File*Catalyst* HotFolder

Quickstart

Contents

1 Installation 2
1.1 Verify System Environment 2
1.2 Perform Installation 2
1.2.1 Windows 2
1.2.2 Mac OSX 2
1.2.3 Linux 2
1.3 Running as a Service 3
2 First Run Wizard 4
3 Site Manager 7
3.1 Add a New Site 7
3.2 Detect Bandwidth for Site 11
4 Define a HotFolder 12
5 Bandwidth 15
5.1 Bandwidth Scheduler 15
6 Task Scheduler 17
6.1 Add a New Task 17
6.2 Transfer files 18
6.3 Monitor Activity 19
6.4 Edit a Task 20
6.4.1 Overview of Edit Task Options 23
7 Remote Administration 24
7.1 Enable Features 25
8 Next Steps 26
8.1 Enable Incremental 26
8.2 Widen transfer interval 26
8.3 Read Documentation 26
8.4 Complete the Demo Scenario 26
9 Support 27

Introduction

FileCatalyst HotFolder is the most commonly used of the FileCatalyst clients. HotFolder is a highly configurable and feature-rich desktop application that combines the acceleration and optimization of the FileCatalyst core technology, along with automation, monitoring and bandwidth management. File transfers become as easy as saving to a folder that is already part of an existing workflow.

This guide picks up where the FileCatalyst Server Quickstart leaves off; therefore it is assumed that a FileCatalyst Server is already installed. By the end of the HotFolder Quickstart, you will be able to:

1. Install HotFolder on any supported platform
2. Create a connection to the FileCatalyst Server
3. Define a directory to be used as a HotFolder
4. Schedule bandwidth usage
5. Execute an upload task
6. View transfer activity
7. Remotely administer your HotFolder

For the purpose of visualization, this guide invokes a real-world scenario, only one of many possible ways to use HotFolder:

> An example user's HotFolder is configured to upload data to a server at a scheduled interval, only sending files that are new or that have changed. Several other HotFolders monitor the same server and automatically download new content. The example user only needs to place a file in their defined HotFolder, and it is distributed to the rest automatically.

Let's set up the sending user's HotFolder, after which you will understand the fundamentals for creating the receiving HotFolders.

1 Installation

FileCatalyst HotFolder is most commonly run as a desktop GUI application. The following instructions assume that a windowed environment is being used for each operating system.

For Linux and other Unix-like systems, a basic understanding of using the command line is assumed.

1.1 Verify System Environment

FileCatalyst HotFolder contains a 64-bit OpenJDK JRE 8 in order to run the application. Please ensure that you are running on a 64-bit system before installation.

1.2 Perform Installation

Note: if you have another instance of FileCatalyst HotFolder running, you must exit before continuing with this guide. Be particularly careful to see if it has been started as a service, and stop it accordingly.

1.2.1 Windows

1. Download the HotFolder installer (*install_fc_hotfolder.exe*) to your desktop
2. Double-click installer icon to launch install wizard (some versions of Windows will require you to trust the application)
3. Step through the wizard to choose installation directory and shortcut options
4. At end of wizard, click “Finish”
5. Locate and launch the application from the Start Menu

1.2.2 Mac OSX

1. Download HotFolder installer for Mac (*FileCatalyst HotFolder.pkg*) and save it to Desktop
2. Double-click the package to begin installation
3. Step through the installation wizard:
    a. When asked how to install, select "Install for all users of this computer"
    b. Choose default installation location to place FileCatalyst HotFolder into the Applications folder
4. At end of wizard, click “Finish”
5. Locate and launch the application from the Applications folder

1.2.3 Linux

1. Create directory at `/opt/utechsoft/hotfolder`
2. Download tarball (*fc_hotfolder.tar.gz*) to this directory
3. Use GUI-based archive tool to unpack the tarball, or open a terminal and enter with the following commands:

```
> cd /opt/utechsoft/hotfolder
> gunzip fc_hotfolder.tar.gz
> tar -xvf fc_hotfolder.tar
```

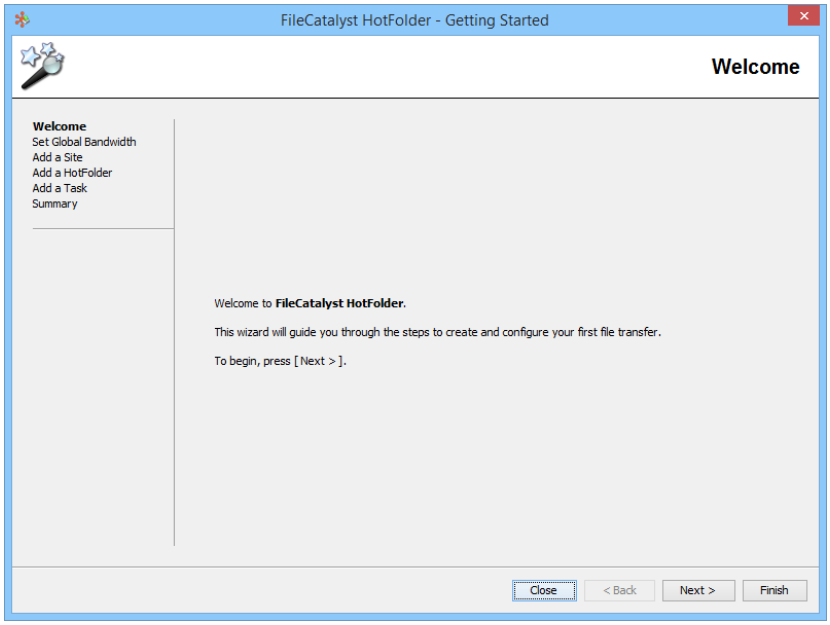
4. With the tarball unpacked, you will now have access to the README file. Open this file and continue following the instructions in order to complete installation
5. Assuming installation is complete and you are in the HotFolder directory, enter the command `./fc_hotfolder.sh` to start the application.

1.3 Running as a Service

FileCatalyst HotFolder is most effective when run as a service. As a service, the application will continue with automated tasks after the machine has restarted for any reason. After completing the "Quickstart" document you are currently reading, you should consider referring to the main documentation. The chapter "Running at Startup" describes the procedure to run the application as a service for your given platform.

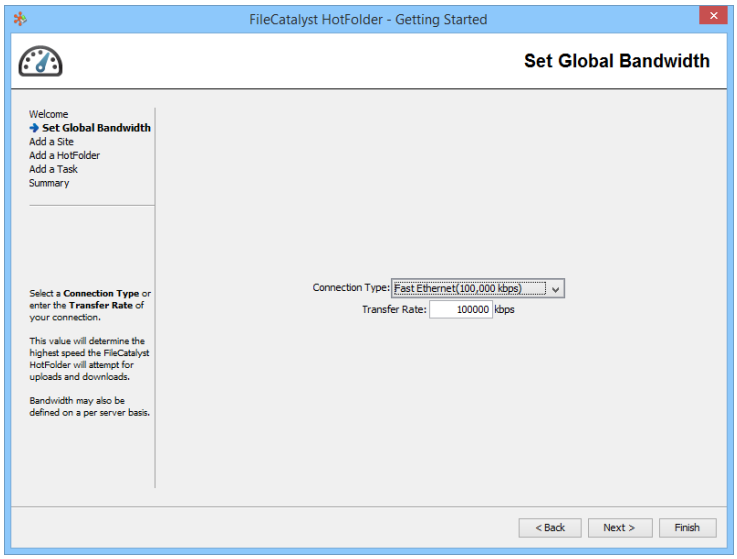
2 First Run Wizard

After installation of the FileCatalyst HotFolder , upon first execution, you will be presented with the First Run Wizard. This wizard will take you through initial steps to set up your bandwidth connection, add a site and a HotFolder and configure a task.



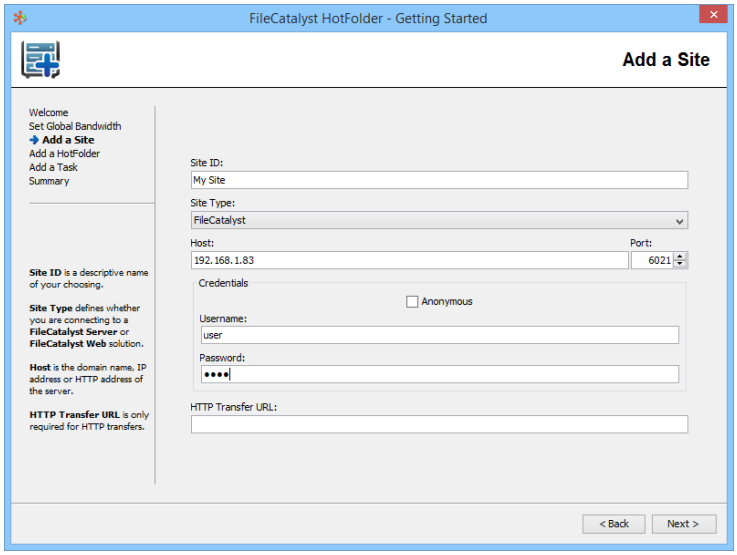
1

A welcome message advises that a first run wizard has been launched. Click the "Next" button to continue.



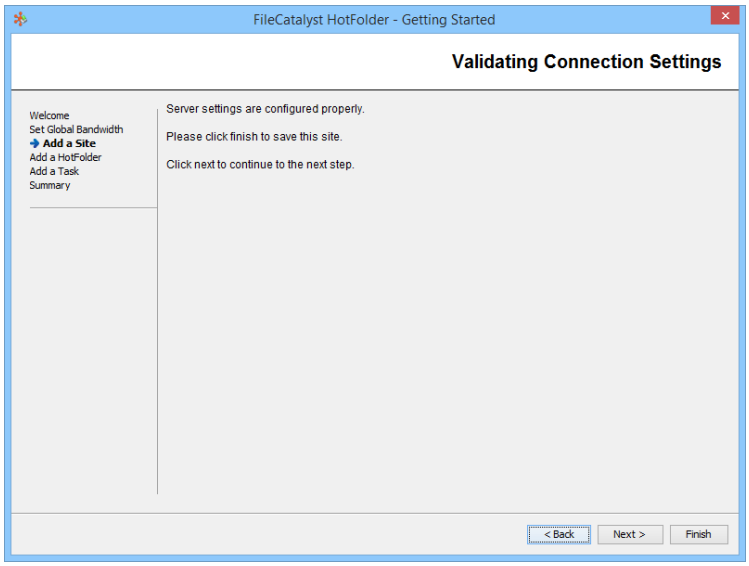
2

If known, select the expected speed of the data connection for this machine. Otherwise, keep as "unknown".



