



DocuLink
Quick Start Guide
Platform Services Version

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DocuLink
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DocuLink

Quick Start Guide

Preface

This manual describes basic information to use the DocuLink module.

What is DocuLink?

This suite of software products enhances the functionality of the DocuWare Integrated Document Management system. DocuLink creates hyperlinks to documents or result lists in a DocuWare file cabinet and writes the hyperlink into the index data of the documents in the file cabinet. Links can be created dynamically from document index data in the file cabinet. Hyperlinks are accessible by third party applications through the DocuWare database allowing for integrations between third party applications and the DocuWare Web Client.

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.

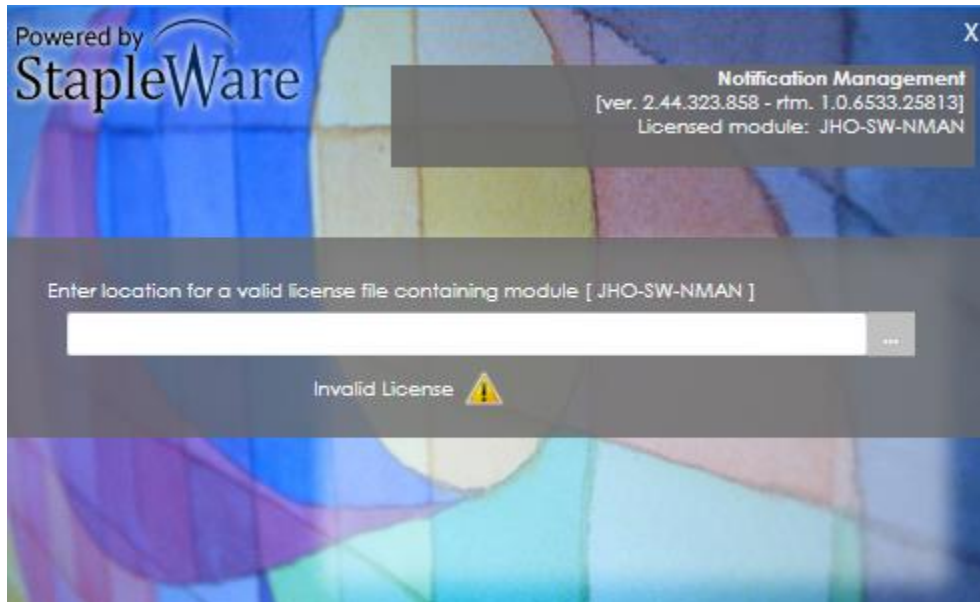
Installation

Download DocuLink from the StapleWare website at www.stapleware.com. Open the **DocuLink.zip** or DocuLink.zip setup utility. Double-click the **InstallDocuLink_v.*.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 DocuLink for the first time the following message will appear when DocuLink is started.



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

Getting Started with DocuLink

DocuLink can create hyperlinks to each document in a file cabinet and write the hyperlink for each document in its metadata. Hyperlinks can also be created for result lists. For example, DocuLink can create a hyperlink to a result list of any document that has the same company name as the document the link is created for.

1: Copy hyperlink created by DocuLink from DocuWare document index data

Type	DocName	Notes	Last Name	First Name	Company	Date	DocType	Statu
PDF	Kenyon 20180104	http://172.16.204.103/docuware/platform/webclient/	White	Janet	Kenyon	01/04/2018	Receipt	Linke
PDF	J&H 20180103	http://172.16.204.103/docuware/platform/webclient/	White	Janet	J&H	01/03/2018	Receipt	Linke
PDF	Billion 20180107	http://172.16.204.103/docuware/platform/webclient/1/Integration?lc=VXNlcj1hZG1pbXUUhdkPWfkbWlu0&p=V8fc=7be582ed-7758-493b-b3c5-18c9a8522aaf&did=6199&sed=ae5b7eb-e1e5-4aa-acdd-0054c0352996	White	Janet	Avitus	01/01/2018	Receipt	Linke
PDF	Avitus 20180101	http://172.16.204.103/docuware/platform/webclient/	White	Janet	Avitus	01/01/2018	Receipt	Linke
PDF	AMT 20180105	http://172.16.204.103/docuware/platform/webclient/	White	Janet	AMT	01/05/2018	Receipt	Linke
PDF	Kenyon 20180104	http://172.16.204.103/docuware/platform/webclient/	White	Janet	Kenyon	01/04/2018	Plans	Linke
PDF	J&H 20180103	http://172.16.204.103/docuware/platform/webclient/	White	Janet	J&H	01/03/2018	Plans	Linke
PDF	Billion 20180107	http://172.16.204.103/docuware/platform/webclient/	White	Janet	Billion	01/07/2018	Plans	Linke
PDF	Avitus 20180101	http://172.16.204.103/docuware/platform/webclient/	White	Janet	Avitus	01/01/2018	Plans	Linke
PDF	AMT 20180105	http://172.16.204.103/docuware/platform/webclient/	White	Janet	AMT	01/05/2018	Plans	Linke

2: Paste auto-created hyperlink in address bar to search for document

172.16.204.103/DocuWare/Platform/WebClient/Client/Document?did=6199&fc=7be582ed-7758-493b-b3c5-18c9a8522aaf&orgId=1&auth=865FE05A705D419EB1DCCA8EE246F5ED8D485A24165

1 / 1 >>> J&H 20180103

EQUIPMENT LOCATION FORM
J&H Office Equipment, Inc.

