Notification Management
Quick Start Guide
Platform Services Version

Kelley Connect

Notification Management
Program updated by Brandon Strong
Quick Start Guide updated on 7/15/2021

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StapleWare®

Notification Management
Quick Start Guide

Preface

This manual describes basic information to use the Notification Management module.

What is Notification Management?

This suite of software products enhances the functionality of the DocuWare Integrated Document Management system. Notification Management sends email notifications to a user or group of users based on document metadata in a DocuWare file cabinet. Notification Management can also send email notifications for documents missing from a file cabinet and for completed groups of documents in a file cabinet. Notification Management's functionality is enhanced by the **DocuWare AutoIndex** module. By allowing AutoIndex to change field values based on variable dates in the future and the past, Notification Management can recurrently send notifications for documents. Notification Management will run as a desktop application or as a Windows Service and the notifications are sent on a predefined schedule.

Licensing

You must have a valid license file for the module that you are installing (Contact us to find out how to obtain a license). This license should be placed in a **License** folder that you've created in the DocuWare directory or under the *C:* root drive on the local machine. If you receive a license file with a .zip extension, place the .zip in the license folder and double click to extract the license file.

Installation

Download Notification Management from the StapleWare website at www.stapleware.com. Open the **Notification Management.zip** or Notification Management.zip setup utility. Double-click the **NotificationManagementSetup_v.*.msi** and run the program from its current location. The install wizard will lead you through the setup process.

Note: If you're running this software and this installation is an upgrade - Please close the program, exit the services *(if applicable)*, and uninstall the program before running this upgrade.

![StapleWare logo]

Installation - Licensing

If you are starting Notification Management for the first time the following message will appear when Notification Management is started.

Click the ellipses and select the correct license file from Windows Explorer.

Getting Started with Notification Management

Notification Management will send notification emails about documents in a DocuWare file cabinet based on selected criteria. In the following screen shot, the documents that have a STATUS of 'SEND EMAIL' have been marked for Notification Management to process. One notification email will be sent for each document that has been marked.
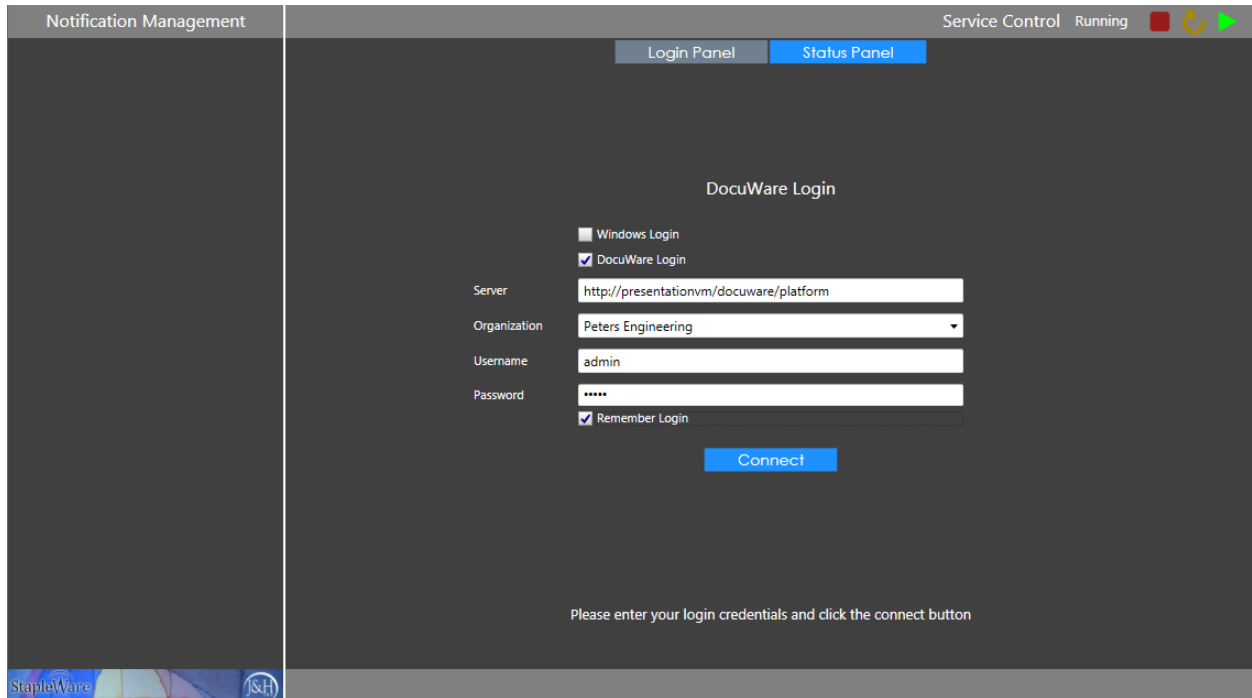

Notification Management also sends notification emails about documents missing from a DocuWare file cabinet. In the following screen shot DOC.-TYPE has the select list 'PLANS','CONTRACT','INSURANCE'. Peter's Engineering does not have any documents types missing and the group is complete. Leisure park Jones is missing 'CONTRACT' and the group is not complete. Notification Management will send a notification email that Leisure park Jones is missing a document.
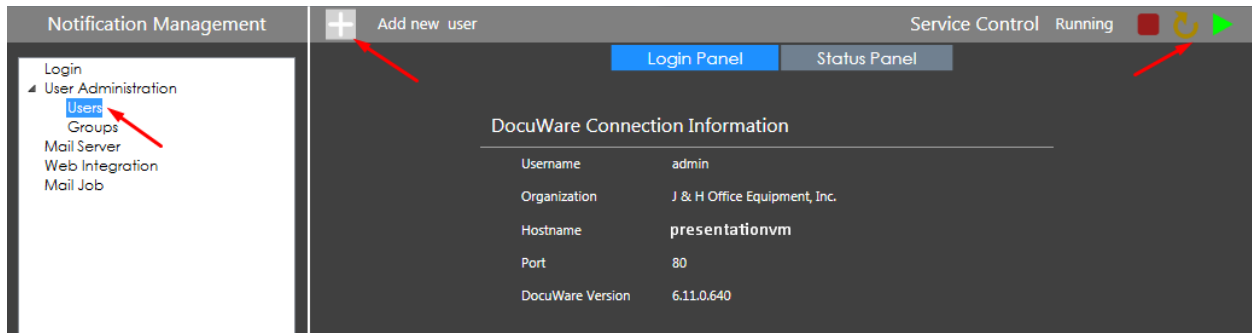
Starting Notification Management

Below is an example of the parameters of the Notification Management program.

The Notification Management user interface needs to be run as an administrator. When you start Notification Management, right click on the icon and select 'Run as administrator'. When Notification Management starts you will be presented with a screen to log into DocuWare. Enter a valid DocuWare server URL, organization, and DocuWare login credentials, then click 'Connect'.

The Notification Management service can be controlled with the 'Service Control' buttons on the top right of the screen. From the menu tree you can configure Users, Groups, Mail Servers, Web Integrations, and Mail Jobs. To create configurations either select the menu item and click the '+' button or right click the menu item and select the 'Add Configuration' popup.

Connecting to DocuWare Cloud

Notification Management works with DocuWare Cloud. Enter the DocuWare Cloud server URL, Organization, and DocuWare Cloud login credentials, then click 'Connect'. These credentials are the same as the credentials for the DocuWare Cloud Web Client.

User Configuration

Each user configuration specifies an email address to send notifications to. The only required field for a user configuration is the 'Email' field. Other fields may be populated but will not be used by Notification Management.

<u>**Setup:**</u>

1) Create a new user configuration by right clicking the 'Users' menu item and selecting 'New User'
2) Enter a valid email address in the 'Email' field

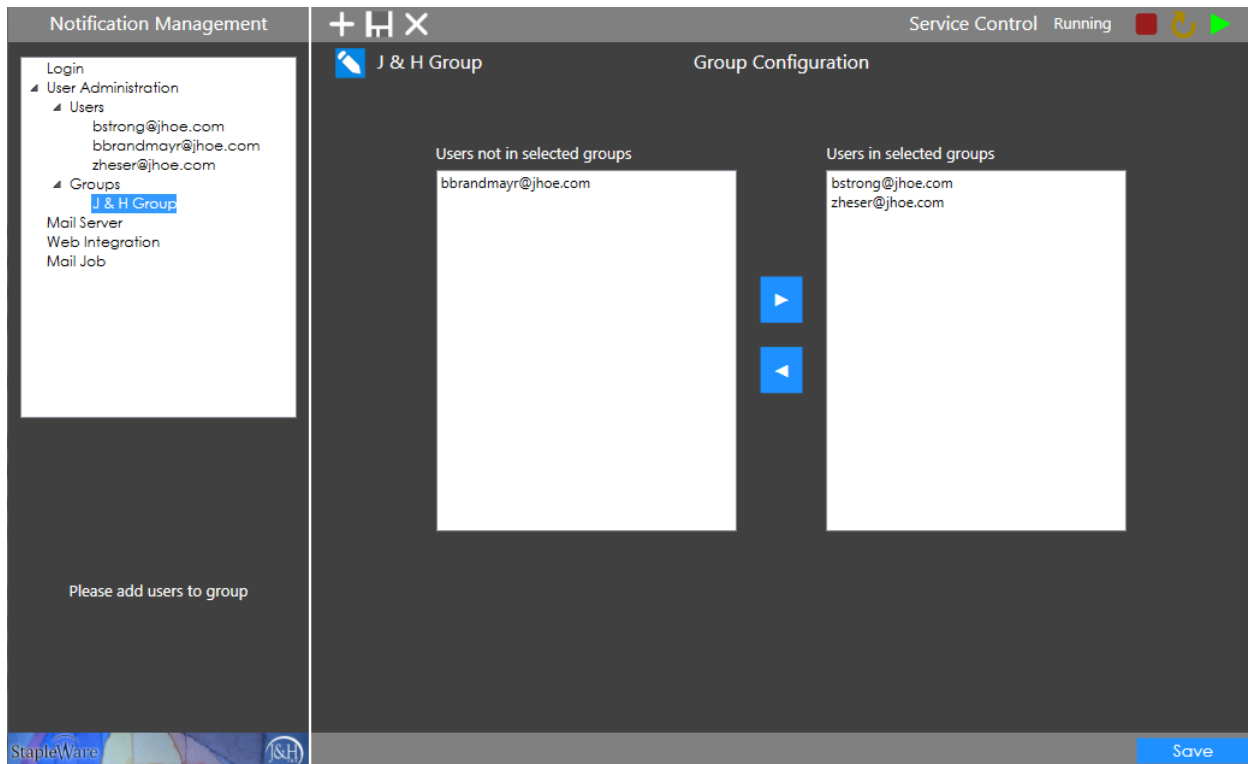Click 'Save' to save this configuration

Group Configuration

Group configurations are used for specifying multiple email addresses to send notifications to.

