

docMgt Importer/Exporter Add-Ins

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Introduction

Welcome to docMgt Importer/Exporter Add-Ins

docMgt Importer and Exporter are client tools that are used to bring data and documents into and out of docMgt. They have a very robust set of base features to get 95% of the job done. It is for the other 5% that we have created the Add-In system.

This help file is broken down into one section for Importer and another for Exporter. Inside those sections it is further broken down into one section per Add-In. Find the Add-In by navigating the table of contents or the page list.



Installing Add-Ins

Installing Add-Ins

Importer and Exporter are designed to do their work based on the folder in which the config.dmicfg / config.dmecfg file is located. That is considered the "base" folder for that import or export. Add-Ins are installed in the "_Addins" folder just under the base folder. Anything in this folder will be loaded as an Add-In (if possible).

If you have a compiled Add-in file (DLL file) then all you need to do is drop it into the _Addins folder and it will be loaded the next time Importer or Exporter runs. You can also create folders under the _Addins folder that can hold the Add-Ins. This is useful for keeping things organized and for making sure the Add-Ins execute in the proper order.

Cloud Add-Ins

If you are installing an Add-In from the cloud then you can click the "Load from Cloud" button to see the list of available Add-Ins. Once you find the Add-In you wish to install, double-click it in the list. This will copy the proper files for the selected Add-In from the cloud to the local _Addins folder. Each cloud-installed Add-In is installed into its own sub-folder under the _Addins folder. The folders are named to ensure they operate in the proper order compared to all other cloud Add-Ins. If you have self-installed Add-Ins, be sure they are named properly to ensure they operate in the correct order.

The screenshot shows the 'Add-Ins' window with two main sections: 'Installed' and 'Available Add-Ins'.

Installed: Contains one entry, 'docMgt POP3 Retriever', with buttons for 'Configure Add-In' and 'Remove Add-In' below it.

Available Add-Ins: Contains a table of available add-ins. A green button 'Load from Cloud' is in the top right corner of this section.

Name	Description	Date	Version
docMgt FTP/SFTP Retriever	Downloads files from the defined...	2/27/2020	1.0.7209.23462
docMgt POP3 Retriever	Download messages from POP3...	2/27/2020	1.0.6772.25153
docMgt SQL to CSV	Queries SQL server and writes r...	2/27/2020	1.0.6838.30725
docMgt File Rename	Renames files before the current...	2/27/2020	1.0.6773.13220
docMgt PDF Merge	Merges PDFs into a single PDF ...	2/27/2020	1.0.7202.23336
docMgt Barcode Split	Splits PDF and TIF document us...	2/27/2020	1.0.6865.21162
docMgt Add CSV Header	Adds a header to CSV files	2/27/2020	1.0.6791.19753
docMgt Barcode Reader	Reads barcodes from images by...	2/27/2020	1.0.7134.28585
docMgt Convert XLS to CSV	Converts XLS and XLSX files to ...	2/27/2020	1.0.7080.22878
docMgt CSV Tracker	Removes lines from CSV file as t...	7/20/2018	1.0.6772.25716
docMgt Full Text Import	Imports full text generated from o...	7/20/2018	1.0.6774.30240
docMgt TIF 2 PDF	Converts TIF files to PDF before...	8/9/2018	1.0.6795.29536
docMgt Tronitech Conversion	Converts Tronitech file format to...	2/27/2020	1.0.7277.26941

At the bottom of the 'Available Add-Ins' section is a button labeled 'Install / Update Selected Add-In'.

Order of Execution

Add-Ins will be executed in the order they are loaded. They are loaded in alphabetical order first by folder name (main "_Addins" folder first) and then by DLL name. To ensure the Add-Ins execute in the proper order, name the DLLs and folders in such a way as the ones that need to execute first have a higher named order than the ones that execute next.

Usually it is not an issue with their order as they execute when the event they are listening for is triggered.

However, if you have 2 Add-Ins that are listening to the same event you may (and probably do) want them to execute in a specific order. That is when you need to worry about the naming.

Importer Add-Ins

Importer Add-Ins

docMgt Importer is used to bring information into docMgt. The base Importer installation can import raw documents that can be parsed for index values. It can also import CSV files that contain index values as well as pointers to documents to associate with those index values.

The following is a list of public Add-Ins that are available via the "Load Add-Ins from Cloud" button option.

Add CSV Header

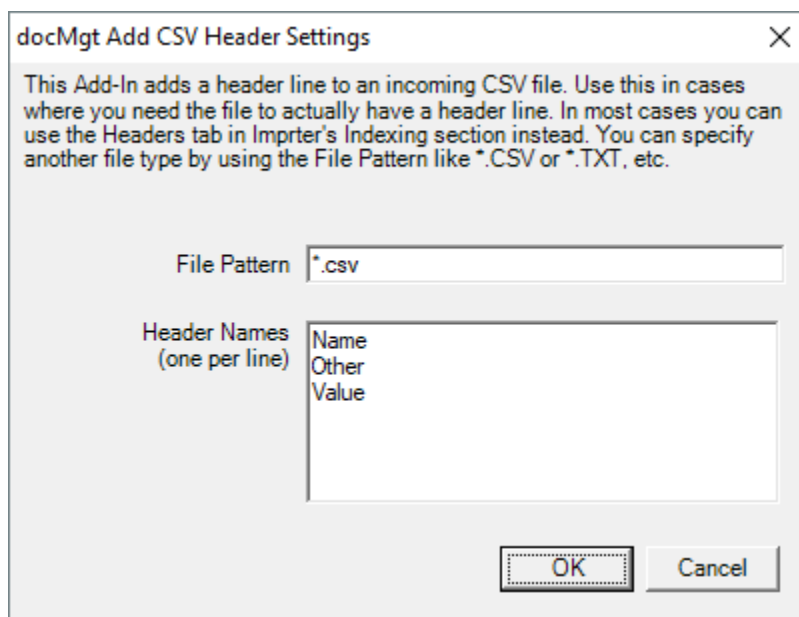
MINIMUM IMPORTER VERSION: 3.20.0001.0001

EVENT: FolderBeforeImport

SYNOPSIS: Adds a configurable header row to a CSV file before importing

DESCRIPTION: There are times when you need to have a header on the incoming CSV files even though Importer can proceed without. Other Add-Ins sometimes need to read the headers to do their work and this Add-In can help.

CONFIGURATION: You must set the Header values to use. You can optionally set a file pattern.



File Pattern: You can use wild cards (* and ?) to specify the names of the files to which to add a header. If you want all files then use *.*. For only CSV files use *.csv, etc.

Header Names: Add one column header on each line. These are the values that will be added in the header line of the output CSV.

Backup Files

MINIMUM IMPORTER VERSION: 3.20.0001.0001

EVENT: FolderBeforeImport, FolderAfterImport

SYNOPSIS: Copies or moves files before and/or after the import process

DESCRIPTION: Backup Files will copy or move files while importing. You can configure it to copy files before or after the import cycle. Typically the BEFORE option is used to move things into the Import folder for importing or to copy files from the import folder to a back up folder for historical logging. The AFTER option is used more for moving files that are left over after the import cycle runs or even to copy the import log files to another location.

CONFIGURATION: You can have one set of files to copy/backup for the BEFORE and one set for the AFTER.

docMgt Backup Files Settings

This Add-In copies or moves files before and after the import cycle. You can specify a pattern (*.pdf, *.csv, etc.) with which to match files or leave empty for all files.

Before Import

File Pattern: *.pdf

From Folder: [Browse]

To Folder: _Backup\Pre\ [Browse]

Create Folder: ☒ Create folder if it does not exist

Move Files: ☐ Move files instead of copying

After Import

File Pattern: *.*

From Folder: _Backup\Pre\ [Browse]

To Folder: _Backup\[MONTH][YEAR]\ [Browse]

Create Folder: ☒ Create folder if it does not exist

Move Files: ☒ Move files instead of copying

OK Cancel

Before and After are configured the same.

File Pattern: You can use wild cards (* and ?) to specify the names of the files to copy or move. If you want all files then use *.*. For only PDFs use *.pdf, etc.

From Folder: The folder from which to copy files. This is also considered the "source" folder. This can be an absolute path or a path that is relative to the base folder.

To Folder: The folder to which to copy files. This is also considered the "destination" folder. This can be an absolute path or a path that is relative to the base folder.

Create Folder: If checked ON then the specified folder will be created if it does not exist. If checked OFF and the folder does not exist then an error will be thrown.

Move Files: If checked ON then the files will be moved from source to destination. If checked OFF then the files will be copied only.

