SOLUMA

Usage instructions
Soluma WebScan – M-Files integration

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1. Introduction

Soluma WebScan is an application that allows you to scan, upload and manage your documents with ease. Documents are scanned into pre-made "Batches", which enables you to send the entire contents of the "batch" to M-Files instead of each document separately. When a batch is exported, we can no longer add additional documents to it, making it necessary to create a new batch if we wish to add documents to it. The app also allows you to rotate document pages, hide sensitive information, and split invoices if the page contains several different invoices needed to be separated.

This document presents all the features of the Soluma WebScan application, its integration withing M-Files, and explains how to use it step-by-step.

2. M-Files Integration

Soluma WebScan enables users to seamlessly edit and organize existing documents within M-Files and facilitates the importation of documents by connecting multifunction devices for scanning directly through the WebScan interface. This integration enhances document management efficiency and flexibility within the M-Files environment.

Soluma WebScan is tailored for the Windows platform, guaranteeing compatibility and peak performance on a range of Windows-based devices. Its sleek, intuitive interface provides a seamless user experience, enabling users to swiftly grasp its functionalities and boost productivity with minimal training. Experience effortless integration with the M-Files environment as Soluma WebScan seamlessly blends into your workflow, facilitating document scanning and editing without the need to switch between multiple applications.

After the application has been installed on your vault and you have been added to the licencing model, Soluma WebScan Dropdown will appear on the left side. *
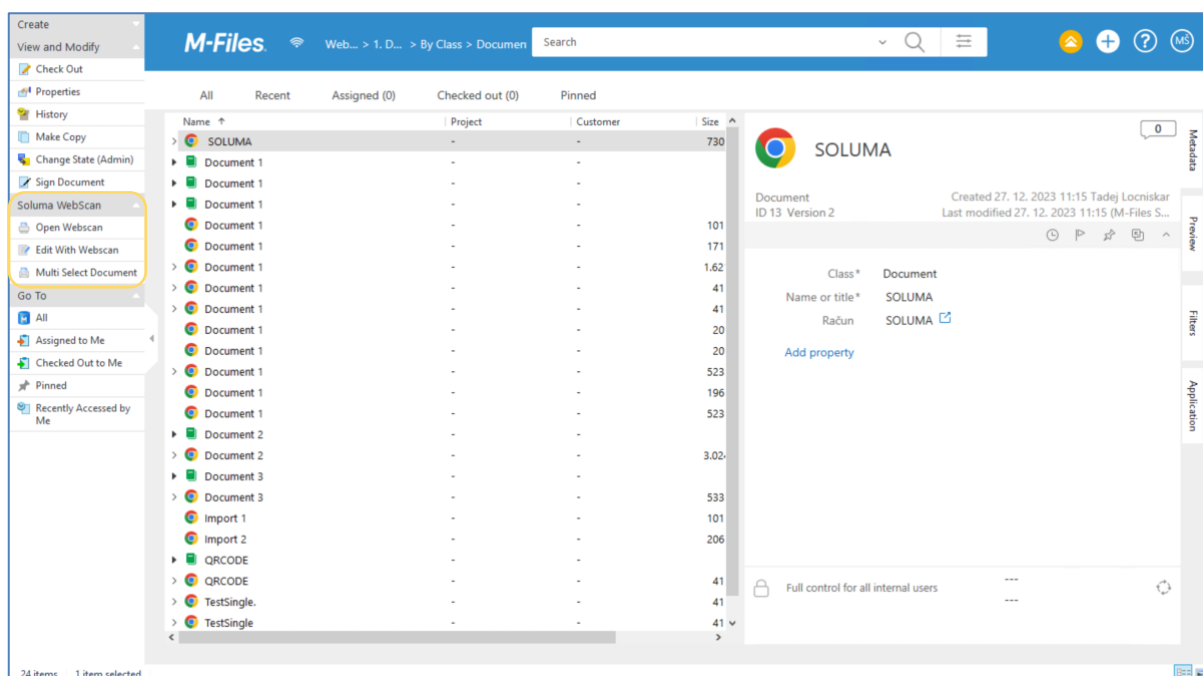

Picture 1: Soluma WebScan dropdown in left toolbar.

* If you cannot see the application contact your Administrator.

Open WebScan

Open WebScan button, opens the application where you can connect the TWAIN scanner and scan physical documents or import the digital files into WebScan. Edit and classify the documents created and export them to M-Files, where they continue in their own workflow.
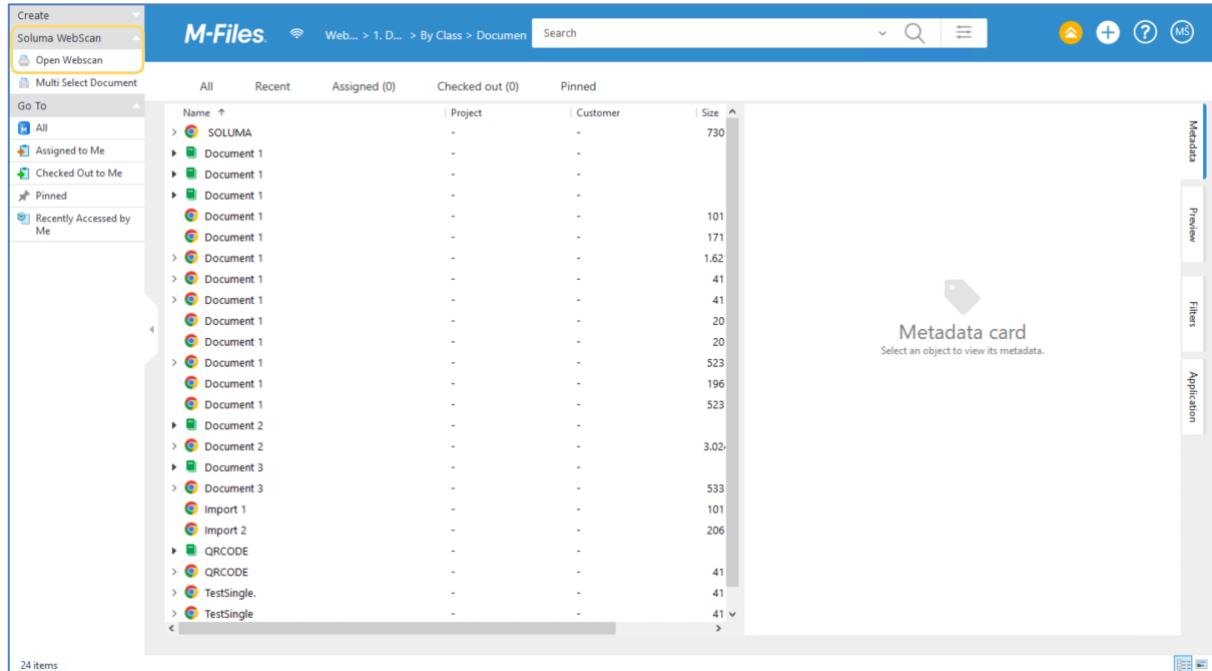
*Picture 2: Open WebScan button*

Edit with WebScan

This button is only visible when one or more documents are selected. When documents are selected, press Edit with WebScan and all the documents are displayed in the application. You can then edit, split or merge the documents, and when you are satisfied with your work, export the documents back to M-Files. You can preview all the changes you have made.
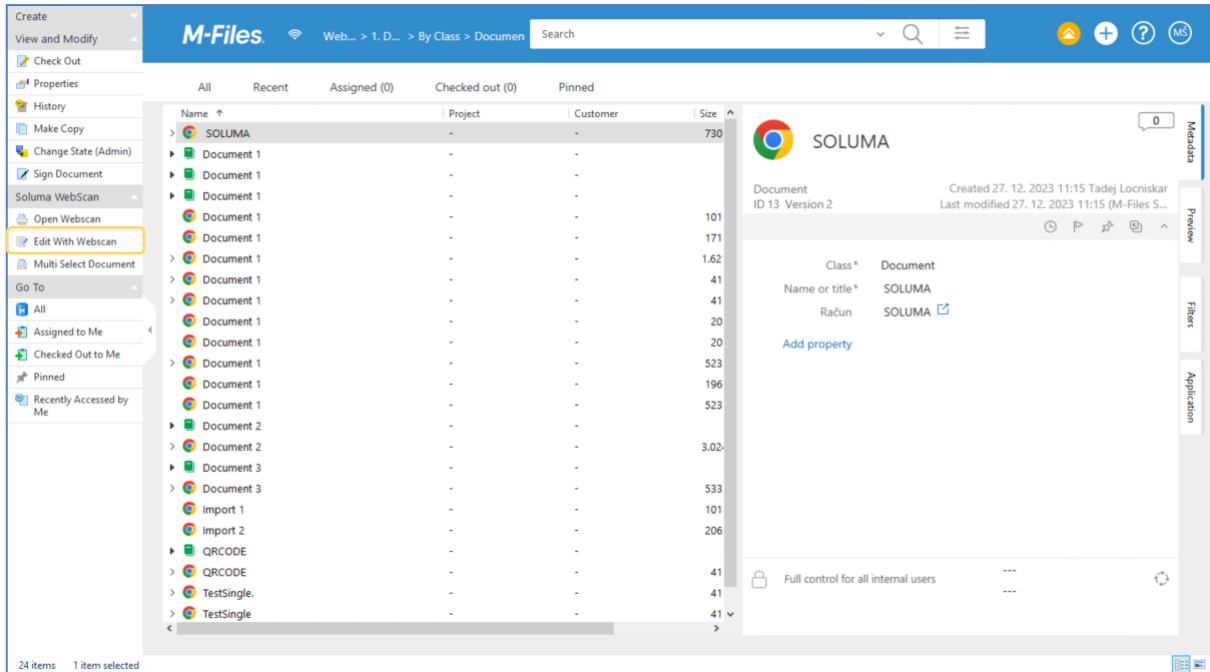
Multi Select Document

