

DocMinder[®] User Guide

ARC Setup

Version 56XX

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DocMinder ARC Setup

Version 5.6.X.X

This guide describes the procedure to setup DocMinder® and the ARC (Automatic Reminder Creation) Module.

If you run into difficulties or have a question, you can email Technical support at support@wordtech.com, or contact us by phone at (913) 722-3334.

Launch WebAdmin

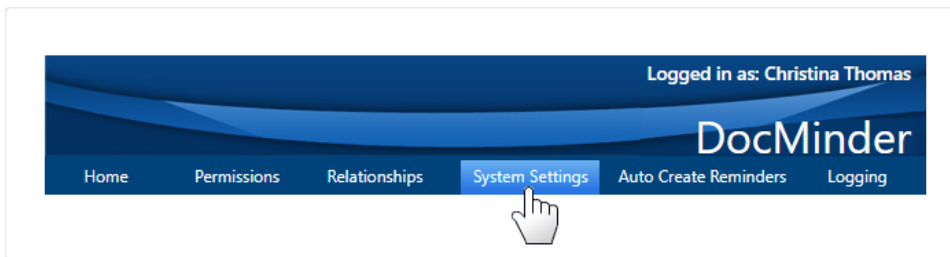
Launch the DocMinder® **Web Admin** from the WebClient application; or, through the Desktop Client application.

Web Admin >> Integrated Systems

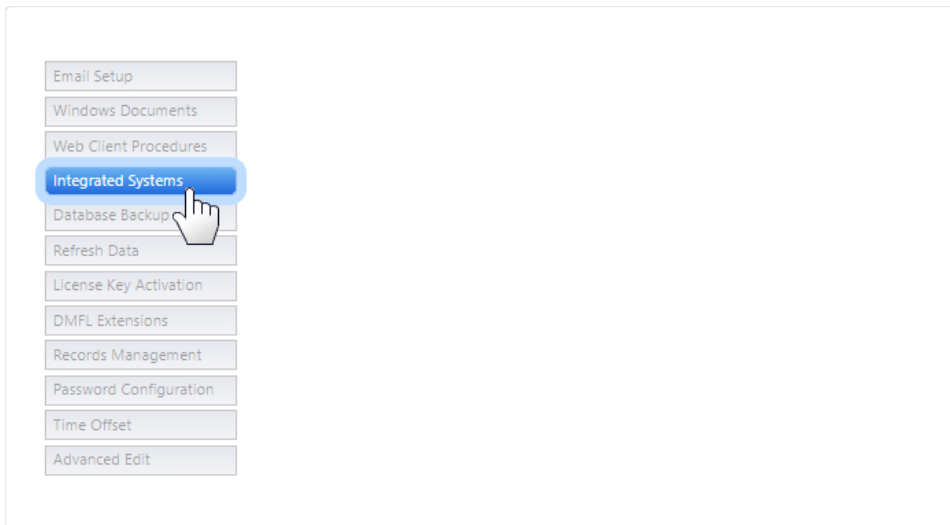
DocMinder® provides integration with a variety of systems and applications.

The **Integrated Systems** section is used to configure connections to document stores (e.g., document management systems) within the DocMinder® application.

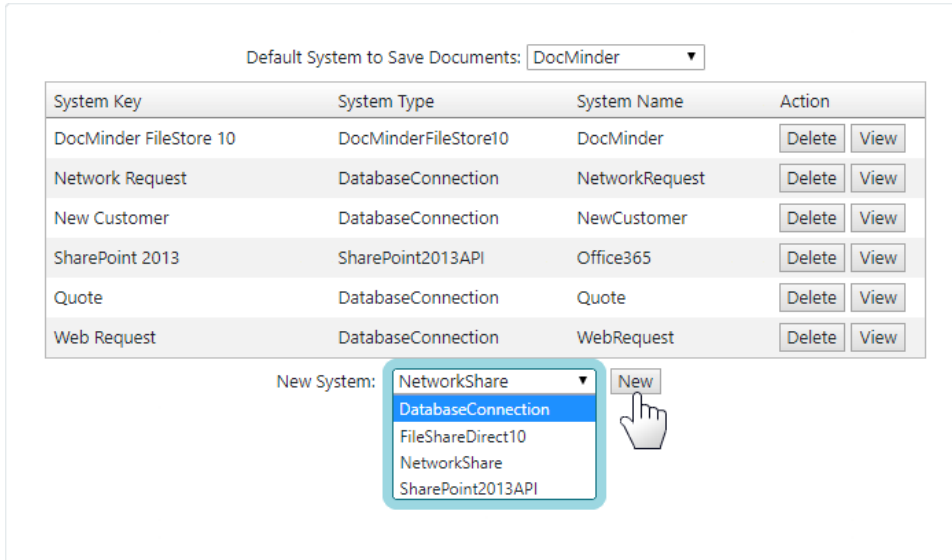
1. Click on **System Settings** from the Top-Navigation bar;



