

# Concord Folder Monitor

## Quick Start Guide



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# Preface

Welcome to Concord Folder Monitor: a Windows utility that supports intake and return processes with Concord NEXTSTEP. The intake process monitors folders for new documents to be uploaded to the appropriate NEXTSTEP queues. The return process monitors NEXTSTEP queues for documents that are flagged for download to the local file system.

There are several use cases for Folder Monitor, including:

- Users can install on their personal machines as an easy way to drag and drop documents into a folder and have those documents automatically appear in NEXTSTEP
- Network admins can install on a server to provide the same functionality to a larger group, using a single installation of the tool. They would do this by providing shared access to the monitored folders.
- Applications can be integrated with NEXTSTEP in the same way: configure the applications to drop files into the monitored folder locations to submit items to NEXTSTEP automatically; or configure applications to pick up files in retrieval directories if they need to process documents released by NEXTSTEP.

## Who this Guide is for

The Concord Folder Monitor Quick Start Guide provides helpful information for any administrator tasked with the installation and/or the configuration of service utility applications.

# Getting Started

This chapter provides information required to get started with the Folder Monitor application. The following topics are included:

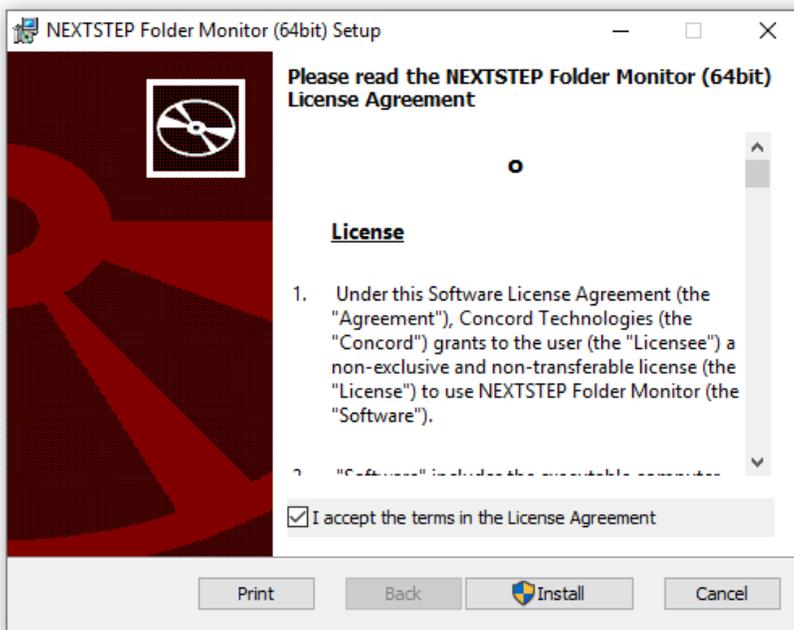
- ✦ System Requirements
- ✦ Installation Procedure
- ✦ Getting Familiar with the Interface