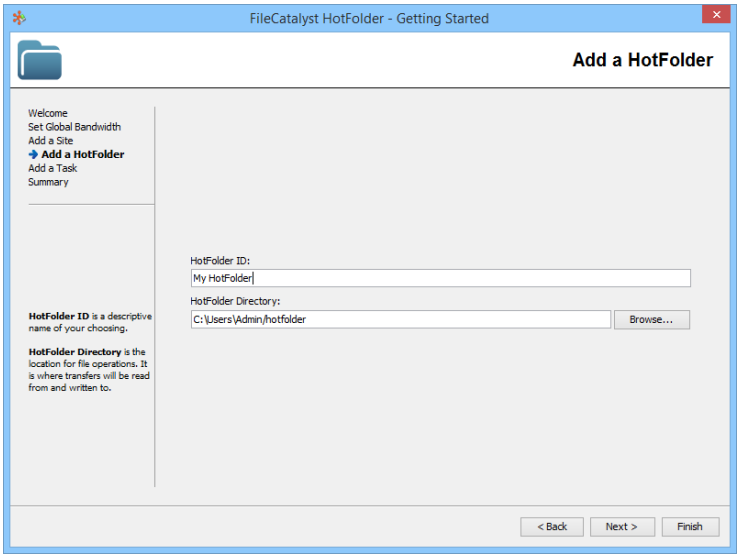
3

A Site is the server your FileCatalyst HotFolder connects to. You will be able to test these settings after the Wizard completes



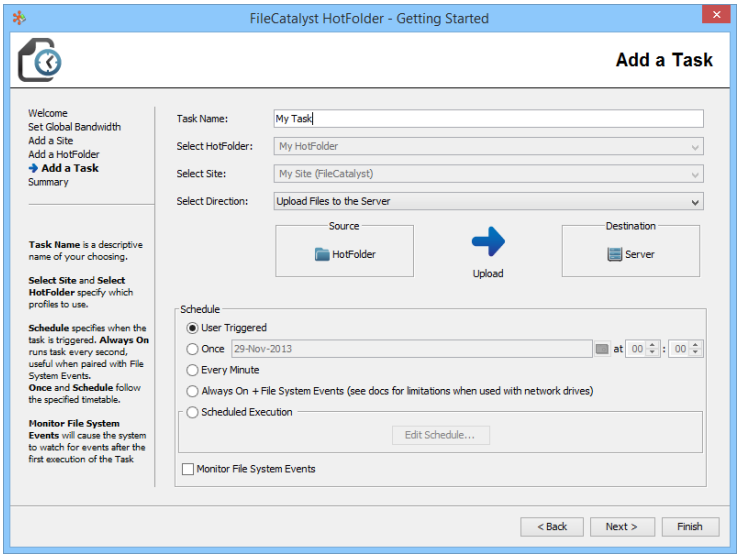
4

If you have entered valid site information, a confirmation will appear and you may proceed. Otherwise you must go "Back".



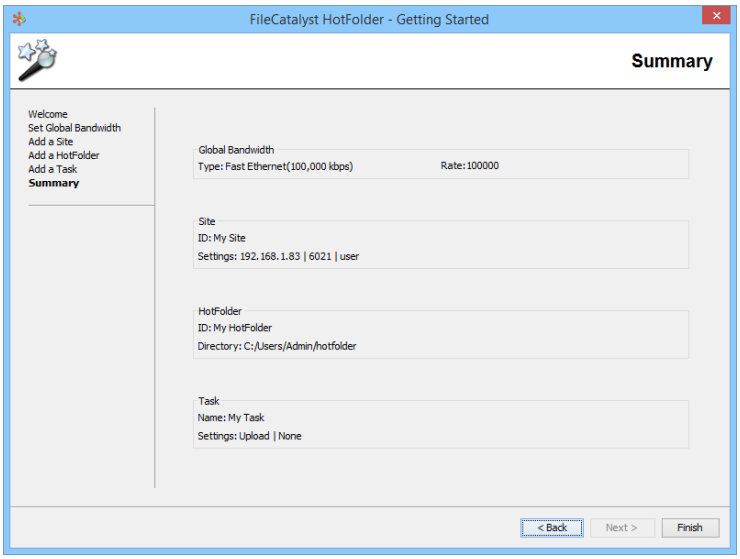
5

The HotFolder is the location where your data will come from or synch to. Clicking Next will create the directory.



6

Configure the task for upload or download, as well as scheduling and behaviour options.

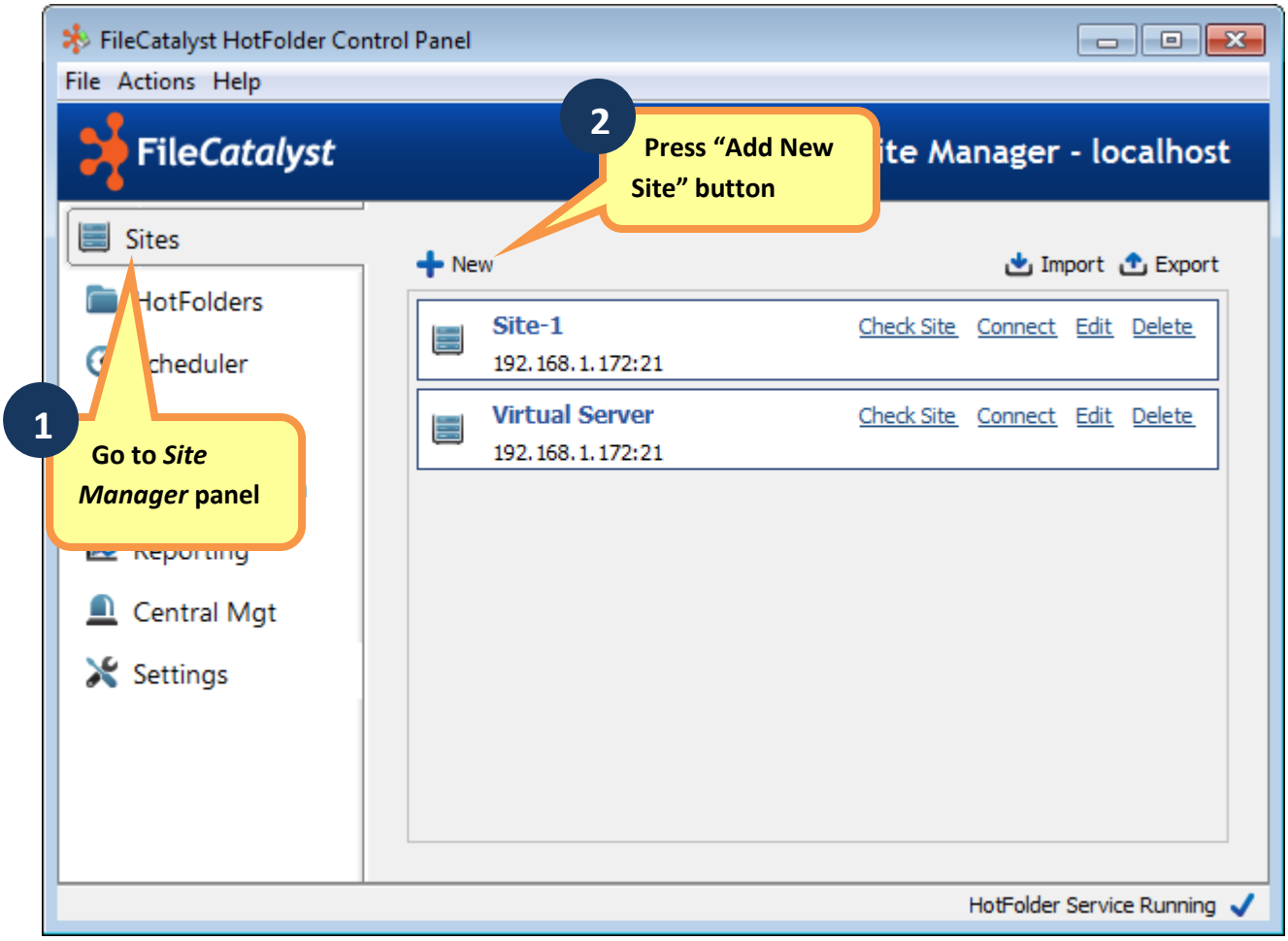


7

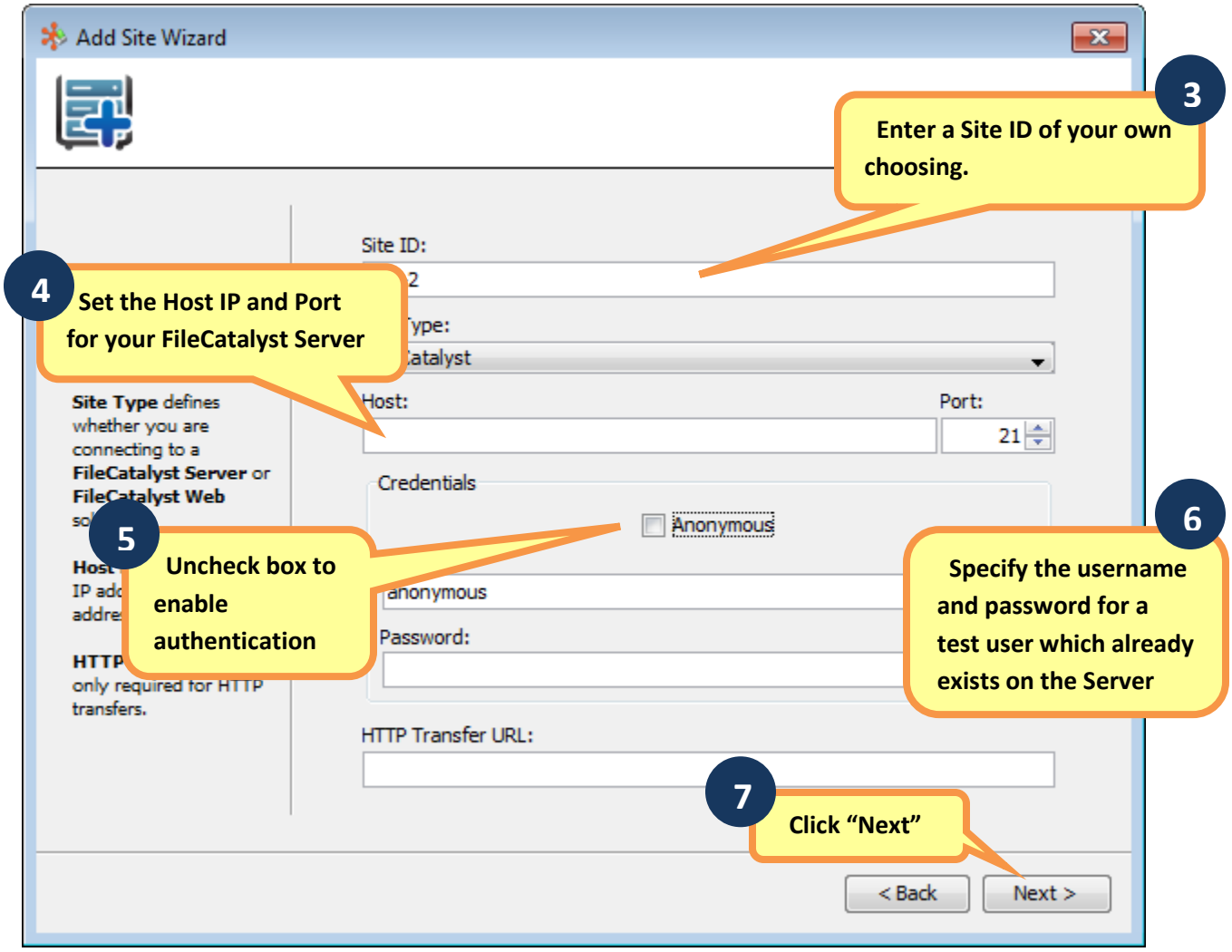
When completed you are presented with the summary. Click Finish when satisfied with the settings.

