



MONITORING SERVICE CONFIGURATOR GUIDE

organise*it* MONITORING SERVICE CONFIGURATOR GUIDE

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
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

HOW TO READ THIS MANUAL

This manual uses the following conventions to describe, identify and highlight terms and operating procedures.

Keys

The keyboard keys are used in the text to describe many computer operations. Icons identify the key as they appear on the keyboard, when used in procedures. For example  identifies the [Enter] key. When keyboard keys are referred to in body text of the document, they will be identified in text, such as [Back] or [Next].

Key Operations

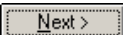


Some of the operations require you to simultaneously use two or more keys. We identify such operations by an icon of the key separated by a plus sign (+). For example,  +  indicates that you must hold down the [Ctrl] key on the keyboard and at the same time press the letter [C].

If three keys are used, hold down the first two keys and then press the third key. Be careful to only press the third key once; do not hold it down also, as this will repeat the action.

ABC When procedures require an action such as entering text, the text you are to type is represented in the type face you see to the left.

ABC When procedures require an action such as selecting an item (perhaps from a list) or ticking/un-ticking an option, then the label against such an option is represented in the type face you see on the left.

Buttons

The buttons will be shown as an image. For example the [Next] button will be indicated by . If a button has a shortcut key then the letter of the button is underlined. For example, the letter N in the [Next] button is underlined, indicating that the button can be invoked by pressing  + .

Messages

Messages are used in this manual to bring important information to your attention. Each type of message is identified as:

CAUTION: Pay attention! A caution informs you that improper use of software or failure to follow instructions may cause data loss.

NOTE: *Please read. A note is a hint or advice that helps you make best use of the software and/or it may also inform about the changes (addition or modification) that the software has carried out to the environment and may be important for proper running of the software.*

INTRODUCTION

Overview

organiseit interfaces with third-party applications using either **Pull Technology** or **Push Technology**.

In **Pull Technology**, the organiseit application queries the third-party application's databases or flat files, extracts information out of it and then imports that information into the organiseit database. The imported information is then processed for creating and/or maintaining folders and keywords for each of the entities (Clients, Underwriters etc) in the third-party application. The access to the third-party database or flat files is read-only. The flat file can be either a text file (.txt or .CSV) or a Microsoft Excel file (MS Excel 2000, 2002 and 2003). If the third-party pushes information to organiseit, instead of organiseit pulling information from the third-party application's database, then it is a Push Technology.

In **Push Technology** the third-party application will push information to the organiseit application in an XML (eXtended Markup Language) file. The XML file will be dropped into a folder on a server which is monitored by organiseit. organiseit picks up the XML file as it is dropped into the folder and processes it for creating and/or maintaining folders and keywords for each of the entities (Clients, Underwriters etc) in the third-party application.

The Push Technology is however not limited to processing of just XML files and importing information into organiseit; it can also import documents that are to be stored in the organiseit database (instead of the user dragging and dropping the document manually into a folder in organiseit). That is, the folder can be monitored for either XML files or for documents. This job is done by a component of organiseit called the **Monitoring Service**. For the service to monitor for XML files and documents, it has to be configured. This is exactly what we will see in this manual: how to configure the Monitoring Service to monitor for XML files and documents.

The organiseit Monitoring Service monitors the Windows folders and will process the files dropped into them. How the processing of files takes place is determined by the third-party application associated with the Windows folder.

Third-party applications are internally classified into two types:

- **Built-in Default Application**
- **Others** (all applications other than a Default Application)

The Windows folders associated with the built-in Default Application are known as **Data folders**. The files being dropped into the Data folders will be treated as documents and the organiseit Monitoring Service will move those documents, as is, to the organiseit Database.

The folders associated with the applications other than the Default Application will be known as **XML folders**. The files being dropped into the XML folders will be treated as XML files. The organiseit Monitoring Service will process them to reflect the required changes in the organiseit database; viz. creation of a folder for a third-party application's Customer, Vendor etc.

NOTES:

- *During installation of this module, an event log by the name **oitEventLog** is created. Any errors that the Monitoring Service encounters while monitoring either the Data folder or XML folder or processing of XML files will be written to this event log. **oitWebUser** must have sufficient rights to write to this event log.*
- *Following is the **List of Components** that are required to configure the Monitoring Service for XML files. It also includes the Owner/Provider of that component or the details of that component and the Target Audience for that component*

S. No.	Component	Owner	Target
1.	Third-party XML Schema	Third-party Application vendor	Organise IT
2.	Third-party Entity Types	Third-party Application vendor	Organise IT, End User
3.	Third-party Database List	Third-party Application vendor	End User
4.	XSL	Organise IT	End User

NOTES:

- *only the built-in user **admin** can use this module*
- *the organiseit Monitoring Service runs in the process space of user **oitWebUser***
- ***oitWebUser** must have full control over the Windows folder that is being monitored by the Monitoring Service*
- *0 Kb files will not be processed*
- *the files dropped into the folder(s) that are being monitored must not have a read-only attribute*
- *users must not utilize the monitored Windows folders as Working folders (e.g. save a Word file into the folder that is being monitored and keep working on that document. Some applications create temporary files before converting them into a final file - such temporary files must not be created in this folder. Certain scanners allow you to scan to a folder on your PC; do not select the folder that is being monitored, as a folder to which you want to scan, as the scanner will create temporary files before giving you a scanned image of the document.)*
- *if the documents become accumulated in the Data folder or XML folder, stop and restart the organiseit Monitoring Service*
- *use Local Drive Paths instead of UNC paths or mapped drives. If they are used at all, restart the Monitoring Service whenever there is a network failure*

Brief steps required for configuring**Steps for Data Folder Monitoring**

These steps are used for pushing documents to organiseit:

1 Login**2** Select the Default Application

NOTE: *stop the organiseit Monitoring Service before starting to configure and then Start the service after configuration is completed*

3 Select an Existing, or Create a New, entry for the Data folder to be configured**4** Configure the Data folder

NOTE: *the Data folder is the Windows folder that will be monitored and is a place where the documents will be dropped*

- a. Select the Windows folder to be monitored
- b. Select the organiseit Company where the documents will be moved
- c. Select the organiseit User who will be accountable for the documents moved to organiseit
- d. Select the organiseit Folder where the documents will be stored

Steps for XML Folder Monitoring:

These steps are used for interfacing the third-party application with organiseit:

- 1 Login
- 2 Configure the third-party application including its Entity Types and Databases

NOTE: stop the organiseit Monitoring Service before starting to configure and then Start the service after configuration is completed

- 3 Configure the XML folder and Push

NOTE: the XML folder is the Windows folder that will be monitored and is a place where the XML files will be dropped

- a. Configure the XML folder
 - i. Associate the Windows folder to a third-party application, where the XML files will be dropped by that third-party application
 - ii. Specify the organiseit Company that will be affected by the XML files dropped in the Windows folder
- b. Configure the Push mappings related to the XML folder
 - i. Select the third-party Entity Type for which the Push is being configured
 - ii. Select the organiseit Company that will be affected by the dropped XML files and associate the third-party database (source) if required
 - iii. Select the organiseit Folder that will work as a repository

NOTE: this folder will have Classifying folders with single character names; viz. A, B, C, 0, 1, 2, etc. The folder representing the third-party Entity will be created under this Classifying folder, depending on the first character of its name. If the Classifying folder does not exist, prior to the creation of the folder representing the third-party Entity, the required Classifying folder will be created
 - iv. Select a template structure from the organiseit database, if it is to be included while creating a folder for each instance of the entity (i.e. for each Customer, Supplier etc.)

