



DocStar ECM

User Editable Tables (UET) Technical Guide

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Overview

About this Guide

This technical guide will detail how to configure and use a new feature called **User Editable Tables** in DocStar, introduced in Version 18.2. This guide assumes you have a working knowledge of how to do DataLinks and Integrations in order to setup User Editable Tables. It also assumes you have a working knowledge of how to setup Security Classes attached directly to users or through groups.

What is a User Editable Table (UET)?

A UET is a way to simplify being able to update data that comes from a DataLink or Integration. UETs also allow for cleaner workflows with less branches and the ability to have lists of data that can be easily updated by a non-technical user.

A Practical Example

Consider a complex approval workflow where an expense report needs to be approved, by different people, based on department and/or expense amount. This kind of workflow would consist of many branches, where each branch is set to a department and then more branches after the department branch based on the expense amount maximum. You can see how this workflow gets very wide and complicated quickly. Now consider that the maximum expense amount changes or an approver changes. This poses a problem when you have many different departments because you now have to edit many different workflow steps with the change. You can see how this is tedious and prone to error. This is where UETs are useful; you can simplify your workflow and allow a non-technical user to be able to keep the approval data up to date.

Administration

Setup

The gateway permission “**Admin. Datalink**” grants access to the UET and DataLink admin pages. This is the UET admin page:



A UET has the following parameters that need to be configured:

Name – This is the name of UET, which will appear in the Select Table dropdown when successfully saved

Security Class – This is the security class used to configure users view and modify access to the UET

Page Size – If the DataLink supports paging, this is the maximum records displayed on each page of the table

Read DataLink – Datalink query that gets the data and possibly supports paging

Insert DataLink – DataLink query that inserts a row and reloads the data in the table

Update DataLink – DataLink query that updates an existing row and reloads the data in the table

Delete DataLink – DataLink query that deletes data from the table

DataLink Setup

When configuring a DataLink or Integration DataLink for a UET, four separate queries are required: Read, Insert, Update, and Delete. The read query can use paging with @skip and @take (“*OFFSET @skip ROWS FETCH NEXT @take ROWS ONLY*”) which uses the Page Size on the admin screen to determine the maximum rows on each page in the table. @take and @skip must also be parameters in your DataLink. The Read DataLink does not support the use of required parameters except @skip/@take but allows other optional parameters to be used besides paging.

The screenshot displays the DataLink Setup interface. At the top, there is a text area for the SQL Statement containing the query: `SELECT * FROM UET1 ORDER BY Id OFFSET @skip ROWS FETCH NEXT @take ROWS ONLY`. Below this is a section for Saved SQL Statements, which is currently empty. The main section is for Parameters, featuring a dropdown menu with options: "-- New --", "@skip", and "@take". The "@skip" option is selected. To the right of the dropdown, there are input fields for "Name:" (containing "@skip"), "Type:" (set to "Int"), "Default Value:" (empty), and "Test Value:" (set to "0"). A "Required:" checkbox is checked. A "Remove" button is located to the right of the Name field. At the bottom of the parameter section, there are three radio buttons: "Type Ahead" (selected), "Dropdown", and "Neither".

Insert, Delete, and Update must be configured using the “**Pop. Data**” option. Any required parameters must match column names in the DataLink data source, with '@' prepended. This does not mean the DataLinks must define all of the columns; they may define any subset thereof. Optional parameters can be specified as well.

DataLinks

- ec_Read Open Receipt lines
- ec_Read PO by PONumber
- ec_Read Receipt by VendDoc#
- ec_Read Sales Order by CSTP
- ec_Read Sales Order by SopN
- ec_Zip Code Test
- UET Delete
- UET Insert**
- UET Read
- UET Update

Name:

Connection:

Read Data
 Pop. Data Incl. Docs. Doc. Path

SQL Statement

```
INSERT INTO UET1 (Id, TextField, DateField, IntField) VALUES (NEWID(), @TextField, @DateField, @IntField)
```

Parameters

-- New --

Name: -- New --

Type:

Default Value:

Test Value:

Required:

Type Ahead Dropdown Neither

Security

As mention in the setup section the gateway permission Admin. Datalink grants access to the UET and DataLink admin pages. You can grant access to non-admin users through security classes attached to each UET configuration. This allows non-admin users to view or modify data within a UET that they have been granted access to through a security class.

