Doc e Fill
Administrative Manual

Administrator Navigation
Form Management
User Maintenance

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Introduction

Doc e Fill is Web-based document management system designed and created by Softdocs. The system facilitates the review process for forms and other documents, reducing the need for interoffice mail and other methods of paper-based recording. Security is provided through electronic form tracking, administrative controls, and other embedded features, protecting the confidentiality of every document.

Users in the system can be granted access to a unique set of documents, defined by their role in the organization. These are made available in each user’s electronic “library”, allowing for immediate access to the forms they need. After filling out a form in Doc e Fill, the document can be quickly sent to other people in the organization, who will review the information or request. Tracking allows users to see when documents have been approved, denied, or had changes made, along with who performed the action.

This administrative manual will walk you through the administrative functions in Doc e Fill, giving step-by-step instruction on the background settings and maintenance which will manage your organization’s workflow procedure. If this is your first time working with Doc e Fill, Softdocs would like to encourage you to follow along in your own system.

Keep in mind that each installation of Doc e Fill is different depending on the forms required and how the system is set up. Screenshots within this document are provided to give visual reference points and may be slightly different than your own screen. Where applicable, alternate screenshots have been provided. The outlines and reference numbers on some screens reference more detailed images or descriptions found in this document. These references are not actually found on the screen itself.

Minimum System Recommendations

Server Software Recommendations
- Windows Server 2003 or 2008
- MS SQL Server 2005 or 2008
- SQL Server Management Studio
- IIS
- .NET Framework 3.5 SP 1
- RDP for support

SMTP Mail Server
- IP Address of the SMTP mail server is required.
- The mail server should have the ability to send e-mails outside the internal network.
- The Doc e Fill server should be able to communicate directly with the mail server.

Hardware Recommendations
- Minimum of 1.0 GHz Processor (2.0 GHz or higher recommended)
- 1 GB RAM (2 GB recommended)

User Software Recommendations
- Microsoft Internet Explorer 7.0+, Firefox 3.0+, or Safari 4.0 Browser
- Windows XP or higher

Softdocs recommends Internet Explorer 7 or higher for optimal performance.

Adobe Reader 6.0 or higher is required to view the administrative manual and user manual within Doc e Fill’s administrative interface and to view the user manual in the user interface. If you also have the My Archived Images module, you must have Adobe Reader 6.0 or higher in order to see the images in the user interface.

- **NOTE:** In order for Doc e Fill to run properly, you must either add Doc e Fill to the list of Allowed Popup Sites or turn off all pop-up blockers.
- 2 -

Logging in to Doc e Fill

The log in screen (Fig. 2.1) is the first page for the Doc e Fill application. This screen is customizable; some elements can be removed or edited to fit the organization. Changes can be made after logging in to the administrative interface.

- **NOTE:** The user interface times out after a default time of 30 minutes and will log off the current user. Doc e Fill will save changes to any open forms to the user’s Saved Drafts. Please contact Softdocs to customize timeout settings.

Standard Login Screen

Ref. 2.1.1: **Login Fields.** Type in the username, password, and last four digits of the Social Security Number (SSN) or ID number. Press the “Enter” key or click on the “Submit” button to log in. The SSN field title can be customized (page 14).

Ref. 2.1.2: **Register New User Link.** Users without access to Doc e Fill can enter their information to be saved for administrative approval. This begins the process of User Self Setup (page 21).

Ref. 2.1.3: **Forgotten Your Username/Password Link.** If users forget the username or password for their account, they can click on the link to retrieve the username or reset the password.

Ref. 2.1.4: **Administrative Message Box.** The Doc e Fill administrator can add messages and upload pages by using the Messaging module (page 23).

Ref. 2.1.5: **Doc e Fill Version Number.** This is the version of Doc e Fill on the server. Click on the text to open Softdocs’ website (http://www.softdocs.com) in a new window.
LDAP or Custom Authentication

LDAP/Custom Authentication uses Active Directory (or another custom authentication system) to allow Doc e Fill users into the system with their Windows username and password, eliminating the need to remember multiple IDs or passwords for their programs. If this login is used, the change password and password recovery options will be hidden from the login screen and user interface. There is also no need for the third identifier (SSN or other ID number) so that field will be unavailable. To set up an LDAP or custom authentication user, select it from the “User Authentication” type from the drop-down on the user’s information (see page 50, “User Administration”).

- **NOTE:** If the administrator account has missing login information and it cannot be retrieved via the “Forgotten your username/password” option, please contact Softdocs in this regard.

Public Portal

An additional module can be activated to use Doc e Fill as a public interface for forms and information. In these cases, a public portal “site” is set up to be accessed by many people through a single user account and a shortcut on the computer(s). A public portal user can never see archived documents and cannot save drafts. Public portal access is limited to a specified timeframe (the same as a standard user, see note on page 7) and will auto-timeout the user, but unlike a standard user account, the work is not automatically saved. Forms must be completed and sent prior to the timeout’s occurrence.

- **NOTE:** Secure forms and documents should not be given access permission in a Public Portal environment.
- **NOTE:** As an anti-spam measure, CAPTCHA can be implemented on the Public Portal site prior to a user’s access. Users would be required to correctly enter two security words prior to accessing the site.
Public Portal Access

The public portal configuration does not require its users to remember login information because the login screen is bypassed by the shortcut (see note below). Users will instead be directed to a public interface for Doc e Fill with only the Document Library. All buttons on the Navigation Panel are hidden; permissions such as changing of passwords are disabled.

- **NOTE:** The login screen does not grant access to public portal user accounts. An alert will appear above the login fields if the public portal user attempts to enter the username and password at the login screen; these users must use the shortcut or address provided to them for login.

![Public Portal Access Diagram](image)

Sending Forms in Public Portal

The Destination drop-down is hidden. Users have a single destination to forward their forms to using the “Send” button on the limited Document Control panel (Fig. 2.4).

Public Portal User and Form Routing Setup

To set up a public portal for public documents, the only setup required is that of a public portal user account. If forms will be available to be sent, a single destination for routing must be set up for the user’s forms. Set up the user (see page 51, “New User”) and select “Public Portal” from the “User Authentication” drop-down menu at the bottom of the form.

For any forms and form groups set up for the user, designate recipients in the Form Group Routing module (see page 55, “Form Group Routing”). The public portal user is the originator and must be granted only ONE recipient. Other levels of routing can be added beyond the initial two steps. Public Portal user accounts cannot receive documents or be added at any other step of the routing.
Administrative Interface

The Administrative Interface for Doc e Fill contains all of the controls for the system. Manage users, forms, and routing from here.

The Admin Navigation Panel is located on the left. It is comprised of different modules which contain the Doc e Fill settings. Each heading can be expanded by left-clicking on the text. By selecting an option underneath a heading, the configuration settings will appear in the Admin Control Panel to the right of the screen (Fig. 2.6). These will be briefly discussed on the following pages and outlined in detail in individual chapters in this manual.
## Admin Navigation Panel Overview

### Change Logon Info
- **Change Logon Info:** Modify an existing user’s username and password.

### Doc e Fill Configuration
- **Doc e Fill Configuration:** Change the values of the Location, Department, and SSN fields; set default library expand/collapse settings; change e-mail requirements; alter LDAP/Custom Authentication setup; and identify modules for user access configurations.

### Self Setup Configuration
- **Self Setup Configuration:** Turn on/off User Self Setup and modify how the username will be formatted.

### Messaging
- **Messaging:** Send administrative e-mails, send forms to user’s received documents, change the administrative message box on the login screen, change the site images, and customize the system emails sent from Doc e Fill.

### Location Administration
- **Location Administration:** Add/Edit/Delete locations and add/modify document managers.

### Department Administration
- **Department Administration:** Add/Edit/Delete departments and add/modify document managers.

### Form Group Administration
- **Form Group Administration:** Add/Edit/Delete form groups and add/edit form group to department relationships.

### Form Administration
- **Form Administration:** Add/Edit/Delete forms and manually select forms/users to archive documents.
- **User Administration**
  - Search
  - Approve
  - New
  - Modify
  - Delete

**User Administration**: Add/Edit/Delete users and approve users listed in the User Self Service.

- **NOTE:** The “Approve” option is only visible when the User Self Setup feature is turned on (page 20).

- **Form Group Routing**
  - Add/Modify Form Group Routing
  - Delete Form Group Routing

**Form Group Routing**: Add/Edit/Delete form group routing configurations.

- **Doc e Scan Configuration**
  - Export Settings
  - New Export Path
  - Modify Export Path
  - Assign Export Path
  - Workflow Attachment Settings

**Doc e Scan Configuration**: Manage Doc e Scan archiving and Workflow options in the system.

- **NOTE:** To use these features, Doc e Scan must be installed and configured for use with Doc e Fill.

- **Reporting Configuration**
  - New
  - Modify
  - Delete
  - Assign Report
  - Report Settings

**Reporting Configuration**: Add/Edit/Delete report templates or configure default report settings for users.

- **NOTE:** To access these features and activate any other reporting additions to the system, the organization must first purchase the reporting module for Doc e Fill.
Change Logon Information

The first module in the admin navigation panel is the “Change Logon Info” module. The purpose of this module is to change an existing user’s username and/or password.

Change Username

This administrative section can only modify usernames already existing in Doc e Fill. This can also be achieved by loading the Modify User utility (see page 52).

![Fig. 3.1](image)

- Change Logon Info
  - Change Username
  - Change Password

Click on the “Select User” drop-down box and select a user from the list. Input the selected user’s new username in the “New Username” textbox. Click on the “Update” button to change and save the user’s username. Click on the “Cancel” button to clear the active menu selection.

Change User Password

Administrators can only change passwords for users who already exist in Doc e Fill. Passwords can also be changed manually by a logged-in user on the user interface.

![Fig. 3.2](image)

To set a user’s password manually: Select the user from the “Select User” drop-down box, input the user’s new password in the “Password” textbox, and repeat the password in the “Repeat Password” textbox. Click the “Update” button to set the password to that user.

To reset a user’s password: Click on the “Reset” button at the bottom. The password will change to the selected user’s username plus the last four digits of their social security number (SSN) or ID number. For example, a reset password with a username of “myusername” and SSN of “123123123” would be “myusername3123”. Click on the “Cancel” button to clear the active menu selection.

- NOTE: The Change User Password option is not available for organizations using LDAP/Custom Authentication to log in to Doc e Fill. Passwords in these cases must be reset in Active Directory (or other custom authentication system).
Doc e Fill Configuration

The second module in the admin navigation panel is the “Doc e Fill Configuration” module. Default settings for the user library, access types, and field names can be made here as well as the LDAP/Custom Authentication parameters.

Modify Variable Names

This administrative section is where the variable names of Location, Department, and SSN can be changed to suit the organization.

