

Webscan-Mfiles integration documentation

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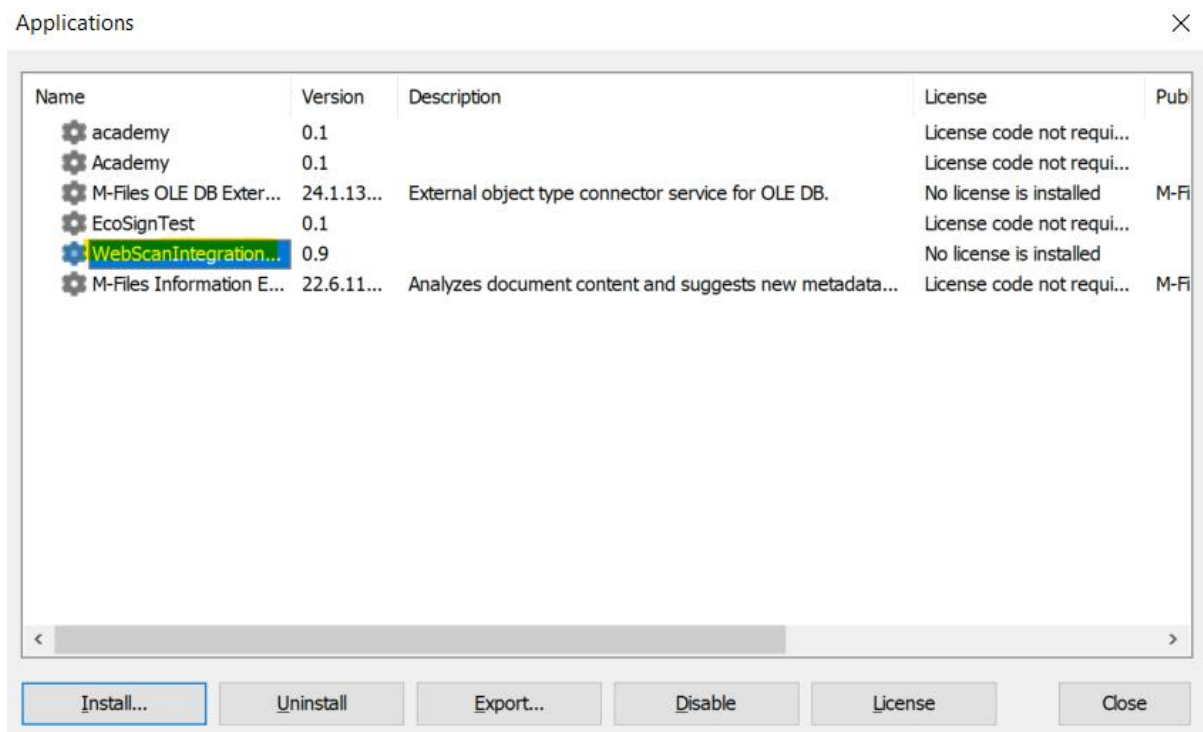
1. Introduction

Soluma WebScan is an application that allows you to scan, upload and manage your documents with ease. More about WebScan you can read in WebScan Usage Instructions. This document describes how to install WebScan and connect it with M-Files, how it works from M-Files perspective and how to use it.

2. Installation

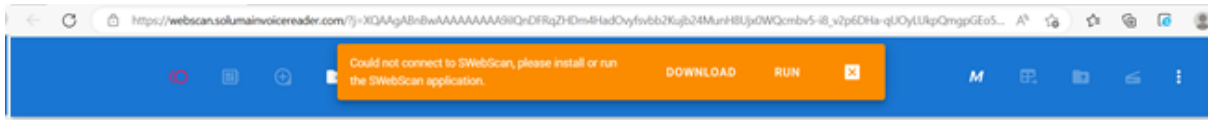
This sector is meant for M-Files administrator or person who has access to M-Files server. It describes how to install application, structure and how to set IIS.

Right click on vault name and select **Applications**. Select install and choose mfappx file you got. Close window and allow to restart vault. This will also install the UIX app after restart.



WebScan installation

When users will open WebScan link for the first time they will get possibility to download WebScan application. User will click download and follow the instructions. After installation user will be able to use WS.



