Balance Point Technologies, Inc.
www.maxtoolkit.com

Document Manager

User Guide

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Contents

Application Overview 4
Minimum System Requirements 5
Installing Document Manager........ 6
Configuring Document Manager Service 15
Email........ 16
Always send error email to the following recipients 17
Other 18
SQL Report Server 19
Authentication 20
Company Information 21
Database Connections 22
Database Tables 24
Closing the Settings Dialog........ 24
Using Document Manager 25
Maintenance Configuration 28
Components Configuration........ 29
Data Content........ 29
Testing Document Data Associations 38
Recipient Template 40
Notifications........ 46
Scheduler 48
Document Export 51
Summary Section 55
Help Section 56

Application Overview

Document Manager is a flexible application that is capable of but not limited to the following features:

- Connect to any available sql database.
- Create a Document Manager document and associate the document with the database by assigning user defined table mappings, database fields, query conditions, grouping and ordering.
- Auto update fields in the database after a document has been processed.
- Create Process Templates that are assigned to recipients. Each process template allows the user to select the email attachments, the delivery of the document and the format of the email message.
- Specify the recipients of each one of the documents by assigning rules which target database tables to retrieve email addresses.
- Specify specific sender of each one of the email messages to professionally appear before the customer.
- Assign a list of recipients that will be notified in case of a reply to the original document message.
- Schedule tasks that will be automatically processing documents to speed up processing times and minimize errors.
- Export database content to an XML file that could be saved to a disk location, included with the original email message or saved on an FTP location.
- Resend or reprint already processed document.

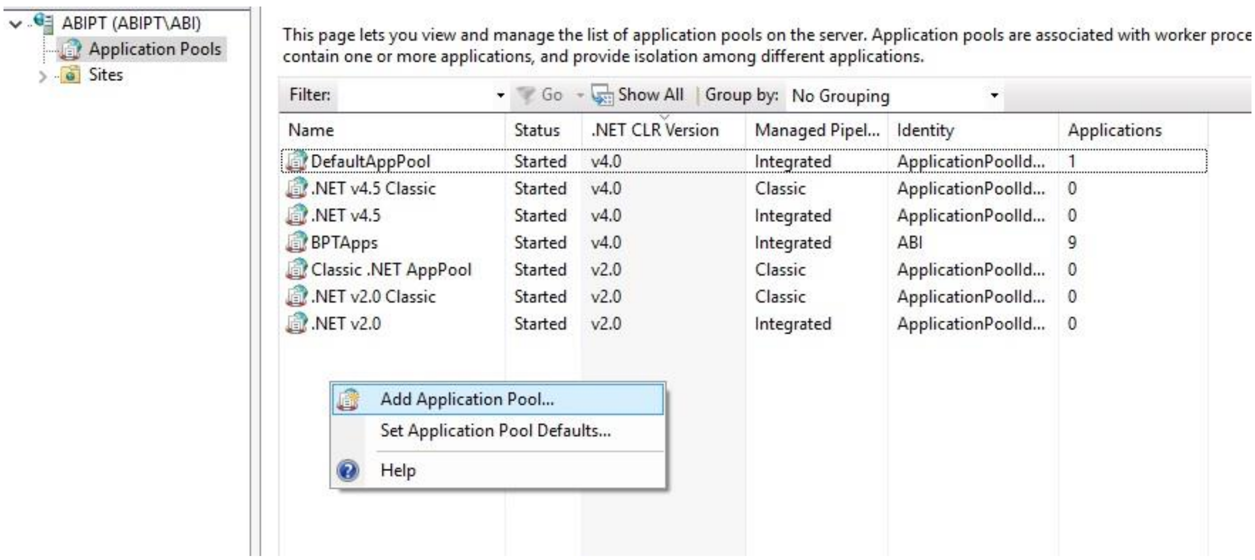
Minimum System Requirements

Operating System	Windows Server 2008
.NET Framework	4.5
SQL Server	2008 R2
SQL User and Password	The user must be a member of the public and sysadmins roles in SQL Server and must be able to add, delete, and update database records.
SQL Server Reporting Services (SSRS)	required
SSRS Report Viewer	required
IIS	7.0
ASP.NET	4.0 installed and enabled
MSMQ	required
Email Server	required
Internet Connection	required
Windows User Account	The provided windows user account should be a domain administrator and it should have full access to the installed printers, MSMQ, SSRS and full control to the installation folder of the Document Manager Service (C:\Program Files (x86)\Balance Point Technologies\Document Manager Service)

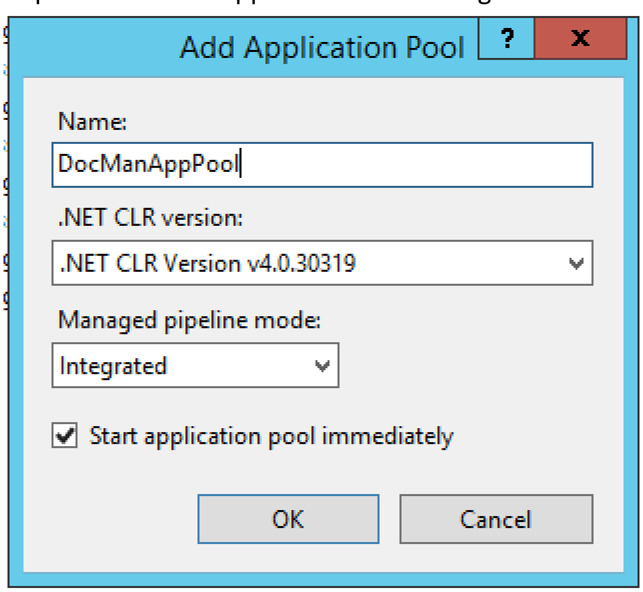
Installing Document Manager

The Document Manager should be a one-time installation on a central server location. After a proper installation and configuration, the Document Manager can be accessible through a web browser by multiple users.

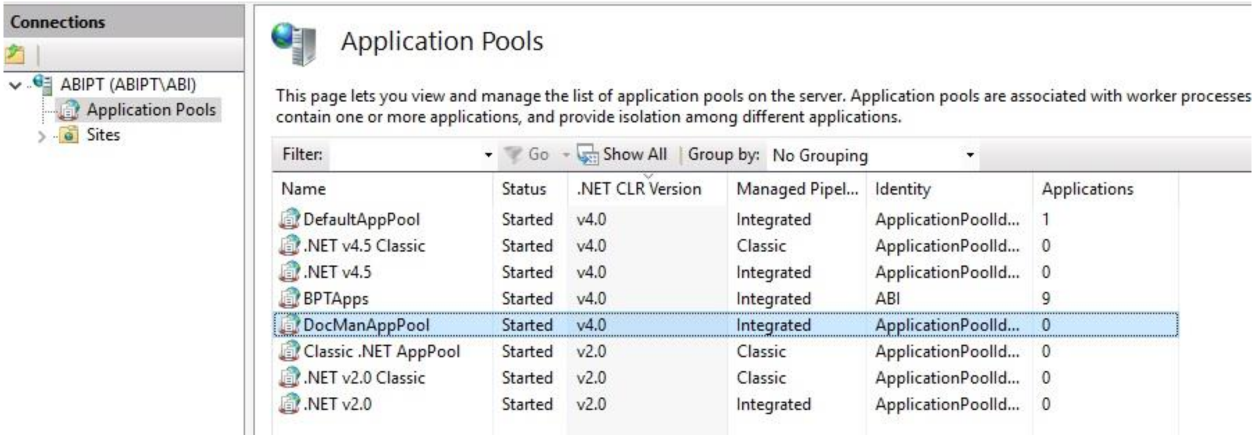
- Start by configuring an IIS application Pool.
  - To start the IIS Manager, navigate to Control Panel - > Administrative Tools - > Internet Information Services (IIS) Manager
  - Expand the main node and click on Application Pools
  - Right click in the Application Pools details section and select Add Application pool from the dropdown menu.



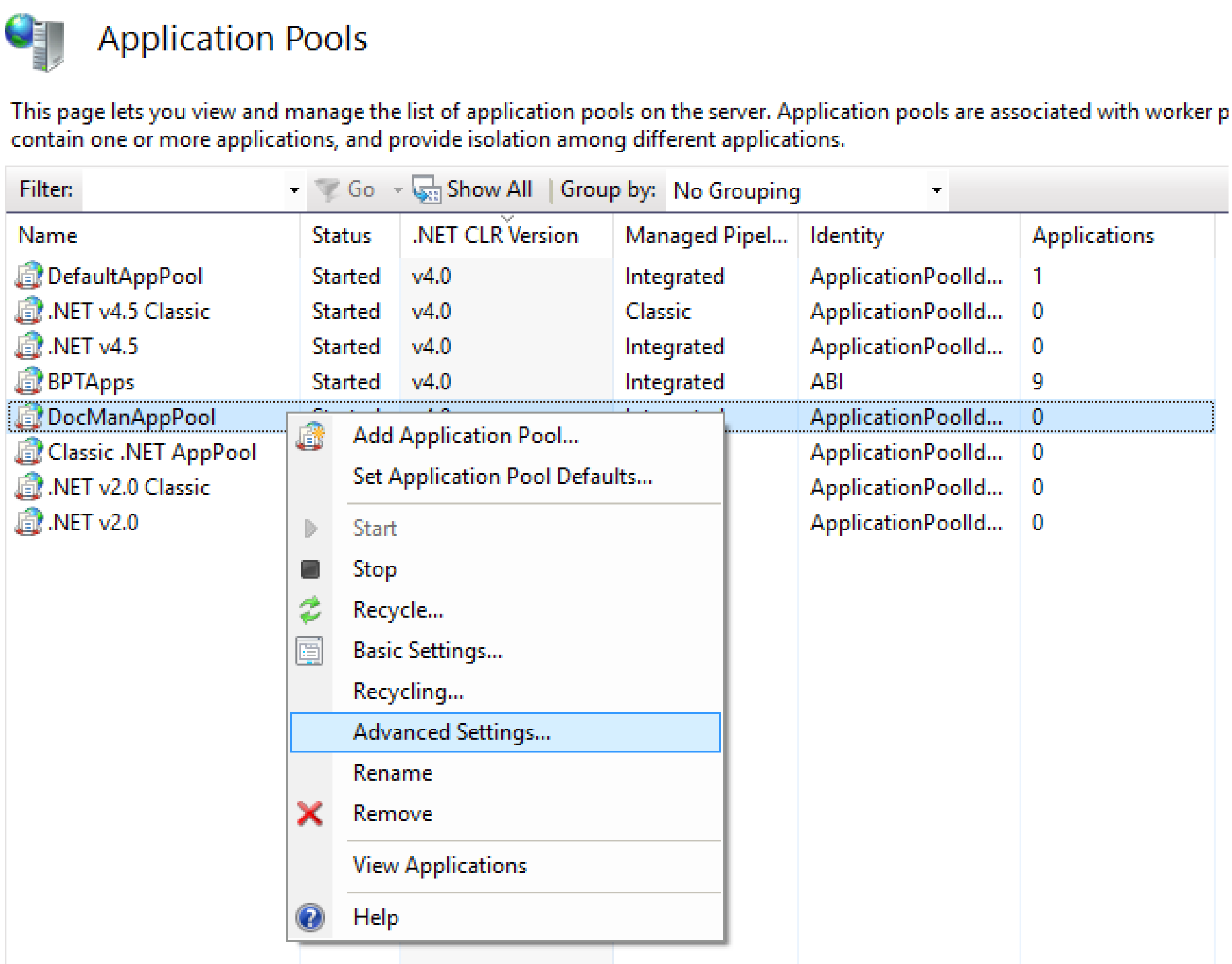
- Populate the Add Application Pool dialog as shown in the image below and click OK.



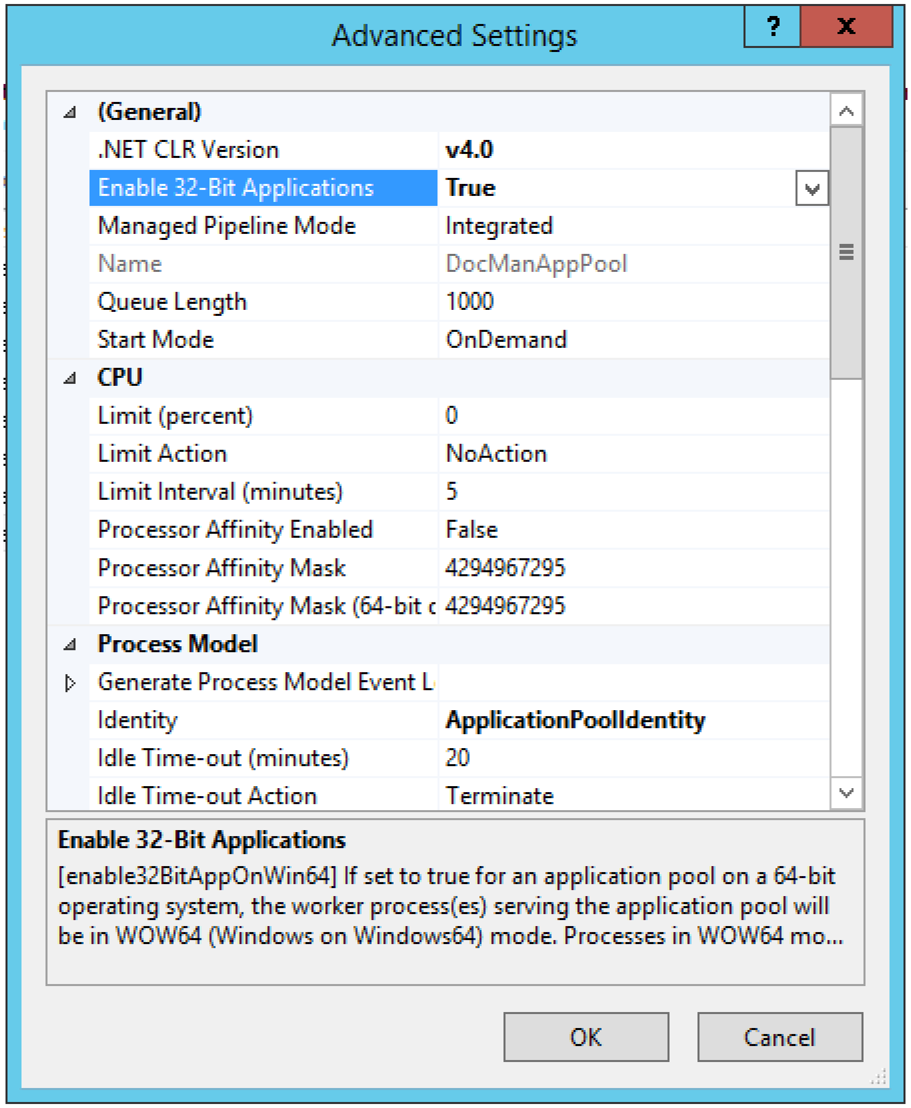
- The DocManAppPool is now added to the list of available application pools



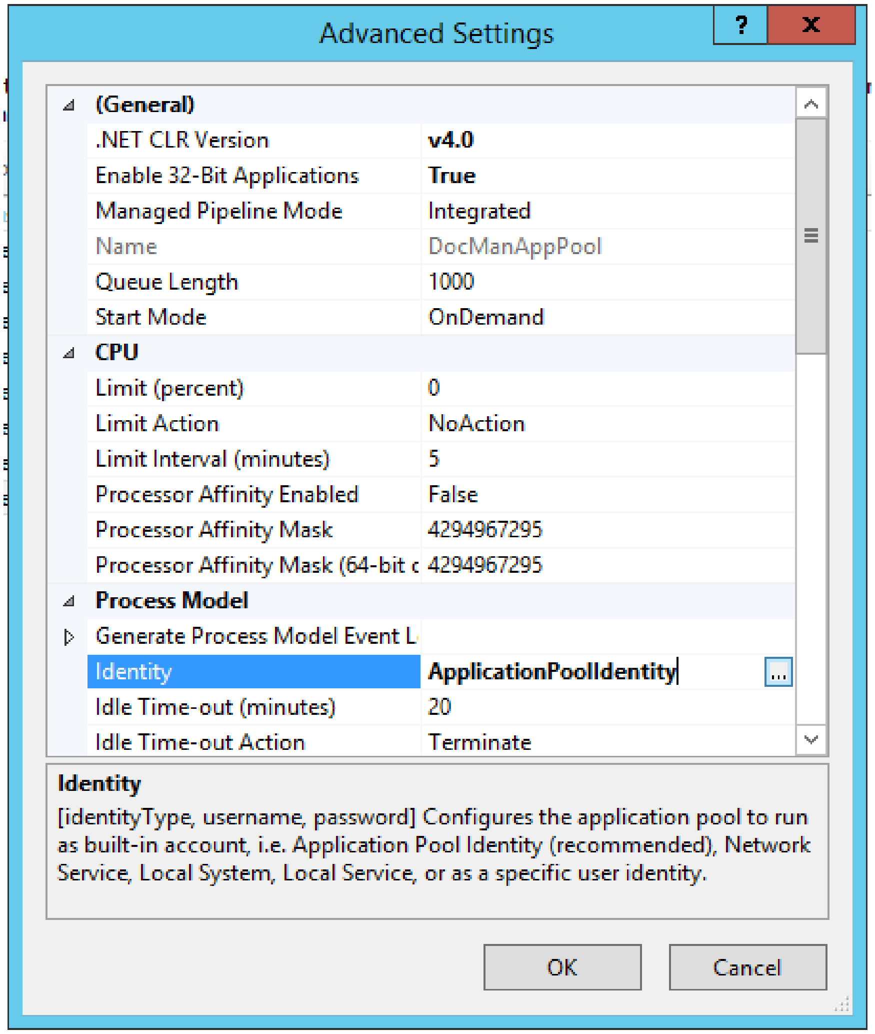
- Right click on the DocManAppPool and select Advanced Settings from the menu



