



Arco

Doma 6
Application administrator manual
13. DRUM

A new era in document management.

Doma 6

Application administrator manual *13. DRUM*

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1 DRUM, the Docroom and Routing Upload Module

1.1 Introduction

1.1.1 Definition

DRUM, or the **D**ocRoom and **R**outing **U**pload **M**odule, is a tool used to do automatic uploads to DocRoom and/or Routing.

DRUM can be used to upload:

1. table records
2. dat files
3. files located in a folder on the network
4. email messages
5. ISFeed files
6. XML files
7. flat files, e.g. CSV files
8. custom data

DRUM can be activated manually or can run as a batch job on your DocRoom server.

DRUM is active on the DocRoom server and can be configured in the Doma admin module. The Doma admin module is by default installed on the server.

1.1.2 Configuration of DRUM

A number of parameters is defined in the **DRUM settings** in the Arco Doma Admin module.

To configure the DRUM module, we start with the creation of an *DRUM Input Connectors* in the Arco Doma Admin module.

A **DRUM input connector** defines which information you will add from your source. (see also *DRUM Input Connectors*)

Once the input connector is created, you can link one or more **scenarios** to it. In the scenarios, you define where and how the information will be transferred.

1.1.3 How it works - in brief

The DRUM upload is done in 3 phases:

1. Creation of XML files in the folder ISFeed and the folder DRUM In.
2. Upload of these files to DocRoom (based upon a merge of ISFeed and ISConfig) and move of the XML files from ISFeed and DRUM In to either the folder DRUM Out or the folder DRUM Error and put file from ISFeed to the subfolder ISFeed\final.
3. Give feedback from the folder IS Feed \ Final.

2 DRUM settings

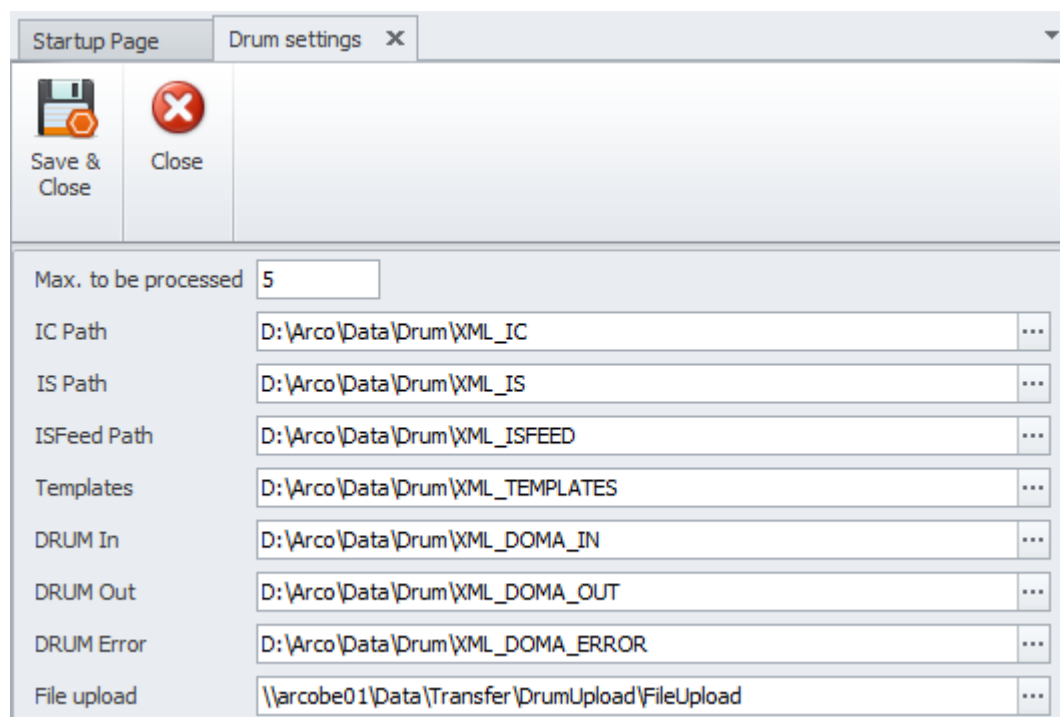
The DRUM settings contain a series of locations that are used by the DRUM module.

Two types of locations are defined:

- For test purpose (Execute upload from DomaAdmin, located on the client pc)
- Locations used by Drum batchjob (Execute upload from Drum batchjob, located on the server)

a) Test Drum configuration in DomaAdmin

In DomaAdmin, navigate to “Settings / Drum settings” in the treeview.
These settings will not be used in Drum batchjob!



Field Name	Description
Max. to be processed	Maximum number of documents that can be processed during the DomaDrum tests.
IC Path	Folder where the Input Connector xml files are copied to.
IS Path	Folder where the Input Stream xml files are copied to.
ISFeed Path	Base folder IS Feed xml files.
Templates	Folder template configuration files.
DRUM In	Base folder DRUM xml files.
DRUM Out	Base folder uploaded DRUM xml files.
DRUM Error	Base folder DRUM xml files that couldn't be uploaded.
File upload	Directory where documents are placed that need to be uploaded to Doma.

The values of this configuration are copied to the DomaAdmin.exe.config file.

b) Settings used when executing upload as batchjob

In DomaAdmin, navigate to “Settings / ArcoInfo parameters” in the treeview.
These settings will not be used when testing the upload in DomaAdmin!

The screenshot shows the 'ArcoInfo parameters' window. At the top, there's a toolbar with icons for New, Edit, Delete, Save, Filter, Refresh, Print, Export, and Close. Below the toolbar, there are three dropdown menus: APPLICATION, CUSTOM VERSION, and CATEGORY. The APPLICATION dropdown is set to 'ArcoRoutingEngine'. The CUSTOM VERSION dropdown is also set to 'ArcoRoutingEngine'. The CATEGORY dropdown is set to 'Drum'. Below these dropdowns, there's a table with two columns: NAME and VALUE. The table lists various parameters for the 'Drum' category, such as DrumError, DrumIn, DrumOut, FileUpload, ICPATH, ISFeedPath, ISPath, PurgeAfterXDays, and Templates, each with its corresponding file path or value. At the bottom of the window, there's a filter bar showing '[CATEGORY] = 'Drum'' and an 'Edit Filter' button.

NAME	VALUE
APPLICATION: ArcoRoutingEngine	
CUSTOM VERSION: ArcoRoutingEngine	
CATEGORY: Drum	
DrumError	D:\Data\Doma\Drum\XML_DOMA_ERROR
DrumIn	D:\Data\Doma\Drum\XML_DOMA_IN
DrumOut	D:\Data\Doma\Drum\XML_DOMA_OUT
FileUpload	\\arcobe01\Data\Transfer\Kathleen\FileUpload
ICPath	D:\Data\Doma\Drum\XML_IC
ISFeedPath	D:\Data\Doma\Drum\XML_ISFEED
ISPath	D:\Data\Doma\Drum\XML_IS
PurgeAfterXDays	2
Templates	D:\Data\Doma\Drum\XML_TEMPLATES

[X] [CATEGORY] = 'Drum' Edit Filter

(In the right upper corner of the "Category" box, you can apply a filter, e.g. Drum)

Field Name	Description
DrumError	Base folder DRUM xml files that couldn't be uploaded.
DrumIn	Base folder DRUM xml files.
DrumOut	Base folder uploaded DRUM xml files.
FileUpload	Directory where documents are placed that need to be uploaded to Doma.
ICPath	Folder where the Input Connector xml files are copied to.
ISFeedPath	Base folder IS Feed xml files.
ISPath	Folder where the Input Stream xml files are copied to.
PurgeAfterXDays	This is used to define the number of days before cleaning the drum logging table, This is used by another batchjob and will be explained later on in this manual.
Templates	Folder template configuration files.

The number of items to be processed cannot be set in ArcoInfo. This is set on the batchjob level. This is explained later on in this manual.

3 DRUM Input Connectors

3.1 Introduction

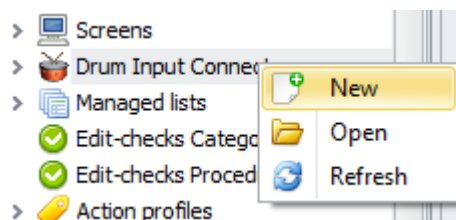
A DRUM input connector defines which information you will add from your source.

You can link one or more **scenarios** to an input connector.
In the scenarios, you define where and how the information will be transferred.

3.2 How to create an input connector

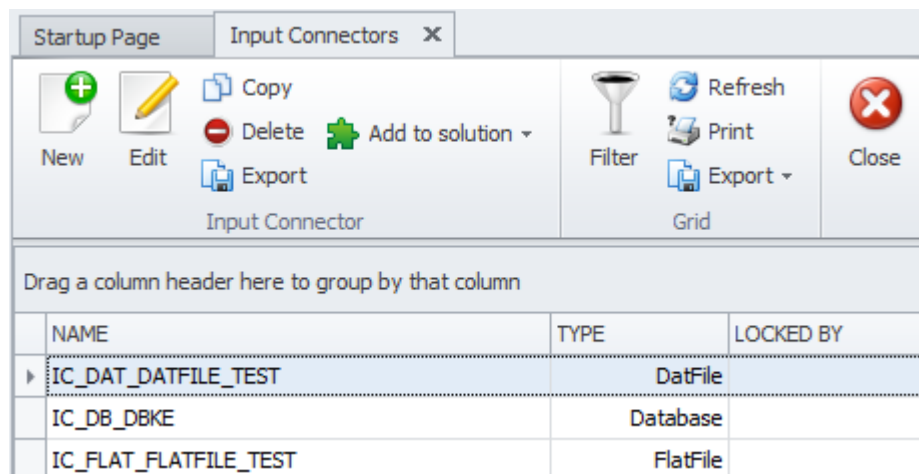
How to create an input connector in the Arco Doma Admin module.

- Start the Doma admin module.
- Open the item **“Configuration”** in the navigation tree.
- Put the cursor on the item **“Drum Input Connectors”** of the navigation tree.



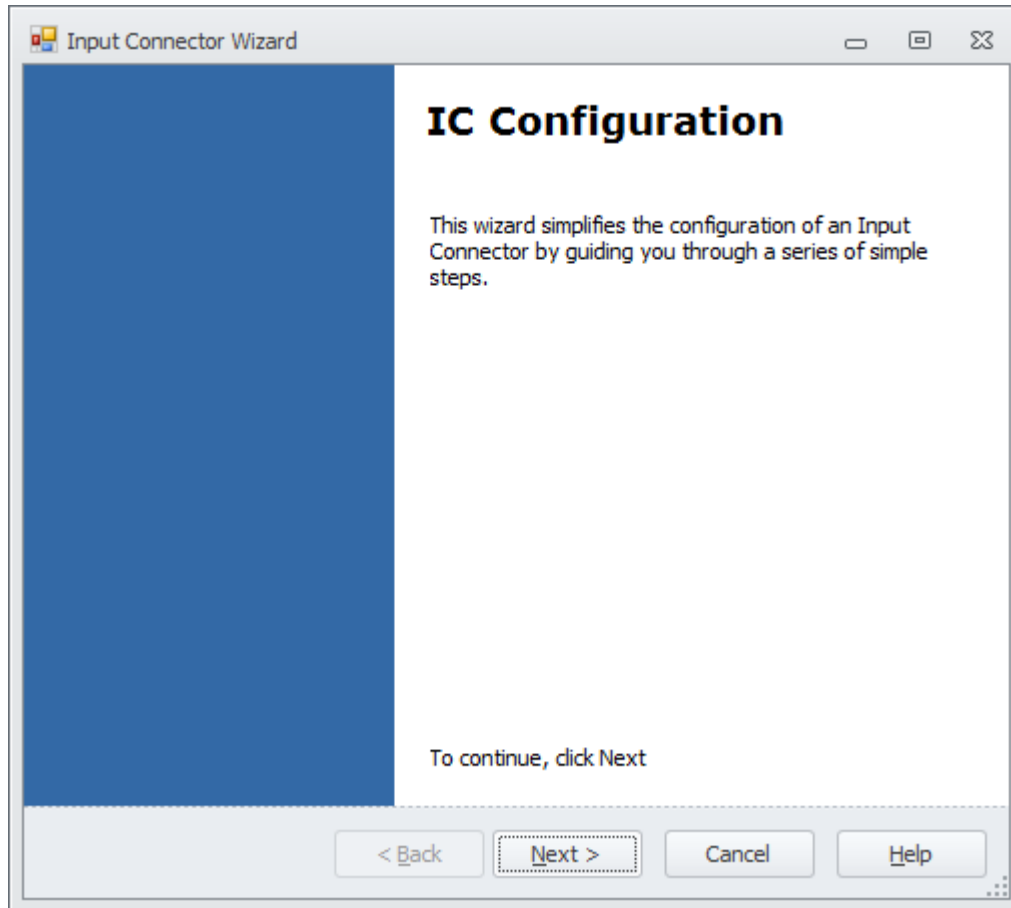
- Click on the right mouse button - a context menu appears.
- Select the option **“New”**.

Or open the list of Drum Input Connectors (“Open” in context menu)



*A tab with an overview of all existing input connectors now appears.
Click on the “New” icon in the toolbar or click on the “New” icon in the context menu of the grid or press the keys [CTRL] + [N]*

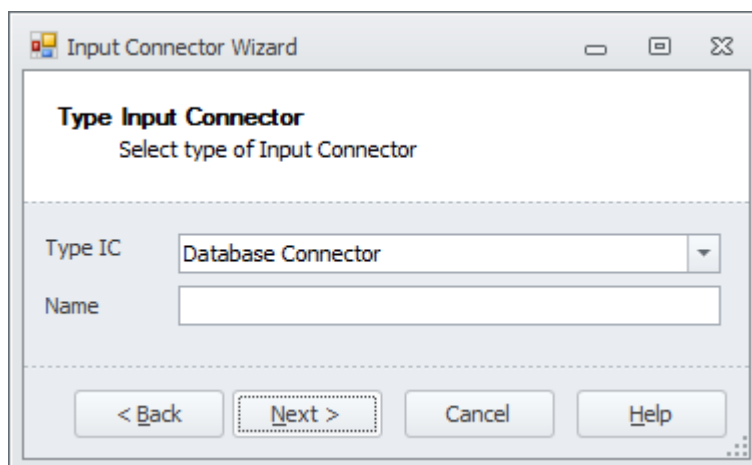
- The Input Connector wizard appears.



- Click on the button **Next** to go to the next screen:
- See below to create the Input Connector of your choice.

3.2.1 Configuration of an IC Database Connector

The Type Input Connector selection screen appears:



Type IC Select "Database Connector".
Name Enter a name for your input connector.

Click on the button **Next** to go to the next screen:

The data to be entered is depending of the database type.

a) ODBC

DSN	Data source name
Uid	Database User name
Pwd	Database Password
Dbq	Database

b) SQLSERVER

Server	Server name
User Id	Database User name
Password	Database Password
Database	Database

c) ORACLE

Data Source	Data source
User Id	Database User name
Password	Database Password

d) OLEDB

Data Source	Data source
User Id	Database User name
Password	Database Password
Provider	Provider

Or you can enter the connection string when you set Advanced to True. (not preferable)

Click on the button **Next** to go to the next screen:

(When you press the next button, the database connection will be tested, An error message is shown when the connection fails)

Table	Select one of the tables in the combo box.
Filter	Where clause of SQL statement. Optional.
Order by	Order by clause of SQL statement. Optional.
Primary Key column	A field which contains unique values.
Status column	Select one of the fields in the combo box.
Status value – To be processed	A field which will hold the status of the upload.
Status value – In Progress	Select one of the fields in the combo box.
Test database connection	Enter value to mark the record as “To be processed”, please be aware of the data type of the field (length, type). Enter value to mark the record as “In progress”, please be aware of the data type of the field (length, type). Executes two SQL statements with data you entered: SELECT [PK] FROM [TABLE] WHERE [FILTER] AND [STATUS] = [TOBEPROCESSED] ORDER BY [ORDERBY] UPDATE [TABLE] SET [STATUS] = [TOBEPROGRESSED] WHERE [PK] = [LAST ID RETRIEVED IN PREVIOUS SQL STATEMENT] A messagebox pops up to show the result of the test

e.g.

All records of table **DRUM_UPLOAD** with status **I** will be uploaded. While uploading, the status will be set to **P**.

Click on the button **Next** to go to the next screen:

Define here the feedback.

Feedback success: action to be performed when record has been processed successfully.

Nothing

Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Status or Delete instead.

Status (preferable)

Update status (enter status field, please use another value than defined in previous screen). Optional it's possible to fill in DIN and TechID.

Delete

Deletes the record.

Feedback failed: action to be performed when record has not been processed in case of errors.

Nothing

Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Status instead.

Status (preferable)

Update status (enter status field, please use another value than defined in previous screen). Optional it's possible to fill in Error code and

description.

e.g.

Record has been uploaded successfully:

Update status to U and fill in DIN and TECHID

Record has not been uploaded successfully:

Update status to E and fill in ERRCODE and ERRMSG

Click on the button **Next** to go to the next screen:

Please perform the steps defined in chapter 3.2.9

Click on the button **Next** to go to the next screen:


Click on the button **Finish** to close the wizard.

3.2.2 Configuration of an IC Dat file Connector


The Type Input Connector selection screen appears:


Type IC Select "Dat File Connector".
Name Enter a name for your input connector.


Click on the button **Next** to go to the next screen:

Base path Input folder. Click on the **browse** button  next to the field to select the location.

Backup processed files Set this to true if you want to back up the files

Backup path Backup folder (Backup processed files = True). Click on the **browse** button  next to the field to select the location.

Error path Error folder. Click on the **browse** button  next to the field to select the location.

Template file Template file. Click on the **open** button  next to the field to select the file.

Extension	File extension (only one file extension allowed)
Separator	Separator between field and value
Multi field separator	String to be replaced by Carriage Return Line Feed

e.g.

Content dat file:

ID<->1222
NAME<->Demo
TYPE<->Document
PROP1<->Property 1 value[CRLF]2nd line
PROP2<->Property 2 value
FILE<->Demo1.docx

Click on the button **Next** to go to the next screen:


Define here the feedback.

Feedback success: action to be performed when DAT file has been processed successfully.

Nothing

Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Move or Delete instead.

Move dat file to folder (preferable)

Move DAT file to another folder. Click on the **browse** button  next to the field to select the location.

Delete dat file

Deletes the DAT file.

Feedback failed: action to be performed when DAT file has not been processed in case of errors.

Nothing

Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Move instead.

Move dat file to folder (preferable)

Move dat file to another folder. Click on the **browse** button next to the field to select the location.

Click on the button **Next** to go to the next screen:

Please perform the steps defined in chapter 3.2.9

Click on the button **Next** to go to the next screen:




Click on the button **Finish** to close the wizard.

3.2.3 Configuration of an IC File Upload Connector

The Type Input Connector selection screen appears:

Type IC Select “File Upload Connector”.
Name Enter a name for your input connector.

Click on the button **Next** to go to the next screen:

Folder Location of the files that need to be uploaded. Click on the **browse** button  next to the field to select the location.

Subfolders If checked, subfolders are also processed

File extensions Only files, of which the extension is mentioned in this field, are processed. A user can enter multiple extensions, separated with a space. When you leave this field empty, all files will be uploaded.

Allow unknown file extensions This checkbox is only enabled when no values are added in the field File extensions.
 If the field File extensions is left empty and the option “*Allow unknown file extensions*” is selected, files with unknown file extensions (i.e. file extensions not defined in Doma) will not be skipped.

e.g.

Files with extension DOC, DOCX, XLS, XLSX, TXT and PDF in folder D:\Data\Doma\Drum\FILE UPLOAD\Input - and subfolders - will be uploaded to Doma.

Click on the button **Next** to go to the next screen:


Define here the feedback.

Feedback success: action to be performed when file has been processed successfully.

Nothing

Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Move or Delete instead.

Move file to folder (preferable)

Move file to another folder. Click on the **browse** button  next to the field to select the location.

Delete file

Deletes the file.

Feedback failed: action to be performed when file has not been processed in case of errors.

Nothing

Perform nothing; this can be chosen if you choose to run

Move file to folder (preferable)

the upload only once. When executing the upload on a regular basis (i.e. batch job), use Move instead.

Move file to another folder. Click on the **browse** button



next to the field to select the location.

e.g.