Barcode Reader

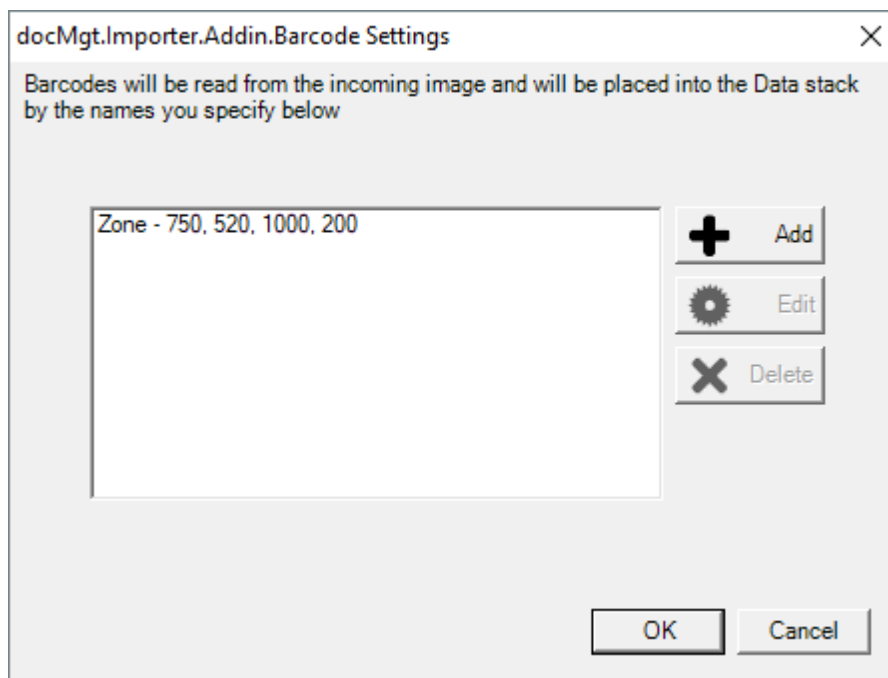
MINIMUM IMPORTER VERSION: 3.20.0001.0001

EVENT: FileBeforeImport

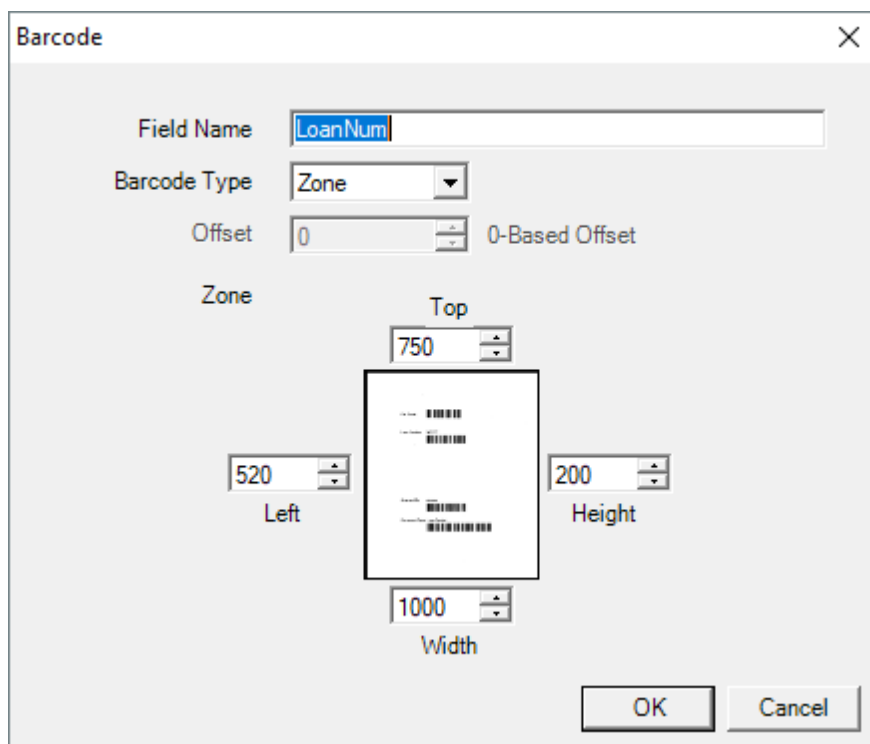
SYNOPSIS: Reads bar code values from imported images and places them into the indexing data

DESCRIPTION: Barcode Reader reads standard bar codes from the incoming images. The bar codes can be read using zones (top, left, width, height) or by Offset (1st bar code in document, 2nd bar code in document, etc.). The resulting bar code value is added to the indexing information and is assigned the index name for which it is configured. You can add as many bar code entries as you need to the configuration.

CONFIGURATION: You can Add, Edit or Delete your bar code from the bar code list. The order in which they show up in this list is not important.



When you add or edit a bar code you will see this screen.



The image shows a 'Barcode' configuration dialog box. It has a title bar with a close button (X). Inside, there are several input fields and a central preview area. The 'Field Name' field contains 'LoanNum'. The 'Barcode Type' dropdown is set to 'Zone'. The 'Offset' field contains '0', with a label '0-Based Offset' next to it. Below these are four coordinate fields: 'Top' (750), 'Left' (520), 'Width' (1000), and 'Height' (200). A central preview window shows a sample barcode with the text 'LoanNum' above it. At the bottom right are 'OK' and 'Cancel' buttons.

Field Name: Be sure to assign the bar code value to a Field Name. This is the name that is given to the value that is read and is used to refer to that value for searching and entry in docMgt.

Barcode Type: Select a Barcode Type of Zone or Offset.

Offset: If you select OFFSET type then you need to specify which bar code will be used for this value. This is a 0-based offset number so the first bar code on the page is offset 0, the second is offset 1 and so on. The bar codes are read from top to bottom, left to right.

Zone: If you use the ZONE type then you will need to know the relative position of the bar code on the page in top, left, width and height coordinates.

Barcode Split

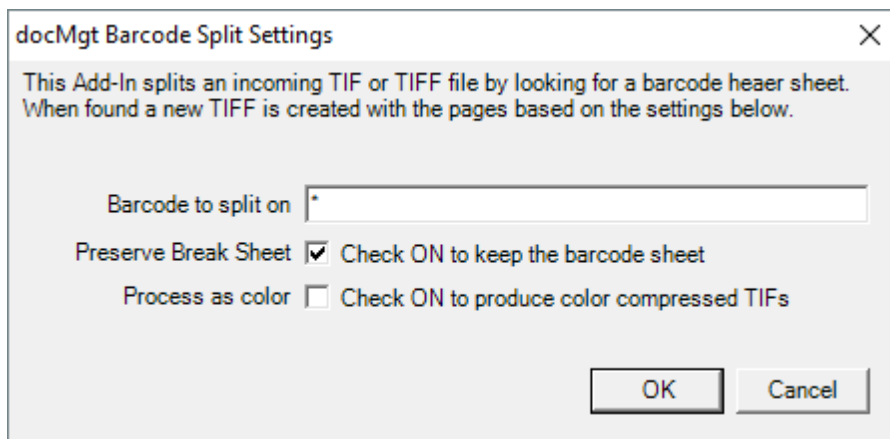
MINIMUM IMPORTER VERSION: 3.20.0001.0001

EVENT: FolderBeforeImport

SYNOPSIS: Reads bar code values from files and splits them based on the bar codes found.

DESCRIPTION: Barcode Split reads standard bar codes from the incoming images and splits the images into separate images when necessary.

CONFIGURATION: You need to set the BARcode to split on and can optional choose to preserve the break sheet or process as color options.



Barcode to split on: The value to look for within the barcodes. When a match is found then the page it is found on is considered a break sheet. The matching logic looks for an exact match of the value first and if the match is not found then it uses a LIKE statement for matches. Here is an [article on LIKE statements](#) so you can determine how to configure this setting.

Preserver Break Sheet: If turned ON then the page where the barcode is found is kept. If turned OFF then it is discarded. Usually only turned on she specific break sheets are added to the image just for splitting purposes.

Process as color: If the images being split have color attributes (i.e. no bitonal or black and white) then turn this on. If ON then the output images will be color as well.

Clean Empty Folders

MINIMUM IMPORTER VERSION: 3.20.0001.0001

EVENT: FolderAfterImport

SYNOPSIS: Removes empty folder after the import cycle

DESCRIPTION: Clean Empty Folder will delete any folder that is empty under the base folder once the import cycle is done. This is useful for cleaning up processing folders from other Add-Ins. For instance, the POP3 Add-In will download emails into their own folders. After Importer is done importing the emails there are empty folders left over. The Clean Empty Folders Add-In is a perfect compliment to POP3 in that it will remove those folders when importing is done.

CONFIGURATION: There is no configuration needed for this Add-In.

Convert XLS to CSV

MINIMUM IMPORTER VERSION: 3.20.0001.0001

EVENT: FileBeforeImport

SYNOPSIS: Converts XLS and XLSX files to CSV

DESCRIPTION: Convert XLS to CSV will convert incoming XLS and XLSX (Excel) files to CSV. This is very useful when you have spreadsheets coming into the import folders when Importer only works with raw documents and CSV files. Before the file is imported, the first (and ONLY the first) worksheet is converted to CSV.

CONFIGURATION: There is no configuration needed for this Add-In.

CSV Compare

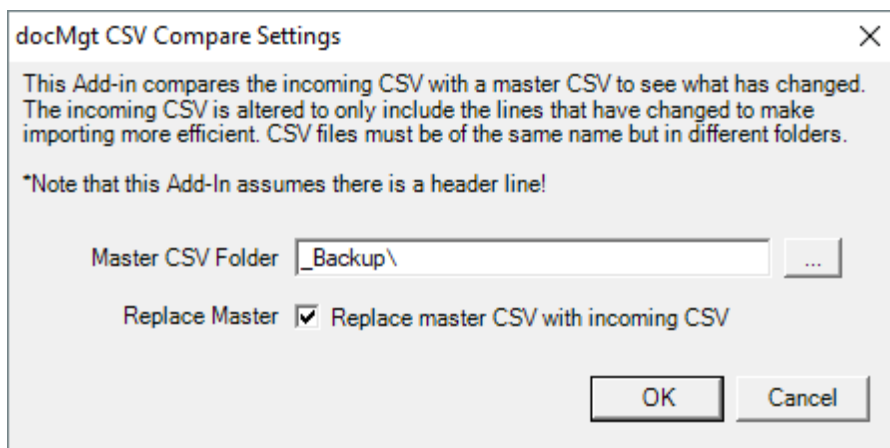
MINIMUM IMPORTER VERSION: 3.22.0000.0000

EVENT: FileBeforeImport

SYNOPSIS: Compares an incoming CSV with a previously stored CSV to look for changes. Any line not changed is ignored so only the changed or added lines are imported.

DESCRIPTION: CSV Compare is used to reduce the time and bandwidth required to keep docMgt data up to date with an exterior data source. The initial CSV file is imported as usual and a copy is made in the Master CSV Folder for the next cycle. The next time a CSV is processed it is compared to the local version and only the changes are imported. This reduces the load on the docMgt server having to do match and merge functionality.

CONFIGURATION: You need to specify the Master CSV Folder and can select whether or not to replace the master after processing.



Master CSV Folder: This is where the master CSV is that the incoming CSVs are compared with. This path needs to be created before the Add-In runs to avoid errors.