All documents imported into M-Files by e-mail must be classified and marked as received to start their own workflow. To start the process, select all the documents and press the Multi Select Document button. In WebScan, classify and edit the documents and export them to M-Files.
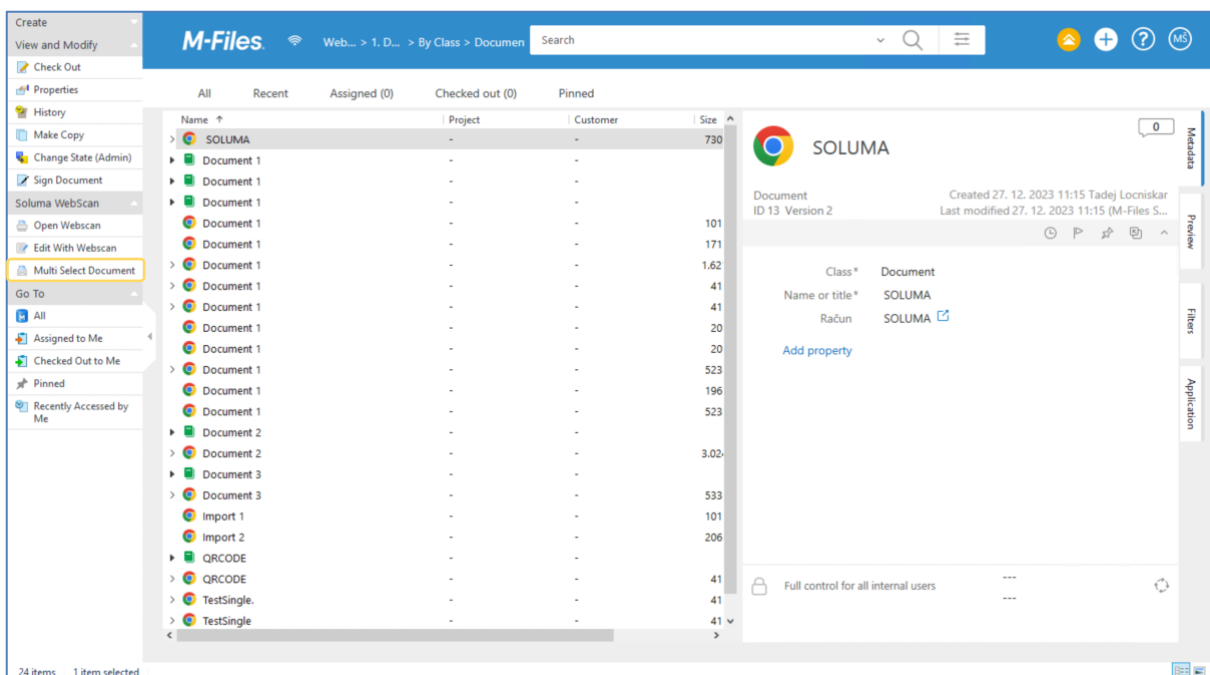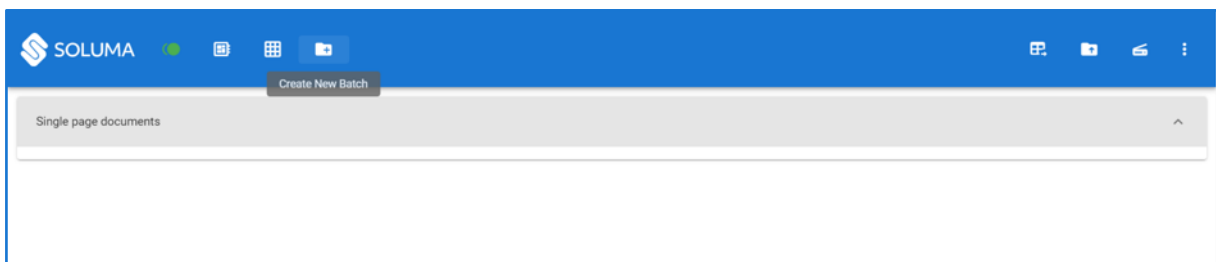
3. Create new batch

The first step of using the application is to create a batch where you can scan or load documents.
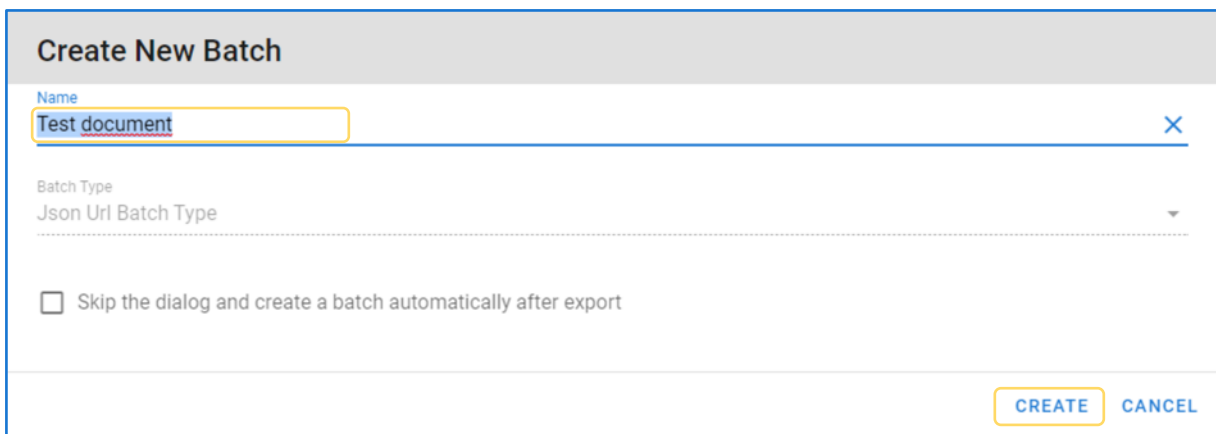
Batch creation process:

In the toolbar, press the "Create New Batch" icon (Picture 3).

A dialog box for creating a new batch will appear, promting you to name it (Picture 4).

Press the "create" button and the batch will be created (Picture 4).

Picture 3: Create new batch

*Picture 4: Naming the batch*

4. Scan document

You can upload documents to the batch in two ways, either by scanning the documents directly into the application or uploading files that are already on your computer.
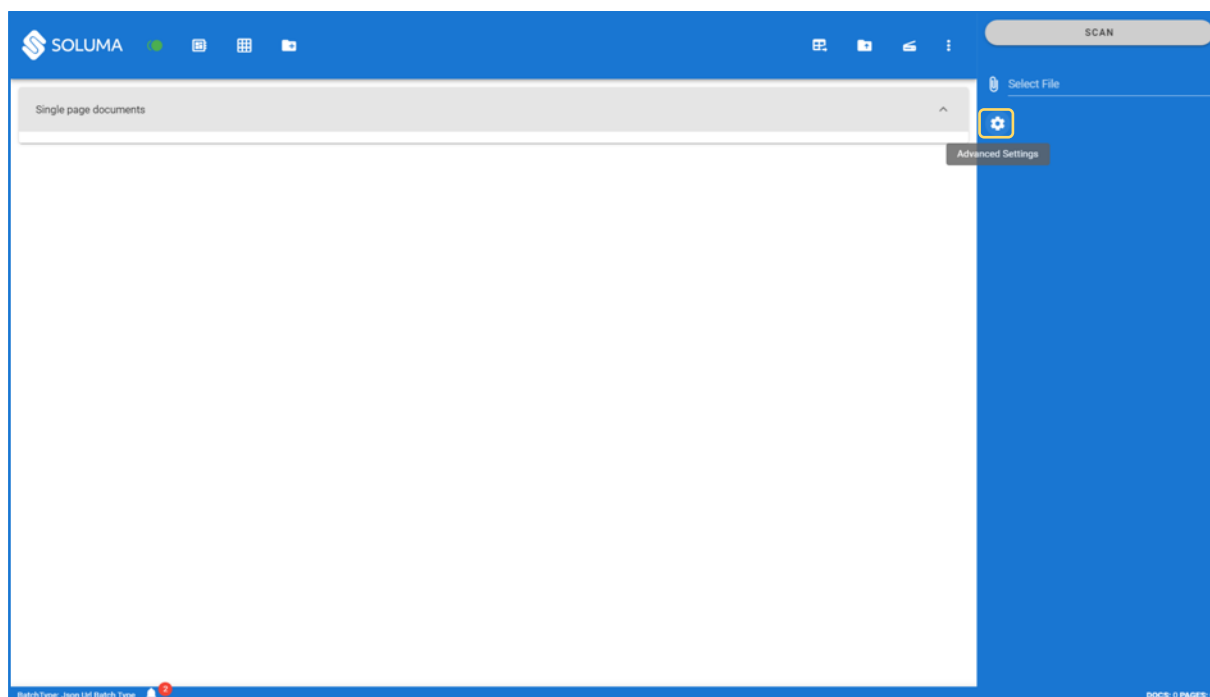
Document scanning process:

Click on the scanner icon named "Scan" (Picture 5).

Below the document loading field is a gear icon (Picture 6) where you can view which scan settings are set. All application settings can be changed from here (Picture 7).

