

American Data Group Inc. DocManager Setup Guide Fund Management System

**** DocManager is ONLY available to Progress windows clients. Linux Terminal Emulator clients may not use DocManager. ****

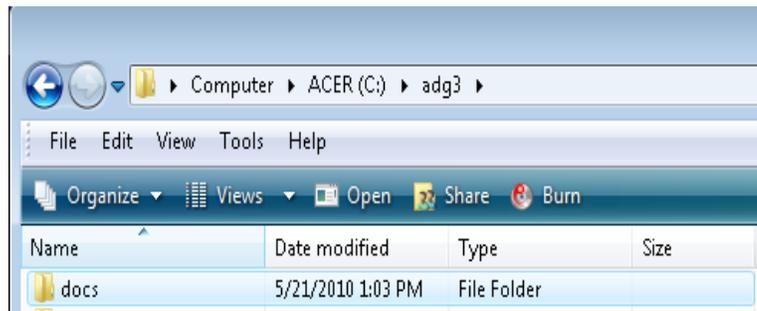
The following items describe the setup of DocManager to make it available for use within the FMS applications. DocManager allows the operator to select a file (docfile) from their system and attach it to a requisition, purchase order, vendor, or employee (source record). The docfile may have any file extension, whereas the Microsoft operating system knows how to auto-open the file. When added to the source record, the docfile may also be given a group classification. The docfile will be copied from the local system to a shared directory on the database server.

Once the docfile has been copied and a record created in DocManager, the docfile may be opened by any user with access to the original source record. There is an exception with employee records. Employee DocManager records may have a security level assigned to it based on the group classification assignment. The employee wishing to open docfile must have the correct access right in their employee master record.

1. Initial Setup

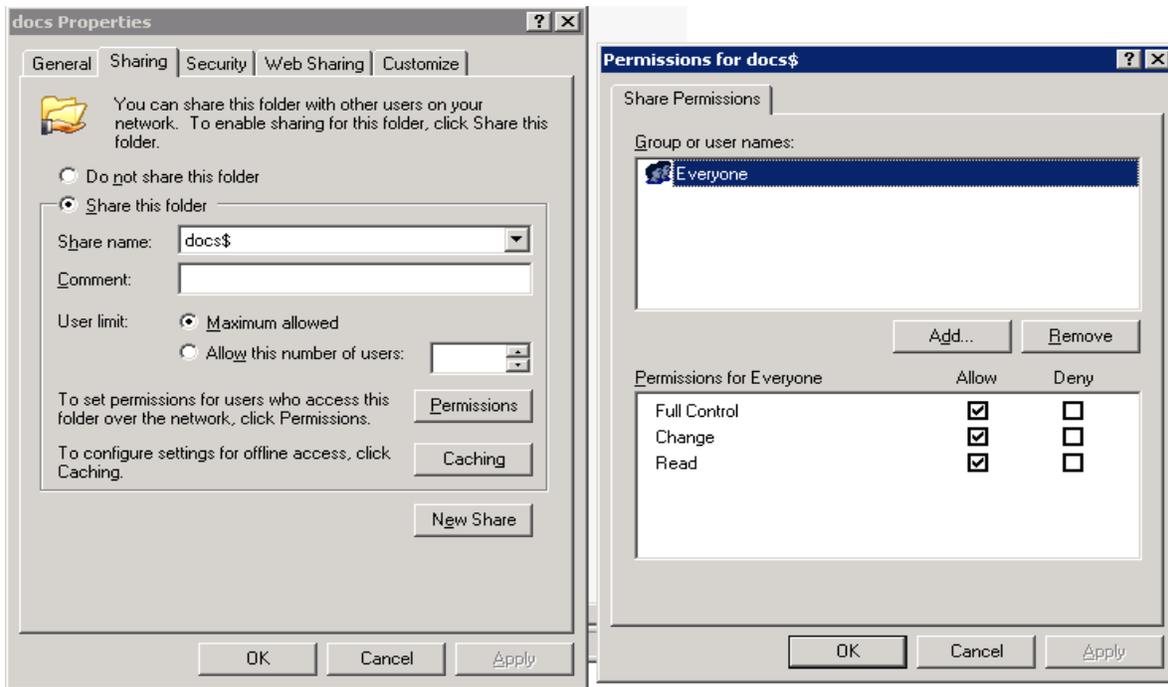
1a. Directory Setup

To setup DocManager, a directory needs to be created on the database server (the same server where the Progress FMS database is located). Once setup, this same directory may be used by ALL DocManager applications. In our example, we created the docs directory in [c:\adg3](#) on the database server. The new directory must be made shareable so other users may read and write to the directory.