## System Requirements

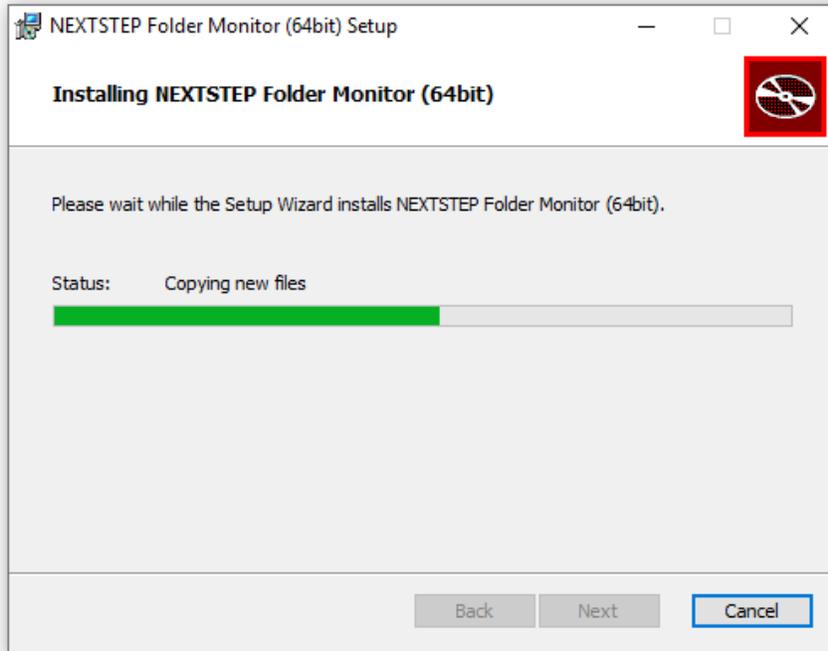
- ✦ To use Concord Folder Monitor, you must have a Concord NEXTSTEP account.
- ✦ Supported operating systems: Windows 10, Windows 2012, Windows 2016
- ✦ Concord Folder Monitor requires at least 64 megabytes(MB) of RAM (128MB is recommended).
- ✦ Concord Folder Monitor requires at least 50 megabytes(MB) of available space on the hard disk (more may be required based on the level of traffic to handle).
- ✦ Higher levels of RAM and storage may be required if the volume of files being processed is high
- ✦ Scaling resources would be treated exactly as any network file server, as the utility mimics similar behaviors, and so uses similar resources:
  - ❑ Folder and file enumeration
  - ❑ Network transfer of files, both from users when using a monitored network share and to/from the NEXTSTEP platform
  - ❑ Web service calls to the NEXTSTEP platform

## Installation Procedure

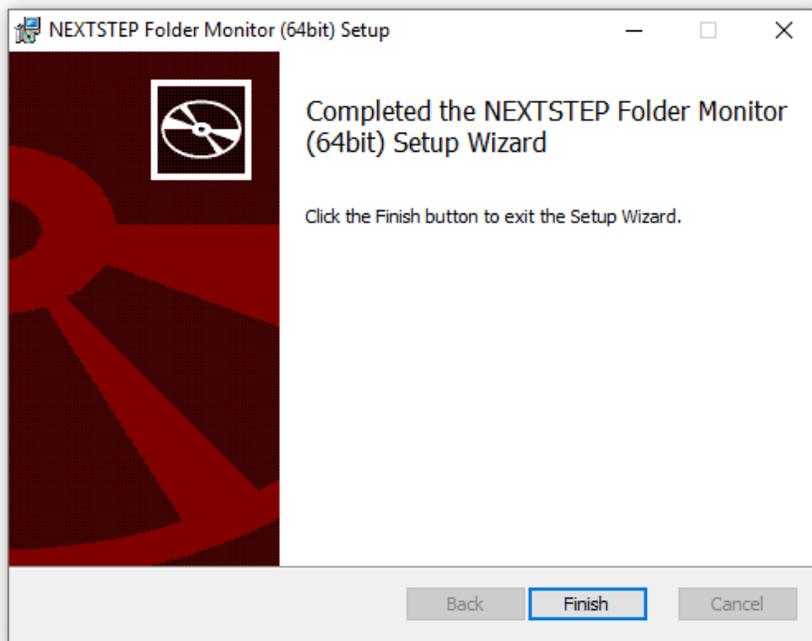
- Download the Folder Monitor Installer
- Disable any anti-virus software before installing Folder Monitor
- Run the install setup by double clicking the [FolderMonitor.msi](#) file
- Accept the License Agreement and click [Install](#) to initiate the install.



- A progress bar will display your installation progress



- ➔ Once finished, you will get a successful installation notification, click [Finish](#) to exit the installer