CHAPTER 1:

CONFIGURING THE MONITORING SERVICE FOR DATA FOLDERS

The following chapter examines the configuration used for pushing documents to organise*it* in an XML file. This will cover:

- logging in
- selecting the default application
- selecting a data folder to be configured
- configuring the data folder

1.1 LOGGING IN

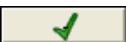
Logging in to the *organiseit Monitoring Module Configurator* is the first step in enabling you to access the functionality. To log in to the Configurator, you will need a valid user name and password.

- 1 Locate and double-click on the *organiseit Monitoring Module Configurator* icon

You will now see the Login screen. The built-in organiseit user admin is the only valid user to execute this application...




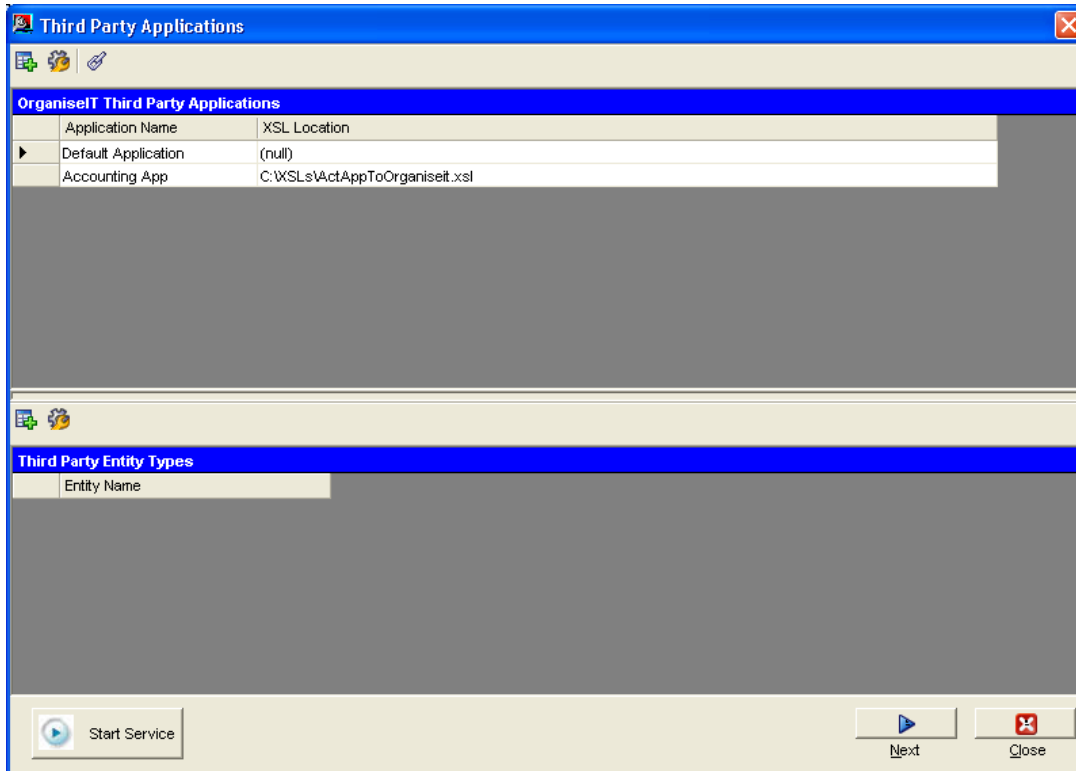
The screenshot shows a login window for the 'organiseit Monitoring Module Configurator'. The window title is 'organiseit Monitoring Module Configurator'. The main text reads 'Welcome to the new experience of Document Management'. There are two input fields: 'User ID:' with the value 'admin' and 'Password:' with the value '*****'. Below the fields are two buttons: 'Ok' (with a green checkmark icon) and 'Close' (with a red 'X' icon). In the top right corner, there is a 'Login' button with a key icon. In the bottom left corner, it says 'Version 1.0.0'.

- 2 Ensure that *User ID* displays *admin*, then press **Tab** to move to the *Password* field
- 3 Type in a valid password and click on *Ok*  to continue

On successful validation of the User ID and Password, the Third Party Applications Browser window is displayed, requiring you to select the default application.

1.2 SELECTING THE DEFAULT APPLICATION


NOTE: If the *organiseit* Monitoring Service is already running, ensure that you stop it before proceeding with configuration and then restart it after you have completed - even the smallest change made during configuration will only come into effect after the service is restarted. You can start and stop the service by clicking on **Stop / Start Service** , in the bottom left corner of the window.



1 Click on **Default Application** listed under **Application Name** in **OrganiseIT Third Party Applications**, to select it