The “Location Variable” is a description that divides users into proper workflow. The default value for “Location Variable” is Location. Changing the text in the “Location Variable” textbox will change all occurrences of this variable in the Doc e Fill administrative and user interfaces (i.e.: The “Change Location” screen under the settings icon on the user Navigation Panel). For example, changing “Location Variable” to “Division” will change the name of the “Location Administration” module to “Division Administration” (Fig. 4.3). “Location Variable” cannot have any of the invalid characters listed in Appendix B, page 75.
The “Department Variable” is a description that divides up users within the “Location Variable”. The default value for “Department Variable” is Department. Changing the text in the “Department Variable” textbox will change all occurrences of this variable in the Doc e Fill administrative interface. “Department Variable” cannot have any of the invalid characters listed in Appendix B, page 75.

The “SSN Variable” represents the identification number for users. The default value for “SSN Variable” is SSN. If users in Doc e Fill use a different tag for their unique key (ID Number or Employee ID, for example), then the field should be changed accordingly. “SSN Variable” cannot have any of the invalid characters listed in Appendix B, page 75. The SSN setting is affected in the following areas: Login screen, Forget Username/Password screen, User Administration screens (Search, Approve, New, Modify).

Modify Library Settings
This section gives the administrator the ability to set the user’s default Doc e Fill library state to “collapse” or “expand”.

To set the library to expand on default (Fig. 4.5), select the “All Nodes Expanded” radio button. To set the library to collapse on default (Fig. 4.6), select the “All Nodes Collapsed” radio button. Click on the “Update” button to save the settings.

The state of the library will always revert back to the set default after the user clicks on a document to be opened.
Email Settings

The administrator can require an e-mail address for form alerts or allow users to use the system without providing an e-mail address. By default, the system requires the address to allow Doc e Fill messages to be sent (see Appendix B in the User Manual).

Select “Yes” and press “Update” to require the e-mail address. Select “No” and click “Update” to turn the requirement off. Users without an e-mail address will not receive the Doc e Fill system e-mails (i.e. new form alerts, routing update messages, and e-mails generated by the administrator from the Messaging module would not be sent). “No” cannot be selected if the “Email Format” selection is chosen for generating usernames for self-setup users (see page 21).

![Email Address Required](image)

If the e-mail address selection is set to “Yes”, when the user logs in for the first time, he or she must enter both a custom password and a valid e-mail address to access Doc e Fill (Fig. 4.8). If the e-mail address selection is set to “No”, only the custom password will be requested by the system. The e-mail address can be changed from the “Change Settings” area of the user interface. For more information and screen capture examples for Doc e Fill system e-mails, please review the Doc e Fill User Manual.

![Update Required](image)

Regardless of which selection is used, when the administrator adds a new user to the system manually, an e-mail address must be entered. The “Use Default” checkbox can be clicked on to set a default address of “noemail@aigtechnology.com” in the Email field. This address is only a placeholder; no actual mail will attempt to deliver.
NOTE: Users who have permissions to request passwords and usernames cannot receive the generated information from Doc e Fill unless a valid e-mail address is provided.

NOTE: For more information about adding users, see page 51.

**LDAP Settings**

The LDAP parameters can be set in this section of the administrative area of the program. In the available field (Fig. 4.10), the ADS Path, username and password can be typed in order to set the Active Directory information. If LDAP will not be used, these fields can be left blank.

**User Access Configuration**

This area allows the administrator to create new default configurations for users upon login to Doc e Fill. This determines which icons are displayed in the navigation panel in the top left corner of the screen and which area is displayed upon login. There are three options available in this module: Add New, Modify, and Delete. Clicking on one of the radio buttons will load appropriate option.
Add New User Access Type

Two user access types are preconfigured for Doc e Fill: Default and Public Portal Access.
- **Default:** All modules are displayed. The Document Library is displayed on login.
- **Public Portal Access:** Only the Document Library and Print icons are displayed in the navigation panel. The Document Library is displayed on login.

To add a new type, enter a name (i.e. ESS Users) into the first available field. Select the icons to display in the navigation panel by using the arrows under the list. The box on the left contains items which will not be included and the items on the right will be displayed. “<<” moves all items from the right box to the left box, “<” moves a single, selected item from the right box to the left box. “>>” moves all items from the left box to the right box, “>” moves a single, selected item from the left box to the right box. Items in the right box affect the drop-down list available for the Default Document Tree. The module selected from the drop-down will be the first module loaded when a user with the assigned User Access Type logs in to the Doc e Fill user interface.

```
Add New User Access Type

User Access Type Name*: 

<table>
<thead>
<tr>
<th>Change User Settings</th>
<th>Completed Archive</th>
<th>Document Library</th>
<th>ESS Documents</th>
<th>Help Icon</th>
<th>Print Icon</th>
<th>Received Documents</th>
<th>Saved Documents</th>
<th>Submitted Documents</th>
<th>User Reports</th>
</tr>
</thead>
</table>

<<  <  >  >>

Select Default Document Tree*: 

* required

Update  Cancel
```

The following modules are available for selection: Change User Settings, Completed Archive, Document Library, ESS Documents*, Help Icon, Print Icon, Received Documents, Saved Documents, Submitted Documents, and User Reports*. Items not selected for display cannot be accessed by the user at all.

- **NOTE:** Some icons and modules in the Doc e Fill user interface require extra licensing or they will not able to be accessed (even if selected in the configuration). Please contact Softdocs for more information.
Modify User Access Type
The name, available modules, and default display on login can be changed for any access type. To change settings for the access type, select the type from the drop-down, modify the fields, and click on the “Update” button at the bottom of the module.

![Modify User Access Type](image1)

Delete User Access Type
Access types can be deleted by selecting the type from the drop-down list and clicking on the “Update” button at the bottom of the module.

![Delete User Access Type](image2)
Self Setup Configuration

The third module in the admin navigation panel is the “Self Setup Configuration” module. Here, configure the User Self Setup for user access to the form from the link on the login page and formatting of generated usernames.

Modify Self Setup Status

When self setup is enabled, users can click on the “Register New User” link on the login page (Fig. 5.3). When self setup is disabled, the link will not show (Fig. 5.4).

To enable self setup for users, select “True” and click the “Update” button to save changes. To disable self setup, select “False” and click the “Update” button to save changes.

Changes are made to the administrative navigation panel as well. When self setup is enabled, the administrator can click on the “Modify Username Format” link under the “Self Setup Configuration” module (Fig. 5.5) and the “Approve” link in the “User Administration” module (Fig. 5.6). When self setup is disabled, neither link appears (Figs. 5.7 and 5.8).
Modify Username Format

Modify Username Format
- FirstInitial + LastName
- FirstName + LastInitial
- LastName + FirstInitial
- LastInitial + FirstName
- Email Format

Fig. 5.9

After the user enters the information through User Self Setup and clicks the “Submit” button, the username is generated. There are a number of ways Doc e Fill can generate the username. A user with the name John Doe and an e-mail address of john.doe@domain.com, for example, could have these results:

- FirstInitial + LastName = jdoe
- FirstName + LastInitial = johnd
- LastName + FirstInitial = doej
- LastInitial + FirstName = djohn
- Email Format = john.doe

Fig. 5.9

After the username format is selected, click on the “Update” button to save. Click on the “Cancel” button to clear the active menu selection.

User Self Setup

The purpose of User Self Setup is to allow a user to input his or her own information into Doc e Fill. This information is used to give the user a username, password, and access to forms. There are two ways to add users into Doc e Fill:

- User Self Setup: A user enters and submits their information which is then reviewed by the administrator. Once the administrator has approved the information, a username and password will be sent via e-mail to the user for access to Doc e Fill.

- User Administration: The administrator of Doc e Fill enters all user information into Doc e Fill. Once submitted, the username and password will be sent via e-mail to the user for access to Doc e Fill. The Add New User function is under the User Administration module, page 51.

Fig. 5.10
User Self Setup Overview

1. The **Self Setup Status** must be set to **true**. Refer to Modify Self Setup Status on page 20.
2. Users will click on the link “Register New User” found on the login page.
3. The following information will be entered:
   - First Name (required)
   - Last Name (required)
   - ID Number/SSN (required)
   - Phone
   - Email (required)
   - Departments
   - Locations
   - Form Groups will be automatically assigned depending on the selected department(s). Refer to page 37 for more information on these defaults.
4. Users will click on the “Submit” button.
5. The information is saved until the Doc e Fill Administrator approves or deletes the submitted user data. The administrator also receives a notification email after a user has registered for the site.

   ➢ **NOTE:** Fields on the Self Setup form cannot have any of the invalid characters listed in Appendix B, page 75. Username and SSN fields cannot contain spaces.
   ➢ **NOTE:** As an anti-spam measure, CAPTCHA can be implemented on the user registration form. Users would be required to correctly enter two security words prior to submitting the form.

Approving Self Setup Users

View users by clicking on the “Approve” link under the User Administration module.

1. Click on the “Select User” drop-down list. All pending users will populate the drop-down box. Select a user to review.
2. The data entered by the selected user will populate the fields, including a username generated from the user's information. If this needs to be changed, click in the field and type a new username.
3. Make any changes to Departments, Locations, and Form Groups.
4. Insert an Authentication method.
5. Enable or disable User Reporting (page 69).
6. Approve or delete the selected user.
7. Click on the “Approve” button to save the user information. The account is now active. The user will receive an e-mail with his or her username and password.

   **OR**
   
   Click on the “Delete” button to remove the user and all saved data from that user. An alert will appear to confirm this decision.
8. Once the user is approved or deleted, the user will be removed from the “Select User” drop-down list.
Messaging

The fourth module in the admin navigation panel is the “Messaging” module. This module is used to send e-mail, set the login message, and send documents to users’ Received Documents. Backgrounds and system messages can also be customized in this module.

Fig. 6.1

Send Form Email

This area gives administrators the ability to send an existing Doc e Fill document to selected users’ Received Documents. This is a way to give users the ability to route a document (such as a contract) that does not normally show up in their Document Library.

Fig. 6.2

Send a document to a user’s Received Documents list:

1. Enter a username that exists inside Doc e Fill in the field labeled “From”. This username will show up as the user sending the form.
2. Select the document to be sent from the “Select Form” drop-down box.
3. Select the location of the users by selecting a location in the drop-down labeled “Select Location”. A list of users will populate the list-box labeled “Select Employees”. The users that populate the “Select Employees” list-box are users who are all selected in the origin of the route configuration for the selected Location and the selected form’s Form Group.
4. The selected users in the “Selected Employees” list-box are the employees that will receive the document. By default, all names are checked for the specified location. To deselect users, hold the “Ctrl” key and click on a selected user.
5. Click on the “Send E-mail” button to send the document or click on the “Cancel” button to clear the active menu selection.
Send Email

The “Send Email Utility” section allows administrators to send an e-mail to selected users. The e-mail will be sent to the selected user’s e-mail address applied in the User Administration section, page 50. If no e-mail address is provided, the e-mail will not be delivered to the user.