Once you are satisfied with the settings, press the "Scan" button (Picture 8).
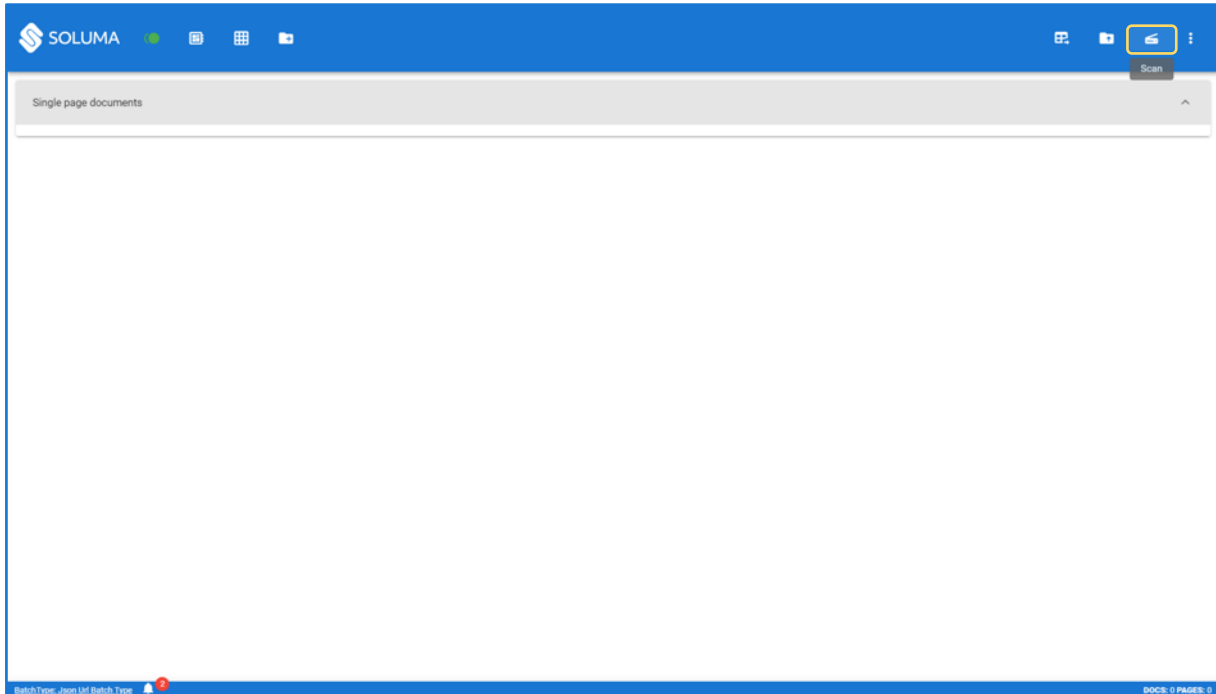
Picture 5: Scan the document

Picture 6: Document scan settings

* Advanced:

<u>Configuration settings:</u>

Automatic Separator (Circles) = This setting enables you to separate pages using a circular stamp. Each page with a separator represents the first page of a new document.

Automatic one-sided documents = With this setting enabled, each document included in the batch will automatically be sorted into one-sided documents, even though it contains several pages.

Automatic Separator (Barcode) = This setting allows you to separate pages using a barcode. Each page with a separator represents the first page of a new document. With this setting enabled, a new field appears where you can select the type of barcode and determine its location on the document so that the application program can find it faster and separate the documents (this is quite useful when scanning a large amount of pages)

Select device = When we connect our device to the computer, it appears in the drop-down menu. Drop down will list all the TWAIN complaint scanning devices.

**DPI** = In the drop-down menu you can choose what quality of captures you want.

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Color = In the drop-down menu, you can choose the color of the captures you want (Black / white, gray, and color).
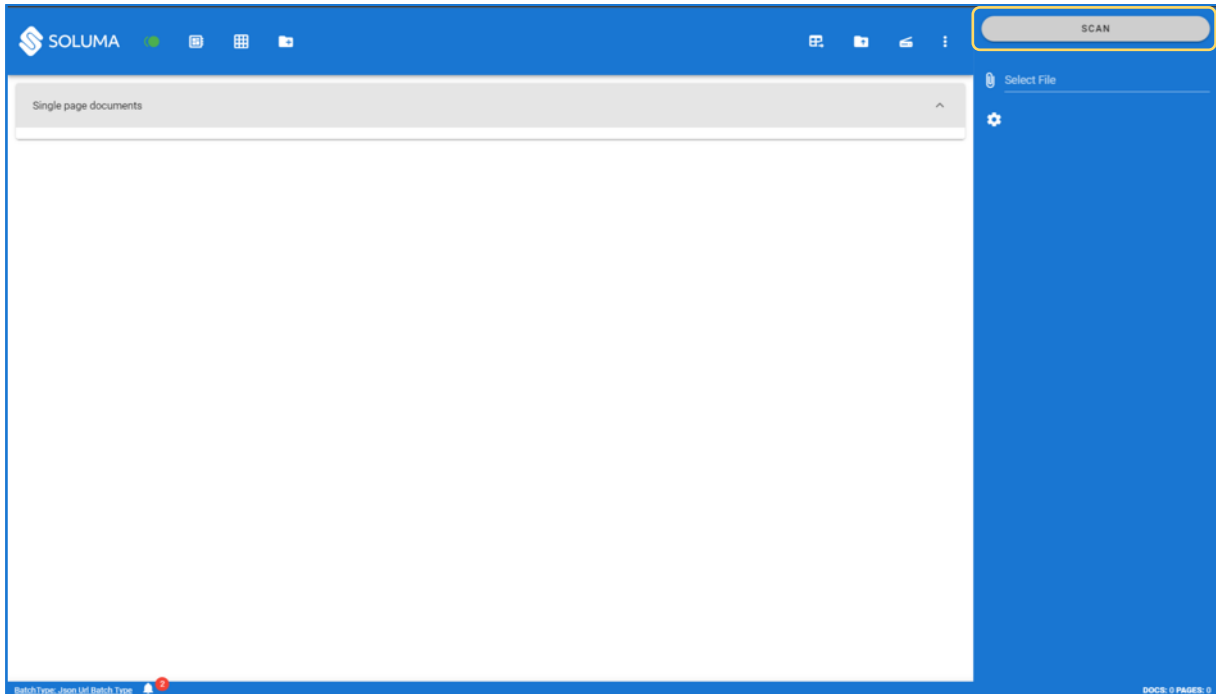
Size = Set the size of the paper to be loaded.

Duplex = Allows duplex scanning.

Refresh = This button is useful if you do not see your device listed in the list of devices. With refresh, your device will appear in the list.

Driver Settings = Once a device is selected, this button is activated where you can check the driver of your device.
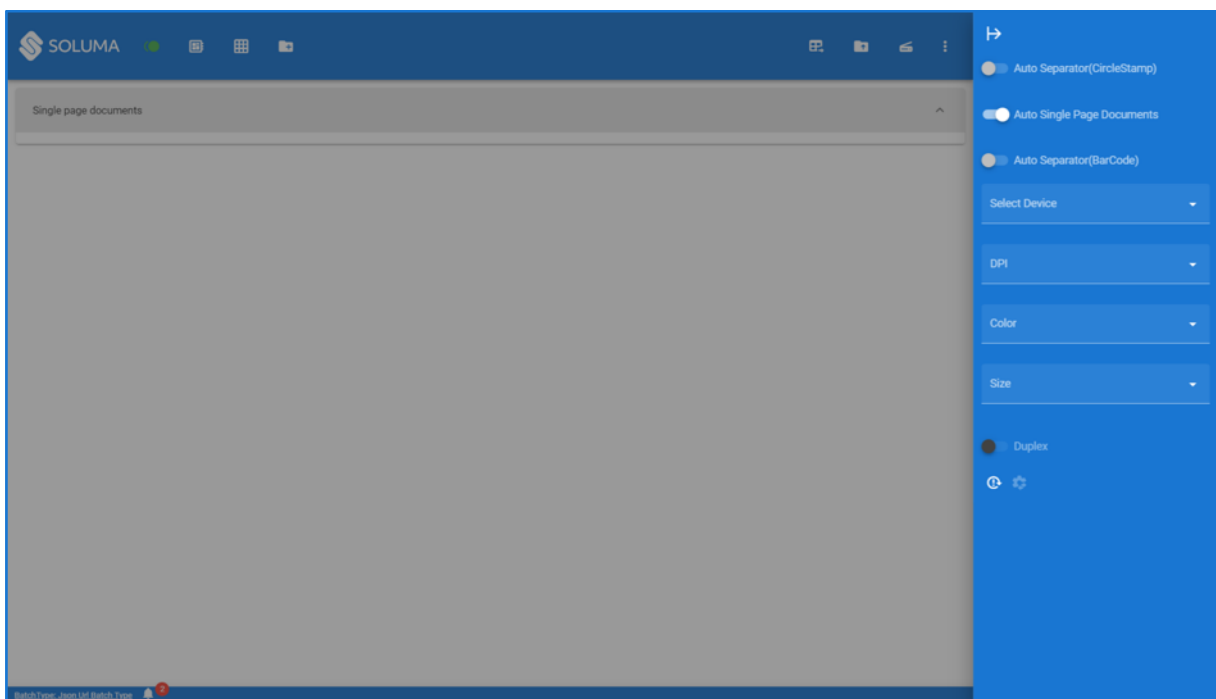
Picture 7: Settings

*Picture 8: Scan button that initiates scanning documents*

Documents can be uploaded in two ways, via the Scan dialog box or with Drag and Drop.

## Procedure for uploading documents through the dialog:

Open the scanner icon named Scan (Picture 8).