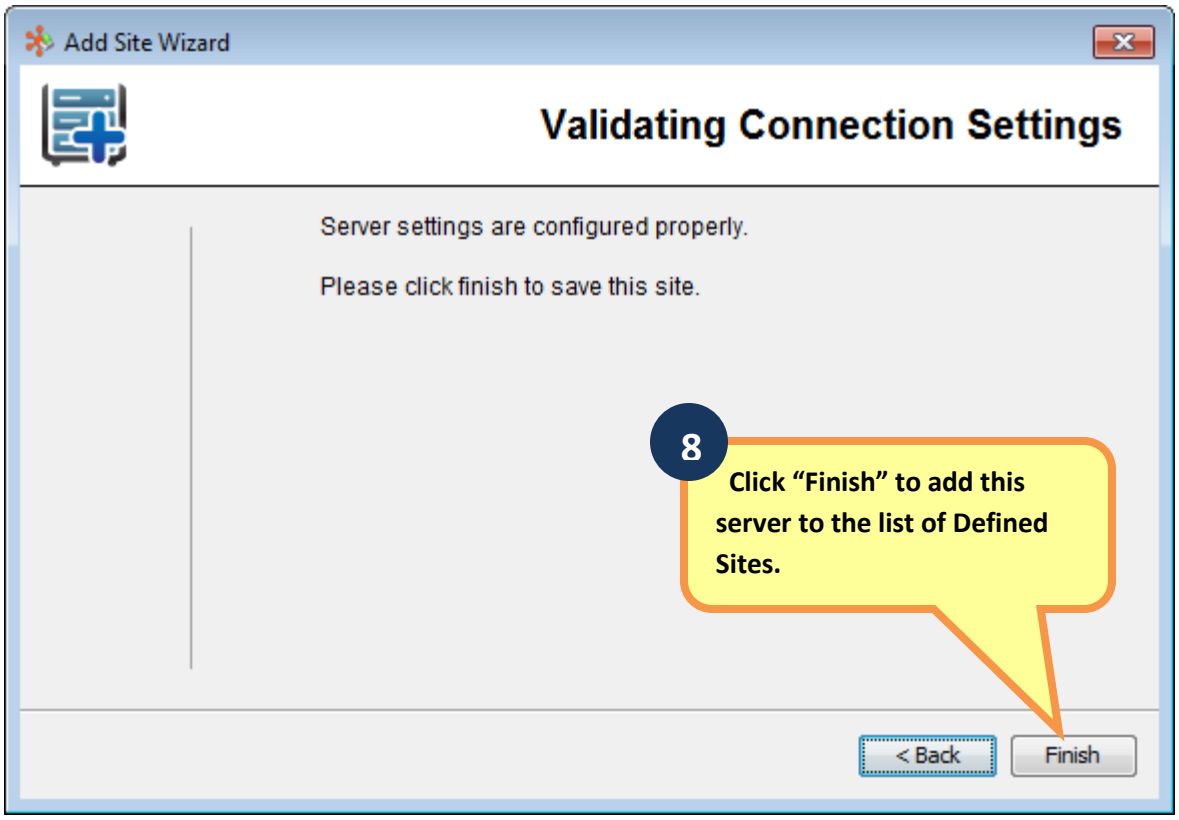
3 Site Manager

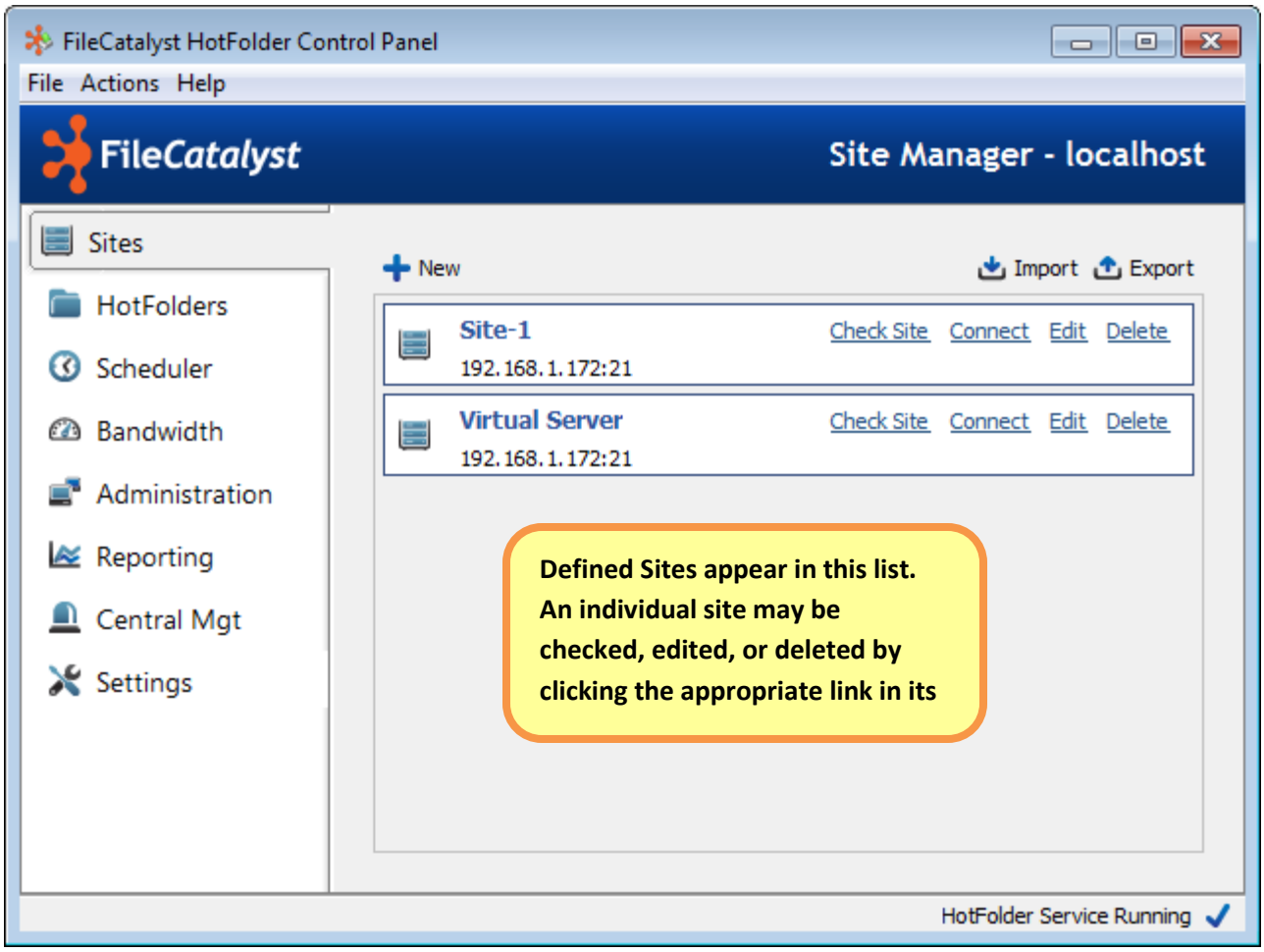
3.1 Add a New Site



The "Add New Site" Wizard will open in another window. Click "Next" on the introduction page to be brought to the Site Settings page:

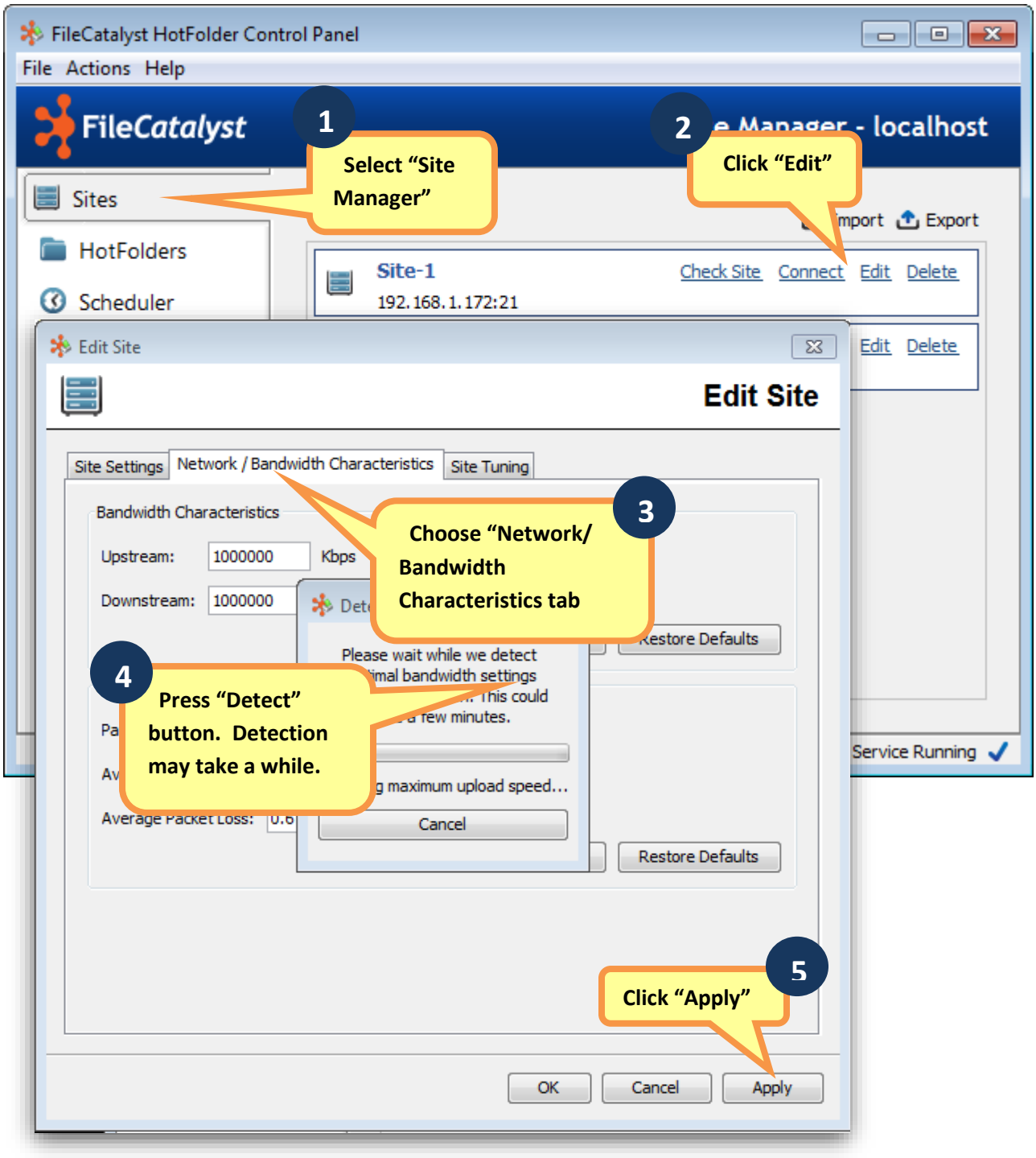



Add Site Wizard
Validating Connection Settings
Server settings are configured properly.
Please click finish to save this site.
8
Click “Finish” to add this server to the list of Defined Sites.
< Back
Finish


