What's New in DocLink 4.0?

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The contents of this manual are believed to be current and accurate as of its date of publication. Changes to this information since printing are published in the software release notes.

As each DocLink implementation is likely to be unique in its requirements and business processes, users of this document are always advised to discuss the content of this document with their Altec Customer Care Manager.

We welcome user comments and reserve the right to revise this publication and/or make improvements or changes to the products or programs described in this publication at any time, without notice.

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DocLink

This release provides a complete web client for all user functionality including:

- full index and re-index capability
- a new integration enabler for linking to your ERP
- workflow supervisor
- workflow delegation
- the ability to export search results

We've also added some great tools so your administrator can make your first use of DocLink Web even easier:

- The Administrator can specify the default options and a default order of search results columns in the web client system wide. Once logged in, the user can modify the settings.
- The Administrator can configure properties as hidden (which means they won't be displayed in the web client's property list in advanced search or as a column in search results). Some properties are important for use in Smart Forms or your ERP integration – but not useful when searching or sorting documents. Those properties can now be configured as hidden properties, so they don't get in the way while you're looking for documents.

DocLink 4.0 also includes a new data gateway that allows Altec's pre-packaged integrations with on-prem ERPs to work in DocLink Cloud. That means that if you migrate to DocLink Cloud, your current screen integrations and GL Smart Form can operate with your on-premise ERP. If your organization has been contemplating a move to the cloud, this DocLink release may open some new opportunities for you.

And for those of you utilizing our SDK, we've added a REST Integration API. This web API allows you to create, retrieve and delete entries for transfer of data to and from DocLink – and it's available for DocLink on-premise and DocLink Cloud users. You can also add documents to the DocLink repository and retrieve documents by DocID utilizing this API.

Please note that DocLink is a modular system. If you have any questions regarding the specific modules required for any of the functionality described in this document please contact Lori Corbino, Customer Care Manager, at loricorbino@altec-inc.com.

Hardware and software requirements are specified in the 'DocLink 4.0 Requirements Guide.'

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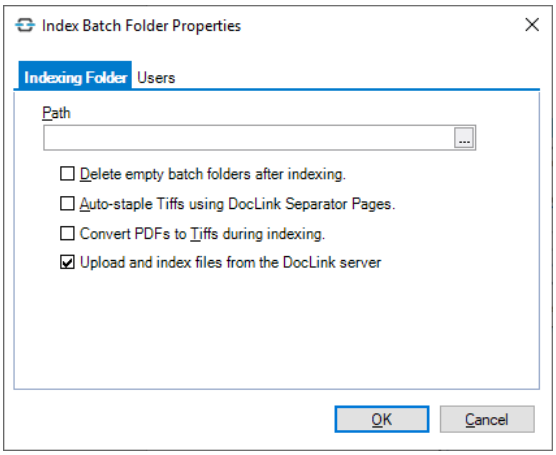
Indexing in web client

Configuration of batch folders

Because the DocLink web client cannot browse to directories from within a browser, a new option has been added to the configuration of index batch folders.

The administrator can now configure a batch folder to upload files to the DocLink server (shown below). When files are placed in a batch folder configured with this new option, the files will be uploaded to the DocLink server. When the user selects a batch from that directory, the contents of the batch are presented to the user.



