



**vFiler**

***Document Capture & Indexing***

## ***Addendum***

**"PublishToKMS"**

Creating the Link to  
Pinnacle Knowledge Management System

# Table of Contents

About this Guide.....3

What is PublishToKMS.....3

Setting up vFiler PublishToKMS Component.....3 - 6

Setting up Pinnacle Document Type, Fieldset and Fields.....7 - 10

Setting up Pinnacle Configuration and Controller.....11 - 12

## About this Guide

The vFiler® PublishToKMS Addendum provides conceptual and procedural information around using the PublishToKMS feature inside the vFiler® application.

## What is the PublishToKMS Feature?

vFiler® PublishToKMS is a feature that provides imaging workflow integration to the Pinnacle Knowledge Management System® via the Windows platform.

PublishToKMS allows the upload (publish) of documents, index variables, metadata, and OCR text to the Pinnacle repository via a folder created by the Pinnacle DWI Service called **watchfolder**, in the KTDWI folder, on your local file system.

Note: The Pinnacle DWI Service must be previously installed.

When documents published to this external folder monitored Pinnacle DWI Service, the document index variables, metadata, and OCR text is automatically extracted, and automatically populated to the Pinnacle KMS during the Pinnacle DWI upload process.

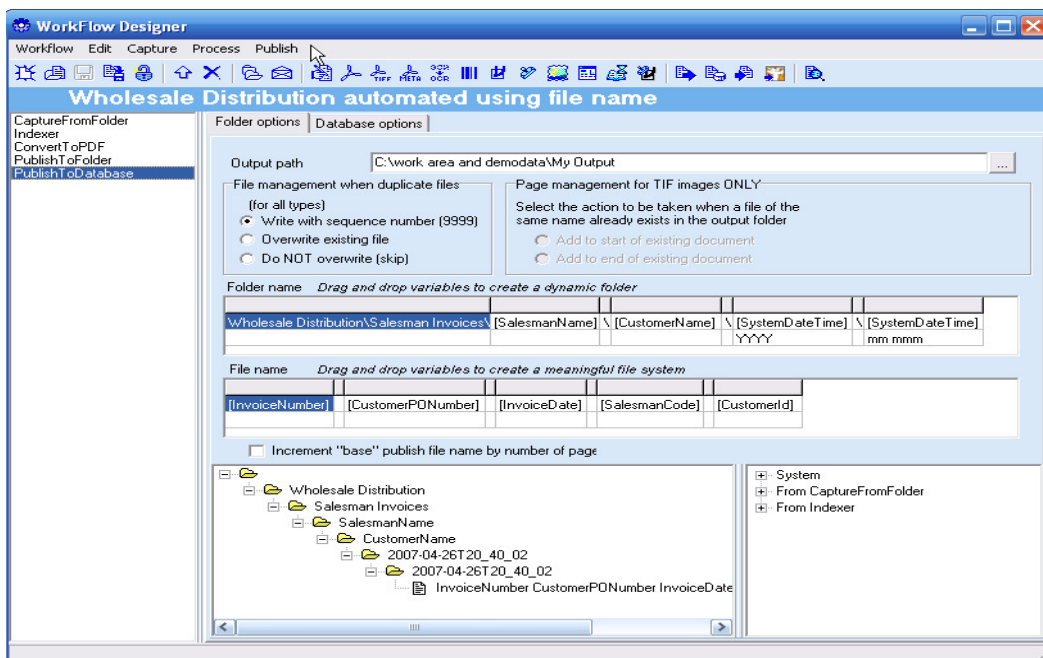
This Addendum builds on the knowledge the reader has obtained from reading previous vFiler® manuals and is not intended to provide detailed instructions on the overall use of vFiler®.

## Setting up vFiler - PublishToKMS Component

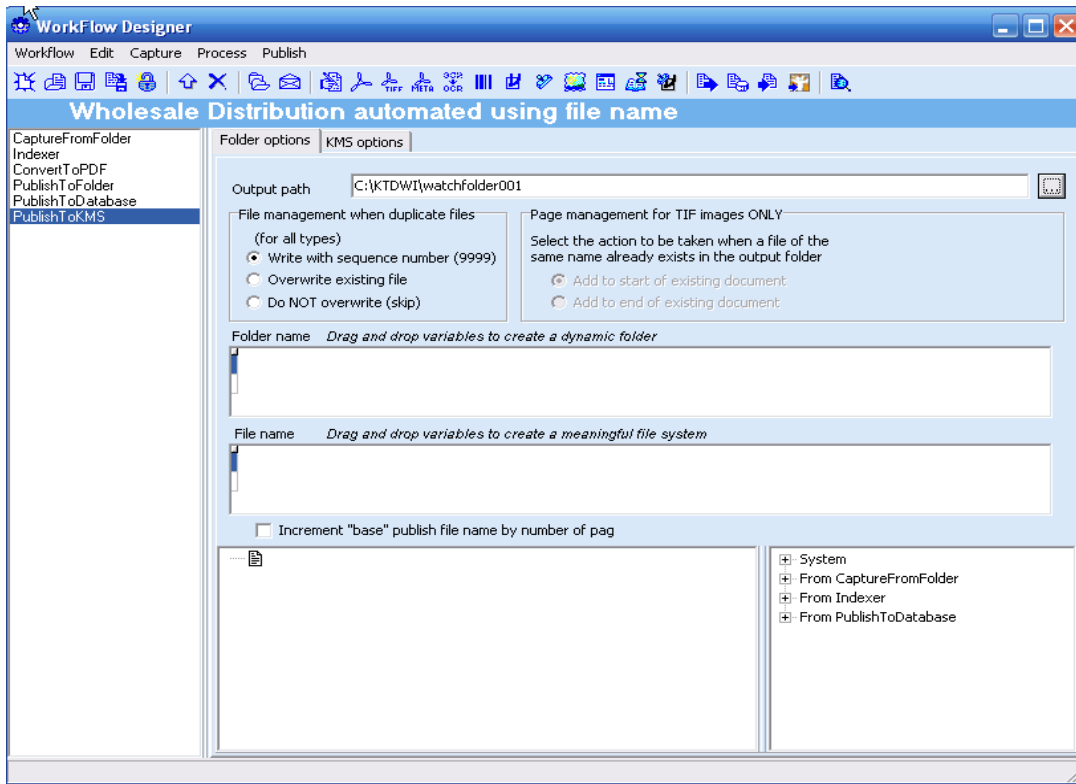
This section provides a walk through overview of the full PublishToKMS process.

