Arco

Doma 6
Application administrator manual
09. Messages and E-mail

A new era in document management.

Doma 6

Application administrator manual
09. Messages and E-mail

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Author: Arco R&D - Kathleen Van de Weyer

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Contents

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1   Messages and Emails

1.1   Introduction

Doma allows users to **send** *messages* and *E-mails*.
Next to that, *E-mails* can also easily be **added** to the system. This can be done manually or automatically.

1.1.1   Messages and E-mails

The Doma application provides several messages and E-mail options.

Messages are communication within the Doma system itself. They can be sent to other Doma users, who will receive the messages in the *Mail* part of the Doma WebInterface.

E-mails can be sent if the Doma system is linked to an SMTP server.

Users can *manually* send messages and E-mails from:

- a document detail window
- a folder detail window
- a workflow category detail window
- a dossier detail window
- a step detail window

Messages and E-mails can also be sent in an *automatic* way. In that case, the message will be based on a notification template and will be sent on a certain pre-defined event or action.

1.1.2   E-mail notifications

The system can also send notification E-mails to users when they have subscribed to a folder or a saved query. Every time a new item is added to the folder or when a new item is found by the saved query, the system will send a notification mail to the user.

An e-mail notification can also be sent on a certain pre-defined event or action.
For more information about Event actions and User events, please see document "Doma 6 – Application Administrator Manual – 11 – Events and Actions".

These actions are available for a procedure:

- Send a notification to an assignee
- Send notification to a mailinglist
- Send notification to the case creator
- Send notification to the worklist

These actions are available for a category:

- Send a notification to an assignee
- Send notification to the case creator

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1.1.3 Saving E-mails to Doma

E-mails can be saved to Doma in several ways:
1. Manually, using the Doma WebInterface.
2. Manually, using the Doma Explorer, this will create a MSG file, not an e-mail object.
3. Automatically, using a pre-defined mailbox in combination with the Doma DRUM module, which will automatically upload all mails that were sent to the mailbox.

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1.2 Messages in the Doma WebInterface

Messages overview

1.2.1 Doma navigation bar – item Mail

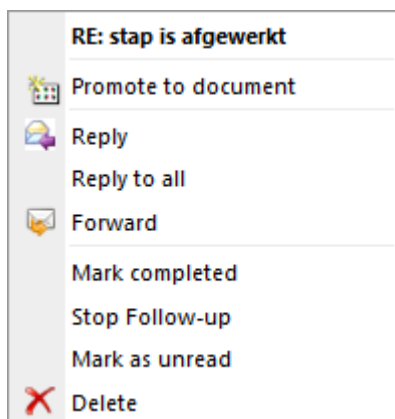#### 1.2.1.1 Inbox
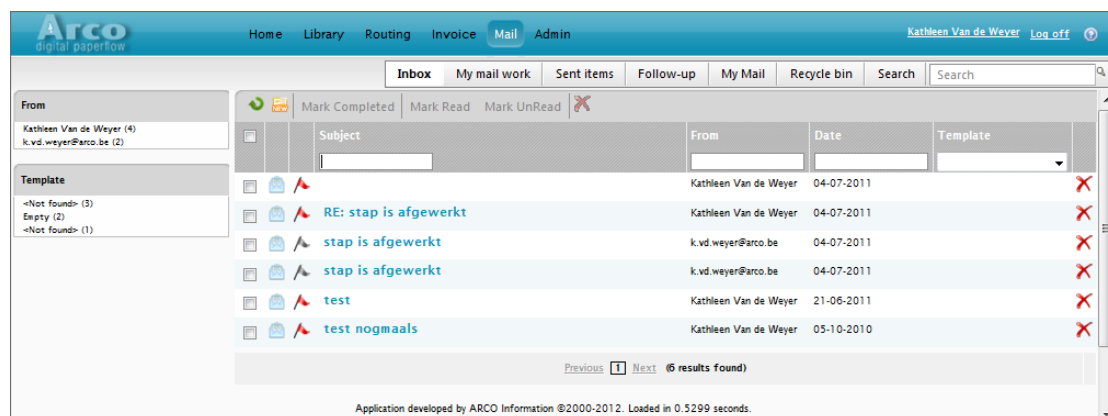
This list contains all received e-mails.

Toolbar

Icon	Action	Description
	Refresh	Refresh list
	Toggle What's new	Toggle What's new
Mark Completed (*)	Mark completed	Mark selected e-mails as "Completed"
Mark Read (*)	Mark read	Mark selected e-mails as "Read"
Mark Unread (*)	Mark unread	Mark selected e-mails as "Unread"
(*)	Delete	Delete selected e-mails

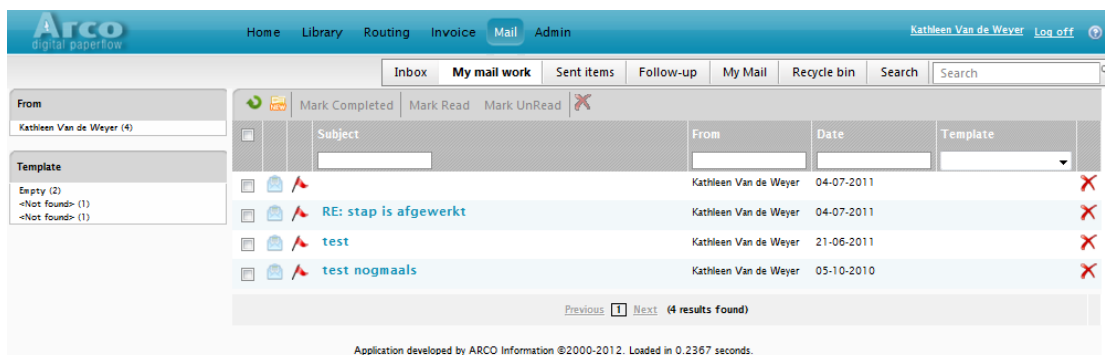*(*) Only available when at least one e-mail has been selected.*

Columns

Column	Description
Selection	Checkbox. Toolbar icons become enabled when at least one e-mail has been selected.
Read	Open envelop: e-mail message has been read Closed envelop: e-mail message has not been read yet
Tracking	Red flag: Tracked Grey flag: Not tracked
Subject	Subject of the e-mail message
From	Sender of the e-mail message
Date	Send date of the e-mail message
Template	Notification template
Delete	Delete e-mail message

Context menu – e-mail message

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- Subject of the e-mail message: open e-mail message
- Promote to document: will change the mail object to a document category.
- Reply: send reply to sender
- Reply to all: send reply to all
- Forward: forward this e-mail message
- Mark completed: Mark e-mail as "Completed" (Option is only available when the e-mail is not completed – tracking will be ended when marked completed.)
- Stop Follow-up (*): stop tracking (not available for non-tracked e-mail messages)
- Mark as read/unread: Mark e-mail as "Read"/"Unread"
- Delete: delete e-mail from the selected list..

1.2.1.2   My mail work

This list contains all received non-closed follow-up e-mails. Same functionalities as explained in previous chapter.

1.2.1.3   Sent items
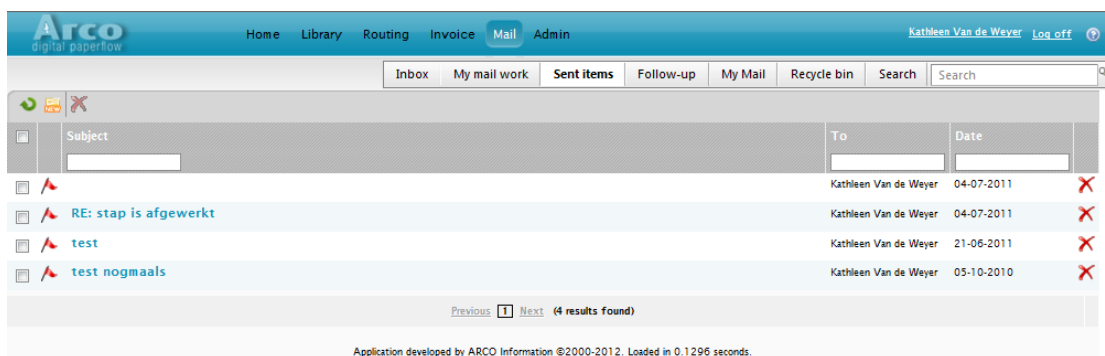
This list contains all sent e-mails.

Toolbar

Icon	Action	Description
	Refresh	Refresh list
	Toggle What's new	Toggle What's new

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	Delete	Delete selected e-mails
(*)		

(*) Only available when at least one e-mail has been selected.