2 Click on **Next**  to continue configuration

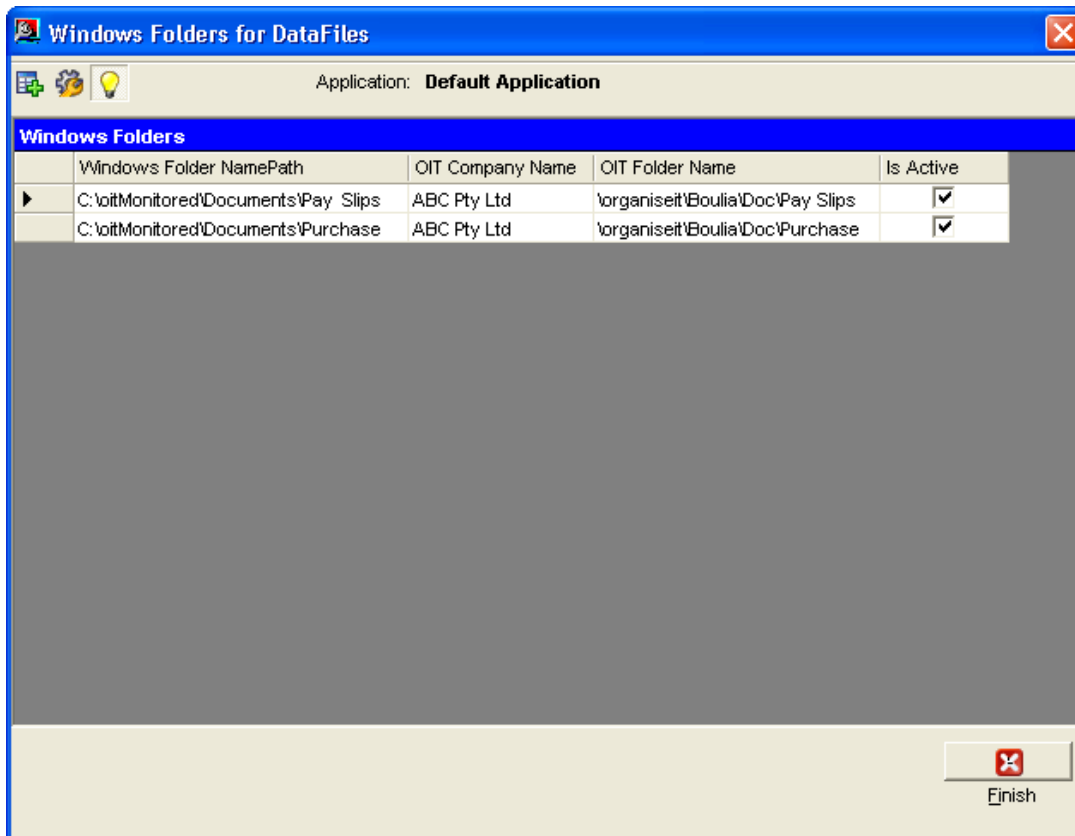
OR

Click on **Close**  to abort the changes and exit the application


The Data-Folder Browser window is displayed (if you clicked on Next), requiring you to select or create the Data-Folder to be configured.


1.3 SELECTING OR CREATING THE DATA FOLDER

The Data folder is the Windows folder that will be monitored and is the place where the documents will be dropped.



The **Data Folder Browser** window presents you with a list of existing Data folders, from which you can select. Alternatively, you can create a new folder...

NOTE: You can click on  to switch between showing all records or only the active records

- 1 Click on  in the toolbar at the top of the window to create a new Data folder

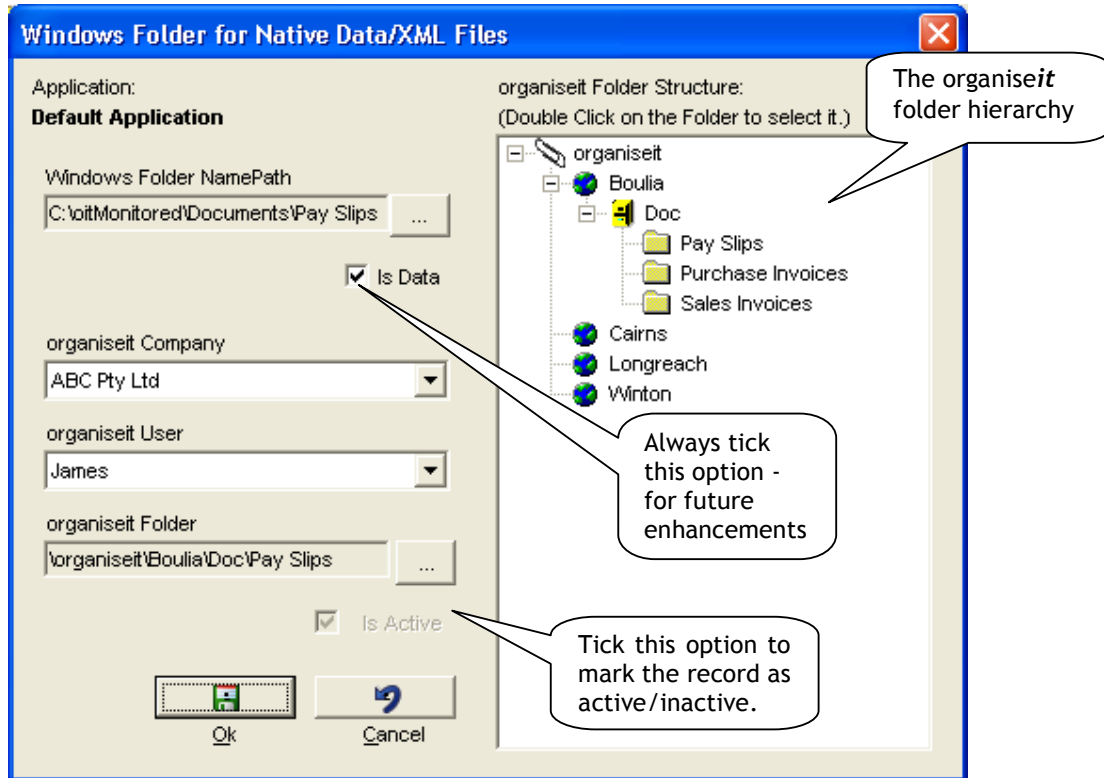
OR

Click on an existing folder in the **Windows Folders** list and click on  to modify its parameters

The **Data Folder Configurator** window is now displayed, requiring you to configure the Data-Folder.

1.4 CONFIGURING THE DATA FOLDER

The Data folder selected will be the one monitored by the organiseit Monitoring Service.



1.4.1 Selecting a Windows Folder to be Monitored

First you need to select a Windows folder to be monitored - this represents the folder that will be configured as the Data folder and will be monitored by the organiseit Monitoring Service...

- 1 Type in the entire folder path (including the folder name) in **Windows Folder NamePath**

OR

Click on and browse through the folder list to locate and select it

NOTES:

- Organise IT advises that Network or UNC paths should be avoided, as the Service will stop responding and must be restarted in case of Network failures or errors
- **oitWebUser** must have Full Access permissions on this Windows folder. If **oitWebUser** does not have full permissions, then the system will return an error when documents are dropped into this folder. All error logs will be written to the event log **oitEventLog** on the machine on which this Service is running

1.4.2 Selecting an organiseit Company

You now need to select the organiseit Company to where the documents will be moved...

- 2 Click on the drop arrow  for **organiseit Company** and select an option from the list

This represents the organiseit Database. Documents dropped into the Data-Folder will move to this organiseit Database.

1.4.3 Selecting an organiseit User

You now need to select the organiseit User accountable for the documents moved to organiseit...

