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

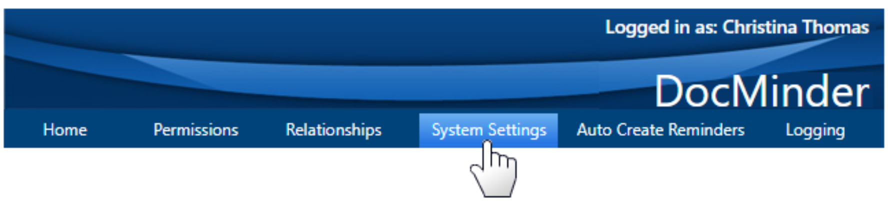
Launch the DocMinder® **Web Admin** from the WebClient application; or, through the Desktop Client application.

Web Admin >> Integrated Systems

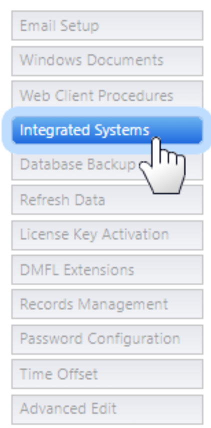
DocMinder® provides integration with a variety of systems and applications.

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

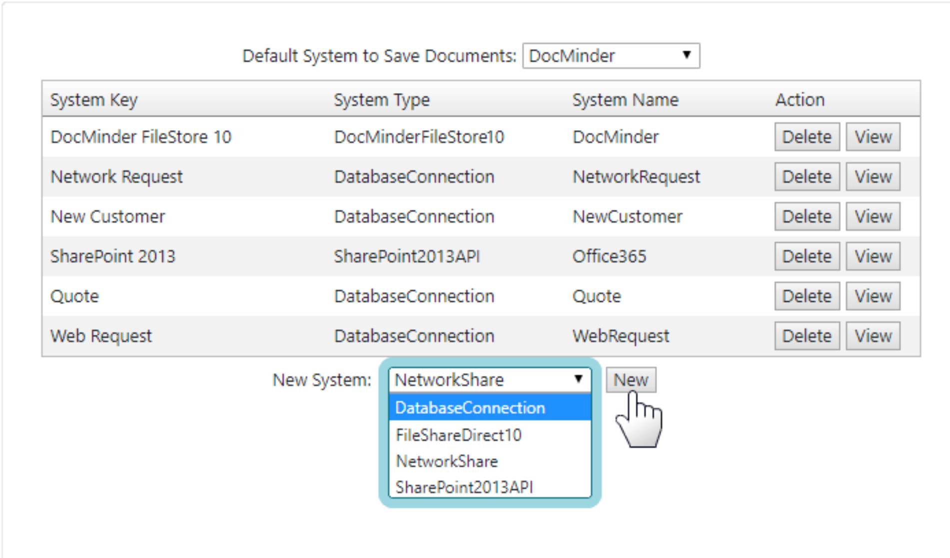
1. Click on **System Setting**s from the Top-Navigation bar;



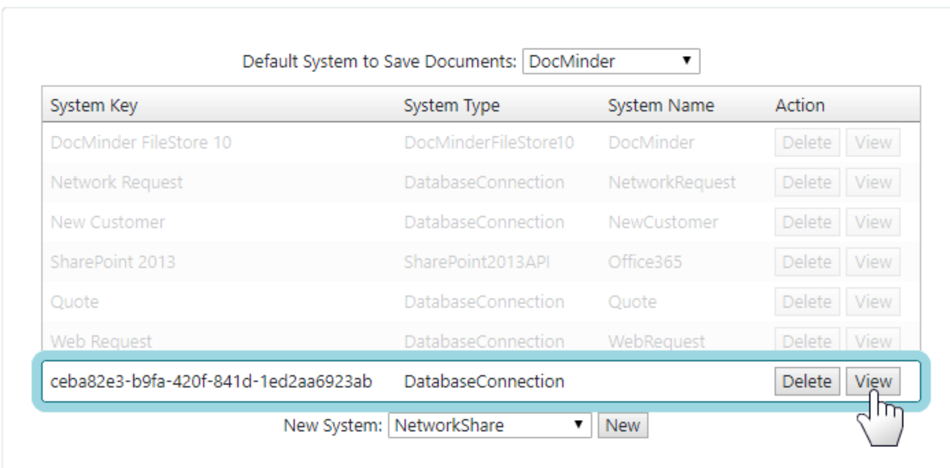
2. Then click on **Integrated System**s from the Left-Navigation menu.



