



# *FileCatalyst* 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

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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.

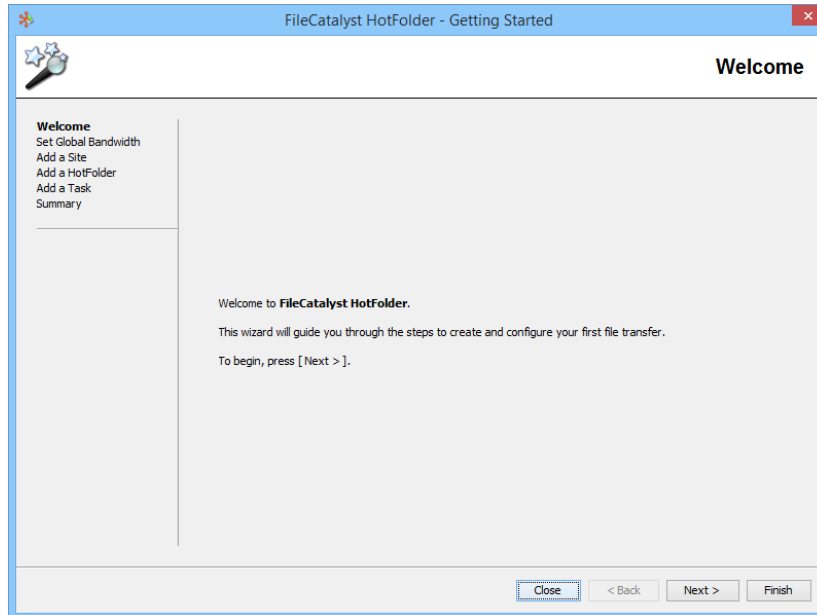
### 1.3 Running as a Service

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.



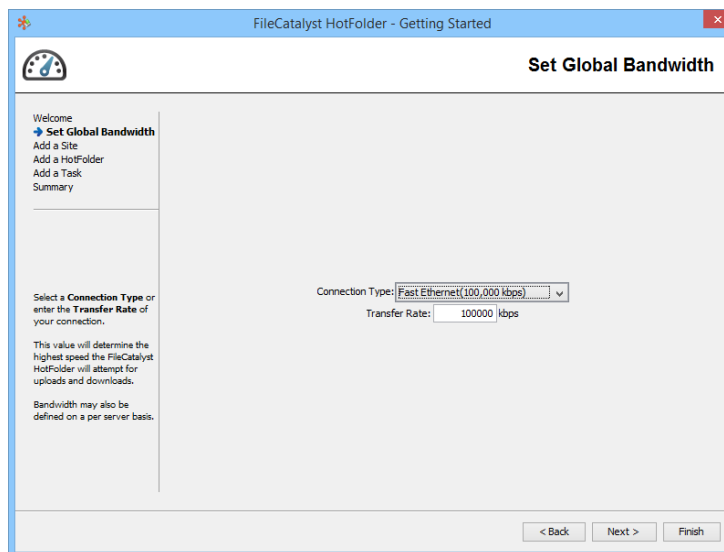
## 2 First Run Wizard

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

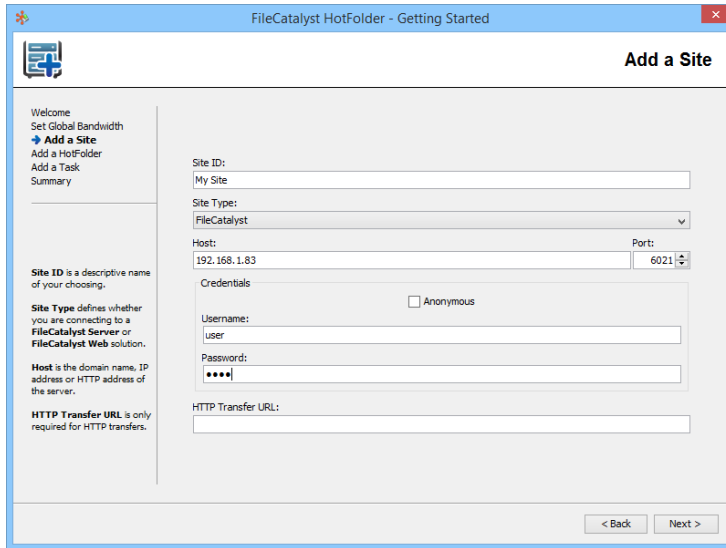
A welcome message advises that a first run wizard has been launched. Click the "Next" button to continue.



2

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





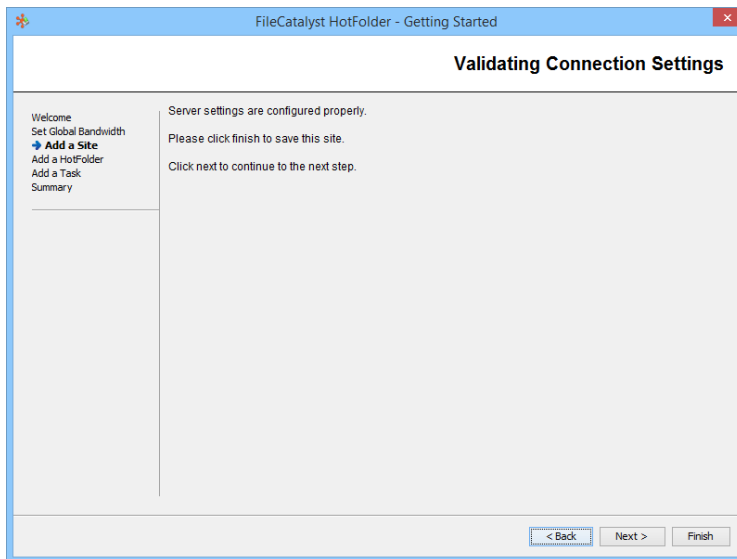
The screenshot shows the 'Add a Site' window of the FileCatalyst HotFolder - Getting Started wizard. The window has a sidebar on the left with a navigation menu: Welcome, Set Global Bandwidth, Add a Site (highlighted with a blue arrow), Add a HotFolder, Add a Task, and Summary. The main area contains the following fields and options:

- Site ID:** A text field containing 'My Site'.
- Site Type:** A dropdown menu with 'FileCatalyst' selected.
- Host:** A text field containing '192.168.1.83'.
- Port:** A spinner box set to '6021'.
- Credentials:** A section with an 'Anonymous' checkbox (unchecked) and a 'Username' field containing 'user'.
- Password:** A field with masked characters '••••'.
- HTTP Transfer URL:** An empty text field.

At the bottom right, there are '< Back' and 'Next >' buttons.

