

# Foldr Export Custom Node

## Introduction

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Custom Nodes are a new feature of Square 9's GlobalCapture and GlobalAction and are available from version 2.3.x. Custom Nodes are a replacement for Call Assembly nodes and extend the functionality of GlobalCapture and GlobalAction but in way that is more familiar to workflow designers than the Call Assembly nodes.

File management can get messy when you are using multiple providers like OneDrive, Box, Google Drive and Dropbox. It gets even messier when you add in your On-Premise file servers. Foldr provides a simple unified interface to all these endpoints and [much more...](#)

The Foldr Export Custom Node leverages the power of Foldr to enable you to export files and their metadata from your GlobalCapture workflows into just about any storage silo.

## Pre-Requisites

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The following items are required:

- GlobalCapture (version 2.3.0.0 or newer).
- Foldr (version 4.19.0.0 or newer).
- Foldr Export Custom Node - [b34b0984-3233-44ce-928f-8af8a1e81685.s9n](#).
- A license file.

## Installation

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To install the Node:

1. Log into GlobalCapture with an account that can administer GlobalCapture.
2. Navigate to [Mange >> Nodes](#).
3. Click the Menu button in the bottom right corner of the interface and choose Upload S9N File (the middle option).
4. Browse for the node package - [b34b0984-3233-44ce-928f-8af8a1e81685.s9n](#) and click open to install.

## Default Node Configuration

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To configure the default properties for the Node, click on the three-dot menu and select edit and the node's properties will be displayed.

There are two types of default configuration available:

1. If you click on Modal Preview and enter any values, these properties will then be pre-populated when the node is added to a workflow.
2. If you click on Config you are presented with a JSON view of the node's configuration. This contains the properties that can be on the node's config panel as well as properties you only need to set once per install, for example, the path to the license file. Any properties configured here will override the properties set on the node's config panel, configuring all nodes on all workflows to use this value. To remove an override, edit the

property's value and set it to `null`.

If you need assistance on how to edit a JSON file please contact support.

Once you have completed configuring any properties, click on save.

## Licensing

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The node requires a license to function. If it is added to a workflow without a license being present, then no processes will be created. Please contact sales to enquire about pricing and obtaining a license.

Once you have obtained a license file, save it somewhere safe, it also needs to be saved in a location that the login user for the GlobalCapture service(s) has access to. Next you need to configure the node's default config to point to this file by editing the value for the `licenseFilePath` property.

**Note:** As you can see in the sample value provided, any back slashes need to be escaped for the JSON to be valid, for example: `"C:\\Node License File\\app.license"`

Once you have completed configuring the license file path, click on save.

## Foldr Configuration

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This document assumes you are familiar with Foldr administration and usage. If you require assistance in configuring Foldr please contact support. The following configuration is all performed within Foldr Settings.

### Enable Non-Foldr Clients

By default, access is only enabled for clients created by Foldr.

- **Device & Clients >> Web & Other >> Other clients**  
Enable Other (Non-Foldr) Clients.

### Search and Custom Fields

Configuring Foldr's Search and Custom fields are only required if you are exporting metadata from GlobalCapture along with the file.

- **Search**  
Enabling and configuring Foldr's Search is a large subject which is covered in detail in the following Knowledge Base Article - <https://kb.foldr.io/foldr-support/foldr-search-setup-v2>
- **Shares & Storage >> Custom Fields**  
Create the Custom Field(s) to export the Process Field data to.
- **Shares & Storage >> [Share-Name] >> Search and Data >> Custom Fields**  
Add the Custom Field(s) to the appropriate share(s) then edit the field's permissions so that the user the node will be authenticating as can Write and Edit.

## Foldr Authentication

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To interact with Foldr's API you need to authenticate and acquire an access token. The Foldr user you authenticate with does not have to be anything special, but they do need access to the resources being imported into GlobalCapture.

We have created an authentication utility that will log a user into Foldr and securely store the access token for later use by the node - Selectec.FoldrAuth.exe. This is a simple utility that asks for the address of your Foldr appliance and the credentials of the Foldr user, then logs that user in and stores their access token.