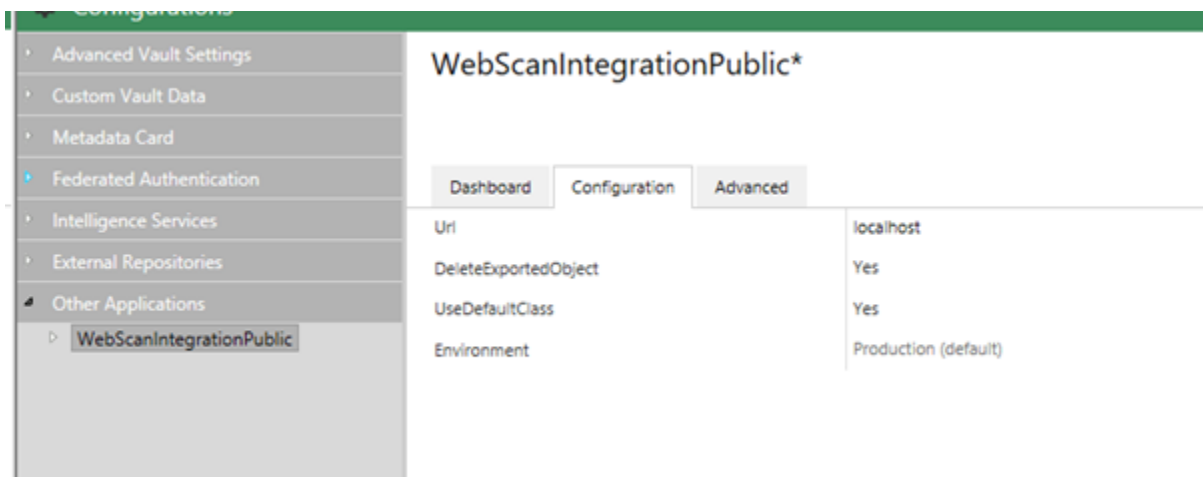
Authentication

Single Sign On

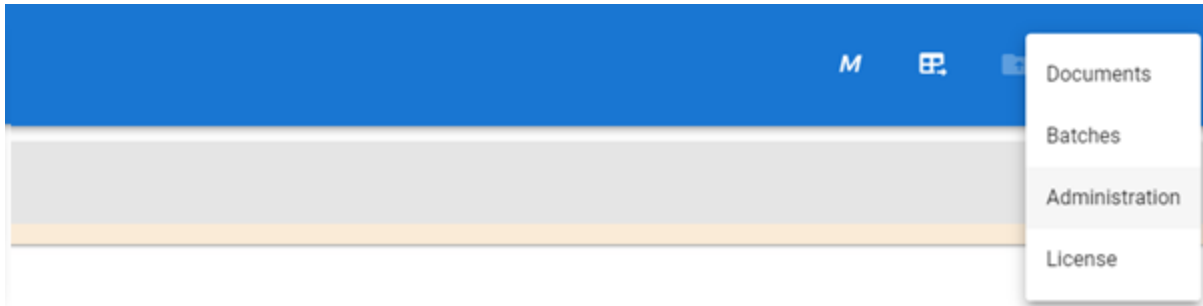
Users which have already made connection for M-Files Desktop client does not have to do anything else. WebScan will use those credentials.

Basic Authentication

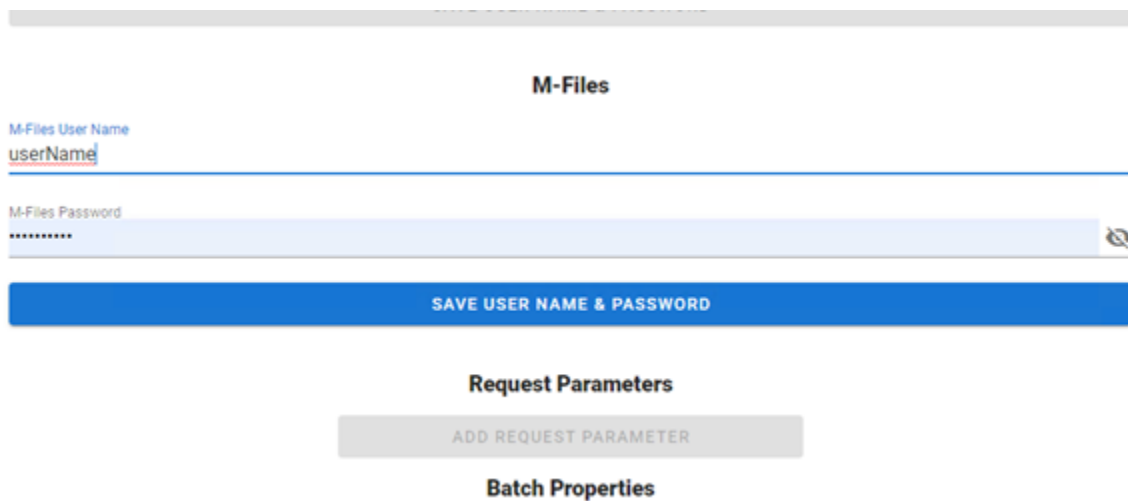
Users which do not have connection with M-Files desktop client can set basic authentication. In M-Files Admin in application configuration admin must set url to M-Files server.



