

## Support Bulletin # 114 ABM Doc Server Set Up

### Doc Server installation

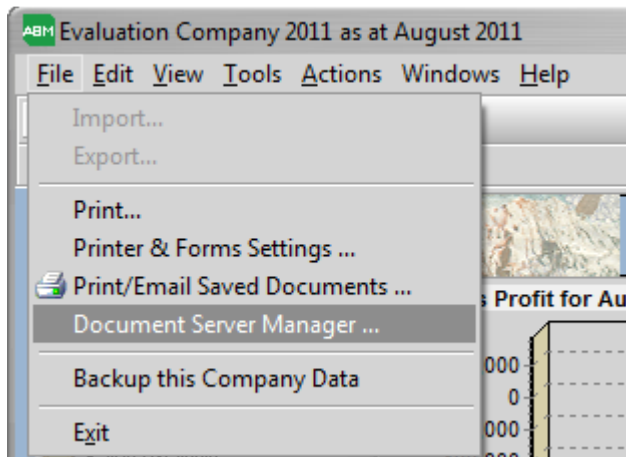
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### 1. Server Setup

#### OVERVIEW

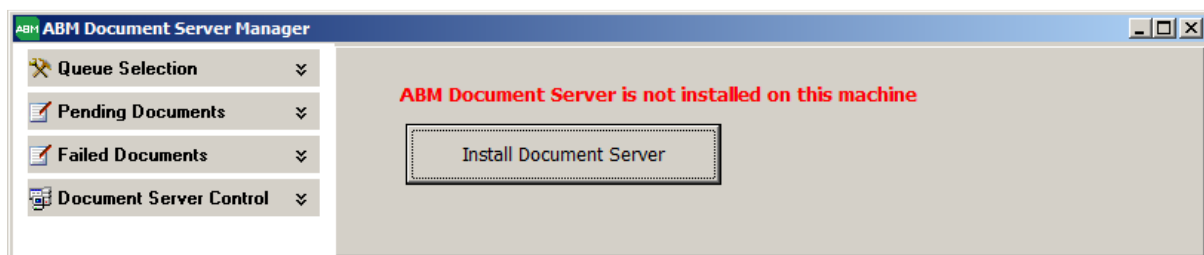
Doc Server is for use with ABM 7 onwards.

In ABM click File - Document Server Manager

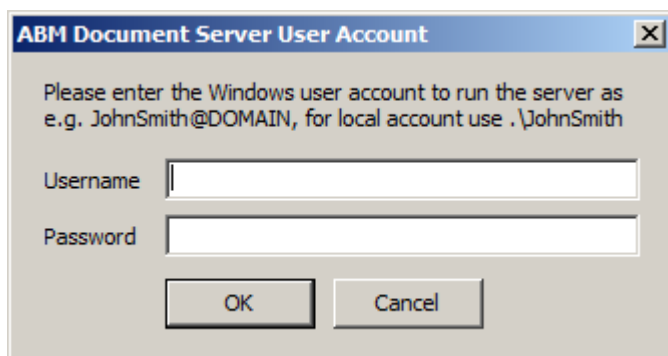


When it opens for the first time - you will see the following

Click "Install Document Server"



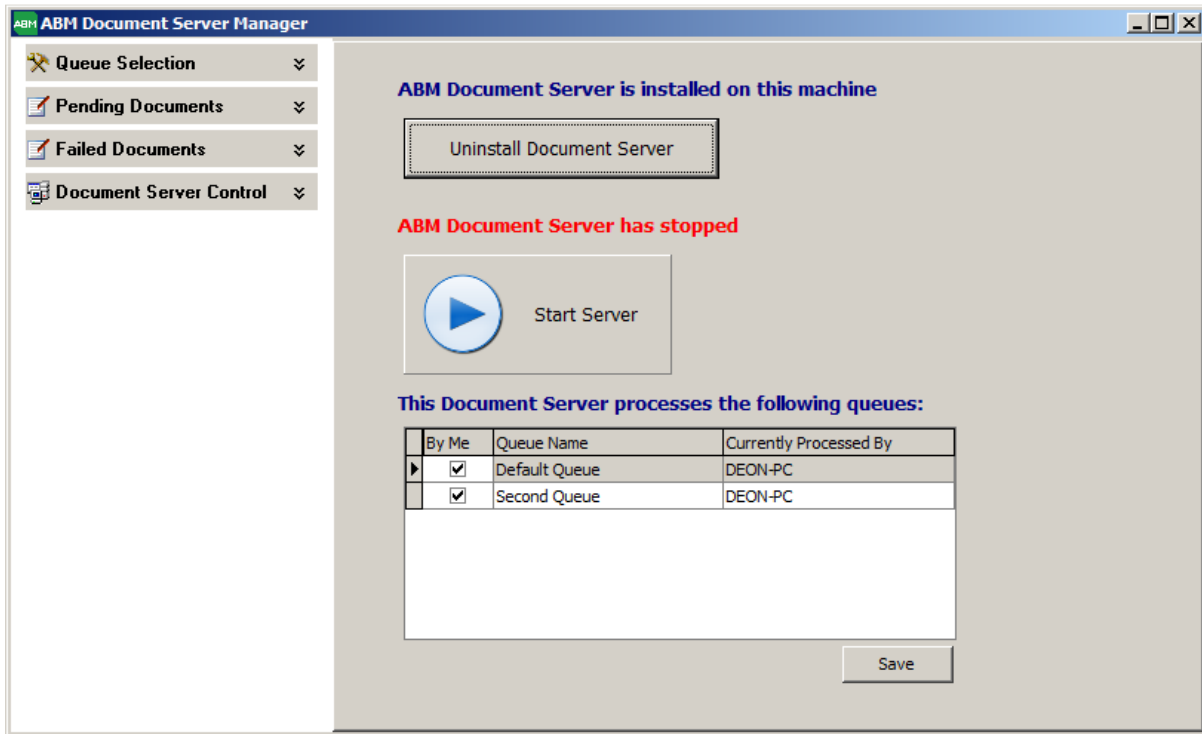
Type your Windows username and Password, in the form username@domain, and your password to run the service



OK

Now Doc Server is installed but the Service is not running yet

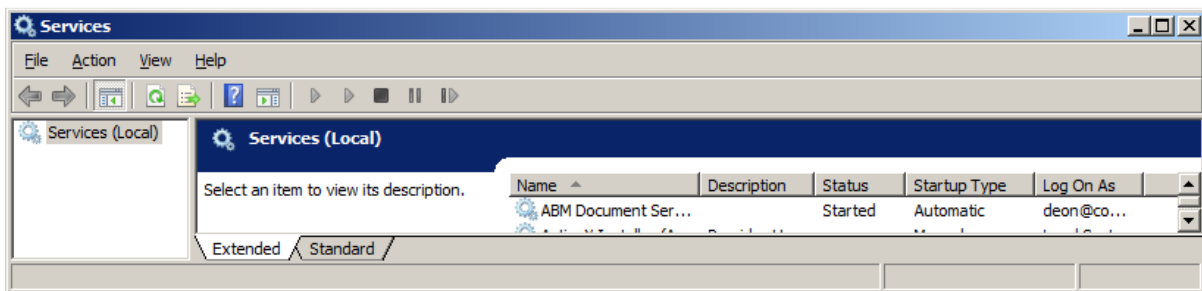
You can either go to Windows "services" and start the Docserver service or just do it from the Doc Server Interface "Start Server"



This may take a few seconds

In the Grid you will see the default queue, as well as any other queues you have created

The service is running



Before you "Start Server" the service will be listed but the status will be blank, and once started, this can be confirmed in the status