### **Process overview:**

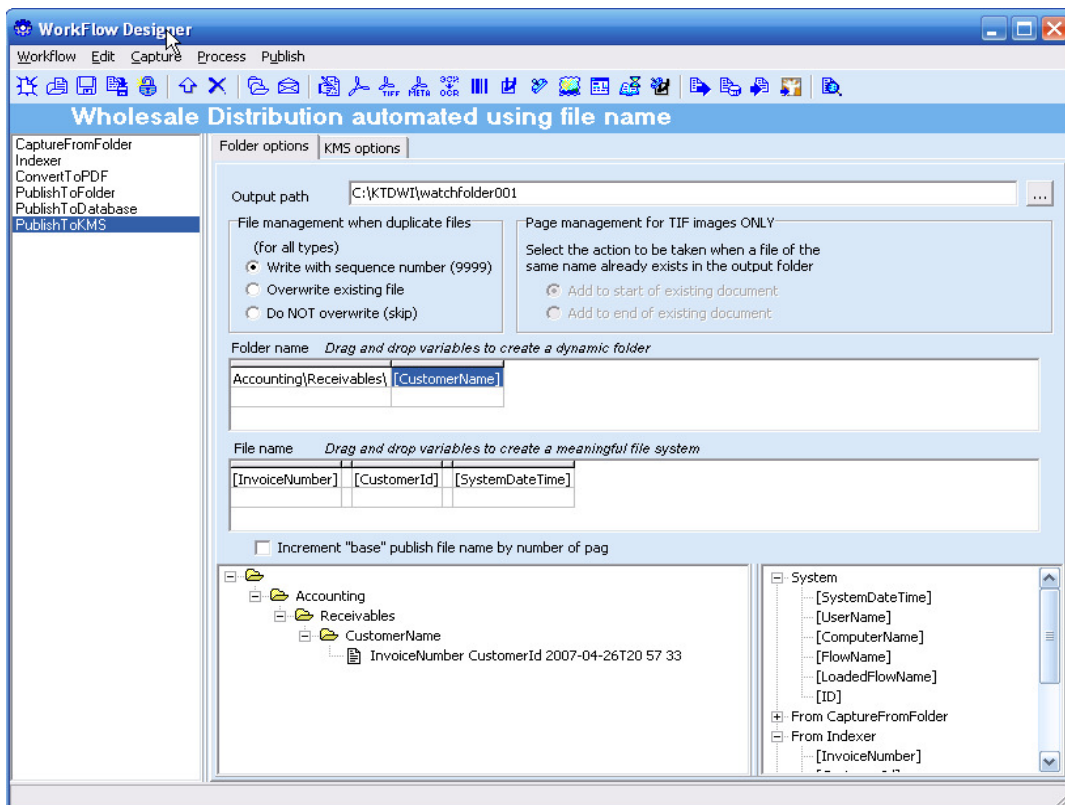
1. Open the “Wholesale Distribution\_automated using file name” workflow located in the C:\Work area and demodata\Demos\The Perfect Demo folder.
2. Open the Designer.



- 3: Load the PublishToKMS Feature
- 4: Point the Output Path to C:\KTDWI\watchfolder001

