



## Instructions on DocMoto & MS Outlook integration

### 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.

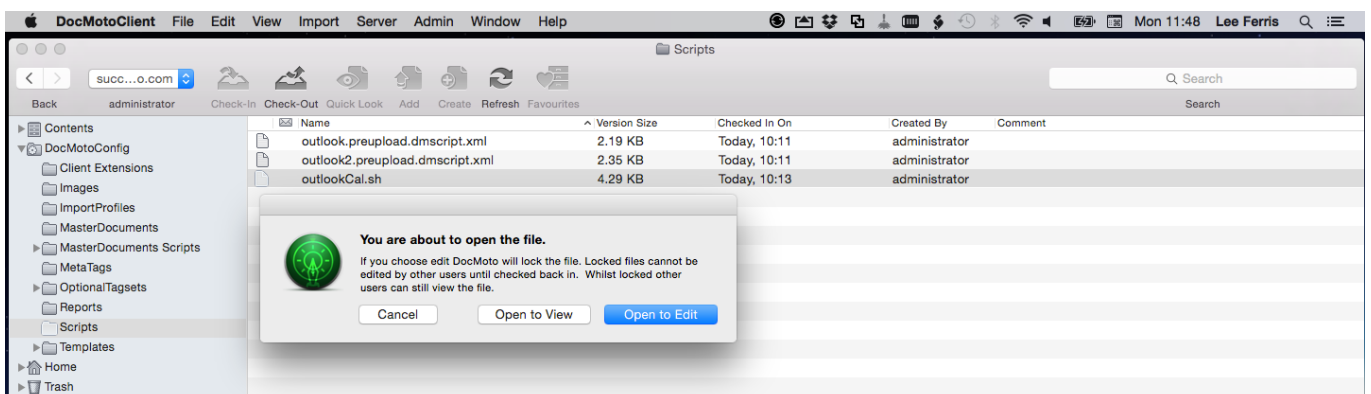
### Part 1: Configuring the DocMoto system.

The DocMoto support team have uploaded the MS Outlook extensions into your DocMoto system. These components consist of:

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

### Adjusting the MS Outlook script extension:

1. Select the “**Show Admin Folders**” option from the “**Admin**” menu. A hidden folder called “**DocMotoConfig**” will become available.
2. Within the “**DocMotoConfig**” folder, navigate to the “**Scripts**” folder. Double-click on the file “**outlookCal.sh**” file and select the “**Open to Edit**” option. As shown below. **Note:** In this example we will be using the editor Komodo edit.



3. The file “**outlookCal.sh**” will be 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 below in **Fig: 3a**.

**Fig 3a.**

```

1 #!/bin/sh
2 function get_email()
3 {
4     if [[ "$1" == "Dan Wieder" ]]; then
5         echo "Dan.Wieder@successacademies.org"
6     fi;
7
8
9     if [[ "$1" == "Bob" ]]; then
10        echo "Bob@anon.com"
11    fi;
12
13    echo ""
14    exit
15 }
16
17 # end of functions...
18
19

```

**Note:** The user name inserted must match an equivalent name held within MS Outlook – Contacts. In this example the user “**Dan Wieder**” must exist within MS Outlook – Contacts as stated.

4. Once the file “**outlookCal.sh**” has been amended, saved (within the native application – Text Edit, Komodo, etc) and subsequently closed – select the file “**outlookCal.sh**” (within DocMoto) and select the “**Check-In**” option.

At this stage the administrator has configured the MS Outlook script extension.

**Adjusting the MS Outlook meta-data (tags):**

As mentioned the MS Outlook meta-data can be adjusted to suit the companies requirements. In this section we will look at a couple of examples.