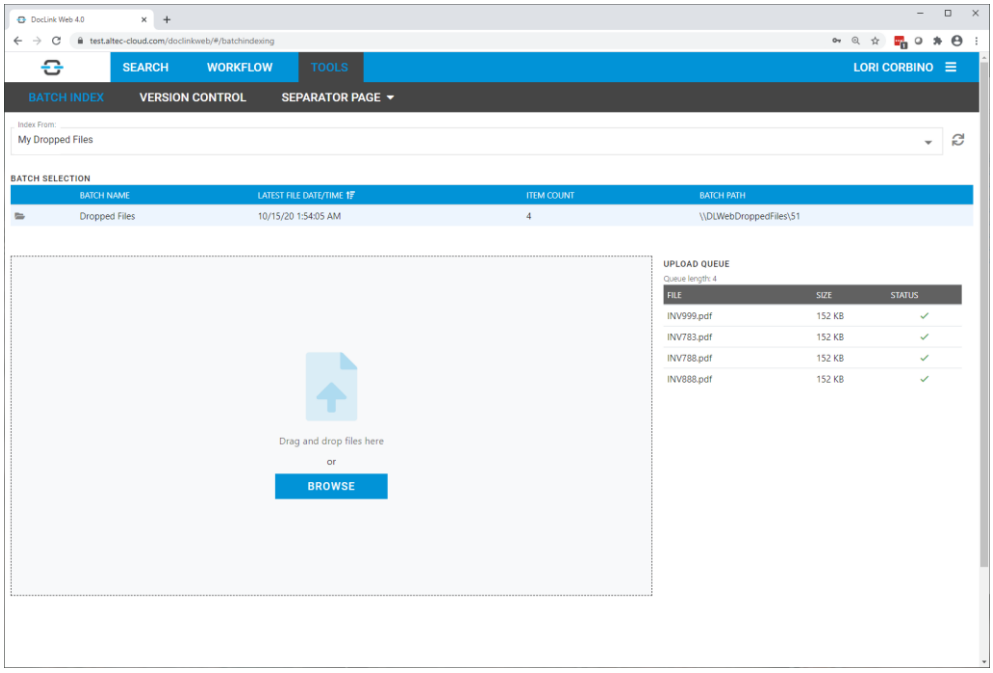
Users indexing from the DocLink web client have access to indexing folders configured for upload to the DocLink server.

Users indexing from the DocLink smart client have access to indexing folders configured for upload to the DocLink server, as well as batches that have not been uploaded to the server (batches still located on their local network).

Selecting documents for indexing

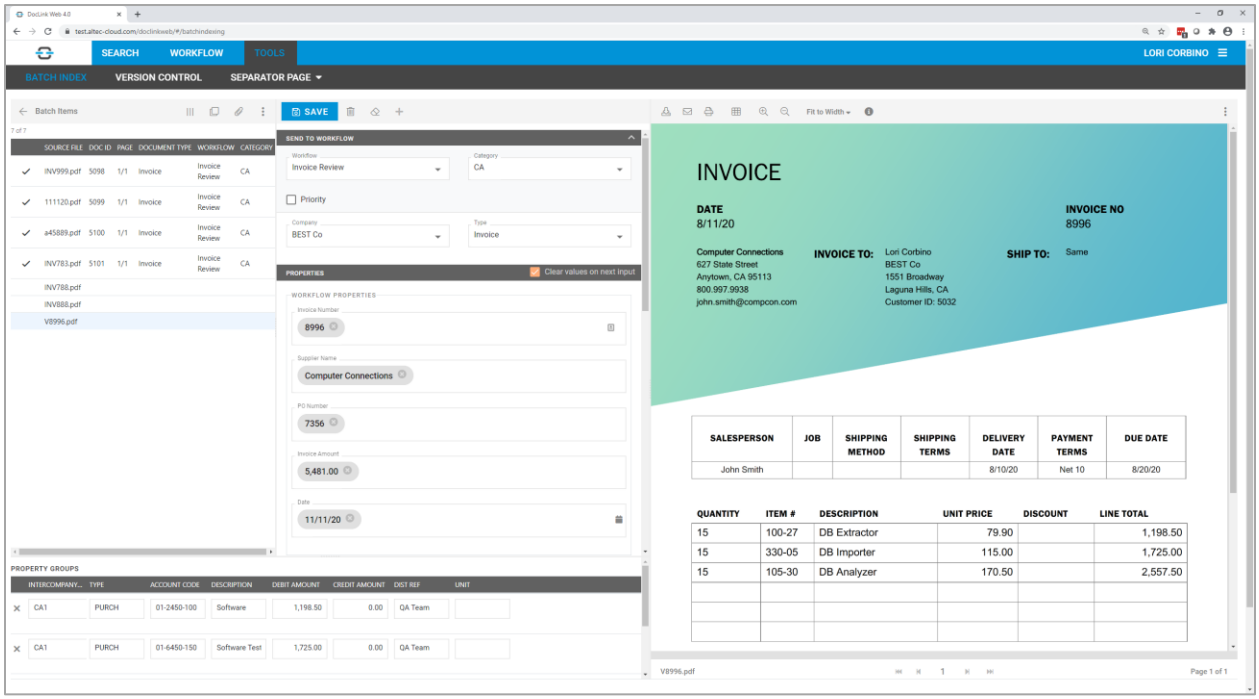
Selecting a batch for indexing in the web client works similarly to the smart client, with the following exceptions:

- The batch grid in the web client displays the most recent date and time that the folder's contents were updated (rather than the date and time the folder was created).
- Drag-and-drop indexing is available in the web client, but it works differently. The user logs into the web client, navigates to the Batch Index tab, selects 'My Dropped Files' and drags the files onto the web page. The user also has the option to also browse to the files.



Indexing documents into DocLink

Batch indexing in DocLink Web is very similar to indexing in the Smart Client but has been modified to make the best use of the browser real estate. In the screenshot below, batch navigation is displayed on the left side of the page, properties are displayed to the right of the navigation pane and property groups are displayed across the bottom.

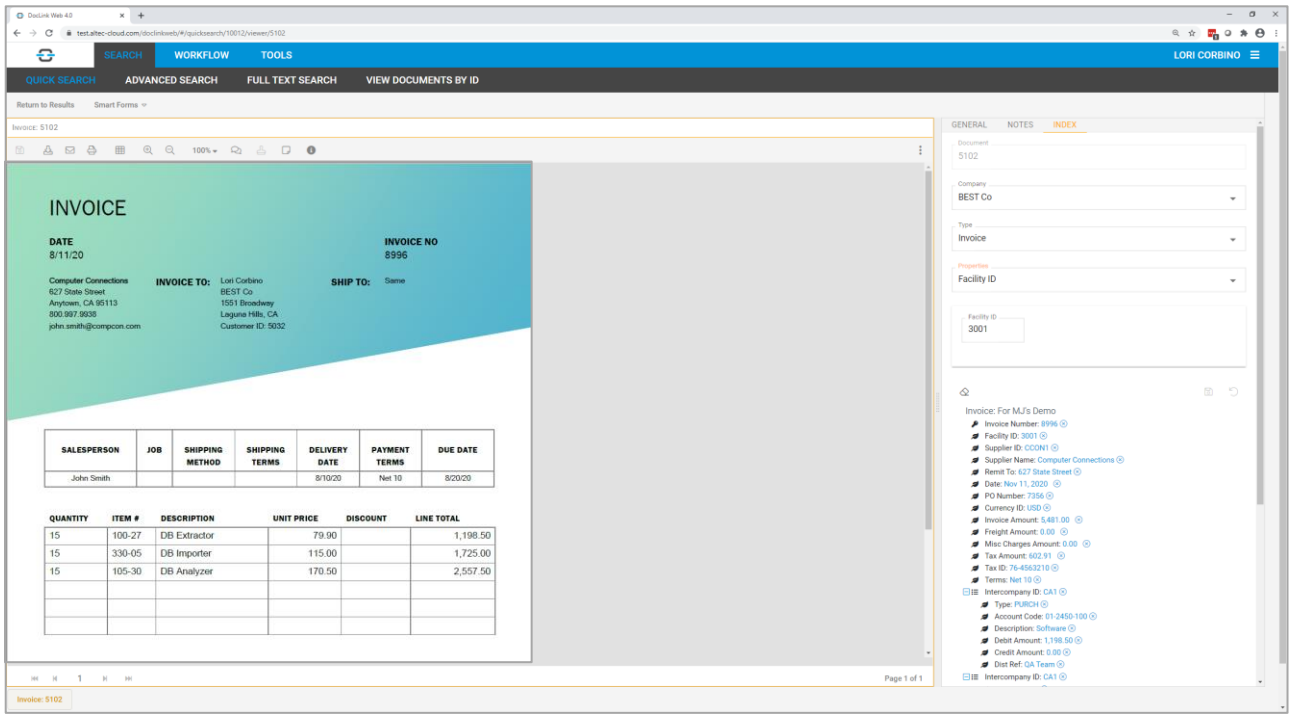


The page can be laid out based on user preference:

- A batch pane can be displayed on the left side of the page that lists all the files in the batch.
- The width of the properties pane and height of the property group pane can be modified using the slider bar.
- Thumbnails can be displayed in the viewer.

