



DocMoto

Instructions on Apple Calendar integration:

Table of Contents

Introduction	3
Configuring the DocMoto system:.....	4
Importing Apple Calendar Components:.....	4
Fig. Apple Calendar Components – imported:.....	4
Adjusting the Apple Calendar script extension:	5
Fig. Opening the iCal script – in edit mode:	5
Fig. Editing the iCal script:	5
Fig. My Card:.....	6
Adjusting the Apple Calendar meta-data (tags):.....	6
Fig. Add new calendar alarm:	7
How the calendaring system works:.....	8
Setting Calendar Tags:.....	8
Fig. Added Calendar Tags to Contract Folder:	8
Fig. User Updating Calendar Tags:.....	9
The Results:.....	10
Fig. File Imported into DocMoto – Calendar Tags Set:.....	10
Fig. Calendar Updated By DocMoto:	11
Email Notification:	11

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:

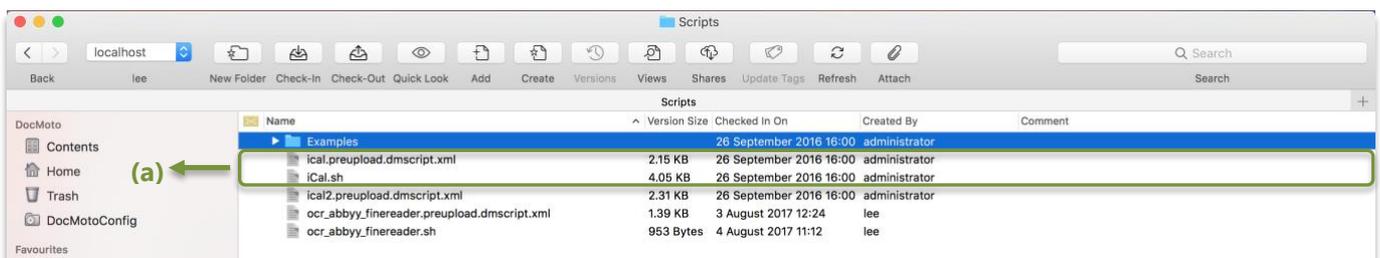
1. Pre-upload xml schema for Apple Calendar events.
 - a. The pre-upload xml schema for Apple Calendar events require no configuration.
2. Apple Calendar script extension.
 - a. The Apple Calendar extension needs to be configured for all DocMoto users who need the calendaring feature.
3. Apple Calendar 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:

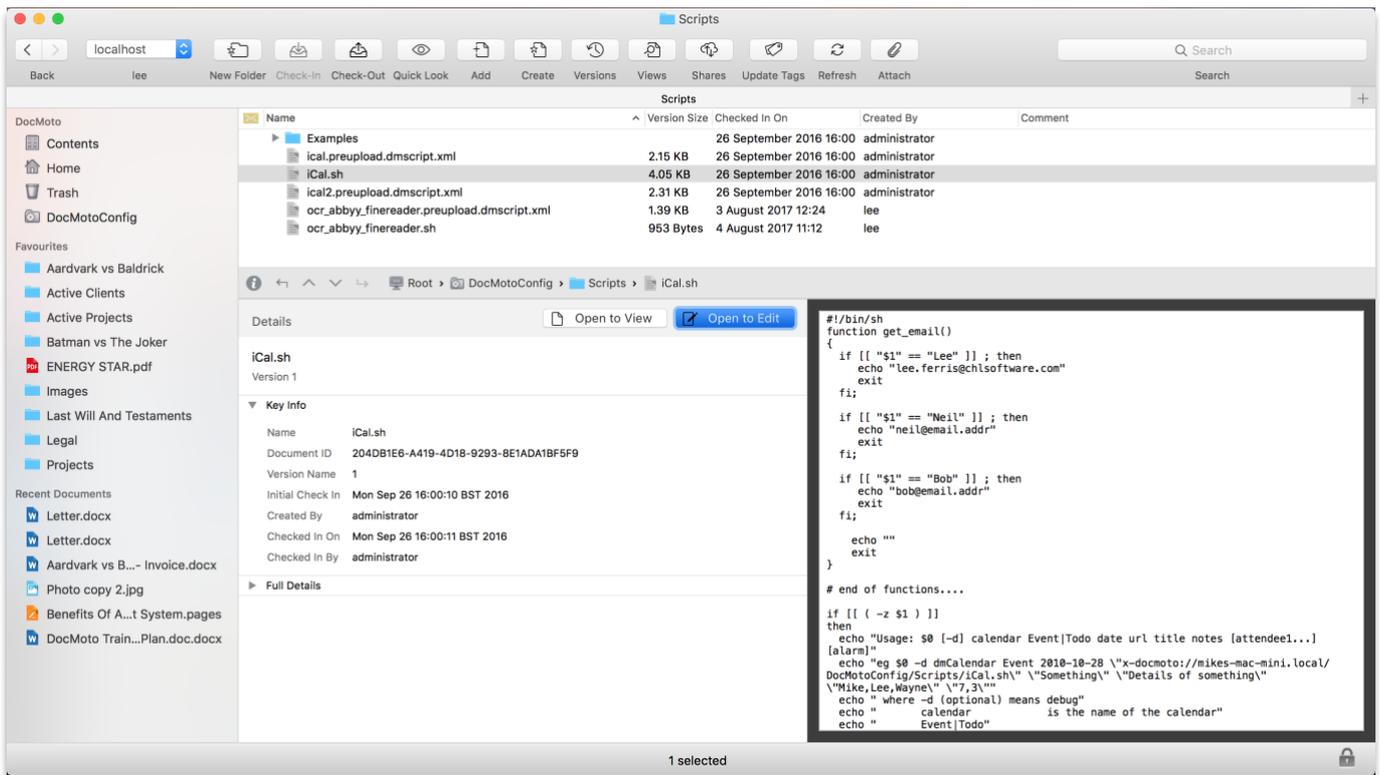


(a) Apple Calendar Components.

Adjusting the Apple Calendar script extension:

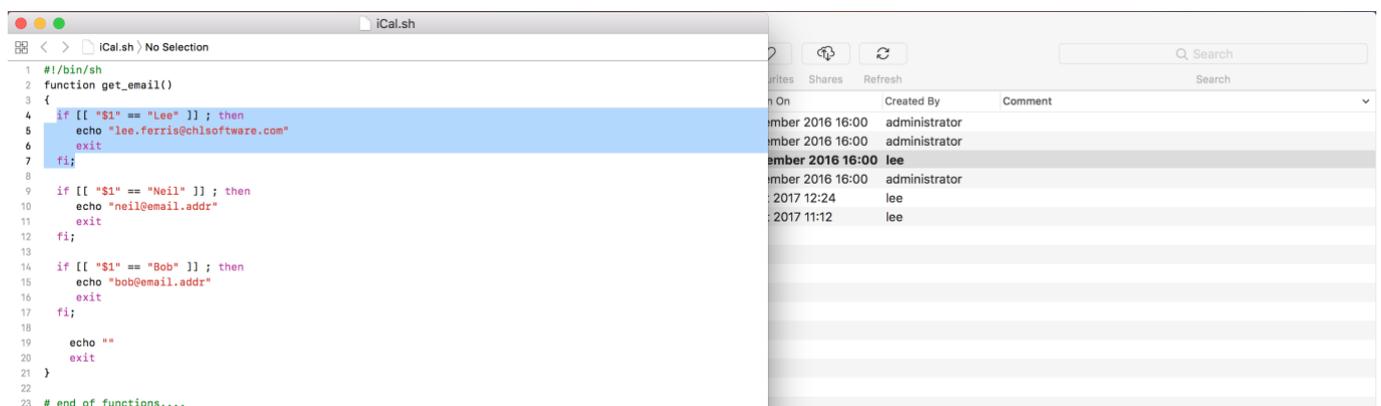
1. Select the **“Show Admin Folders”** option from the **“Admin”** menu. A hidden folder called **“DocMotoConfig”** will become available.
2. Within the **“DocMotoConfig”** folder, navigate to the **“Scripts”** folder. Double-click on the file **“iCal.sh”** file and select the **“Open to Edit”** option. 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:



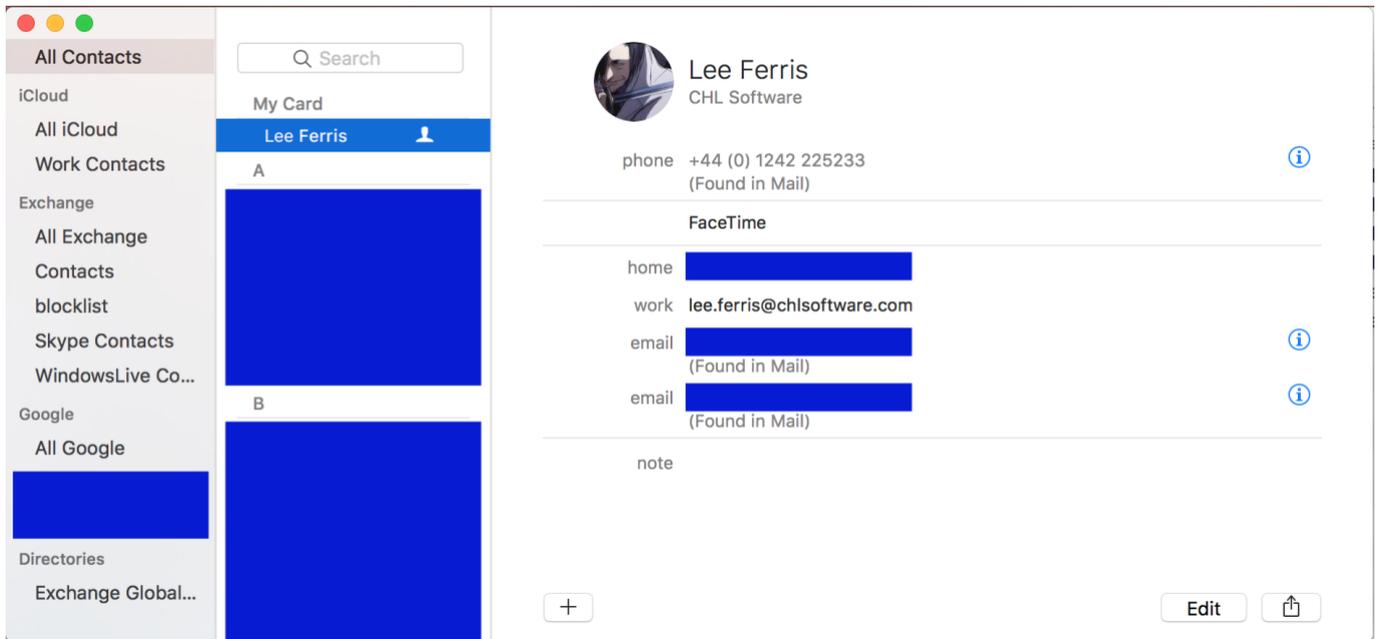
3. The file **“iCal.sh”** is presented to the administrator in an edit mode. Insert the names and email addresses of the users in the same format as the example within the file. As shown in **Fig. Editing the iCal script.**

Fig. Editing the iCal script:



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:



4. 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.

