

Pinnacle DWI Service Release Notes



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About this Guide

The **Pinnacle™ DWI Service Release Notes** provides conceptual and procedural information around installing and using the alpha version of **Pinnacle Document Workflow Integration (DWI) Service**.

Typographic Conventions

| Typeface / or Symbol | Meaning | Example |
|-----------------------------|--|---|
| AaBbCc123 | The names of commands, files, and directories; on-screen computer output | cat /tmp/file |
| AaBbCc123 | What you type, contrasted with on-screen computer output | machine_name% su |
| <i>AaBbCc123</i> | Command-line placeholder: replace with a real name or value | To delete a file, type rm <i>filename</i> . |
| AaBbCc123 | Book titles, new words, or terms, or words to be emphasized. | Read Chapter 2 in Quick Start for Administrators . |

What is Pinnacle DWI Service?

Pinnacle Document Workflow Integration (DWI) Service is an application that provides imaging workflow integration to Pinnacle on the Windows platform.

Pinnacle DWI Service allows the upload of documents to the Pinnacle repository via a folder (the **watchfolder**, in the KTDWI folder) on your local file system. When uploading documents to this external folder using Pinnacle DWI Service, the document metadata is automatically extracted, and the metadata fields in Pinnacle are automatically populated during the document upload process.

How does Pinnacle DWI Service work?

This section provides a walk through overview of the full Pinnacle DWI Service process.

Process overview:

1. Install KT DWI Service using the Install Wizard.
2. You will receive a **KTDWI.xsd** file with your Pinnacle DWI Service application. The .xsd file is the Pinnacle XML schema that must be used to create the XML files used with Pinnacle DWI Service.

3. Create the XML files (using a third party application) that will accompany the documents you upload to Pinnacle with Pinnacle DWI Service. Ensure that these files follow the Pinnacle XML schema contained in the .xsd file you receive with Pinnacle DWI Service.
4. The Install procedure creates a parent folder, the **KTDWI** folder, on your local file system. This folder contains three subfolders - **watchfolder**, **archivefolder**, **failurefolder**.
5. The Install procedure also creates a menu item for KT DWI Service in the Pinnacle Tools menu, on the Windows **Start** menu.
6. To launch Pinnacle DWI Service after installing it, you need to manually start this service via the **Start** menu. To do this, click **Start - Pinnacle Tools - DWI Service - DWI Service Controller**. This opens the **KT DWI Service Control** window. Click the **Start** button on this window to launch DWI Service. You can close this window after starting the Service manually. This window displays the progress of KT DWI Service tasks. You can open this window via the **Start** menu at any time to view the progress of tasks. By default, KT DWI Service starts automatically after you have started it manually after installation.
7. The Pinnacle admin user now needs to log in to the Web interface to create document types (and associated fieldsets and fields) to use for documents that are uploaded via the **watchfolder** on the **C** drive with KT Service.
 - 7.1. Create a DWI document type
 - 7.2. Create Fieldsets (one or more) for this document type
 - 7.3. Create Fields (one or more) for the Fieldsets

Note: *There are currently no rules for naming the document type, fieldsets, and fields that you create in DMS Administration, specifically for Pinnacle DWI Service. We recommend the following best practice:*

- *Prefix the name of the document type, fieldsets, and fields you create with 'DWI'; for example: DWI Document Type, DWI Invoice details (fieldset), DWI Customer name (field). This will ensure that the metadata you have set up specifically for Pinnacle DWI Service is recognizable as such in the Metadata Configuration section in DMS Administration*
- *Use the same syntax that is used in the XML files - i.e follow capitalization, spelling etc.*

8. Upload a document to the **watchfolder** on the file system. The document must be added first, followed by the accompanying XML file. The XML file has the same file name as the document it describes, except for its extension (.xml).
9. Pinnacle DWI Service monitors the **watchfolder**. When a document is added to the **watchfolder**, KT DWI Service waits for the accompanying XML file. The XML file allows the automatic extraction of metadata from the document it accompanies. The XML file defines all the information about the uploaded document that KT DWI Service requires to effectively and securely store and categorize the document in the Pinnacle repository - for example, the document type, fieldsets, fields, permissions structure, storage location.
10. The document is added to the correct storage location in the Pinnacle repository. The document's **Document Details** page in the Web interface displays the metadata extracted during the upload process.
11. When a document is successfully uploaded to Pinnacle, a copy of this document and the accompanying XML file is moved to the **archivefolder**. Any document that does not upload successfully is moved to the **failurefolder**, along with its accompanying XML file. The Admin user manages the content of these folders - i.e. by cleaning out the content of the **archivefolder**, or to discover the reason for upload failures and other errors that have caused document to move to the **failurefolder**.

