



Double Check
Quick Start Guide
Platform Services Version

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J&H, Inc. 2017

J&H, Inc.
203 Haggerty Lane
Bozeman, MT 59715
406-586-3103
bstrong@jhoe.com

Double Check
Program updated by Brandon Strong
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Double Check Quick Start Guide

Preface

This manual describes basic information to use the Double Check module.

What is Double Check?

This suite of software products enhances the functionality of the DocuWare Integrated Document Management system. Double Check detects duplicate documents in a DocuWare File Cabinet when documents are stored. Document index field values from documents in the File Cabinet are compared against the values of the document being stored. If a match is found then a duplicate is detected and the document cannot be stored. Double Check runs as a RESTful web service and is configured through a webpage.

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.

NOTE: This program consumes a DocuWare license. Log in with a user that is not used by any other process to avoid connection errors.

Installing Double Check

Double Check runs as a web application in IIS and must be deployed on a server that has access to the DocuWare web client. Deploy the Double Check web app with the following steps:

1. Download Double Check from the StapleWare website at www.stapleware.com.
2. Install .NET 7.2 if it is not already on the server. A restart may be required.
3. Unblock and unzip the folder and copy the contents to C:\inetpub\wwwroot\DoubleCheck
Note: If you're updating this software delete the files in C:\inetpub\wwwroot\DoubleCheck first.
4. Run IIS, navigate to the DoubleCheck folder, right click, and click 'Convert to Application'
5. Navigate to the DoubleCheck website in a browser and log in using DocuWare login credentials
6. Click the 'Admin' link on the top right menu
7. Type in a full path to the license file and click 'Save'. License file must be on the same server



Getting Started with Double Check

Double Check will detect duplicate entries in a DocuWare file cabinet during document storage. In the following screen shot Double Check is checking the file cabinet for any entry with COMPANY = 'JH Inc' and INVOICE# = '123456'. A duplicate was detected and an error message was displayed accordingly. The document cannot be stored until the COMPANY and INVOICE# are unique.

The screenshot shows the DocuWare interface with a validation error. The error message is: "Validation failed: Invoice AND company must be unique". The form fields are as follows:

Field	Value
DocName	201566
Company	JH Inc
Status	
DocType	
Invoice #	123456
SO #	
Cost	



Starting Double Check

Below is an example of the parameters of the Double Check program.

Navigate to the Double Check website in a web browser. Enter a valid DocuWare server URL, organization, and DocuWare login credentials, then click 'Connect'.

The screenshot shows a web browser window with the address bar containing `https://idmdw2016/doublecheck`. The page title is "Double Check". The main heading is "StapleWare Double Check" with the tagline "Duplicate checking made easy". Below the heading is a form with the following fields:

Authentication	<input type="text" value="DocuWare Authentication"/>
DocuWare Server URL	<input type="text" value="http://PresentationVM/DocuWare/Platform"/> ✓
Organization	<input type="text" value="Peters Engineering"/> ✓
Username	<input type="text" value="admin"/> ✓
Password	<input type="password" value="....."/>

Below the form is a blue "Login" button.



Connecting to DocuWare Cloud

Double Check 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.

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<https://idmdw2016/doublecheck>

Double Check

StapleWare Double Check

Duplicate checking made easy

Authentication	<input type="text" value="DocuWare Authentication"/>
DocuWare Server URL	<input type="text" value="http://PresentationVM/DocuWare/Platform"/>
Organization	<input type="text" value="Peters Engineering"/>
Username	<input type="text" value="admin"/>
Password	<input type="password" value="....."/>

Login



Double Check Job Configuration

Click 'Add New Job' to add a new validation job then click on 'New Job' to configure it.

Configure the job in the using the configuration controls. The job can be renamed using the top textbox.

- **File Cabinet** – Choose a file cabinet to use for selecting validation fields
- **Operator** – Choose if validation fields are combined with 'AND' or 'OR'
- **Error text** – Type the error message to display when a duplicate is found
- **Fields to validate** – Pick which fields to validate

Click the Save button to save the job.



Enabling Validation in DocuWare

DocuWare validations are applied to the store dialog settings. A single Double Check validation job may be used in multiple DocuWare store dialogs.

- 1) Log into the DocuWare web client, click the username, and select 'Configurations'
- 2) Click 'Web Services' at the bottom of the page then click 'Create Web Service Connection'
- 3) Copy the URL from the 'DocuWare validation URL' box in the Double Check job configuration
- 4) Paste the URL to the 'URL' box, enter the same username and password used to log into DoubleCheck, click 'Save', and click 'Test Connection'

- 5) Navigate to the store dialog in the DocuWare web client configuration
 - 6) Click 'More Options' on the bottom left, select the web validation, and click 'OK'
- Configure a Store Dialog**

- 7) Store a duplicate invoice from the document tray to test the validation