alter when a configuration is performed without the need to delete the configuration and recreate a new one.

On the **Schedule** tab select the configuration to be edited. Click the **Edit Schedule** icon in the right sidebar. The Task Scheduler window will open and allow you to edit the schedule. When finished click **OK**.

## Manually Starting a Scheduled Task

It may be necessary to run a scheduled task before the scheduled time. This can be done using the **Run Schedule now** icon in the right sidebar.

On the **Schedule** tab select the schedule to be run, then click **Run Schedule now** in the right sidebar. The schedule will be immediately performed.

## Deleting a Scheduled Task

A scheduled task can be deleted. On the **Schedule** tab select the schedule to be deleted and click the **Delete Schedule** icon in the right sidebar.

**Note: NOTE:** *When clicking the Delete Schedule button you will not be prompted to confirm that you want to delete the schedule. The schedule will be deleted as soon as the button is clicked.*

## Importing Unindexed Documents

You can import unindexed documents to FileBound by specifying a document's related project ID and setting the document status as unindexed.

Perform the following steps for importing unindexed documents into FileBound:

1. Add a new chain from the **Configure** pane.
2. Select the configuration file in the **Configure** pane.

The 'Chain Configuration' is loaded with pre-grouped modules.

3. Select the **FileBound Server Connect** module in the **Configure** pane.
4. Specify the URL for a server and user credentials in the **FileBound Server Connect** module.
5. In the **Choose Project** module, do not specify the project details. The project details are specified in the **Map Data to Files** module.
6. In the **Monitor a folder for files** module, specify the folder you want to monitor for importing the document.
7. In the **Backup Files** module, specify the folder where you want to place a back up of the imported documents.
8. In the **Map Data to Files** module, select "Document" item from the mapping item list.
9. Select **Unindexed** option from the Status list.

A dialog opens with a message to set the 'Related Project ID' for the selected unindexed status.

10. Click **OK** in the dialog.
11. Specify the 'Related Project ID' in the **RelateProjID** list. This is the ProjectID number of the FileBound project that the documents will be

## Importing Unindexed Documents

### Deleting a Scheduled Task

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uploaded into in FileBound. The ProjectID can be determined using the FileBound server Admin Utility.

12. In the **Upload to FileBound** module, click **Advanced**
13. Select **Do Not Save Files**, click **OK**
14. Click the **Save** button in the button panel.
15. Click from the button panel located at the top of the Importer Pro window to start importing unindexed documents to FileBound.

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