

***Remote Capture***  
***Quick Start Guide***  
**Platform Services Version**

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**Kelley Connect**

***Remote Capture***

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**Quick Start Guide updated on 1/24/2021**

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## **Remote Capture Quick Start Guide**

### **Preface**

This manual describes basic information to use the Remote Capture module.

### **What is Remote Capture?**

This suite of software products enhances the functionality of the DocuWare Integrated Document Management system. Remote Capture uploads files from a folder structure into a DocuWare file cabinet and indexes the documents using folder and file names. Folder and file names can be parsed using regular expressions to allow for precise indexing from complex folder structures. Remote Capture can run as a one-time import or as a service that continually monitors a folder structure.

### **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.

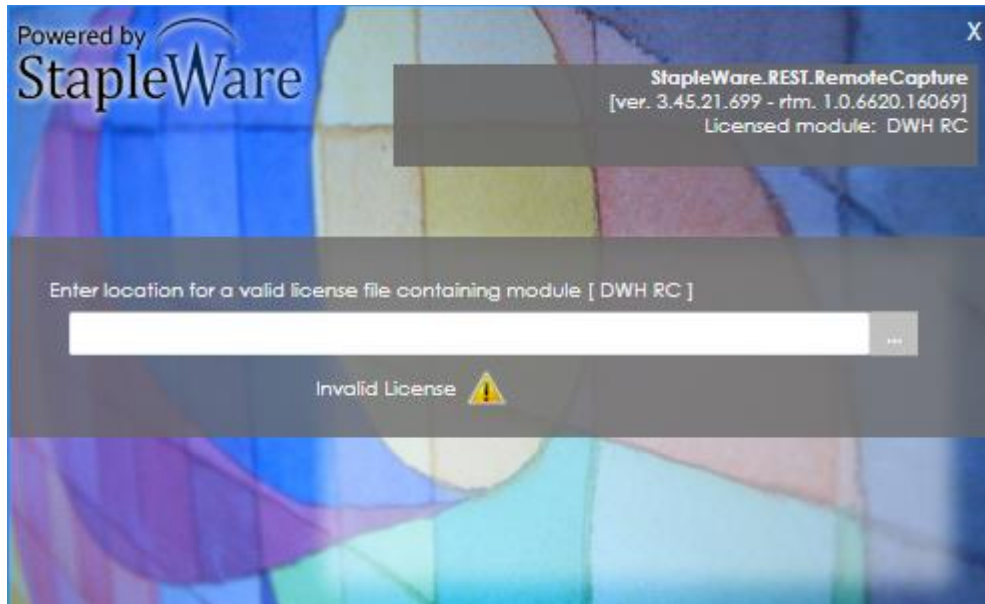
### **Installation**

Download Remote Capture from the StapleWare website at [www.stapleware.com](http://www.stapleware.com). Open the **Remote Capture.zip** or Remote Capture.zip setup utility. Double-click the **RemoteCaptureSetup\_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, exit the services (*if applicable*), and uninstall the program before running this upgrade.

## ***Installation - Licensing***

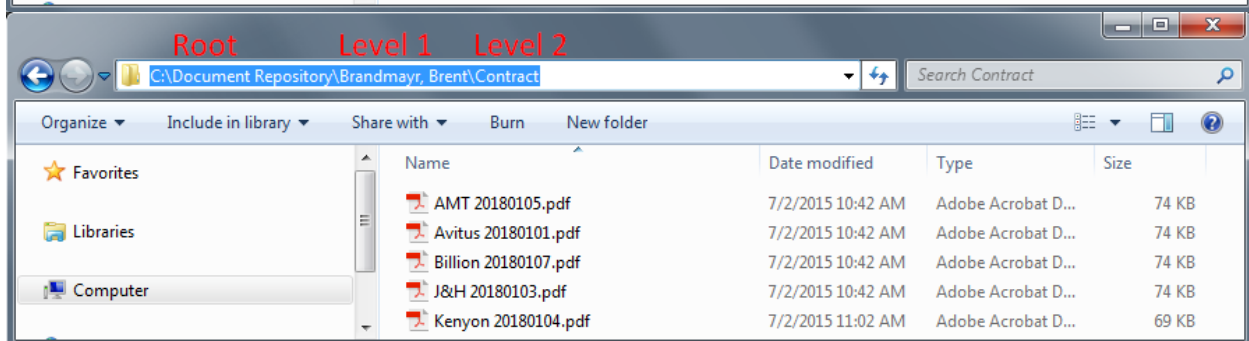
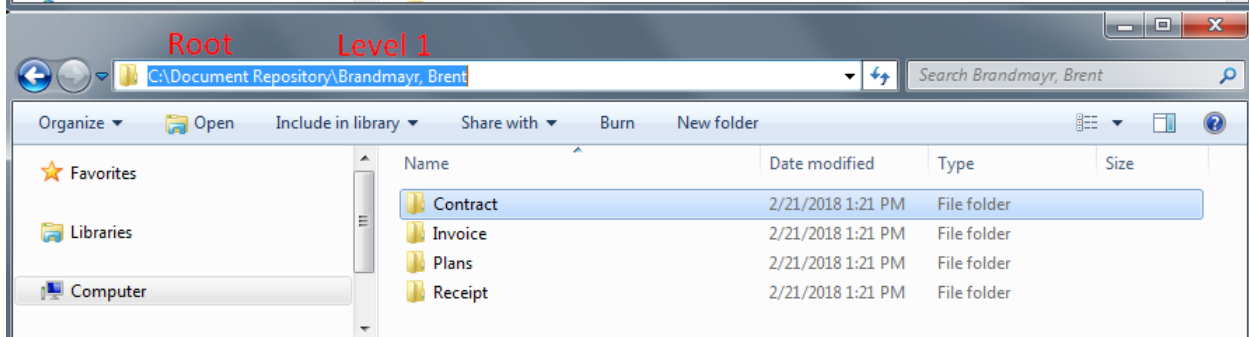
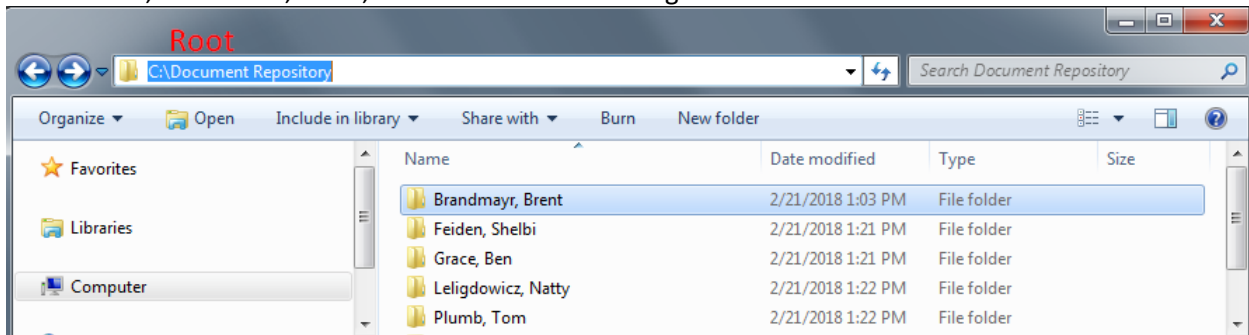
If you are starting Remote Capture for the first time the following message will appear when Remote Capture is started.