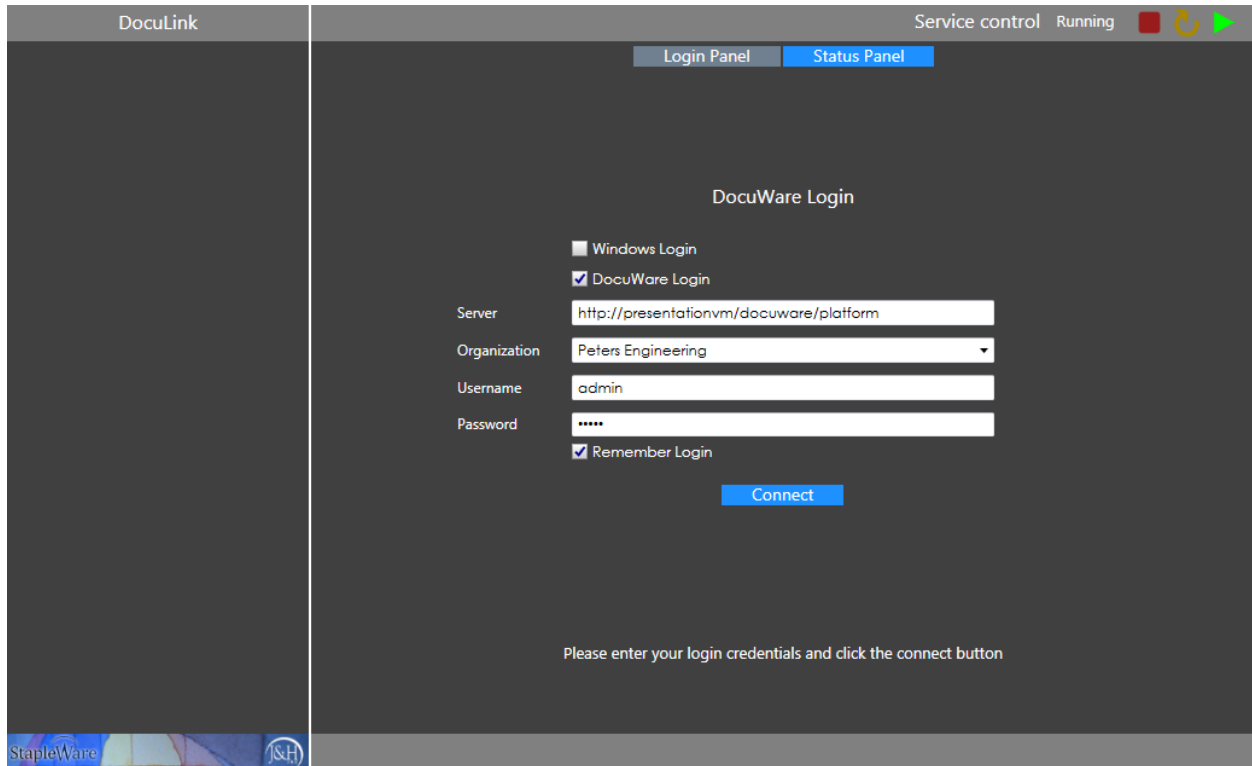
(Circle One): INSTALLATION REMOVAL

(Circle One): PURCHASE RENTAL DEMO LOANER

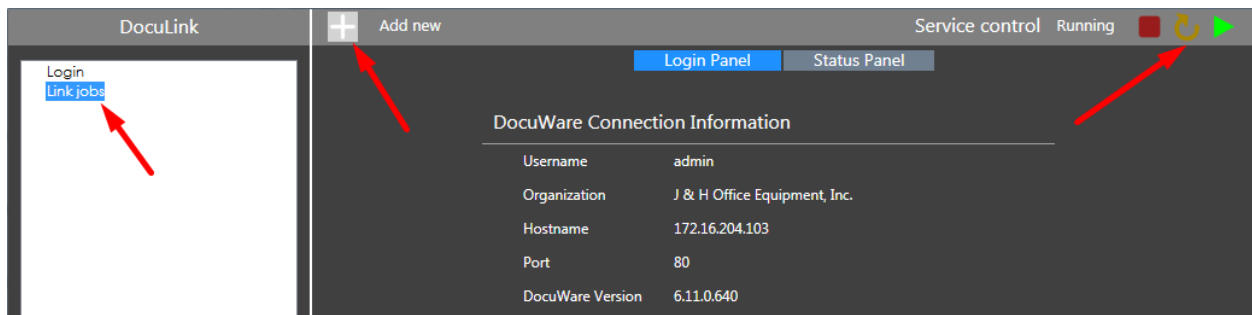
Customer Name: Billion Auto Group Customer #: 10512

Starting DocuLink

The DocuLink user interface needs to be ran as an administrator. When opening DocuLink, right click on the icon and select 'Run as administrator'. When DocuLink opens you will be presented with the DocuWare login screen. Enter the DocuWare server URL, Organization, and DocuWare login credentials, then click 'Connect'.