Setup:

1) Create a new group configuration by right clicking on the 'Groups' menu item and selecting 'New Group'
2) Click the edit pencil to name the group

3) Add a user to the group by selecting an email address in the 'Users not in selected groups' panel and clicking the '>' button.
4) Remove a user from the group by selecting an email address in the 'Users in selected groups' panel and clicking the '<' button.
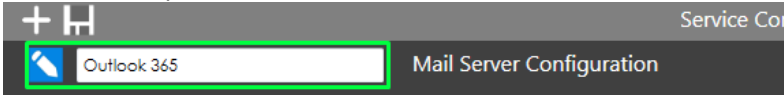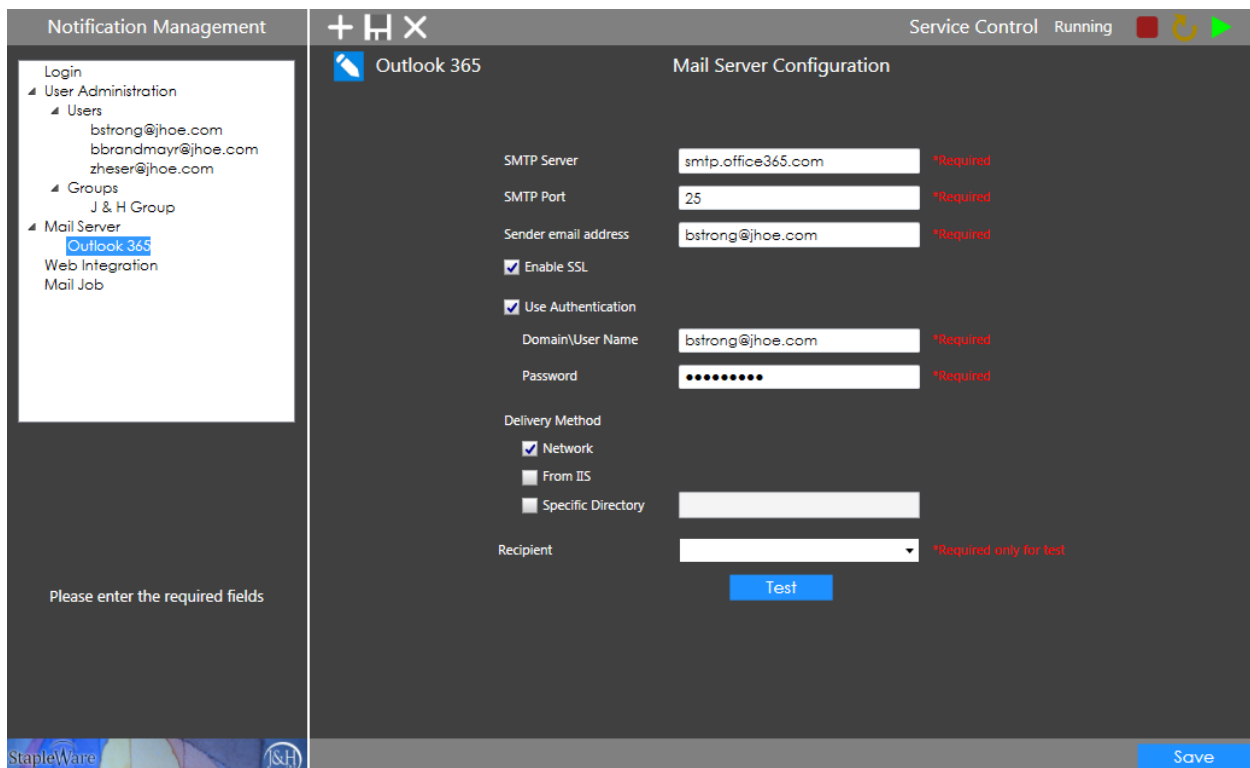

Click 'Save' to save this configuration

NOTES:
- Multiple users can be moved at once by using CRTL + Click to select the email addresses.
- At least one user must be in the 'Users in selected groups' panel in order to save the group

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Mail Server Configuration

Mail Server configurations are used for specifying which SMTP server to send emails through. Contact your local IT if you do not know the SMTP server configurations.

Setup:

1) Create a new mail server configuration by right clicking on the 'Mail Server' menu item and selecting 'New Mail Server'
2) Click the edit pencil to name the mail server

3) **SMPT Server** – IP address or name of the SMTP server
4) **SMTP Port** – Port to use on the SMTP server
5) **Sender Email Address** – Email address that notifications will be sent from
6) **Enable SSL** – Use SSL for additional security
7) **Use Authentication** – Username and Password for sender validation on SMTP server
8) **Delivery Method** – Specify how notifications will be distributed
9) **Recipient** – Enter a recipient to test the mail server configuration. This is for testing only.
10) Click the 'Test' button to test the mail server configurations.

Click 'Save' to save this configuration

![StapleWare logo]

Here is an additional Mail Server Example.
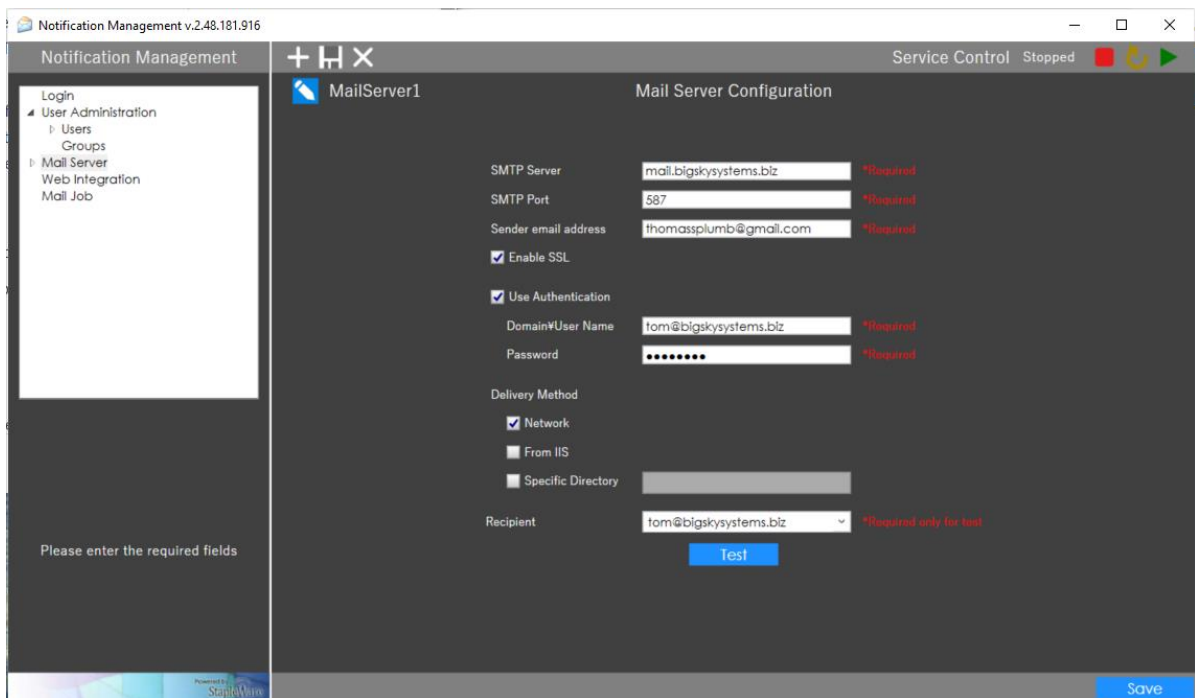
Click 'Test' to send an email that will let you know if the settings are correct.
Click 'Save' to save this configuration

Web Integration Configuration

Web Integration Configurations create hyperlinks to documents or result lists in a DocuWare file cabinet. Hyperlinks are inserted into the notification email to provide quick access to the documents through the DocuWare Web Client.

Setup:

1) Create a new web integration configuration by right clicking on the 'Web Integration' menu item and selecting 'New Web Integration'
2) Click the edit pencil to name the web integration
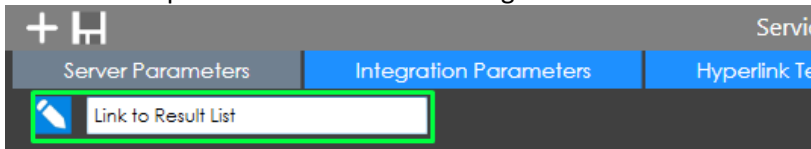
Server Parameters

This tab is used to configure a connection to the DocuWare server.

3) **Protocol** – Choose HTTP or HTTPS protocol for the integration link
4) **Server Name** – URI for the DocuWare Web Client
5) **Organization ID** – The ID of your organization. This is automatically populated
6) **Credentials** – Select Windows Login for NTLM authentication and DocuWare Login to enter a username and password. NTLM authentication will use the credentials from the recipient of the notification email.
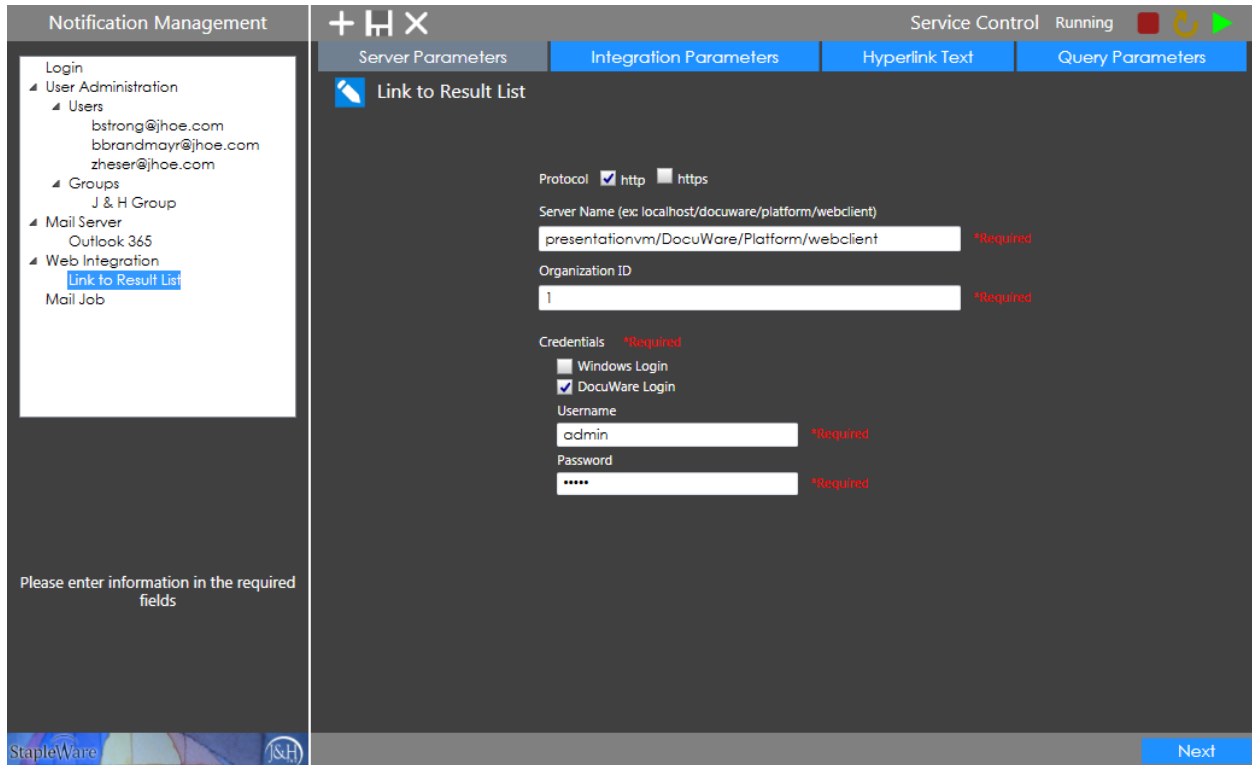
Click 'Next' to move to the 'Integration Parameters' tab.

Integration Parameters

This tab is used to configure which file cabinet and dialog to integrate with. There are also options for adding security to hyperlinks by configuring active dates and a passphrase.

7) **Viewer Option** – This configures how documents will be displayed in the DocuWare Web Client. 'Use Viewer' displays a single document, 'Download to native viewer' saves and opens the document locally, and all other options display lists of documents

8) **Search GUID** – Select 'File Cabinet' if 'Viewer Option' is 'Use Viewer'. Otherwise, select 'Result List'

9) **File Cabinet** – The file cabinet to search for documents

10) **Result List** – The dialog to use for displaying document groups. 'Result List' may be named 'Task List' or 'Search Dialog' depending on what viewer option is checked.

11) **Use Passphrase** – Add passphrase to URL for additional security. The passphrase can be found and modified in the DocuWare Administration Tool under [ORGANIZATIONNAME]->General->Web Access-> Passphrase.

