## Overview

There are a handful of documents stored in SharePoint that we need to store in the production AEM DAM author. The documents will be extracted from SharePoint and placed on the production SFTP server for processing into the DAM, along with a metadata file describing each document.

## AEM Workflow

* The SharePoint extract script can be configured to run at any interval (likely hourly), so the workflow processing these documents into the DAM should be ready to run whenever new files are received (or at least hourly).
* As the workflow runs, it should check for the existence of a new metadata.csv file in the SFTP folder
  + If the metadata.csv file is not present, the workflow should end without processing.
* Upon receipt of a new metadata.csv file, the workflow will need to:
  + Locate and parse the metadata.csv file. This contains an inventory of all files placed in the SFTP folder.
  + Iterate over the list of files and do the following:
    - Upload the document to the DAM in the location specified by this mapping (and let’s make sure this is flexible, so we can easily add new libraries/locations in the future. Would it be easiest to just place this mapping in the jcr?)

|  |  |
| --- | --- |
| CSV – Library Column | DAM Location |
| ETF Multifactor & Active | /content/dam/Sharepoint/etf-multifactor-and-active |
| ETF Multifactor Index Returns | /content/dam/Sharepoint/etf-multifactor-index-returns |
| ETF RiskGenetix | /content/dam/Sharepoint/etf-riskgenetix |
| F Shares vs. Active Mutual Funds | /content/dam/Sharepoint/f-shares-vs-active-mutual-funds |
| I Shares vs. Passive ETFs | /content/dam/Sharepoint/i-shares-vs-passive-etfs |
| I Shares vs. Active Mutual Funds | /content/dam/Sharepoint/i-shares-vs-active-mutual-funds |
| Opportunity Playbooks | /content/dam/Sharepoint/opportunity-playbooks |
| Portfolio Characteristics | /content/dam/Sharepoint/portfolio-characteristics |
| Hartford Funds Expense Sheet | /content/dam/Sharepoint/reports-notes |
| Quarterly Active Share Report | /content/dam/Sharepoint/quarterly-active-share-report |
| Morningstar Analyst Reports | /content/dam/Sharepoint/morningstar-analyst-reports |
| Due Diligence Notes | /content/dam/Sharepoint/due-diligence-think-tank-notes |
| Fund Summaries | /content/dam/Sharepoint/fund-summaries |
| ETF Summaries | /content/dam/Sharepoint/etf-summaries |
| ICG Weekly Insights | /content/dam/Sharepoint/icg-weekly-insights |

* + - If a document currently exist with the same name, that document should be updated and versioned.
    - The documents should be automatically published.
    - Tag the document to the appropriate fund(s), based on the WebID column in the metadata file.
      * There could be multiple values in the WebID column separated by a semi-colon. The document should be tagged to all funds identified by this column.
      * The tags are in the format of: thf:products/funds/**[WebID]** Or: thf/products/etfs/**[WebID]**
      * If the WebID column is NULL, no tags are needed
      * If no matching tag is found for a WebID, no action is needed. Skip that tag.
    - The following additional metadata needs to be mapped to the document in the DAM

|  |  |
| --- | --- |
| CSV Field | DAM Metadata |
| File | Name |
| File (without the file extension) | PieceCode |
| FileName | Title |
| Modified | RevisionDate |

* There is no need to archive these documents.
* The workflow should gracefully handle any errors without failing the entire job:
* If the metadata.csv file list a document that cannot be found in the SFTP folder:
* Email the error to: [MFWebDataAlerts@hartfordfunds.com](mailto:MFWebDataAlerts@hartfordfunds.com)
* Move on to the next document in the list.
* If a file fails to load for any reason:
* Move the file to an /error folder
* Email the error to: [MFWebDataAlerts@hartfordfunds.com](mailto:MFWebDataAlerts@hartfordfunds.com)
* Move on to the next document in the list.