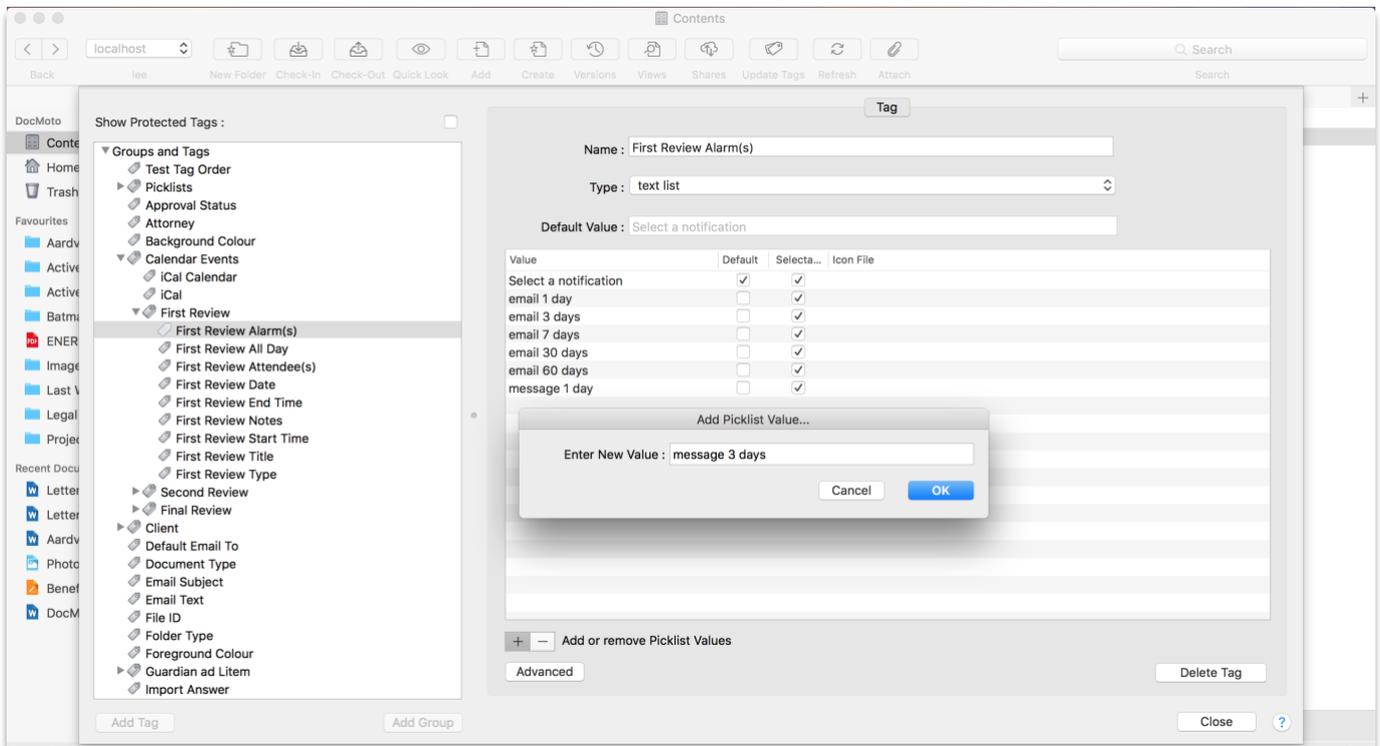
At this stage the administrator has configured the Apple Calendar script extension.

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](#).
5. 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:



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.
2. **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:

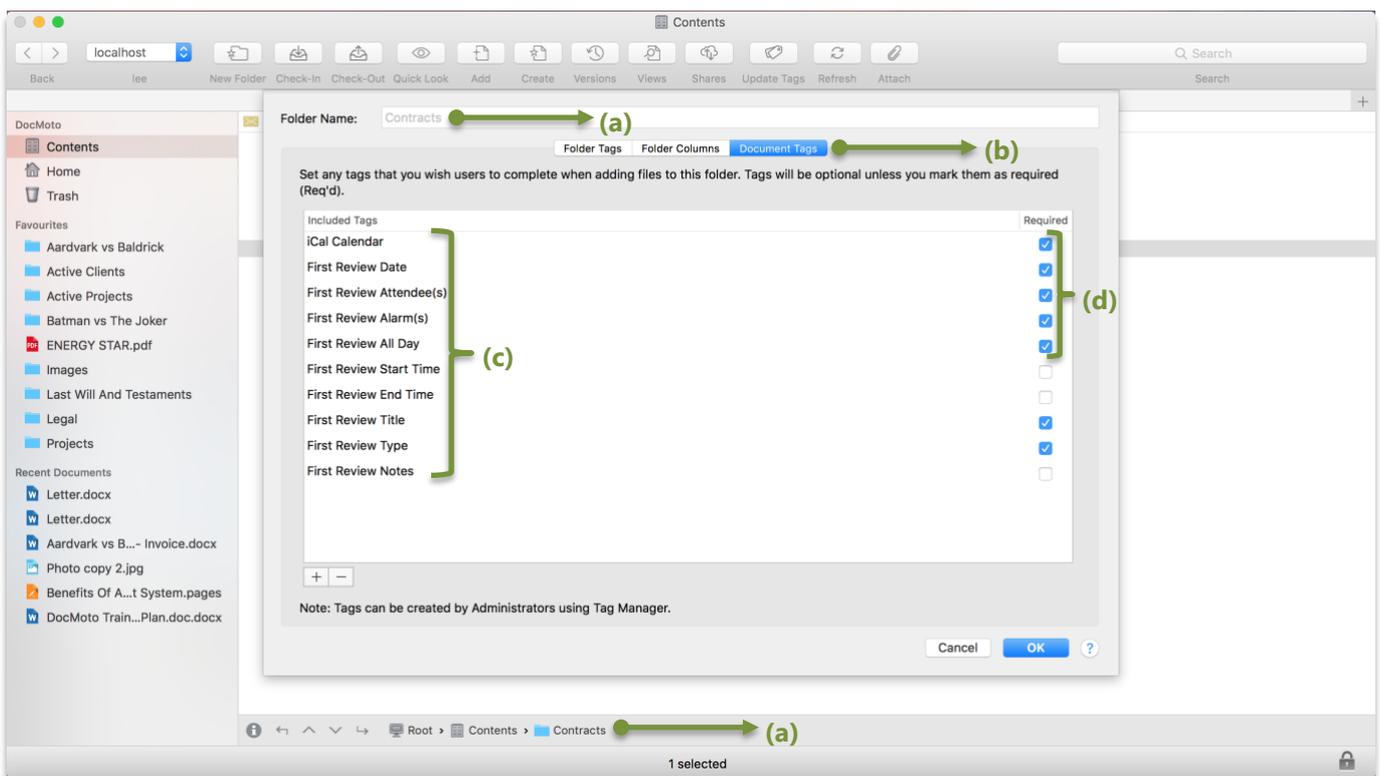
The administrator of the DocMoto system can apply rules in the form of document tags against any folder within the DocMoto system (including folders within folder templates). This will enable users to fill in “**Calendar Task**” tags and subsequently make an entry in to an Apple Calendar on confirmation. 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.
7. 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:

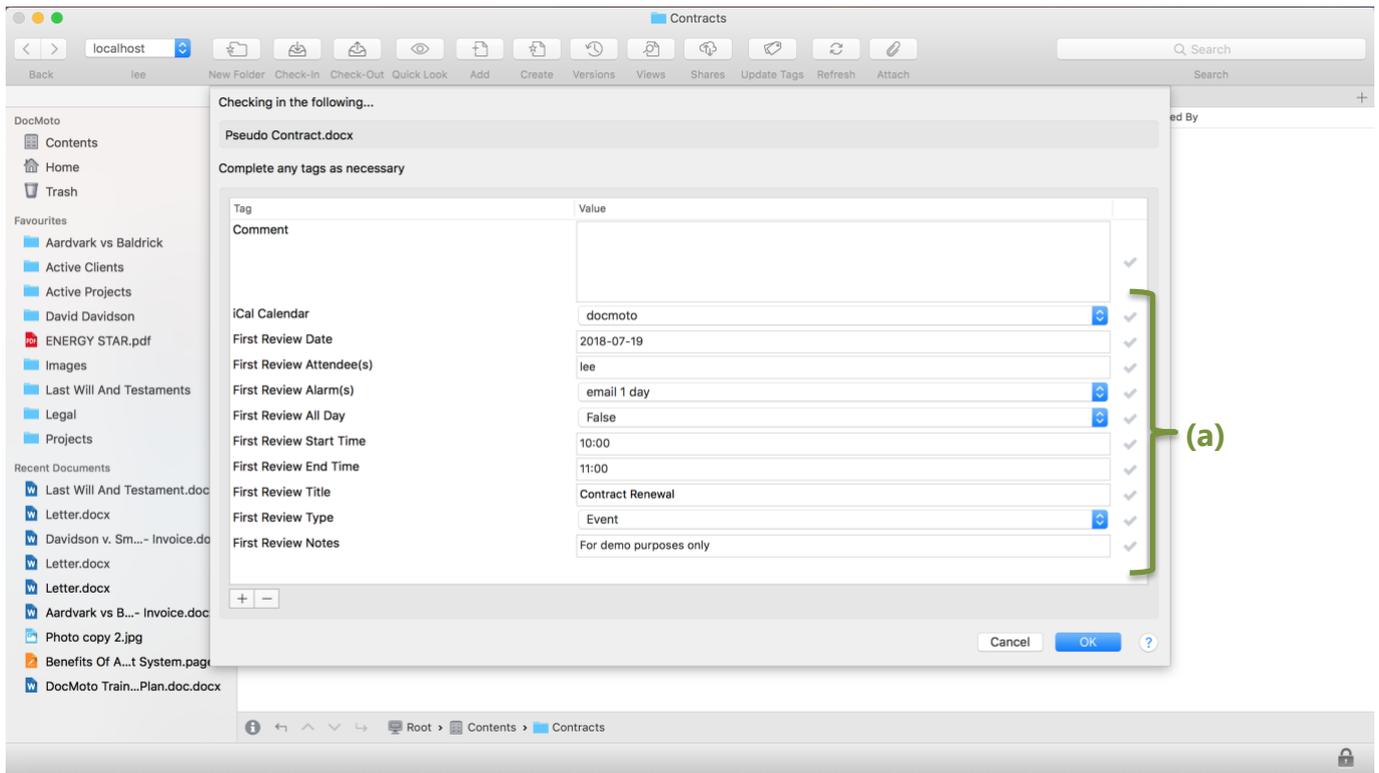


- (a) **Contracts** – folder within DocMoto where the calendar tags will be registered.
(b) **Document Tags** – tab for adding (or removing) tags.
(c) **Included Tags** – tags registered to Contracts folder.
(d) **Required** – check box to make tag(s) mandatory.

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**.

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:

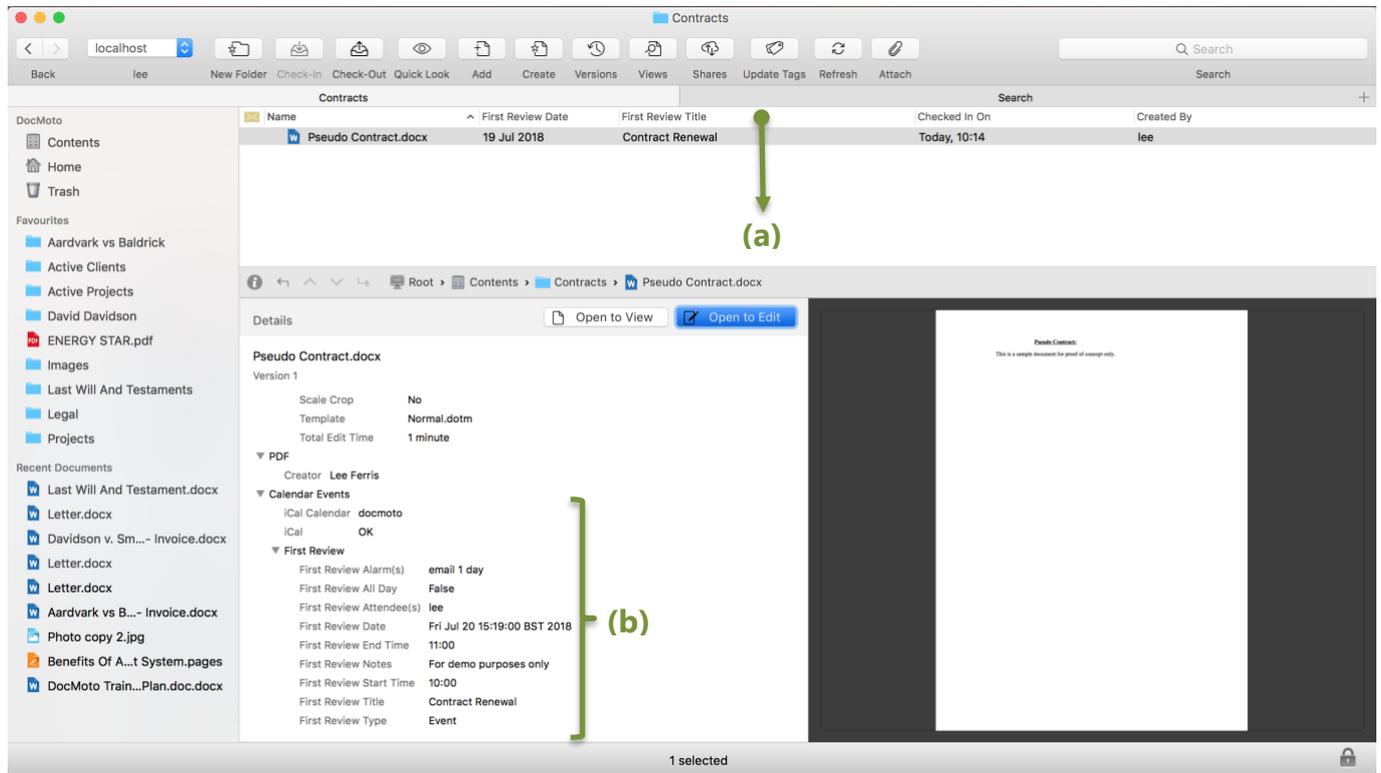
1. Import or create the file and add an entry to the users' Apple Calendar.
2. The attendee(s) added will be notified via the mechanism selected (i.e. email or message) at the appropriate moment.
3. An **“x-docmoto”** link will be inserted into:
 - a. The Apple Calendar item created.
 - b. The email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

