

# ONBASE

## DIRECTORY IMPORT PROCESSOR

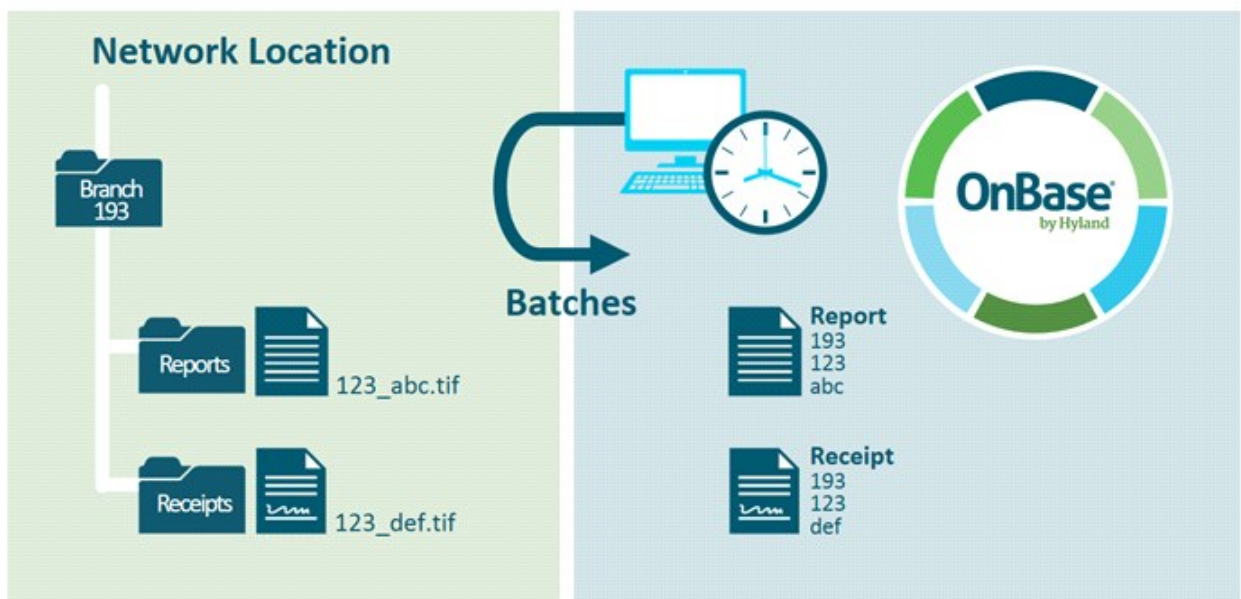
### SUMMARY

The Directory Import Processor allows OnBase users to import documents from any file directory structure. Valuable information contained within folder and file names is used to automatically classify and index documents upon import. This processor is commonly used to capture directory structures created by third-party systems, multi-function devices (MFDs) and external scanning sources, automating the import of files regularly output by other systems. Previously disparate documents are then contextually related, centrally managed and secured in the OnBase repository.

### BENEFITS

- **Automate the import and index of documents regularly output by other systems**, using values from folder and file names
- **Leverage investments made in MFDs** through automatic import of content captured by these devices
- **Minimize costs of conversion** from a legacy directory-based repository or a third-party capture system
- **Hardware-independent solution**, allowing high-volume capture regardless of device brand or source location

### DESIGN



The Directory Import Processor imports files from a network directory structure. It parses the folder hierarchy and file names into the Keywords for each Document Type found. Each Document Type can have a different file naming convention.