- 3 Click on the drop arrow  for **organiseit User** and select an option from the list


All the documents moved to the organiseit Database will be accounted to this user i.e. the Audit entries in organiseit will show this user as the creator of the document.

1.4.4 Selecting an organiseit Folder

You now need to select the organiseit Folder where the documents will be stored (i.e. documents dropped into the Data folder will move to this organiseit folder)...

- 4 Type in the full path and name of the folder in **organiseit Folder**

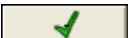
OR

Click on  and browse through the folder list to locate and select it


OR

Double-click on the folder in the **Folder Hierarchy** displayed at the right of the screen

NOTE: The selected organiseit User must continue to hold Add permissions on this organiseit folder. If at any time the Add permission on this folder is revoked from that User, then the system will return an error. All such error logs will be written to the event log **oitEventLog** on the machine on which this service is running

- 5 Click on **Ok**  to save the changes and return to the **Data Folder Browser** window

OR

Click on **Cancel**  to abort the changes and return to the **Data Folder Browser** screen

Remember, you must restart the Service after making modifications for the new settings to come into effect.

If at any time you would like to stop monitoring a Windows folder, then select the appropriate mapping and click on **Is Active** until it does not appear with a tick, making the mapping inactive. When the service is restarted, it will not monitor the inactive Windows folder. To restart monitoring of an inactive mapping, simply click on **Is Active** until it appears with a tick and restart the Monitoring Service.

CAUTION: a single Windows folder must not be specified to be monitored twice (i.e. no two active mappings should specify the same Windows folder - the system will not be able to validate such duplicate mappings and will lead to an abnormal behaviour of the organiseit Monitoring Service)

CHAPTER 2:

CONFIGURING THE MONITORING SERVICE FOR XML FOLDERS

The following chapter examines the configuration used for interfacing third-party applications with *organiseit*. This will cover:

- logging in
- configuring the third-party application
- configuring the XML Folder and Push mappings

2.1 OVERVIEW - MONITORING XML-FOLDERS

The following chapter examines the configuration used for interfacing third-party applications with *organiseit*. Let us first look at an example and two possible scenarios as solutions.

2.1.1 Case Study

Consider a third-party application called *Accounting App* which is a multi-database application. It has three databases named:

- *Victoria*
- *Queensland*
- *South Australia*

The *organiseit* application also has three databases named:

- *VIC*
- *QLD*
- *SA*

Accounting App and the *organiseit* application must be interfaced in such a way that any changes made in *Victoria* must be reflected in *VIC*, changes made in *Queensland* must be reflected in *QLD* and changes made in *South Australia* must be reflected in *SA*.

2.1.1.1 Scenario 1

The third-party application can designate a Windows folder per database in which it will drop the XML files of that database (i.e. each database maintains a separate Windows folder).

Thus *Accounting App* designates Windows folder:

- *C:\oitMonitored\Victoria* for the *Victoria* database
- *C:\oitMonitored\Queensland* for the *Queensland* database; and
- *C:\oitMonitored\South Australia* for the *South Australia* databases

The *organiseit* Monitoring Service is then configured so that the *organiseit* companies *VIC*, *QLD* and *SA* are associated with the Windows folders:

- *C:\oitMonitored\Victoria*
- *C:\oitMonitored\Queensland*; and
- *C:\oitMonitored\South Australia* respectively.

As a result of this, the changes made in *Victoria* will be reflected in *VIC*, the changes made in *Queensland* will be reflected in *QLD* and the changes made in *South Australia* will be reflected in *SA*.

2.1.1.2 Scenario 2

The third-party Application can designate only one Windows folder in which it will drop the XML files, irrespective of the database to which it belongs.

As opposed to the above, *Accounting App* can designate only one Windows folder called *C:\oitMonitored\All* and drop all the transaction XML files of all three databases in it.

The first prerequisite to allow this, is that the third-party application *Accounting App* should provide the name of the database associated with the XML file in the XML file itself (i.e. if the XML file is of the *Victoria* database then that XML file should have a tag for *Database Name* and the name of the database must appear within this tag). In this case, the *organiseit* application must also have the name of the third-party application's databases so that it can map the third-party database with the *organiseit* Company, so as to synchronize the changes as per the aforesaid requirement.

2.2 LOGGING IN

Logging in to the *organiseit Monitoring Module Configurator* is the first step in enabling you to access the functionality. To log in to the Configurator, you will need a valid user name and password.

- 1 Locate and double-click on the *organiseit Monitoring Module Configurator* icon

You will now see the Login screen. The built-in organiseit user admin is the only valid user to execute this application...



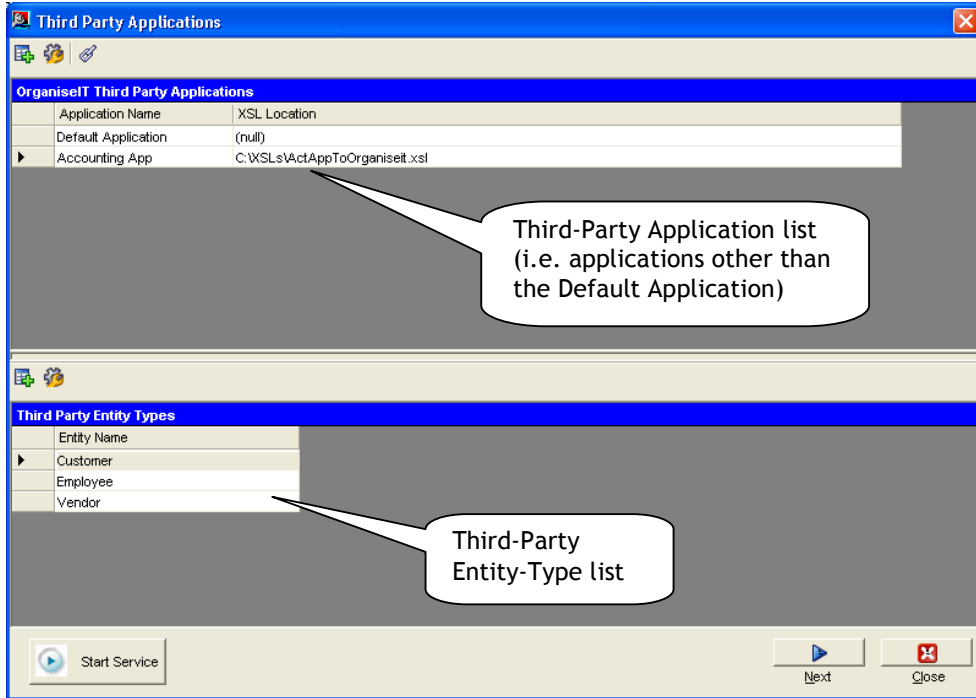
The screenshot shows a login window for the 'organiseit Monitoring Module Configurator'. At the top right, there is a 'Login' button with a key icon. The main area contains the 'organiseit' logo (a paperclip icon followed by the text 'organiseit') and the text 'Monitoring Module Configurator' and 'Welcome to the new experience of Document Management'. Below this, there are two input fields: 'User ID:' with the text 'admin' and 'Password:' with '*****'. At the bottom, there are two buttons: 'Ok' with a green checkmark icon and 'Close' with a red 'X' icon. The version 'Version 1.0.0' is displayed in the bottom left corner.