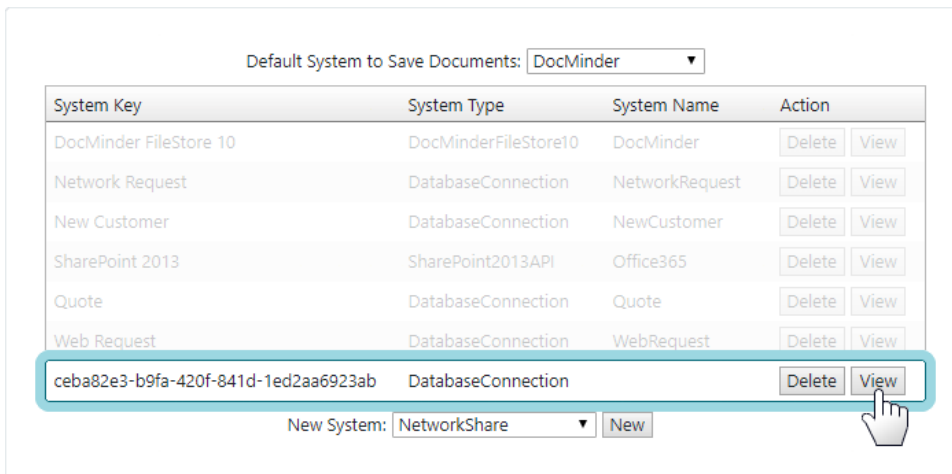
2. Then click on **Integrated Systems** from the Left-Navigation menu.



3. Select **DatabaseConnection** from the dropdown and click the **New** button.



4. Click on **View** from the column labeled **Action** in the table.



Integrated System View:

The **Integrated System View** page displays more configuration settings (e.g., database properties, values, etc.) for systems you wish to integrate with DocMinder®.

[Return to Integrated Systems](#)

System ID: **1** System Name:

System Type: **2** System Key:

[Advanced Command Properties](#)

DM System Settings:

Property	Description	Value	
DBProviderType		DBProviderType.OleDb or DBProvider	3
Data Source	Name of SQL Server Instance	zeus	4
Initial Catalog	Database Name	db_docminder5_prod	5
User ID	Database Username	docminder5	6
Password	Database Password	*****	7
FileShareDomain	File Share Domain		8
FileShareUsername	File Share Username		9
FileSharePassword	File Share Password		10

1	Data Source: The Database Server hosting the Database.
2	Initial Catalog: SQL database name for the system.
3	User ID: A SQL login account with at least read access to the database.
4	Password: SQL password for the database user account.
5	File Share Domain: N/A.
6	File Share Username: N/A.
7	File Share Password: N/A.

Advance Command Properties:

- 5. Click on the **Advance Command Properties** link.

[Return to Integrated Systems](#)

System ID: System Name:

System Type: System Key:

Advanced Command Properties

DM System Settings:

Property	Description	Value
DBProviderType		<input type="text" value="DBProviderType.OleDb or DBProvider"/>
Data Source	Name of SQL Server Instance	<input type="text" value="zeus"/>

- 6. Enter the **SQL Query** for extracting the necessary data. This will populate the **SQL** necessary to extract information from the system.