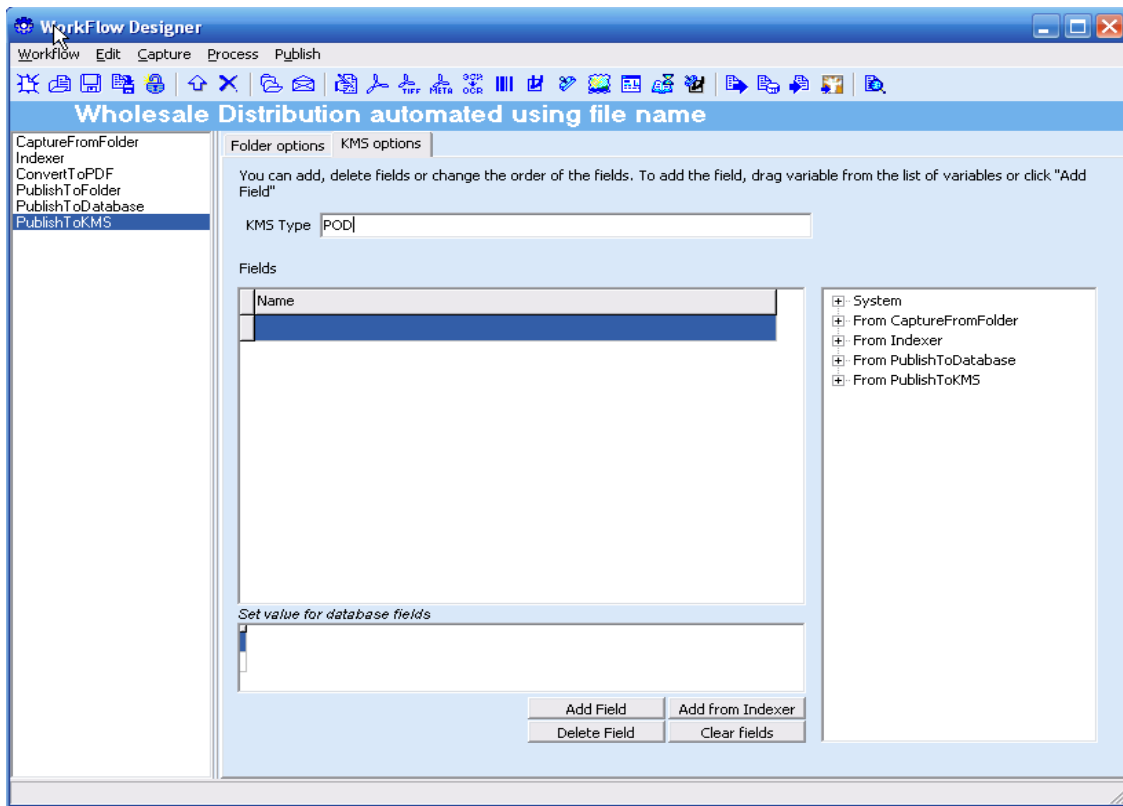


- 5: Create your folder & file names to the design of your folder structure inside **Pinnacle KMS®**.



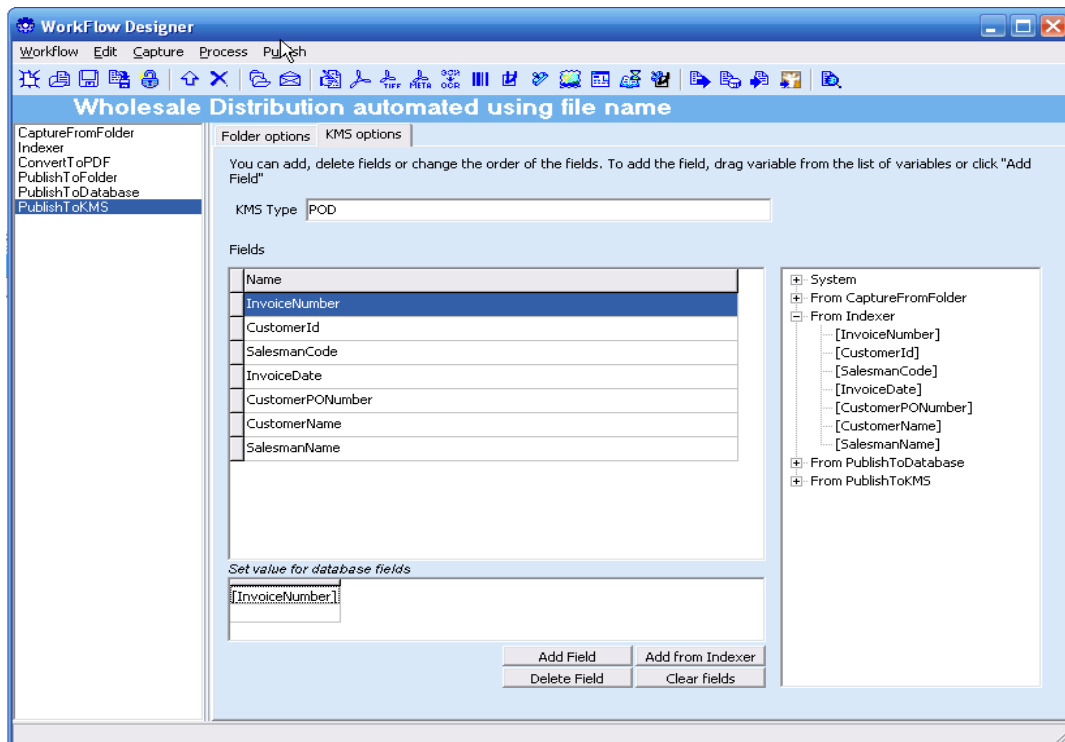
Note: The file name must have the SystemDateTime to distinguish itself

6: The KMS Type must be the same as the **Pinnacle KMS®** Document Type.