Re-indexing documents

Users with re-index permissions can modify a document's property values from the Index tab. To modify a property value, select that property from the list and edit in the highlighted text box. To enter a new property value, select the property from the Properties drop-down and enter the new value in the highlighted text box.

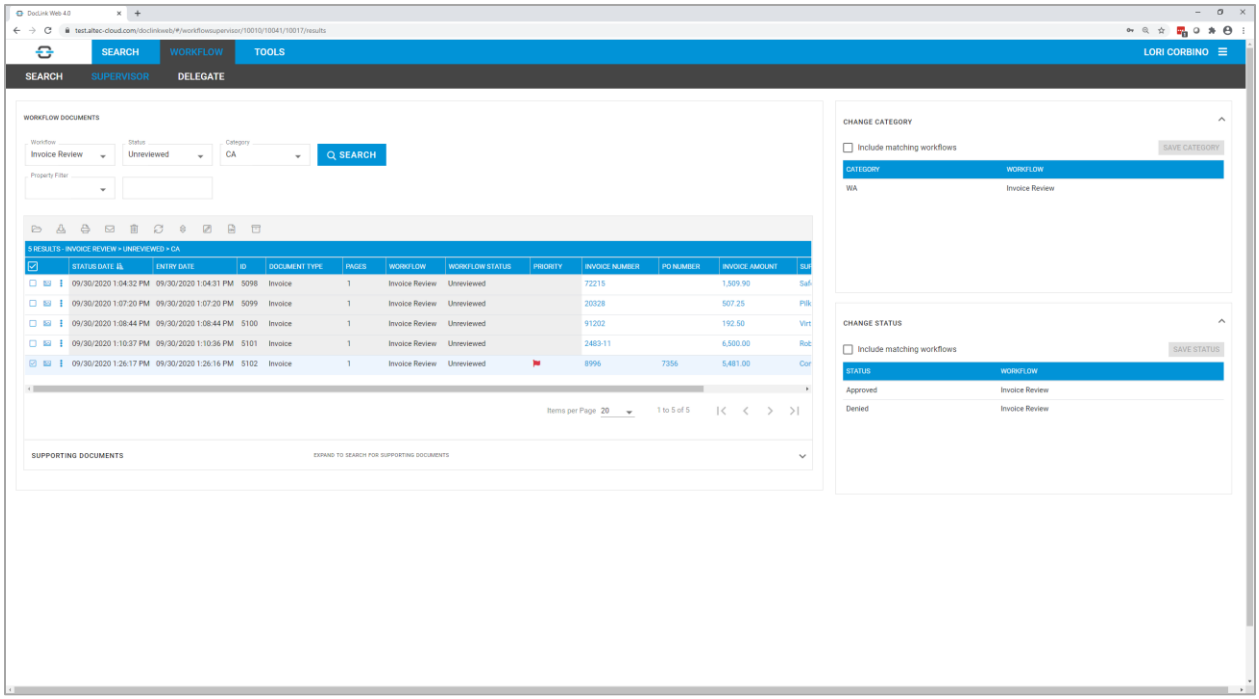


Workflow in web client

Supervising workflows

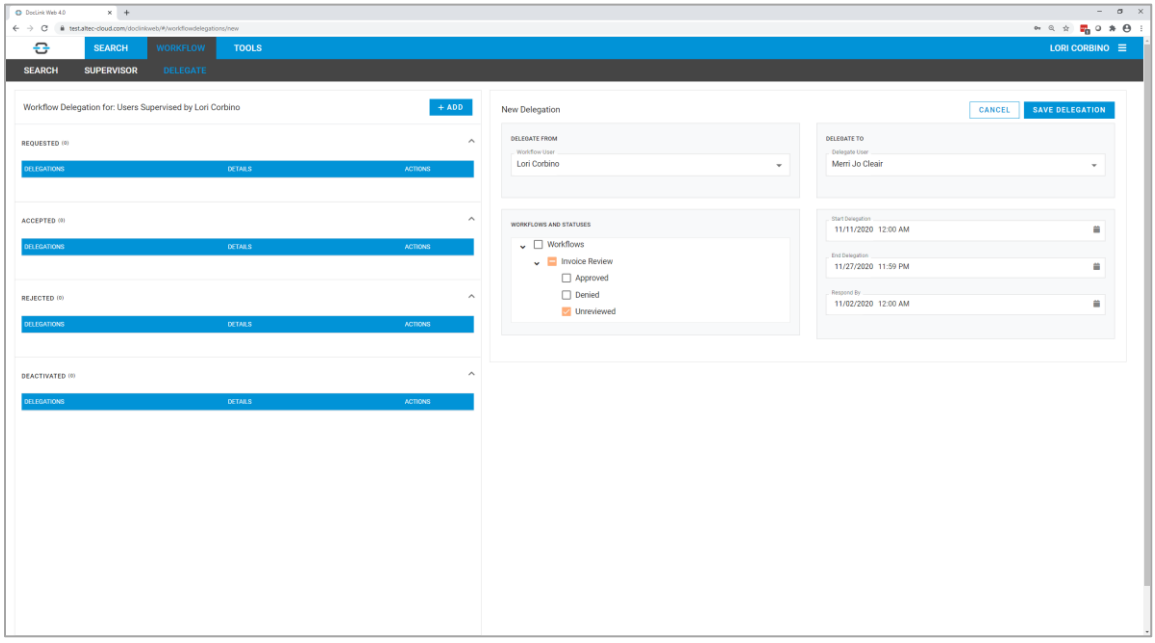
Workflow Supervisor capabilities are now available in DocLink Web, including the ability to filter the list by workflow, workflow status and category.

You can now view both the date and time that the document entered DocLink and the date and time that the document entered the current workflow status.



Requesting and approving workflow delegations

Users have access to all workflow delegation functions from the web client.



Other web client enhancements

Rubber Stamps

Rubber stamp functionality is now available in DocLink Web. Users can permanently stamp TIF documents from the web client's viewer. Note that this functionality is not available when accessing DocLink Web from a mobile device.

Sticky Notes

Sticky notes are also available in DocLink Web. Users can create, edit and view sticky notes from the web client's viewer. Note that this functionality is not available when accessing DocLink Web from a mobile device.

Lookups in advanced search

Lookups are now available during advanced search. If a property is configured with a lookup, the user will be able to use that lookup during search.

Integrating with your ERP

Integration Enabler functionality is now available from the web client. If you are using a DocLink integration with an ERP running in a web browser*, you can now integrate using DocLink Web. Once a DocLink user is configured to utilize an integration, the integration band will be displayed at the top of the web page. The color of the band is green when enabled and red when disabled.

*Integration enabler functionality in DocLink Web currently requires an integration built utilizing Altec's Web-link architecture. Please contact Altec if you have any questions regarding your use of Integration Enabler in the DocLink web client.

Emailing documents

Users can now specify if a document is emailed as a PDF or TIF from the web client.

Filtering in a Smart Form lookup dialog

The filtering capability has been modified for greater visibility and ease of use. The user can select which column to filter, how to filter (begins with or contains) and the filter text. Use of wildcards is not supported.

Exporting search results

Search results values in the web client can be exported to a CSV file with the following options:

- Include entire search results set
- Include only currently selected items
- Include all values (including multi-value properties not displayed in the grid)
    - Include all values using one row per property group

    - Include all values using as few rows as possible
- Include only the values shown in results
- Include column headers

Separator pages

Separator pages can now be printed or downloaded from the web client. The options are accessed from the Tools tab.