Replace Master: If ON then the master CSV file is replaced with each incoming CSV file. This is perfect when each CSV that comes in is a complete copy of all current data. If OFF then this option will use the master to compare but will never update it.

CSV Remove Lines

MINIMUM IMPORTER VERSION: 3.47.8168.28097

EVENT: FileBeforeImport

SYNOPSIS: Re-writes the incoming CSV file after removing lines that match your criteria

DESCRIPTION: CSV Remove Lines allows you to remove extra lines from a CSV before importing. It is common that some systems produce extra lines in the CSV that you may not need. In this case you can configure this Add-In to remove those lines.

CONFIGURATION: Add the Column Names and the Match Values that need to exist for this to be considered a row to remove. In the example below, the Add-In will remove all lines where "Repair Order" is blank.

This Add-In will remove lines from a CSV that meets a certain criteria. Enter the Values that should be in the Columns in order to remove the line.

	Column Name	Match Value
▶	Repair Order	
✱		

All the lines that match the criteria above will be REMOVED from the CSV before import!

OK Cancel

CSV Tracker

MINIMUM IMPORTER VERSION: 3.20.6768.26476

EVENT: CSVAfterImport

SYNOPSIS: Re-writes the incoming CSV file after each line is imported to provide better fault tolerance for importing.

DESCRIPTION: CSV Tracker is designed to keep track of each CSV line that is imported and re-write the CSV file so if the import cycle is interrupted you can resume the import without causing duplicates. Each row of the CSV is removed just after it is imported to ensure it is not going to be imported again.

IMPORTANT: This Add-In assumes that the row imported is the second in the CSV and that the first row is the header - which is standard functionality in Importer. If you have any any custom add-ins that change this behavior you should NOT use this Add-In.

CONFIGURATION: There is no configuration needed for this Add-In.

Error Alert

MINIMUM IMPORTER VERSION: 3.37.0000.0000

EVENT: FolderAfterImport, FileAfterImport, FileAfterDelete, DocumentAfterImport, DocumentAfterUpload, DocumentAfterDelete

SYNOPSIS: Watches for errors and sends alerts when they are encountered.

DESCRIPTION: Error Alert watches the Errors.log file for changes. When a change is found an alert can be sent.

CONFIGURATION: You need to specify when to look for the errors and how to alert. Then you need to specify the required information for the alert type. For example, for email alerts you need to specify the SMTP server, user/pass, From Address, To Address, etc.

docMgt Error Alert Settings

This Add-In allows you to send out alerts when errors occur. You must specify at least one WHEN and one HOW in order to receive alerts.

When and How to Notify | Email Properties

When to Notify

- ☒ Notify After Each Folder
- ☒ Notify After Each File
- ☒ Notify After Each Document

How to Notify

- ☒ Send Emails for Errors (Configure Email Properties)

Do not send log files if they contain sensitive information such as PII [More Info](#)

OK Cancel

When to Notify: Check on all the times to check for errors. If you check after each document you may get a new email for each document failure if the failure is happening for each document. If you do it only for each folder then you may only get one email after the entire import process is done. You have to balance out the needs with the amount of emails you can handle. In some cases you may overload your email account and get your mail box shut down so be careful.

How to Notify: Specify which way(s) you wish to be notified. The only available option is Email at the time of this writing. Once you specify the HOW you then need to set the properties appropriately.

docMgt Error Alert Settings [X]

This Add-In allows you to send out alerts when errors occur. You must specify at least one **WHEN** and one **HOW** in order to receive alerts.

When and How to Notify [Email Properties]

SMTP Settings | Email Message

Server: []


Port: [587]

SSL: ☒ Server Requires SSL

Username: []

Password: []

[Test Email Settings]

 **Do not send log files if they contain sensitive information such as PII** [More Info](#) [OK] [Cancel]

docMgt Error Alert Settings [X]

This Add-In allows you to send out alerts when errors occur. You must specify at least one **WHEN** and one **HOW** in order to receive alerts.

When and How to Notify [Email Properties]

SMTP Settings | Email Message


From Address: []

To Address: []

Attach Log: ☒ Send Log File in Email

Email Subject: [Importer Error]

Email Body: [An error has occurred in the importer. View the attached log file for details.
Importer location:
[]]

 **Do not send log files if they contain sensitive information such as PII** [More Info](#) [OK] [Cancel]

Extract ZIP Files

MINIMUM IMPORTER VERSION: 3.37.0000.0000

EVENT: FolderBeforeImport

SYNOPSIS: Extracts ZIP files into the folder where they are found

DESCRIPTION: This Add-In is designed to extract ZIP files. All ZIP files that are in the folder will be extracted and then deleted. If there is an error extracting the ZIP then it will not be deleted and it will be skipped until the next cycle.

CONFIGURATION: There is no configuration needed for this Add-In.

NOTE: This runs BEFORE the BACKup Add-In so you will only be able to back up the extracted files and not the ZIP files. If you need to back them up you may wish to use a BAT or CMD file or some other process before import.

File Rename

MINIMUM IMPORTER VERSION: 3.20.0001.0001

EVENT: FolderBeforeImport

SYNOPSIS: Renames the incoming files using wild card techniques.

DESCRIPTION: File Rename will rename the incoming files by using wild card replacements or static values. If you replace with a static value then the file will be renamed as the static value with no wild card replacements. If you use wild cards then the file is named more intelligently.

CONFIGURATION: You need to specify the source file's wild card (FROM) and the destination file's wild card (TO).

Source Wildcard: The wildcard that is used to determine which files to rename. This uses the standard .NET path searchPattern techniques as outlined in [this Microsoft article](#).

Destination Wildcard: This wildcard uses a similar technique to replace the file name values to create a new file name.

EXAMPLE

The following patterns and files show how the rename would work:

Source Wildcard	Destination Wilcard	Incoming File	Renamed File
Abc???.abc	*.csv	Abc123.abc	Abc123.csv
*.txt	*.csv	12345.txt	12345.csv
TMP*.TXT	BAT*.TXT	TMP090909.TXT	BAT090909.TXT

FTP / SFTP

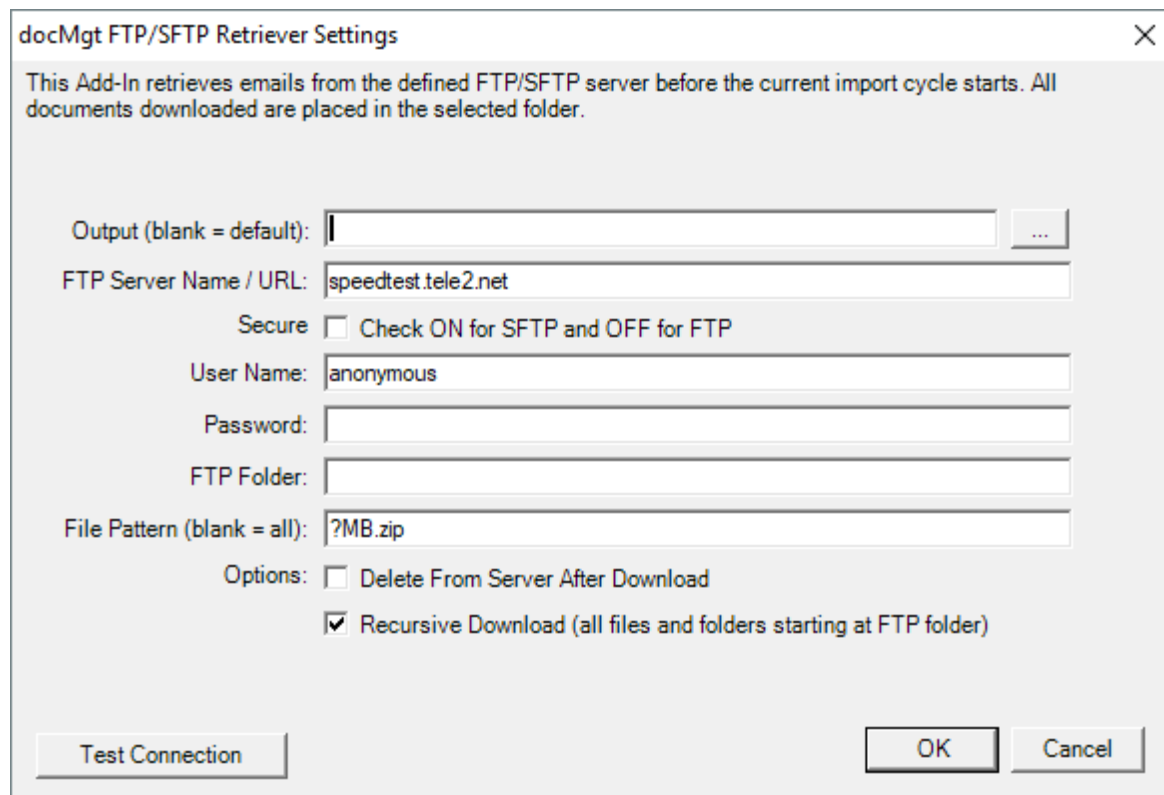
MINIMUM IMPORTER VERSION: 3.20.0001.0001

EVENT: FolderBeforeImport

SYNOPSIS: Calls FTP / SFTP server to download files before the import cycle.

DESCRIPTION: FTP / SFTP is designed to download files from an FTP/SFTP server so those files can be imported. Before a folder is processed, this Add-In will contact the configured FTP/SFTP server and download any files that it needs and write them to the output folder. Then the Importer will proceed with its import cycle to import the downloaded files.

CONFIGURATION: You need to specify the folder in which to write the downloaded files, the FTP/SFTP server information and the files to download.