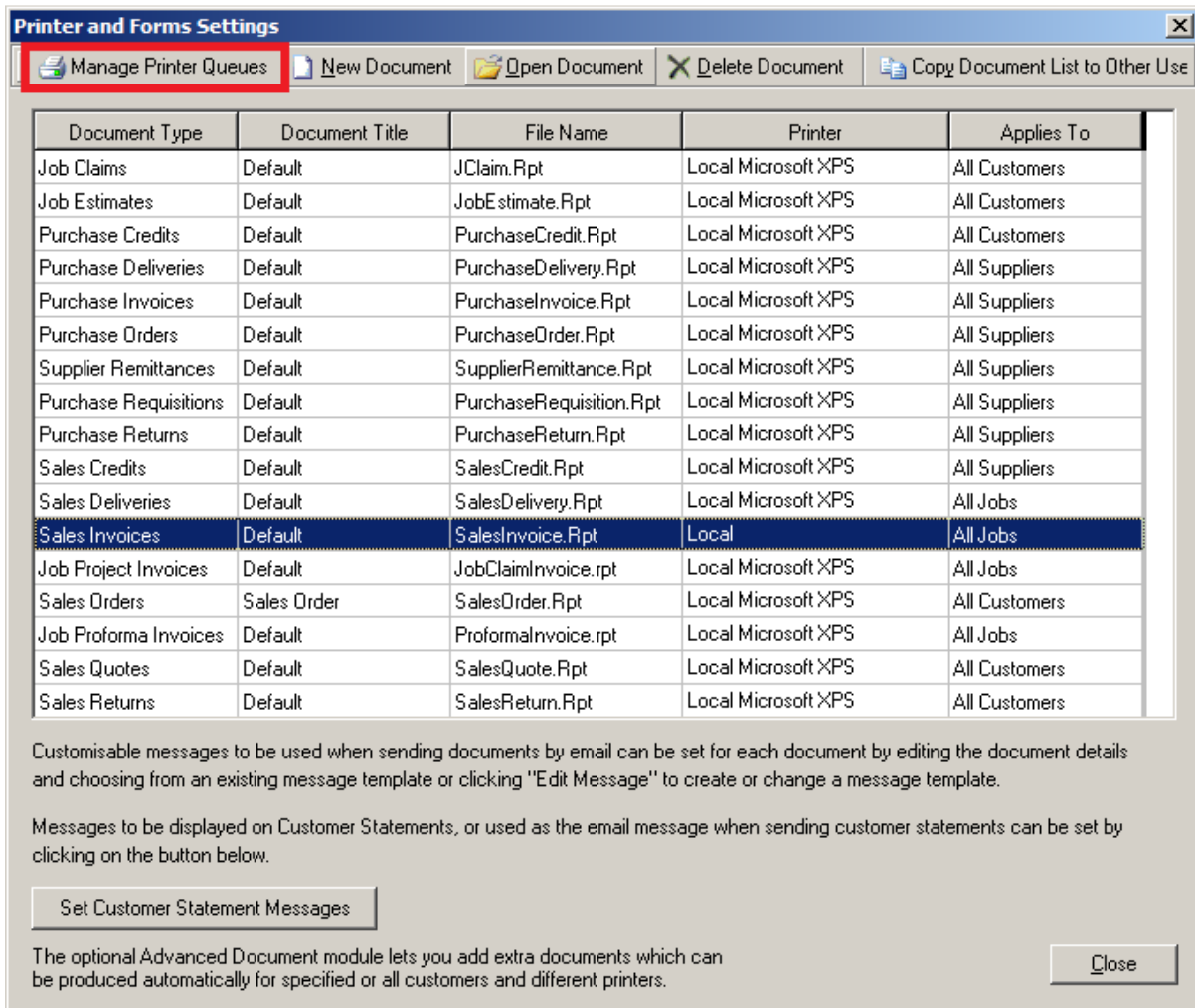
Generally this service will continue running all the time

Now go to the section on Queue Creation to continue the setup process

## 2. Queue Creation

Go to Printer and Form Settings

Click "Manage Printer Queues"



The "Printer and Forms Settings" dialog box features a menu bar with "Manage Printer Queues" (highlighted), "New Document", "Open Document", "Delete Document", and "Copy Document List to Other Use". Below the menu is a table with five columns: Document Type, Document Title, File Name, Printer, and Applies To. The table lists various document types such as Job Claims, Job Estimates, Purchase Credits, etc. The "Sales Invoices" row is highlighted. Below the table, there are instructions on setting email messages and a "Set Customer Statement Messages" button. A "Close" button is at the bottom right.

Document Type	Document Title	File Name	Printer	Applies To
Job Claims	Default	JClaim.Rpt	Local Microsoft XPS	All Customers
Job Estimates	Default	JobEstimate.Rpt	Local Microsoft XPS	All Customers
Purchase Credits	Default	PurchaseCredit.Rpt	Local Microsoft XPS	All Customers
Purchase Deliveries	Default	PurchaseDelivery.Rpt	Local Microsoft XPS	All Suppliers
Purchase Invoices	Default	PurchaseInvoice.Rpt	Local Microsoft XPS	All Suppliers
Purchase Orders	Default	PurchaseOrder.Rpt	Local Microsoft XPS	All Suppliers
Supplier Remittances	Default	SupplierRemittance.Rpt	Local Microsoft XPS	All Suppliers
Purchase Requisitions	Default	PurchaseRequisition.Rpt	Local Microsoft XPS	All Suppliers
Purchase Returns	Default	PurchaseReturn.Rpt	Local Microsoft XPS	All Suppliers
Sales Credits	Default	SalesCredit.Rpt	Local Microsoft XPS	All Suppliers
Sales Deliveries	Default	SalesDelivery.Rpt	Local Microsoft XPS	All Jobs
<b>Sales Invoices</b>	<b>Default</b>	<b>SalesInvoice.Rpt</b>	<b>Local</b>	<b>All Jobs</b>
Job Project Invoices	Default	JobClaimInvoice.rpt	Local Microsoft XPS	All Jobs
Sales Orders	Sales Order	SalesOrder.Rpt	Local Microsoft XPS	All Customers
Job Proforma Invoices	Default	ProformaInvoice.rpt	Local Microsoft XPS	All Jobs
Sales Quotes	Default	SalesQuote.Rpt	Local Microsoft XPS	All Customers
Sales Returns	Default	SalesReturn.Rpt	Local Microsoft XPS	All Customers

Customisable messages to be used when sending documents by email can be set for each document by editing the document details and choosing from an existing message template or clicking "Edit Message" to create or change a message template.

Messages to be displayed on Customer Statements, or used as the email message when sending customer statements can be set by clicking on the button below.

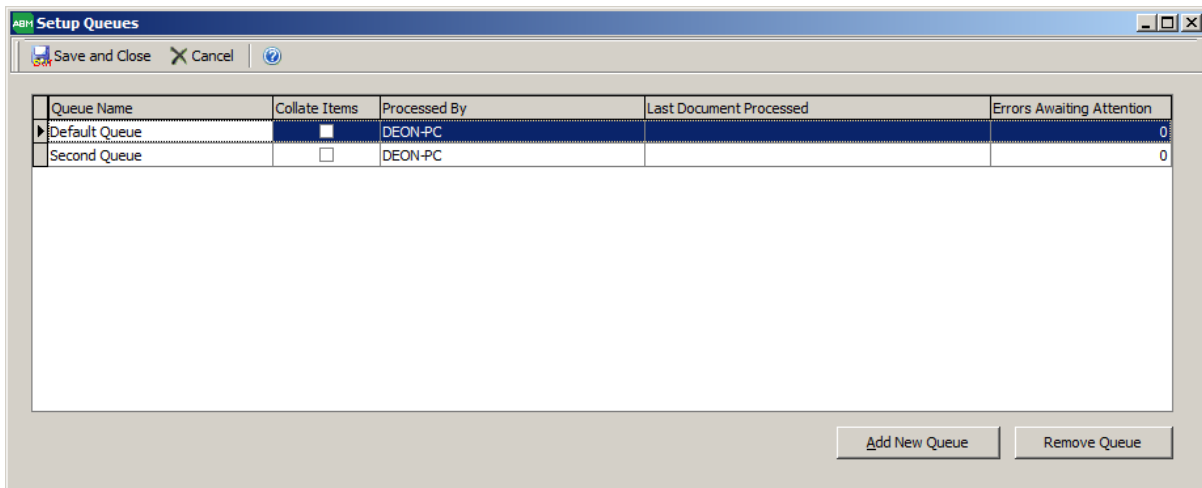
[Set Customer Statement Messages](#)

The optional Advanced Document module lets you add extra documents which can be produced automatically for specified or all customers and different printers.

[Close](#)

Any Queues already setup will show as follows

On a first install there will be a "Default Queue"



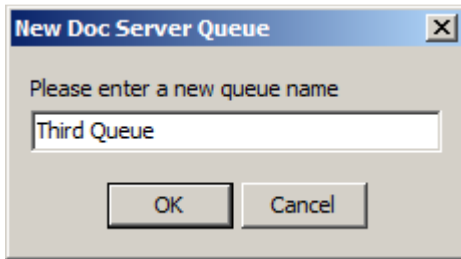
The "Setup Queues" dialog box has a menu bar with "Save and Close", "Cancel", and a help icon. Below is a table with five columns: Queue Name, Collate Items, Processed By, Last Document Processed, and Errors Awaiting Attention. It lists "Default Queue" and "Second Queue". At the bottom are "Add New Queue" and "Remove Queue" buttons.