The DocuLink service can be controlled with the 'Service Control' buttons on the top right of the screen. From the menu tree on the left you can configure Link Jobs. To create Link Jobs either select the menu item and click the '+' button or right click the menu item and select the 'Add link job' popup.



Connecting to DocuWare Cloud

DocuLink 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.

DocuWare Login

Windows Login
 DocuWare Login

Server:

Organization:

Username:

Password:

Remember Login

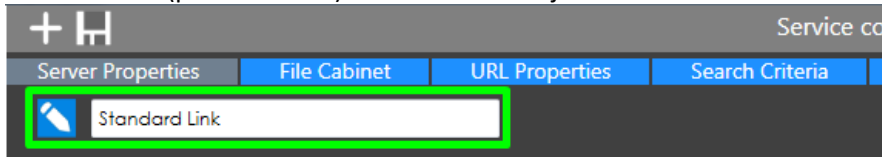
[Connect](#)

Please enter your login credentials and click the connect button

Standard Link Job Configuration

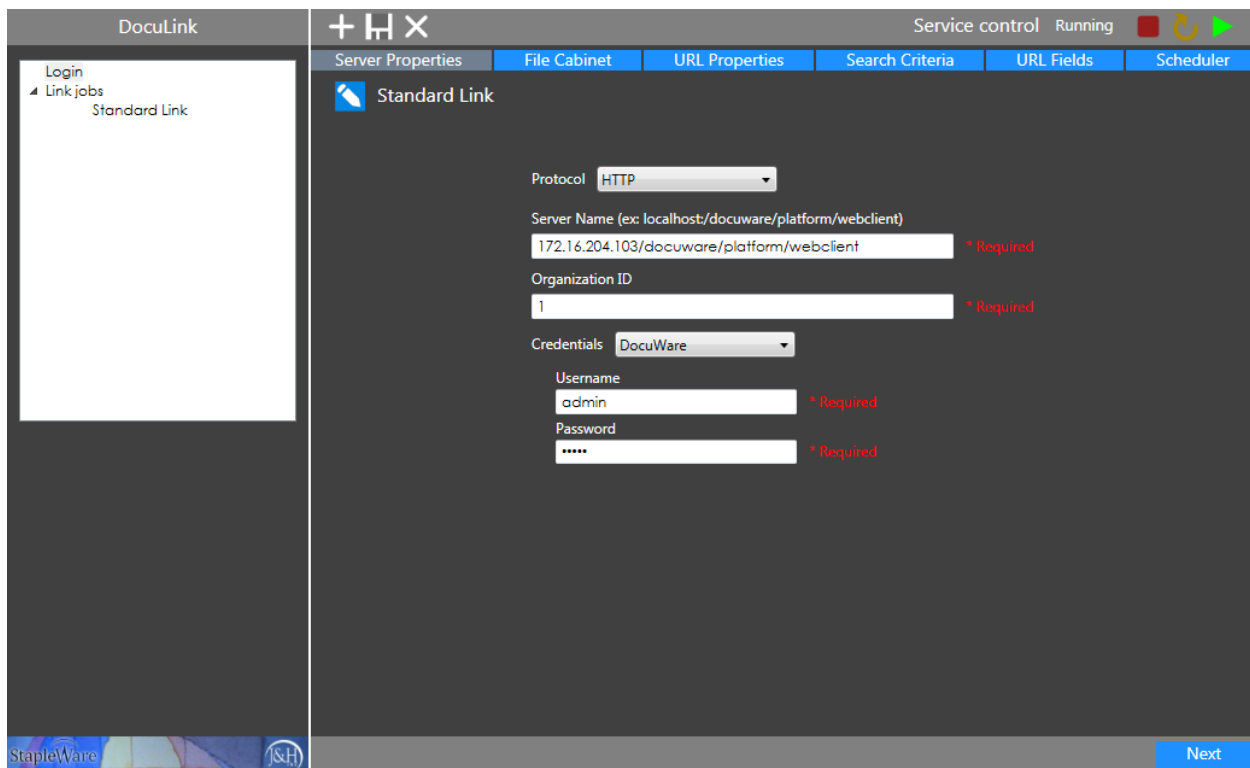
Setup

- 1) Create a new link job configuration by right clicking on the 'Link Jobs' menu item and selecting 'New link job'
- 2) Click the Edit (pencil button) to name the link job