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

## Getting Started with Remote Capture

Remote Capture uploads files from a folder structure into a DocuWare file cabinet and indexes the documents using folder and file names. In the following screenshots, Remote Capture imports documents from the folder structure to a DocuWare file cabinet and indexes the DOCNAME, LASTNAME, FIRSTNAME, COMPANY, DATE, and DOCTYPE fields using folder and file names from the folder structure.

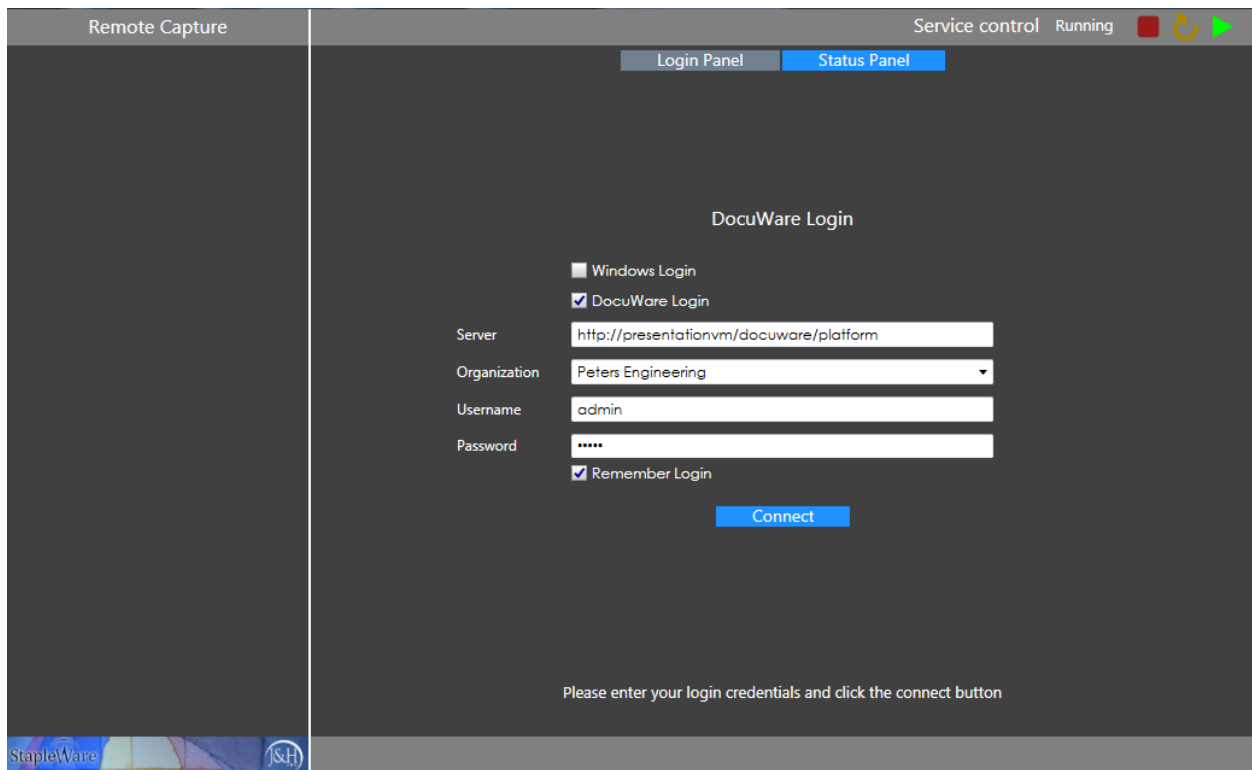


StapleWare - Modified Standard Search

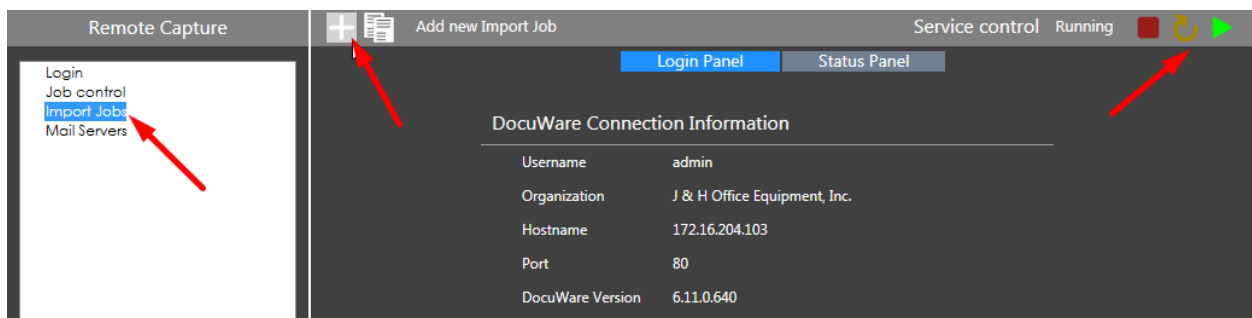
Type	DocName	Last Name	First Name	Company	Date	DocType	Status	Invoice #	Co
PDF	Kenyon 20180104	Brandmayr	Brent	Kenyon	01/04/2018	Contract	NEW		
PDF	J&H 20180103	Brandmayr	Brent	J&H	01/03/2018	Contract	NEW		
PDF	Billion 20180107	Brandmayr	Brent	Billion	01/07/2018	Contract	NEW		
PDF	Avitus 20180101	Brandmayr	Brent	Avitus	01/01/2018	Contract	NEW		

## Starting Remote Capture

The Remote Capture user interface needs to be ran as an administrator. When opening Remote Capture, right click on the icon and select 'Run as administrator'. When Remote Capture opens you will be presented with the DocuWare login screen. Enter a DocuWare server URL, Organization, and DocuWare login credentials, then click 'Connect'.