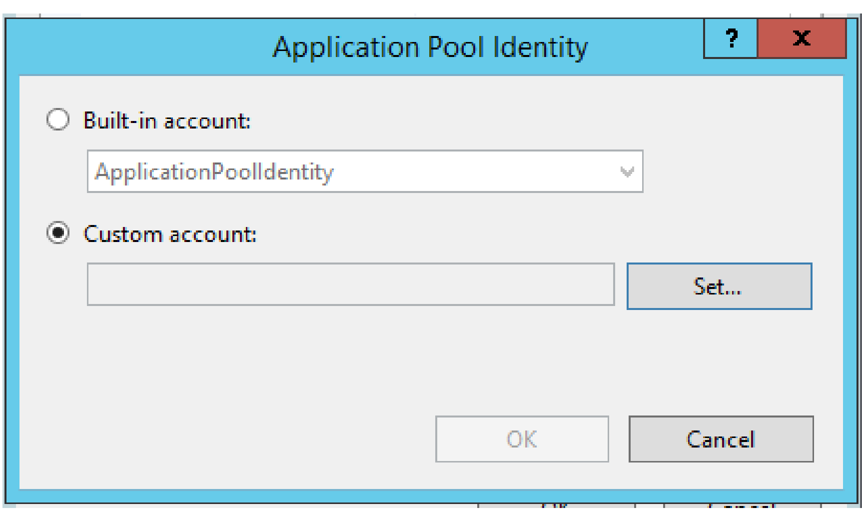
- Change the value of Enable 32-Bit Applications to True



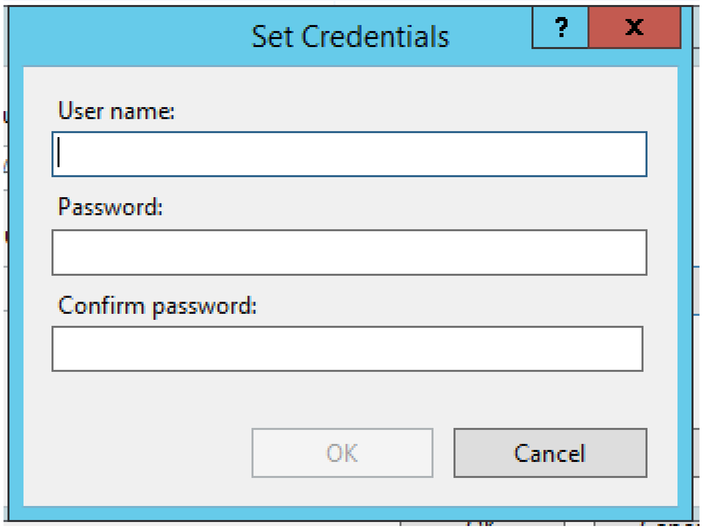
- Click on the Application Pool Identity browse button



- Check the Custom account option



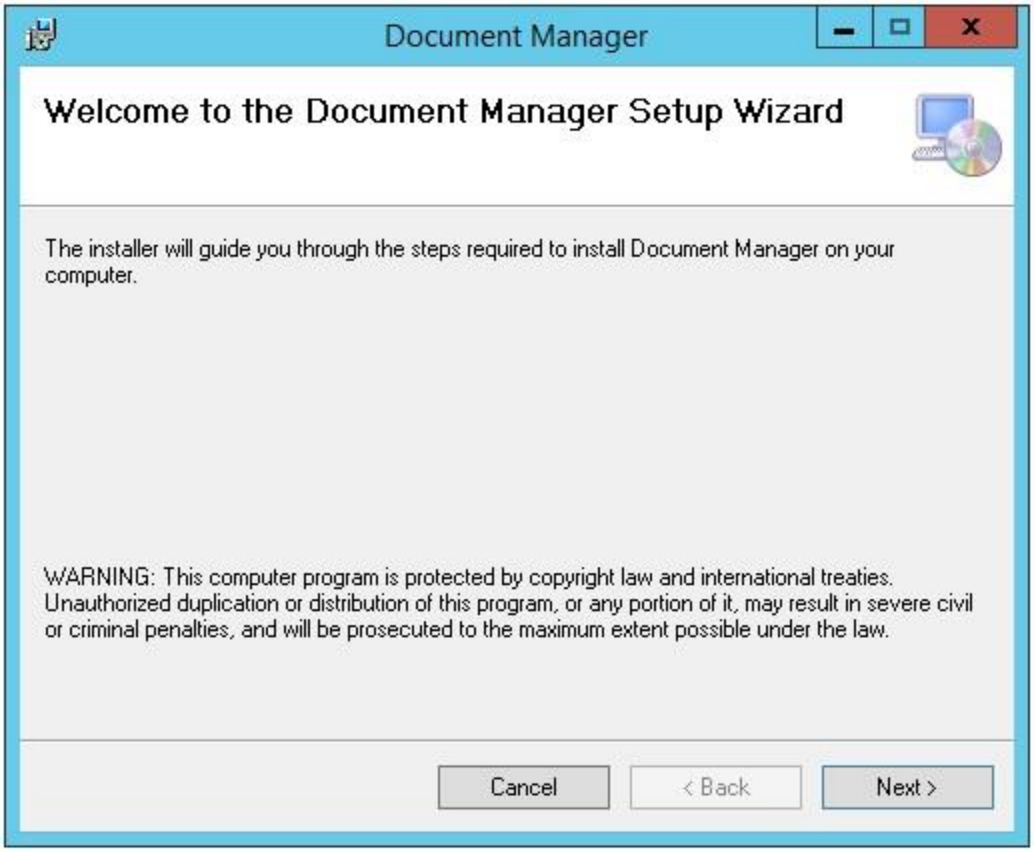
- Click the Set button
- Specify the windows account credentials that will be used by the DocManAppPool. The specified windows account must have the following privileges:
  - Access to locally installed printers on the current server
  - Access to the SSRS Reports folder of Document Manager
  - Full Control over the MSMQ (Microsoft Messaging Queue)



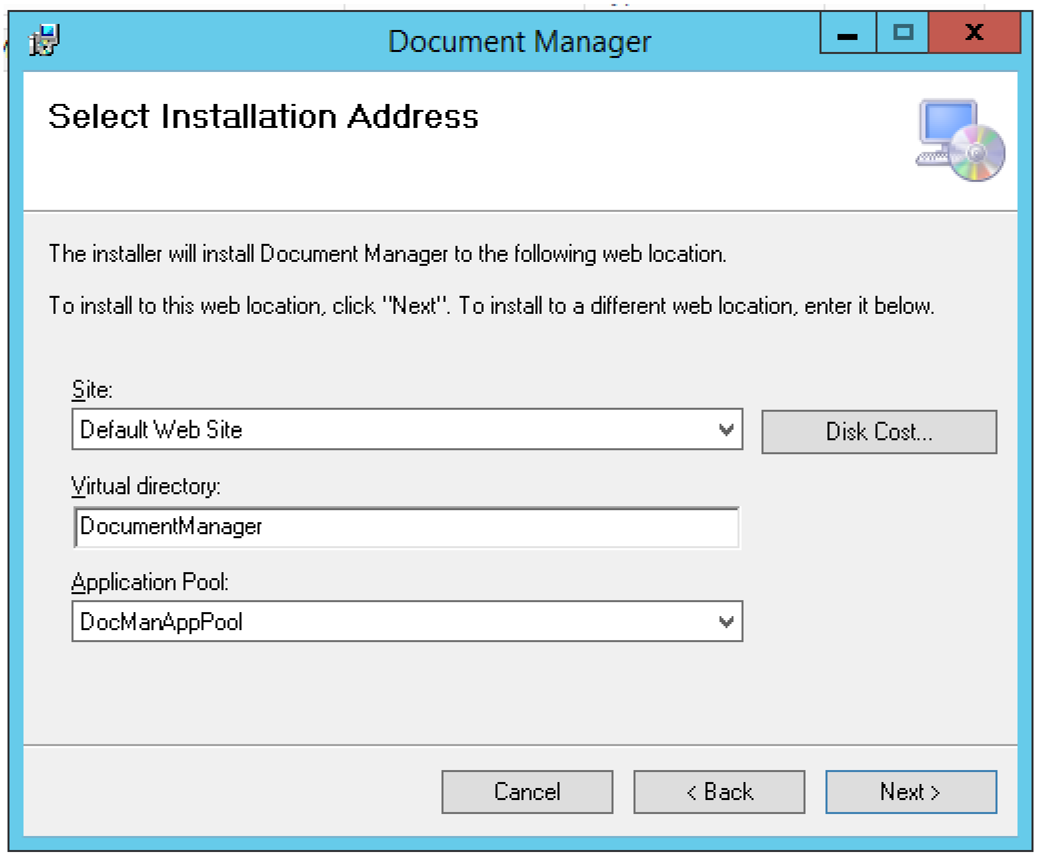
- After specifying the appropriate credentials, click OK to close the Set Credential dialog
- Click OK to close the Application Pool Identity dialog
- Click OK to close the Advanced Settings dialog

Document Manager

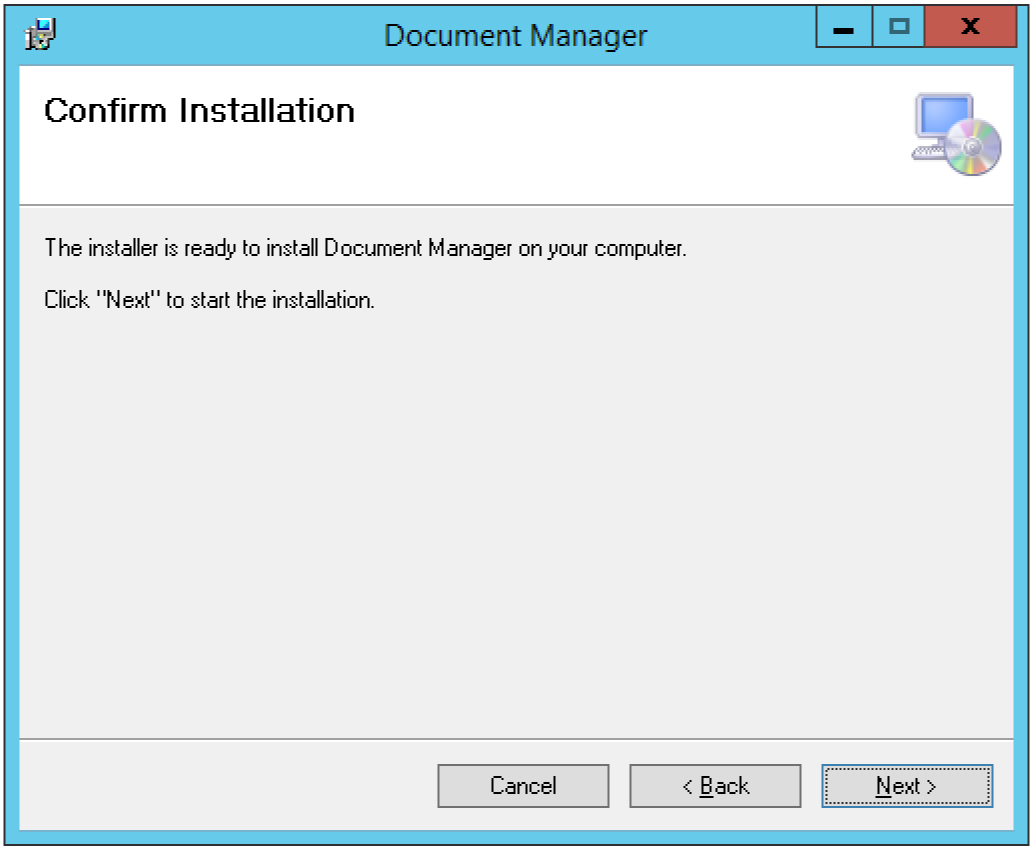
- Continue with the installation of Document Manager by running the provided installer
- Click Next on the welcome screen



- On the Installation Address Selection screen:
- Specify the Site the Document Manager will be installed on. The Default Web Site is the default site where Document Manager could be installed. However, if the Document Manager is supposed to be installed on a different web site, specify it by selecting the site form the Site dropdown.
- Leave the Virtual Directory as DocumentManager
- Select DocManAppPool from the Application Pool dropdown
- Click Next

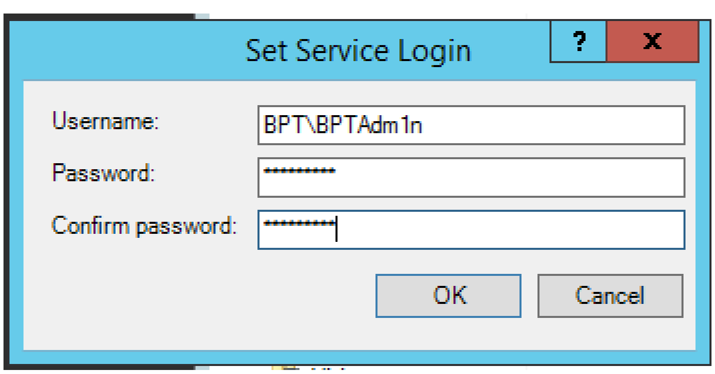


- Click Next on the Confirm Installation window.



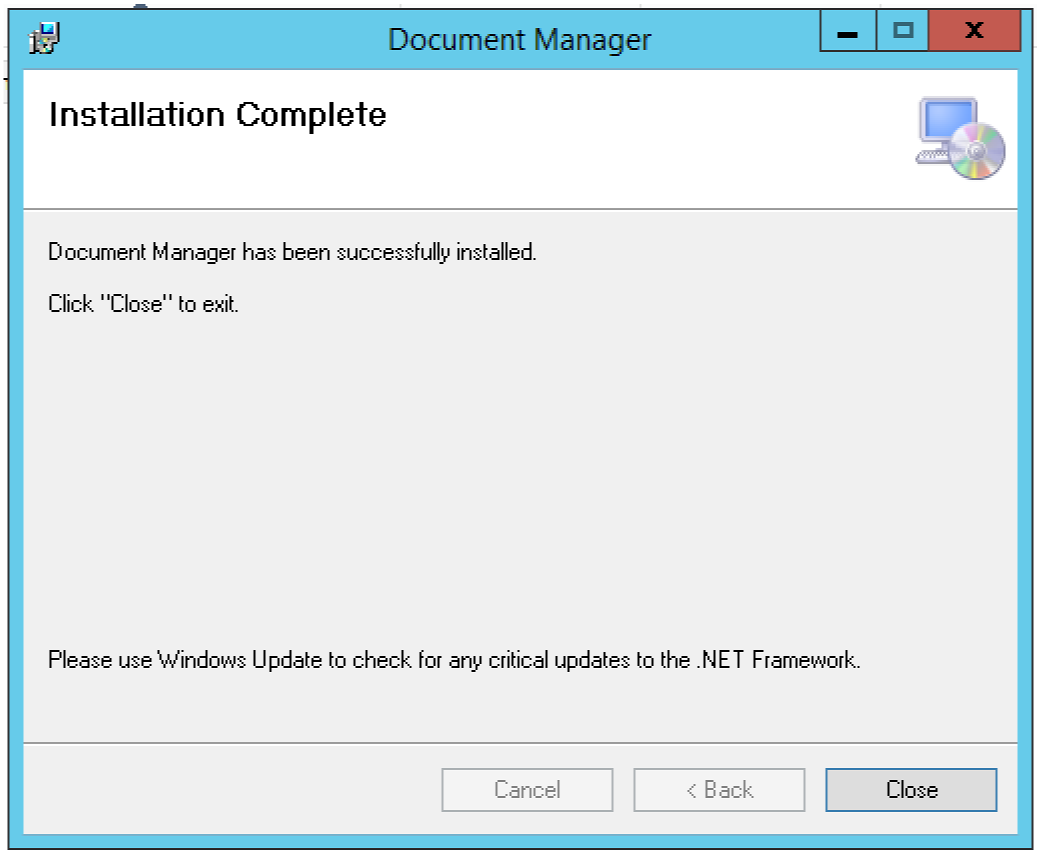
- The installation of Document Manager begins
- Specify the windows account credentials that will be used by the Document Manager service. The specified windows account must have the following privileges:

- Full Control over the installation folder of Document Manager service (C:\Program Files (x86)\Balance Point Technologies\Document Manager Service)
- Access to locally installed printers on the current server
- Access to the SSRS Reports folder of Document Manager
- Full Control over the MSMQ (Microsoft Messaging Queue)



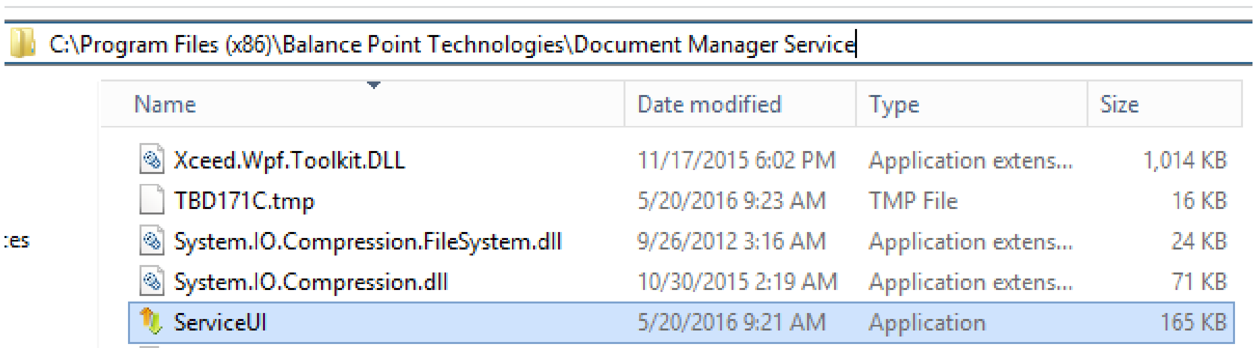
- After specifying the appropriate credentials, click OK to continue.