Server Properties

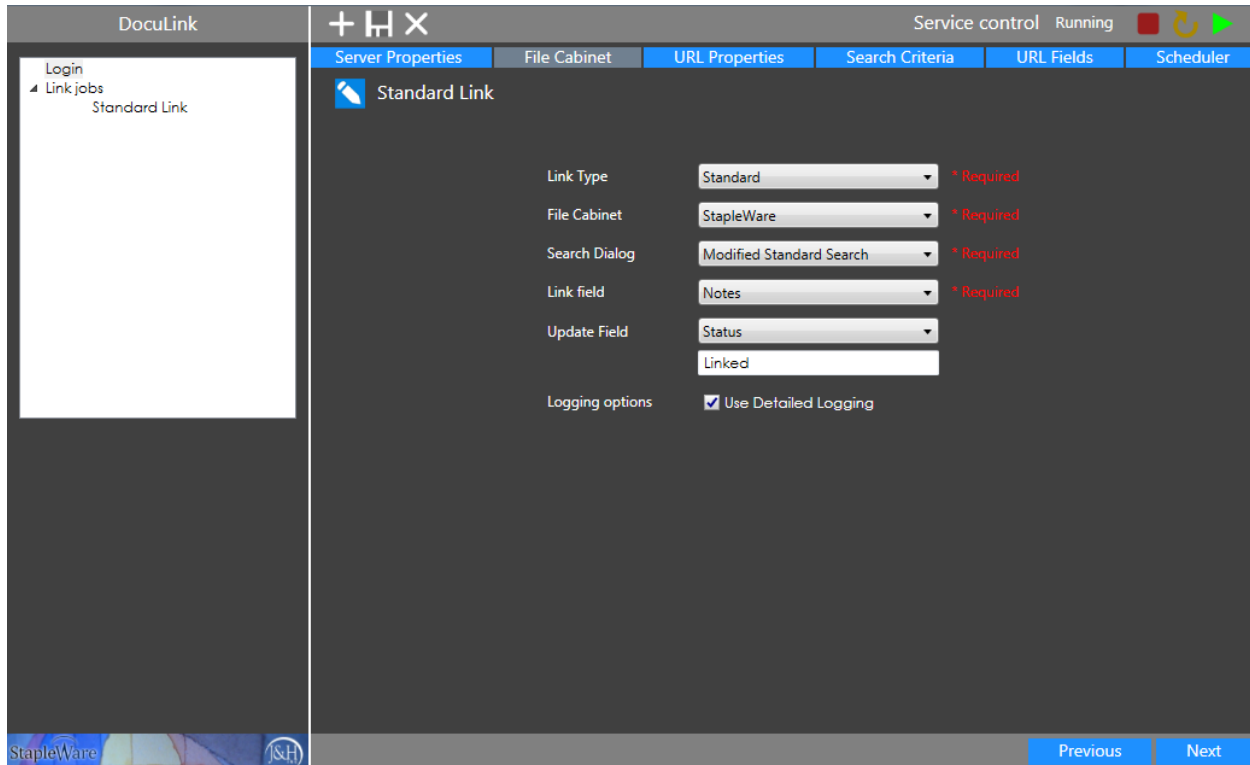
- 3) **Protocol** – Choose HTTP or HTTPS protocol for the integration link
- 4) **Server Name** – URI for the DocuWare Web Client (the DocuWare server URL)
- 5) **Organization ID** – The ID number of your organization.
- 6) **Credentials** – Select Windows Login for NTLM authentication and DocuWare Login to enter a username and password. NTLM authentication will use the Windows credentials of the user that is currently logged into the computer.



Click the 'Next' button to move to the 'File Cabinet' tab.

File Cabinet

- 7) **Link Type** – Select ‘Standard’ to create hyperlinks in this file cabinet or ‘Abstracted’ to create hyperlinks to a different file cabinet.
- 8) **File Cabinet** – Select the file cabinet to get documents from and write hyperlinks to
- 9) **Search Dialog** – Select the correct Search Dialog for the selected file cabinet
- 10) **Link file** – Define DocuWare index field to write hyperlink to
- 11) **Update field** – Document index field to update after hyperlink is written
- 12) **Logging options** – Add extra detail to the log file