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

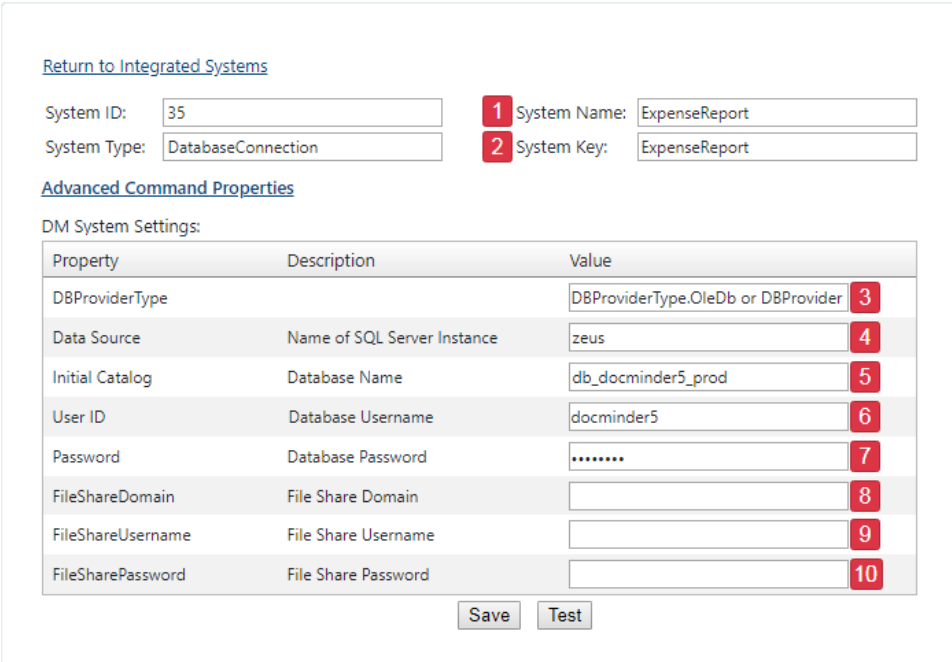


4. Click on **View** from the column labeled **Action** in the table.



Integrated System View:

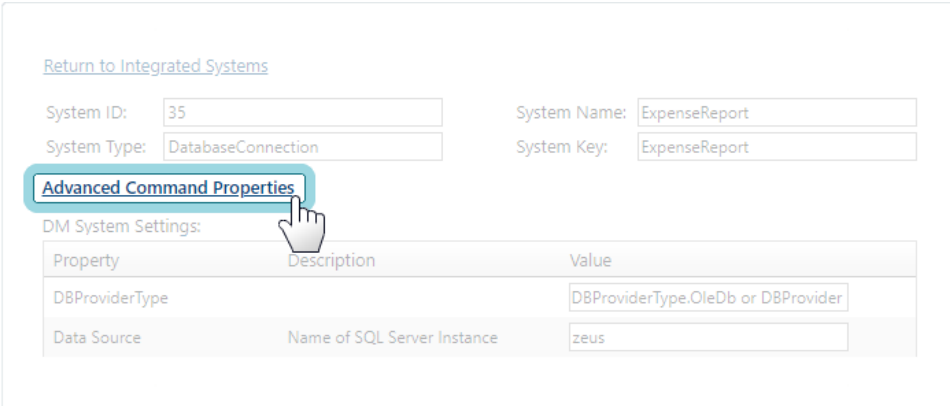
The **Integrated System View** page displays more configuration settings (e.g., database properties, values, etc.) for systems you wish to integrate with DocMinder®.



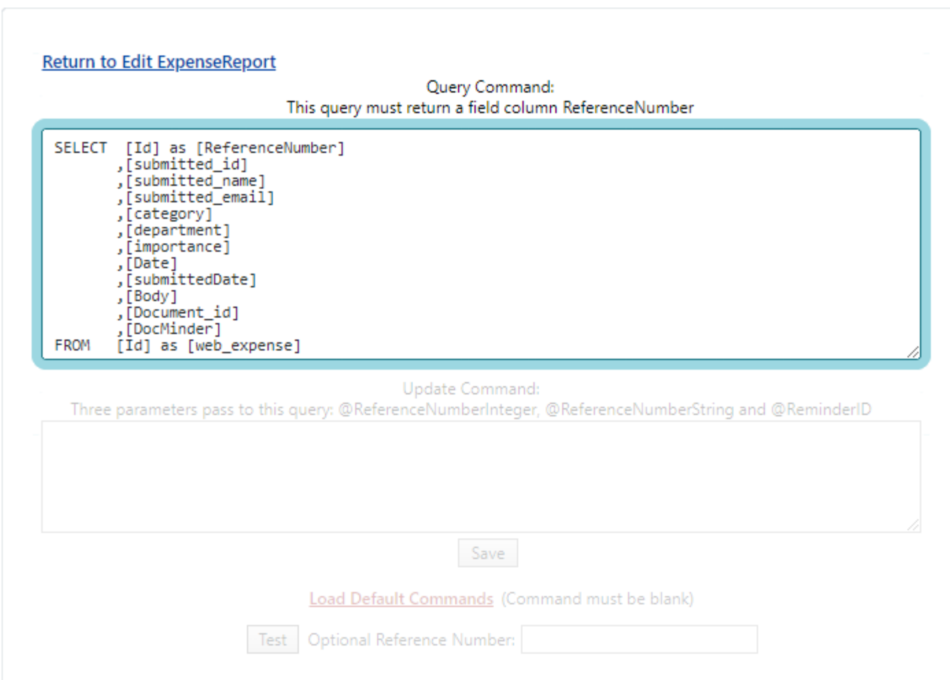
1	**Data Source**: The Database Server hosting the Database.
2	**Initial Catalog**: SQL database name for the system.
3	**User ID**: A SQL login account with at least read access to the database.
4	**Password**: SQL password for the database user account.
5	**File Share Domain**: N/A.
6	**File Share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