[Return to Edit ExpenseReport](#)

Query Command:
This query must return a field column ReferenceNumber

```
SELECT [Id] as [ReferenceNumber]
, [submitted_id]
, [submitted_name]
, [submitted_email]
, [category]
, [department]
, [importance]
, [Date]
, [submittedDate]
, [Body]
, [Document_id]
, [DocMinder]
FROM [Id] as [web_expense]
```

Update Command:
Three parameters pass to this query: @ReferenceNumberInteger, @ReferenceNumberString and @ReminderID

[Load Default Commands](#) (Command must be blank)

Optional Reference Number:

7. Then enter the **Query** for updating the record when a DocMinder® is created.

[Return to Edit ExpenseReport](#)

Query Command:
This query must return a field column ReferenceNumber

```
SELECT [Id] as [ReferenceNumber]
, [submitted_id]
, [submitted_name]
, [submitted_email]
, [category]
, [department]
, [importance]
, [Date]
, [submittedDate]
, [Body]
, [Document_id]
, [DocMinder]
FROM [Id] as [web_expense]
```

Update Command:
Three parameters pass to this query: @ReferenceNumberInteger, @ReferenceNumberString and @ReminderID

```
update [web_expense] set [docminder] = @reminderid where id = @ReferenceNumberInteger
```

[Load Default Commands](#) (Command must be blank)

Optional Reference Number:

8. Click the **Save** button and then click **Test**.

[Return to Edit ExpenseReport](#)

Query Command:
This query must return a field column ReferenceNumber

```
SELECT [Id] as [ReferenceNumber]
, [submitted_id]
, [submitted_name]
, [submitted_email]
, [category]
, [department]
, [importance]
, [Date]
, [submittedDate]
, [Body]
, [Document_id]
, [DocMinder]
FROM [Id] as [web_expense]
```

Update Command:
Three parameters pass to this query: @ReferenceNumberInteger, @ReferenceNumberString and @ReminderID

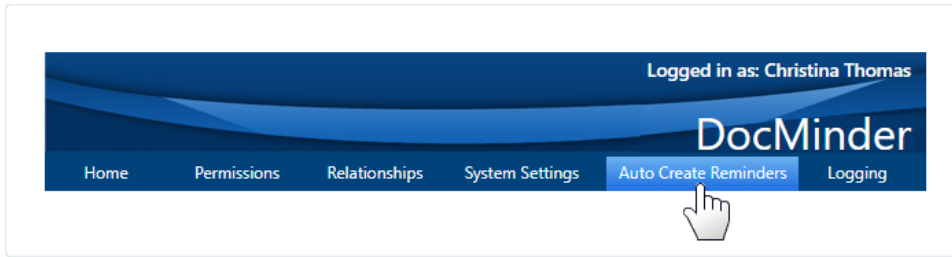
```
update [web_expense] set [docminder] = @reminderid where id = @ReferenceNumberInteger
```

[Load Default Commands](#) (Command must be blank)

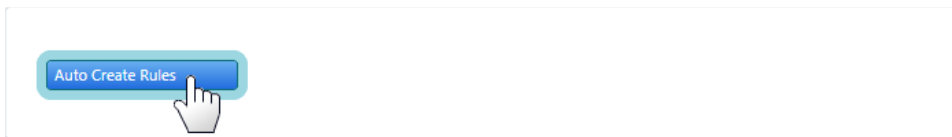
Optional Reference Number:

ARC Rule Setup

1. Click on **Auto Create Reminders** from the Top-Navigation bar.



2. Then click on **Auto Create Rules** from the Left-Navigation menu.



3. Select the name of the integrated system you created and click **New Rule**.

The screenshot shows a table of existing rules and a dropdown menu for creating a new rule. The table has columns for Rule Name, Status, DM System, Copy, Link, and Action. The dropdown menu is open, showing a list of system names with 'ExpenseReport' selected.