After that every user in M-Files enters their name and password.



In Administration under **WebScan Integrations** set username and password (M-Files).

A screenshot of the 'M-Files' configuration form. The form is titled 'M-Files' and contains two input fields: 'M-Files User Name' with the value 'userName' and 'M-Files Password' with a masked password '*****'. Below the password field is a blue button labeled 'SAVE USER NAME & PASSWORD'. Underneath the form is a section titled 'Request Parameters' with a gray button labeled 'ADD REQUEST PARAMETER'. At the bottom of the form is a section titled 'Batch Properties'.

After that user refresh browser and can start using WebScan.

3. WebScan Settings

WebScanIntegrationPublic

Dashboard	Configuration	Advanced
<ul style="list-style-type: none"> ▷ Logging Configuration <ul style="list-style-type: none"> Environment i Production Url i http://localhost (default) Language i (not set) Create assignment on exported documents i No ▷ WebScan Configuration <ul style="list-style-type: none"> Automatic property settings (empty) WebScan open settings (not set) Edit with WebScan Import incoming post Users (1) 1 Item(s) 		

General Configuration

Environment

Select the environment for the system: Production for live usage, Test for testing purposes.

Url

Set the URL for WebScan.

Language

Choose the default language.

WebScan Configuration

Enabled

Enable or disable WebScan configuration. Not enabled will use a default configuration.

Class Options

Choose the available classification classes.

Default Classification Class

Default class when exported to M-files.

Searchable PDF

Determine if scanned documents should be made text-searchable.

WebScan Color

Select the color of the status bar.

Import Folder

Path to the folder from which WebScan will import.

Separator

Select the method for automatically separating documents during scanning.

Barcode Type

Choose the barcode type used for automatic separation.

Barcode Area

Specify the area where barcodes are expected for separation.

Barcode Direction

Set the expected direction of barcode reading for separation.

Barcode Regular Expression

Set the regular expression used for the barcode.

Mandatory Field Handling

Creates documents with mandatory fields with the is Template property attached which can be removed when the mandatory field is filled out.

Creation Dialog

Open dialogue when creating new documents from WebScan.

Create Assignment on Exported Documents

New documents exported via WebScan will be linked via assignment.

Required Classification

Determine if scanned documents must be classified before export.

Open with WebScan Configurations

Button Name

Button name for opening WebScan.

Show Only to User Groups

UI changes will only be visible after re-logging into the M-Files vault.

Custom WebScan Configurations

If enabled, it will override global/default settings of WebScan.

Edit with WebScan Configurations

Button Name

Button name for editing with WebScan.

Show Only to User Groups

UI changes will only be visible after re-logging into the M-Files vault.

Custom WebScan Configurations

If enabled, it will override global/default settings of WebScan.

Multi select document Configurations

Button Name

Button name for Multi select documents.

Search Conditions

Choose the search filter used to find documents within vault for WebScan to collect.

Successful Import Check

Only objects with the property set to NO will be imported. After import, the property is set to YES.

Show Only to User Groups

UI changes will only be visible after re-logging into the M-Files vault.

Relation Property on New Object

Select the property definition that will hold a relation to the original document on the new object.

Relation Property on Original Object

Select the property definition that will hold a relation to the new document on the original object.

Convert to Multi-file Document

Determine if the document is transformed into a multi-file document post-export.

Custom WebScan Configurations

If enabled, it will override global/default settings of WebScan.

Automatic Property Configurations (WebScan on Object)

Delete Exported Object

Determine if you would like to delete the object once it's exported to M-Files.

Use Default Class

Determine if the default class is used when no other class has been assigned.