The dialog box is titled "docMgt FTP/SFTP Retriever Settings" and includes a close button (X) in the top right corner. Below the title bar, a message states: "This Add-In retrieves emails from the defined FTP/SFTP server before the current import cycle starts. All documents downloaded are placed in the selected folder." The settings are organized into several sections:

- Output (blank = default):** A text field with a browse button (...).
- FTP Server Name / URL:** A text field containing "speedtest.tele2.net".
- Secure:** A checkbox labeled "Check ON for SFTP and OFF for FTP".
- User Name:** A text field containing "anonymous".
- Password:** A text field.
- FTP Folder:** A text field.
- File Pattern (blank = all):** A text field containing "?MB.zip".
- Options:**
 - ☐ Delete From Server After Download
 - ☒ Recursive Download (all files and folders starting at FTP folder)

At the bottom, there are three buttons: "Test Connection", "OK", and "Cancel".

Output: The folder in which to write the downloaded files. If you leave it blank then the base import folder will be used.

FTP Server Name / URL: The IP address or URL of the FTP server. Do NOT include the FTP:// in the URL. Just use the server name/IP.

Secure: Check this ON to use SFTP and OFF to use standard FTP.

User Name: The user name to use to authenticate to the FTP server. If anonymous accounts are used then the server will sometimes expect the name "anonymous" with no password.

Password: The password to use to authenticate to the FTP server.

FTP Folder: The folder on the FTP server to find the files to download.

File Pattern: The pattern of the file names to download. Use wild cards such as * and ? that your FTP server will be familiar with.

Delete: Whether or not to delete the files from the FTP server after download.

Recursive: If checked ON then all folders under the FTP Folder will be downloaded. If checked OFF then only the files directly in the FTP Folder will be downloaded.

Full Text Importer

MINIMUM IMPORTER VERSION: 3.20.6774.30656

EVENT: DocumentAfterImport

SYNOPSIS: Imports externally generated OCR data

DESCRIPTION: Full Text Importer will look for the presence of an OCR file after any document is imported. The OCR file must be named the same as the document but with .OCR or .OCRCSV on the end depending on the format. For example, after a document named SCANNED.PDF is imported, this Add-In will look for a file named SCANNED.PDF.OCR (or SCANNED.PDF.OCRCSV). If that file exists then the Add-In will use that file's data as the OCR data for the given document.

CONFIGURATION: There is no configuration needed for this Add-In.

File Formats: There are 2 file formats supported - OCR and OCRCSV.

OCR

This format is a JSON encoded list of docMgt.dmREST.Word items. Use the docMgt.RESTHelper DLL as a reference to get that object type. If you use this method then you will need to standardize your word coordinates to the docMgt standard. You can use the docMgt.RESTHelper.StandardizeFullTextCoordinates method to translate your coordinates to the standard.

OCRCSV

This is a CSV file that has no headers. The columns need to be "Word, Page, Left, Top, Width, Height, Image Width, Image Height" in that order. Here is a sample:

```
Word One,1,10,20,300,50,880,1100
Word Two,1,330,20,300,50,880,1100
Word Three,1,660,20,300,50,880,1100
```

That example would be 3 words total - all for page 1 of the document. "Word One" would have come from the zone of 10, 20, 300, 50 from an image that was 880 pixels wide and 1100 pixels tall and so on. We need the last 2 items (image size) to standardize the coordinates to our normal coordinate system. Otherwise the highlighting would be off.

IMAP Emails

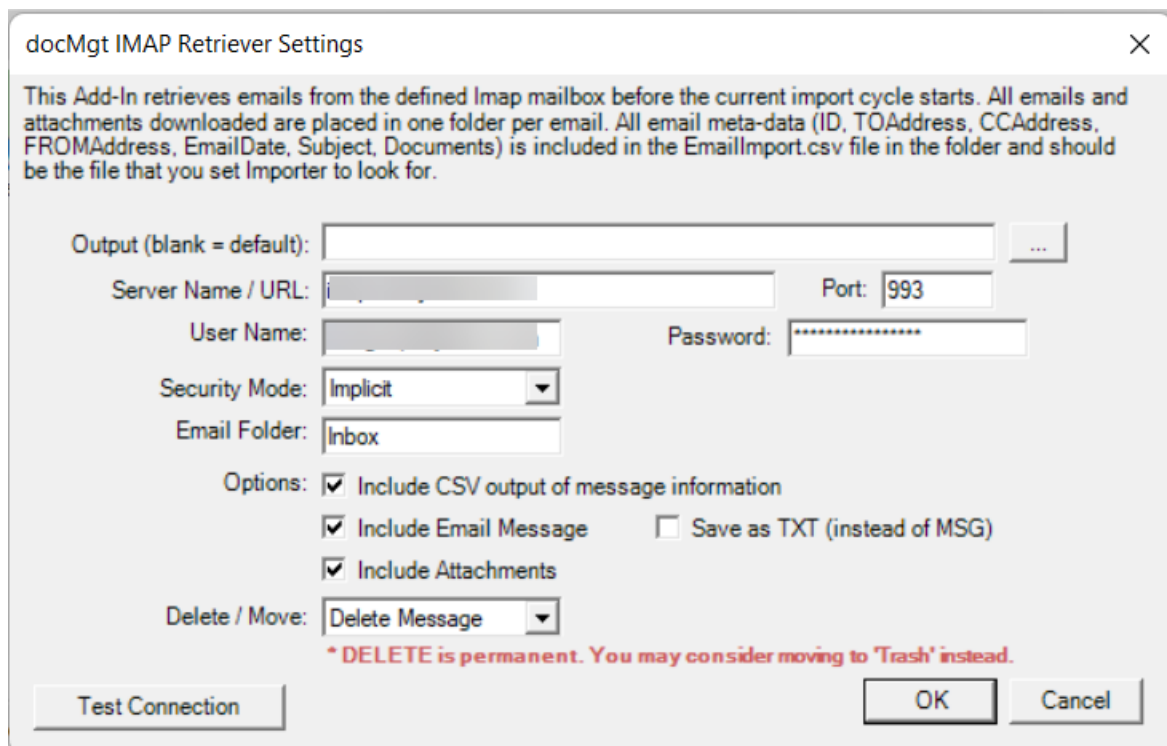
MINIMUM IMPORTER VERSION: 3.37.0000.0000

EVENT: FolderBeforeImport

SYNOPSIS: Calls IMAP Email server to download emails and attachments as files before the import cycle.

DESCRIPTION: IMAP is designed to download emails and attachments as files from a IMAP Email server so those files can be imported. Before a folder is processed, this Add-In will contact the configured IMAP server and download any messages that it needs and write them to the configured output folder. Each email will have its own folder to avoid any naming conflicts. When done, Importer will proceed with its import cycle to import the downloaded files.

CONFIGURATION: You need to specify the folder in which to write the downloaded emails, the IMAP Email server information and the appropriate options.



The dialog box is titled "docMgt IMAP Retriever Settings" and includes a close button (X) in the top right corner. Below the title bar, there is a descriptive text block: "This Add-In retrieves emails from the defined Imap mailbox before the current import cycle starts. All emails and attachments downloaded are placed in one folder per email. All email meta-data (ID, TOAddress, CCAAddress, FROMAddress, EmailDate, Subject, Documents) is included in the EmailImport.csv file in the folder and should be the file that you set Importer to look for."

The settings are organized as follows:

- Output (blank = default):** A text field with a browse button (three dots) to its right.
- Server Name / URL:** A text field.
- Port:** A text field containing the value "993".
- User Name:** A text field.
- Password:** A text field with masked characters (dots).
- Security Mode:** A dropdown menu currently set to "Implicit".
- Email Folder:** A text field containing the value "Inbox".
- Options:** A group of three checkboxes:
 - ☒ Include CSV output of message information
 - ☒ Include Email Message
 - ☐ Save as TXT (instead of MSG)
 - ☒ Include Attachments
- Delete / Move:** A dropdown menu currently set to "Delete Message".

Below the "Delete / Move" dropdown, a red warning message states: "* DELETE is permanent. You may consider moving to 'Trash' instead."

At the bottom of the dialog, there are three buttons: "Test Connection", "OK", and "Cancel".

Output: The folder in which to write the downloaded files. If you leave it blank then the base import folder will be used.

Server Name / URL: The IP address or URL of the IMAP server.

Port: The port number to use for the server. 995 is common for secured IMAP servers.

User Name: The user name to use to authenticate to the server.

Password: The password to use to authenticate to the server.

Security Mode: IMAP email servers will typically require a security setting. Select the security mode that your server needs.

Email Folder: IMAP allows you to specify a folder to work with. This allows you to import from any folder

available. The default is "Inbox".

Include CSV: This will create a CSV file with all the meta data of the email (TO, FROM, CC, Subject) and pointers to all files created.

Include Email Message: Whether or not to write the email message out as a file.

Save as TXT: Check ON to save the plain text of the email to a TXT file. Check OFF to save the email message as an MSG file.

Include Attachments: If checked ON then all attachments will be written into the email folder.

Delete / Move: Select from "Leave Message", "Delete Message", and "Move Message"

IMPORTANT: If you choose DELETE then the message is actually permanently deleted in some systems. You could choose to just Move it to the "Trash" folder to preserve them for a while.

To Folder: If you choose to Move messages then you need to specify which folder to move them to. If you need to move to a folder inside another folder you can use the "Folder/Folder" syntax.