## Windows Service Security Settings (optional)

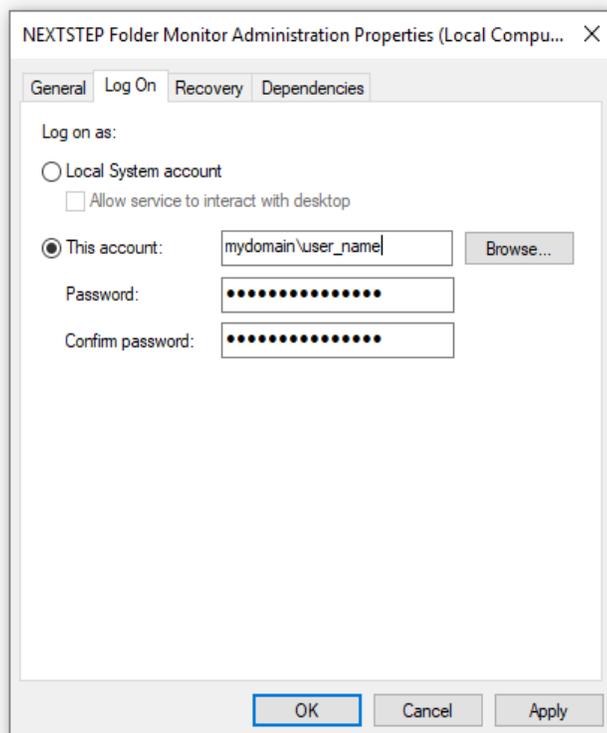
If using Folder Monitor to upload or download faxes from network folders, the application will need Windows permissions to access those locations. You must set the permissions for the Windows services using an account that has access to the locations.

To set permission go to **Start > Control Panel > Administrative Tools** and open **Services**. Find the Concord Folder Monitor services as shown below.

 NEXTSTEP Folder Monitor Administration	The administrative service for the NEXTSTEP Folder Monitor.	Running	Automatic	Local System
 NEXTSTEP Folder Monitor Processing	The processing service for the NEXTSTEP Folder Monitor.	Running	Automatic	Local System

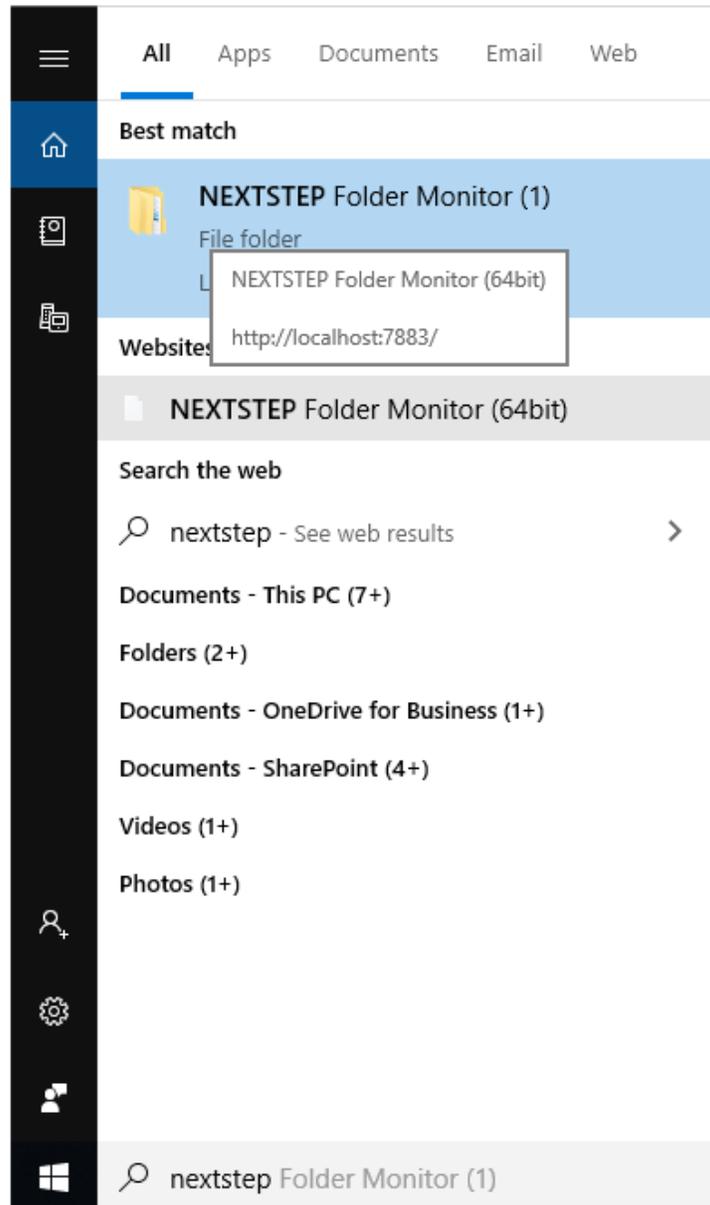
Right click on the service and select **Properties**. Click on the **Log On** tab and change the "Log on as" to "This account" and type in the windows account that is required to access the remote resources.

