



Web Client Integration Tool
Quick Start Guide
Platform Services Version

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J&H, Inc. 2017

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Web Client Integration Tool
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Web Client Integration Tool Quick Start Guide

Preface

This manual describes basic information to use the Web Client Integration Tool module.

What is Web Client Integration Tool?

This suite of software products enhances the functionality of the DocuWare Integrated Document Management system. The Web Client Integration Tool is designed to integrate searches in DocuWare with any third-party software application. This module allows users to select or OCR text from anywhere on the screen and search for the selected text in DocuWare.

Licensing

You must have a valid license file for the module that you are installing ([Contact us to find out how to obtain a license](#)). This license should be placed in a **License** folder that you've created in the DocuWare directory or under the C:\ root drive on the local machine. If you receive a license file with a .zip extension, place the .zip in the license folder and double click to extract the license file.

Installation

Download Web Client Integration Tool from the StapleWare website at www.stapleware.com. Open the **Web Client Integration Tool.zip** or Web Client Integration Tool.zip setup utility. Double-click the **WebClientIntegrationSetup_v.*.msi** and run the program from its current location. The install wizard will lead you through the setup process.

Note: If you're running this software and this installation is an upgrade - Please close the program and uninstall the program before running this upgrade.



Installation - Licensing

If you are starting Web Client Integration Tool for the first time the following message will appear when Web Client Integration Tool is started.



Click the browse button and select the correct license file from Windows Explorer.



Getting Started with Web Client Integration Tool

Web Client Integration Tool can use any text on the screen to search for and display a document result list in the DocuWare Web Client. In the following screenshots a company name has been selected in a third party application. Once the assigned hotkey is pressed (ALT + F1) a result list of documents with the company name is displayed in the DocuWare Web Client

1: Highlight text
2: Press hotkey (ALT + F1)

StapleWare - Standard List View Result Dialog

Type	Company	DocType	Invoice #	Date	Cost	Notes
PDF	Attractive Telephone Co.	1	PO1016	05/08/2015	22.75	Attractive Teleph..
PDF	Attractive Telephone Co.	1	PO1013	05/08/2015	419.80	Attractive Teleph..
PDF	Attractive Telephone Co.	1	PO1006	05/02/2014	1,838.00	Attractive Teleph..

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Starting Web Client Integration Tool

Web Client Integration Tool runs in the Windows system tray and will automatically open every time the computer is logged in. It must be open for any integrations to work. When Web Client Integration Tool opens you will be presented with the DocuWare login screen. Enter the DocuWare server URL, Organization, and DocuWare login credentials, then click 'Connect'.

Web Client Integration Tool

Login Panel Status Panel

DocuWare Login

Windows Login
 DocuWare Login

Server:

Organization:

Username:

Password:

Remember Login

Connect

Please enter your login credentials and click the connect button

StapleWare J&H

From the menu tree you can configure Web Client Integrations. To create an integration either select the menu item and click the '+' button or right click the menu item and select the 'Add Integration' popup.

Web Client Integration Tool

Add new Web Client Integration

Login Panel Status Panel

DocuWare Connection Information

Username	admin
Organization	J & H Office Equipment, Inc.
Hostname	172.16.204.103

Web Client Integrations



Connecting to DocuWare Cloud

Web Client Integration Tool works with DocuWare Cloud. Enter the DocuWare Cloud server URL, Organization, and DocuWare Cloud login credentials, then click 'Connect'. These credentials are the same as the credentials for the DocuWare Cloud Web Client.

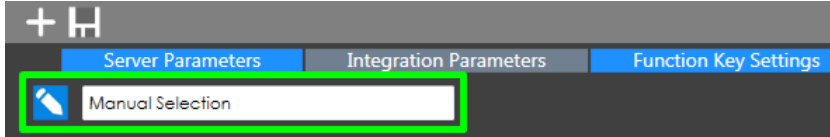
A screenshot of the DocuWare Login interface. At the top, there are two tabs: 'Login Panel' (selected) and 'Status Panel'. The main heading is 'DocuWare Login'. Below this, there are two radio buttons: 'Windows Login' (unchecked) and 'DocuWare Login' (checked). The form fields are: 'Server' with the value 'https://jho.docuware.cloud/docuware/platform'; 'Organization' with a dropdown menu showing 'J & H Office Equipment, Inc.'; 'Username' with the value 'admin'; and 'Password' with masked characters '.....'. There is also a checked 'Remember Login' checkbox. A blue 'Connect' button is centered below the fields. At the bottom, a message reads: 'Please enter your login credentials and click the connect button'.