3

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



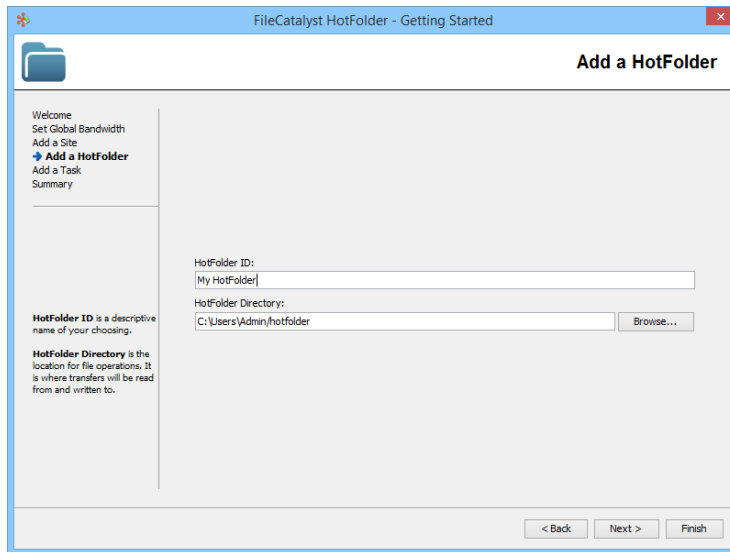
The screenshot shows the 'Validating Connection Settings' window of the FileCatalyst HotFolder - Getting Started wizard. The sidebar on the left is identical to the previous step, with 'Add a Site' highlighted. The main area displays the following text:

- Server settings are configured properly.
- Please click finish to save this site.
- Click next to continue to the next step.

At the bottom right, there are '< Back', 'Next >', and 'Finish' buttons.

4

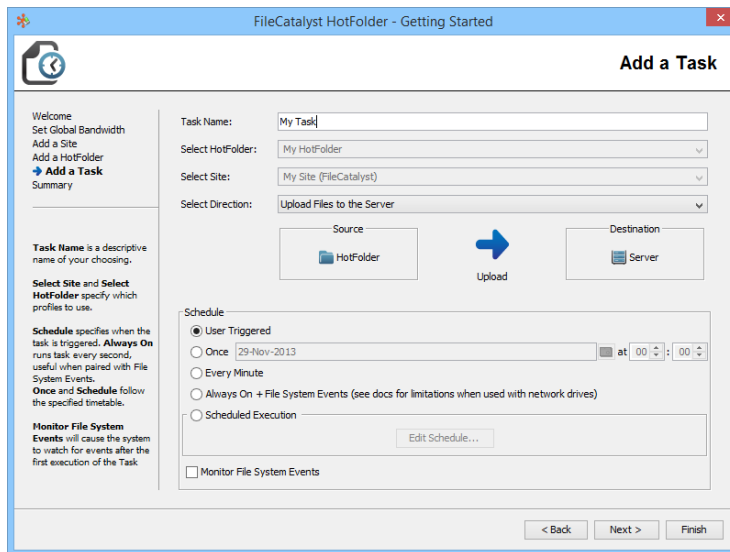
If you have entered valid site information, a confirmation will appear and you may proceed. Otherwise you must go "Back".



The screenshot shows the 'Add a HotFolder' window. On the left, a sidebar contains a list of steps: 'Welcome', 'Set Global Bandwidth', 'Add a Site', 'Add a HotFolder' (highlighted), 'Add a Task', and 'Summary'. The main area has two input fields: 'HotFolder ID:' with the value 'My HotFolder' and 'HotFolder Directory:' with the value 'C:\Users\Admin\hotfolder'. A 'Browse...' button is next to the directory field. At the bottom, there are '< Back', 'Next >', and 'Finish' buttons.

5

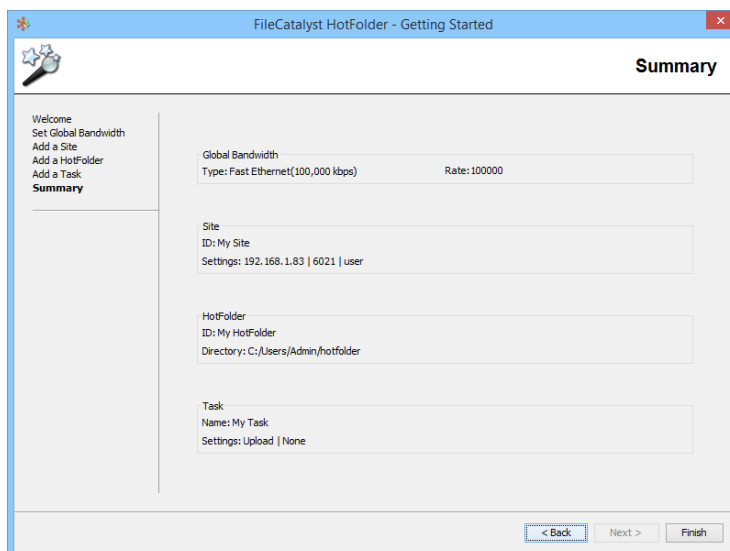
The HotFolder is the location where your data will come from or synch to. Clicking Next will create the directory.



The screenshot shows the 'Add a Task' window. The sidebar is the same as the previous window. The main area has several fields: 'Task Name:' (My Task), 'Select HotFolder:' (My HotFolder), 'Select Site:' (My Site (FileCatalyst)), and 'Select Direction:' (Upload Files to the Server). Below these is a visual representation of the upload process: a 'Source' box labeled 'HotFolder' with an arrow pointing to a 'Destination' box labeled 'Server'. The 'Schedule' section has radio buttons for 'User Triggered' (selected), 'Once' (29-Nov-2013), 'Every Minute', 'Always On + File System Events', and 'Scheduled Execution'. There is an 'Edit Schedule...' button. At the bottom, there are '< Back', 'Next >', and 'Finish' buttons.

6

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



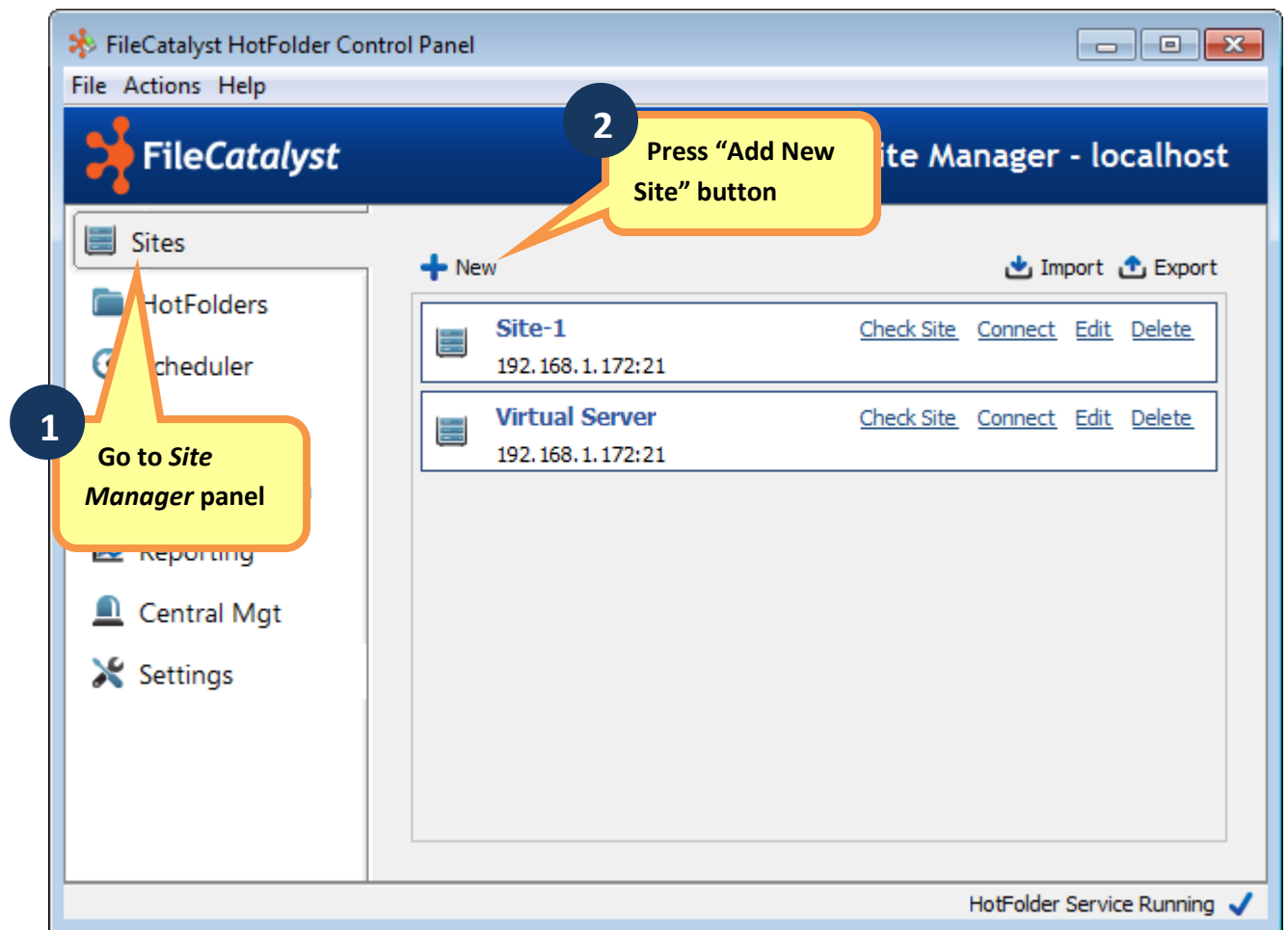
The screenshot shows the 'Summary' window. The sidebar is the same as the previous windows. The main area displays a summary of the configuration: 'Global Bandwidth' (Type: Fast Ethernet(100,000 kbps), Rate: 100000), 'Site' (ID: My Site, Settings: 192.168.1.83 | 6021 | user), 'HotFolder' (ID: My HotFolder, Directory: C:\Users\Admin\hotfolder), and 'Task' (Name: My Task, Settings: Upload | None). At the bottom, there are '< Back', 'Next >', and 'Finish' buttons.