Columns

Column	Description
Selection	Checkbox. Toolbar icons become enabled when at least one e-mail has been selected.
Tracking	Red flag: Tracked Grey flag: Not tracked
Subject	Subject of the e-mail message
To	Receiver of the e-mail message
Date	Send date of the e-mail message
Delete	Delete e-mail message

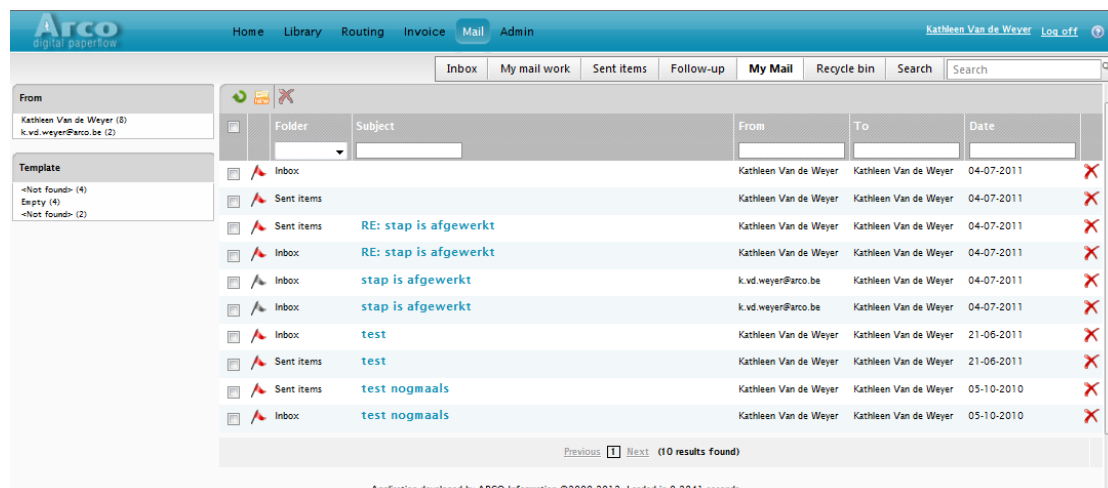**Context menu – e-mail message**

-   Subject of the e-mail message: open e-mail message
-   Promote to document: will change the mail object to a document category.
-   Reply: send reply to sender
-   Reply to all: send reply to all
-   Forward: forward this e-mail message
-   Mark completed: Mark e-mail as "Completed"
-   Stop Follow-up: stop tracking
-   Mark as read/unread: Mark e-mail as "Read"/"Unread"
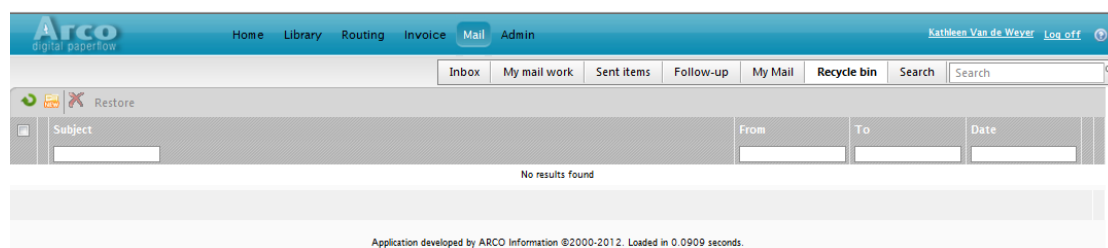-   Delete: delete e-mail

1.2.1.4   Follow-up
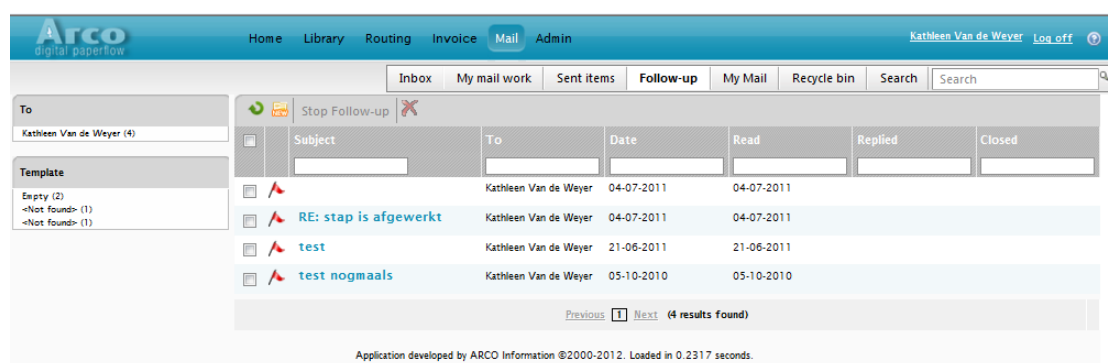
This list contains all sent follow-up e-mails. Same functionalities as explained in previous chapter. (Closed e-mails remain in the list.)

1.2.1.5   My Mail

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This list contains all e-mails sent and received by your user. Same functionalities as explained in previous chapters (Inbox and Sent items)

1.2.1.6 Recycle bin

This list contains all deleted e-mails which are not yet definitely deleted. Use this list if you want to restore one or more deleted e-mails.
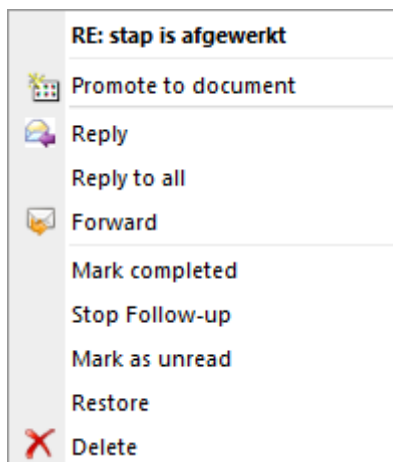
Toolbar

Icon	Action	Description
	Refresh	Refresh list
	Toggle What's new	Toggle What's new
(*)	Delete	Delete selected e-mails definitely
Restore (*)	Restore	Restore e-mail

(*) Only available when at least one e-mail has been selected.

Columns

Column	Description
Selection	Checkbox. Toolbar icons become enabled when at least one e-mail has been selected.
Tracking	Red flag: Tracked Grey flag: Not tracked
Subject	Subject of the e-mail message
From	Sender of the e-mail message
To	Receiver of the e-mail message
Date	Send date of the e-mail message
Restore	Restore e-mail message
Delete	Delete e-mail message definitely

Context menu – e-mail message

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RE: stap is afgewerkt	- Subject of the e-mail message: open e-mail message
Promote to document	- Promote to document: will change the mail object to a document category.
Reply	- Reply: send reply to sender
Reply to all	- Reply to all: send reply to all
Forward	- Forward: forward this e-mail message
Mark completed	- Mark completed (*): Mark e-mail as "Completed"
Stop Follow-up	- Stop Follow-up (*): stop tracking
Mark as unread	- Mark as unread: Mark e-mail as "Unread"
Restore	- Restore: restore e-mail
Delete	- Delete: delete e-mail definitely

1.2.1.7 Search
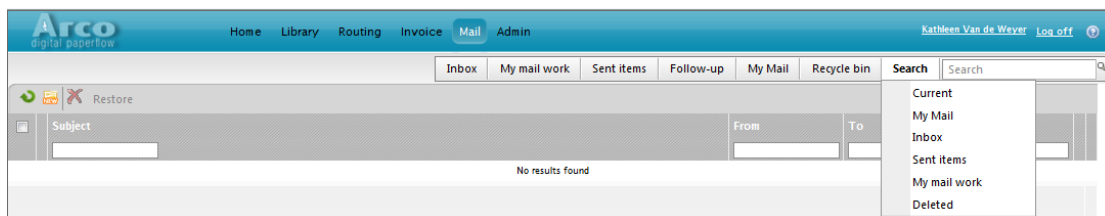
A global search is performed on the chosen category (Current, My Mail, Inbox, …)

Enter a search string and press "Find" button.
The same result screen with the same functionalities is displayed as explained in previous chapters.

Count button

Enter a search string and press "Count" button.
The number of found items is displayed in the title.

Save button

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Open button

Query is immediately executed after clicking on one of the saved queries.

1.2.2 Prerequisites to send messages

- The button *Add Message* ✉ must be available in the detail screen toolbar. (It is available in the default detail windows, but can be removed from it when using a custom screen.)
- User must have sufficient ACL rights. (security action **Add comments** must be enabled for the user.)

