



Upload Agent V3.0.20

User's Guide

© Copyright 2011

All other trademarks are property of their respective owners.

The contents of this User's Guide are subject to change without notice.

Visit www.documentmall.com/user for the latest version of this documentation.

Contents

INTRODUCTION..... 3

KEY PRODUCT FEATURES 4

UPLOAD AGENT DOWNLOAD AND INSTALLATION 4

Runs as a Windows Service..... 4

UPLOAD AREA 5

SETTING UP UPLOAD AGENT..... 7

General 7

Accounts..... 8

Update Options..... 9

 Upload Control..... 9

 Batch Control 9

 Monitor Schedule..... 9

Folder Path Settings 10

Proxy..... 10

UPLOAD AGENT MAIN WINDOW 11

Successful Tab..... 11

Pending Tab..... 12

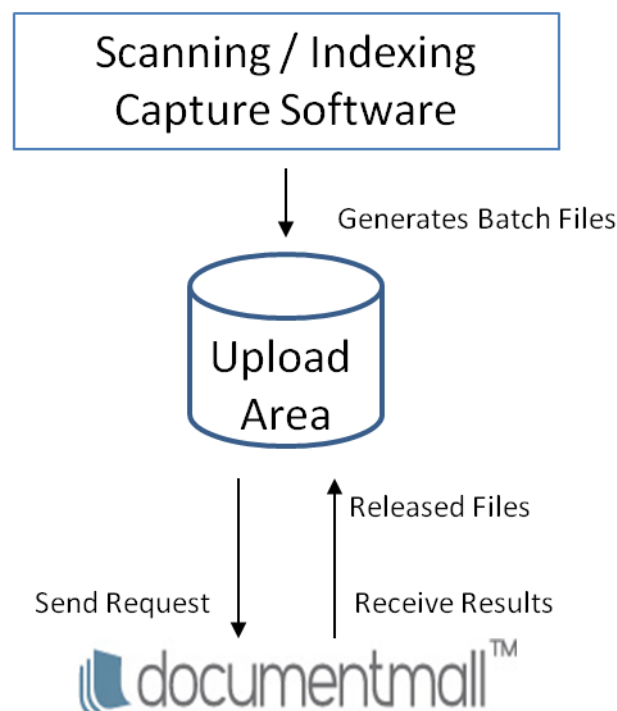
Failed Tab..... 13

VIEW SERVICE LOGS..... 14

Introduction

DocumentMall Upload Agent is an ideal solution for high volume scanning, conversion and storage of paper documents. DocumentMall Upload Agent provides the ability to use any input source to capture multiple documents of various types for transfer to a DocumentMall account for storage and management. Used in conjunction with a scanner or MFP and document capture software such as NSI AutoStore or Kofax Ascent Capture, the Upload Agent provides reliable and secure transmission of large batches of scanned documents and XML metadata to a DocumentMall account and provides upload process monitoring and management.

The following diagram depicts the data flow of the Upload Agent:



DocumentMall Upload Agent provides the ability to use any input source to capture multiple documents of various types for transfer to a DocumentMall account for storage and management.

Key Product Features

Key features of the Upload Agent:

- It runs as a Windows Service
- Monitor progress via GUI monitor application
- Support upload to multiple accounts
- Support Multi Document Batch upload
- Account validation
- Access via Proxy server with Authentication
- Improved progress status and information in user interface
- Improved error reporting and logs
- Resubmit batch with error from user interface
- Auto recovery when error occurs during upload
- Support both attribute1 and named (DocType) attribute values

Upload Agent Download and Installation

Upload Agent is included with the purchase of DocumentMall Extensible for 3rd Party Solution subscription service (SMB or Enterprise). It requires the purchase of a 3rd party app and Professional Services.

The Upload Agent program can be accessed and downloaded from the DocumentMall website: <http://www.documentmall.com/user-resources/>. Select **Options** from this page, and click the Upload Agent Download link. Once the file is downloaded, follow the installation instructions to install the program. You may elect to change the folder location of the installed files.

Runs as a Windows Service

The DocumentMall Upload Agent runs as a Microsoft Windows service. Depending on its use, you can choose to Startup the Upload Agent Windows service as automatic or manual. In cases where Upload Agent runs in server rooms where a nightly reboot occurs, it's imperative for the Upload Agent to re-launch and continue uploading without user login.

