



***StapleWare Audit***  
***Quick Start Guide***  
**Platform Services Version**

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J&H, Inc. 2017

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***StapleWare Audit***  
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## ***StapleWare Audit Quick Start Guide***

### ***Preface***

This manual describes basic information to use the StapleWare Audit module.

### ***What is StapleWare Audit?***

This suite of software products enhances the functionality of the DocuWare Integrated Document Management system. StapleWare Audit creates a report of user access to DocuWare resources. File Cabinet Profiles, Dialogs, Roles, Groups, and Stamps are a few of the resources included in the report. The reports are an efficient way to accurately inform auditors of user rights and roles within the DocuWare system. StapleWare Audit runs manually and is configured once per run through a Windows desktop application.

### ***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 StapleWare Audit***

Download the StapleWare Audit from the StapleWare website at [www.stapleware.com](http://www.stapleware.com). Open the **Audit\_Installer.zip** or **Audit\_Setup.zip** setup utility. Double-click the **Audit\_Installer.msi** 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 the StapleWare Audit for the first time the following message will appear when StapleWare Audit is started.



Click the ellipses and select the correct license file from Windows Explorer.



## Getting Started with StapleWare Audit

StapleWare Audit will create a CSV report of user access in DocuWare. The CSV report will show the username on the first column and the user's access on the subsequent columns. Reports are saved on the same computer that StapleWare Audit runs on.

A	B	C	D	E	F
1.User	2.Groups	3a.Roles	3b.Assignment	4a.General Profile	4b.Assignment
bstrong	Public ND Clients - SearchStore no Edit	Default Organization role SampleFileCabinets	G:Public G:Public	Default Organization profile	G:Public
zheser	Public ND Administrative ND All Users ND Personnel ND Therapists	Default Organization role SampleFileCabinets	G:Public G:Public	Default Organization profile	G:Public
bgrace	Public ND Clients - SearchStore no Edit	Default Organization role SampleFileCabinets ND Personnel - Section 7 Users	G:Public G:Public self	Default Organization profile	G:Public
tplum	Public ND Clients - SearchStore no Edit	Default Organization role SampleFileCabinets	G:Public G:Public	Default Organization profile	G:Public



## ***Starting StapleWare Audit***

Below is an example of the parameters of the StapleWare Audit program.

When the StapleWare Audit starts you will be presented with a screen to log into DocuWare. Enter a valid DocuWare server URL, organization, and DocuWare login credentials, then click 'Connect'.

The image shows a screenshot of the 'StapleWare Audit' login interface. The title 'StapleWare Audit' is centered at the top. Below the title, there are four input fields for login information: 'Host' with the value 'https://servername', 'Organization' with the value 'Organization Name', 'Username' with the value 'admin', and 'Password' with five dots representing masked characters. A blue 'Connect' button is positioned below the password field.



## ***Connecting to DocuWare Cloud***

StapleWare Audit 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.

The image shows a screenshot of the 'StapleWare Audit' interface. It features a dark grey background with a white header bar containing the text 'StapleWare Audit'. Below the header, there are four input fields arranged vertically, each with a label to its left. The 'Host' field contains the text 'https://servername.docuware.cloud'. The 'Organization' field contains 'Organization Name'. The 'Username' field contains 'admin'. The 'Password' field contains five black dots. Below these fields is a blue button with the text 'Connect' in white.



## ***StapleWare Audit Configuration***

Type a valid export location in the 'Export Folder' box. This folder should be on the local computer.

Click 'Export' to run the export.

A screenshot of the StapleWare Audit configuration interface. The interface has a dark grey background with white text and input fields. At the top, the title "StapleWare Audit" is centered. Below the title, there are four input fields: "Host" with the value "https://saas.jhoe.com", "Organization" with "JH Systems SaaS", "Username" with "dwadmin", and "Password" with a masked password of ten dots. A blue "Connect" button is positioned below the password field. Below the "Connect" button, there is an "Export Folder" input field with the value "C:\AuditExport". A blue "Export" button is positioned below the "Export Folder" field. At the bottom of the interface, the text "Connected successfully." is displayed in white.