- Close the final installation window

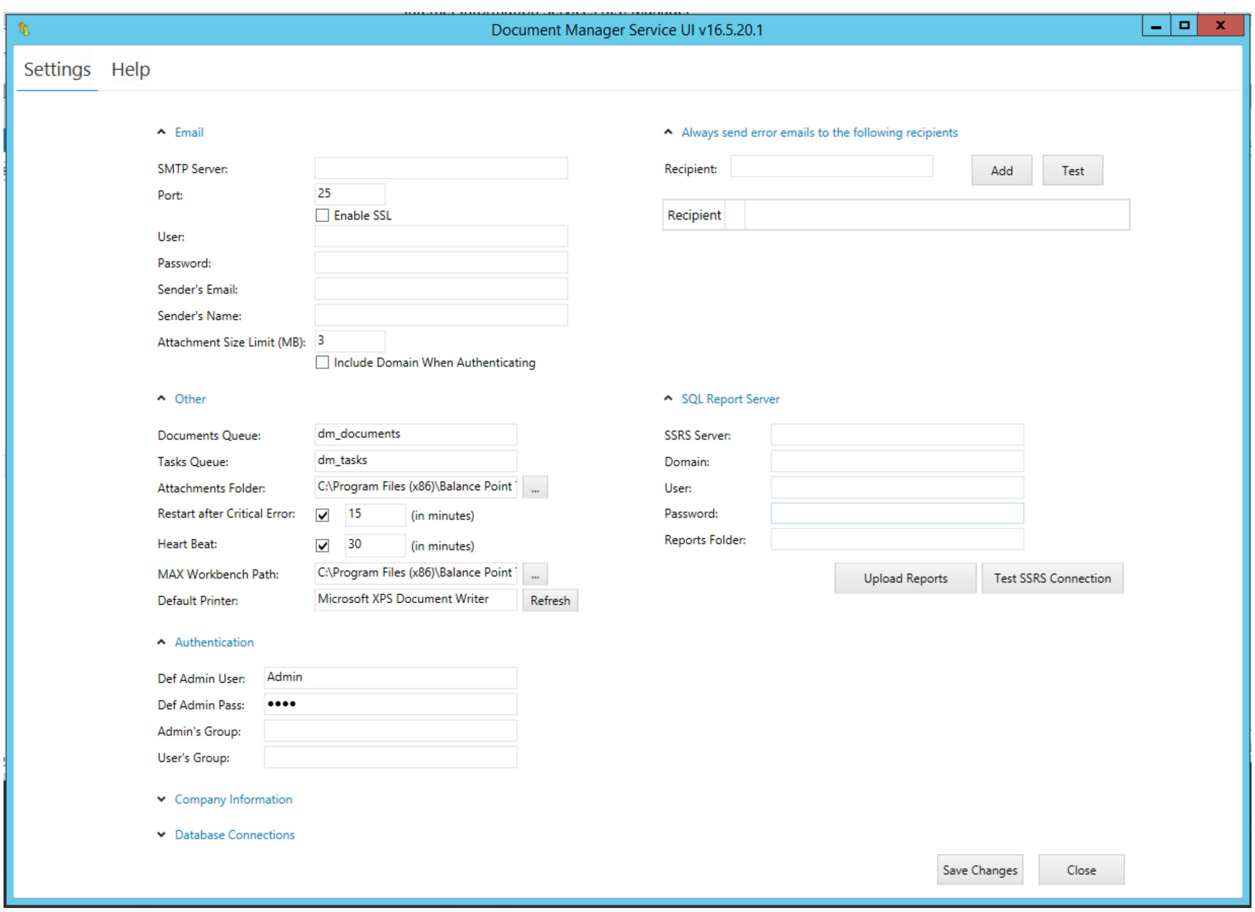


Configuring Document Manager Service

- Navigate to the installation folder of Document Manager Service. The default and preferable location is C:\Program Files (x86)\Balance Point Technologies\Document Manager Service.

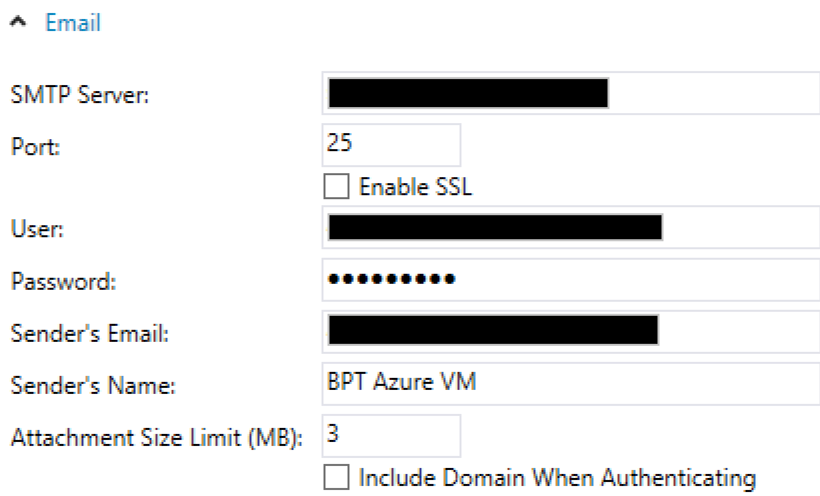


- Double click on ServiceUI.exe to launch the configuration dialog



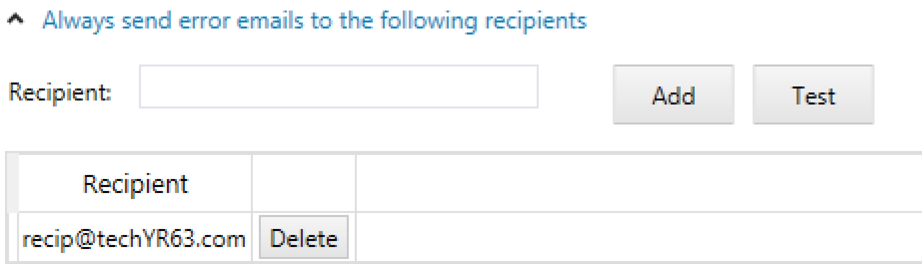
- Keep in mind that all mandatory settings must be configured before saving the changes. Sending test email messages, uploading reports to SSRS Server and testing the connection to the SSRS server are not allowed until the settings have been successfully saved.

Email



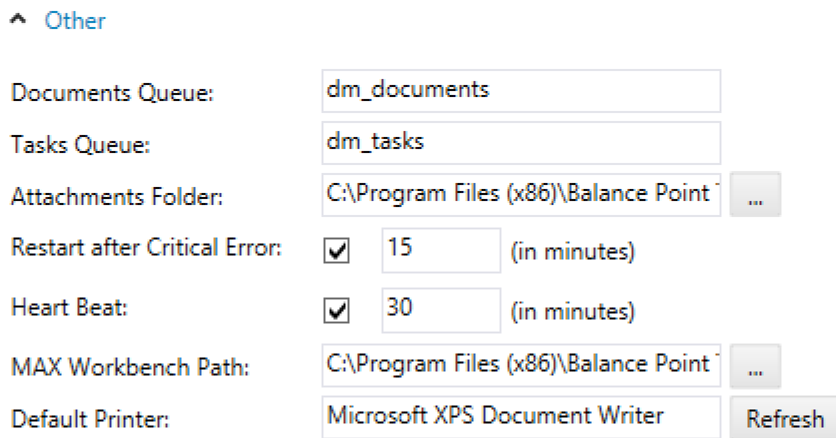
Setting	Mandatory	Description
SMTP Server	Y	Email Server that will be used to send email messages.
Port	Y	Port that will be used to send email messages.
Enable SSL	Y/N	Enables the Secured Socket Layer. The value depends on the specified email server.
User & Password	Y	Must be an actual email account configured in the specified email server. Will be used to login to the email server and send messages.
Sender's Email	Y	The email address that will be displayed to the recipient of the messages.
Sender's Name	Y	The name that will be displayed to the recipient of the messages.
Attachment Size Limit	Y	The default value is 3MB. The value should be set to a size that is acceptable by the specified email server.
Include Domain When Authenticating	N	The value depends on the configuration of the email server. It is preferable to leave it unchecked, test sending an email and if needed check it.

Always send error email to the following recipients



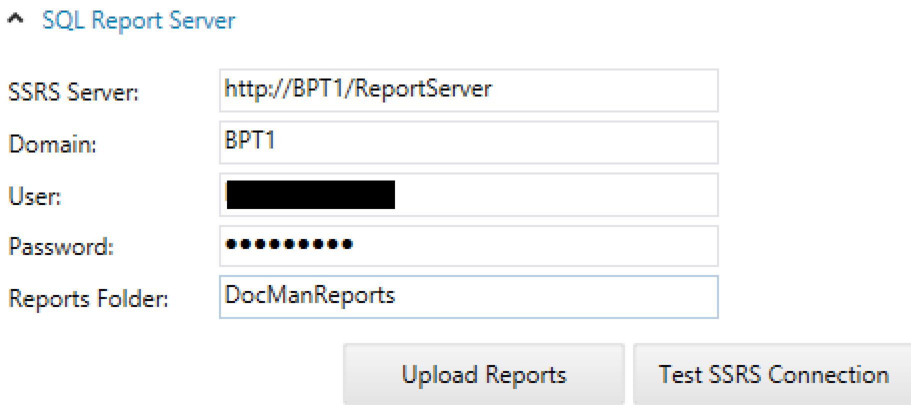
- This section is used to build a list of recipients that will be receiving error messages from Document Manager Service
- Enter the email address of a recipient and click Add to add the recipients to the list

Other



Setting	Mandatory	Description
Documents Queue	Y	Used by the Document Manager to process pending records. It will be created as part of the local MSMQ.
Tasks Queue	Y	The Documents Queue is the queue that will be used by the Document Manager to process pending records. It will be created as part of the local MSMQ.
Attachments Folder	Y	The location where additional email attachments will be stored.
Restart after Critical Error	N	Used by Document Manager to decide after what period of time to automatically restart the processing in case a critical service error has occurred.
Heart Beat	N	Used to periodically send emails to report that the service is operational.
MAX Workbench Path	Y	The installation path to MAX Workbench
Default Printer	N	It specifies the name of the default printer on the local system.

SQL Report Server

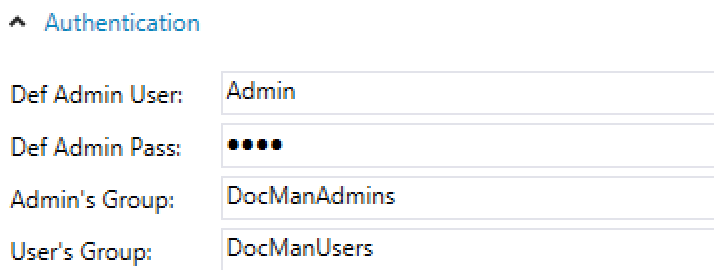


- The specified user account must have full control over the specified reports folder

Setting	Mandatory	Description
SSRS Server	Y	SSRS Server containing reports that will be used by Document Manager.
Domain	Y	Current domain name.
User	Y	User used to login to the SSRS Server.
Password	Y	Password used to login to the SSRS Server.
Report Folder	Y	A folder on the specified SSRS Server containing the reports that will be used by Document Manager.

- Upload Reports button allows a convenient way of uploading multiple reports to the SSRS Server
- Test SSRS Connection is used to test the connection to the specified server

Authentication



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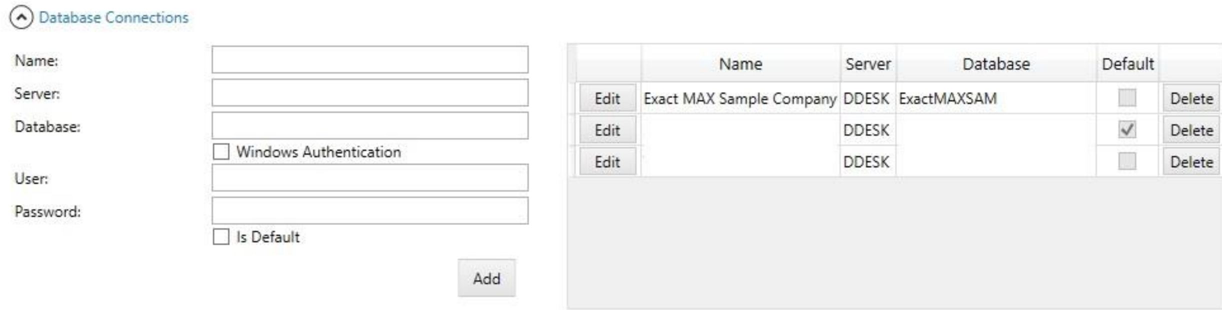
Setting	Mandatory	Description
Def Admin User	Y	The default built in admin user name.
Def Admin Pass	Y	The password for the built in admin account.
Admin's Group	N	Specifies the group in Active Directory that will contain all users who will have admin privileges while logged in to Document Manager Web Interface.
User's Group	N	Specifies the group in Active Directory that will contain all users who will be able to login to Document Manager Web Interface and use the Manual Processing screen. User in this group will not have admin privileges.

Company Information

- The Company Information section is used to specify information about the current company using Document Manager. The specified information could be used on reports used by Document Manager

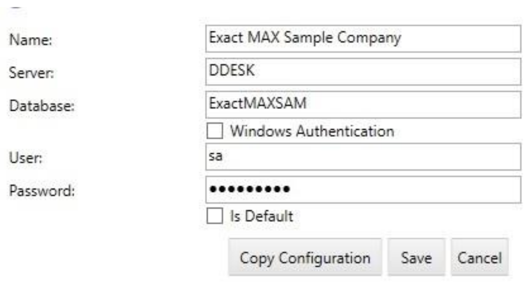
Database Connections

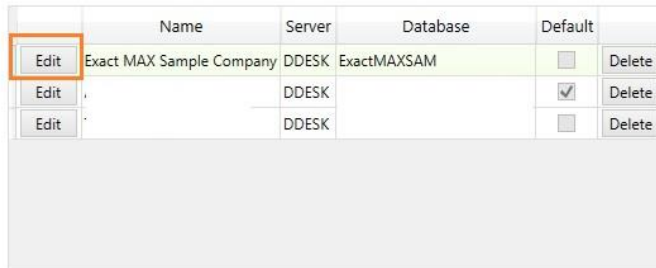


- The Database Connections section is used to create connections to a database. Multiple connections could be specified.

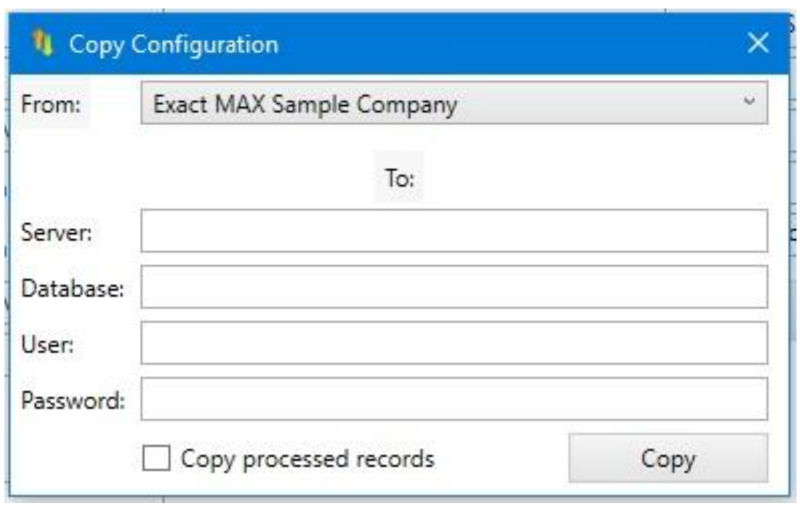
Setting	Mandatory	Description
Name	Y	The name of the connection. The specified value will appear in the list of available connections on the Document Manager Web UI login screen.
Server	Y	The name of the SQL Server.
Database	Y	The name of the SQL Database.
Windows Authentication	N	If checked, the Document manager will attempt to connect to the specified SQL Server using Windows Authentication. This connection mode is not recommended. The recommended connection mode is to leave this option unchecked which means that the Document Manager will attempt to connect using SQL Server Authentication.
User	Y/N	Used to login to the specified SQL Server if the Windows Authentication checkbox is not checked. It is recommended to use the ‘sa’ user or a user that has Read, Write, Modify control over the specified database.
Password	Y/N	Used to login to the specified SQL Server if the Windows Authentication checkbox is not checked.
Is Default	N	Used to specify the default connection. The default connection will be automatically selected in the Web UI Login Screen.

- Existing configuration could be copied over to a different database.
- Click the Edit button of an existing configured connection to display the connection details





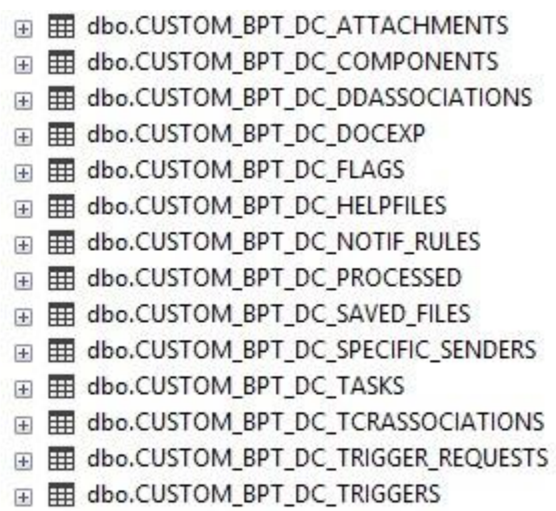
- Click Copy Configuration button to open the Copy Configuration dialog



- Select the source configuration
- Specify the destination SQL Server, Database, User and password
- Designate whether or not processed records should be copied
- Click Copy to transfer the configuration records

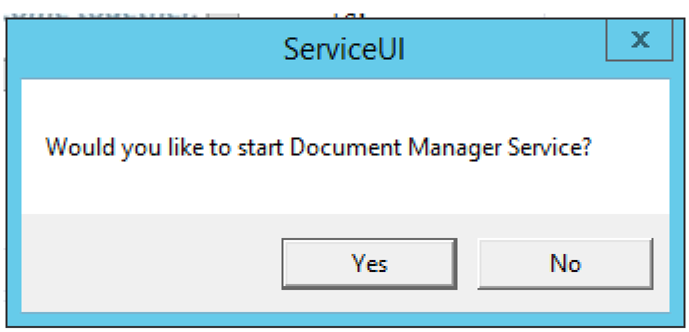
Database Tables

- For each database connection, the Document Manager creates its own tables to maintain configuration and keep track of processed records. A list of all tables created by the Document Manager is shown below.