1.2.3 Send a message from the detail window of a Doma item

- Click on the icon *Add message* ✉ in the toolbar:

- The message screen pops up:
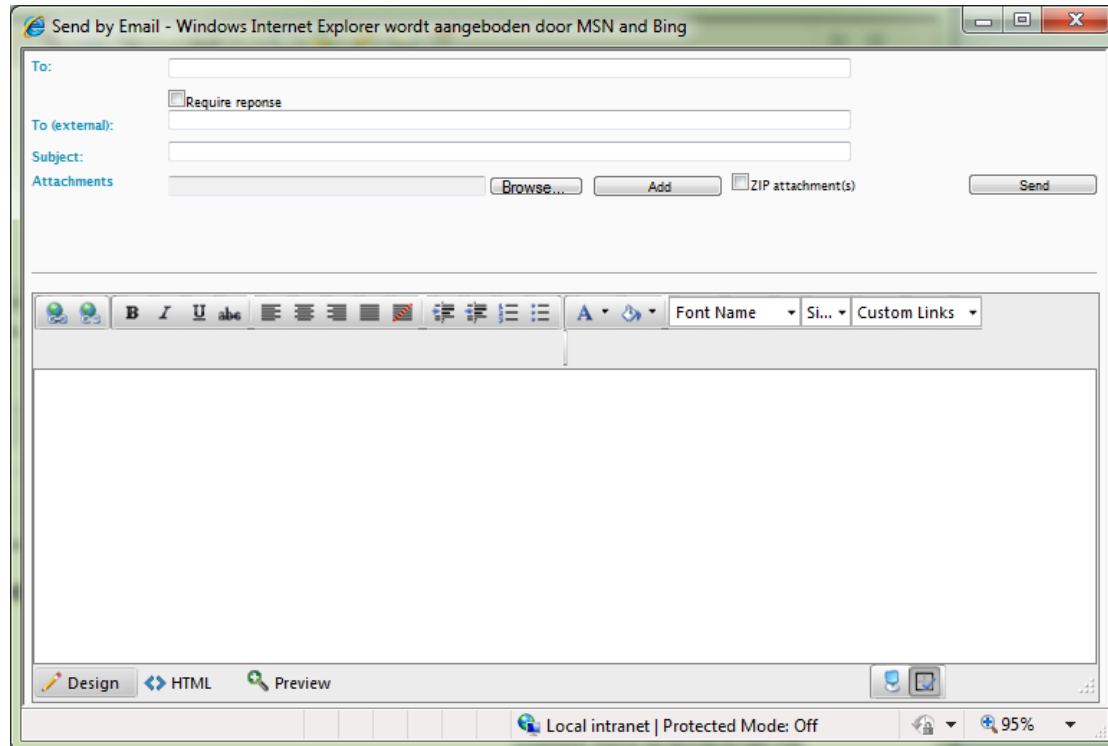
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Define your message and send it. The message is sent to the selected correspondent(s).
It appears in the correspondent's Mail menu-items *Inbox*, *My mail work* and *My Mail*.
It also appears in the Mail menu-items *Sent items*, *Follow-up* and *My Mail* of the user who has sent the message.
The message can also be visualized from the detail screen of the item from where it has been sent. (See below)

1.2.4   View all messages sent from the detail window of a Doma item

To view all messages that were sent from the detail screen of an item, click on the icon
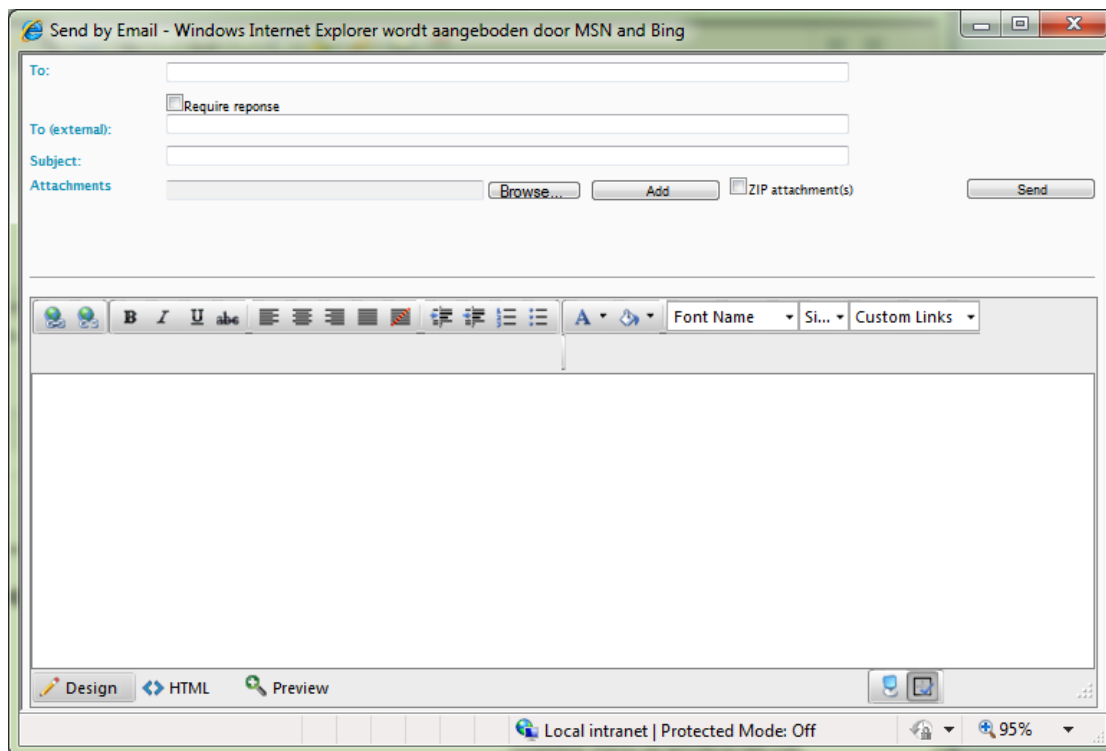*Messages* in the toolbar:
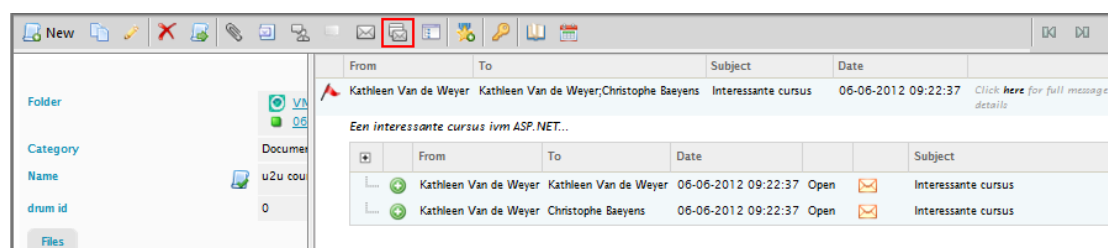
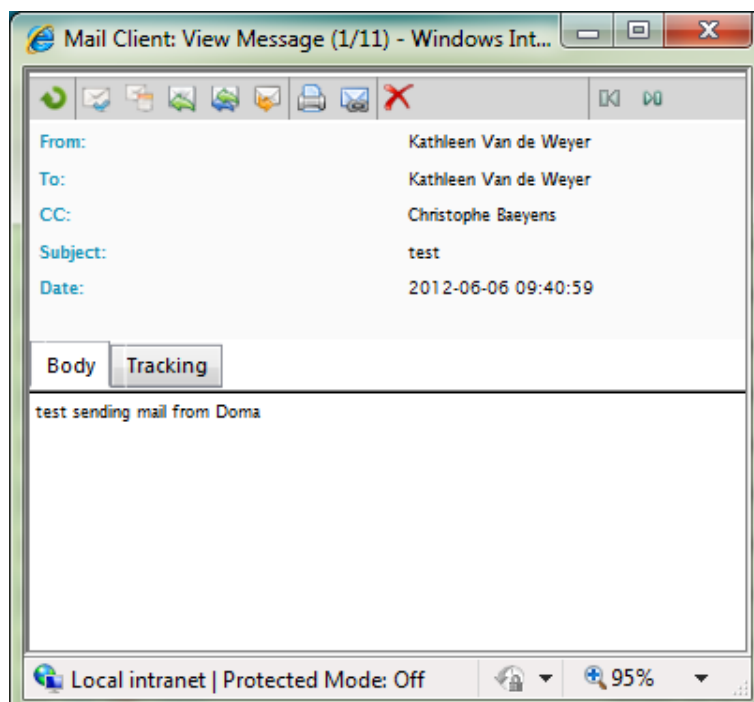### 1.2.5   Send mail from a detail window of a Doma item

- Click on the icon *Add mail* in the toolbar:

- The message screen pops up:

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Require response: When checked, the message will appear in the list My Mail Work.

1.2.6   Message detail

Open one of the e-mail messages.

