

FORTRA
FileCatalyst

*FileCatalyst HotFolder
QuickStart Guide*

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Introduction

FileCatalyst HotFolder is the most 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 often 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 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 MacOS X

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

1.2.4 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
```

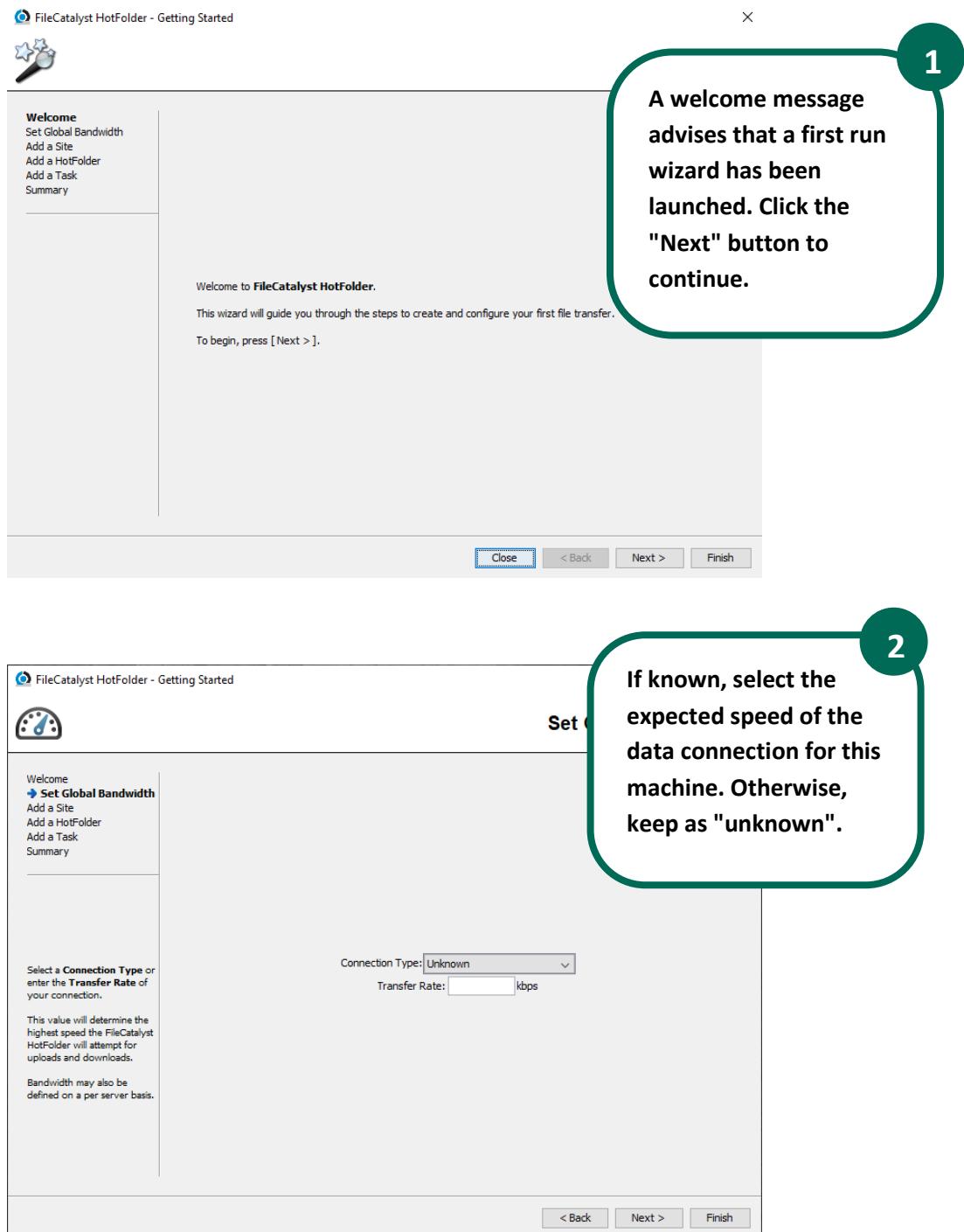
4. With the tarball unpacked, you will now have access to the `README` file. Open this file and continue following the instructions in order to complete installation
5. Assuming installation is complete and you are in the `HotFolder` directory, enter the command `./fc_hotfolder.sh` to start the application.

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.

