

Stapler
Quick Start Guide
Platform Services Version

All rights reserved
Big Sky Systems, Inc. 2017

Big Sky Systems, Inc.
PO Box 4401
Bozeman, MT 59772
406-223-5463
tom@bigskysystems.biz

Stapler
Program updated by Brandon Strong
Quick Start Guide updated on 1/24/2021

Contents

Page	Description
3	Preface
3	What is Stapler?
3	Licensing
3	Installation
5	Getting Started with Stapler
6	Starting Stapler
7	Connecting to DocuWare Cloud
8	Staple Job Configuration
13	Before and After Stapling

Stapler Quick Start Guide

Preface

This manual describes basic information to use the Stapler module.

What is Stapler?

This suite of software products enhances the functionality of the DocuWare Integrated Document Management system. Stapler allows documents in a file cabinet to be stapled or clipped together based on document type, document status, document name, document number, or any other field type. This module will staple or clip documents together that are scanned and stored as individual documents. It will also clip all documents in a file cabinet that have the same grouping criteria, regardless of the type of document. Stapler can be run as a desktop application or it can be run as a Windows Service and the stapling will occur on a predefined schedule.

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.

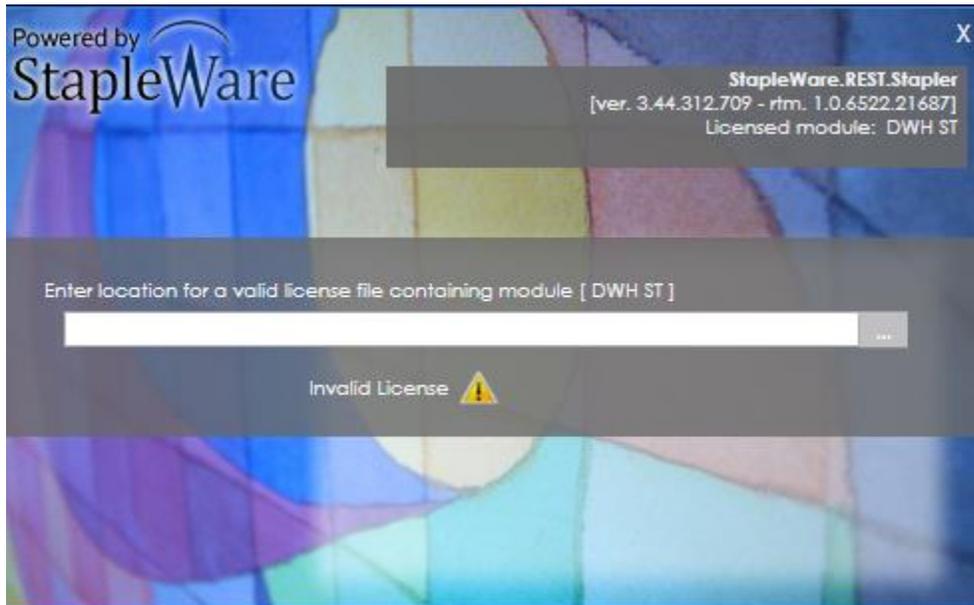
Installation

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



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

Getting Started with Stabler

The Stabler will clip or staple documents in a DocuWare file cabinet based on selected criteria. In the following screen shot all of the documents that have the same VENDOR NAME and the same DOCUMENT NUMBER will be stapled together provided the STATUS is 'APPROVED'. The documents that have the DOCUMENT NUMBER '215482153250' and the STATUS 'APPROVED' will be stapled together.

TYPE	VENDOR NAME	DOCUMENT NUMBER	STATUS	DOC TYPE
PDF	US-STEEL	215482153250	Query written	INVOICE IN
PDF	US-STEEL	215482153125	Query written	INVOICE IN
PDF	US-STEEL	215482153125	Query written	INVOICE IN
PDF	US-STEEL	215482153250	APPROVED	INVOICE IN
PDF	US-STEEL	215482153250	APPROVED	INVOICE IN
PDF	US-STEEL	215482153250	APPROVED	INVOICE IN
PDF	US-STEEL	215482153250	Query written	INVOICE IN
PDF	US-STEEL	215482153125	Query written	INVOICE IN

In the following screen shot all the documents that have the same COMPANYNUMBER and the same DOCTYPE will be clipped together provided the DOCSTATUS is 'Active'. The documents that have the DOCTYPE 'RECEIPT' will be clipped together and the documents that have the DOCTYPE 'DESIGN' will be clipped together.