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:

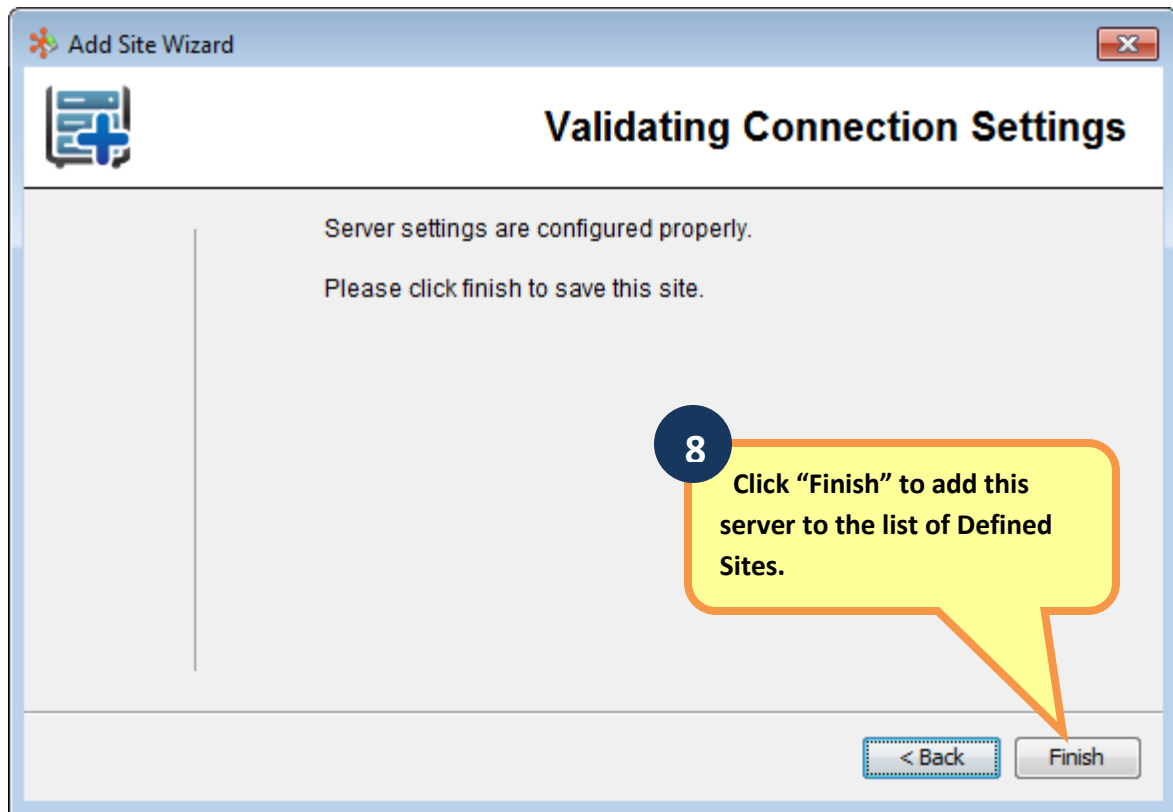
The screenshot shows the 'Add Site Wizard' window with the following fields and callouts:

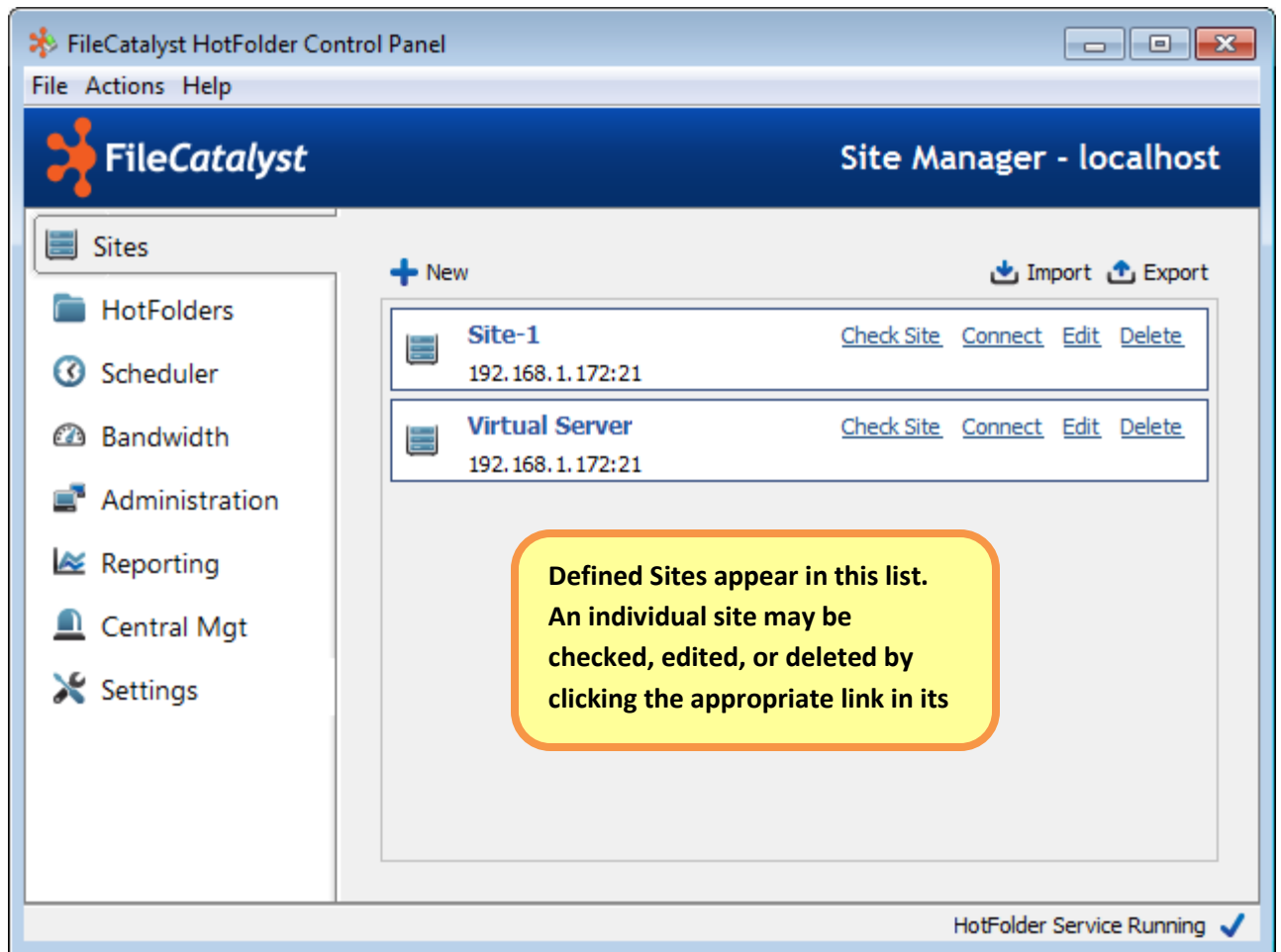
- 3** Enter a Site ID of your own choosing. (Points to the Site ID text box)
- 4** Set the Host IP and Port for your FileCatalyst Server (Points to the Host and Port text boxes)
- 5** Uncheck box to enable authentication (Points to the Anonymous checkbox)
- 6** Specify the username and password for a test user which already exists on the Server (Points to the Username and Password text boxes)
- 7** Click “Next” (Points to the Next button)

The wizard includes a sidebar with a 'Site Type' section and a 'Host' section. The 'Site Type' section has a description: 'Site Type defines whether you are connecting to a FileCatalyst Server or FileCatalyst Web solution.' The 'Host' section has a description: 'Host IP address only required for HTTP transfers.'

The 'Credentials' section contains the 'Anonymous' checkbox, which is currently checked. The 'HTTP Transfer URL' field is empty.

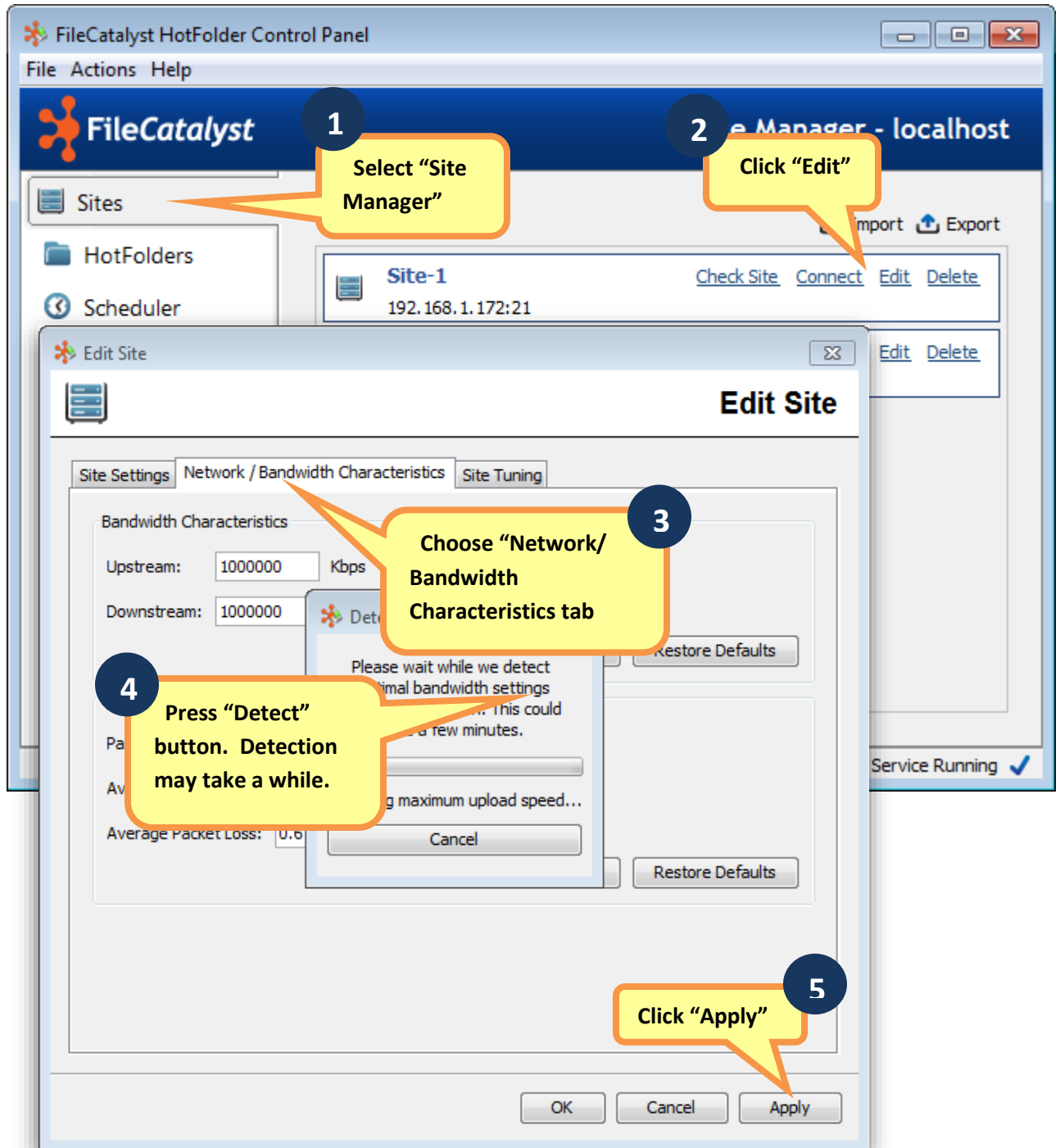
At the bottom, there are '< Back' and 'Next >' buttons.