![Send Email Utility](image)

**Fig. 6.3**

**To send an e-mail:**

1. Type in an e-mail address to send from in the “From” field.
2. Select the Location and Department of the user(s) who will be receiving the e-mail by clicking on the drop-down labeled “Select Location” and “Select Department”.
3. The users existing in the selected Location and Department will populate in the list-box labeled “To”. The selected users in the “To” list-box will receive the e-mail. To select or deselect users, hold the “Ctrl” key and click on a user in the “To:” box.
4. Enter text for the e-mail’s subject in the “Subject” textbox.
5. Add an attachment, if needed, by clicking on the “Browse” button and finding the attachment on the local machine.
6. Type in the e-mail message in the text-area labeled “Message”.
7. Click on the “Send E-mail” button to send the e-mail or click on the “Cancel” button to clear the active menu selection.
Admin Message
The Admin Message Utility section is where the administrator can change or add a message located just below the login information on the login screen. There are three ways to modify the login screen message (Fig. 6.4). These are accessible through the radio buttons to the left of the option text:

- Set Admin Message: Add a generic text-only message with no images/scripts.
- Upload Admin Message Page: Upload an existing HTML page with images/scripts.
- Reset Admin Message: Replace any message with the company logo.

Set Admin Message
The first option is the “Set Admin Message” utility. Click on the radio button next to the text to open the module. Set a generic text-only message by adding a Page Heading, Referred To text, Body, closing Remarks, and Sender. Click on the “Set Admin Message” button to save the text and upload it to the login screen. Click on the “Cancel” button to clear the active menu selection.

All users who load the Login screen will see the customized message (Fig. 6.7).
Upload Admin Message Page

The second option is the “Upload Admin Message Page” utility. Click on the radio button next to the text to open the module. This utility will only work if an HTM or HTML file is available for uploading. Browse for the HTML file and click on the “Add” button to upload the file. Browse for any Images or Scripts and click on the “Add” button to upload those files. All files will show up in the list-box labeled “Html/Script Files/Images Uploaded”. Remove files by selecting the file in the list-box and clicking on the button named “Remove”, or click on the “Remove All” button to remove all files in the list-box. Click on the “Upload Admin Message Page” to save the page and upload it to the login screen. Click on the Cancel button to clear the active menu selection.

NOTE: In order for images and scripts to work properly on imported HTM or HTML admin messages, set the path to “AdminMessage/images/(imagename)” and “AdminMessage/scripts/(scriptname)” wherever they are placed in the HTM or HTML file. Replace (imagename) and (scriptname) with the correct file names of the items uploaded.
Reset Admin Message
The third option is the “Reset Admin Message” utility. Click on the circle next to the text to reset the admin message section on the login screen to the company logo. This will clear out any text- or HTML-based messages in the Admin Message Box. A confirmation message will appear to verify the reset.

Backgrounds/Splash Screens
The page that appears in the Document Panel when a user first logs in to Doc e Fill can be customized for the organization in the Backgrounds/Splash Screens area. The administrator can now upload a replacement page to display instead of the default site instructions and graphics. To modify a background, first select it from the drop-down list.

After selecting a background, the "Select Action" drop-down appears. There are two options available: Upload/Replace (Fig. 6.10), or Reset to Default.

Upload/Replace
Choosing this option from the action drop-down list reloads the area with additional controls. The administrator can click "Browse" to locate an HTML file to use as the new background. The "Add" button opens the "Add Images and Scripts" window where individual images, scripts, and styles required by the HTML can be selected and uploaded. Click on "Apply" to replace the current background with the new HTML page, or "Cancel" to close the module.

Reset to Default
Choosing this option from the action drop-down list will remove the custom page from the document panel and restore the original instructions and graphics. Two buttons appear underneath the drop-down after the selection is made. Click on "Reset to Default" to confirm the action, or "Cancel" to close the module.
Notification Content

Automated email notifications are sent from Doc e Fill for various actions in the system (archival and routing of forms, password changes, etc.). The subject and body of these emails can be customized by an administrator. To select a default to edit, choose an Email Type from the drop-down list at the top of the module. Edit the existing subject and body of the email as needed. Click “Update” to save or “Cancel” to close the module.

Variables

Placing the following terms inside a set of brackets in the subject or body of the email to indicate a placeholder for Doc e Fill to automatically populate the correct information when the notification is sent.

- **Actor**: Name of the person who acted on the form.
- **Display Field**: Value of the Display Field on the form.
- **Form**: Name of the form which was acted on.
- **Originator**: Name of the person who originated the form.
- **Recipient**: Name of the recipient of the notification.

![Modify Notification Content](image)
**Email Types**

Review the table below for a list of the default subject and body for each type of email available for customization.

<table>
<thead>
<tr>
<th>Email Type</th>
<th>Default Subject</th>
<th>Default Body</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Recipient - Active User</td>
<td>New [Form]</td>
<td>(Recipient), a new [Form] from [Actor] is awaiting your action.</td>
</tr>
<tr>
<td>Send Recipient - Forwarding User</td>
<td>New [Form] for [Recipient]</td>
<td>New [Form] from [Actor] is awaiting [Recipient]'s approval and has been forwarded to you.</td>
</tr>
<tr>
<td>Authorize Originator - Active User</td>
<td>Your [Form] has been approved</td>
<td>[Originator], your [Form] has been approved by [Actor] and is awaiting [Recipient]'s approval.</td>
</tr>
<tr>
<td>Authorize Originator - Forwarding User</td>
<td>[Originator]'s [Form] has been approved</td>
<td>[Originator]'s [Form] has been approved by [Actor] and is awaiting [Recipient]'s approval.</td>
</tr>
<tr>
<td>Authorize Recipient - Active User</td>
<td>New [Form]</td>
<td>[Recipient], New [Form] from [Actor] is awaiting your action.</td>
</tr>
<tr>
<td>Authorize Recipient - Forwarding User</td>
<td>New Form for [Recipient]</td>
<td>[Recipient]'s [Form] has been forwarded to you from [Actor] and is awaiting your action.</td>
</tr>
<tr>
<td>Deny Originator - Active User</td>
<td>Your [Form] has been denied</td>
<td>[Originator], your [Form] has been denied by [Actor] and is awaiting [Recipient]'s action.</td>
</tr>
<tr>
<td>Deny Originator - Forwarding User</td>
<td>[Originator]'s [Form] has been denied</td>
<td>[Originator]'s [Form] has been denied by [Actor] and is awaiting [Recipient]'s action.</td>
</tr>
<tr>
<td>Deny Recipient - Active User</td>
<td>New [Form]</td>
<td>[Recipient], New [Form] from [Actor] is awaiting your action.</td>
</tr>
<tr>
<td>Deny Recipient - Forwarding User</td>
<td>New Form for [Recipient]</td>
<td>[Recipient]'s [Form] has been forwarded to you from [Actor] and is awaiting your action.</td>
</tr>
<tr>
<td>Archive Approve Originator - Active User</td>
<td>Your [Form] has been archived</td>
<td>[Originator], your [Form] has been approved and archived by [Actor].</td>
</tr>
<tr>
<td>Archive Approve Originator - Forwarding User</td>
<td>[Originator]'s [Form] has been archived</td>
<td>[Originator]'s [Form] has been approved and archived by [Actor].</td>
</tr>
<tr>
<td>Archive Approve Notification Group User</td>
<td>[Originator]'s [Form] has been archived</td>
<td>[Originator]'s [Form] has been approved and archived by [Actor].</td>
</tr>
<tr>
<td>Archive Deny Originator - Active User</td>
<td>Your [Form] has been archived</td>
<td>[Originator], your [Form] has been denied and archived by [Actor].</td>
</tr>
<tr>
<td>Archive Deny Originator - Forwarding User</td>
<td>[Originator]'s [Form] has been archived</td>
<td>[Originator]'s [Form] has been denied and archived by [Actor].</td>
</tr>
<tr>
<td>Archive Deny Notification Group User</td>
<td>[Originator]'s [Form] has been archived</td>
<td>[Originator]'s [Form] has been denied and archived by [Actor].</td>
</tr>
</tbody>
</table>
The fifth module in the admin navigation panel is the “Location Administration” module. The purpose of this module is to add, edit, and delete locations. This module also gives administrators the ability to add and modify location document managers. Locations are very important to Routing (page 55) and adding locations should be dependent on the intended workflow for users.

- **NOTE:** If the variable has been changed for “Location” (page 14), the screens in this section will appear differently. Each reference to “Location” will be replaced with the updated variable.

### New Location

To add a new location, type the name of the location in the “Location Name” textbox. The location name cannot have any of the invalid characters listed in Appendix B, page 75. Click on the “Update” button to add the location. Click the “Cancel” button to clear the active menu selection.

![Add New Location](image)

### Modify Location

To modify the name of a location, first select the location to be modified in the “Select Location” drop-down box. The name of the location selected in the “Select Location” drop-down will populate in the “Location Name” textbox. Next, make any modifications to the name populated in the “Location Name” textbox. The location name cannot have any of the invalid characters listed in Appendix B, page 75. Click on the “Update” button to save the modifications. Click the “Cancel” button to clear the active menu selection.

![Modify Location](image)
Delete Location

To delete a location, first select the location to delete in the “Select Location” drop-down box and click the “Update” button.

- **NOTE:** Use caution when deleting locations. Any route configuration associated with this location will be lost. Be prepared to adjust routing and location managers when deleting locations.

An alert box will open stating “Doing this may adversely affect Users. Do you wish to continue?” Click on the “OK” button to continue the update. Click on the “Cancel” button to close the alert box without deleting the location.

Add/Modify Location Manager

Managers in Doc e Fill may not work the same as managers in the workplace. Doc e Fill users who are managers do not get more privileges than non-manager users. A Doc e Fill manager user is only used in the Form Group Routing (page 55) as a way to filter users.

To assign managers to a specific location, first click on the “Select Location” drop-down box and select a location. All non-location-manager users will populate the left list-box. All location-manager users will be listed in the right box. Select the user(s) by clicking them in the left box or hold down the “Ctrl” key to select multiple users. Click on the “>” button to move them over to the right box. Click on the “>>” button to move all users from the left box to the right box. Click on the “<” button to remove users from the right box. Click the “<<” button to move all users from the right box to the left box.

Click on the “Update” button to save. An alert box will open stating “Doing this may result in some blank steps in your routing. Do you really want to continue?” Click on the “OK” button to continue the update. Click on the “Cancel” button to close the alert box without saving.
The sixth module in the admin navigation panel is the “Department Administration” module. The purpose of this module is to add, edit, and delete departments. This module also gives administrators the ability to add and modify department document managers. Open the module by clicking on the “Department Administration” text.

- **NOTE:** If the variable for “Department” has been altered (page 14), the screens in this section will appear differently. Each reference to “Department” is replaced by the updated variable.

### New Department

![Add New Department](image)

To add a new department, type the name of the department in the “Department Name” textbox. Department names cannot have any of the invalid characters listed in Appendix B, page 75. Click on the “Update” button to add the department. Click the “Cancel” button to clear the active menu selection.