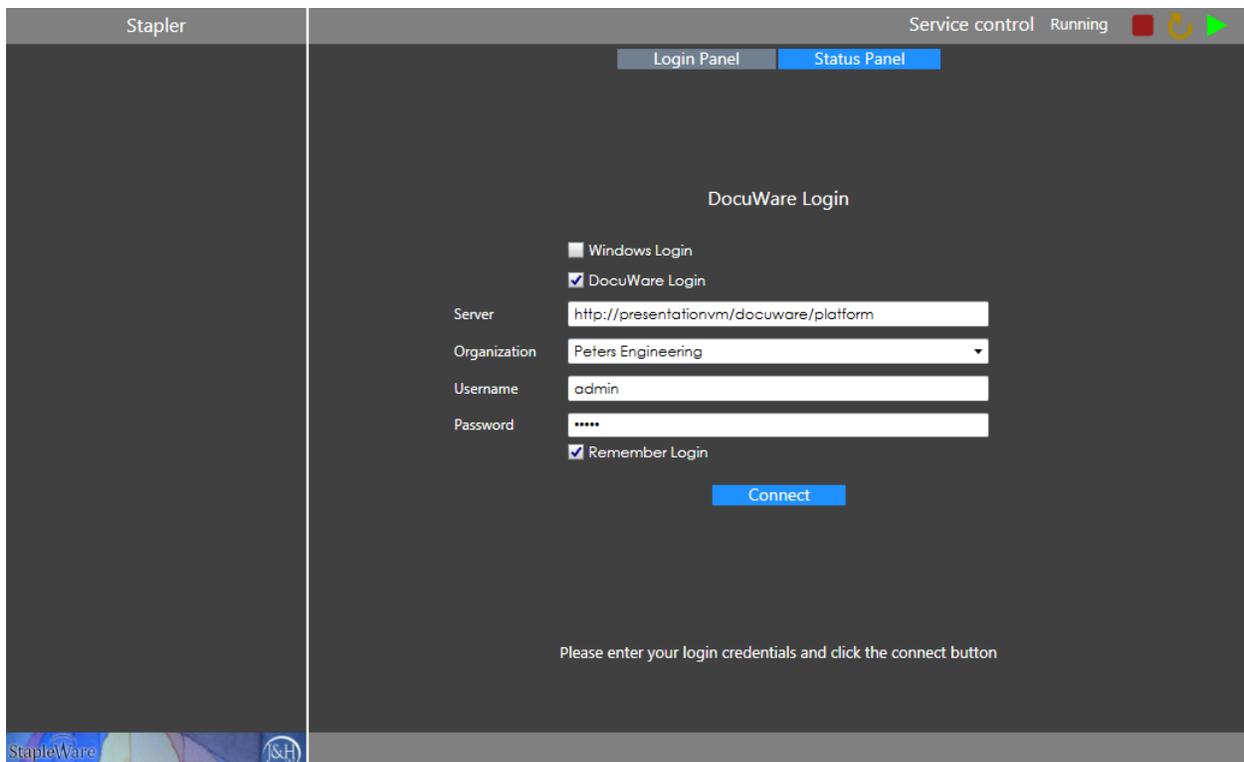
TYPE	COMPANY	COMPANYNUM...	DOCTYPE	DOCSTATUS
DOC	DOCUWARE	1	POWERPOINT	ARCHIVED
PDF	LEISURE PARTNERS	1001	RECEIPT	ACTIVE
PDF	LEISURE PARTNERS	1001	RECEIPT	ACTIVE
PDF	LEISURE PARTNERS	1001	RECEIPT	ACTIVE
PDF	LEISURE PARTNERS	1001	RECEIPT	ACTIVE
PDF	LEISURE PARTNERS	1001	DESIGN	ACTIVE
PDF	LEISURE PARTNERS	1001	LIST	ACTIVE
PDF	LEISURE PARTNERS	1001	REPORT	ACTIVE
PDF	LEISURE PARTNERS	1001	DESIGN	ACTIVE
PDF	LEISURE PARTNERS	1001	DESIGN	ACTIVE

Starting Stapler

Below is an example of the parameters of the Stapler program.

