

Kofax OmniPage Server

Folder Watcher Administrator's Guide

Version: 3.0.0

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The KOFAX logo is displayed in a bold, blue, sans-serif font. The letters are thick and closely spaced, with a consistent weight throughout the word.

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Preface

This document describes the System Configuration Editor, which is a web-based client for the Kofax OmniPage Server (OPS) folder watcher system.

The folder watcher system lets users convert their documents through simple file system operations. The folder watcher system allows users to convert their documents as easily as dropping a file from one folder to another.

OmniPage Server is a solution that supports document conversion services while optimizing scalability and reliability. OPS is an application service solution built using conventional enterprise architectural components and approaches, while still offering a high level of availability with scaling functionality.

Product documentation

The full documentation set for Kofax OmniPage Server is available online:

<https://docshield.kofax.com/Portal/Products/OmniPageServer/3.0.0-g6hc8b14r5/OmniPageServer.htm>

The Kofax OmniPage Server documentation set includes:

- *Kofax OmniPage Server Installation Guide*
- *Kofax OmniPage Server Administrator's Guide*
- *Kofax OmniPage Server API Reference Guide*
- *Kofax OmniPage Server API Sample Reference Guide*
- *Kofax OmniPage Server Folder Watcher Administrator's Guide*
- *Help for Kofax OmniPage Server Conversion Client*
- *Help for Kofax OmniPage Server Folder Watcher*
- *Kofax OmniPage Server Release Notes*
- *Kofax OmniPage Server Technical Specifications*

Prerequisites

The System Configuration Editor web application requires the following:

- Kofax OmniPage Server 3.0.0 installed, running, and accessible on the network. Refer to the *Installation Guide* for details.
- A compatible Internet browser. Refer to *Technical Specifications* for browser compatibility details.

Key concepts

The basic concept is that the Folder Watcher service can detect file changes in a specified folder and send those files to the conversion server to process. After the conversion process, the service downloads the result documents to a specified folder.

System Configuration Editor is the web-based application for configuring the watched folders and the related settings.

Folder structure

The Folder Watcher service works on a predefined folder structure. The system administrator is responsible for building a watched folder structure before the watching service starts. While the service runs, the specified system directories – such as the error folder or working directories – are managed by the system. These are created and deleted as necessary.

The conversion server runs the OCR process and downloads the result documents to a specified folder.

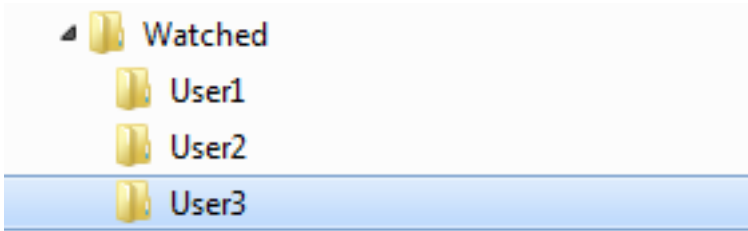
Each watched folder should have a conversion setting file containing conversion parameters related to the container folder. In the case of a missing configuration file, the server uses the conversion settings specified for the parent folder.

In the case of a root watched folder, the service will automatically generate a setting file with the default settings. Use the Folder Configuration Editor to edit folder settings.

Security

The Folder Watcher system does not contain custom security solutions. The administrator has to build the folder structure with proper authorization using the local system's privacy settings to guarantee document integrity for users.

The `Folder Watcher Service` user manages file system watching. The installation process defines this user. The administrator should give the `Folder Watcher Service` user full access to all the watched root folders and all of its subfolders. Keep in mind to set the proper rights when creating the structure of the watched folders.

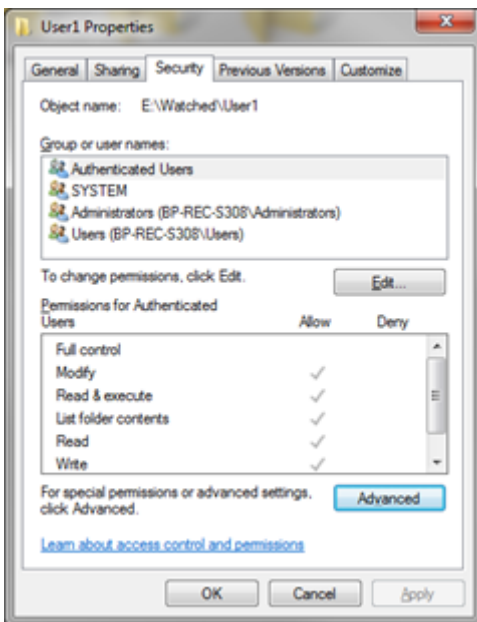


Folder structure example

Read and write permissions should be granted by the administrator.