- 2 Ensure the *User ID* displays *admin*, then press to move to the *Password* field
- 3 Type in a valid password and click on *Ok* to continue

On successful validation of the User ID and Password, the Third-Party Applications Browser window is displayed, requiring you to select the Third Party application.







2.3 CONFIGURING THE THIRD-PARTY APPLICATION

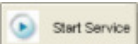
This process includes configuring the Entity Types and Databases.




The *Third Party Applications Browser* window is composed of two parts: the top pane enables you to add and configure Third-Party Applications and the bottom pane enables you to add and configure Third-Party Entity Types.


The following table describes the buttons and tools displayed in this window:

Top pane	
	Add Third Party Application
	Modify Third Party Application
	Add Third Party Database
Bottom pane	
	Add Third Party Entity Type
	Modify Third Party Entity Type
Other	
	Toggle button enabling you to start and stop the organiseit Monitoring Service

NOTE: If the organiseit Monitoring Service is already running, ensure that you stop it before proceeding with configuration and then restart it after you are completed - even the smallest change made during configuration will only come into effect after the service is restarted. You can start and stop the service by clicking on the Stop / Start Service  , in the bottom left corner of the window

2.3.1 Adding a Third Party Application

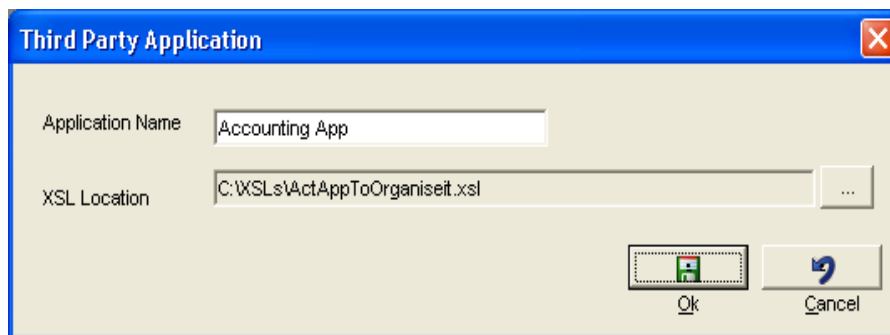
1 Click on **Add Third Party Application**  (in the top pane) to create a new third-party application
OR

Click on an existing third-party application in the **OrganiseIT Third Party Applications** list and click on **Modify Third Party Application**  (in the top pane) to modify its parameters


The **Third Party Application** window is now displayed, requiring you to **identify the Third Party Application and XSL File...**

NOTES:

- The XSL file is the miniature program that will convert the XML provided by the third-party application to an XML format that organiseit will recognise and understand
- The XSL file will be provided by Organise IT. There will be an XSL file for each third-party application that interfaces with organiseit. Ask for the appropriate XSL file from Organise IT
- Organise IT advises that Network or UNC paths be avoided as the Service will stop responding and must be restarted in case of network failures or errors
- **oitWebUser** must have Full Access permissions on this folder where the XSL file is stored. If **oitWebUser** does not have full permissions on this folder then the system will return an error when trying to process the XML files dropped by the third-party application. All error logs will be written to the event log **oitEventLog** on the machine on which the Service is running



2 Type in the complete third-party application name in **Application Name**


3 Press  to move to the **XSL Location** field

4 Type in the file name of the XSL file, including the full path


OR

Click on  and browse the folder list to locate and select the file

NOTE: Organise IT advises that Network or UNC paths be avoided as the Service will stop responding and must be restarted in case of network failures or errors

5 Click on **Ok**  to save the changes and return to the *Third Party Applications* window

OR

Click on **Cancel**  to abort the changes and return to the *Third Party Applications* window

2.3.1.1 Adding and Configuring an Entity Type


You now need to add and configure the Entity Types related to the selected Application.

Third party Entity Types are the Entities existing in the third-party application e.g. Customer, Employee, Vendor, Contractor, Service-Provider etc. Whenever these entities are either Created, Modified or Deleted, information about the same will be passed to organiseit through the XML files.

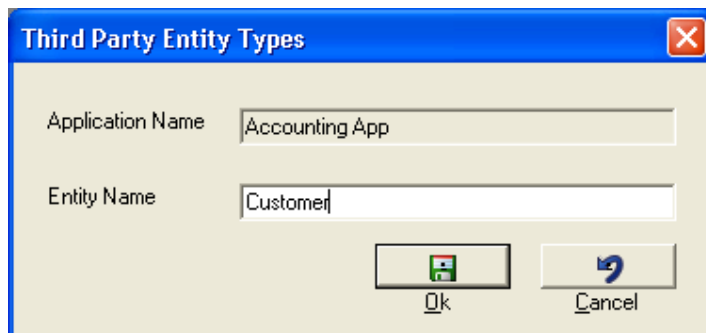
It is not necessary that all of the entities will be considered by organiseit. Get the list of entities from the Third-Party Application Vendor whose details will be passed in the XML file. Additionally, you need to find out from Organise IT as to which entities are being considered and then add those.

6 Click on **Add Third Party Entity**  (in the bottom pane) to add a new entity

OR

Click on an existing entity in the *Third Party Entity Types* list and click on **Modify Third Party Entity**  (in the bottom pane) to modify its parameters

The *Third Party Entity Types* window is now displayed...

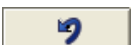


7 Type the new entity name in *Entity Name*

The Entity Name must be unique (in this list). The field is modifiable and can be altered at any time...