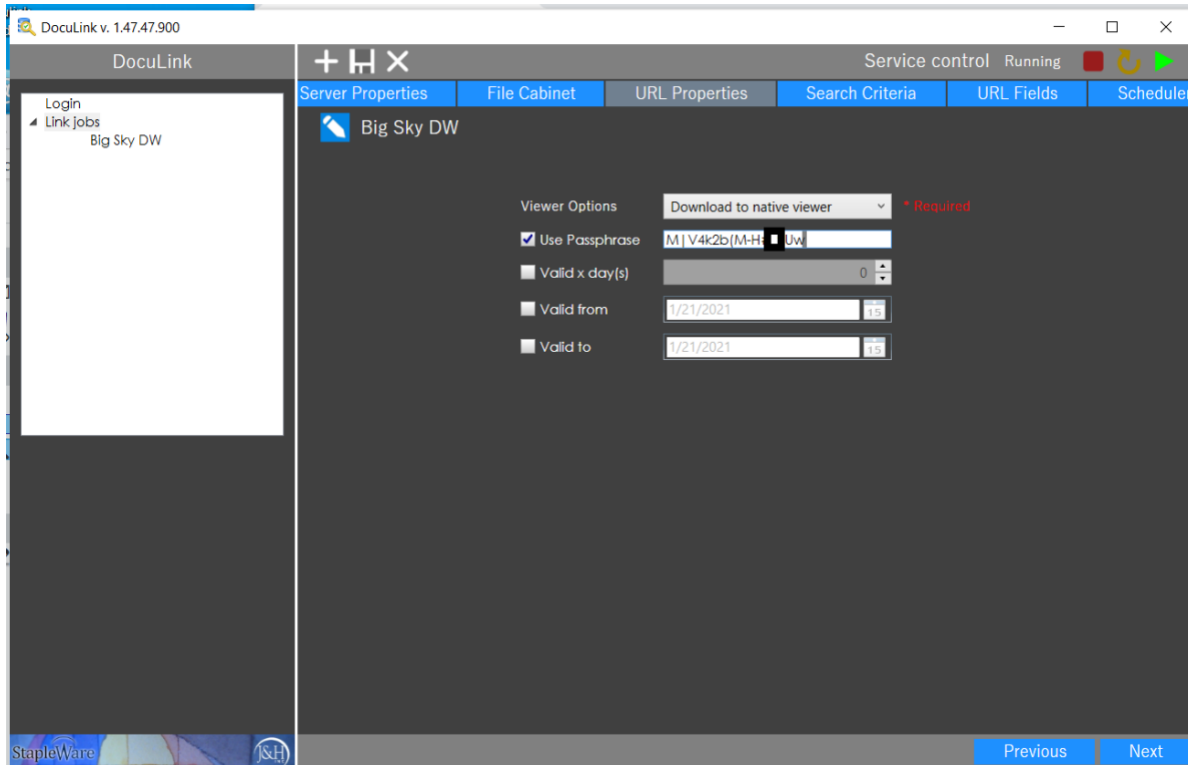


Click the ‘Next’ button to move to the ‘URL Properties’ tab.

URL Properties

- 13) **Viewer Option** – Configure how documents will be displayed in the DocuWare Web Client. ‘Viewer’ displays a single document, ‘Download to native viewer’ saves and opens the document locally, and all other options display lists of documents
- 14) **Search GUID** – Select ‘File Cabinet’ if Viewer Option is ‘Viewer’. Otherwise, select ‘Result List’
- 15) **Use Passphrase** – **NOTE! THIS IS REQUIRED AS OF DW 6.12**
Add passphrase to URL for additional security. The passphrase can be found and modified in the DocuWare Administration Tool under [ORGANIZATIONNAME]->General->Web Access->Passphrase.
- 16) **Valid x day(s)** – Number of days the hyperlink will be usable from the day it is created
- 17) **Valid from** – First day that the hyperlink will be usable

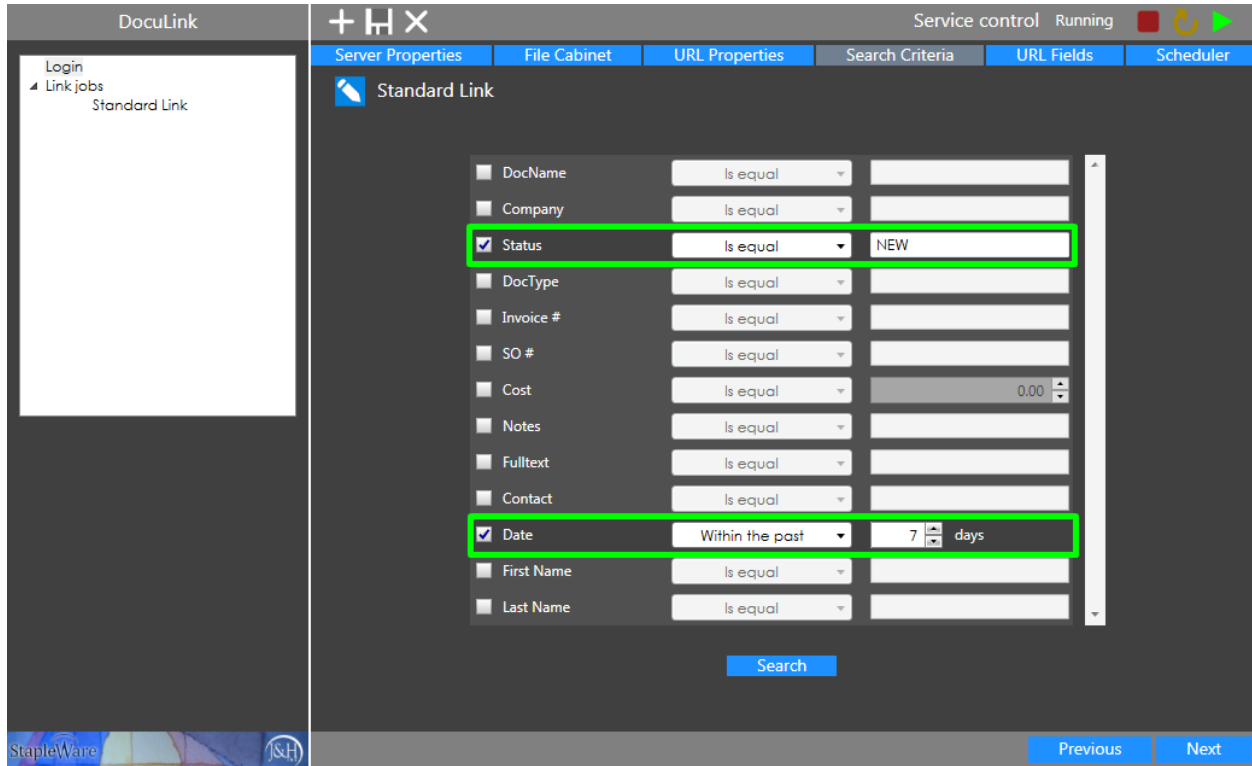
18) **Valid to** – Last day that the hyperlink will be usable



