

# Foldr Import 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 Import Custom Node leverages the power of Foldr to enable you to import files and their metadata into your GlobalCapture workflows from just about any storage silo. This import is search based, you create a Foldr search query that matches the documents you want to import, and the documents found by that search will be imported into the workflow.

## 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 Import Custom Node - [af863c97-a995-4a9b-b213-cf03b3791362.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 - [af863c97-a995-4a9b-b213-cf03b3791362.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.

### 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>

### 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.

### Preventing Duplicate Imports

The node can prevent a file from being re-imported after it has been processed. It does this in one of two ways, by setting a Foldr Custom Field or by Deleting the file. If you select to set a Foldr Custom Field, you need to create that field.

This processed field is set after the document has been imported and as it will be used as a condition in the search query, that document will not be in the results the next time the search is executed.

- **Shares & Storage >> Custom Fields**  
Add a new Custom Field.

- Name can be anything, for example "Processed by Square 9".
- Type is Boolean.
- Multi-Value is disabled.

➤ [Shares & Storage >> \[Share-Name\] >> Search and Data >> Custom Fields](#)

Add the Custom Field to the appropriate share or shares you will be searching on 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.

```
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.

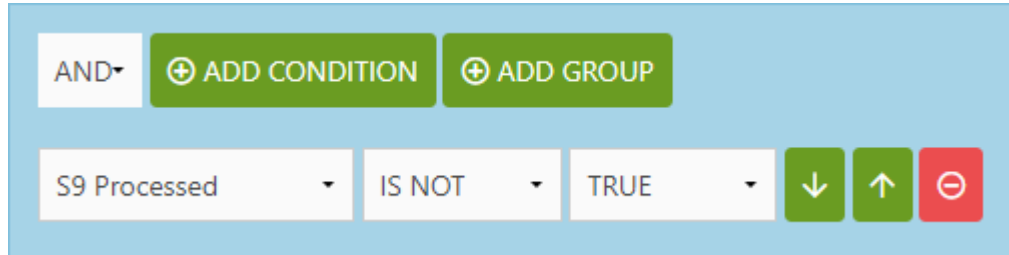
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## Foldr Search

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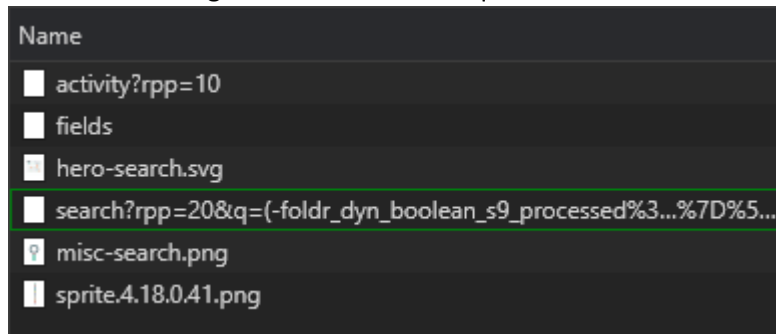
As mentioned previously the set of documents to be imported is driven by Foldr Search – the documents found by the search will be the ones imported in the workflow. How you design your searches depends on the goal you are trying to achieve, but the basic process is as follows:

1. Log into Foldr as the user you authenticated with the FoldrAuth utility. Logging in as this user ensures that the results of the search will match those the node retrieves.
2. Navigate to Search >> Advanced.
3. Use the query builder to create your search.
  - a. The only required condition is the Processed Field. If this field is not included the import will be considered an error by the node. The condition for this field should be:  
[Field Name] - IS NOT - TRUE



- b. Add the remainder of your conditions.
4. Run the search and check the results are correct.
  5. The search that is submitted to Foldr's API is not readily available through the Foldr user interface. However, it is available through the browser's developer tools.  
To do this, using Chrome as an example, is as follows:

- a. Press F12 to open the developer tools.
- b. Click on the Network tab.
- c. Run the search again and the search requests will be listed.



- d. Right click on the request starting "search?", expand the copy menu and select copy link address.
- e. Save the address for use in later in the Workflow Configuration.

## 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

- **Search Query**  
Enter the search query you copied from the browser's developer tools earlier.
- **Prevent a file from being re-imported by**
  - **Setting a Foldr field**  
Enter the name of the Foldr Custom Field that you create to indicate a document has been processed.
  - **Deleting the file**  
The file will be deleted from the source once imported.

#### Field Mapping

- **Foldr Fields**  
Enter the name of the Foldr Field to read from.
- **Process Fields**  
Select a Process 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 Foldr Field.

#### Table Mapping

- **Table Field**  
Select a Table Field to write to.
- **Foldr Fields**  
Enter a comma separated list of the names of the Foldr Fields 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.

**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.

## Fldr System Fields

As well as mapping Fldr Custom Fields to the Process fields you can also map the imported files' built-in properties. These properties include:

- f\_ShareId
- f\_ShareName
- f\_Folder
- f\_Path
- f\_Name
- f\_Size
- f\_Modified
- f\_MimeType

## Troubleshooting

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When errors occur within Import Nodes they can occur before a process is created and therefore errors may not be visible in the Batch Portal. If the node is not behaving as expected, stop the Global Capture service (ideally when it is not processing any processes) and run the GlobalCapture.exe as an admin. When ran this way in a console, GlobalCapture defaults to debug mode and will output far more information which will help you resolve issues.

## 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.