Advance Command Properties:

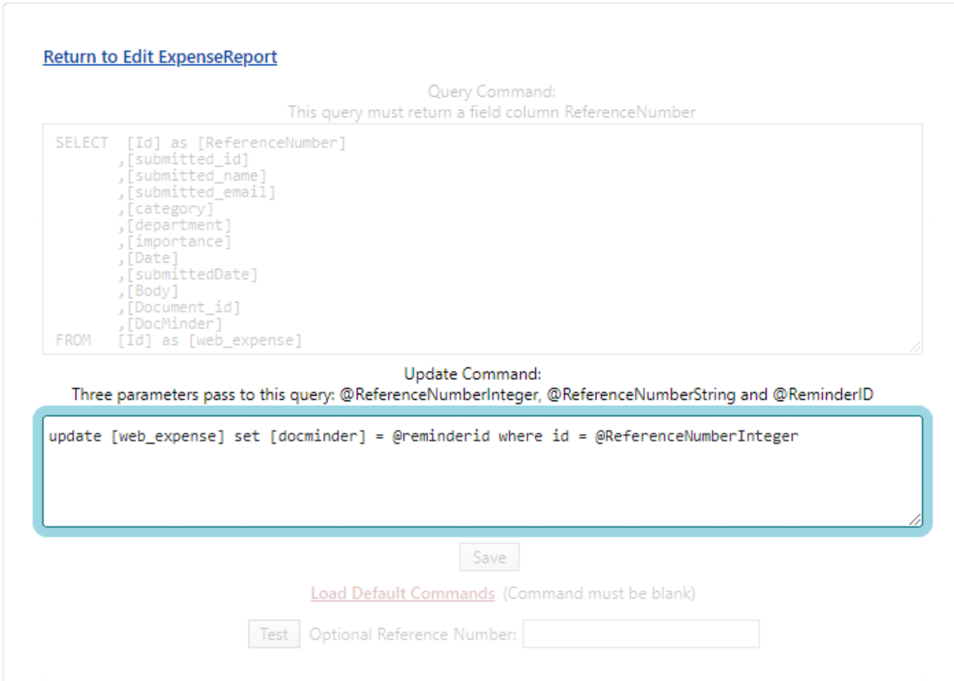
5. Click on the **Advance Command Properties** link.



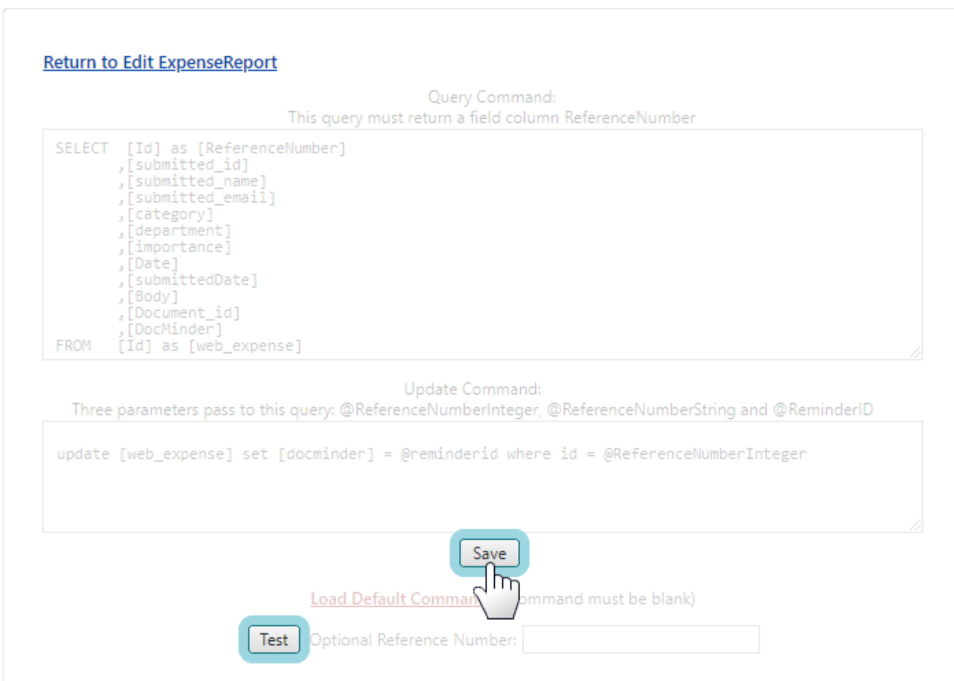
6. Enter the **SQL Query** for extracting the necessary data. This will populate the **SQL** necessary to extract information from the system.