12) **Valid x day(s)** – Number of days the hyperlink will be usable from the day it is created

13) **Valid from** – First day that the hyperlink will be usable

14) **Valid to** – Last day that the hyperlink will be usable
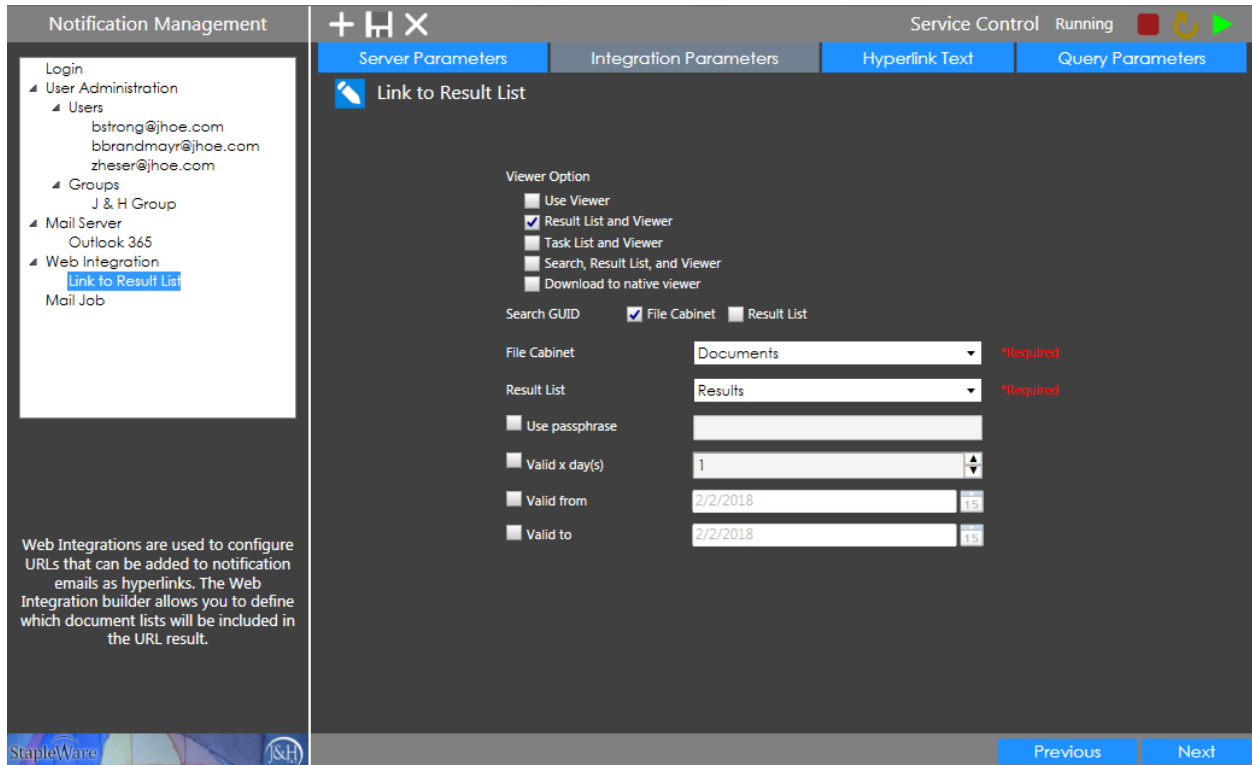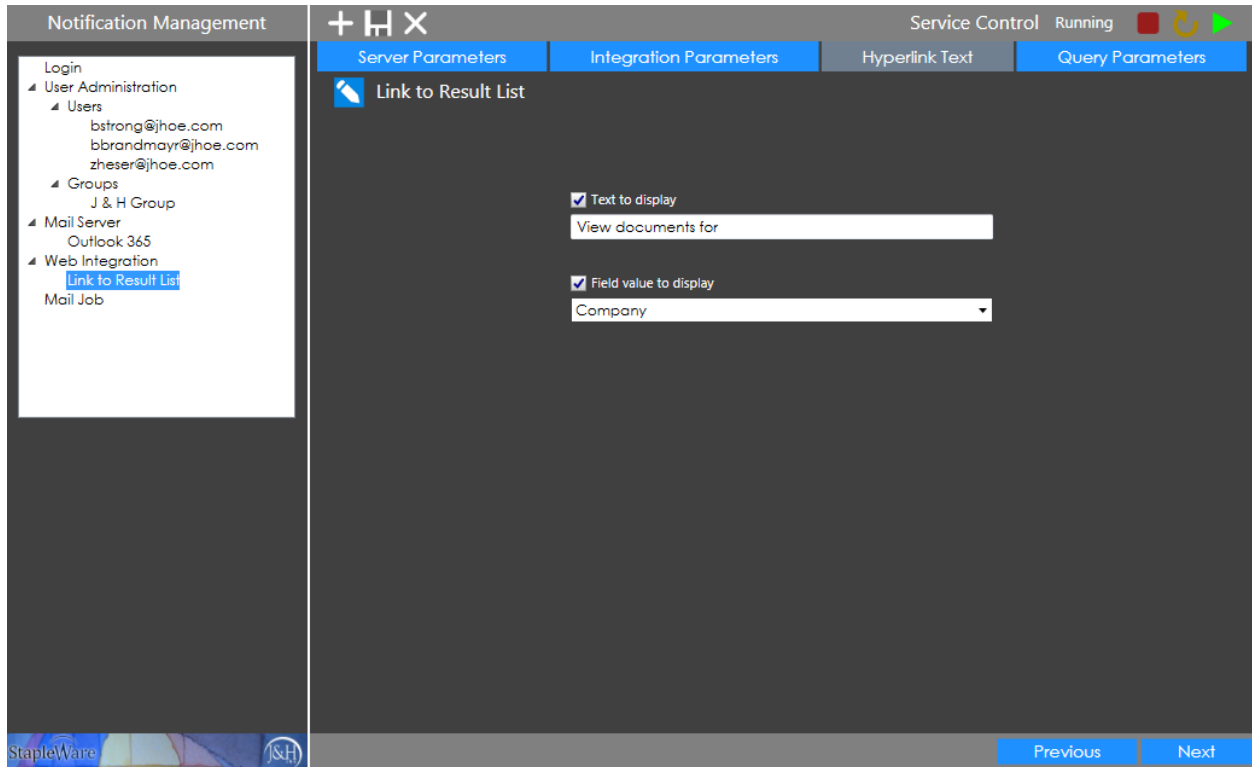
Click 'Next' to move to the 'Hyperlink Text' tab.

Hyperlink Text

This tab is used to configure how the hyperlink text will be displayed in the notification email. If no option is selected, the hyperlink will be displayed as is.

15) **Text to display** – Static text to display for hyperlink (e.g. Click here to view documents)
16) **Field value to display** – Use field values from the documents in the notification email as hyperlink text

Click 'Next' to move to the 'Query Parameters' tab.

Query Parameters

This tab is used to configure which fields the hyperlink will use to search for documents

17) **DWDOCID** – Create hyperlinks to single documents. A DWDocId may be entered in the text box for testing purposes only. Use this if 'Viewer Option' is set to 'Use Viewer' or 'Download to native viewer'.

18) **Query** – Use field values from documents in the notification email as query parameters in the hyperlink. A value may be entered in the corresponding box for testing purposes only. This can be used with all the viewer options.

19) **Test** – Test the Web Integration configuration using the 'DWDOCID' value or the 'Query' value

Click 'Save' to save this configuration

![StapleWare logo]

Standard Mail Job Configuration

Mail Jobs are used to configure templates for notification emails, specify which kinds of documents to send notifications for, and manage scheduling for automated notifications. For mail jobs that send email messages listing missing documents please skip to page 29.

Setup:

1) Create a new mail job configuration by right clicking on the 'Mail Job' menu item and selecting 'New Mail Job'
2) Click the edit pencil to name the mail job
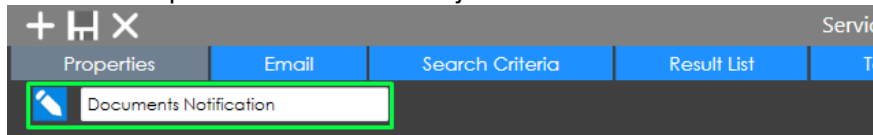
Properties
This tab is configures how the mail job uses DocuWare file cabinets, dialogs, and fields.

3) **Search Style** – Defines which types of document groupings Notification Management will search for. 'Standard Search' is for notifications about single documents. 'Group Documents' and 'Missing Documents' are for notifications about complete and incomplete groups of documents.
4) **File Cabinet** – File cabinet to look for documents
5) **Dialog** – Search dialog to use for finding documents
6) **Update Field** – Document index field to update after email is sent
7) **Update Value** – Value to write to update field
8) **Update Date Field** – Document index field to update with the date and time the email was sent
9) **Web Integration Link** – This is a list of all the web integration configurations that have been created under the 'Web Integration' menu item. Select a web integration to use for creating and inserting hyperlinks in the email
10) **Sort Order** – Sort documents by this field while constructing the email
11) **Logging** –Check 'Use Detailed Logging' for more detail in the log files.
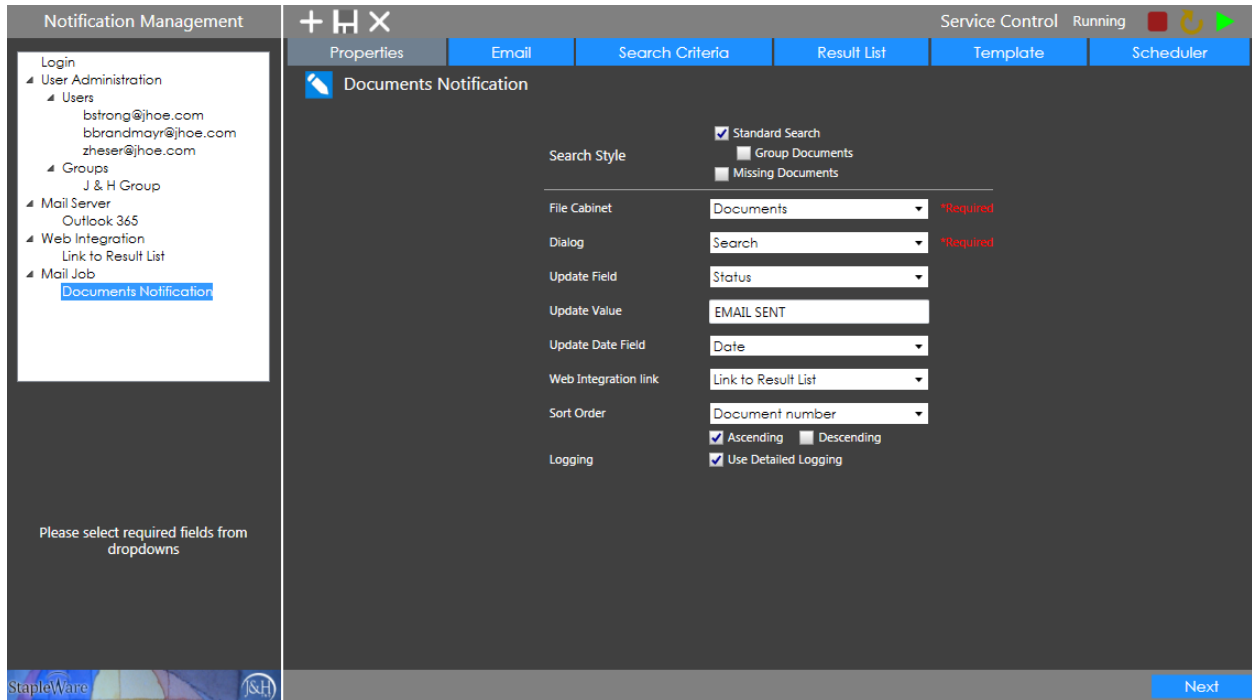
Click the 'Next' button to move to the 'Email' tab.

Email

This tab configures email properties including Server, Recipients, Subject, and Attachments.

12) **Mail Server** – A list of all the mail server configurations that have been created under the 'Mail Server' menu item. Select a mail server to relay email notifications through.

