



Process Server
Quick Start Guide
Platform Services Version

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J&H, Inc. 2017

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Process Server
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Quick Start Guide updated on 9/13/2018



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Process Server Quick Start Guide

Preface

This manual describes basic information to use the Process Server module.

What is Process Server?

This suite of software products enhances the functionality of the DocuWare Integrated Document Management system. Process Server is a service that automatically exports documents from a DocuWare File Cabinet to a folder, FTP location, or another DocuWare File Cabinet.

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

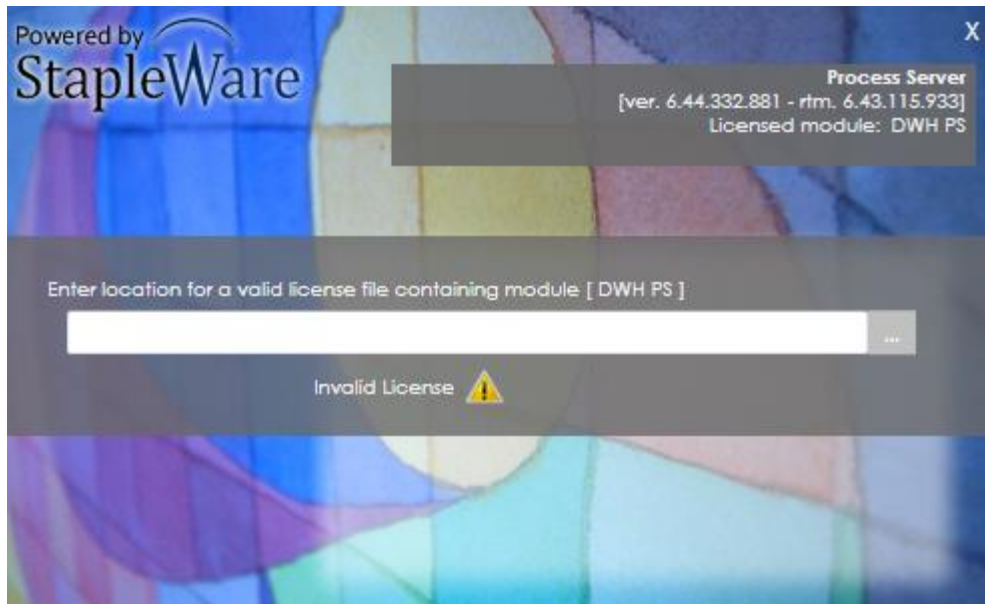
Download Process Server from the StapleWare website at www.stapleware.com. Open the **Process Server.zip** or Process Server.zip setup utility. Double-click the **Install Process Server.exe** and run the program from its current location. The install wizard will lead you through the setup process.

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.



Installation - Licensing

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

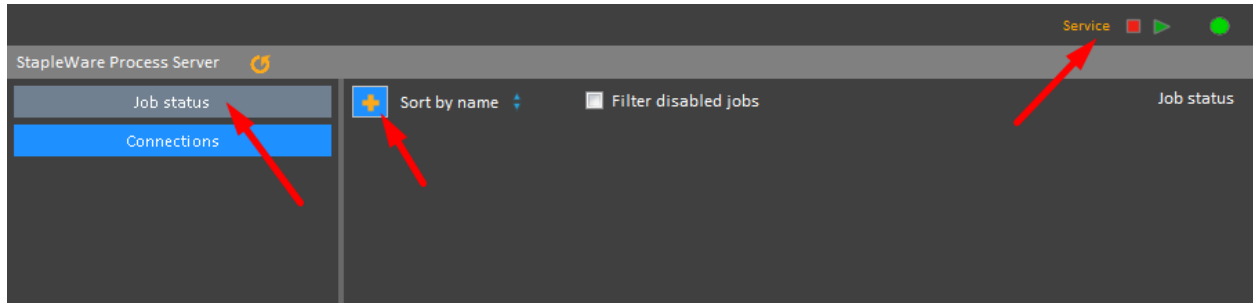


Click the browse button to select the correct license file from Windows Explorer.



Starting Process Server

The Process Server user interface needs to be ran as an administrator. When opening Process Server, right click on the icon and select 'Run as administrator'. The service can be controlled with the 'Service' buttons on the top right of the screen. From the menu pane you can configure Jobs and Connections. Create configurations by selecting the menu item and click the '+' button





Connection Configuration - DocuWare

Setup

- 1) Click the 'Connections' menu item and click the '+' button
- 2) **Connection name** – type a name for the connection
- 3) **Username** –DocuWare username
- 4) **Password** –DocuWare password
- 5) **Organization** – select the DocuWare organization (or leave blank for first login)
- 6) **Uri** – DocuWare server URL

Advanced (Proxy Settings)

- 7) **Use Proxy** – Use a proxy connection
- 8) **Use default proxy** – Use the default proxy
- 9) **Use default credentials** – Use the DocuWare username and password specified above
- 10) **Proxy URI** – Proxy server URL
- 11) **Username** – Proxy username
- 12) **Password** – Proxy password
- 13) **Domain** – Proxy domain name