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

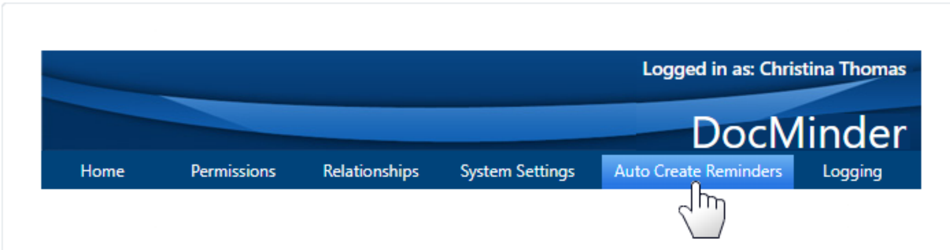


8. Click the **Save** button and then click **Test**.

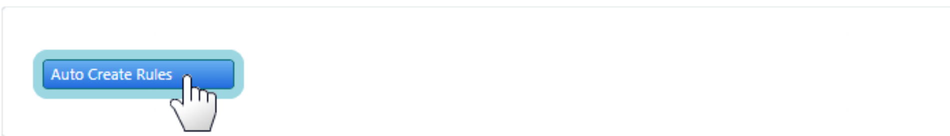


ARC Rule Setup

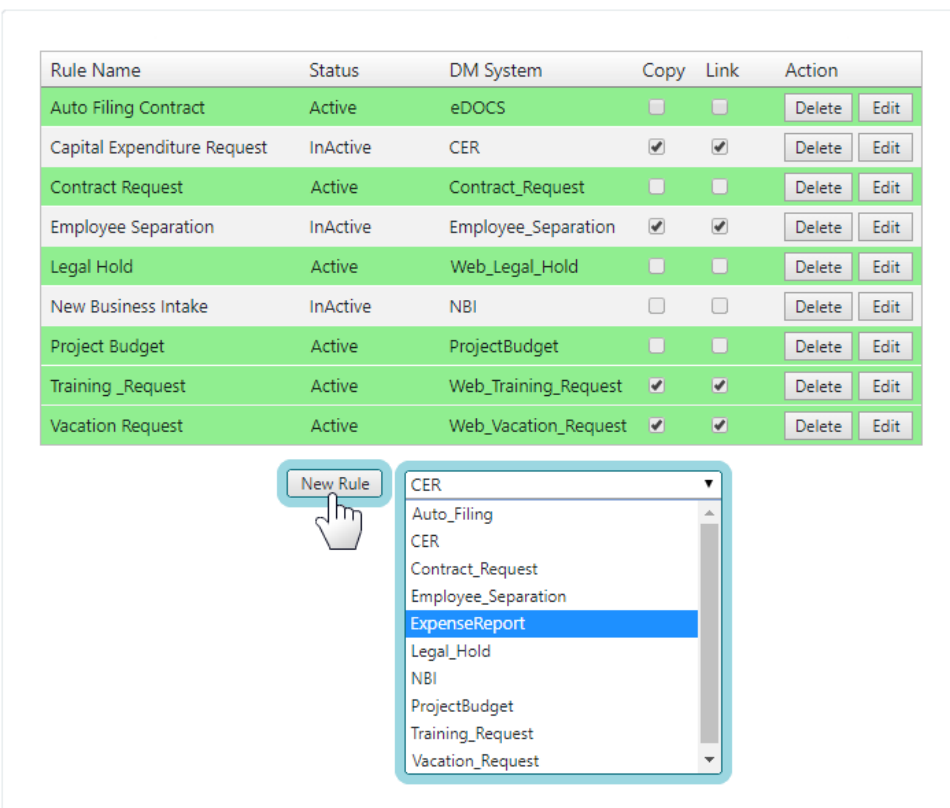
1. Click on **Auto Create Reminders** from the Top-Navigation bar.