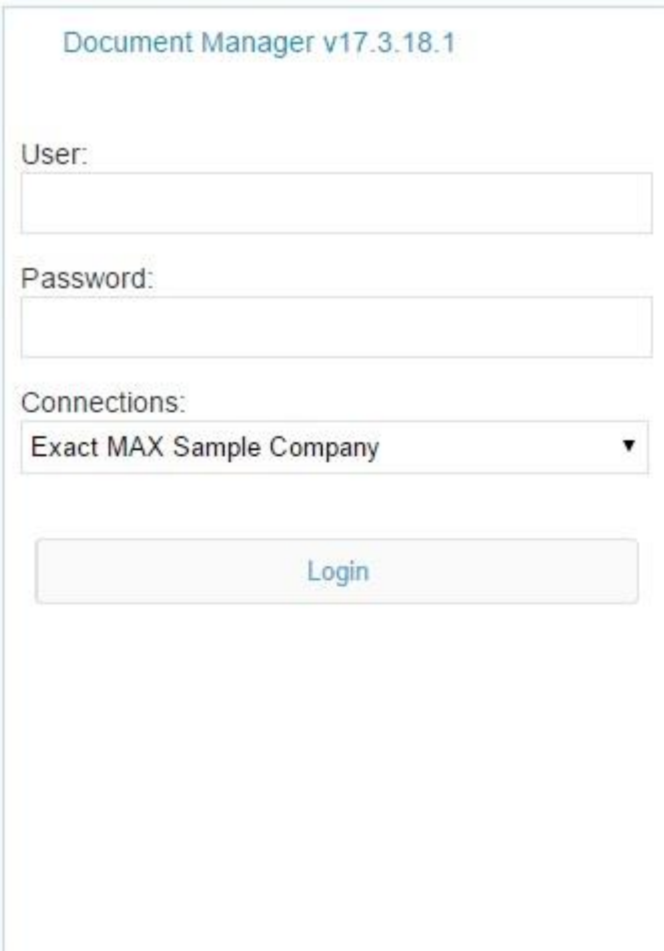
Closing the Settings Dialog

- After closing the Settings dialog, the application will prompt whether or not to start the Document Manager Service. Click Yes to start the service or click No to skip starting the service.



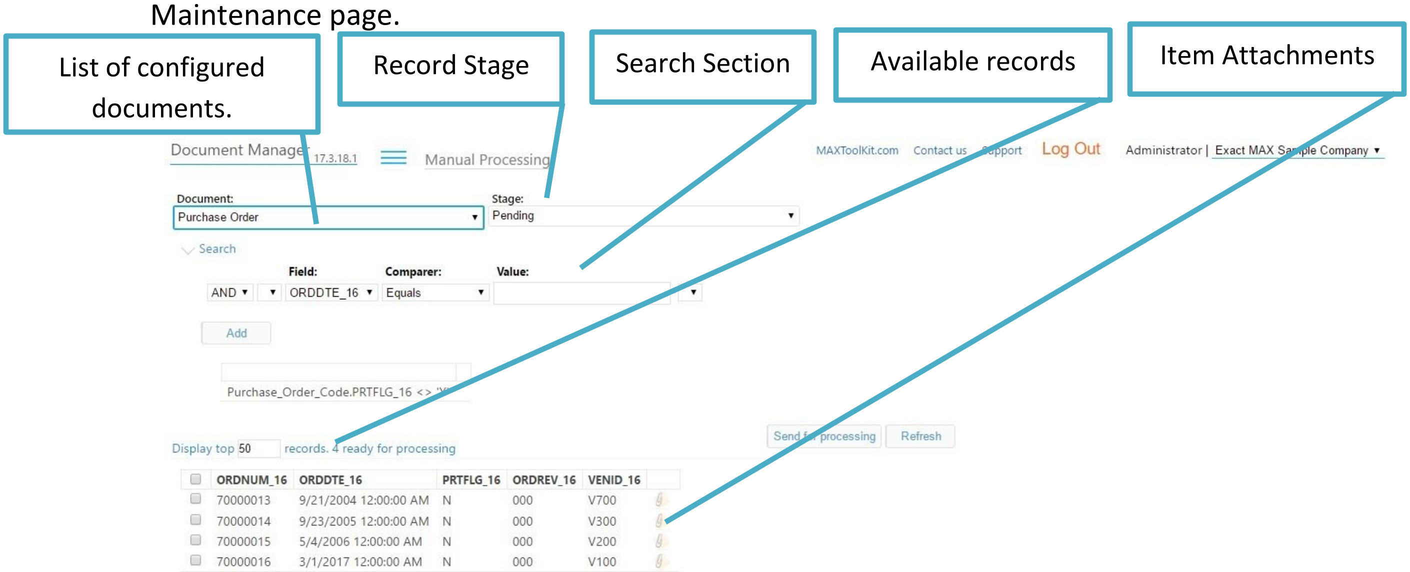
Using Document Manager

- Navigate to the provided Document Manager website.
- The Login page displays. Document Manager uses Active Directory authentication. In addition, there is a default Admin account that should only be used by the application administrator.
- The connections dropdown contains all configured connection. Each connection points to a database to the server. As long as the server where Document Manager is installed has access to a database, the Document Manager could connect to that database.



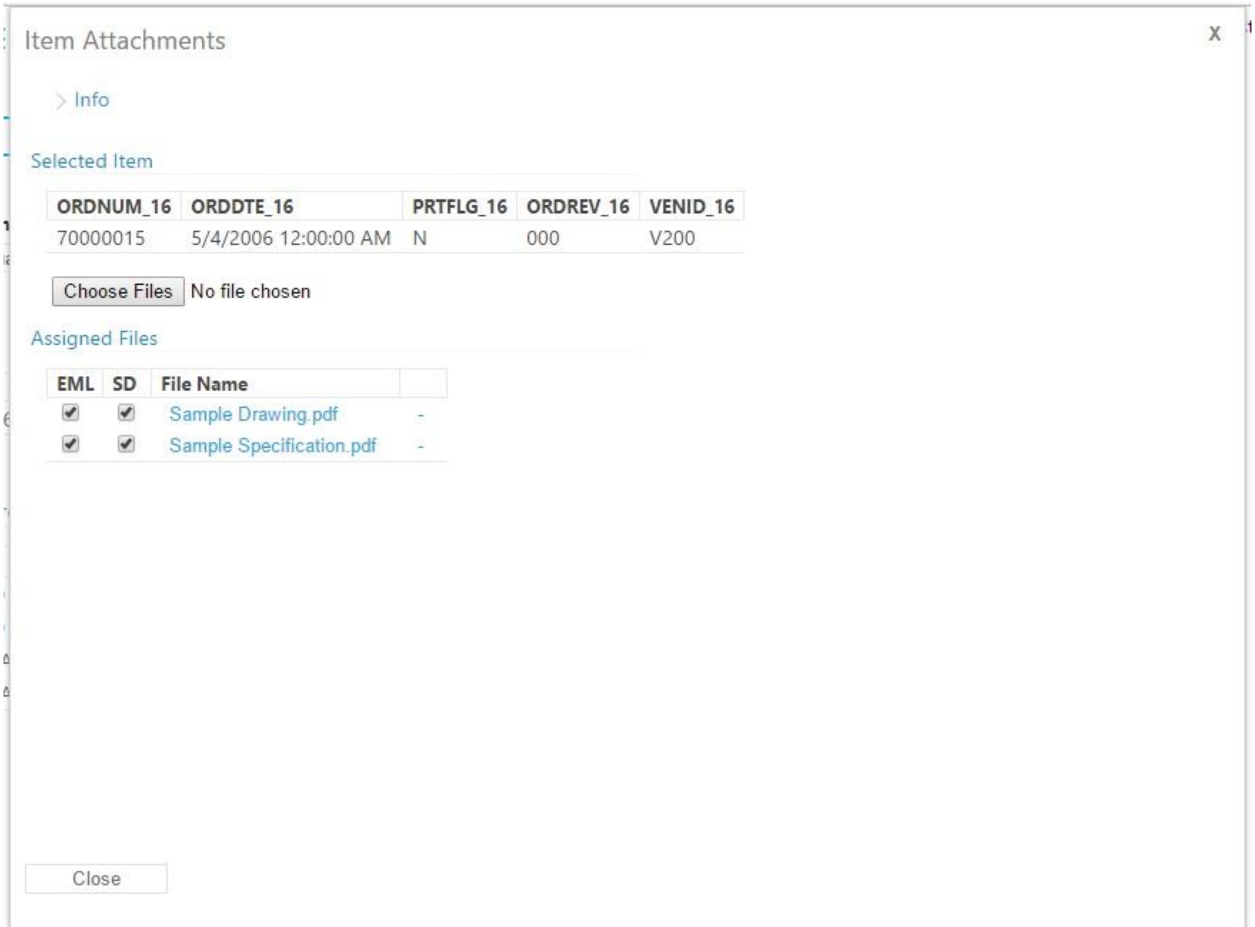
- After a successful login, you will be taken to the main page.

- Information on the Main page will be only visible if settings on the Maintenance Page have been initially configured. The Document Manager will automatically create 5 different documents and will configure the Data Content section on the Maintenance page.



- The Document dropdown contains a list of all available documents configured in Document Manager.
- The Stage dropdown switches between pending and already processed records.
- The Search section is used to filter all available records.
- The available records section shows a grid containing the result of the selection criteria chosen by the user. The very first column in the grid is used to select or unselect records that will be send for processing. As records are being selected and sent for processing, they are removed from the pending stage and added to the processed stage.
- The Send for Processing button sends selected records to the MSMQ for processing.
- The Hide Search button, shows/hides the Search section.
- The Refresh button refreshes the results on the page.
- There is a button in the form of a yellow icon which when clicked displays the Item Attachments dialog

- The Item Attachments dialog is used to associate files with individual records.
- Click the browse button to browse for available files.

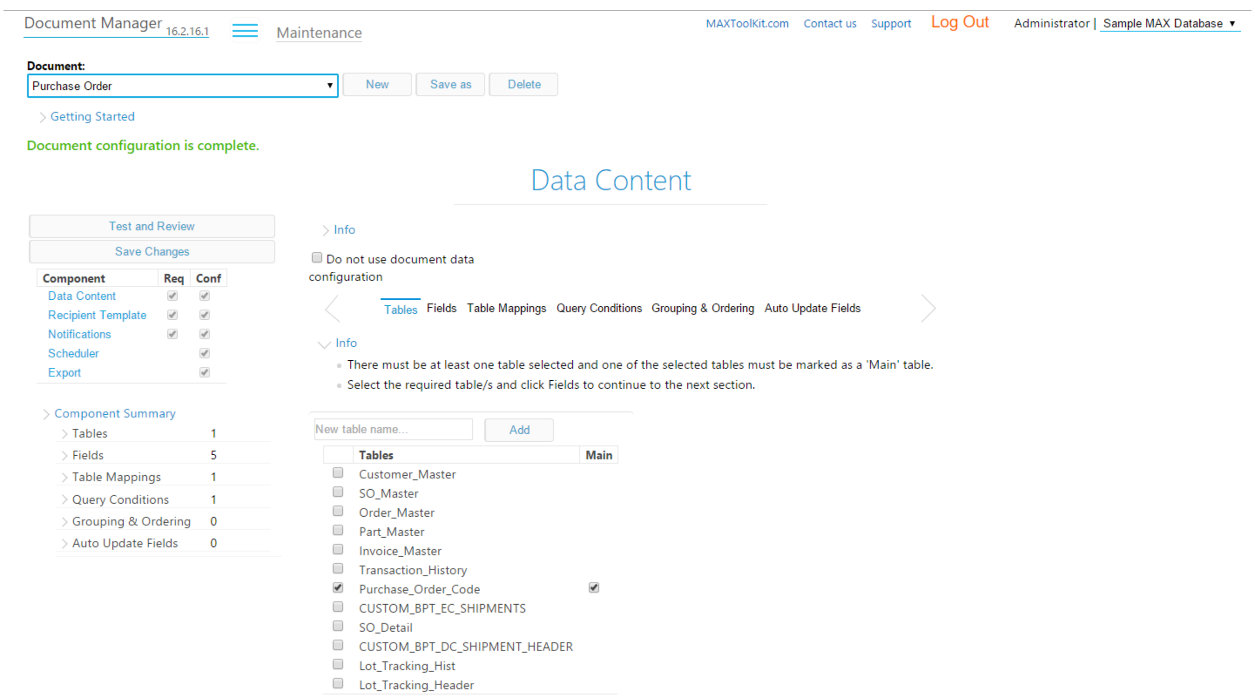


- EML stands for Email. If checked, the file will be added an additional attachment to the email message
- SD stands for Save to Disk. If checked, the file will be saved to the specified disk location.
- Click on a file name to download and open a file.

Maintenance Configuration

- All the components on the Maintenance page in Document Manager will only be visible to users that are designated as administrators.
- Move the mouse cursor over the navigation icon at the top of the main page and click Maintenance.

- The very first time the Maintenance page is loaded, the Data Content component is selected by default.



Components Configuration

The order in which the Document Manager components must be configured is:

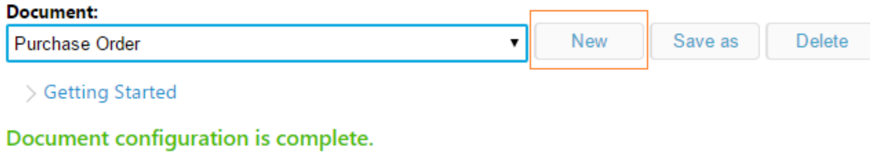
1. Data Content
2. Recipient Template
3. Notifications
4. Export (Optional)
5. Scheduler (Optional but Preferable)

Data Content

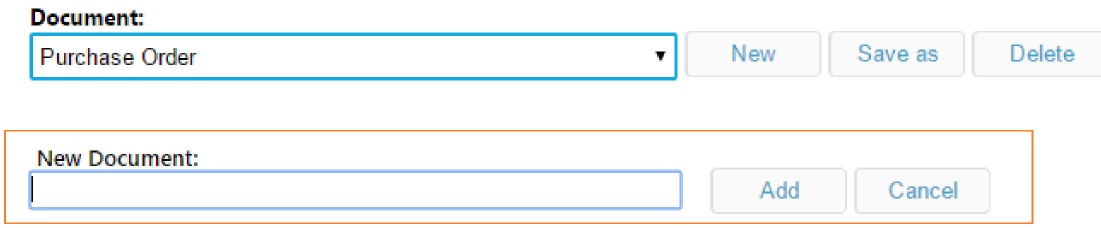
- The purpose of this component is to create an association between a selected document and data from the selected database connection. The user will be able to add any of the database tables from the selected database to the user interface, join tables to query data, create query conditions, order the selected data and automatically update designated fields. The below example walks through the process of adding a new document to the list of available documents and associating it with the data available in the selected database connection.
- There is a 'Do not use document data configuration' checkbox at the top of the Data Content configuration section. The purpose of this checkbox is to allow the user to specify if the document will be associated with the configuration on this screen or not. If the selected document is associated with the data configuration, the results of this configuration will be visible on the main page in the available records section, if not, the available records section will be empty.
- All changes made on this page must be saved by clicking on the Save Changes button. If changes are not saved, they will be lost.

Example

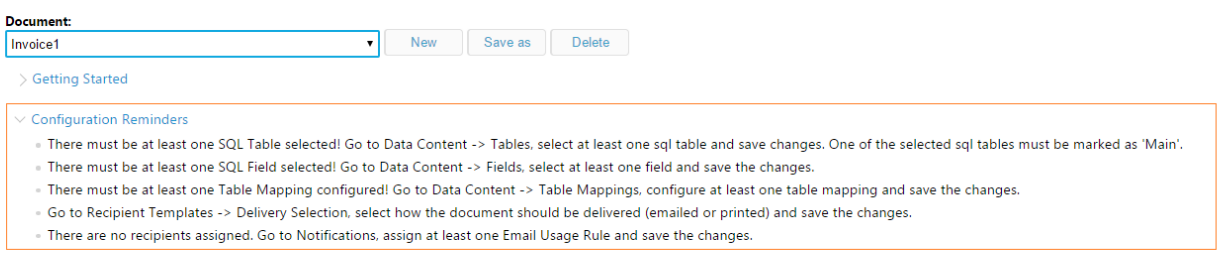
1. Click the New button



2. The New Document section becomes visible

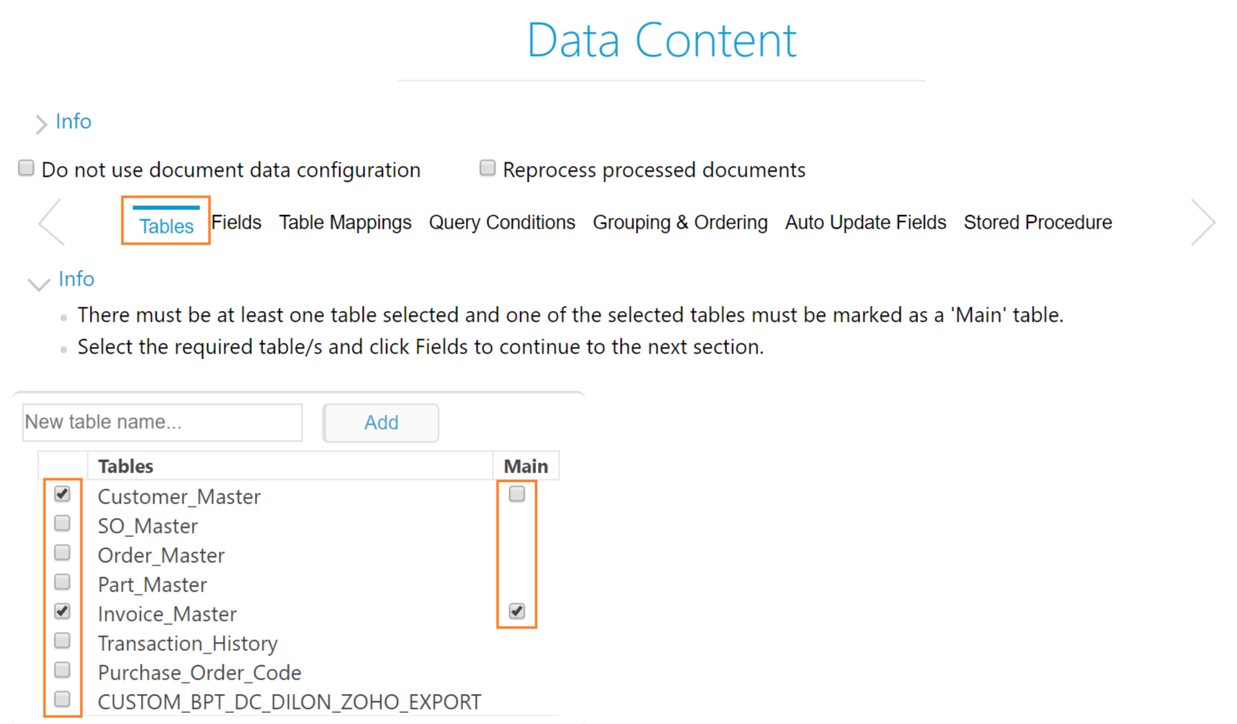


3. Enter ‘Invoice1’ and click the Add button. A new document ‘Invoice1’ will be added to the list of available documents.
4. After adding a new document, the Configuration Reminders section will become visible. Its purpose is to show the user what is missing from the document configuration and the location where the missing configuration can be specified.