FileCatalyst HotFolder Control Panel
File Actions Help
FileCatalyst
Site Manager - localhost
Sites
HotFolders
Scheduler
Bandwidth
Administration
Reporting
Central Mgt
Settings
New
Import
Export
Site-1
192.168.1.172:21
Check Site
Connect
Edit
Delete
Virtual Server
192.168.1.172:21
Check Site
Connect
Edit
Delete
Defined Sites appear in this list. An individual site may be checked, edited, or deleted by clicking the appropriate link in its
HotFolder Service Running

3.2 Detect Bandwidth for Site

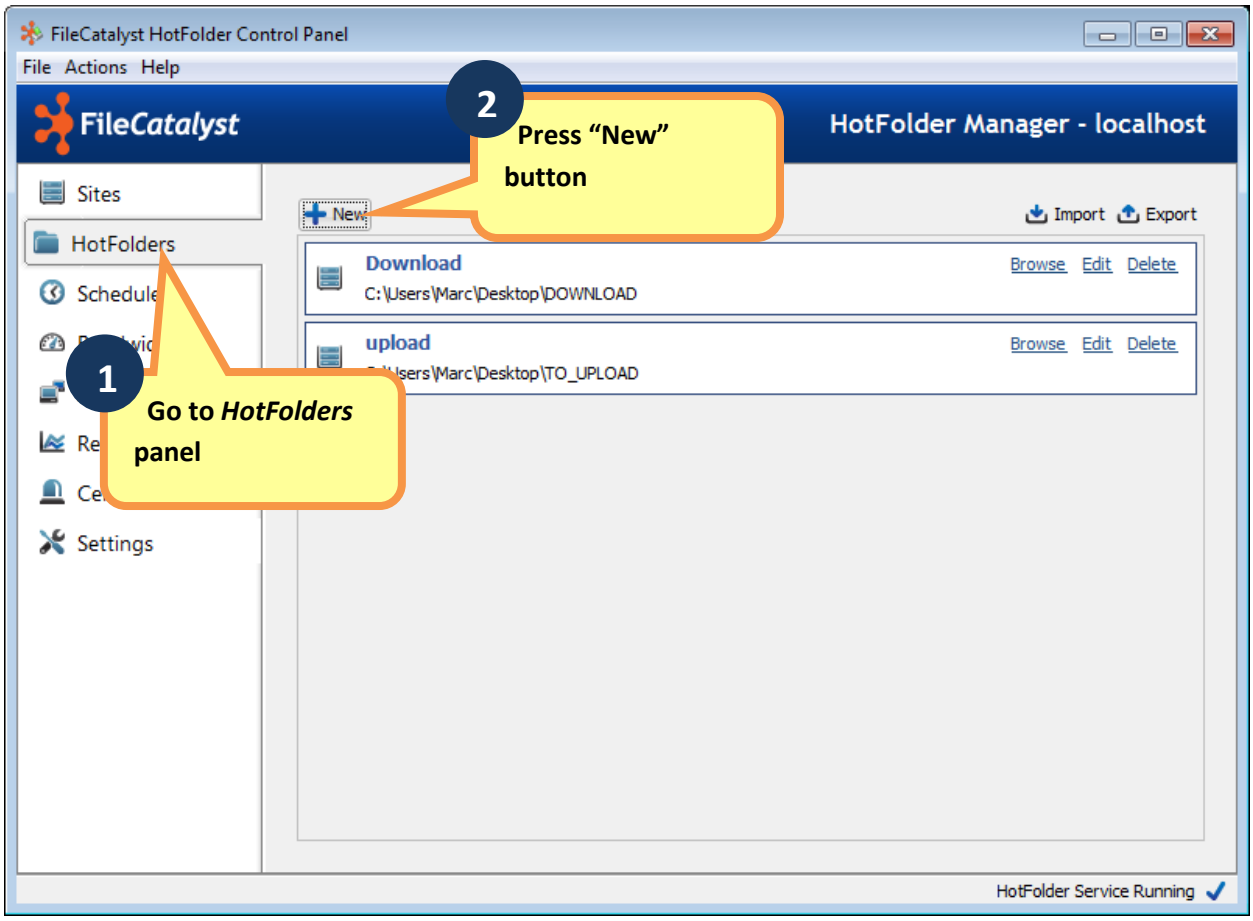
You need not detect bandwidth if you are confident that your settings in Bandwidth Scheduler (**section 4** of this document) will regulate your connection. However, if you are connecting to a site with unknown bandwidth characteristics, you may want to auto-detect.



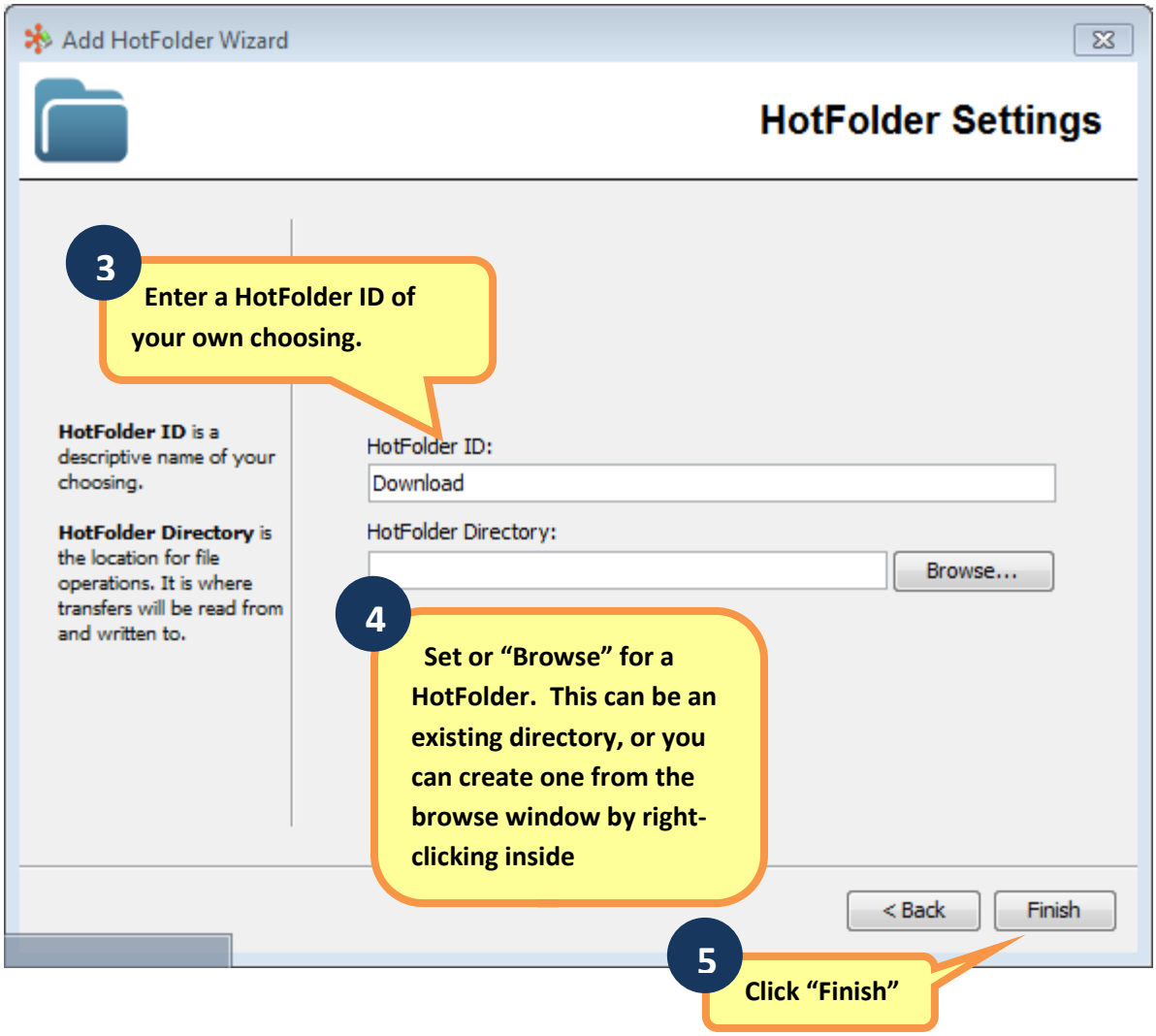
4 Define a HotFolder

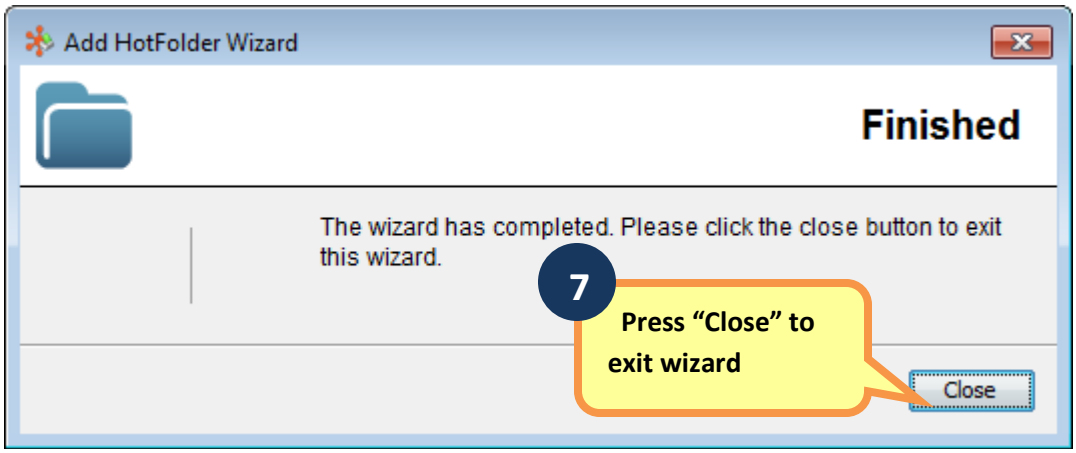
A "HotFolder" is simply any directory the user wishes to use as the source or destination for uploads and/or downloads. At least one HotFolder must be defined before a task can be created.