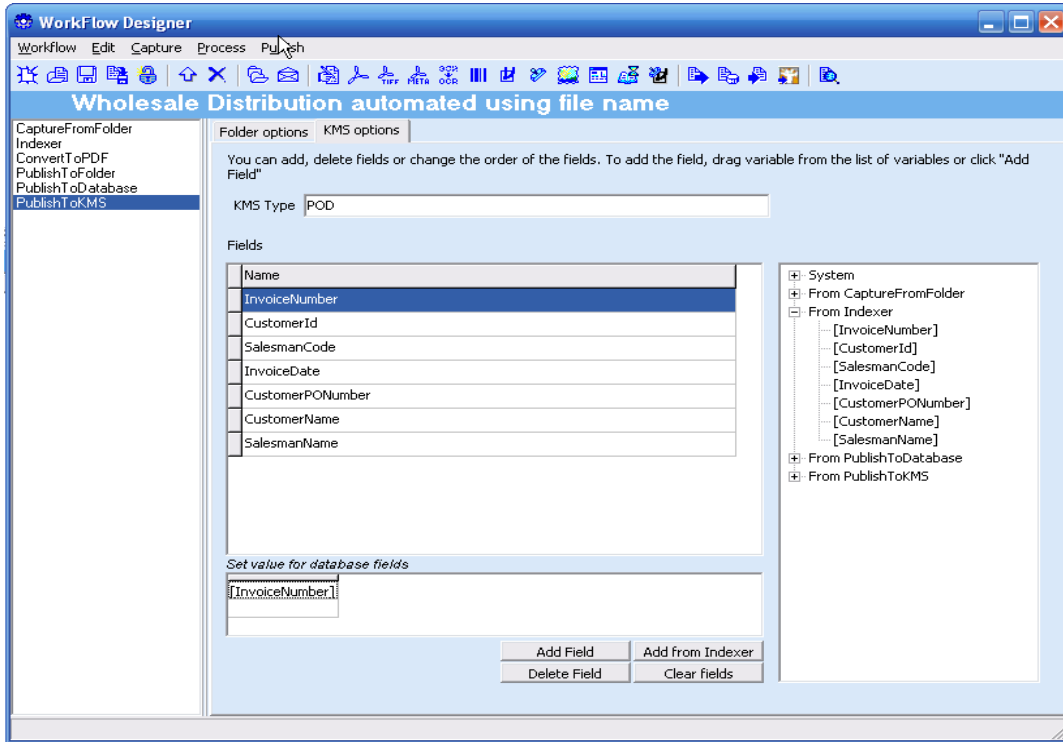


7: Click "Add from Indexer"

8: Drag your Key Index From Indexer to "Set Value for Database Fields" box.

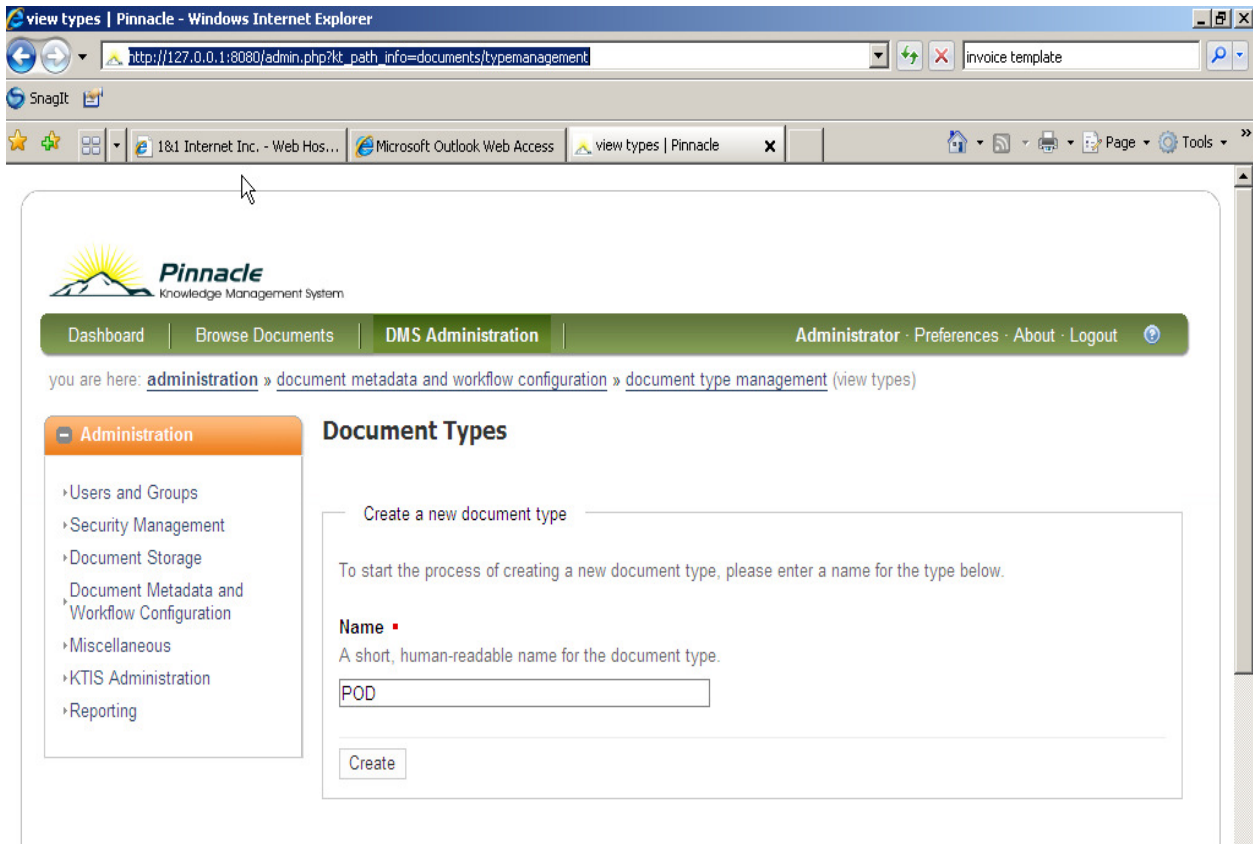


9: The fields in **vFiler®** must match identically to the fields in **Pinnacle KMS®**.