Upload Area

The Upload Agent, by default, gets installed in the users program files directory. After it's installed and configured, the folder structure resembles the follow example.



The Batch.xml is the unique batch ID generated by the scanning solution. It's assumed that all scanning solutions either have or are capable of generating a unique batch ID. Contents of each batch directory must conform to these requirements.

Document files are placed in the batch directory, for example, *.TIF, *.DOC, etc. The batch control file (batch.xml by default but user definable) must be present in the directory during processing. Each batch file can contain information for multiple document files. The batch control file contains document indexing information, permission information, and folder links (path(s) on the DocumentMall account in which the documents will be uploaded to).

This version of Upload Agent supports Attribute and DocType naming conventions.
View/Edit Batch File **Attribute** Example:

```
<batch>
<header>
<batchid>13</batchid>
<date>12/23/2010</date>
<user>olakra</user>
<docbase>mybeta</docbase>
<source>Capture</source>
</header>
<body>
<document>
<name>invoice13.pdf</name>
<title></title>
<desc></desc>
<keywords/><authors/>
<securitykey>Everyone Read</securitykey>
<folderlinks><path>/mark</path></folderlinks>
<doctype>
  <name>markinvoice</name>
  <index>
  <iname>attribute1</iname>
  <ivalue>CompanyXYZ</ivalue>
  </index>
  <index>
  <iname>attribute2</iname>
  <ivalue>2456458</ivalue>
  </index>
  <index>
  <iname>attribute3</iname>
  <ivalue>10/28/2008</ivalue>

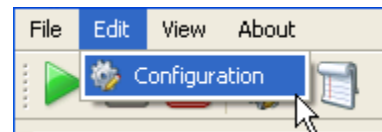
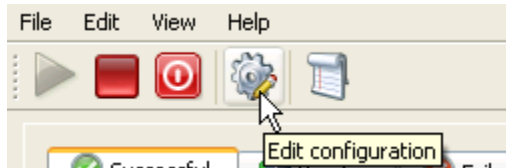
</index></doctype><content><file><fname>Doc56.pdf</fname><format>pdf</format></file></content>
</document>
<document>
<name>invoice133.pdf</name>
<title></title>
<desc></desc>
<keywords/><authors/>
<securitykey>Everyone Read</securitykey>
<folderlinks><path>/mark</path></folderlinks>
<doctype>]
  <name>markinvoice</name>
  <index>
  <iname>attribute1</iname>
```

DocType Naming Convention Example:

```
-<doctype>
<name>patient_record</name>
-<index>
<iname>PatientName</iname>
<ivalue>NewTest</ivalue>
</index>
-<index>
<iname>Insurance</iname>
<ivalue>HMO2</ivalue>
</index>
-<index>
<iname>AdmissionDate</iname>
<ivalue>08/27/2009</ivalue>
</index>
</doctype>
```

Setting up Upload Agent

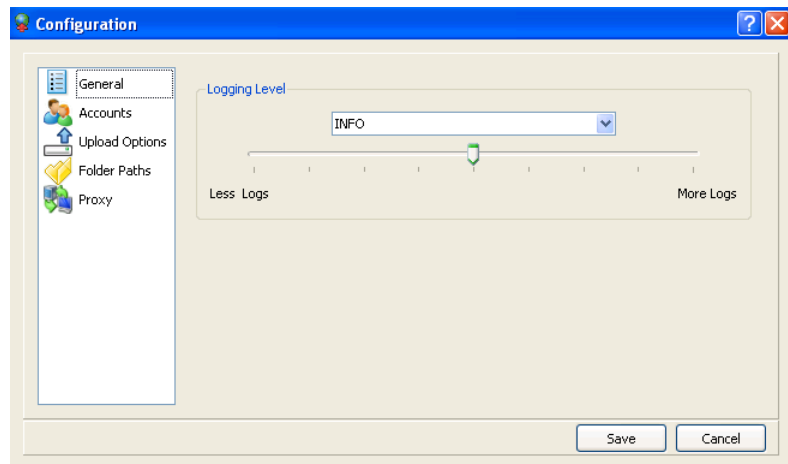
To set up Upload Agent, start by defining the settings under Edit/ Configuration. Upload Agent settings can be created or edited by clicking on the Edit option in the Task Bar, or clicking the Edit Configuration icon as illustrated below.