### Modify Department

![Modify Department](image)

To modify the name of a department, first select the department to be modified in the “Select Department” drop-down box. The name of the selected department will populate in the “Department Name” textbox. Next, make any modifications to the name displayed in the “Department Name” textbox. Department names cannot have any of the invalid characters listed in Appendix B, page 75. Click on the “Update” button to save the modifications. Click the “Cancel” button to clear the active menu selection.
Delete Department

To delete a department, first select the department to delete in the “Select Department” drop-down box and click the “Update” button.

An alert box will open stating “Doing this may adversely affect Users. Do you wish to continue?” Click on the “OK” button to continue the update. Click on the “Cancel” button to close the alert box without deleting the department.

- **NOTE:** Use caution when deleting departments. Any route that is configured with the department will be altered. Department managers will also be removed upon deletion of their department. These users will have to be reassigned to allow them to appear in the Form Group Routing options.

Add/Modify Department Manager

Managers in Doc e Fill may not work the same as managers in the workplace. Doc e Fill users who are managers do not get more privileges than non-manager users. A Doc e Fill manager user is only used in the Form Group Routing (page 55) as a way to filter users.

To assign managers to a specific department, first click on the “Select Department” drop-down box and select a department. All non-department-manager users will populate the left list-box. All department-manager users will display in the right box. Select the users by clicking them in the left box or hold down the “Ctrl” key to select multiple users. Click on the “>” button to move them over to the right box. Click on the “>>” button to move all users from the left box to the right box. Click on the “<” button to remove selected user from the right box. Click the “<<” button to move all users from the right box to the left box.
Click on the “Update” button to save. An alert box will open stating “Doing this may result in some blank steps in your routing. Do you really want to continue?” Click on the “OK” button to continue the update. Click on the “Cancel” button to close the alert box without saving the changes to the manager list.

Fig. 8.7
Form Group Administration

The seventh module in the admin navigation panel is the “Form Group Administration” module. There are two functions to this module. The first function allows adding, editing, and deleting of form groups. The second function in the “Form Group Administration” module is to create a relationship between departments and form groups.

Originating users will see documents under each Form Group heading in the user interface’s Document Library (see Appendix A, page 74). In Fig. 9.2, the form groups in the sample Document Library have been highlighted.

The administrator needs to assign departments to the form groups for routing. The route of a form is based upon the location of the user and the form group the form resides under. This is important on two different occasions:

- The Form Group is automatically added to a user under the User Administration module (page 50) when a department is added that also is selected in the “Default Departments” on the Configure Group Routing screen (page 55).

- When the department checkbox is checked within the Form Group Routing module (page 55) only the list of departments selected in “Default Departments” on the Configure Group Routing screen will be available for that Form Group.
New Form Group
To add a new form group, type the name of the form group in the “Group Name” textbox. Form group names cannot have any of the invalid characters listed in Appendix B, page 75. Click on the “Update” button to add the form group. Click the “Cancel” button to clear the active menu selection.

Modify Form Group
Two actions can be done within the “Modify Form Group” selection: modify the name of the form group or assign departments to a form group. Both can be done at the same time or the administrator can change only one.

Select a form group from the “Select Group” drop-down. The selected form group’s name will populate the “Group Name” textbox. A list of non-default departments will appear in the left “Default Departments” list-box and all default departments will appear in the right list-box.

Modify Form Group Name
Make any modifications to the name displayed in the “Group Name” textbox. Form group names cannot have any of the invalid characters listed in Appendix B, page 75. Click on the “Update” button to save. Click the “Cancel” button to clear the active menu selection.
**Assign Departments to a Form Group**

Default Departments are used to automatically assign form groups to users. When a department is selected on a user form (User Self Setup, New/Modify User), the associated form groups are added to the user’s profile. Default Departments can also be used to designate user placement when setting up routing for forms based on department.

Select departments by clicking them in the left box or hold down the “Ctrl” key to select multiple departments. Deselect a department by holding down the “Ctrl” key and clicking on a selected department.

Click on the “>” button to move the departments over to the right box. Click on the “>>” button to move all departments from the left box to the right box. Click on the “<” button to remove selected departments from the right box. Click the “<<” button to move all departments from the right box to the left box.

Click on the “Update” button to save. Click the “Cancel” button to clear the active menu selection. Route configuration must be modified to have changes take place. Auto-update does not automatically add, modify, or delete the default department in the configuration.

**Assign Global Routing Users**

After departments have been assigned to the form group, global routing users can also be selected. Move the user or users to the box on the right in the same way departments were moved. These users can route forms from the group to any user in the specified departments, regardless of location.

**Delete Form Group**

To delete a form group, first select the form group to delete in the “Select Group” drop-down box and click the “Update” button.

![Delete Group](image)

An alert box will open stating “Doing this may adversely affect Users. Do you wish to continue?” (Fig. 9.6). Click on the “OK” button to continue the update. Click on the “Cancel” button to close the alert box without deleting the group.
The administrator cannot delete a form group if there is a form in that form group that is saved, in route, or archived. The form group can only be inactivated. When a form group is inactivated, the form group is not visible in the document library. Users will not be able to originate and send the form.

![Delete Group](image)

The message “Forms added to the group are in use. Cannot Delete Group” and an “Inactive” checkbox will appear on the screen (Fig. 9.7). To inactivate the form group, click on the “Inactive” checkbox and click on the “Update” button.

## Assign Group

![Assign Group](image)

With large numbers of users in the system, newly added form groups can take a long time to add to individual user libraries. The Assign Group feature is a quicker way to add many users at one time. The first field in the Assign Group section is “Select Group”. This must be selected from the drop-down menu to the right in order to designate the form group which will be mass-added to users. The next two fields, “Select Location” and “Select Department”, are used to designate the users the form group will be assigned to. A location, department, or a combination of both can be selected from the drop-down menus. The “Update” button will assign the form group to the users in the location or department.

Along with individual locations or departments receiving the form group in their library, the ability to assign it to all users is also available. When selecting “All” for the location, all users will have the form group added to their libraries, including users who have not been assigned a location. When selecting “All” for the department, all users will have the form group added, including users who have not been assigned to a department.

- **NOTE:** Selecting a location and a department will narrow the user selections to only those users who have permissions in both areas of Doc e Fill. It will not assign to all users in each individual area.

- **NOTE:** When a form group is added to a department it becomes the default group for that department.
Form Administration

The eighth module in the admin navigation panel is the “Form Administration” module. The purpose of this module is to add, edit, and delete forms. Administrators can also change the setting which indicates whether certain forms, certain user's forms, or all Doc e Fill forms will be automatically archived upon delivery.

- New
- Modify
- Delete
- Auto Archive
- Purge

Fig. 10.1

NOTE: This module does not give administrators the ability to make physical changes on the Doc e Fill document, i.e. adding fields, modifying colors, adding images, etc. To make a change to an uploaded Doc e Fill form, delete the existing form, change the HTML document to be uploaded, and then re-upload the form.

New Form

Input the name of the form in the textbox labeled “Form Name“. Enter a description in the textbox labeled “Description“. Select the form group from the drop-down box labeled “Group“. Click on the “Browse” button next to the textbox labeled “Choose a Form” to browse for the HTML document to be uploaded. Use the radio buttons to set the properties for the form. Refer to page 40 for detailed descriptions of each field. The Form Name and Description fields cannot have any of the invalid characters listed in Appendix B, page 75.

Fig. 10.2

NOTE: Only a form that has been created in HTML format can be uploaded.
**Editable**

When the “Editable” setting is set to “Yes”, users routing the form will be able to change information on the form after it has been sent. Select “No” to make it a static form after the originator passes the document to the next user in the routing.

**Attachments Allowed**

When the “Attachments Allowed” setting is set to “Yes”, the Attachment button is enabled in the Document Control Panel below the form in the user interface, Appendix A, page 74.

**Comments Allowed**

The Comments text box in the Document Control Panel will not be available for use on the form if “No” is selected. If “Yes” is selected, users will be able to see the Comments field and send comments into workflow with the form.

**Confirm Send**

The three available checkboxes (Fig. 10.6) allow a confirmation dialog (Fig. 10.7) to appear on the user interface when a user performs the designated action (Send, Approve, and/or Deny). The alert contains the name of the intended recipient of the form and allows the user to confirm or cancel the action. When unchecked, no alert will appear when a user performs a send action.

> **NOTE:** When active, the confirmation dialog (Fig. 10.7) applies to the following user actions: Send, Approve, or Deny. “OK” confirms and continues with the action and “Cancel” returns the user to the form with no routing action.

**Display Field Number**

Fields in the form are counted left to right. By indicating the number of the field in the textbox “Display Field Number”, the contents will display in document references in the user interface of Doc e Fill.

Each link reference to this type of form in a user’s Saved Drafts, Received Documents, and Submitted Documents will display the date, name of the form, and the information inserted into the field. For example, if the “Display Field Number” is set to “4” for the test registration form in Figure 10.9, when the fourth field in the form is filled in and saved the content appears in the user’s Saved Drafts. In the example, the fourth field is the “Institution”, where the user has entered “Softdocs”. After setting the “Display Field Number”, the text appears following the date and form name in the link on the left. Recipients of this document will see the same information in their Received Documents.
Reminders for Outstanding Pending Forms

When a form is submitted to workflow in Doc e Fill, an automated notification email is sent to the recipient. Forms can be configured to send additional notification emails when a routed form has awaited action for a specified number of days in a user's Received Documents inbox. Two fields are available for reminder configuration.

![Fig. 10.10](image)

*Fig. 10.10*

*Reminders for outstanding pending forms*

- **Initial Notification**: Indicates the number of days to wait before Doc e Fill will automatically send the first reminder email for a form of this type.

  ➢ **NOTE**: The "Initial Notification" email is not the same as the automated email sent when the form is first routed. This is a second email sent after the specified number of days to remind the user of the pending form. If no number is entered, only the automated notification email will send, and not this second email.

- **Recurrence**: Indicates the number of days to wait after the first reminder email is sent before Doc e Fill will automatically send subsequent reminder emails. Additional emails will be sent at regular intervals based on the number of days indicated by this field. If this field is blank, no additional reminders will be sent after the Initial Notification email.

  ➢ **NOTE**: If the "Initial Notification" field is blank but there is a number in this field, reminder emails will still be sent out at regular intervals after the automated notification email is sent instead of after the "Initial Notification" email.
Show Display Field in Reports

Enables the "display field" designated for the form (see Display Field Number, page 40) to display on a report. The checkbox must also be checked on the report to enable the additional column of information.

Show Last Tracking Step in Reports

This checkbox is part of the reporting module. For more information on this module, please see page 69. When checked, opening a form from the detailed list displayed on a report opens the archived form. If it is not checked, opening a form from the detailed list displayed on a report opens the form as it appeared in the stage of the routing when the selected user handled the form.