If you are upgrading Stapler from a version before 2.44.255.876, you will need to delete the C:/ProgramData/DWAddOns/Stapler folder and recreate the jobs. If this is a new install or an upgrade from version 2.44.255.876 or above then no action is needed.

The Stapler user interface needs to be run as an administrator. When you start the Stapler, be sure to right click the icon and select 'Run as administrator'. When the Stapler 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'.



Connecting to DocuWare Cloud

Stapler 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:

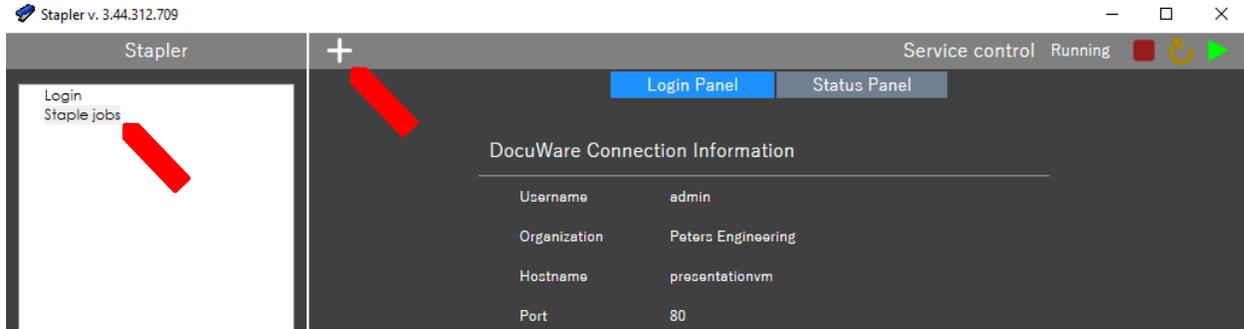
Password:

Remember Login

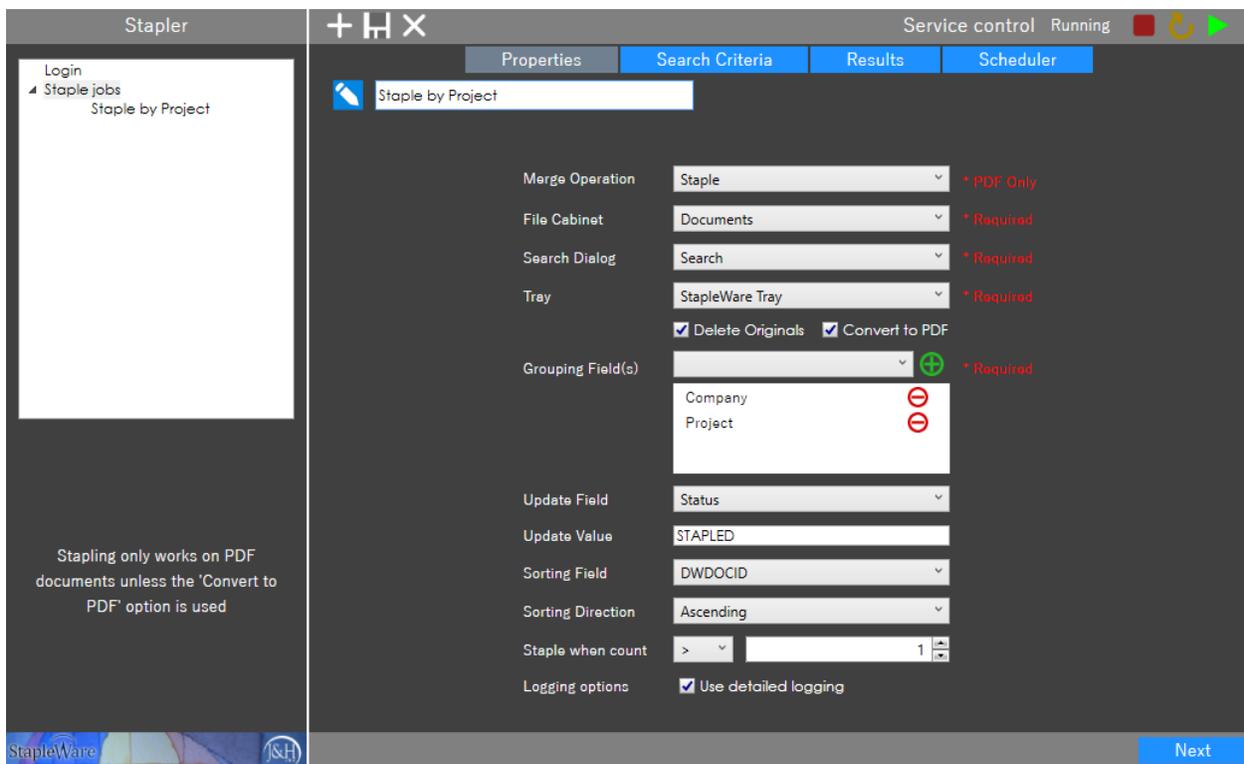
Please enter your login credentials and click the connect button