Note: This is only required if the remote resource requires Windows permissions to access.



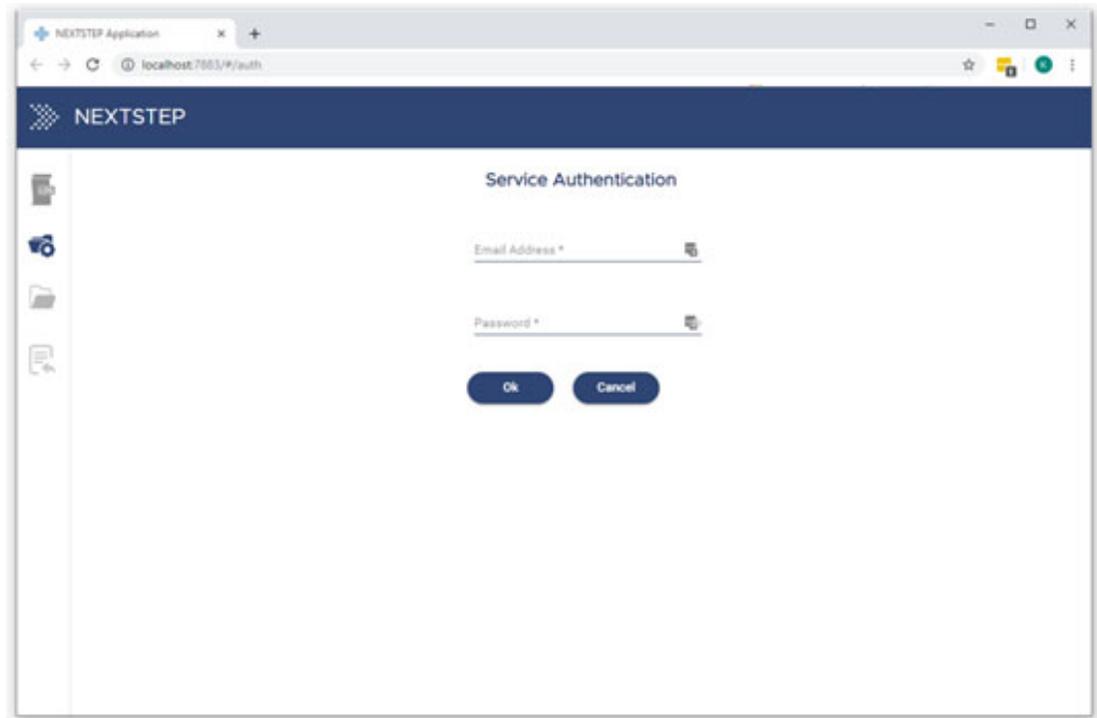
## Getting Familiar with the Interface

Launch the Folder Monitor user interface from the Start menu:



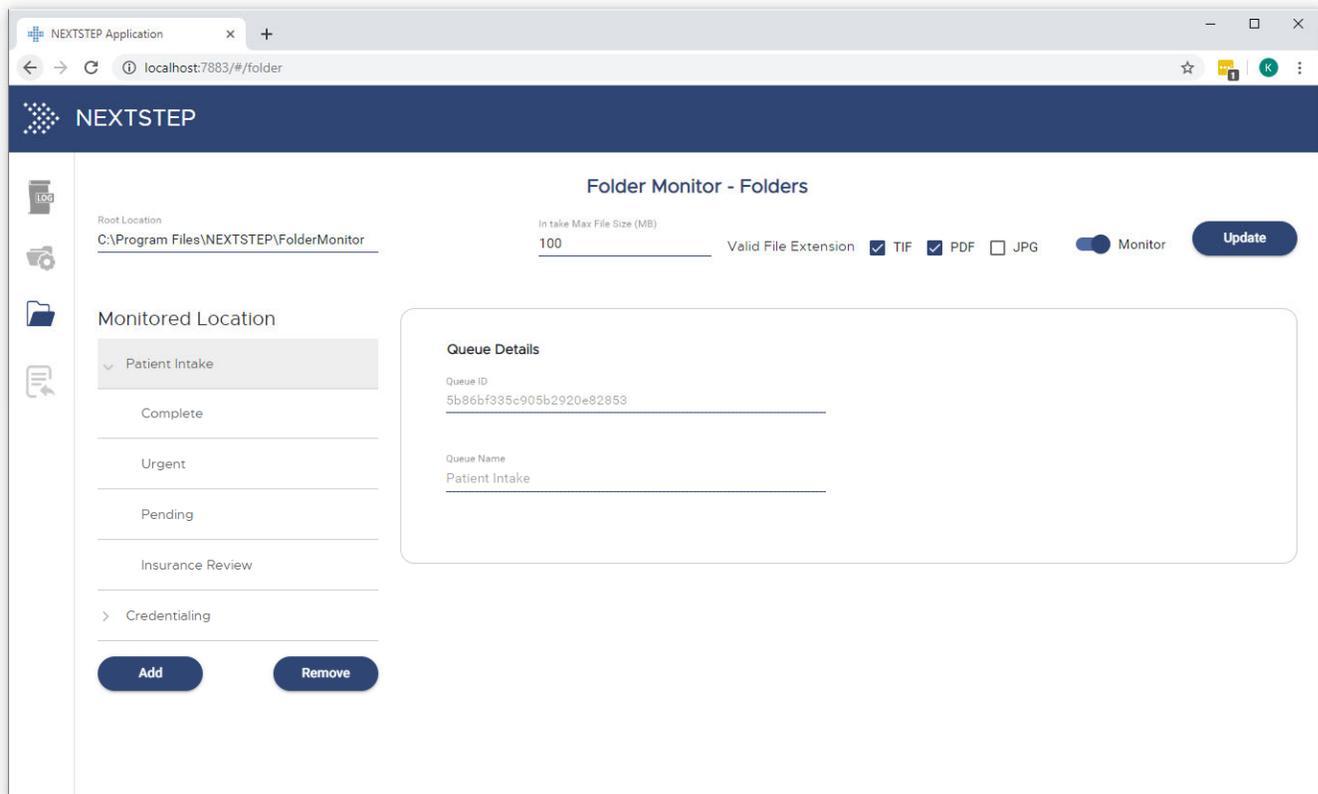
## Authentication

The first step after launching the user interface is to login using Concord NEXTSTEP user credentials that have access to the shared queues you wish to upload to or download from. These credentials will be retained for the operation of Folder Monitor but can be reset by returning to the Service Authentication page.

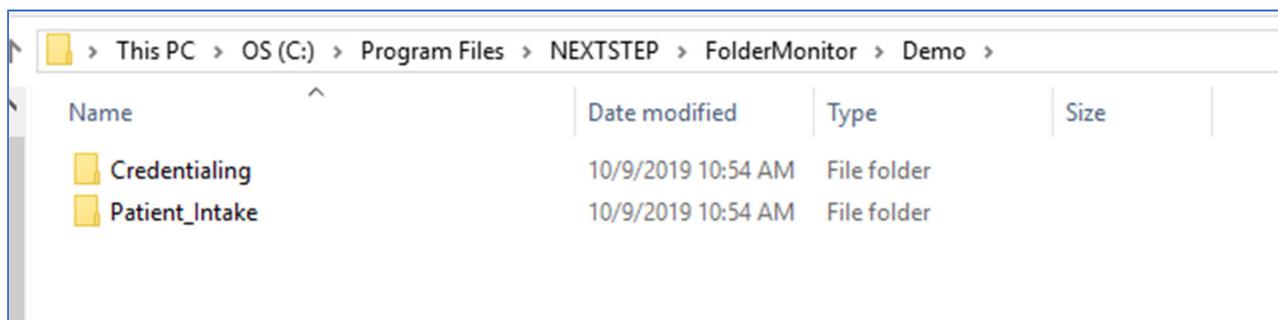


## Document Intake Configuration

This section of the user interface allows for the configuration of the document intake (upload) process. Enter the Root Location file path and click Add to choose the Concord NEXTSTEP shared queues that you wish to upload to. Configure the maximum file size and file types, toggle the Monitor switch to On, and click the Update button to apply changes.



Folder Monitor will automatically create the nested folder structure within the Root Location.