Doc e Scan Export Path

Indicates the export location of the Doc e Fill form to be imported into Doc e Scan. The list is based off of the added export paths assigned on the Add/Modify Export Path screens. Either “Do Not Export” or the name of an Export Path must be selected from the drop-down if the form will be archived to Doc e Scan.

Doc e Scan Cover Page

A document package from Doc e Scan can be attached to a cover page to create a Workflow document. It is then routed through Doc e Fill like a normal document or form.

Checking the box will hide the options for “Doc e Scan Export Path” and “Import Attachments into Doc e Scan”. This is because cover pages utilize Doc e Fill and Doc e Scan Workflow processes. A default Workflow export path is used to import Doc e Fill forms and attachments into Doc e Scan.

- **NOTE:** If Doc e Scan is not in use to archive Doc e Fill documents, the “Doc e Scan Cover Page” checkbox will not be visible. Contact Softdocs for more information on our paperless archival solution.
Figure 10.15 shows an example of a cover page. Please refer to “Scan Admin Configuration” on page 65 for more information on setting up Doc e Scan Workflow routing and archival.

Fig. 10.15

- **NOTE:** Regular attachments will be disabled. Only one attachment of a document package from Doc e Scan is allowed per originating cover page.

**Import Attachments into Doc e Scan**

![Image of Import Attachments into Doc e Scan]

Fig. 10.16

- Allows attachments to a form to be archived with the parent document into Doc e Scan upon completion of the workflow. The “Attachments Allowed” radio button must be marked “Yes” and this checkbox must be marked in order to enable this feature. Attachment file types are restricted to file types readable by Doc e Scan. If the checkbox is unchecked, attachments may be made to the document per the “Attachment Allowed” radio button (when “Yes” is selected) and the default system attachment file types will be accepted without Doc e Scan file type restrictions.

**Doc e Serve Self Service Form**

![Image of Doc e Serve Self Service Form]

Fig. 10.17

- Allows Doc e Serve to display information in the Doc e Fill user interface based on the form’s data request. When checked, non-applicable options on the form are hidden (Fig. 10.18).

- **NOTE:** If Doc e Serve Self Service is not used by your organization, this option will not be available on the “Add New Form” or “Modify Form” screens.
Self Service forms send a request to Doc e Serve for information based on the logged in Doc e Fill user. The result is displayed in the document panel on the user interface. Only “Print” and “Cancel” buttons are available. Self Service forms cannot be routed.

![Add New Form](image)

The data request is specific to a Doc e Fill user and Doc e Serve Job. The Job must be selected from the “Doc e Serve Job” drop-down list. There are two methods for data retrieval using Doc e Serve Self Service documents, depending on the form used:

- **Pre-Processing:** The result is automatically generated based on the user’s information and a pre-determined data request. The user clicks on the Document Library link to load the results in the Document Panel.
- **Form Processing:** The user clicks on the Document Library link to open a cover page where a custom data request can be entered. The requested data and the user’s information are used to generate results within the document panel.

**Doc e Serve Job**

When “Self Service Form” is selected, a “Doc e Serve Job” drop-down replaces the unavailable options and displays a list of all of the Jobs in Doc e Serve.

- **NOTE:** This option is only available if Doc e Serve Self Service is available for your organization and the “Self Service Form” option is selected.
Add Images and Scripts
Click the checkbox labeled “Check this to add associated Images, Scripts, and Styles” if they need to be added to the uploaded form. A new window will open (Fig. 10.21).

```
[ ] Check this to add associated Images, Scripts, and Styles.
```

“Browse” for images, scripts, or styles needed for the form being uploaded. Click on the “Add” button to upload the files. A list of all uploaded files will appear in the list-box labeled “Scripts/Images/Styles Uploaded”. To remove a file, click on the file in the list-box and click on the “Remove” button. To remove all files, click on the “Remove All” button. Click the “Close” button to close the window.

Upload Form Help Docs
When a form is sent using “Send Form Email” (page 23), administrators can add attachments to users’ e-mail notifications from Doc e Fill. Form Help Documents can be uploaded to provide these users with general information or instructions for completing a form which is pending in their Received Documents. To have an attachment on a notification e-mail, click on the "Browse" button next to the “Upload Form Help Docs” textbox and locate the document. Click on the “Add” button to upload the file.

```
Upload Form Help Docs: [Browse... Add]
```

The filename will populate the “Uploaded Docs” list-box. To remove an uploaded file, select the file in the “Uploaded Docs” list-box and click on the “Remove” button. To remove all uploaded documents, click on the “Remove All” button. Click on the “Update” button to save all modifications. Click the “Cancel” button to clear the active menu selection.
 Modify Form

To modify information for an existing form, first select the form from the drop-down box labeled “Select Form”. The Form Name and Description fields cannot have any of the invalid characters listed in Appendix B, page 75.

![Modify Form](image)

Administrators can modify most of the settings from the Add New Form screen. Uploaded documents associated with the form can be reviewed in a listbox at the bottom of the module and added or removed from the list.

- **NOTE:** To change the base document (“Choose a Form” from Add New Form) or to allow and disable edits (“Editable” from Add New Form), a new form must be created. If the form will replace an existing form, the previous form should be deleted or inactivated; see page 47.)
Delete Form

To delete a form, first select the form to delete in the “Select Form” drop-down menu. Click the “Update” button. Forms cannot be deleted if it is currently saved, being routed, or archived.

An alert will appear to confirm the deletion, stating “Doing this may adversely affect Users. Do you wish to continue?” (Fig. 10.26). Click on the “OK” button to continue the update. Click on the “Cancel” button to close the alert box without deleting the form.

A form can be inactivated so that users cannot originate a new instance of the form. The current forms that are saved, in route, or archived will not be inactivated.

The message “This form is in use and cannot be deleted. Click on the checkbox to inactivate this form.” and the “Inactive” checkbox will appear if the form cannot be deleted (Fig. 10.27). Click the “Inactive” checkbox, then click on the “Update” button to inactivate the form.
Auto Archive

This section gives the administrator the ability to archive specific forms, specific user’s forms, or all pending Doc e Fill forms. Auto Archival only affects documents already in workflow and only occurs once (this is cannot be a scheduled or permanent setting). Documents created after the Auto Archive is run will continue as usual. By archiving forms in this way, any “hooks” associated with the form will not be activated. If the form sends data to another program/table upon archive, the data will not be sent.

Fig. 10.28

Auto Archive Forms

Select Form:  
Select User:  
Note: Please only run this process when the selected User or Users are not logged in.

Update  Cancel

Depending on the selections in the Auto Archive Forms drop-down menus, forms can be automatically archived after receipt:

<table>
<thead>
<tr>
<th>Select Form</th>
<th>Select User</th>
<th>Result for Documents in Workflow</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>All</td>
<td>All forms and for all users will be archived.</td>
</tr>
<tr>
<td>All</td>
<td>Specific User</td>
<td>All forms for the selected user will be archived.</td>
</tr>
<tr>
<td>Specific Form</td>
<td>All</td>
<td>The selected form for all users will be archived.</td>
</tr>
<tr>
<td>Specific Form</td>
<td>Specific User</td>
<td>The selected form for the selected user will be archived.</td>
</tr>
</tbody>
</table>

Auto Archive Routing Example

Fig. 10.29: A document is waiting in the Received Documents folder of “Time User1003”. This document was sent on 11/30/07 by “Example User 1” and the name of the document is “Test Form”.

Fig. 10.30: On the Auto Archive screen in the Administrative Interface, the document named “Test Form” is selected in the drop-down labeled “Select Form”. The user named “user1003, Tim” is selected in the drop-down labeled “Select User”. The selected document for the selected user will be archived to the originating user’s Completed Archive folder.

Fig. 10.31: Archived documents are always found in the originating user’s Completed Archive folder. The history underneath the document shows that “Example User 1” sent the document to “Tim User1003”. Next it shows that the user “Admin” sent the document to Archive. When Auto Archived, comments are added to the history stating “Auto Archived by Admin”.

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Purge
This area of the program allows the administrator to permanently delete data from Doc e Fill. Deleting items can be done for a number of reasons including:

- Users go through a test period with Doc e Fill before implementing the system and a purge is done to clear out all data when they’re ready to go live.
- Space is running low on a server.
- The institution has Doc e Scan and/or Employee Self Service and doesn’t need to keep track of archived forms in Fill.

The purge function deletes everything based on the selected checkmarks on and prior to the selected date. To purge documents:

1. Click inside the “Select Purge Date” field to open a drop-down calendar and select the starting date for the purge.
2. Click on the checkboxes to enter the items for the purge.
   - Temporary: Removes files from Doc e Fill’s temporary folder on the hard drive.
   - Saved: Removes files from the saved folder. This includes Saved Drafts and Saved Received documents.
   - Pending: Removes documents in routing.
   - Archived: Removes archived documents.
3. Click on the “Update” button. When the confirmation alert appears (Fig. 10.33), click “OK” to continue.
- 11 -
User Administration

The ninth module in the admin navigation panel is the “User Administration” module. The purpose of this module is to add, edit, and delete users. This module also gives administrators the ability to approve or delete any self-registered users.

Search User
The “Search” link under the User Administration module provides the method to search for an existing user by inputting a name, username, or ID number. Selecting a user from the search results will load the Modify User screen, page 52, where the user’s information is available for editing. Click on the “Search” link within the “User Administration” module to open the Search User screen.

To search for an existing user, first select the field to search by clicking on one of the radio buttons in the section “Search By”. The choices to search by are Name, Username, or ID. Input the whole or partial search term into the field provided and click on the “Search” button.

If there are any matching results from the search, a list of users will populate below the “Search By” section. The search results list the ID Number, First Name, Last Name, Username, Email, and Phone Number for each matching user. Select a user from the results list by clicking on his or her information.

Approve User
The “Approve” link under User Administration is where administrators can approve or delete self setup users. The Approve User section is explained in “User Self Setup”, page 21.
New User

The “New” link under User Administration is where administrators can create a new Doc e Fill user.

1. To create a new user, fill in these fields:
   - **First Name**: First Name of the user
   - **Last Name**: Last Name of the user
   - **SSN**: Social Security Number or ID of the user. Must be unique.
   - **Phone**: Phone number of the user
   - **Email**: E-mail address of the user
   - **Username**: The Doc e Fill username of the user: Must be unique.

*The e-mail address requirement is indicated in the “Email Settings” utility (see page 16). The “Use Default” button sets a system default email address in this field.

   - **NOTE**: For field lengths, data types, and invalid characters see Appendix B, page 75. No spaces are permitted in SSN and Username fields.

2. Set Departments, Locations, and Form Groups for the user. For each of these sections, the left list-boxes contain all departments, locations, or form groups. Selected items appear in the list-boxes to the right.
3. If more than one location is selected for the user, select a location from the Default Location field. The user can change this default and the active location later from the user interface.
4. To add items from the left list-box to the right list-box, left-click on a single item from the left list-box or select multiple items by holding down the “Ctrl” key and clicking on them. Click on the “>” button. The selected item(s) will be moved to the right list-box. Click on the “>>” button to move all items from the left list-box to the right list-box. Click on the “<” button to remove selected items from the right list-box. Click on the “<<” button to remove all items from the right list-box.