Web Client Integration Configuration – Manual Select

Setup

- 1) Create a new web client integration configuration by right clicking on the 'Web Client Integration' menu item and selecting 'New Web Integration'
- 2) Click the Edit (pencil button) to name the web client integration



Server Parameters

- 1) **Protocol** – Choose HTTP or HTTPS protocol for the integration link
- 2) **Server Name** – URI for the DocuWare Web Client (the DocuWare server URL)
- 3) **Organization ID** – The ID number of your organization
- 4) **Credentials** – Select Windows Login for NTLM authentication and DocuWare Login to enter a username and password. NTLM authentication will use the Windows credentials of the user that is currently logged into the computer.

Web Client Integration Tool

Server Parameters Integration Parameters Function Key Settings Field Filters

Manual Selection

Protocol http https

Server Name (ex: localhost/docuware/platform/webclient)
172.16.204.103/docuware/platform/webclient * Required

Organization ID
1 * Required

No Login
Credentials * Required

Windows Login
 DocuWare Login

Username
admin * Required

Password
***** * Required

Next

Click 'Next' to move to the 'Integration Parameters' tab.



Integration Parameters

- 5) **Viewer Option** – Configure how documents will be displayed for a Search integration. ‘Result List and Viewer’ will display a result list of documents with the option to open and view the documents. ‘Use Viewer’ will display a single document only.
- 6) **Search GUID** – Select ‘Result List’ if the Viewer Option is ‘Result List and Viewer’. Select ‘File Cabinet’ if the Viewer Option is ‘Use Viewer’.
- 7) **File Cabinet** – Choose the correct file cabinet to search for documents in.
- 8) **Result List** – Choose the correct dialog for the file cabinet. NOTE: If you select ‘Use Viewer’ for the Viewer Option, the Result List will be ‘Search Dialog’.

The screenshot shows the 'Integration Parameters' tab in the 'Web Client Integration Tool'. The 'Manual Selection' section is active. The settings are as follows:

Field	Value	Requirement
Viewer Option	<input checked="" type="checkbox"/> Result List and Viewer <input type="checkbox"/> Use Viewer	
Search GUID	<input checked="" type="checkbox"/> File Cabinet <input type="checkbox"/> Result List	
File Cabinet	StapleWare	* Required
Result List	Modified Standard Result	* Required
Test DocId		* Required For Testing

At the bottom right, there are 'Previous' and 'Next' buttons. A message at the bottom left says 'Please select required fields'.

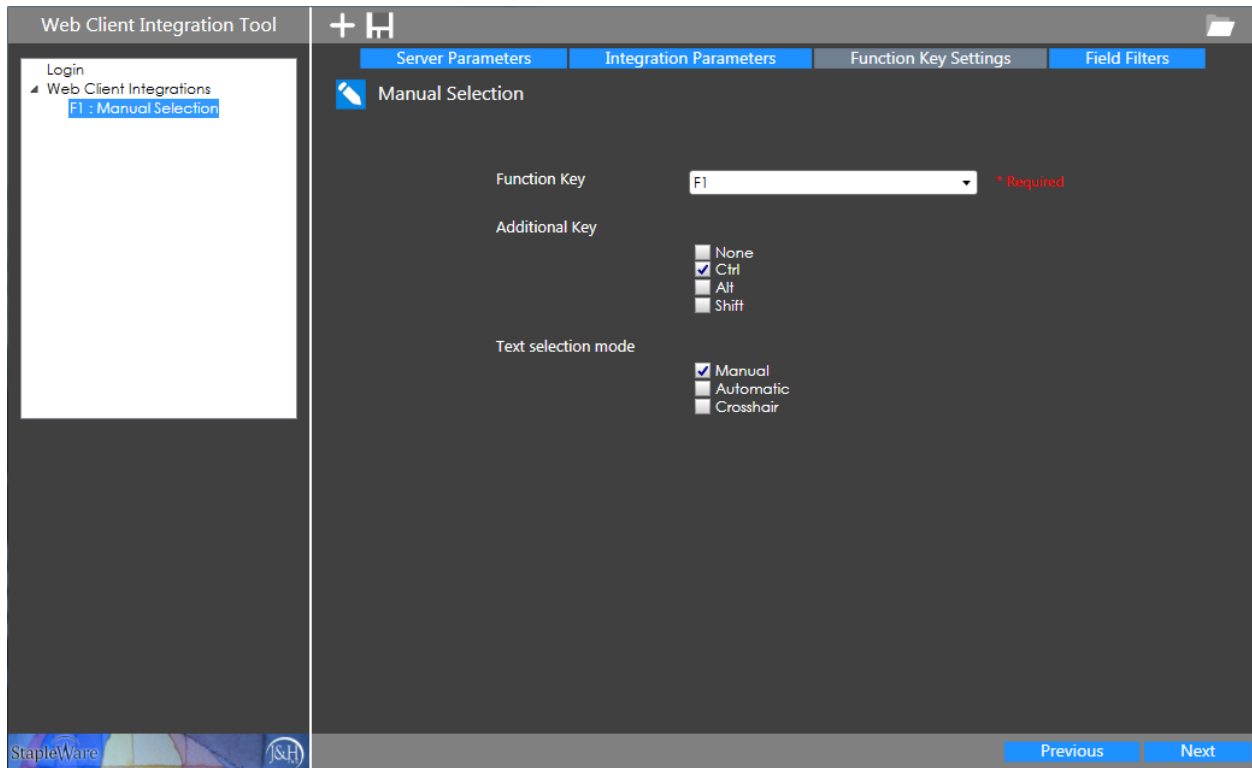
Click ‘Next’ to move to the ‘Function Key Settings’ tab.