Depending on your version of the operating system where the database is located, the share setup may differ. On Microsoft systems, set the docs directory to be shared as **docs\$** (the \$ at the end means the directory is hidden). Security access for the directory should include EVERYONE with Read&Execute, Read, and Write permissions. See sample screen below.

On Linux servers, the directory must be enabled with a samba share. In `/etc/samba/smb.conf` the directory must be identified as writable with valid users of everyone. See man pages for `smb.conf` for setup.

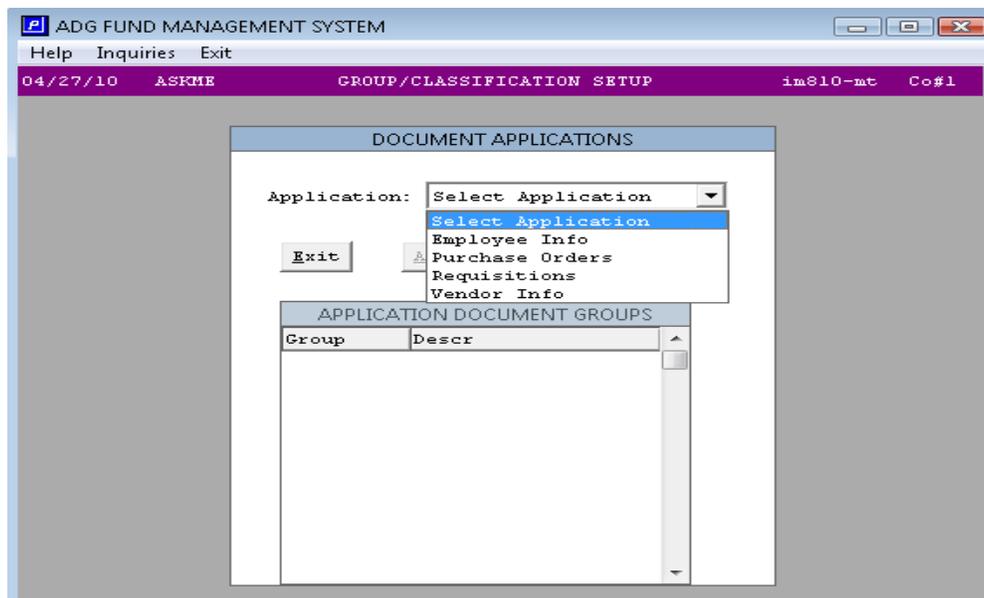


BE SURE THE NEW DIRECTORY IS BEING INCLUDED IN ALL YOUR BACKUPS!

1b. System Administration Setup

Using your normal method of access to the FMS application, log in, and from your main menu select System Administration. If you do not have System Administration access, then someone else who does have access must set up DocManager, or an administrator must assign im810-mt to your login menu.

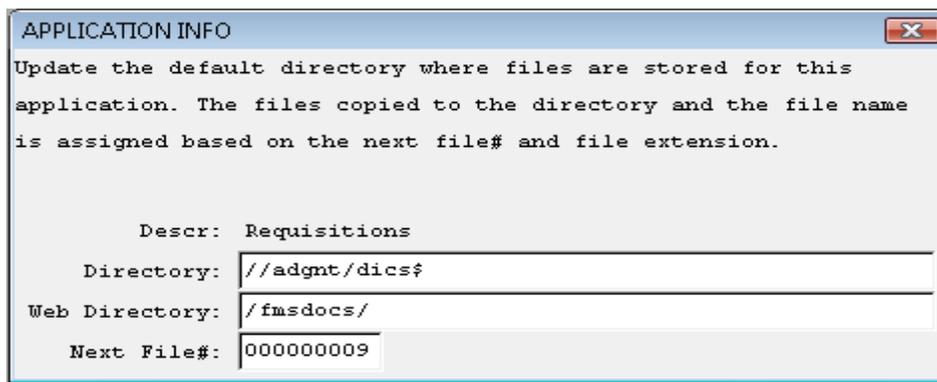
Select “22. DocManager” from the System Administration Menu (or from your custom menu).