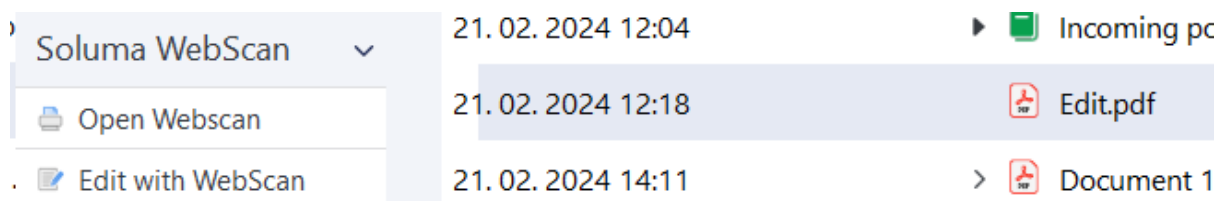
4. Open WebScan

The "Open WebScan" method provides users with a convenient button within the interface. When clicked, this button opens up the WebScan tab, allowing users to interact with the WebScan functionality directly within the application. This method streamlines the process of importing documents into WebScan for scanning and further processing.



5. Edit with WebScan

The "Edit with WebScan" method empowers users to seamlessly edit selected objects within M-Files by leveraging the advanced editing capabilities of WebScan. This method allows users to select one or multiple objects within M-Files and load them directly into WebScan for comprehensive editing. Once loaded, users can perform various editing actions such as reordering pages, creating new documents from snippets, rotating pages, censoring sensitive data, creating new documents from existing ones, and merging documents.



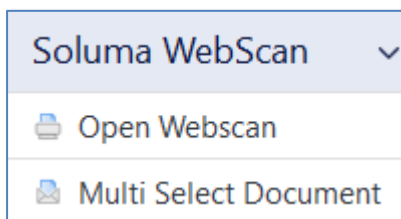
Class-Based Configuration for Editing with WebScan

This functionality allows users to specify different WebScan configurations based on the class of the selected object within M-Files. By defining settings tailored to each class.

6. Multi select document configuration

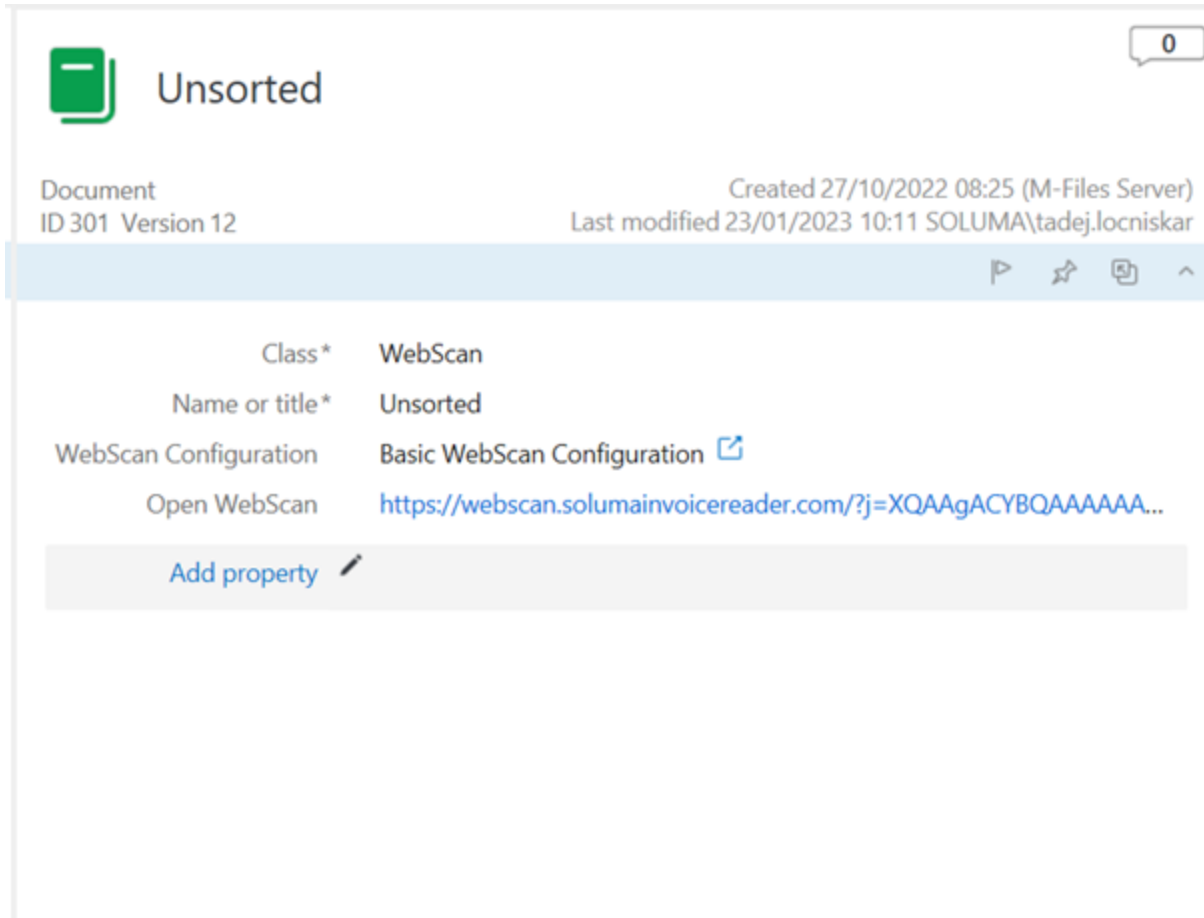
The Multi Select Document Configuration feature provides users with a convenient way to import documents into WebScan based on predefined criteria. By setting a specific class and property with a boolean value (Yes/No), users can initiate the process to load all objects of the designated class with the property set to "No" into WebScan for further processing. This method streamlines the workflow for handling incoming documents, allowing users to efficiently manage and process them within the WebScan environment.