### 3.2 Detect Bandwidth for Site

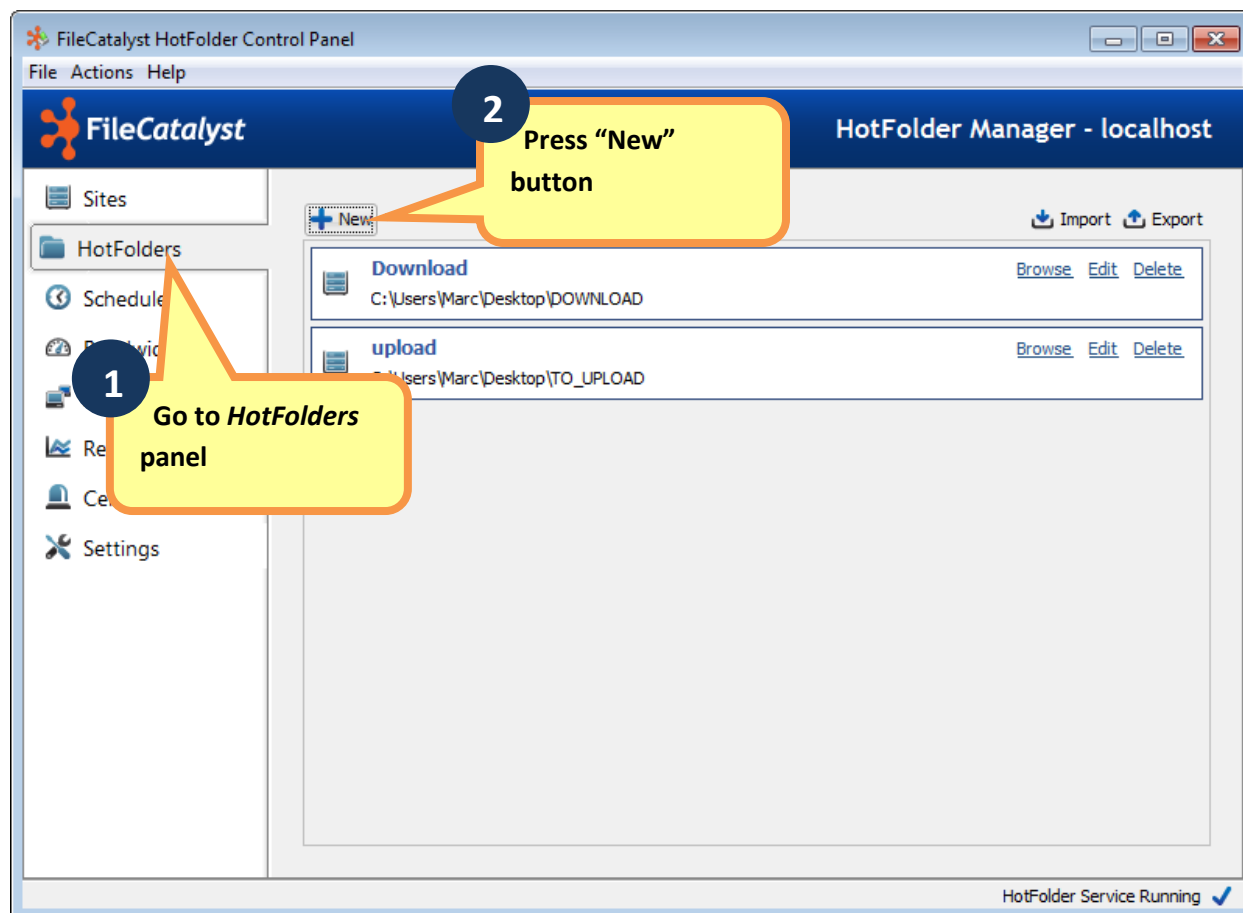
You need not detect bandwidth if you are confident that your settings in Bandwidth Scheduler (section 4 of this document) will regulate your connection. However, if you are connecting to a site with unknown bandwidth characteristics, you may want to auto-detect.



## 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.

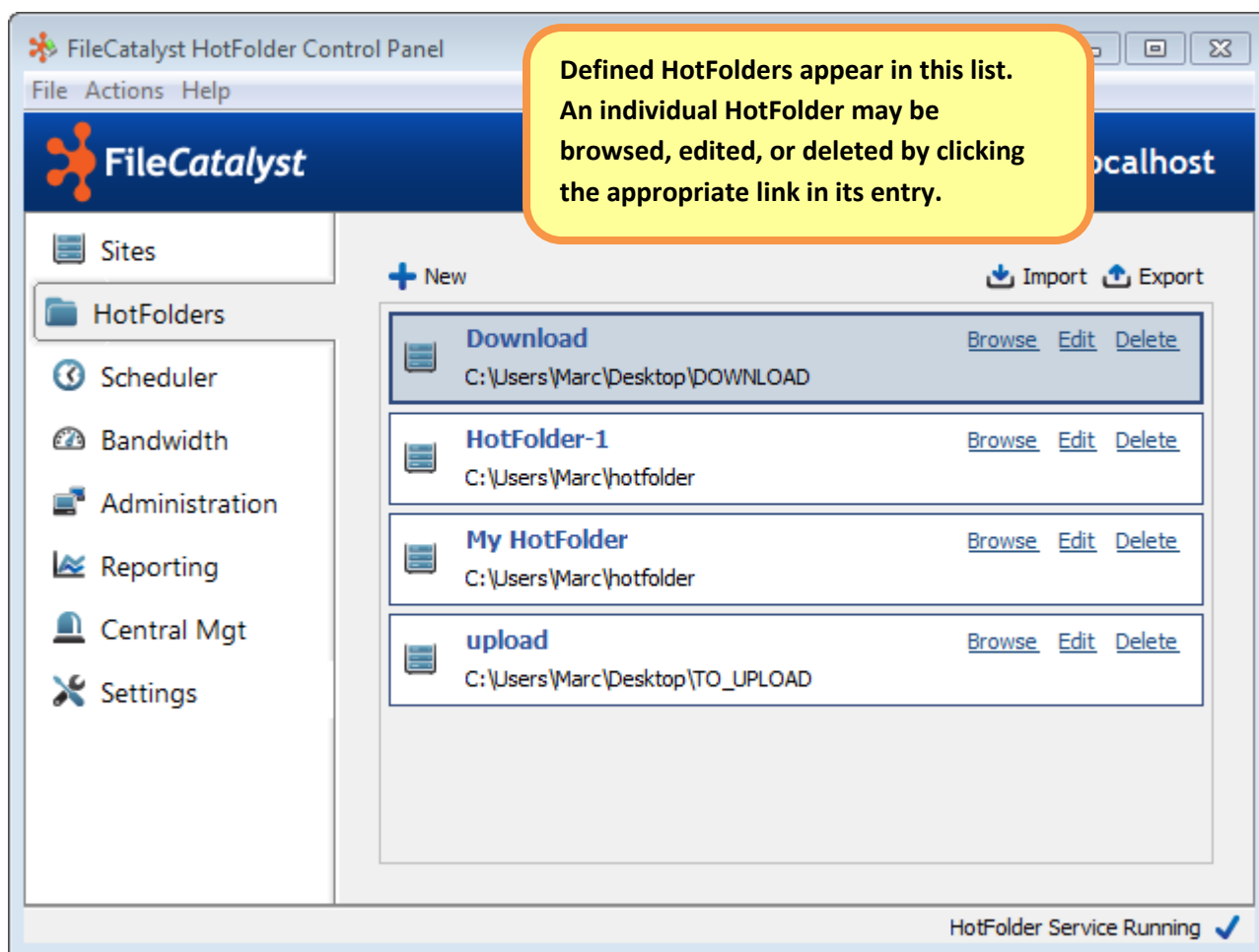
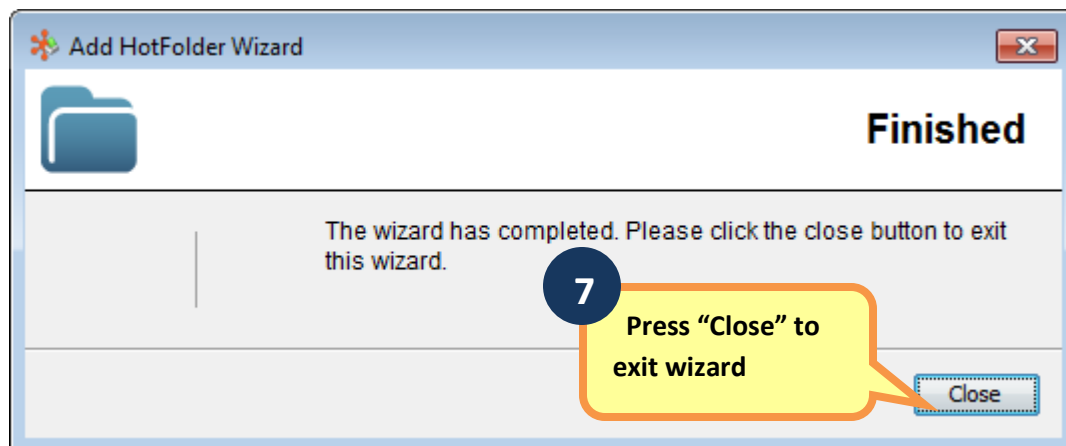
HotFolder ID is a descriptive name of your choosing.