Each application for which you intend to use DocManager must be setup. Each application has its own setup and Group Classifications. After setting up one application to test, once it is working, then set up the other applications.

For our example, select “Purchase Orders”. Select the “Update Appl” option and the dialog box, shown below, opens which prompts for the path of the shared directory created in step 1. Enter the full path to find the share. Use your server's DNS name instead of “adgnt”, and use the share name created in step 1 instead of docs\$. Be sure to begin the line with // and end the line with /.

The next file number is set to 1 and is automatically incremented when a new docfile is copied into the directory.



When files are copied into the share directory, they are renamed as X#####.EXT. X will be a value which identifies which application the docfile is for: E=Employees, V=Vendors, R=Requisitions, and P=Purchase Orders. ##### is the file number used as identified in the Next File# field. EXT is the extension of the original file copied (pdf, doc, xls, txt, jpg, ...).

Each application may have its own share directory to copy docfiles to. If you choose to do this, then you need to create additional share directories as done in step 1. The system created docfile names are designed to be unique. There is a limitation in that an application may not have more than 999 million docfiles.

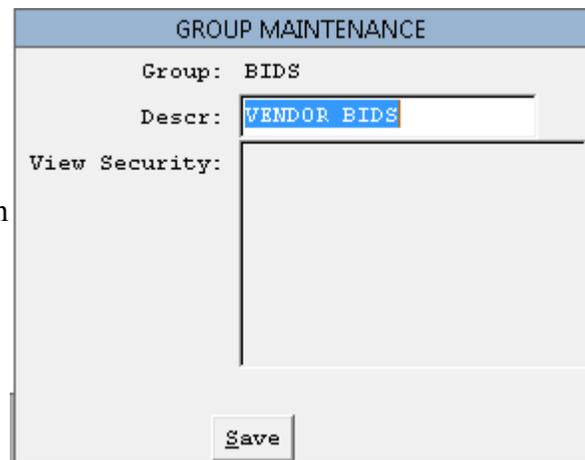
The Web Directory is used by an application's web interface. Currently, only the Requisition supports this feature. The value entered into the Web Directory field must be setup as a Virtual Directory in web server (IIS or Apache) and point to the actual directory where the documents are being save. In the above example, clients save files to the shared directory, where the actual directory on the sever is D:\adg\docs.

1c. Create Application Groups

Each application MUST have at least one group. A group has a code and description. Employee applications also have a Security Level which will be discussed in the Employee Security Levels Section.

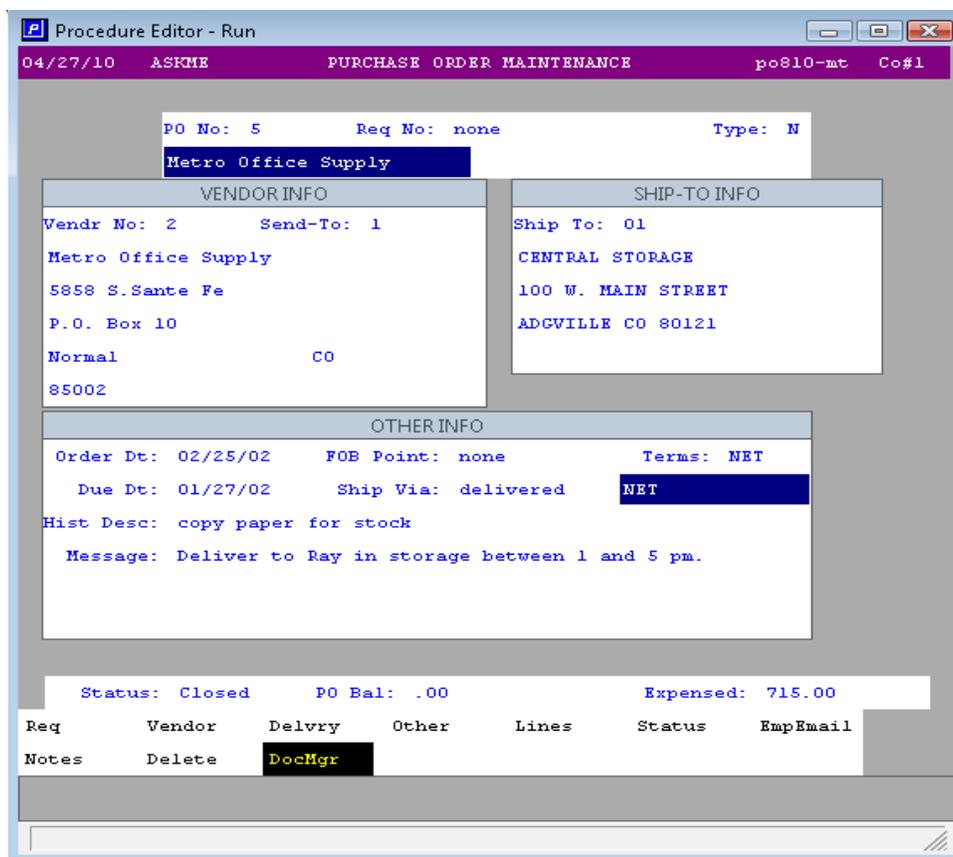
To create a group, select the 'Add Group' button. Enter the Group's Code and a simple description. View Security can only be maintained if the Employee application is selected. Add as many groups as needed. You may always come back and add more groups for an application.