PDF Compression

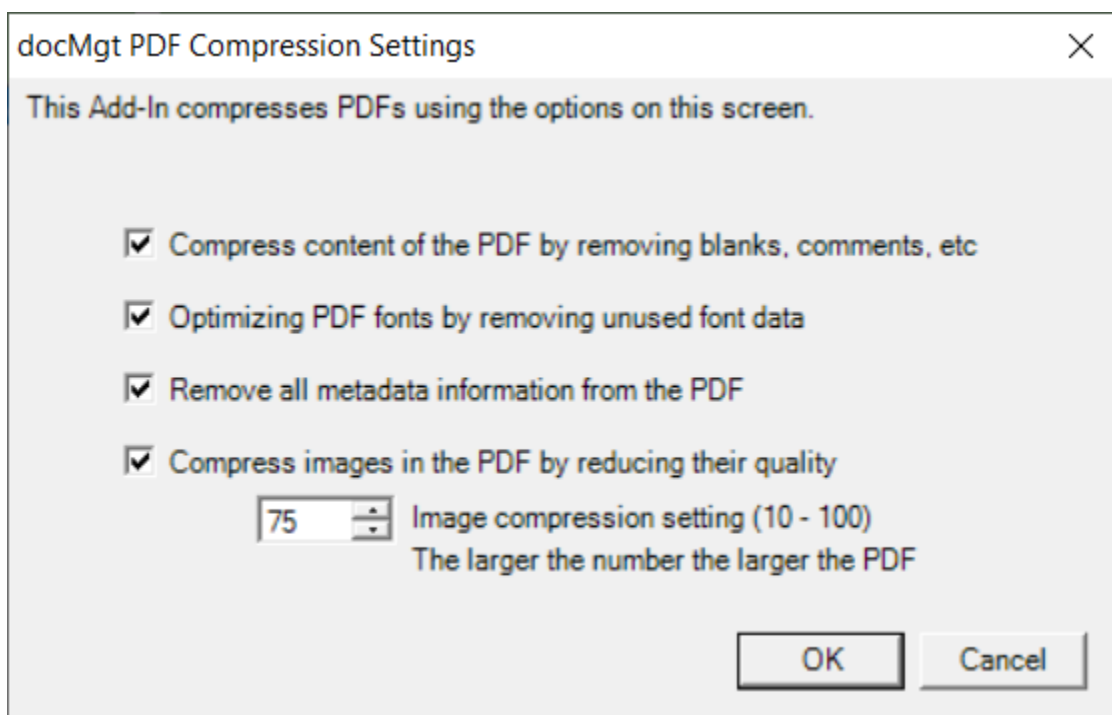
MINIMUM IMPORTER VERSION: 3.30.0000.0000

EVENT: DocumentBeforeUpload

SYNOPSIS: Compresses PDF files based on the settings configured

DESCRIPTION: This Add-In is designed to compress PDF files in various ways. You can compress the contents, fonts, meta data and images. Each has their various uses and benefits.

CONFIGURATION: You need to simply turn on the options you wish to use for compression. If you choose Image compression then you need to specify the image quality you wish to have in the output PDF.



Compress Content: This will remove extra blank spaces, invisible comments in the PDF file and other non-visible data elements.

Remove Unused Fonts: This will remove font data that is not used in the PDF. This is commonly referred to as removing the unused glyph data.

Remove Meta Data: This will remove all the data contained in the meta data section of the PDF. This will include author name, keywords, copyright and more. Be careful using this as it might remove information that you should be preserving for later use.

Compress Images: This will compress all images in the PDF using the specified percentage. The higher the percentage, the better quality of the images but also the larger the resulting PDF. It might take some testing to see which setting works best for your PDFs.

PDF Merge

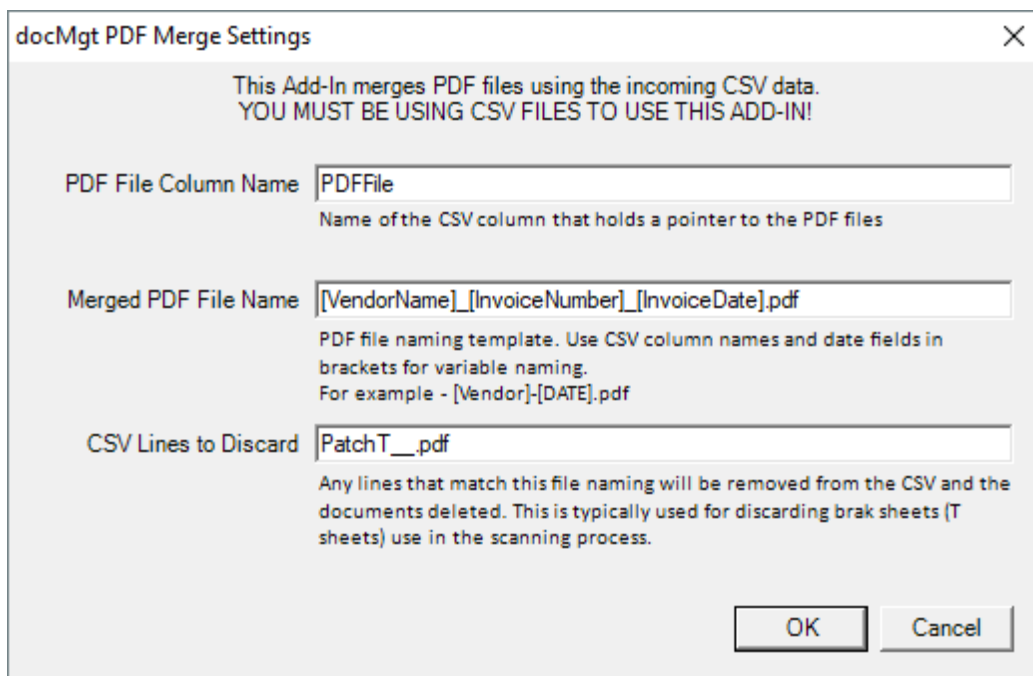
MINIMUM IMPORTER VERSION: 3.20.0001.0001

EVENT: FileBeforeImport

SYNOPSIS: Merges PDF files based on their order in the CSV file and the column values.

DESCRIPTION: PDF Merge is designed to take individual PDF documents and merge them into larger documents. This Add-In requires that you are importing CSV files with pointers to PDF files. The values in the CSV are used to merge the PDFs. As the column values match between rows, the PDFs from those rows are merged and the CSV file is updated accordingly. Once the merging is done the import proceeds as normal.

CONFIGURATION: You need to specify the PDF column name that holds the PDF pointers, the Merged PDF File Name pattern. You can optionally specify a the CSV lines to discard if you have patch sheets or separator sheets you need to remove.



The dialog box is titled "docMgt PDF Merge Settings" and includes a close button (X) in the top right corner. It contains the following fields and instructions:

- PDF File Column Name:** The text "PDFFile" is entered in the field. Below the field, it says: "Name of the CSV column that holds a pointer to the PDF files".
- Merged PDF File Name:** The text "[VendorName]_[InvoiceNumber]_[InvoiceDate].pdf" is entered in the field. Below the field, it says: "PDF file naming template. Use CSV column names and date fields in brackets for variable naming. For example - [Vendor]-[DATE].pdf".
- CSV Lines to Discard:** The text "PatchT__.pdf" is entered in the field. Below the field, it says: "Any lines that match this file naming will be removed from the CSV and the documents deleted. This is typically used for discarding brak sheets (T sheets) use in the scanning process."

At the bottom right, there are "OK" and "Cancel" buttons.

PDF File Column Name: The name of the CSV column that holds the pointers to the PDF files. This is required so we know which documents to merge.

Merged PDF File Name: This is the name of the PDF that will be created by the merge. Use brackets to specify the column name to use in the file name. This is what enables the merge. As CSV lines produce the same PDF File Name the PDFs are merged.

CSV Lines to Discard: This is the evaluated PDF File Name that represents a discarded row. If the name of the PDF b(based on the CSV data) matches this value then it is discarded. Leave blank to ignore.

EXAMPLE

Using the configuration screen above, the following CSV and PDFs would process as follows.

CSV Data:

```
VendorName,InvoiceNumber,InvoideDate,PDFFile  
ACME Corp,1234,1/1/2018,ACME-Page1.pdf  
ACME Corp,1234,1/1/2018,ACME-Page2.pdf  
Widget Co,W876,1/5/2018,WID-Page1.pdf  
Widget Co,W876,1/5/2018,WID-Page2.pdf  
Widget Co,W876,1/5/2018,WID-Page3.pdf
```

PDFs

```
WID-Page1.pdf (1-page PDF)  
WID-Page2.pdf (1-page PDF)  
WID-Page3.pdf (1-page PDF)  
ACME-Page1.pdf (1-page PDF)  
ACME-Page2.pdf (1-page PDF)
```

This would output as:

CSV Data:

```
VendorName,InvoiceNumber,InvoideDate,PDFFile  
ACME Corp,1234,1/1/2018,ACME Corp_1234_1-1-2018.pdf  
Widget Co,W876,1/5/2018,Widget Co_W876_1_5_2018.pdf
```

PDFs

```
Widget Co_W876_1_5_2018.pdf (3-page PDF)  
ACME Corp_1234_1-1-2018.pdf (2-page PDF)
```

POP3 Emails

MINIMUM IMPORTER VERSION: 3.20.0001.0001

EVENT: FolderBeforeImport

SYNOPSIS: Calls POP3 Email server to download emails and attachments as files before the import cycle.

DESCRIPTION: POP3 is designed to download emails and attachments as files from a POP3 Email server so those files can be imported. Before a folder is processed, this Add-In will contact the configured POP3 server and download any messages that it needs and write them to the configured output folder. Each email will have its own folder to avoid any naming conflicts. When done, Importer will proceed with its import cycle to import the downloaded files.

CONFIGURATION: You need to specify the folder in which to write the downloaded emails, the POP3 Email server information and the appropriate options.

docMgt POP3 Retriever Settings

This Add-In retrieves emails from the defined POP3 mailbox before the current import cycle starts. All emails and attachments downloaded are placed in on folder per email. All email meta-data (ID, TOAddress, CCAddress, FROMAddress, EmailDate, Subject, Documents) is included in the EmailImport.csv file in the folder and should be the file that you set Importer to look for.

Output (blank = default): ...

Server Name / URL:

Port:

User Name:

Password:

Security Mode: ▼

Options:

- ☐ Include CSV output of message information
- ☒ Include Email Message ☒ Save as TXT (instead of MSG)
- ☐ Include Attachments
- ☐ Delete Messages From Server

Output: The folder in which to write the downloaded files. If you leave it blank then the base import folder will be used.

Server Name / URL: The IP address or URL of the POP3 server.

Port: The port number to use for the server. 995 is common for secured POP3 servers.

User Name: The user name to use to authenticate to the server.

Password: The password to use to authenticate to the server.

Security Mode: POP3 email servers will typically require a security setting. Select the security mode that your server needs.