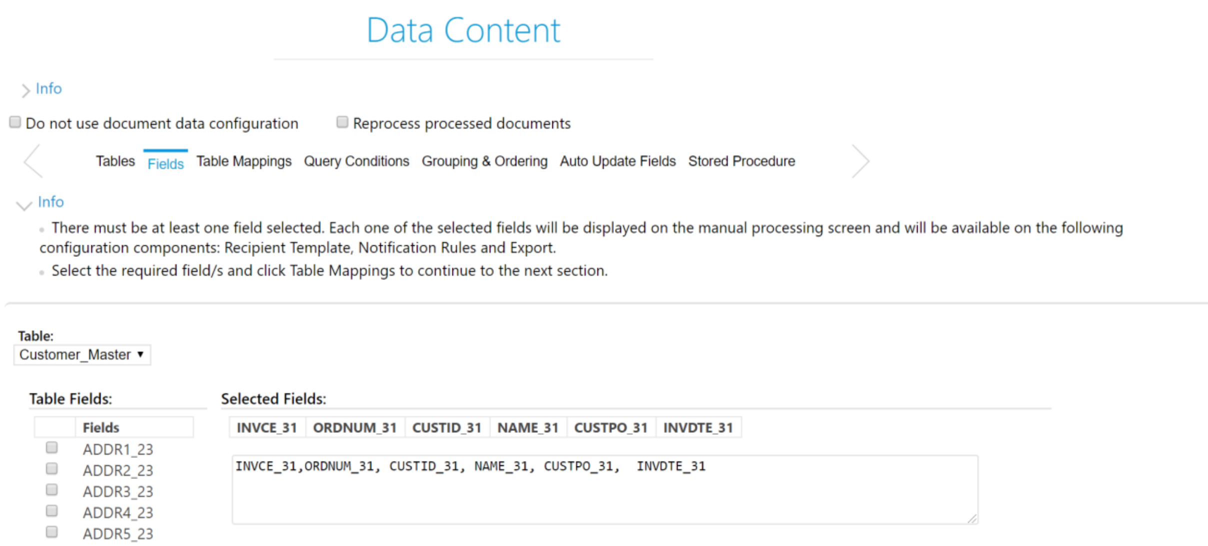
5. The available tables section contains a list of all database tables currently included in Document Manager. If you do not see the table that the document needs to be associated with, enter the name of the database table in the new table name text field and click Add. The database table will be added to the list of available tables to work with.

6. In this example we will need both Customer_Master and Invoice_Master. To select the tables, click on the checkbox which is to the left of the name of the table. A checkbox in the 'Main' column will display for both selected table. To unselect a database table, uncheck the checkbox to the left of the table name. Every association between database tables must contain only one 'Main' table. In this example, the main table will be Invoice_Master. Check the checkbox beside the Invoice_Master table in the 'Main' column.

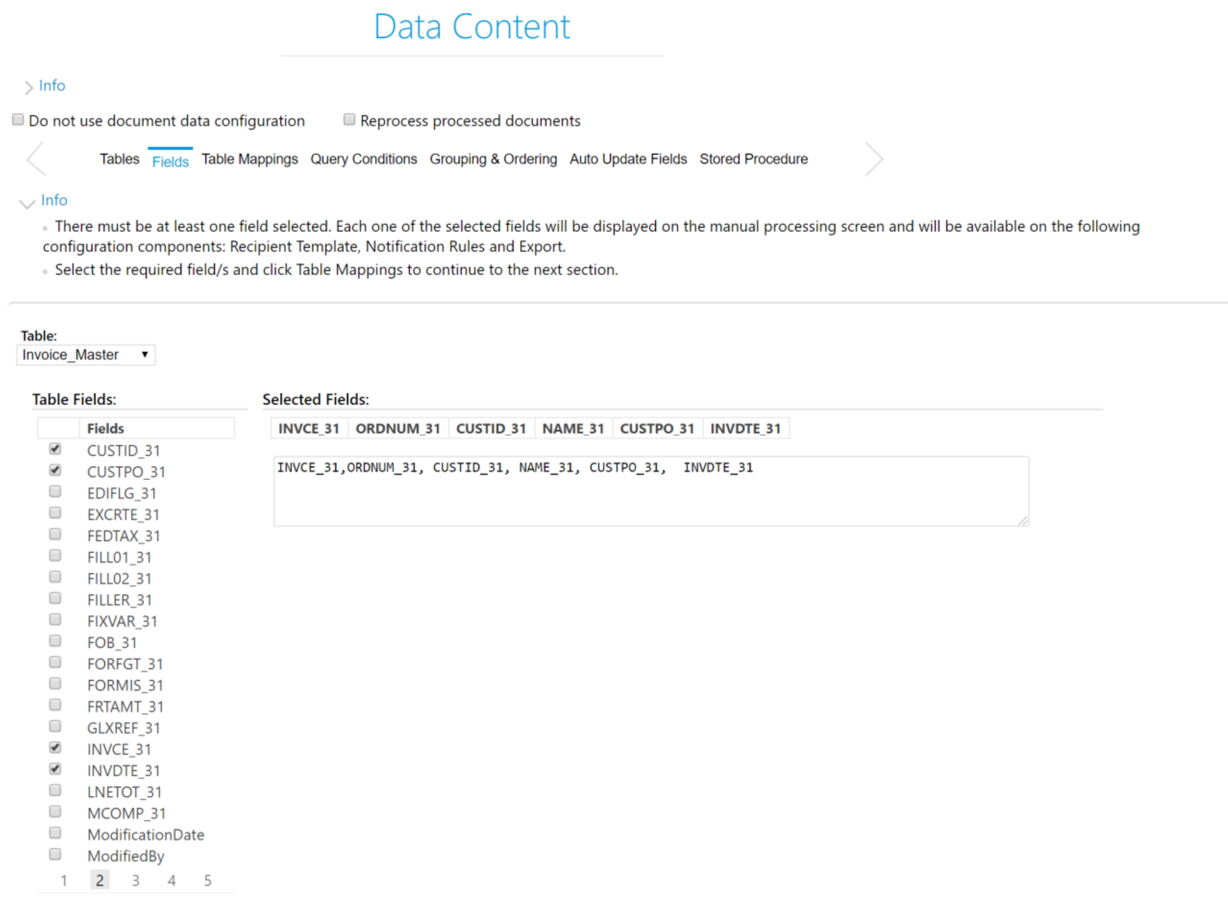


7. Every document data association must contain at least one field from the selected tables. To select fields, click on the Fields button. After clicking on it, the fields section will be displayed.

8. The fields section contains a dropdown with the selected tables and a list of the fields for the selected table.

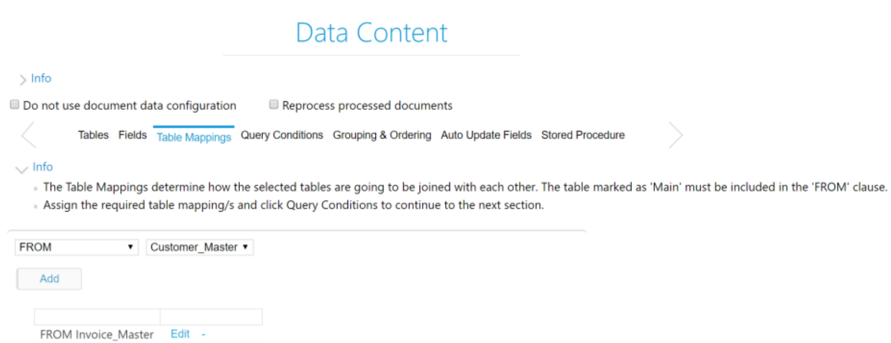


9. To select a field, first, select a table from the Tables dropdown. To add a field to the Selected Fields section, check the checkbox by the field. To remove a field from the Selected Fields section, uncheck the checkbox of the field. For this example, we will need the following fields: ORDNUM_31, INVCE_31, CUSTID_31 from Invoice_Master and NAME_23, ADDR1_23 from Customer_Master. Start by selecting the fields from Invoice_Master. Each selected field will be displayed in the selected fields text header. After selecting the fields from Invoice_Master, select Customer_Master from the Tables dopdown and select fields NAME_23 and ADDR1_23.

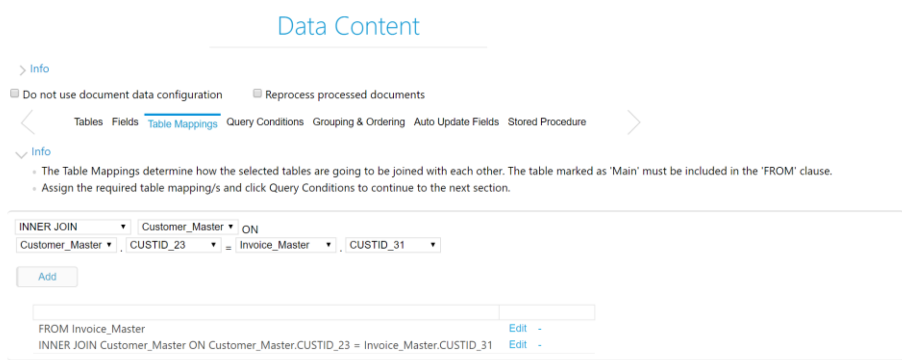


10. The next section that will have to be configured is the Table Mappings section. It allows us to select the main source of data as well as joining different database tables to achieve the desired result. The table selected as the main table (Invoice_Master in this example) must be part of the FROM clause.

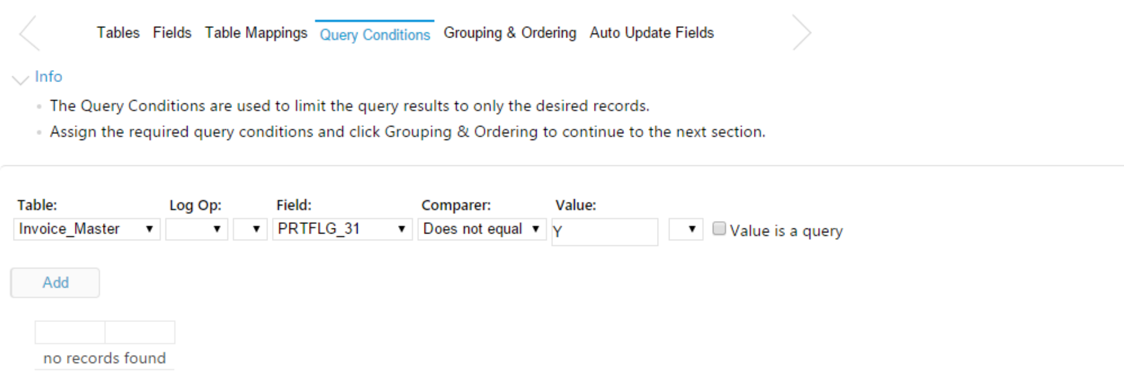
11. Select Invoice_Master from the selected tables dropdown in the Table Mappings section and click Add. To edit the selection click on the Edit button.



12. To join tables, click on the JOINS dropdown and select the desired JOIN clause. In this example we will use an INNER JOIN. The layout changes after switching from the FROM clause to a JOIN clause.

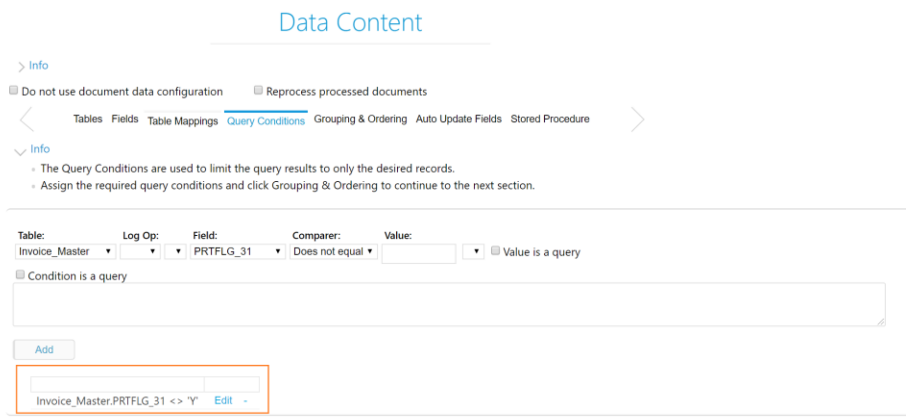


13. Configure the joining selection as shown above and click the Add button. A new INNER JOIN association will be created between Customer_Master and Invoice_Master and will be added to the selected data sources grid view.
14. The next three sections Query Conditions, Grouping & Ordering and Auto Update Fields are optional. There is an example of each one of them on the next few pages.
15. The Query Conditions section is used to filter the results from the query created so far. In this example we would like to select all invoices where the print flag has not been set and the invoice number has been assigned.

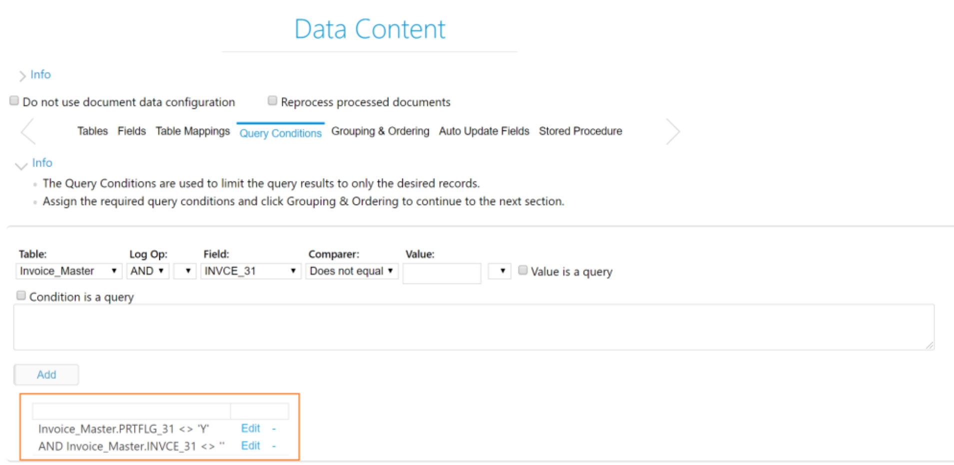


16. Select Invoice_Master from the Tables dropdown in the Query Conditions section.
17. The next two dropdowns are the Logical operator and the first dropdown that contains opening and closing brackets. The Logical operator is not required for the very first condition but it is required for all other proceeding conditions. The bracket dropdown is used to create more complicated nested conditions. We will not use it in this example. If an opening bracket is selected, a closing bracket must also be selected at the end of the condition otherwise the query might not execute properly.

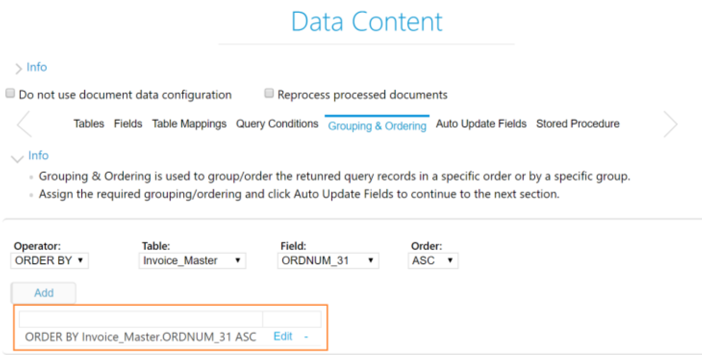
18. Select the PRTFLG_31 field from the Fields dropdown, select the Does not equal comparer and enter 'Y' in the Value text field.
19. Click the Add button. The condition will be added to the selected conditions grid.



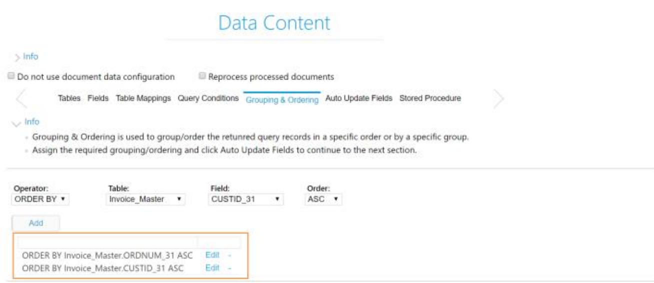
20. Leave Invoice_Master as the selected table, select AND from the Logical Operators dropdown, select INVCE_31 from the Fields dropdown, leave Does not equal as the Comparer and make sure that the value of the Value text field is blank.
21. Click the Add button. A second condition was added.



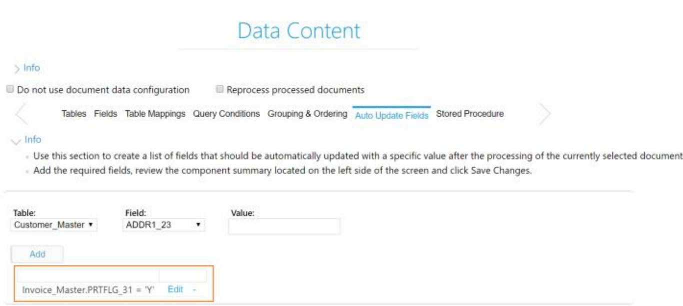
22. The purpose of the next section Grouping & Ordering is to order or group the results of the query created above.
23. Select the ORDER BY option from the Operators dropdown. Select Invoice_Master from the available tables dropdown in the Order by/Group by section. Select ORDNUM_31 from the fields dropdown and click Add.



24. Repeat the steps from the previous point with the exception that instead of selecting ORDNUM_31 from the available fields dropdown, select field CUSTID_31 and click the Add button.