In the open field there is an icon in the form of a clip (Picture 9) which if pressed will open your computer's File Explorer dialog box, where you can select any number of documents.
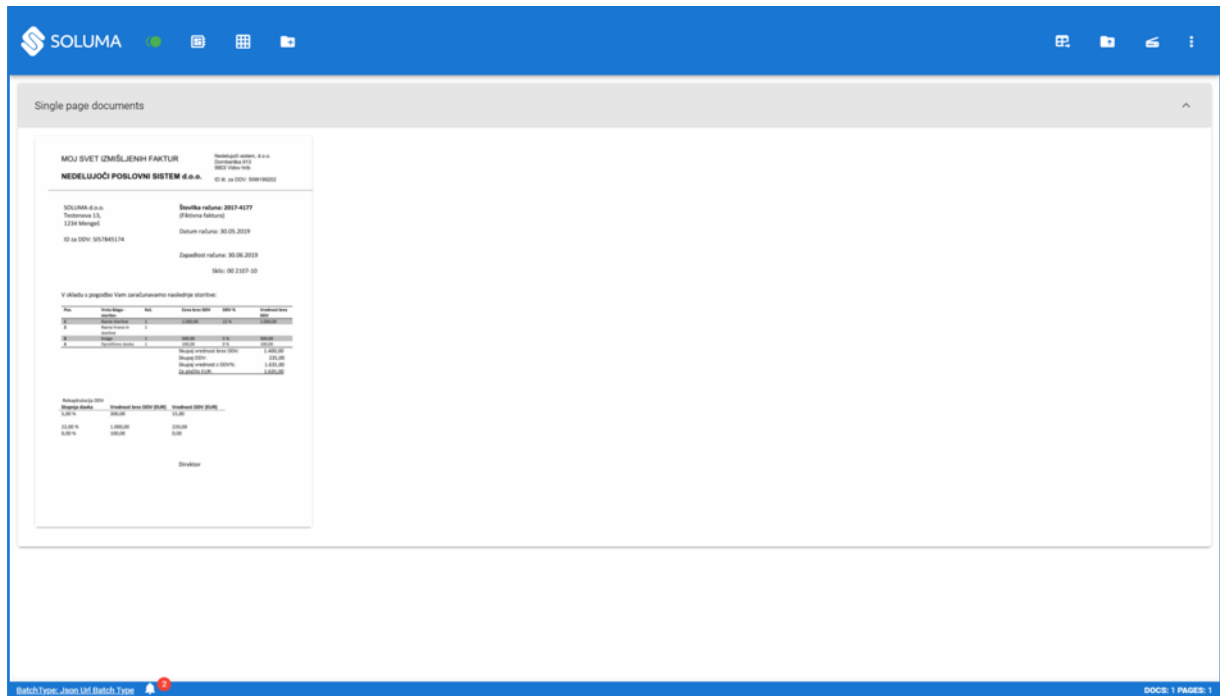
When you have selected all the documents, click OK in the dialog box and the Scan icon (Picture 10).
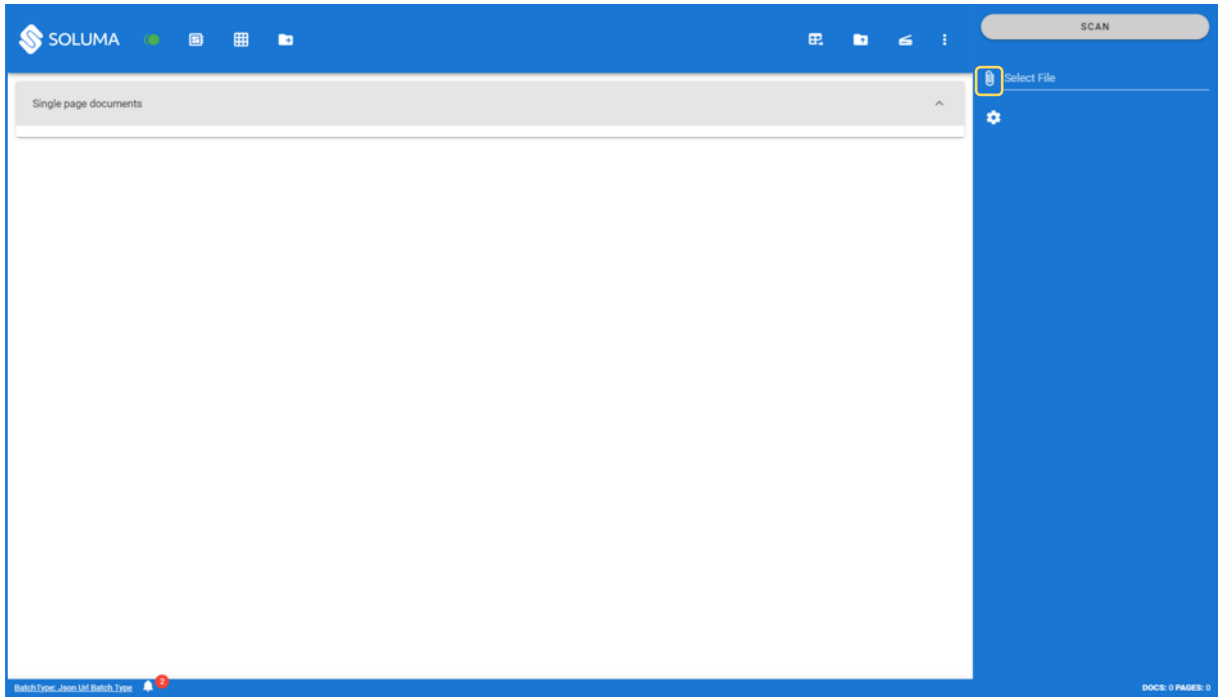
Picture 9: Select file
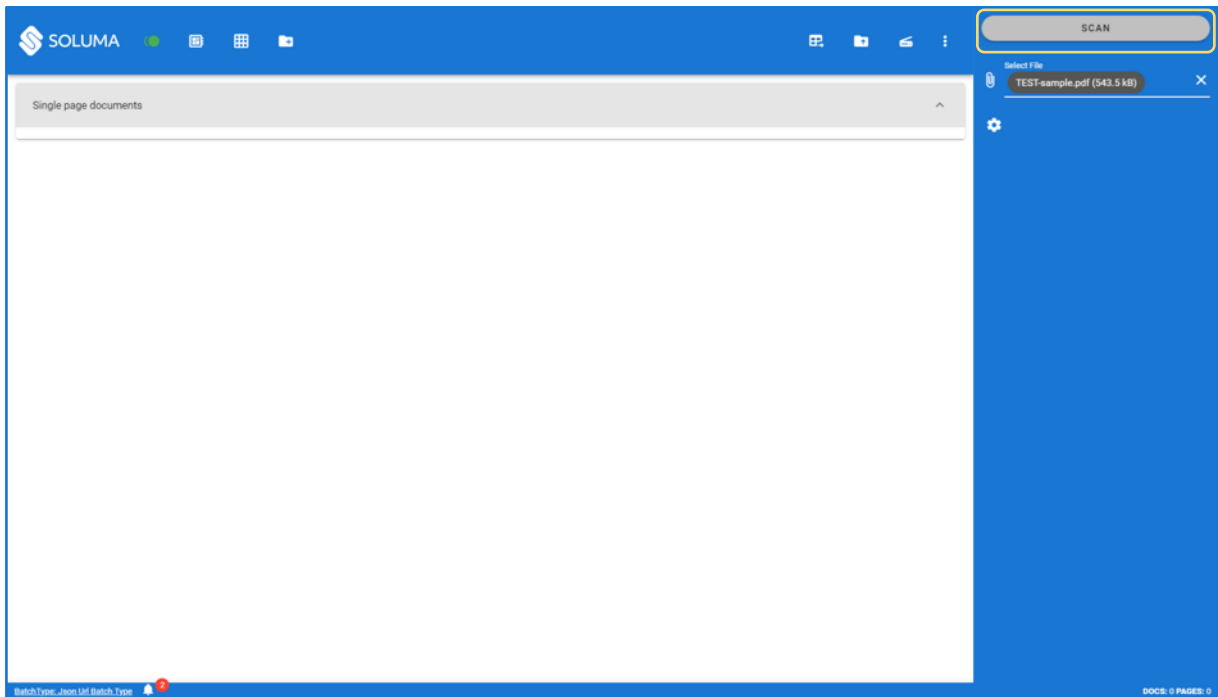
Picture 10: Scan icon with which we select the desired file
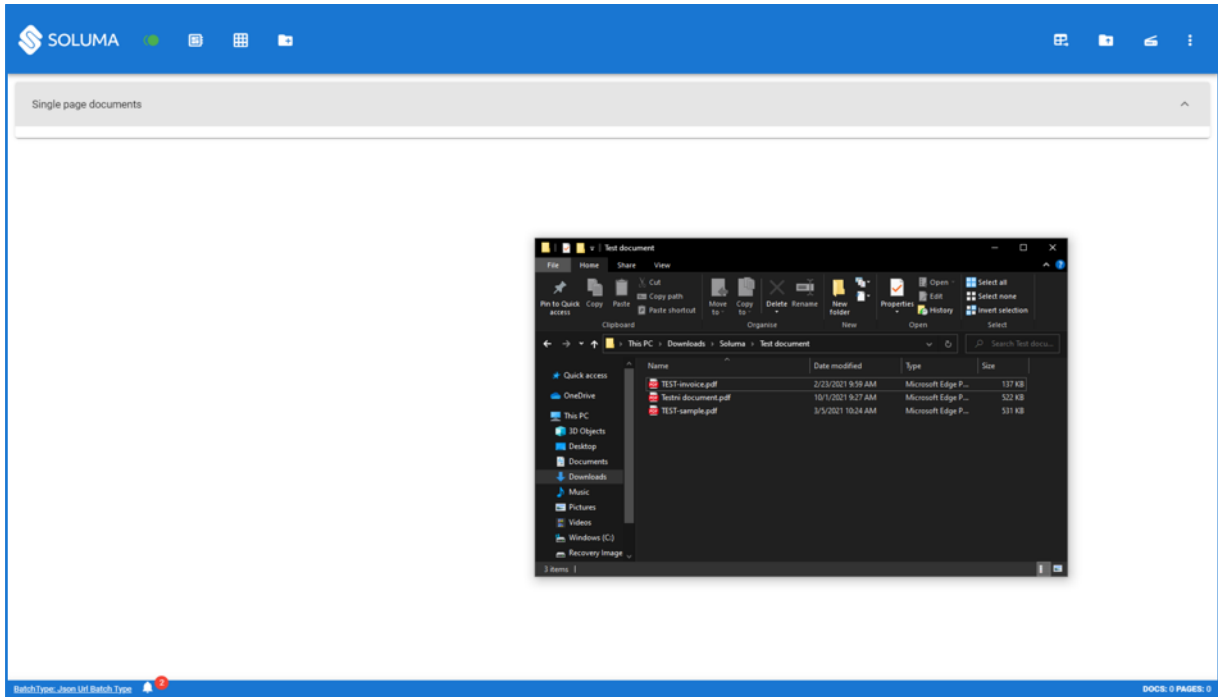
Picture 11: Newly formed dokument

Drag and drop document upload process:

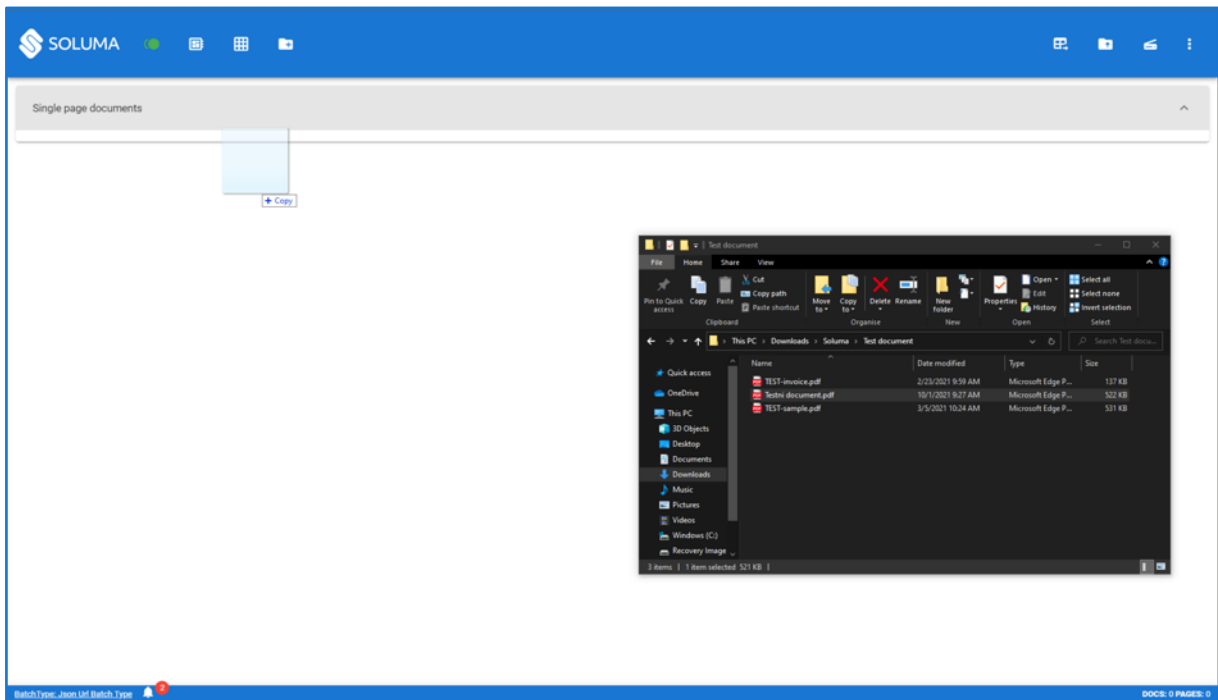Open the file explorer (Picture 12).

Select the document you want to upload.

Click on the document, drag, and drop it into the application (Picture 13).

The document will appear in the application under the tab "Single page documents".

Picture 12: File explorer

Picture 13: Add the file using drag and drop

5. Classify documents

We classify documents for easier organization (contract, invoice, certificate ...). By right-clicking on the tab (Picture 14) where the created document is located, the classifications are displayed and it is selected by clicking on the desired classification. After assigning the classification, it is visible to the right of the tab name (Picture 15). When documents are exported, the documents are sorted according to the classification we have assigned to them. All the classes are imported from M-Files.
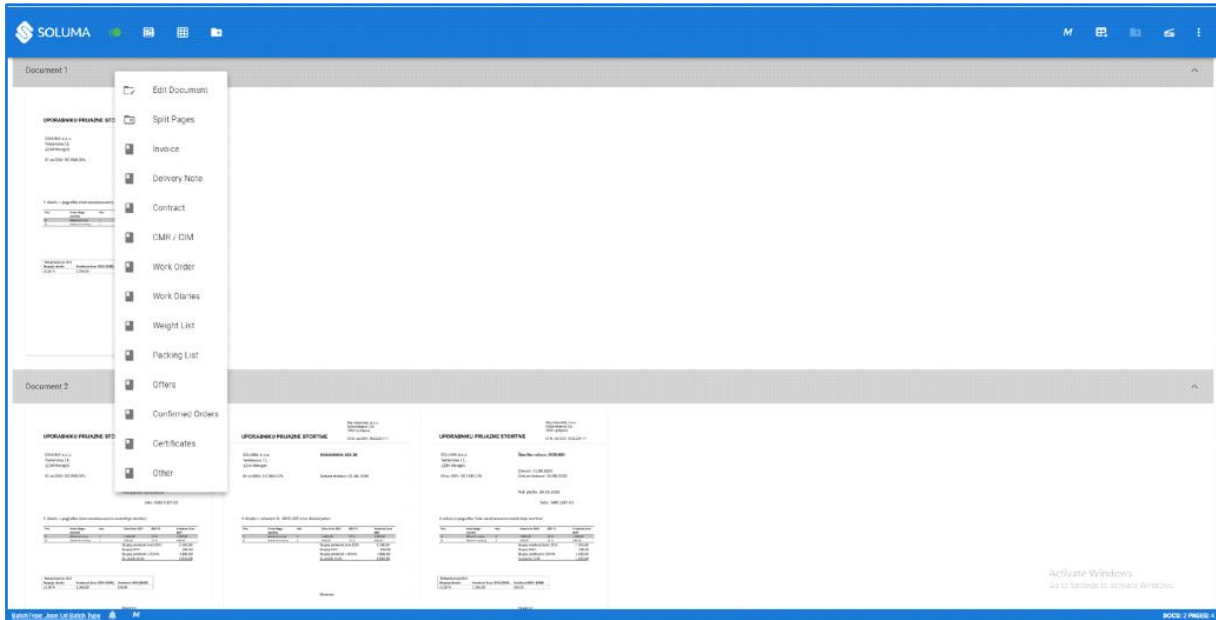
Picture 14: Right-click displays a drop-down menu of various classifications
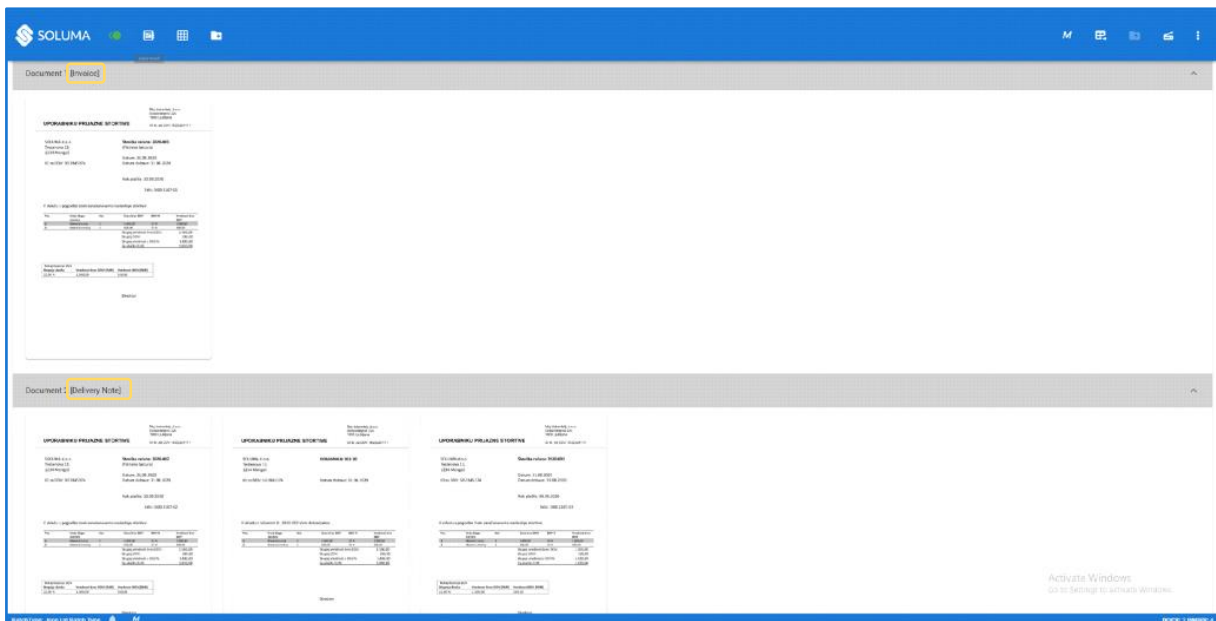
Picture 15: Document classification example

6. Separating documents

Once the documents are uploaded into the batch, the document pages will be classified as one page documents, except if the settings are configured differently (4). You can separate them into different documents in several ways.
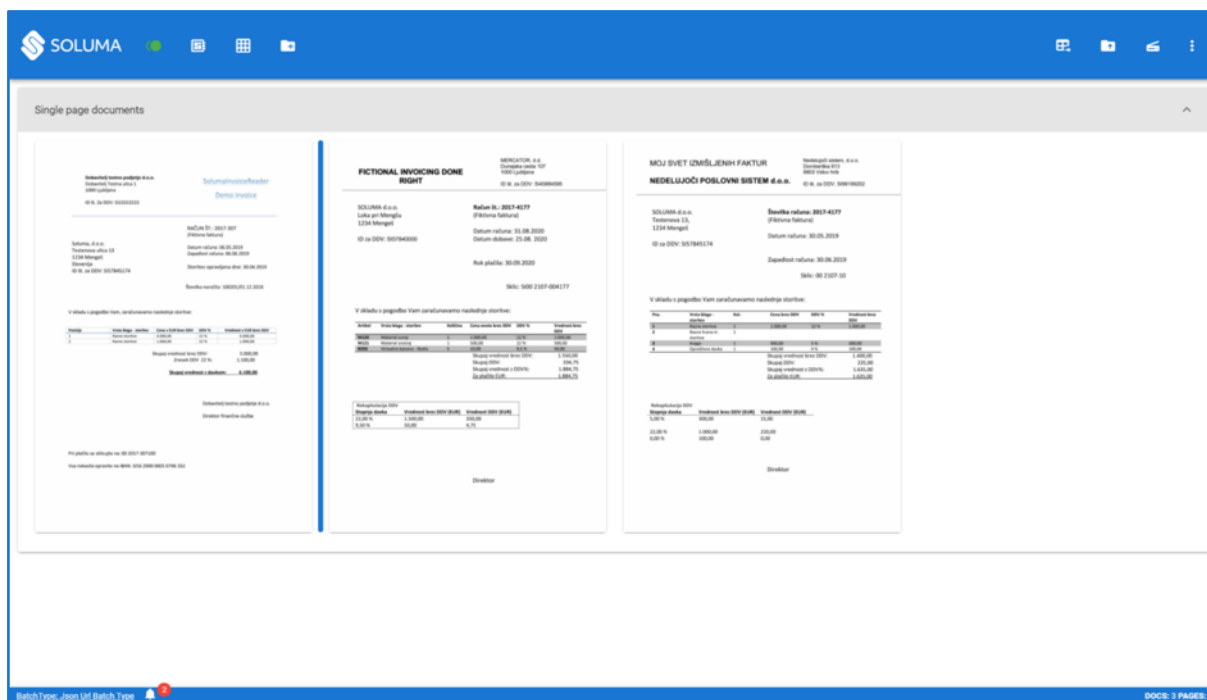
Via the blue tab