- In a workgroup environment, all users – including the `Folder Watcher Service` user – must have read and write permissions for all root watched folders and its subfolders.
- In a domain environment, the `Folder Watcher Service` user must have read and write permissions for all root watched folder and its subfolders. The users need only read and write permissions for their associated folders.

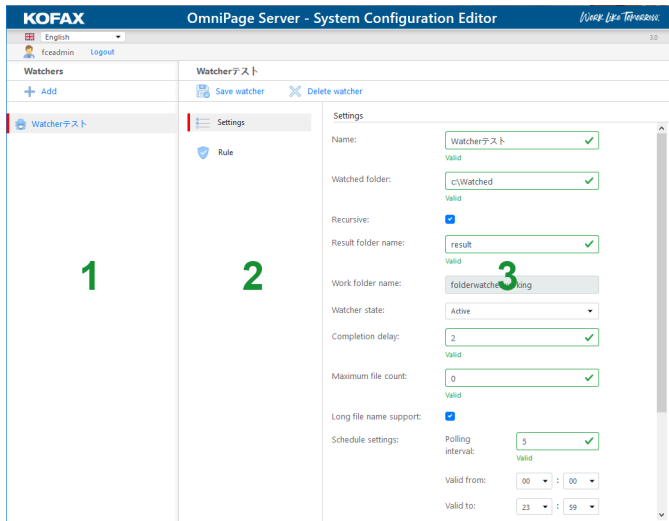
In Windows, the administrator can use the Properties dialog box of the root watched folder to manage user access.



Folder properties dialog box

User interface

As the System Configuration Editor [web application starts](#), it displays a simple user interface.



System Configuration Editor

Note Move the pointer over a setting name label to display a short description.

User interface layout

Language menu (at the top-left corner)	Select the language of the user interface.
Watchers column (marked with 1)	View the list of the available Watchers.
Assets column (marked with 2)	View the assets for the selected Watcher. The assets are arranged in groups and clicking on a group expands the content to the details pane on the right. <ul style="list-style-type: none">• Settings group: basic system settings for the Watcher, such as folder paths or time schedule.• Rule group: include or exclude filtering for the input files.
Details pane (marked with 3)	View details and specific parameters for the category selected in the Assets column.

Start System Configuration Editor

1. Start your Internet browser.
2. Type the URL of System Configuration Editor into the address bar, and press Enter.

Note Ask your system administrator for the actual URL, which follows the schema below:

```
http://{hostname}:{port}
```

For example:

```
http://omnipageserver:5006
```


Log in

Users need to log in when working with the application.

1. In the login screen, enter **User name**.
2. Enter **Password**.
3. Optionally, select **Remember me?** if you want to stay logged in.
4. Click **Log in**.

If the credentials are adequate, the application proceeds.

Log out

Users need to log out when their work with the application is over.

Click **Logout** in the menu.

The user exits the application.

Reset administrator list

If you lose control of the admin user, for example, you forget your password, you can reset the admin account by doing the following:

1. Locate the "SystemConfigurationEditor.db" file, which is placed in the folder below:

```
c:\ProgramData\Kofax\FolderWatcher\
```

2. Delete the file "SystemConfigurationEditor.db".

With the deletion of the file, the user management is set to a default state. When you [start System Configuration Editor](#) next time, it requires you to register an administrator again.

Managing Watchers

Use the System Configuration Editor web application for managing Watchers.

- [Add a new Watcher.](#)
- [Edit the settings for a Watcher.](#)
- [Edit the rules for a Watcher.](#)
- [Delete a Watcher.](#)

Add a new Watcher

1. Click **Add** under Watchers.
System Configuration Editor appends a new item to the list of Watchers. The settings of the new Watcher appear in the details pane. The **Name** parameter is filled up automatically with a valid name, such as `Watcher_XXXXXXXXXX`, where `XXXXXXXXXX` is a running number provided by the server.
2. [Edit the settings for the new Watcher.](#)
3. On the top toolbar, click **Save watcher** to keep the changes you made.

