# Tarvos Alchemy Folder Creator and Designer Manual

## Version 1.5

## Revision History

| Date | Version | Description | Author |
|---|---|---|---|
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# Manual

## 1. Introduction

This document describes how the Tarvos Alchemy Folder Creator Service and Tarvos Alchemy Folder Designer can be used.

### 1.1 Purpose

The purpose of the Tarvos Alchemy Folder Creator Service is automatically create folders in an Alchemy database when information is added to a SQL database table.

The purpose of the Tarvos Alchemy Folder Designer is to create and change a folder tree definition that can be used by the Tarvos Alchemy Folder Creator service.

### 1.2 Prerequisites

To use this document, the following knowledge is needed:

- Basic SQL knowledge
- Captaris Alchemy security understanding

Before using the service, a license file is needed.

## 2. Installation

An installer is provided to install the two applications on a Windows computer.

Previous versions of the applications will be removed in the installation process. Old settings files will not be uninstalled.

Click the Next button to continue.

When not all system requirements are met, a warning will be shown and the installation will be stopped.

Specify where the applications will be placed on the file system.

Click the Next button to continue.

Click the Next button to start the installation.

Installation in progress.

When all went ok, the Close button can be clicked to end the installation.

The following start menu items will be created to configure the applications.

## 3. Creating Folder tree structures with Folder Designer

To define folder tree structures that can be used with the service. Start the Tarvos Folder Designer from the start menu.

A previous definition can be used by clicking the "**Load Tree**" button.

Click the right mouse button in the tree pane to add new folders.

Give the new folder a name and click outside the folder.

Continue adding folder when needed.

To set security on folders, an Alchemy database must be selected first.

Click the "**Set Database**" button.

Type the location of an Alchemy database or click the "**...**" button to browse to the ald-file.

It is preferred to specify an Alchemy URL when a database is managed by the Alchemy Server.

## 3.1 Use integrated security

When "**Use integrated security**" is checked, the application uses the user account that is running the application to open the Alchemy database.

Configure the service to use the correct account.

Be sure that the Alchemy Server uses this account with the administrator group in the database.

Click the "**Refresh**" button in the database dialog to show the Alchemy security groups of the database.

Remark: to test the login correctly, the service account must be the same as the current user account you are using when clicking the refresh button.

## 3.2 Set Security on Folder

Right click with the mouse on a folder to set the security group for this folder.

Double click on an available group to add or select the group and click the "**Add**" button.

Click the "**Save**" button to set the selected group(s) of the folder.

All folders that contain one or more security groups are shown with a lock.

To remove all security groups from the folders, the "**Clear Security**" button can be clicked.

## 3.3 Order folders

To move folders up and down the tree, the "**Up**" and "**Down**" buttons can be used when a folder is selected.

# 4. Configure Tarvos Alchemy Folder Creator Service

The Tarvos Alchemy Folder Creator Service can be configured by clicking the link in the start menu.

The dialog shows the defined folder processes.

## 4.1 Settings

To change global service settings, click on the "Settings…" button.

"**Use Alchemy license**" configures the Captaris Alchemy license that will be used.

Default this will be the "Indexing station".

"**Service Timer interval**" configures the interval that the service will look for processes that must be run. A process must be run when the "Next Run" value is expired.

Remark: This interval has nothing to do with the process interval. It's recommended to set this Service Timer interval to a low value.

"**Tarvos license file**" must point to the license file that is provided by your supplier.

If the license file is invalid or expired, the service will not start.

## 4.2 Add/Edit Process

To add a new process, click the "Add" button or select an existing process and click the "Copy" button.

To change an existing process, select the process and click the "Edit" button.

Below an example is shown of how a process can be defined.

With the checkmark "**Process enabled**" can a process be disabled or enabled. When disabled, the process will be ignored by the service.

Remark can be filled to give a logic name to the process.

When an error occurred, the "**Last error**" is showing what went wrong with the process. By clicking the "**Reset Error**" button the last error can be removed.

Errors that occurred in the service are also shown in the Windows Event viewer.

"**Interval**" is used by the service to reschedule the next time the process must be run.

"**Start after**" determines when the process can be used.

The "**Next time to start**" shows when the process will be run defined by the "Start after" en "Interval" values.

"**Folder settings file**" points to the file that is created with the Folder creator application. Click the browse (...) button to select a file or type a new file name and click the "**Design**" button to open the Folder designer (see chapter 3 Creating Folder tree structures with Folder Designer).

With the "**Build**" checkmark an Alchemy database can be build after creating new folders.

"**SQL connection string**" is used to connect to a SQL database.

Example: *data source=127.0.0.1;Integrated Security=SSPI;Provider=SQLOLEDB;Initial Catalog=Klanten; Trusted_Connection=yes*

Example: *data source=127.0.0.1;Provider=SQLOLEDB;Initial Catalog=Klanten; User Id=myUsername;Password=myPassword;*

Click the "**Test**" button to test the given connection string.

"**SQL Query for new values**" defines the SQL query that returns table values.

Example: *select Projectnummer from [900].[dbo].[Projecten]*

These values are compared by the values in the "**New values save list file**". If a value in the SQL query does not exist in the save list, a new folder structure will be created in the Captaris Alchemy database.

To create or reset the save list, the "**Create**" button can be used. Be sure to define a save list name that is **not** used by other processes.

"**Folder 1 Name**" defines the name of the first folder in the root folder in the Alchemy database. This folder can be defined as a static name or a SQL query.

When defining a SQL query the variable ***#NewValue#*** must be used in the query.

Example: select KlantNr + '-' + KlantNaam from [Klanten].[dbo].[Klanten] where KlantNr = left('#NewValue#', 3)

Click the "**Test**" button to test the query.

When asked for a value, use a value that is returned by the "SQL Query for new values" "Test" button.

"**Folder 2 Name**" defines the name of the folder that will be created in the "Folder 1 Name" folder. This can also be a static name or a SQL query.

Example: select ProjectNummer + '-' + Omschrijving from [900].[dbo].[Projecten] where Projectnummer = '#NewValue#'

## 5. Specific Requirements

The following items are needed to run the Tarvos Alchemy Folder Creator Service and Designer:

- Intel based machine running Windows 2000 or higher or Windows Server 2000 or higher
- .NET Framework 2.0 installed
- Alchemy 8.0 or higher installed