Function Key Settings

- 9) **Function Key** – Assign a function key (F1 – F12) to use as hotkey for executing the integration.
- 10) **Additional Key** – Assign an additional key to be pressed in combination with the Function Key for executing the integration.
- 11) **Text selection mode** – Define how text will be read from the screen:
 - a. **Manual** – Manually select text with the mouse cursor



- b. **Automatic** – Place mouse cursor in front of text. The integration will automatically select the text to the right of the mouse cursor.
- c. **Crosshair** – OCR text from the screen using a crosshair selection tool and dragging a box around the text to select it. NOTE: Use this option if the third party application does not allow copy to clipboard.



Click 'Next' to move to the 'Field Filters' tab.

Field Filters

- 12) **Mapped Fields** – Select one DocuWare field to map for text selection. The 'Mapped Field' checkbox must be checked to enable the field.
 - a. The selected mapped field can insert a wild card before and after the search value selected from the screen.
- 13) **Fixed Fields** – Fixed entries to search for in conjunction with the mapped field. The checkbox to the left of the field must be checked to enable the field.



Web Client Integration Tool

Server Parameters | Integration Parameters | Function Key Settings | Field Filters

Manual Selection

These are mapped fields. You may use only one mapped field. Check the mapped field checkbox to use the field

Target Field	Mapped Field	Entry
Change comment	<input type="checkbox"/>	
Version number	<input type="checkbox"/>	
Version status	<input type="checkbox"/>	
DocName	<input type="checkbox"/>	
Company	<input checked="" type="checkbox"/>	Insert wild card: <input checked="" type="checkbox"/> Before <input checked="" type="checkbox"/> After
Status	<input type="checkbox"/>	
DocType	<input type="checkbox"/>	
Invoice #	<input type="checkbox"/>	
SO #	<input type="checkbox"/>	

These are fixed fields. You may use as many fixed fields as you want. Check the left checkbox to use the field.

Target Field	Entry
<input type="checkbox"/> Change comment	
<input type="checkbox"/> Version number	
<input type="checkbox"/> Version status	
<input type="checkbox"/> DocName	
<input type="checkbox"/> Company	This is being used as a mapped field
<input checked="" type="checkbox"/> Status	NEW
<input type="checkbox"/> DocType	
<input type="checkbox"/> Invoice #	