13) **Recipient** – A list of all the user and group configurations that have been created under the 'Users' and 'Groups' menu items. The selected user or group will be the recipient of all emails sent by this mail job.

    a. **Use DocuWare Field** – Select 'Use DocuWare Field' from the 'Recipient' dropdown to get the recipient email address from the document index data. Each document will be sent to the recipient(s) specified in its index data. Use the '**Recipient Grouping Field**' to choose the field that has the recipient email address.
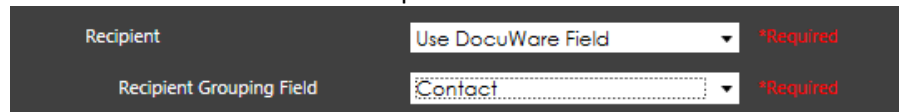
14) **Mail Subject** – Subject line of the email. Click 'Builder' to configure.

    a. Click 'Add Text' to add static text to the subject

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    b. Click 'Add Field' to add a dynamic field value to the subject line. Use this in conjunction with 'Search Style' set to 'Group Documents' or 'Missing Documents'.

    c. Click 'Reset' to reset the subject builder

    d. Click 'Cancel' to cancel any changes

    e. Click 'Save' to save changes to the subject

15) **CC** – Choose an email or group to carbon copy on the email. Check '**BCC**' to blind carbon copy.

    a. **Use DocuWare Field** – Select 'Use DocuWare Field' from the 'CC' dropdown to get the recipient email address from the document index data. Each document will be sent to the CC'd recipients(s) specified in its index data. Use the '**CC Email Field**' to choose the field that has the CC recipient email address.

16) **Administrator Email** – Email or group that error reports will be sent to.

17) **Send Attachment** – Configure attachment settings for the email

    a. **Standard Attachment** – Attach a copy of each document that is in the email

    b. **Attachment name field** – Use field value of attached document to name the attachment

    c. **Annotations** – Include annotations on documents from DocuWare

    d. **Attach from DocId(s)** – Attach additional documents from the file cabinet

        i. **DocIds** – Specify which DWDOCIDs to attach

    e. **Attach from file** – PDFs ONLY! Choose a file from the local file system to attach. If 'Standard Attachment' is checked, PDF will be merged with each document in the email as the first page and each merged document will be attached. If 'Standard Attachment' is not checked, PDF will be attached as is.

        i. **FilePath** – Choose file path to attachment PDF

18) **Make Calendar Event** – Send email as a calendar event

    a. **Organizer Name** – Document Index Field with name of event organizer

    b. **Attendee Name** – Document Index Field with name of event organizer

    c. **Start Date** – Document Index Field with event start date

    d. **End Date** - Document Index Field with event end date

    e. **All Day** – Mark whether event is all day or not

        i. **From DW** - Document Index Field with '1' or '0'

        ii. **Calculated** – Set all day if event lasts longer than X hours

    f. **Location –** Plain text location of the event

        i. **From DW -** Document Index Field with location of event

        ii. **Fixed Entry –** Enter a static value for the event location
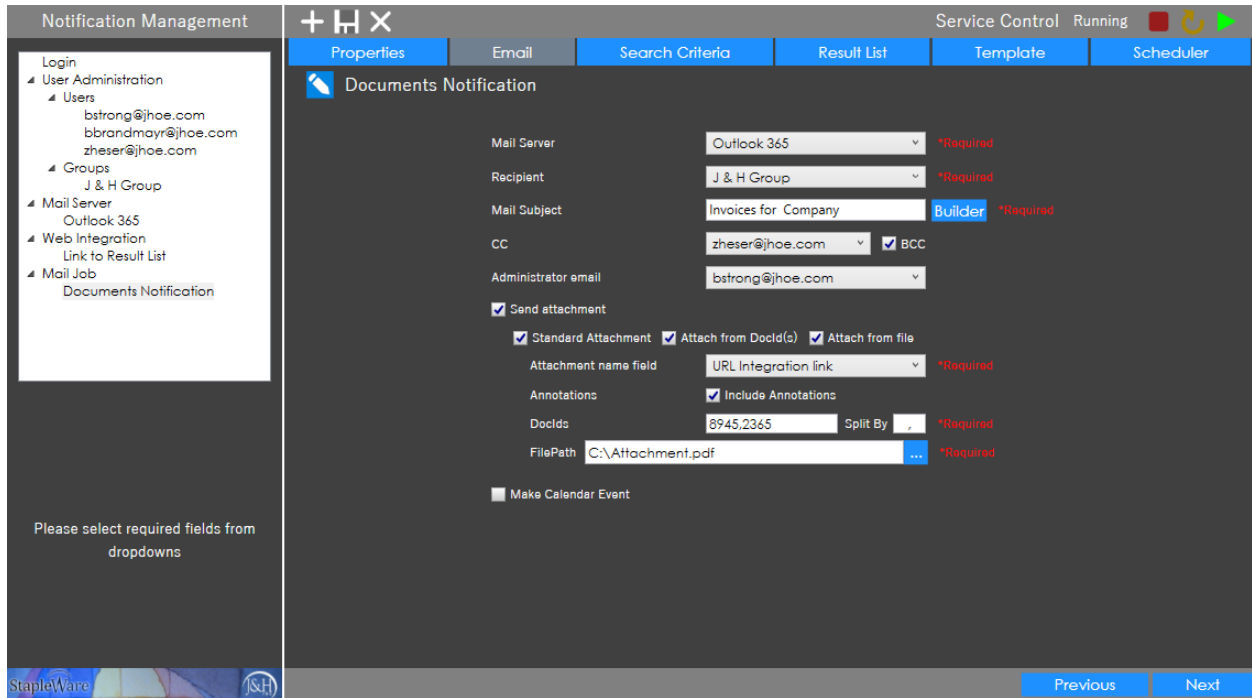
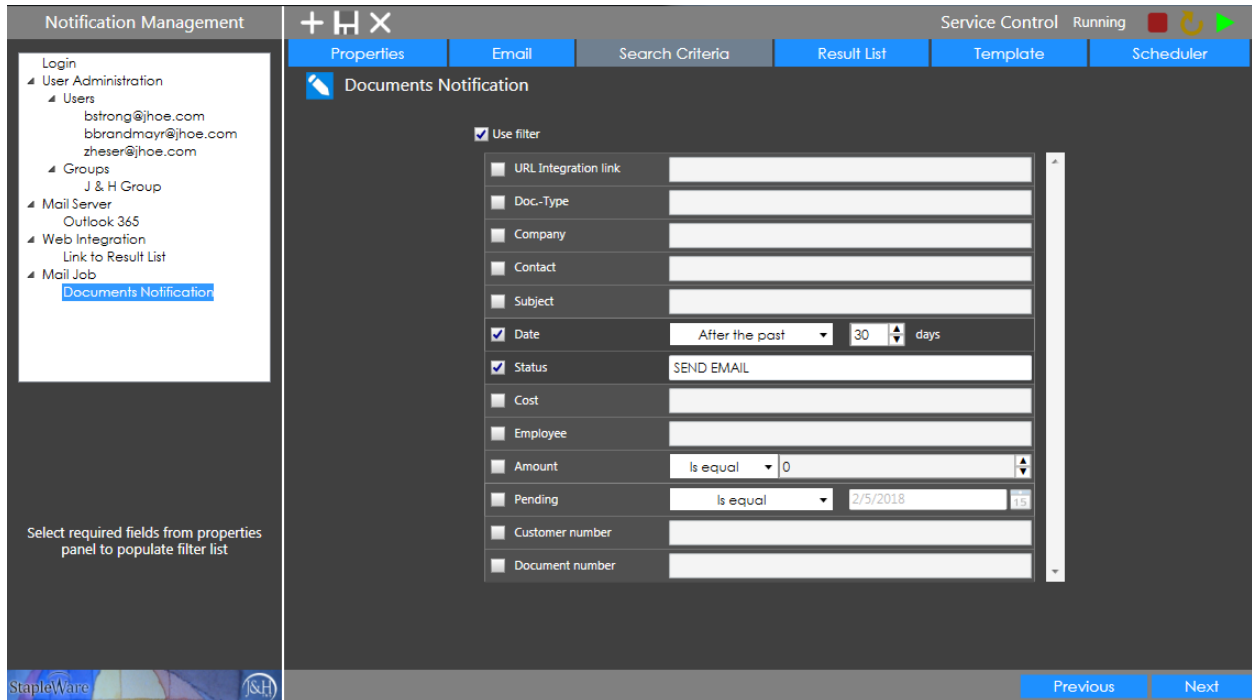Click the 'Next' button to move to the 'Search Criteria' tab.

Search Criteria

This tab is used to configure search parameters for selecting documents in the file cabinet

19) **Use Filter** – This must be selected for search parameters to be active
20) Select the checkbox next to a field to use it as a search parameter and enter a value in the corresponding textbox or date picker.

Click the 'Next' button to move to the 'Result List' tab.

Result List

This tab displays which documents are selected for the given search parameters

21) Click 'Search' to generate a list of documents for the given search criteria. These documents will be reported on in the notification email

Click the 'Next' button to move to the 'Template' tab.

NOTE:

If 'Use DocuWare Field' is selected from the 'Recipient' dropdown on the 'Email' tab, the result list will change to display documents grouped by the recipient.

Template

This tab is where templates for the header, body, and footer of the emails are configured.
There are 15 controls for editing the template:

1. **Open Template** – Open a predefined email template
2. **Save Template** – Save the current template (Saves Header, Body, and Footer)
3. **Bold** – Make text bold
4. **Italic** – Make text italic
5. **Underline** – Underline Text
6. **Font** – Change text font
7. **Font Size** – Change text font size
8. **Align Left** – Align text to the left
9. **Align Center** – Align text to the center
10. **Align Right** – Align text to the right
11. **Line Separator** – Insert a horizontal line
12. **Color** – Change text color
13. **Hyperlink** – Insert a custom hyperlink
14. **Web Integration Link** – Insert Web Integration Link for selected Web Integration configuration (works best in Body section)
15. **Insert Field** – Insert a field from the document index data (works best in Body section)
16. **Insert Missing Documents Report** – Insert a report of which select list values are missing from a document group
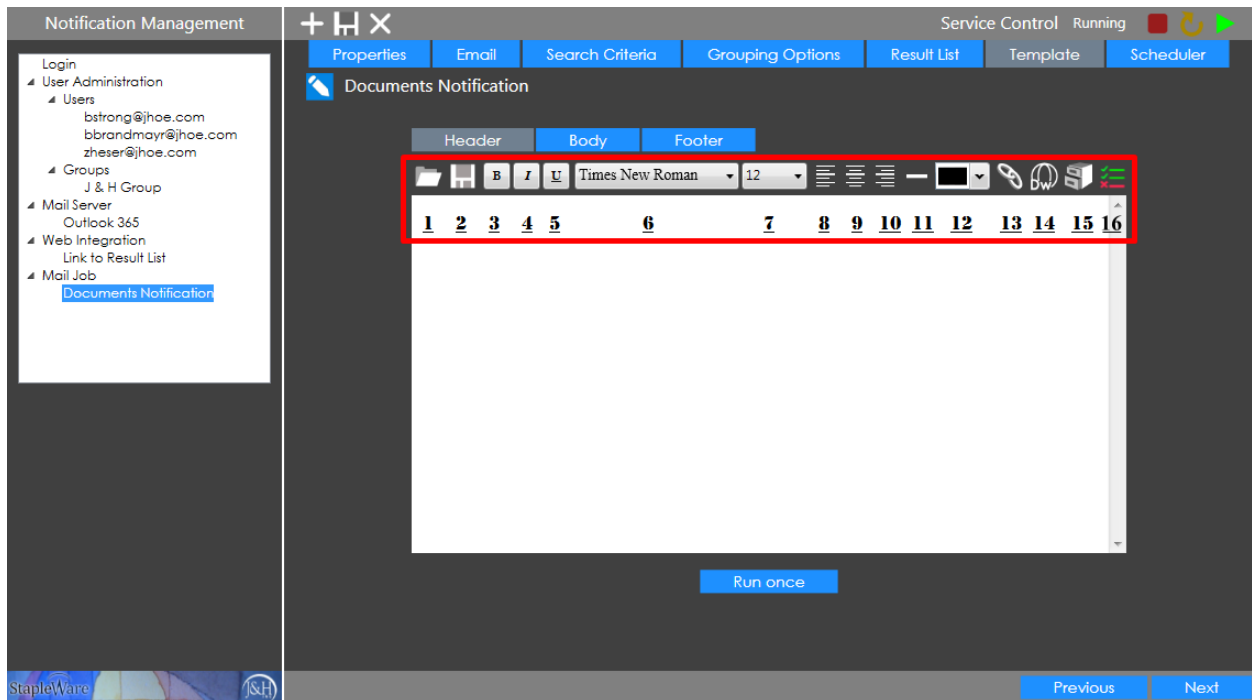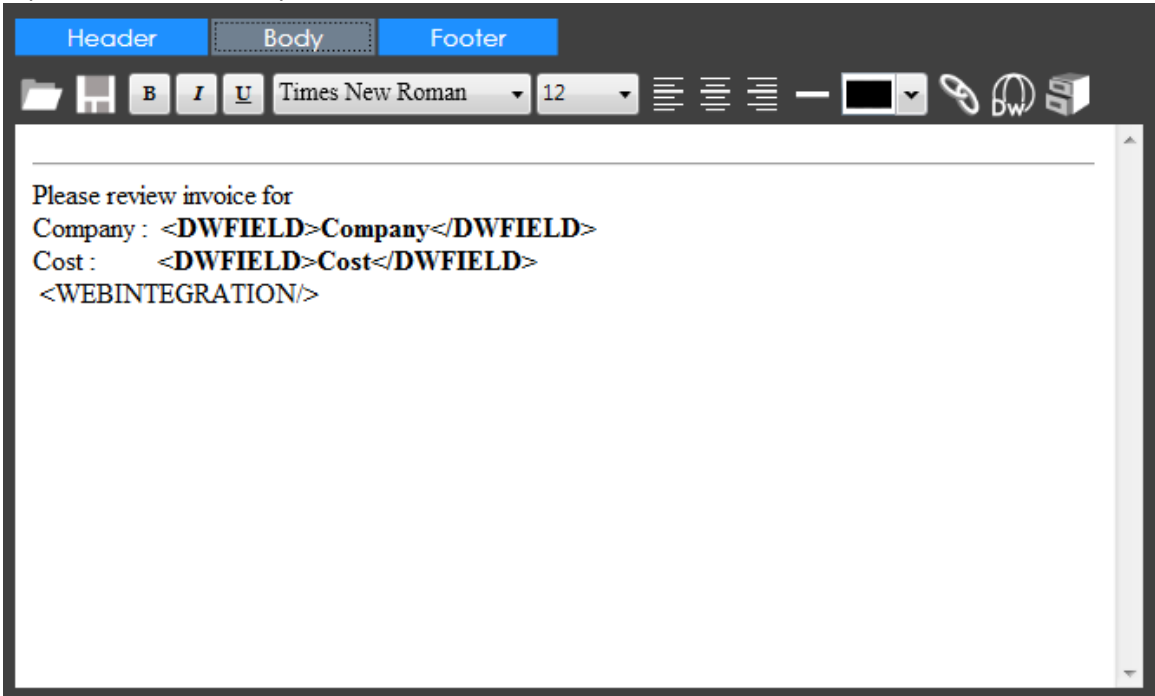
22) **Header** – The Header section is used once at the top of each notification email. Use this for any introductory text.
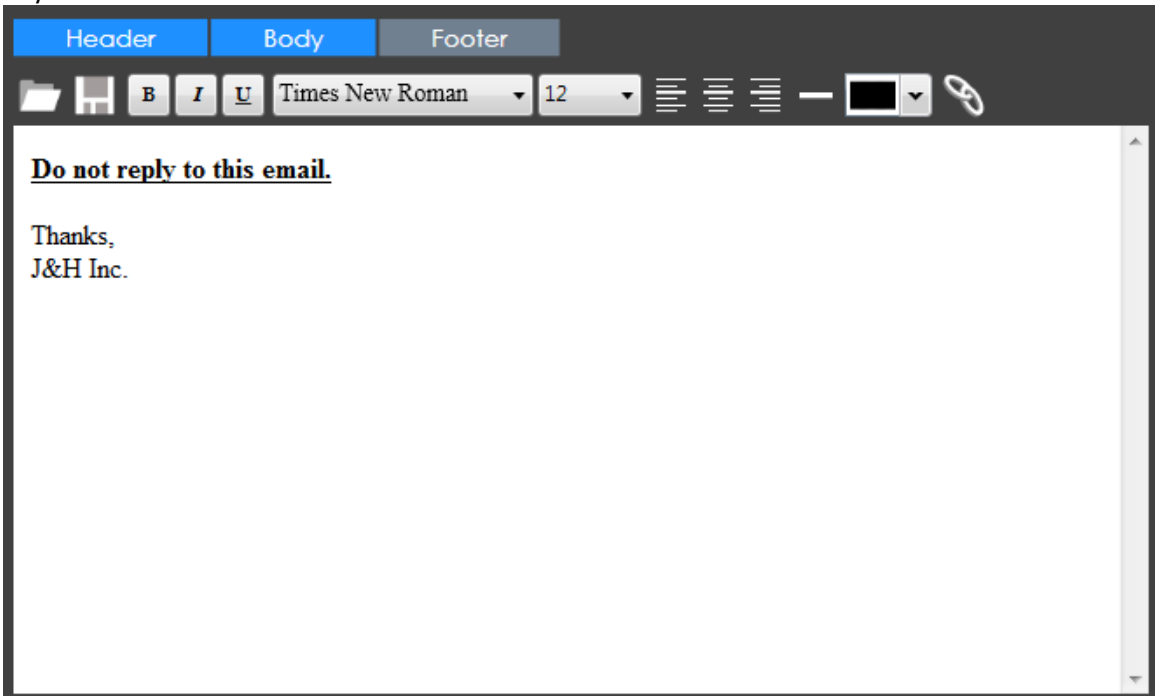
23) **Body** – The Body section is used for displaying index data for the documents. This section will be repeated once for every document in the result list.

24) **Footer** – The Footer section is used once at the bottom of each notification email. Use this for any final remarks.

25) **Run Once** – Click 'Run Once' to manually run the Mail Job and test the configuration.

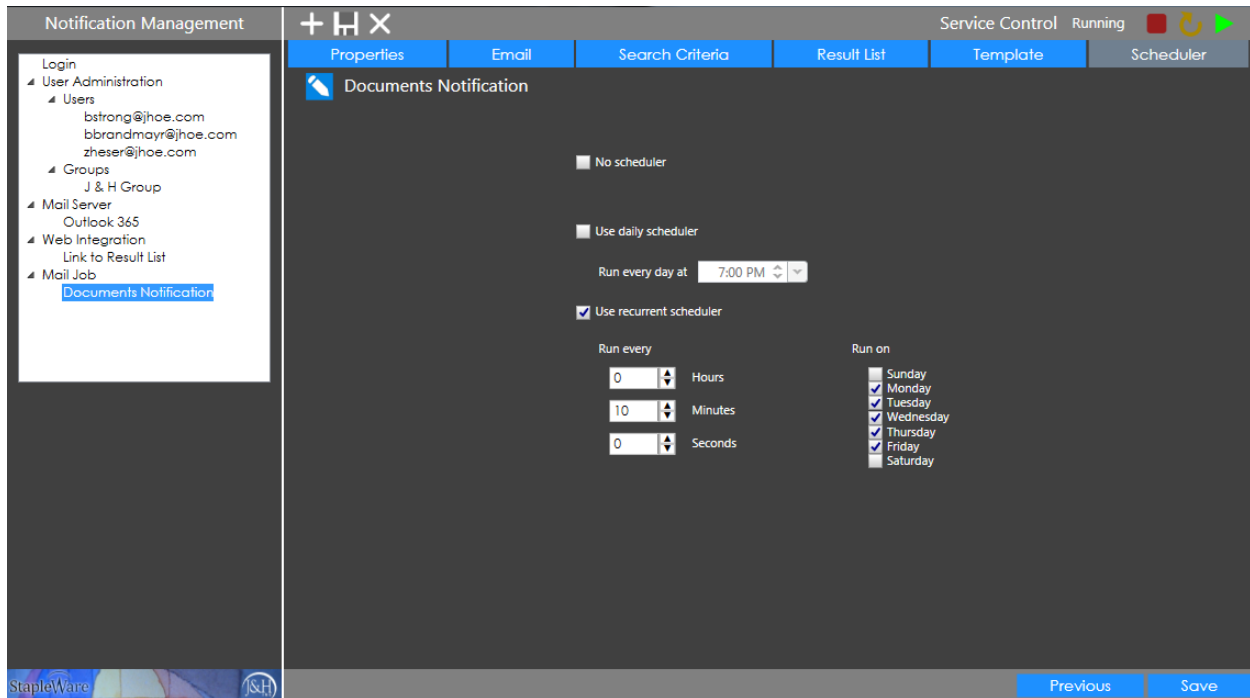Click the 'Next' button to move to the 'Scheduler' tab.

Scheduler

This tab is used to schedule the job to run automatically according to a defined schedule

26) **No schedule** – The schedule is turned off for this job
27) **Use daily scheduler** – Run this job once every day at a specified time
28) **Use recurrent scheduler** – Run this job on specified days at a fixed time interval

Click the 'Save' button to save the Mail Job.

Example

Here are three examples of the types of emails Notification Management will send for documents in a DocuWare file cabinet.

DocuWare Web Client View

> This is the list of test documents for sending a Standard email, Completed Group email, and Missing Documents email.

Standard Email

> The body section of the email is repeated for each document with a status of 'SEND EMAIL'. The Company and Date are inserted from each document's index fields. A hyperlink to a result list is included with every document report.
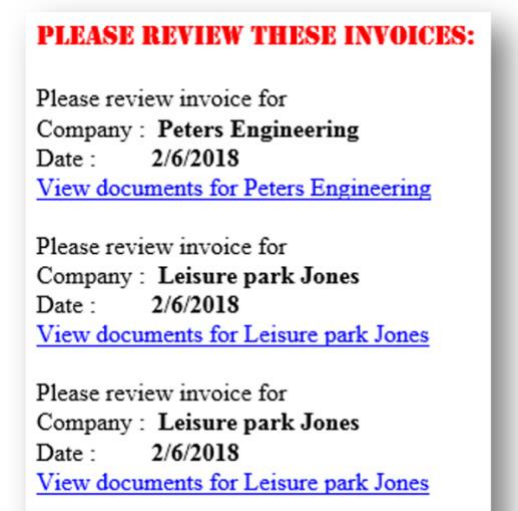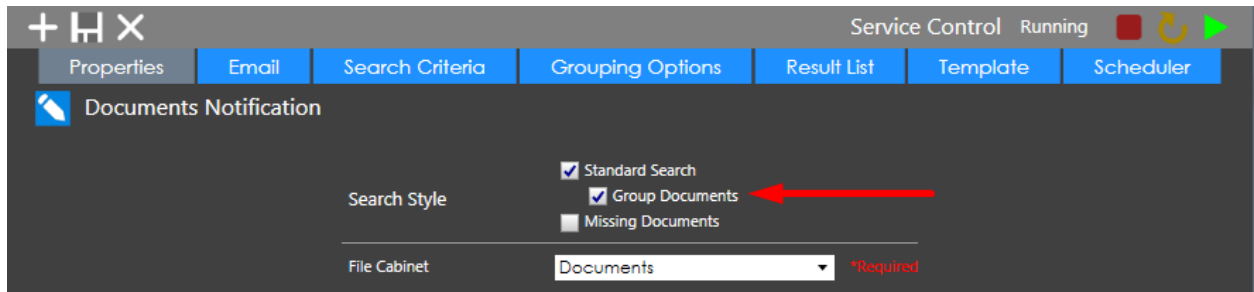
Grouped Mail Job Configuration