The screenshot shows a 'Connection Configuration' dialog box. The 'Connection' tab is selected, displaying the following fields:

- Connection name: DocuWare
- Username: admin
- Password: masked with asterisks
- Organization: (empty dropdown)
- Uri: http://172.16.204.103/DocuWare/Platform

Below the main fields are two expandable sections:

- FTP Settings** (collapsed)
- Advanced** (expanded to show Proxy settings):
 - Use proxy:
 - Use default proxy:
 - Use default credentials:
 - Proxy Uri: (empty text field)
 - Username: (empty text field)
 - Password: (empty text field)
 - Domain: (empty text field)

At the bottom of the dialog are four buttons: Cancel, Previous, Next, and Finish.

Click 'Finish' to save the configuration



Connection Configuration - FTP

Setup

- 1) **Username** – FTP Username
- 2) **Password** – FTP Password
- 3) **URI** – FTP server URL

FTP Settings

- 4) **Transfer Mode** – Protocol to use for transfer
 - a. **FTP** – Unencrypted FTP
 - b. **FTPS** – FTP with SSL encryption
 - c. **SFTP** – FTP over an SSH connection
- 5) **Destination Folder** – Relative path for FTP and FTPS. Fully qualified path for SFTP
- 6) **Max Simultaneous Upload** – Maximum number of files that can be uploaded at once.

The screenshot shows a configuration window titled "Connection Configuration - FTP". It is divided into three sections: "Connection", "FTP Settings", and "Advanced".

- Connection section:**
 - Connection name: FTP
 - Username: administrator
 - Password: [masked]
 - Organization: [dropdown]
 - Uri: ftp://127.0.0.1
- FTP Settings section:**
 - Transfer mode: FTPS (FTP with SSL encryption)
 - Destination Folder: /DWExport
 - Max Simultaneous Upload: 1
- Advanced section:** Currently collapsed.

At the bottom of the window are four buttons: "Cancel", "Previous", "Next", and "Finish".

Click 'Finish' to save the configuration



Job Configuration – Export to Folder

Setup

- 1) Click the 'Job status' menu item and click the '+' button

Connection

- 2) **Display Name** – enter a name the job
- 3) **Select a connection** – Select the DocuWare connection

Connection

Set a display name for this configuration

Display name

You need to assign a preconfigured connection to DocuWare to allow proper configuration of this task.

Select a connection

Click the 'Next' button to move to the 'Target – destination' pane

Target – destination (Main view)

NOTE: When selecting from dropdowns you must click '☑' to apply the changes

- 4) **Select a target** – Select 'Folder'
- 5) **Source file cabinet** – Select the source file cabinet
- 6) **Destination folder** – Click '...' to browse and select the destination folder
- 7) **Convert to PDF** – Check this box to convert and export documents as PDF files
- 8) **Embed DocuWare annotations** – Merge DocuWare annotations to the PDF files during export
- 9) **Encrypt with PGP** – Encrypt files with PGP using public key and output with specified extension



Target - destination

Configure target

Select a target

Target type: Folder

Source file cabinet

Destination folder

Convert to PDF Embed DocuWare annotations

Encrypt with PGP PGP file extension

Public Key

Search criteria - [Documents]

Update field

Output file name

Output index file

Click down arrow on the right side of the Search Criteria toolbar to expand the section

Target – destination (Search Criteria)

- 10) **Select a search dialog** – select the correct search dialog to use for the configuration
- 11) **AND / OR** – select the join operator for search criteria



Search criteria - [Documents]

Select a search dialog

AND OR Active dialog [Extended Search]

Doc.-Type	<input type="text" value="INVOICE"/>	▲▼
Company	<input type="text"/>	▲▼
Contact	<input type="text"/>	▲▼
Subject/Number	<input type="text"/>	▲▼
<input type="checkbox"/> Date	<input type="text"/> - <input type="text"/>	▲▼
Status	<input type="text" value="EXPORT"/>	▲▼
Customer number	<input type="text"/>	▲▼
Employee	<input type="text"/>	▲▼
<input type="checkbox"/> Pending	<input type="text"/> - <input type="text"/>	▲▼
<input type="checkbox"/> Amount	<input type="text"/> - <input type="text"/>	▲▼
Document number	<input type="text"/>	▲▼
Cost	<input type="text"/>	▲▼
URL Integration link	<input type="text"/>	▲▼

Click down arrow on the right side of the Update Field toolbar to expand the section

Target – destination (Update Field)

- 12) **None** – Does not update a index field after export
- 13) **On Success** – Update a index field after successful export
- 14) **On Failure** – Update a index field after failed export
- 15) **On Success or Failure** – Update a field on success or failure
- 16) **Select field to update** – Select the index field to update after successful or failed export
- 17) **Success value** – Enter the update value for a successful export
- 18) **Failure value** – Enter the update value for a failed export



Update field

None On Success On Failure On Success or Failure

Select field to update: Status

Success value: SUCCEEDED

Failure value: FAILED

Click down arrow on the right side of the Output File Name toolbar to expand the section