Select required fields from Integration Parameters tab to populate grid

Previous Save

Click the 'Save' button to save the Web Client Integration

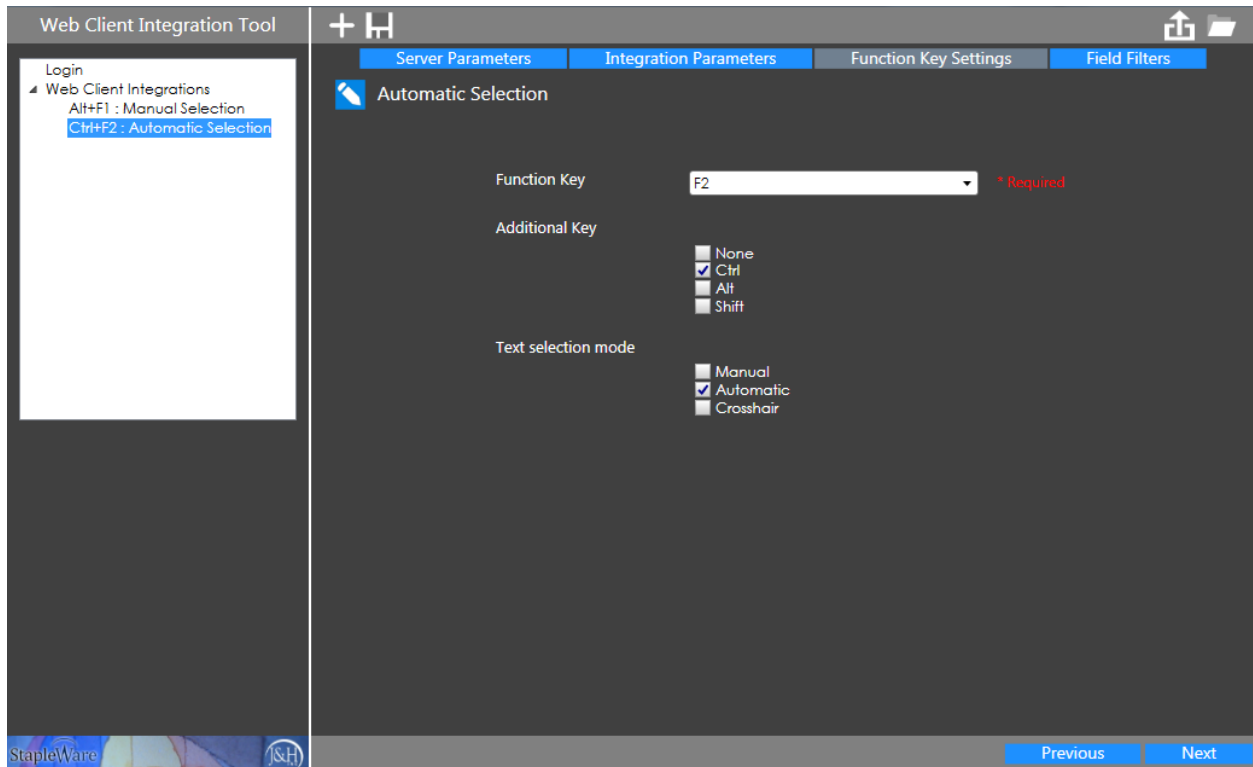


Web Client Integration Configuration – Automatic Select

Web Client Integrations can be configured to automatically select and search for text in front of a cursor.