Include CSV: This will create a CSV file with all the meta data of the email (TO, FROM, CC, Subject) and pointers to all files created.

Include Email Message: Whether or not to write the email message out as a file.

Save as TXT: Check ON to save the plain text of the email to a TXT file. Check OFF to save the email message as an MSG file.

Include Attachments: If checked ON then all attachments will be written into the email folder.

Delete Messages from Server: If checked ON then the email messages will be deleted from the server after they are downloaded.

IMPORTANT: If you are using GMAIL then the Delete option may not work. You will need to log into GMAIL and select "Settings" / "See All Settings" / "Forwarding and POP/IMAP" and set the "When messages are accessed with POP" setting to "Archive GMail's copy" or "Delete GMail's copy"

SQL to CSV

MINIMUM IMPORTER VERSION: 3.21.0000.0000

EVENT: FolderBeforeImport

SYNOPSIS: Calls customizable SQL server query and all saves results as CSV file for import.

DESCRIPTION: SQL to CSV is designed to call SQL server for data. The SQL statement is customizable and all column names that are returned are used as column headers and all the data is written out as one row to one CSV record.

CONFIGURATION: You need to specify the SQL connection string to use and the SQL command to call. You can specify the CSV filename but it is not required. If nothing is specified the SQLOut.csv is used.

docMgt SQL to CSV Settings

Queries an SQL server to get data and saves it to a CSV in the import folder. The SQL column names become the CSV column names.

Connection string: server={local};database=YourDB;uid=sa;pwd=YourPW;

SQL Command: select F1 Agency, F2 [Tracking Number], F3 Status, F4 [Submitted By] from files where status=1

CSV File Name:

Test Connection OK Cancel

Connection string: The connection string used to connect to the SQL server. This can use any Microsoft standard SQL connection string format.

SQL Command: This is the actual SQL statement to execute to return data.

CSV File Name: This is the name only of the CSV file to create with the returned data. This file is overwritten each time it is called!

TIF 2 PDF

MINIMUM IMPORTER VERSION: 3.21.0001.0001

EVENT: DocumentBeforeImport

SYNOPSIS: Converts TIF or TIFF files to PDF before import

DESCRIPTION: Converts TIF or TIFF files to PDF before import

CONFIGURATION: There is no configuration needed for this Add-In

Exporter Add-Ins

Exporter Add-Ins

docMgt Exporter is used to bring information from docMgt to a local folder. The base Exporter installation can export raw documents and CSV data for output to other systems such as accounting systems, network folders and more.

The following is a list of public Add-Ins that are available via the "Load Add-Ins from Cloud" button option.

CSV to JSON

MINIMUM EXPORTER VERSION: 3.20.0001.0001

EVENT: RecordEnd

SYNOPSIS: Converts Exported data to JSON

DESCRIPTION: CSV to JSON converts the exported data from the default CSV format to JSON.

CONFIGURATION: There is no configuration needed for this Add-In.

The default functionality of Exporter is to output all data as CSV data. The CSV files and all documents exported are saved into a folder structure where each Record has its own folder. With this Add-In you can have the exported data converted to a single JSON file with all the CSV data included.

NOTE: This Add-In works nicely when paired with the [Merge Exported Records](#) Add-In. When using these two Add-Ins together, the Merge Records Add-In runs first and places all Data and Documents into a single export folder. Then the CSV to JSON Add-In runs and converts all the data to as single JSON file. This can make ingesting the data into other systems a little simpler.

Document Filter

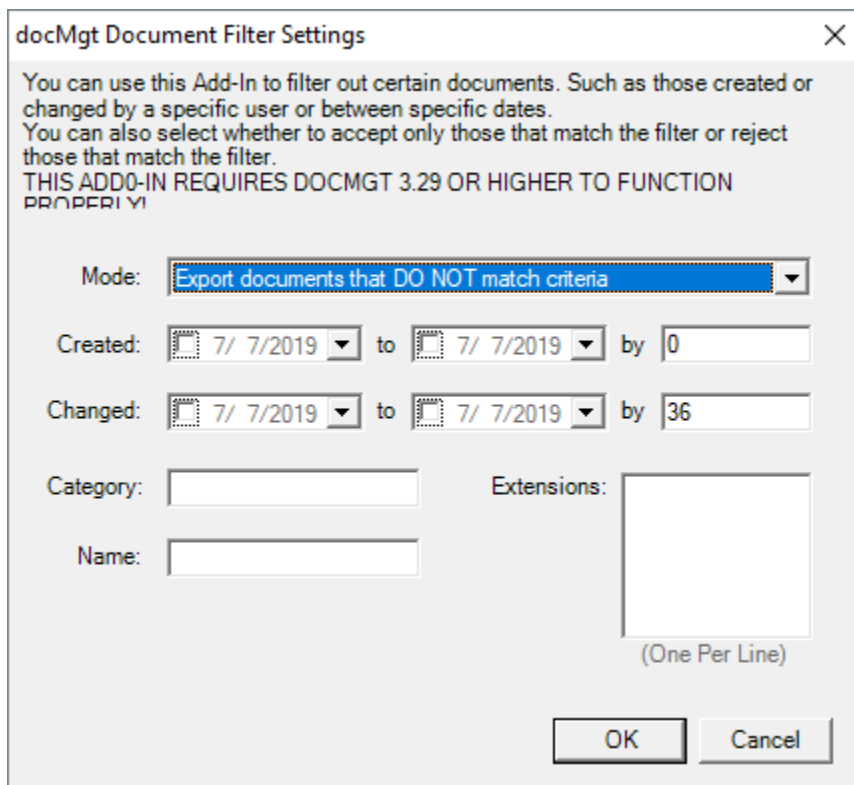
MINIMUM EXPORTER VERSION: 3.20.6775.18338

EVENT: DocumentStart, DocumentAfterWrite, DocumentBeforeWriteLine and DocumentEnd

SYNOPSIS: Filters documents that are exported

DESCRIPTION: Select which documents get exported during the export routine. Can do this by including or excluding logic.

CONFIGURATION: You need to specify mode and the filter properties.



The dialog box is titled "docMgt Document Filter Settings" and includes a close button (X) in the top right corner. It contains the following text and controls:

You can use this Add-In to filter out certain documents. Such as those created or changed by a specific user or between specific dates.
 You can also select whether to accept only those that match the filter or reject those that match the filter.
THIS ADD-ON REQUIRES DOCMGT 3.29 OR HIGHER TO FUNCTION PROPERLY

Mode: A dropdown menu showing "Export documents that DO NOT match criteria".

Created: Two date pickers set to "7/ 7/2019" with checkboxes, followed by "to" and another two date pickers set to "7/ 7/2019" with checkboxes, and "by" followed by a text box containing "0".

Changed: Two date pickers set to "7/ 7/2019" with checkboxes, followed by "to" and another two date pickers set to "7/ 7/2019" with checkboxes, and "by" followed by a text box containing "36".

Category: A text box.

Extensions: A text box with the instruction "(One Per Line)" below it.

Name: A text box.

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

Mode: Whether the filter properties are what to INCLUDE or to EXCLUDE.

Created: Filter by date range of the date the document was created or by the user who created it. If the check boxes on the date fields are off then that date value is ignored.

Changed: Filter by date range of the date the document was last changed or by the user who last changed it. If the check boxes on the date fields are off then that date value is ignored.

Category / Name: The Category and/or Name of the documents.

Extensions: The extensions of the documents to filter. This can be something like TIF, PDF, DOCX, etc. Enter one extension per line.

Document Mover

MINIMUM EXPORTER VERSION: 3.20.0001.0001

EVENT: RecordEnd

SYNOPSIS: Moves documents to configured directory after each Record is completed.

DESCRIPTION: Document Mover is designed to move documents from their default download folder to another folder. At the end of every Record download this Add-In is called to do its move. This is useful for moving documents to a standard area once downloaded via Exporter.

CONFIGURATION: You need to specify the file pattern to move, where to move the documents and whether to delete the folder once moved.

File Search Pattern: The pattern to use to find which files to move. Use *.* to move all files. You can specify multiple patterns by separating them with the pipe symbol - |.

Destination Folder: The folder in which to copy the documents. Any existing documents with the same names will be overwritten.

Destination File Name: The name you wish to use for output documents. Leave blank to use the default naming from your Exporter config.

Source Folder: Check this ON to delete the normal export folder after moving documents.

Auto Rename: Check this ON to rename documents when moving if their name already exists in the output folder. The name of the file will be incremented with a counter. For instance, if a file named ABC.TIF exists already then the next copy of that name would be ABC-1.TIF then ABC-2.TIF and so on.

Documents to Record CSV

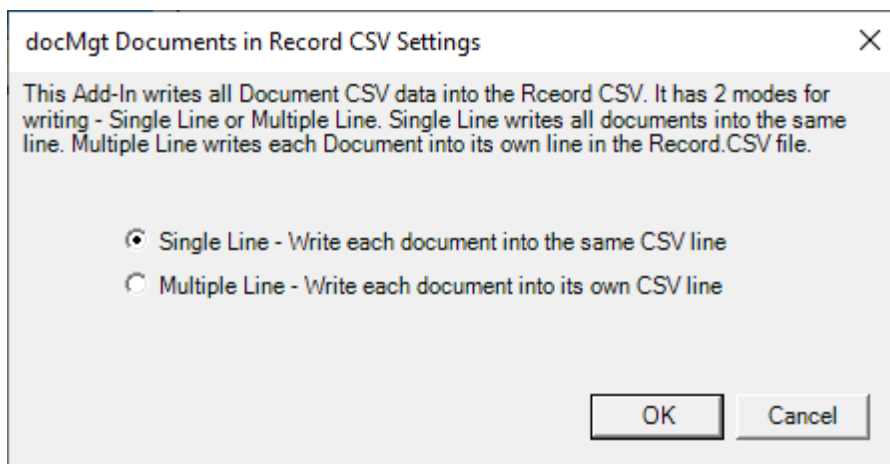
MINIMUM EXPORTER VERSION: 3.38.0000.00000

EVENT: DocumentAfterWrite, RecordBeforeWriteHeader, and RecordBeforeWriteLine

SYNOPSIS: Writes Document information into the Record CSV instead of into a special Document CSV

DESCRIPTION: Configure the Add-In to write Document Category, SubCategory, Name and FileName into the Record CSV in one of two ways. Single Line writes all Documents into a single CSV line for the Record. Multi Line writes each Document's data into its own line in the CSV file.