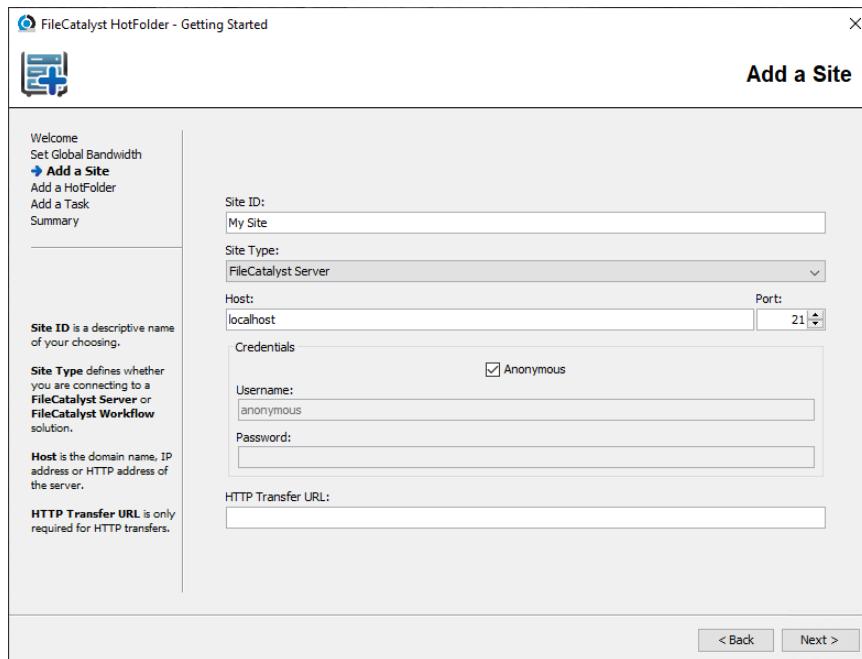


1

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

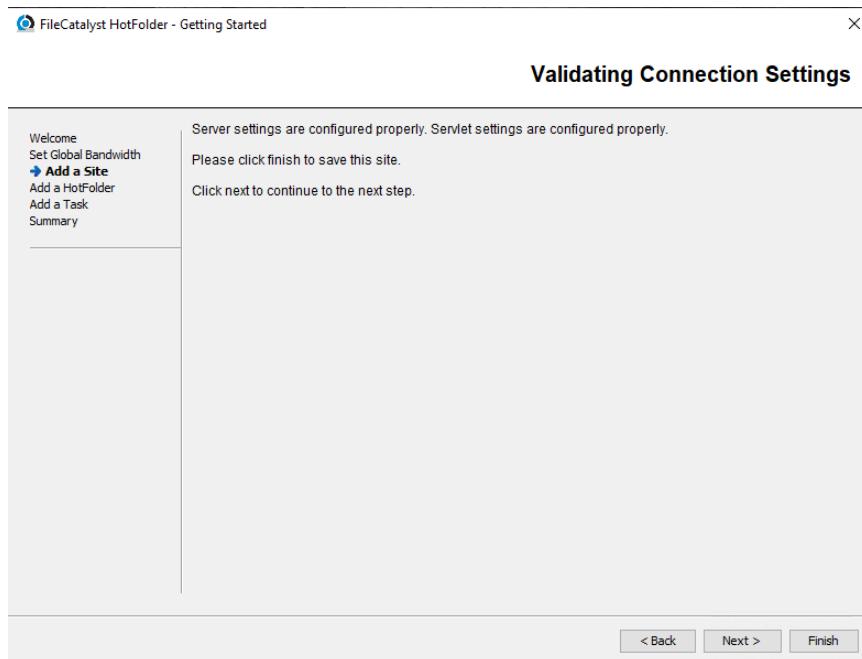
2

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



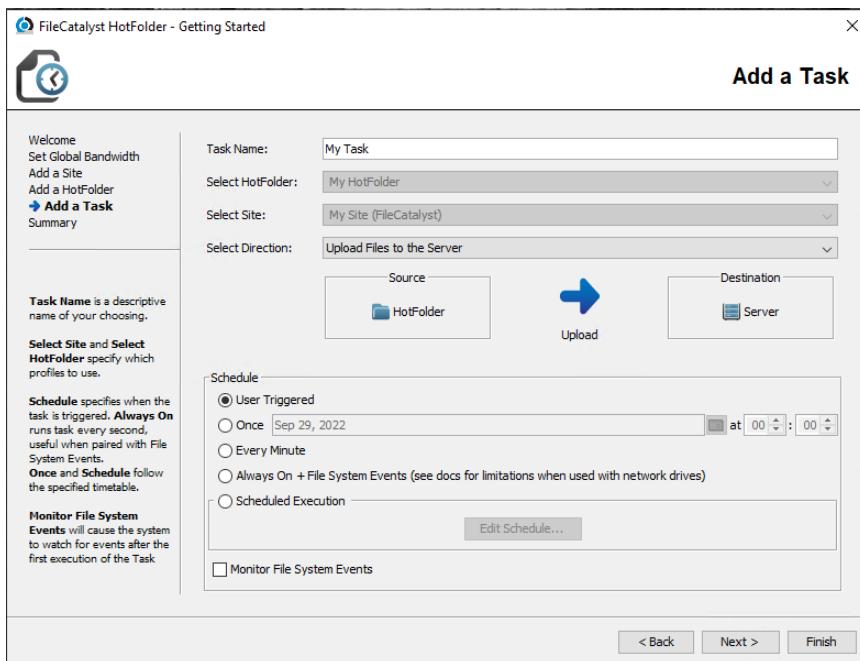
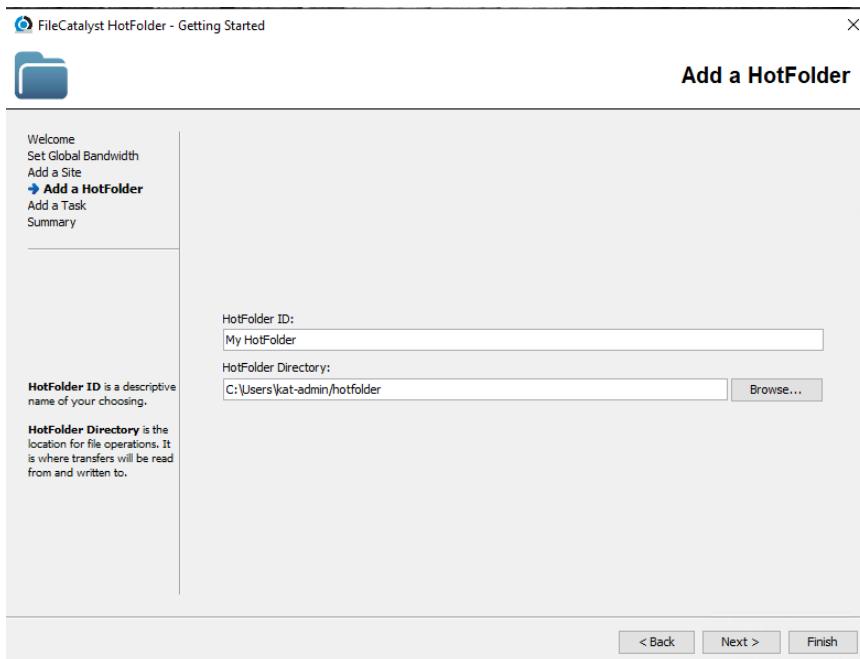
3

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".



FileCatalyst HotFolder - Getting Started

Summary

Global Bandwidth

Type: Unknown Rate: 1000000

Site

ID: My Site Settings: 10.60.163.200 | 21 | user_001

HotFolder

ID: My HotFolder Directory: C:/Users/kat-admin/hotfolder/

Task

Name: My Task Settings: Upload | None

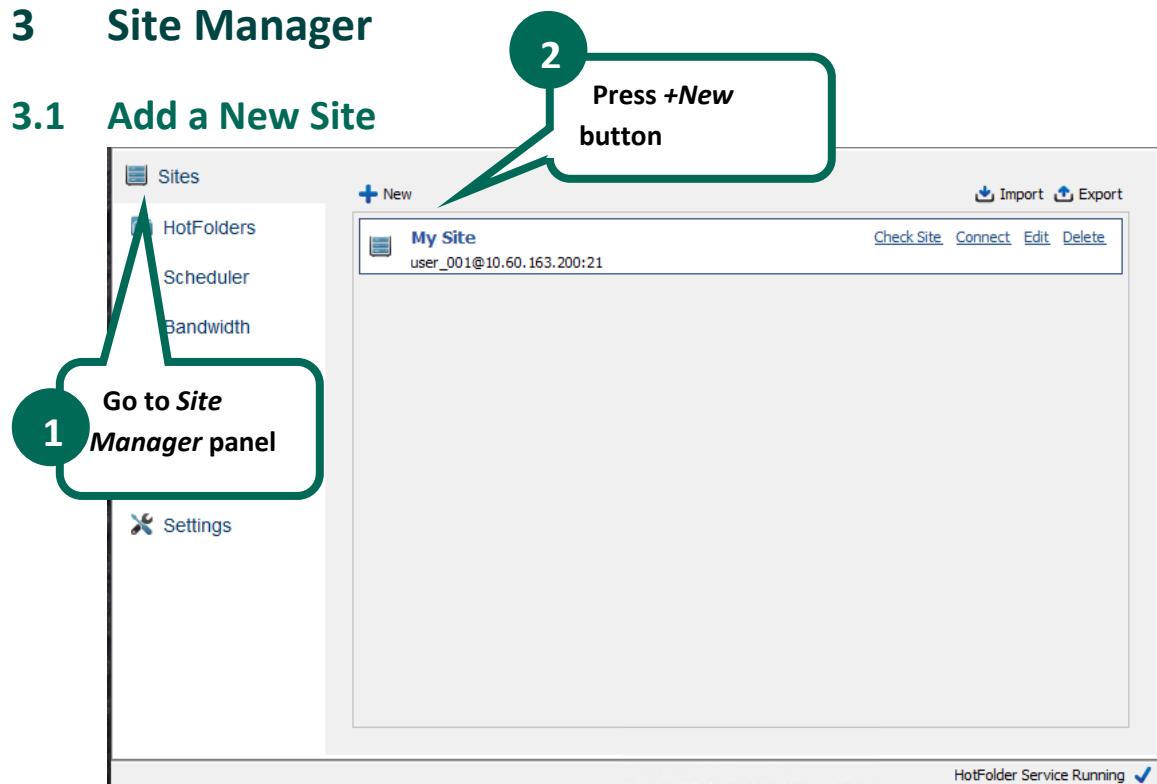
< Back Next > Finish

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

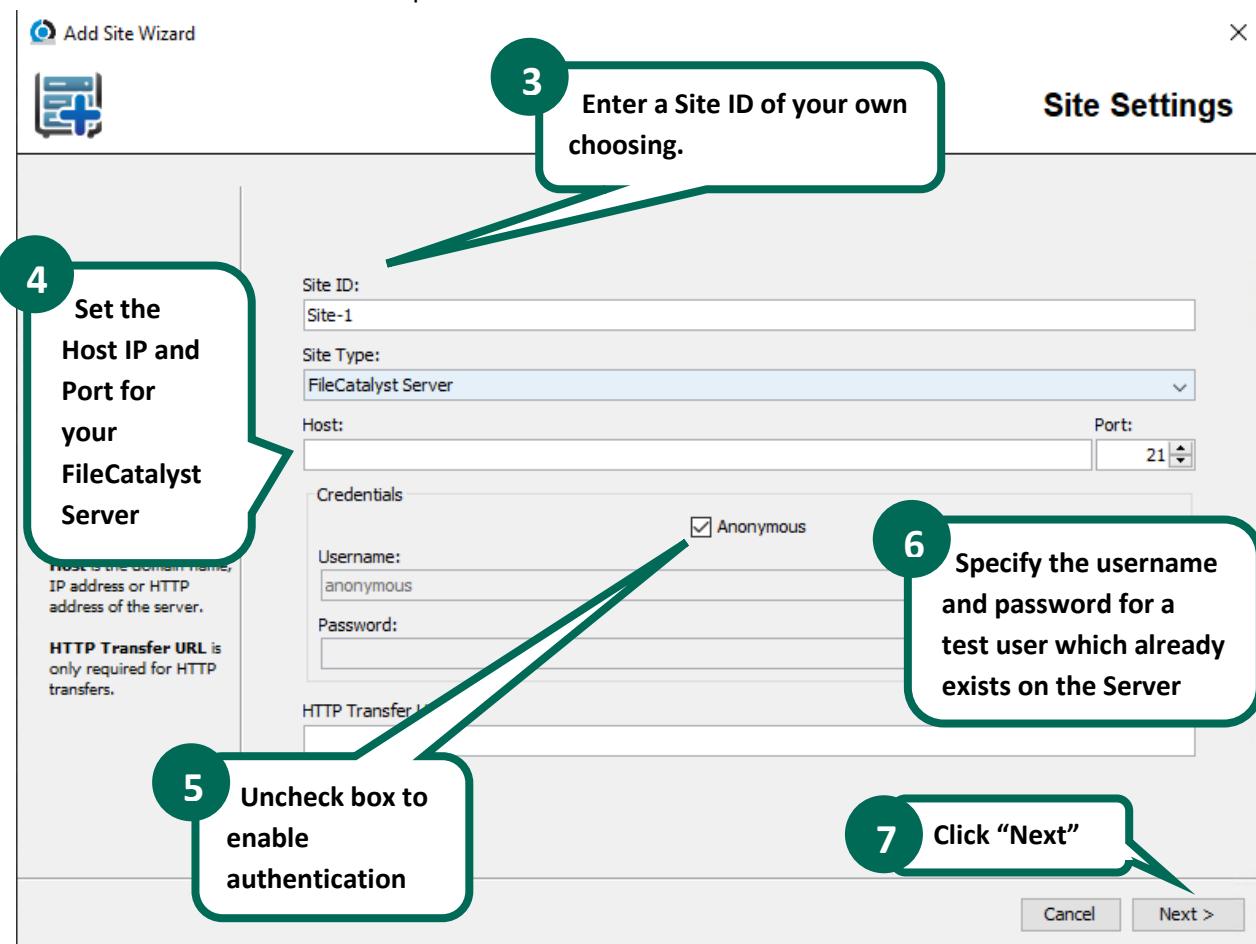
7

3 Site Manager

3.1 Add a New Site



The “Add New Site” Wizard will open:



 Add Site Wizard X



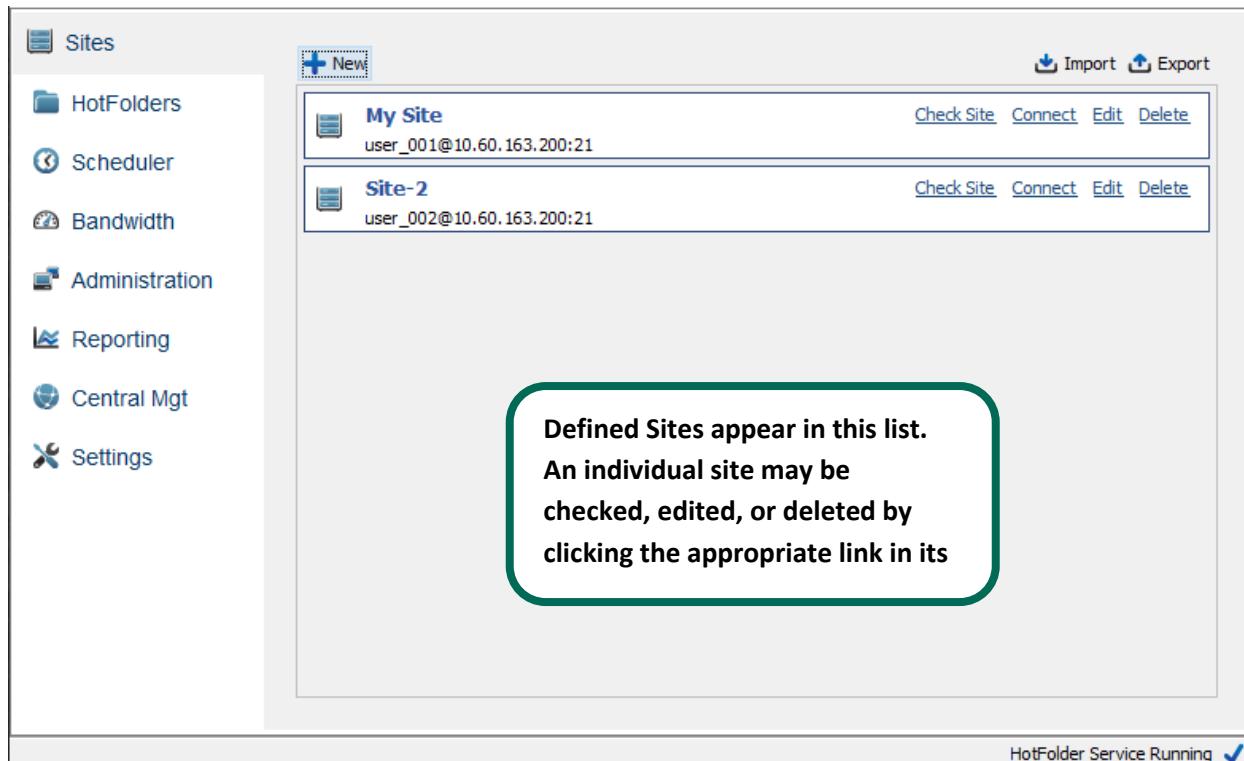
Validating Connection Settings

Server settings are configured properly. Servlet 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**



The screenshot shows the 'Sites' section of the FileCatalyst HotFolder interface. On the left, a sidebar lists various management options: HotFolders, Scheduler, Bandwidth, Administration, Reporting, Central Mgt, and Settings. The 'Sites' option is selected. The main panel displays a list of defined sites. A 'New' button is at the top left of the list area. The list contains two entries:

Site Name	Address	Actions
My Site	user_001@10.60.163.200:21	Check Site Connect Edit Delete
Site-2	user_002@10.60.163.200:21	Check Site Connect Edit Delete

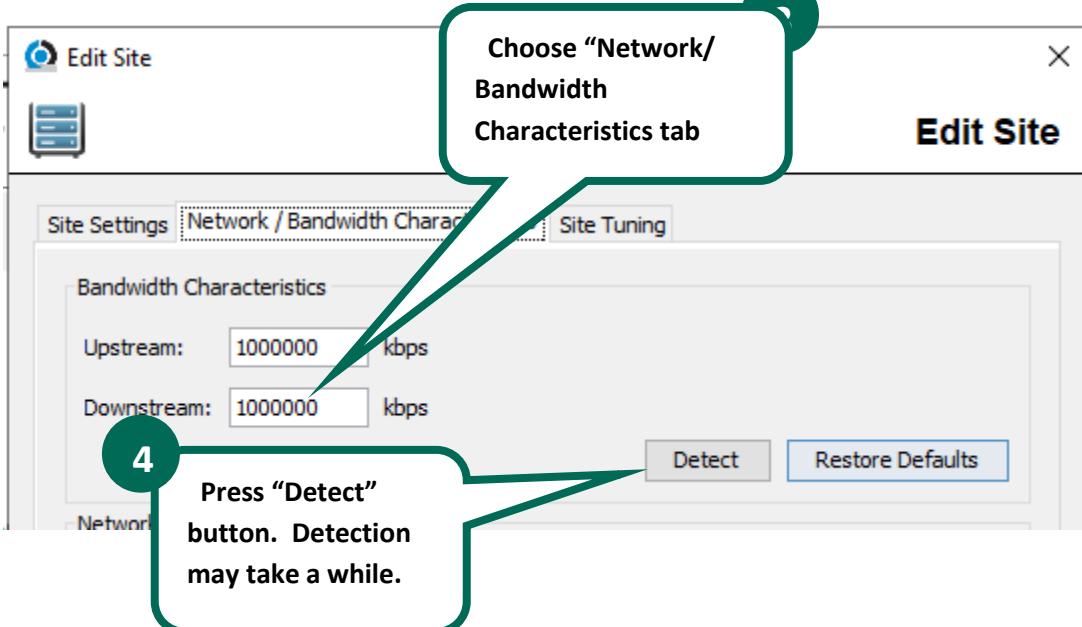
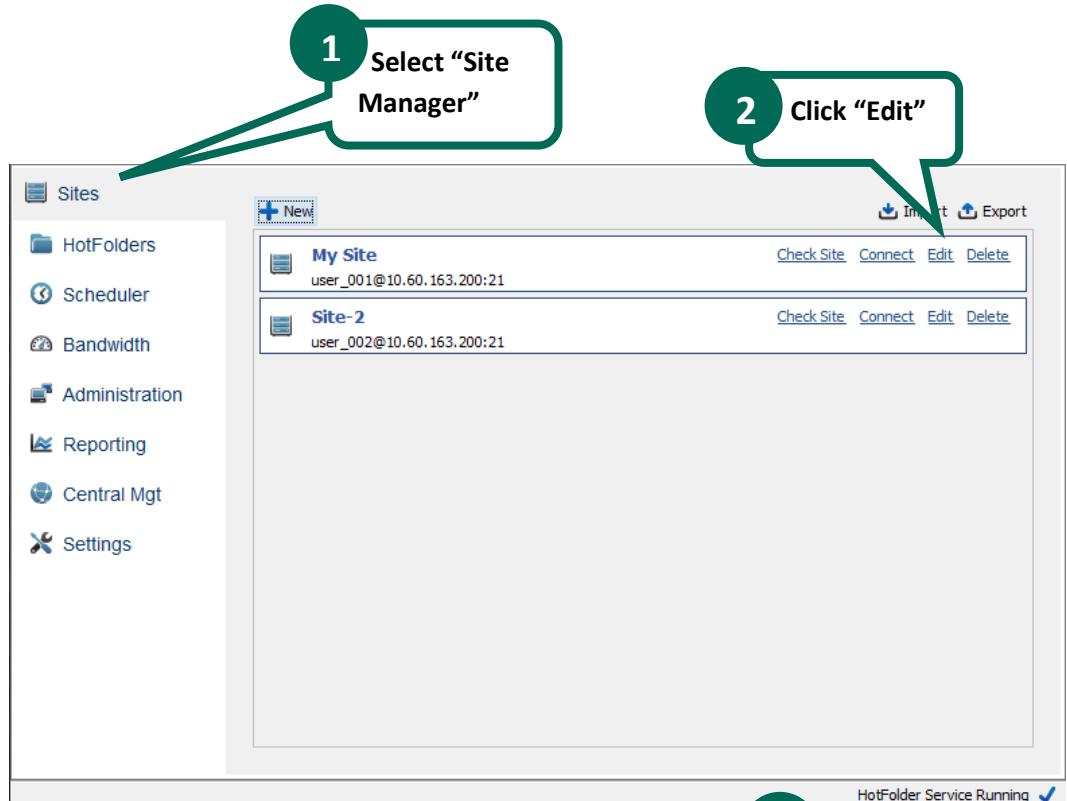