Grouped Mail Jobs are used send notifications about completed groups of documents in a DocuWare file cabinet. The instructions in this section only show the changes between a Grouped Mail Job and a Standard Mail Job.
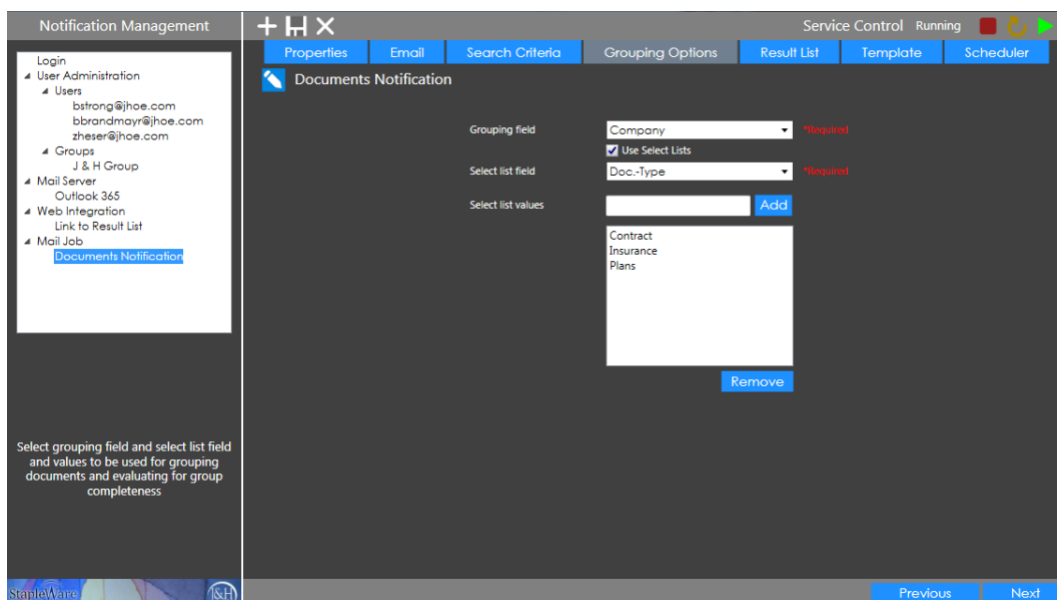
Properties

Check 'Group Documents' to enable document grouping

Grouping Options

Use this tab to configure document grouping and select lists for checking completeness

1) **Grouping Field** – Field for grouping documents together. For example, if 'Company' is selected then all documents from the same company will be grouped together.
2) **Use Select List** – Once documents are grouped, check if group is complete. For example, if documents are grouped by 'Company' verify all Doc. Types are in the group before sending a notification email.
3) **Select List Field** – Index field to check for select list values
4) **Select List Values** – All the values expected to be in the select list field of the grouped documents. This list may be modified using the 'Add' and 'Remove' buttons.

Missing Documents Mail Job Configuration

Missing Documents Mail Jobs are used send notifications about incomplete groups of documents in a DocuWare file cabinet.

Properties Tab

Check 'Missing Documents' to enable incomplete group check. Select the file cabinet where the documents are being collected. Email messages will be sent from this file cabinet to a recipient. It would be a good idea to add a 'Email Status' field to the file cabinet. In this way, when an email is sent, a status field can be updated to reflect the fact that the email has been sent from the file cabinet.

We do not recommend that you use a Web Integration Link because this email is showing documents that do not exist in the file cabinet. There is no reason to look for documents that are not in the file cabinet.
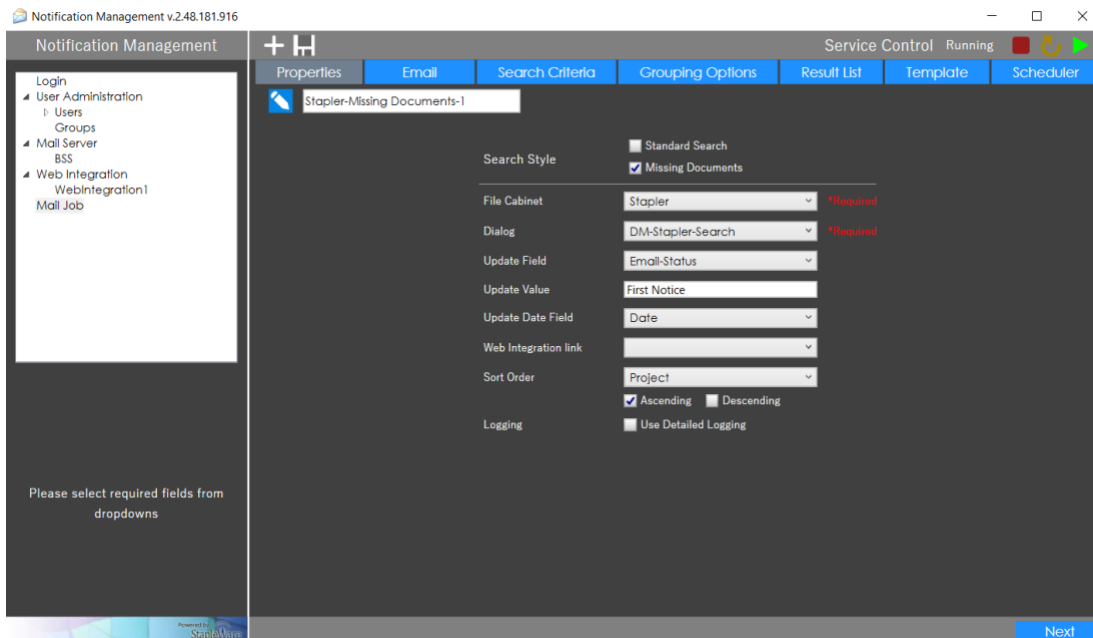
Email Tab

Use this tab to select the recipient of the email messages. The recipient can either be a user that been setup in the Deficiency Manager or an email address listed in a field in the file cabinet.
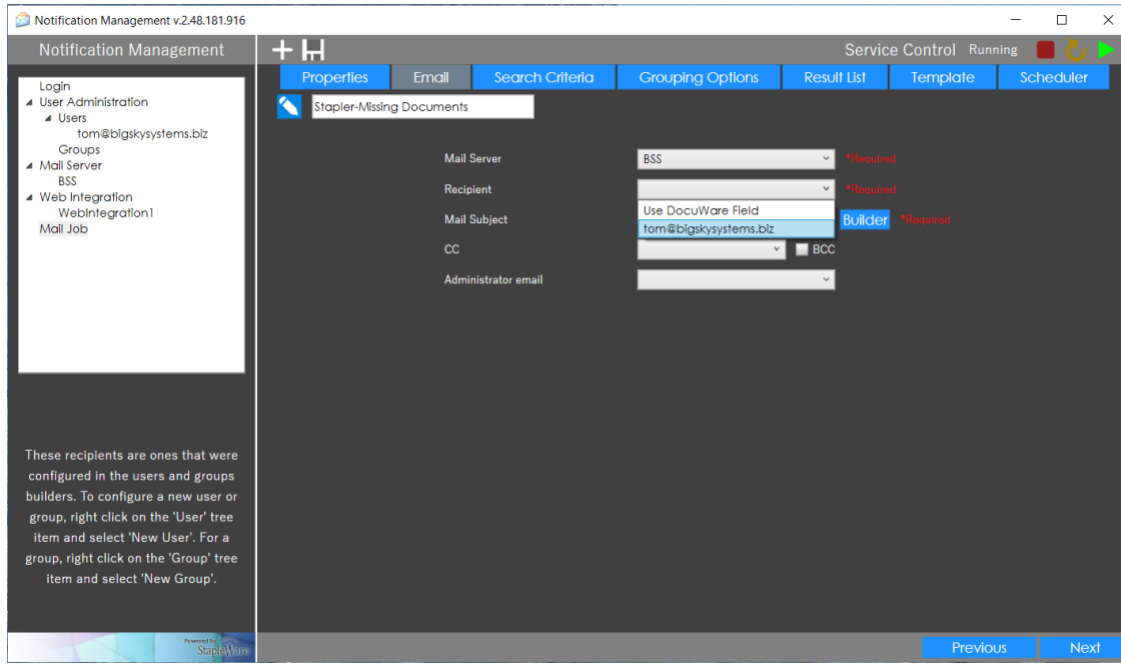

Use the 'Builder' button next to the Mail Subject field to create the email that will be sent. The **Email Subject** has the ability to add text and fields from the file cabinet. Remember, this is just the Subject line of the email. The body of the email will be built next. An email may be sent to a CC or to an Administrator.
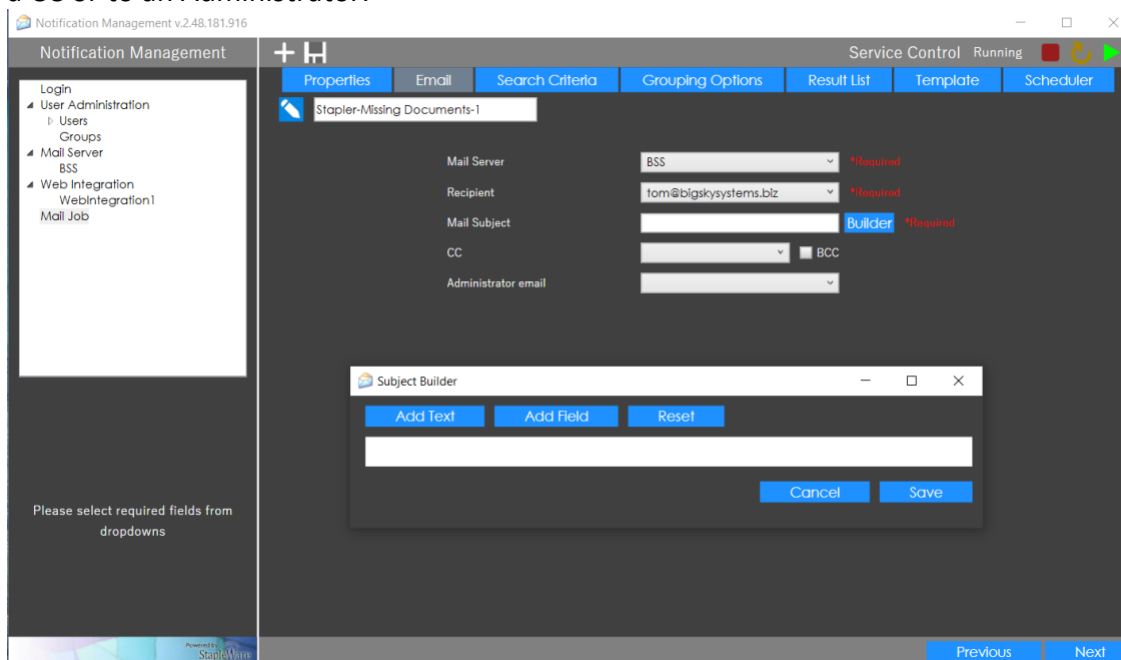
Search Criteria Tab

The Search Criteria will allow the administrator to filter the documents that will be included in the email batch. When using the Deficiency Manager we use a filter on the Status field (NOT = COMPLETE) so that only groups of documents that are NEW or INPROCESS are listed in the Deficiency Manager Result List. In the same way the number of documents that the program needs to work with can be trimmed down by filtering out the Completed document groups.