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

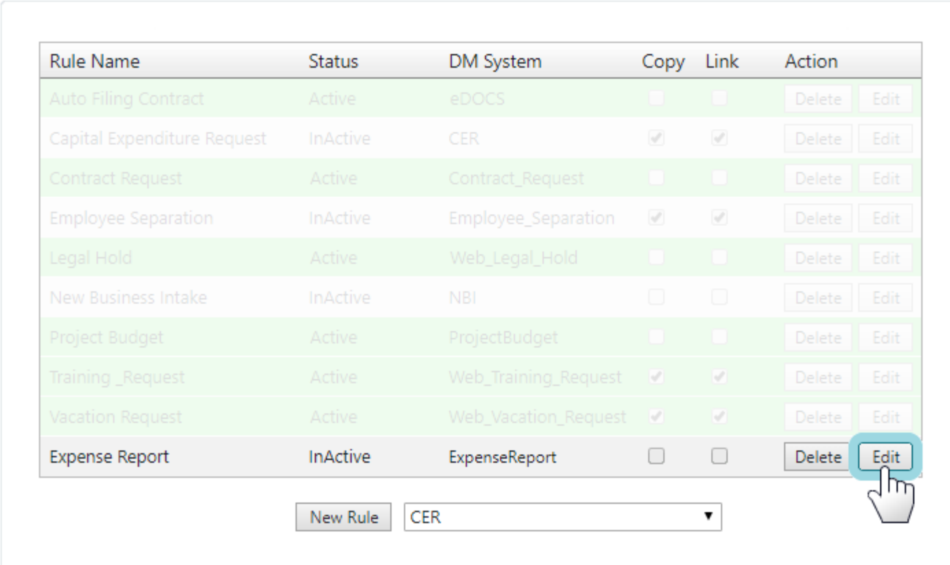


3. Select the name of the integrated system you created and click **New Rule**.

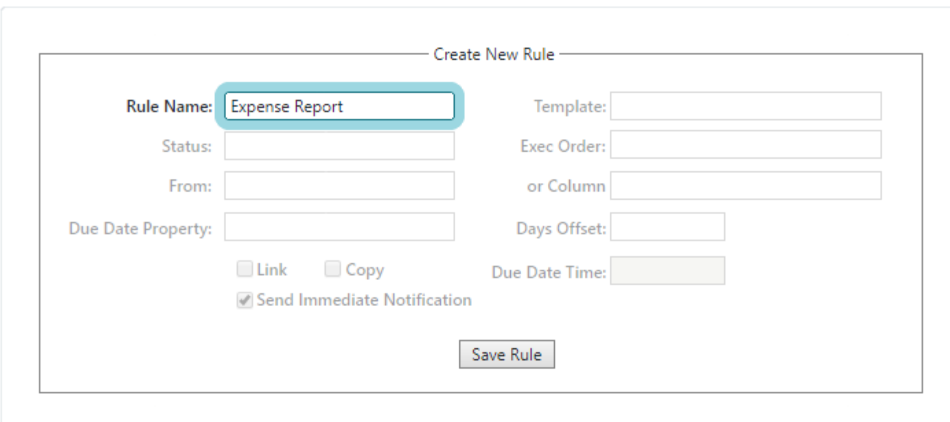


Rule Name	Status	DM System	Copy	Link	Action
Auto Filing Contract	Active	eDOCS	☐	☐	Delete Edit
Capital Expenditure Request	InActive	CER	☑	☑	Delete Edit
Contract Request	Active	Contract_Request	☐	☐	Delete Edit
Employee Separation	InActive	Employee_Separation	☑	☑	Delete Edit
Legal Hold	Active	Web_Legal_Hold	☐	☐	Delete Edit
New Business Intake	InActive	NBI	☐	☐	Delete Edit
Project Budget	Active	ProjectBudget	☐	☐	Delete Edit
Training _Request	Active	Web_Training_Request	☑	☑	Delete Edit
Vacation Request	Active	Web_Vacation_Request	☑	☑	Delete Edit

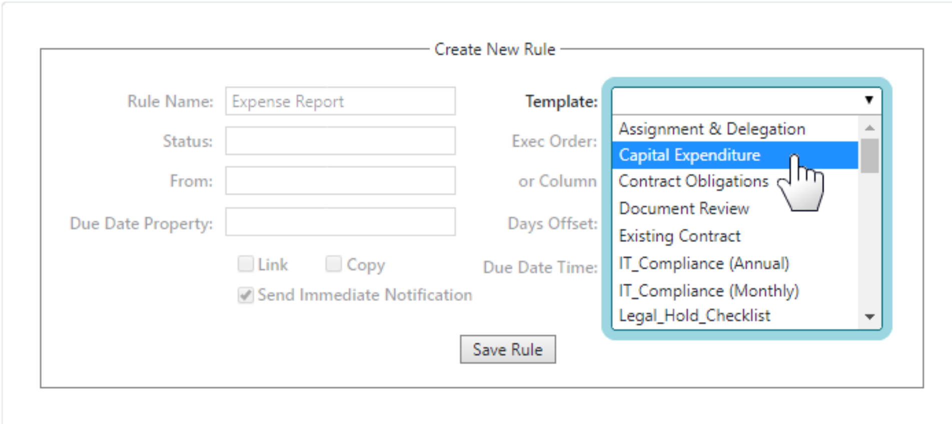
4. Click **Edit**.