8 Click on **Ok**  to save the changes and return to the *Third Party Applications* window

OR


Click on **Cancel**  to abort the changes and return to the *Third Party Applications* window

CAUTION: The value of *Entity Name* should be entered as specified by the Third-Party Application Vendor (i.e. they must be entered as they appear in the XML file). If the value of the *Entity Name* does not match with that in the XML file, then the XML files will not be processed correctly

2.3.1.2 Adding and Configuring Third Party Databases

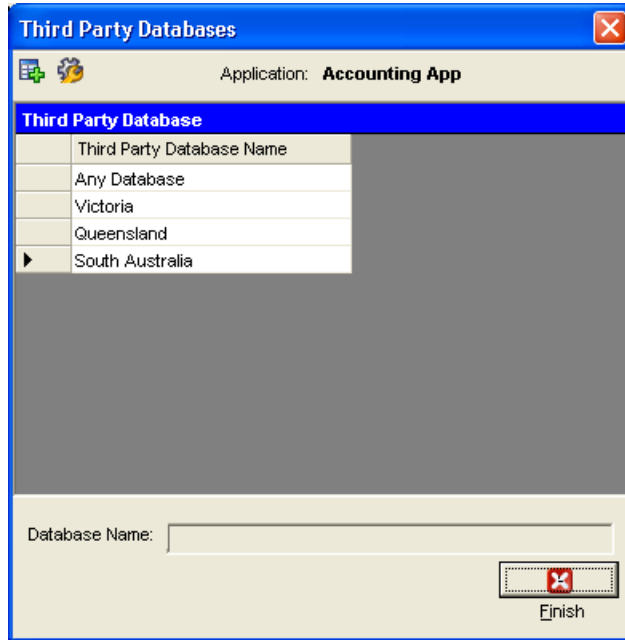
You are now required to configure the databases related to the selected Third Party Application...

NOTE: This step is mandatory if the situation is the same as that described in Scenario 2 (page 11) - i.e. the third party application can designate only one folder in which it will drop the XML files, even though the number of databases it maintains is more than one

- 9 Click on **Add Third Party Database**  (in the top pane) to display the **Third Party Databases** dialog box


The current third party databases are listed in this dialog box...

NOTE: Notice the entry **Any Database**. This entry must be left as it is




- 10 Click on **Add Database**  to add another database


OR

Click on an existing **Third Party Database** in the list and click on **Modify Database**  to change the name

- 11 Type in a unique name in **Database Name**

CAUTION: The value for **Database Name** should be entered as specified by the Third Party Application Vendor (i.e. the value must be the same as that which appears in the XML file). If the value for **Database Name** does not match with that in the XML file, then the XML files will not be processed properly

- 12 Click on **Finish**  to complete the process and return to the **Third Party Applications Browser** window

- 13 Click on the **Third Party Application** in the list and click on **Next**  to continue configuration

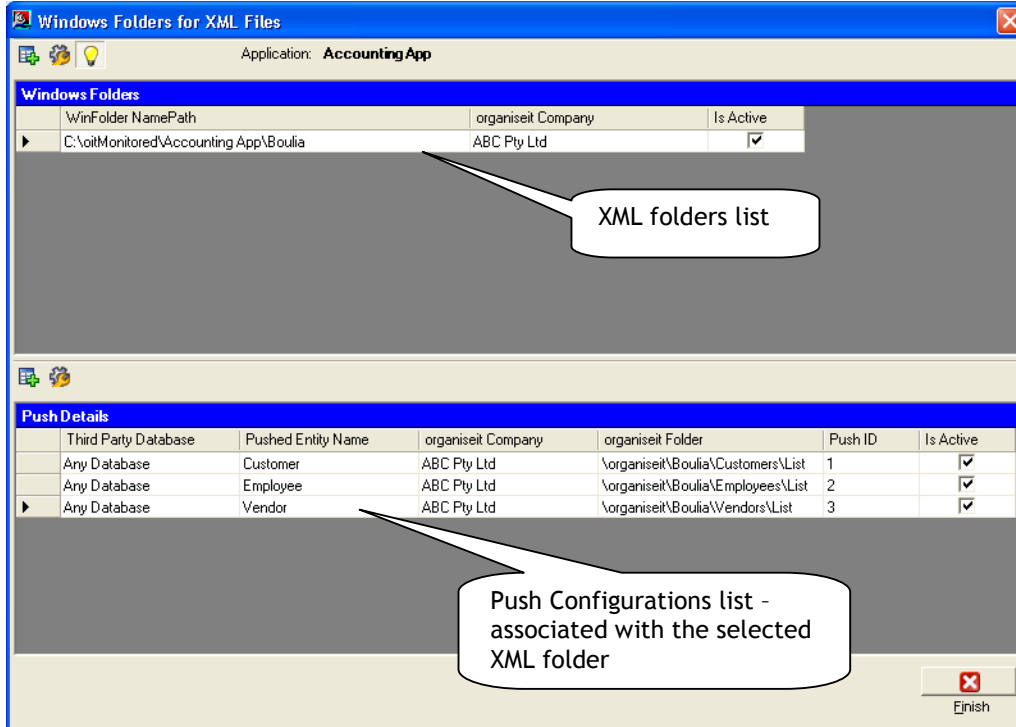
The **XML Folder Browser** window is now displayed, requiring you to configure the XML folder and Push mappings...

- 14 Click on **Close**  to exit the application

2.4 CONFIGURING THE XML FOLDER AND PUSH






The XML folder is the Windows folder that will be monitored by the organiseit Monitoring Service for the XML files that will be dropped by the third party application.

2.4.1 The XML Folder Browser Window



The XML Folder Browser window is composed of two parts: the top pane enables you to add and configure the XML Folders list and the bottom pane enables you to add and configure Push details for the selected folder.


The following table describes the buttons and tools displayed in this window:

Top pane	
	Add XML Folder
	Modify Selected XML Folder
	Switch between viewing <i>only the active records</i> or <i>all records</i>
Bottom pane	
	Add Push Configuration
	Modify Push Configuration

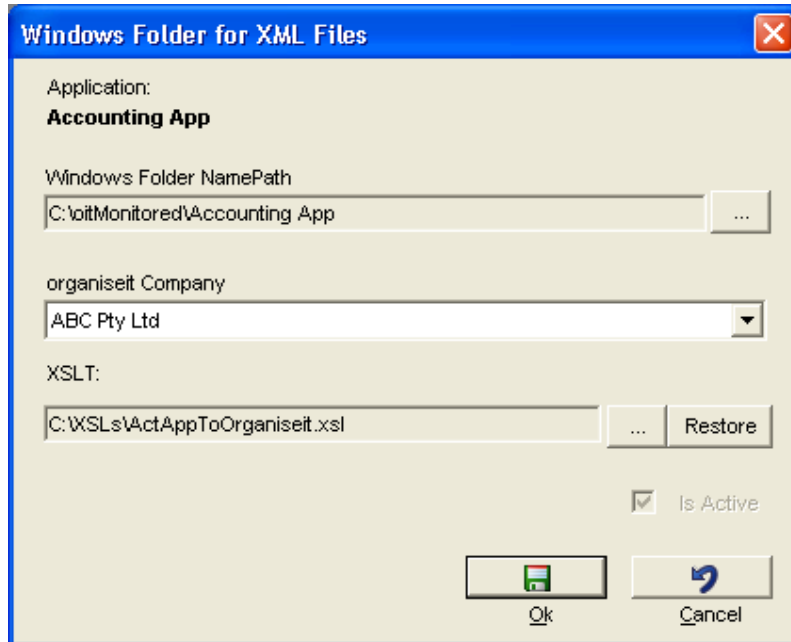
2.4.2 Configuring an XML Folder

- 1 Click on **Create New XML Folder**  to create a new folder

OR

Click on an existing folder in the **Windows Folders** list and click on **Modify XML Folder**  to change its parameters

The **XML Folder Configurator** dialog box is now displayed...