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Toolbar

Icon	Action	Description
	Refresh	Refresh detail
	Mark completed	Mark e-mail message as "Completed"
	Stop Follow-Up	Stop tracking
	Reply	Send a message to the sender
	Reply to all	Send a message to all recipients of the e-mail message
	Forward	Send a message to a new recipient
	Print	Print e-mail message
	Link	Open linked object in a popup screen
	Delete	Delete e-mail

"Reply", "Reply to all" and "Forward" behave like a standard e-mail program.

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1.3   Notification templates – configuration

Notification templates are created and managed in the DomaAdmin module.

Start the DomaAdmin module and select the item **Notification templates** in the part **Configuration** of the navigation tree.
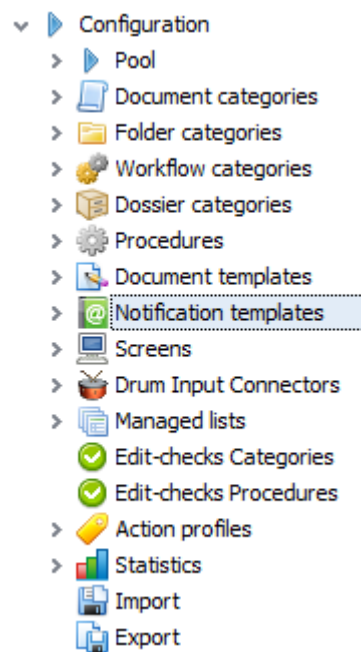
Click on the right mouse button. A menu appears:
- Select the option **New** to create a new Notification template. A new configuration screen will appear.
- Select the option **Open** to open the list of existing Notification templates. The list of existing notification templates will appear. From here you can edit, create or delete notification templates.
- Select the option **Refresh** to open the list of existing notification templates as sub items in the navigation tree.

1.3.1   Create a notification template

1. Start the DomaAdmin module and select the item **Notification templates** in the part **Configuration** of the navigation tree.
2. Click on the right mouse button. A menu appears: select the option "**New**" to create a new Notification template.
   OR
   Select the option **Open** to open the list of existing Notification templates. Click on the button "**New**" in the toolbar above the list.
3. A new configuration screen will appear.

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4. Enter data and press Save button.

1.3.1.1 Tab Notification template

Here you define the functioning of the notification template.

Field	Description
Name	Name of the notification template
ID	Identifier of the notification template for internal use only. This ID is automatically generated when saving this tempale.
Description	Description of the notification template
Attachments	Packages. OBSOLETE. At this moment, not used.

1.3.1.1.1 Options

Tracking
☑ Enable tracking. Set **Archive** to **True**, otherwise it will not work.
   The tracking will show an overview of all actions done on the mail. (Email detail window)
☐ Disable tracking

Allow external recipients
☑ User can send messages to external recipients (external to Doma)
   Set **Archive** to **True**, otherwise it will not work.
☐ User can send messages only to users of Doma

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Allow CC
- ☑ User can Add Cc recipients to the message
  Set **Archive** to **True**, otherwise it will not work.
- ☐ User can't add Cc recipients

Allow BCC
- ☑ User can add Bcc recipients to the message
  Set **Archive** to **True**, otherwise it will not work.
- ☐ User can't add Bcc recipients

Allow attachments
- ☑ User can add attachments to the message
  Set **Archive** to **True**, otherwise it will not work.
- ☐ User can't add attachments

Response required
- ☑ Receiver has to respond to the message
  Set **Archive** to **True**, otherwise it will not work.
- ☐ Reciever doesn't have to respond to the message

Allow reply
- ☑ User can reply this message to the sender
  Set **Archive** to **True**, otherwise it will not work.
- ☐ User cannot reply this message

Allow forward
- ☑ User can forward this message to another recipient
  Set **Archive** to **True**, otherwise it will not work.
- ☐ User cannot forward this message

Send notification
- ☑ Send e-mail notification
  "A new message was sent to you by UserX.
  Click here to view the message."
  "here" is a hyperlink to the message in Doma.
  Set **Archive** to **True**, otherwise it will not work.
- ☐ ❑ Don't send e-mail notification.

Archive
- ☑ Message will be stored in DocRoom.
- ☐ Message will not be stored in DocRoom and is only sent via the mail server. There will be no trace.

Show full tracking
- ☑ Show all tracking audit: complete mail chain is shown.
  Set **Archive** to **True**, otherwise it will not work.
- ☐ Not all tracking audit is shown: only that part from which your user was involved.

Body is HTML
- ☑ Body contains HTML syntax
- ☐ Body contains plain text

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1.3.1.2 Tab Content Default

Field	Description
Subject	E-mail subject
Body	E-mail body, this body can be modified by the user when sending a message/e-mail from Doma Webinterface.
	Body is Html? Yes — Enter plain text with html tags and doma tags. Don't forget to use for each carriage return line feed. For a preview, press this button:
	Body is Html? No — Enter plain text with doma tags
Fixed body	E-mail body, this body cannot be modified by the user when sending a message/e-mail from Doma Webinterface.
	Body is Html? Yes — Enter plain text with html tags and doma tags. Don't forget to use for each carriage return line feed. For a preview, press this button:
	Body is Html? No — Enter plain text with doma tags

It's possible to use the content of an object/workflow property. Use the syntax **[@*propertyname*@]**.

1.3.1.2.1 Html tags

Some examples of frequently used tags:

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Html tag	Description
 	Carriage return line feed
 and 	Put text between and in bold
<i> and </i>	Put text between <i> and </i> in italic
Text	Create hyperlink
<table border=0> <tr><th>Header1</th> <th>Header2</th></tr> <tr><td>Cell1</td><td>Cell2</td></tr> </table>	<table></table> Table <tr></tr> Row within table <th></th> Header <td></td> Cell
	Horizontal line
text	Font size
   - Text1 - Text2 	List

e.g.

```
Welcome!<br/>
This is an <b>example</b> how to use <i>html tags</i><br/>
<br/>
<a href="http:\\www.arco.be">Arco Website</a><br/>
<br/>
<table border=0>
 <tr><th>Name</th>   <th>Description</th></tr>
 <tr><td>Renault</td><td>Nice car</td></tr>
 <tr><td>Fiat</td>   <td>Small car</td></tr>
 <tr><td>Ferrari</td><td>Fast car</td></tr>
</table><br/>
<hr/>
<font size=15>Hello world!</font><br/>
<br/>
<ul
 <li>Black</li>
 <li>White</li>
 <li>Red</li>
 <li>Green</li>
 <li>Yellow</li>
</ul>
```

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Welcome!
This is an **example** how to use *html tags*

Arco Website

Name Description
Renault Nice car

Fiat Small car

Ferrari Fast car

Hello world!

- Black
- White
- Red
- Green
- Yellow

1.3.1.2.2 Doma tags

Doma tags are parsed at the moment the notification message/e-mail is made.

You can use the doma tags in the Help dock panel. Click in the area where you want to add the Doma tag. Double-click the doma tag for inserting this tag to the cursor position.

Workflow tag	Description
#TECH_ID#	Workflow Unique ID
#CASE_ID#	Workflow ID
#CASE_NAME#	Workflow name
#CASE_DESCRIPTION#	Workflow description
#CASE_LISTINFO#	Extra field 1 (see configuration Procedure, field List info)
#CASE_LISTINFO2#	Extra field 2 (see configuration Procedure, field List info)
#CASE_LISTINFO3#	Extra field 3 (see configuration Procedure, field List info)
#USER_STARTER#	Workflow starter
#USER_STEPEXECUTOR#	Step executor
#STEP_NAME#	Step nam
#PROC_NAME#	Procedure name
#CASE_START#	Workflow start date
#CASE_DUE#	Workflow due date
#STEP_START#	Step start date
#STEP_DUE#	Step due date
#ENCRYPTEDURL#	Workflow encrypted URL
#ENCRYPTEDURLEDIT#	= #ENCRYPTEDURL#

Object tag	Description
#OBJ_ID#	Object Unique ID
#OBJ_DIN#	Object DIN
#PARENT_OBJ_ID#	Parent unique ID
#CAT_ID#	Category ID

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#CASE_ID#	Workflow ID (if applicable)
#OBJ_NAME#	Object name
#CREATED_BY#	Created by
#PARENT_NAME#	Parent name
#PARENT_PATH#	Parent path
#FOLDER_NAME#	Folder name
#FOLDER_PATH#	Folder path
#ENCRYPTEDURL#	Object encrypted URL
#ENCRYPTEDURLEDIT#	Object encrypted URL edit mode

Other tag	Description
#DATE_NOW#	Current date time (e.g. 2012-06-07 10:40:20)
#DATE#	Current date (e.g. 2012-06-07)
#YYYY#	Current year in 4 digits (e.g. 2012)
#YY#	Current year in 2 digits (e.g. 12)
#MM#	Current month in 2 digits (e.g. 06)
#MMM#	Current month as text, abbreviation (e.g. Jun)
#MMMM#	Current month as text, full (e.g. June)
#DD#	Current day in 2 digits (e.g. 07)
#DDD#	Current weekday as text, abbreviation (e.g. Thu)
#DDDD#	Current weekday as text, full (e.g. Thursday)

1.3.1.3   Tabs Content English, Content French, Content Dutch, Content German

One or more tabs have to be filled in when you want to create language dependent content. If not filled in, the default is used.
Please see previous chapter for information about the fields in these tabs.