Target – destination (File Name)

- 19) **Use custom filename** – Specify a custom file naming structure for the exported documents
- 20) **Prefix** – Prefix for exported document file names
- 21) **Suffix** – Suffix for exported document file names
- 22) **Enable file overwrite protection** – Automatically adds a –[X] to the end of each exported document file name to ensure each file in output has a unique name and prevent overwrite
- 23) **Fields available** – Select field value to use in the file name and click ‘+’
- 24) **Field separator** – Select character to separate multiple field values in the file name

Output file name

Use custom filename

Prefix: INV- Suffix: -PS

Enable file overwrite protection (-[X] will be appended to filename)

Fields available: Company +

Field separator: ,

Company

Example: INV-COMPANY-PS-[1].pdf

Invalid file name characters and null values will be stripped from file name at time of export.

Click down arrow on the right side of the Output Index File toolbar to expand the section



Target – destination (Index File)

- 25) **Enabled** – Check to enable index file output for each document that is exported
- 26) **Index output mode** – Select output mode (Text or XML)
- 27) **File extension** – Enter the file extension for index file
- 28) **Include header row** – Includes a column header row for text index files
- 29) **Fields available** – Select field to include in index file and click ‘+’
- 30) **Field separator** – Select a field separator character for text index files

Output index file

Enabled

Index output mode: TextFile

File extension for index file: csv

Include header row

Fields available: Store Date +

Field separator: ,

Customer number	×	▲▼
Amount	×	▲▼
Employee	×	▲▼
Doc-Type	×	▲▼
Store Date	×	▲▼

Cancel Previous Next Finish

Click the ‘Next’ button to move to the ‘Schedule’ pane

Schedule

- 31) **Start on** – Select the date and time for the job to start
- 32) **Time zone** – Select the correct time zone



- 33) **Schedule Type** – Set job run frequency interval
- 34) **Recurring** – Configure the job to run repeatedly (checked) or only once (unchecked)
- 35) **Enabled** – Enable (checked) or disable (uncheck) the job

Schedule

Configure the schedule for task

Start on: Fri Mar 23, 2018 9:57 AM

Time zone: (UTC-07:00) Mountain Time (US & Canada)

Schedule type

Minute Hourly Daily Weekly

Recurring Next scheduled run at Friday March 23, 2018 11:27 AM MDT

Enabled

Recurr every minutes

Click 'Save' to save the configuration



Job Configuration – Export to File Cabinet

Target – destination (Main view)

NOTE: When selecting from dropdowns you must click '✓' to apply the changes

- 1) **Select a target** – Select 'FileCabinet'
- 2) **Destination Connection** – Select DocuWare connection for the destination file cabinet
- 3) **Destination file cabinet** – Select the destination file cabinet
- 4) **Large files** – Required if exporting files that are greater than 4MB

Target - destination

Configure target

Select a target ✓

Target type: File cabinet

Source file cabinet ✓

Destination connection ✓

Destination file cabinet ✓

Convert to PDF Embed DocuWare annotations

Large files (recommended if expecting over 4MB files)

Search criteria - [Documents]

Field mappings

Select a store dialog ✓

DocName	Choose...	
Company	Company	✓
Status	Status	✓
DocType	Doc.-Type	✓
Invoice #	Document number	✓
SO #	Choose...	
Cost	Cost	✓
	Choose...	

Cancel Previous Next Finish

Click 'Next' then 'Save' to save the configuration



Job Configuration – Export to FTP

Target – destination (Main view)

NOTE: When selecting from dropdowns you must click '✔' to apply the changes

- 1) **Select a target** – Select 'Ftp'
- 2) **Destination Connection** – Select the FTP connection

Target - destination

Configure target

Select a target ✔

Target type: FTP

Source file cabinet ✔

Server Connection

Convert to PDF Embed DocuWare annotations

Encrypt with PGP PGP file extension

Public Key ...

Search criteria - [Documents] ⌵

Update field ⌵

Output file name ⌵

Output index file ⌵

Cancel Previous Next Finish

Click 'Next' then 'Save' to save the configuration



Job Usage

Jobs are managed from the 'Job status' panel. Click the job menu icon to open the popup menu

- 1) **Run immediately** – Executes the job once
- 2) **Stop** – Terminates the job if currently running
- 3) **Edit** – Opens the job configuration wizard for editing
- 4) **Delete** – Delete the selected job

The screenshot displays the 'StapleWare Process Server' interface. On the left, a sidebar contains 'Job status' and 'Connections'. The main area shows three job entries: 'Export to Folder', 'Export to File Cabinet', and 'Export to FTP'. Each job is at 0% and in an 'Idle' state. A red arrow points to a job menu icon in the top right corner of the job list. A context menu is open over this icon, showing options: 'Run immediately', 'Stop', 'Edit', and 'Delete'. The bottom of the interface includes product information and support contact details.

Product name: Process Server
Product version: [6.44.332.881]
RTM version: [6.43.115.933]

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