When we use Selective Select Lists (Second Level Groups) we will need to create a separate template for each Grouping field.
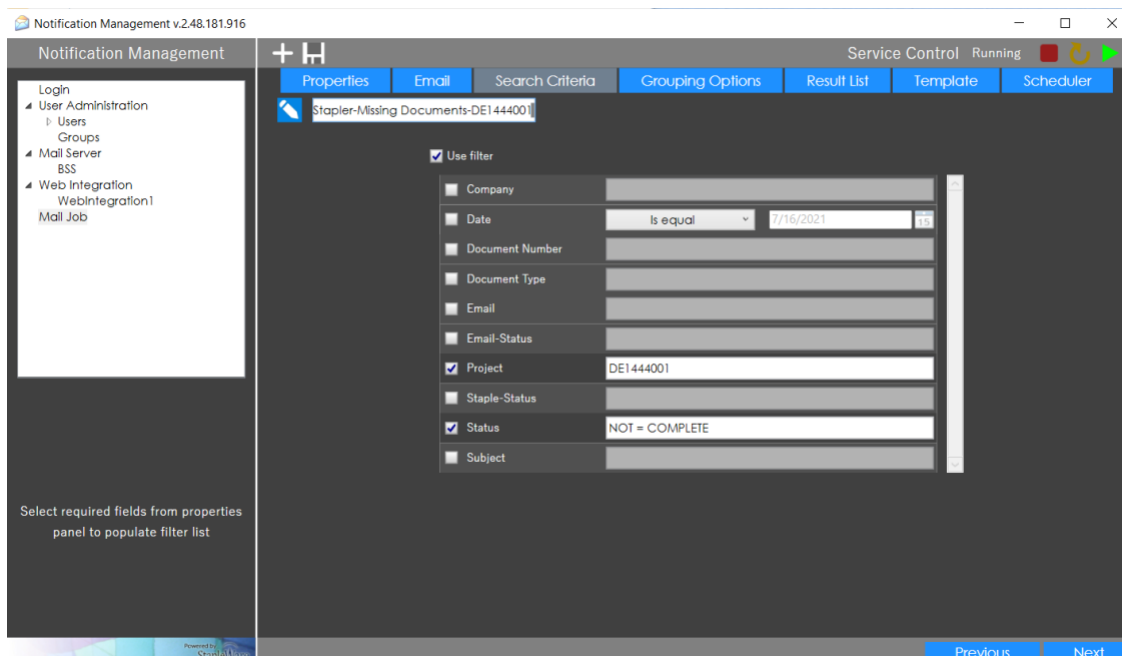

Grouping Options Tab

Use this tab to configure document grouping and select lists for checking completeness

5) **Grouping Field** – Field for grouping documents together. For example, if 'Company' is selected then all documents from the same company will be grouped together. In this case the Project field is selected

6) **Select List Field** – Index field that contains the DocuWare Select List that lists the documents required for each group.

7) **Select List Values** – All the values expected to be in the select list field of the grouped documents. This list may be modified using the 'Add' and 'Remove' buttons.
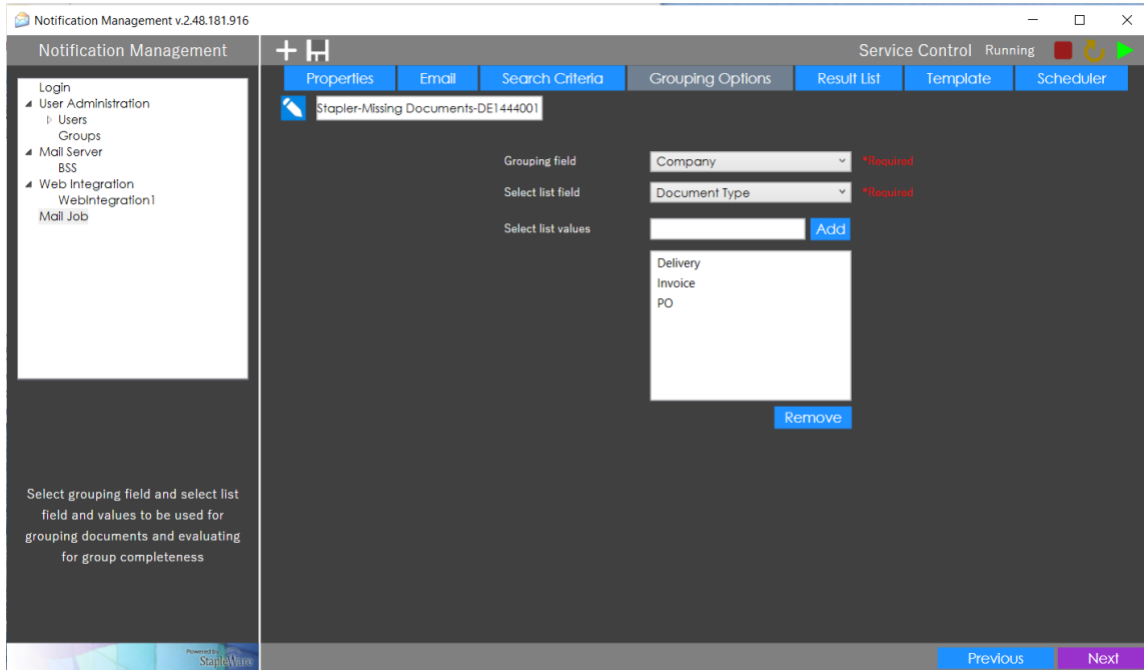
Here is the Deficiency Manager Result List showing missing documents for a group.
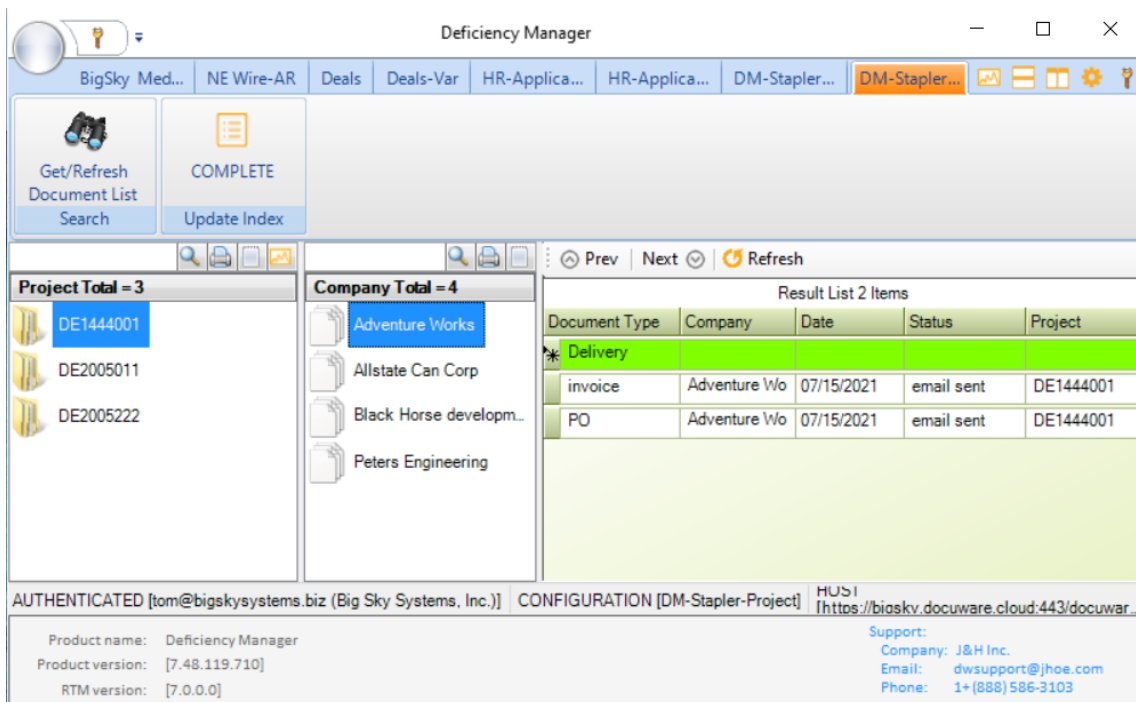
Result List Tab

The Result List Tab will allow you to view the document groups that are affected by the configuration. Please note that the Documents that will be listed are documents that exist in the file cabinet. When the configuration runs, the email will only show the documents that are missing from the group.

Click on the arrow next to any group to see the documents in the group.
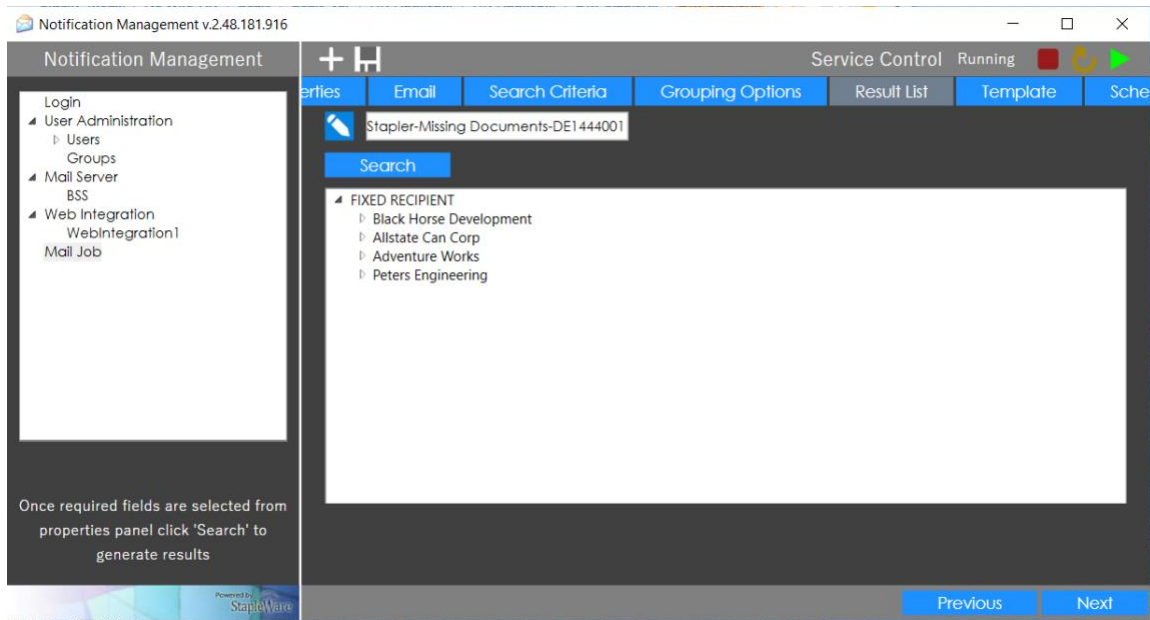
Template Tab

The Template Tab allows the administrator to design the email body that will be sent. The email body consists of three parts, Header, Body and Footer.