Function Key Settings

Select 'Automatic' from the 'Text selection mode' list



Click 'Next' then 'Save' to save the Web Client Integration

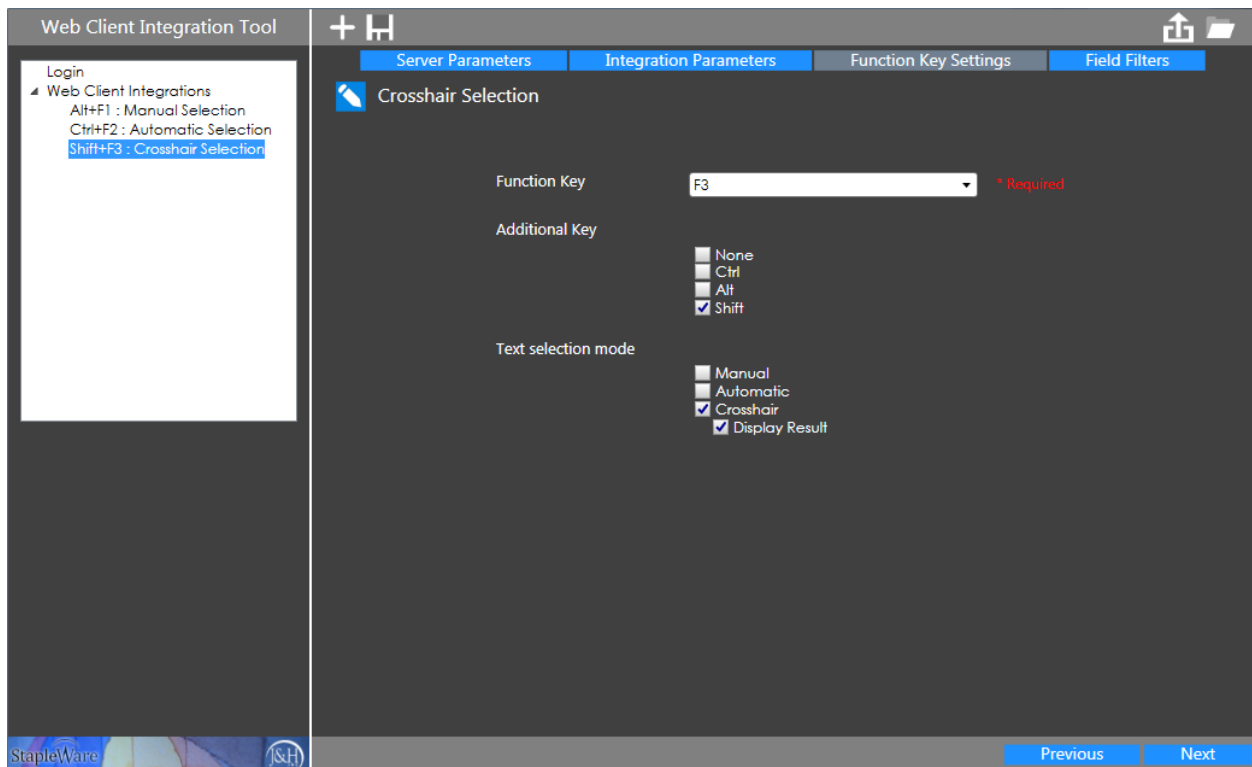


Web Client Integration Configuration – Crosshair (OCR)

Web Client Integrations can be configured to OCR text from anywhere on the screen.

Function Key Settings

Select 'Crosshair' from the 'Text selection mode' list. Select 'Display Result' to preview and edit the OCR results before searching for the text.



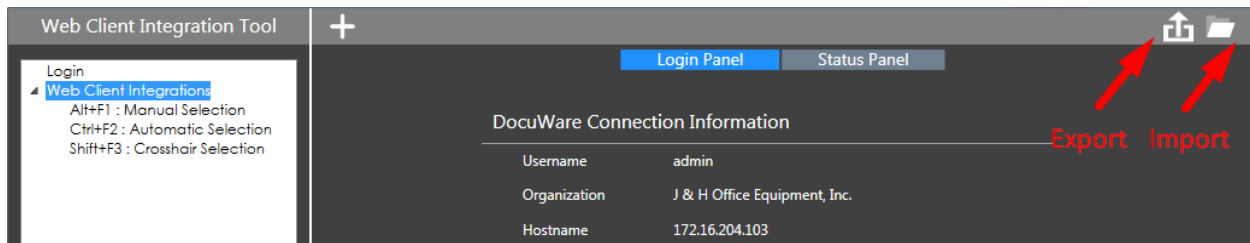
Click 'Next' then 'Save' to save the Web Client Integration



Export / Import Configurations

Web Client Integrations can be exported for import on other computers.

- 1) Export Web Client Integrations to an XML file by clicking the 'Export Integrations' button.
- 2) Import Web Client Integrations by clicking the 'Import Integrations' button, then opening the exported XML file.



Tray Icon

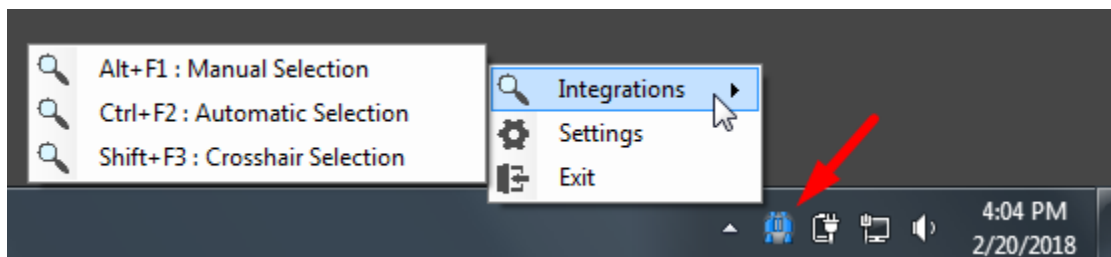
Closing the Dialog

Click the Red 'X' in the top right corner of the Web Client Integration Tool dialog to minimize the configuration dialog to the Windows system tray. The Web Client Integration Tool must be open in order to execute integrations.