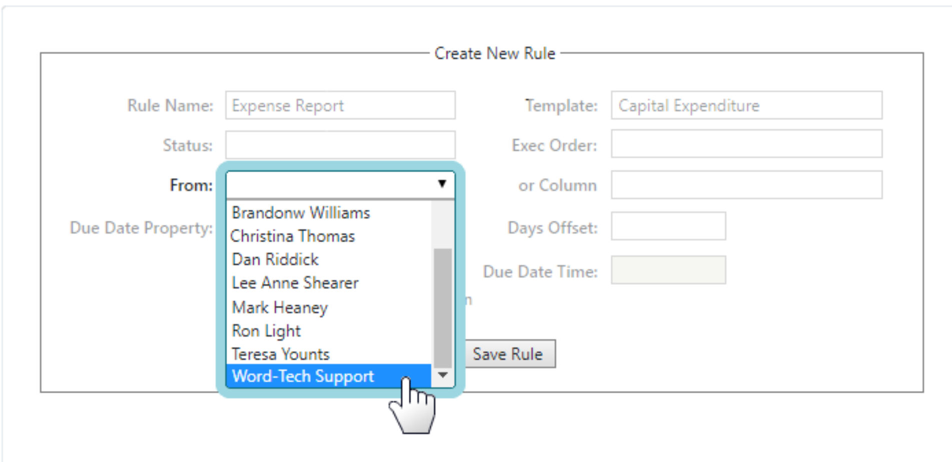
5. Enter a descriptive **Rule Name** (e.g., Project Expense Report).



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

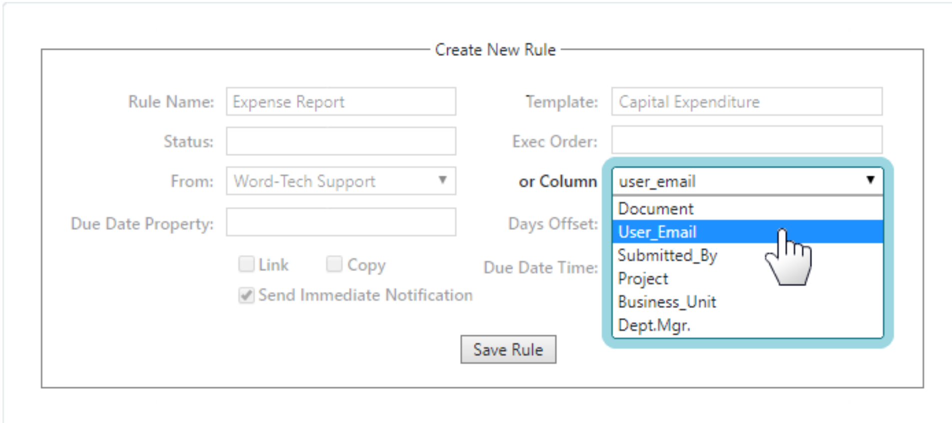


7. Select a licensed user as the **Owner** (e.g., **From**); Or

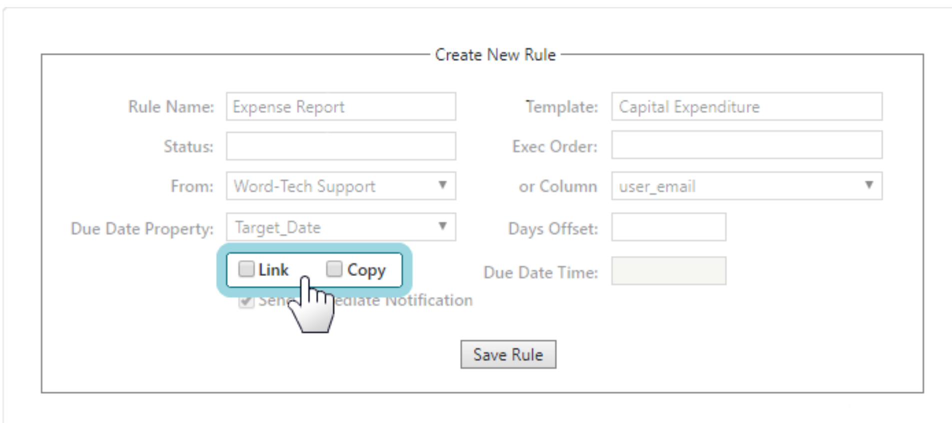


Select a database field (e.g., **or Column**) to assign the **Owner**. The database fields are from the text fields that you entered for the query from **Integrated Systems >> Advance Command Properties**.