Click the 'Next' button to move to the 'Search Criteria' tab.

Search Criteria

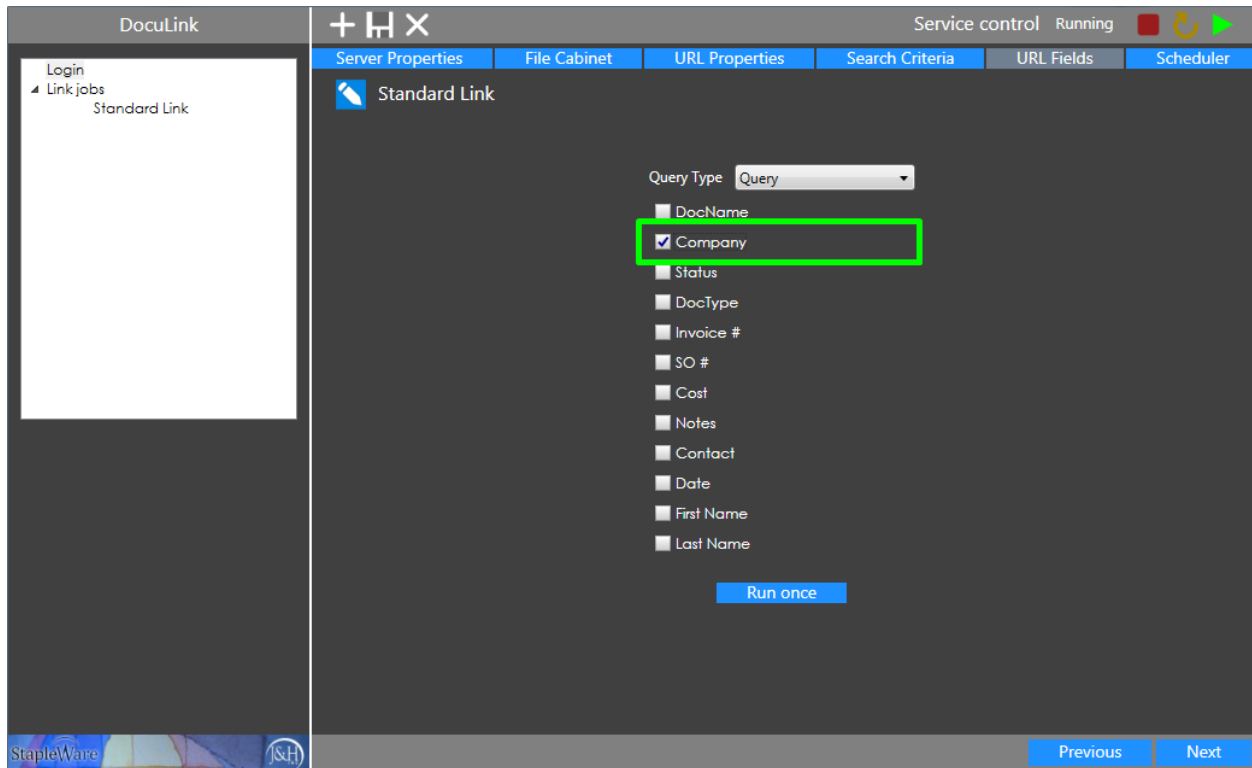
- 19) Select the checkbox next to a field to use it as a search parameter and enter a value in the corresponding textbox or date picker.
- 20) Click 'Search' to view the documents for the given search criteria.



Click the 'Next' button to move to the 'URL Fields' tab.