At the top right of the main panel are 'Import' and 'Export' buttons. A callout box with a green border and black text is overlaid on the site list, containing the following instructions:

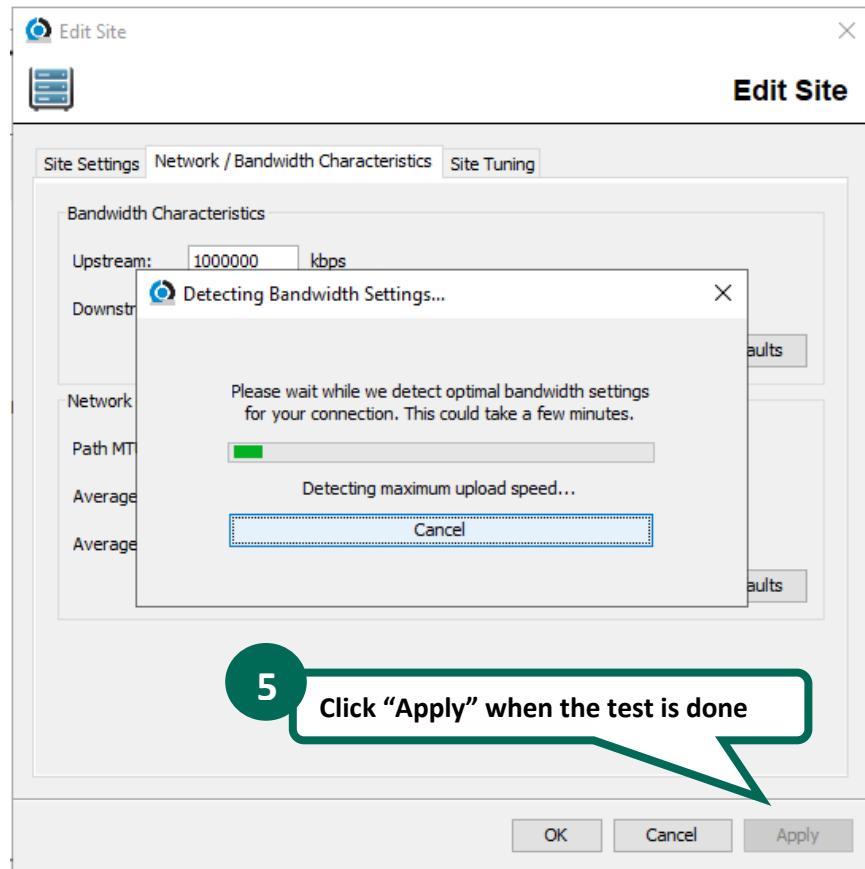
**Defined Sites appear in this list.
An individual site may be
checked, edited, or deleted by
clicking the appropriate link in its**

At the bottom right of the main panel, a status message reads "HotFolder Service Running" with a green checkmark icon.

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.

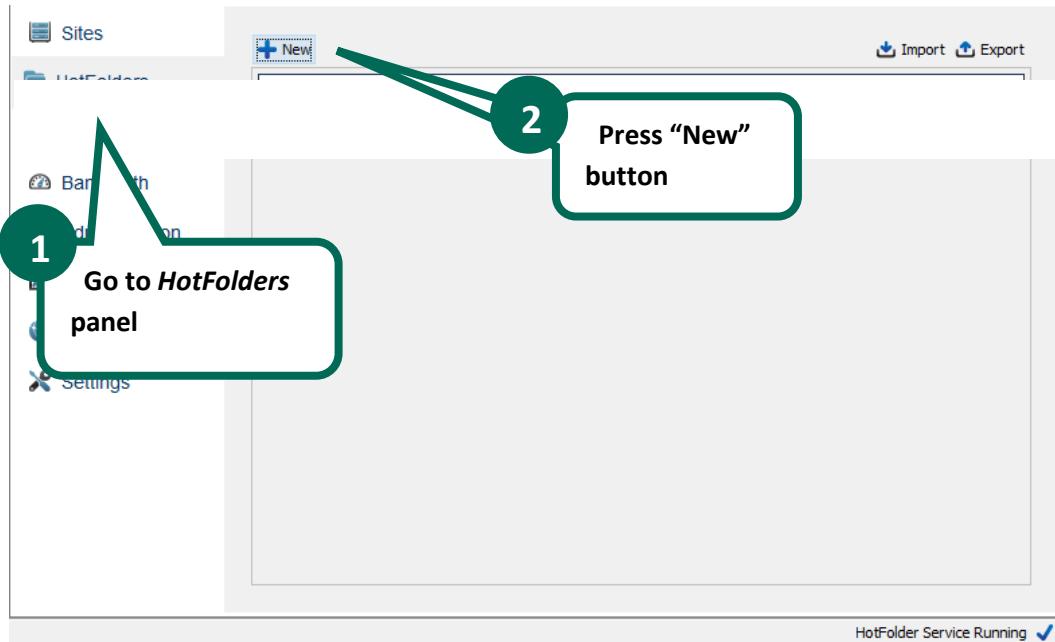




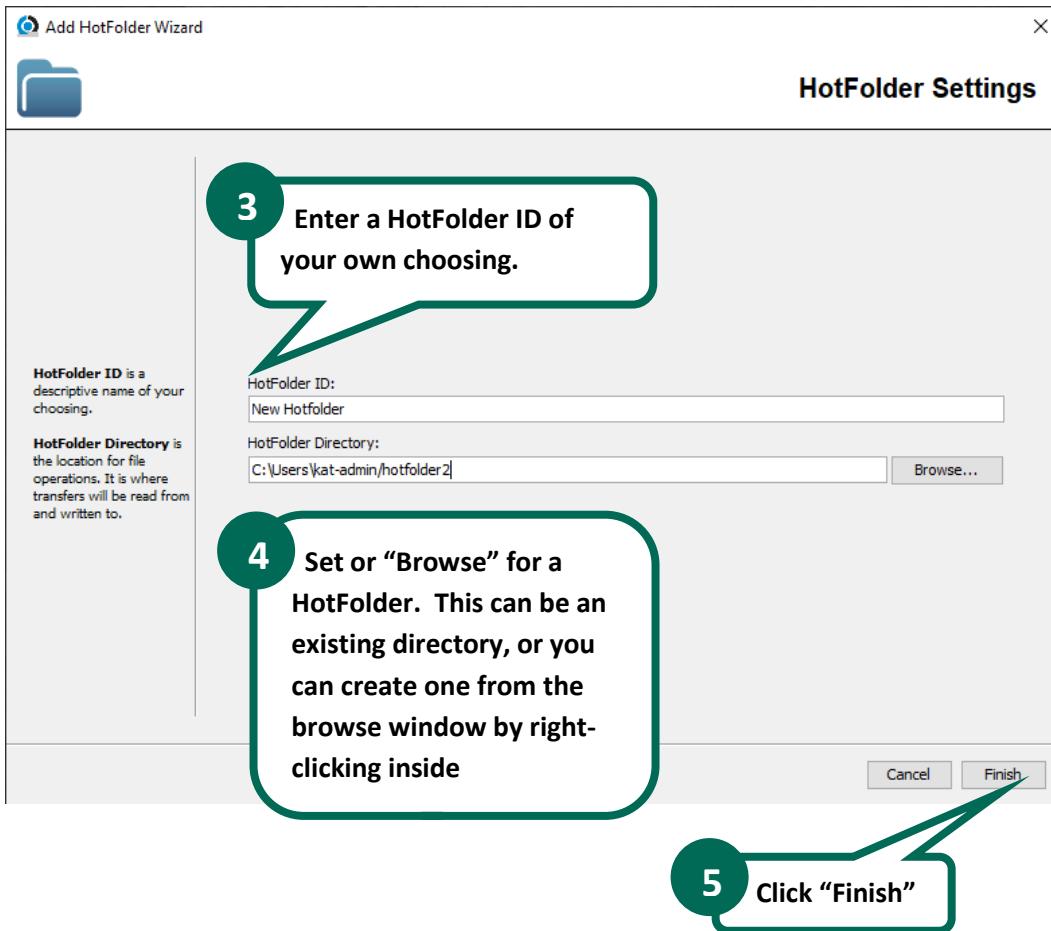
4 Define a HotFolder

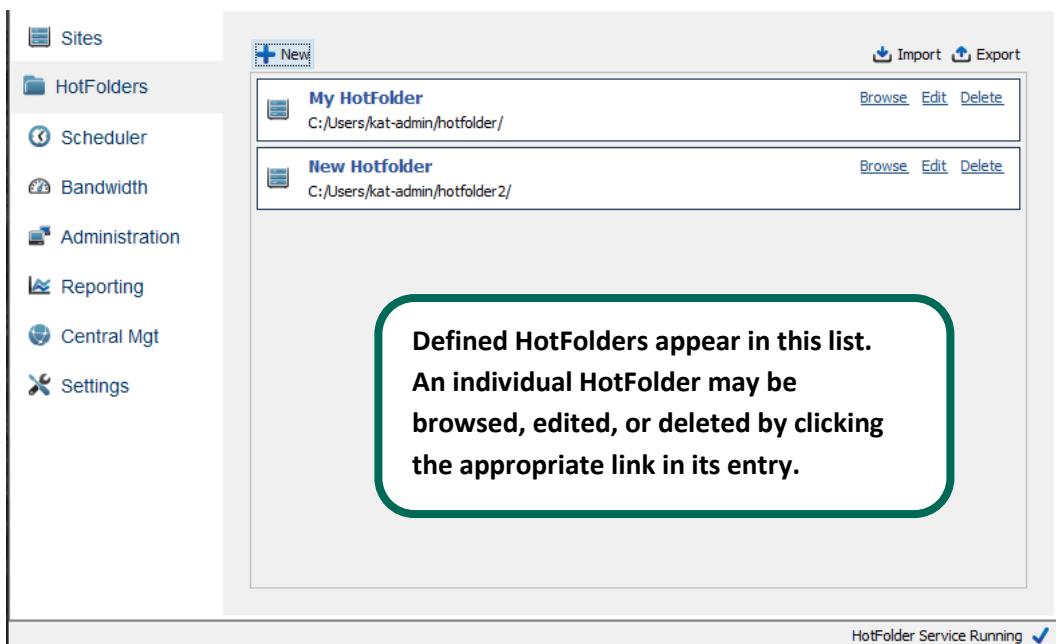
A “HotFolder” is simply any directory the user wishes to use as the source or destination for uploads and/or downloads. At least one HotFolder must be defined before a task can be created.