When done, Escape/F4, or select the Exit button to leave DocManager Setup.

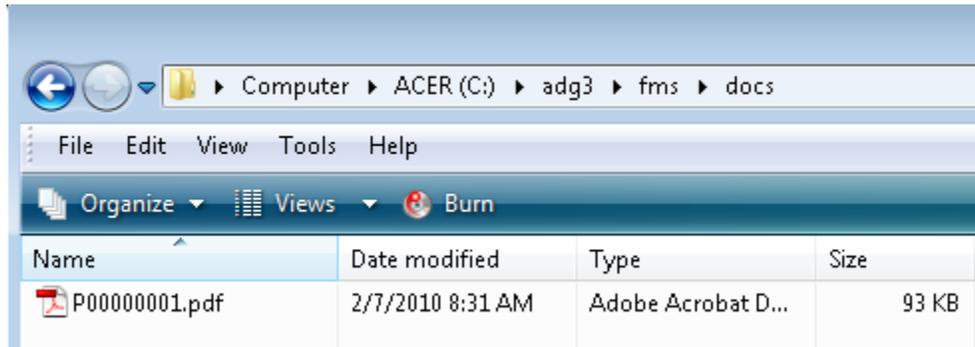


2. Application Testing

Now we want to test that the share directory has all the necessary permissions. Since we selected Purchase Order to test the setup, go to the Purchase Order File Maintenance Menu. Select #1, Purchase Order Maintenance. Enter a valid PO# to use. The PO may be open or closed. At the bottom of the screen select the new menu option DocMgr to open the application.



After adding a DocManager record as described in the next section, if the document does not open, verify that the document exists in the application directory identified. My first PO docfile looks like the below.



3. DocManager Program

The DocMgr menu option will automatically be displayed in the programs associated with the applications which have been setup.

Application	Programs
Purchase Orders	Purchase Order Input (po110-mt), Purchase Order Inquiry (po310-iq), Purchase Order File Maintenance (po810-mt).
Requisitions	Requisition Input (rq810-mt), Requisition Approvals (rq151-se), Purchase Order Inquiry (po310-iq), Requisition Inquiry(rq171-iq)
Vendors	Invoice Entry (ap110-mt), Vendor Inquiry(ap310-iq), Vendor File Maintenance
Employees	Employee/Personnel File Maintenance (pr460-mt), Employee Inquiry (pr301-iq).

When the DocManager program opens, if the calling program is an input or file maintenance program, you will get the 'Add' and 'Delete' buttons; otherwise, they are excluded for inquiry programs.

3a. Adding a Document

To add a document to a source record, select the 'Add' button.