The Remote Capture service can be controlled with the 'Service Control' buttons on the top right of the screen. From the menu tree you can configure Import Jobs and Mail Servers. To create configurations either select the menu item and click the '+' button or right click the menu item and select the 'Add Configuration' popup.



## Connecting to DocuWare Cloud

Remote Capture 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.

DocuWare Login

Windows Login  
 DocuWare Login

Server:

Organization:

Username:

Password:

Remember Login


[Connect](#)

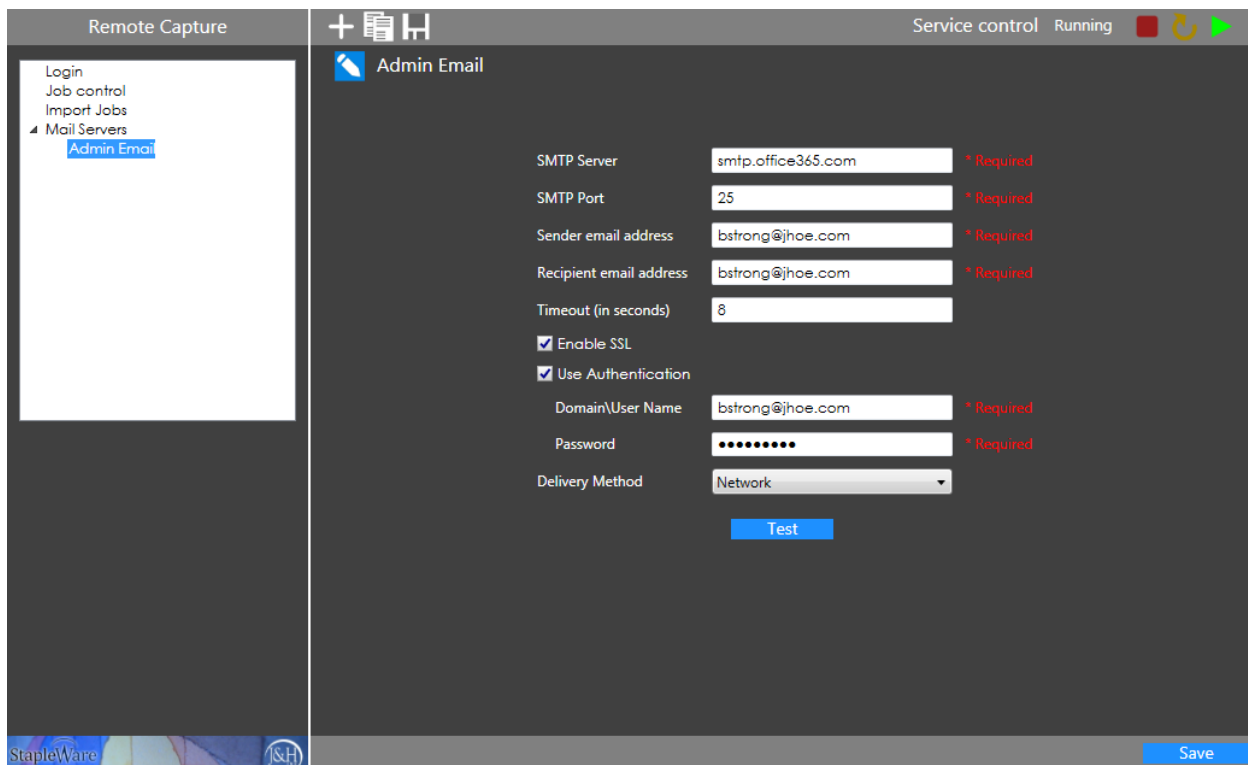
Please enter your login credentials and click the connect button

## Mail Server Configuration

Mail Server configurations are used for e-mailing error logs to a system administrator.

### Setup:

- 1) Create a new mail server configuration by right clicking on the 'Mail Servers' menu item and selecting 'New Mail Server'
- 2) Click the Edit (pencil button) to name the mail server
 
- 3) **SMTP Server** – IP address or name of the SMTP server
- 4) **SMTP Port** – SMTP server port number
- 5) **Sender Email Address** – Sender e-mail address
- 6) **Recipient Email Address** – Recipient e-mail address
- 7) **Timeout** – Number of seconds before timing out while attempting to send an e-mail
- 8) **Enable SSL** – Use SSL for additional security
- 9) **Use Authentication** – Username and Password for sender validation through SMTP server
- 10) **Delivery Method** – Specify how emails will be distributed
- 11) Click the 'Test' button to test the mail server configurations.