Queue Name	Collate Items	Processed By	Last Document Processed	Errors Awaiting Attention
▶ Default Queue	<input checked="" type="checkbox"/>	DEON-PC		0
Second Queue	<input type="checkbox"/>	DEON-PC		0

[Add New Queue](#) [Remove Queue](#)

Click "Add New Queue"

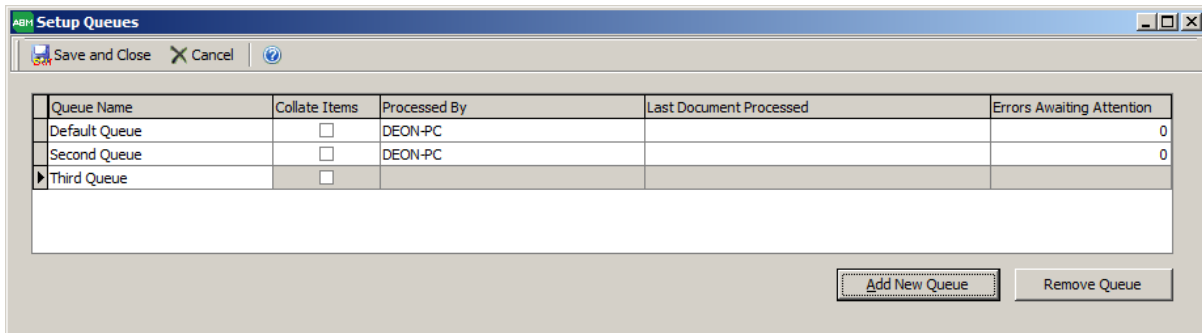
Enter the name of the Queue



OK

Save and Close

Note that the queue has been created but is not being processed by any machine as yet (as opposed to the first two queues which are being processed by "DEON-PC")

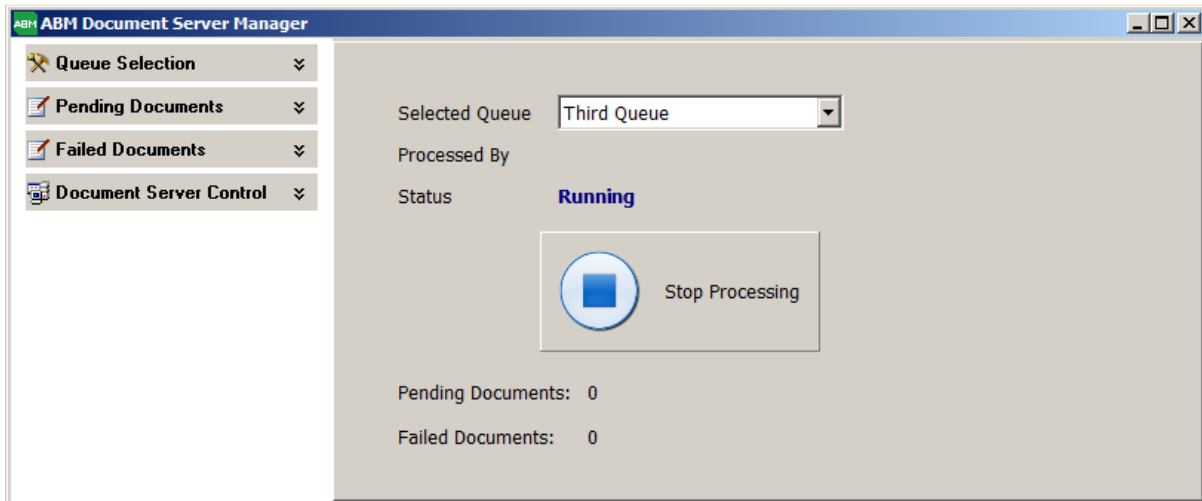


Now Go to Doc Server (Actions Menu)

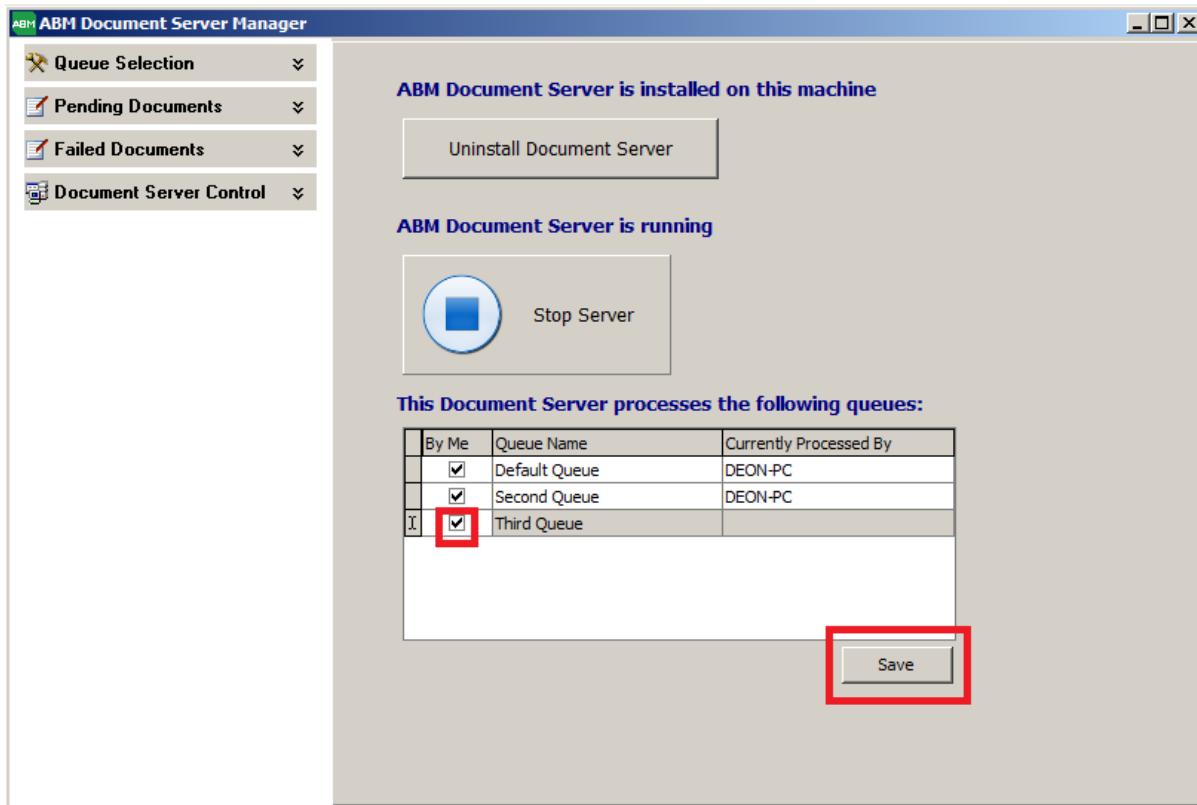
Go to the "Queue Selection" tab

Select the Queue you have just created from the dropdown

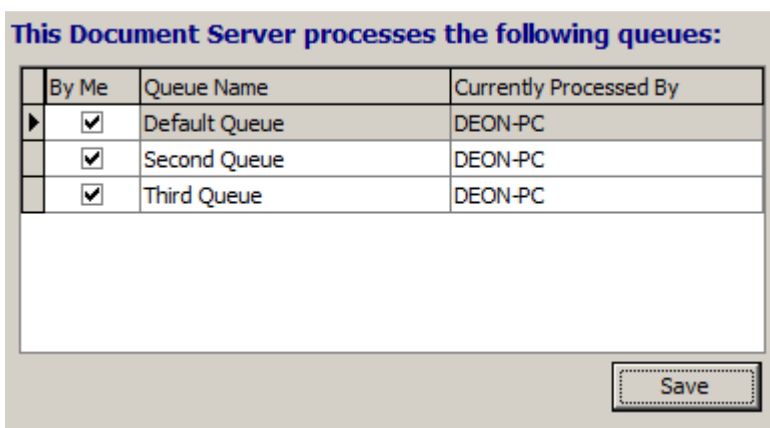
Click "Start Processing". This activates the third queue to be processed - but we still need to set who is to process this queue - or else anything sent to this queue will be ignored



Now go to the "Document server Control" tab



Tick the queue which indicates that this machine will process the queue



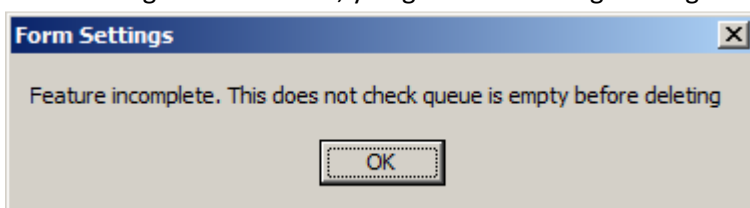
Click Save

The Grid will refresh to show that you are processing this queue

Deleting a queue. In Formsettings - Manage Printer Queues , Click on the queue to delete and then "Remove queue"

Yes

After clicking Save and close, you get the following message. Any documents waiting to be processed will be lost



Now Forms or reports can be sent to any newly created Queues

### 3. Workstation setup

As long as the files are placed in the ABM Accounts\Programs folder on the server then ABM will take care of copying these files to the workstation automatically.