The configuration screen appears and allows you to define or edit the following:

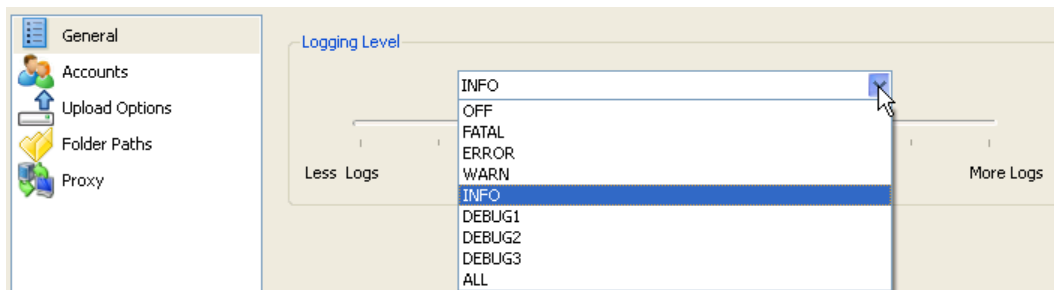
- General Options
- Accounts
- Upload Options
- Folder Paths
- Proxy

Each one of these options will be discussed.



General

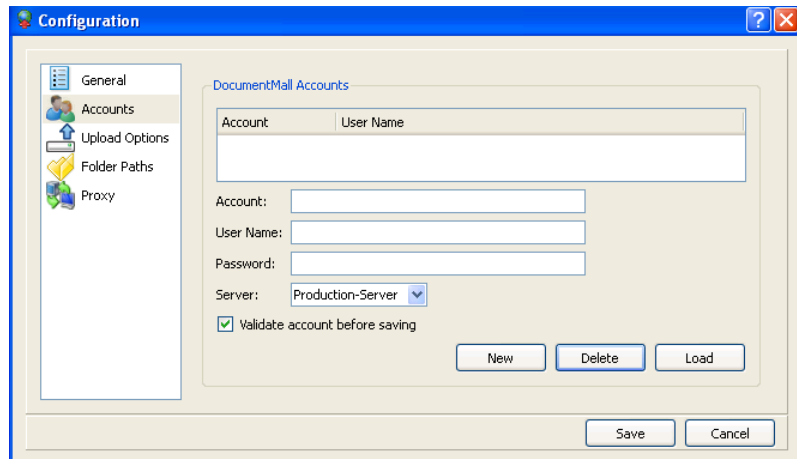
In the “General Options” settings screen, the user can slide the log level (Less Logs to More Logs) to determine what level of logs messages are recorded.



Accounts

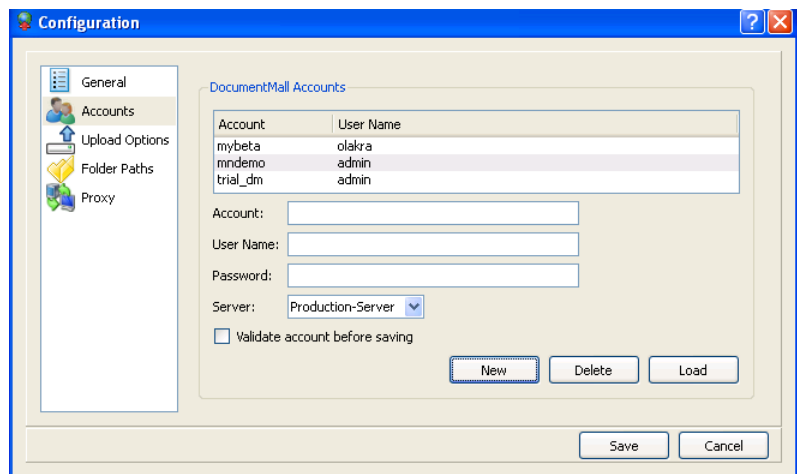
If you are uploading files for different/multiple customers, you can add more than one account.

Conversion bureaus that upload files for multiple customers are likely to add multiple accounts.