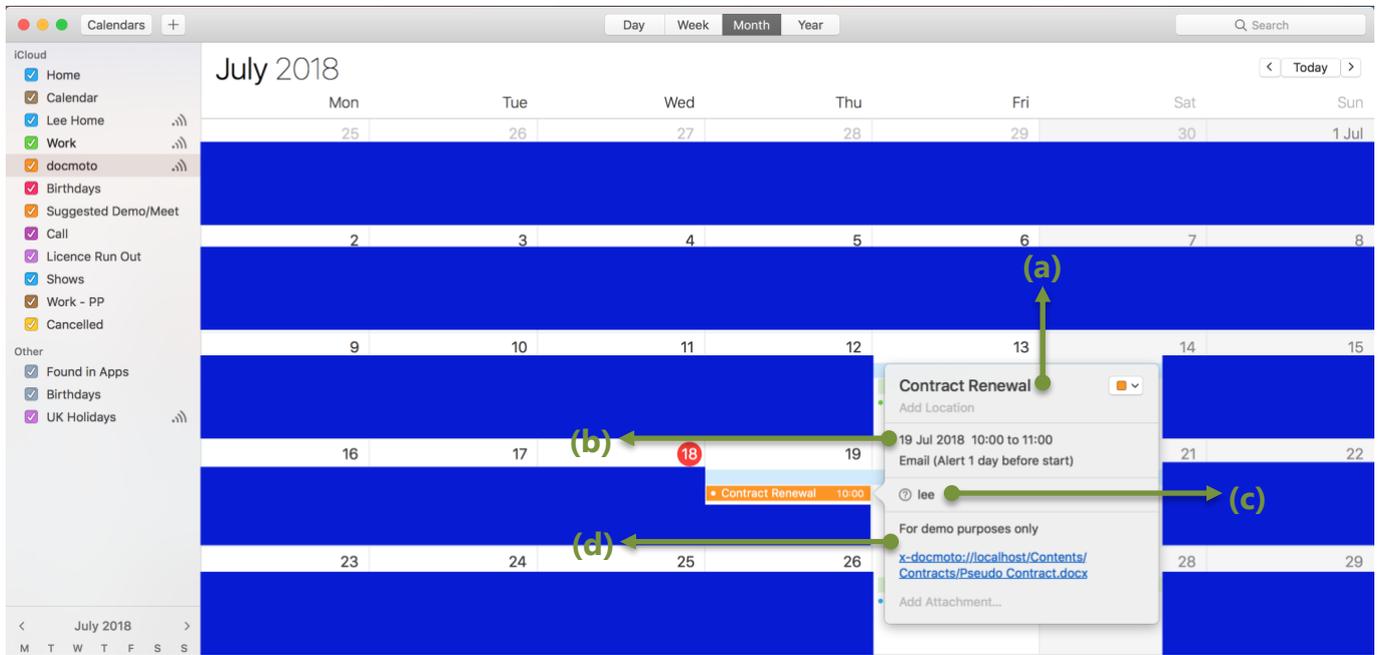


(a) **Column Headers** – configured to reflect:

- **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.