The Workstation does not need to setup anything more.

Whatever form and Report settings there are and whichever queues they are set to print to will remain like that for all users. The setup is global.

At this stage it may be possible for any user to change the setup of queues - this may be a security option in future.

No manual file movement needed

The Workstation can setup its own queues. This is independent of the "service", in other words a queue can be setup by anyone, but the server processes the queues that have been ticked

All queues can be seen and selected on any machine, irrespective of where they were setup

### 4. Doc Server Control

The Document Server control screen has the following functions

Installing and uninstalling DocServer

Generally this will not be used again after initial setup

Starting and stopping the Service

The service can be stopped and started if required - possibly due to changes in email or fax servers

Tick the queues that this Doc Server processes

Save the grid

Note - there is no confirmation and no information.

You simply click the save button after ticking the queues

If you do not do this then the next time you start ABM you will need to tick the queues again

With a long list of queues, the grid should get a scrollbar

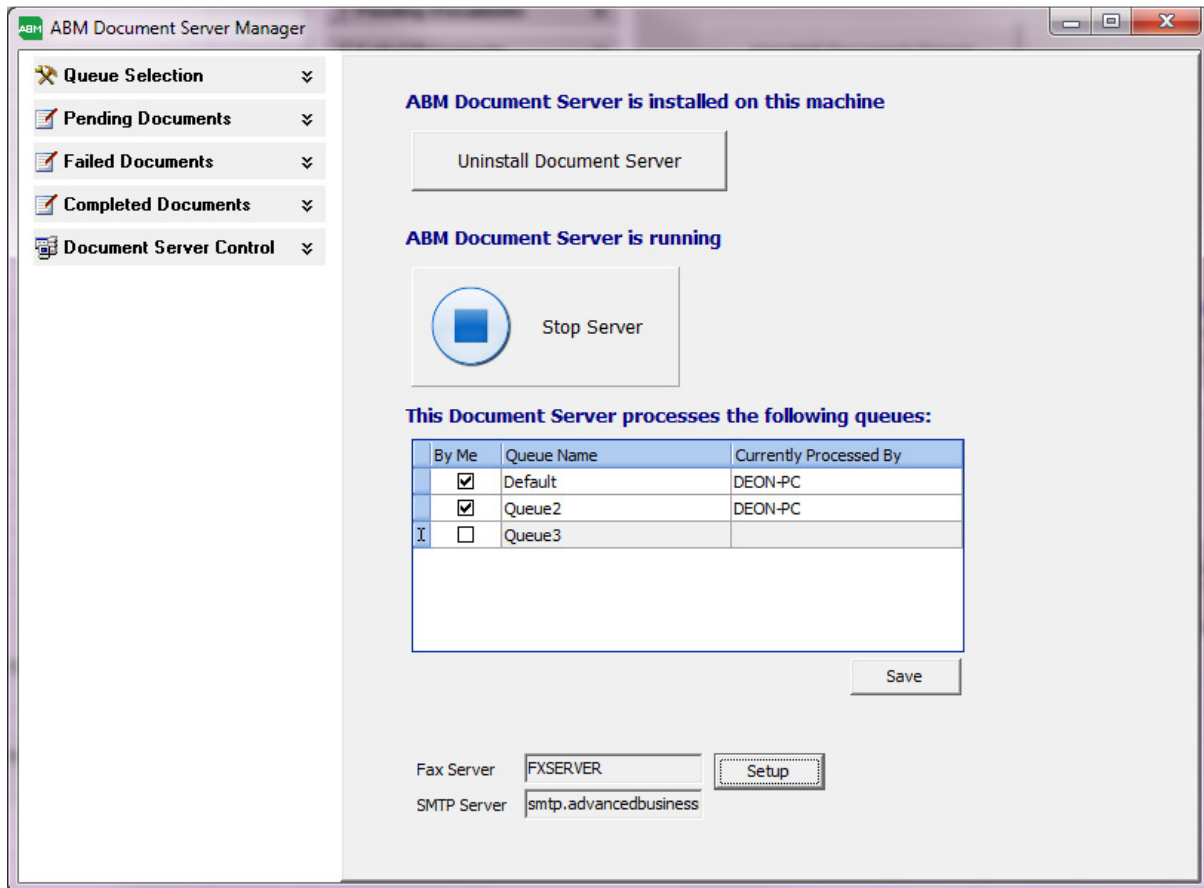
With Multiple Servers setup with each processing queues, this will be indicated here

Note : Each Doc Server can process multiple queues.

A queue is processed by only 1 Doc Server

The current FaxServer and SMTP Server will be indicated here. Blank if nothing set

Go to the section on Fax and email for more information on setup



## 5. Queue Selection

Queues can be processed by different machines. Depending on how forms are setup and what printers they are set to print to it could be set that different queues print to different printers, or not.

Select the Queue

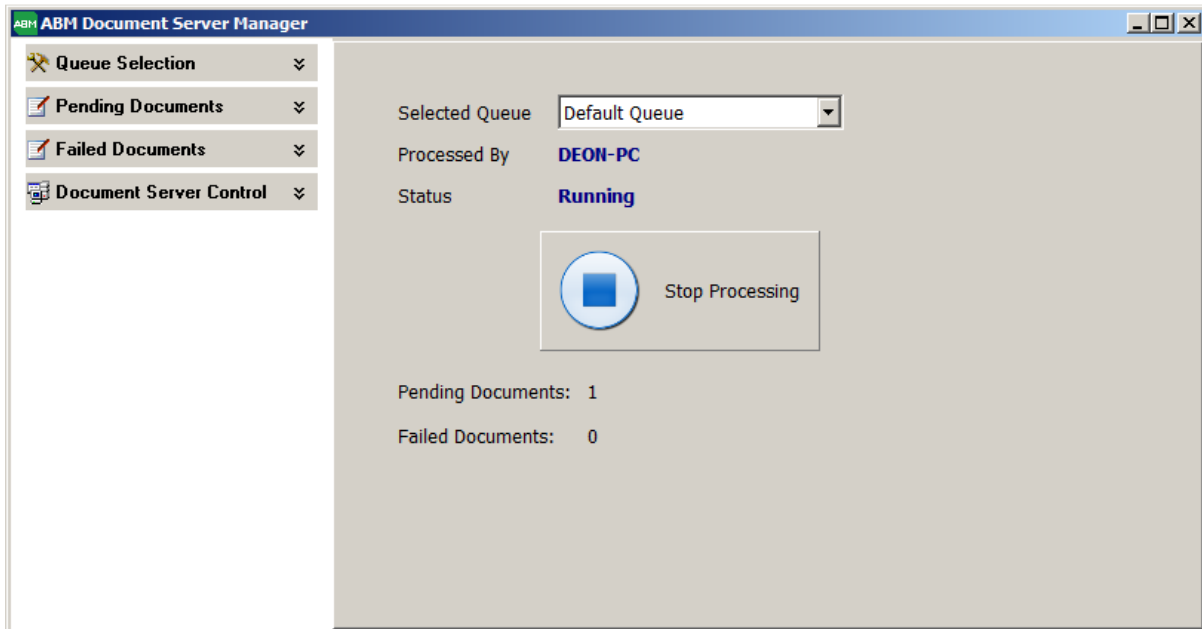
Indicated being Processed by which machine

What the status of the Queue is. Irrespective of the fact that the Docserver service is running, queues can be stopped and started as required

There is an indication of how many pending documents and how many failed Documents