Input Connector Wizard

File Upload Connector
Enter settings for this input connector (2/2)

Feedback Success

☐ Nothing

☒ Move file to folder

☐ Delete file

D:\Data\Doma\Drum\FILE UPLOAD\Success

Feedback Failed

☐ Nothing

☒ Move file to folder

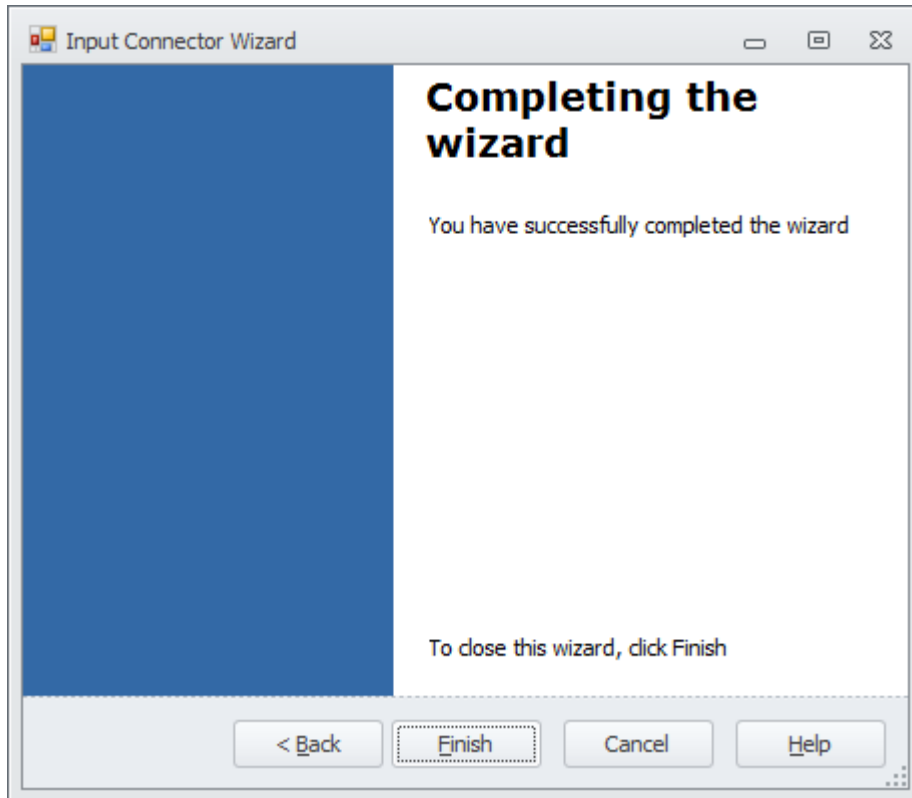
D:\Data\Doma\Drum\FILE UPLOAD\Failed

< Back Next > Cancel Help

Click on the button **Next** to go to the next screen:

Please perform the steps defined in chapter 3.2.9

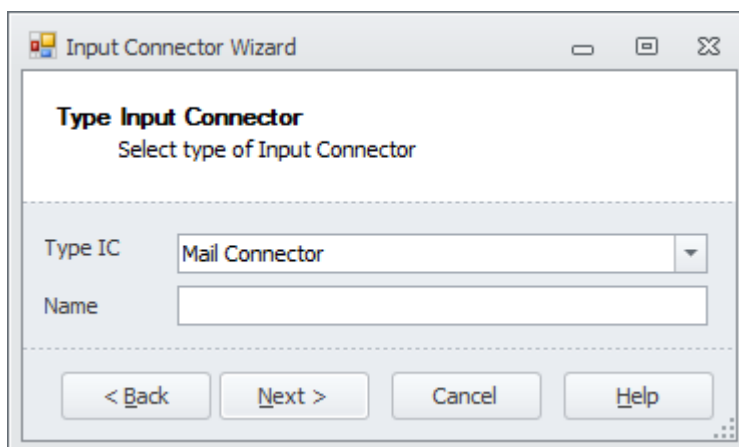
Click on the button **Next** to go to the next screen:



Click on the button **Finish** to close the wizard.

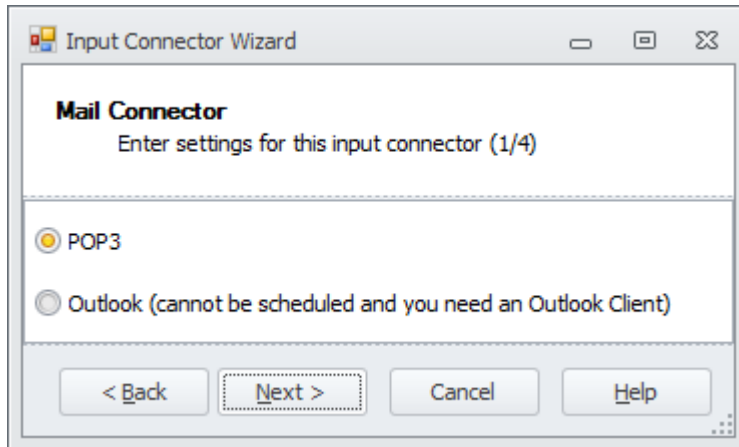
3.2.4 Configuration of an IC Mail Connector

The Type Input Connector selection screen appears:



Type IC Select "Mail Connector".
Name Enter a name for your input connector.

Click on the button **Next** to go to the next screen:



You can choose between POP3 and Outlook. Outlook is a client application and can therefore not be scheduled.

Click on the button **Next** to go to the next screen.

3.2.4.1 POP3

Server Mail server name
User name POP3 account: user name
Password POP3 account: password

Click on the button **Next** to go to the next screen.

(When you press the next button, the database connection will be tested, An error message is shown when the connection fails)

Filter – Recipient contains

Filter on mail item's "To" field. "IndexOf" method is used to perform "Contains".

Filter – Sender contains

Filter on mail item's "SenderName" field. "IndexOf" method is used to perform "Contains".

Filter – Subject contains

Filter on mail item's "Subject" field. "IndexOf" method is used to perform "Contains".

Custom IC Properties

Define IC Properties based on mail item's "Subject" field. Regular expression is used.

```
If Regex.IsMatch(vsSubject,
loMailRegex.RegularExpression,
RegexOptions.IgnoreCase) = True Then
    Dim loMatch As Match = Regex.Match(vsSubject,
loMailRegex.RegularExpression,
RegexOptions.IgnoreCase)
    lsValue = loMatch.Value
    If loMatch.Groups.Count > 1 Then
        lsValue = loMatch.Groups(1).Value
    End If
End If
```

Click on the button **Next** to go to the next screen.

Define here the feedback.

Feedback success: action to be performed when e-mail item has been processed successfully.

Nothing Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Delete instead.

Delete mail object (preferable) Deletes the e-mail item.

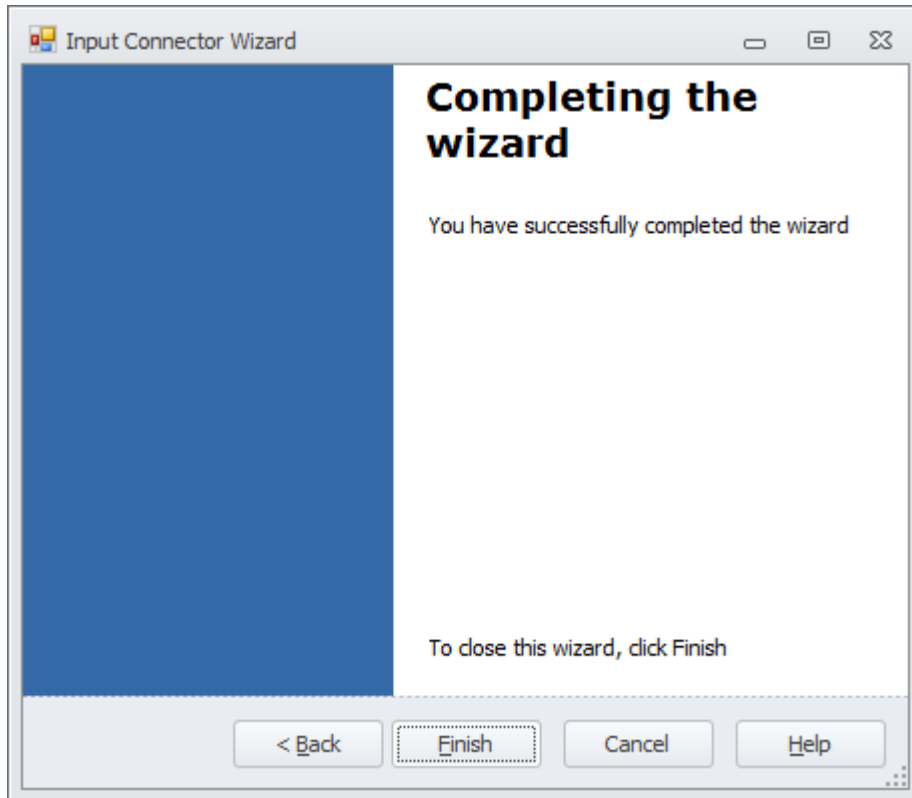
Feedback failed: action to be performed when e-mail item has not been processed in case of errors.

Nothing Perform nothing.

Click on the button **Next** to go to the next screen:

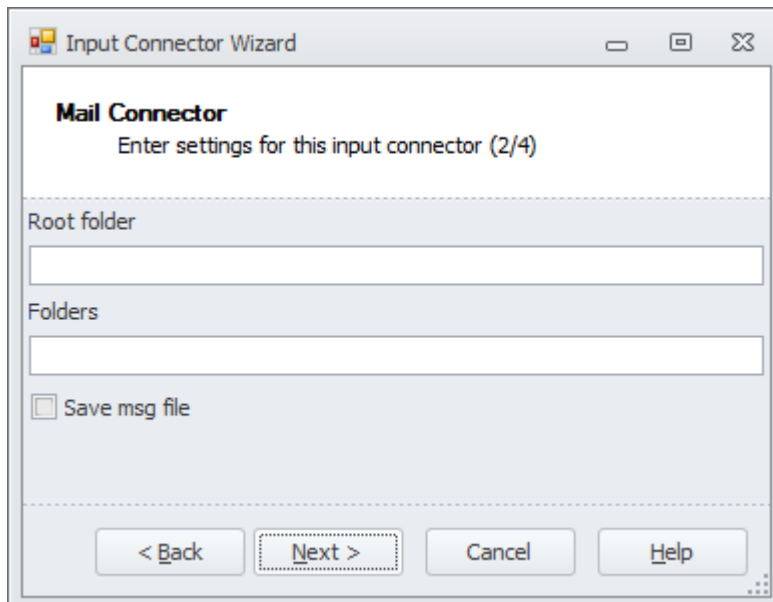
Please perform the steps defined in chapter 3.2.9

Click on the button **Next** to go to the next screen:



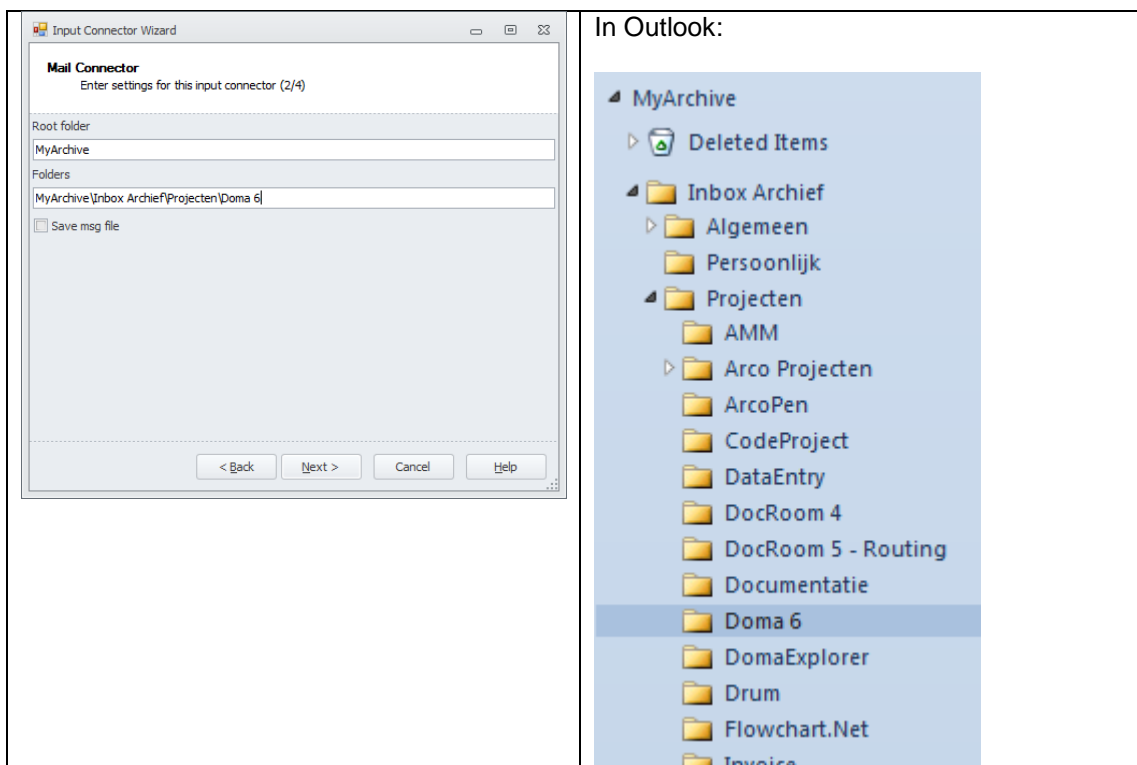
Click on the button **Finish** to close the wizard.

3.2.4.2 Outlook

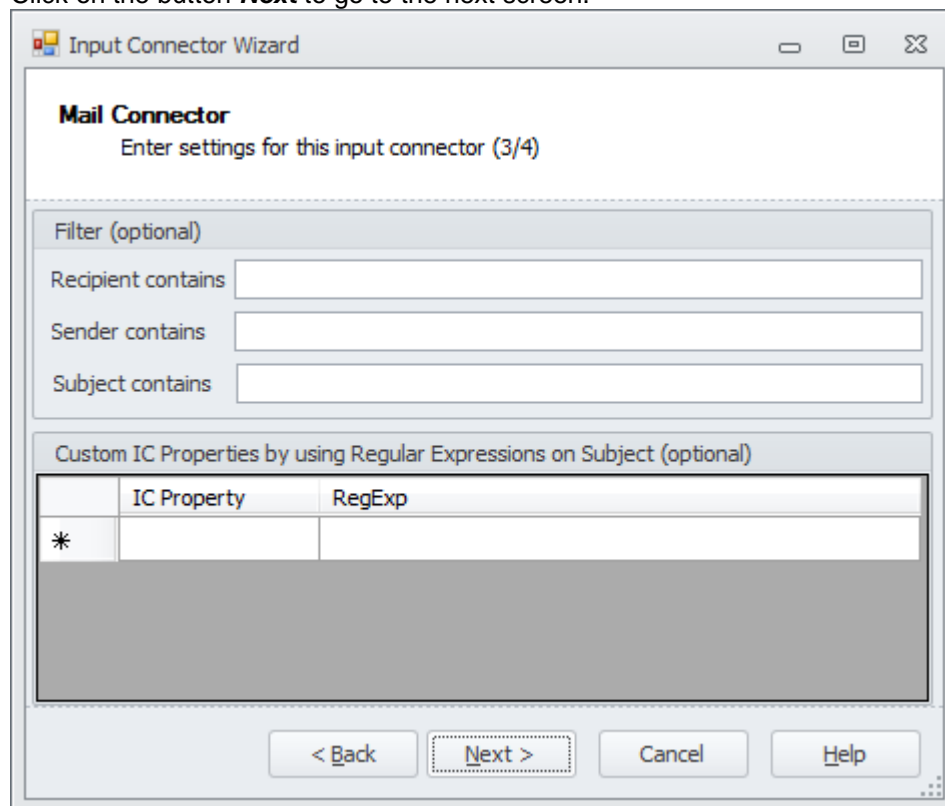


- Root folder** Name of the root folder.
- Folders** Complete path of the folder. You can define more than one folder, use “;” as separator.
- Save msg file** Save mail item in msg format. Use this if you want to upload msg files.

e.g.



Click on the button **Next** to go to the next screen.



Filter – Recipient contains

Filter on mail item's "To" field. "IndexOf" method is used to perform "Contains".

Filter – Sender contains

Filter on mail item's "SenderName" field. "IndexOf" method is used to perform "Contains".

Filter – Subject contains

Filter on mail item's "Subject" field. "IndexOf" method is used to

Custom IC Properties

perform "Contains".

Define IC Properties based on mail item's "Subject" field.

Regular expression is used.

```
If Regex.IsMatch(vsSubject,
loMailRegEx.RegularExpression,
RegexOptions.IgnoreCase) = True Then
    Dim loMatch As Match = Regex.Match(vsSubject,
loMailRegEx.RegularExpression,
RegexOptions.IgnoreCase)
    lsValue = loMatch.Value
    If loMatch.Groups.Count > 1 Then
        lsValue = loMatch.Groups(1).Value
    End If
End If
```

Click on the button **Next** to go to the next screen.

Define here the feedback.

Feedback success: action to be performed when e-mail item has been processed successfully.

Nothing

Perform nothing; this can be chosen if you choose to run the upload only once.

Move to folder (preferable)

Move e-mail item to another outlook folder. If you choose this option, an extra field is displayed to enter the folder.

Delete mail object

Deletes the e-mail item.

Update subject

Renames the subject. If you choose this option, an extra field is displayed to enter the new subject.

Feedback failed: action to be performed when e-mail item has not been processed in case of errors.

Nothing

Perform nothing; this can be chosen if you choose to run the upload only once.

Move to folder (preferable)

Move e-mail item to another outlook folder. If you choose this option, an extra field is displayed to enter the folder.

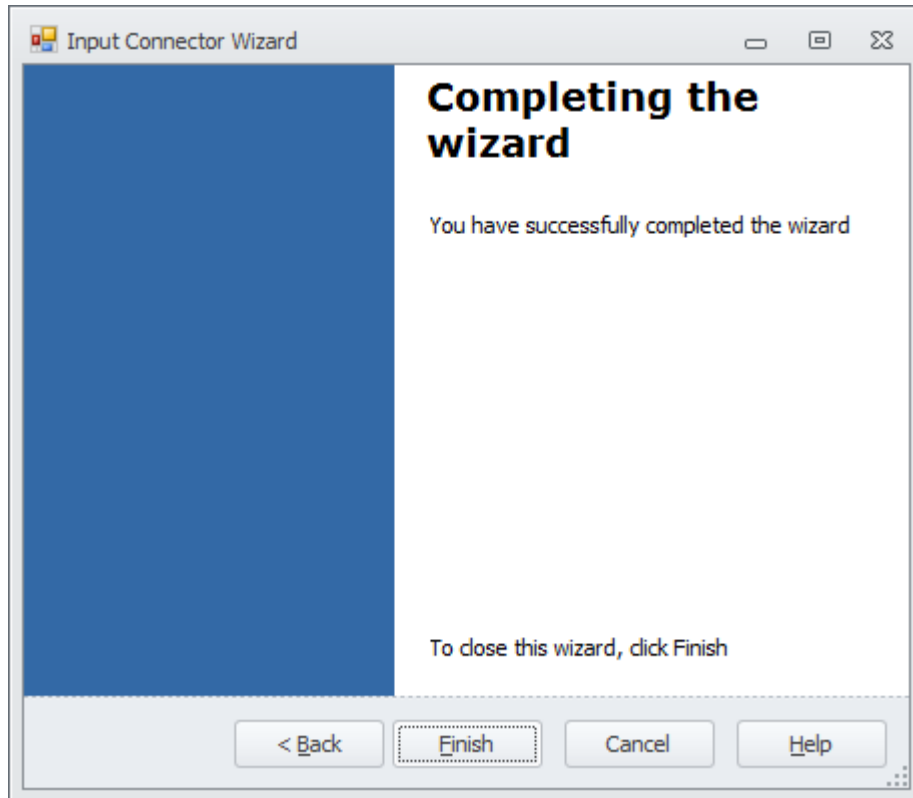
Update subject

Renames the subject. If you choose this option, an extra field is displayed to enter the new subject.

Click on the button **Next** to go to the next screen:

Please perform the steps defined in chapter 3.2.9

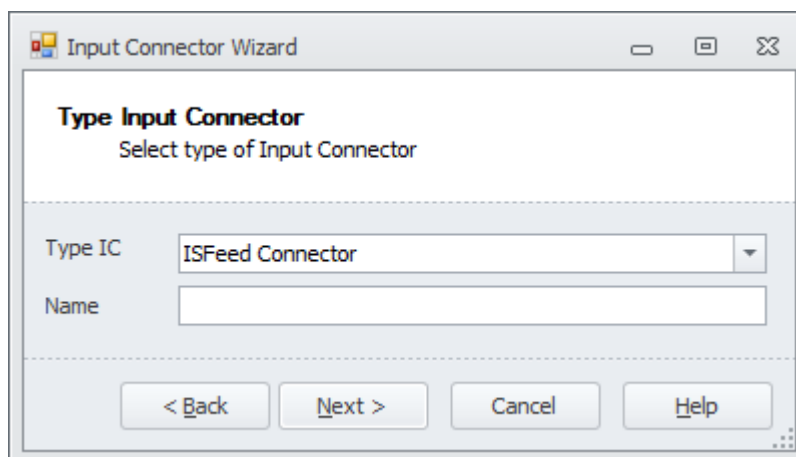
Click on the button **Next** to go to the next screen:



Click on the button **Finish** to close the wizard.

3.2.5 Configuration of an IC ISFeed Connector

The Type Input Connector selection screen appears:



Type IC Select "ISFeed Connector".

Name Enter a name for your input connector.