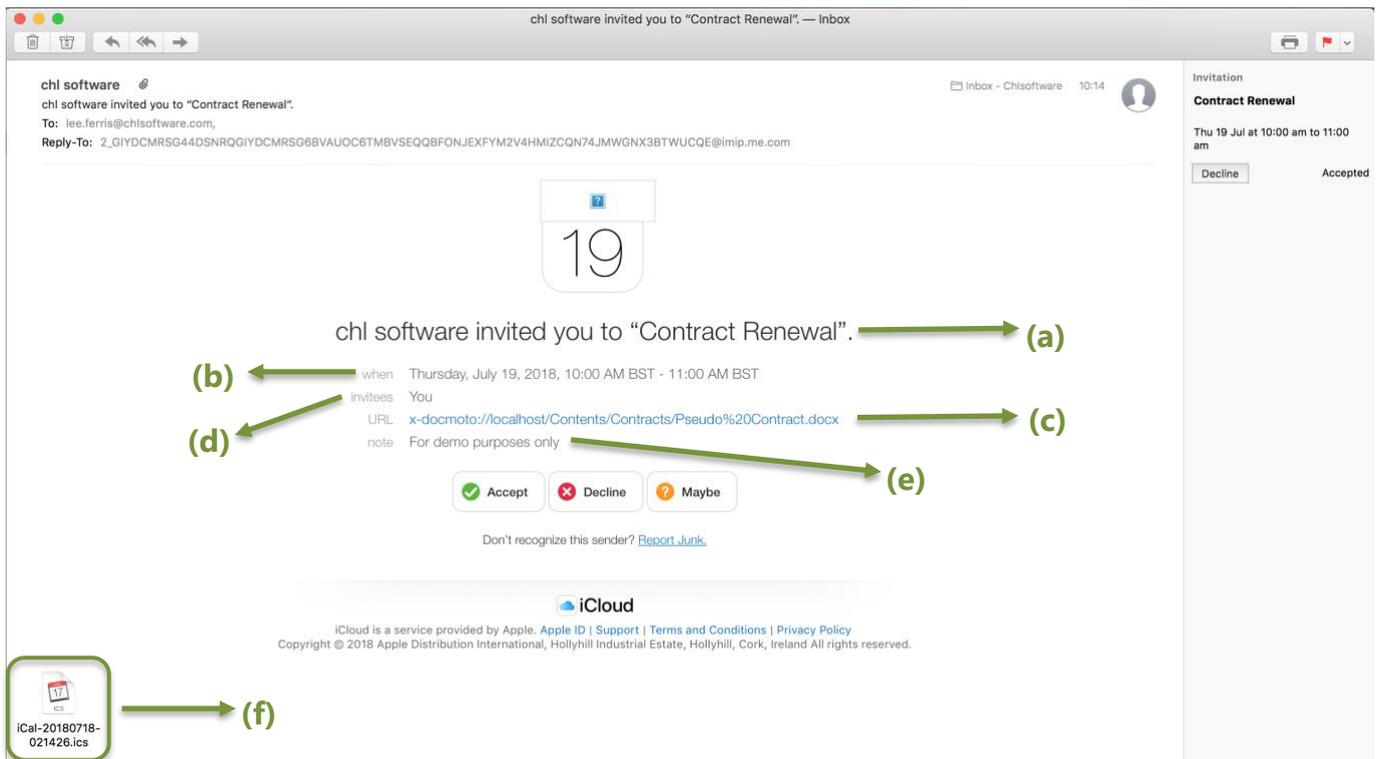
(b) **Calendar Events** – Groups & tags with values set.

Fig. Calendar Updated By DocMoto:



- (a) **First Review Title** – Example DocMoto Apple Calendar Integration.
- (b) **First Review Date & First Review Alarm** – 2nd 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:



- (a) **First Review Title** – Contract Renewal.
- (b) **First Review Date** – Thursday, July 19th, 2018, 10:00 AM BST – 11:00 AM BST.

- (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).