

# DocMoto

Instructions on Apple Calendar integration:

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# Introduction

This document is an introduction to administrators of the DocMoto system in terms of:

- 1. How to configure and adjust the system.
- 2. How the calendaring system works with DocMoto.

# **Configuring the DocMoto system:**

The DocMoto Apple Calendaring integration consists of three components:

- 1. Pre-upload xml schema for Apple Calendar events.
  - a. The pre-upload xml schema for Apple Calendar events require no configuration.
- 2. Apple Calendar script extension.
  - a. The Apple Calendar extension needs to be configured for all DocMoto users who need the calendaring feature.
- 3. Apple Calendar meta-data (or tags).
  - a. The Apple Calendar meta-data (or tags) can be adjusted to suit the businesses requirements.

Click here to download components.

## **Importing Apple Calendar Components:**

- 1. Download and unzip the components.
- 2. Select the **"Show Admin Folders"** from the **"Admin"** menu. A hidden folder **"DocMotoConfig"** will become available.
- 3. Expand the "DocMotoConfig" folder and create a folder named "Scripts" if it does not already exist.
- 4. Add the components unzipped in step 1 by either:
  - a. Select the **"Add Existing File(s)"** option from the **"File"** menu. Navigate to the components and select to import
  - b. Select the **"Add Existing File(s)"** option by right mouse clicking on the **"Scripts"** folder (created in step 3). Navigate to the components and select to import.
  - c. The "Add" button on the toolbar. Navigate to the components and select to import.
  - d. Drag and drop the components from the file system into the "Scripts" folder. Refer to Fig. Apple Calendar Components imported.
- 5. Log out of the system and subsequently log in for the changes to take effect.

### Fig. Apple Calendar Components – imported:

•••											Scripts						
$\langle \rangle$	localhost	0	*	e de la companya de l	⊉	$\odot$	Ð	1	S	ළු	Þ	Ø	C	0		Q Search	
Back	lee		New Folde	r Check-In	Check-Out	Quick Look	Add	Create	Versions	Views	Shares	Update Tag	s Refres	h Attach		Search	
										Scri	ipts						+
DocMoto			100	Name						~ Versio	n Size Ch	ecked In On		Created By	Comment		
Conte	nts			🕨 🚞 Exa	mples						26	September	2016 16:00	) administrator			
				ical	l.preupload.	dmscript.xm	1			2.15 K	CB 26	September	2016 16:00	administrator			
mr Home	(a)		- L	iCa	l.sh					4.05	KB 26	September	2016 16:00	administrator			
Trash				ical	2.preupload	d.dmscript.xr	nl			2.31 K	(B 26	September	2016 16:00	administrator			
DocM	otoConfig			ocr	_abbyy_fine	reader.preup	load.dms	cript.xml		1.39 K	(В 3)	August 2017	12:24	lee			
DOCIVI	otocomig			ocr	_abbyy_fine	reader.sh				953 B	ytes 4	August 2017	11:12	lee			
Favourites																	

(a) Apple Calendar Components.

## Adjusting the Apple Calendar script extension:

- 1. Select the **"Show Admin Folders"** option from the **"Admin"** menu. A hidden folder called **"DocMotoConfig"** will become available.
- Within the "DocMotoConfig" folder, navigate to the "Scripts" folder. Double-click on the file "iCal.sh" file and select the "Open to Edit" option. As shown below in Fig. Opening the iCal script – in edit mode. Note: In this example we will be using Xcode as our editor.

#### **Fig. Opening the iCal script – in edit mode:**



3. The file "**iCal.sh**" is presented to the administrator in an edit mode. Insert the names and email addresses of the users in the same format as the example within the file. As shown in **Fig. Editing the iCal script**.