Staple Job Configuration

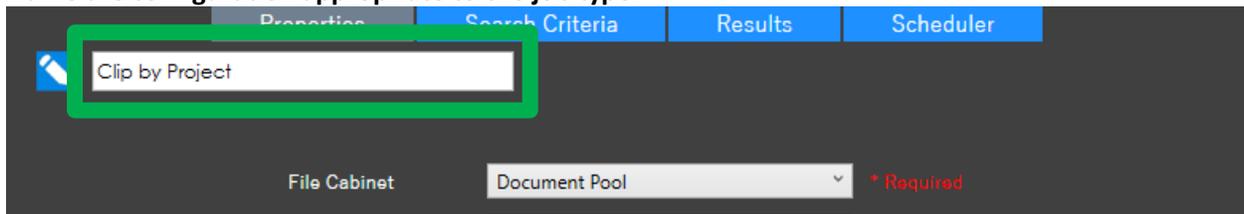
To configure a staple job, either select the 'Staple jobs' menu item and click the '+' button or right click the 'Staple jobs' menu item and select 'Add staple job'.



A configuration wizard will open on the 'Properties' tab. All of the settings can be configured for this job to merge documents in DocuWare file cabinets.



Name the configuration appropriate to the job type:



The Properties Tab

The tab will automatically move to the Search Criteria tab after clicking the Next button. The required fields are noted in red with an asterisk. You may add as many grouping fields as necessary to attain the desired results. To Clip or Staple documents by the Account Number, Document Type and Document Date fields, select all of these fields in the Grouping Field window.

- **File Cabinet** – Choose the file cabinet that contains the documents to be stapled.
- **Search Dialog** – Choose the search dialog.
- **Tray** – Tray to move documents to for stapling
- **Convert to PDF** – Convert non-PDF documents in staple group to PDF. If PDFs are in merge groups, the sorting will be changed so that PDFs are first and non-PDFs are last.
- **Delete Originals** – Delete original documents in File Cabinet after merging
- **Grouping Field(s)** – Select the field(s) in the file cabinet that will be used to group documents prior to merging them. For example, if the Vendor Number selected, then all documents that have the same Vendor number will be merged. You may add any number of grouping fields here.
- **Merge Operation** - Specify how the documents will be merged together. Stapling only works on PDFs unless 'Convert to PDF' is selected, while Clip works on any file type.
- **Update Field** – Select a field to be updated after successfully merging the documents.
- **Update Value** – Enter the value that will be written to the Update Field.
- **Sort Field** – Configure how the documents will be sorted before they are merged. For example, if documents are sorted by the DWDOCID, the documents will be sorted according to when they were stored into the file cabinet.
- **Sort Direction** – Sort the merged documents in ascending or descending order according to the Sort Field.
- **Staple when count** – Specify the number of documents that should be present before merging.

Notes:

When selecting a field from the Grouping Field dropdown, you must click the green '+' button next to add it to the list of grouping fields.