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:





The screenshot shows the 'HotFolders' section of the FileCatalyst interface. On the left, a sidebar lists 'Sites', 'HotFolders' (which is selected and highlighted in blue), 'Scheduler', 'Bandwidth', 'Administration', 'Reporting', 'Central Mgt', and 'Settings'. The main panel displays a list of defined HotFolders. At the top of this list is 'My HotFolder' with the path 'C:/Users/kat-admin/hotfolder/' and links for 'Browse', 'Edit', and 'Delete'. Below it is 'New Hotfolder' with the path 'C:/Users/kat-admin/hotfolder2/' and similar links. At the top of the main panel are buttons for '+ New', 'Import', and 'Export'. A callout box with a green border and black text is overlaid on the list, stating: 'Defined HotFolders appear in this list. An individual HotFolder may be browsed, edited, or deleted by clicking the appropriate link in its entry.' At the bottom right of the main panel, a status message reads 'HotFolder Service Running ✓'.

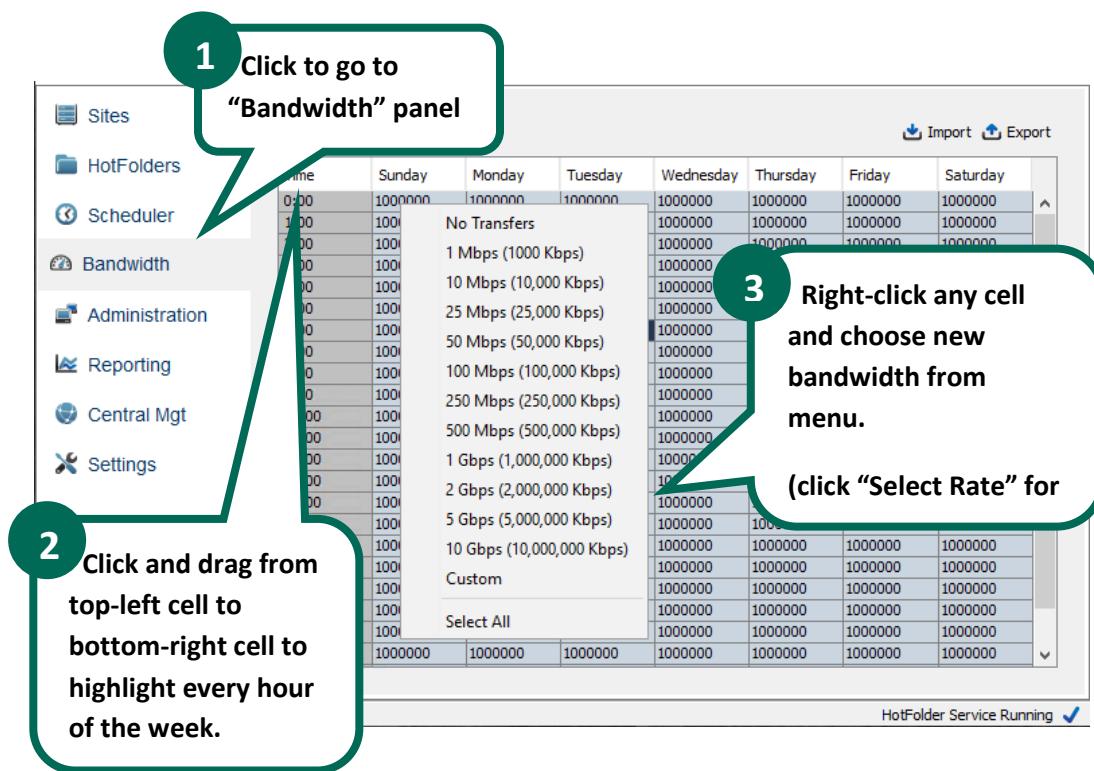
Adding a directory to the Defined HotFolders list does not modify it in any way. Saving or modifying files in the directory continues as usual and existing workflow does not need to change. By defining a HotFolder, the user is simply showing the application where to find the files for transfer.

5 Bandwidth

Although FileCatalyst Server can 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).