   - **NOTE**: Form groups will be assigned automatically and moved to the list-box on the right when departments are selected. Administrators can still remove and add form group selections, including these defaults, using the arrow buttons. Refer to page 37 for more information on default departments.

5. The drop-down menu for “User Authentication” is a required field and should be used to assign the authentication type (Database, Customized, LDAP, or Public Portal).
6. The drop-down menu for “User Access Type” is a required field and should be used to assign the access configuration (Default, Public Portal, Custom). See page 17 for more information about access types.
7. Verify the checkbox for “User Reporting”. If the reporting module has been purchased (page 69), by default this is checked and enables the Reporting module for the new user. If unchecked, the user will not see the chart that appears in the top left of the user interface and will not be able to open reports.
8. After the information is entered, click on the “Update” button to add the user. The user will receive an e-mail containing his or her username and password. The e-mail will also provide a link to the Doc e Fill login screen. Click on the “Cancel” button to clear the active menu selection.
Modify User

The “Modify” link under User Administration is where the administrator modifies existing Doc e Fill users (Fig. 11.5). To modify an existing Doc e Fill user, click on the drop-down box labeled “Select User” and select a user. The following fields will populate with the user's information: Username, First Name, Last Name, SSN, Phone, E-mail, Default Location, User Authentication, and User Access Type. All of these fields are editable and can be modified by changing the information within the textbox or selecting a new option from the drop-down list.

The Username, First Name, and Last Name cannot have any of the invalid characters listed in Appendix B, page 75. The Username and SSN fields cannot contain spaces.

When the user is selected from the “Select User” drop-down box, the Departments, Locations, and Form Groups sections will also populate. For each of these sections, the left list-boxes contain all departments, locations, and form groups. The list-boxes on the right contain all departments, locations, and form groups selected for that user. Use the arrow buttons to move these selections between boxes.

- **NOTE:** The initially selected form groups are determined by the defaults for each department. These can be removed again or non-default form groups can be selected through use of the arrow buttons.
Inactive User
Administrators also have the ability to inactivate a user (Fig. 11.6). When a user is inactivated, they cannot log in to Doc e Fill. To inactivate a user, click on the checkbox labeled “Inactive” (Fig. 11.7). A list-box labeled “Select Forwarding User” will open, giving the ability to set a forwarding user. A forwarding user is a user who can log in as the inactivated user and administer their account. The inactivated user’s account is accessed by entering the inactivated user’s username, the forwarding user’s password, and last four digits of the forwarding user’s ID or SSN. Confirmation e-mails will be sent to both users.

![Fig. 11.6](image1)
![Fig. 11.7](image2)

Click on the “Update” button to save all modifications to that user. An alert box will open, notifying the administrator of possible blank steps in the routing upon saving. Click on “OK” to continue updating the user or click on “Cancel” to cancel the update.

Delete User
The “Delete” link under User Administration is where administrators can delete existing Doc e Fill users. If the user to be deleted currently has a document in routing, he or she can be inactivated instead and another user can be set to receive the document.

![Fig. 11.8](image3)

To delete an existing Doc e Fill user, select the user from the drop-down box labeled “Select User”. Click “Update” to delete the user. If the user exists in any routing, an alert box will remind the administrator that there may be blank steps in the routing. Click on “OK” to delete the user or click on “Cancel” to cancel the delete.
**Inactive User**
Administrators will not be able to delete a user if there is a form currently in route for that user or if the user has archived documents. The user can only be inactivated. The following message will appear if the user cannot be deleted: “User has documents in use and cannot be deleted. To Inactivate the User please click the Checkbox.” The “Inactive” checkbox becomes available, giving the ability to inactivate the user from the Delete screen.

Once the checkbox is checked, the “Select Forwarding User” list-box will appear. The purpose of selecting a forwarding user is for archiving documents and tracking any forms that may still be pending. The forwarding user can log in as the inactivated user by typing in the inactivated user’s username, the forwarding user’s password, and last four digits of the forwarding user’s ID or SSN on the login screen.

Select a person from the left list-box and click on the “>” button to assign the user as the forwarding user. The forwarding user will be removed from the left list-box and be added to the right list-box. Click on the “<” button to remove the forwarding user from the right box. Click on the “Update” button to inactivate the user and activate the forwarding user. Click on “Cancel” to clear the active menu selection.
The tenth module in the admin navigation panel is the “Form Group Routing” module. The purpose of this module is to create, modify, and delete routing for form groups. It is also possible to make a route configuration auto-updateable. If a route configuration is auto-updateable, any change to a user’s location will automatically be reflected in the routing.

**NOTE:** Users, locations, departments, forms, and form groups must all be set up prior to working with Form Group Routing, as these are all used in the process.

To assist in the explanation of routing, the following table defines the structure that is used in the screenshots and explanations in this chapter. All examples are used for illustration purposes. View the workflow of the example in Fig. 12.8.

<table>
<thead>
<tr>
<th>User Name</th>
<th>Location</th>
<th>Department</th>
<th>Manager (Location/Dept)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example User 1</td>
<td>Location</td>
<td>Department</td>
<td>N</td>
</tr>
<tr>
<td>Example User 2</td>
<td>Location</td>
<td>Department</td>
<td>N</td>
</tr>
<tr>
<td>Example User 3</td>
<td>Location</td>
<td>Department</td>
<td>Y (Location – Location)</td>
</tr>
<tr>
<td>Example User 4</td>
<td>Location</td>
<td>Department 2</td>
<td>N</td>
</tr>
<tr>
<td>Example User 5</td>
<td>Location</td>
<td>Department 2</td>
<td>N</td>
</tr>
<tr>
<td>Example User 6</td>
<td>Location</td>
<td>Department 2</td>
<td>Y (Department – Department 2)</td>
</tr>
</tbody>
</table>

**Add/Modify Form Group Routing**

The “Add/Modify Form Group Routing” link under Form Group Routing is where administrators create and modify routing. Each route is defined by the combination of form group and location. Click on the “Add/Modify Form Group Routing” link within the “Form Group Routing” module to open the Configure Group Routing screen.

![Configure Group Routing](image)
Figure 12.3 breaks down the different tools within the Configure Group Routing screen. These are referenced by letter in the instructions for routing setup and editing.

A. Group and Location drop-downs  
B. Auto Updateable checkbox  
C. Department and Document Management checkboxes  
D. View selection icon  
E. Include Always checkbox  
F. Allow Archive checkbox  
G. Notify Email checkbox  
H. Delete Destination checkbox  
I. Department list-box  
J. Users list-box  
K. Copy to Location button and drop-down  
L. Configure buttons

Create New Route or Open Existing Configuration

To open an existing route for editing:  
1. Select the form group in the drop-down box labeled “Select Group” (A).  
2. Select the location in the drop-down box labeled “Select Location” (A).  
3. If a route configuration exists in Doc e Fill for the selected form group and location, the configuration will appear below the “Auto Updateable” checkbox (B).  
4. If there is no route configured for the selected form group and location, then nothing will populate under the “Auto Updateable” checkbox (B).
To create a new route:

1. Select the form group and location at the top and click on the “Add More Destinations” button (L) at the bottom.
2. A label named “Origin” will appear with checkboxes (C) labeled “Department” and “Doc. Mgmt.” below it. A list-box of users is on the right.
3. To the right of the list-box are the “Include Always” (E), “Allow Archive” (F), “Notify Email” (G), and “Delete Destination” (H) checkboxes.

The users who appear in the list-box (J) are all users located in the selected location at the top. The user will appear in the box if they have the selected location at the top also selected in their location under User Administration, page 50. All users who are selected at the origin will start the route. The user can only start off a form if they have the form group selected at the top also selected in their form groups under User Administration.

---

![Select Group and Location](image1)

**Fig. 12.4:** Some users in the location “Location” will start off the route. After selecting the form group “Form Group”, we selected “Location” from the “Select Location” drop-down box. The “Add More Destinations” button (L) will add the originating destination. With neither checkbox (C) marked on the left, all users in the location “Location” will populate the list-box in the “Origin” section. By default, all users are selected. To de-select users, hold down the “CTRL” key on the keyboard and click on the names to remove. In this example, “Example User 3” and “Example User 6” were de-selected. The users highlighted in this box are able to begin the routing for the form.

**Doc. Mgmt. Checkbox**

The checkbox labeled “Doc. Mgmt.” will filter out users who are not managers. If the “Department” checkbox is not checked and the “Doc. Mgmt.” checkbox is, all managers for the selected location will populate in the list-box (J). To see how to select managers for a specific location, refer to the Add/Modify Location Manager section on page 31.

**Fig. 12.5:** Click again on “Add a Destination” (L) and select the “Doc. Mgmt.” checkbox to add a new step to the routing and only set the manager(s) for the location. In this example, the location manager is “Example User 3”. Now the routing is set up to go from the users selected in the origin to “Example User 3”. 

![Destination](image2)
Department Checkbox

The checkbox labeled “Department” will open a list-box (I) with the list of all Departments associated with the selected Form Group at the top. To associate the Department to the Form Group, add the Department to the list of default departments for that Form Group, found in the Modify Form Group module (page 36).

![Department Checkbox](image)

**Fig. 12.6**: For this example, another destination is added and the “Department” checkbox is checked to show the list of departments (I) associated with “Form Group”. Choosing only the “Department 2” department brought up all users in that department (J). By default, all users are selected. De-select a user by holding the “CTRL” key on the keyboard while clicking on the user’s name, for example, “Example User 6”. Now the routing will flow from “Example User 3” from the previous step to either “Example User 4” or “Example User 5”.

Department and Doc. Mgmt. Checkbox

When both “Doc. Mgmt.” and “Department” checkboxes are marked, only users who are managers for the selected department will populate in the user’s list-box (J). These users must also be located in the same location selected in the drop-down labeled “Select Location” at the top. To assign managers for a specific department, go to the Add/Modify Department Manager feature (page 33).

![Department and Doc. Mgmt. Checkbox](image)

**Fig. 12.7**: This example adds a fourth destination and selects both “Department” and “Doc. Mgmt.” checkboxes. Only the “Department 2” department is selected. The user who populates the list-box (J) is the manager for the department “Department 2”. At this point in the routing, the previous step’s users, “Example User 4” and “Example User 5”, can only send the document forward to “Example User 6”.

View Selection

The magnifying glass icon to the right of the user list-box is a tool that opens a new window to show the administrator for that destination.