CONFIGURATION: You need to specify which mode to use - Single or Multiple.



Mode: Whether the write the Documents' CSV data as a single line or a line per Document.

NOTE: If you choose single line then the first document's Category, SubCategory and Name are used for those columns. Each document's file name is written at the end of the line.

Example output for each case:

SINGLE

```
ID,RecordType,Vendor,ContractDate,DocCategory,DocSubCategory,DocName,DocFile
17615,Contract
Management,ACME,6/1/2021,Contract,SubCat,Certificate,15575.pdf,15574.pdf,15573.pdf
17616,Contract Management,Test 2,6/1/2021,Contract,SubCat,Dell,15576.pdf,15577.pdf,15578.pdf
```

MULTIPLE

```
ID,RecordType,Vendor,ContractDate,DocCategory,DocSubCategory,DocName,DocFile
17615,Contract Management,ACME,6/1/2021,Contract,SubCat,Certificate,15575.pdf
17615,Contract Management,ACME,6/1/2021,Contract,SubCat,Certificate,15574.pdf
17615,Contract Management,ACME,6/1/2021,Contract,SubCat,Certificate,15573.pdf
17616,Contract Management,Test 2,6/1/2021,Contract,SubCat,Dell,15576.pdf
17616,Contract Management,Test 2,6/1/2021,Contract,SubCat,Dell,15577.pdf
17616,Contract Management,Test 2,6/1/2021,Contract,SubCat,Dell,15578.pdf
```


FTP / SFTP

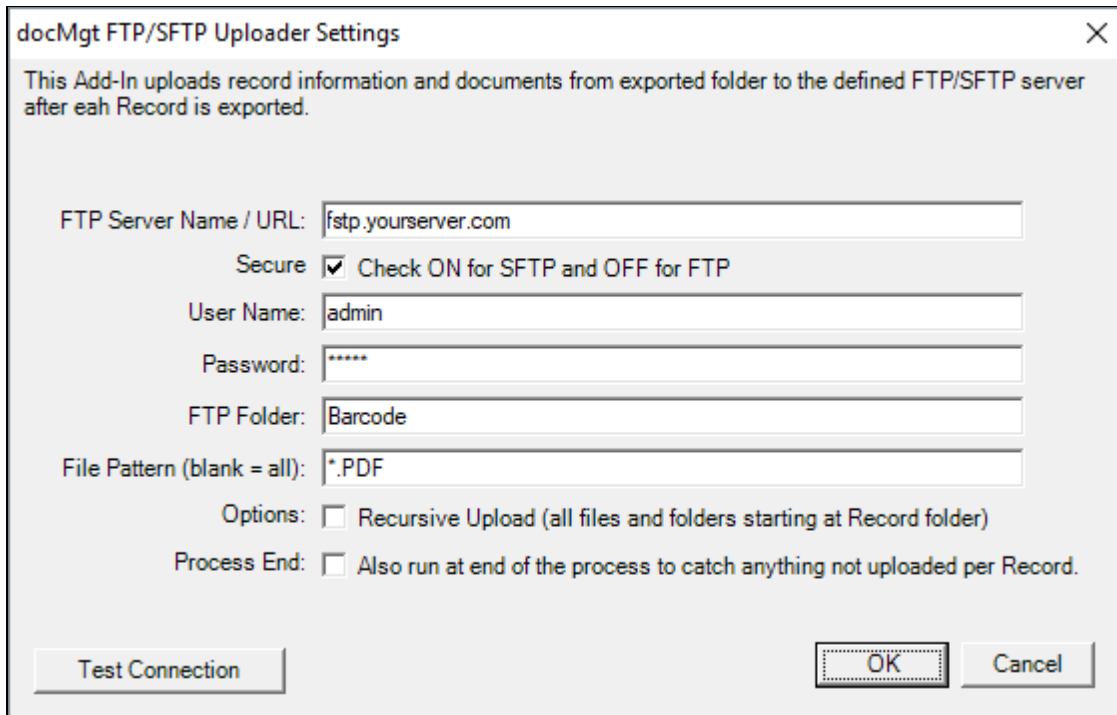
MINIMUM EXPORTER VERSION: 3.20.0001.0001

EVENT: RecordEnd

SYNOPSIS: Calls FTP / SFTP server to upload files after each Record is exported.

DESCRIPTION: FTP / SFTP is designed to upload exported files to an FTP/SFTP server. After a Record is exported, this Add-In will contact the configured FTP/SFTP server and upload the specified files from the Record folder. IMPORTANT EXCEPTION: If you are using the "Merge Exported Records" Add-In then the FTP action will not happen until all Records are exported.

CONFIGURATION: You need to specify the FTP/SFTP server information, the folder on the FTP server in which to upload and the files to upload.



The dialog box is titled "docMgt FTP/SFTP Uploader Settings" and includes a close button (X) in the top right corner. Below the title bar, a message states: "This Add-In uploads record information and documents from exported folder to the defined FTP/SFTP server after each Record is exported." The configuration fields are as follows:

- FTP Server Name / URL:** A text box containing "ftp.yourserver.com".
- Secure:** A checkbox labeled "Check ON for SFTP and OFF for FTP" which is currently checked.
- User Name:** A text box containing "admin".
- Password:** A text box containing six asterisks "*****".
- FTP Folder:** A text box containing "Barcode".
- File Pattern (blank = all):** A text box containing "*.PDF".
- Options:** A checkbox labeled "Recursive Upload (all files and folders starting at Record folder)" which is currently unchecked.
- Process End:** A checkbox labeled "Also run at end of the process to catch anything not uploaded per Record." which is currently unchecked.

At the bottom of the dialog, there are three buttons: "Test Connection" on the left, and "OK" and "Cancel" on the right.

FTP Server Name / URL: The IP address or URL of the FTP server. Do NOT include the FTP:// in the URL. Just use the server name/IP.

Secure: Check this ON to use SFTP and OFF to use standard FTP.

User Name: The user name to use to authenticate to the FTP server. If anonymous accounts are used then the server will sometimes expect the name "anonymous" with no password.

Password: The password to use to authenticate to the FTP server.

FTP Folder: The folder on the FTP server to upload the files.

File Pattern: The pattern of the file names to download. Use wild cards such as * and ? that your FTP server will be familiar with.

Recursive: If checked ON then all files in all folders under the Record folder will be uploaded. If checked OFF then only the files directly in the Record Folder will be downloaded. In a default export, there are no sub-folders in the Record folder so this is not necessary unless you have custom logic that creates sub-folders.

Process End: You can have the SFTP process happen only for each Record exported (OFF) or can also have it happen at the end of the process (ON). This is useful for when you are combining the data into a single file or if you have a custom process that produces files after the normal record exports.

Merge Exported Records

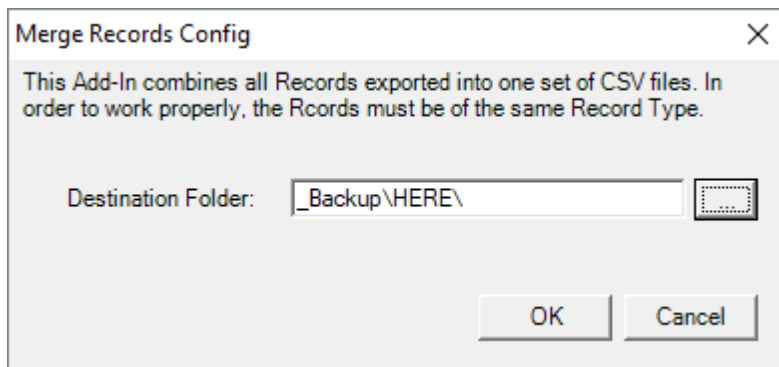
MINIMUM EXPORTER VERSION: 3.20.0001.0001

EVENT: RecordFolderPathSet, RecordBeforeWriteHeader, LineItemBeforeWriteHeader, DocumentBeforeWriteHeader

SYNOPSIS: Merges all exported Records into the same CSV file set and folder structure

DESCRIPTION: Merge Exported Records is used to make a single export structure out of all Records and Documents exported. By default, Exporter will make a new folder for each Record exported. The CSV files and documents in that folder are only for that Record. This Add-In will merge all Records exported into one folder. CAUTION: If the Records exported are not all of the same Record Type then the data in the CSV will not properly line up and can cause data loss.

CONFIGURATION: You need to specify the folder in which you wish to write the CSV and documents.



Destination Folder: The folder in which to write the information. If you leave it blank the information will be written into the base folder. The path can be relative or absolute..

PDF Merge

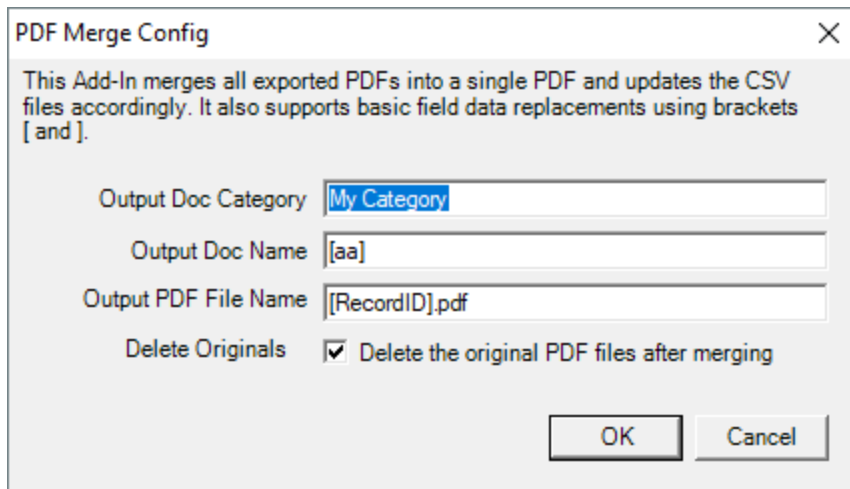
MINIMUM EXPORTER VERSION: 3.20.0001.0001

EVENT: RecordEnd

SYNOPSIS: Merges all exported PDFs for a given Record into one PDF

DESCRIPTION: PDF Merge is used to merge all PDFs from a Record into a single PDF.