To setup a new account:

1. Type in the DocumentMall Account name, User Name and Password.
2. Select Production or Beta Server type where the DocumentMall is located.
 - a. Beta Servers are usually reserved for beta test customers.
 - b. Commercial accounts should select Production-Server.
3. Validate account before saving.
4. This option allows you to check that the DocumentMall account and server type are active and validated.
5. Click the Load button. The account name will display in the Account area.
6. Click Save after entering the Account(s)



To Add additional accounts:

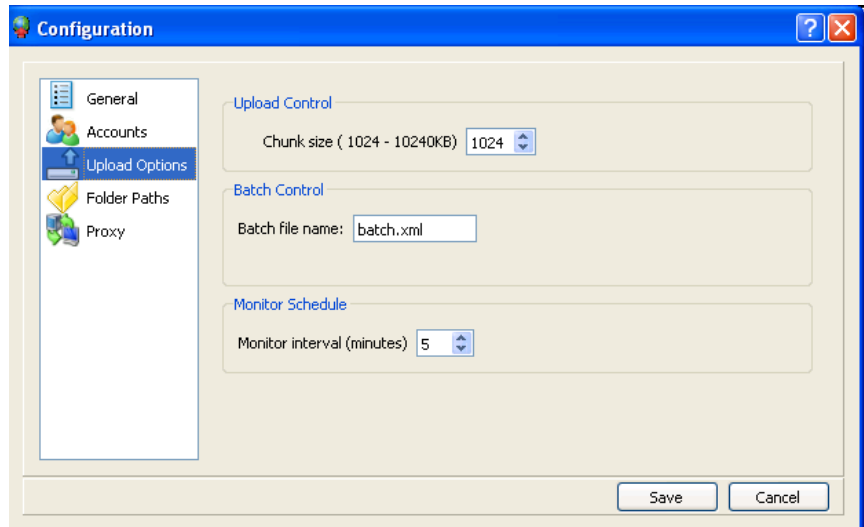
7. Click the New button to clear the Account, User Name and Password field information.
8. Follow steps 1-6 above.

To Delete an account, select (Highlight) the account to delete and click the Delete button.

Update Options

In the Upload Options area, a user can configure settings related to uploading behavior that include:

9. Upload Control
10. Batch Control
11. Monitor Schedule



Upload Control

Chunk upload Size

A batch is broken up into 1MB chunks by default for more fluid file transfer.

Chunk upload is something that may need to be fine tuned per customer installation, and be set depending on Internet connection, file types or size.

Increasing the chunk size may make uploads faster, but stability versus performance needs to be evaluated.

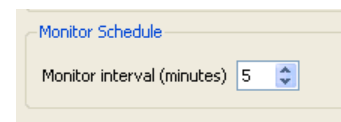
Batch Control

In the Batch control area, a user can configure the batch xml file name. The application will find the specific files by the names defined by this option to get information of uploading and result.

The default file name is batch.xml. The Batch file name is Case Sensitive.