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Foldr Authentication

1. Enter your Foldr appliance's address:
https://foldr.yourdomain.com
Verifying connection to Foldr...
Success >> Contacted the Foldr server

2. Enter username:
square9

3. Enter password:
*****

Obtaining Access Token...
Success >> Stored Access Token in Credential Manager for user: square9

Press any key...
```

**Note:** The Foldr Import Node and the Foldr Export node share the same credentials so if you have already authorised once for another node you do not need to repeat this.

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### Important

The FoldrAuth utility stores the access tokens securely in the Windows Credential Manager. The Credential Manager is a per-user store which means that the FoldrAuth utility must be ran as the same user as the GlobalCapture Engine Service executing the workflow.

We recommend using the SSAdministrator user account to configure the FoldrAuth utility and as the Login Account for the GlobalCapture Engine Service.

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## Foldr Appliance Connection

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The node has several properties that will only be set once per install. These properties are configured as described in Option 2 of Default Node Configuration.

- **Appliance Address (applianceAddress)**  
Enter the address of your Foldr appliance, for example: <https://foldr.yourdomain.com>.
- **Certificate Thumbprint (applianceCertificateThumbprint)**  
The Certificate Thumbprint is only required for connections where the Foldr appliance certificate does not fully validate, for example, a self-signed certificate. The thumbprint can be obtained by opening a page from the server in a browser then viewing the certificate's details. Once configured the node will ignore the certificate's invalidity and accept it if the thumbprints match.

## Workflow Configuration

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The node is used like any of the built-in nodes in the workflow designer, drag it from the node toolbox onto the designer's canvas, configure the properties and link it up as is appropriate for your workflow.

### Configure the Node

#### Import

➤ **Share ID**

Enter the ID of the Share being exported to. The Share ID can be viewed inside the square brackets, after the Share's name on:

Foldr Settings >> Shares & Storage >> [Share-Name]

➤ **Folder Path**

Enter the path to export to.

➤ **File Naming Format**

Enter the name to export the file as.

➤ **Overwrite Existing Files**

If a file of the same share, path, and name as the one being exported already exists, then:

- Enabled - Foldr will overwrite the original file.
- Disabled - Foldr will rename the new file.

#### Field Mapping

➤ **Process Fields**

Select a Process Field to read from.

➤ **Foldr Fields**

Enter the name of the Foldr Field to write to.

➤ **MV**

If the Process Field is a multi-value field check the MV box and an entry will be written for each result read from the Process Field.

#### Table Mapping

➤ **Table Field**

Select a Table Field to read from.

➤ **Process Fields**

Enter a comma separated list of the IDs of the Process Fields that comprise the table. The ID for each Process Field can be seen in the Field Catalogue by clicking the three dots on the right-hand side of the Process Field definition.

➤ **Foldr Fields**

Enter a comma separated list of the names of the Foldr Fields to write to.

**Note:** You do not have to enter all the Process Fields that comprise the table, but each one entered does require a corresponding Foldr Field.

**Note:** The order of the Process Fields does not have to be the same as the order in the Table Field, but it does have to match the order in the Foldr Fields to ensure a correct mapping.

## Contacts

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Sales and licensing enquiries to: [sales@selectec.com](mailto:sales@selectec.com)

Support enquiries to: [support@selectec.com](mailto:support@selectec.com)

## Acknowledgements

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Selectec Custom Nodes are made possible by open-source software. The following open-source software is distributed and is provided under other licences.

- Custom Workflow Nodes  
<https://github.com/Square9Softworks/custom-workflow-nodes>
- Nett  
<https://github.com/paiden/Nett>
- BouncyCastle  
<http://www.bouncycastle.org/csharp/>
- Meziantou.Framework.Win32.CredentialManager  
<https://github.com/meziantou/Meziantou.Framework>
- Newtonsoft.Json  
<https://www.newtonsoft.com/json>

Thank you to the developers of these softwares.