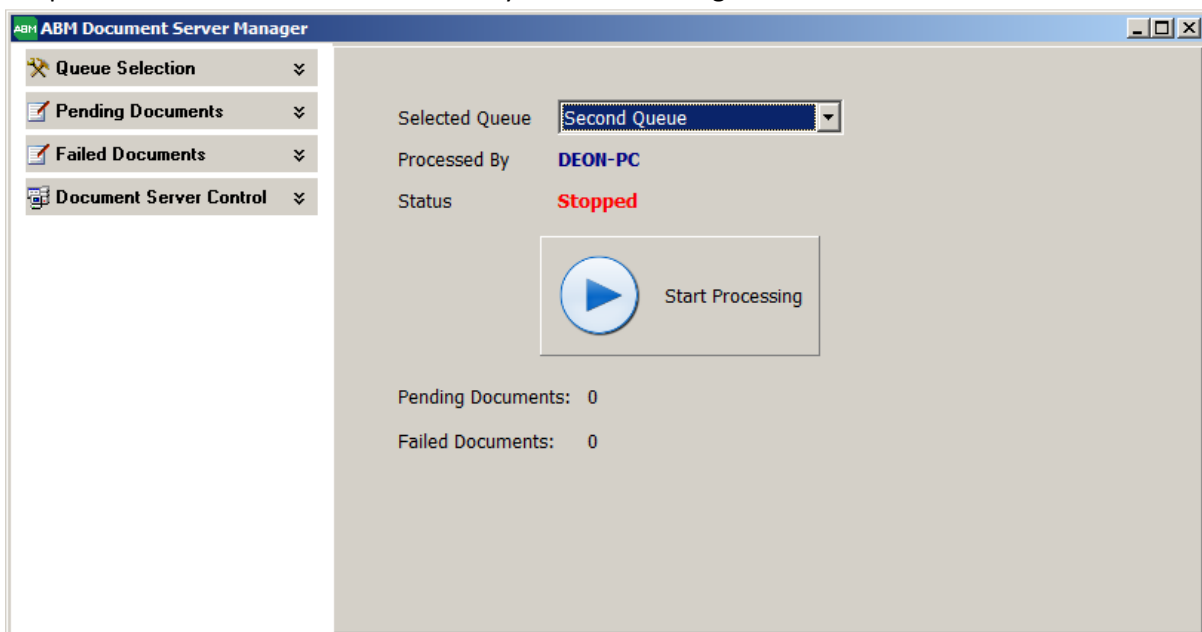
Default Queue (which is just a name - you create any names you choose) is currently active and indicates 1 document pending and zero failed



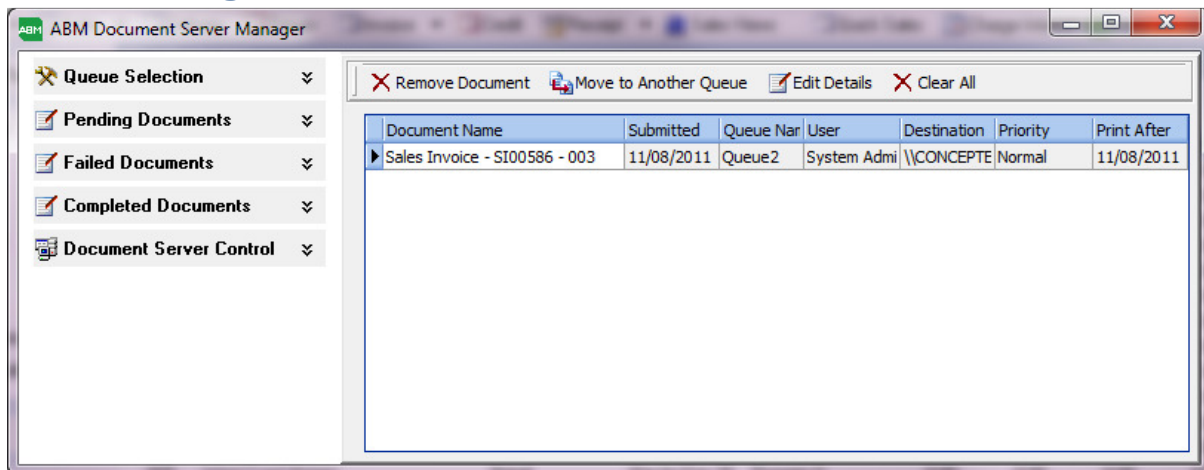


Starting and stopping a queue does not affect jobs that have been sent to the queue  
Stopping and restarting the service will not affect documents waiting in queues.  
It may be necessary to stop and start the service if certain settings have changed

Selection for 2nd Queue indicating it is currently Stopped. Documents sent to the 2nd Queue will be queued but not processed till the Queue is activated by "Start Processing"



## 6. Pending Documents



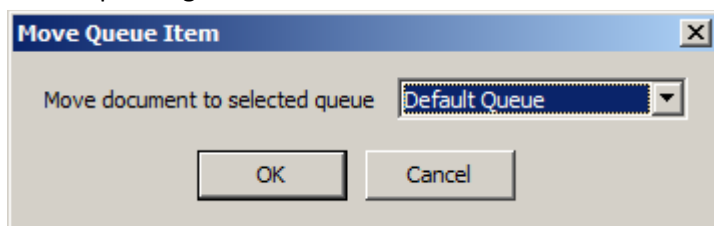
All documents that are to be printed / emailed will first go to pending.

If they are set to be processed before or at the current date and time, then they will move to the Completed Documents

If the date and time has not been reached yet, then the documents will remain in pending.

If the server is stopped, then any documents will remain in pending and some may be processed when the server is started again if the date and time of the document has been reached

Move a pending document to a different Queue



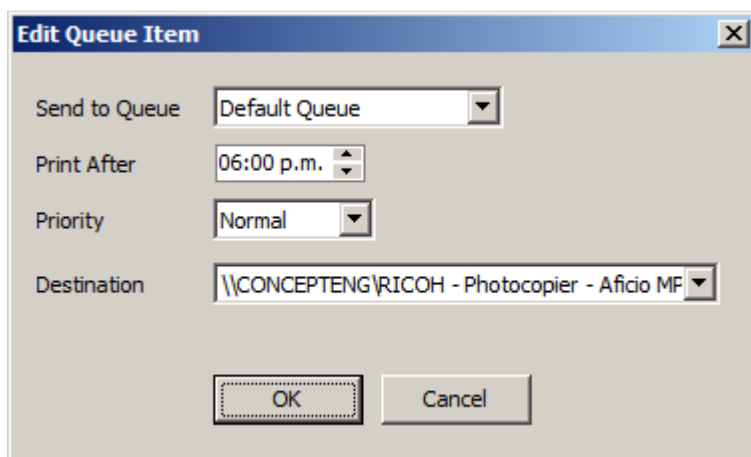
Move to a different Queue

Change the time

Change am/pm

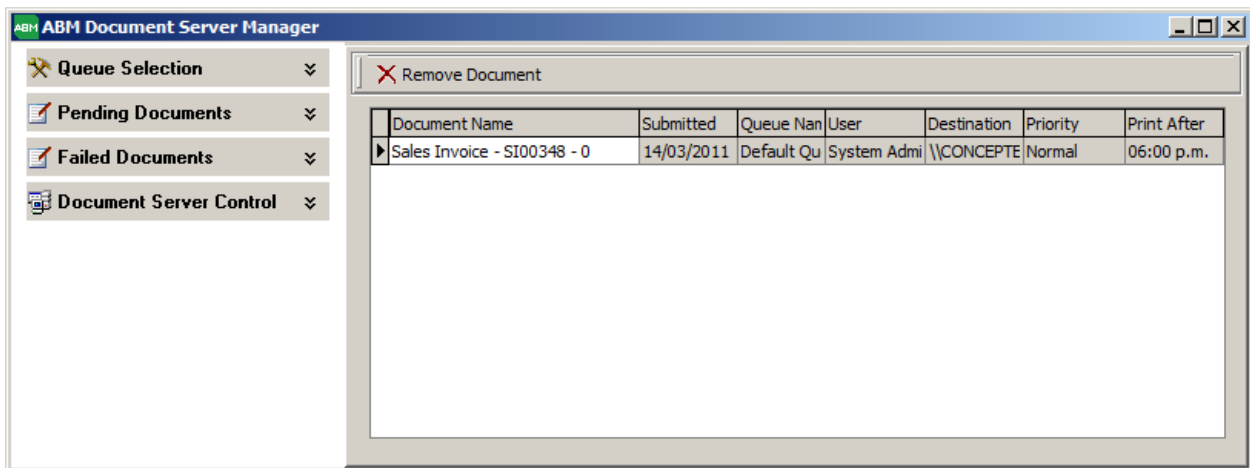
Change Priority

Change the printer



You can also delete that document from the queue

## 7. Failed Docs



The intention here is only to show you which documents may not have processed fully  
You can then click the button to clear this grid and remove the document from the Grid / Queue

NOTE : at this stage the failed document list needs more definition on what counts as a failed document and under what conditions a document will "fail"

If a document server was turned off at the time a document was queued to be printed, then this isn't a fail. The idea of docserver is that it would be running on a machine that would normally be left on all of the time (ie a server). When the machine is started back up, it should begin processing the queue again normally. The document shouldn't however be listed in both the failed documents and pending documents list.