Click on the button **Next** to go to the next screen:

The screenshot shows a window titled 'Input Connector Wizard' with a sub-header 'ISFeed Connector' and the instruction 'Enter settings for this input connector'. Below this, there are three input fields: 'Folder', 'Subfolders' (with an unchecked checkbox), and 'Template file'. Each field has a text box and a browse button (three dots). At the bottom, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'. The 'Next >' button is highlighted with a dashed border.

Folder Location of the files that need to be uploaded. Click on the **browse** button [...] next to the field to select the location.

Subfolders If checked, subfolders are also processed.

Template file Template file. Click on the **open** button [...] next to the field to select the file.

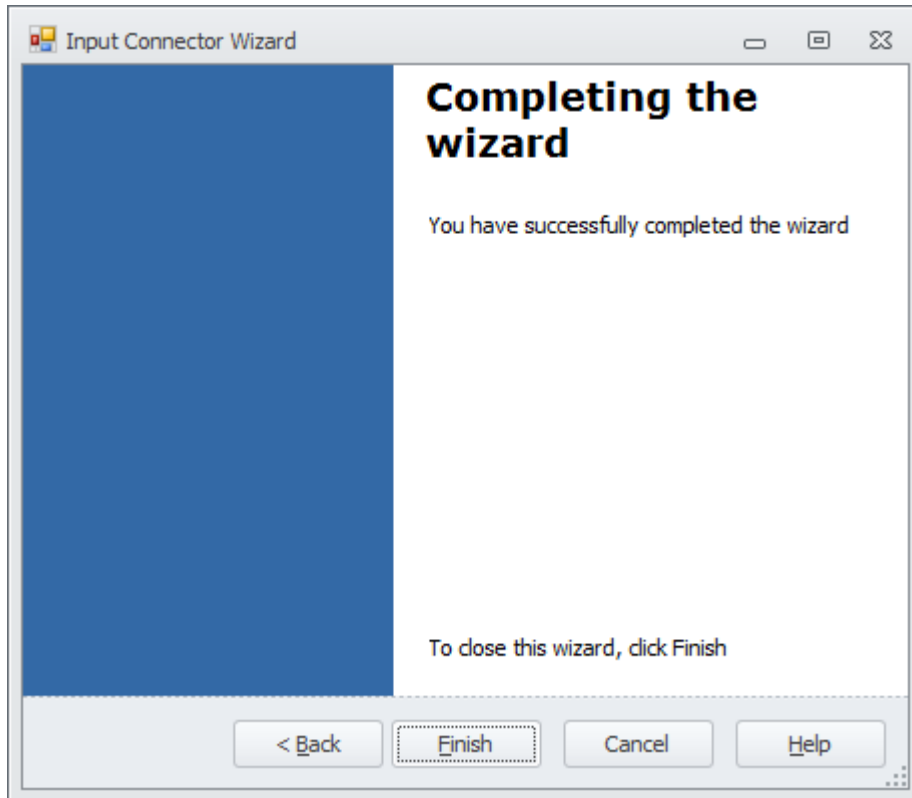
e.g.

This screenshot shows the same 'Input Connector Wizard' window, but with example values entered. The 'Folder' field now contains the path 'D:\Data\Doma\Drum\ISFEED UPLOAD\Input' and the 'Template file' field contains 'D:\Data\Doma\Drum\XML_TEMPLATES\DemoISFeedTemplate.xml'. The 'Next >' button remains highlighted.

Click on the button **Next** to go to the next screen:

Please perform the steps defined in chapter 3.2.9

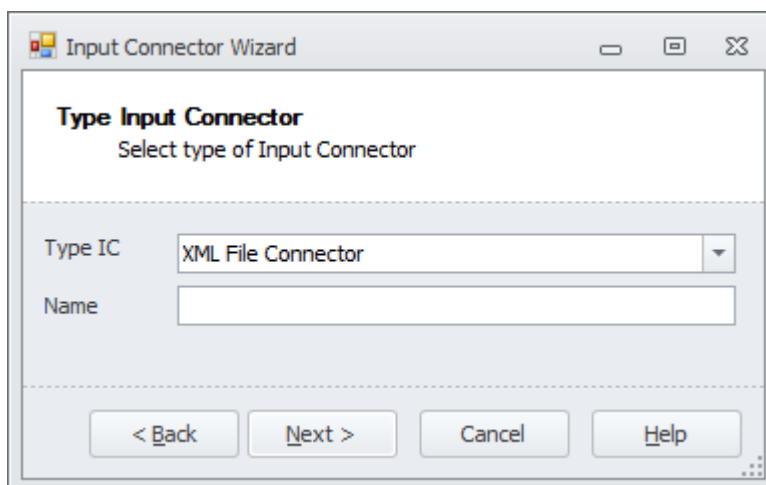
Click on the button **Next** to go to the next screen:



Click on the button **Finish** to close the wizard.




3.2.6 Configuration of an IC XML File Connector

The Type Input Connector selection screen appears:



Type IC Select "XML File Connector".
Name Enter a name for your input connector.

Click on the button **Next** to go to the next screen:

- | | |
|------------------------|---|
| Folder | Location of the files that need to be uploaded. Click on the browse button  next to the field to select the location. |
| Subfolders | If checked, subfolders are also processed |
| File extensions | Only files, of which the extension is mentioned in this field, are processed. A user can enter multiple extensions, separated with a space. |
| Template file | Template file. Click on the open button  next to the field to select the file. |
| Transform file | Transform file. Click on the open button  next to the field to select the file. |

e.g.

Input Connector Wizard

XML File Connector
Enter settings for this input connector (1/3)

Folder
D:\Data\Doma\Drum\XML FILE UPLOAD\Input

☐ Subfolders

File extensions
XML

Template file
D:\Data\Doma\Drum\XML_TEMPLATES\DemoXmlFileTemplate.xml

Transform file

< Back Next > Cancel Help

Click on the button **Next** to go to the next screen:

XML File Connector
Enter settings for this input connector (2/3)

DOCUMENT

- ID
- TITLE
- AUTHOR
- FILE
- ACTION

Add

	NAME	NODE	ATTRIBUTE	FILTER ATTRI...	FILTER VALUE
I	DOCTITLE	DOCUMENT/TITLE			

Delete

Test

< Back Next > Cancel Help

The treeview is filled with your data from the template file.

Click the “Add” button to add the selection to the grid. It’s possible to add a node or an attribute to the grid.

Click the “Test” button when you are finished with adding the nodes to the grid.

If you have nodes with the same name, you have to use the filter attribute and filter value.

Click on the button **Next** to go to the next screen:


Define here the feedback.

Feedback success: action to be performed when XML file has been processed successfully.

Nothing

Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Move or Delete instead.

Move xml file to folder
(preferable)

Move XML file to another folder. Click on the **browse** button  next to the field to select the location.

Delete xml file


Deletes the XML file.

Feedback failed: action to be performed when XML file has not been processed in case of errors.

Nothing

Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Move instead.

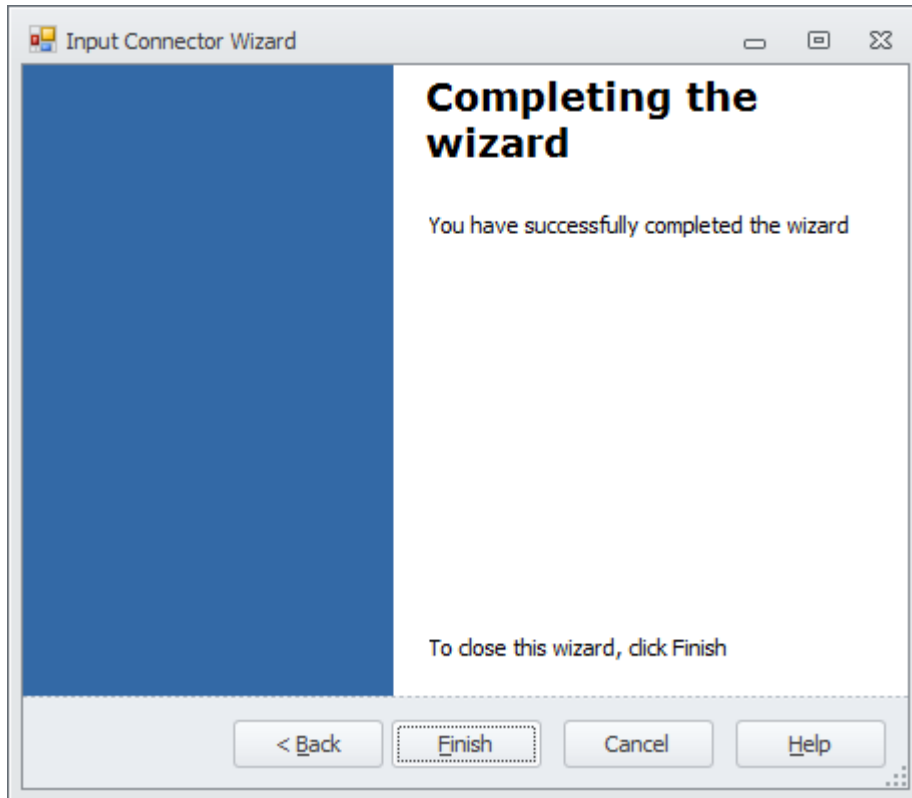
Move xml file to folder
(preferable)

Move XML file to another folder. Click on the **browse** button  next to the field to select the location.

Click on the button **Next** to go to the next screen:

Please perform the steps defined in chapter 3.2.9

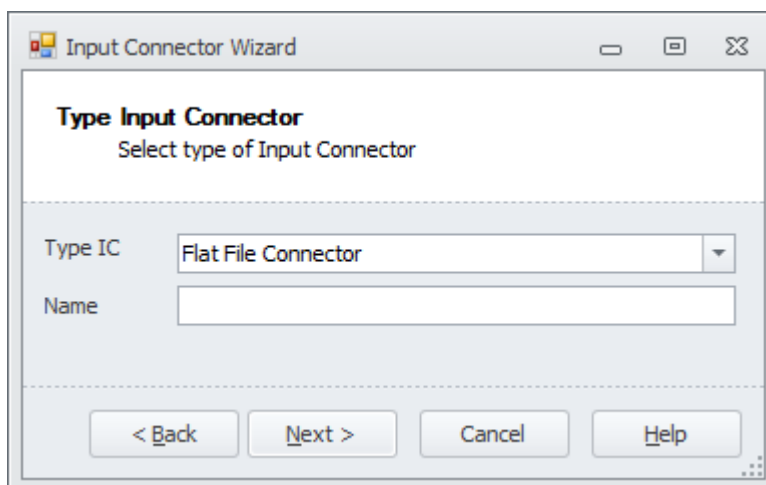
Click on the button **Next** to go to the next screen:



Click on the button **Finish** to close the wizard.

3.2.7 Configuration of an IC Flat File Connector

The Type Input Connector selection screen appears:



Type IC Select "Flat File Connector".
Name Enter a name for your input connector.

Click on the button **Next** to go to the next screen:

Base path	Location of the files that need to be uploaded. Click on the browse button [...] next to the field to select the location.
Backup path	Backup folder. Click on the browse button [...] next to the field to select the location.
Template file	Template file. Click on the open button [...] next to the field to select the file.
Delimiters	Define delimiter (separator between columns)
First row contains column names	If checked, first row is ignored because it contains header info.
Extension	File extension of files to be uploaded.
Multi field separator	String to be replaced by Carriage Return Line Feed
Text qualifier	Text qualifier: none, double quotes or single quotes.

e.g.

Flat File Connector
Enter settings for this input connector (1/2)

Base path: D:\Data\Doma\Drum\FLAT FILE UPLOAD\Input

Backup path: D:\Data\Doma\Drum\FLAT FILE UPLOAD\Backup

Template file: D:\Data\Doma\Drum\XML_TEMPLATES\DemoFlatFileTemplate.csv

Delimiters

☐ Tab
☒ Semicolon
☐ Comma
☐ Space
☐ Other

☒ First row contains column names

Extension: CSV

Multi field separator: [CRLF]

Text qualifier: [Dropdown]

< Back Next > Cancel Help

Click on the button **Next** to go to the next screen:

Flat File Connector
Enter settings for this input connector (2/2)

	id	title	author	file
▶	1	Test van Kathleen	Kathleen	d:\test1.txt
	2	Test2 van Kathl...	Christophe	d:\test2.txt
	3	Test3 van Kathl...	Walter	d:\test3.txt
	4	Test4 van Kathl...	Stefan	d:\test4.txt
	5	Test5 van Kathl...	An	d:\test5.txt

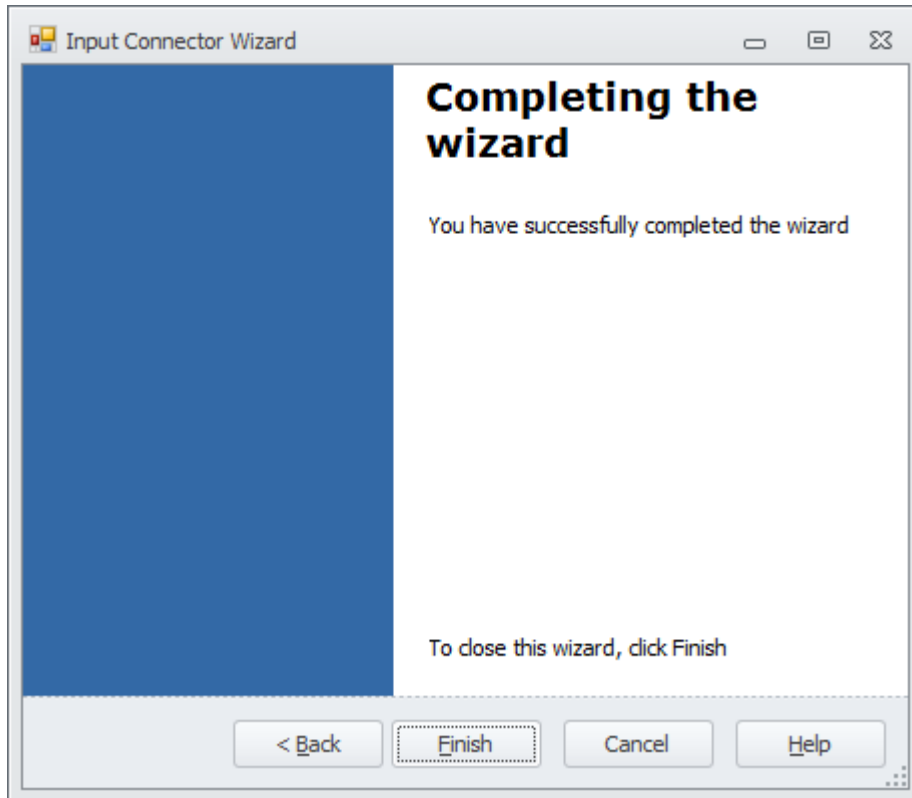
< Back Next > Cancel Help

A preview of the data is shown as test of your configuration.

Click on the button **Next** to go to the next screen:

Please perform the steps defined in chapter 3.2.9

Click on the button **Next** to go to the next screen:



Click on the button **Finish** to close the wizard.

3.2.8 Configuration of an IC Custom Connector

The Type Input Connector selection screen appears:

Type IC	Select "Custom Connector".
Name	Enter a name for your input connector.
Assembly name	Select assembly name
Class name	Select class name

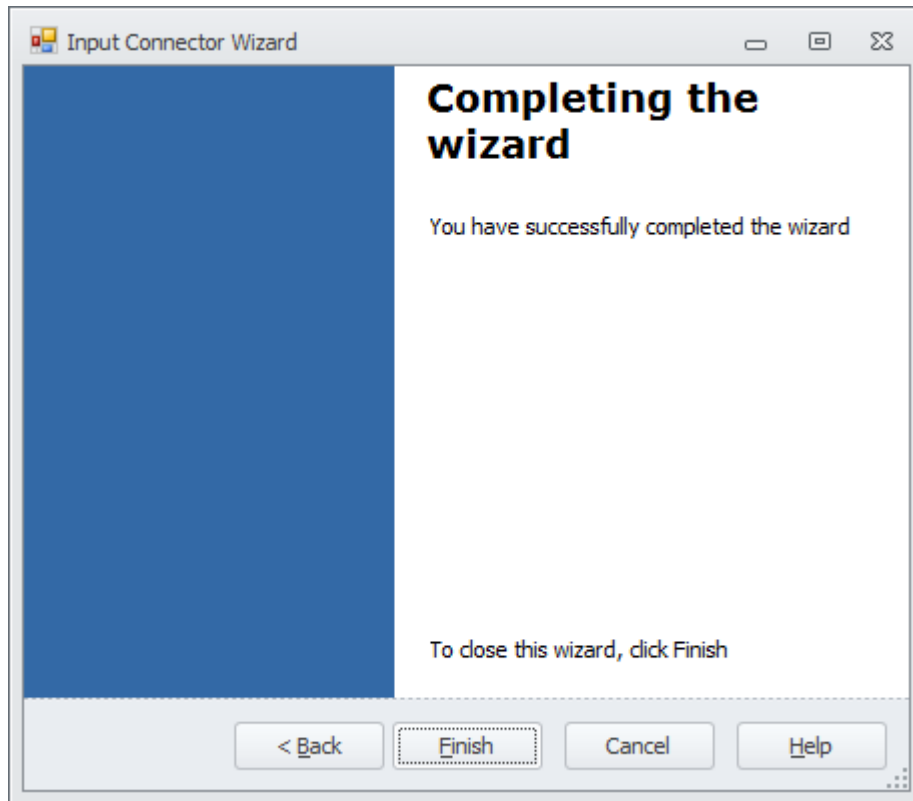
Click on the button **Next** to go to the next screen:

A property window is shown. Make your changes.

Click on the button **Next** to go to the next screen:

Please perform the steps defined in chapter 3.2.9

Click on the button **Next** to go to the next screen:



Click on the button **Finish** to close the wizard.

3.2.9 Add scenarios and batch job

Create Folder scenario

- ☒ The system will create a Folder scenario. This scenario defines how the data imported by the IC connector will be processed to create a DocRoom Folder with meta data.
- ☐ Do not create folders with meta data.

Create Dossier scenario

- ☒ The system will create a Dossier scenario. This scenario defines how the data imported by the IC connector will be processed to create a DocRoom Dossier with meta data.
- ☐ Do not create dossiers with meta data.

Create Document/Mail scenario

- ☒ The system will create a Document/Mail scenario. This scenario defines how the data imported by the IC connector will be processed to create/update DocRoom documents.
- ☐ Do not create DocRoom documents/mails.

Create Workflow scenario

- ☒ The system will create a Workflow scenario. This scenario defines how the data imported by the IC connector will be processed to create/update Workflows.
- ☐ Do not create Workflows.

Create batch job

- ☒ A batch job is created for the created IC connector and its scenario(s) to allow automatic upload.
- ☐ No batch job is created. The upload can only be done manually.

Batch job configuration

When the option *Create batch job* is selected, the batch job configuration window below is enabled.

Name	Name of the batch job. Please enter a unique name.
Server	Optional. Server on which the batch job is active.
Interval - Minutes	Interval expressed in minutes, enter the number of minutes in the field at the right.
Interval - Daily	Batch job is executed every day at the moment defined in the field at

the right.

Interval - Weekly


Batch job is executed every week on the day of the week and at the moment defined in the field at the right.

Interval - Monthly

Batch job is executed every month on the day and at the moment defined in the field at the right.

Click on the button **Next** to go to the next screen:

When the option create batch job was selected, the Batch job settings window appears. If no batch job is to be created, this screen will not be shown.

Screen notation	Description
<input checked="" type="checkbox"/> Log	<input checked="" type="checkbox"/> = 1 = Logging is enabled <input type="checkbox"/> = 0 = Logging is disabled
<input checked="" type="checkbox"/> Full log	<input checked="" type="checkbox"/> = 1 = Complete logging is enabled. (Also exceptions are logged, this kind of log contains more debug info than the standard logging) <input type="checkbox"/> = 0 = Only standard logging is active if option Log is selected.
Log File	Directory+file name of the log file. Click on the <i>browse</i> button  to select this file.
Maximum count	Maximum number of items that can be processed in one run of the batch job.
<input checked="" type="checkbox"/> Stop batch job on error	

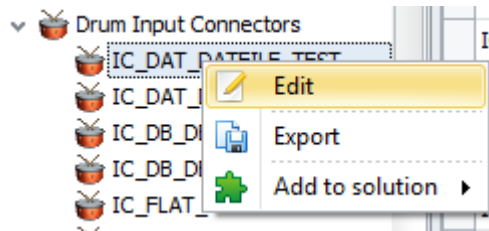
Click on the button **Next** to go to the next screen.

3.3 How to edit an input connector

How to edit an input connector in the Arco Doma Admin module.