1.3.1.4   Tab Attachments

Notification template	Drag a column header here to group by that column		
Content Default	SEND METHOD	ITEM TYPE	PUBLISH DAYS
Content English	Attach	MainFile	0
Content French	▶ Link	AllFiles	0
Content Dutch			
Content German			
Attachments			

The attachments to be included in the notification e-mail.
ITEM TYPE: type of attachment
SEND METHOD:
      Attach : send fysical file
      Link : link to the file (receiver must have sufficient rights to view this file)
      PublishedLink : A link to the file will be generated, but the link is only accessible for X days. The number of days can be entered in column PUBLISH DAYS. (receiver don't have to have sufficient rights to view this file).

1.3.2   Disable notifications

Each user can disable one or more e-mail notifications (e.g. before he/she goes on holiday) in the user preferences in Doma Webinterface.

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1.4 Subscriptions

1.4.1 Introduction

Doma WebInterface users can subscribe to folders or saved queries. Next to this option, Doma application administrators can define a mandatory subscription.

When Doma WebInterface users subscribe, they will receive a mail message that is sent by the Doma application.
This message contains a list of the new items of the folder they subscribed to, or it contains the result of the saved query that has been executed.
By default, they will get a pre-defined message in one language, but application administrators can create custom messages per language.

When Doma application administrators define a mandatory description, they decide which Doma users will receive the messages. This way they can enforce that users are automatically informed about certain Doma content.

1.4.2 Configuration of custom subscription messages

To allow users to subscribe to certain items and receive a message in their own language, the next steps have to be done:

1. Create one or more subscription messages by defining a new screen.
2. Edit the content of these messages in the xml file definition.
3. Link the xml files to the correct language.

If these steps are not done, a default message will be sent.

1.4.2.1 Create subscription message

1. Open the **DomaAdmin** module.

2. Select the item **Screens** in the **Configuration** part of the navigation tree.

3. Click on the **right mouse button**. A context menu appears. Select **New**.
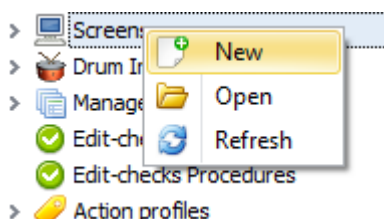
4. A new **configuration tab** with the name **New Screen** appears.

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5. Configure a new subscription screen by entering the next values:

   a. **Name** = Subscription_E (This will be the message in English)

   b. **Screen mode** = SUBSCRIPTION

6. Then click on the **Save** button in the toolbar.

7. After save, the **Screen source** field appears: this field shows the name and the location of the xml file that is used to create the subscription message. This xml file contains the default message that is sent to the users who have subscribed.

The number mentioned in this field is also used to refer to this file when it is linked to a certain language in the ArcoInfo parameters, see chapter Link the xml file to the correct language.

8. Click on the **Save & close** button in the toolbar.

9. Repeat this action for Dutch (Subscription_D), French (Subscription_F) and German (Subscription_G) messages if you also want to provide subscription mail messages in these languages.

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1.4.2.2 Edit content of the message in the xml file

Open the screen source xml file of which you see the location in the screen configuration tab of the item in the DomaAdmin module.

The default values of the XML file appear:

```
<font face=Verdana>

[HEADER_BEGIN]
[USER_DISPLAY_NAME],<br><br>
You receive this e-mail because you are subscribed to one or more subscriptions.<br>
[HEADER_END]

<b>[SUBSCRIPTION]</b>.<br>
Number of documents: [NUMBEROFDOCS].<br><br>
<TABLE border=0>

<TR><TD> </TD><TD> </TD><TD><b>Document</b></TD><TD><b>Date</b></TD><TD><b>Main
File</b></TD></TR>

[DOCUMENTLIST_NEW_BEGIN]
<TR><TD align=right>[SEQNO].</TD><TD><small><i>[OBJECT_TYPE]</small></i></TD><TD>[TITLE]
=> [FOLDER]</TD><TD>[DATE]</TD><TD>[MAINFILE]</TD></TR>
[FILELIST_BEGIN]
<TR><TD> </TD><TD align=right>[SEQNO].</TD><TD colspan=3>[FILE]</TD></TR>
[FILELIST_END]
[DOCUMENTLIST_NEW_END]

[DOCUMENTLIST_MODIFIED_BEGIN]
<TR><TD align=right>[SEQNO].</TD><TD><small><i>[OBJECT_TYPE]</small></i></TD><TD>[TITLE]
=> [FOLDER]</TD><TD>[DATE]</TD><TD>[MAINFILE]</TD></TR>
[FILELIST_BEGIN]
<TR><TD> </TD><TD align=right>[SEQNO].</TD><TD colspan=3>[FILE]</TD></TR>
[FILELIST_END]
[DOCUMENTLIST_MODIFIED_END]

[WORKLIST_BEGIN]
<TR><TD align=right>[SEQNO].</TD>
   <TD><small><i>[CASE_NAME]</small></i></TD>
   <TD>[PROC_NAME] - [STEP_NAME]</TD>
   <TD>[CASE_DATESTART]</TD>
   <TD>[URL]</TD></TR>
[WORKLIST_END]

</TABLE><br><br>

[FOOTER_BEGIN]
<b>This is an automated e-mail. Please do not reply to this e-mail.</b>
[FOOTER_END]

</font>
```

1.4.2.2.1 List of placeholders that can be used in the xml file mentioned above

Following placeholders can be used in the screen:

Header
> [HEADER_BEGIN] *plain text and one or more of the indented fields* [HEADER_END]
>> [USER_DISPLAY_NAME]
>> [USER_DESC]

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[USER_LOGIN]
[USER_MAIL]

User

[USER_DISPLAY_NAME]
[USER_DESC]
[USER_LOGIN]
[USER_MAIL]

Subscription

[NUMBEROFDOCS]
[SUBSCRIPTION]
[ROUTINGURL]   only with Routing1, Routing2 and Routing3 subscriptions

Documents

[DOCUMENTLIST_NEW_BEGIN] *plain text and one or more of the indented fields*
[DOCUMENTLIST_NEW_END]

[SEQNO]
[DIN]
[TITLE]
[TITLE_NOLINK]
[DATE]
[MAINFILE]
[OBJECT_TYPE]
[PARENT]
[FOLDER]
[FILELIST_BEGIN] *plain text and one or more of the indented fields*
[FILELIST_END]

[SEQNO]
[FILE]

[DOCUMENTLIST_MODIFIED_BEGIN] *plain text and one or more of the indented fields* [DOCUMENTLIST_MODIFIED_END]

[SEQNO]
[DIN]
[TITLE]
[TITLE_NOLINK]
[DATE]
[MAINFILE]
[OBJECT_TYPE]
[PARENT]
[FOLDER]
[FILELIST_BEGIN] *plain text and one or more of the indented fields*
[FILELIST_END]

[SEQNO]
[FILE]

Work item

[WORKLIST_BEGIN] *plain text and one or more of the indented fields*
[WORKLIST_END]

[SEQNO]
[CASE_DATESTART]
[CASE_DUEDATE]
[CASE_ID]
[CASE_NAME]
[LISTINFO]
[LISTINFO2]
[LISTINFO3]
[PROC_NAME]
[STEP_DUEDATE]

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```
[STEP_NAME]
[TECH_ID]
[URL]
```

Footer