Edit Watcher settings

After you click Add or click an existing Watcher in the Watchers list, you can edit the settings for that Watcher on the right pane.

1. Optionally, edit **Name** as you prefer. A green text ("Valid") appears below the text box if the new name is not empty and not yet in use.

Tip Use a descriptive name, such as `Inbox Watcher`.

2. In the **Watched folder** box, enter the path for the folder, such as `\\server\watchfolder` or `C:\Watched`.

Note Mapped network drives are not supported, use a path for a local drive, or use a Universal Naming Convention (UNC) path.

3. Optionally, select **Recursive** to enable subfolder watching.

4. In the **Result folder name** box, enter the name of the subfolder for result files to store. The default is "result".

You can set an absolute or relative path.

- **Absolute path:** Specify a full path for the result folder, such as `C:\Result`. In this example, the output documents appear in the `Result` folder, which is placed directly in the root folder of the `C:` drive.
- **Relative path:** Omit the drive and the leading backslash from the folder name, such as "result". In this example, the output documents appear in the `result` subfolder under the relevant watched folder or subfolder.

5. In the read-only **Work folder name** box, review the subfolder for temporary files used in the conversion process. This folder is typically hidden. The default is "folderwatcherworking".
6. In the **Watcher state** list, select a folder activation status:
 - **Active** (default)
 - **Inactive**
7. In the **Completion delay** box, specify the time (in seconds) to spend waiting for the next input file of a conversion group appear in the folder. The default value is 2.
This setting has no effect if **One-by-one processing** is selected.
8. In the **Maximum file count** box, specify the limit for the number of input files in a group processing session. Set this value to 0 for no limit (default).
This setting has no effect if **One-by-one processing** is selected.
9. Under **Schedule settings**, specify the active period and polling interval for the Watcher. The default is a non-stop polling with an interval of 5 seconds.
 - a. Set **Polling interval** in seconds.
 - b. In the **Valid from** section, set the beginning of the file system polling period (Hours:Minutes). The first polling of the day starts at the time you set here.
 - c. In the **Valid to** section, set the end of the file system polling period (Hours:Minutes). The last polling of the day starts prior to the time you set here.
10. In the **Post processing mode** list, specify how to handle the original input files after the conversion processing.
 - Select **Move** to store the originals in the specified directory.
 - Select **Delete** to remove the originals.
11. In the **Post processing move to directory** box, enter the target subfolder where original files move after the conversion process completion. The default is "original".
You can set an [absolute or relative](#) path.
12. In the **Failed job move to directory** box, enter the target subfolder where original files move after the conversion failed. Also, an error file is created, which contains the exception descriptions received from the server. The default is "error".
You can set an [absolute or relative](#) path.
13. Select **One-by-one processing** to process input files one by one, as soon they appear in the folder. In this case, each input file results in a separate output file.

If **One-by-one processing** is not selected, new files convert into one single document. To set the maximum number of files converted in one document, use the **Maximum file count** setting. To set, how long the application should wait for new files after the copy of the latest file has been finished, use the **Completion delay** setting.

14. On the top toolbar, click **Save watcher** to keep the changes you made.

Important System Configuration Editor discards all changes if you fail to click Save watcher.

Edit Watcher rules

While editing the settings of a Watcher, you can edit its filtering rules.

1. Click **Rule**.

The filtering rules of the selected Watcher appear in the details pane.

2. Optionally, in the **Allowed extensions** box, you can limit the input file formats.

OPS reads input files with the specified file name extensions only. Use only compatible file format extensions, separated by semicolons.

Note Make sure the extension list is acceptable: if valid, a green text ("Valid") appears below the text box.

3. Optionally, click **Apply filtering** to enable all filtering options below.

- a. Optionally, click **Include filter enabled** to make the **Include filter** box active.

You can specify an include filter here by Windows wildcards such as "sample*.*" to include files into processing.

- b. Optionally, click **Exclude filter enabled** to make the **Exclude filter** box active.

Now you can specify an exclude filter by Windows wildcards such as "sample*.*" to exclude files from processing.

4. On the top toolbar, click **Save watcher** to keep the changes you made.

Delete a Watcher

Use this procedure to delete a Watcher. As another option, you can simply deactivate the Watcher by setting the [Watcher state](#) setting to Inactive.

1. Click the Watcher name in the **Watchers** list to select it.
2. On the top toolbar, click **Delete watcher** to remove the selected Watcher.