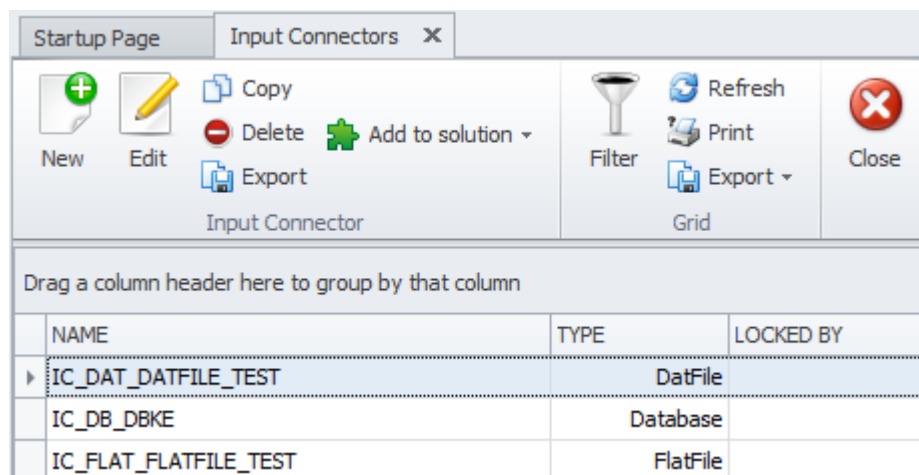
Disable all batch jobs connected to the Input Connector before continuing.

- Start the Doma admin module.
- Open the item **“Configuration”** in the navigation tree.
- Expand the item **“Drum Input Connectors”** of the navigation tree.
- Put the cursor on one of the Drum Input Connectors items.



- Click on the right mouse button - a context menu appears.
- Select the option **“Edit”**.

Or open the list of Drum Input Connectors (“Open” in context menu on “Drum Input Connectors” item)



A tab with an overview of all existing input connectors now appears. Click on the “Edit” icon in the toolbar or click on the “Edit” icon in the context menu of the grid or press the keys [CTRL] + [O]

- The configuration tab appears.
- Make your changes and click on the Save icon in the toolbar.

3.3.1 Edit IC Database Connector

Disable linked batch jobs before making changes.

This screen consists of 5 vertical tabs.

3.3.1.1 Tab DB Connector

Input field	IC Parameter	Description
DSN (*)	DSN	Data source name (ODBC)
User ID (*)	UID	Database User name (optional)
Password (*)	PWD	Database Password (optional)
Database (*)	DBQ	Database (optional)
Connection String	CONNSTRING	Database Connection String
Connection Type	TYPE	Database Connection Type. Choose between ODBC, SQLSERVER, ORACLE, OLEDB and MSORACLE.
Tablename	TABLERNAME	Select one of the tables in the combo box. (Combobox is populated when pressing "Test connection" button)
Filter	FILTER	Where clause of SQL statement. Optional.
Order by	ORDERBY	Order by clause of SQL statement. Optional.
Primary Key	PK	A field which contains unique values. Select one of the fields in the combo box. (Combobox is populated when pressing "Test connection" button)

Status	STATUS	A field which will hold the status of the upload. Select one of the fields in the combo box. (Combobox is populated when pressing "Test connection" button)
To be processed	STATUSTBP	Enter value to mark the record as "To be processed", please be aware of the data type of the field (length, type).
In progress	STATUSIP	Enter value to mark the record as "In progress", please be aware of the data type of the field (length, type).
Feedback Success	STATUSDIN STATUSTECHID	Action to be performed when record has been processed successfully. <ul style="list-style-type: none"> - Nothing: Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Status or Delete instead. - Status (preferable): Update status (enter status field, please use another value than defined in previous screen). Optional it's possible to fill in DIN and TechID. - Delete: Deletes the record.
Feedback Failed	ERRCODE ERRDESC	Action to be performed when record has not been processed in case of errors. <ul style="list-style-type: none"> - Nothing: Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Status instead. - Status (preferable): Update status (enter status field, please use another value than defined in previous screen). Optional it's possible to fill in Error code and description.

(*) *Obsolete. Entering these fields will trigger the use of ArcoGenLib. It's preferable to fill in Connection String and Connection Type which uses the Arco Framework to do the database operations.*

Each time you change the columns of the table, you have to edit this Input Connector and recreate the IC Properties. After recreate, check each IC Property for its data type.

You can test the configuration after you finished all tabs; press the "Test" button in the ribbon. Please be aware that the test will actually upload data to Doma. You can limit the upload by setting the maximum items to be processed. See chapter DRUM settings. It's preferable to test with a small number of items.

3.3.1.2 Other tabs

IC Properties IC Properties are automatically created when creating a new Input Connector. For each column in the database table, an IC Property is created with the same name as the column.

e.g.

IC Properties:

Table:

```
CREATE TABLE drum_upload (
  id      NUMBER      NOT NULL,
  title   VARCHAR2(100) NULL,
  treeid  VARCHAR2(200) NULL,
  status  VARCHAR2(1)  NULL,
  errcode VARCHAR2(50) NULL,
```

NAME	TYPE
DIN	NUMBER
ERRCODE	STRING
ERRMSG	STRING
FILENAME	STRING
FILEPATH	STRING
ID	NUMBER
STATUS	STRING
TECHID	NUMBER
TITLE	STRING
TREEID	STRING

```
errmsg VARCHAR2(100) NULL,
filepath VARCHAR2(200) NULL,
filename VARCHAR2(50) NULL,
din NUMBER NULL,
techid NUMBER NULL
)
```

IC Settings
Scenarios
Bath jobs

See chapter Tab IC Properties for more information about editing and recreating IC Properties.
See chapter Tab IC Settings.
See chapter Tab Scenarios.
See chapter Tab Batch jobs.

3.3.2 Edit IC Dat File Connector

Disable linked batch jobs before making changes.

Save

Save & Close

Delete

Create

Edit

Save

Test

Close

IC ConfigurationIC PropertiesInput Stream

Data Files Connector

IC Properties

IC Settings

Scenarios

Batch jobs

Data Files Connector

Base path

D:\Data\Doma\Drum\DAT FILE UPLOAD\INPUT

Backup processed files

Backup path

D:\Data\Doma\Drum\DAT FILE UPLOAD\BACKUP

Error path

D:\Data\Doma\Drum\DAT FILE UPLOAD\ERROR

Template file

D:\Data\Doma\Drum\XML_TEMPLATES\DemoDatFileTemplate.dat

Extension

dat

Separator

<->

Multi field separator

[CRLF]

Feedback Success

Nothing

Move dat file to folder

D:\Data\Doma\Drum\DAT FILE UPLOAD\SUCCESS

Delete dat file

Feedback Failed







Nothing

Move dat file to folder

D:\Data\Doma\Drum\DAT FILE UPLOAD\FAILED

This screen consists of 5 vertical tabs.

3.3.2.1 Tab Data Files Connector

Input field	IC Parameter	Description
Base path	BASEPATH	Input folder. Click on the browse button  next to the field to select the location
Backup processed files	BACKUPPROCESSEDFILE	Set this to true if you want to back up the files
Backup path	BACKUPPATH	Backup folder (Backup processed files = True). Click on the browse button  next to the field to select the location.
Error path	ERRORPATH	Error folder. Click on the browse button  next to the field to select the location.
Template file	TEMPLATEFILE	Template file. Click on the open button  next to the field to select the file.
Extension	EXTENSION	File extension (only one file extension allowed)
Separator	SEPARATOR	Separator between field and value
Multi field separator	MULTIFIELDSEPARATOR	String to be replaced by Carriage Return Line Feed
Feedback Success		<p>Action to be performed when DAT file has been processed successfully.</p> <ul style="list-style-type: none"> - Nothing: Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Move or Delete instead. - Move dat file to folder (preferable): Move DAT file to another folder. Click on the browse button  next to the field to select the location. - Delete dat file: Deletes the DAT file.
Feedback Failed		<p>Action to be performed when DAT file has not been processed in case of errors.</p> <ul style="list-style-type: none"> - Nothing: Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Move instead. - Move dat file to folder (preferable): Move dat file to another folder. Click on the browse button  next to the field to select the location.

Each time you change the (content of the) template file, you have to edit this Input Connector and recreate the IC Properties. After recreate, check each IC Property for its data type.

You can test the configuration after you finished all tabs; press the “Test” button in the ribbon. Please be aware that the test will actually upload data to Doma. You can limit the upload by setting the maximum items to be processed. See chapter DRUM settings. It’s preferable to test with a small number of items.

3.3.2.2 Other tabs

IC Properties IC Properties are automatically created when creating a new Input Connector. For each field in the DAT file, an IC Property is created with the same name as the field.

e.g.

IC Properties:

NAME	TYPE
FILE	STRING
ID	STRING
NAME	STRING
PROP1	STRING
PROP2	STRING
TYPE	STRING

Content of template file:

ID<->1222
NAME<->Demo
TYPE<->Document
PROP1<->Property 1 value[CRLF]2nd line
PROP2<->Property 2 value
FILE<->Demo1.docx

See chapter Tab IC Properties for more information about editing and recreating IC Properties.

IC Settings

See chapter Tab IC Settings.

Scenarios

See chapter Tab Scenarios.

Batch jobs




See chapter Tab Batch jobs.

3.3.3 Edit IC File Upload Connector

Disable linked batch jobs before making changes.

This screen consists of 5 vertical tabs.

3.3.3.1 Tab File Upload

Input field	IC Parameter	Description
Folder	FOLDER	Location of the files that need to be uploaded. Click on the browse button  next to the field to select the location.
Subfolders	SUBFOLDERS	If checked, subfolders are also processed
File extensions	EXTENSIONS	Only files, of which the extension is mentioned in this field, are processed. A user can enter multiple extensions, separated with a space. When you leave this field empty, all files will be uploaded.
Allow unknown file extensions	UNKNOWNFILETYPES	This checkbox is only enabled when no values are added in the field File extensions. If the field File extensions is left empty and the option “ <i>Allow unknown file extensions</i> ” is selected, files with unknown file extensions (i.e. file extensions not defined in Doma) will not be skipped.
Feedback Success		Action to be performed when file has been processed successfully. <ul style="list-style-type: none"> - Nothing: Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Move or Delete instead. - Move file to folder (preferable): Move file to another folder. Click on the browse button  next to the field to select the location. - Delete file: Deletes the file.
Feedback Failed		Action to be performed when file has not been processed in case of errors. <ul style="list-style-type: none"> - Nothing: Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Move instead. - Move file to folder (preferable): Move file to another folder. Click on the browse button  next to the field to select the location.

You can test the configuration after you finished all tabs; press the “Test” button in the ribbon. Please be aware that the test will actually upload data to Doma. You can limit the upload by setting the maximum items to be processed. See chapter DRUM settings. It’s preferable to test with a small number of items.

3.3.3.2 Other tabs

IC Properties IC Properties are automatically created when creating a new Input Connector. A fixed number of IC Properties are automatically created.
e.g.
IC Properties:

NAME	TYPE
AUTHOR	STRING
CATEGORY	STRING
COMMENTS	STRING
FILE	STRING
FILENAME	STRING
KEYWORDS	STRING
PATH	STRING
SUBJECT	STRING
TITLE	STRING

See chapter Tab IC Properties for more information about editing and recreating IC Properties.

IC Settings
Scenarios
Bath jobs

See chapter Tab IC Settings.

See chapter Tab Scenarios.

See chapter Tab Batch jobs.

3.3.4 Edit IC Mail Connector

3.3.4.1 POP3

Disable linked batch jobs before making changes.

The screenshot displays the 'Edit IC Mail Connector' window in the Arco application. The window features a top toolbar with icons for Save, Save & Close, Delete, Create, Edit, Save, Test, and Close. Below the toolbar is a vertical tab bar on the left with tabs for Mail Connector, IC Properties, IC Settings, Scenarios, and Batch jobs. The main area shows the 'Mail Connector' configuration for a POP3 connector. It includes fields for Mailbox (ARCOBE00;Kathleen.van.de.weye), Root folder, Folders, Filter To, Filter From, and Filter Subject. There is a checkbox for 'Save msg file' and a table for 'RegExp Name' and 'RegExp'. Below the table are sections for 'Feedback Success' and 'Feedback Failed', each with radio button options: Nothing, Delete mail object, Move to folder, and Update subject.

This screen consists of 5 vertical tabs.

3.3.4.2 Tab Mail Connector

Input field	IC Parameter	Description
Mailbox	MAILBOX	Mandatory. POP3 settings consisting of 3 parts separated by a semicolon: Server;User name; Password <ul style="list-style-type: none"> - Server: Mail server name - User name: POP3 account: user name - Password: POP3 account: password
Filter To	FILTERTO	Optional. Filter on mail item's "To" field. "IndexOf" method is used to perform "Contains".
Filter From	FILTERFROM	Optional. Filter on mail item's "SenderName" field. "IndexOf" method is used to perform "Contains".
Filter Subject	FILTERSUBJECT	Optional. Filter on mail item's "Subject" field. "IndexOf" method is used to perform "Contains".
Regular expressions	REGEXP[seq] REGEXPCNT	Optional. Define IC Properties based on mail item's "Subject" field. Regular expression is used. <pre>If Regex.IsMatch(vsSubject, loMailRegEx.RegularExpression, RegexOptions.IgnoreCase) = True Then Dim loMatch As Match = Regex.Match(vsSubject, loMailRegEx.RegularExpression, RegexOptions.IgnoreCase) lsValue = loMatch.Value If loMatch.Groups.Count > 1 Then lsValue = loMatch.Groups(1).Value End If End If</pre>
Feedback Success		Action to be performed when e-mail item has been processed successfully. <ul style="list-style-type: none"> - Nothing: Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Delete instead. - Delete mail object (preferable): Deletes the e-mail item.
Feedback Failed		Action to be performed when e-mail item has not been processed in case of errors. <ul style="list-style-type: none"> - Nothing: Perform nothing.

Each time you want to change the Regular expressions, you have to edit this Input Connector and recreate the IC Properties. After recreate, check each IC Property for its data type.

You can test the configuration after you finished all tabs; press the "Test" button in the ribbon. Please be aware that the test will actually upload data to Doma. You can limit the upload by setting the maximum items to be processed. See chapter DRUM settings. It's preferable to test with a small number of items.

3.3.4.3 Other tabs

IC Properties IC Properties are automatically created when creating a new Input Connector. There are a fixed number of IC Properties and supplementary there are IC Properties made of the Regular expressions.
e.g.

IC Properties: This is the list of the fixed IC Properties.
Note: MSGFILE and MSGFILENAME are

NAME	TYPE
ATTFILENAMES	STRING
ATTFILES	STRING
BCC	STRING
BODY	STRING
BODYHTML	STRING
CC	STRING
DATE	STRING
ENTRYID	STRING
FOLDER	STRING
FROM	STRING
MSGFILE	STRING
MSGFILENAME	STRING
SUBJECT	STRING
TO	STRING

always empty, because these fields are only used in Outlook connector.

IC Settings
Scenarios
Bath jobs

See chapter Tab IC Properties for more information about editing and recreating IC Properties.
See chapter Tab IC Settings.
See chapter Tab Scenarios.
See chapter Tab Batch jobs.

3.3.4.4 Outlook

Disable linked batch jobs before making changes.

This screen consists of 5 vertical tabs.

3.3.4.5 Tab Mail Connector

Input field	IC Parameter	Description
Root folder	ROOTFOLDER	Mandatory. Name of the root folder.
Folders	FOLDERS	Mandatory. Complete path of the folder. You can define more than one folder, use “,” as separator.
Filter To	FILTERTO	Optional. Filter on mail item’s “To” field. “IndexOf” method is used to perform “Contains”.
Filter From	FILTERFROM	Optional. Filter on mail item’s “SenderName” field. “IndexOf” method is used to perform “Contains”.
Filter Subject	FILTERSUBJECT	Optional. Filter on mail item’s “Subject” field. “IndexOf” method is used to perform “Contains”.
Save msg file	SAVEMSG	Save mail item in msg format. Use this if you want to upload msg files.
Regular expressions	REGEXP[seq] REGEXPCNT	Optional. Define IC Properties based on mail item’s “Subject” field. Regular expression is used. <pre> If Regex.IsMatch(vsSubject, loMailRegex.RegularExpression, RegexOptions.IgnoreCase) = True Then Dim loMatch As Match = Regex.Match(vsSubject, loMailRegex.RegularExpression, RegexOptions.IgnoreCase) lsValue = loMatch.Value If loMatch.Groups.Count > 1 Then lsValue = loMatch.Groups(1).Value End If End If </pre>
Feedback Success		Action to be performed when e-mail item has been processed successfully. <ul style="list-style-type: none"> - Nothing: Perform nothing; this can be chosen if you choose to run the upload only once. - Move to folder (preferable): Move e-mail item to another outlook folder. If you choose this option, an extra field is displayed to enter the folder. - Delete mail object: Deletes the e-mail item. - Update subject: Renames the subject. If you choose this option, an extra field is displayed to enter the new subject.
Feedback Failed		Action to be performed when e-mail item has not been processed in case of errors. <ul style="list-style-type: none"> - Nothing: Perform nothing; this can be chosen if you choose to run the upload only once. - Move to folder (preferable): Move e-mail item to another outlook folder. If you choose this option, an extra field is displayed to enter the folder. - Update subject: Renames the subject. If you choose this option, an extra field is displayed to enter the new subject.

Each time you want to change the Regular expressions, you have to edit this Input Connector and recreate the IC Properties. After recreate, check each IC Property for its data type.

You can test the configuration after you finished all tabs; press the “Test” button in the ribbon. Please be aware that the test will actually upload data to Doma. You can limit the upload by setting the maximum items to be processed. See chapter DRUM settings. It’s preferable to test with a small number of items.

3.3.4.6 Other tabs

IC Properties IC Properties are automatically created when creating a new Input Connector. There are a fixed number of IC Properties and supplementary there are IC Properties made of the Regular expressions.

e.g.

IC Properties:

This is the list of the fixed IC Properties

NAME	TYPE
ATTFILENAMES	STRING
ATTFILES	STRING
BCC	STRING
BODY	STRING
BODYHTML	STRING
CC	STRING
DATE	STRING
ENTRYID	STRING
FOLDER	STRING
FROM	STRING
MSGFILE	STRING
MSGFILENAME	STRING
SUBJECT	STRING
TO	STRING

See chapter Tab IC Properties for more information about editing and recreating IC Properties.

IC Settings

See chapter Tab IC Settings.

Scenarios

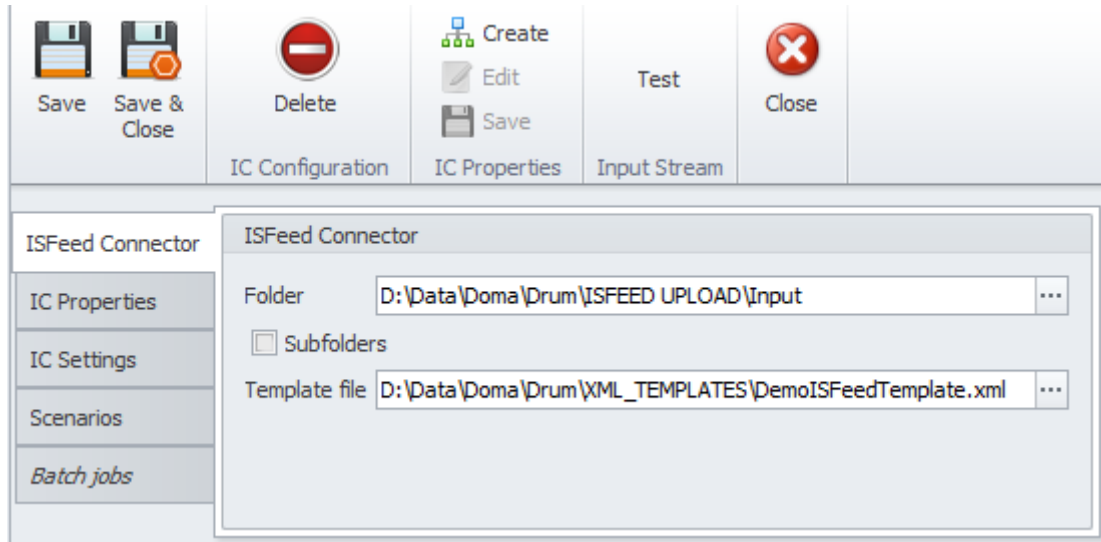
See chapter Tab Scenarios.

Batch jobs

See chapter Tab Batch jobs.

3.3.5 Edit IC ISFeed Connector

Disable linked batch jobs before making changes.



This screen consists of 5 vertical tabs.

3.3.5.1 Tab ISFeed Connector

Input field	IC Parameter	Description
Folder	FOLDER	Location of the files that need to be uploaded. Click on the browse button [...] next to the field to select the location.
Subfolders	SUBFOLDERS	If checked, subfolders are also processed.
Template file	TEMPLATEFILE	Template file. Click on the open button [...] next to the field to select the file.

Each time you want to change the content of the template file, you have to edit this Input Connector and recreate the IC Properties. After recreate, check each IC Property for its data type.

You can test the configuration after you finished all tabs; press the “Test” button in the ribbon. Please be aware that the test will actually upload data to Doma. You can limit the upload by setting the maximum items to be processed. See chapter DRUM settings. It's preferable to test with a small number of items.

3.3.5.2 Other tabs

IC Properties IC Properties are automatically created when creating a new Input Connector. The IC Properties are fetched from the template file. Node selection = **XML/ISFEED/ISPROPERTIES/ISPROPERTY**

e.g.

IC Properties:

Note. The list is depending of the content of the template file.