Installing Pinnacle DWI Service

KT DWI Service is installed to the **C** drive on the local file system, using a Windows Installer Wizard.

During installation, the Installer creates a folder on the file system, and a **DWIService** menu item on the Windows **Start** menu.

⊕ 📁 KTIWI
Figure: KTDWI folder on the C drive



Figure: KT DWI Service on the Start menu

Important

The **DWI Service** menu on the **Start** menu currently displays three utilities: **DWI Service Client**, **DWI Service Configuration**, and **DWI Service Controller**. DWI Service Client and DWI Service Configuration are reserved for future development. This Guide discusses only **DWI Service Controller**.

Inside the KTDWI Folder

The KTDWI folder on the C drive has three sub folders:

- an archive folder
- a failure folder
- a watch folder

📁 KTIWI
📁 archivefolder001
📁 failurefolder001
📁 watchfolder001

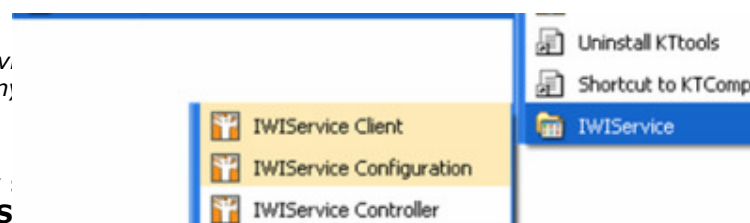
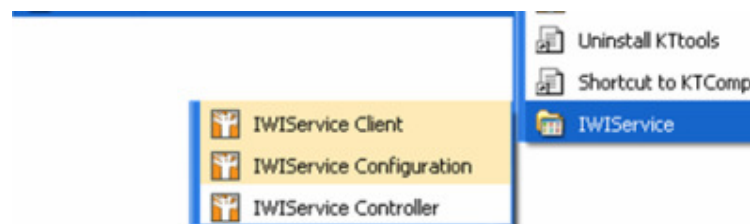
Starting Pinnacle DWI Service

This procedure starts Pinnacle DWI Service.

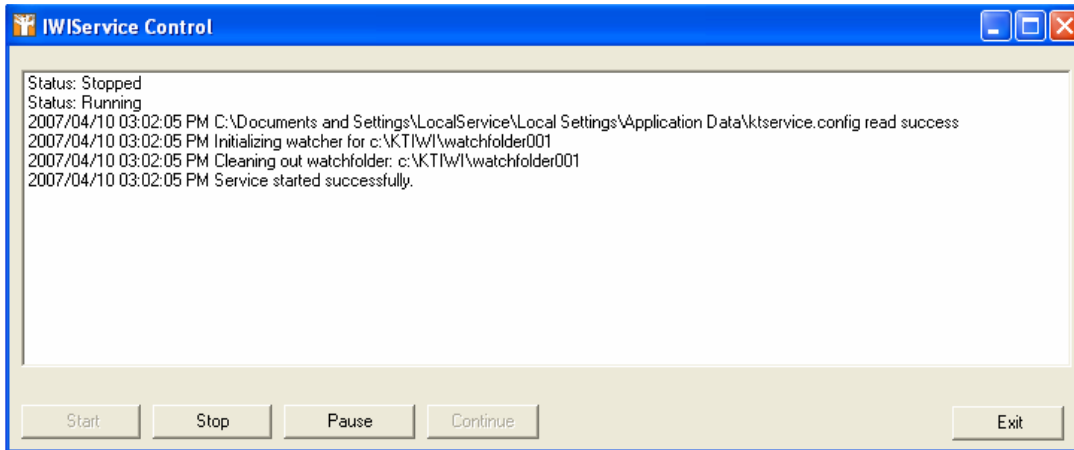
Note: After performing this initial Start procedure, KT DWI Serv. this window to monitor the status of KT DWI Service tasks at any

Perform the following steps:

1. After installing KT DWI Service, you need to manually :
Click **Start - Pinnacle Tools - DWI Service - DWI S**



2. This opens the KT DWI Service Control window. Clicking the **Start** button on this window launches DWI Service and displays the status of all initialization tasks.