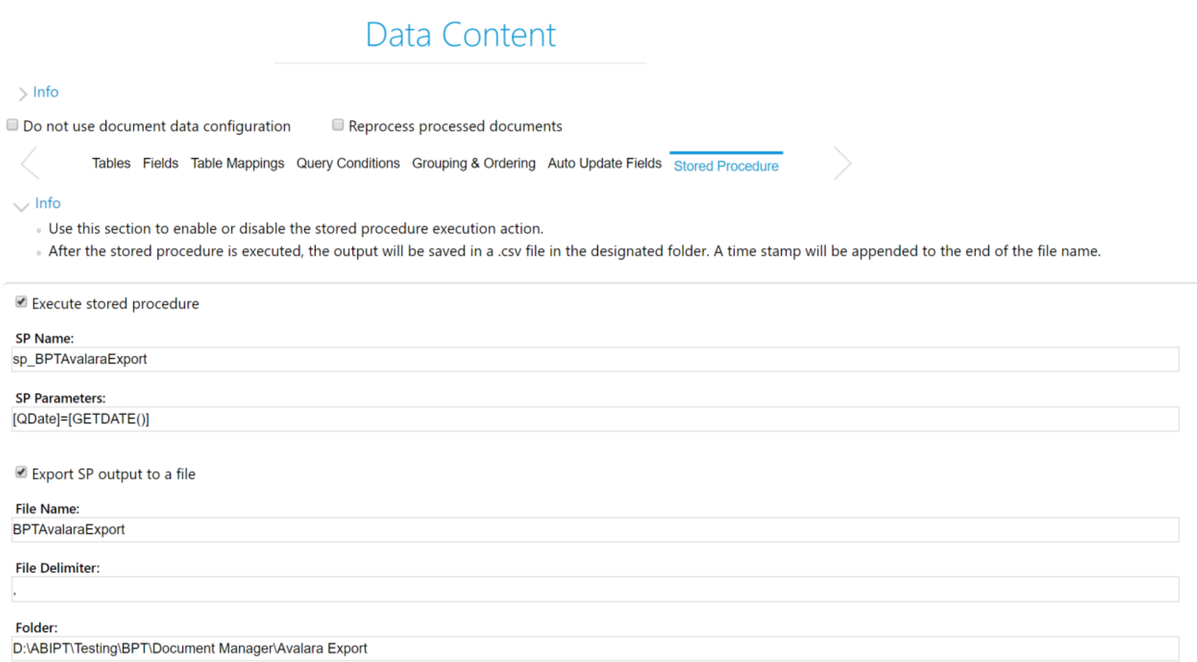


25. The Auto Update Fields section is used to specify the fields and values that will be automatically updated after each record of the created query above is processed by Document Manager.
26. Select Invoice_Master, select field PRTFLG_31 from the Fields dropdown and enter ‘Y’ (without the quotes) in the Value text field.
27. Click the Add button.



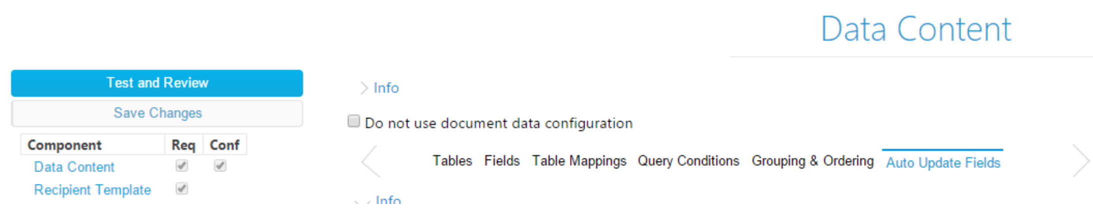
28. The Stored Procedure section is used to specify a stored procedure to be executed with each processed document.
- Execute stored procedure checkbox is used to designate that a stored procedure is to be executed.
- SP Name is the name of the stored procedure to be executed.
- SP Parameters input field are optional. This field is used to specify parameters that the specified stored procedure accepts.
- Export SP output to a file checkbox is used to designated that the output of the stored procedure is to be exported to a file.

  File Name is the name of the file to be exported. Keep in mind that a time stamp will be appended to the end of the file name.
- File Delimiter designates the delimiter of the exported file.
- Folder is the location where the exported file will be saved.



Testing Document Data Associations

- The configuration must be tested and saved, after everything has been configured on the Document Data Association page.
- Click on the Test and Review button to initiate the Query Results dialog.



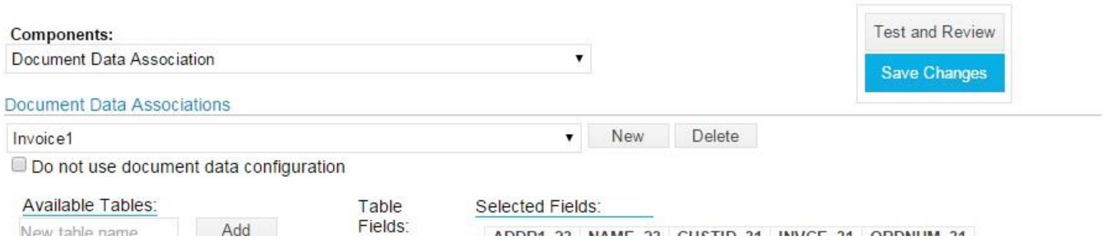
X Query results

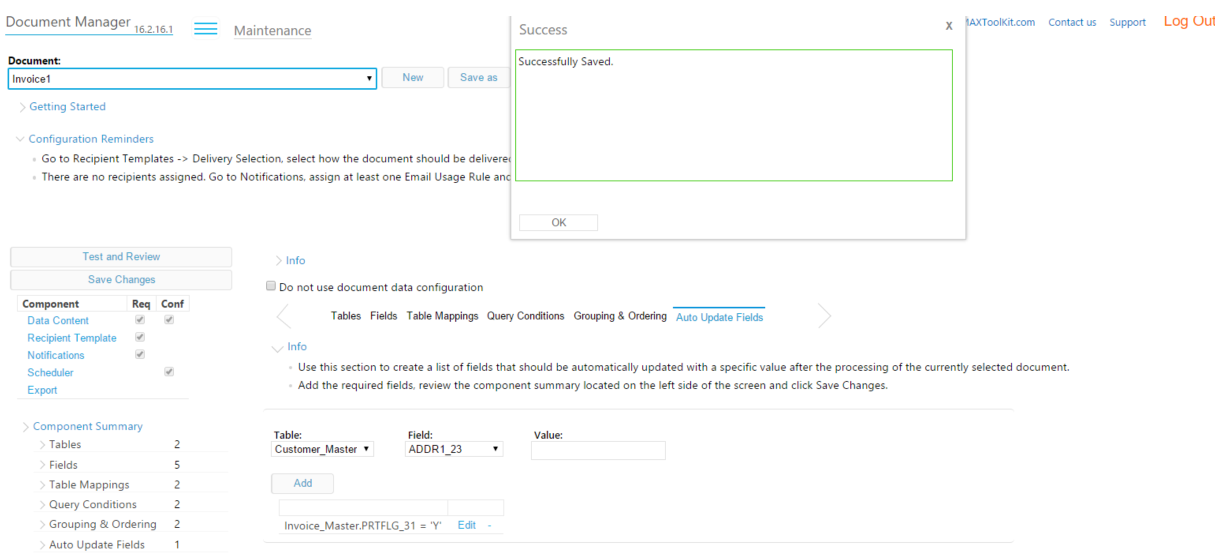
```
SELECT TOP 10 ADDR1_23, NAME_23, CUSTID_31, INVCE_31, ORDNUM_31
 FROM Invoice_Master
 INNER JOIN Customer_Master ON Customer_Master.CUSTID_23 = Invoice_Master.CUSTID_31
 WHERE
  Invoice_Master.PRTFLG_31 <> 'Y'
 AND Invoice_Master.INVCE_31 = ''
ORDER BY Invoice_Master.ORDNUM_31,  Invoice_Master.CUSTID_31
```

ADDR1_23	NAME_23	CUSTID_31	INVCE_31	ORDNUM_31
2200 Tasman Boulavard	INTEL CORPORATION	C103		20000002
1800 Concord Way	MEDTRONIC CORPORATION	C104		20000011
2200 Tasman Boulavard	INTEL CORPORATION	C103		20000018
200 CI WAY	THE COMPANY	C214		20000025
3400 Lake Shore Drive	SATURN AUTOMOTIVE	C105		20000028
300 WATER STREET	GLACIER DRINKS	C102		20000332
33 South 6th St.	TARGET CORPORATION	T100		20000399
300 BG parkway	BIG GUY'S COMPANY	C100		20000402
100 SOUTH MAIN	GODDPENNYS PAINTS	C101		20000403
300 BG parkway	BIG GUY'S COMPANY	C100		20000404

- The Query Results dialog will display the action query in the top portion of the dialog. The second portion of the Test Query dialog contains only the TOP 10 results of the created query. The created query will be functional and accepted if no errors were received up until this point. Close the Query Results dialog by clicking on the X button located at the top left corner.

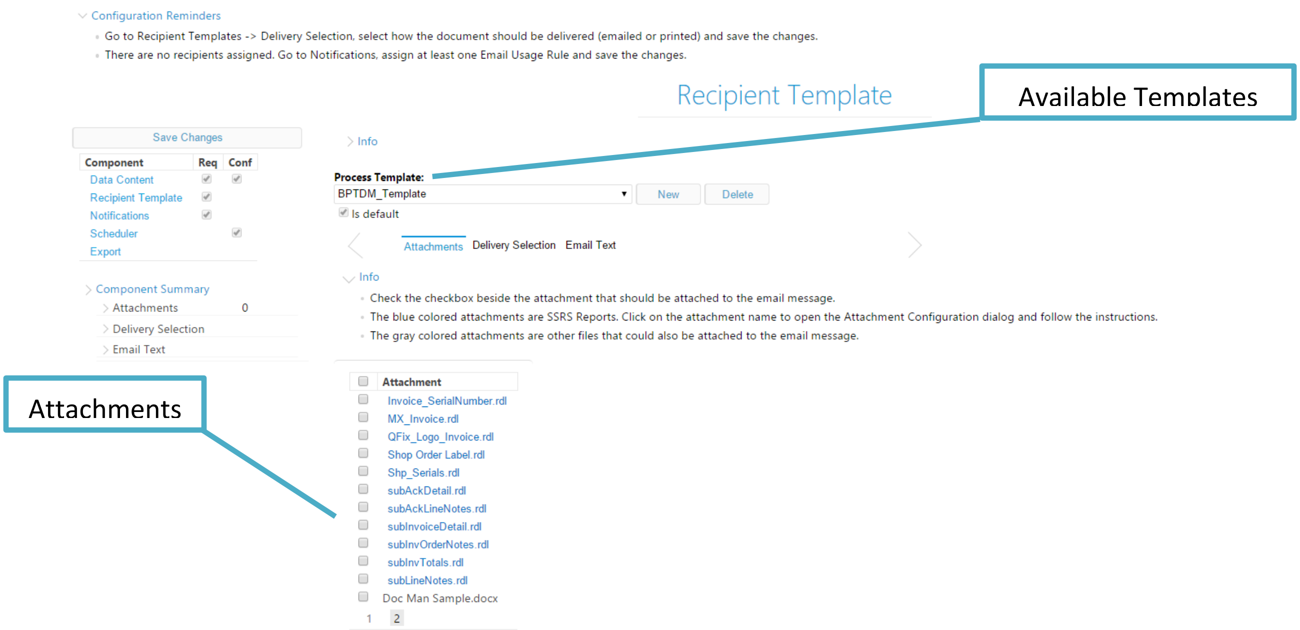
- Click on Save Changes button to save the changes. A confirmation dialog will display confirming that the changes were successfully saved.





Recipient Template

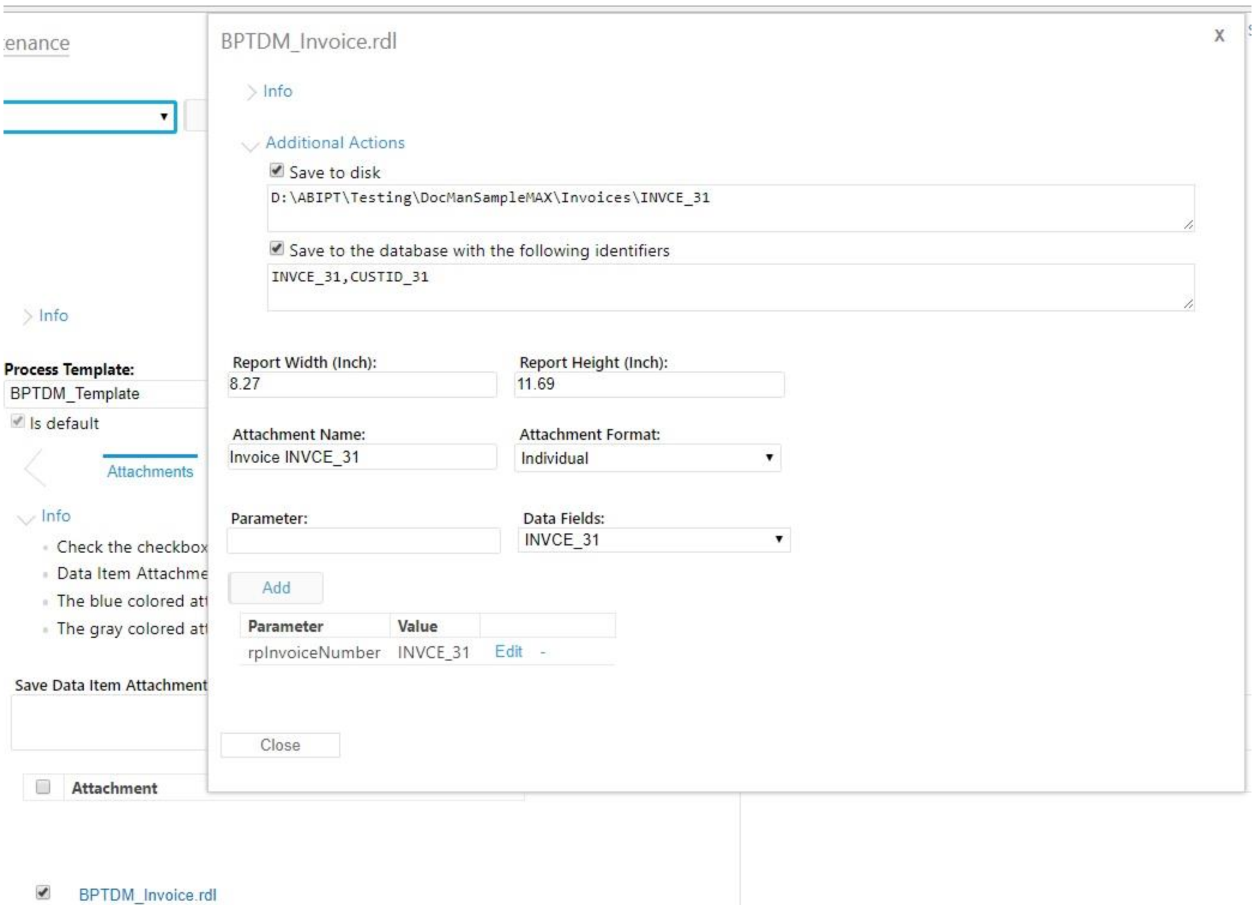
- This component is used to create templates which will be used by Document Manager to decide how the email notifications should be formed. Every template contains all available documents. For each document, the user has the ability to select what files to attach to the email message, the delivery selection and the email text. The template shown on the image below was automatically created by Document Manager. There could be more than one template. However, at least one of the templates must be a default template. The Is Default checkbox under the Templets dropdown designates the default template.



- The Attachments subsection contains all of the files available for attaching. There are two types of attachments:
    1. SSRS Reports - the SSRS Reports are loaded directly from the specified SSRS Server. This type of files will appear with blue font and will be clickable. More than one SSRS Report could be selected. Document Manager includes four already prebuilt reports ready to be used. The specified SSRS Report will be executed, populated with data from the database, will be exported to a PDF and will be either attached to an email, printed out or both depending on the configuration.
    2. Any other files that are not SSRS Reports. They will appear with black font and are not clickable or printable.
- Most SSRS Reports need a connection to a database source and have parameters that will have to be populated with a value before executing the report. The already prebuilt reports with Document Manager connect to the database selected by the user and the parameters have already been mapped out. Any additional SSRS reports added to the

Document Manager must have already configured data source – either integrated with the report itself or external data source located on the SSRS server.

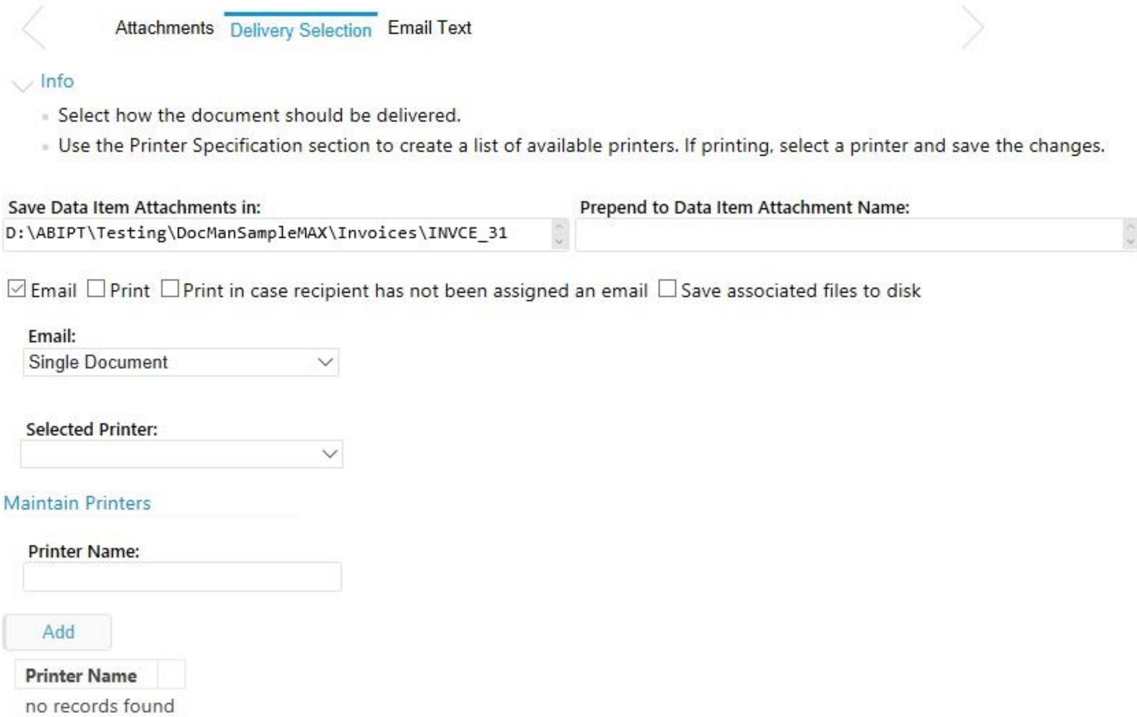
- To associate report parameters with an SSRS Report, click on the report name in the Attachments section. The report parameter dialog will be displayed. The image below shows the contents of the report parameter dialog after clicking on BPTDM_Invoice.rdl Report.