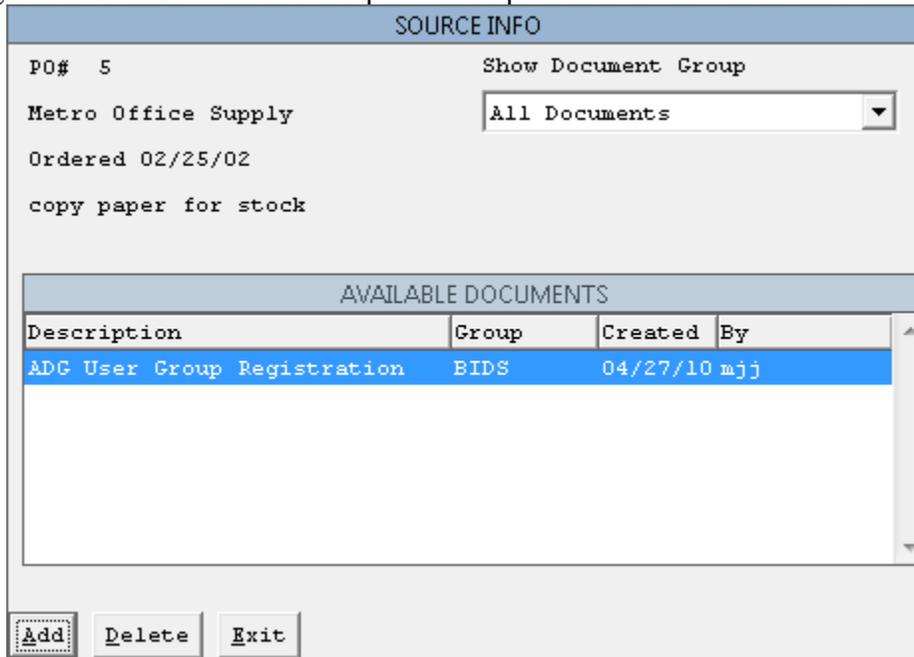
Enter the full path and filename of the file you wish to attach to the source record. You may use the

'Files' button to open an explorer session to help find and select the file. Enter a description of what the file represents, and then select which Group for the application to be assigned. Select 'OK' to save the information or 'Cancel' to leave the function. Upon selecting 'OK' the system will copy the file to the database server as defined in the application setup and give it a new unique filename. A record is created to display the docs available to the source record with the grouping and description.

When the DocManager record is created, it is updated with today's date and the login id of who added the record.

3b. View a Document

To view a file, from the list shown, use your mouse or arrow keys to move up and down the list. You may also change the 'Show Document Group' at the top of the screen to narrow down the search.



The screenshot shows a window titled "SOURCE INFO". It contains the following information:

- PO# 5
- Metro Office Supply
- Ordered 02/25/02
- copy paper for stock

At the top right, there is a "Show Document Group" dropdown menu currently set to "All Documents".

Below this is a section titled "AVAILABLE DOCUMENTS" with a table:

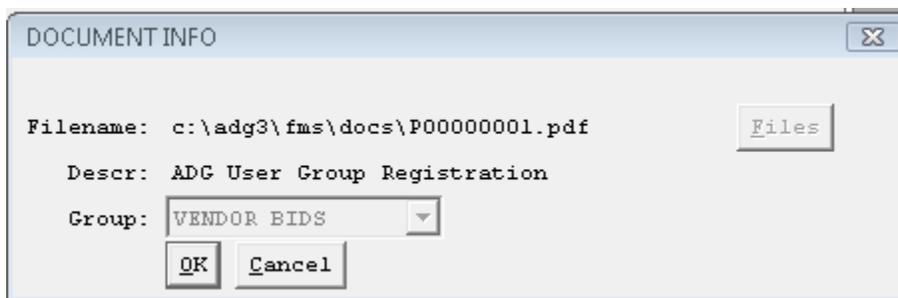
Description	Group	Created	By
ADG User Group Registration	BIDS	04/27/10	mjj

At the bottom of the window are three buttons: "Add", "Delete", and "Exit".

To select the document desired, double-click it or if it is highlighted press <Enter>. Based on the file's extension, the record should be opened in the correct application. If the record does not open, verify the extension is enabled on the client's computer. If this is the first time for an application, verify the file was actually copied to the application's directory on the database server as identified in DocManager Setup.

3c. Delete A Document

To delete a document, just select the 'Delete' button after the desired record is highlighted. Information about the document will be displayed for confirmation. If you are sure you wish to delete the record, select 'OK', and the document record will be deleted along with the associated file in the shared directory.



The screenshot shows a dialog box titled "DOCUMENT INFO" with a close button (X) in the top right corner. It contains the following information:

- Filename: c:\adg3\fms\docs\P00000001.pdf
- Descr: ADG User Group Registration
- Group: VENDOR BIDS

At the bottom are two buttons: "OK" and "Cancel".

