

Managing ADL Forms in REST Professional and fileSMART

Overview

This guide describes how to use REST Professional with fileSMART Archive document management integration when ADL forms is being used to create merged PDF documents.

Step by Step

This is a step by step tutorial showing how to generate an ADL forms mail merge from REST and then store it in fileSMART Archive. It also shows how to retrieve an FRM file so that it can be edited after it has been stored in fileSMART.

Note: If you need to include an ADL generated PDF in an end-of-month collation refer to the end of the document.

Step 1 - Generate a new document

The first step to managing an ADL form in fileSMART is to create one using the REST Professional Letter Writing tool. This is accessed using the Other [] Print Letters and Export Data menu command in REST Professional.

🔨 Letter Writi	ing					
Merge with	Tenant	~	Filter			1
Turne of Letter	renark		Email address	All	*	
Type of Letter	General	*	Mobile number	All	*	
Contact	Primary	*	Inspection Type	None	*	
Manager	All	~				
Property Type	All	~				
Sort and filte	r by Area Code Area Cod	e				
All		×				
- Selection						1
Status	Active 🗸]		Property order		
🔿 All		-				
🔘 Range	Start at Alpha Index					
	Finish at Alpha Index					
 Select 	ANISTONJ		*			
Qutout						×
Mail Merge Excel File Email						<u>Cancel - ESC</u> Pre <u>v</u> iew - F11
• ADL Forms	Update tenant history	✓ Do	ocument Management			✓ <u>S</u> tart - F12

In this window we have selected a single tenant with alpha code ANISTONJ, and have set the Output mode to ADL Forms. To create the new form click the Start button. This results in ADL forms launching the form selections window as shown below.

SADLForms Third Party Me	erge Options			×
Forms Package: Real Estate NSW - Property S Real Estate NSW - Property M Real Estate NSW - Commercia Real Estate QLD - Property Sa	ales lanagement al & Industrial iles			
Forms:				
	Form Title		Form Name	Version 🔼
Notice of Leases or Subleases	s to Owners Corporations		AU-NSW-RE-PM-025	1.2
Notice of Rent Increase			AU-NSW-RE-PM-018	1.7
Notice of Sale of Premises	Notice of Sale of Premises AU-NSW-RE-PM-040 1.0			
Notice of Termination			AU-NSW-RE-PM-007	1.6
Notice of Termination - Death (Notice of Termination - Death of a Tenant AU-NSW-RE-PM-057 1.0			
Notice to Applicant (Listing on a Residential Tenancy Database) AU-NSW-RE-PM-045 1.0				1.0 🗸
Select a Template to Use ** Do not use a template **		Action Print to (File Sav Output View	Printer e Settings will apply) to PDF	
Where Value Set in Template, Do Not Use Third Party Value (Edit, Print, Save &/or Output to PDF)				PF)
Auto Save Yes No Lock on Save (File Save Settings will apply)	File Save Settings (for Auto Save & Output to PDF options) Save in Folder: C:\ADLForms\Files\ Filename Format: Owner Code, Date, Form Name NB: Files will be overwritten unless a Unique Number is specified in the format			
Save above settings as def	ault		ок	Cancel

In this case we select a Notice of Termination and click OK to open it in the ADL form editor

Step 2 – Edit and Save the Form

The next step is to add any additional information to your form using the ADL forms editor as shown below.

C:\ADLForms\Files\UNTITLED.FRM (AU-NSW-RE-PM-007)	
ijle <u>E</u> dit <u>V</u> iew Help	
Save Save As Save As Notice of Termination (V1.6) Clear Form Print Save as Quit Page 1 * Denotes Terms or Notes V Show Terms/Notes Pages	🕐 Help Bar 🛛 👽
	Hide Field Options Menu
NOTICE OF TERMINATION Residential Tenancies Act 2010 (The Act) - Sections 84 - 89 To the Tenant/s: Further information about your rights and obligations can be found in your Residential Tenancy Agreement Tenant/s Names and Address: Jennifer Aniston JAVAD Gibson Street	Select From List Add To List Cut Copy Paste Delete Select All Force Date to Template Leave Blank When Merging using Template Always hide menu on startup
NORTH SYDNEY NSW 2060	
TO THE TENANT/S (Names of Tenants to whom this notice is being served)	
Name/s: Jennifer Aniston	
IN RESPECT OF THE PREMISES	
Address: 4/40 Gibson Street, NORTH SYDNEY NSW 2060	
NOTICE GIVEN BY LANDLORD / AGENT	
Landlord: Michael Douglas & Catherine Zeta-Jones	
Landlord's Agent: Rockend Technology	
Address: P.O. Box 451, St. Leonards NSW 1590	
ABN: Phone: (02) 9966 0900 Fax: (02) 9966 0911 Mobile: () Email: Person Giving Notice:	
VACANT POSSESSION (see below for notice periods required)	
The Tenant will deliver up vacant possession of the Premises on: (Termination Date)	
REASON FOR TERMINATION OF TENANCY AGREEMENT (Please tick the appropriate box and fill in detail where required)	
This Notice of Termination is being served in accordance with the Act on the ground as ticked below:	
End Fixed Term - Section 84 of the Act Termination Date: Not earlier than 30 days after the day on which notice is served or on or after the day the term of the Tenancy Agreement ends, whichever is the later.	
End of Periodic Agreement - No Grounds - Section 85 of the Act Termination Date: Not earlier than 90 days after the day on which notice is served.	
Premises are being sold & vacant possession is required - Section 86 of the Act The Landlord has entered into a contract for the sale of the residential premises. Termination Date: Not earlier than 30 days after the day which notice is served.	
Breach of Agreement - Section 87 of the Act The Tenant has breached the Tenancy Agreement in the following manner:	
	▲

