Importer Utility Configuration Guide

How to Configure XML Imports for ECM Systems

Audience: technical support staff, system administrators, and developers.

This guide reviews the creation and configuration of XML files for the Import Utility to ECM environments.

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Configuration Workflow

1. Create a new XML configuration.
2. Add Visual Basic scripts (if applicable).
3. Select the hot folder.
4. Select the backup folder.
5. Connect to ECM with admin credentials.
6. Select a location in ECM for import.
7. Map data from file to fields in ECM.
8. Select upload option.

Note: Complete the steps in sequential order, as some are dependent on each other.

1. Create a new XML configuration.

Run the Importer Utility as an admin. Select the **+** button on the lower left to begin a new XML configuration. Name the XML configuration within the file directory pop-up and click **Save**.

2. Add Visual Basic Scripts

This section of the importer utility allows for custom scripting that is accessible throughout the XML configuration. This can be skipped if custom scripting is not required. If needed, Visual Basic (VB) scripting is used for data manipulation, such as standardizing dates or removing unnecessary characters.

3. Selecting the Hot Folder

The Import Utility monitors a hot folder for files. A hot folder can be either a directory folder within the environment or a network share folder. Select the **+** button to navigate through the directory then select **OK**. If the folder does not exist, then select **Add new folder** in the desired location. Select the **X** button to remove a selected folder.

Specifying the filename is required. Below are examples of what is an acceptable value.

*.txt — Imports all text files using a wildcard.

Invoices_*.csv — Imports CSV files with a partially dynamic naming convention.

If there are subfolders within the chosen hot folder, select the checkmark box labeled **Traverse Subfolders.**

4. Select the Backup Folder

Much like step 3, select a directory folder or a network folder where imported files are placed after processing.

Tip: It is recommended to configure this in case of an error with the Importer Utility.

5. Connect to ECM with Admin Credentials

Within the **ServerURL** field, type in the root URL of the ECM. Then add in admin credentials within the username and password fields. Click on the **Authenticate** button to ensure connection to the ECM. This step is required for step 7 and step 8.

6. Select a Location in ECM for Import

There are two methods for selecting a location within the ECM. The first is by the name of the location- all available locations are viewable within a dropdown menu. The second is by the ID of the location- all IDs are also viewable within a dropdown menu.

7. Map Data from File to Fields in ECM

To correctly parse data from the file, specify a delimiter. Select the appropriate checkmark box or call on a VB function. If there is a header row, select the checkmark box labeled **Header Row** to skip the first line within the file.

The next portion requires mapping the column to fields within the ECM. Each column is defined by the delimiter. Click the **+** button to add a field. The field options are the fields within the location previously chosen. After selecting the desired field, specify which column in the file corresponds to the field. A value from the dropdown can be selected, or a VB function can be called from within the text field.

8. Select an Upload Option

- Option 1 imports each line of data as a new file in the ECM.
- Option 2 finds an existing file and updates it based on the specified look up field.

A new file can be created if the importer fails to find an existing file by selecting the checkmark box labeled **Create file if not matched**.

Once all the steps are completed, click **Save** at the bottom. Whenever there are files ready for import, click on the **Start** button to begin importing.