NAME	TYPE
BCC	STRING
BODY	STRING
BODYHTML	STRING
CC	STRING
DATE	STRING
ENTRYID	STRING
FOLDER	STRING
FOLDERID_NOK	STRING
FOLDERID_OK	STRING
FROM	STRING
MSGFILE	STRING
MSGFILENAME	STRING
SUBJECT	STRING
TO	STRING

See chapter Tab IC Properties for more information about editing and recreating IC Properties.

IC Settings

See chapter Tab IC Settings.

Scenarios

See chapter Tab Scenarios.

Batch jobs





See chapter Tab Batch jobs.

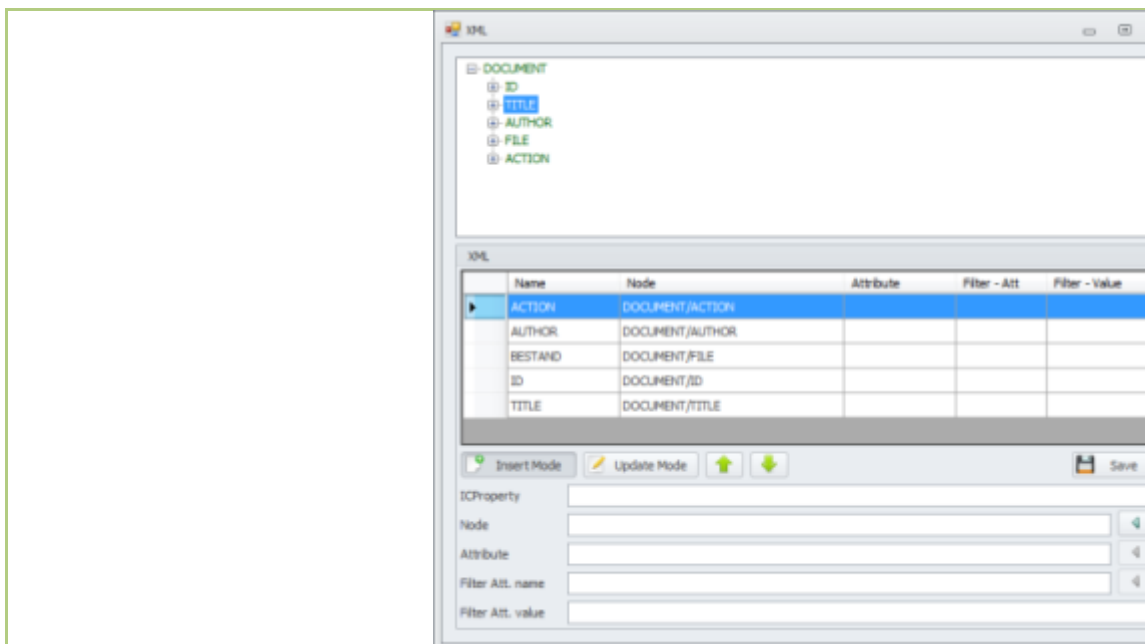
3.3.6 Edit IC XML File Connector

Disable linked batch jobs before making changes.

This screen consists of 5 vertical tabs.

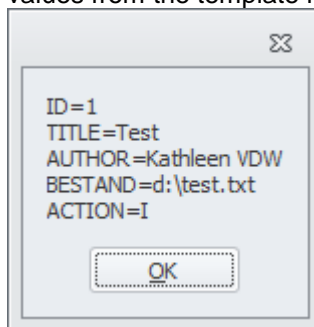
3.3.6.1 Tab XML Connector

Input field	IC Parameter	Description
Folder	FOLDER	Location of the files that need to be uploaded. Click on the browse button  next to the field to select the location.
Subfolders	SUBFOLDERS	If checked, subfolders are also processed
File extensions	EXTENSIONS	Only files, of which the extension is mentioned in this field, are processed. A user can enter multiple extensions, separated with a space.
Template file	TEMPLATEFILE	Template file. Click on the open button  next to the field to select the file.
Transform file	TRANSFORMFILE	Transform file. Click on the open button  next to the field to select the file.
ICProperties	XML[seq] XMLCNT	Click on the open button  beneath the grid to enter the ICProperties.




The treeview is filled with your data from the template file. Select the node or attribute to add this to the grid. Click on the Left Arrow button to add this selection. Enter ICProperty name and press Save button. If you have nodes with the same name, you have to use the filter attribute and filter value. Repeat until all ICProperties are defined. Prohibited names: FILE, FILENAME and PATH. Close this screen.

Click the "Test" button when you are finished with adding the nodes to the grid. A message box is displayed with the values from the template file.



Feedback Success


Action to be performed when XML file has been processed successfully.

- **Nothing:** Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Move or Delete instead.
- **Move xml file to folder** (preferable): Move XML file to another folder. Click on the **browse** button  next to the field to select the location.
- **Delete xml file:** Deletes the XML file.

Feedback Failed

Action to be performed when XML file has not been processed in case of errors.

- **Nothing:** Perform nothing; this can be chosen if you choose to run the upload only once. When executing the upload on a regular basis (i.e. batch job), use Move instead.
- **Move xml file to folder** (preferable): Move XML

file to another folder. Click on the **browse** button
 next to the field to select the location.

Each time you want to change the content of the template file, you have to edit this Input Connector and recreate the IC Properties. After recreate, check each IC Property for its data type.

You can test the configuration after you finished all tabs; press the “Test” button in the ribbon. Please be aware that the test will actually upload data to Doma. You can limit the upload by setting the maximum items to be processed. See chapter DRUM settings. It's preferable to test with a small number of items.

3.3.6.2 Other tabs

IC Properties IC Properties are automatically created when creating a new Input Connector. There are a fixed number of IC Properties and supplementary there are IC Properties extracted from your list of IC Properties in 1st tab.

e.g.

IC Properties:

NAME	TYPE
ACTION	STRING
AUTHOR	STRING
BESTAND	STRING
FILE	STRING
FILENAME	STRING
ID	STRING
PATH	STRING
TITLE	STRING

Fixed IC Properties:

- PATH
- FILENAME
- FILE

See chapter Tab IC Properties for more information about editing and recreating IC Properties.

IC Settings

See chapter Tab IC Settings.

Scenarios

See chapter Tab Scenarios.

Batch jobs

See chapter Tab Batch jobs.




3.3.7 Edit IC Flat File Connector

Disable linked batch jobs before making changes.

	id	title	author	file
1	Test van Kathleen	Kathleen	d:\test1.txt	
2	Test2 van Kathl...	Christophe	d:\test2.txt	
3	Test3 van Kathl...	Walter	d:\test3.txt	
4	Test4 van Kathl...	Stefan	d:\test4.txt	
5	Test5 van Kathl...	An	d:\test5.txt	

This screen consists of 5 vertical tabs.

3.3.7.1 Tab Flat File Connector

Input field	IC Parameter	Description
Basepath	BASEPATH	Location of the files that need to be uploaded. Click on the browse button  next to the field to select the location.
Backup path	BACKUPPATH	Backup folder. Click on the browse button  next to the field to select the location.
Template file	TEMPLATEFILE	Template file. Click on the open button  next to the field to select the file.
Delimiters	SEPARATOR	Define delimiter (separator between columns)
First row contains column names	FIRSTROWCOLS	If checked, first row is ignored because it contains header info. It's preferable to use header info; this info is used to determine the name of the ICProperty.
Extension	EXTENSION	File extension of files to be uploaded.
Multi field separator	MULTIFIELDSEPARATOR	String to be replaced by Carriage Return Line Feed
Text qualifier	TEXTQUALIFIER	Text qualifier: none, double quotes or single quotes.
Data preview		Result of the settings using the data from the template file.

Each time you want to change the content of the template file, you have to edit this Input Connector and recreate the IC Properties. After recreate, check each IC Property for its data type.

You can test the configuration after you finished all tabs; press the “Test” button in the ribbon. Please be aware that the test will actually upload data to Doma. You can limit the upload by setting the maximum items to be processed. See chapter DRUM settings. It's preferable to test with a small number of items.

3.3.7.2 Other tabs

IC Properties IC Properties are automatically created when creating a new Input Connector. There are a fixed number of IC Properties and supplementary there are IC Properties extracted from your template file.

e.g.

IC Properties:

NAME	TYPE
FLATFILE_FILE	STRING
FLATFILE_FILENAME	STRING
FLATFILE_PATH	STRING
FLATFILE_ROW	STRING
author	STRING
file	STRING
id	STRING
title	STRING

Fixed IC Properties:

- FLATFILE_PATH
- FLATFILE_FILENAME
- FLATFILE_FILE
- FLATFILE_ROW

See chapter Tab IC Properties for more information about editing and recreating IC Properties.

IC Settings

See chapter Tab IC Settings.

Scenarios

See chapter Tab Scenarios.

Batch jobs

See chapter Tab Batch jobs.

3.3.8 Edit IC Custom Connector

Disable linked batch jobs before making changes.

In this screen you can enter the assembly name and class name.
A property window is shown. Make your changes.

3.3.9 Tab IC Properties

Disable linked batch jobs before making changes.

For each type of Input Connector, you can recreate or modify the IC Properties.
An IC Property contains data from the input source.

NAME	TYPE
DIN	NUMBER
ERRCODE	STRING
ERRMSG	STRING
FILENAME	STRING
FILEPATH	STRING
ID	NUMBER
STATUS	STRING
TECHID	NUMBER
TITLE	STRING

IC Property	
Name	DIN
Type	NUMBER
Prefix	
Date format	
Decimal symbol	
Digit grouper	
Replace	

Field	Description
Ribbon bar	<div> Create Edit Save </div> <p>Recreate IC Properties. Press this button when you input source has been changed. Check type of each IC Property. Select one of the IC Properties and press Edit button. Make some changes.</p> <p>After making some changes, press Save button.</p>
Grid	List of all IC Properties.
Name	Name of the IC Property. Read-only.
Type	Data type. STRING, DATE, NUMBER, DECIMAL or BLOB.
Prefix	Only available for STRING data type. Text to be placed in front of the IC Property value. e.g. folder path
Date format	Only available for DATE data type. yyyy = year yy = year (short format) MM = month dd= day hh = hour nn : minutes

	ss : seconds e.g. yyyy-MM-dd e.g. dd-MM-yyyy hh:nn:ss
Decimal symbol	Only available for DECIMAL data type. “.” Or “,”
Digit grouper	Only available for NUMBER and DECIMAL data type. Character to be ignored by Drum. e.g. “20.000” will be processed as “20000”.
Replace into	Only available for STRING data type. Result of the settings using the data from the template file.

3.3.10 Tab IC Settings

Disable linked batch jobs before making changes.

For each type of Input Connector, you can define the subfolders for storing the XML files. The XML files contain data to be processed by Drum.

Field	Description
ISFeed Path (*)	Folder for storing XML files which contain input data and feedback data.
Drum In (*)	Folder for storing XML files which contain input data merged with the scenario settings. Folder contains files to be processed.
Drum Out (*)	Folder for storing XML files which contain input data merged with the scenario settings. Folder contains processed files.
Drum Error (*)	Folder for storing XML files which contain input data merged with the scenario settings. Folder contains files which data cannot be processed.
Delete file(s)	<ul style="list-style-type: none"> - True: Delete original files (IS tab Files) after upload. - False: Original files are not removed.
Delete temporary XML files	<ul style="list-style-type: none"> - True: Automatically delete temporary XML files when upload succeeded. - False: Don't delete temporary XML files

(*) All these folders contains a base folder, this is retrieved from the Drum Settings .Do not change this base folder in this screen, but make changes to the Drum Settings if you want another base folder.

3.3.11 Tab Scenarios




Disable linked batch jobs before making changes.

For each type of Input Connector, you can create or modify scenarios.

There are 4 types of scenarios:

- Folder : create/update folder and its meta data (properties)
- Dossier : create/update dossier at its meta data (folder and properties)
- Document/Mail : create/update document and its meta data (folder, properties, files, templates, mail attachments and dossiers)
- Workflow : create/update workflow and its meta data (package, folder, properties, files and dossiers)

You must define at least one scenario. More scenarios are possible.

Field	Description
Ribbon bar	<div>  Create new scenario. You can choose between Folder, Dossier, Document/Mail and Workflow. A new screen opens with no data filled in. For a detailed description, see Chapter 4. </div> <div>  Select one of the scenarios and press Edit button. A new screen opens with the details filled in. For a detailed description, see Chapter 4. </div> <div>  Select one of the scenarios and press Delete button. A message box pops up with a warning: "Are you sure you want to delete this Scenario?" Yes: Delete scenario No: Cancel </div>
Grid	List of all scenarios.

3.3.12 Tab Batch jobs

Disable linked batch jobs before making changes.






For each type of Input Connector, you can create a linked batch job. Do not activate a batch job, until you did some successful Drum Tests in DomaAdmin.






Save	Save & Close	Create	Edit	Save	New	Edit	Delete	Open	Test	Close
		IC Properties			Batch jobs			Input Stream		


DB Connector	Drag a column header here to group by that column					
IC Properties	JOB NAME	LAST ERROR	INTERVAL	LOG FILE	MAX COUNT	STOP CRITICAL
IC Settings	dbke		Every day at 10:00 (DT10:00)		10	<input checked="" type="checkbox"/>
Scenarios						
Batch jobs						

Field	Description
Ribbon bar	<div> New Create new batch job. A new screen is displayed where you can enter a name; define an interval and set log file and maximum number of items to be processed. </div> <div> Edit Edit an existing batch job. Select one of the batch jobs in the grid and press this button. A new screen is displayed with all details of this batch job. </div> <div> Delete Delete an existing batch job. Select one of the batch jobs in the grid and press this button. A message box pops up with a warning: "Are you sure you want to delete this Batch job?" Yes: Delete batch job No: Cancel </div> <div> Open Opens the screen with all batch jobs, also non-Drum batch jobs. Description of this screen is not in the scope of this document. </div>
Grid	List of all batch jobs. In most of the cases, there's only one batch job.

Batch job screen

				
Save	Save & Close	New	Delete	Close
Batch job				
Name	<input type="text" value="dbke"/>			
Server	<input type="text"/>			
Interval	<input type="radio"/> Minutes <input type="text" value="60"/>			
	<input checked="" type="radio"/> Daily at <input type="text" value="10:00"/>			
	<input type="radio"/> Weekly <input type="text" value="Friday"/> at <input type="text" value="00:00"/>			
	<input type="radio"/> Monthly <input type="text" value="15"/> at <input type="text" value="00:00"/>			
<input checked="" type="checkbox"/> Log <input checked="" type="checkbox"/> Full log				
Log file	<input type="text"/> ...			
Maximum count	<input type="text" value="10"/>			
<input checked="" type="checkbox"/> Stop batch job on error				

Field	Description
Ribbon bar	<div>  Save Save entered data. </div> <div>  Save & Close Save entered data and close this screen. </div> <div>  New Create new batch job. Current screen initializes with default values. </div> <div>  Delete Delete batch job. A message box pops up with a warning: "Are you sure you want to delete this Batch job?" Yes: Delete batch job No: Cancel </div> <div>  Close Close this screen. </div>
Name	Name of the batch job. Please enter a unique name.
Server	Optional. Server on which the batch job is active.
Interval	Choose between <ul style="list-style-type: none"> - Minutes: Interval expressed in minutes (default 60 minutes) - Daily: Batch job is executed every day at the moment defined in the field at the right. - Weekly: Batch job is executed every week on the day of the week and at the moment defined in the field at the right. - Monthly: Batch job is executed every month on the day and at the moment defined in the field at the right.
Log	True: Logging is enabled (default) False: Logging is disabled
Full log	True: Complete logging is enabled. (Also exceptions are logged, this kind of log contains more debug info than the standard logging) (default)

	False: Only standard logging is active if option Log is selected.
Log file	Folder + file name of the log file. Click on the <i>browse</i> button  to select this file.
Maximum count	Maximum number of items that can be processed in one run of the batch job. (Default 5)
Stop batch job on error	True: Set batch job in Error state when an error occurs (default True)

Note: Creating or modifying a batch job sets the status to Disabled.

3.3.13 Test Input Stream

Disable linked batch jobs before testing the configuration.

For each type of Input Connector, you can test your configuration.

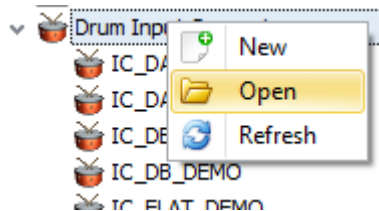
Field	Description
Ribbon bar	<div>Test</div> Press this button to perform a test upload.

3.4 How to delete an input connector

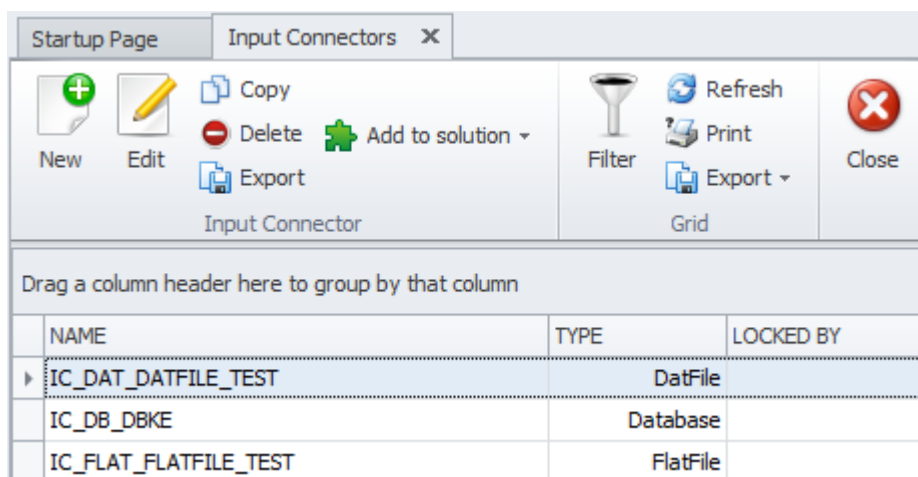
How to delete an input connector in the Arco Doma Admin module.

Disable all batch jobs connected to the Input Connector before continuing.

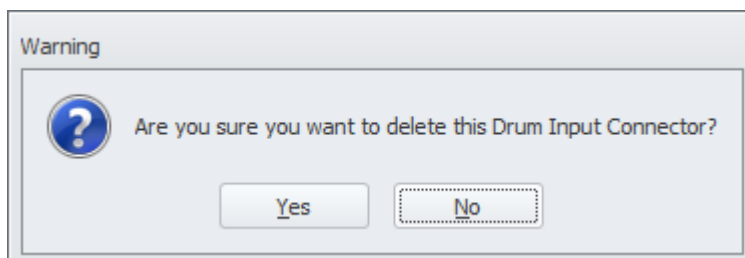
- Start the Doma admin module.
- Open the item “**Configuration**” in the navigation tree.
- Put the cursor on the item “**Drum Input Connectors**” of the navigation tree.



- Click on the right mouse button - a context menu appears.
- Select the option Open.



- A tab with an overview of all existing input connectors now appears.
- Select the Input Connector you want to delete in the overview.
- Click on the Delete icon in the toolbar, *or click on the “Delete” icon in the context menu of the grid or press the keys [CTRL] + [D]*



- A confirmation window appears.
- Click on the button Yes to delete the IC.
- Click on the button No to cancel.

4 Scenarios

4.1 Introduction

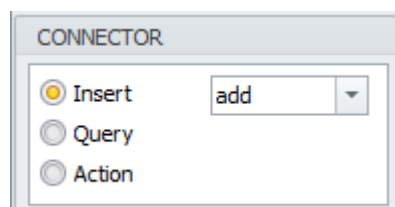
A scenario defines what you do with the information gathered by the input connector.

You can link more than one scenario to an input connector.

There are 4 types of scenarios:

1. Folder scenario
2. Dossier scenario
3. Document/Mail scenario
4. Workflow scenario

In a scenario, you have different *connector options*:



Connector	Description
Insert	add: Insert object in Doma. adddispatch: Insert object in Doma and dispatch the first step of the linked workflow.
Query	Define a query to retrieve one or more objects in DocRoom – then define an action to indicate what has to be done with the search result.
Action	Here you can define which action has to be done when the value of a certain IC property equals the value defined in this configuration. E.g. if the value of the IC Property Comments = 1, then an update value has to be done.

Next to the connector options, you also have to configure the input stream connector in several configuration tabs.

4.2 How to create/edit a scenario

- Follow the steps explained in Chapter “How to edit an input connector”
- Go to tab “Scenarios”
- Continue with chapter 3.3.11 Tab Scenarios.

4.2.1 Folder scenario

Use this scenario only in one (or more) of these conditions:

- if you want to enter property values on a folder;
- if you want to create folders without documents/workflows;
- if you want to create a folder structure using several folder categories.