Configuration and Customization

The UET edit view can be customized in a variety of ways. Below is the admin screen:

User Editable Tables

Select Table:

Name:

Security Class:

Page Size:

Read DataLink:

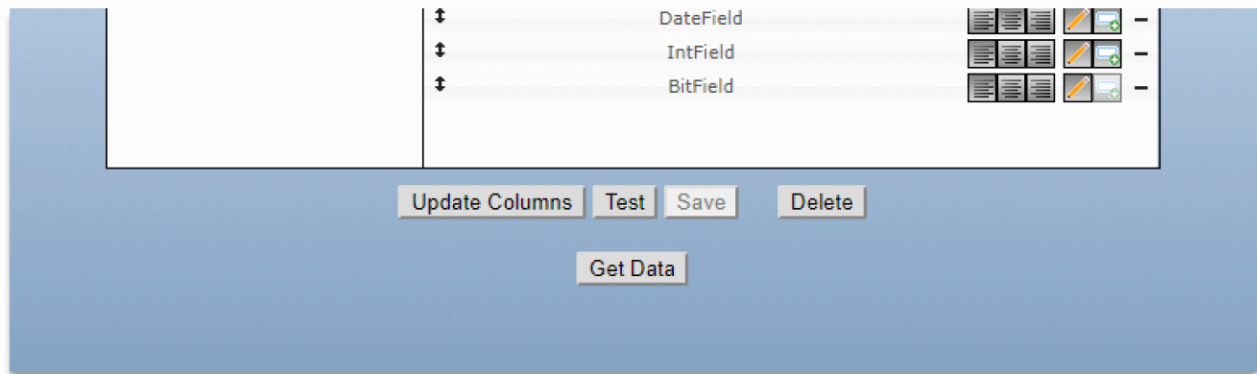
Insert DataLink:

Update DataLink:

Delete DataLink:

4 items selected	
Id	TextField
	DateField
	IntField
	BitField

Using the list of columns, found underneath the DataLink selections, admins can rearrange the order in which they appear to the user. Admins can also change the alignment of each columns values. Using the + and the – admins can make columns visible and hidden accordingly.



There are a several buttons below the column configuration grid, what each button does when clicked is listed below but also has a tooltip if you hover over the button without clicking it.

Update Columns – Updates what columns are in the column configuration grid if the Read DataLink has changed in such a way that columns were added or deleted.

Test – Tests all DataLinks by inserting, updating, reading, and then deleting a row of random data. The test may not be compatible with all DataLinks. A failure to delete may leave the random row in the table.

Save – This saves the entire UET and enables it for use by users that have permission.

Delete – Deletes the UET but retains the DataLinks it was configured with and any data in the external data store.

Get Data – Executes the Read DataLink and populates a table below the buttons. This table will be displayed exactly as users with permission through the security class will see it.

User Guide

Overview

When a non-admin user with permission to one or more UETs navigates to the admin screen they can select a UET to view from the “**Select Table**” dropdown. The UET will populate with the preconfigured table like the following:

Edit	TextField	DateField	IntField	BitField	Delete
	Maintenance	6/21/2018 12:00:00 AM	2	True	
	Support	6/23/2018 12:00:00 AM	4	True	
	Management	10/24/2018 12:00:00 AM	7	True	
	HR	6/18/2018 12:00:00 AM	6	True	
	Accounting	6/20/2018 12:00:00 AM	1	False	
	Sales	6/22/2018 12:00:00 AM	3	False	
	R&D	6/25/2018 12:00:00 AM	5	False	

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This will give them the option to edit, insert, and delete data from the UET like many other grids/tables that exist in the system. Note that and updates or inserts made in this table will immediately be made in the external data store associated with the UET/DataLink.