Rule Name	Status	DM System	Copy	Link	Action
Auto Filing Contract	Active	eDOCS	<input type="checkbox"/>	<input type="checkbox"/>	Delete Edit
Capital Expenditure Request	InActive	CER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Delete Edit
Contract Request	Active	Contract_Request	<input type="checkbox"/>	<input type="checkbox"/>	Delete Edit
Employee Separation	InActive	Employee_Separation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Delete Edit
Legal Hold	Active	Web_Legal_Hold	<input type="checkbox"/>	<input type="checkbox"/>	Delete Edit
New Business Intake	InActive	NBI	<input type="checkbox"/>	<input type="checkbox"/>	Delete Edit
Project Budget	Active	ProjectBudget	<input type="checkbox"/>	<input type="checkbox"/>	Delete Edit
Training_Request	Active	Web_Training_Request	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Delete Edit
Vacation Request	Active	Web_Vacation_Request	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Delete Edit

New Rule dropdown menu items: CER, Auto_Filing, CER, Contract_Request, Employee_Separation, ExpenseReport (selected), Legal_Hold, NBI, ProjectBudget, Training_Request, Vacation_Request.

4. Click **Edit**.

Rule Name	Status	DM System	Copy	Link	Action
Auto Filing Contract	Active	eDOCS	<input type="checkbox"/>	<input type="checkbox"/>	Delete Edit
Capital Expenditure Request	InActive	CER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Delete Edit
Contract Request	Active	Contract_Request	<input type="checkbox"/>	<input type="checkbox"/>	Delete Edit
Employee Separation	InActive	Employee_Separation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Delete Edit
Legal Hold	Active	Web_Legal_Hold	<input type="checkbox"/>	<input type="checkbox"/>	Delete Edit
New Business Intake	InActive	NBI	<input type="checkbox"/>	<input type="checkbox"/>	Delete Edit
Project Budget	Active	ProjectBudget	<input type="checkbox"/>	<input type="checkbox"/>	Delete Edit
Training_Request	Active	Web_Training_Request	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Delete Edit
Vacation Request	Active	Web_Vacation_Request	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Delete Edit
Expense Report	InActive	ExpenseReport	<input type="checkbox"/>	<input type="checkbox"/>	Delete Edit

New Rule CER

5. Enter a descriptive **Rule Name** (e.g., Project Expense Report).

Create New Rule

Rule Name: Template:

Status: Exec Order:

From: or Column

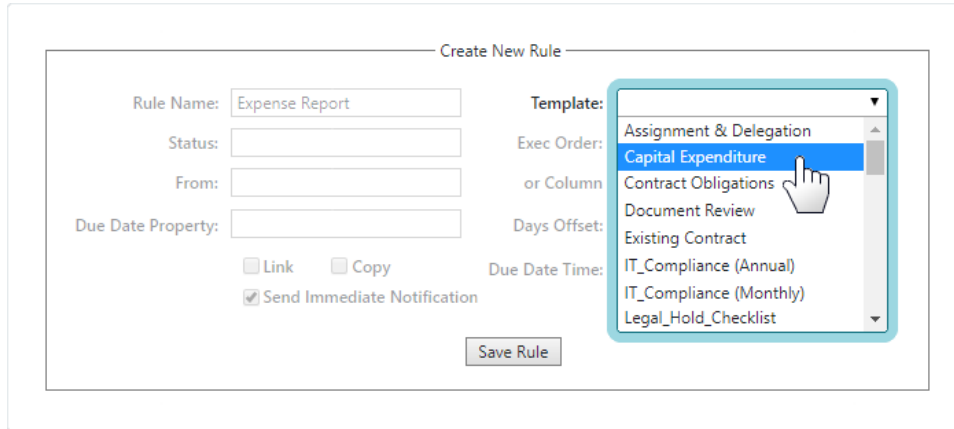
Due Date Property: Days Offset:

Link Copy Due Date Time:

Send Immediate Notification

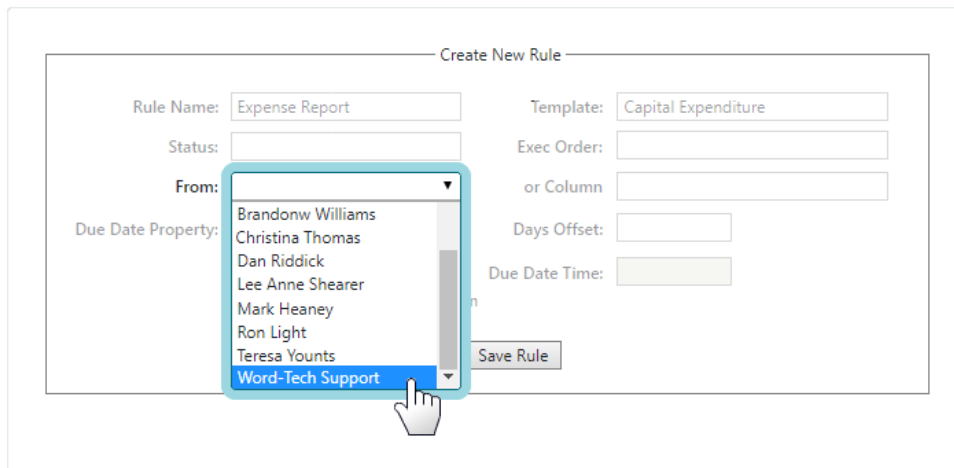
Save Rule

6. Choose a **Template** (e.g., a DocMinder® task template) to be used by the **Rule**.



The screenshot shows the 'Create New Rule' form. The 'Rule Name' field contains 'Expense Report'. The 'Template' dropdown menu is open, showing a list of templates: 'Assignment & Delegation', 'Capital Expenditure', 'Contract Obligations', 'Document Review', 'Existing Contract', 'IT_Compliance (Annual)', 'IT_Compliance (Monthly)', and 'Legal_Hold_Checklist'. A mouse cursor is pointing at 'Capital Expenditure'. Other fields include 'Status', 'From', 'Due Date Property', 'Exec Order', 'or Column', 'Days Offset', and 'Due Date Time'. There are checkboxes for 'Link', 'Copy', and 'Send Immediate Notification'. A 'Save Rule' button is at the bottom.

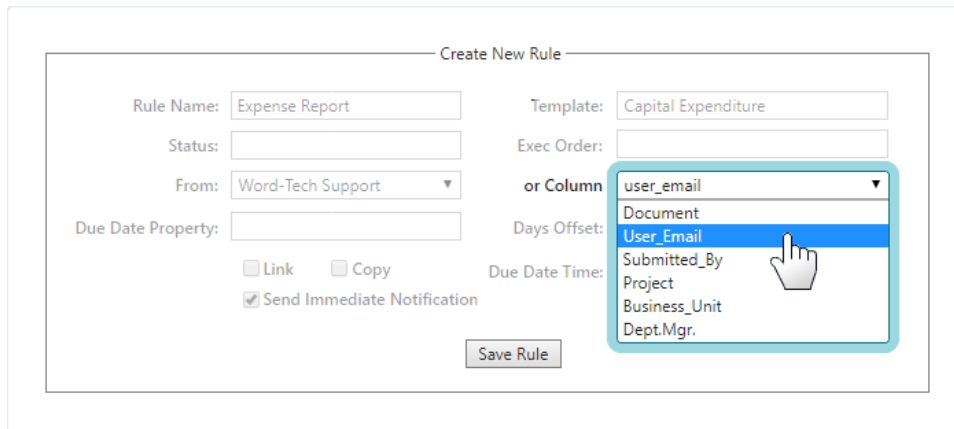
7. Select a licensed user as the **Owner** (e.g., **From**); Or



The screenshot shows the 'Create New Rule' form. The 'Rule Name' field contains 'Expense Report'. The 'Template' field contains 'Capital Expenditure'. The 'From' dropdown menu is open, showing a list of users: 'Brandonw Williams', 'Christina Thomas', 'Dan Riddick', 'Lee Anne Shearer', 'Mark Heaney', 'Ron Light', 'Teresa Younts', and 'Word-Tech Support'. A mouse cursor is pointing at 'Word-Tech Support'. Other fields include 'Status', 'Exec Order', 'or Column', 'Days Offset', and 'Due Date Time'. A 'Save Rule' button is at the bottom.

Select a database field (e.g., **or Column**) to assign the **Owner**. The database fields are from the text fields that you entered for the query from **Integrated Systems >> Advance Command Properties**.