CONFIGURATION: You need to specify the document category and name to merge as well as the name of the output PDF file.



The screenshot shows a dialog box titled "PDF Merge Config" with a close button (X) in the top right corner. Inside the dialog, there is a descriptive text block: "This Add-In merges all exported PDFs into a single PDF and updates the CSV files accordingly. It also supports basic field data replacements using brackets [and].". Below this text are three input fields: "Output Doc Category" with the value "My Category", "Output Doc Name" with the value "[aa]", and "Output PDF File Name" with the value "[RecordID].pdf". At the bottom left, there is a checkbox labeled "Delete Originals" which is checked, followed by the text "Delete the original PDF files after merging". At the bottom right, there are two buttons: "OK" and "Cancel".

Output Doc Category: The Category of the PDF documents to merge. Only those in the specified category will be merged. This field accepts variables.

Output Doc Name: The Name of the PDF documents to merge. Only those with the specified name will be merged. This field accepts variables.

Output PDF File Name: The name of the resulting merged PDF file. This must be the NAME only and not a path. This field accepts variables.

Delete Originals: Whether or not to delete the individual PDF files that were merged into the merged PDF.

PDF Portfolio

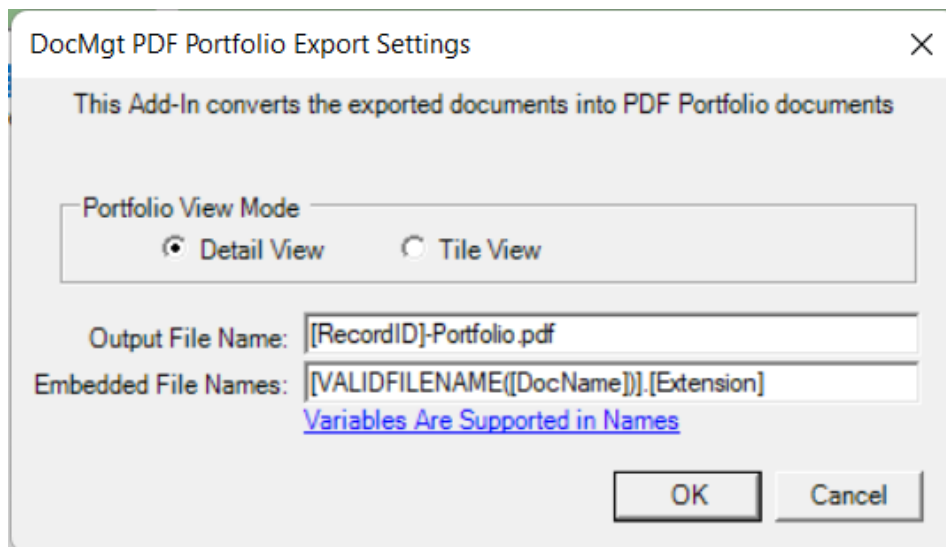
MINIMUM EXPORTER VERSION: 3.47.1000.0000

EVENT: RecordEnd

SYNOPSIS: Merges all exported documents into PDF Portfolios

DESCRIPTION: Merges all exported documents into a single PDF Portfolio document per Record

CONFIGURATION: You need to specify the view mode as well as the file names for the portfolio itself (PDF file) and the attachments



Portfolio View Mode: Detail mode shows a list of attachments with the details such as date and size. Tile mode shows thumbnails of the attachments with the file name only.

Output File Name: The Name of the PDF portfolio file

Embedded File Name: The Name of the attachments. Normally you need variables to keep the names unique.

Record Search

MINIMUM EXPORTER VERSION: 3.26.7024.17252

EVENTS: ProcessStart, RecordEnd

SYNOPSIS: Converts Exported data to JSON

DESCRIPTION: Searches for Records to export and updates them after export

CONFIGURATION: You need to specify the search criteria. In order to perform an (optional) update of the Records you need to specify the update values.

docMgt Record Search Settings

This Record Search Add-In is used to extend the way Exporter finds Records to export. Normally Records must be routed in order to be exported. With this Add-In Records can be searched for export.

Search | Update

Specify the special search to use for finding Records to export. These Records will be exported according to the Exporter settings. Be sure to use the Update tab to changes values so the Record does not get exported again!

	Variable	Value
▶	RecordType	Invoices
	Exported	#
*		

OK Cancel

docMgt Record Search Settings

✕

This Record Search Add-In is used to extend the way Exporter finds Records to export. Normally Records must be routed in order to be exported. With this Add-In Records can be searched for export.

Search

Update

Set values below that will be added/updated in the exported Records. This is useful to mark exported Records for future reference and to ensure they are not exported over and over again.

	Variable	Value
▶	Exported	[DATE]
*		

OK

Cancel

Exporter by itself will only export Records that have been routed to the user with which the Exporter is configured. This Add-In allows you to search for Records to export. Once they are exported you can then choose to update those Records. It is useful to look for a specific field value to trigger the export. Then, after export, change that value so the Record is not exported again. This allows you to control how and when the export occurs.

Variables are allowed in both the Search and the Update names and values.

RecordType Export

MINIMUM EXPORTER VERSION: 3.25.6948.28311

EVENT: ProcessStart

SYNOPSIS: Exports all records from a RecordType into a single CSV

DESCRIPTION: Exports all records from a RecordType into a single CSV.

CONFIGURATION: You need to specify the RecordType to export and the columns that you need created in the CSV. File name is optional.

docMgt Record Type Export Settings

This Add-In will extract all the data from the given Record Type and place it into a single CSV file for other systems to use. This is a great data sync tool for external vendors and more.

ID of Record Type to export

File name for CSV file

Columns to export. You can use variables in the value column.

	CSV Column Name	Data Value or Variable
	Type	Vendor File
	Vendor Name	[Vendor]
	Address	[Address]
▶▶		

OK Cancel

ID of Record Type: This is the ID number of the Record Type to export. Using IDs is safer because names can change but the ID will stay unchanged.

File Name: The name of the CSV file to export. If left blank a default name will be used which includes the Record Type ID.

Columns: The columns to product in the output CSV file. You can use static string values or Variables for any of the "Data Value or Variable" column values.

TIF to PDF

MINIMUM EXPORTER VERSION: 3.34.0001.0001

EVENT: RecordStart

SYNOPSIS: Converts TIF images in Record to PDF

DESCRIPTION: TIF to PDF converts individual TIF images that are in a Record to merged PDFs

CONFIGURATION: There is no configuration needed for this Add-In.

Older document management systems used to store documents as individual TIF files - one per page. After conversion to docMgt you can use this Add-In to merge those individual TIF pages into a single PDF file. Any TIF inside the same SubCategory (or Category if SubCategory is not used) will be merged together in order. The PDF that is created is named the same as the first TIF page was named. All TIFs merged this way are deleted BUT NOT PURGED. This means until you purge the TIFs they still count toward license limits.

ZIP Files

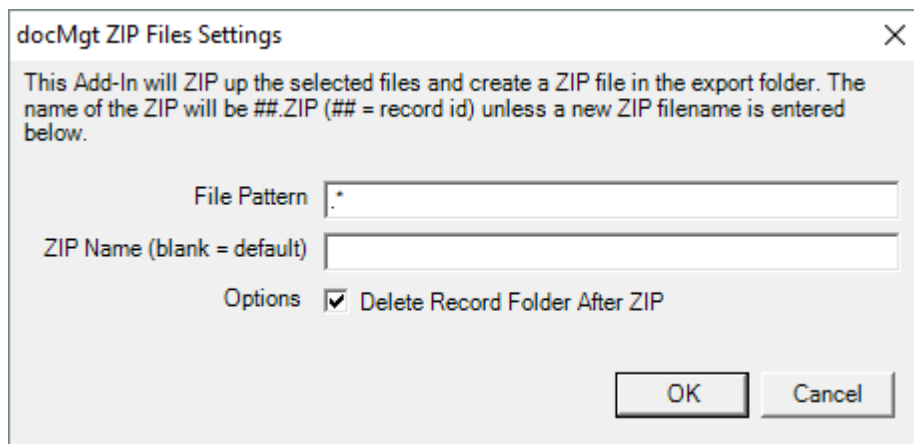
MINIMUM EXPORTER VERSION: 3.20.6775.18338

EVENT: RecordEnd

SYNOPSIS: Compresses the specified files into a ZIP file after each Record is exported.

DESCRIPTION: ZIP Files is designed to ZIP up files from an export into a single ZIP file per Record.

CONFIGURATION: You need to specify the pattern of the files to ZIP and optionally the ZIP file name and whether to delete the folder.



The dialog box is titled "docMgt ZIP Files Settings" and has a close button (X) in the top right corner. It contains a text area with the following text: "This Add-In will ZIP up the selected files and create a ZIP file in the export folder. The name of the ZIP will be ##.ZIP (## = record id) unless a new ZIP filename is entered below." Below this text are three input fields: "File Pattern" with a text box containing ".", "ZIP Name (blank = default)" with an empty text box, and "Options" with a checked checkbox labeled "Delete Record Folder After ZIP". At the bottom right are "OK" and "Cancel" buttons.

File Pattern: The pattern of the file names to ZIP. Use *.* for all files in the Record folder.

ZIP Name: The name of the ZIP file to create. Leave blank for the default of ###.ZIP where ### is the Record ID.

Delete Record Folder: If checked ON then the exported Record folder will be deleted after the files are ZIPPED..