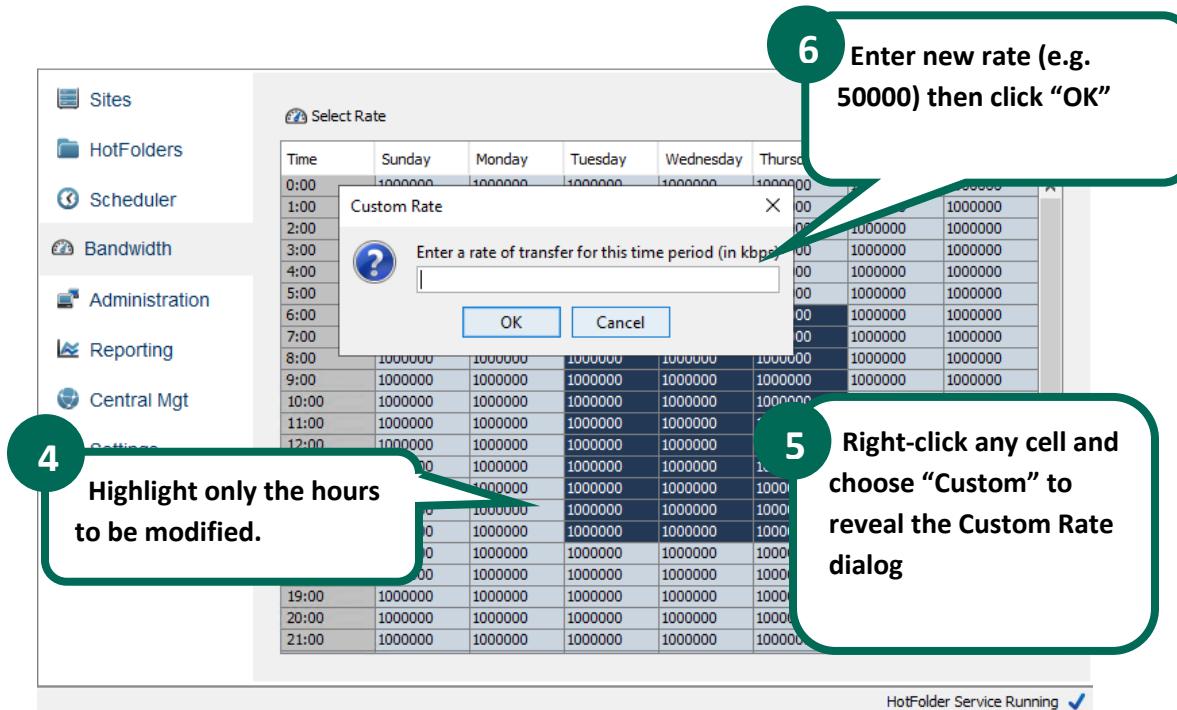
5.1 Bandwidth Scheduler

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:

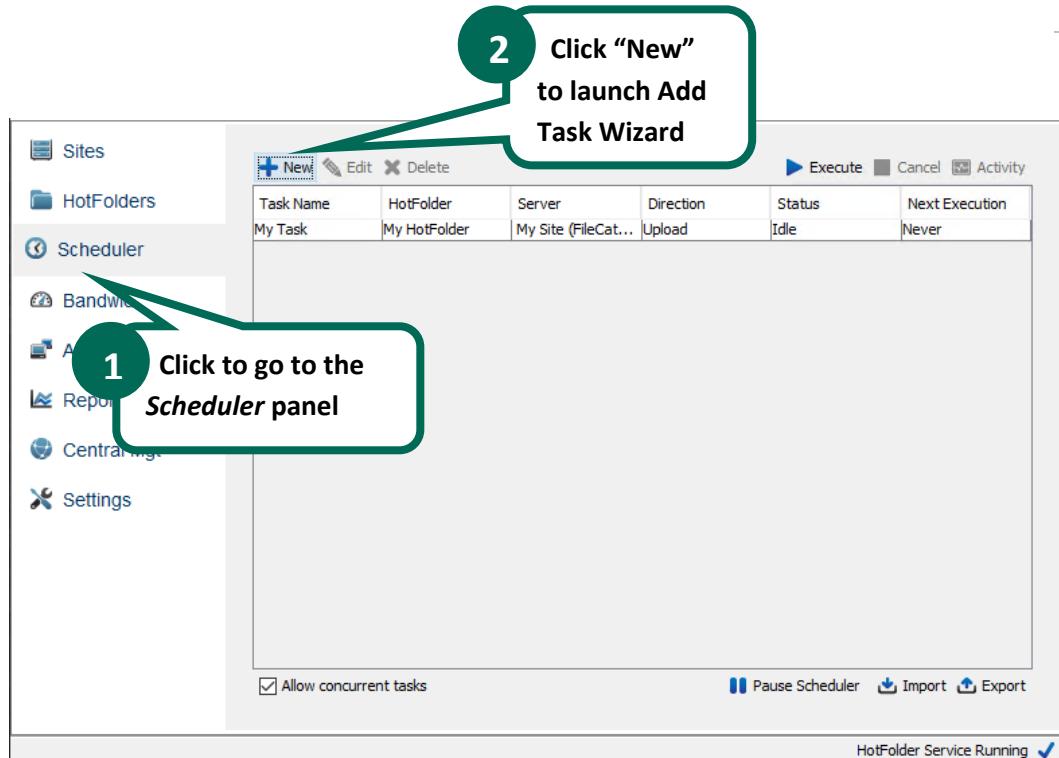


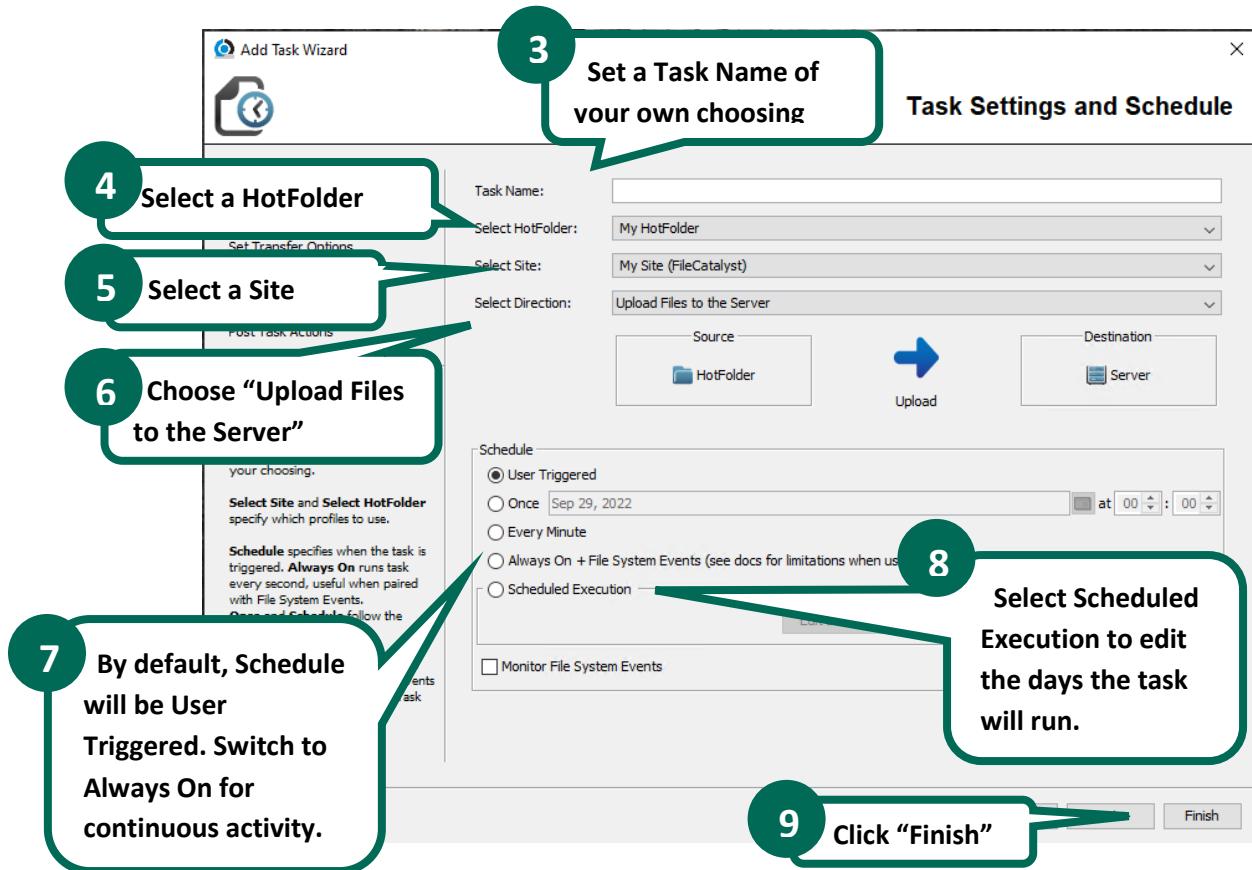
Now HotFolder will attempt to use 50,000 Kbps from 8:00 to 17:00; outside of these hours it will attempt to use 100,000 Kbps.

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.