HotFolder ID:

HotFolder Directory:

**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

**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:

The screenshot shows the 'FileCatalyst HotFolder Control Panel' window. The title bar reads 'FileCatalyst HotFolder Control Panel'. The main window has a menu bar with 'File', 'Actions', and 'Help'. Below the menu bar is a header with the FileCatalyst logo and the text 'Bandwidth Scheduler - localhost'. On the left is a sidebar with a tree view containing 'Sites', 'HotFolders', 'Scheduler', 'Bandwidth', 'Administration', 'Reporting', and 'Central Mgt'. The 'Bandwidth' item is selected. The main area displays a table with columns for days of the week (Monday, Tues..., Wedn..., Thurs..., Friday, Satur...) and rows for time slots (0:00, 1:00, 2:00, 3:00, 4:00, etc.). A context menu is open over the table, listing various bandwidth options: 'No Transfers', 'Cable/DSL (384 Kbps)', 'Fast Cable/DSL (768 Kbps)', 'T1 (1,544 Kbps)', 'Ethernet (10,000 Kbps)', '802.11B (11,000 Kbps)', 'T3 (44,736 Kbps)', '802.11G (54,000 Kbps)', 'Fast Ethernet (100,000 Kbps)', 'OC-3 (155,520 Kbps)', 'OC-12 (622,080 Kbps)', 'Gigabit (1,000,000 Kbps)', '2 gbps (2,000,000 Kbps)', '5 gbps (5,000,000 Kbps)', '10 gbps (10,000,000 Kbps)', 'Custom', and 'Select All'. The 'Fast Ethernet (100,000 Kbps)' option is highlighted. Three callouts are present: 1. A yellow callout pointing to the 'Bandwidth' item in the sidebar, with the text 'Click to go to "Bandwidth" panel'. 2. A yellow callout pointing to the top-left cell of the table (0:00 Monday), with the text 'Click and drag from top-left cell to bottom-right cell to highlight every hour of the week.' 3. A yellow callout pointing to the context menu, with the text 'Right-click any cell and choose new bandwidth from menu. (click "Select Rate" for'.

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:

The screenshot shows the FileCatalyst HotFolder Control Panel. The left sidebar contains a tree view with the following items: Sites, HotFolders, Scheduler, Bandwidth (selected), Administration, and Settings. The main area displays a table of bandwidth usage over time. The table has columns for Time, and several columns for bandwidth usage (Kbps). The rows show times from 5:00 to 22:00. The bandwidth usage is 100,000 Kbps for most of the day, but it is highlighted for 8:00 to 17:00. A 'Custom Rate' dialog box is open, prompting the user to enter a rate of transfer for this time period (in Kbps). The dialog box has an 'OK' button and a 'Cancel' button. A yellow callout box with the number 4 points to the 'Bandwidth' section in the sidebar and says: 'Highlight only the hours to be modified.' A yellow callout box with the number 5 points to a cell in the table and says: 'Right-click any cell and choose "Custom" to reveal the Custom Rate dialog'. A yellow callout box with the number 6 points to the 'OK' button in the dialog box and says: 'Enter new rate (eg. 50000) then click "OK"'. The status bar at the bottom right says 'HotFolder Service Running' with a green checkmark.

Time	100000	100000	100000	100000	100000	100000	100000
5:00	100000	100000	100000				
6:00	100000	100000	100000				
7:00	100000	100000	100000				
8:00	100000	100000	100000	100000	100000	100000	100000
9:00	100000	100000	100000	100000	100000	100000	100000
10:00	100000	100000	100000	100000	100000	100000	100000
11:00	100000	100000	100000	100000	100000	100000	100000
12:00	100000	100000	100000	100000	100000	100000	100000
13:00	100000	100000	100000	100000	100000	100000	100000
14:00	100000	100000	100000	100000	100000	100000	100000
15:00	100000	100000	100000	100000	100000	100000	100000
16:00	100000	100000	100000	100000	100000	100000	100000
17:00	100000	100000	100000	100000	100000	100000	100000
18:00	100000	100000	100000	100000	100000	100000	100000
19:00	100000	100000	100000	100000	100000	100000	100000
20:00	100000	100000	100000	100000	100000	100000	100000
21:00	100000	100000	100000	100000	100000	100000	100000
22:00	100000	100000	100000	100000	100000	100000	100000

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

FileCatalyst HotFolder Control Panel

File Actions Help

**FileCatalyst** Transfer Scheduler - localhost

Sites  
HotFolders  
**Scheduler**  
Bandwidth  
Administration  
Reporting  
Central Mgt  
Settings

+ New Edit X Delete Execute Cancel Activity

Task Name	HotFolder	Server	Direction	Status	Next Exec...
Download	Download	Site-1 (File...	Download	Idle	Never
upload	upload	Virtual Serv...	Upload	Idle	4/10/12 4:3...

Click to go to the Scheduler panel 1

Click "New" to launch Add Task Wizard 2

☒ Allow concurrent tasks ☐ Pause Scheduler Import Export

HotFolder Service Running ✓

**3** Set a Task Name of your own choosing

**4** Select a HotFolder

**5** Select a Site

**6** Choose "Upload Files to the Server"

**7** By default, Schedule will be None. Switch to Always On for continuous activity.

**8** Select Scheduled Execution to edit the days the task will run.

**9** Click "Finish"

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:

The screenshot shows the FileCatalyst HotFolder Control Panel interface. On the left is a sidebar with navigation options: Sites, Bandwidth, Administration, Reporting, Central Mgt, and Settings. The main area displays a table of tasks. A yellow callout box with a blue circle containing the number '1' points to the first row of the table, with the text 'Highlight task to be monitored'. A second yellow callout box with a blue circle containing the number '2' points to the 'Execute' button above the table, with the text 'If a task is not already running, Click "Execute" to force a transfer.' A third yellow callout box with a blue circle containing the number '3' points to the 'Activity' button above the table, with the text 'Click "Activity".' The table has columns: Task Name, HotFolder, Server, Direction, Status, Next, and Execute. The first row is highlighted in blue and contains: Download, Download, Site-1 (File..., Download, Idle, Next, and Execute. The second row contains: upload, upload, Virtual Ser..., Upload, Idle, 4/, and 4:... Below the table are checkboxes for 'Allow concurrent tasks' (checked), 'Pause Scheduler', 'Import', and 'Export'. At the bottom right, it says 'HotFolder Service Running' with a checkmark icon.