Header:

The Header has prepopulated text that you can erase. Typically the header will say:

"Please review the following documents and attempt to add them to the DocuWare file cabinet as soon as possible. Thank you."
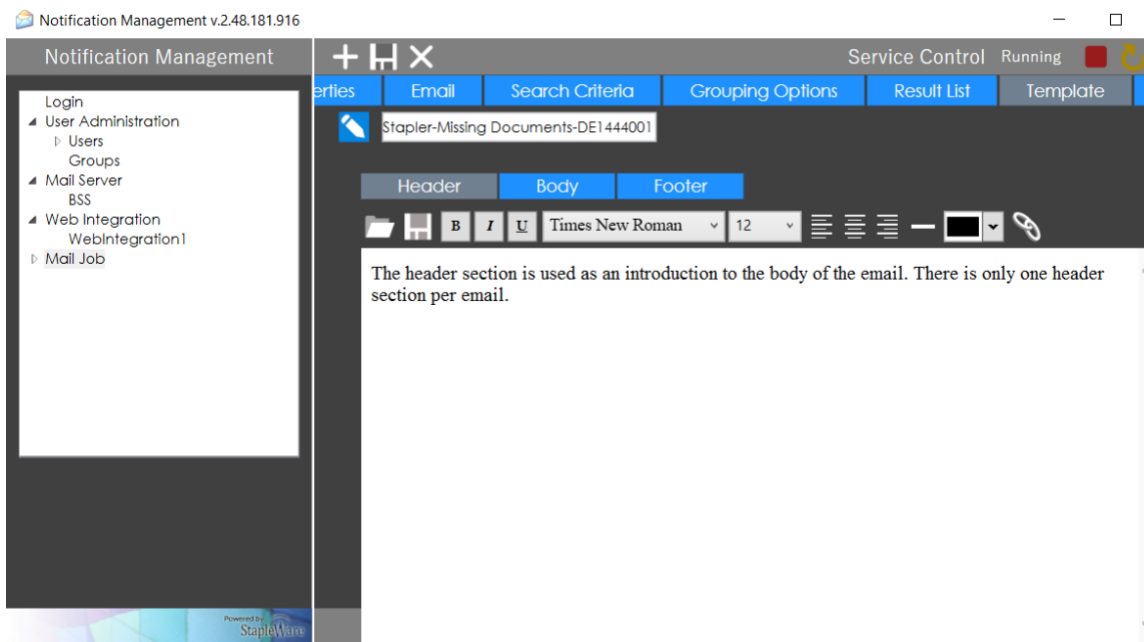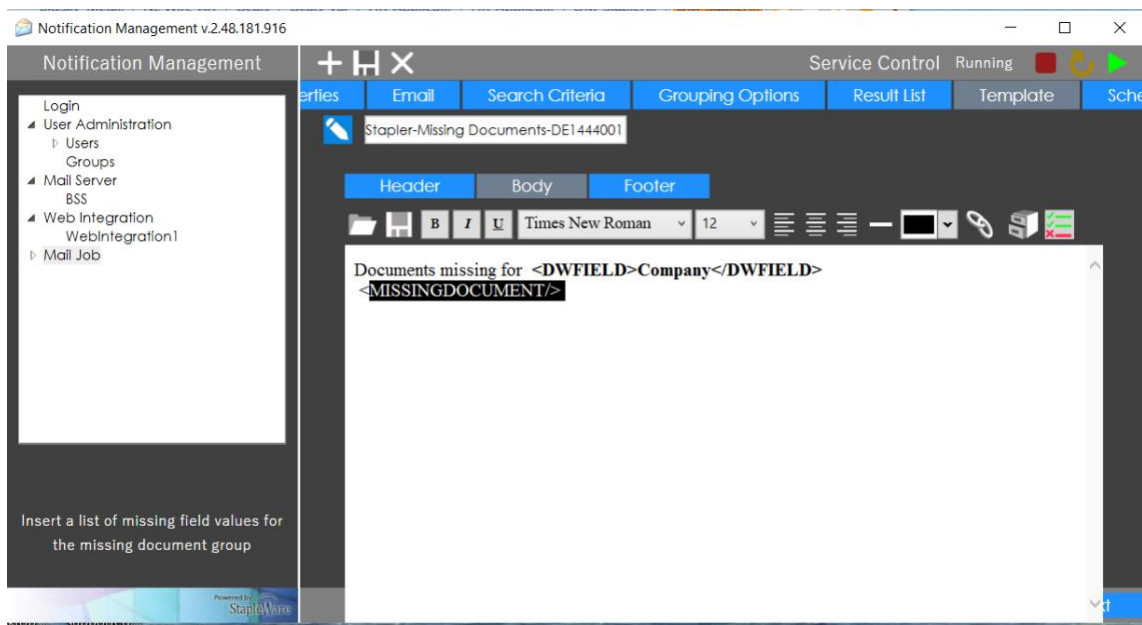
Body:

The Body Tab is the template that provides the format for the body of the email. It will contain the field values for the Grouping Field (in this case the Company) and will list the missing documents for each Group.

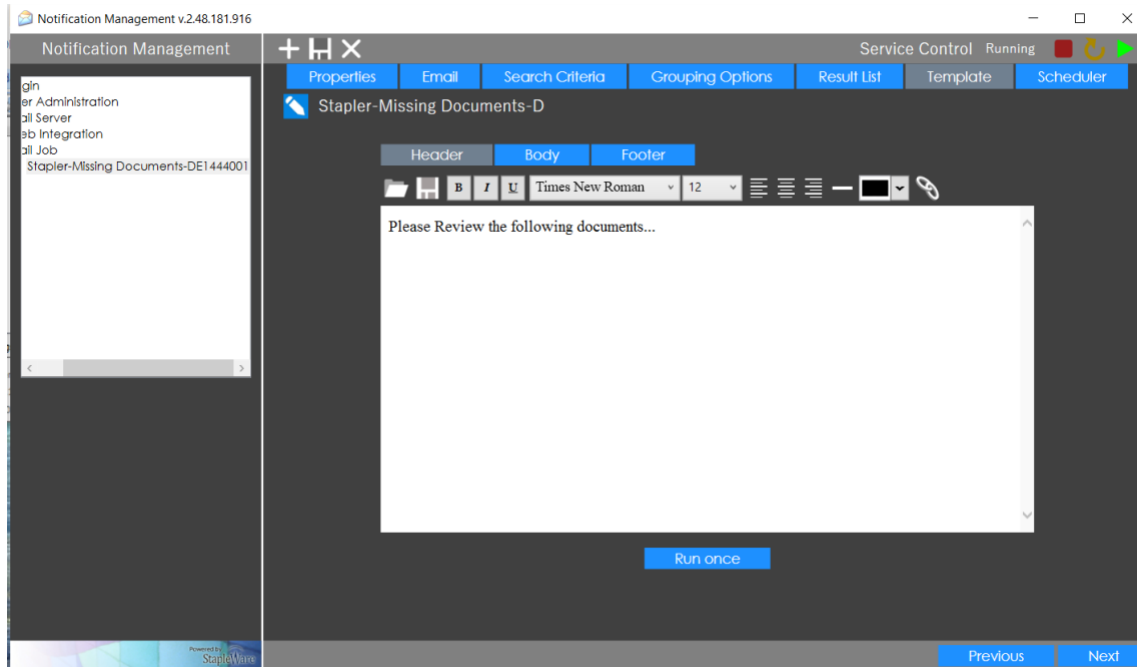Use the File Cabinet Icon to select the Grouping Field.
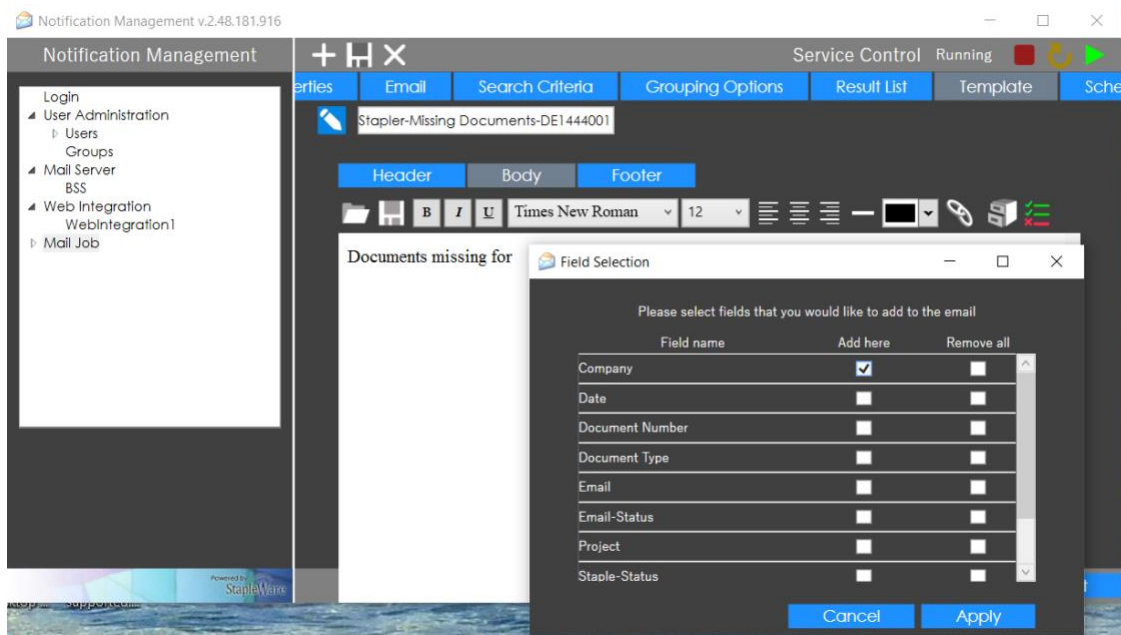
Use the Check Mark icon to select the location for the missing document list for each group.

Footer:

The footer is used to close the body of the email. Typically it would say:

"Thank you for your help. If you have questions, please call 888-555-1212."

You can now click RUN ONCE to test the template.

![StapleWare logo]

Scheduler Tab

This tab is used to schedule the job to run automatically according to a defined schedule

29) **No schedule** – The schedule is turned off for this job
30) **Use daily scheduler** – Run this job once every day at a specified time
31) **Use recurrent scheduler** – Run this job on specified days at a fixed time interval
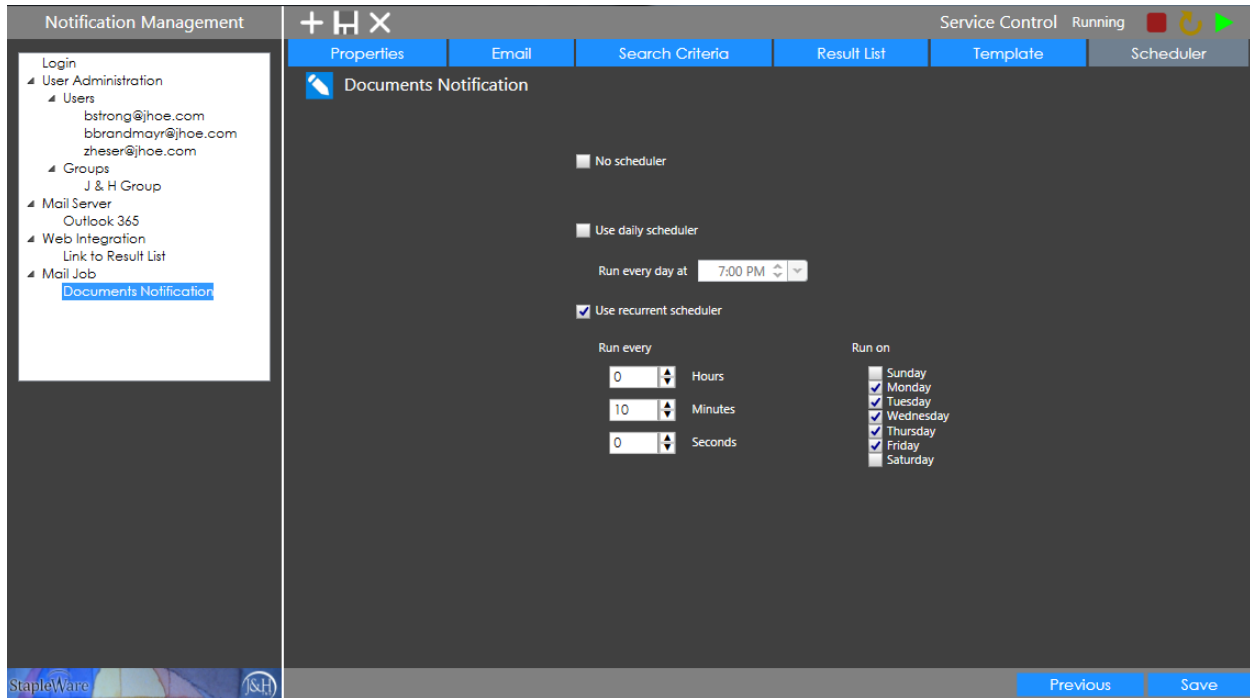
Click the 'Save' button to save the Mail Job.

Missing Documents Email

The documents in this email were grouped by COMPANY and the select list field is the Document Type field. The select list is 'Delivery, Invoice, PO'.

The body section displays the Company and a list of document types that are missing