

Summary

The Document Import Service is a Windows Service that monitors one or more folders for documents and imports them into Document Manager (DM).

Documents can be any type of document supported by Document Manager and must have an associated index file (XML) that defines how the document is to be indexed.

Typically used for bulk capture of documents created by another process, like a batch scan application, or a print output solution, essentially anything that can generate documents with some structured information for indexing them.

Each version of Document Manager Enterprise includes a license to use the Document Import Service.

Profiles

Any number of profiles can be configured, each of which has a priority, so that some documents can be given priority over others when there is a large volume of documents waiting to be processed.

Each profile can be configured for:

- Priority (Allows some document queues to be processed with higher priority over others)
- Target Document Manager Database (One service can write to multiple DM databases)
- Import Type (Documents or Batches)
- File paths for importing from, Problem files and Archive copies
- No.of days to retain archive copies
- API entry points for custom processing
- Image filtering to be applied
- eMail settings for failure notifications
- Batch details if 'Batch Mode' is selected.

Batches

Simple directory watching for images can be used to make batches for subsequent processing or indexing by the Document Manager Batch Scan modules. A batch scan profile can be assigned, and a default status (INDEX, PROCESS etc...). Sub folders can be used to group images into batches, suitable for many Fulti Function Copier devices that can scan to disk.

Image Processing

Some simple image processing can be done on images prior to importing into Document Manager, including PDF to TIF conversion, Colour to Mono conversion, de-speckle, smooth and sharpen.

Error Handling

Copies of all document files processed can be retained for a configurable number of days, so in the event of a need to re-process a particular file this can be done.

Should a document fail to process (invalid or missing document index etc....) an email notification can be sent to a process administrator. Corrective action can then be taken and the document re-processed.

FAQs

How quick is the Import Service?

The speed will vary depending on the resources available to it, but we would expect something around 1 document per second.

Can I run multiple instances of the Import Service?

Yes, but each must be on a separate machine, you cannot have two or more instances of the service on the same PC.

Can custom logic be applied?

Yes, there are API hooks that allow pre and post processing of the index data, to allow (for example) Database Lookups to be applied to add additional indexing information. This will require some development work by your system integrator.

System Requirements

- Document Manager Enterprise edition 2.6 or later.
- Microsoft Windows OS (2003, 2008 Server 32-bit or 64-bit) with .NET 3.5 and 1 GB RAM.
- A DM login account for the Import Service to authenticate itself as.

Index file format

The index file must contain the following key information:

- The DRAWER name, e.g. Accounts Payable
- The DOCUMENT TYPE name, e.g. Invoice
- One or more document file names (appropriate for the Document Type)
- Required Folder and Document Level indexes, e.g. Supplier Name

Example XML

```
<DOCUMENTMANAGER>
  <REQUEST>
    <ACTION>Add Document</ACTION>
    <DRAWER>ACCOUNTS PAYABLE</DRAWER>
    <DOCTYPE>AP Invoice</DOCTYPE>
    <SOURCE>
      <FILE1>Inv1911.tif</FILE1>
      <FILE2>Inv1912.tif</FILE2>
    </SOURCE>
    <FIELDS>
      <Vendor_Name>A Company Name</Vendor_Name>
      <Vendor_Number>ACN001</Vendor_Number>
      <Vendor_Location>MK7 8NL</Vendor_Location>
      <AP_Inv_Number>61529</AP_Inv_Number>
      <AP_Doc_Date>28/12/2012</AP_Doc_Date>
      <AP_Doc_Amt>460.00</AP_Doc_Amt>
      <AP_WF_Stats>Pending Approval</AP_WF_Stats>
      <SubFolder />
      <Description />
      <CostCentre>CC12</CostCentre>
      <Department>707</Department>
    </FIELDS>
  </REQUEST>
</DOCUMENTMANAGER>
```