Stapling will merge the documents into one multipage PDF, and the index values are maintained from the first document only. If you select Clipping, any file type can be merged together and the index values for the documents will be maintained if Unclipped in a document tray.

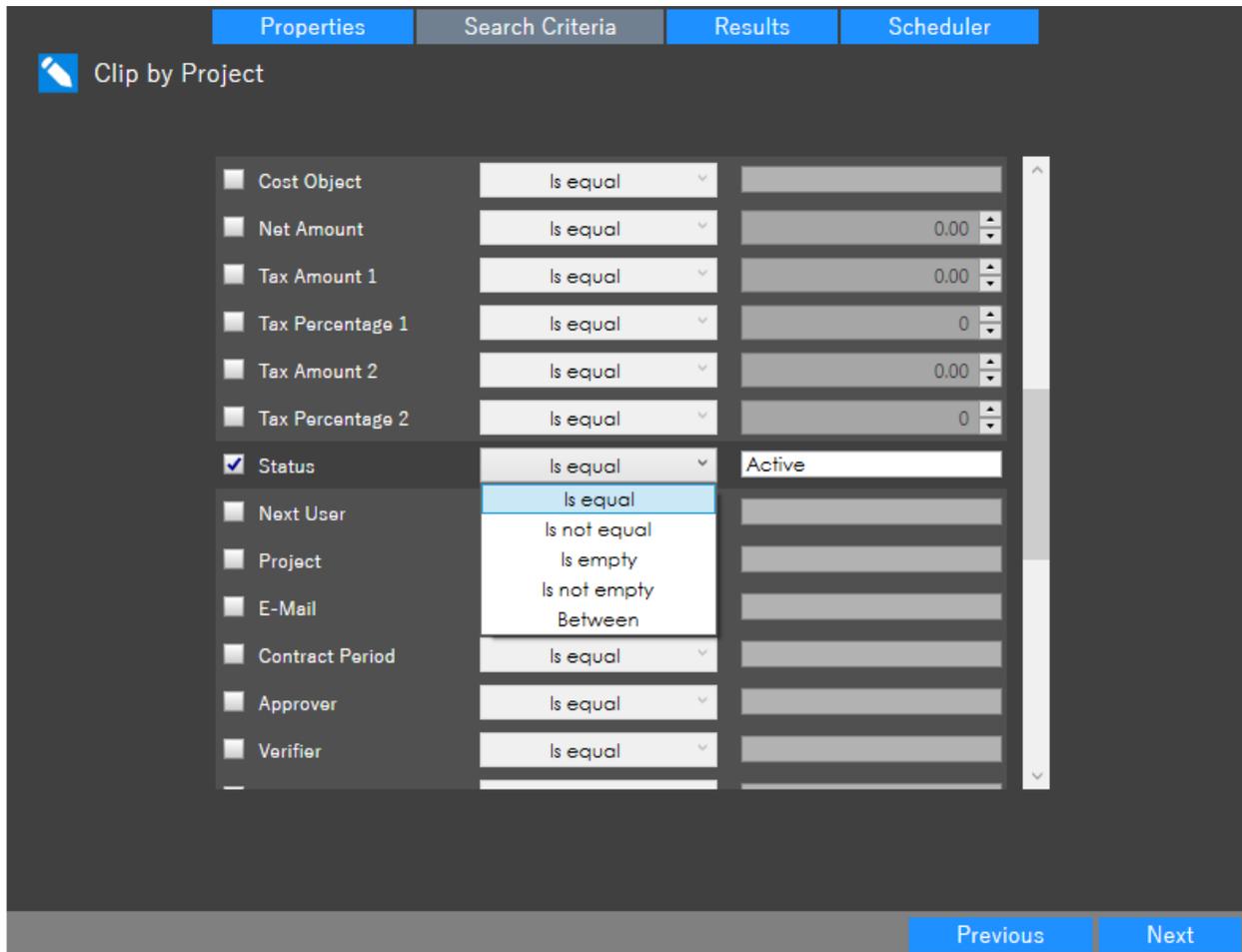
The DWDOCID and the DWSTOREDATETIME system fields have been added as Sorting Field options.

Click the Next button to move to the "Search Criteria" Tab.