The other thing that will cause a failed document is if you set up the form/report to print to a local printer that the document server doesn't know about or has a different name for. In the future if we can display a remote printer selection dialog, rather than a local printer selection dialog, that would help, if possible.

## 8. Forms

File - Printer and Form Settings

Open a Form

**Document Maintenance**

Document Name:

Type of Document:

Produce for:

Include:

Exclude:

File Name:

Send document to:

If printed, send to:  No. of Copies:

If emailed, use message:

The forms selected for individual workstations can be changed by using the Forms Settings menus in the transaction programs

Include Attachment(s):

FileName	Incl. on Ema	Incl. on Print	Incl. on Fax
<No data to display>			

**Send to Queue**  **Print After**  **Priority**

Select the Queue, time and Priority

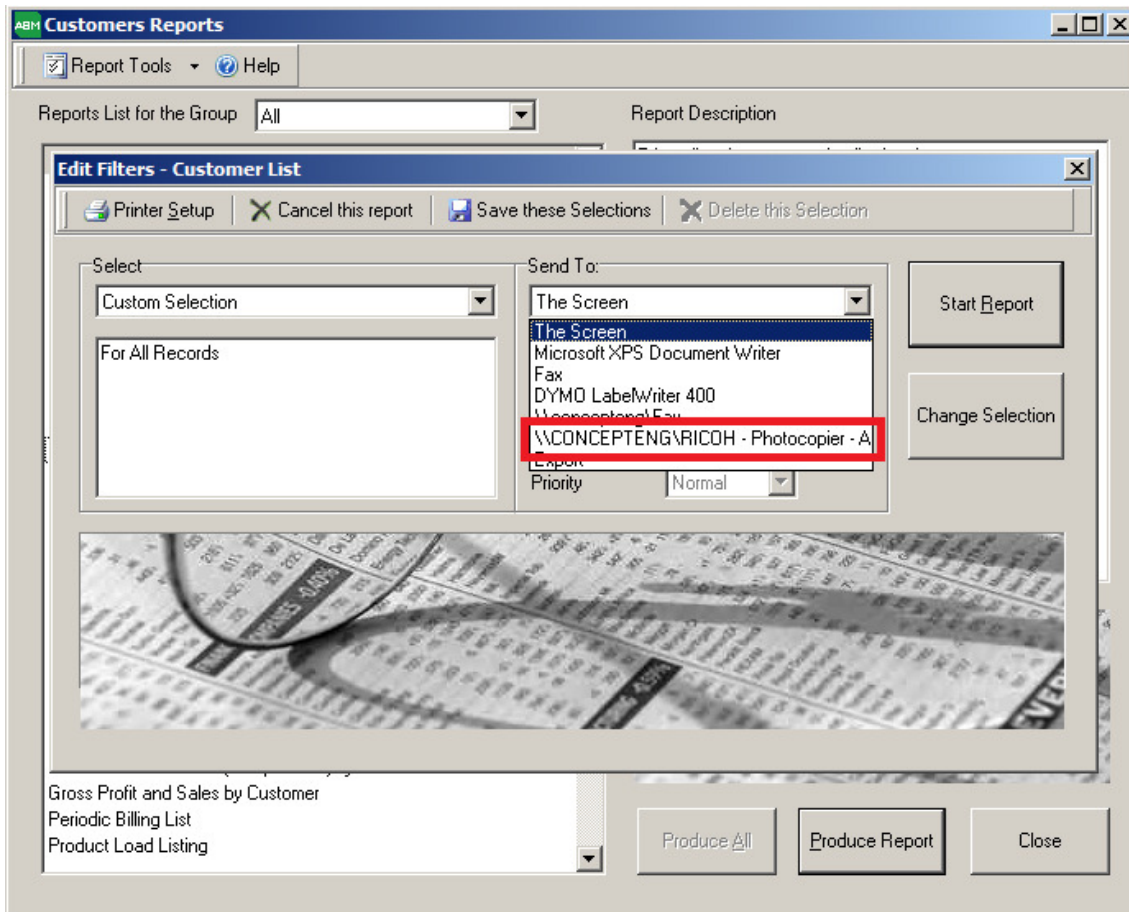
Select the printer, but it must be a physical printer. Do not select XPS Document writer for instance

Any forms NOT being sent to a queue will be printed by the normal Advanced Document handling, and not Docserver.

## 9. Reports

Select a Printer for the Report

If you select "Screen" - then you wont be able to change the settings for Queue, Time and Priority

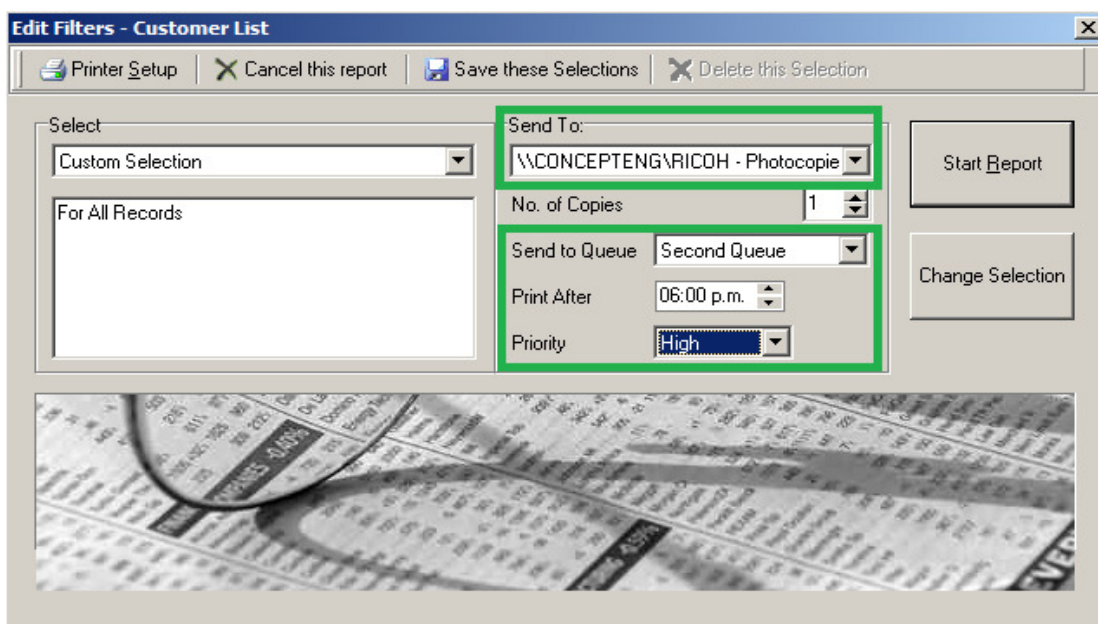


If you select "Screen" - it would not get printed, and should ONLY be output to what was specified in "Send to"

The Default setting is 12am and Normal Priority

12am will have the effect that the document is processed immediately

Setting any time earlier than the time the doc is sent



## 10. Printing

Did the Document print in accordance with the following rules

Once the time set for the printing has arrived - check the list of documents to print at this time

Select the Highest Priority

From all the documents to print at this time and have equal priority, select the first in the queue and start printing

In the case of 2 such documents in 2 different queues, it is random as to which one will be chosen, as the Doc Server loops through the queues and will select the document that fits all conditions to be the next one printed, from the queue that it happened to be scanning at the time.

In the case of a printer going offline during a printjob, or the job being cancelled at the printer, this will, at this stage NOT be indicated as a failed print.

When Doc Server is installed and running, any printing of any forms and reports should NOT be printed via the normal ABMReporting method. The way to notice this is that when a printjob was sent for printing - it did not show in the queue (in the pending documents). If this occurs it may be because there was another ABMReporting present and ABMReporting needs to be registered

If Printing is set to "No Printing" or "Print in a batch later" in ABM - then nothing is sent to the queues.

If you "Print / email saved documents" - this will then get sent to the queues as specified

Any Printer can be used for any number of queues and different documents in the same queue may be printing to different printers, in other words the printer is independent of the queue, but a document is specific to a queue and a printer

There should not be any delays in normal ABM use as a document is sent to a queue  
Queued documents are not dependent on ABM running at the time of printing.