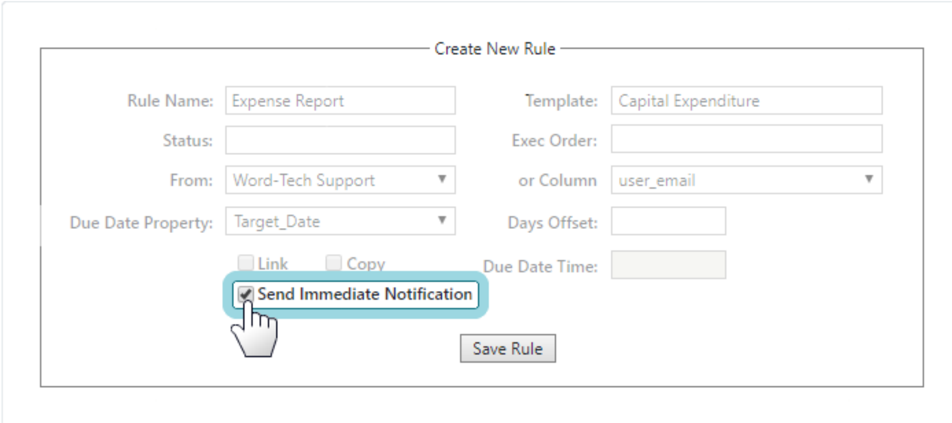
8. The **Due Date** can be the time it is created; or any **Date Field** in the query. The days can be offset (e.g., added or subtracted from the due date).



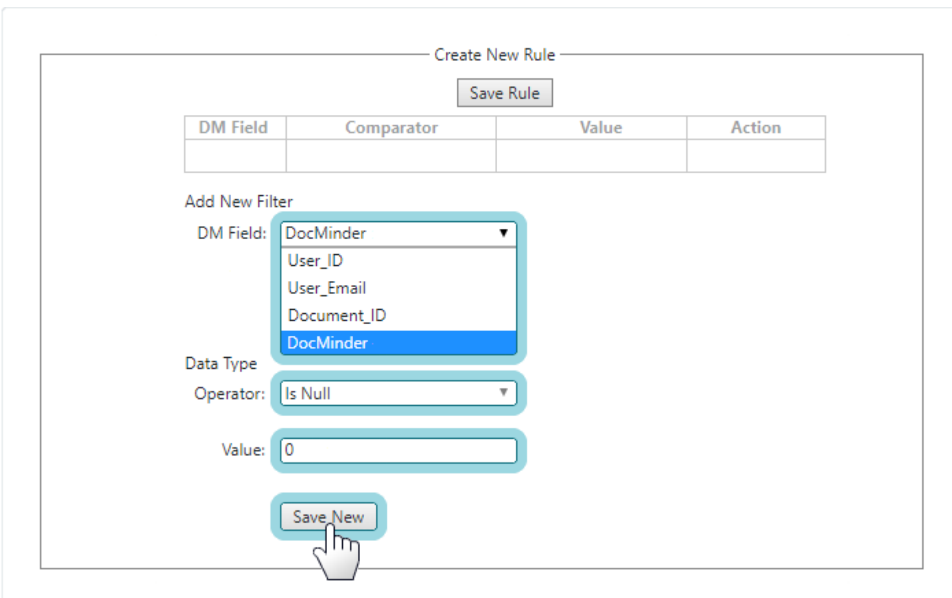
9. **Link** and **Copy** are used if the Rule is running from a Document Management System.



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

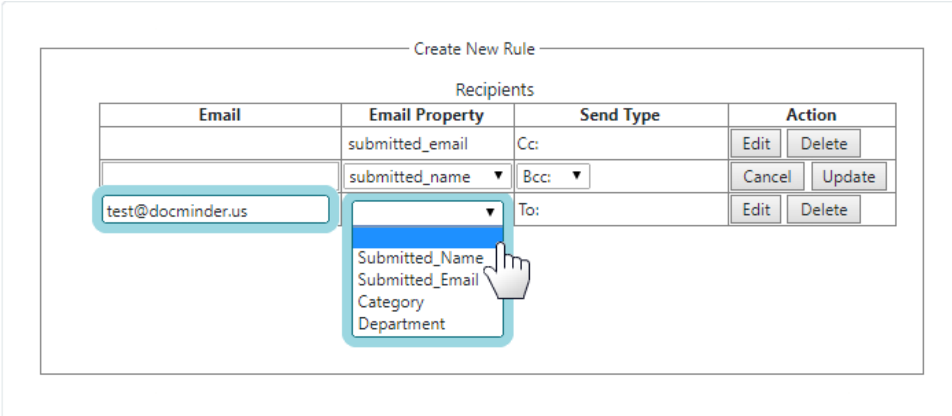


11. Set a filter for the same condition that you want to update when the task is created; then click **Save New**. This flags the record to show that a task was created; otherwise, a new task is created every minute.