The screenshot shows the 'Admin Email' configuration form in the StapleWare interface. The form includes the following fields and options:

- SMTP Server:** smtp.office365.com (Required)
- SMTP Port:** 25 (Required)
- Sender email address:** bstrong@jhoe.com (Required)
- Recipient email address:** bstrong@jhoe.com (Required)
- Timeout (in seconds):** 8
- Enable SSL**
- Use Authentication**
- Domain\User Name:** bstrong@jhoe.com (Required)
- Password:** [Redacted] (Required)
- Delivery Method:** Network

Buttons for 'Test' and 'Save' are visible at the bottom of the form.

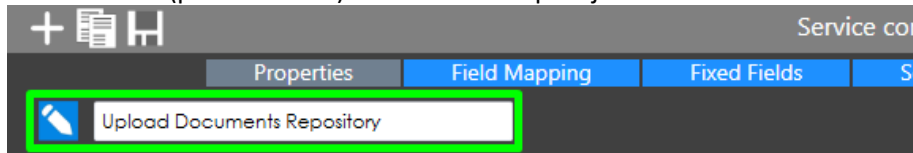
Click 'Save' to save the configuration



## Standard Import Job Configuration

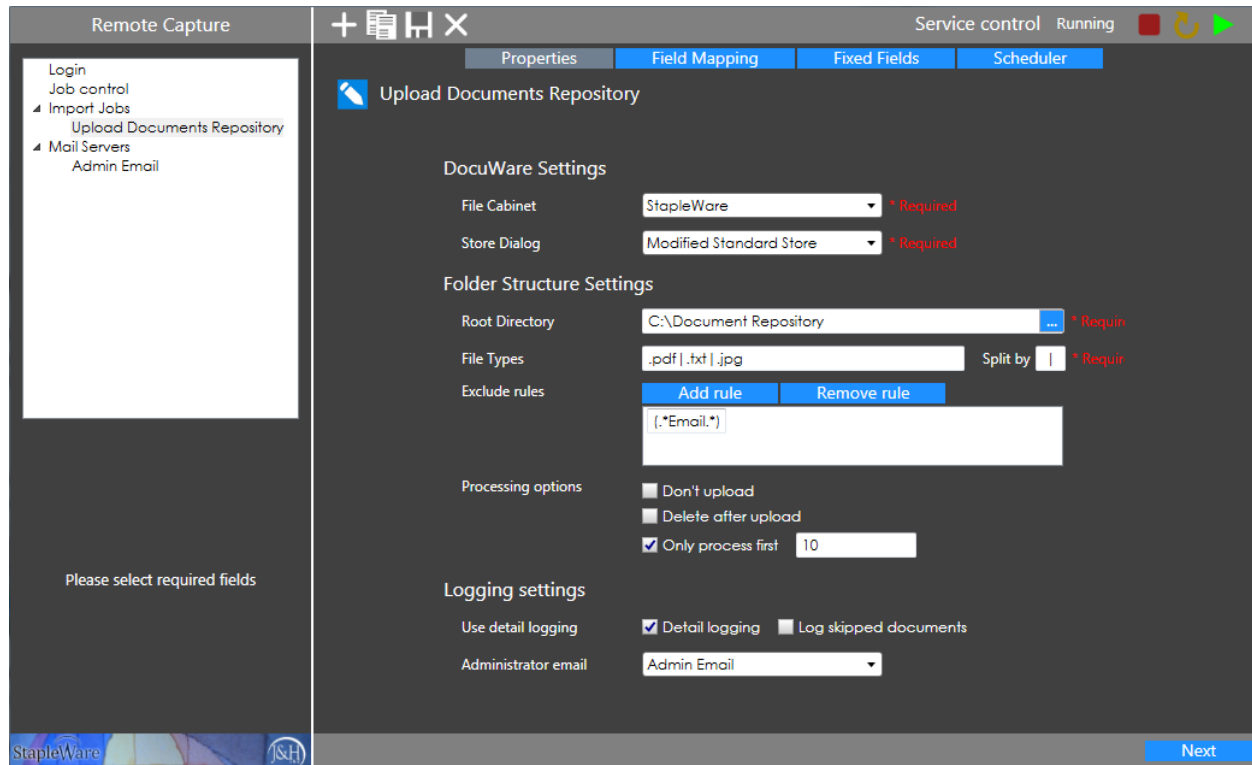
### Setup

- 1) Create a new import job configuration by right clicking on the 'Import Jobs' menu item and selecting 'New Import Job'
- 2) Click the Edit (pencil button) to name the import job