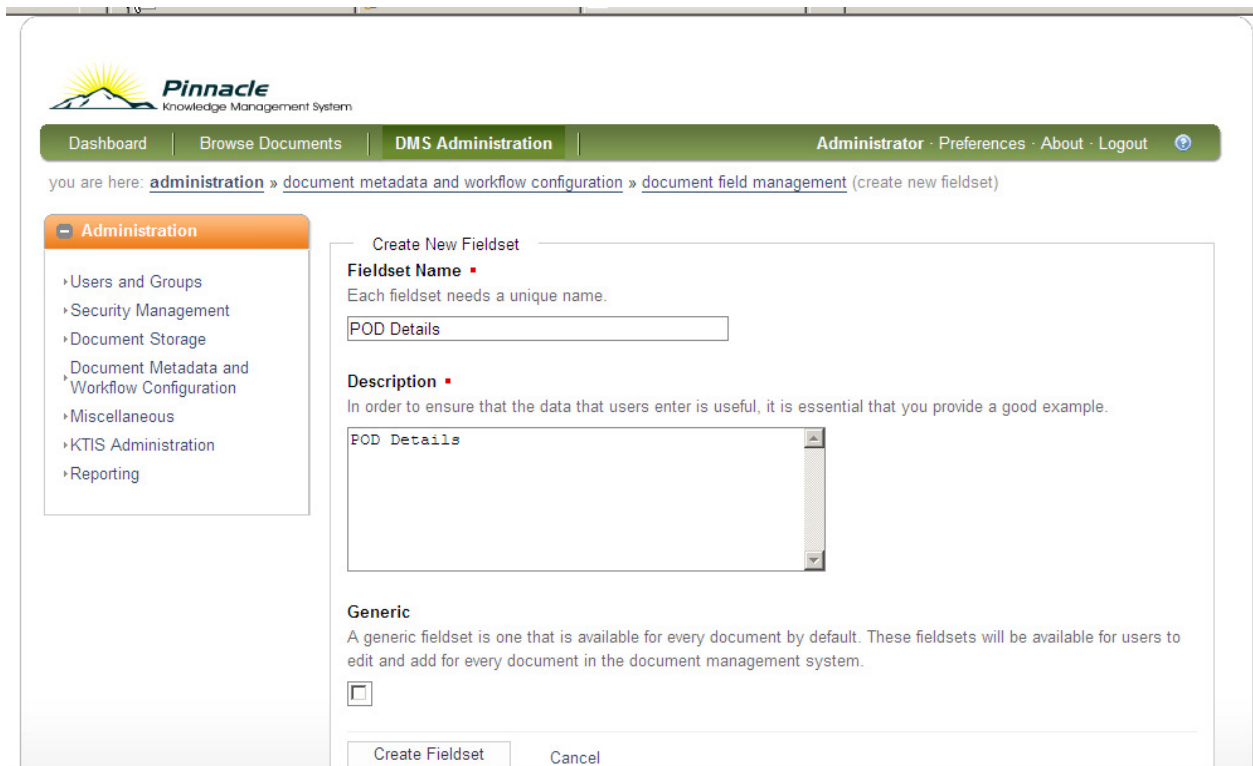


# Setting up Pinnacle KMS Document Type - Fieldset and Fields

1: Create a new Document Type - same name as configured in vFiler



2: Create a Fieldset (Document Name + Details) and leave Generic not checked.



### 3: Create Fields identical as index fields configured in vFiler

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- Security Management
- Document Storage
- Document Metadata and Workflow Configuration
- Miscellaneous
- KTIS Administration
- Reporting

#### Edit Fieldset: POD Fields

Name	POD Fields
Description	POD Fields
Generic	<input type="checkbox"/>
Used by	POD
	<input checked="" type="checkbox"/> <a href="#">Edit these details</a>

#### Additional Information

Fieldsets bring together different fields into a collection of related information.

⇒ [Add New Field](#)

Field Name	Edit	Delete	Type	Description
InvoiceNumber	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	Not Required
CustomerID	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	Not Required
SalesmanCode	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	Not Required

### 4: Associate the Document Type created with the new Fieldset - Click Edit

you are here: [administration](#) » [document metadata and workflow configuration](#) » [document type management](#) (view types)

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#### Document Types

Create a new document type

To start the process of creating a new document type, please enter a name for the type below.