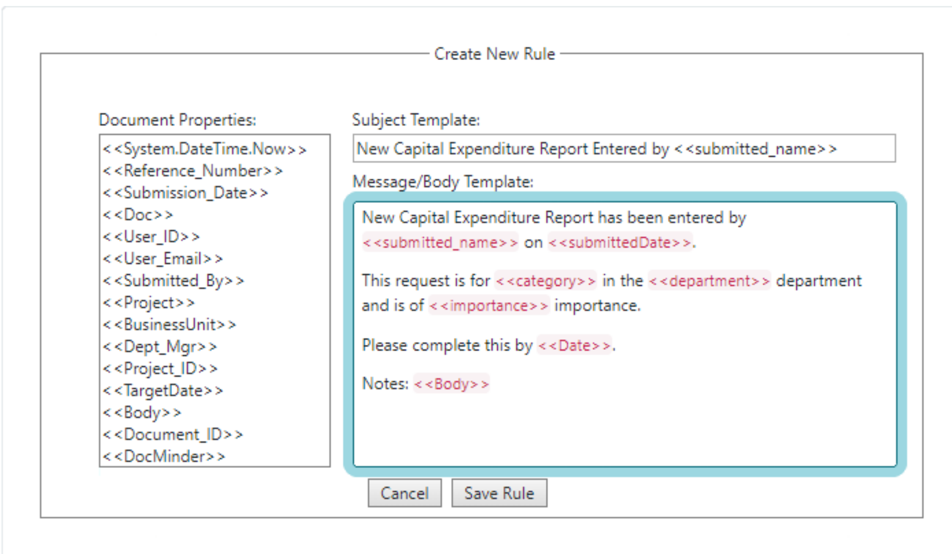


You can set other filters such as where a specific dept. was entered, or based on a date, user, etc., allowing you to use the same **Integrated System** for different **Rules**.

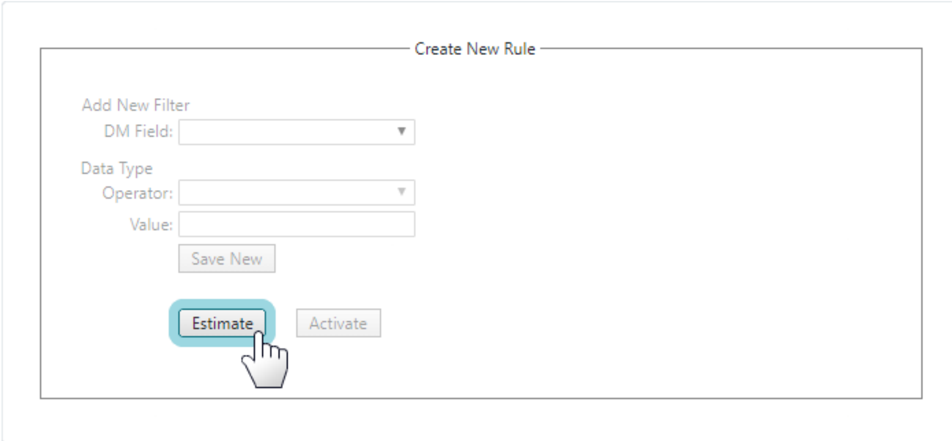
12. Next, select the **Recipient**. Enter an email into the textbox or select a database field from the dropdown (e.g., To: CC: or BCC: as well as several names can be added).



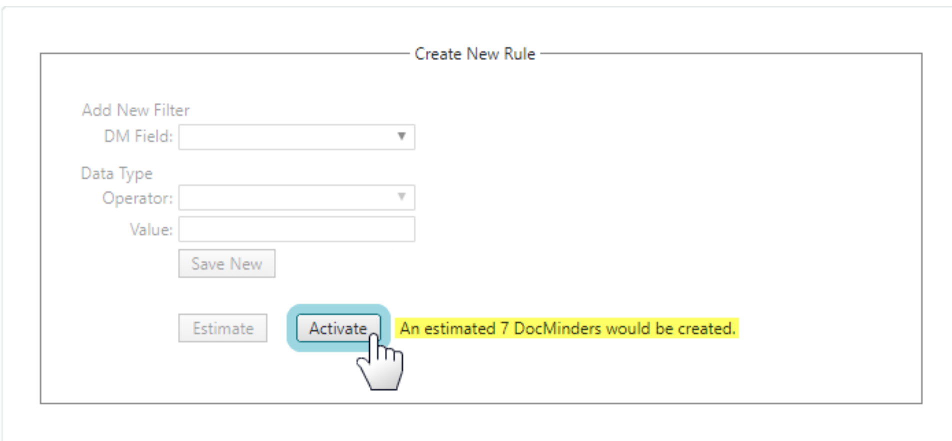
13. For the **Subject** and **Body** of the message; you will paste in text you want to appear with bracketed fields from the database; <<subject>> <<body>>.



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 **InActiv**e to prevent further tasks from being created.