URL Fields

- 21) **Query Type** – Select 'DocId' if the Viewer Option on the URL Properties tab is 'Viewer' or 'Download to native viewer'. Otherwise select 'Query'.
 - a. For 'Query' select which DocuWare index fields to use in the hyperlink.
- 22) **Run Once** – Run this job once with the current configurations

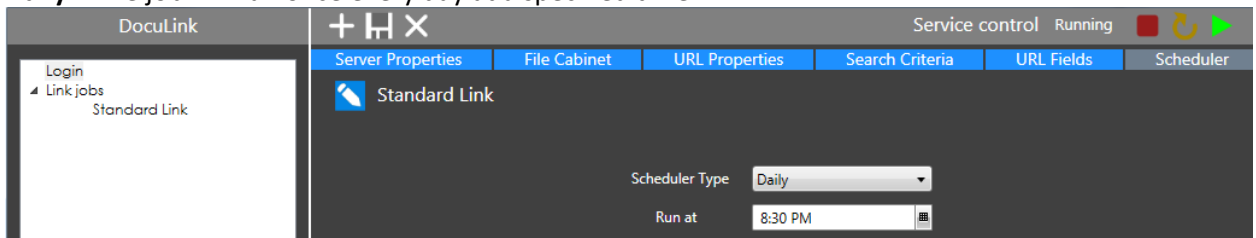


Click the 'Next' button to move to the 'Scheduler' tab.

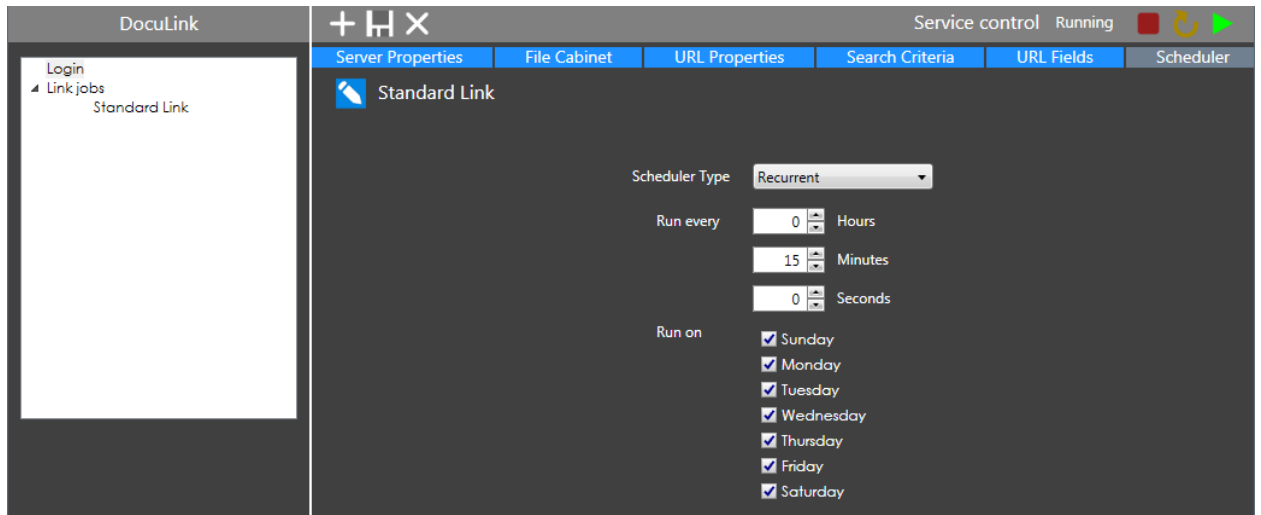
Scheduler

23) **None** – The job is not active

24) **Daily** – The job will run once every day at a specified time



25) **Recurrent** – The job will run on the specified days at the specified time interval