```
[FOOTER_BEGIN] ... [FOOTER_END]
```

1.4.2.3 Link the xml file to the correct language

1. Open the **DomaAdmin** module.

2. Select the item **ArcoInfo parameters** in the **Settings** part of the navigation tree.
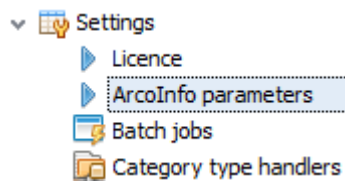
3. Double click on this item to open all parameters in the screen **ArcoInfo parameters**.

4. Go to the next parameter:

    a. APPLICATION: ArcoRoutingEngine

    b. CATEGORY: Subscriptions

    c. ScreenID_E

5. Double-click on this item to enable edit.

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6. Enter the number **4200** in the **Parameter Value**. (This number is the screen ID, see chapter *Create subscription message*.)

7. Click on the **Save** button in the toolbar.

1.4.3   Batch Job

A Doma batch job handles the sending of the subscription messages:

NAME	INTERVAL	ERROR	LAST DATE	NEXT DATE	ST...	SERVER
∨ ASSEMBLY: Arco.Doma.Library						
Analyse Oracle indexes	Every week on Saturday at 20:00 (WD6T20:00)		2012-06-05 08:06:25	2012-06-16 20:00:00	🟩	
Calculate Object Content	Every 5 minute(s)		2012-06-06 14:48:24	2012-06-06 14:53:24	🟩	
Calculate Statistics	Every day at 19:00 (DT19:00)		2012-06-05 08:05:28	2012-06-06 19:00:00	🟩	
Check Cases for Asynchronous Release	Every 60 minute(s)		2012-06-06 14:19:46	2012-06-06 15:19:46	🟩	
Check Expired Cases	Every 60 minute(s)		2012-06-06 14:19:46	2012-06-06 15:19:46	🟩	
Check Suspended Cases	Every 60 minute(s)		2012-06-06 14:19:47	2012-06-06 15:19:47	🟩	
Check triggers	Every 1 minute(s)		2012-06-06 14:49:24	2012-06-06 14:50:24	🟩	
Collect Files From OCR	Every 10 minute(s)		2012-06-06 14:39:52	2012-06-06 14:49:52	🟩	
Collect files from editing	Every 5 minute(s)		2012-06-06 14:44:53	2012-06-06 14:49:53	🟩	
Collect files prepared for indexing	Every 10 minute(s)		2012-06-06 14:39:52	2012-06-06 14:49:52	🟩	
Collect files prepared for reIndexing	Every 10 minute(s)		2012-06-06 14:39:52	2012-06-06 14:49:52	🟩	
Empty entire recyclebin	Every week on Saturday at 20:00 (WD6T20:00)		2012-06-05 08:05:43	2012-06-16 20:00:00	🟩	
Expire Objects	Every 60 minute(s)		2012-06-06 14:19:47	2012-06-06 15:19:47	🟩	
Logoff idle Users	Every 5 minute(s)		2012-06-06 14:45:23	2012-06-06 14:50:23	🟩	
Resend Error Messages	Every 720 minute(s)		2012-06-06 08:18:29	2012-06-06 20:18:29	🟩	
Run Oracle fulltext synchro	Every 1 minute(s)		2012-06-06 14:48:54	2012-06-06 14:49:54	🟩	
Send Files To OCR	Every 10 minute(s)		2012-06-06 14:39:52	2012-06-06 14:49:52	🟩	
Send Notifications	Every 5 minute(s)		2012-06-06 14:45:23	2012-06-06 14:50:23	🟩	
Send subscriptions	Every 10 minute(s)		2010-10-25 13:05:32	2010-10-25 13:15:32	🟥	
Update Counters	Every 5 minute(s)		2012-06-06 14:48:54	2012-06-06 14:53:54	🟩	
Validate Indexes	Every 5 minute(s)		2012-06-06 14:48:54	2012-06-06 14:53:54	🟩	

[ASSEMBLY] = 'Arco.Doma.Library'

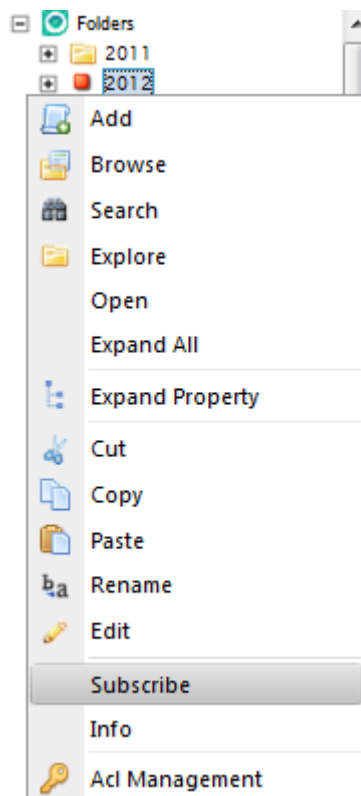This batch job has to run at least once a day.

> **Mind!**
>
> **If you want the mails to be sent every day, you have to schedule the task in the evening and not in the morning, otherwise the documents of the day before won't be selected.**

1.4.4   Users and subscriptions

Overview of all user actions for subscriptions in the DocRoom WebInterface.

1.4.4.1   Subscribe to a folder

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Do the next actions to subscribe to a folder:

1. Open the DocRoom WebInterface.
2. Select the folder you want to subscribe in the tree structure.
3. Click on the right mouse button - a menu appears.
4. Select the option Subscribe.
5. A confirmation window appears:
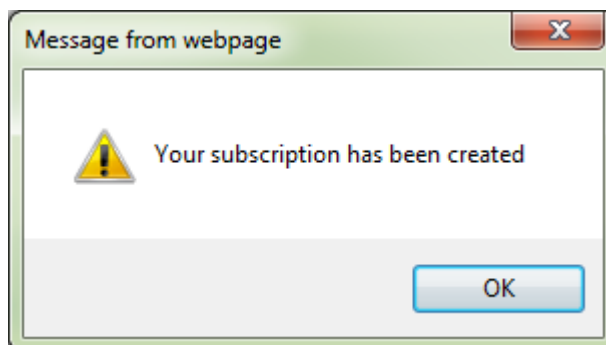
1.4.4.2   Subscribe to a saved query

Do the next actions to subscribe to a saved query:

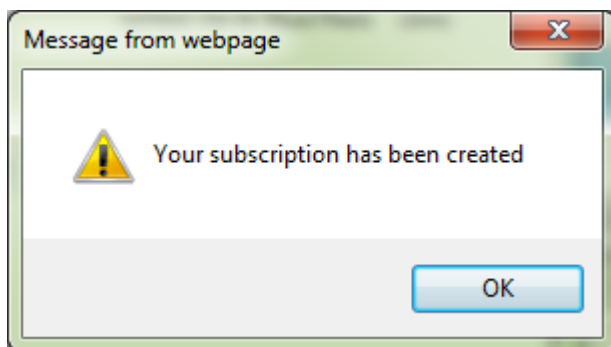1. Open the DocRoom WebInterface.
2. Open the view menu in the toolbar.
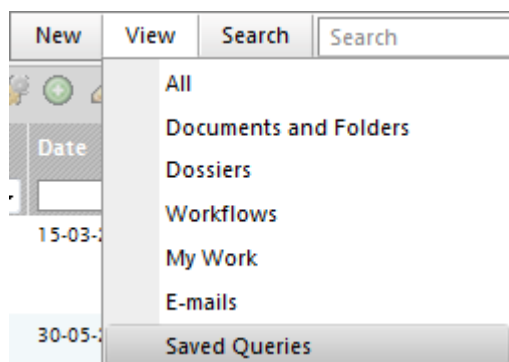
3. Select the option **Saved Queries**. The saved queries overview appears:

4. Click on the subscribe icon in the row of the saved query you want to subscribe to.
5. A confirmation window appears:

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1.4.4.3   See list of subscriptions

Do the next actions to see a list of your current subscriptions:

1. Open the DocRoom WebInterface.

2. Click on the item *My Subscriptions* of the **My DocRoom** part in the tree structure.

3. The list of your current subscriptions appears in the result screen.
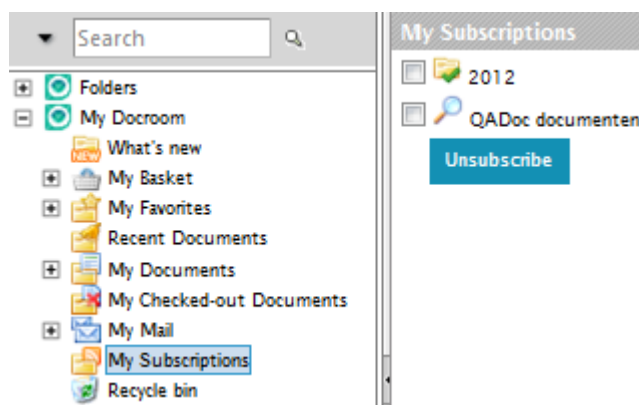
= subscription to a folder

= subscription to a saved query

1.4.4.4   Unsubscribe

Do the next actions to see a list of your current subscriptions:

1. Open the DocRoom WebInterface.

2. Click on the item *My Subscriptions* of the **My DocRoom** part in the tree structure.

3. The list of your current subscriptions appears in the result screen.

4. Select the subscription(s) you want to remove.

5. Click on the button Unsuncribe.

6. The subscription(s) is (are) removed from the list.

1.4.4.5   Push subscriptions to a saved query to certain user(s) (as an administrator)

Application administrators can push subscriptions to a saved query to other users. These users cannot remove the subscription from their list, so they will always receive the information that the application administrator wants them to receive.

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To be able to do this action, the user must have **edit query** rights. These rights can be granted by the creator of the saved query.

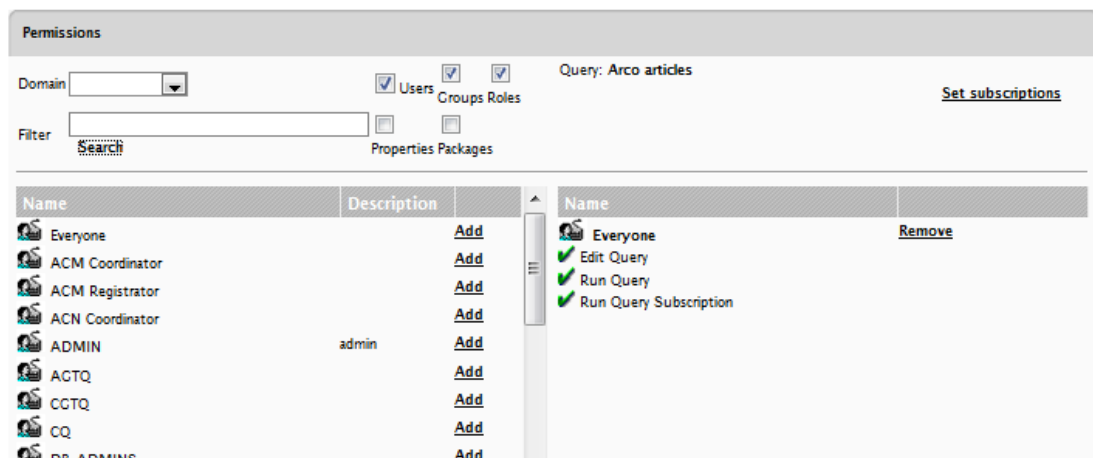*Do the next actions to push subscriptions to a saved query:*

