

UC Import Folders

Version 3.6

for Filesite/Desksite 8.5/9.0/9.2/9.3(x86)



The graphic for 'UC Export Folders' features a blue folder icon on the left with a blue arrow pointing to a screenshot of a file explorer window. The window shows a tree view of folders: Documents, Marketing, Sales, Futures, Mission Fox, Project Fraser, Prospects, and Support. To the right of the screenshot, the text reads 'Exports workspace, tabs, folders and documents' and 'For Filesite 8.x, 9.x Desksite 8.x, 9.x'. At the bottom left is the UC LOGIC logo, and at the bottom right is the website address 'www.uclogic.com'.

UC Export Folders

Exports workspace, tabs, folders and documents

For Filesite 8.x, 9.x
Desksite 8.x, 9.x

www.uclogic.com

- Imports folders and subfolders directly into existing workspaces
- Imports multiple documents at the same time
- Filter just those extensions needed to be imported
- Integrated into Filesite and Desksite clients
- Customisable limit for number of files to be imported
- Extracts Email fields from MSG files (from, to, cc, sent, received)
- Converts EML to MSG during import

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1. Support

For support, please contact support@uclogic.com

2. Installation

First ensure all Worksite clients are closed. This includes Outlook, Desksite and any integrated applications (e.g. Word, Excel, Powerpoint, Acrobat)

The installation process updates registry keys in HKEY_LOCAL_MACHINE, so you need to install the application as a user that has rights to update this part of the registry.

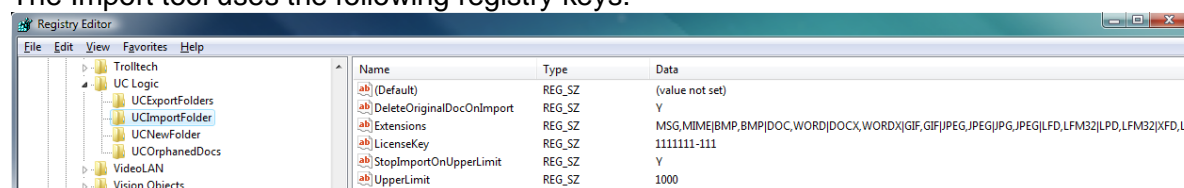
Run the setup.exe and follow instructions

When prompted for the licence key, enter the supplied code. If you enter any other code, you will install a trial version only. The trial version can be changed to a full version at a later date by adding the full licence code. Instructions on how to do this will be supplied with the licence code.

3. Configuration

The installation sets a number of registry keys that determine the way the application operates. (HKEY_LOCAL_MACHINE\Software\UC Logic\UCImportFolder)

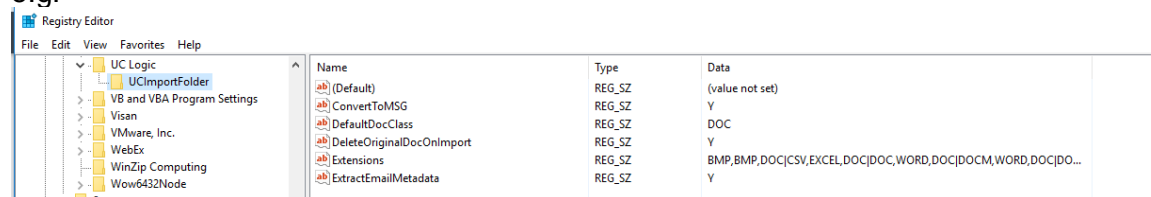
The Import tool uses the following registry keys:



Registry Key	Description
DeleteOriginalDocOnImport	Determines if the import tool moves or copies the docs (this just sets the default for the check box on the dialog)
Extensions	Determines the file extensions to import and the associated application code/document class in Worksite database. These are entered as values separated by commas, e.g. DOC,WORD,LETTER. Multiple entries are separated by symbol, e.g. DOC,WORD,LETTER XLS,EXCEL,SPREADSHEET The format is : extension,application,docclass
LicenseKey	License key, any number other than the proper code will result in the application running in trial mode
StopImportOnUpperLimit	Determines if the import process should allow the user to still import docs if the total number of docs to import is greater than the UpperLimit value
UpperLimit	Determines how many docs can be imported before a warning message is displayed.
DefaultDocClass	The default document class to use if an invalid one is defined in Extensions registry key
Log	Y/N – specifies if a log file is generated
ShowAmendButton	Y/N – specifies if the Amend Application List button is visible It is recommended that this is only set to Y for administrators. Users should not have this option visible.
ShowAdvancedButton	Y/N – specifies if the Advanced button is visible Default = Y

As the application is used, the user's settings will be saved to HKEY_CURRENT_USER\SOFTWARE\UC Logic\UCImportFolder

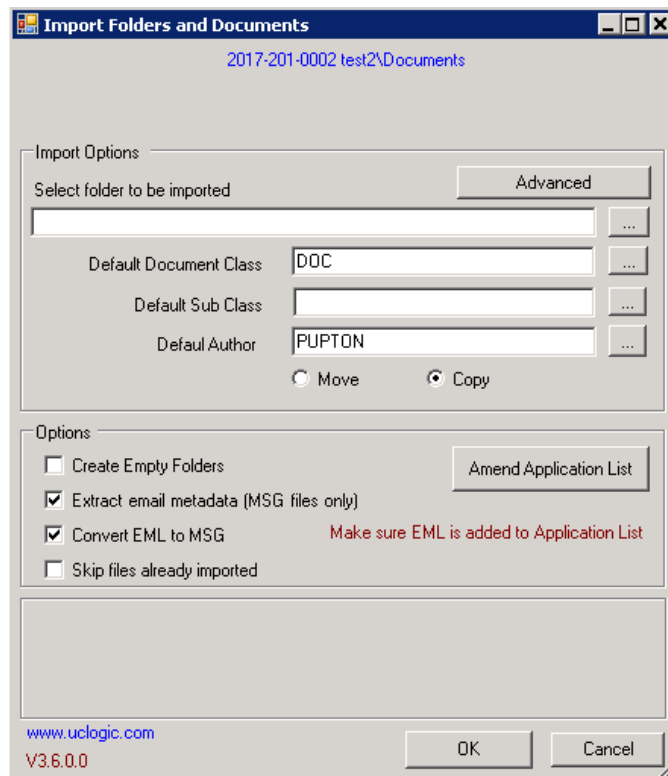
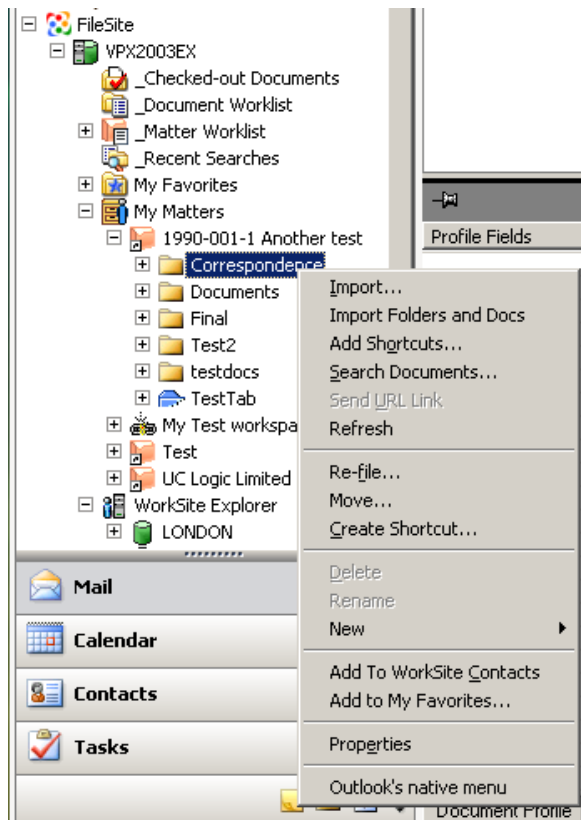
e.g.



