



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.

Installation

Double Check must run on a server that has access to the DocuWare web client. Download Double Check from the StapleWare website at www.stapleware.com. Unzip the folder to C:\inetpub\wwwroot and deploy the application in IIS with SSL/TLS enabled.

Note: If you're updating this software please replace the files in C:\inetpub\wwwroot and reset IIS.



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. At the top, there is a navigation bar with 'DocuWare' on the left and 'J&H Support Team' and 'J & H Office Equipment, Inc.' on the right. Below the navigation bar, there are tabs for 'Document trays', 'Searches', 'Tasks', and 'Documents - Folder'. The main area is titled 'Store to "StapleWare"'. A red error message box is displayed, stating 'Validation failed: Invoice AND company must be unique'. Below the error message, there is a form with the following fields:

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 this 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="....."/>



Double Check Job Configuration

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

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<https://idmdw2016/DoubleCheck/Home>

Double Check

J & H Office Equipment, Inc. [Log Out](#)

Add New Job Click 'Add new job' to add a new job or select a job to edit it

New Job

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

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<https://idmdw2016/DoubleCheck/Home>

Double Check

J & H Office Equipment, Inc. [Log Out](#)

Add New Job

Company and Invoice

Company and Invoice

File Cabinet: StapleWare

Operator: And

Error text: Company and Invoice # must be unique.

Fields to validate: Company, Invoice #

[Save](#) [Delete](#)

DocuWare validation URL:
<https://idmdw2016/DoubleCheck/Validation?clientid=1&jobid=1>

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) Use the DocuWare web client to navigate to the 'More Options' section of the store dialog
- 2) Copy the URL from the 'DocuWare validation URL' box in the Double Check job configuration
- 3) Paste the URL to the 'Send all index values to this webservice' box in the DocuWare search dialog configuration
- 4) Click 'Test Accessibility', then click 'OK' then 'Save' in the DocuWare configuration window

Configure a Store Dialog

SO #	<i>Change label</i>	Text	☰	<input type="checkbox"/>	👁
Cost	<i>Change label</i>	Decimal	☰	<input type="checkbox"/>	👁
Completed Date	<i>Change label</i>	DateTime		<input type="checkbox"/>	👁
Notes	<i>Change label</i>	Memo		<input type="checkbox"/>	👁
Contact	<i>Change label</i>	Text	☰	<input type="checkbox"/>	👁
Date	<i>Change label</i>	Date	☰	<input type="checkbox"/>	👁
First Name	<i>Change label</i>	Text	☰	<input type="checkbox"/>	👁
Last Name	<i>Change label</i>	Text	☰	<input type="checkbox"/>	👁

Intelligent Indexing Use Intelligent Indexing to automatically fill index fields for this dialog
[Configure fields to fill](#)

^ Less options

Validation Store documents only after validation. View our [sample applications](#) ⓘ

Send all index values to this webservice:

Timeout if the service does not respond after seconds

ID ⓘ