4.2.1.1 Connector

Connector	Description
Insert	add: Insert folder in Doma. adddispatch: Insert folder in Doma and dispatch the first step of the linked workflow.
Query	Define a query to retrieve one or more folders in Doma – then define an action to indicate what has to be done with the search result. Search: DIN DIN of the folder Name Name of the folder Category Category of the folder Properties Properties of the folder Result: None add, adddispatch, nothing One add, adddispatch, update, updatedispatch, delete, nothing More add, adddispatch, update, updatedispatch, delete, nothing
Action	Here you can define which action has to be done when the value of a certain IC property equals the value defined in this configuration. Search: DIN DIN of the folder Name Name of the folder Category Category of the folder Properties Properties of the folder Action: IC Property One of the IC Properties add value Value of the IC Property which triggers an “Add” adddispatch value Value of the IC Property which triggers an “Add & Dispatch” update value Value of the IC Property which triggers an “Update” updatedispatch value Value of the IC Property which triggers an “Update & Dispatch” delete value Value of the IC Property which triggers a “Delete”

Default connector = “Insert – Add”.

4.2.1.2 Meta data

Block	Description	
Tab Folder Name	Constant	True: Value = constant False: Value = value of IC Property
	Value	Constant or Value of IC Property (combo box with all available IC Properties) = folder name
	A concatenation is performed when you define more than one row in this grid.	
Tab Folder Category	Constant	True: Value = constant False: Value = value of IC Property
	Value	Constant (combo box with all available folder categories) or Value of IC Property (combo box with all available IC Properties) = Name of the folder category
Tab Parent folder Path	Constant	True: Value = constant False: Value = value of IC Property or link to folder scenario
	Value	Constant or Value of IC Property (combo box with all available IC Properties) or Link to folder scenario = Complete folder path, e.g. Invoices\#DATEYYYY#\Arco
	A concatenation is performed when you define more than one row in this grid.	
Tab Parent folder Category	Constant	True: Value = constant False: Value = value of IC Property
	Value	Constant (combo box with all available folder categories) or Value of IC Property (combo box with all available IC Properties) = Name of the folder category
Tab Properties	Name	Name of the folder property (combo box with all available properties)
	Constant	True: Value = constant False: Value = value of IC Property
	Value	Constant or Value of IC Property (combo box with all available IC Properties) = Property value

Example 1: Simple folder structure



Create subfolder DD with category Demo in folder YYYY\MM with category Folder.

Set properties of subfolder DD:

Content = value of IC Property KEYWORDS

Date demo = Constant #DATE# (= current date)

Web:

Folder	 VMORACLE10 KVDWA\2012\05
Category	Demo
Name	 30
Default tree action	Browse
Default result screen	
Default search screen	
Content	Drum
Date Demo	30-05-2012 00:00:00

Drum configuration:

Meta data	Example		
Tab Folder Folder	Constant	Value	
	<input checked="" type="checkbox"/>	#DATEDD#	
Tab Folder Category	Constant	Value	
	<input checked="" type="checkbox"/>	Demo	
Tab Parent folder Path	Constant	Value	
	<input checked="" type="checkbox"/>	#DATEYYYY#	
	<input checked="" type="checkbox"/>	\	
Tab Parent folder Category	Constant	Value	
	<input checked="" type="checkbox"/>	Folder	
Tab Properties	Name	Constant	Value
	Content	<input type="checkbox"/>	KEYWORDS
	Date Demo	<input checked="" type="checkbox"/>	#DATE#

Example 2: Complex folder structure

Create subfolder MM with category MonthFolder in folder YYYY with category YearFolder
Create subfolder DD with category DayFolder in folder MM with category MonthFolder

Web:

2012
05
30

Drum configuration:

In this case, you have to define 2 folder scenarios:

- Create subfolder MM with category MonthFolder in folder YYYY with category YearFolder
- Create subfolder DD with category DayFolder in the folder as result of scenario 1.

Scenario 1 (seq = 1)

Meta data	Example		
Tab Folder Folder	Constant	Value	
	<input checked="" type="checkbox"/>	#DATEMM#	
Tab Folder Category	Constant	Value	
	<input checked="" type="checkbox"/>	MonthFolder	
Tab Parent folder Path	Constant	Value	
	<input checked="" type="checkbox"/>	#DATEYYYY#	
Tab Parent folder Category	Constant	Value	
	<input checked="" type="checkbox"/>	YearFolder	

Scenario 2 (seq = 2)

Meta data	Example	
Tab Folder Folder	Constant	Value
	<input checked="" type="checkbox"/>	#DATEDD#
Tab Folder Category	Constant	Value
	<input checked="" type="checkbox"/>	DayFolder
Tab Parent folder Path	Constant	Value
	<input type="checkbox"/>	link to: 1

Note: use "link to" if you want to use the result of another scenario as value.

More information about configuring meta data can be found in chapter 4.2.5.

4.2.2 Dossier scenario

Use this scenario only in one (or more) of these conditions:

- if you want to enter property values on a dossier;
- if you want to create dossiers without documents/workflows;
- if you want to create a dossier structure using several dossier categories.

Do you need to create a dossier in a folder with a complex structure (i.e. of several categories)? Create first a folder scenario before creating a Dossier scenario.

4.2.2.1 Connector

Connector	Description
Insert	add: Insert dossier in Doma. adddispatch: Insert dossier in Doma and dispatch the first step of the linked workflow.

Query	<p>Define a query to retrieve one or more dossiers in Doma – then define an action to indicate what has to be done with the search result.</p> <p>Search:</p> <p>DIN DIN of the dossier</p> <p>Name Name of the dossier</p> <p>Category Category of the dossier</p> <p>Properties Properties of the dossier</p> <p>Result:</p> <p>None add, adddispatch, nothing</p> <p>One add, adddispatch, update, updatedispatch, delete, nothing</p> <p>More add, adddispatch, update, updatedispatch, delete, nothing</p>
Action	<p>Here you can define which action has to be done when the value of a certain IC property equals the value defined in this configuration.</p> <p>Search:</p> <p>DIN DIN of the dossier</p> <p>Name Name of the dossier</p> <p>Category Category of the dossier</p> <p>Properties Properties of the dossier</p> <p>Action:</p> <p>IC Property One of the IC Properties</p> <p>add value Value of the IC Property which triggers an “Add”</p> <p>adddispatch value Value of the IC Property which triggers an “Add & Dispatch”</p> <p>update value Value of the IC Property which triggers an “Update”</p> <p>updatedispatch value Value of the IC Property which triggers an “Update & Dispatch”</p> <p>delete value Value of the IC Property which triggers a “Delete”</p>

Default connector = “Insert – Add”.

4.2.2.2 Meta data

Block	Description
Tab Dossier Name	<p>Constant True: Value = constant False: Value = value of IC Property</p> <p>Value Constant or Value of IC Property (combo box with all available IC Properties) = dossier name</p> <p>A concatenation is performed when you define more than one row in this grid.</p>
Tab Dossier Category	<p>Constant True: Value = constant False: Value = value of IC Property</p> <p>Value Constant (combo box with all available dossier categories) or Value of IC Property (combo box with all available IC Properties) = Name of the dossier category</p>
Tab Parent dossier Path	<p>Constant True: Value = constant False: Value = value of IC Property or link to dossier scenario</p> <p>Value Constant or Value of IC Property (combo box with all available IC Properties) or Link to dossier scenario = Complete dossier path, e.g. Invoices\Arco</p> <p>A concatenation is performed when you define more than one row in this grid.</p>
Tab Parent dossier Category	<p>Constant True: Value = constant False: Value = value of IC Property</p> <p>Value Constant (combo box with all available dossier categories) or Value of IC Property (combo box with all available IC Properties) = Name of the dossier category</p>
Tab Folder Path	<p>Constant True: Value = constant False: Value = value of IC Property or link to folder scenario</p>

	Value	Constant or Value of IC Property (combo box with all available IC Properties) or Link to folder scenario = Complete folder path, e.g. Invoices\#DATEYYYY#\Arco A concatenation is performed when you define more than one row in this grid.
Tab Folder Category	Constant	True: Value = constant False: Value = value of IC Property
	Value	Constant (combo box with all available folder categories) or Value of IC Property (combo box with all available IC Properties) = Name of the folder category
Tab Properties	Name	Name of the dossier property (combo box with all available properties)
	Constant	True: Value = constant False: Value = value of IC Property
	Value	Constant or Value of IC Property (combo box with all available IC Properties) = Property value

Example 1: Simple dossier structure, without sub dossier

Create dossier [value of IC Property SUBJECT] with category **Invoices** in folder **YYYY\MM\DD** with category **DayFolder**.

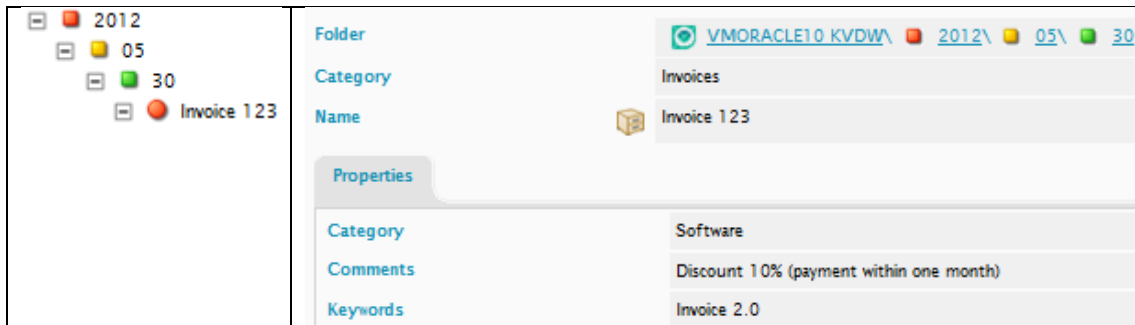
Set properties of dossier [value of IC Property SUBJECT]:

Category = value of IC Property CATEGORY

Comments = value of IC Property COMMENTS

Keywords = value of IC Property KEYWORDS

Web:



Drum configuration:

Meta data	Example	
Tab Dossier Name	Constant	Value
	<input type="checkbox"/>	SUBJECT
Tab Dossier Category	Constant	Value
	<input checked="" type="checkbox"/>	Invoices
Tab Folder Path	Constant	Value
	<input checked="" type="checkbox"/>	#DATEYYYY#\#DATEMM#\#DATEDD#
Tab Folder Category	Constant	Value
	<input checked="" type="checkbox"/>	DayFolder

Tab Properties	Name	Constant	Value
	Category	<input type="checkbox"/>	CATEGORY
	Comments	<input type="checkbox"/>	COMMENTS
	Keywords	<input type="checkbox"/>	KEYWORDS

Example 2: Simple dossier structure, with sub dossier

Create sub dossier **[value of IC Property CATEGORY]** with category **Payment** in dossier **Invoice 123** with category **Invoices** in folder **YYYYMMDD** with category **DayFolder**.

Set properties of sub dossier Payment:

Amount = value of IC Property KEYWORDS

Date payment = Constant #DATE# (= current date)

Web:

	<table> <tr><td>Folder</td><td>VMORACLE10 KVDWA \ 2012\ 05\ 30\Invoice_123</td></tr> <tr><td>Category</td><td>Payment</td></tr> <tr><td>Name</td><td>Payment</td></tr> <tr><td>Default tree action</td><td>Browse</td></tr> <tr><td>Default result screen</td><td></td></tr> <tr><td>Default search screen</td><td></td></tr> <tr><td>Amount</td><td>12000 €</td></tr> <tr><td>Date payment</td><td>30-05-2012</td></tr> </table>	Folder	VMORACLE10 KVDWA \ 2012\ 05\ 30\Invoice_123	Category	Payment	Name	Payment	Default tree action	Browse	Default result screen		Default search screen		Amount	12000 €	Date payment	30-05-2012
Folder	VMORACLE10 KVDWA \ 2012\ 05\ 30\Invoice_123																
Category	Payment																
Name	Payment																
Default tree action	Browse																
Default result screen																	
Default search screen																	
Amount	12000 €																
Date payment	30-05-2012																

Drum configuration:

Meta data	Example		
Tab Dossier Name	Constant	Value	
	<input type="checkbox"/>	CATEGORY	
Tab Dossier Category	Constant	Value	
	<input checked="" type="checkbox"/>	Payment	
Tab Parent dossier Path	Constant	Value	
	<input checked="" type="checkbox"/>	Invoice 123	
Tab Parent dossier Category	Constant	Value	
	<input checked="" type="checkbox"/>	Invoices	
Tab Folder Path	Constant	Value	
	<input checked="" type="checkbox"/>	#DATEYYYY#\#DATEMM#\#DATEDD#	
Tab Folder Category	Constant	Value	
	<input checked="" type="checkbox"/>	DayFolder	
Tab Properties	Name	Constant	Value
	Amount	<input type="checkbox"/>	TITLE
	Date payment	<input checked="" type="checkbox"/>	#DATE#

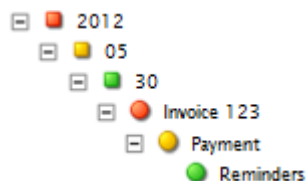
Example 3: Complex dossier structure

Create dossier **Invoice 123 (=dossier A)** with category **Invoices** in folder **YYYYMMDD** with category **DayFolder**.

Create sub dossier **[value of IC Property CATEGORY] (=dossier B)** with category **Payment** in dossier **A**.

Create sub dossier **[value of IC Property TITLE] (=dossier C)** with category **Reminder** in dossier **B**.

Web:



Drum configuration:

In this case, you have to define 2 dossier scenarios:

- Create dossier A and dossier B.
- Create dossier C in the dossier as result of scenario 1.

Scenario 1 (seq = 1)

Meta data	Example	
Tab Dossier Name	Constant	Value
	<input type="checkbox"/>	CATEGORY
Tab Dossier Category	Constant	Value
	<input checked="" type="checkbox"/>	Payment
Tab Parent dossier Path	Constant	Value
	<input checked="" type="checkbox"/>	Invoice 123
Tab Parent dossier Category	Constant	Value
	<input checked="" type="checkbox"/>	Invoices
Tab Folder Path	Constant	Value
	<input checked="" type="checkbox"/>	#DATEYYYY#\#DATEMM#\#DATEDDD#
Tab Folder Category	Constant	Value
	<input checked="" type="checkbox"/>	DayFolder

Scenario 2 (seq = 2)

Meta data	Example	
Tab Dossier Name	Constant	Value
	<input type="checkbox"/>	TITLE
Tab Dossier Category	Constant	Value
	<input checked="" type="checkbox"/>	Reminder
Tab Parent dossier Path	Constant	Value
	<input type="checkbox"/>	link to: 1

Note: use "link to" if you want to use the result of another scenario as value.

More information about configuring meta data can be found in chapter 4.2.5.

4.2.3 Document/Mail scenario

Use this scenario if you want to create a Document/Mail in Doma. The document can be linked to a package of a dossier. A simple folder structure (i.e. one folder or folder structure

with same category) and/or simple dossier structure (i.e. one dossier or dossier structure with same category) can also be created by this scenario.

Do you need to create a document/mail in a folder with a complex structure (i.e. of several categories)? Create first a folder scenario before creating a Document/Mail scenario.

Do you need to create a document/mail in a dossier with a complex structure (i.e. of several categories)? Create first a dossier scenario before creating a Document/Mail scenario.

4.2.3.1 Connector

Connector	Description
Insert	add : Insert document in Doma. adddispatch : Insert document in Doma and dispatch the first step of the linked workflow.
Query	Define a query to retrieve one or more documents in Doma – then define an action to indicate what has to be done with the search result. Search: DIN DIN of the document Name Name of the document Category Category of the document Properties Properties of the document Result: None add, adddispatch, nothing One add, adddispatch, update, updatedispatch, newversion, newsubversion, delete, nothing More add, adddispatch, update, updatedispatch, newversion, newsubversion, delete, nothing
Action	Here you can define which action has to be done when the value of a certain IC property equals the value defined in this configuration. Search: DIN DIN of the document Name Name of the document Category Category of the document Properties Properties of the document Action: IC Property One of the IC Properties add value Value of the IC Property which triggers an “Add” adddispatch value Value of the IC Property which triggers an “Add & Dispatch” update value Value of the IC Property which triggers an “Update” updatedispatch value Value of the IC Property which triggers an “Update & Dispatch” newversion value Value of the IC Property which triggers a “Update - New Version” newsubversion value Value of the IC Property which triggers a “Update - New Sub Version” delete value Value of the IC Property which triggers a “Delete”

Default connector = “Insert – Add”.

4.2.3.2 Meta data

Block	Description
Tab Object Type	Constant True: Value = constant False: Value = value of IC Property Value Constant (combo box with Document and Mail) or Value of IC Property (combo box with all available IC Properties)

= Object type (Document or Mail)			
Tab Object Name	Constant	True: Value = constant False: Value = value of IC Property	
	Value	Constant or Value of IC Property (combo box with all available IC Properties) = Document name	
A concatenation is performed when you define more than one row in this grid.			
Tab Object Category	Constant	True: Value = constant False: Value = value of IC Property	
	Value	Constant (combo box with all available document categories) or Value of IC Property (combo box with all available IC Properties) = Name of the document category	
Tab Folder Path	Constant	True: Value = constant False: Value = value of IC Property or link to folder scenario	
	Value	Constant or Value of IC Property (combo box with all available IC Properties) or Link to folder scenario = Complete folder path, e.g. Invoices\#DATEYYYY#\Arco	
A concatenation is performed when you define more than one row in this grid.			
Tab Folder Category	Constant	True: Value = constant False: Value = value of IC Property	
	Value	Constant (combo box with all available folder categories) or Value of IC Property (combo box with all available IC Properties) = Name of the folder category	
Tab Properties	Name	Name of the property (combo box with all available properties)	
	Constant	True: Value = constant False: Value = value of IC Property	
	Value	Constant or Value of IC Property (combo box with all available IC Properties) = Property value	
Tab Files	Title	Constant	True: Title = constant False: Title = value of IC Property
	Title	Title	Constant or Value of IC Property (combo box with all available IC Properties) = Title of the file displayed in Doma Web.
	Author	Constant	True: Author = constant False: Author = value of IC Property
	Author	Author	Constant or Value of IC Property (combo box with all available IC Properties) = Author of the file (at this moment, this is not displayed in Doma Web)
	File	Constant	True: File = constant False: File = value of IC Property
	File	File	Constant or Value of IC Property (combo box with all available IC Properties) = Complete path + filename of the file to be uploaded
	General	Main file	True: File = to be uploaded as main file False: File = to be uploaded as attachment
	General	URL	File contains an URL instead of a file
	General	Unknown	True: Allow to upload files with file extensions not known in Doma.
	Fulltext	Contant	True: Fulltext = constant False: Fulltext = value of IC Property
	Fulltext	Fulltext	Constant or Value of IC Property (combo box with all available IC Properties) = complete path + filename or text

	<i>Fulltext</i>	<i>Filename</i>	<i>True: Fulltext contains complete path + filename False: Fulltext contains text</i>
	<i>(Some columns are hidden. Right-click on the header to show context menu. "Choose Column/Band Chooser".)</i>		
	Define one row per file.		
Tab Templates	Only to be used when you want to use Document templates. You have to define the document templates first (not in the scope of this document) before using this block.		
	Template:		
	Template	Template	Name of the document template (combo box with all available document templates)
	Template	Main file	True: File = to be uploaded as main file False: File = to be uploaded as attachment
	Title	Constant – Title	True: Title = constant False: Title = value of IC Property
	Title	Value	Constant or Value of IC Property (combo box with all available IC Properties) = Title of the file displayed in Doma Web.
	Author	Constant – Author	True: Author = constant False: Author = value of IC Property
	Author	Value	Constant or Value of IC Property (combo box with all available IC Properties) = Author of the file (at this moment, this is not displayed in Doma Web)
	Each template has several bookmarks. Select document template and press button "Add bookmark".		
	Bookmark:		
	Name	Name of the bookmark (combo box with all available bookmarks)	
	Constant	True: Value = constant False: Value = value of IC Property	
	Value	Constant or Value of IC Property (combo box with all available IC Properties) = Text to be replaced in the bookmark	
Tab Mail Attachment	From	Constant = true : Value = constant Constant = false: Value = value of IC Property (combo box with all available IC Properties)	
	To	Constant = true : Value = constant Constant = false: Value = value of IC Property (combo box with all available IC Properties)	
	CC	Constant = true : Value = constant Constant = false: Value = value of IC Property (combo box with all available IC Properties)	
	BCC	Constant = true : Value = constant Constant = false: Value = value of IC Property (combo box with all available IC Properties)	
	Date	Constant = true : Value = constant Constant = false: Value = value of IC Property (combo box with all available IC Properties)	
	Subject	Constant = true : Value = constant Constant = false: Value = value of IC Property (combo box with all available IC Properties)	
	Body	Constant = true : Value = constant Constant = false: Value = value of IC Property (combo box with all available IC Properties)	
	Attachment file	Constant = true : Value = constant Constant = false: Value = value of IC Property (combo box with all available IC Properties)	
	Attachment filename	Constant = true : Value = constant	

Constant = false: Value = value of IC Property (combo box with all available IC Properties)			
Tab Dossiers	Folder	Constant – Category	True: Category = constant False: Category = value of IC Property
	Folder	Category	Constant (combo box with all available folder categories) or Value of IC Property (combo box with all available IC Properties) = Name of the folder category
	Folder	Constant – Path	True: Path = constant False: Path = value of IC Property or link to folder scenario
	Folder	Path	Constant or Value of IC Property (combo box with all available IC Properties) or Link to folder scenario = Complete folder path, e.g. Invoices\#DATEYYYY#\Arco
	Dossier	Constant – Category	True: Category = constant False: Category = value of IC Property
	Dossier	Category	Constant (combo box with all available dossier categories) or Value of IC Property (combo box with all available IC Properties) = Name of the dossier category
	Dossier	Constant – Path	True: Path = constant False: Path = value of IC Property or link to dossier scenario
	Dossier	Path	Constant or Value of IC Property (combo box with all available IC Properties) or Link to dossier scenario = Complete dossier path, e.g. CustomerX\ProjectY
	Package	Constant	True: Package = constant False: Package = value of IC Property
	Package	Package	Constant (combo box with all available packages) or Value of IC Property (combo box with all available IC Properties) = Name of the dossier package
Define one row per dossier.			