Select the 'Cancel' button to discontinue the delete operation.

4. Employee Application Security Levels

An additional security level is available for the Employee Application. If a user has Employee Inquiry Access, DocManager will only display documents that meet the user's security level. The document's security level is actually determined by the group the document was assigned to. If a group's security levels are changed, all documents within the group receive the new security levels.

To set up Employee Application Group Security Levels, go to Codes Master Maintenance which is available in the G/L File Maintenance Menu or Payroll File Maintenance Menu. Once in Codes Master, select 'IS – HR/PR DocManager/Notes Security'.

SYSTEM CODES	
Code	Description
AL	APPL TRACKING LETTERS
AN	APPL TRACKING NOTE CLASS
BT	PURCHASING BID TYPES
EO	EEOC FUNCTIONS
IL	WORK COMP ILLNESS'
IS	PP/HR DOCMANAGER/NOTES SECURITY
IV	A/R INVOICE TYPES
LR	LEAVE REQUESTS
NC	NOTES CLASSIFICATION
PA	PERSONNEL ACTION REQUEST TYPES
PC	PAY PERIOD CODES

First create on paper the codes and description you would like to use for determining security levels.

Each security level created stands alone. One is not dependent on the other. Eventually the codes will be assigned to the group records in the DocManager Setup for Employees. In our example, I setup 5 groups, M-Managers, D-Department Heads, A-Administrator, H-Human Resources, and P for Payroll. Use F6, +, or Insert key to create records. The Security Level Code may not be more than 2 characters.

Exit Codes Master Maintenance and go to System Administration and Select #22 DocManager Setup. Choose the Employee Application from the drop down list. Select the 'Update Appl' button and verify the directory information has been entered. If not see section 1b of this document.

AVAILABLE CODES FOR: IS DOCMANAGER SECURITY (EMPLOYEE)	
Code	Description
A	Administrator
D	Department Head
H	Human Resources
M	Manager
P	Payroll

Next, add your groups. Our example shows 3 groups, each with different types of security: Pictures/ID for everyone, Reviews for Managers, Department Heads, HR, and Administrators, and Disciplinary Actions for HR and Administrator.

Select 'Add Group'. Entered a group code of ID with a description of 'Picture'. The View Security options are created from the Codes Master 'IS' values. I selected 'EVERYONE' to be able to view these documents.

To change a group's information, just double-click or <enter> on the highlighted option.

The screenshot shows a window titled "GROUP MAINTENANCE". It has three input fields: "Group:" with the value "ID", "Descr:" with the value "Picture", and "View Security:" with a dropdown menu. The dropdown menu is open, showing a list of options: "EVERYONE" (highlighted in blue), "A: Administrator", "D: Department Head", "H: Human Resources", "M: Manager", and "P: Payroll". A "Save" button is located at the bottom right of the window.

The screenshot shows a window titled "GROUP MAINTENANCE". It has three input fields: "Group:" with the value "REVIEWS", "Descr:" with the value "ANNUAL REVIEWS", and "View Security:" with a dropdown menu. The dropdown menu is open, showing a list of options: "EVERYONE" (highlighted in blue), "A: Administrator", "D: Department Head", "H: Human Resources", "M: Manager", and "P: Payroll". A "Save" button is located at the bottom right of the window.

For Reviews, we set the View Security for Administrator, Department Heads, HR, and Managers. To select multiple options, hold down the control key and use the mouse to select another option. Click Save to add or save the changes. My third group is DA for Disciplinary Actions, where only HR and Administrator are only allowed viewing rights.

The screenshot shows a window titled "GROUP MAINTENANCE". It has three input fields: "Group:" with the value "DA", "Descr:" with the value "DISCIPLINARY ACTION", and "View Security:" with a dropdown menu. The dropdown menu is open, showing a list of options: "EVERYONE", "A: Administrator" (highlighted in blue), "D: Department Head" (highlighted in blue), "H: Human Resources" (highlighted in blue), "M: Manager", and "P: Payroll". A "Save" button is located at the bottom right of the window.