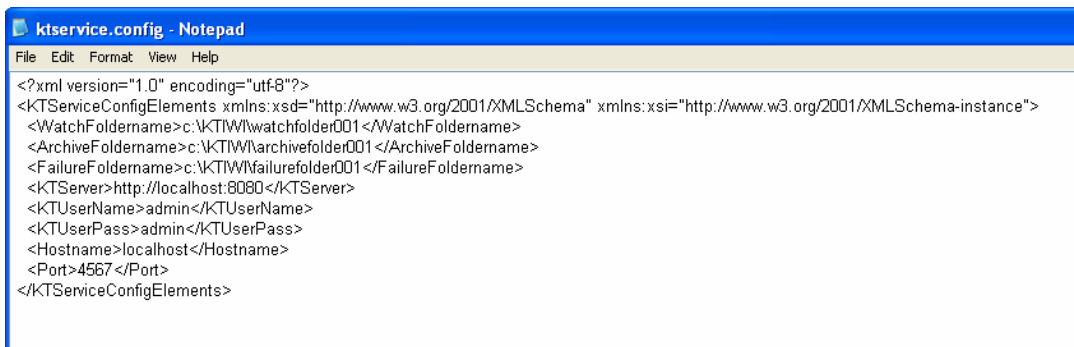


Pinnacle DWI Service Config File

Edit the **kt-service.config** file to change the following settings:

- move any of the sub folders in the KTDWI parent folder, to an alternate location (e.g. move the watchfolder, the archivefolder, or the failurefolder out of the KTDWI folder)
- specify the Pinnacle server
- change the username and password of the authorized user for uploading to or working with the KTDWI folder

Note: Find this file in C:\Documents and Settings\LocalService\Local Settings\Application Data



XML Schema

Each XML file that is added to the watchfolder must follow the Pinnacle XML Schema.

```
Microsoft Development Environment [design] - KTIWI.xsd
File Edit View Debug Schema Table Tools Window Help
a-b A+
KTIWLSsd
<?xml version="1.0" encoding="utf-8" ?>
<xs:schema id="IWI" targetNamespace="http://schemas.knowledgetree.com/KTIWI.xsd" xmlns:mstns="http://schemas.knowledgetree.com/KTIWI.xsd" xmlns:xs="http://www.w3.org/2001/XMLSchema"
  attributeFormDefault="qualified" elementFormDefault="qualified" version="3.4.2.1">
  <xs:element name="DocumentDetails" minOccurs="1" maxOccurs="1">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="Filename" type="xs:string" minOccurs="1" maxOccurs="1" />
        <xs:element name="Title" default="[Same as Filename]" type="xs:string" minOccurs="0" maxOccurs="1" />
        <xs:element name="Description" default="[Same as Title]" type="xs:string" minOccurs="0" maxOccurs="1" />
        <xs:element name="Type" default="Default" type="xs:string" minOccurs="0" maxOccurs="1" />
      </xs:sequence>
    </xs:complexType>
  </xs:element>
  <xs:element name="StorageDetails" minOccurs="1" maxOccurs="1">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="KTPath" type="xs:string" minOccurs="1" maxOccurs="1" />
        <xs:element name="Type" default="Default" type="xs:string" minOccurs="0" maxOccurs="1" />
        <xs:element name="Overwrite" default="false" type="xs:string" minOccurs="0" maxOccurs="1" />
        <xs:element name="CreatePath" default="true" type="xs:string" minOccurs="0" maxOccurs="1" />
      </xs:sequence>
    </xs:complexType>
  </xs:element>
  <xs:element name="PermissionsDetails" minOccurs="0" maxOccurs="1">
    <xs:complexType>
      <xs:sequence>
        <xs:element name="User" minOccurs="0" maxOccurs="1">
          <xs:complexType>
            <xs:sequence>
              <xs:element name="Name" default="admin" type="xs:string" minOccurs="1" maxOccurs="1" />
              <xs:element name="Type" default="default" type="xs:string" minOccurs="1" maxOccurs="1" />
            </xs:sequence>
          </xs:complexType>
        </xs:element>
      </xs:sequence>
    </xs:complexType>
  </xs:element>
</xs:schema>
```