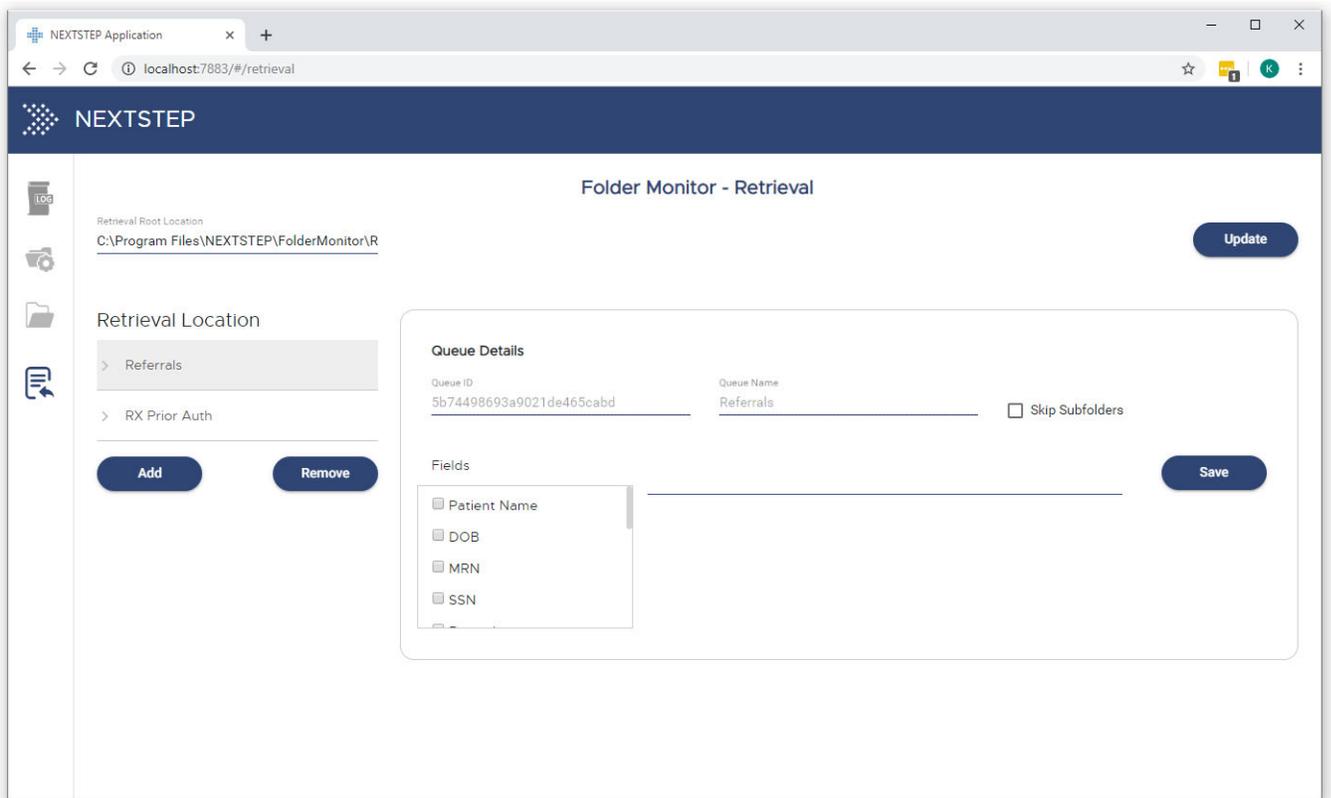


After the configuration is complete, users or applications can drop files into the monitored folder locations to submit them automatically to the appropriate NEXTSTEP queues.