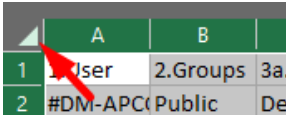




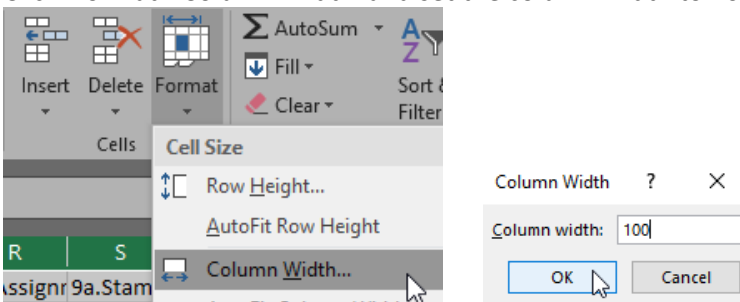
## Formatting CSV Audit Report

The CSV audit report needs to be formatted to be reader friendly.

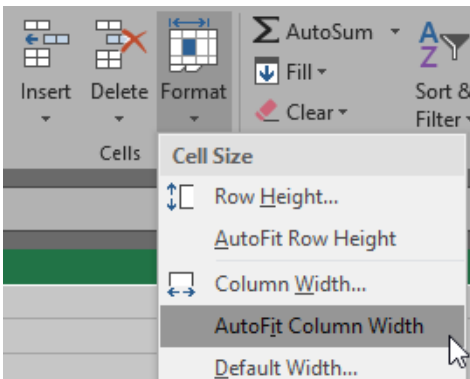
- 1) Open the CSV audit report file in Microsoft Excel
- 2) Click 'File->Save As', select a folder, and save with an 'Excel Workbook (\*.xlsx)' extension
- 3) Click the arrow on the top left to select all cells



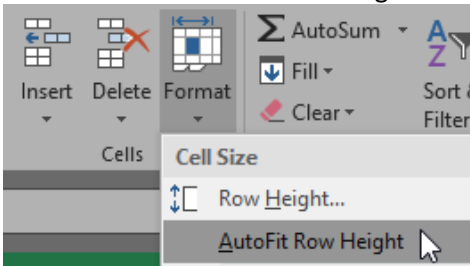
- 4) Click 'Format->Column Width' and set the column width to 100



- 5) Click 'Format->AutoFit Column Width'



- 6) Click 'Format->AutoFit Row Height'



- 7) Click cell B2, click the 'View' tab, and click 'Freeze Panes->Freeze Panes'
- 8) Save the document to save the formatting



## ***Reading the CSV Audit Report***

The CSV rows show which DocuWare resources the user has access to. Each cell hold slightly different data, and should be read differently. NOTE: The following list corresponds to the cell names in the header row

- 1) **User:** The username that has access to the resources listed in the row.
- 2) **Groups:** The groups this user is assigned to. Each line indicates a different group.
- 3) **Roles:** The roles this user is assigned to. Each line indicates a different role.
  - a. The role name
  - b. The role assignment, delimited by '|'. G: assigned by group; self: directly assigned to user
- 4) **General Profile:** The general profiles this user is assigned to. Each line indicates a different general profile
  - a. The general profile name
  - b. The general profile assignment, delimited by '|'. G: assigned by group; R: assigned by role; self: assigned directly to user
- 5) **Search Dialog:** The search dialogs this user is assigned to. Each line indicates a different search dialog
  - a. The search dialog name
  - b. The search dialog's file cabinet
  - c. The search dialog assignment, delimited by '|'. G: assigned by group; R: assigned by role; self: assigned directly to user
- 6) **Store Dialog:** The store dialogs this user is assigned to. Each line indicates a different store dialog
  - a. The store dialog name
  - b. The store dialog's file cabinet
  - c. The store dialog assignment, delimited by '|'. G: assigned by group; R: assigned by role; self: assigned directly to user
- 7) **Result List:** The result lists this user is assigned to. Each line indicates a different result list
  - a. The result list name
  - b. The result list's file cabinet
  - c. The result list assignment, delimited by '|'. G: assigned by group; R: assigned by role; self: assigned directly to user
- 8) **Cabinet Profile:** The cabinet profile this user is assigned to. Each line indicates a different cabinet profile
  - a. The cabinet profile name
  - b. The cabinet profile's file cabinet
  - c. The cabinet profile assignment, delimited by '|'. G: assigned by group; R: assigned by role; self: assigned directly to user
- 9) **Stamp:** The stamps this user is assigned to. Each line indicates a different stamp
  - a. The stamp name
  - b. The stamp assignment, delimited by '|'. G: assigned by group; R: assigned by role; F: assigned by functional profile; self: assigned directly to user