#### Fig. Editing the iCal script:

● ● ●       iCal.sh	
🗄 < > 🗋 iCal.sh > No Selection	2 D Search
1 #1/bin/sh 2 function get email()	urites Shares Refresh Search
	n On Created By Comment ~
4 if [[ "\$1" == "Lee" ]] ; then	mber 2016 16:00 administrator
5 echo "lee.ferris@chlsoftware.com"	mber 2016 16:00 administrator
0 0X1L 7 fi:	amber 2016 16:00 lee
8	mber 2016 16:00 administrator
9 if [[ "\$1" == "Neil" ]]; then	2017 12:24 Jee
10 echo "neil@email.addr"	2017 11:12 lee
11 BXIT 12 ff.	
13	
14 if [[ "\$1" == "Bob" ]] ; then	
15 echo "bob@email.addr"	
18	
19 echo ""	
20 exit	
21 }	
23 # end of functions	

**Note:** The user name inserted must match an equivalent name held within Apple Contacts, specifically the user must have the **"My Card"** entry. In this example, the user **"Lee"** must exist within Apple Calendar and be marked with **"My Card"**. As shown below in **Fig. My Card**.

## Fig. My Card:

All Contacts	Q Search		Lee Ferris	
iCloud	My Card		CHL Software	
All iCloud	Lee Ferris			
Work Contacts	A	phone	+44 (0) 1242 225233 (Found in Mail)	(i)
Exchange				
All Exchange				
Contacts		home		
blocklist		work	lee.ferris@chlsoftware.com	
Skype Contacts		email		i
WindowsLive Co			(Found in Mail)	
Google	В	email	(Found in Mail)	(1)
All Google				
		note		
Directories				
Exchange Global		+		Edit

 Once the file "iCal.sh" has been amended, saved (within the native application – Text Edit, Xcode, Komodo, Text Wrangler, etc) and subsequently closed – select the file "iCal.sh" (within DocMoto) and select the "Check-In" option.

At this stage the administrator has configured the Apple Calendar script extension.

## Adjusting the Apple Calendar meta-data (tags):

As mentioned the Apple Calendar meta-data (tags) can be adjusted to suit the company's requirements. In this section, we will look at an example of making adjustments.

- 1. Select "Tag Manager" from the "Admin" menu.
- 2. Navigate to the **"Calendar Events"** group (left-hand side of the UI). Expand the group to expose all sub groups and tags. Expand the sub group **"First Review"** and select the **"First Review Alarm(s)"** tag.
- 3. With the **"First Review Alarm(s)"** tag selected, select **"+"** to add a new alarm. Valid entries can include either an email alert or a message alert.
- 4. A dialog is presented allowing an alarm to be inserted. Insert the new alarm and select **"OK"** to confirm. See **Fig. Adding new calendar alarm**.
- Once all the amendments have been finished select "Close" (bottom right hand corner of the "Tag Manager" UI). The administrator will be prompted to save the changes – confirm.

## Fig. Add new calendar alarm:

			Contents			
$\langle \rangle$	localhost 🗘 🖈 🖄		) A @			Q Search
DocMoto	Show Protected Tags :			Тад		+
Conte	Croups and Tags	N	me : First Review Alarm(s)			
🟠 Home	Test Tag Order					
Trash	► Picklists	т	ype : text list		\$	
	Approval Status					
Favourites	Attorney	Default V	alue : Select a notification			
Aardv	Background Colour					
Active	Calendar Events	Value	Default	Selecta Icon File		
Active	<ul> <li>iCal Calendar</li> <li>iCal</li> </ul>	Select a notific	ation 🗸	✓		
Deter	▼ Ø First Review	email 1 day		✓		
Batma	First Review Alarm(s)	email 3 days		v v		
🔤 ENER	First Review All Day	email 30 days		<ul> <li>✓</li> </ul>		
Image	First Review Attendee(s)	email 60 days		<ul> <li>Image: A start of the start of</li></ul>		
Last V	First Review Date	message 1 day		<ul> <li>Image: A start of the start of</li></ul>		
Logal	First Review End Time					
Lega	First Review Notes		Add Picklis	Value		
Projec	First Review Start Time	Enter	New Value - message 3 day	2		
Recent Docu	First Review Type	Lindi	nessage o day	,		
🛛 Letter	► Ø Second Review			Cancel	DK	
	Final Review				_	
	► ♥ Client					
M Aardv	Default Email To					
Photo	Document Type					
🔰 Benef	Email Subject     Email Email					
DocM	Email Text     A					
	File ID	A dela	Disblick Volume			
	Foreground Colour	+ - Add o	r remove Picklist values			
	Guardian ad Litem	Advanced				Delete Tag
	Import Answer					
	Add Tag Add Group					Close ?