These will override the keys in HKLM. If they don't exist in HKCU, the HKLM keys will be used.

4. Usage

Restart Outlook/Desksite and the menu should now be available when right clicking on a document folder



4.1. Basic Operation

Using the main dialog as shown on page 5, you will need to select the folder to import, the default document class to use, the author and whether you want to move or copy the documents.

When importing a folder the following applies:

- All subfolders of the selected folder will be included in the import.
- Only files matching the extension filter list will be imported. These are configurable (see section on configuration)
- If the root folder selected for import matches an existing folder below the worksite folder initially clicked, then this folder will be used for the starting place. If the folder does not exist, it will be created.
- There is a limit to the number of files that can be imported. If the import is going to import more than this limit, a message will be shown to warn the user. Depending on how the application is configured, the user can either proceed, or will be prevented from importing that many files. (See section on configuration).
- Skip files already imported just compares the document name with ones already in the folder, it does not compare dates. Any docs already found in the imported folder with the same name and extension will be skipped if this option is checked.

4.2. Extracting Email Metadata

Email metadata can be extracted from MSG files as they are imported. Click the option on the main screen to enable this feature.

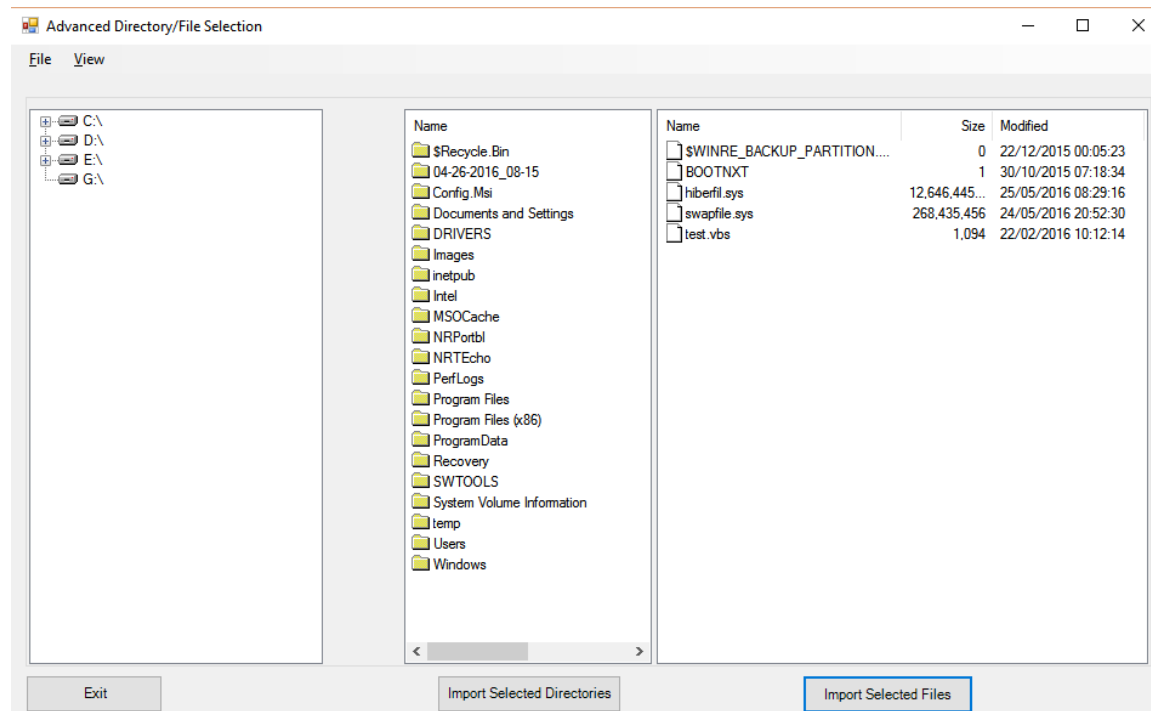
Extract email metadata (MSG files only)

This will add the following metadata to the MSG document profile.