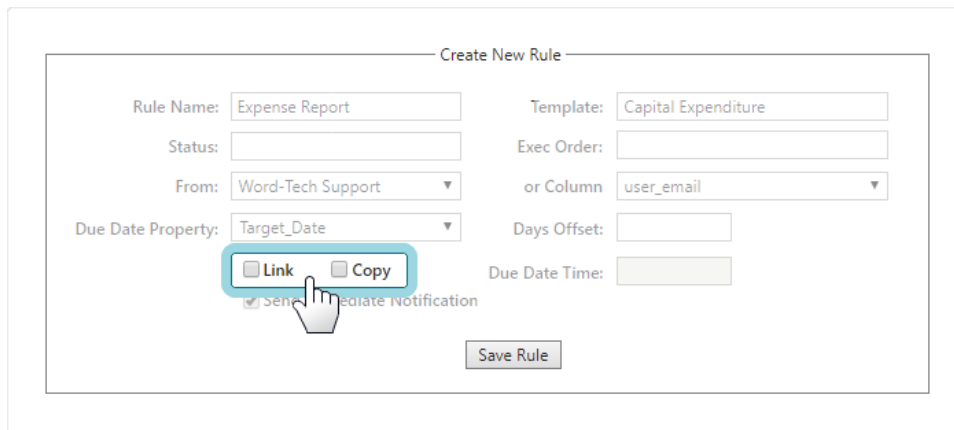
8. The **Due Date** can be the time it is created; or any **Date Field** in the query. The days can be offset (e.g., added or subtracted from the due date).



The screenshot shows the 'Create New Rule' form with the following fields and options:

- Rule Name: Expense Report
- Template: Capital Expenditure
- Status: (empty)
- Exec Order: (empty)
- From: Word-Tech Support
- or Column: user_email (dropdown menu open, showing options: Document, User_Email, Submitted_By, Project, Business_Unit, Dept.Mgr.)
- Days Offset: (empty)
- Due Date Property: (empty)
- Due Date Time: (empty)
- Link
- Copy
- Send Immediate Notification
- Save Rule button

9. **Link** and **Copy** are used if the Rule is running from a Document Management System.



The screenshot shows the 'Create New Rule' form with the following fields and options:

- Rule Name: Expense Report
- Template: Capital Expenditure
- Status: (empty)
- Exec Order: (empty)
- From: Word-Tech Support
- or Column: user_email
- Days Offset: (empty)
- Due Date Property: Target_Date
- Due Date Time: (empty)
- Link
- Copy
- Send Immediate Notification
- Save Rule button

10. The **Send Immediate Notification** will send the first notification when a task is created by the **ARC Rule**.

The screenshot shows the 'Create New Rule' form with the following fields and values:

- Rule Name: Expense Report
- Template: Capital Expenditure
- Status: (empty)
- Exec Order: (empty)
- From: Word-Tech Support
- or Column: user_email
- Due Date Property: Target_Date
- Days Offset: (empty)
- Due Date Time: (empty)
- Link:
- Copy:
- Send Immediate Notification: (highlighted with a hand cursor)
- Save Rule: (button)

11. Set a filter for the same condition that you want to update when the task is created; then click **Save New**. This flags the record to show that a task was created; otherwise, a new task is created every minute.

The screenshot shows the 'Create New Rule' form with the following fields and values:

- Save Rule: (button)
- DM Field: DocMinder (dropdown menu open, showing options: User_ID, User_Email, Document_ID, DocMinder)
- Data Type: (empty)
- Operator: Is Null (dropdown menu)
- Value: 0 (text input)
- Save New: (button, highlighted with a hand cursor)

You can set other filters such as where a specific dept. was entered, or based on a date, user, etc., allowing you to use the same **Integrated System** for different **Rules**.

12. Next, select the **Recipient**. Enter an email into the textbox or select a database field from the dropdown (e.g., To: CC: or BCC: as well as several names can be added).

Create New Rule

Email	Email Property	Send Type	Action	
	submitted_email	Cc:	Edit	Delete
	submitted_name	Bcc:	Cancel	Update
test@docminder.us		To:	Edit	Delete

Submitted_Name
Submitted_Email
Category
Department

13. For the **Subject** and **Body** of the message; you will paste in text you want to appear with bracketed fields from the database; <<subject>> <<body>>.