1. First create a saved secured query.

2. Open the detail of the saved query:

   a. Open the view menu in the toolbar.

   b. Select the option *Saved Queries*.

3. The saved queries overview appears.
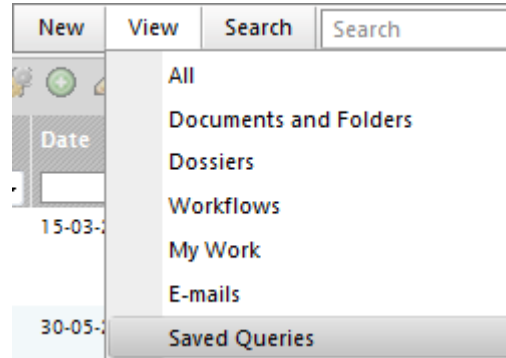
4. Click on the security icon of the subscription that you want to push:
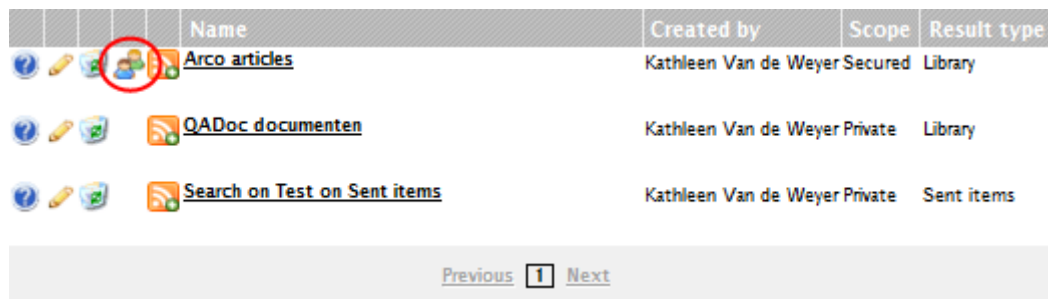
5. The security window appears:

6. Add the user/groups/roles for which you want to set the subscriptions:

   a. Select the user in the left list by clicking on the *Add* option at the right of the user.

   b. The user is then added to the security list of the saved query.

c. Define which actions the user is allowed to do. In this example, we limit this to the option **Run Query Subscription**. (This right is necessary to push the subscription.)

Click on the icon ✔ to disable the option.

Click on the icon ✖ to enable the option.

d. Now click on the option **Set subscriptions** in the upper right corner. The subscriptions are activated with a small message.

1.4.4.6 Subscribe to a worklist

There are 3 types of subscriptions for routing:

1. New work items that have been added since the last mail and that not have been processed yet
2. Work items that are already longer in the work list since the previous mail
3. Work items that are overdue

In DocRoom, a batch job handles the subscriptions. This batch job has to run at least once a day. You have to schedule the task in the evening.

To make the subscriptions being sent, records have to be created in the table DM_SUBSCRIPTION:

with following parameters:

SUBS_NAME: free text
OBJECT_TYPE: 'Routing'
OBJECT_ID: 1, 2 of 3 (depending of the type to be sent)

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SUBJECT_TYPE: User, Role, Group
SUBJECT_ID: name of the user/role/group

If not every user needs to receive emails, you can define Roles.
Define in this Role the users that need to receive an email.

You can define different Roles per Subscription Type.

SUBS_LASTRUN: system field, time of last run

Make sure that this field is filled in, otherwise Subscriptions won't
run.

You can enter an earlier date to do testing, Invoices since Last Run
will be taken in that case.

SUBS_NEXTRUN: system field, time of next run
SUBS_FIXEDINTERVAL: either a number indicating the number of days between subsequent
emails;

either one of the following codes:

WDx: weekly the xth day of the week
MDx: monthly the xth day of the month
x: Nextdate = Now + x days
Empty: Nextdate = Now + 1 day (daily)

Available options:
- Weekly: WD1 ➔ **W**eekly **D**ay **1** (0-6) of the week. The job will run
  every week on the second day of the week. Sunday is the first
  day of the week (=0), Saturday is the last day of the week (6).
- Monthly: MD15 ➔ **M**onthly **D**ay **15** of the month. The job will run
  every month on the 15th.
- 3: Now + 3 days. The job will run every 3 days.
- Empty: Now + 1 day. The job will run daily.
      In this case the job 'SendSubscriptions' has to be scheduled
      in the evening after working hours.

1.4.5   ArcoInfo parameters

You can edit these parameters to customize the layout of the subscription mail.

Parameter	Description
AllFolders	Label Root folder
AllFolders_[langcode]	Translated label Root folder
Dossier	Label Dossier
Dossier_[langcode]	Translated label Dossier
Folder	Label Folder
Folder_[langcode]	Translated label Folder
MailSubject	Subject of the email
MailSubject_[langcode]	Translated Subject of the email
NoParent	Label to shown when object has no parent
NoParent_[langcode]	Translated label to shown when object has no parent
NoTitle	Label to shown when object has no title
NoTitle_[langcode]	Translated label to shown when object has no title

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Query	Label Query
Query_*[langcode]*	Translated label Query
Routing1	Header used by Routing1 (New work items that have been added since the last mail and that not have been processed yet) Layout tag [SUBSCRIPTION]
Routing1_*[langcode]*	Translated header used by Routing1 (New work items that have been added since the last mail and that not have been processed yet) Layout tag [SUBSCRIPTION]
Routing2	Header used by Routing2 (Work items that are already longer in the work list since the previous mail) Layout tag [SUBSCRIPTION]
Routing2_*[langcode]*	Translated header used by Routing2 (Work items that are already longer in the work list since the previous mail) Layout tag [SUBSCRIPTION]
Routing3	Header used by Routing3 (Work items that are overdue) Layout tag [SUBSCRIPTION]
Routing3_*[langcode]*	Translated header used by Routing3 (Work items that are overdue) Layout tag [SUBSCRIPTION]
Routing1_URL	URL used by Routing1 (New work items that have been added since the last mail and that not have been processed yet) Layout tag [ROUTINGURL]
Routing2_URL	URL used by Routing2 (Work items that are already longer in the work list since the previous mail) Layout tag [ROUTINGURL]
Routing3_URL	URL used by Routing3 (Work items that are overdue) Layout tag [ROUTINGURL]
ScreenID	Screen to be used. This screen contains a XML file with the layout of the e-mail.
ScreenID_*[langcode]*	Screen to be used. This screen contains a XML file with the layout of the e-mail.
FilterXml	Refers to the xml file that can be used to filter the results from the subscription.

The parameters with suffix "*_[langcode]*" are optional. Use these parameters if you want to setup multilingual layouts.