**Name** ▪  
A short, human-readable name for the document type.

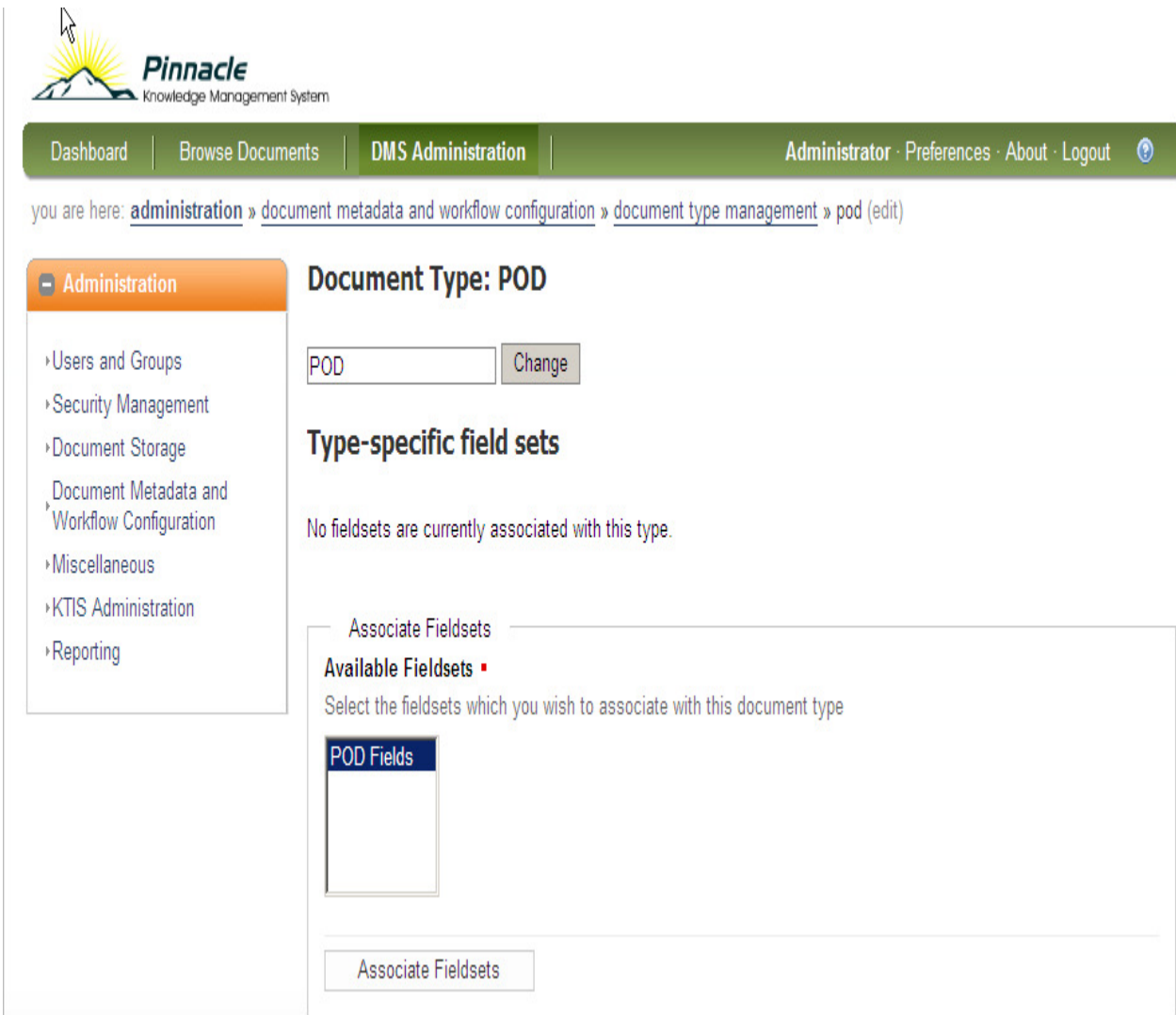
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Existing document types

Select a document type from the list below to change its details, or use the enable/disable buttons to change its availability state.

Document Type	Associated Fieldsets	Edit	Disable/Enable
Default	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>
POD	—	<input checked="" type="checkbox"/> ←	<input type="checkbox"/>

5: Associate the Document Type with the Fieldset - Highlight, then click Associate Fieldset.



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**Administration**

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### Document Type: POD

POD

### Type-specific field sets

No fieldsets are currently associated with this type.