![View Selection](image)

Include Always

The “Include Always” radio buttons to the right of the user list-box is to help in special routing scenarios. If the “Include Always” radio button is set to “Yes” for a specific destination, the selected users in the list-box will show up in the destination drop-down box for all stages of routing.
Allow Archive

The checkboxes in the “Allow Archive” column can be marked to allow the users at the specified routing level to archive a document prior to the final step of the routing process. If the checkbox is cleared, no archival option will be present in the destination drop-down menu on the Document Control Panel (Appendix A, page 74). The checkbox is unavailable for the first routing step as archival is disabled for the originating user. The final step in routing always archives documents.

Notify Email

The “Notify Email” checkboxes can be marked to allow an automated e-mail to be sent to users other than the originator upon archival of the document. All users in the routing at the stage where the checkbox is activated will receive the e-mail, which will state who the originator was and who archived the document. The checkbox is unavailable for the first routing step as e-mails are automatically sent to the originator. Please note that if the user selected to receive e-mails does not have a valid e-mail address for his or her account, the archival message will not be sent. Examples of Doc e Fill system e-mails can be found in Appendix B of the User Manual.

Delete Destination

The purpose of the “Delete Destination” checkbox is to remove a destination from routing. Click on the “Delete Destination” checkbox of the row to be deleted and click on the “Delete” button at the bottom of the screen. After deleting a row, the route configuration will not save until the “Update” button is pressed.

Copy To Location

The “Copy To Location” button is a way of copying the current route structure to another Doc e Fill location. The structure of the configuration that is copied refers to the Department and Doc. Mgmt. checkboxes (C), the selected Departments (G), and the Include Always checkbox (E).

To copy a structure to another location:
1. Select the Group and Location from the drop-down menus at the top (A).
2. Click on the drop-down next to the “Copy to Location” button.
3. A list of all Doc e Fill Locations will populate the drop-down list.
4. Select a location and click on the “Copy to Location” button.
5. The current route configuration will be saved.
6. The copied route configuration now populates the selected location, but the route will not be saved until the “Update” button is pressed or the configuration is copied to another location.
Configure Buttons

The following buttons are located at the bottom of the Configure Group Routing screen:

- **Add More Destinations**: Adds a destination to the configuration.
- **Delete**: Deletes any destination with the checkbox checked under the “Delete Destination” column.
- **Update**: Saves all changes to the configuration.
- **Preview**: Opens a new window which gives a graphical view of the current configuration.
- **Cancel**: Clears the active menu selection without saving.

*Fig. 12.8*: Click on the “Preview” button to see a graphical display of the routing. This lists all steps of routing including who is selected in each routing stage.

![Fig. 12.8](image)

### Auto Updateable

If there is a user who is added or modified into a location where there is an auto updateable route configured, then the user will automatically be placed in the route according to the user's department and/or manager status.

Every user in the user list-box will be included in the routing on auto updateable configurations. No users can be deselected from the routing. When the “Auto Updateable” checkbox is checked, the user list-box is hidden at every step of routing (Fig. 12.9).
If the auto updateable checkbox was selected for the current example route (shown in the table at the beginning of this chapter), the route would look like Fig. 12.9 and the preview of the route would look like Fig. 12.8.

To have a successful route configuration, each user in the route can only exist once in the configuration. If a user receives a document in Doc e Fill, the configuration will treat the user’s route by the first instance of the user. For example, if the user shows up in Destination 1 and Destination 2, then the user will only have route options as the user would in Destination 1. This is especially important to note for managers.

To make the example route correct and functional for auto update, more departments must exist to filter users. When referencing the previous routing table for this example, we can see that there must be changes to the two manager’s departments. These alterations are shown on the table on the following page.

<table>
<thead>
<tr>
<th>User Name</th>
<th>Location</th>
<th>Department</th>
<th>Manager (Location/Dept)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example User 1</td>
<td>Location</td>
<td>Department</td>
<td>N</td>
</tr>
<tr>
<td>Example User 2</td>
<td>Location</td>
<td>Department</td>
<td>N</td>
</tr>
<tr>
<td>Example User 3</td>
<td>Location</td>
<td>Department 3</td>
<td>N</td>
</tr>
<tr>
<td>Example User 4</td>
<td>Location</td>
<td>Department 2</td>
<td>N</td>
</tr>
<tr>
<td>Example User 5</td>
<td>Location</td>
<td>Department 2</td>
<td>N</td>
</tr>
<tr>
<td>Example User 6</td>
<td>Location</td>
<td>Department 4</td>
<td>N</td>
</tr>
</tbody>
</table>
The following images show how the routing will appear in the Configure screen after the above changes have been made:

- **Fig. 12.10**: Before auto updateable checkbox is checked
- **Fig. 12.11**: After auto updateable checkbox is checked
- **Fig. 12.12**: Preview of route configuration
Delete Form Group Routing

The “Delete Form Group Routing” link under Form Group Routing is where the administrator can remove existing route configurations. Click on the “Delete Form Group Routing” link within the “Form Group Routing” module to open the Delete Group Routing screen.

- **NOTE:** Use caution when deleting form group routing. The route configuration will be deleted and any document currently being routed will not be able to go forward.

![Delete Group Routing](image)

Fig. 12.13

To delete an existing route configuration, select the form group in the “Select Group” drop-down box and select the location from the “Select Location” drop-down box. Click on the Update button to delete the configuration. An alert box will open stating “Doing this will void the current group’s workflow and may result in abandoned forms. Do you wish to continue?” (Fig. 12.14). Click on the “OK” button to continue the update. Click on the “Cancel” button to close the alert box without saving.

![Alert Box](image)

Fig. 12.14
# Routing Scenarios

The following table describes what the user will see when sending a document at different stages and configurations of routing. The Destination drop-down is shown in the Document Control Panel, Appendix A, page 74.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Example (non-admin)</th>
<th>Scenario</th>
<th>Example (non-admin)</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the user is originating a form and the configuration has only one user selected in the first destination after origin, the user will only have a choice to send the document to &quot;Route&quot;. Note: This is the default workflow path.</td>
<td><img src="image" alt="Fig. 12.15" /></td>
<td>If the user is originating a form and the configuration has multiple users selected in the first destination after origin, the user will have a choice to send the document to anyone selected in the destination's user list-box.</td>
<td><img src="image" alt="Fig. 12.16" /></td>
</tr>
<tr>
<td>If the user has received a document and the configuration has only one user selected in the next destination, then the user sending the document will have a choice to send it to History, Archive, or Route.</td>
<td><img src="image" alt="Fig. 12.17" /></td>
<td>If the user has received a document and the configuration has multiple users selected in the next destination, then the user sending the document will have a choice to send it to History, Archive, or any user selected in the destination's user list-box.</td>
<td><img src="image" alt="Fig. 12.18" /></td>
</tr>
<tr>
<td>If the user is originating a form and there is no destination or no route configuration set up, the user will have no choice to send the document.</td>
<td><img src="image" alt="Fig. 12.19" /></td>
<td>If the user is approving a form and they are in the final destination of the configuration, the user will only have the choice to send the document to History or Archive.</td>
<td><img src="image" alt="Fig. 12.20" /></td>
</tr>
<tr>
<td>If the user is approving a form and they select history, the drop down will populate with all users who have previously received and approved/denied the document.</td>
<td><img src="image" alt="Fig. 12.21" /></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Doc e Scan Configuration

The eleventh module in the admin navigation pane is the “Doc e Scan Configuration” module. This module is only available if the organization is using Doc e Scan with Doc e Fill. It allows administrators to set up exports for archival using Doc e Scan and to determine whether or not attachments from Doc e Scan will be saved in Doc e Fill upon completion of Workflow.

The addition of Doc e Scan to the Doc e Fill system introduces Workflow documents, items which are initially scanned into or uploaded to the archival system of Doc e Scan then attached to a cover page in Doc e Fill and passed through routing. For more information on Doc e Scan cover pages, see page 42.

Export Settings

This administrative section sets up when the Doc e Fill documents will export into Doc e Scan. As Doc e Fill documents are archived, the document can then be filed into Doc e Scan if desired.

These settings can be applied for archival to Doc e Scan:

- **Never**: When this option is selected, archived documents will never be filed into Doc e Scan.
- **Archive Approve Only**: When this option is selected, only the documents which have been approved and archived will be filed into Doc e Scan.
- **Archive Deny Only**: When this option is selected, only the documents which have been denied and archived will be filed into Doc e Scan.
- **Always**: When this option is selected, both approved and denied documents will be filed into Doc e Scan upon archive.

Select an option and click on the “Update” button to save the settings. Click on the “Cancel” button to clear the active menu selection.
New Export Path
When archiving to Doc e Scan, a form can be exported with a control file and its attachments into a specified folder. The folder is then used by the Doc e Scan Import utility to identify new files for archival. The “New Export Path” selection contains a field where the name of the folder can be set. Clicking “Update” will add the new export path to the “Doc e Scan Filing Location” drop-down list on the Add and Edit Form screens. Doc e Fill creates the folder when the first form is sent to be archived into Doc e Scan using the selected export path.

![Add Doc e Scan Export Path](Fig. 13.3)

- **NOTE:** Both the Doc e Scan import settings and the Doc e Fill form must be configured to use the folder in order for the process to work properly.

Modify Export Path
The “Modify Export Path” section of the Scan Admin Configuration module allows for the path name to be changed. Files waiting for import into Doc e Scan will remain in the renamed folder and forms in process when the modification occurs will automatically export to the renamed location.

Click on the drop-down list labeled “Select Scan Export Path” to locate the name which will be changed. The existing name will load in the field below where it can be edited. After editing, click on the “Update” button to save the new name.

- **NOTE:** The Doc e Scan import settings must be updated to reflect the change or the import will not succeed. A reminder of this change appears under the field where the path is renamed.

- **NOTE:** Export paths can be inactivated by clicking on the “Inactive” checkbox. Inactivated export paths are not available in the “Doc e Scan Export Path” drop-down list for Doc e Fill forms.

![Modify Doc e Scan Export Path](Fig. 13.4)
Assign Export Path

The “Assign Export Path” utility forms to be quickly reassigned to a different export path. Individual form settings can be edited using the Modify utility under Form Administration (page 36). Use of this area of the Administrative interface, however, includes changing multiple form export paths at the same time. It is also used if an export path needs to be inactivated. The path cannot be inactivated unless all forms assigned to the selected export path are reassigned to a new path.

![Assign Doc e Scan Export Path](image)

Fig. 13.5

1. Select the folder name from the “Select Export Path” drop-down list.
2. Select one or more forms from the listbox. To select more than one form at a time, hold “Ctrl” and click on the desired forms.
3. Select another export path name from the “Select New Export Path” drop-down list.
4. Click “Update” to save the changes.
Workflow Attachment Settings
By using the “Workflow Attachment Settings” selection, administrators can change the archive settings in Doc e Fill. Clicking on the radio button next to “Always” will save the entire Workflow document package into the originating user’s Completed Documents. Selecting “Never” will only store the cover page. If “Never” is chosen, the original document is only removed from Doc e Fill and can still be recovered in Doc e Scan. The original document is referenced on the cover page in both scenarios so it can be located later within Doc e Scan.