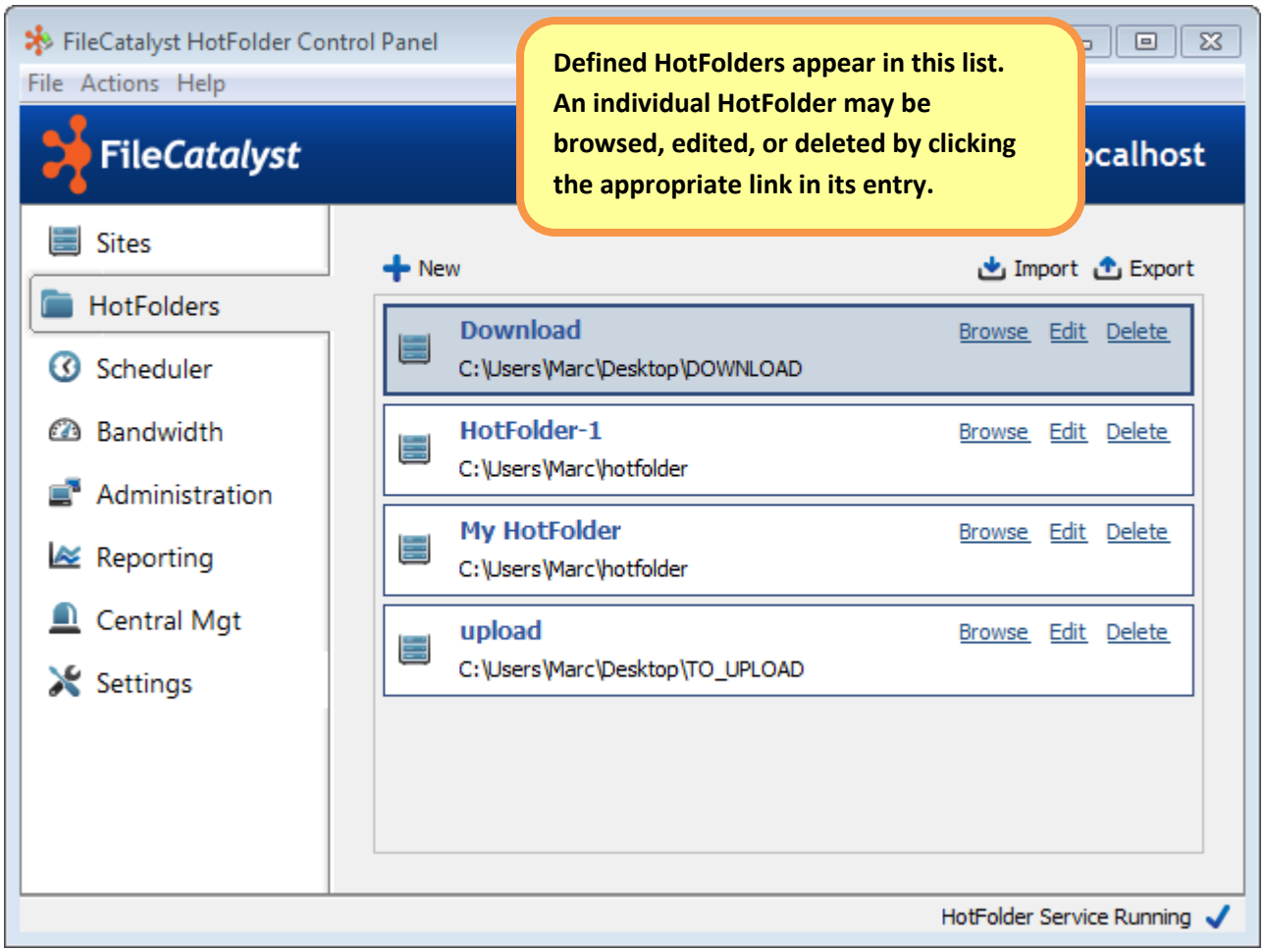
You may find it helpful to create a directory in advance, or identify an existing folder you wish to use for testing. You may also create a new directory from within the application itself.



The "New" wizard will launch. Click "Next" on the introduction page to be brought to the settings page:


Add HotFolder Wizard
HotFolder Settings
3
Enter a HotFolder ID of your own choosing.
HotFolder ID is a descriptive name of your choosing.
HotFolder Directory is the location for file operations. It is where transfers will be read from and written to.
HotFolder ID:
Download
HotFolder Directory:
Browse...
4
Set or "Browse" for a HotFolder. This can be an existing directory, or you can create one from the browse window by right-clicking inside
< Back
Finish
5
Click "Finish"





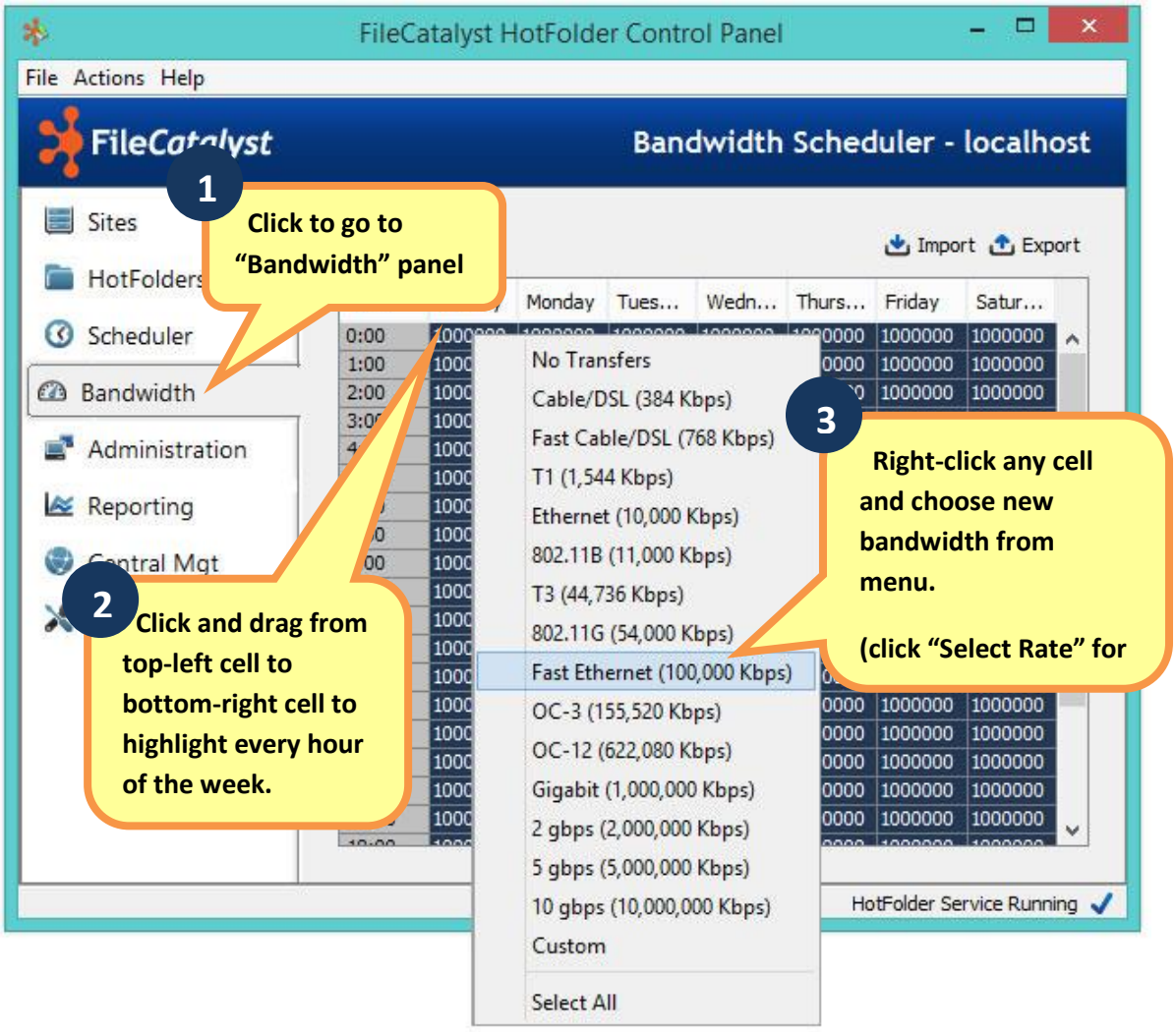
Adding a directory to the Defined HotFolders list does not modify it in any way. Saving or modifying files in the directory continues as usual and existing workflow does not need to change. By defining a HotFolder, the user is simply showing the application where to find the files for transfer.

5 Bandwidth

Although FileCatalyst Server is able to impose its own bandwidth limitations on users, the HotFolder client application should also have its bandwidth usage set. By default, HotFolder uses 1 gigabit (1000000b).

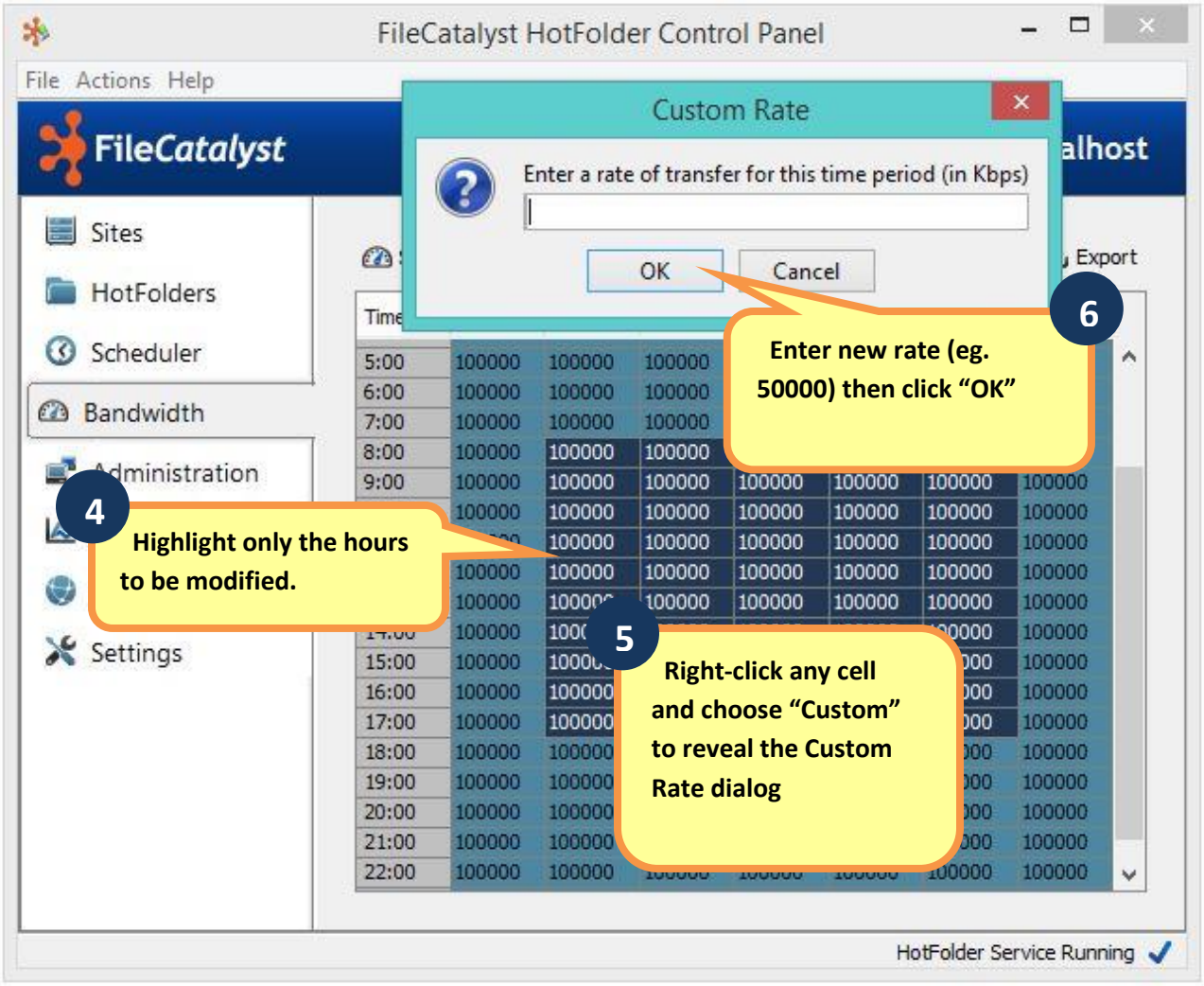
5.1 Bandwidth Scheduler

The example user has far higher available bandwidth, and would also like to schedule lower usage during the workday. Let's start by changing the bandwidth for all time slots:



Once this step is completed, HotFolder will be set to always attempt to send at the selected rate (in the example, user will select Fast Ethernet or 100,000 Kbps).

