# Epicor ECM (DocStar) - Exporting & Sharing

Sometimes, you’ll need to share documents, export them, or even print them out.

This course looks at how to print and email documents, save copies, and export them to CSV or HTML formats. Select the first topic to continue.

Objectives

* Printing
* Emailing
* Saving a Copy
* Exporting Metadata to .csv or .html

Printing

While keeping documents in digital format is ideal, there may be times where you need to print something.

When you have a document open in the document viewer, just select Actions > Print.

Now, select your options. You can enter which pages you want to print. And, you can choose whether to include Annotations or Redactions on the printout.

If you’re printing to a PDF writer, select Create as a Single File to make sure any multiple-page document is combined into one PDF file.

When you’re ready to go, select Print.

If you don’t have the Client Service Running, your internet browser’s print dialog displays.

If the client is running, when you select Print from the Actions menu, there’s a few extra print options at the top – the format.

If you want to include annotations or redactions in the printout, you cannot use Native format, because this format does not display annotations and redactions.

So, for example, select PDF, then select Include Annotations, and click Print.

Now you can see the system uses the client to deliver the annotated PDF to the workstation, where you can then access the computer’s print options.

If you’d rather not use this Client Service feature, you can disable it. In User Preferences, got to Settings, and clear the Print check box under Use Client Service When Available. Hit Save.

On the Retrieve screen, you can also print multiple documents at once. Perform a search, then select the items you want to include. From the Actions menu, select Print.

Your available options will depend on the status of your Client Service. If it’s connected, the same enhancements are available here.

Emailing

You have several options when it comes to emailing documents. It can be as simple – or as complex – as you need it to be.

While viewing an item, go to the Actions menu, and select Email.

In the Send window, first select your recipients. If your Client Service is running, and you use an email client on your workstation, the system references your address book, and offers suggestions as you type.

Now, enter a Subject for the email, and a suitable message in the Body field.

By default, the system is set to send View-Only documents as an attachment, in their Native format. This is OK if you don’t need to include any annotations or redactions. Click Send, and away it goes.

But what about the alternative options?

You can select the radio button to send a Direct Link to view in Epicor ECM (DocStar). If the recipient is a fellow Epicor ECM (Docstar) user, this enables them to open the document directly in their system.

On the other hand, use the View Only option to send a read only copy of the document. You can choose to either send a link for the user to download a .zip file from your Epicor ECM (DocStar) server, or send it as an attachment, or both.

If you’re sending an attachment, you can also set the page range to send, decide whether or not to include annotations or redactions, and decide whether or not to zip it.

If the item you’re sending has been burst, and contains multiple pages, clicking Create as a Single File will recombine all the pages into one single file.

To select pages, include annotations and redactions, and use the Single File option, you’ll need to set the version to PDF or TIFF, since native versions do not contain any markup.

You can also create a custom URL to view the document on your Epicor ECM (DocStar) server. Click the circular arrow to generate the URL for this document.

If you need to password protect the link, enter a Password below. Whether you’re sending a custom link, an attachment, or a .zip file, this same password will apply.

Now, you may want more control over the look and feel of the emails you send. If the Client Service is running, you’ll also see the Open in Outlook option. Click this, and the system will copy and paste all the information and settings into an Outlook message, where you can further tweak it to suit your preferences.

One thing to note: If you’re using Epicor ECM (DocStar) “on premise”, the ability to access links to items can vary in certain situations. If the network housing your (Epicor ECM (Docstar)) system isn’t accessible outside of your company’s infrastructure, your (external?) recipients won’t be able to open links you send them. If that case applies to you, you’re better off sending attachments.

If you’d rather not use the email enhancements provided by the Client Service, you can disable them. Go to User Preferences > Settings, clear the Email check box, and select Save.

Finally, you can also send multiple items at once, from the Retrieve screen. In the search results grid, select all the items, got to Actions, and select Email. As we’ve seen, your available options depend on whether the Client Service is running. If you select Create a Single file, this will combine all items into one PDF or TIFF (!)

Saving a Copy

Sometimes, you might need to download a document to save on your workstation.

To do this while viewing a document, go to Actions > Save a Copy.

Next, select the format to convert the item to. If you’d like the original item, and don’t need any annotations or redactions, select Native, and click Save. The item is saved in your workstation’s Downloads folder.

If you do need to include annotations or redactions, you’ll need to select either PDF or TIFF.

If the item is a multi-page document that has been burst, select Create as a Single File to combine all the pages in one file, instead of a collection of individual files in a zip.

If your system is integrated with DocuSign, and the document has been signed, you can select Signature to download the eSignature version of the item.

If you’d like to add password protection, enter the Password here. Now, click Save, and the file is delivered to your Downloads folder.

On the Retrieve page, you can select multiple items to save. Again, go to Actions > Save a Copy. To consolidate multiple documents into one file, select Create as a Single File.

Hit Save.

Exporting Metadata

Another useful tool is the ability to export the metadata for your documents. You can export to a CSV (spreadsheet format) or to HTML (web page format).

On the Retrieve page, I’ve done a search, and I’ve chosen to display certain columns, as the export will include the data columns currently on display in the grid.

To export the data for one, or just a few documents, select the items in the grid, go to Actions, and select Export, then either Export to CSV or Export to HTML. We’ll select CSV this time.

Once the export has been created, click the link to download it to your workstation’s Downloads folder\*

Let’s open the file to take a look. The columns correspond to the current columns that displayed on the Retrieve page, plus there’s a Document Link column, so if the person viewing this CSV file has Epicor ECM (DocStar) access, and View rights to the document in question, they can access the link to open the document.

What if there is a large volume of items? For example, in this search, I’ve displayed all items of a particular content type, and I want to export the whole lot. No need to check any boxes. Make sure your view filter lists all the available documents, then go to the Actions > Batch Actions, and select either Export All to CSV or to HTML. This time, let’s go for HTML.

In the Export dialog, click to download the file. Once it’s downloaded, open it up. Just like before, we see all our columns here, with the document links on the left.

Recap

In this course, we looked at how to print, email, and save copies of documents. We also saw how to export documents’ metadata to a CSV or HTML file.

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