The blue tab appears if you hover your mouse over the right edge of the page and the pages can be separated by simply clicking on the tab (Picture 16).
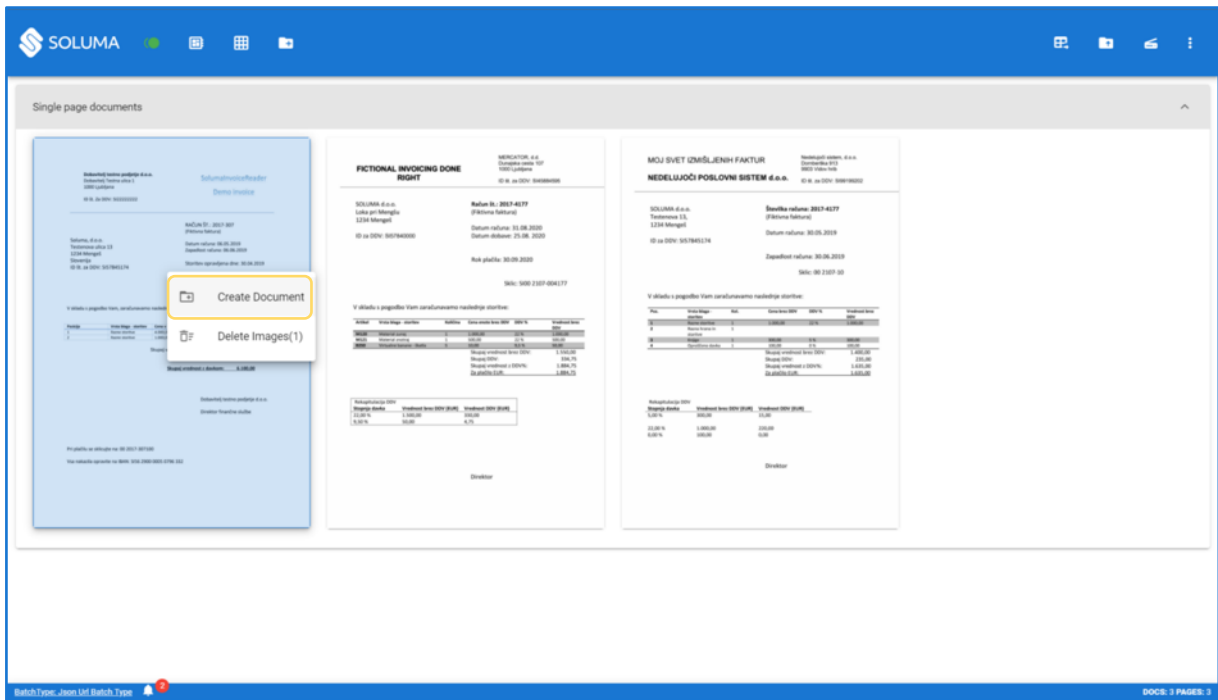
Right Click

Another way to separate documents is by right-clicking. Select the document you want to separate, right-click and select the 'Create Document' field (Picture 17).
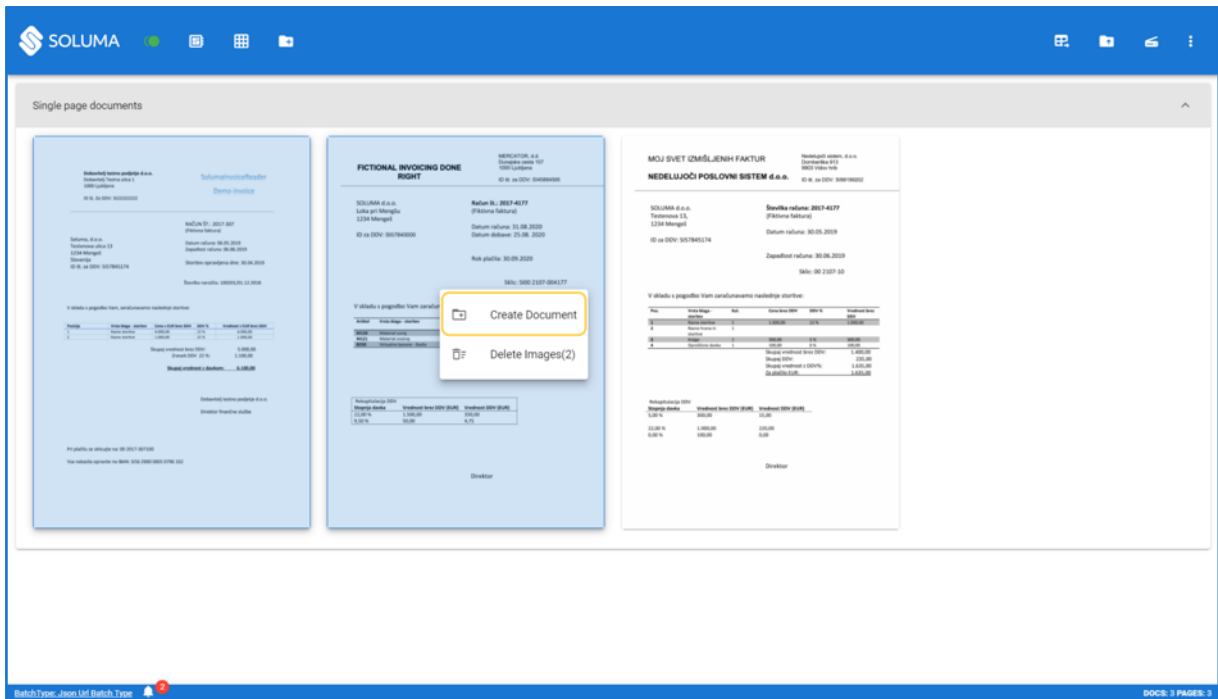
Creating a multi-page document

If you want to separate a multi-page document in this way, click on the desired page, press and hold the 'Shift' key while right-clicking on the back of the document (Picture 18).
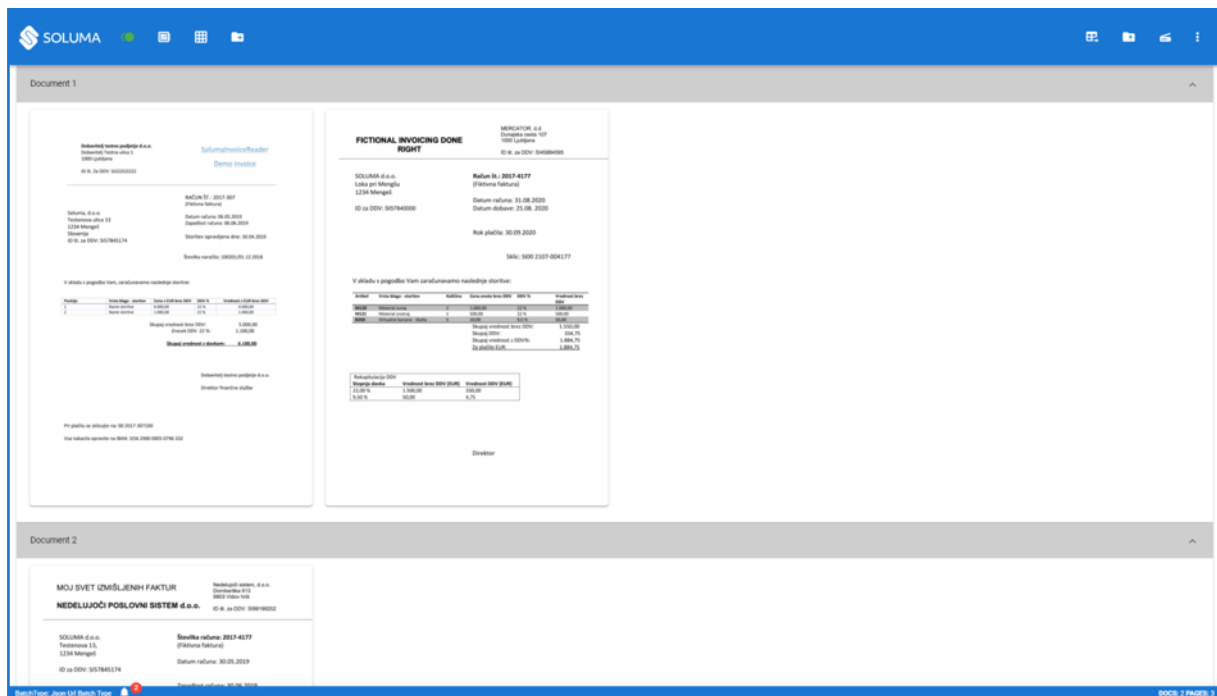