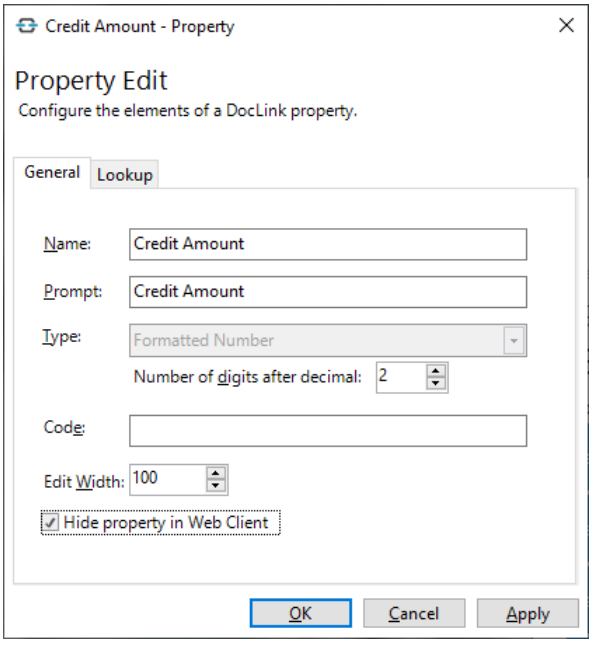
System-wide defaults for web client

The DocLink administrator can now configure user settings in the web client and promote those settings to all DocLink users – making it even easier for users to get started with DocLink Web. Once logged in, the user can modify their individual settings.

Hidden properties in web client

If you utilize integration capabilities or Smart Forms, you may have lots of extra properties. And some of those properties may not provide value when you're searching (and may even get in the way).

Your DocLink administrator can now configure those properties as 'hidden.' Hidden properties are not displayed in the web client's Advanced Search page or Search Results grid.

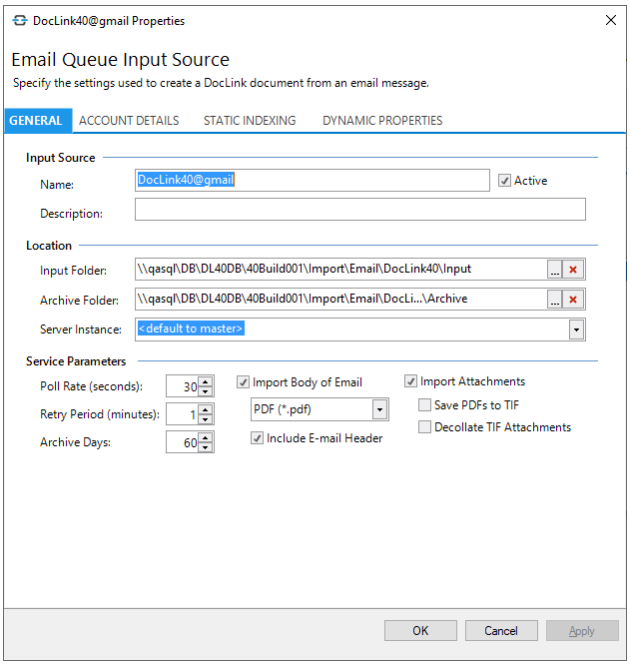


Import Manager enhancement

In previous releases, Import Manager could import the body of the email, but the email header information was not included. You now have the option to include the email header as well.

In addition, the email can be imported in a variety of formats:

- PDF (*.pdf)
- MIME Email (*.eml)
- Web Archive (*.mht)
- HTML (*.html)
- TIFF Image (*.tif)



Workflow enhancement

In previous releases, an approved or denied note could be required before sending a document to a specified workflow status. A third option has been added to require an info note before sending a document to the specific workflow status.

Smart Form enhancement

Document creation smart forms can now use XPS (in addition to EMF) when generating documents that utilize XSLT templates.

DocLink SDK enhancements

Two enhancements have been added to the DocLink SDK:

- A REST Integration API is now part of the DocLink SDK. This web API allows you to create, retrieve and delete entries for transfer of data to and from DocLink – and it's available for DocLink on-

premise and DocLink Cloud users. You can also add documents to the DocLink repository and retrieve documents by DocID.

- The DocLink web client now supports the use of URI syntax to retrieve and launch DocLink documents.

Data Gateway

The new data gateway allows DocLink Cloud tenants to integrate with Altec's pre-packaged integrations for on-premise ERPs. That means you can run DocLink in Altec's multi-tenant cloud and still use the integration with your on-premise ERP.

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