Custom13	From
Custom14	To
Custom15	CC
Custom21	Date Sent
Custom22	Date Received

4.3. Advanced Operation

Multiple folders or multiple files to be imported using the advanced button from the main dialog.

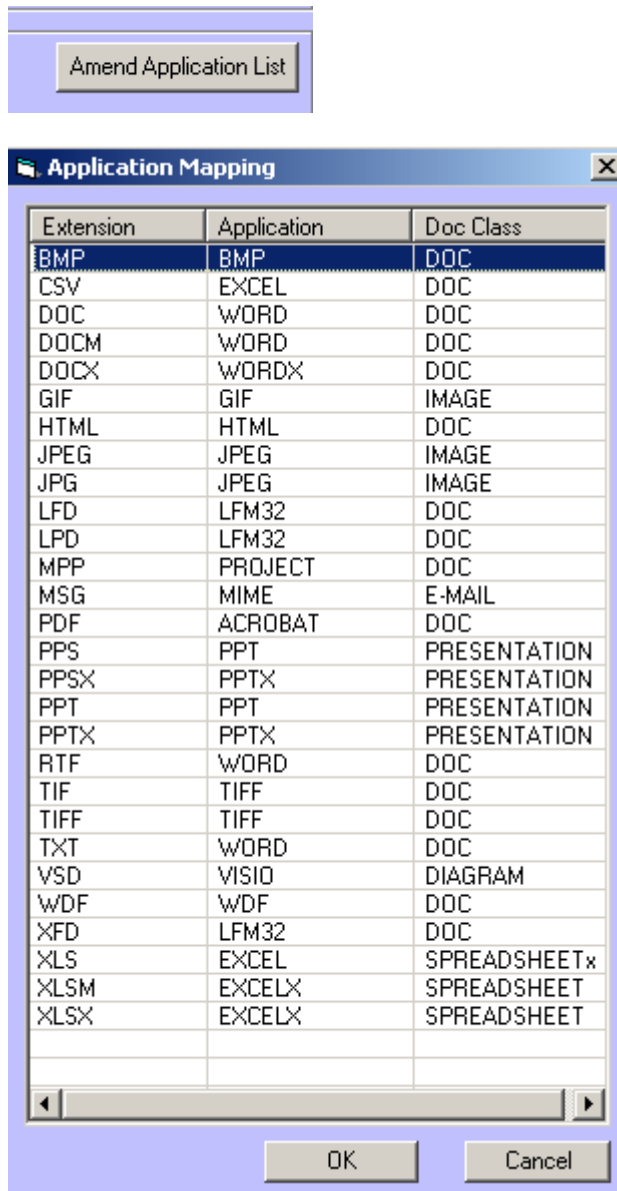


Browse to the drive and subfolder required using the left hand window and either select the directories you want to import or select the files you want to import, then click the relevant button beneath your selection. You cannot select directories and files together in one import run.

When you click the import button you will be returned to the main dialog, where you can select the default document class, author and move or copy and start the import.

4.4. Defining Extensions to Import

The files that are imported are determined in the registry setting 'Extensions' as described in section 3. This can either be edited manually using regedit, or if the registry setting 'ShowAmendButton' is set to Y, these entries can be edited from the application.



Right click an entry to edit, delete or ads a new value.

The format of entries should be:

Extension, application code, doc class code

e.g.

DOC, WORD, LETTER

This will allow file extensions doc to be imported with an application code of DOC and a document class of LETTER

Only extensions listed will imported, any files with an extension not in this list will be ignored during the import process.

If you need to specify a sub class use a : character to separate class and subclass. E.g.

DOC,WORD,CORR:LETTTER

This will import files with an extension of doc, set the application code to WORD, the class to CORR and the subclass to LETTER

If you happen to enter an invalid document class value in this screen, then when the document is being imported it will default to use the document class as specified on the main dialog screen (Default Document Class field).

4.5. Converting EML to MSG

If you are selecting the option to convert EML to MSG, then you must manually add an entry in the application mapping list, e.g.

EML,MIME,E-MAIL