Picture 16: Separation via the blue tab

Picture 17: Separation via right-clicking

Picture 18: Creating a multi-page document

*Picture 19: Example of a separated document*

7. Editing Documents

You can edit both individual pages of documents as well as documents as a whole.
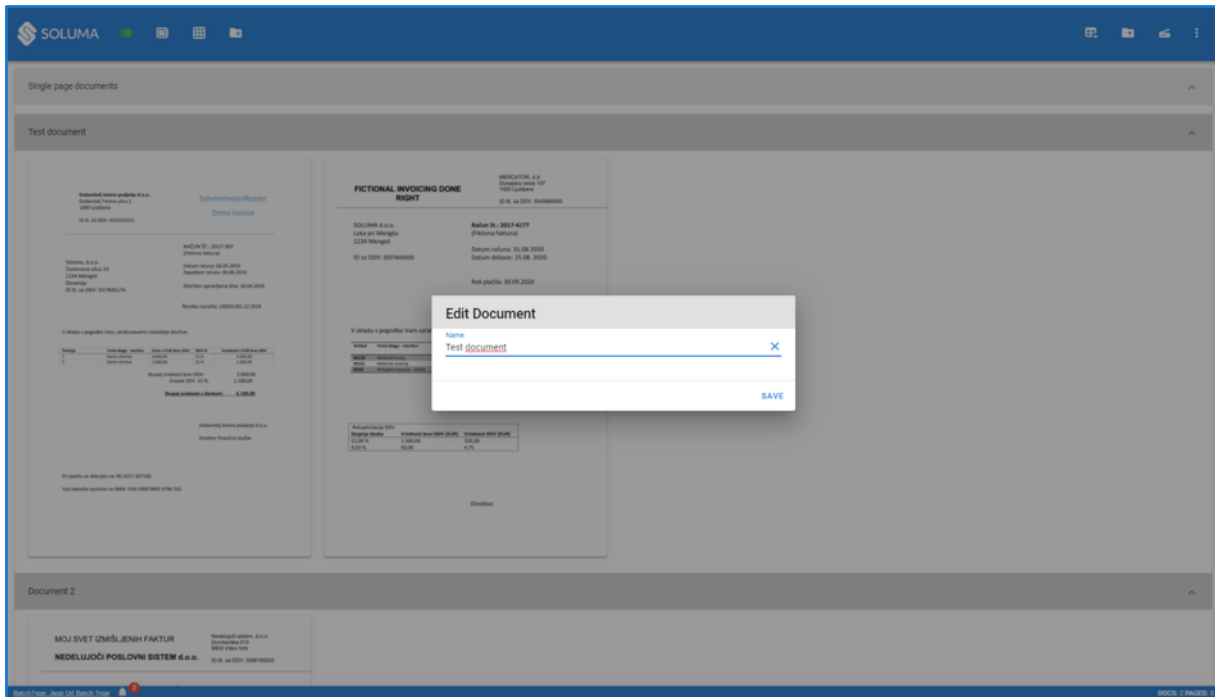
Editing documents (Picture 20)

Right-clicking on the dark gray bar displays the 'Edit Document' feature (Picture 21), which allows you to rename an individual document, and the 'Split Pages' feature allows you to change pages in the document to one-sided documents.
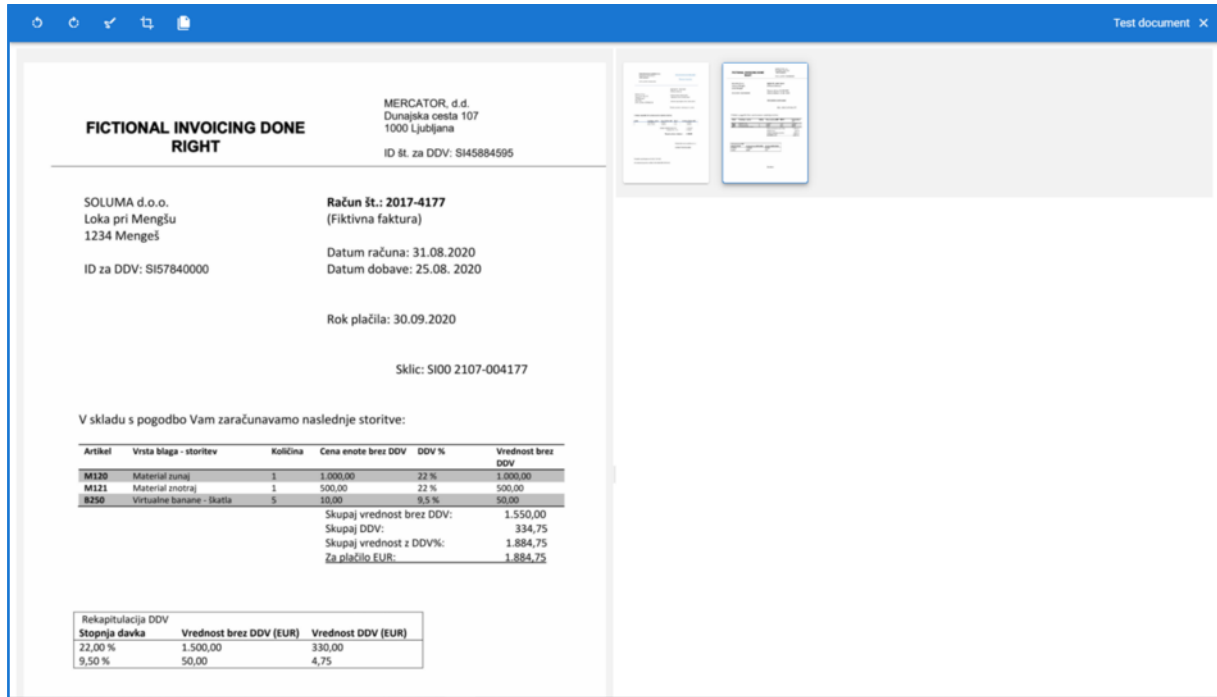
Editing individual pages

Editing an individual page of a document can be done by first double-clicking on the selected page. A new window will appear that allows you to rotate and draw on the page, where you can hide sensitive data that you do not want to remain visible and crop the page. This comes in handy if the page contains several different accounts which can be separated on different pages. When you are satisfied with the changes, save them (Picture 22). Also by right-clicking on a page, you can delete the image, remove it from the document, create a new document or move pages from a multi-page document to one page documents.
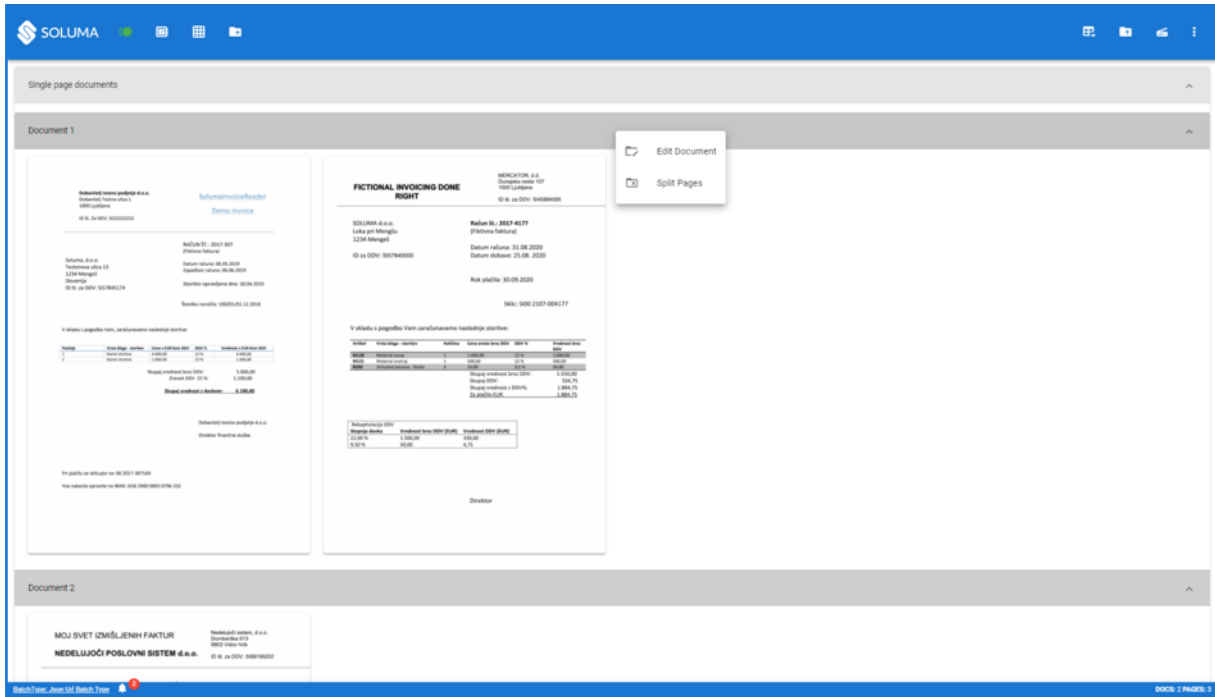
Picture 20: Document editing

Picture 21: Naming a document

Picture 22: Editor

Insight into the possibilities of editing each page and what they mean

Create Document = Allows us to create a new document from this individual page.

Split pages = This feature allows you to return all the pages you have divided into this particular document back to single-sided documents.

**Exclude from document =** The page you selected can be excluded from the document.

Delete images = The page can be deleted from the package.
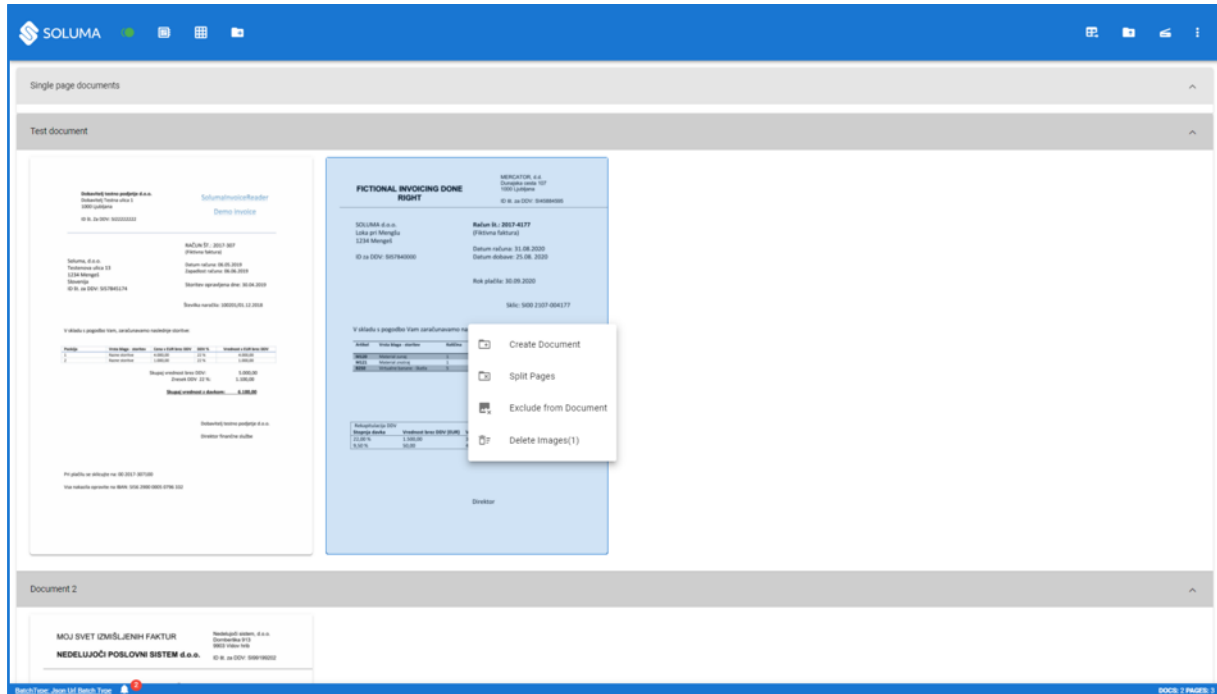
Picture 23: Editing options