### Properties

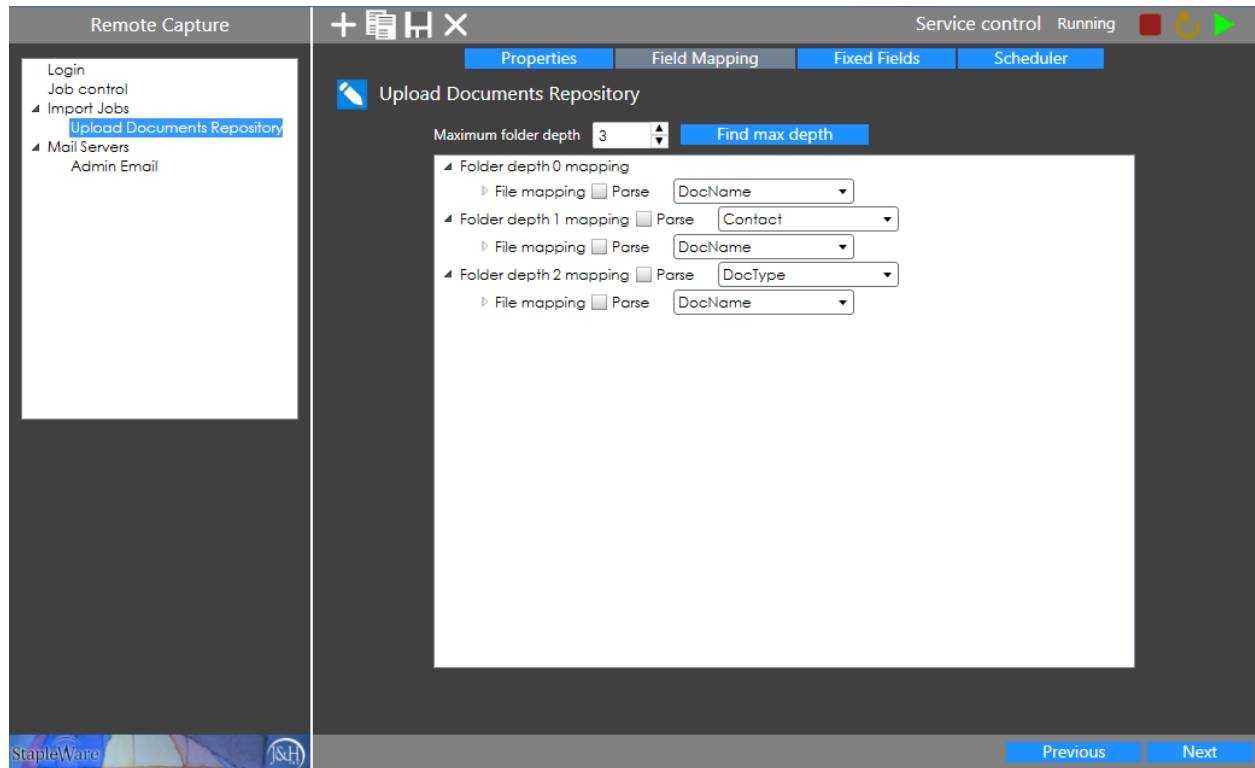
- 3) **File Cabinet** – Select the target DocuWare file cabinet.
- 4) **Store Dialog** – Select the correct Store Dialog for the selected file cabinet.
- 5) **Root Directory** – Root directory of the folder structure to store documents from
- 6) **File Types** – Filter for specific file types. Only the file extensions listed will be imported. Enter an asterisk [ \* ] to upload all file types.
- 7) **Exclude Rules** – Regular expression rule to exclude files from upload. If the file path matches the regular expression the file will not be uploaded. Test regular expressions using a regex testing tool like [www.regex101.com](http://www.regex101.com) .
- 8) **Don't upload** – Don't upload documents from the folder structure. Ideal for testing the configuration when regex parsing is used. Can be used in conjunction with 'Detailed Logging'.
- 9) **Delete after upload** – Permanently delete documents from the folder structure that are successfully imported into DocuWare.
- 10) **Only process first** – Process a fixed number of documents. Enter the number of documents to import.
- 11) **Detail Logging** – Creates a log file with detailed information regarding how file paths are used to index documents. Log output is to: <C:\ProgramData\DWAddOns\Remote Capture\log>
- 12) **Log skipped documents** – Create event in the detailed log file for every document that is not uploaded due to an exclusion rule. NOTE: This can greatly increase the detailed log file size.
- 13) **Administrator email** – Select the correct mail server for sending error logs to a system administrator.



Click the 'Next' button to move to the 'Field Mapping' tab.

## Field Mapping

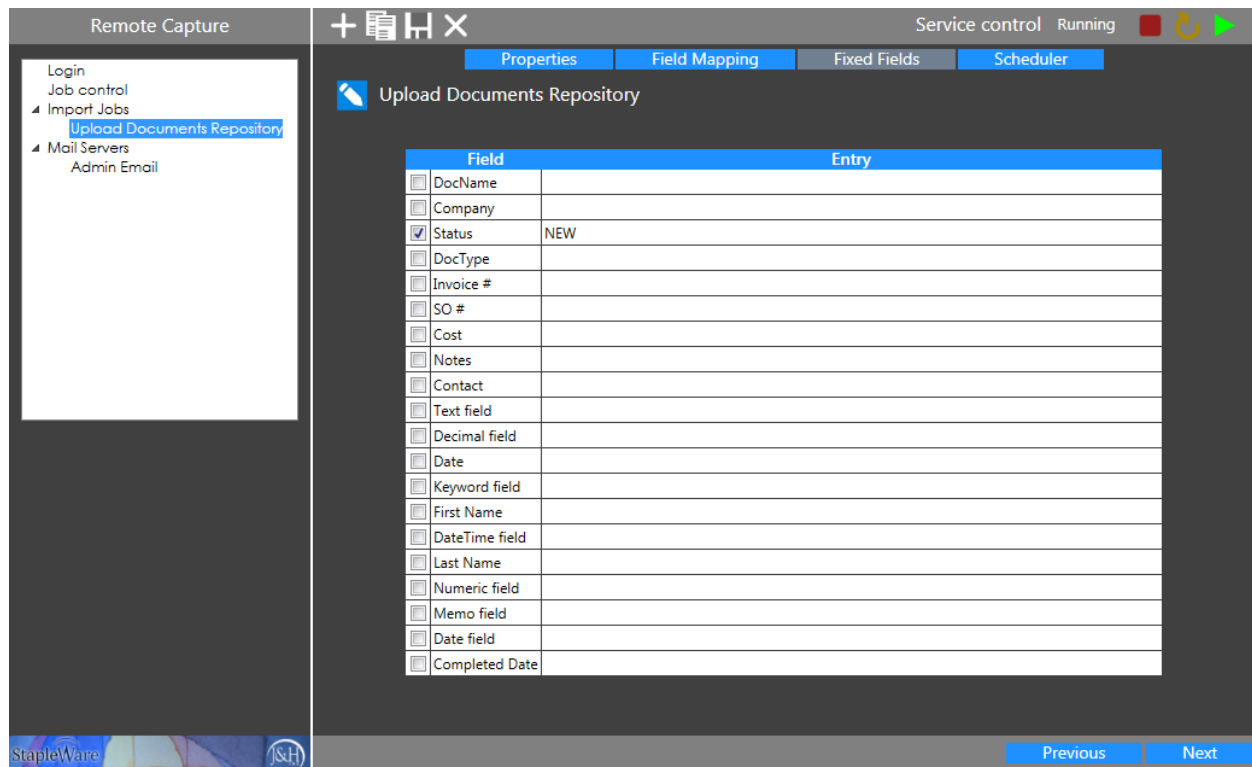
- 14) **Maximum Folder Depth** – Specify maximum folder depth for uploading documents. Click the 'Find Max Depth' button to automatically calculate the maximum folder depth within the root directory. NOTE: It may take a few minutes for large or network folder structures.
- 15) **Folder Depth X Mapping** – Define DocuWare index field to Folder Name mapping.
  - a. **Parse** – Parse the folder name into multiple DocuWare index fields using regex. Please refer to the 'Parsed Import Job Configuration' section for parsing instructions.
- 16) **File Mapping** – Define DocuWare index field to File Name mapping
  - a. **Parse** – Parse the file name into multiple DocuWare index fields using regex. Please refer to the 'Parsed Import Job Configuration' section for parsing instructions