Search Criteria Tab

The Stapler uses filtering to either include specific documents or exclude specific documents from the stapling or clipping process. You can use extended search options to filter as well.

Check the box next to the field name to enable it, then select the comparison operator from the dropdown, and specify the search value in the input box on the right (if applicable).



Comparison operators include: Is equal, Is not equal, Is empty, Is not empty, and Between. Additional operators include <, >, <=, >=. Any number of fields can be included in the filter. In this example, the filter is set to include only documents with a STATUS of 'Active'.

Click the Next button to move to the Results tab.

Results tab

The Results tab can be used to preview existing document groups in the file cabinet based on the defined Search Criteria, and also manually run the job.

Note: Is it not possible to undo the Stapling or Clipping process automatically. Unmerging is done manually in the Document Tray.

Properties Search Criteria Results Scheduler

Clip by Project

Get Document Groups

Company: Leisure park Moser , Project: DE2004007

DWDOCID	Company	Status	Contact	Document Type	Document Number	Order Number
25	Leisure park Moser	active	Werner Moser	Letter out		
32	Leisure park Moser	active	Werner Moser	Pricelist		

Company: Template , Project: Template

DWDOCID	Company	Status	Contact	Document Type	Document Number	Order Number
35	Template	active	Template	Template		
36	Template	active	Template	Template		
37	Template	active	Template	Template		
38	Template	active	Template	Template		
39	Template	active	Template	Template		
40	Template	active	Template	Template		
41	Template	active	Template	Template		
42	Template	active	Template	Template		
43	Template	active	Template	Template		

Run Once

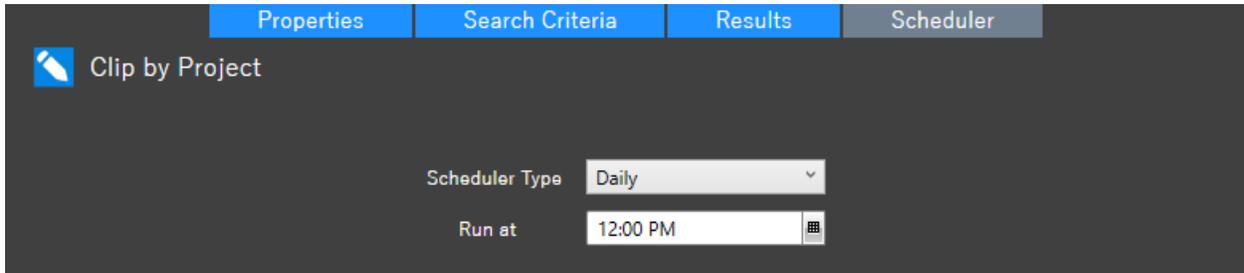
Previous Next

Click the NEXT button to move the Scheduler tab.