Example 1: Create document in a simple folder structure

Create document with title **[value of IC Property FILENAME]** of category **Document** in folder **YYYYMMDD** of category **DayFolder**.

Add file: file = **[value of IC Property FILE]** ; title = **[value of IC Property FILENAME]**

Set properties of document **[value of IC Property FILENAME]**:

Drum id = value of IC Property SUBJECT

Web:

Folder: VMORACLE10 KVDW\ 2012\ 05\ 30

Name: ScanSplitter 3 - Technical manual.docx

Category: Document

drum id: 154

Files

Name
ScanSplitter 3 - Technical manual.docx

Drum configuration:

Meta data	Example		
Tab Object Type	Constant	Value	
	<input checked="" type="checkbox"/>	Document	
Tab Object Name	Constant	Value	
	<input type="checkbox"/>	FILENAME	
Tab Object Category	Constant	Value	
	<input checked="" type="checkbox"/>	Document	
Tab Folder Path	Constant	Value	
	<input checked="" type="checkbox"/>	#DATEYYYY#\#DATEMM#\#DATEDD#	
Tab Folder Category	Constant	Value	
	<input checked="" type="checkbox"/>	DayFolder	
Tab Properties	Name	Constant	Value
	drum id	<input type="checkbox"/>	SUBJECT
Tab Files	Title	Author	File
	Constant	Title	Author
	<input type="checkbox"/>	FILENAME	<input type="checkbox"/> AUTHOR

Example 2: Create document with e-mail as attachment in a simple folder structure

Create document with title **[value of IC Property SUBJECT]** of category **Document** in folder **YYYYMMDD** of category **DayFolder**.

Add mail with IC Properties available from Mail Input Connector.

Web:

Folder: VMORACLE10 KVDW\ 2012\ 05\ 30

Name: FW: Petz: 3 facturen - RETRY

Category: Document

drum id: 0

Files

Name
FW: Petz: 3 facturen - RETRY

Drum configuration:

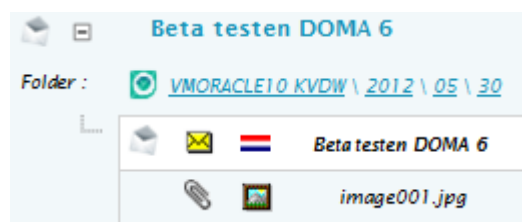
Meta data	Example		
Tab Object Type	Constant	Value	
	<input checked="" type="checkbox"/>	Document	
Tab Object Name	Constant	Value	
	<input type="checkbox"/>	SUBJECT	
Tab Object Category	Constant	Value	
	<input checked="" type="checkbox"/>	Document	
Tab Folder Path	Constant	Value	
	<input checked="" type="checkbox"/>	#DATEYYYY#\#DATEMM#\#DATEDDD#	
Tab Folder Category	Constant	Value	
	<input checked="" type="checkbox"/>	DayFolder	
Tab Mail Attachment	Name	Constant	Value
	<input checked="" type="checkbox"/> From	<input type="checkbox"/>	FROM
	To	<input type="checkbox"/>	TO
	CC	<input type="checkbox"/>	CC
	BCC	<input type="checkbox"/>	BCC
	Date	<input type="checkbox"/>	DATE
	Subject	<input type="checkbox"/>	SUBJECT
	Body	<input type="checkbox"/>	BODYHTML
	Attachment file	<input type="checkbox"/>	ATTFILES
	Attachment filename	<input type="checkbox"/>	ATTFILENAMES

Example 3: Create mail object in a simple folder structure

Create mail object with title **[value of IC Property SUBJECT]** in folder **YYYYMMDD** of category **DayFolder**.

Fill up mail object with IC Properties available from Mail Input Connector.

Web:



Drum configuration:

Meta data	Example		
Tab Object Type	Constant	Value	
	<input checked="" type="checkbox"/>	Mail	
Tab Folder Path	Constant	Value	
	<input checked="" type="checkbox"/>	#DATEYYYY#\#DATEMM#\#DATEDDD#	
Tab Folder Category	Constant	Value	
	<input checked="" type="checkbox"/>	DayFolder	

Tab Mail Attachment			
Name	Constant	Value	
► From	<input type="checkbox"/>	FROM	
To	<input type="checkbox"/>	TO	
CC	<input type="checkbox"/>	CC	
BCC	<input type="checkbox"/>	BCC	
Date	<input type="checkbox"/>	DATE	
Subject	<input type="checkbox"/>	SUBJECT	
Body	<input type="checkbox"/>	BODYHTML	
Attachment file	<input type="checkbox"/>	ATTFILES	
Attachment filename	<input type="checkbox"/>	ATTFILENAMES	

Example 4: Create document in a simple folder structure and link this document to a dossier.
Create document with title [value of IC Property FILENAME] of category **Document** in folder YYYYMMDD of category **DayFolder**.

Add file: file = [value of IC Property FILE] ; title = [value of IC Property FILENAME]

Set properties of document [value of IC Property FILENAME]:

Drum id = value of IC Property SUBJECT

Link this document to dossier **Invoice 123** of category **Invoices**. Use package "Documents".

This dossier can be found in folder YYYYMMDD of category **DayFolder**.

Web:

Drum configuration:

Meta data	Example	
Tab Object Type	Constant	Value
	► <input checked="" type="checkbox"/>	Document
Tab Object Name	Constant	Value
	► <input type="checkbox"/>	FILENAME
Tab Object Category	Constant	Value
	► <input checked="" type="checkbox"/>	Document
Tab Folder Path	Constant	Value
	► <input checked="" type="checkbox"/>	#DATEYYYY#\#DATEMM#\#DATEDDD#
Tab Folder Category	Constant	Value
	► <input checked="" type="checkbox"/>	DayFolder

Tab Properties	Name	Constant	Value
	▶ drum id	<input type="checkbox"/>	SUBJECT
Tab Files	Title	Author	File
	Constant	Title	Constant
	▶ <input type="checkbox"/>	FILENAME	<input type="checkbox"/>
Tab Dossiers	Folder	Dossier	Package
	... Category	... Path	... Category
	<input checked="" type="checkbox"/> DayFolder	<input checked="" type="checkbox"/> #DATEYYYY#\#DATEMM#\#DATEDD#	<input checked="" type="checkbox"/> Invoices

Example 5: Create document in a complex folder structure

Create folder YYYY of category YearFolder.

Create subfolder MM of category MonthFolder in folder YYYY.

Create subfolder DD of category DayFolder in folder YYYYMM.

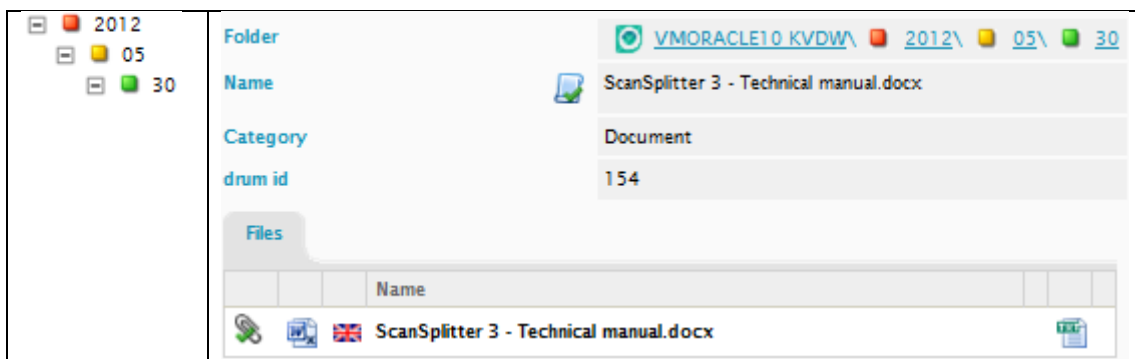
Create document with title **[value of IC Property FILENAME]** of category **Document** in folder **YYYYMMDD**.

Add file: file = **[value of IC Property FILE]** ; title = **[value of IC Property FILENAME]**

Set properties of document **[value of IC Property FILENAME]**:

Drum id = value of IC Property SUBJECT

Web:



In this case, you have to define 3 scenarios:

- Create folder YYYY and subfolder YYYY\MM: folder scenario
- Create subfolder DD in the folder as result of scenario 1: folder scenario
- Create document in the subfolder as result of scenario 2: document scenario

Scenario 1 & 2 (seq = 1 and 2)

See "Example 2" in chapter Folder scenario.

Scenario 3 (seq = 3, document scenario)

Meta data	Example	
Tab Object Type	Constant	Value
	▶ <input checked="" type="checkbox"/>	Document
Tab Object Name	Constant	Value
	▶ <input type="checkbox"/>	FILENAME
Tab Object Category	Constant	Value
	▶ <input checked="" type="checkbox"/>	Document
Tab Folder Path	Constant	Value
	I <input type="checkbox"/>	link to: 2

Tab Properties	Name	Constant	Value	
	▶ drum id	<input type="checkbox"/>	SUBJECT	
Tab Files	Title	Author	File	
	Constant	Title	Constant	Author
	▶ <input type="checkbox"/>	FILENAME	<input type="checkbox"/>	AUTHOR
			<input type="checkbox"/>	FILE

Note: use "link to" if you want to use the result of another scenario as value.

Example 6: Create dossier with properties and document with properties

Create dossier [value of IC Property SUBJECT] of category **Invoices** in folder YYYYMMDD of category **DayFolder**.

Set properties of dossier [value of IC Property SUBJECT]:

Category = value of IC Property CATEGORY

Comments = value of IC Property COMMENTS

Keywords = value of IC Property KEYWORDS

Create document with title [value of IC Property FILENAME] of category **Document** in folder YYYYMMDD of category **DayFolder**.

Add file: file = [value of IC Property FILE] ; title = [value of IC Property FILENAME]

Set properties of document [value of IC Property FILENAME]:

Drum id = value of IC Property SUBJECT

Link this document to dossier [value of IC Property SUBJECT]. Use package "Documents".

Web:

The screenshot displays the Arco application interface. On the left, a folder tree shows a hierarchy: 2012 > 05 > 30 > Invoice 123. The main area is divided into two panels. The top panel shows the properties of the 'Invoice 123' dossier, including its category (Invoices), name (Invoice 123), and various properties like Category (Software), Comments (Discount 10% (payment within one month)), and Keywords (Invoice 2.0). The bottom panel shows the properties of a document titled 'ScanSplitter 3 - Technical manual.docx', including its category (Document), drum id (154), and a list of linked dossiers (Invoice 123). The interface also shows a list of files associated with the document, including 'ScanSplitter 3 - Technical manual.docx'.

In this case, you have to define 2 scenarios:

- Create dossier with its properties: dossier scenario
- Create document with its properties and link to dossier as result of scenario 1: document scenario

Scenario 1 (seq = 1)

See "Example 1" in chapter Dossier scenario.

Scenario 2 (seq = 2)

Meta data		Example	
Tab Object Type	Constant	Value	
	<input checked="" type="checkbox"/>	Document	
Tab Object Name	Constant	Value	
	<input type="checkbox"/>	FILENAME	
Tab Object Category	Constant	Value	
	<input checked="" type="checkbox"/>	Document	
Tab Folder Path	Constant	Value	
	<input checked="" type="checkbox"/>	#DATEYYYY#\#DATEMM#\#DATEDD#	
Tab Folder Category	Constant	Value	
	<input checked="" type="checkbox"/>	DayFolder	
Tab Properties	Name	Constant	Value
	drum id	<input type="checkbox"/>	SUBJECT
Tab Files	Title	Author	File
	Constant	Title	Constant
	<input type="checkbox"/>	FILENAME	<input type="checkbox"/>
Tab Dossiers	Folder	Dossier	Package
	... Category	... Path	... Package
	<input checked="" type="checkbox"/> DayFolder	<input checked="" type="checkbox"/> Invoices	<input checked="" type="checkbox"/> link to: 1 Documents

Note: use "link to" if you want to use the result of another scenario as value.

More information about configuring meta data can be found in chapter 4.2.5.

4.2.4 Workflow scenario

Use this scenario if you want to create a Workflow in Doma. The workflow can be linked to a package of a dossier. A simple folder structure (i.e. one folder or folder structure with same category) and/or simple dossier structure (i.e. one dossier or dossier structure with same category) can also be created by this scenario.

Do you need to create a workflow in a folder with a complex structure (i.e. of several categories)? Create first a folder scenario before creating a Workflow scenario.

Do you need to create a workflow in a dossier with a complex structure (i.e. of several categories)? Create first a dossier scenario before creating a Workflow scenario.

Do you need to add a document to a workflow package? Create first a document scenario before creating a Workflow scenario.

The screenshot shows the Doma 6 application interface. At the top, there are three buttons: 'Save' (floppy disk icon), 'Save & Close' (floppy disk with checkmark icon), and 'Close' (red circle with 'X' icon). Below these, the interface is divided into two main sections. On the left, the 'Input Stream Connector' panel has a 'CONNECTOR' section with two radio buttons: 'Insert' (selected) and 'Query'. The 'Insert' button has a dropdown menu showing 'add'. On the right, the 'Workflow' panel has three sections: 'Procedure name', 'Workflow name', and 'Starter'. Each section has a 'Constant' and 'Value' input field, and a set of buttons: 'Add', 'Up', 'Down', and 'Delete'. The 'Workflow' panel also has a sidebar with tabs: 'Package', 'Folder', 'Properties', 'Files', and 'Dossiers'.

4.2.4.1 Connector

Connector	Description
Insert	add: Insert workflow in Doma. adddispatch: Insert workflow in Doma and dispatch the first step.
Query	Define a query to retrieve one or more workflows in Doma – then define an action to indicate what has to be done with the search result. Search: <div> <div>Tech ID</div> <div>Tech ID of the workflow</div> </div> <div> <div>Workflow</div> <div>Name of the workflow</div> </div> <div> <div>Proc.</div> <div>Name of the procedure</div> </div> <div> <div>Properties</div> <div>Properties of the workflow</div> </div> Result: <div> <div>None</div> <div>add, adddispatch, nothing</div> </div> <div> <div>One</div> <div>add, adddispatch, update, updatedispatch, delete, nothing</div> </div> <div> <div>More</div> <div>add, adddispatch, update, updatedispatch, delete, nothing</div> </div>

Default connector = "Insert – Add".

4.2.4.2 Meta data

Block	Description
Tab Workflow	Constant True: Value = constant False: Value = value of IC Property
Procedure name	Constant (combo box with all available procedures) or Value of IC Property (combo box with all available IC Properties) = Procedure name

Tab Workflow Workflow name	Constant	True: Value = constant False: Value = value of IC Property	
	Value	Constant or Value of IC Property (combo box with all available IC Properties) = Workflow name	
	A concatenation is performed when you define more than one row in this grid.		
Tab Workflow Starter	Constant	True: Value = constant False: Value = value of IC Property	
	Value	Constant or Value of IC Property (combo box with all available IC Properties) = Workflow starter	
Tab Package	Name	Name of the package (combo box with all available packages)	
	Constant	True: Value = constant False: Value = value of IC Property or link to document scenario	
	Value	Constant or Value of IC Property (combo box with all available IC Properties) or Link to document scenario = DIN of the Doma object.	
Tab Folder Path	Constant	True: Value = constant False: Value = value of IC Property or link to folder scenario	
	Value	Constant or Value of IC Property (combo box with all available IC Properties) or Link to folder scenario = Complete folder path, e.g. Invoices\#DATEYYYY#\Arco	
	A concatenation is performed when you define more than one row in this grid.		
Tab Folder Category	Constant	True: Value = constant False: Value = value of IC Property	
	Value	Constant (combo box with all available folder categories) or Value of IC Property (combo box with all available IC Properties) = Name of the folder category	
Tab Properties	Name	Name of the property (combo box with all available properties)	
	Constant	True: Value = constant False: Value = value of IC Property	
	Value	Constant or Value of IC Property (combo box with all available IC Properties) = Property value	
Tab Files	Title	Constant	True: Title = constant False: Title = value of IC Property
	Title	Title	Constant or Value of IC Property (combo box with all available IC Properties) = Title of the file displayed in Doma Web.
	Author	Constant	True: Author = constant False: Author = value of IC Property
	Author	Author	Constant or Value of IC Property (combo box with all available IC Properties) = Author of the file (at this moment, this is not displayed in Doma Web)
	File	Constant	True: File = constant False: File = value of IC Property
	File	File	Constant or Value of IC Property (combo box with all available IC Properties) = Complete path + filename of the file to be uploaded
	General	Main file	True: File = to be uploaded as main file False: File = to be uploaded as attachment
	General	URL	File contains an URL instead of a file
	General	Unknown	True: Allow to upload files with file extensions not known in Doma.

	<i>Fulltext</i>	<i>Constant</i>	<i>True: Fulltext = constant</i> <i>False: Fulltext = value of IC Property</i>
	<i>Fulltext</i>	<i>Fulltext</i>	<i>Constant or</i> <i>Value of IC Property (combo box with all available IC Properties)</i> <i>= complete path + filename or text</i>
	<i>Fulltext</i>	<i>Filename</i>	<i>True: Fulltext contains complete path + filename</i> <i>False: Fulltext contains text</i>
(Some columns are hidden. Right-click on the header to show context menu. "Choose Column/Band Chooser".) Define one row per file.			
Tab Dossiers	Folder	Constant – Category	True: Category = constant False: Category = value of IC Property
	Folder	Category	Constant (combo box with all available folder categories) or Value of IC Property (combo box with all available IC Properties) = Name of the folder category
	Folder	Constant – Path	True: Path = constant False: Path= value of IC Property or link to folder scenario
	Folder	Path	Constant or Value of IC Property (combo box with all available IC Properties) or Link to folder scenario = Complete folder path, e.g. Invoices\#DATEYYYY#\Arco
	Dossier	Constant – Category	True: Category = constant False: Category = value of IC Property
	Dossier	Category	Constant (combo box with all available dossier categories) or Value of IC Property (combo box with all available IC Properties) = Name of the dossier category
	Dossier	Constant – Path	True: Path = constant False: Path = value of IC Property or link to dossier scenario
	Dossier	Path	Constant or Value of IC Property (combo box with all available IC Properties) or Link to dossier scenario = Complete dossier path, e.g. CustomerX\ProjectY
	Package	Constant	True: Package = constant False: Package = value of IC Property
	Package	Package	Constant (combo box with all available packages) or Value of IC Property (combo box with all available IC Properties) = Name of the dossier package
	Define one row per dossier.		

Example 1: Start up procedure

Startup procedure Demo procedure. Workflow name = [value of IC Property TITLE].

Set workflow properties:


Comments: value of IC Property COMMENTS

Drum: 1

Keywords: value of IC Property KEYWORDS

Subject: value of IC Property SUBJECT

Web:

Procedure	Demo procedure
Name	 Onkosten1
Step	First step
Properties	
Comments	<input type="text"/>
Drum	<input checked="" type="radio"/> Yes <input type="radio"/> No
Keywords	<input type="text"/>
Subject	<input type="text"/>

Drum configuration:

Meta data	Example		
Tab Workflow Procedure name	Constant	Value	
	<input checked="" type="checkbox"/>	Demo procedure	
Tab Workflow Workflow name	Constant	Value	
	<input type="checkbox"/>	TITLE	
Tab Workflow Starter	Constant	Value	
	<input checked="" type="checkbox"/>	ARCO\KATHLEEN	
Tab Properties	Name	Constant	Value
	Comments	<input type="checkbox"/>	COMMENTS
	Drum	<input checked="" type="checkbox"/>	1
	Keywords	<input type="checkbox"/>	KEYWORDS
	Subject	<input type="checkbox"/>	SUBJECT

Example 2: Start up workflow procedure (linked to workflow category)

Startup procedure Demo procedure in folder **YYYYMMDD** of category **DayFolder**. Workflow name = [value of IC Property TITLE].