8. Export of documents

Once the documents have been properly arranged and edited, they are ready for export to M-Files. Export the document by simply clicking on the 'Export to M-Files' button (**Error! Reference source not found.**). If you do not want to send the documents to M-Files, you can also export them to your computer. Click on the 'Batch export' field (Picture 25) and select where you want to export the documents.
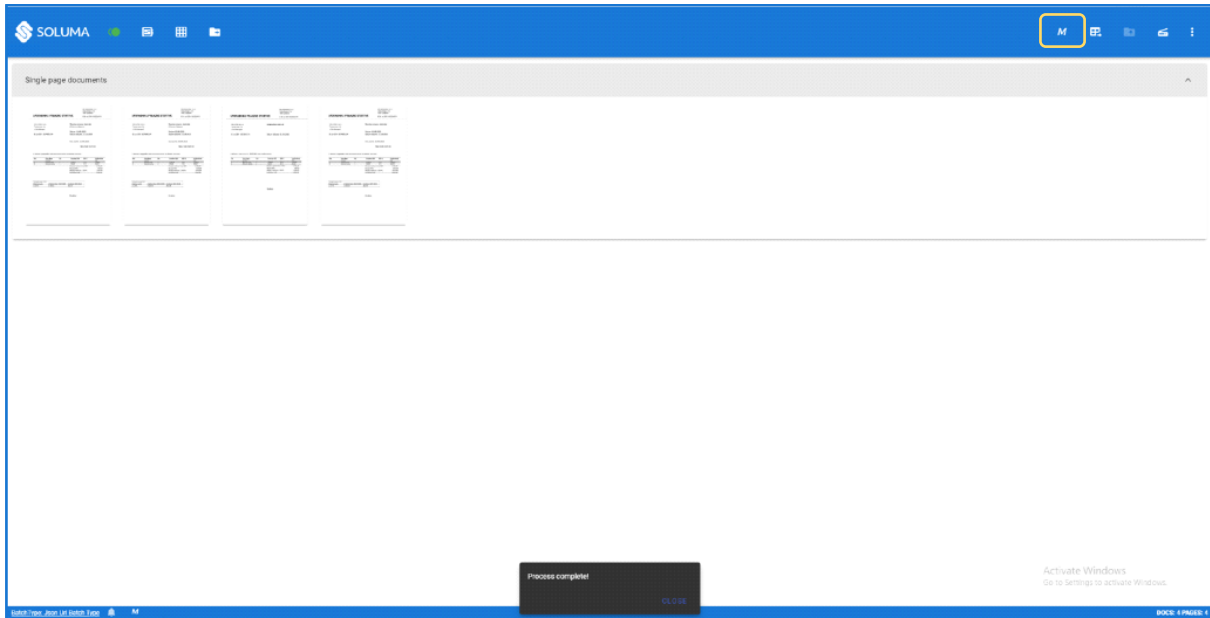
Picture 24: Succesfuly uploaded document

*Picture 25: Export batch*

9. Language Settings

Soluma WebScan supports 7 different languages which are easily changed.

This is done by opening the drop-down menu in the upper right corner of the toolbar where the administration field is located (Picture 26).
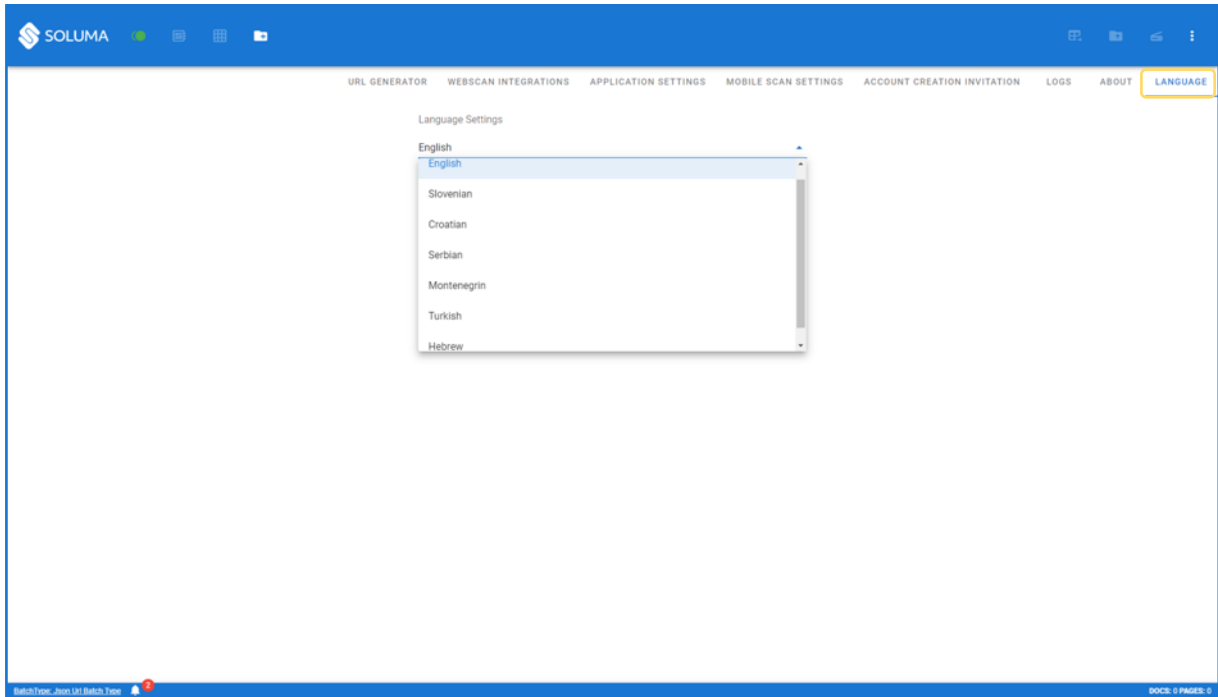
When you open the field, a new toolbar appears in which you open the Language field, then select whichever language is desired (Picture 27).

The following languages are supported by the application:

- English
- Slovene
- Croatian
- Serbian

- Turkish
- Hebrew
- Montenegrin
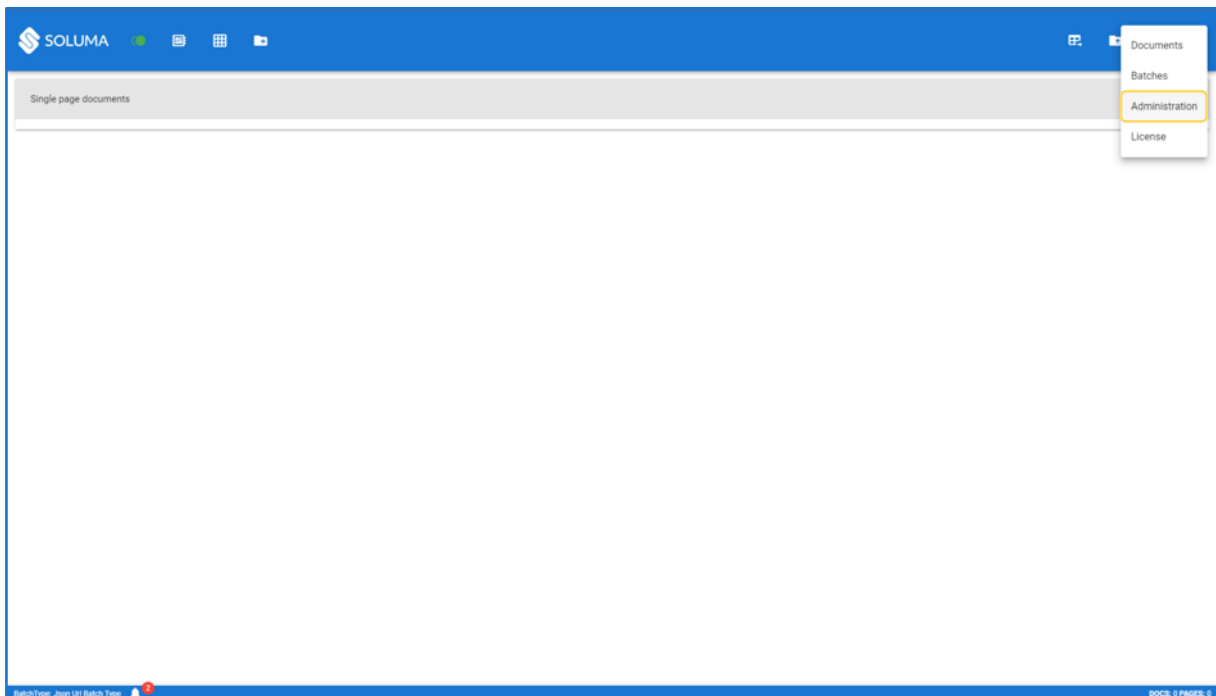
Picture 26: Dropdown menu > Administration

Picture 27: Language selection