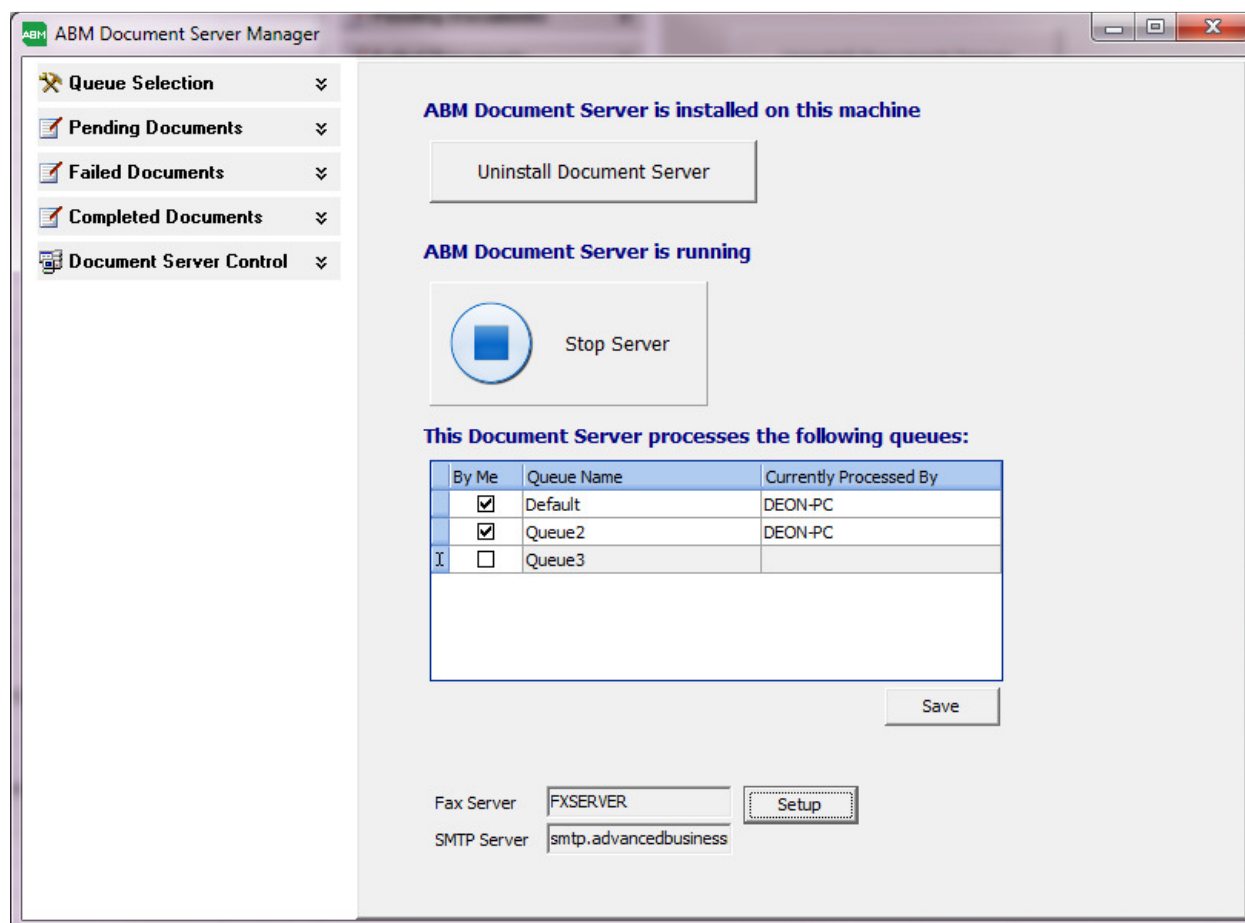
ABMCrystal instances.

If you have DocServer running and have also opened ABM, then you will have 2 instances of ABMCrystal running. One instance for ABM and one for Docserver. The Crystal instance for ABM will handle previews and anything not related to queues.

When you close ABM, the ABMCrystal instance for Doc server will remain in the task manager as a running process since the Docserver service is still running.

You would have to stop the service to end the ABMCrystal instance related to Docserver

## 11. Email



If you have Docserver installed and running, then emailing will NOT work using Outlook as Outlook does not work when run as a service

The setup button then opens the screen below and will then display the fax and smtp servers in the boxes.

You cannot make changes directly to these boxes. Use the setup screen

Emailing will be using an smtp server. This can either be Microsoft exchange or some other smtp server (Use SMTP Server)

Using Microsoft Exchange (ensure the button is selected for "Use SMTP Server")

The server name will then be your internal mailserver name

The username and password fields will not be required if you have signed in with your windows username and password, as this is likely to be a trusted connection

The From address is the address that the email will state it has come from when viewed on the receiving end.

The reply to address is the address that will be used if the receiver replies to the email

The bcc address will receive a copy of the mail and can be used to record all outgoing mail for instance

Using another smtp server (not Microsoft Exchange)

In the screenshot example this means abm's smtp will be used

usually something like "smtp.mycompany.com"

The username and password will be required

The username would probably be your email address

The password is the password for your email address

Click OK

**Select Fax and E-Mail Server**

Select the method that you wish to use to send faxes and e-mails from ABM. These settings will apply only to your user login, but will be applied for all workstations that you log in on.

**Fax**

☐ Use default Crystal fax sending using MAPI via MS Outlook and MS Exchange

☒ Use Microsoft Fax Service with the following settings

Server Name

**E-Mail**

☐ Use Microsoft Outlook

☒ Use SMTP Server

Server Name

Username

Password

From address

Reply-To address

Bcc address

Ok Cancel

You may need to restart the service

In Docserver click - "Stop Server"

wait a few seconds

Start Server

Open an existing invoice and click the email button

type in the email address to send to

assuming that the sales invoices form is set in formsettings to be processed by a queue and that the queue is being processed, then after a few seconds the invoice will show in "Pending Documents"

In 15 seconds or so, it should then be removed from "Pending Documents" and now show in "Completed Documents".

Within a short while after that, the email will be received by the addressee as well as the bcc address

Note that if a document is set to be emailed, lets say a sales delivery, but in formsettings, this form has NOT been set to go to a queue, even though Doc Server IS being used for other documents, then the email will be sent immediately, but not via docserver, and it will use the mail settings that have been set on the email server, ie the smtp settings.

The same will happen if DocServer is NOT running

In both cases above the black screen for blat.exe will come up for a few seconds

If an invoice is emailed, and the form is set to go to a queue, but The Docserver service has been stopped, the document will STILL go to the queue but will not be processed until the service is started (press "start Server")



## TROUBLESHOOTING SMTP mail

If email is not received - then there may be a fault with the username and password for smtp mail assuming you are Not using Microsoft Exchange

it may also be that the username you are using should or shouldn't be using the extension @mycompany.com for instance

If you don't know the password for your email, the network administrator should look this up

If you are using Microsoft Exchange and the email has NOT been received

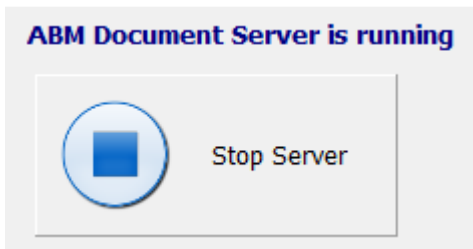
You have a username and password entered below the server name field, try removing these as these will often not be needed with microsoft exchange

ensure you have a valid addressee, check spelling

enter a bcc address - different to the addressee, giving another opportunity to see if this email is received, even if the main addressee is not

If a black screen is visible for some seconds (blat.exe which is used by Docserver), then there may be a problem with the servername that you have entered