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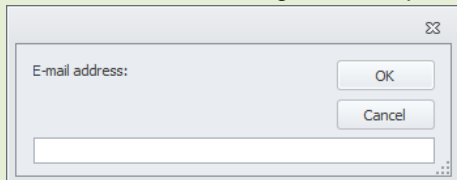
1.5   Mail settings

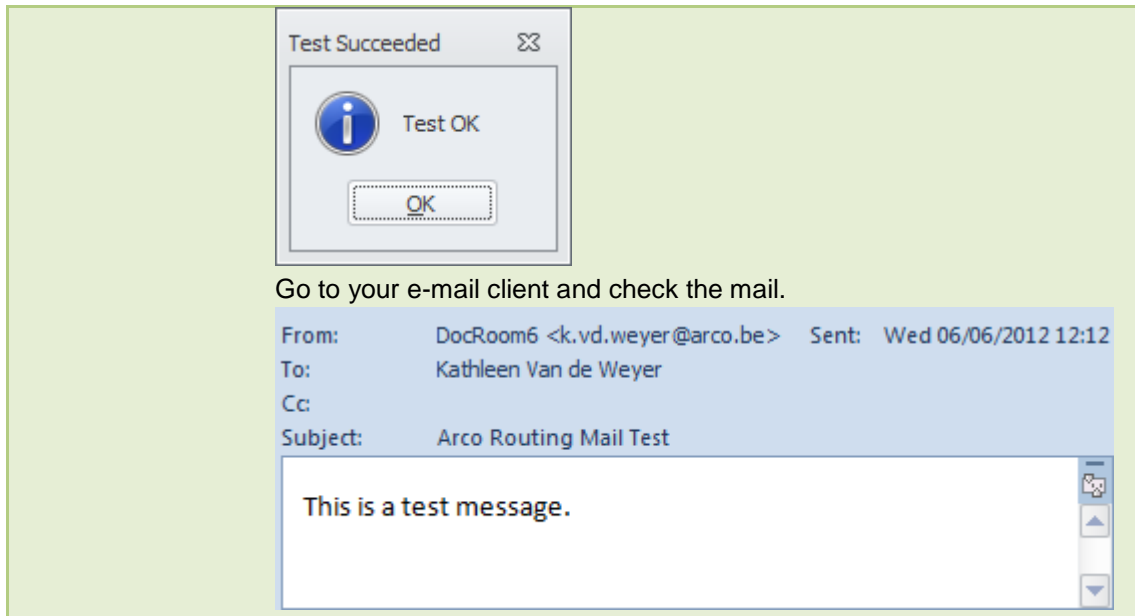The communication between Doma and mail server can be setup in DomaAdmin.

Start the DomaAdmin module and select the item *Mail settings* in the part *Settings* of the navigation tree.
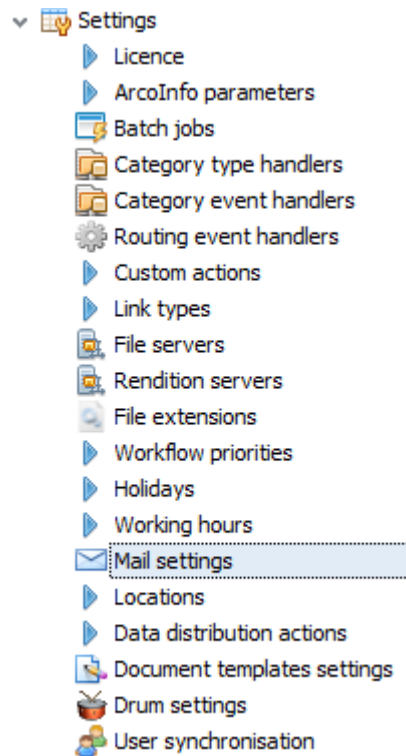
Click on the right mouse button. A menu appears:
- Select the option *Open* to open the screen with the mail settings.

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Field	Description	ArcoInfo parameter (*)
SMTP Server		Server
Port	IP address or name of the SMTP server	Port
Requires Authentication	True: Authenticate using the user name and password. False: Authenticate using the default credentials of the currently logged on user.	Authenticate
User name	Account to use to authenticate against the SMTP server if authenticate is turned on.	AuthenticationAcount
Password	Password to use to authenticate against the SMTP server if authenticate is turned on.	AuthenticationPassword
Default e-mail address	E-mail address to use to send automatic e-mails.	DefaultSender
Default display name	Display name for the default e-mail address	DefaultDisplayFrom
Use SSL	Specify whether the SmtpClient uses Secure Sockets Layer (SSL) to encrypt the connection.	UseSSL
Test button	This will send a message to a recipient. 	

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Test Succeeded

Test OK

OK

Go to your e-mail client and check the mail.

From:	DocRoom6 <k.vd.weyer@arco.be>	Sent:	Wed 06/06/2012 12:12
To:	Kathleen Van de Weyer		
Cc:			
Subject:	Arco Routing Mail Test		

This is a test message.

(*) ArcoInfo parameter with category = Mail.

The description of ArcoInfo parameters is not in the scope of this document. Please refer to document "Doma 6 – Application administrator Manual – 15 – ArcoInfo and Settings" for more information about mail settings in ArcoInfo.

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1.6   Examples

1.6.1   Simple notification

Just notify the user, no action has to be performed by the recipient. Notification is not saved in Doma.

Create event action "Send notification" in one of the categories and let's execute the event. Result: e-mail message with this content:

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Subject: Notification example

Hi, I just want to notify you about this new item:
Interessante cursus created by ARCO\KATHLEEN.

This new item can be found in Doma in this location: **2012\06**.

_____

This is an automated e-mail message, do not reply.

1.6.2   Send notification and save it in Doma

Just notify the user, no action has to be performed by the recipient. Notification is saved in Doma.

Notification template	Name	NotifyUserAndSave	ID	21
Content Default	Description	Notify user and save e-mail notification in Doma.	▼	
Content English	Attachments			

Options

☐ Tracking	☐ Allow reply
☐ Allow external recipients	☐ Allow forward
☐ Allow CC	☐ Send notification
☐ Allow BCC	☑ Archive
☐ Allow attachments	☐ Show full tracking
☐ Response required	☑ Body is HTML

Subject   New: #OBJ_NAME#

Body | Fixed body

Hi,

This is a notification about a new item:
#OBJ_NAME# created by #CREATED_BY#.

This new item can be found in Doma in this location: #FOLDER_PATH#.

<hr />

<small><i>This is an automated e-mail message, do not reply.</i></small>

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Wayenborgstraat 24 – B-2800 Mechelen   info@arco.be   f +32 (0)15 289 031

Create event action "Send notification" in one of the categories and let's execute the event.
Result: e-mail message with this content:

This e-mail is saved in Doma. Go to Inbox of the recipient.

1.6.3   Send notification and track this message in Doma

Send e-mail to an assignee of a DocRoom document, Save this e-mail into Doma because
you want to track this e-mail and a response of the recipient is required.

6/09/2012   Arco Information   42/44
Omega Business Park   www.arco.be   t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen   info@arco.be   f +32 (0)15 289 031

Create user event to trigger the "Send notification" action in one of the categories and let's execute the event.

Result: e-mail message with this content:

Result in Doma Webinterface:

1.6.4   Subscription

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```
<font face=Verdana>

[HEADER_BEGIN]
[USER_DISPLAY_NAME],<br><br>
You receive this e-mail because you are subscribed to one or more subscriptions.<br>
[HEADER_END]

<b>[SUBSCRIPTION]</b>.<br>
Number of documents: [NUMBEROFDOCS].<br><br>
<TABLE border=0>
<TR><TD><b>Document</b></TD><TD><b>Date</b></TD><TD><b>Main File</b></TD></TR>

[DOCUMENTLIST_NEW_BEGIN]
<TR><TD>[TITLE] <small>([FOLDER])</small></TD>
    <TD>[DATE]</TD>
    <TD>[MAINFILE]</TD></TR>
[DOCUMENTLIST_NEW_END]

[DOCUMENTLIST_MODIFIED_BEGIN]
<TR><TD>[TITLE] <small>([FOLDER])</small></TD><TD>[DATE]</TD><TD>[MAINFILE]</TD></TR>
[DOCUMENTLIST_MODIFIED_END]

[WORKLIST_BEGIN]
<TR><TD align=right>[SEQNO].</TD>
    <TD>[CASE_NAME]</small></i></TD>
    <TD>[CASE_DATESTART]</TD>
    <TD>[URL]</TD></TR>
[WORKLIST_END]

</TABLE><br><br>

[FOOTER_BEGIN]
<b>This is an automated e-mail. Please do not reply to this e-mail.</b>
[FOOTER_END]

</font>
```

Result: e-mail message with this content:

6/09/2012
Omega Business Park
Wayenborgstraat 24 – B-2800 Mechelen

Arco Information
www.arco.be
info@arco.be

44/44
t +32 (0)15 289 030
f +32 (0)15 289 031