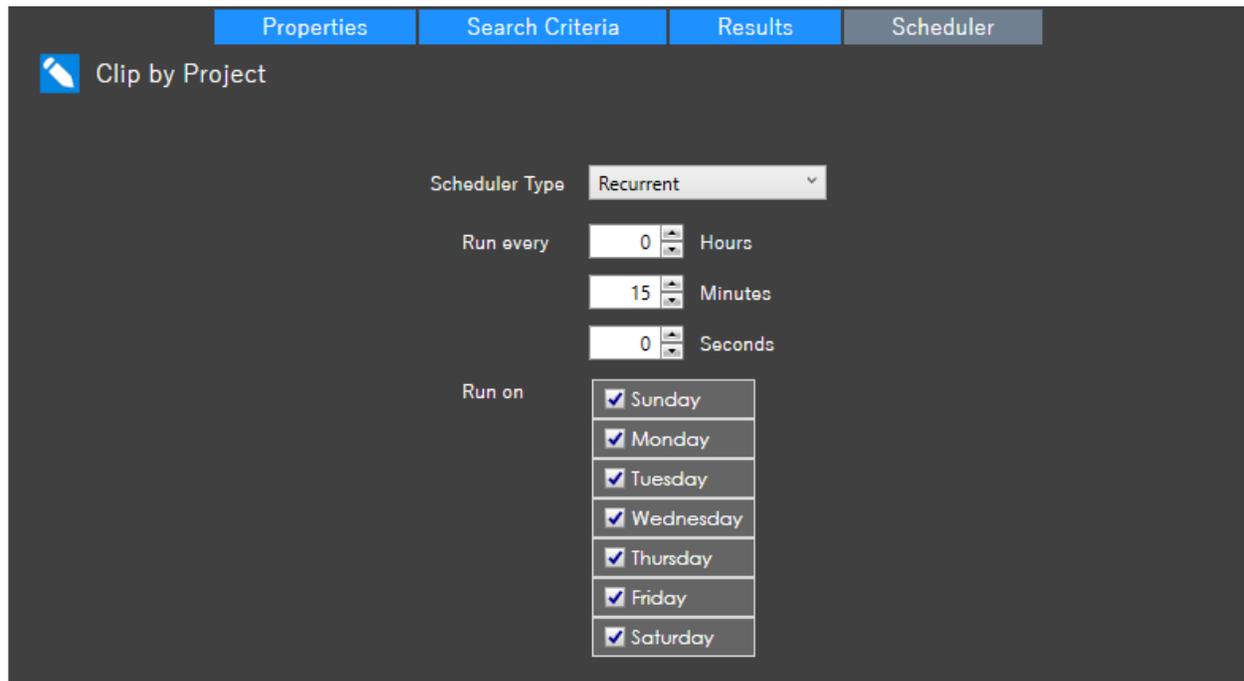
Scheduler tab

The Scheduler tab is for scheduling the jobs to run automatically according to a defined schedule. There are three options for scheduling:

1. None – disabled
2. Daily – once daily at a scheduled time
3. Recurrent – several times daily according to a time interval



The screenshot shows the 'Scheduler' tab in a software interface. At the top, there are four tabs: 'Properties', 'Search Criteria', 'Results', and 'Scheduler'. Below the tabs, there is a pencil icon and the text 'Clip by Project'. The 'Scheduler Type' dropdown menu is set to 'Daily'. Below it, the 'Run at' field is set to '12:00 PM' with a calendar icon to its right.



The screenshot shows the 'Scheduler' tab in a software interface. At the top, there are four tabs: 'Properties', 'Search Criteria', 'Results', and 'Scheduler'. Below the tabs, there is a pencil icon and the text 'Clip by Project'. The 'Scheduler Type' dropdown menu is set to 'Recurrent'. Below it, there are three input fields for 'Run every': '0' Hours, '15' Minutes, and '0' Seconds. Below these, there is a 'Run on' section with a list of days of the week, each with a checked checkbox: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday.

Click the Save button to save the job.

NOTE: THE STAPLER SERVICE MUST BE RESTARTED FOR THE JOB TO RUN.

Before and After Stapling

Example: All of the documents are separated in the file cabinet, although they all have the same Company and Project.

The screenshot shows the DocuWare interface with a search results table. The table has columns for TYPE, COMPANY, PROJECT, STATUS, and DOCUMENT TYPE. There are 10 rows of data, each with a document icon in the TYPE column.

TYPE	COMPANY	PROJECT	STATUS	DOCUMENT TYPE
	Fabrikam, Inc.	02387320875	active	Statement
	Fabrikam, Inc.	02387320875	active	Statement
	Fabrikam, Inc.	02387320875	active	Statement
	Fabrikam, Inc.	02387320875	active	Contract
	Leisure park Moser	DE2004007	active	Letter out
	Leisure park Moser	DE2004007	active	Letter out
	Leisure park Moser	DE2004007	active	Letter out
	Leisure park Moser	DE2004007	active	Letter in
	Leisure park Moser	DE2004007	active	Letter in
	Leisure park Moser	DE2004007	active	Calculation

After the Stapler runs, the documents have been merged into 2 documents, grouped by Company Name and Project.

The screenshot shows the DocuWare interface after the stapling process. The search results table now only contains 2 rows, each with a document icon in the TYPE column.

TYPE	COMPANY	PROJECT	STATUS	DOCUMENT TYPE
	Fabrikam, Inc.	02387320875	Stapled	Contract
	Leisure park Moser	DE2004007	Stapled	Calculation