Create New Rule

Document Properties:

- <<System.DateTime.Now>>
- <<Reference_Number>>
- <<Submission_Date>>
- <<Doc>>
- <<User_ID>>
- <<User_Email>>
- <<Submitted_By>>
- <<Project>>
- <<BusinessUnit>>
- <<Dept_Mgr>>
- <<Project_ID>>
- <<TargetDate>>
- <<Body>>
- <<Document_ID>>
- <<DocMinder>>

Subject Template:

New Capital Expenditure Report Entered by <<submitted_name>>

Message/Body Template:

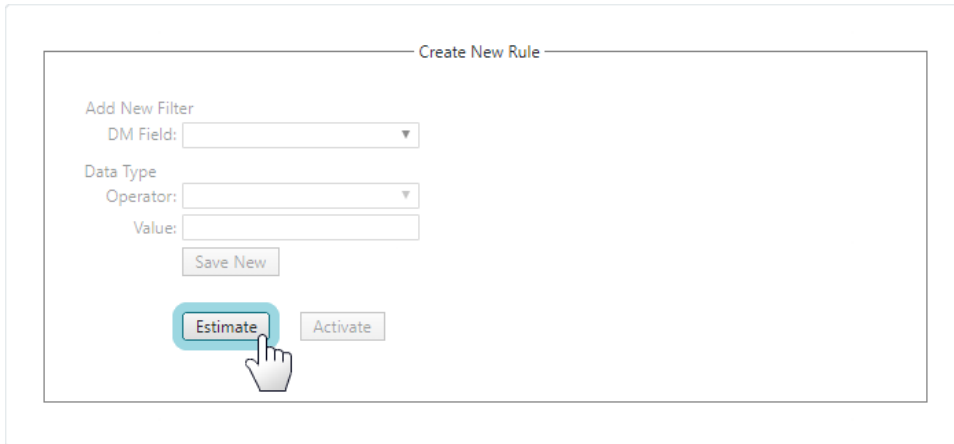
New Capital Expenditure Report has been entered by
<<submitted_name>> on <<submittedDate>>.

This request is for <<category>> in the <<department>> department
and is of <<importance>> importance.

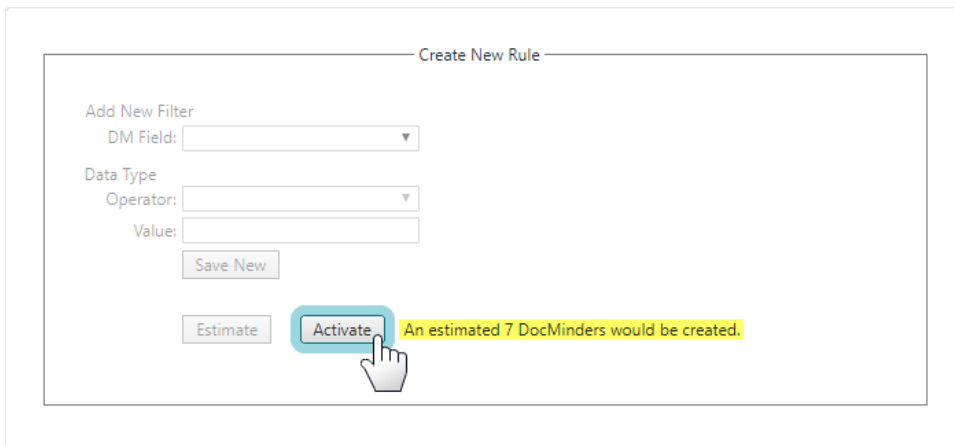
Please complete this by <<Date>>.

Notes: <<Body>>

14. After setup is complete, click on **Estimate**; which will calculate the number of tasks generated by the **Rule** so that you don't create an excessive number of tasks.



15. After accepting that the estimate is what you intended, click on **Activate** and your **Rule** will now be **Active**.



When the conditions for the **Rule** are met, a task will be created.

In the event there is an error processing the **Rule**, the **Rule** will become **InActive** to prevent further tasks from being created.