Associate Fieldsets

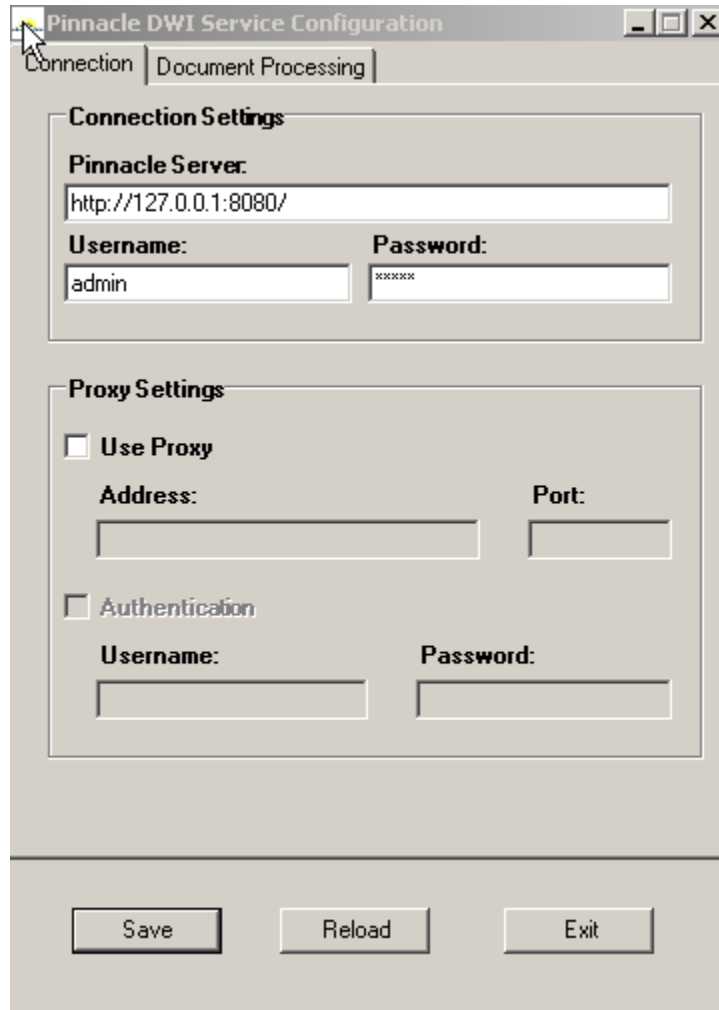
**Available Fieldsets** ▾

Select the fieldsets which you wish to associate with this document type

POD Fields

## Setting up Pinnacle DWI Configuration & Controller

- 1: Open Pinnacle DWI Configuration and set Pinnacle Server to IP of Server.
- 2: Set username to a user with admin rights. It's easier to use the admin of the system, but ensure you edit the Admin's User Profile and add more than 1 Active Session.



The screenshot shows the 'Pinnacle DWI Service Configuration' window with two tabs: 'Connection' and 'Document Processing'. The 'Connection' tab is active. The window is divided into two main sections: 'Connection Settings' and 'Proxy Settings'. At the bottom, there are three buttons: 'Save', 'Reload', and 'Exit'.

**Connection Settings**

**Pinnacle Server:**  
http://127.0.0.1:8080/

**Username:** admin      **Password:** xxxxxx

**Proxy Settings**

Use Proxy

**Address:** \_\_\_\_\_      **Port:** \_\_\_\_\_

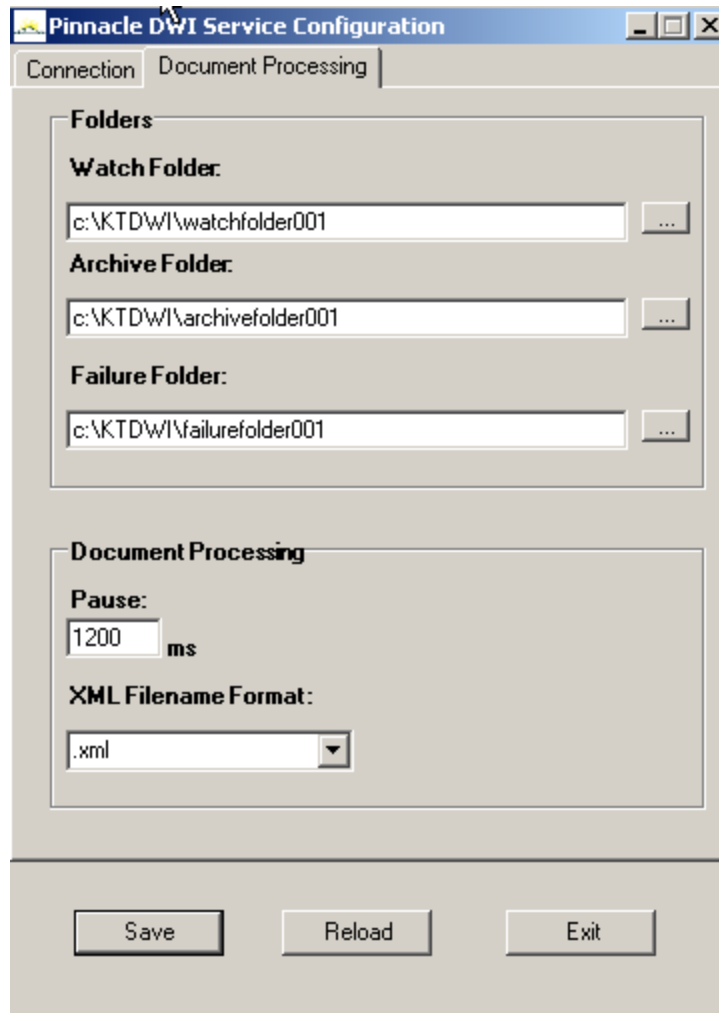
Authentication

**Username:** \_\_\_\_\_      **Password:** \_\_\_\_\_

Save      Reload      Exit

## Setting up Pinnacle DWI Configuration & Controller

- 3: Click Document Processing tab and ensure all folder paths are correct
- 4: Only increase Pause time if PC running DWI Service is slower
- 5: Change XML Filename Format to .xml