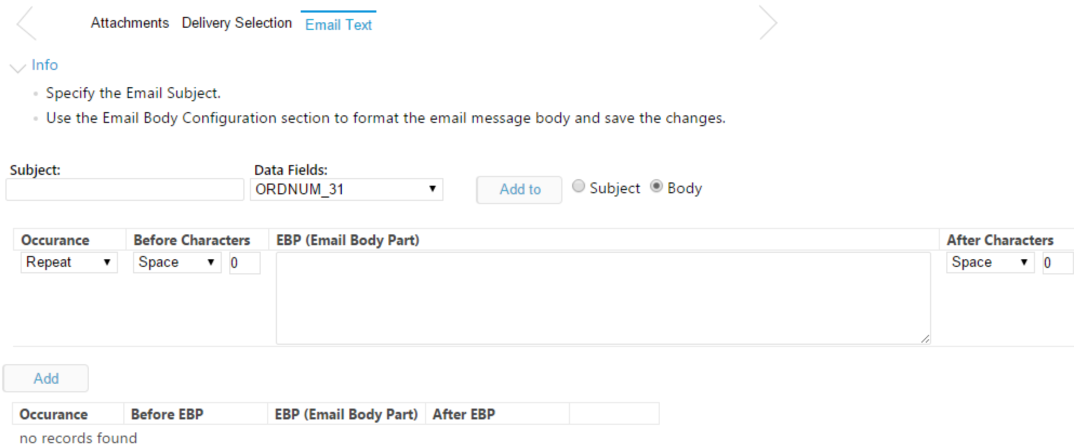
- The Info section contains a few useful tips
- The Additional Actions section could be used to configure Document Manager to save the exported SSRS report to a location on the disk or to the database in a custom table maintained by Document Manager.
- Report width and height are used to specify the dimensions of the selected SSRS Report. The default size is A4.
- The Attachment Format is used when sending emails. There are two attachment formats:

1. Individual – exported and attached SSRS reports will be in separate .pdf files
2. Combined – exported and attached SSRS reports will be combined into a single .pdf file

- The parameter text field is used to hold the name of the parameter from the report. The name of the parameter must be spelled exactly the same as it is in the actual SSRS report otherwise the parameter will not be populated with a data value.
- The Data Fields dropdown contains all database fields selected on the Document Data Association screen. Each report parameter must be mapped with either a data field or with any other appropriate value.
- The Attachment Name is the name of the attached file that will appear on the email message. A date time stamp will be added at the end of the Attachment Name
- Click Close to close the report parameter dialog.
- The Delivery Selection subsection is used to specify how the document should be delivered. It could be emailed, printed or both. The dropdown by the Print checkbox contains a list of all printers specified on the Printer Configuration section.
- The Save Data Item Attachments In text field is used to specify a folder where associated document files could be saved.
- The Prepend to Data Item Attachment Name text field is used to specify the values that should be prepended to the actual attachment name.
- The Email dropdown is used to specify whether an email to a recipient should contain a single document or it could contain multiple documents. Each option in this dropdown will include any additional files associated with a document to the email message.
- Use the Maintain Printer section to Add/Remove/Edit available printers.

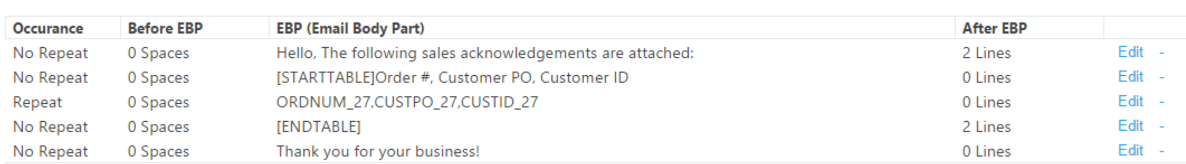

Attachments
Delivery Selection
Email Text
Info
Select how the document should be delivered.
Use the Printer Specification section to create a list of available printers. If printing, select a printer and save the changes.
Save Data Item Attachments in:
D:\ABIPT\Testing\DocManSampleMAX\Invoices\INVCE_31
Prepend to Data Item Attachment Name:
Email
Print
Print in case recipient has not been assigned an email
Save associated files to disk
Email:
Single Document
Selected Printer:
Maintain Printers
Printer Name:
Add
Printer Name
no records found

- The Email Text subsection is used to configure the Subject and Body of the email message for the selected document.



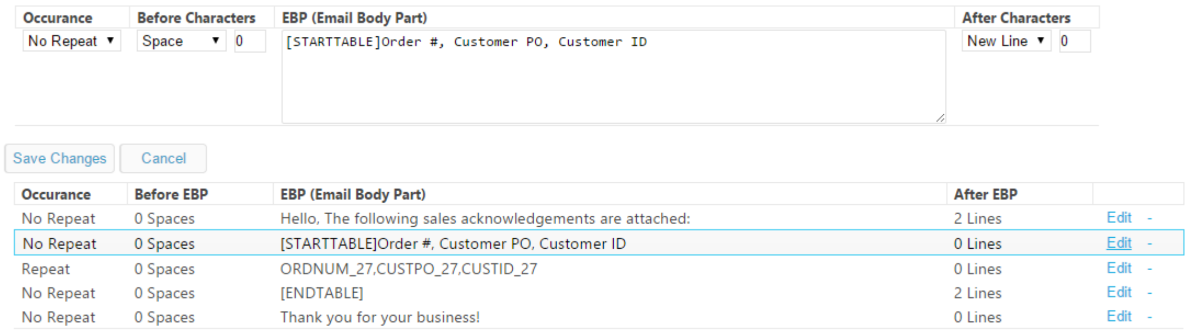
  - The Data Fields dropdown contains a list of fields selected on the Document Data Association page. All available fields could be used in the email subject or email body. The values of the fields will be retrieved from the database if available.
  - EBP stands for Email Body Part. An EBP is part of the email body. There could be multiple EBPs configured. The before character is the type of character that will be added to the email body before the EBP is added. The after character is the type of character that will be added to the email body after the EBP is added. Number of occurrences for each before/after characters can also be specified. The occurrence dropdown is used to specify if the EBP should be repeated for each attachment or if should not be repeated.
  - To start creating the email body, enter the EBP, select before/after characters and their occurrences, select the occurrence of the EBP and click Add.

- To delete an EBP, click on the button to the right located in the very right corner in the list of already added EBPs.



Occurance	Before EBP	EBP (Email Body Part)	After EBP	
No Repeat	0 Spaces	Hello, The following sales acknowledgements are attached:	2 Lines	Edit -
No Repeat	0 Spaces	[STARTTABLE]Order #, Customer PO, Customer ID	0 Lines	Edit -
Repeat	0 Spaces	ORDNUM_27,CUSTPO_27,CUSTID_27	0 Lines	Edit -
No Repeat	0 Spaces	[ENDTABLE]	2 Lines	Edit -
No Repeat	0 Spaces	Thank you for your business!	0 Lines	Edit -

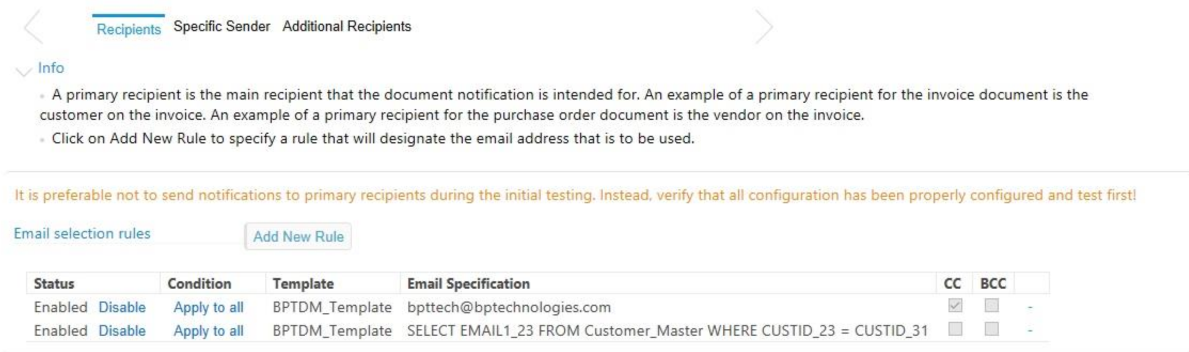
- To edit an EBP, click on the Edit button, make changes and click the Save Changes button.



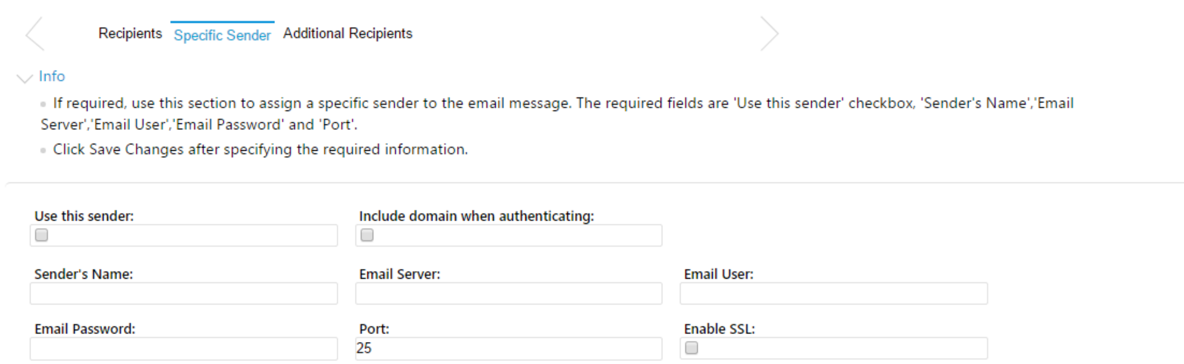
- All changes made on this page must be saved by clicking on the Save Changes button. If changes are not saved, they will be lost. The Save Changes button is always located at the top middle portion of the page. It will become more visible after the mouse is moved over it.

Notifications

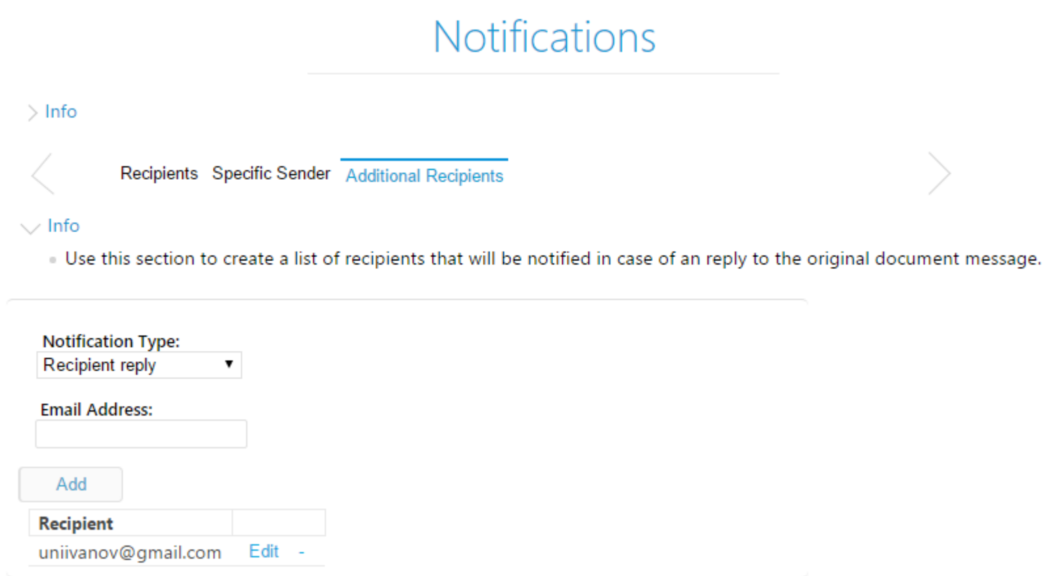
- This component is used to configure recipients that will be notified under certain conditions.



- The Recipients sub section is used to assign rules which determine the recipient of the email message based on a certain rule.
- Already created rules could be Enabled or Disabled. Each rule is assigned to a recipient template.
- Email addresses assigned to an email rule where CC and BCC checkboxes are not checked, will be assigned to the 'To' recipients of the email message
- Email addresses assigned to an email rule where CC or BCC checkboxes are checked, will be assigned to the 'CC' or BCC recipients of the email message
- The Specific Sender sub section is used to specify an email account that will appear as the email sender for the email notifications of the selected document.



- The Additional Recipients subs section is used to specify email accounts that will be create a list of recipients that will be notified in case of a reply to the original document message.



Scheduler

- The Scheduler component is used to create and schedule tasks. Every task consists of the following components:
- Task Name – free form text.
- Task Description – free form text
- Document Type – the document type that the task will be associated with
- Task Occurrence
- Start date and time
- Document manager supports four different task occurrences:
  1) One time – task will be executed one time only at the designated start date and time

- To add a one-time task, select one time from the Occurrences dropdown, select the start date and time and click the Add button. A new task will be added to the list of created tasks.

Add new task

Task Name	Document	Occurance	Start	Reccurence	Repeat	Expire	Date Created	Last Executed	Description	
OT Task	Invoice	One time	6/5/2015 12:13	Every 1 weeks			6/5/2015 12:24:55 PM		Sample one time task to send Invoices	-

  2) Daily - task will be executed at the designated time based on the selected recurrence, minute/hour interval and it will expire on the designated date at the designated time. Selecting the expiration date and time is not required. The recurrence of that task specifies how the task will recur. The default value is every day but we could select every other day, every third day, etc... The repeat every check box is used to specify how often during the day the task should repeat. It is not selected by default.

- To add a daily task, make the necessary selection and click the Add button. A new task will be added to the list of created tasks.

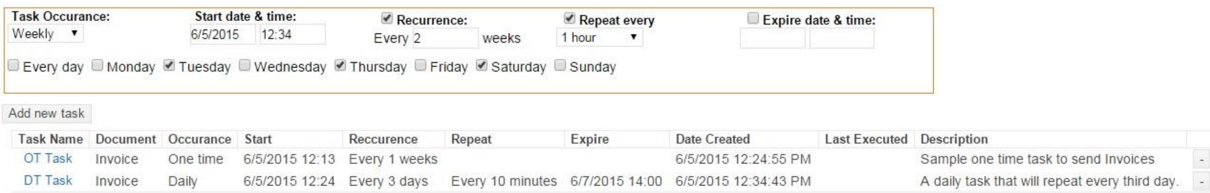
Add new task

Task Name	Document	Occurance	Start	Reccurence	Repeat	Expire	Date Created	Last Executed	Description	
OT Task	Invoice	One time	6/5/2015 12:13	Every 1 weeks			6/5/2015 12:24:55 PM		Sample one time task to send Invoices	-
DT Task	Invoice	Daily	6/5/2015 12:24	Every 3 days	Every 10 minutes	6/7/2015 14:00	6/5/2015 12:34:43 PM		A daily task that will repeat every third day.	-

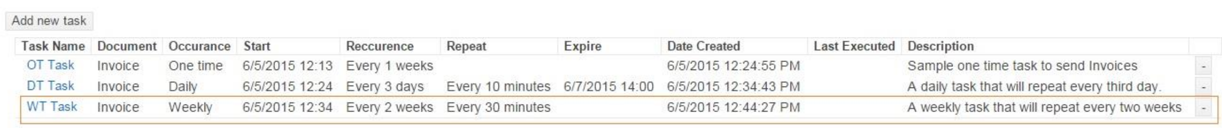
- The daily task in the image above will start on 6/5/2015 at 12:24, will repeat every third day, will repeat every ten minutes during the day and will expire on 6/7/2015 at 14:00PM
  3) Weekly - task will be executed at the designated time based on the selected recurrence, minute/hour interval and it will expire on the designated date at the

designated time. Selecting the expiration date and time is not required. The recurrence of that task specifies how the task will recur. The default value is every week but we could select every other week, every third week, etc... The repeat every check box is used to specify how often during the day the task should repeat. It is not selected by default. The Weekly task occurrence gives us the option to select the days of the week when the task should occur.

- To add a daily task, make the necessary selection and click the Add button. A new task will be added to the list of created tasks.

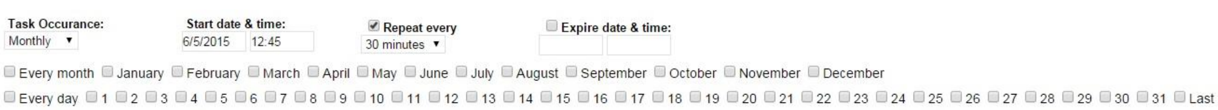


- To add a weekly task, make the necessary selection and click the Add button. A new task will be added to the list of created tasks.

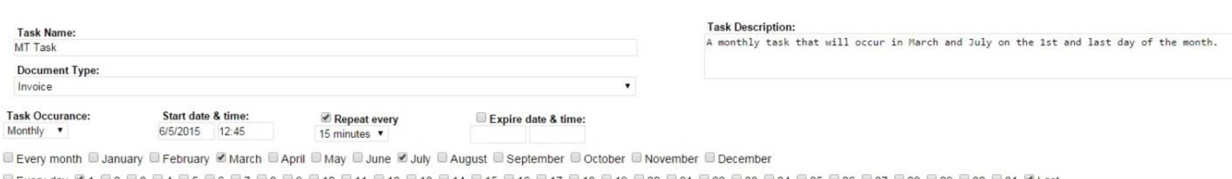


- The weekly task in the image above will start on 6/5/2015 at 12:34, will repeat every two weeks, will repeat every thirty minutes during the day and will not expire because there is not expiration date and time specified.