Using the Tray Icon

Click the Web Client Integration Tool icon to access the tray icon menu.

- 1) **Exit** – Completely close Web Client Integration Tool. Integrations will be inactive until Web Client Integration Tool is started again.
- 2) **Settings** – Open the configuration dialog.
- 3) **Integrations** – Execute an integration by clicking on the name of the Integration in the sub menu.





Example

DocuWare Web Client View

The integrations in this example search for documents with COMPANY of 'Attractive Telephone Co.' and STATUS of 'NEW'.

DocuWare admin J & H Office Equipment, Inc.

Document trays Searches Tasks Documents - Folder

StapleWare - Field base type - Search

Type	Company	Status	Invoice #	Cost	Date	Notes	DocName
PDF	CRUGEREN0001	NEW	PO2020	180.50	02/26/2016	Cruger Engineeri...	Cruger PO2020
PDF	Fabrikam, Inc.	NEW	PO1014	0.00	05/08/2015	Fabrikam, Inc.	Fabrikam PO1014
PDF	ASSOCIAT0001	NEW	PO2074	28.46	04/12/2017	Associated Insur...	Associated PO2074
PDF	Attractive Telephone Co.	NEW	PO1016	22.75	05/08/2015	Attractive Teleph...	Attractive PO1060
PDF	Attractive Telephone Co.	NEW	PO1013	419.80	05/08/2015	Attractive Teleph...	Attractive PO1013
PDF	Attractive Telephone Co.	NEW	PO1006	1,838.00	05/02/2014	Attractive Teleph...	Attractive PO1006
PDF	Fabrikam, Inc.	NEW	PO1002	1,262.50	04/17/2014	Fabrikam, Inc.	Fabrikam PO1002
PDF	ADVANCED0001	NEW	PO0997	90.25	04/10/2014	Advanced Office ...	Advanced PO0997

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Manual Selection

Text is manually selected in a third party application by the user. When the assigned Function Keys are pressed, the search for the documents is executed.

Type: Standard Hold

PO Number: PO1006

Buyer ID: LESSONUSER1

Date: 5/2/2014

Allow Document Commitments

Vendor ID: ATTRACTI00001

Name: Attractive Telephone Co.

Currency ID: Z-US\$

Automatic Selection

The cursor is placed in front of text in a third-party application. When the assigned Function Keys are pressed, the search for the documents is executed.



Before Hotkey:

Type:	Standard	<input type="checkbox"/> Hold
PO Number	PO1006	
Buyer ID	LESSONUSER1	
Date	5/2/2014	
<input type="checkbox"/> Allow Document Commitments		

Vendor ID	ATTRACTI00001	
Name	Attractive Telephone Co.	
Currency ID	Z-US\$	

Cursor in front of text

After Hotkey:

Type:	Standard	<input type="checkbox"/> Hold
PO Number	PO1006	
Buyer ID	LESSONUSER1	
Date	5/2/2014	
<input type="checkbox"/> Allow Document Commitments		

Vendor ID	ATTRACTI00001	
Name	Attractive Telephone Co.	
Currency ID	Z-US\$	

All text is selected

Crosshair (OCR) Selection

When the assigned Function Keys are pressed, the user can OCR text from the screen using a crosshair selection tool and dragging a box around the text to select it. Once the selection is finished, a dialog with the extracted text is presented to the user. The user can modify the extracted text if needed, or cancel the execution. Once the 'OK' button is clicked, the search for the documents is executed.

After Hotkey:

Type:	Standard	<input type="checkbox"/> Hold
PO Number	PO1006	
Buyer ID	LESSONUSER1	
Date	5/2/2014	
<input type="checkbox"/> Allow Document Commitments		

Vendor ID	ATTRACTI00001	
Name	Attractive Telephone Co.	
Currency ID	Z-US\$	

Area selected with selection tool

After Area Selected:

Click 'OK' to perform search for

Attractive Telephone Co.

OKCancel