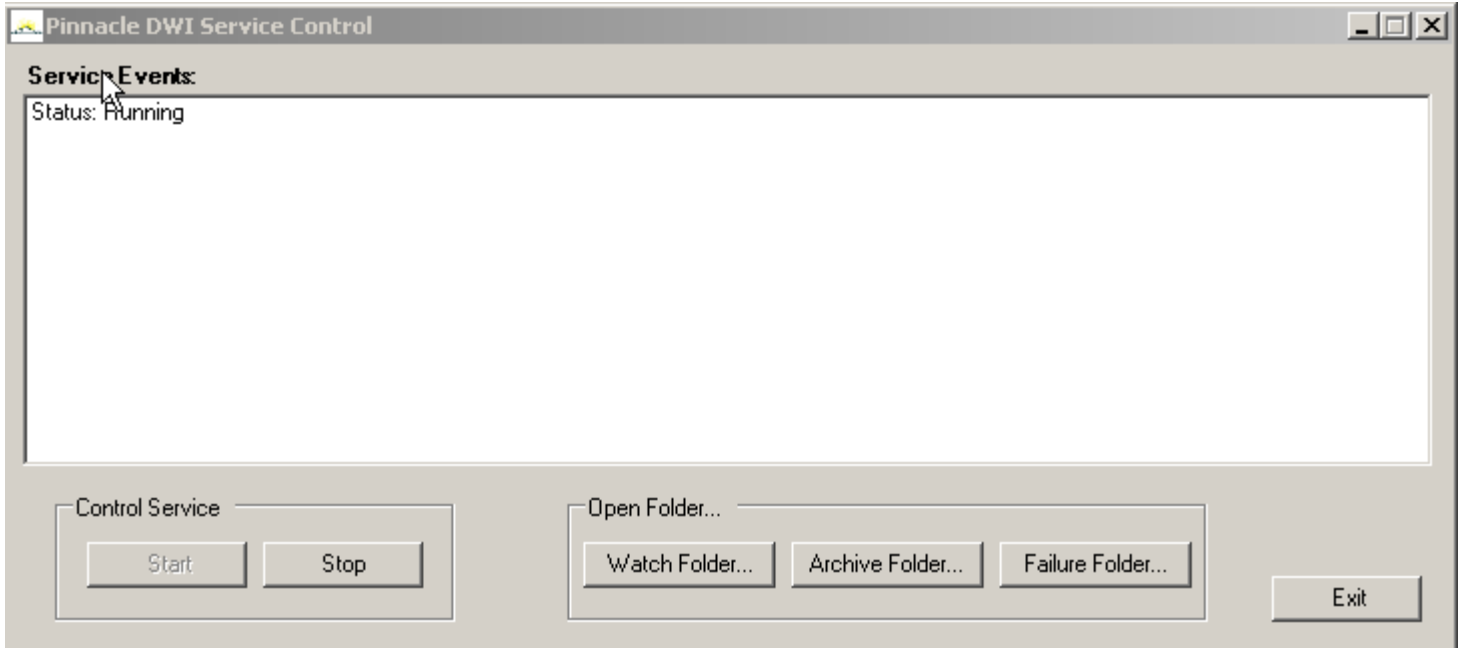


The screenshot shows the 'Pinnacle DWI Service Configuration' window with the 'Document Processing' tab selected. The window is divided into two main sections: 'Folders' and 'Document Processing'. The 'Folders' section contains three text input fields, each with a browse button (three dots) to its right. The 'Document Processing' section contains a 'Pause' field with a numeric input and a unit label, and an 'XML Filename Format' dropdown menu. At the bottom of the window are three buttons: 'Save', 'Reload', and 'Exit'.

Section	Field Name	Value
Folders	Watch Folder:	c:\KTD\W\watchfolder001
	Archive Folder:	c:\KTD\W\archivefolder001
	Failure Folder:	c:\KTD\W\failurefolder001
Document Processing	Pause:	1200 ms
	XML Filename Format:	.xml

## Setting up Pinnacle DWI Configuration & Controller

- 1: Open DWI Controller
- 2: Watch the DWI Controller as documents arrive in the watchfolder001 from vFiler and you'll see them move to the repository and the archivefolder001 located at: C:\KTDWI.
- 3: Instruct users to check the failurefolder001 daily.



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### Installation Notes:

- 1: Ensure your Pinnacle config.ini "Cache" section is set to false:  
cacheEnabled=false
- 2: If you have upgraded or are upgrading from version 3.3.7 or earlier ensure you add the upload folder in both var folders in the c:\pdms directory.
- 3: Do not disable the "Default" document type in Pinnacle because this will cause documents coming from vFiler to error. For best results, create your Fieldset, Fields, Document Type and associate the Document Type to the Fieldset as instructed in this manual.
- 4: Tweak the Pause Time (increase the time) n the Pinnacle DWI Service Controller if running on slower machines.
- 5: If running large volumes, on the computer Pinnacle DWI is running set the Windows Application Event log to overwrite old events and optionally increase the size of the Application Event log (set to 512 KB by default).

To do this, open the Event Viewer, (under Administrative Tools in the Control Panel) and empty the **Application** log. Then right-click the **Application** log in the left pane, and select **Properties** from the context menu. Optionally increase the size, and select the **Overwrite events as needed** radio button. The Application log (as opposed to the Security and System logs) is not systems-critical, and the overwriting of old events should not cause precious data to be lost.