![Save Doc e Scan Workflow Attachments](image)

Click on the option then click on the “Update” button to save the change. Click on the “Cancel” button to clear the active menu selection.
The last module in the admin navigation panel is the “Reporting Configuration” module. This module allows the administrator to create, modify, and delete reports in the system. To allow users access to reports, Users, Locations, Departments, and Form Groups can be set individually or at the same time. Global settings for date ranges available for lookup on reports can also be changed here.

**NOTE:** The reporting module is purchased separately from the base Doc e Fill configuration. The module includes user reporting, default reports, and administration options for forms and users. Please contact Softdocs for more information.

### New

A new report can be added to the system using this utility. Three default reports are included with the reporting module. Please contact Softdocs for information regarding additional custom reports.

![Add New Report](image)

The “Report Name” must be unique and cannot be named the same as a default report even if the default report is not in use. The default reports are: My Action Summary, My Activity Detail, and My Form Activity. The “Description” field is optional and can be used to provide a brief description of the report. The “Choose a Report” field can be used to browse for an existing report template. Only an HTML file can be used.

**NOTE:** For more information about the default reports, please refer to the user manual for Doc e Fill.
Modify
Custom report listings in Doc e Fill can be edited by opening the “Modify Report” utility. Before the report can be edited, the report must be selected from the “Select Report” drop-down list. The three default reports (My Action Summary, My Activity Detail, and My Form Activity) cannot be modified.

The report name must still be unique when modified and cannot be named the same as one of the default forms. The description can also be changed. Click on the “Update” button to apply the changes.

An Inactive checkbox can be marked to remove the report from the assignment list. This prevents the report from being made available to any user and removes it from the report list for all users who previously had access to the report.

Delete
Custom reports can be removed by opening the “Delete Report” utility. Before the report can be deleted, the report must be selected from the “Select Report” drop-down list and must not be assigned to any area. The three default reports (My Action Summary, My Activity Detail, and My Form Activity) cannot be deleted. Select a custom report from the Select Report drop-down list and click “Update”.

- **NOTE:** When a report is deleted, this deletes database records and actual files from the drive. If the administrator intends to remove the report temporarily, open the Modify utility instead and select “Inactive”. The report can also be backed up to another location prior to deletion.
Assign Report

Custom and default reports which are currently active can be assigned to users, locations, departments, and form groups using the “Assign Report” utility. Select a report from the drop-down list (Fig. 14.5) to load the assignment area (Fig. 14.6). The report’s name and description cannot be edited in this utility.

![Fig. 14.5](image)

**NOTE:** Users who have been inactivated will lose assigned report settings. If the user is then reactivated, the user must be given access to the necessary reports again if they will be allowed to access reports again.

To assign the report, Location and Form Groups are required to be selected. The list boxes on the left indicate unselected items and the list boxes on the right indicate selected items. Click on an item in the box and use the arrows underneath each box to move them as needed. The “<<” button deselects all items, “<” removes one item from the selection, “>” adds one item to the selection box, and the “>>” button selects all items.

The report in Figure 14.6 has “Advanced Settings” unchecked. This is the equivalent to “auto-updatable” in routing. Any user added/modified with the selected location/department combination will receive the selected report. The selected report will reflect on the form groups selected.

![Fig. 14.6](image)
If Advanced Settings is checked, the “auto-updatable” feature is disabled. This setting allows Users and Forms to be selected.

![Assign Report](Image)

Location and Department selections narrow the user list. The administrator can specifically select users who will see the selected report. Form Group selections narrow the form list. The administrator can specifically select forms to show the selected users when the report is loaded.

**Report Settings**

The “Setup/Modify Report Settings” utility allows the administrator to change the system defaults for date ranges used when viewing reports. Enter the number of days to allow and click on the “Update” button to make the change.

![Setup/Modify Report Settings](Image)

**Default reports to display the previous # days**

This affects each user’s default date range for reports. A larger number of days to report on will result in a longer time to load the page. Users can enter a custom date on the report once loaded. The "My Action Summary" report only displays the past 365 days from the date the report is loaded.

**Maximum viewable days**

This affects the maximum number of days a user can select between date ranges. The user’s default range in the user’s custom settings must be lower than this number. When setting a custom date range in the report, the user cannot load more than the maximum number of days available from the calendar. If this field is blank, the default system setting will be 365 days.

**Show Display Field column**

Checking the box for this option adds a column to the report for the contents of the "display field" designated for the form (see Display Field Number, page 40). The "Show Display Field in Reports" checkbox must also be checked on the designated form to display the information in the column.
Help Documentation and Logout

Documentation for Doc e Fill is accessible through the administrative side of the program by clicking on the appropriate link in the top right corner of the admin screen.

The “Administration Manual” link will open a PDF of this manual in a new window. The “User Manual” link will open a PDF manual for the user side of Doc e Fill in a new window.

To exit out of Doc e Fill Administration, click on the “log out” link at the top right. This will log the administrator out of Doc e Fill and return to the login screen.

Please be sure to log out after the completion of administrative tasks. Failure to do so may result in a timeout error.
Appendix A: Doc e Fill User Panels

A. **Navigation Panel**: This panel is where the navigation icons reside and the selected menu opens once an icon is pressed.

B. **Document Panel**: This panel is where documents are viewed and information is typed into the document.

C. **History Panel**: This panel shows the current status and history of the document being viewed in the Document Panel.

D. **Document Control Panel**: This panel is where users would go to control the document being viewed in the Document Panel. The Document Control Panel controls sending a form, adding attachments, saving a form, and also adding comments.
Appendix B: Administrative Fields

Administrative Field Lengths
The following is a list of field lengths. These are the maximum number of characters that the Doc e Fill database holds.

<table>
<thead>
<tr>
<th>Field Label</th>
<th>Data Type</th>
<th>Field Length</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location Name</td>
<td>Alpha-numeric</td>
<td>50</td>
</tr>
<tr>
<td>Department Name</td>
<td>Alpha-numeric</td>
<td>50</td>
</tr>
<tr>
<td>Form Group Name</td>
<td>Alpha-numeric</td>
<td>50</td>
</tr>
<tr>
<td>Form Name</td>
<td>Alpha-numeric</td>
<td>50</td>
</tr>
<tr>
<td>User First Name</td>
<td>Alpha-numeric</td>
<td>25</td>
</tr>
<tr>
<td>User Last Name</td>
<td>Alpha-numeric</td>
<td>30</td>
</tr>
<tr>
<td>User SSN (ID #)</td>
<td>Numeric</td>
<td>9, no spaces</td>
</tr>
<tr>
<td>Username</td>
<td>Alpha-numeric</td>
<td>30, no spaces</td>
</tr>
<tr>
<td>User Phone</td>
<td>Numeric</td>
<td>10</td>
</tr>
<tr>
<td>User E-mail</td>
<td>Alpha-numeric</td>
<td>50</td>
</tr>
<tr>
<td>User Password</td>
<td>Alpha-numeric</td>
<td>Minimum of 4</td>
</tr>
</tbody>
</table>

Invalid Characters
The following is a list of invalid characters for field entries:

! @ # $ % ^ & * ( )
~ ` , < > / \ ? ; :
| [ ] + { } ~
Appendix C: Terminology

Active Document
The document or form that is shown in the Document panel.

Active Panel
Left-click on a panel to “activate” it. This tells Doc e Fill which panel is being worked with. Active panels are particularly important for the Search feature.

Cover Page / Workflow Document
A form which uses cues from Doc e Scan to route a document package through the review process. Mandatory fields for cover pages include the Workflow ID and one set of Key Fields.

Doc e Fill Configuration
How the Doc e Fill system is set up by both Softdocs and the Doc e Fill Administrator. The configuration determines which features are available, how the screens will appear, and which documents are available throughout the system. Screenshots in this document cover some of the variations available; others are described in the text.

Doc e Scan
An electronic archival and imaging system programmed and designed by Softdocs.

Doc e Serve
A document output solution programmed and designed by Softdocs.

Document
An electronic file that can be read by Doc e Fill. These contain information that can be passed to other users as an attachment, form, or non-editable file.

Document List
The bottom half of the Navigation Panel which displays the names of documents the user has access to. The top of the list has a purple bar which contains the Document List Toolbar (see below) and the name of the open list. Clicking on the name of a document in the white space below the purple bar will open it in the Document panel.

Document List Toolbar
The top of the purple bar which controls the appearance and order of the documents shown on the Navigation Panel. The Document Library allows for collapsing and expanding; the other Document Lists let users to sort by different means (i.e.: form name, sender name, etc.).

Due Date
An item on a form or workflow document which indicates the date by which the routing for the document should be completed and archived.

Export Path
A folder location used when archiving to Doc e Scan. The folder is named on the administrative side of Doc e Fill and searched for new files when importing forms and their attachments to Doc e Scan.
Field
An empty box or rectangle (i.e.: shown on a form, on the change password screen, etc.) that can be left-clicked on in order to enter typed information.

Form
A specific kind of document which contains spaces to be filled out.

Form Group
Categories of documents available to a user to read or fill out.

Forwarding User
A user in the Doc e Fill system who is receiving another user’s documents and e-mail while the user is away for an extended period of time. This is determined by the Doc e Fill Administrator.

Icon
An image that represents a function within the program. The icons shown across the top of the Navigation panel can each be clicked on like a button to progress through Doc e Fill.

Inactive User
A person away from Doc e Fill for an extended period of time who has had his or her documents and e-mail passed on to another user in his or her absence. The Doc e Fill Administrator is in charge of deactivation and re-activation of user accounts.

Inbox
Another name for the Received Documents list. Doc e Fill opens to this list of documents first so users can quickly see what other users have sent them.

Key Fields
Identifiers used to re-file a workflow document package to Doc e Scan. These are also used within Doc e Scan as search terms.

Module
An additional package that can be purchased to add on to the functionality of Doc e Fill.

Originated/Originator
The user who created a new document from the Library and began the routing process.

Panels
The four sections referenced in the second chapter: Navigation, Document, History, and Document Control. Each one has a different function for Doc e Fill.

Public Portal
A module which adds functionality for a publicly accessible version of Doc e Fill using authentication for a specific kind of user. Public Portal does not allow access to user functionality, saving of drafts, or access through a standard login screen.

Route/Routing
To send a document through the workflow.
Workflow
The path from user to user which documents must follow for purposes of confirmation, evaluation, approval, etc. The workflow setup within Doc e Fill is done by the Doc e Fill Administrator; the design is based on the actual hierarchy of the organization.

Workflow Document Package
A special document or set of documents from Doc e Scan which can be attached to a cover page form. Each one is packaged in Doc e Scan so that it can contain multiple documents from that system but be sent as a single document through routing in Doc e Fill.

Workflow ID
A randomly generated number which is attached to a workflow document package. It is used first to keep the association between cover page and document package in Doc e Fill and then to send the document package to Doc e Scan for archival.