Furthermore, users can create multiple configurations to accommodate different sets of documents, enabling efficient handling of various document types within WebScan.





7. WebScan on Object

The "WebScan on Object" method uses global WebScan setting and calculate the URL within a property (**PD.OpenWebScan**). It opens all documents within the Multifile document object.



The screenshot shows a document object in the M-Files interface. The object is named "Unsorted" and is of class "WebScan". It has a "WebScan Configuration" property set to "Basic WebScan Configuration" and an "Open WebScan" property with a URL: <https://webscan.solumainvoicereader.com/?j=XQAAgACYBQAAAAAA...>. The document ID is 301, version 12, and it was created on 27/10/2022 and last modified on 23/01/2023.

Class*	WebScan
Name or title*	Unsorted
WebScan Configuration	Basic WebScan Configuration 
Open WebScan	https://webscan.solumainvoicereader.com/?j=XQAAgACYBQAAAAAA...

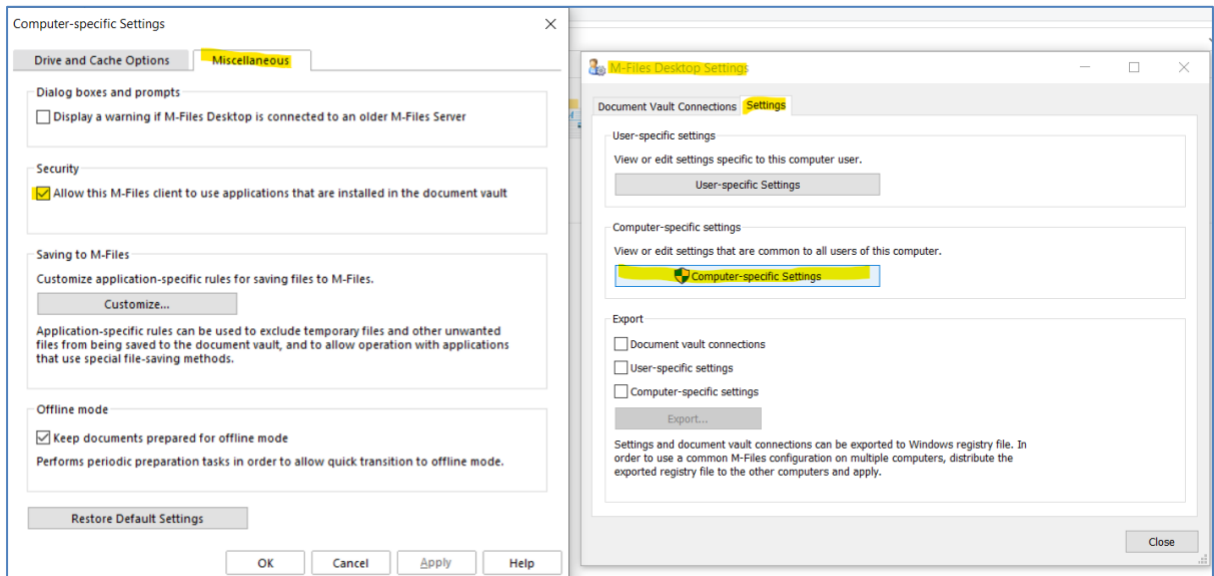
[Add property](#) 

Example of use: Multifile object in M-Files which is opened with webscan and separated and indexed in it.

8. FAQ

The buttons do not show?

Make sure to enable code execution in Mfiles desktop settings > settings > Computer specific settings > miscellaneous > security Check off and on.



Can't select File from multi-file document

Currently, the only way to modify multifile documents is via selecting the entire multifile document.