Note: The groups and tags can be adjusted in terms of:

- 1. **Number of groups**. In the **Fig. Add new calendar alarm** (above) there are three sub groups: **(a)** First Review **(b)** Second Review **(c)** Final Review. This enables users to register three different epochs.
- Name of the groups. In the Fig. Add new calendar alarm (above) there are three sub groups (a) First Review (b) Second Review (c) Final Review. These can be renamed to terminology that matches the businesses requirements, such as: (a) First Task (b) Second Task (c) Final Task etc.
- 3. Tag Values. As illustrated in the above example, administrators can adjust or add new values for tags.

# How the calendaring system works:

The administrator of the DocMoto system can apply rules in the form of document tags against any folder within the DocMoto system (including folders within folder templates). This will enable users to fill in **"Calendar Task"** tags and subsequently make an entry in to an Apple Calendar on confirmation. It is possible to create (or adjust) a folder template to encapsulate the calendar rules.

## **Setting Calendar Tags:**

This example illustrates setting calendar tags against an existing folder within DocMoto. As stated; this methodology is also available within the **Folder Templates** – useful for automating.

- 1. Select the folder to set calendar tags against.
- 2. Select "Edit Folder Properties" from either:
  - a. The **File** menu.
  - b. The right mouse click menu.
  - c. The short cut **cmd + shift + e**.
- 3. Select the **Document Tags** tab.
- 4. Select the "+" button (bottom left hand corner of UI) to add tags. A **Tags Requested on Check-In...**" dialog will appear.
- 5. Navigate to the group **Calendar Events** and expand.
- 6. Select the tags to add and select **"OK"** to confirm.
- Once the tags have been added the user can drag and drop the tags in order preference. Select "Required" check box to make the tags mandatory. See Fig. Added Calendar Tags to Contract Folder.

### Fig. Added Calendar Tags to Contract Folder:

	Contents	
< > localhost 🗘 👘		Search
Back lee New Folde	er Check-In Check-Out Quick Look Add Create Versions Views Shares Update Tags Refresh Attach	Search
		+
DocMoto	Folder Name: Contracts (a)	
Contents	Folder Tags Folder Columns Document Tags (b)	
Home	Set any tags that you wish users to complete when adding files to this folder. Tags will be optional unless you mark them as required	
Trash	(Req'd).	
Favourites	Included Tags Required	
Aardvark vs Baldrick	iCal Calendar	
Active Clients	First Review Date	
Active Projects	First Review Attendee(s)	
Batman vs The Joker	First Review Alarm(s)	
ENERGY STAR.pdf	First Review All Day	
Images	First Review Start Time	
Last Will And Testaments	First Review End Time	
Legal	First Review Title	
Projects	First Review Type	
Recent Documents	First Review Notes	
Letter.docx		
Letter.docx		
Aardvark vs B Invoice.docx		
Photo copy 2.jpg		
Benefits Of At System.pages		
DocMoto TrainPlan.doc.docx	Note: Tags can be created by Administrators using Tag Manager.	
	Cancel OK ?	
6		
0	(a)	0
·	1 selected	

- (a) Contracts folder within DocMoto where the calendar tags will be registered.
- (b) **Document Tags** tab for adding (or removing) tags.
- (c) Included Tags tags registered to Contracts folder.
- (d) Required check box to make tag(s) mandatory.

8. Select "OK" to confirm.

A user can now import existing file(s) (i.e. one created outside of the DocMoto system) or create a file in the folder **"Contracts"** and they will be prompted to fill in the requisite criteria. See **Fig. User Updating Calendar Tags**.

r			
•••		Contracts	
< > localhost ᅌ 🐔			Q Search
Back lee New Fold	der Check-In Check-Out Quick Look Add Create V	rersions Views Shares Update Tags Refresh Attach	Search
Check	king in the following		+
DocMoto	ido Contract docx		ed By
Contents			
Home Comp	lete any tags as necessary		
V Trash		Value	
Favourites Cor	mment		
Aardvark vs Baldrick			
Active Clients			
Active Projects	Calendar	dermate D	
David Davidson	t Poview Date		
ENERGY STAR.pdf Fils	t Review Date	2018-07-19	
Last Will And Testaments	t Review Altendee(s)		
		email 1 day	
Projects	t Poview Start Time	raise	- (a)
Personal Per		10:00	(4)
Recent Documents	t Review End Time		
Last will And restament doc Firs	t Review Trice	Contract Renewal	
Davidson v. Sm., - Invoice do	t Review Type	Event 🔍 🗸	
Letter.docx	a Review Notes	For demo purposes only	
Letter.docx			
Aardvark vs B Invoice.doc	-		
Photo copy 2.jpg		Cancel OK 2	
Benefits Of At System.page			
DocMoto TrainPlan.doc.docx			
6	) 🕤 🗠 🗸 🛶 🖳 Root 🕽 🔤 Contents 🔪 🧰 Cont	racts	
			<b>a</b>