### APPLICATIONS

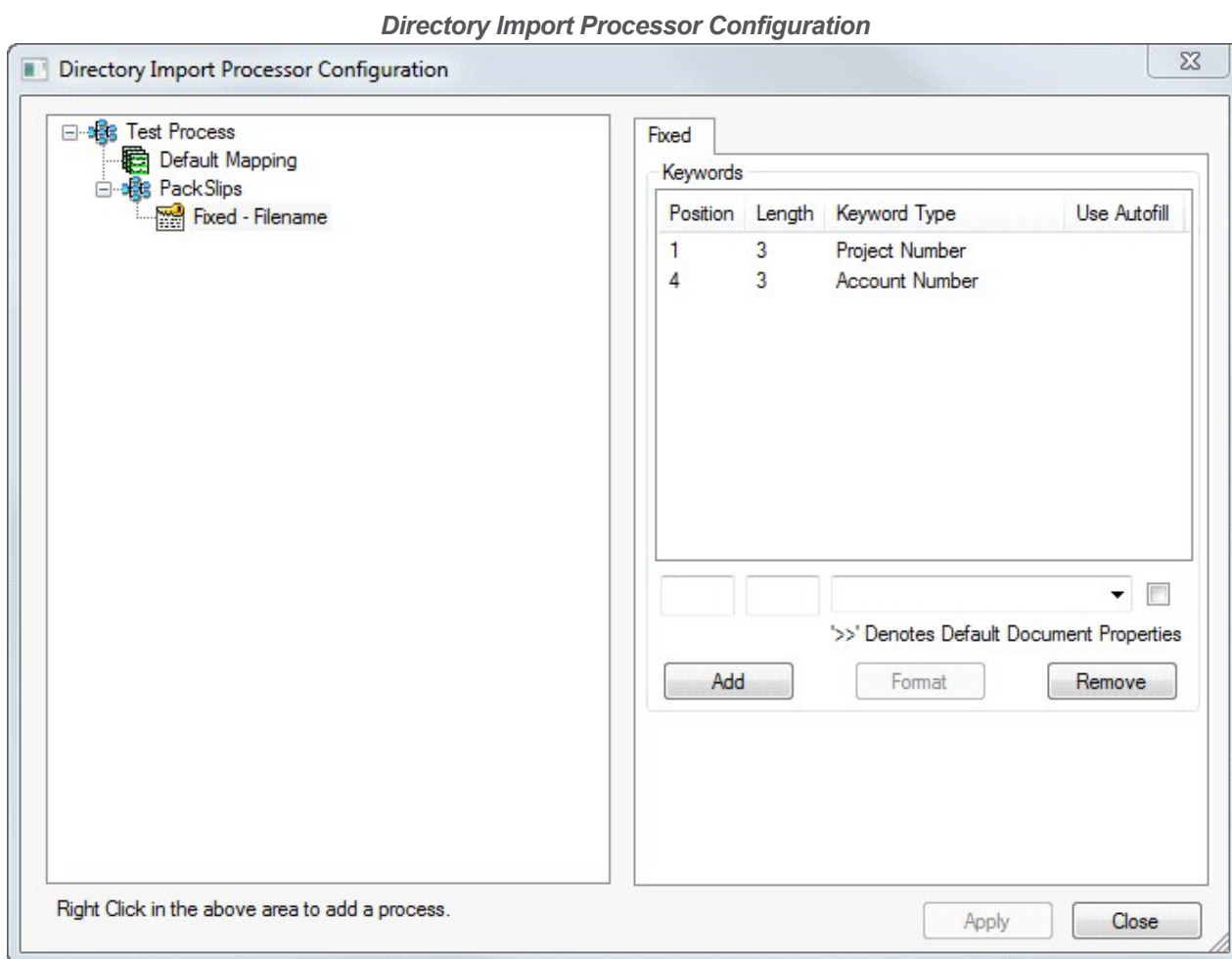
- **Multi-Function Devices:** Users enter information about the document using the MFD device panel. The document is then saved to a network location, following a specified naming convention for the file and folder structure. Every hour, these documents are automatically imported into OnBase using the information contained within the folder and file name to index the documents.

- **External Scanning Services:** A small organization sends paper documents to a service to be scanned. The scanning service names the file with the account number that appears on the document and places the document in a folder named for the type of document. Each night, the organization automatically imports these documents into OnBase, determining the Document Type by the folder name and the account keyword from the file name. An AutoFill Keyword Set is then applied to completely index the documents in an automated fashion.

## KEY FEATURES

- **Automatically import and index a variety of file types**, with values extracted from folder and file names
- **Expand AutoFill Keyword Sets upon import**, allowing documents to be fully indexed using limited information
- **Process runs on demand or automatically** using the OnBase Scheduler
- **Email notifications** alert administrators of errors, warnings, completed jobs and more
- **Create a single document per folder** converts multiple image files in a folder into a single, multi-page image in OnBase
- **Support for revisions** of documents already in OnBase
- **Variety of Root Directory locations**, including UNC paths and physical mapped drives

## INTERFACE



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