Click the 'Next' button to move to the 'Fixed Fields' tab.

## Fixed Fields

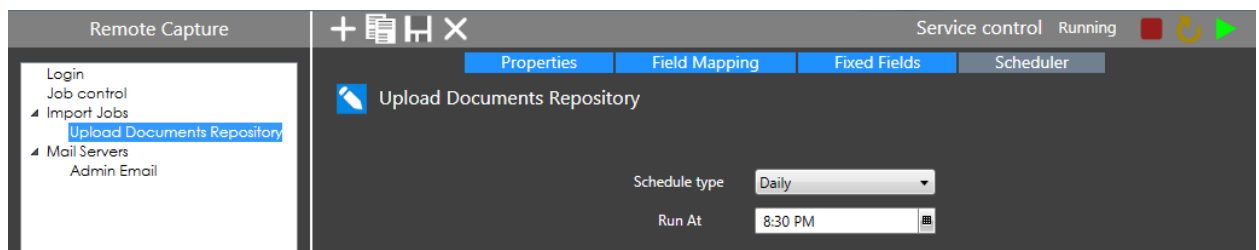
- 17) Select the checkbox next to a field to enable it for Fixed Entry
- 18) Type in the value into the Entry text box



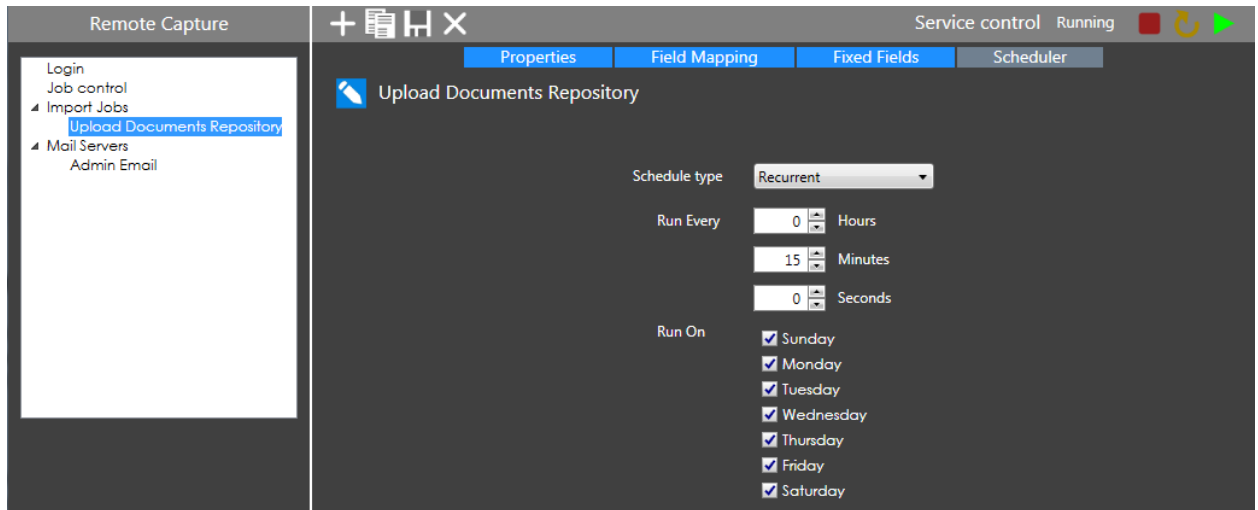
Click the 'Next' button to move to the 'Scheduler' tab.

## Scheduler

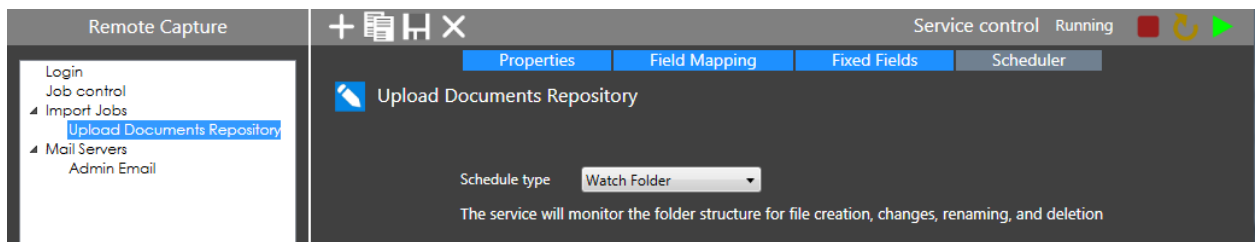
- 19) **None** – The job is not active.
- 20) **Daily** – The job will run once every day at the specified time.