However, there may be times of the day during which lesser or greater bandwidth usage is desirable. Our user only wishes to devote 50,000 Kbps to HotFolder during standard business hours:

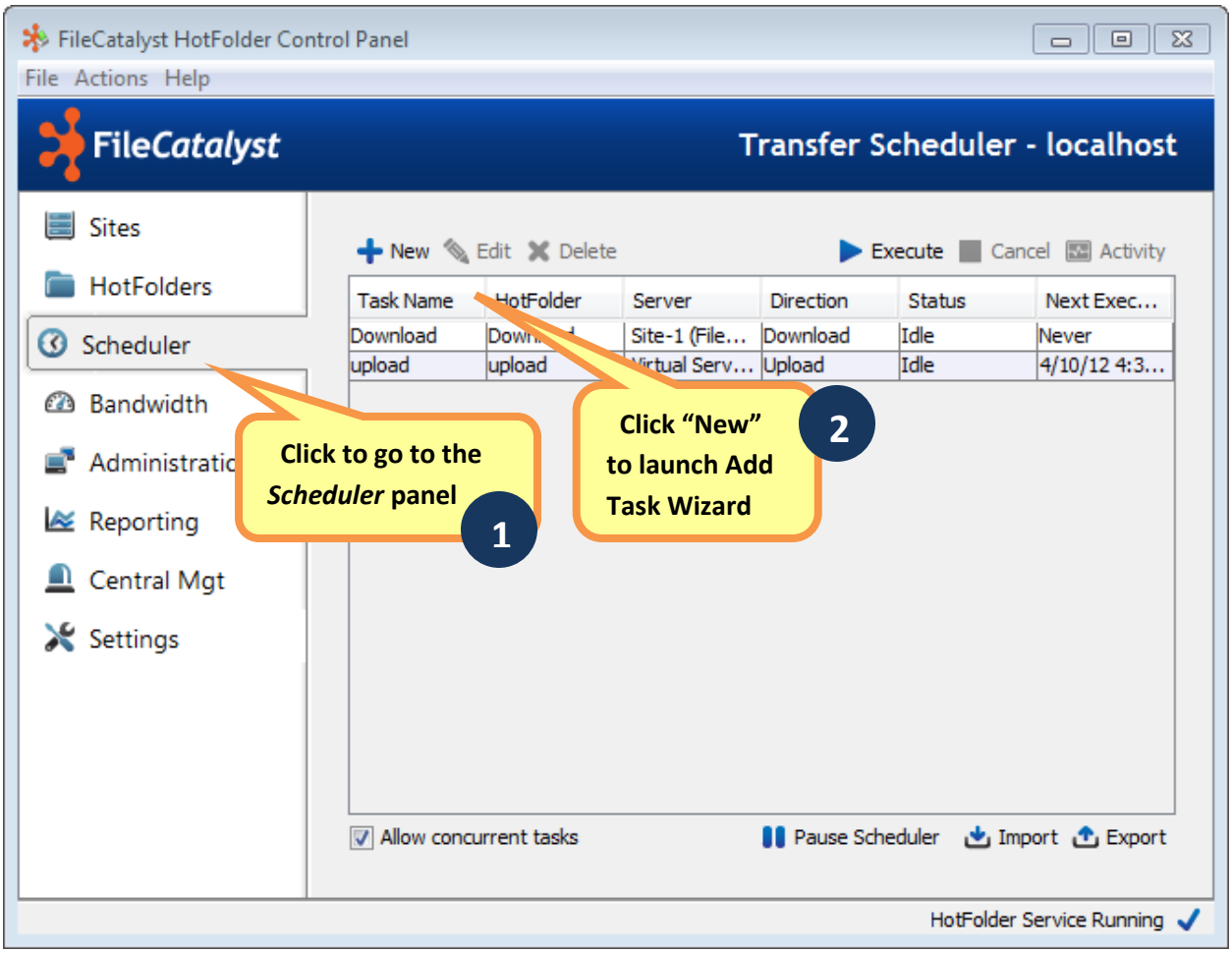


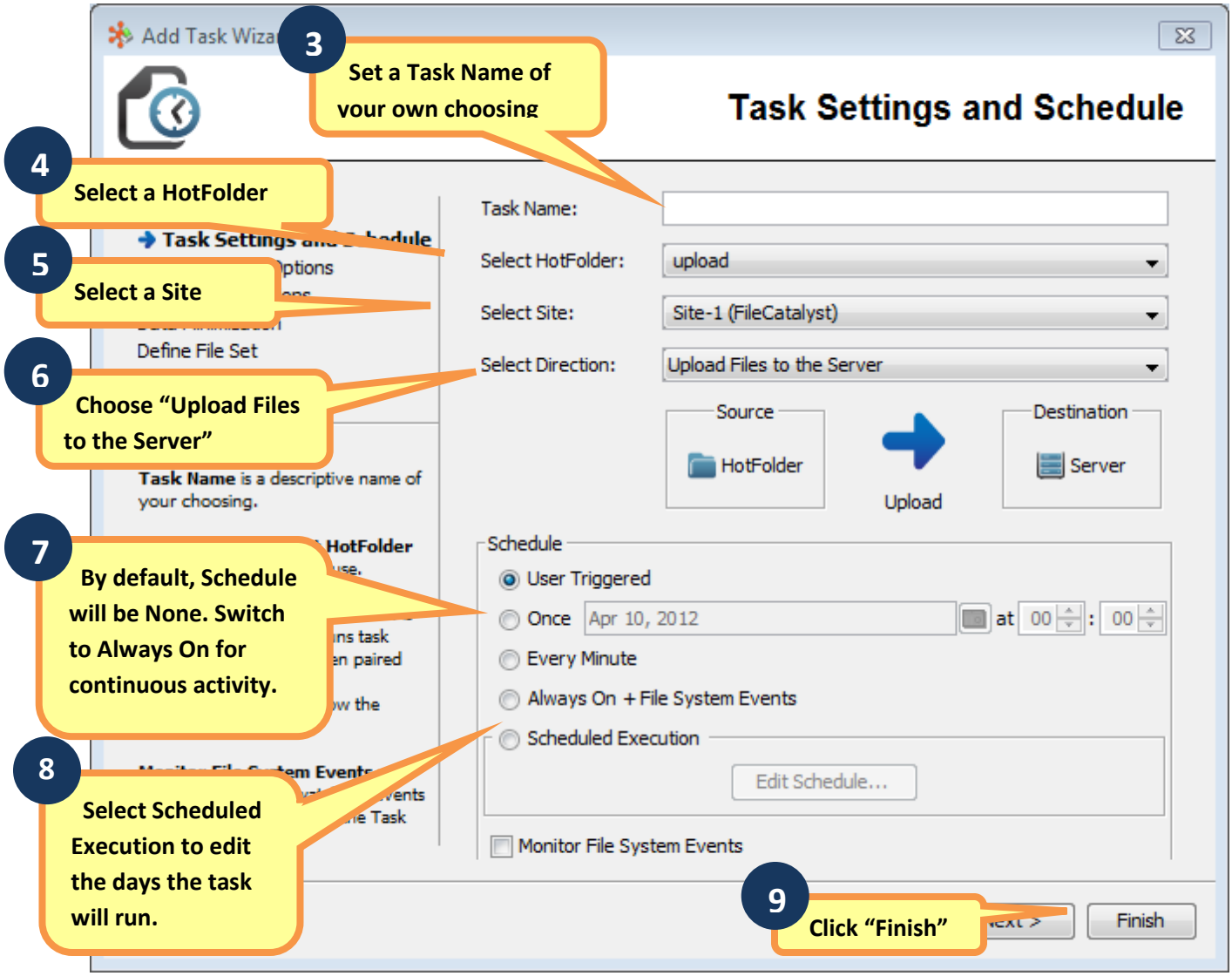
Now HotFolder will attempt to use 50,000 Kbps from 8:00 to 17:00; outside of these hours it will attempt to use 100,000 Kbps.

6 Task Scheduler

From the Scheduler pane, you may *Add* new tasks, *Edit* or *Delete* existing tasks, *Execute* or *Cancel* tasks on-demand (overriding the scheduled intervals), and monitor a task's *Activity*.

6.1 Add a New Task





With the settings seen above, the task will attempt to upload files from the HotFolder to the Server, once every minute, during the days you define.

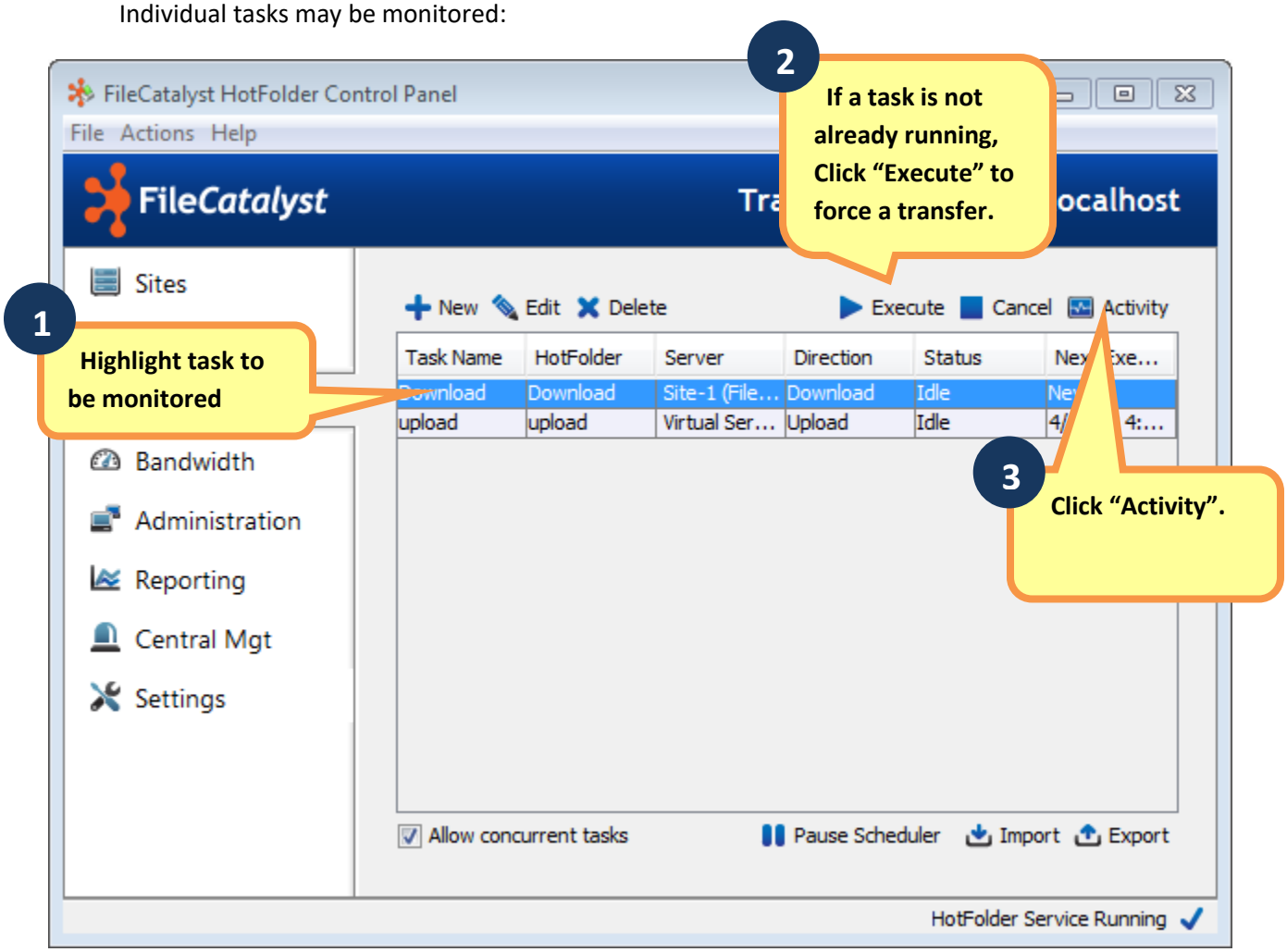
Note: *Because the task is set to run every second, there will be near-continuous transfer activity. This may be desirable in some cases, but more often the user will enable "Incremental" transfer options (described in the user guide) which prevent the sending of files that have not changed.*