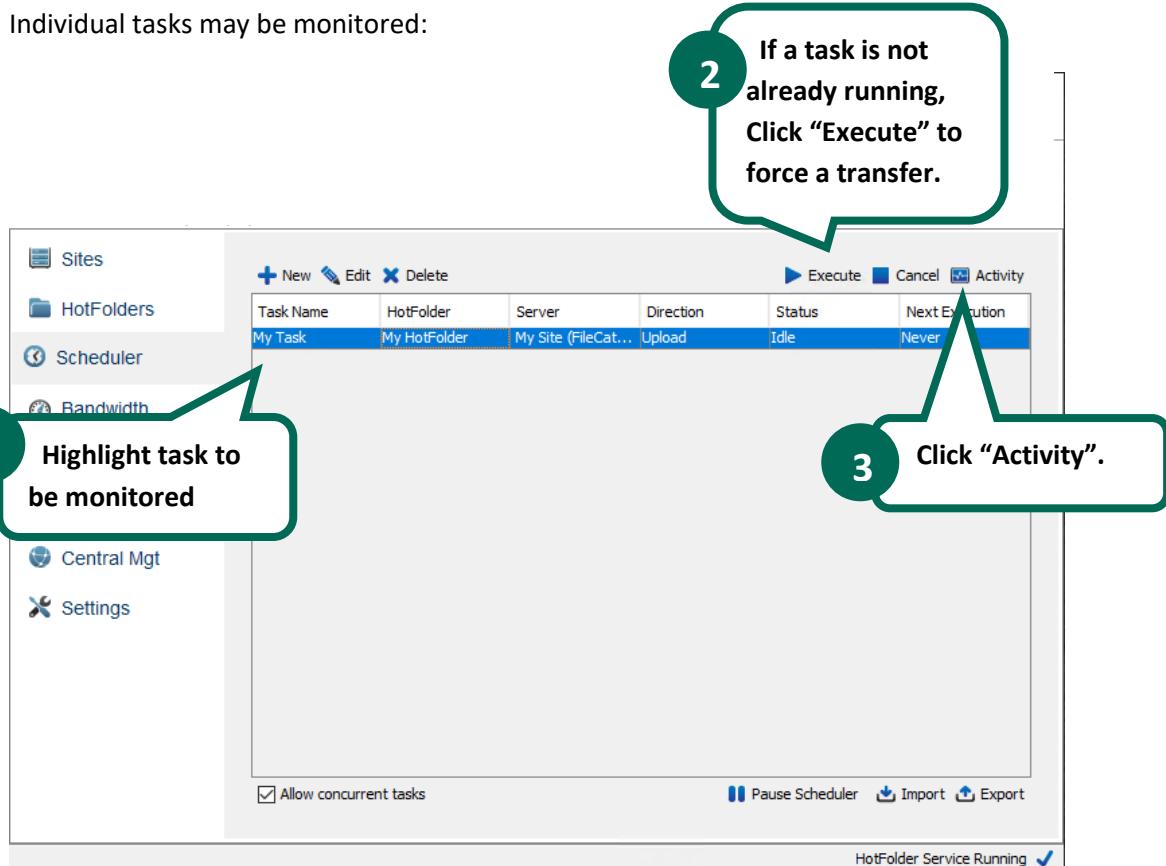
***Note:** Because the task is set to run every second, there will be near-continuous transfer activity. This may be desirable in some cases, but more often the user will enable "Incremental" transfer options (described in the user guide) which prevent the sending of files that have not changed.*

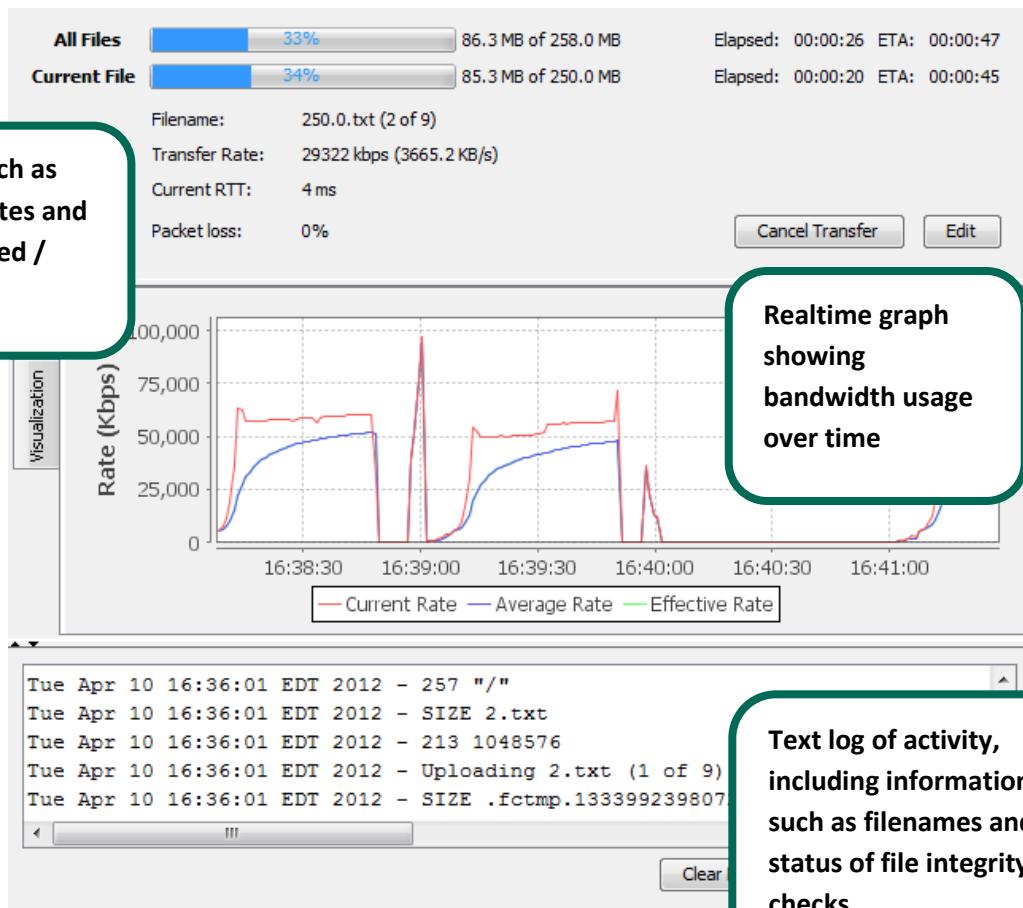
6.2 Transfer files

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

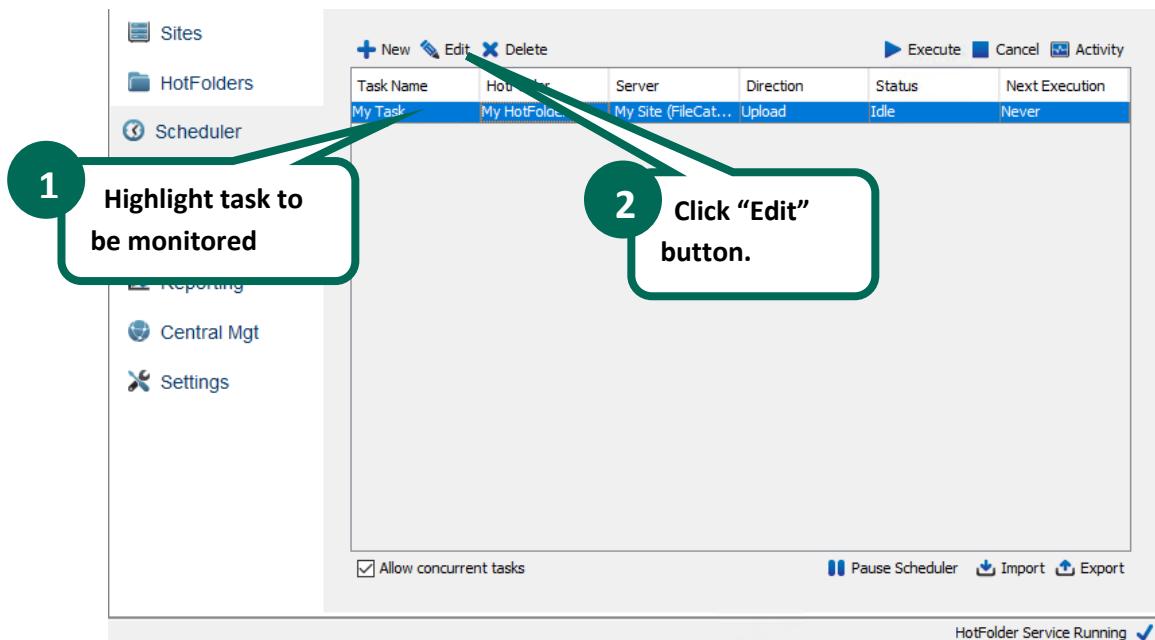
Individual tasks may be monitored:

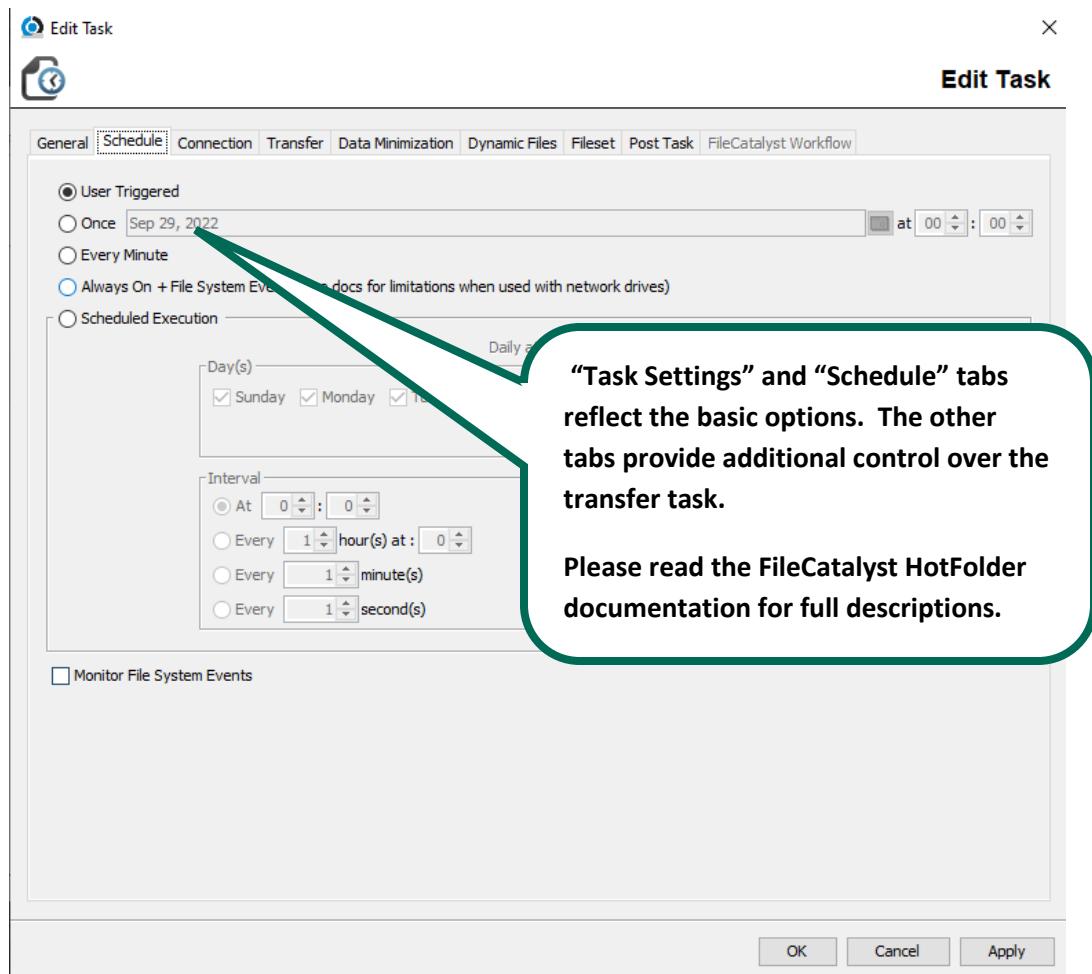




6.4 Edit a Task

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





6.4.1 Overview of Edit Task Options

Connection—Set properties such as:

- Protocol,
- Start Rate,
- Auto Resume,
- and Progressive Transfer

Transfer— Set properties such as:

- File Verification,
- Priority,
- Auto-start Transfer Activity monitor

Data Minimization—Enable

- Incremental transfers,
- Enable and adjust the level of Compression and file exclusions for compression.