- 21) **Recurrent** – The job will run on the specified days at the specified time interval.



22) **Watch Folder** – Folder structure will be monitored and documents will be imported into DocuWare upon actionable file events: Create, Modify, Rename or Delete.



Click the 'Save' button to save the Import Job.

## ***Parsed Import Job Configuration***

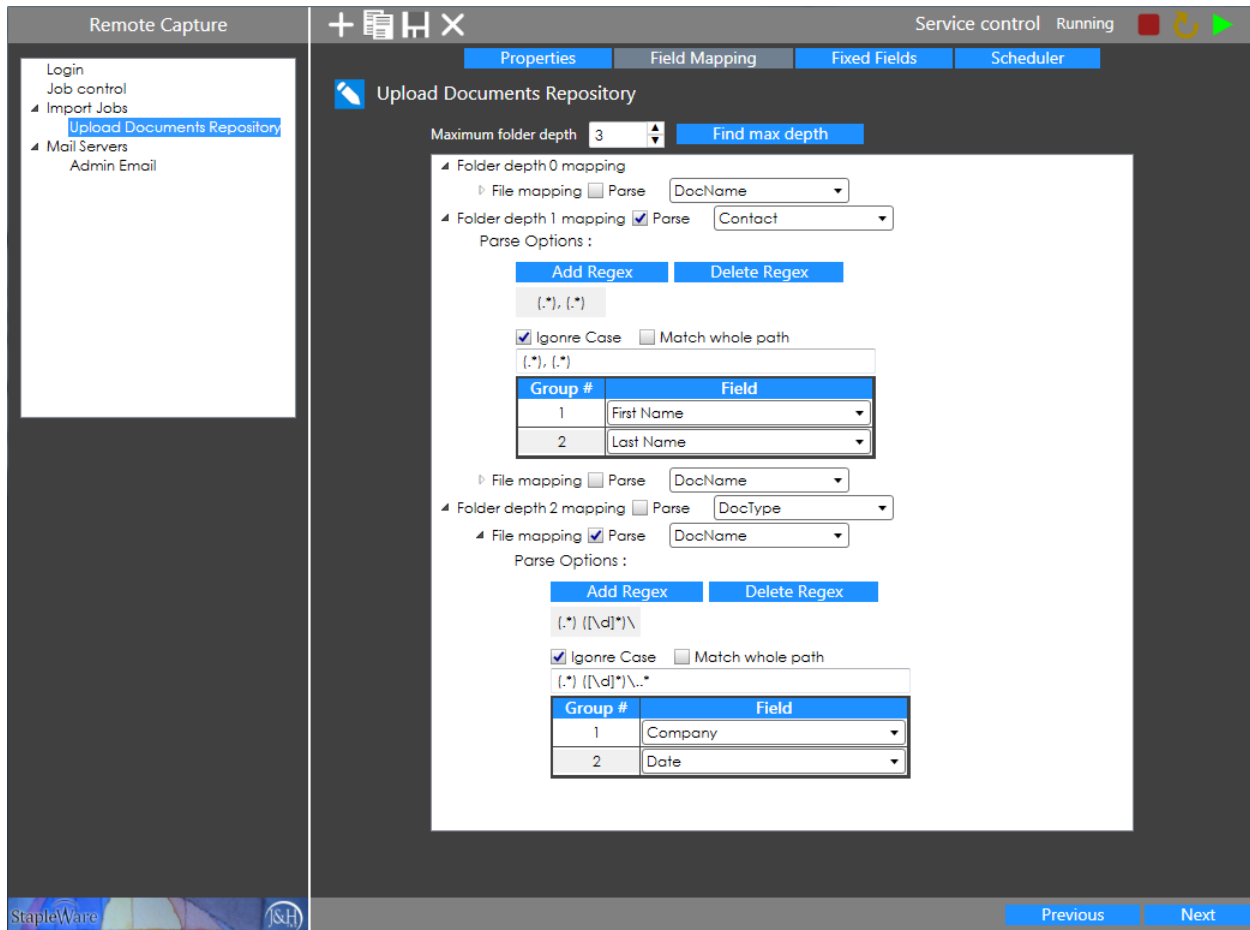
Import Jobs can parse folder and file names with regular expressions and use the capture groups to populate DocuWare index fields.

### **Field Mapping**

- 1) Check the 'Parse' checkbox next to 'Folder depth X mapping' to parse the folder name.
- 2) Check the 'Parse' checkbox next to 'File mapping' to parse file names within the folder level.
- 3) **Add Regex** – Add a regex group to match  
**NOTE:** Remote Capture evaluates regex groups in a linear order on each parse level. The first regex found that matches the file path will be used for parsing the file path and no further regex at that parse level will be evaluated.
- 4) **Delete Regex** – Delete the selected regex group
- 5) **Ignore Case** – Treat uppercase and lowercase the same when matching regex
- 6) **Match whole path** – Match the entire folder/file path instead of just this folder/file name.  
**NOTE:** Ideal for changing field mappings based on which parent directory the folder or file is located in.