#### Fig. User Updating Calendar Tags:

(a) Calendar Tags – populate with values by the end user.

The user has entered values for all the necessary fields, but this example deals with only one attendee (i.e. the user "Lee"). For multiple attendees the user will need to comma separate each user OR enable the tag "First Review Attendees" to have multiple occurrences, thus giving the end user the ability to add the tag again with another attendee.

Once the user has selected **"OK"** to confirm the import or creation of a file in the folder **"Contracts"**, the DocMoto system will:

- 1. Import or create the file and add an entry to the users' Apple Calendar.
- 2. The attendee(s) added will be notified via the mechanism selected (i.e. email or message) at the appropriate moment.
- 3. An "x-docmoto" link will be inserted into:
  - a. The Apple Calendar item created.
  - b. The email message notification (only if selected as the mechanism for notification).

### **Additional Notes:**

The DocMoto system is currently setup to update individual Apple Calendars. If you would like to use a shared Apple Calendar this needs to be configured with Apple Calendars. The calendaring within DocMoto only works for the import of an existing file or the creation of a new file (using DocMoto's create from master feature). The integration between DocMoto and Apple Calendars is a one-way process (i.e. if entries are deleted from a user's calendar, the calendar will not update DocMoto).

## The Results:

### Fig. File Imported into DocMoto – Calendar Tags Set:



(a) Column Headers – configured to reflect:

• **Name** – Name of the document.

.

- First Review Date When is the first review date? Fully sortable ascending & descending.
- First Review Title Title of the review to be undertaken.
- Checked In On When was the document checked-in? Fully sortable ascending & descending.
- **Created By** Who was the document created by?
- Comment Any associated comments.

(b) Calendar Events - Groups & tags with values set.

### Fig. Calendar Updated By DocMoto:



(a) First Review Title – Example DocMoto Apple Calendar Integration.

(b) First Review Date & First Review Alarm – 2<sup>nd</sup> April 2018 & email alert.

(c) First Review Attendee(s) – Lee in this example.

(d) First Review Notes – For demo purposes only. Note: An x-docmoto link has been inserted into the calendar and when selected will automatically open DocMoto (if it's not already) and auto navigate the user to the item in question.

### **Email Notification:**

Chl software invited you to "Contract Renewal". — Inbox     The second se	
chi software @ Chi software O Inbox - Chisoftware 10:14 Chisoftware 10:14 Chisoftware Inbox - Chisoftware 10:14 Chisoftware 20, 20, 20, 20, 20, 20, 20, 20, 20, 20,	Invitation Contract Renewal Thu 19 Jul at 10:00 am to 11:00 am
19	Decline Accepted
chl software invited you to "Contract Renewal".	
(b) when Thursday, July 19, 2018, 10:00 AM BST - 11:00 AM BST	
(d) URL x-docmoto://localhost/Contents/Contracts/Pseudo%20Contract.docx (c)	
Accept Secline Maybe	
Don't recognize this sender? <u>Report Junk.</u>	
Copyright © 2018 Apple Distribution International, Hollyhill Industrial Estate, Hollyhill, Cork, Ireland All rights reserved.	
021426.ics	

(a) First Review Title – Contract Renewal.

(b) First Review Date – Thursday, July 19<sup>th</sup>, 2018, 10:00 AM BST – 11:00 AM BST.

CHL Software www.docmoto.com (c) First Review Attendee(s) – Me.

(d) x-docmoto link (stated as URL) to document.

(e) First Review Notes – For demo purposes only.

(f) Calendar update – This would only be used if the business had separate calendars (i.e. not shared).