With all my Employee Application Groups set up, to complete the security, we need to assign a security level to employees who may view documents. The Security Level is assigned to the employee in the Personnel File Maintenance screen (pr460-mt) using the 'Other' option. Below, Bugs Bunny is assigned as an Administrator for the drop down list (created from the Codes Master 'IS' table).

The screenshot shows the 'PERSONNEL MAINTENANCE' screen for employee 'Bugs B. Bunny' (Emp#: 18, SS#: 231-54-0018). The 'DocMgr Security' dropdown menu is open, showing the following options:

- NONE
- A: Administrator (highlighted)
- D: Department Head
- H: Human Resources
- M: Manager
- P: Payroll

Other visible fields include: Drive Lic: DR213131, Phone: 414/212-5222, Est Income: .00, Gender: Male, Ethnic: white, EEOC Class: TECH, EEOC Func: 01 FINANCIAL ADMINISTRATOR, Email NOD: yes, and Email: @adginc.net.

On selecting 'DocMgr', we added a document (picture) of Bugs Bunny (see section 3a) with a group code of ID (viewable by everyone). We also added a Disciplinary Action document with a group code of DA (viewable by HR and Administrator). Because current user's employee record has HR security, we see the following:

The system can only determine who the employee is by matching their FMS login id with their employee number. In the employee master, TmCard option, enter the employees login. Even if you do not use time cards, this value must be updated to show the allowable documents.

The screenshot shows the 'TIME CARD SETUP' screen with the following fields:

- F/M/L/S: Tweety
- Addr: 30 N
- Addr2:
- City: ADCVI
- CREATE T/C: yes
- LOGIN ID: TP
- T/C GROUP: UT
- 80111

5. Web Requisitions DocManager

The web interface for Requisitions supports DocManager. The web interface requires additional setup to work properly.

The DocManager Setup for the Requisition application must have a Web Directory identified.

APPLICATION INFO

Update the default directory where files are stored for this application. The files copied to the directory and the file name is assigned based on the next file# and file extension.

Descr: Requisitions

Directory: c:\adg3\fms\docs\

Web Directory: /fmsdocs/

Next File#: 00000009

The web server must have the Web Directory identified above setup as a virtual directory which points to the actual directory on the database server where the documents are being saved (eg. <C:/adg/docs>) for the Requisition application.

The new Web ADG applications must be installed. The DocManger interface uses the php programs in the new system to transfer the files from the client system to the server. In the New Web application's Master Parameter Setup, update the FMS tab's Item# 5 to for the connection parameters to the FMS database.

*** FMS Master Parameters**

Parameters Maintenance Filters Sorts				
Item Number	Description	Value	Organizational Overrides Exist	
6	FMS Employee Source	L		
1	Email address for FMS NODs bills etc			
2	Email Account From Name			
5	FMS Legacy System Parameters	govbgt -H localhost -S FMS -T c:\adg\web\temp		
6	FMS Employee Source	L		
7	Data Source For Applicant Tracking (W/L)	** TO BE ASSIGNED **		

Showing 1 To 5 Of 5 Records

Once the web setup requirements are completed, a requisition will display an additional tab labeled 'DocManager'. Selecting the DocManager tab sdisplay existing documents for the requisition or allow you to add new ones.

View Requisition Detail

[Return to Requisitions Inbox For mjj] Requisition Print Mail To

Requisition No FN000024 **Creation Date/Time** 04/21/2010 11:59

Requisition Total 1,000.00 **Fiscal Year** 2010

Header	Lines	Notes	Action History	DocManager
WOW!!!!				
Edit Header Change Status				
New Document				
Created	By	Group	Descr	Actions
07/30/2010	mjj	BIDS		View Delete
07/30/2010	mjj	BIDS	New Bid	View Delete
07/01/2010	MJJ	BIDS	Sample Bid	View Delete

Selecting the New Document Button allows you to add a document to the requisition.

Upload To Doc Manager

Instructions

- Select the group classification for the document.
- Enter a brief description for the document selected.
- Enter the document path and file name or use the browse button to find the file.
- Click the Upload button to save and assign the document.

Requisition# FN000025

Group Code [BIDS] Vendor Bids

Description Quote from United Auto for Supplies

Upload File C:\temp\broncoticket.pdf Browse...

Upload Cancel

webrq915amt

Select the Group Code, enter a description for the document, and use the browse button to select the file from your system to be saved. Select 'Upload' to save the document.