To get this document into fileSMART you need to save it to your fileSMART queue import folder. This will usually be on your local computer at C:\AS_FILES\QUEUE\<your windows login name>. You have the choice of saving the form as an FRM file if you need to make changes to it later or simply save the completed form as a PDF only.

To save the document as an FRM file use the Save As command in the ADL form editor. By saving the FRM file you can later search for the document in fileSMART Archive and open it back into the ADL form editor to make further changes. Use the Save as PDF File command to save it as a PDF file – you will not be able to change this file after it is saved.

This next screen shot shows how the save window looks in Windows XP.



You'll see that in this case the user had logged on to windows with the name "fileSMART". In your case your login name will be the name of the target folder.

Step 3 – Archiving the form

The next step is to launch and log in to fileSMART Archive. You will see that the PDF and FRM files that you saved in Step 2 are now in your pending queue.

🔤 fileSMART Archive						
Eile ⊻iew Scan ⊆heck Subscription Help						
Control Panel						х
	M 🛛 🖉) 🖉 📘			🚡 🛛 🔗	
Libraries ×		🕄 - 🛯 📥 📄 🚺 / 1 🖉 🕥	(*) 76.8% *	Find -		
My Archive Folders						
🖻 😴 MAIN	<u> </u>					
UieneralAccount:						
		N	DTICE OF TER	RMINATION		
PropertyManagement		Residential	Tenancies Act 2010 (1	The Act) - Sections 84 - 89		
- 📁 Sales	T I	To the Tenant/s: Further information about	your rights and obligat	tions can be found in your Residential Ten	ancy Agreement.	
🦳 📁 SalesAdmin 📃	66	Tenant/s Names and Address:				
🗄 🐔 STRATA 🛛 💌		4/40 Gibson Street				
Archive Documents View 🗙						
Pending Documents 🤯 Recycle Bin		NORTH SYDNEY NSW 2060				
ID Date Type TO THE TENANT/S (Names of Tenants to whom this notice is being served)						
214 22/02/2013 11:07 AM pdf	Namels: Jennifer Aniston					
☑ 217 22/02/2013 11:20 AM fm	- IN RESPECT OF THE PREMISES					
	Address: 4/40 Gibson Street, NORTH SYDNEY NSW 2060					
		OTICE GIVEN BY LANDLORD / AGENT	- I			
		andlord's Agent Rockend Technology	la-Jones			
	Address: P.O. Box 451.45 Leonards NSW 1590					
	Archive Labels View					X
	Prop Code	GIBSON40/4	Doc Туре	Notice - Termination		
	Address	4/40 Gibson Street 🔽	Date	22/02/2013		
	Owner	Michael Douglas & Catherine Zeta-Jo 🔽	Notes			
	Tenant	Jennifer Aniston 🔽				
	Manager	CK 🖌	Show on Portals	0wner]	
	OCode	DOUGLAS		Tenant		
	TCode	ANISTONJ				
Select All Selected: 2, Total: 2	Enable Predictive	e Text 🔲 Clear Archiving Labels				
User: admin - Status: Archiving						

You'll see that we have both a PDF file and an FRM file in the pending queue. Notice that they are both checked so that we can archive them in one step. By putting the focus on the PDF file we can see the details on the form to help us set the archiving meta-data.

Archive Merge	×
Do you want to merge files?	
Yes No Cancel	

Once the form is complete press the Archive button to send the documents into fileSMART. You will be prompted with a message asking if you want to merge the documents. Make sure to press the No button here as these documents cannot be merged.

Step 4 - Searching and Opening

The final step in the process is when you want to retrieve an ADL form from fileSMART. This is really no different from searching for any other document. Simply launch fileSMART Archive, put it into search mode, enter your search criteria and hit search.



In this case we got back both the documents that we archived previously. That is, the PDF and FRM file. In this the FRM file is highlighted in the result list. Notice that the view of this document has a Click here link displayed. By clicking on this ADL forms will launch and open this document up so that it can be edited. Once you have finished with your changes simple press Save. There is no need to save it back to the pending queue.

End-of-Month Collation

ADL Forms encrypts the PDF file that it creates and prevents a number of editing operations being performed on them. This means that fileSMART PrintMail cannot collate them because we cannot open the document. This only affects PDF files that you need to include in a collation. If you don't then fileSMART Archive can manage them perfectly well.

If you do need to collate an ADL generated form you have two options to make this possible:

- 1. Print the ADL generated PDF with the fileSMART Archive printer driver. This will put a black and white TIFF version into your pending queue. From there you can archive the document.
- 2. Print the ADL generated PDF with a third-party PDF printer driver. Please contact fileSMART support for how to set this up.

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