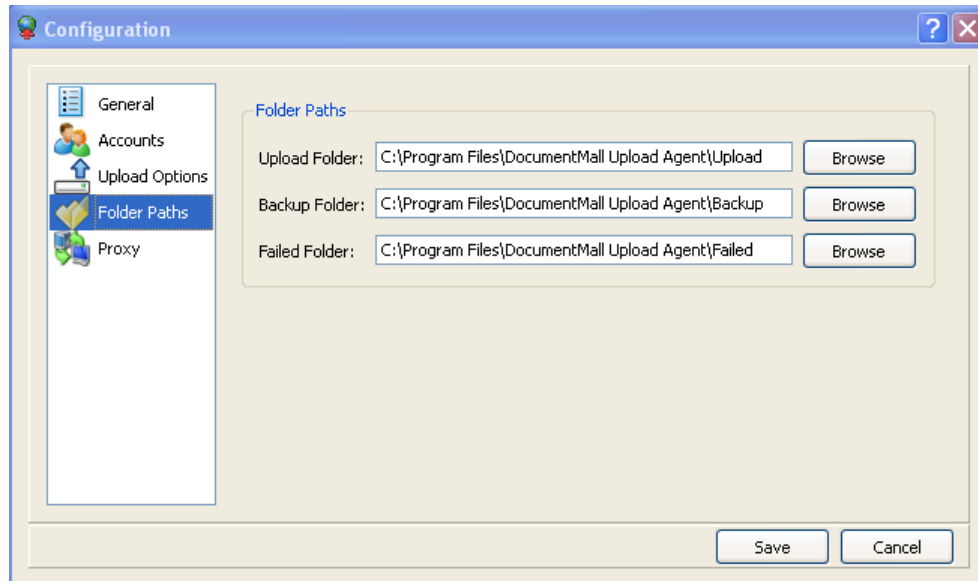
Monitor Schedule

The Monitor interval setting defines the time interval on how often Upload Agent checks the upload directory for new batches.



Folder Path Settings

- Upload Folder specifies the location of the upload directory. The upload agent polls the upload directory looking for batches to be uploaded.
- Backup Folder specifies where successful batches will be moved.
- Failed Folder specifies the location where failed upload batches are placed.



Proxy

The image shows a 'Proxy' configuration section. It starts with a checked checkbox 'Use Proxy'. Below it are several fields: 'Proxy Type:' with a dropdown menu showing 'Transparent HTTP' and 'Socks 5'; 'Proxy Server:' with a text box; 'Port Number:' with a text box containing '8080'; 'Username:' with a text box; 'Password:' with a text box; and 'Server:' with a dropdown menu showing 'Production-Server'. A 'Test Connection' button is located at the bottom right.

Proxy hosted by 3rd party company in between DocumentMall and them.

Proxy Type: (Protocol): Transparent HTTP or Socks 5

Proxy Server: IP address or domain name of local proxy server

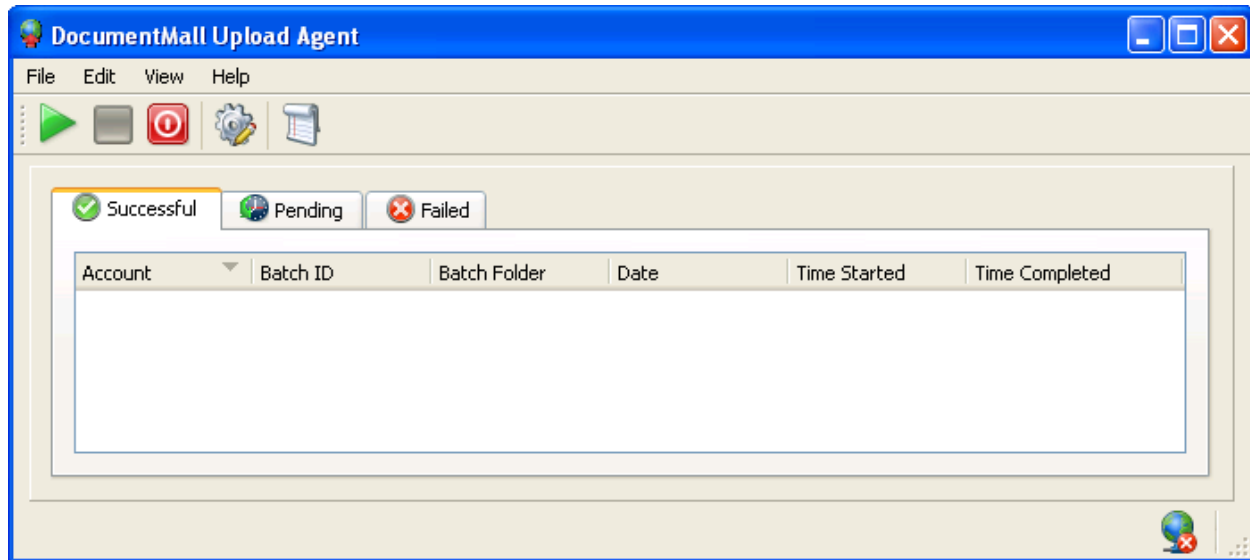
Port Number: Port Number of proxy

Username and Password for proxy access:

Server: This field is used strictly for testing purposes, and allows a Proxy server to test connection to DocumentMall.

Upload Agent Main Window

After configuring the application, the application can be launched. The DocumentMall Upload Agent main page will display and be used to monitor upload events. Successful, Pending and Failed uploads can be monitored from this screen.