1 Highlight task to be monitored

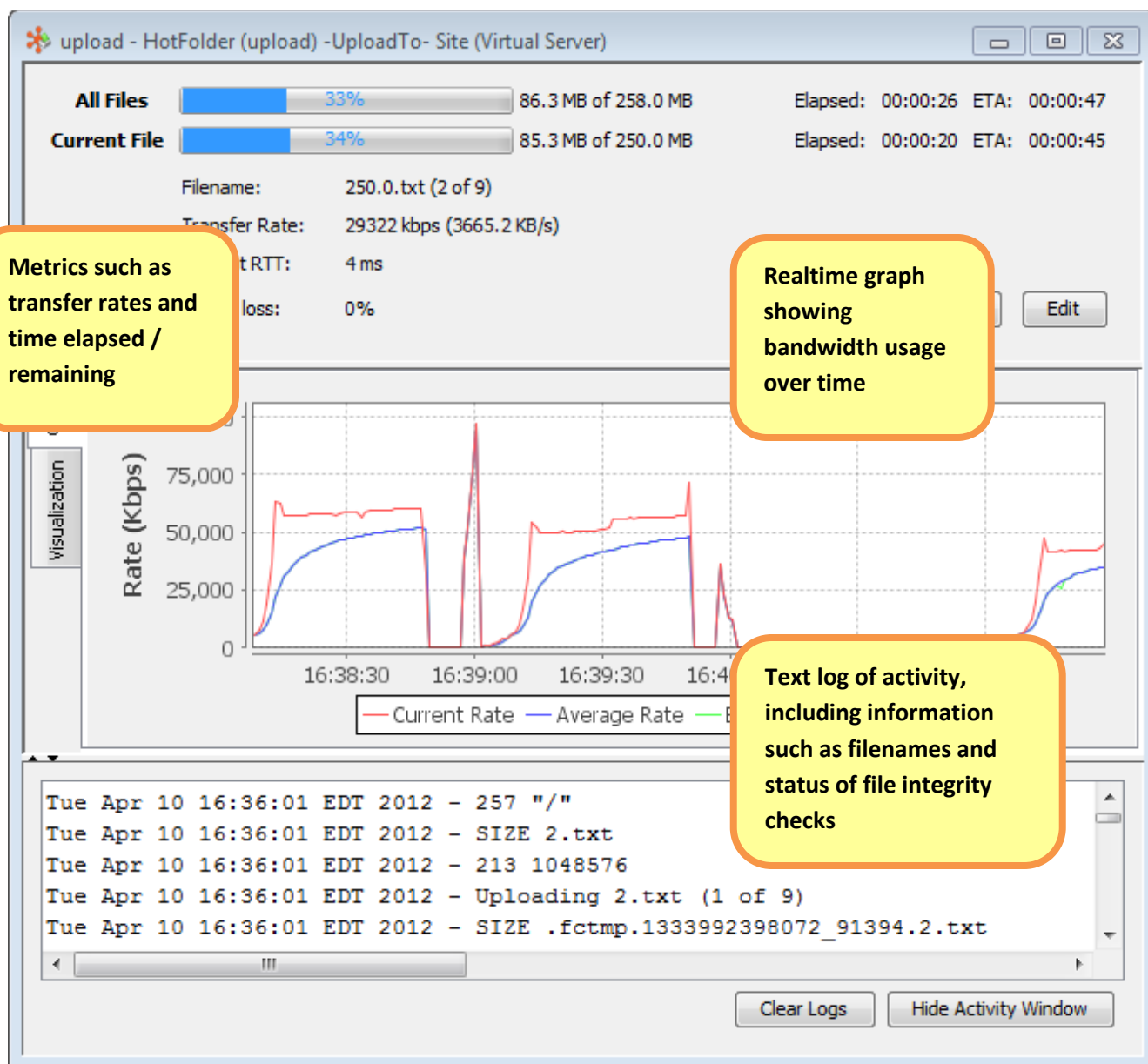
2 If a task is not already running, Click "Execute" to force a transfer.

3 Click "Activity".

Task Name	HotFolder	Server	Direction	Status	Next	Execute
Download	Download	Site-1 (File...	Download	Idle	Next	Execute
upload	upload	Virtual Ser...	Upload	Idle	4/	4:...