2.4.2.1 Associating a Windows Folder

First you need to associate a Windows folder with the third party application. This is the folder into which the third party application will be dropping the XML file and will be monitored by the organiseit Monitoring Service. This folder is known as the XML folder...

- 2 Click in **Windows Folder NamePath** and type in the folder name and complete path

OR

Click on  and browse through the folder list to locate and select it

NOTES:


- Organise IT advises that Network or UNC paths be avoided as the Service will stop responding and must be restarted in case of network failures or errors
- **oitWebUser** must have Full Access permissions on this Windows folder. If **oitWebUser** does not have full permissions on this folder, then the system will return an error when documents are dropped into this folder. All error logs will be written to the event log **oitEventLog** on the machine on which the Service is running

2.4.2.2 Specifying the organiseit Company

You now need to specify the organiseit Company. This represents the organiseit database into which the information from the XMLs will be imported. In the case of a situation such as Scenario 2 (see page 11), select the value **Company from XML...**


- 3 Click on the drop arrow  for **organiseit Company** and select an option from the list

2.4.2.3 Specifying the XSL Path

You can now specify the path of the XSL - a default value is already entered, but can be replaced. If you have changed the value and wish to restore the default, click on  ...

- 4 Click in **XSLT** and type a new value


OR

Click on  and browse through the folder list to locate and select it

NOTE: Organise IT advises that Network or UNC paths be avoided as the Service will stop responding and must be restarted in case of network failures or errors

2.4.2.4 Changing the Is Active Flag

This is a flag to set the mappings to active or inactive. It is active by default. If you want to stop monitoring of the Windows folder targeted in the mapping, you will need to click on the option until it does not display a tick...

- 5 Click on **Is Active** to place or remove the tick
- 6 Click on **Ok**  to save the changes and return to the **XML Folder Browser** window

OR

Click on **Cancel**  to abort the changes and return to the **XML Folder Browser** window

You must restart the service for the changes to come into effect...

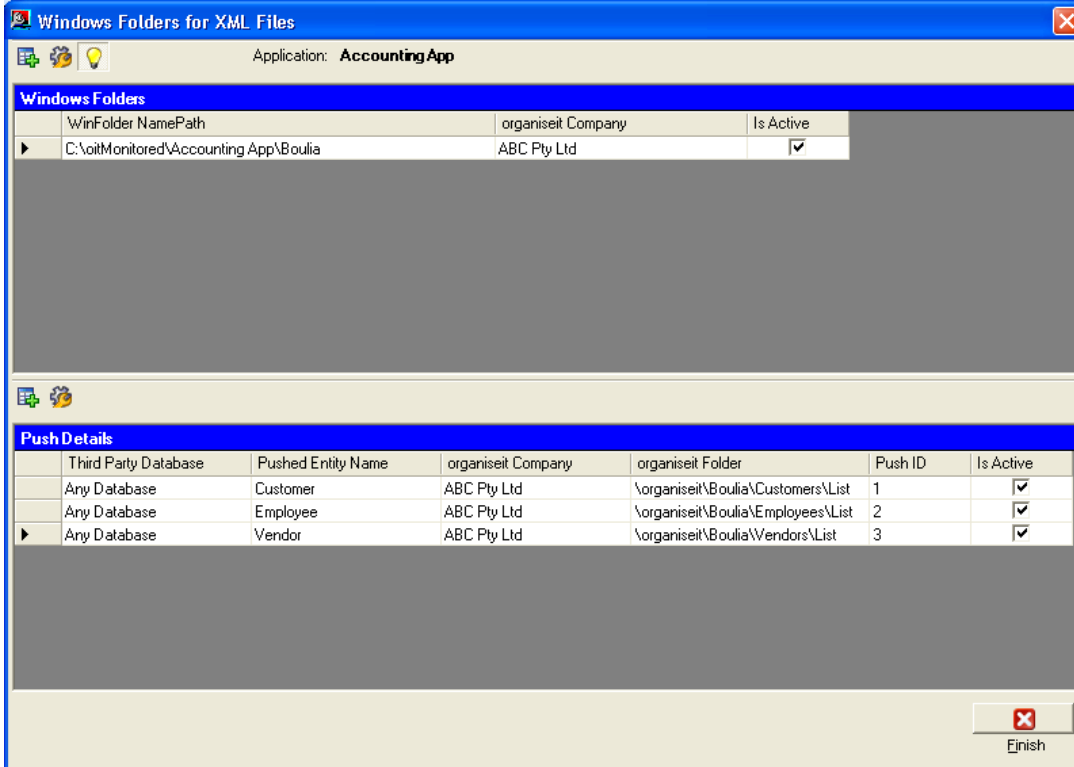
NOTES:

- A single Windows folder cannot be specified to be monitored twice (i.e. no two active mappings should specify same Windows-folder). For more information, refer to “Selecting a Windows Folder to be Monitored”, page 8 and “Configuring an XML Folder”, page 18)
- The Audit entries for actions carried out in organiseit (i.e. Creation or Modification of Folders, Keywords etc), while processing the XML files dropped by the third-party applications, will be in the name of **admin**

CAUTION: a single Windows folder must not be specified to be monitored twice (i.e. no two active mappings should specify same Windows folder. The system will not be able to validate such duplicate mappings and will lead to an abnormal behaviour of the organiseit Monitoring Service.)