1. Select the “**Tag Manager**” option from the “**Admin**” menu.
2. Navigate to the “**Calendar Tasks**” group (left-hand side of the UI). Expand the group to expose all sub-groups and tags. Expand the sub-group “**First Task**” and select the “**First Task Attendee(s)**” tag.
3. With the “**First Task Attendee(s)**” tag selected, select the “**+**” button to add more attendees.
4. A dialog will be presented to the administrator allowing them to insert the name of the individual. Insert the name and select the “**OK**” button to confirm. As shown below in **Fig 4a**. **Note:** The name entered must match an equivalent within MS Outlook – Contacts.
5. Navigate to the “**First Task Alarm(s)**” tag. With the tag selected – select the “**+**” button to add a new alarm. Valid entries can include either an email alert or a message alert.
6. A dialog will be presented to the administrator allowing them to insert a new alarm. Insert the new alarm and select the “**OK**” button to confirm. As shown below in **Fig 6a**.

Once all of the amendments have been finished select the “Close” button (bottom-right hand corner of the “Tag Manager” UI). The administrator will be prompted to save the changes – confirm.

Fig 4a:

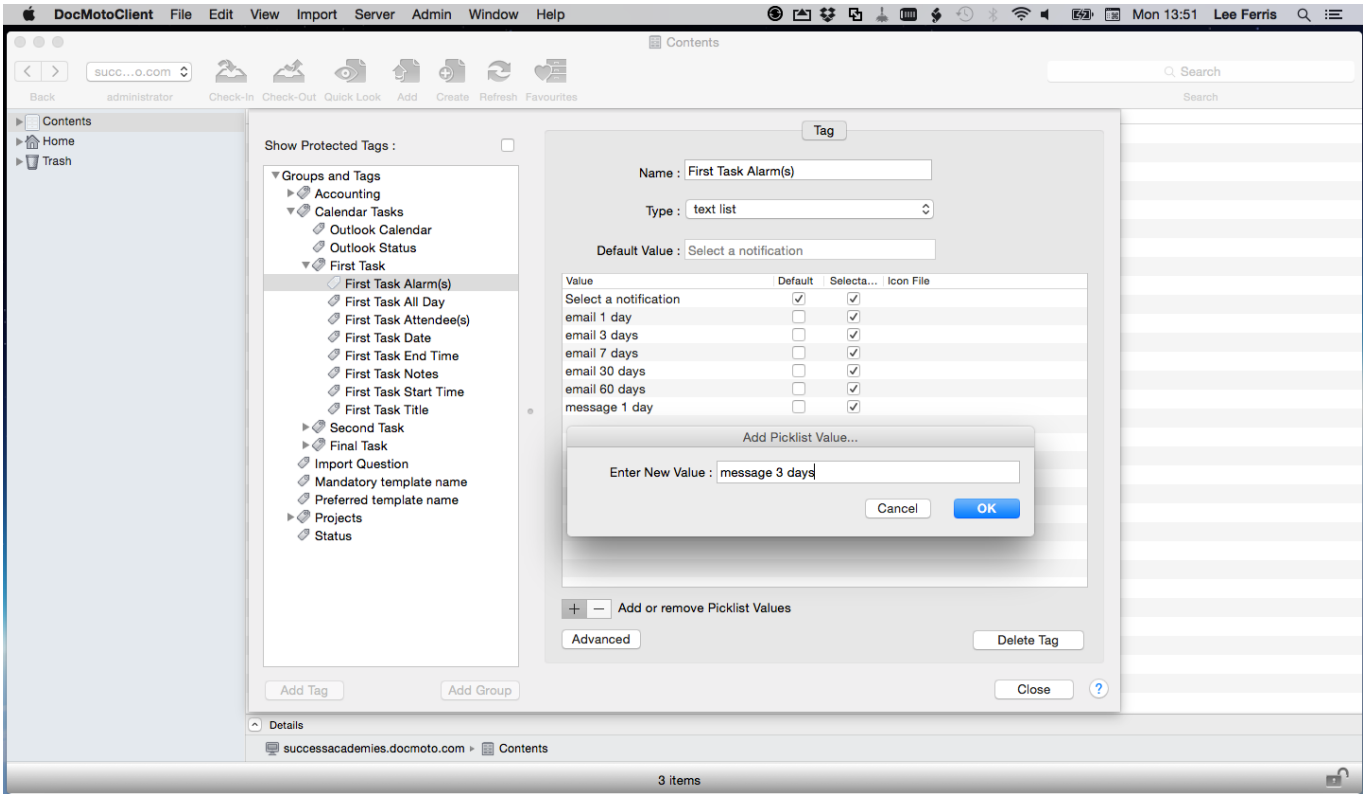
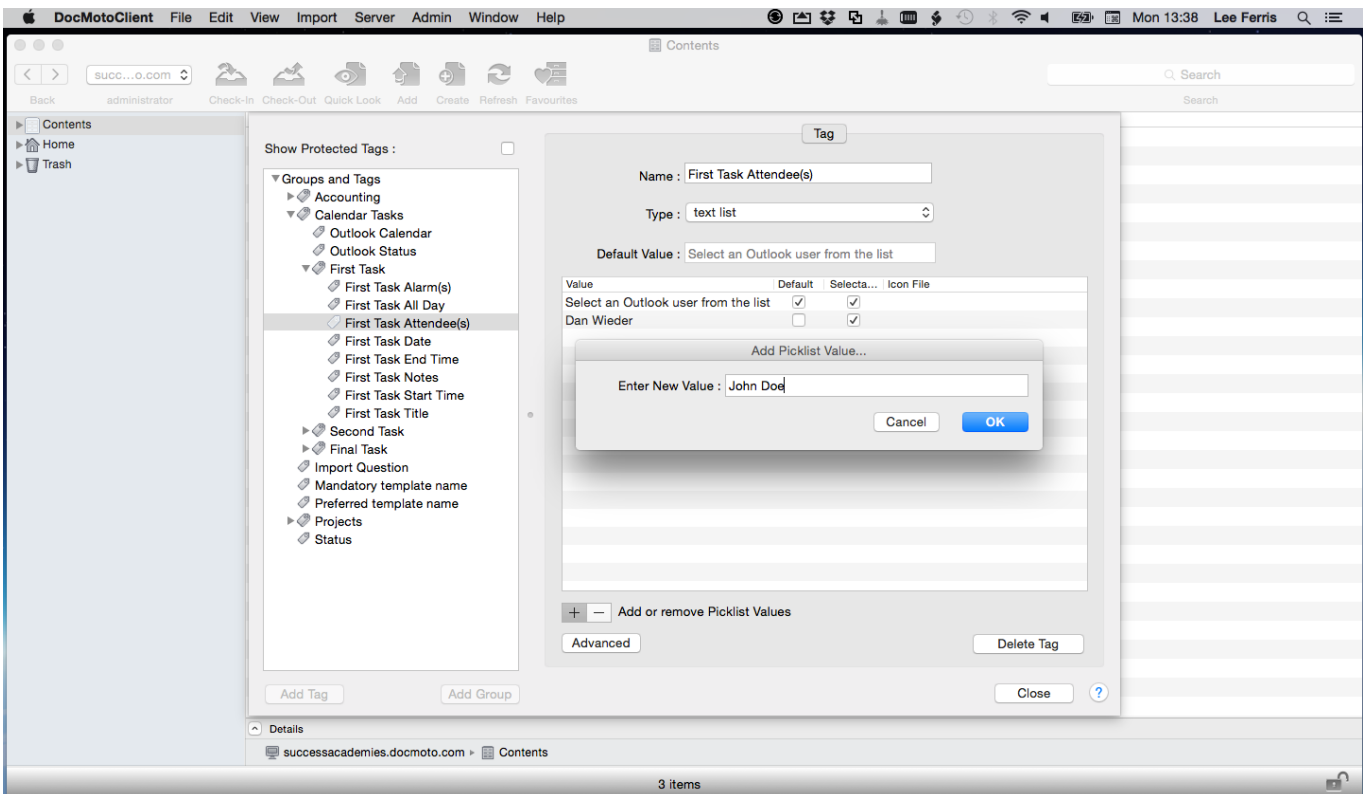


Fig 6a:

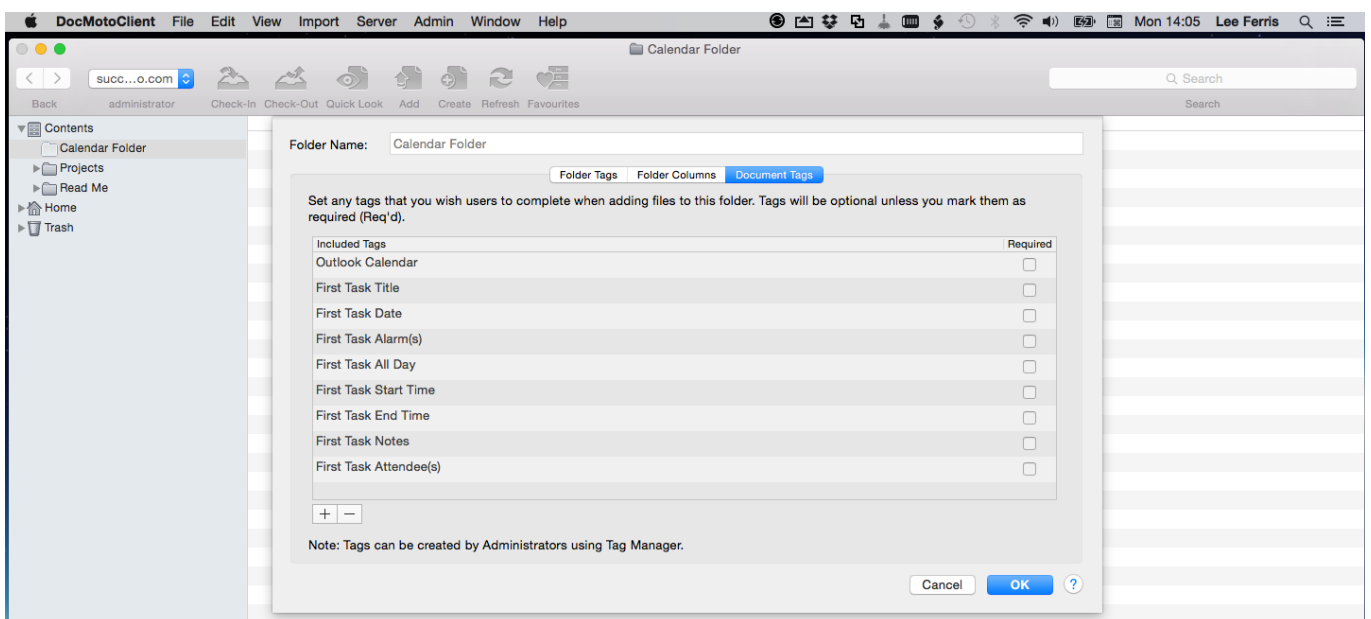


## Part 2: How the calendaring system works:

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

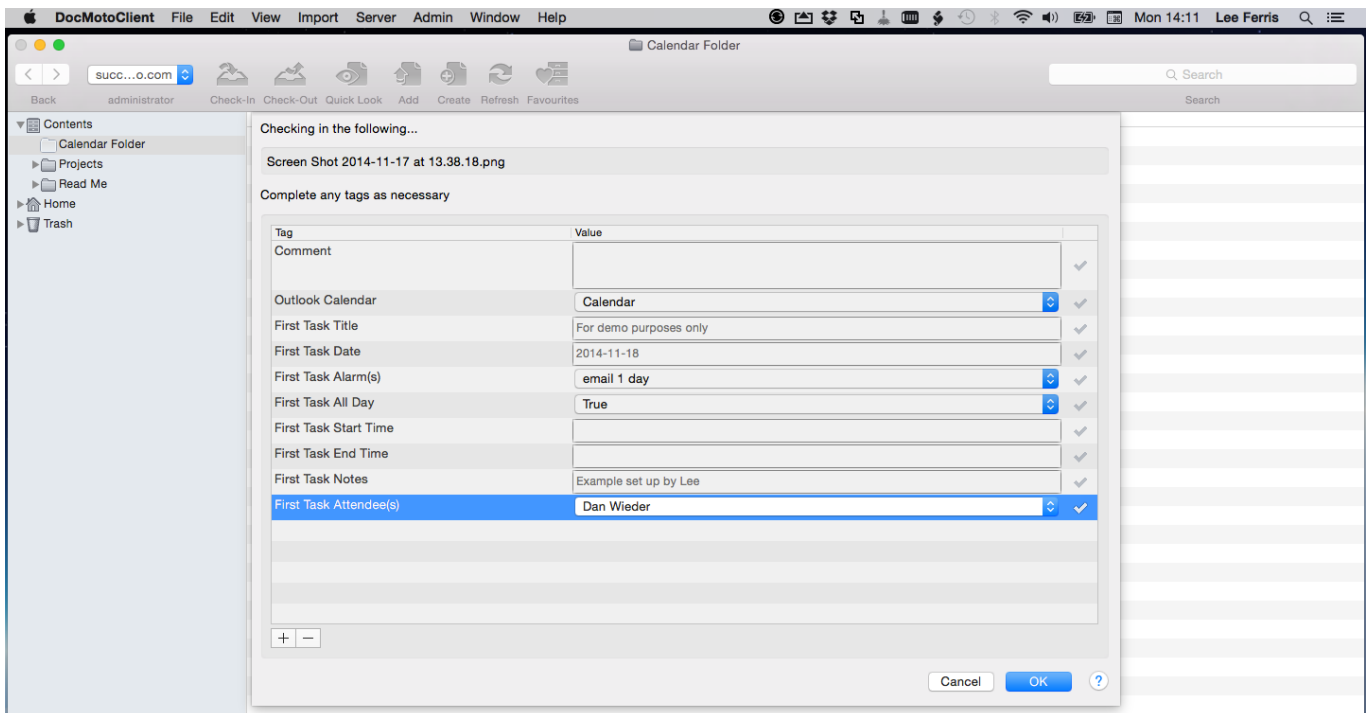
We have created an example folder “**Calendar Folder**” within your DocMoto system with “**Calendar Task**” tags registered to it. As shown below in **Fig. Calendar Folder**.

**Fig. Calendar Folder**



A user can now upload an existing file (i.e. one created outside of DocMoto) or create a file in the folder “**Calendar Folder**” and they will be prompted to fill in the requisite criteria. As shown below in **Fig. User updating calendar tags**.

**Fig. User updating calendar tags.**



The user has entered values for all the necessary fields but this example deals with only one attendee (i.e. the user “**Dan Wieder**”). We have configured your system so that the tag “**First Task Attendee(s)**” has the option of adding multiple instances of the tag. To add more attendees; select the “+” button and navigate to the “**First Task Attendee(s)**” tag, select the tag by selecting the check-box and confirm by selecting the “**OK**” button. The “**First Task Attendee(s)**” tag will be added, allowing the user to select an additional attendee from the list (this step can be repeated as many times as necessary – depending on the number of attendees required).

Once the user has selected the “**OK**” button to confirm the import or creation of a file in the folder “**Calendar Folder**”, the DocMoto system will:

1. Import or create the file and add an entry to the user’s MS Outlook calendar.
2. The attendees added will be notified via the mechanism selected (i.e. email or message) at the appropriate moment.
3. A “**gopher**” link will be inserted into:
  - 3.1. The MS Outlook calendar item created.
  - 3.2. The email message notification (only if selected as the mechanism for notification). **Note:** Users will need to set their DocMoto Client preferences to enable “**gopher**” links. A video tutorial dealing with “[Using links with Microsoft Word](#)” deals with this area.

#### **Additional Notes:**

The DocMoto system is currently setup to update individual MS Outlook calendars. If you would like to use a shared MS Outlook calendar this needs to be configured

within MS Outlook and can only be done if the company is using MS Exchange. 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 MS Outlook calendars is a one way process (i.e. if entries are deleted from a user's calendar, the calendar will not update DocMoto).