HotFolder Service Running ✓

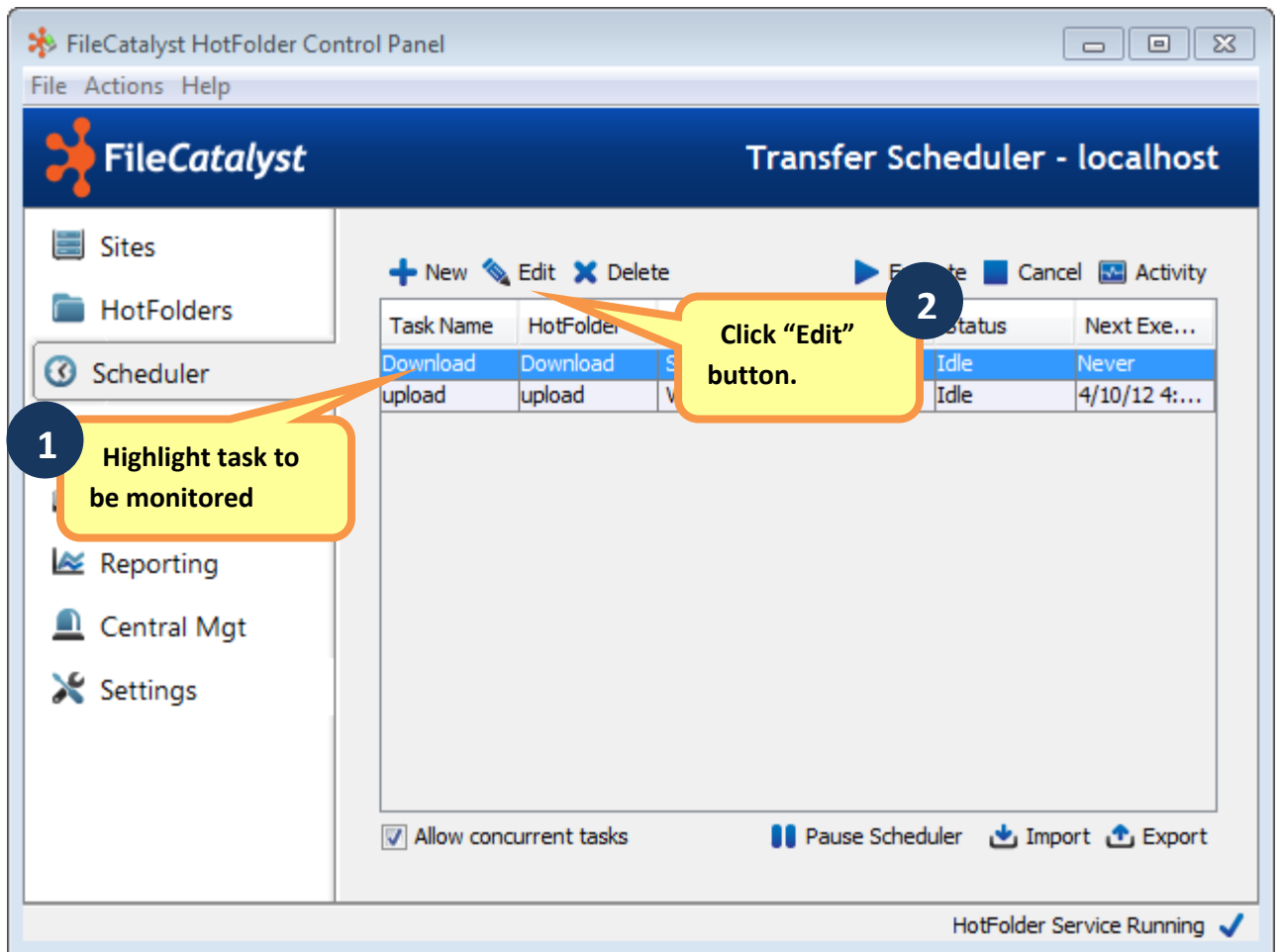


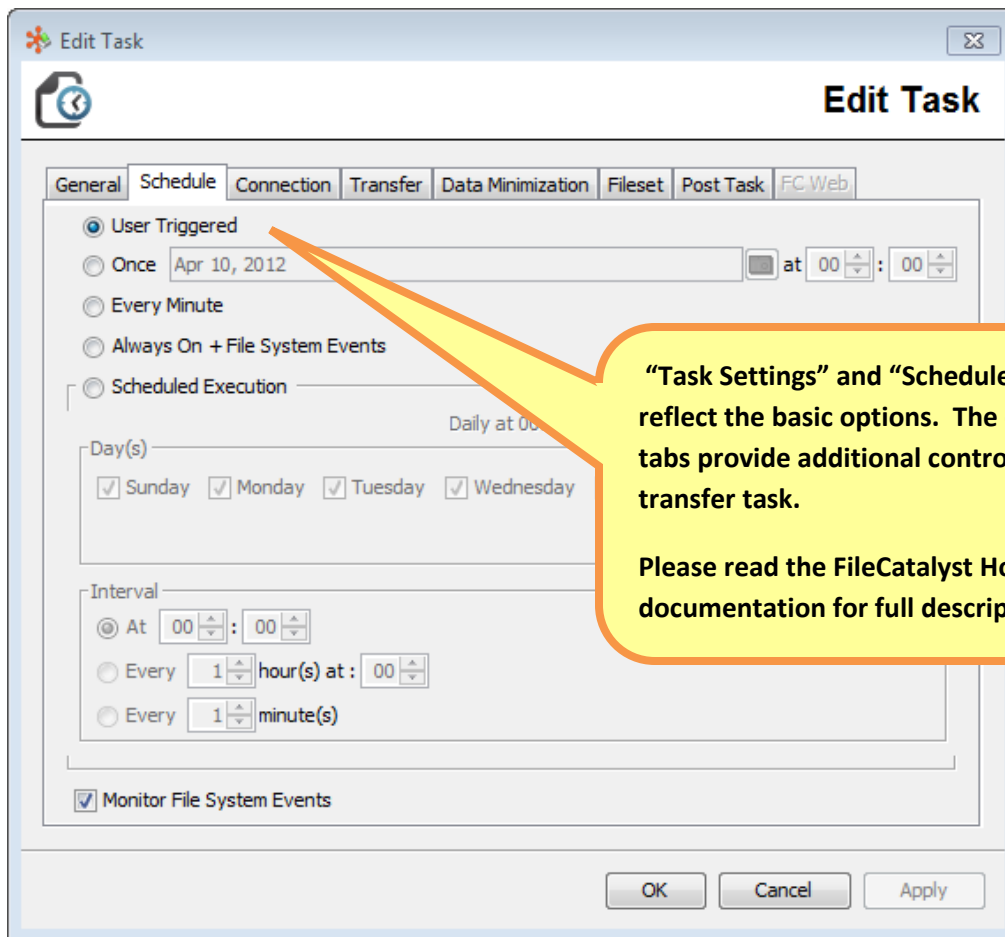


## 6.4 Edit a Task

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







### 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

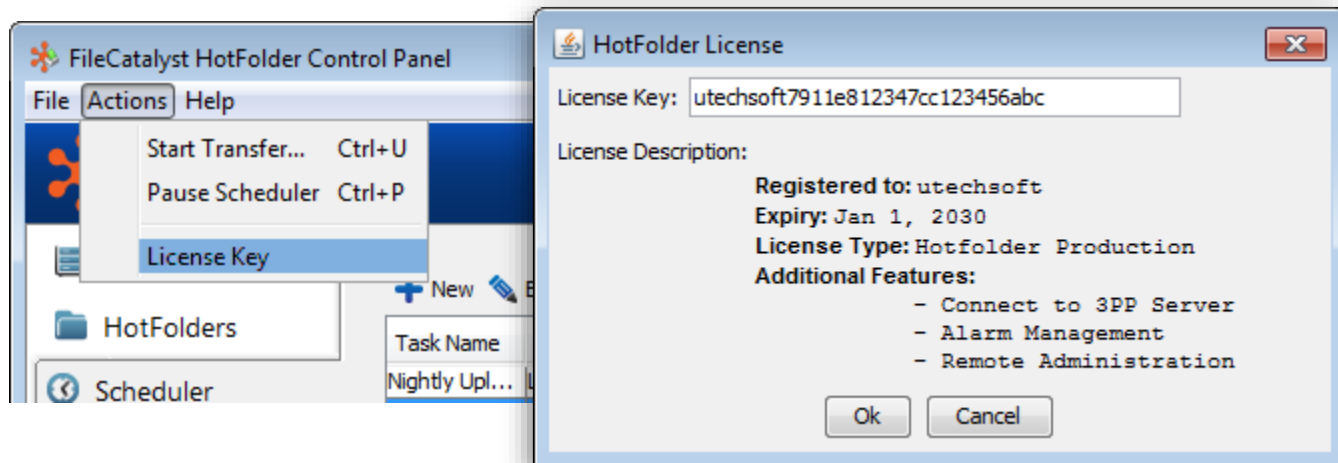
**Post Task**—Choose what to do with the files after transfer, Execute a PostURL action, Enable and configure E-mail alerts

**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 available from the “Administration” area:

The screenshot shows the FileCatalyst HotFolder Control Panel window titled "Administration - localhost". The left sidebar contains a menu with items: Sites, HotFolders, Scheduler, Bandwidth, Administration (selected), Reporting, and Central Mgt. The main content area is for the Administration settings. Four numbered callouts provide instructions:

- 1** Enable the ability and specify a port to use for the connection. (Points to the "Enable remote administration of service" checkbox and the "Port Number" field set to 12505.)
- 2** Enable login and create username/password for the remote connection. (Points to the "Login Required for Access" checkbox and the "Username" field set to "admin".)
- 3** Enable web access and specify an IP or domain and port the remote user will browse to. (Points to the "Allow web access" checkbox and the "IP" field set to 192.168.1.154.)
- 4** "Apply," which also makes the web access link clickable. (Points to the "Apply" button.)

Additional visible details include the "Password" and "Confirm Password" fields, a generated web access link: <http://192.168.1.154:12580/hfa-applet>, and a status bar at the bottom right indicating "HotFolder Service Running" with a green checkmark.

## 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>.

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