4) Monthly - task will be executed at the designated time based on the selected minute/hour interval and it will expire on the designated date at the designated time. Selecting the expiration date and time is not required. The repeat every check box is used to specify how often during the day the task should repeat. It is not selected by default. The Monthly task occurrence gives us the option to select the months of the year and the days of the month when the task should occur.



- To add a monthly task, make the necessary selection and click the Add button. A new task will be added to the list of created tasks.



Add new task

Task Name	Document	Occurance	Start	Reccurence	Repeat	Expire	Date Created	Last Executed	Description	
OT Task	Invoice	One time	6/5/2015 12:13	Every 1 weeks			6/5/2015 12:24:55 PM		Sample one time task to send Invoices	-
DT Task	Invoice	Daily	6/5/2015 12:24	Every 3 days	Every 10 minutes	6/7/2015 14:00	6/5/2015 12:34:43 PM		A daily task that will repeat every third day.	-
WT Task	Invoice	Weekly	6/5/2015 12:34	Every 2 weeks	Every 30 minutes		6/5/2015 12:44:27 PM		A weekly task that will repeat every two weeks	-
MT Task	Invoice	Monthly	6/5/2015 12:52		Every 15 minutes		6/5/2015 12:53:57 PM		A monthly task that will occur in March and July on the 1st and last days of the month.	-

- The monthly task in the image above will start on 6/5/2015 at 12:52, will occur in May and July on the 1st and last day of the month, will repeat every fifteen minutes during the day and will not expire because there is not expiration date and time specified.
- To edit a task click, on the Task Name, make the required changes and click the Save Change button.

Task Name	Document	Occurance	Start	Reccurence	Repeat
OT Task	Invoice	One time	6/5/2015 12:13	Every 1 weeks	
DT Task	Invoice	Daily	6/5/2015 12:24	Every 3 days	Every 10 m
WT Task	Invoice	Weekly	6/5/2015 12:34	Every 2 weeks	Every 30 m
MT Task	Invoice	Monthly	6/5/2015 12:52		Every 15 m

Task Occurance: Daily ▼ | Start date & time: 6/5/2015 12:24 | ☑ Recurrence: Every 3 days | ☑ Repeat every 10 minutes ▼ | ☑ Expire date & time: 6/7/2015 14:00

Save Changes | Cancel

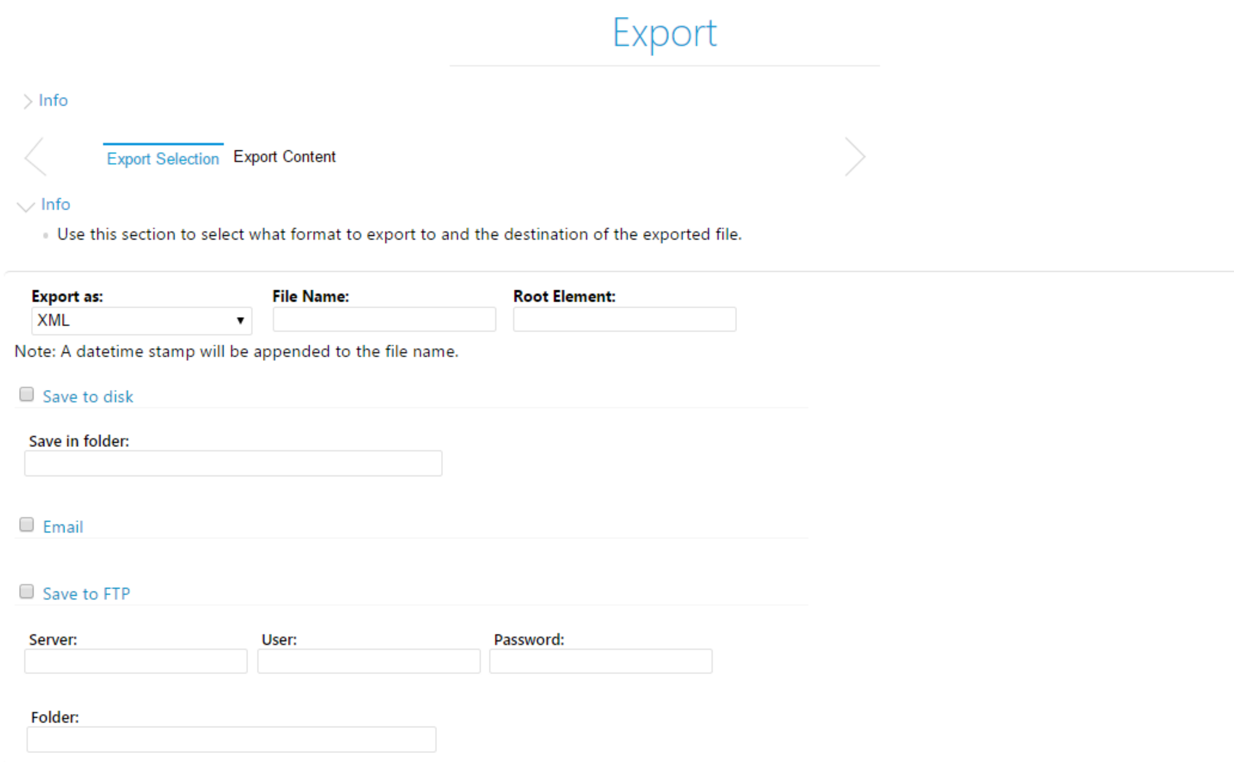
Task Name	Document	Occurance	Start	Reccurence	Repeat	Expire	Date Created	Last Executed	D
OT Task	Invoice	One time	6/5/2015 12:13	Every 1 weeks			6/5/2015 12:24:55 PM		S
DT Task	Invoice	Daily	6/5/2015 12:24	Every 3 days	Every 10 minutes	6/7/2015 14:00	6/5/2015 12:34:43 PM		A
WT Task	Invoice	Weekly	6/5/2015 12:34	Every 2 weeks	Every 30 minutes		6/5/2015 12:44:27 PM		A
MT Task	Invoice	Monthly	6/5/2015 12:52		Every 15 minutes		6/5/2015 12:53:57 PM		A

- To delete a task click on the Delete button for the task that needs to be deleted.

Task Name	Document	Occurance	Start	Reccurence	Repeat	Expire	Date Created	Last Executed	Description	
OT Task	Invoice	One time	6/5/2015 12:13	Every 1 weeks			6/5/2015 12:24:55 PM		Sample one time task to send Invoices	-
DT Task	Invoice	Daily	6/5/2015 12:24	Every 3 days	Every 10 minutes	6/7/2015 14:00	6/5/2015 12:34:43 PM		A daily task that will repeat every third day.	-
WT Task	Invoice	Weekly	6/5/2015 12:34	Every 2 weeks	Every 30 minutes		6/5/2015 12:44:27 PM		A weekly task that will repeat every two weeks	-
MT Task	Invoice	Monthly	6/5/2015 12:52		Every 15 minutes		6/5/2015 12:53:57 PM		A monthly task that will occur in March and July on the 1st and last days of the month.	- Delete this task

Document Export

This component allows us to use the assigned database fields to the document to create additional files. Currently, only the XML file format is supported. Once an additional file is created, the file can be saved to a folder on the hard disk, can be emailed or sent to an FTP site.

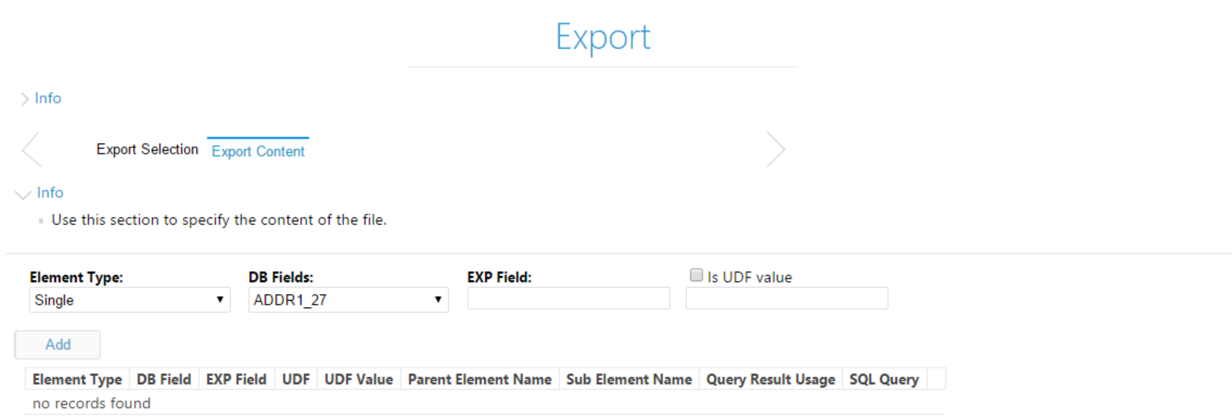


- Start by selecting the file format from the Export as drop down. Currently, only the XML file format is supported.
- Enter the file name in the File Name text field without the file extension. A date time stamp will be appended to the file name.
- The Parent Node text field is only available for the XML file format. It determines the name of the main node in the xml file.
- To save the file in a folder on the hard disk, check the Save to disk checkbox and enter the folder path in the Save in folder text field.

- To email the file, check the Email checkbox

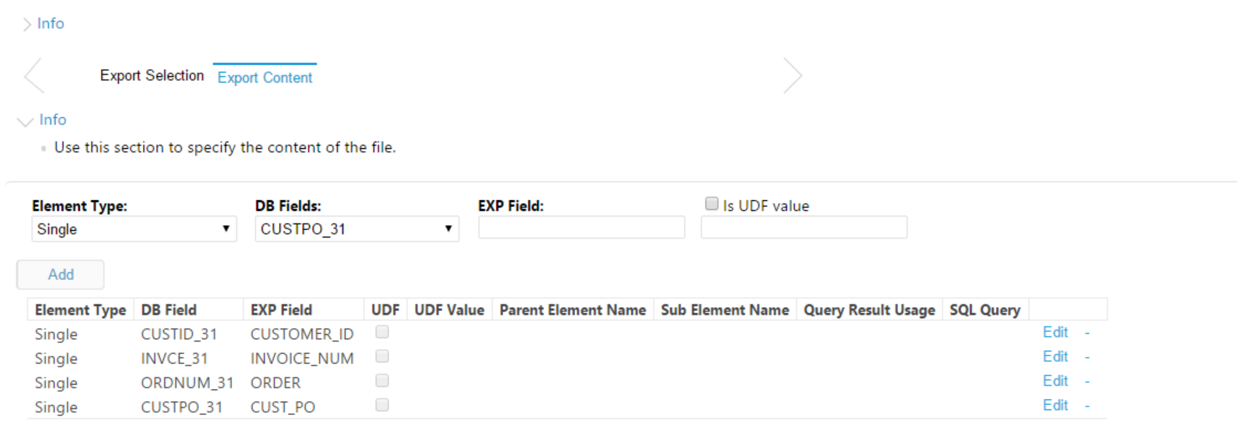
- To upload the file to an FTP site, check the Save to FTP checkbox, enter the ftp server, ftp user and ftp password. The folder is not required but can be specified.

- Keep in mind that after Saving Changes or switching to a different document type, the FTP Password field will always appear blank even after specifying the password. This is a security feature which is much recommended for use. Specify the password only if it needs to be assigned for a first time or if it needs to be changed.
- Click Save Changes button to save all the changes.
- The Export Content section is used to specify the fields and values that will be contained in the created file.

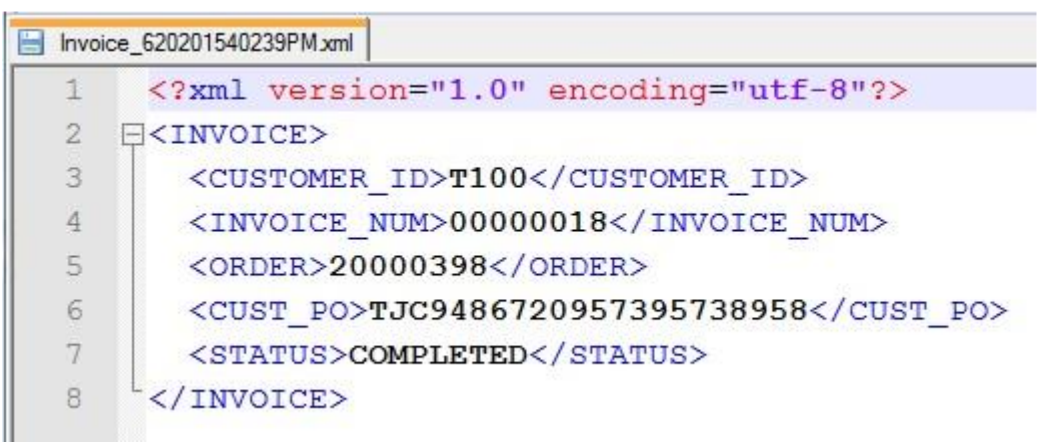


- The Element Type dropdown designates the type of the element that will be created in the exported file
- The DB Fields dropdown contains the database fields assigned to the document.

- The EXP Field text field is used to specify the name of the fields that will appear in the created file. If left blank, the name of the selected DB Field will be used. The EXP Field name must not contain any spaces or special characters. The only supported special character is the underscore.
- The Is UDF value checkbox is used to specify if the field value will be a user defined value. If this checkbox is not checked, the field value will be the value of the selected database field.
- To add a new record to the selected field list, make the necessary selections and click the Add button
- Below is an example of selected file fields for an Invoice document



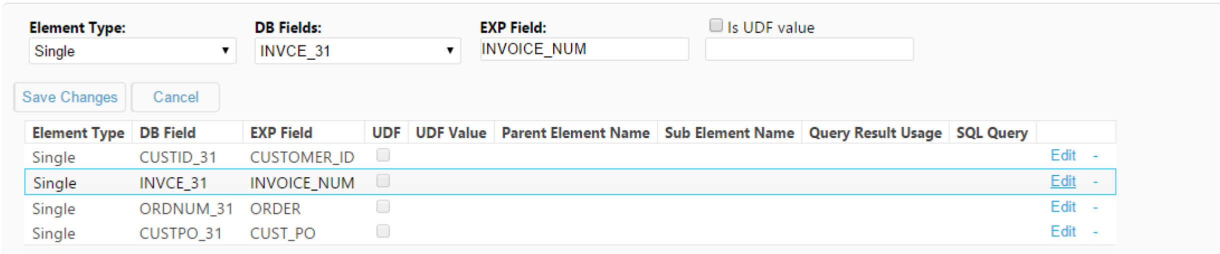
- The output file based on the shown selected fields is below



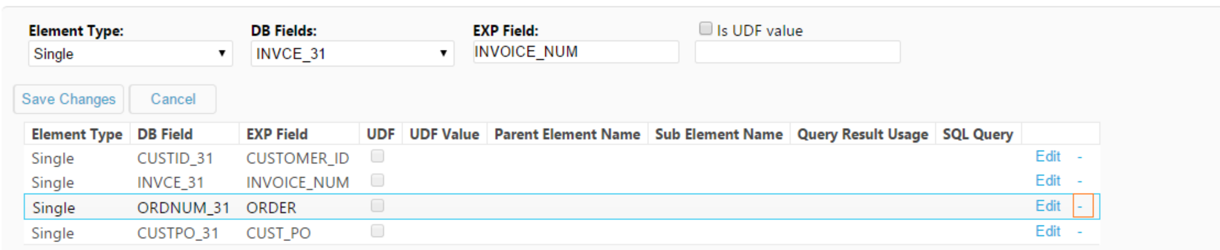
Invoice_620201540239PM.xml

```
<?xml version="1.0" encoding="utf-8"?>
<INVOICE>
  <CUSTOMER_ID>T100</CUSTOMER_ID>
  <INVOICE_NUM>00000018</INVOICE_NUM>
  <ORDER>20000398</ORDER>
  <CUST_PO>TJC948672095739573895 8</CUST_PO>
  <STATUS>COMPLETED</STATUS>
</INVOICE>
```

- To edit a record, click on the Edit button for that record, make the necessary changes and click the Save Changes button

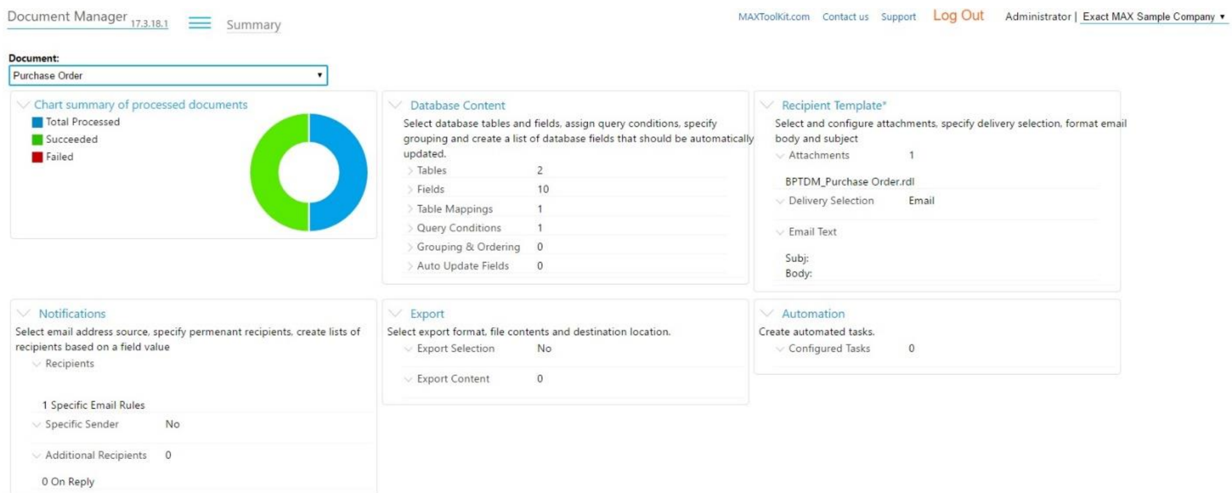


- To delete a record, click on the delete button for that record.



Summary Section

The purpose of the Summary Section is to display the entire configuration of a Document in a nicely format layout.



Help Section

The Help Section is used to store files specific to the Document Manager configuration discovery. Files could be uploaded on this section and used for future reference.