Add file: file = [value of IC Property FILE] ; title = [value of IC Property FILENAME]

Set workflow properties:

Comments: value of IC Property COMMENTS

Drum: 1

Keywords: value of IC Property KEYWORDS

Subject: value of IC Property SUBJECT

Web:

<p>Elegant Letter</p> <p>Folder: VMORACLE10 KVDW \ 2012 \ 05 \ 31</p> <p>Elegant Letter.doc</p> <p>INK003-Bestelformulier kleine opdrachten (BEFKO)</p> <p>Folder: VMORACLE10 KVDW \ 2012 \ 05 \ 31</p> <p>INK003-Bestelformulier kleine opdrachten (BEFKO).DOC</p> <p>INK009-Inkooplijst</p> <p>Folder: VMORACLE10 KVDW \ 2012 \ 05 \ 31</p> <p>INK009-Inkooplijst.DOC</p> <p>Onkosten1</p> <p>Folder: VMORACLE10 KVDW \ 2012 \ 05 \ 31</p> <p>Onkosten1.xls</p> <p>Professional Report</p> <p>Folder: VMORACLE10 KVDW \ 2012 \ 05 \ 31</p> <p>Professional Report.doc</p>	<p>Procedure</p> <p>Demo procedure</p> <p>Name</p> <p>Elegant Letter</p> <p>Step</p> <p>First step</p> <p>Properties</p> <p>Comments</p> <p>Drum</p> <p>Yes</p> <p>Keywords</p> <p>Subject</p> <p>Files</p> <table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> <tbody> <tr> <td>Elegant Letter.doc</td> </tr> </tbody> </table>	Name	Elegant Letter.doc
Name			
Elegant Letter.doc			

Drum configuration:

Meta data	Example					
Tab Workflow Procedure name	Constant	Value				
	<input checked="" type="checkbox"/>	Demo procedure				
Tab Workflow Workflow name	Constant	Value				
	<input type="checkbox"/>	TITLE				
Tab Workflow Starter	Constant	Value				
	<input checked="" type="checkbox"/>	ARCO\KATHLEEN				
Tab Folder Path	Constant	Value				
	<input checked="" type="checkbox"/>	#DATEYYYY#\#DATEMM#\#DATEDD#				
Tab Folder Category	Constant	Value				
	<input checked="" type="checkbox"/>	DayFolder				
Tab Properties	Name	Constant	Value			
	Comments	<input type="checkbox"/>	COMMENTS			
	Drum	<input checked="" type="checkbox"/>	1			
	Keywords	<input type="checkbox"/>	KEYWORDS			
	Subject	<input type="checkbox"/>	SUBJECT			
Tab Files	Title		Author		File	
	Constant	Title	Constant	Author	Constant	File
	<input type="checkbox"/>	FILENAME	<input type="checkbox"/>	AUTHOR	<input type="checkbox"/>	FILE

Example 3: Start up workflow procedure + link document to a package

A. Create document with title [value of IC Property FILENAME] of category **Document** in folder YYYYMMDD of category **DayFolder**.

B. Startup procedure Demo procedure in folder YYYYMMDD of category **DayFolder**.

Workflow name = [value of IC Property TITLE].

Add document to package **Demo Documents**.

Add file: file = [value of IC Property FILE] ; title = [value of IC Property FILENAME]

Set workflow properties:

Comments: value of IC Property COMMENTS

Drum: 1

Keywords: value of IC Property KEYWORDS

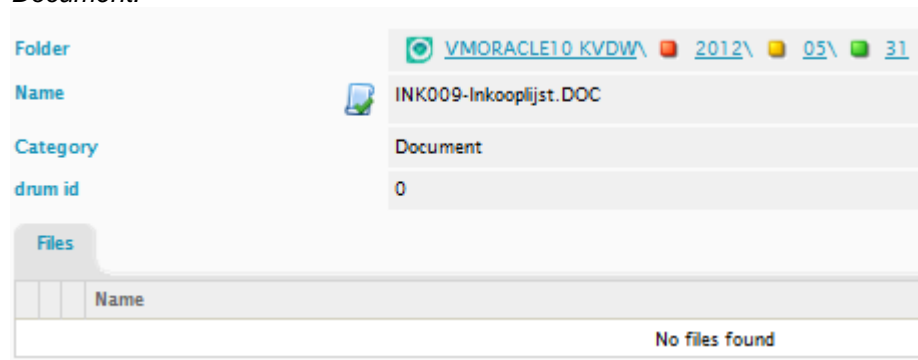
Subject: value of IC Property SUBJECT

Web:

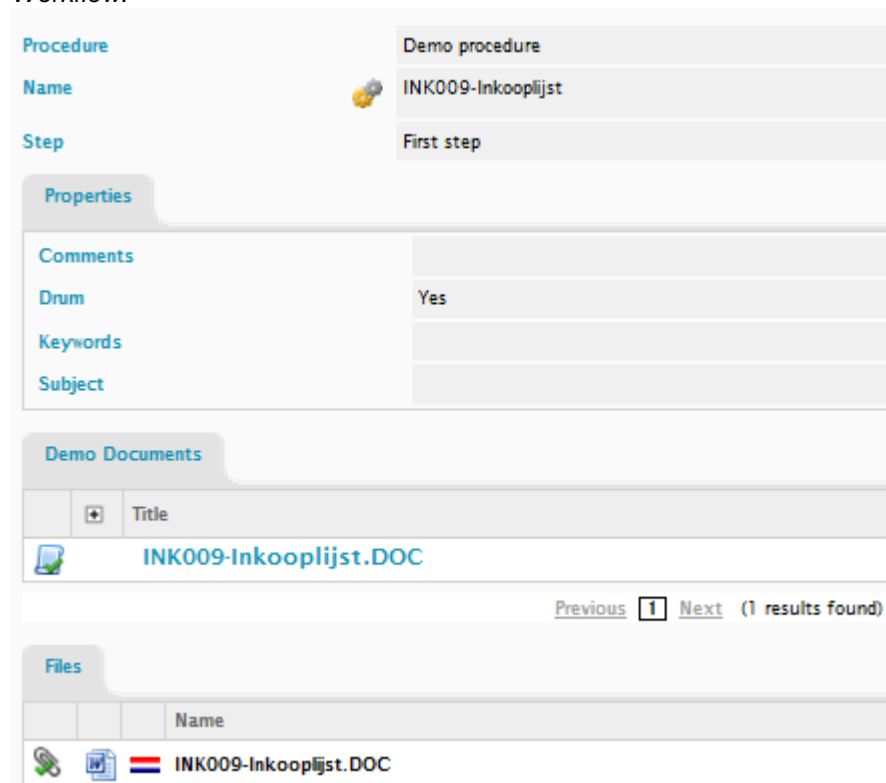
Result screen:



Document:



Workflow:



In this case, you have to define 2 scenarios:

- Create document: document scenario
- Create workflow: workflow scenario

Scenario 1 (seq = 1, document scenario)

Meta data	Example		
Tab Object Type	Constant	Value	
	<input checked="" type="checkbox"/>	Document	
Tab Object Name	Constant	Value	
	<input type="checkbox"/>	FILENAME	
Tab Object Category	Constant	Value	
	<input checked="" type="checkbox"/>	Document	
Tab Folder Path	Constant	Value	
	<input checked="" type="checkbox"/>	#DATEYYYY#\#DATEMM#\#DATEDD#	
Tab Folder Category	Constant	Value	
	<input checked="" type="checkbox"/>	DayFolder	

Scenario 2 (seq = 2, workflow scenario)

Meta data	Example		
Tab Workflow Procedure name	Constant	Value	
	<input checked="" type="checkbox"/>	Demo procedure	
Tab Workflow Workflow name	Constant	Value	
	<input type="checkbox"/>	TITLE	
Tab Workflow Starter	Constant	Value	
	<input checked="" type="checkbox"/>	ARCO\KATHLEEN	
Tab Package	Name	Constant	Value
	Demo Documents	<input type="checkbox"/>	link to: 1
Tab Folder Path	Constant	Value	
	<input checked="" type="checkbox"/>	#DATEYYYY#\#DATEMM#\#DATEDD#	
Tab Folder Category	Constant	Value	
	<input checked="" type="checkbox"/>	DayFolder	
Tab Properties	Name	Constant	Value
	Comments	<input type="checkbox"/>	COMMENTS
	Drum	<input checked="" type="checkbox"/>	1
	Keywords	<input type="checkbox"/>	KEYWORDS
	Subject	<input type="checkbox"/>	SUBJECT
Tab Files	Title	Author	File
	Constant	Title	Constant
	<input type="checkbox"/>	FILENAME	<input type="checkbox"/>


Note: use "link to" if you want to use the result of another scenario as value.





Example 4: See Example 3 + link workflow to a dossier


See Example 3 + link workflow to dossier **Invoices** of category **Invoices** in folder **YYYY\MM\DD** of category **DayFolder** in package **Documents**.





Web:



Result screen:


 **Onkosten1.xls**





Folder :  VMORACLE10 KVDW \  2012 \  05 \  31

 **Onkosten1**






Folder :  VMORACLE10 KVDW \  2012 \  05 \  31

  **Onkosten1.xls**

 **Invoices**

Folder :  VMORACLE10 KVDW \  2012 \  05 \  31


Document:

Folder	 VMORACLE10 KVDW \  2012 \  05 \  31
Name	 INK009-Inkooplijst.DOC
Category	Document
drum id	0

Files

Name
No files found


Workflow:

Procedure	Demo procedure
Name	 Onkosten1
Step	First step


Properties

Comments	
Drum	Yes
Keywords	
Subject	

Linked Dossiers



Title
 Invoices

Demo Documents

Title
 Onkosten1.xls

[Previous](#) **1** [Next](#) (1 results found)

Files

Name
  Onkosten1.xls

In this case, you have to define 2 scenarios:

- Create document: document scenario
- Create workflow: workflow scenario

Scenario 1 (seq = 1, document scenario)

Meta data	Example		
Tab Object Type	Constant	Value	
	<input checked="" type="checkbox"/>	Document	
Tab Object Name	Constant	Value	
	<input type="checkbox"/>	FILENAME	
Tab Object Category	Constant	Value	
	<input checked="" type="checkbox"/>	Document	
Tab Folder Path	Constant	Value	
	<input checked="" type="checkbox"/>	#DATEYYYY#\#DATEMM#\#DATEDD#	
Tab Folder Category	Constant	Value	
	<input checked="" type="checkbox"/>	DayFolder	

Scenario 2 (seq = 2, workflow scenario)

Meta data	Example		
Tab Workflow Procedure name	Constant	Value	
	<input checked="" type="checkbox"/>	Demo procedure	
Tab Workflow Workflow name	Constant	Value	
	<input type="checkbox"/>	TITLE	
Tab Workflow Starter	Constant	Value	
	<input checked="" type="checkbox"/>	ARCO\KATHLEEN	
Tab Package	Name	Constant	Value
	Demo Documents	<input type="checkbox"/>	link to: 1
Tab Folder Path	Constant	Value	
	<input checked="" type="checkbox"/>	#DATEYYYY#\#DATEMM#\#DATEDD#	
Tab Folder Category	Constant	Value	
	<input checked="" type="checkbox"/>	DayFolder	
Tab Properties	Name	Constant	Value
	Comments	<input type="checkbox"/>	COMMENTS
	Drum	<input checked="" type="checkbox"/>	1
	Keywords	<input type="checkbox"/>	KEYWORDS
	Subject	<input type="checkbox"/>	SUBJECT
Tab Files	Title	Author	File
	Constant	Title	Constant
	<input type="checkbox"/>	FILENAME	<input type="checkbox"/>
Tab Dossiers	Folder	Dossier	Package
	... Category	... Path	... Category
	<input checked="" type="checkbox"/> DayFolder	<input checked="" type="checkbox"/> #DATEYYYY#\#DATEMM#\#DATEDD#	<input checked="" type="checkbox"/> Invoices

Note: use "link to" if you want to use the result of another scenario as value.

More information about configuring meta data can be found in chapter 4.2.5.

4.2.5 Configure meta data

The meta data is grouped in blocks.

e.g.

Path	
Constant	Value
<input checked="" type="checkbox"/>	#DATEYYYY#
<input checked="" type="checkbox"/>	\
<input checked="" type="checkbox"/>	#DATEMM#
<input checked="" type="checkbox"/>	\
<input checked="" type="checkbox"/>	#DATEDD#

In most blocks, a concatenation is performed when you define more than one row in a grid.

Add Add one row in the grid
 Up Move focused row up in the grid
 Down Move focused row down in the grid
 Delete Remove focused row from the grid

It's possible to use tags as constants.

#DATE_NOW#	Current date in yyyy-MM-dd HH:mm:ss format (*)
#DATE#	Current date in yyyy-MM-dd format (*)
#YYYY#	Current date in yyyy format (*)
#YY#	Current date in yy format (*)
#MM#	Current date in MM format (*)
#MMM#	Current date in MMM format (*)
#MMMM#	Current date in MMMM format (*)
#DD#	Current date in dd format (*)
#DDD#	Current date in ddd format (*)
#DDDD#	Current date in dddd format (*)
#LANGCODE#	Language code of the logged in user
#USER_LOGIN#	Account name of the logged in user
#USER_GROUPS#	Groups of the logged in user
#USER_ROLES#	Roles of the logged in user

(*) Date formats:

Format specifier	Description	Examples (English notation)
"dd"	The day of the month, from 01 through 31.	6/1/2009 1:45:30 PM -> 01
"ddd"	The abbreviated name of the day of the week.	6/15/2009 1:45:30 PM -> Mon (en-US)

"dddd"	The full name of the day of the week.	6/15/2009 1:45:30 PM -> Monday (en-US)
"HH"	The hour, using a 24-hour clock from 00 to 23.	6/15/2009 1:45:30 AM -> 01 6/15/2009 1:45:30 PM -> 13
"mm"	The minute, from 00 through 59.	6/15/2009 1:09:30 AM -> 09 6/15/2009 1:09:30 PM -> 09
"MM"	The month, from 01 through 12.	6/15/2009 1:45:30 PM -> 06
"MMM"	The abbreviated name of the month.	6/15/2009 1:45:30 PM -> Jun (en-US)
"MMMM"	The full name of the month.	6/15/2009 1:45:30 PM -> June (en-US)
"ss"	The second, from 00 through 59.	6/15/2009 1:45:09 PM -> 09
"yy"	The year, from 00 to 99.	1/1/0001 12:00:00 AM -> 01 1/1/0900 12:00:00 AM -> 00 1/1/1900 12:00:00 AM -> 00 6/15/2009 1:45:30 PM -> 09
"yyyy"	The year as a four-digit number.	1/1/0001 12:00:00 AM -> 0001 1/1/0900 12:00:00 AM -> 0900 1/1/1900 12:00:00 AM -> 1900 6/15/2009 1:45:30 PM -> 2009

Note: abbreviations and full names are culture depended

Note: format specifier is case sensitive

5 Import / Export

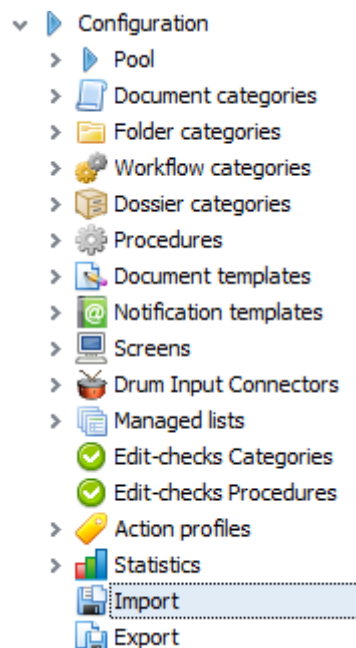
The Import/Export does allow you to create an Input Connector on your system, export it to a zip file and import it on another Doma environment.

A detailed description of Import/Export is not in the scope of this document. More information can be found in document “Doma 6 – Application Administrator Manual – 99 – Import Export & Solutions”.

5.1 Import from zip file

- Start the Doma admin module.
- Open the item “**Configuration**” in the navigation tree.
- Double-click the item “**Import**”.

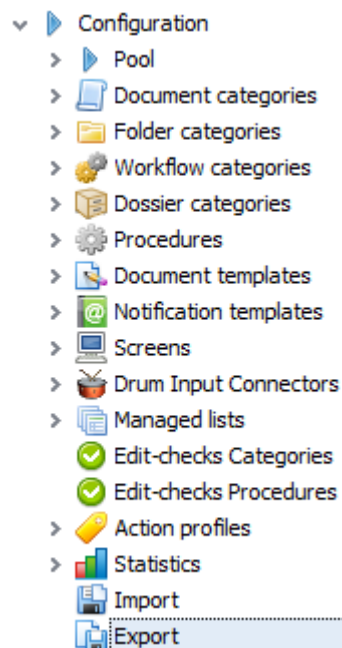
An import wizard starts up.
Follow the steps.



5.2 Export to zip file

- Start the Doma admin module.
- Open the item “**Configuration**” in the navigation tree.
- Double-click the item “**Export**”.

An export wizard starts up.
In the “Type of configuration” step, select “Drum Input connectors”. In the next step, you can select the Input Connectors. Follow the steps.



6 Solution

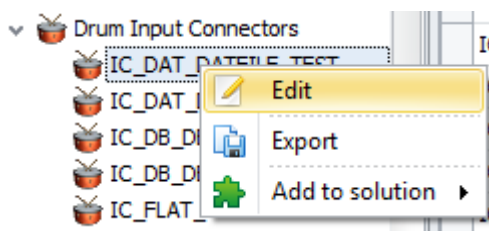
An Input Connector can be linked to a solution. A solution contains several configurations (category, procedure, Drum Input Connectors, etc.) for one project.

A detailed description of a solution is not in the scope of this document. More information can be found in document “Doma 6 – Application Administrator Manual – 99 – Import Export & Solutions”.

If you have defined one or more solutions, you can add an Input Connector to a solution or remove an Input Connector from a solution.

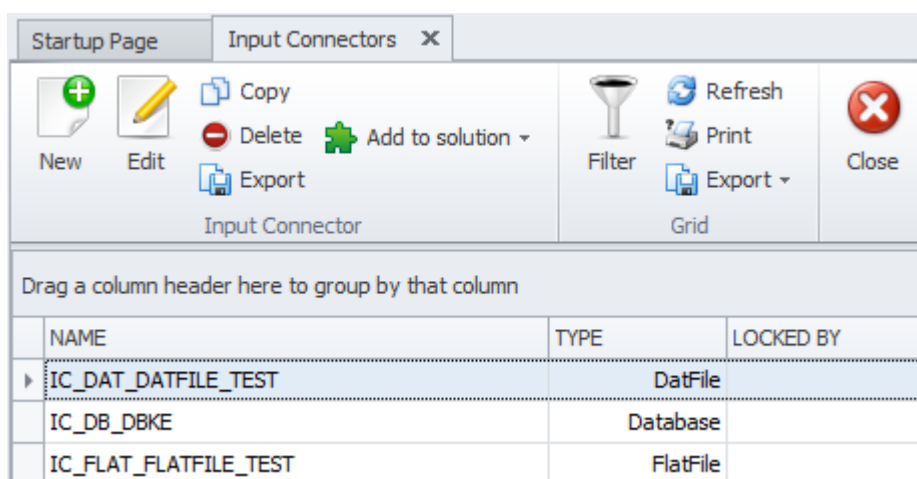
6.1 How to add an input Connector to a solution

- Start the Doma admin module.
- Open the item “**Configuration**” in the navigation tree.
- Expand the item “**Drum Input Connectors**” of the navigation tree.
- Put the cursor on one of the Drum Input Connectors items.



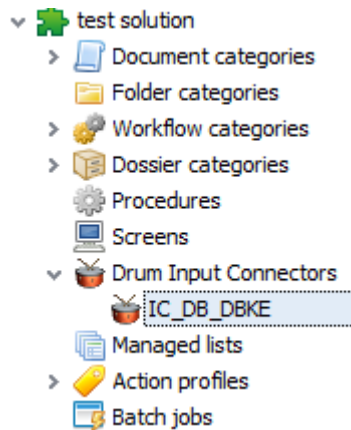
- Click on the right mouse button - a context menu appears.
- Select the option “**Add to solution**”.

Or open the list of Drum Input Connectors (“Open” in context menu on “Drum Input Connectors” item)



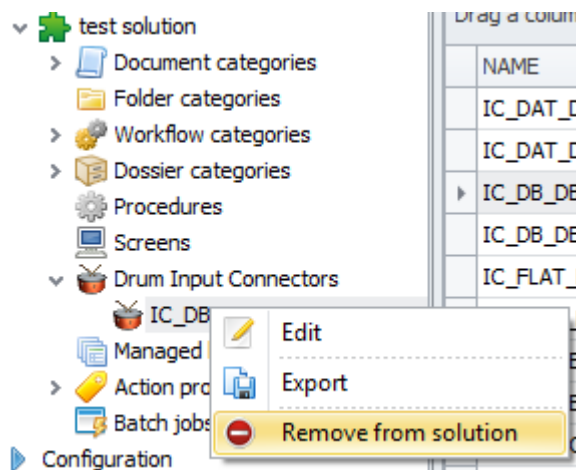
A tab with an overview of all existing input connectors now appears. Click on the “Add to solution” icon in the toolbar or click on the “Add to solution” icon in the context menu of the grid.

e.g. Result in the Solutions tree:



6.2 How to remove an Input Connector from a solution

- Start the Doma admin module.
- Open the item “**Solutions**” in the navigation tree.
- Expand one of the solution items of the navigation tree.
- Expand the item “Drum Input Connectors” of the navigation tree.
- Put the cursor on one of the Drum Input Connectors items.



- Click on the right mouse button - a context menu appears.
- Select the option “**Remove from solution**”.