- The Account column is the name of the DocumentMall account used for this upload.
- The Batch ID is the name of file that's uploaded during the capture process.
- The Batch folder is the location of the captured batch files.
- The Date, Time Started and Time Completed columns are time stamps of the capture process.

Each tab shows the information of current running task(s) with different status.

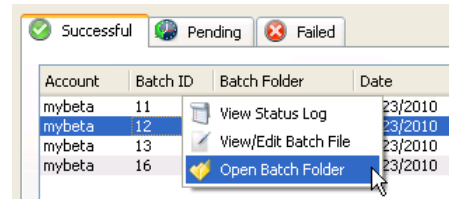
Successful Tab

The tab named "Successful" shows the batches which upload successfully.

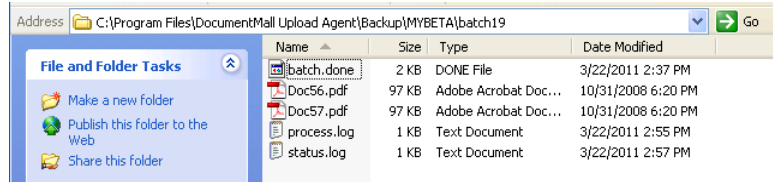
Account	Batch ID	Batch Folder	Date	Time Started	Time Completed
mybeta	11	C:/Program Files/...	12/23/2010	2011/03/23 11:1...	2011/03/23 11:13:07
mybeta	12	C:/Program Files/...	12/23/2010	2011/03/23 11:1...	2011/03/23 11:13:15
mybeta	13	C:/Program Files/...	12/23/2010	2011/03/23 11:1...	2011/03/23 11:13:23
mybeta	16	C:/Program Files/...	12/23/2010	2011/03/23 11:1...	2011/03/23 11:13:34

Successful information columns can be sorted based on the **column title** by left clicking on the title heading and selecting the direction of the sort.

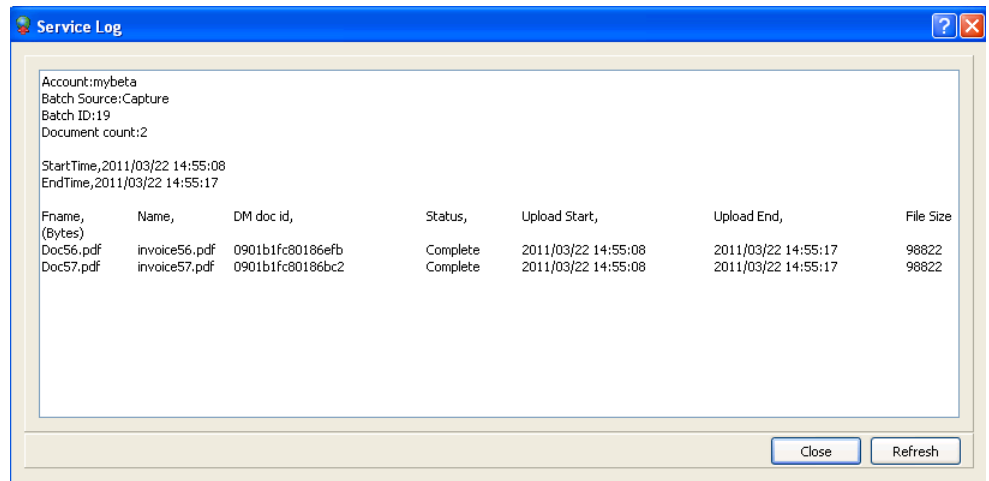
The user can right click an individual successful entry to view the Status Log, view or edit the batch file, or open the batch folder. (See Examples below).



Example of Batch Folder.



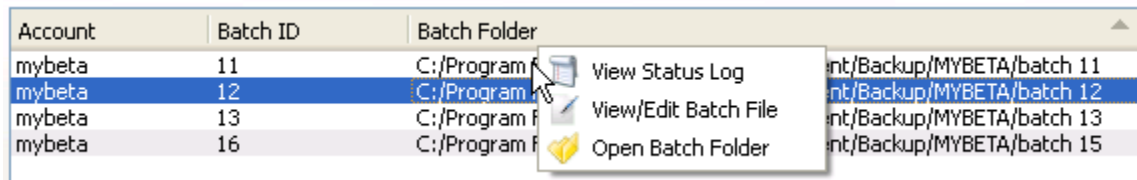
Example of View Status (Service) Log.