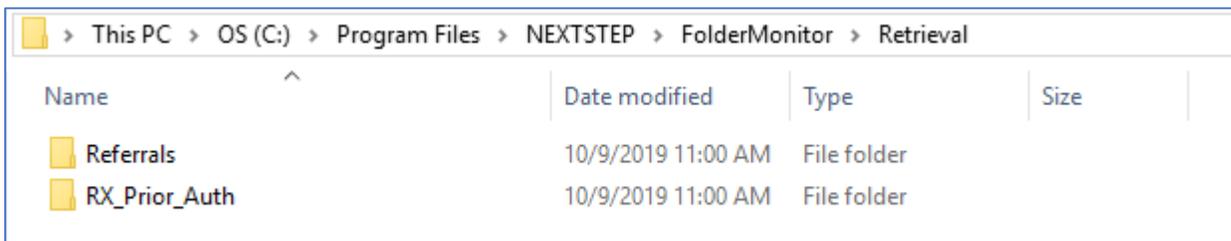
### Document Retrieval Configuration

This section of the user interface allows for the configuration of the document retrieval (download) process. Enter the Root Location file path and click Add to choose the Concord NEXTSTEP shared queues that you wish to download from. The Queue Details section allows

you to configure the file name format using Custom Fields associated with each shared queue. Please contact Concord support for more information on configuring these fields and options for triggering the download process.

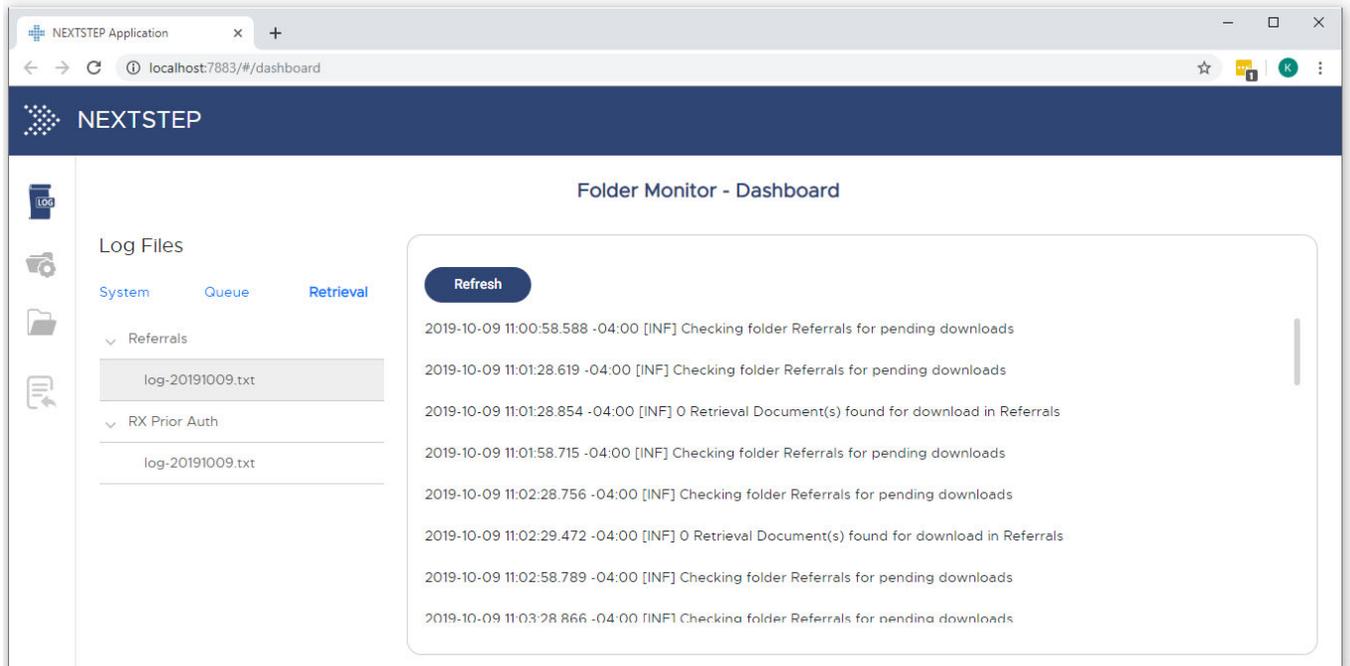


As with the Intake process, Folder Monitor will automatically create the nested folder structure within the Root Location.



## Logs

The Logs section shows log files for the system processing and both the Intake and Retrieval processes. This allows you to monitor Folder Fax application activity, research problems or provide to technical support.



## Concord Support

Should you need any assistance with Folder Monitor or any other Concord product or service, please contact our Premium Support Team.

- ✦ Email: [premiumsupport@concord.net](mailto:premiumsupport@concord.net)
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