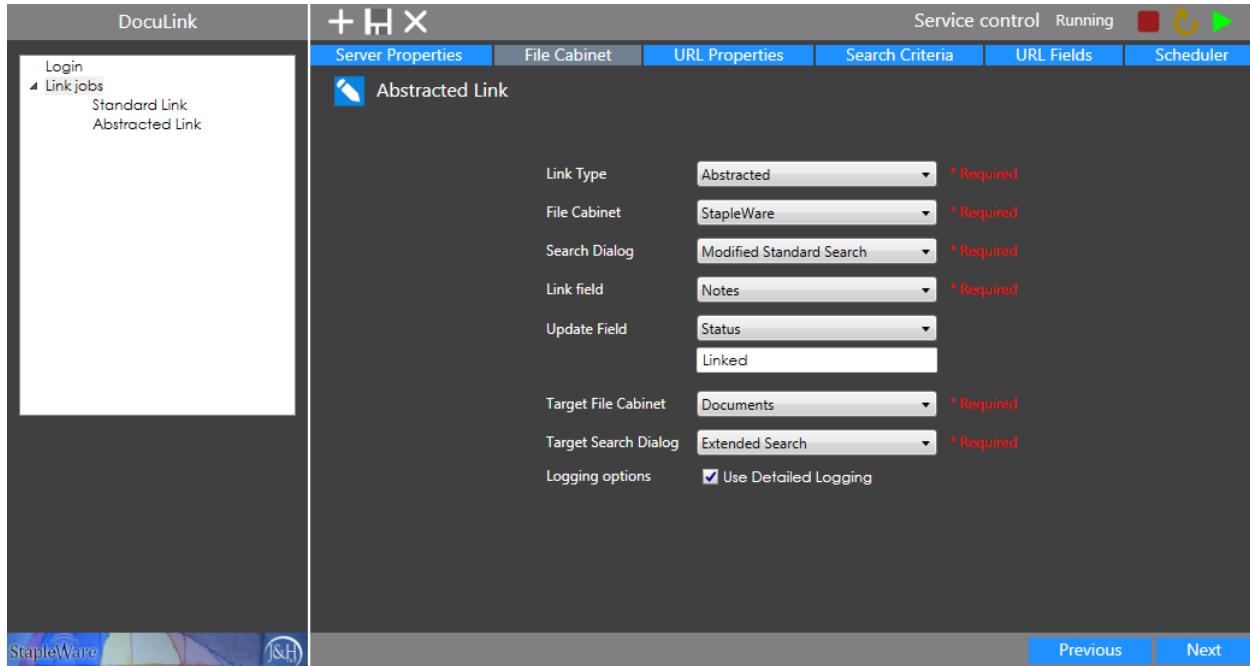
Click the 'Save' button to save the Link Job.

Abstracted Link Job Configuration

Link Jobs can create hyperlinks for index fields from one file cabinet and write the hyperlink to a different file cabinet.

File Cabinet

- 1) **Target File Cabinet** – Select the file cabinet to write links to
- 2) **Target Search Dialog** – Select the correct Search Dialog for the selected target file cabinet

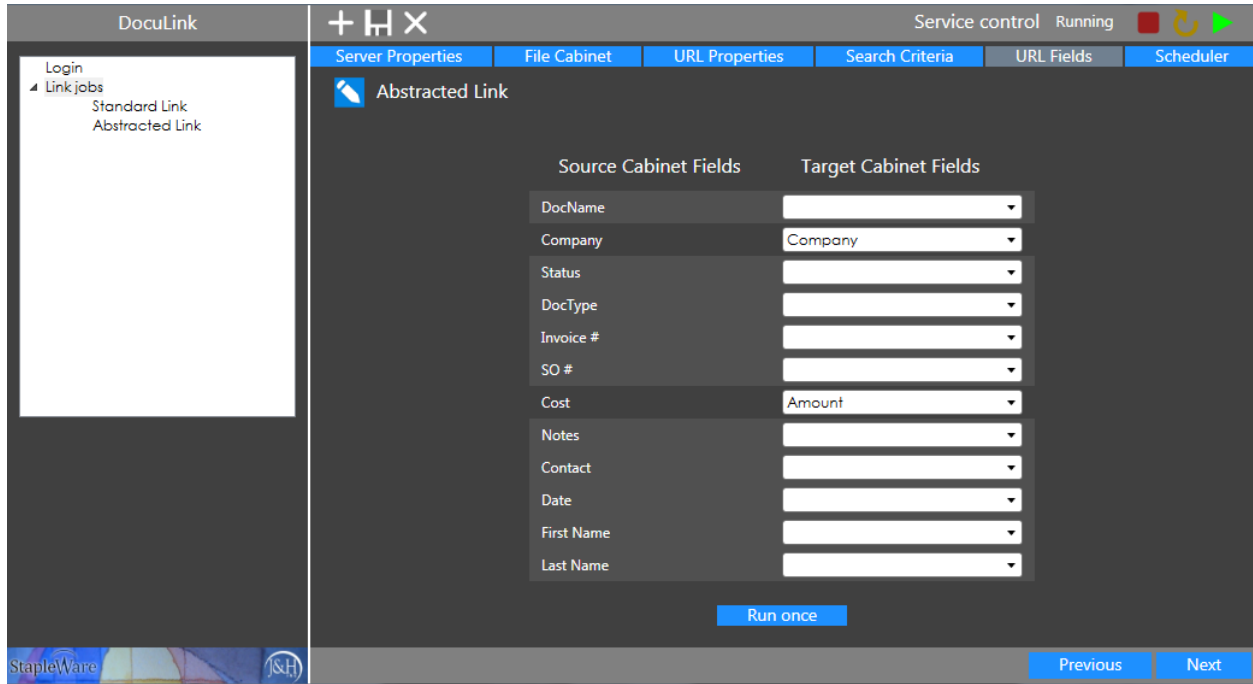


Click the 'URL Fields' tab.

URL Fields

Configure how query values from the source file cabinet are mapped to the target file cabinet.

- 3) Select a field from the 'Target Cabinet Fields' dropdown to use it as a mapped field.



Click 'Next' then 'Save' to save the Link Job.