Fileset—Set properties such as:

- remote folder for this transfer
- File Filter to exclude or include file types, and
- Transfer Cache settings

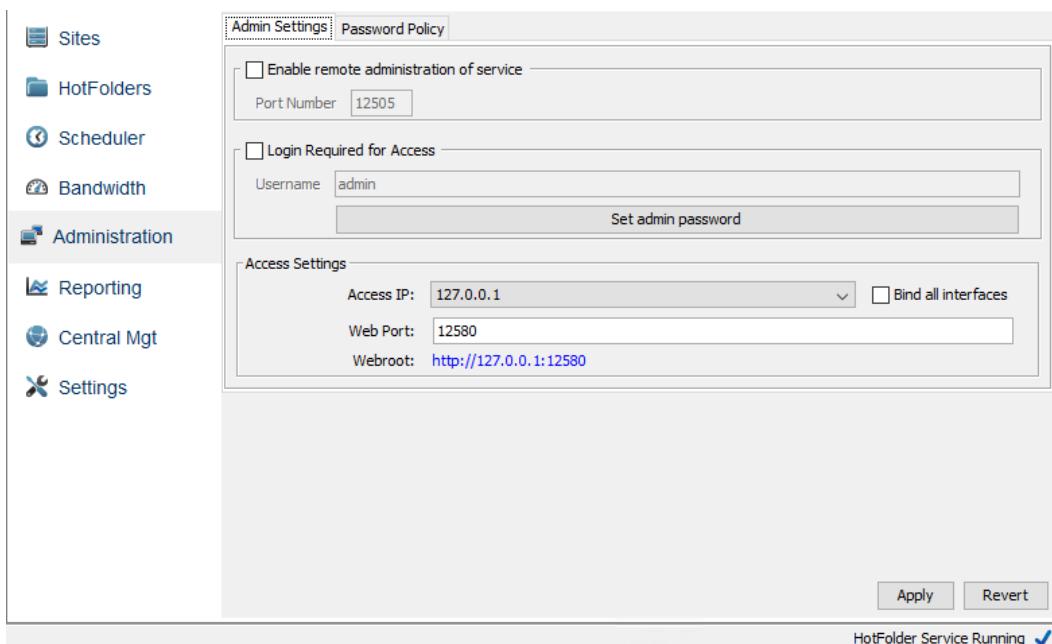
Post Task—Choose what to do with the files after transfer:

- Execute a PostURL action
- Enable and configure E-mail alerts

FC Web—Configure the FC Web integration settings

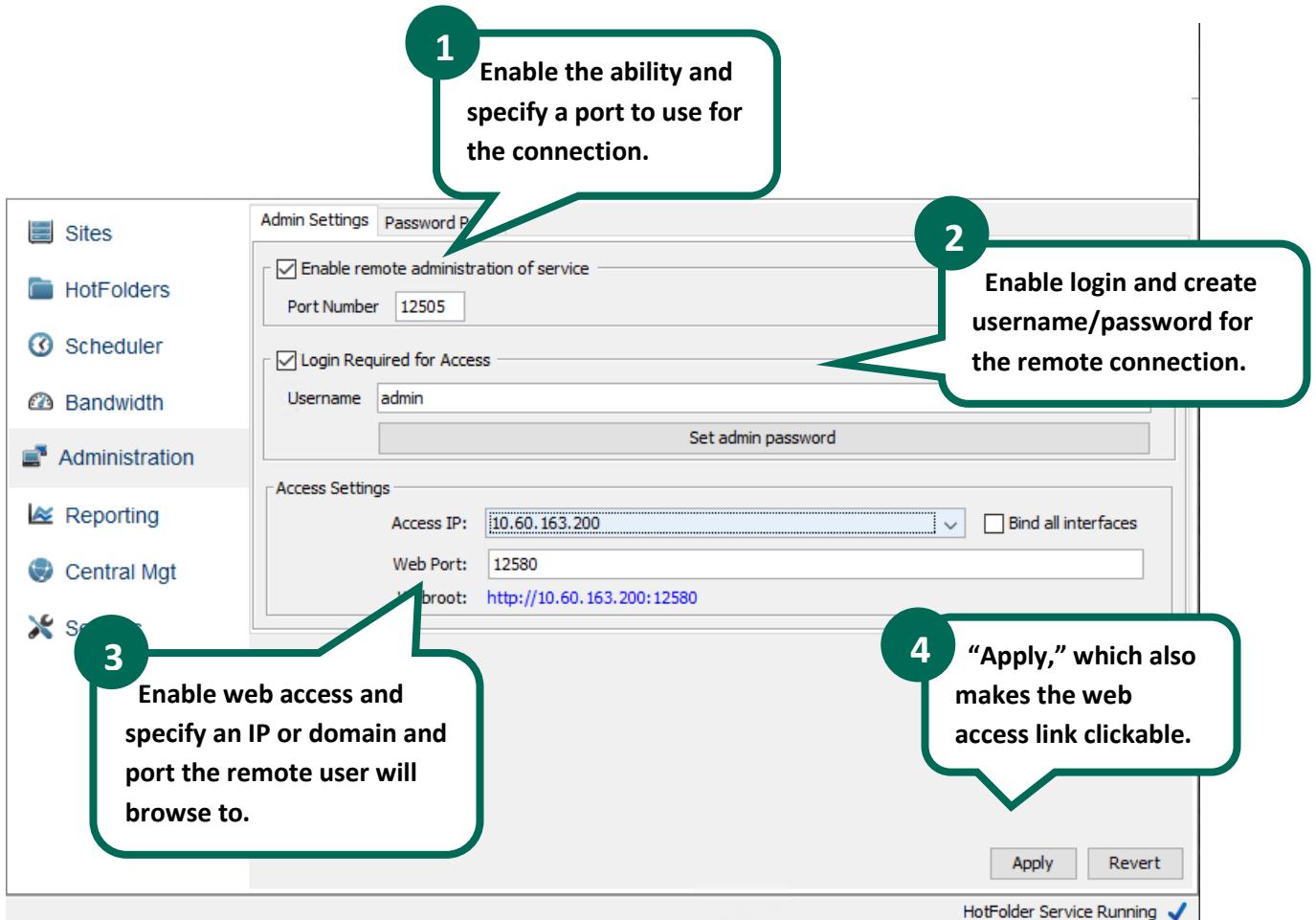
7 Remote Administration

FileCatalyst HotFolder may be administered remotely, using either a thin client or a web page. Before you can take advantage of HotFolder Admin tool, your HotFolder *must be properly configured* for remote administration.



7.1 Enable Features

Remote administration options are available 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

Looking for help? We're committed to helping you resolve any issues with your file transfer solutions so you can get back to business. If you've run into an issue, our experienced support team can quickly help you resolve it. And if you need assistance finding product downloads or manuals, we can point you in the right direction.

Available services include:

- Submitting a trouble ticket:
 - To submit a trouble ticket to our Support team, please log in to the [Customer Portal](#), click Support from the top menu bar, and Submit New Case.
- Sending an email:
 - For assistance, send an email to support.filecatalyst@helpsystems.com

You can also:

- Search the [Knowledge Base](#) for solutions to common questions
- Contact us at: +1(613) 667-2439 or +1 (877) 327-9387 (toll-free in Canada and USA)