2.4.3 Configuring the Push Mappings

This section looks at how to configure the Push mappings related to the selected XML folder




- 1 Click on the folder in the **Windows Folders** list (in the top pane) to select it

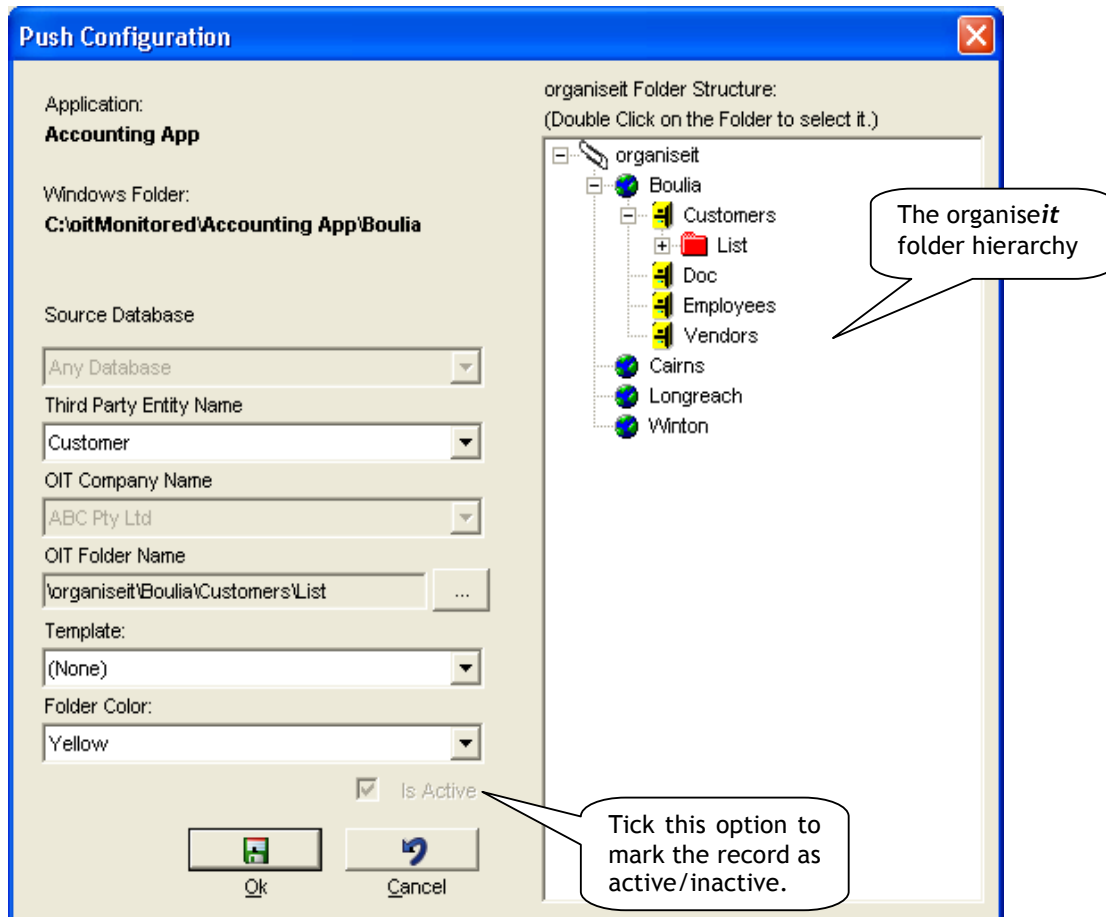
This is the folder whose push needs to be configured. The bottom grid will list the Push Configurations for the selected XML folder...

- 2 Click on **Add Push Configuration**  to create a new Push Configuration

OR

Click on **Modify Push Configuration**  to modify the parameters of the existing Push Configuration


The Push Configuration window will now be displayed...



2.4.3.1 Selecting the Source Database

The Source Database is the name of the third party application database. If the situation is as described in Scenario 1 (page 11), then this list will be disabled as it is not applicable in this case. In the case of Scenario 1, there is a distinct Windows folder for each database of the third party application and hence mapping that folder to the organiseit database implicitly has mapped that database of the third party application to the organiseit database.

If the situation is as mentioned in Scenario 2 (page 11) then this list will be enabled and will list the names of the databases of the third-party application that has been typed in earlier. In this case...

- 3 Click on the drop arrow  for **Source Database** and select the appropriate database from the list

2.4.3.2 Selecting the Third Party Entity Type

- 4 Click on the drop arrow  for **Third Party Entity Name** and select an option from the list

This list will display all of the entity names typed in earlier (for more information, refer to “Adding and Configuring an Entity Type”, page 15). The push will be configured for the selected Entity Type...

2.4.3.3 Selecting the organiseit Company

This is the name of the organiseit database. If the situation is as mentioned in Scenario 1 (page 11) then this list will be disabled and the organiseit database selected in earlier steps will appear as selected. In case of Scenario 1 (page 11) there is a distinct Windows folder for each database of the third party application and hence mapping that folder to the organiseit database implicitly has mapped that database of the third-party application to the organiseit database.

If the situation is as mentioned in Scenario 2 (page 11) then this list will be enabled and will list the names of the organiseit databases. In this case...


- 5 Click on the drop arrow  for **OIT Company Name** and select an option from the list

2.4.3.4 Selecting the organiseit Folder

This is the organiseit folder, from the selected organiseit database, that will work as a repository folder for storing the third-party Entity details for the selected Entity Type.

- 6 Type the name and full path for the folder in **OIT Folder Name**

OR

Click on  and browse through the folder list to locate and select it

OR

Locate and double-click on the folder in the **Folder Hierarchy** shown in the right-hand pane

This organiseit folder will contain Classifying folders with single character names; viz. A, B, C, 0, 1, 2 etc. The folder representing the third-party Entity will be created under this Classifying folder, depending on the first character of its name. If the Classifying folder does-not exist, prior to creation of the folder representing the third-party Entity, the required Classifying folder will be created.

2.4.3.5 Selecting the organiseit Folder Template

This is the template that will be used while creating a folder for each instance of an Entity Type (e.g. for each Customer Folder, create a folder structure similar to the selected Template). This is not mandatory. If selected, the template will be copied during creation of the folders, while processing of the XML files occurs.

- 7 Click on the drop arrow  for **Template** and select an option from the list

2.4.3.6 Selecting Folder Colour


Specifies the colour of the folder to be used during the creation of folders, while the XML files are being processed. The default colour is yellow.

- 8 Click on the drop arrow  for **Folder Colour** and select an option from the list


2.4.3.7 Changing the Is Active Flag

The value is True (ticked) by default. This option activates/deactivates folder mappings.

9 Click on **Is Active** to place or remove the tick

10 Click on **Ok**  to save the changes and return to the **XML Folder Browser** window

OR

Click on **Cancel**  to abort the changes and return to the **XML Folder Browser** window

*NOTE: Template, Folder Colour and the Is Active flag are the only fields that can be modified.
Restart the Service for the new settings to come into effect...*

11 Click on **Finish**  to close the application.