### **NOTES:**

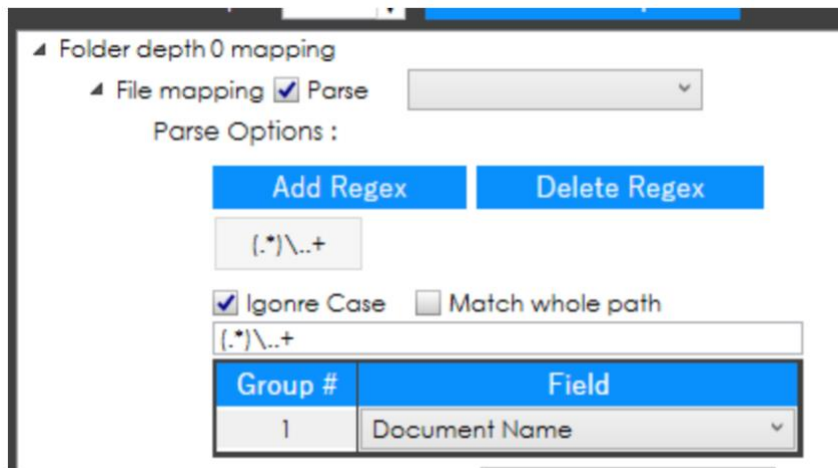
- The group mapping table rows in each parsing section will be automatically populated based on how many match groups there are in the regex. More specifically, every time an opening parentheses [ ( ] is typed in the regex text box, a row will be added to the group mapping table.
- If you use multiple regex rules on a parse level, carefully plan the ordering so that the most appropriate rule for the parse level is matched first.
- Index fields will receive the value for the deepest folder/file level that they are matched to. For example, if COMPANY is set and matched to both folder levels 1 and 2, COMPANY will be set to the value at folder level 2.
- Test regular expressions using a regex testing tool like [www.regex101.com](http://www.regex101.com) .



Click 'Next', 'Next', and 'Save' to save the Import Job.

This expression will capture the file name without the extension. Apply it as a file parse rule at each of the folder levels.

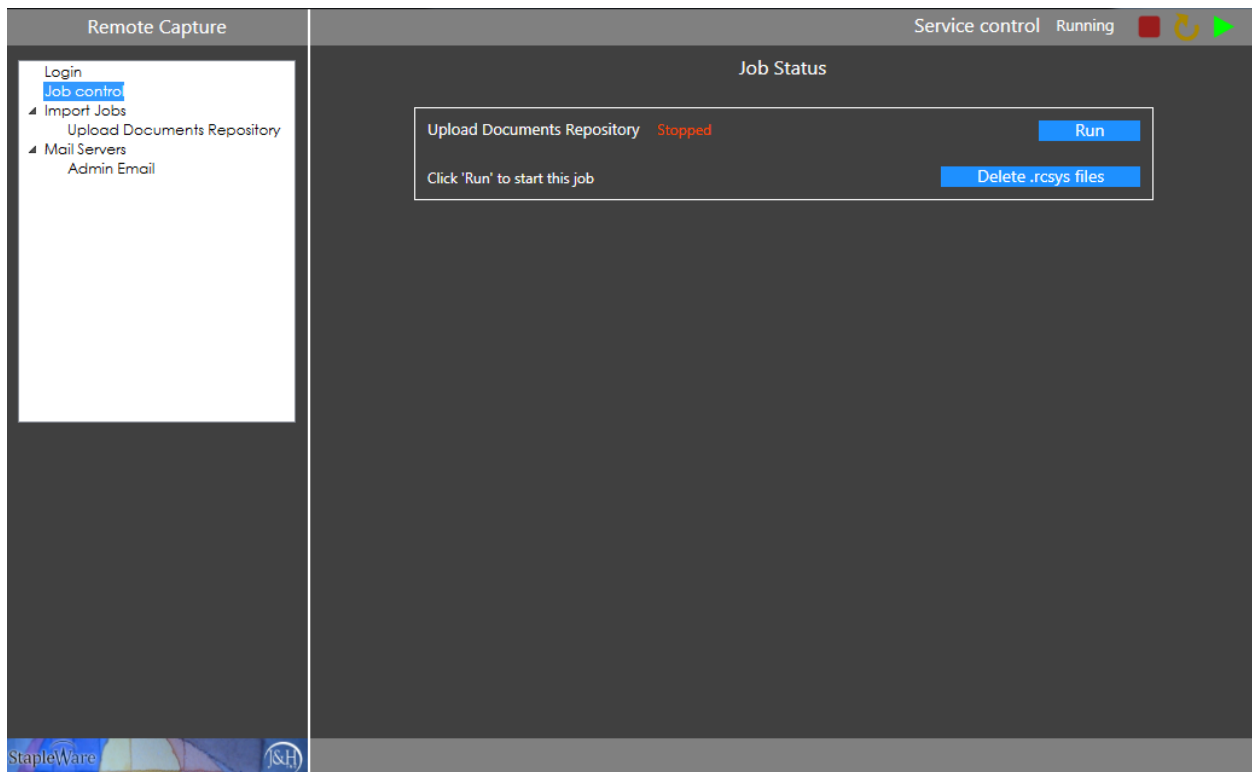
`(.*)\..+`



## Job Control

Import Jobs can be ran manually from the Job Control node. NOTE: Ideal for testing configurations before running on a schedule, or for running a one-time import into DocuWare. Click 'Run' to manually execute the job.

**Delete .rcsys files** – When Remote Capture uploads a file to DocuWare, a companion file is created with the extension .rcsys. Companion files track which documents have already been uploaded to DocuWare to eliminate duplicates. Clicking the 'Delete .rcsys files' button will purge companion files out of the folder structure. Companion files will not be created if 'Delete after upload' is enabled for the import job.





## Tray Icon

### Closing the Dialog

Click the Red 'X' in the top right corner of the Remote Capture dialog to minimize the configuration dialog to the Windows system tray.

### Using the Tray Icon

Click the Remote Capture icon to access the tray icon menu.

- 1) **Exit** – Completely close Remote Capture. All import jobs running in the 'Job control' screen will be terminated.
- 2) **Settings** – Open the configuration dialog