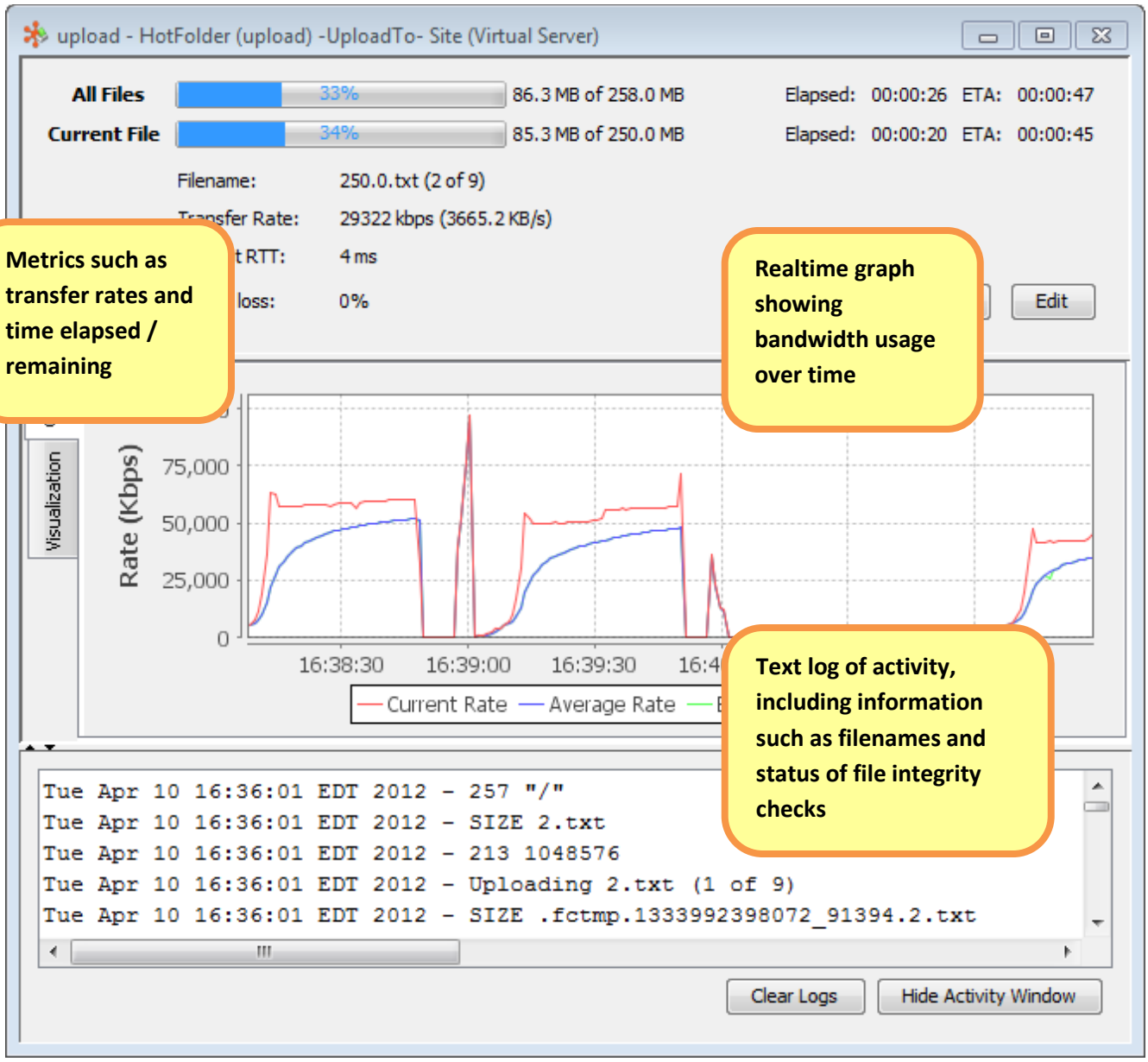
6.2 Transfer files

Transfers are now enabled and will begin automatically. If you have selected or created an empty directory to be your HotFolder, now is the time to drag, save, or copy some test files to this folder. If you have chosen a directory which already contains files, no further action is required. Within one second, you will see transfer activity in the Status column of the Scheduler pane.

6.3 Monitor Activity

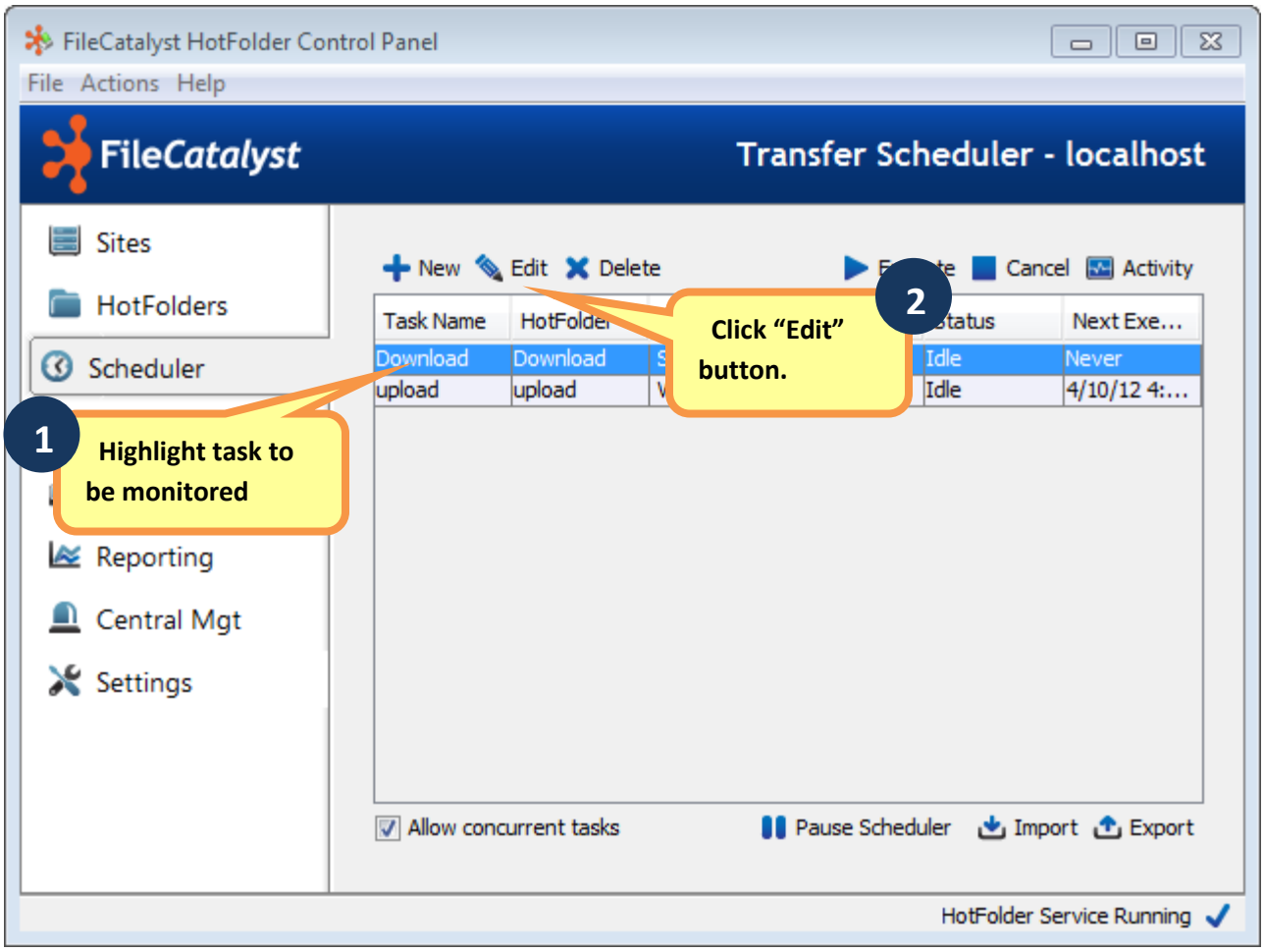
Individual tasks may be monitored:

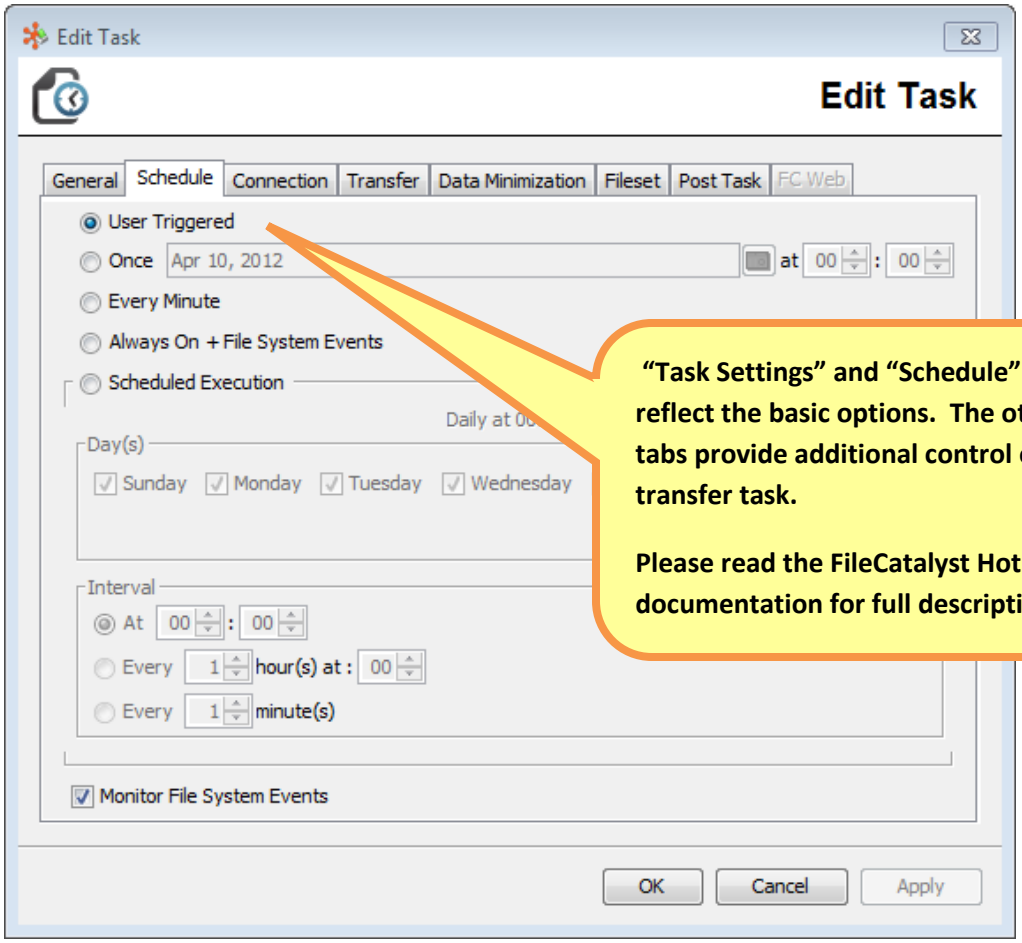




6.4 Edit a Task

Most of HotFolder's advanced features are accessed by editing a scheduled task:


FileCatalyst HotFolder Control Panel
File Actions Help
FileCatalyst
Transfer Scheduler - localhost
Sites
HotFolders
Scheduler
Reporting
Central Mgt
Settings
New
Edit
Delete
Cancel
Activity
Task Name
HotFolder
Status
Next Exe...
Download
Download
Idle
Never
upload
upload
Idle
4/10/12 4:...
1
Highlight task to be monitored
2
Click "Edit" button.
Allow concurrent tasks
Pause Scheduler
Import
Export
HotFolder Service Running



"Task Settings" and "Schedule" tabs reflect the basic options. The other tabs provide additional control over the transfer task.

Please read the FileCatalyst HotFolder documentation for full descriptions.

6.4.1 Overview of Edit Task Options

Connection—set functions such as Protocol, Start Rate, Auto Resume and Progressive Transfer

Transfer—set File Verification, Priority and auto-start Transfer Activity monitor

Data Minimization—Enable Incremental transfers, Enable and adjust the level of Compression and file exclusions for compression.

Fileset—set a remote folder for this transfer, File Filter to exclude or include file types and Transfer Cache settings

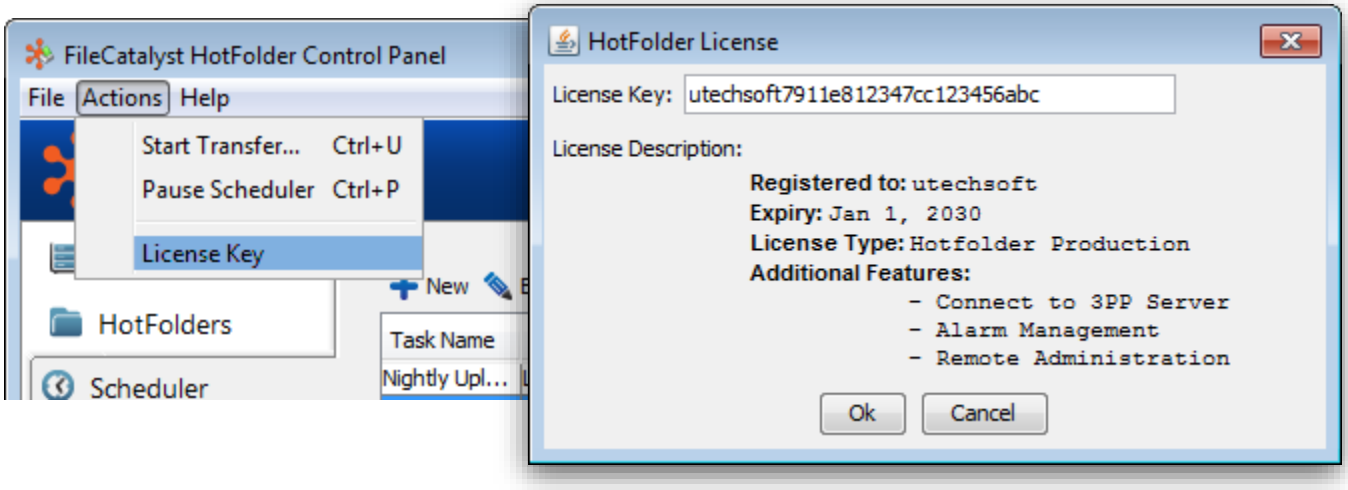
Post Task—Choose what to do with the files after transfer, Execute a PostURL action, Enable and configure E-mail alerts

FC Web—Configure the FC Web integration settings

7 Remote Administration

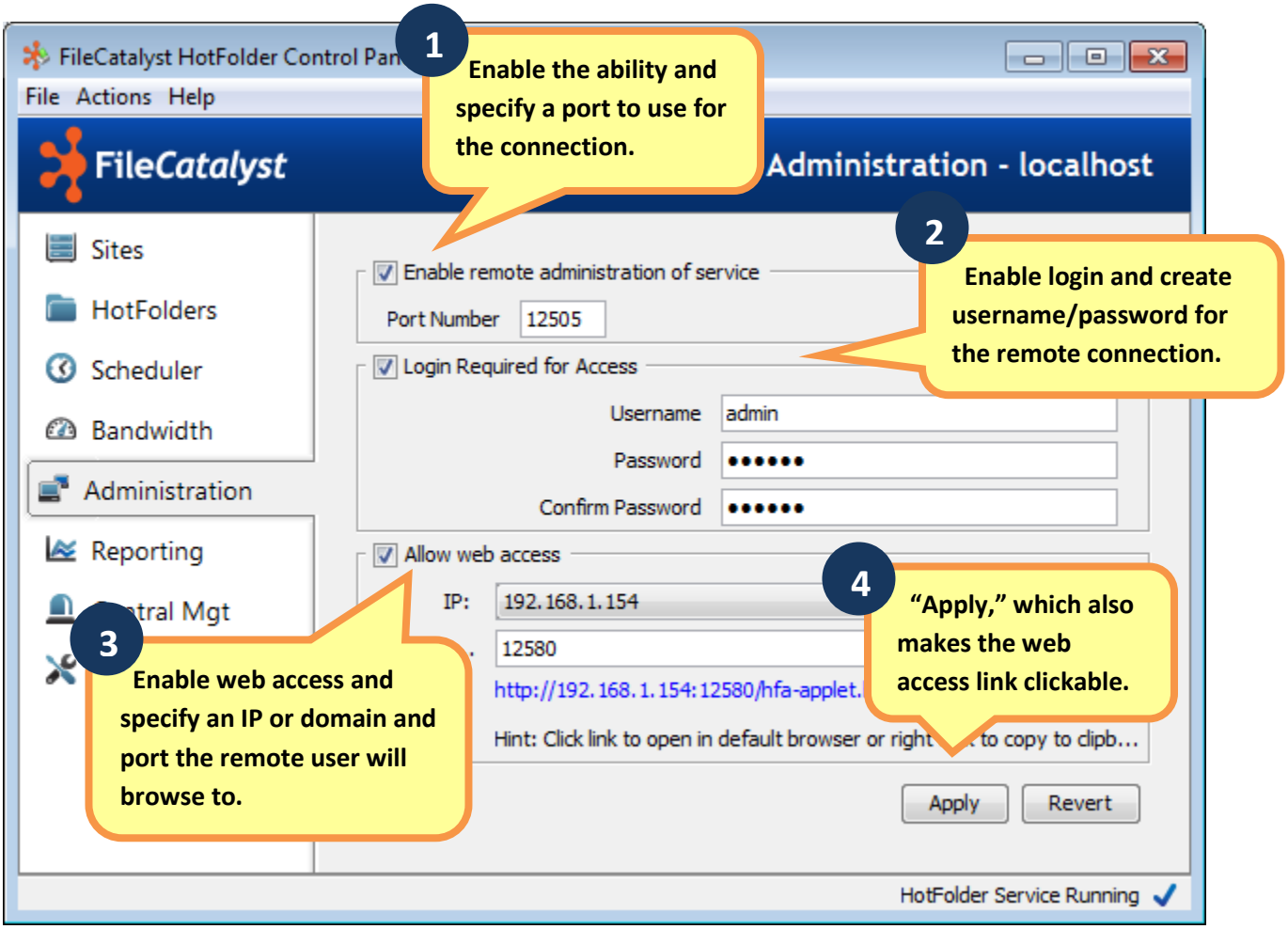
FileCatalyst HotFolder may be administered remotely, using either a thin client or a web applet. Before you can take advantage of HotFolder Admin tool, your HotFolder *must be properly licensed*. One exception: you may use HotFolder Admin to connect to HotFolder running as a service on the same machine.

If your instance is eligible, your representative will have sent a HotFolder license key along with the FileCatalyst Server license. Select "License Key" from the "Actions" menu and enter your key into the appropriate field.



7.1 Enable Features

Remote administration options are availalable from the “Administration” area:



8 Next Steps

By the end of this guide, you should have completed the following:

- Add a FileCatalyst Server as a new site
- Define a directory to be used as a HotFolder
- Tuned or scheduled your bandwidth appropriately for your environment
- Created a basic upload task, which sends files from your HotFolder to an account on the Server
- Enabled Remote Administration

The best way to learn how to use HotFolder is to go ahead and configure some tasks and put HotFolder into use to become familiar with it. Here are some starting points:

8.1 Enable Incremental

The Incremental feature is not enabled by default, meaning our test task will attempt to send ALL files every second—which may be undesirable. To manage this constant stream:

1. "Edit" the appropriate scheduled task
2. Go to "Data Minimization" tab
3. Enable Incremental with the checkbox
4. Choose Incremental option:
    a. Transfer Entire File (if file has changed, send it again in its entirety)
    b. Transfer File Deltas (send only the parts of a file that have changed)
5. Click "Apply"

8.2 Widen transfer interval

1. Edit the appropriate scheduled task
2. Go to "Schedule" tab
3. If one-minute intervals are unreasonable for your environment, select "Scheduled Execution" and modify it to transfer every hour, every day, or weekly.

8.3 Read Documentation

1. Under "Help" menu, select "Help Contents"
2. Read about each feature offered in FileCatalyst Direct
3. Modify or create new tasks in order to test options that interest you

8.4 Complete the Demo Scenario

Our example describes one user uploading files to the Server, with potentially hundreds of users then downloading those files automatically. We have walked through the upload half of the scenario; configuring the download half is nearly identical:

1. Install another HotFolder elsewhere if you can; otherwise use your existing one.
2. Add a new task in the same way already described; except, choose "Download Files From the Server" for the transfer direction

3. Enable incremental and any other options you found useful or interesting during your exploration.

9 Support

For support contact information, support hours and live chat: visit our support website at https://support.filecatalyst.com.

Copyright © 2020 Unlimi-Tech Software, Inc.