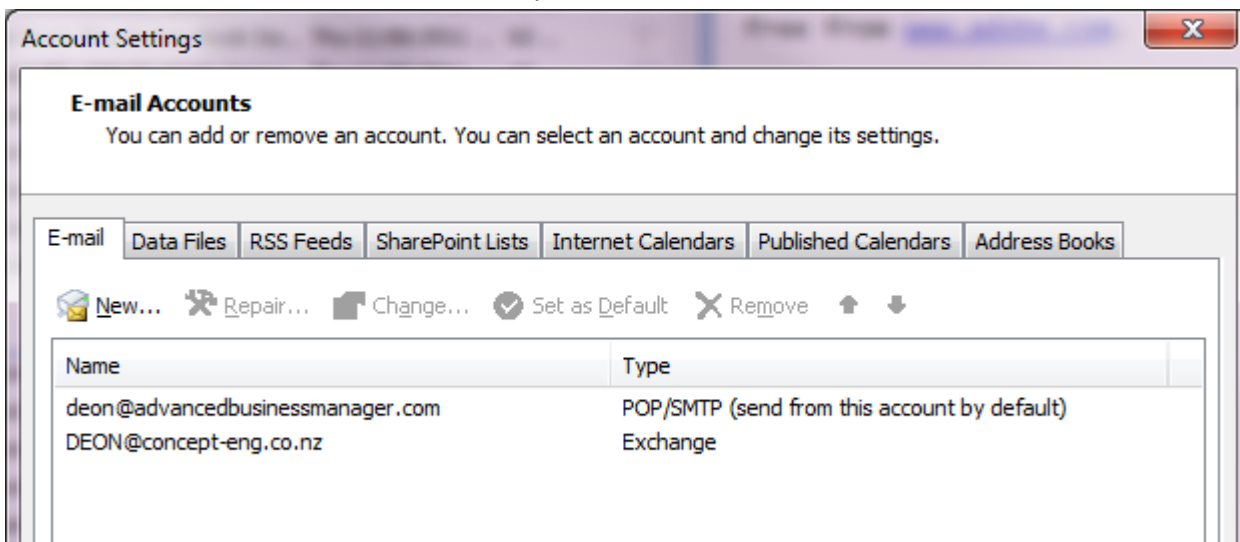
If sent emails just stay in pending and don't ever get moved to "Completed", then Stop the server and start the server again. (Takes some seconds to stop and restart the service.



It is possible to independently check the smtp setup using Microsoft Outlook, even though Microsoft Outlook has nothing to do with Docserver

The "Test account Settings" can be used for POP/SMTP accounts

Go to the accounts in Outlook and double click your POP/SMTP account



Clicking Test Account Settings will send a test mail to your email address. If this is not correct then the outgoing mail server, username or password could be wrong.

NOTE : for this test to work - you do need to ensure that you are using authentication.

Click More settings - then the "Outgoing Server" tab

Ensure you have it checked as below - to use authentication

Change E-mail Account

### Internet E-mail Settings

Each of these settings are required to get your e-mail account working.

**User Information**  
Your Name:   
E-mail Address:

**Server Information**  
Account Type:   
Incoming mail server:   
Outgoing mail server (SMTP):

**Logon Information**  
User Name:   
Password:   
☒ Remember password  
☐ Require logon using Secure Password Authentication (SPA)

**Test Account Settings**  
After filling out the information on this screen, we recommend you test your account by clicking the button below. (Requires network connection)

Click More settings

Internet E-mail Settings

General | **Outgoing Server** | Connection | Advanced

☒ My outgoing server (SMTP) requires authentication:

- ☒ Use same settings as my incoming mail server
- ☐ Log on using
  - User Name:
  - Password:
  - ☒ Remember password
  - ☐ Require Secure Password Authentication (SPA)
- ☐ Log on to incoming mail server before sending mail

## 12. Fax

Select Fax and E-Mail Server

Select the method that you wish to use to send faxes and e-mails from ABM. These settings will apply only to your user login, but will be applied for all workstations that you log in on.

**Fax**

☐ Use default Crystal fax sending using MAPI via MS Outlook and MS Exchange

☒ Use Microsoft Fax Service with the following settings

Server Name:

**E-Mail**

☐ Use Microsoft Outlook

☒ Use SMTP Server

Server Name:

Username:

Password:

From address:

Reply-To address:

Bcc address:

Ok Cancel

If you are NOT using Docserver then the following options apply

Carry on using Outlook as normal

OR access the faxe and Email Server setup screen via the Report Tools

You can setup to use emailing via an smtp server giving you the option of not using Outlook, but the following should be noted.

If you set the option in Tools - options to preview emails before sending, then Outlook WILL be used for the sending of emails even though you may have set the settings to use smtp

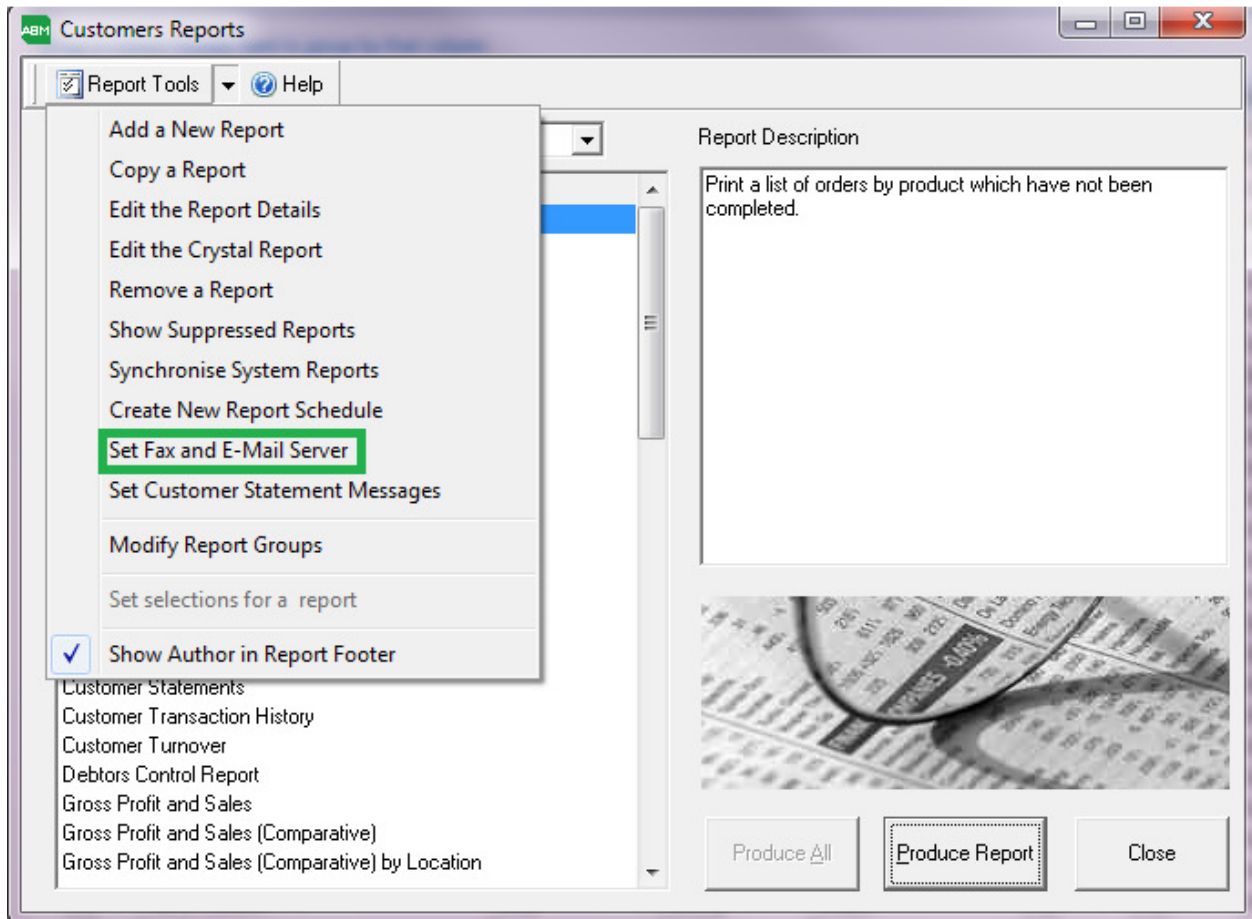
## 13. Emailing with SMTP (NOT using Docserver)

If you are NOT using Docserver then the following options apply.

Carry on using Outlook as normal OR access the fax and Email Server setup screen via the Report Tools

You can setup to use emailing via an SMTP server giving you the option of not using Outlook, but the following should be noted.

If you set the option in Tools - options to preview emails before sending, then Outlook WILL be used for the sending of emails even though you may have set the settings to use SMTP



**Select Fax and E-Mail Server**

Select the method that you wish to use to send faxes and e-mails from ABM. These settings will apply only to your user login, but will be applied for all workstations that you log in on.

**Fax**

☐ Use default Crystal fax sending using MAPI via MS Outlook and MS Exchange

☒ Use Microsoft Fax Service with the following settings

Server Name:

**E-Mail**

☐ Use Microsoft Outlook

☒ Use SMTP Server

Server Name:

Username:

Password:

From address:

Reply-To address:

Bcc address:

Ok Cancel