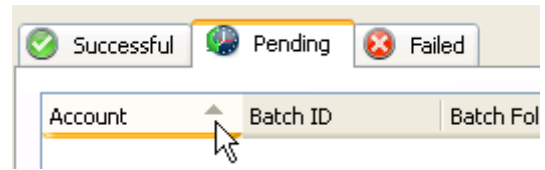
Pending Tab

All tasks that are started and waiting for upload appear in the Pending tab.

The user can view, edit or open a pending batch.xml by right clicking and selecting one of those three options.



Pending Information columns can be sorted based on the **column title** by left clicking on the title heading and selecting the direction of the sort.



Failed Tab

The “Failed” tab lists failed batch uploads. Some batches can be partially uploaded. If some documents fail to be uploaded, the batch is displayed in the Failed tab area.

Account	Batch ID	Batch Folder	Date	Time Started	Time Completed	Additional Info
mybeta	14	C:/Program Files/DocumentMall Upload Agent/Failed/MYBETA/batch 14	12/23/2010	2011/03/23 11:1...	2011/03/23 11:1...	File Not Found.
mybeta	16	C:/Program Files/DocumentMall Upload Agent/Failed/MYBETA/batch 16	12/23/2010	2011/03/23 11:1...	2011/03/23 11:1...	The permission set is invalid.

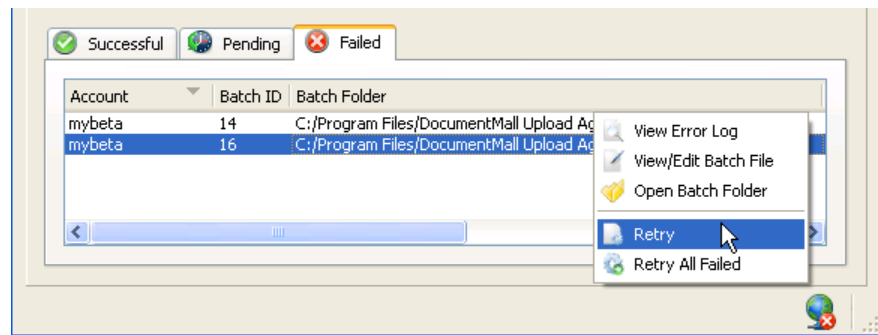
Failure reason message will be displayed in the column “Addition Information”. This piece of task will be shown in the “Failed” tab.

Failed Information columns can be sorted based on the **column title** by left clicking on the title heading and selecting the direction of the sort.

The user can right click an individual failed entry to perform the following:

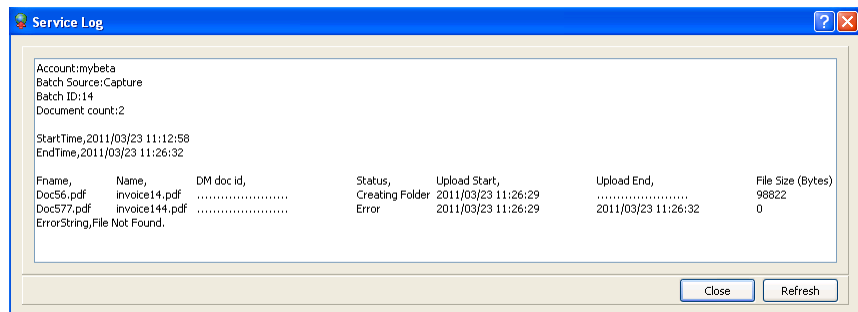
- View Error Log
- View/Edit the Batch File
- Open Batch Folder
- Retry (Selected upload)
- Retry **All** Failed uploads

(See Example below).



The Retry Option allows you to resubmit failed batches. When they are resubmitted, they go into a pending state and are reprocessed.

View Error Log Example



View Service Logs

Service logs display information regarding upload conditions. Specific error messages can provide details that can help you resolve failed uploads.

Services logs can be viewed, either by selecting View and Service Log from the Task Bar, or by right clicking on a file from the Successful or Failed tabs.

