StapleWare®

Web Client Integration Tool

Quick Start Guide

Platform Services Version

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Kelley Connect

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.

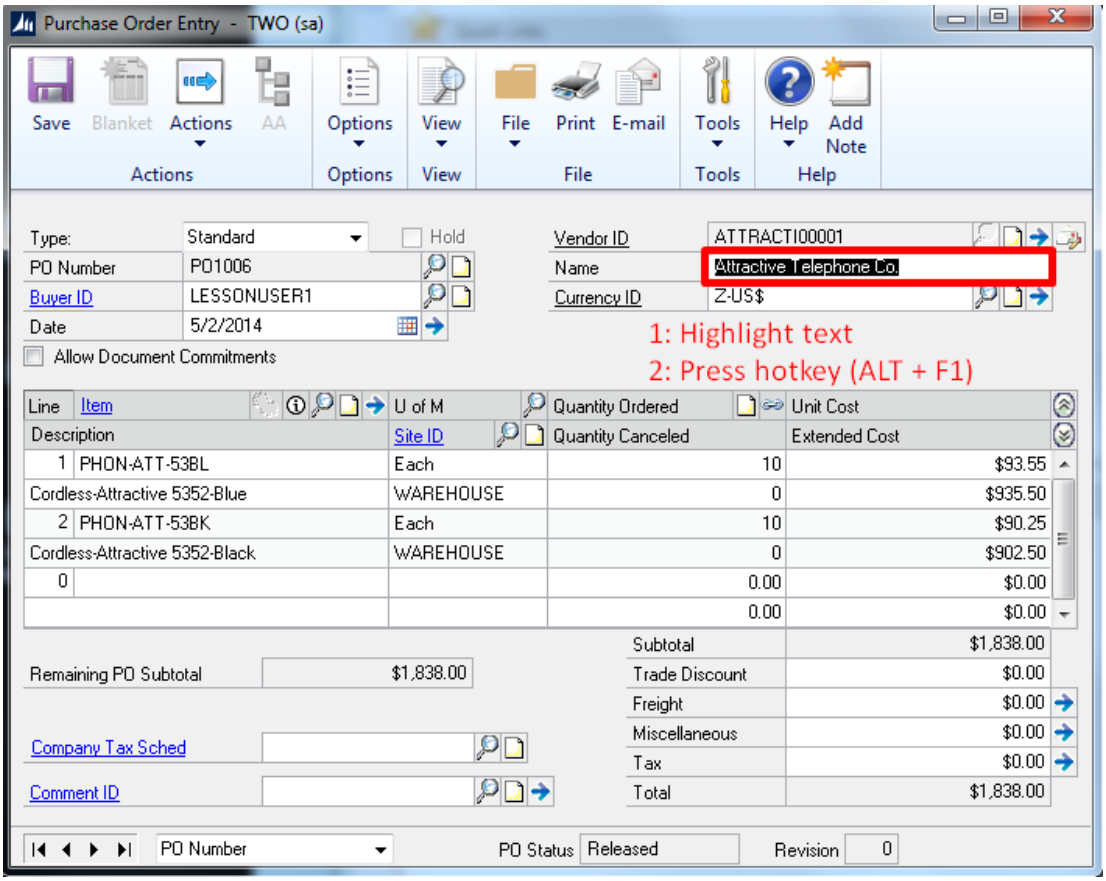
Installation - Licensing

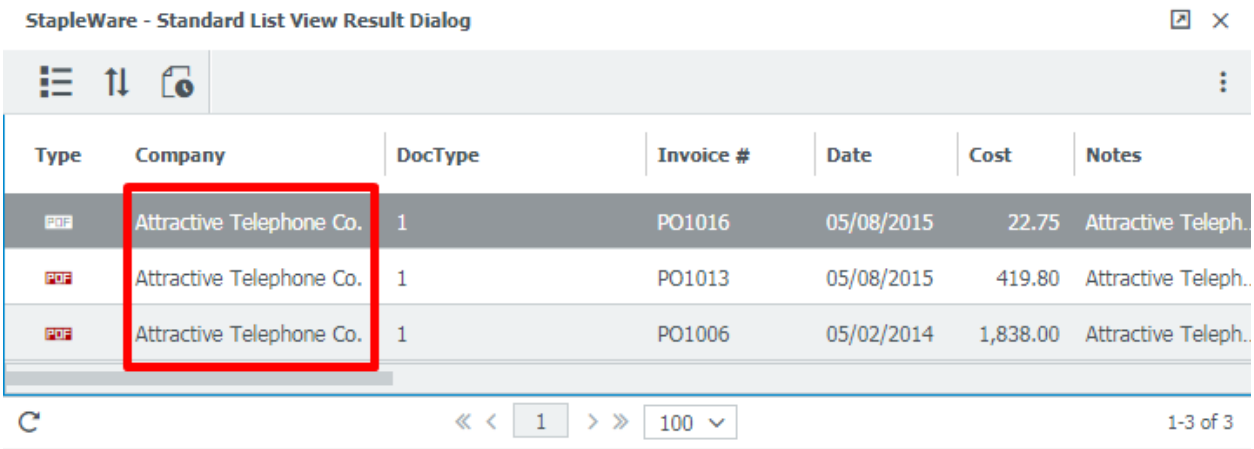
If you are starting Web Client Integration Tool for the first time the following message will appear when Web Client Integration Tool is started.

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

Getting Started with Web Client Integration Tool

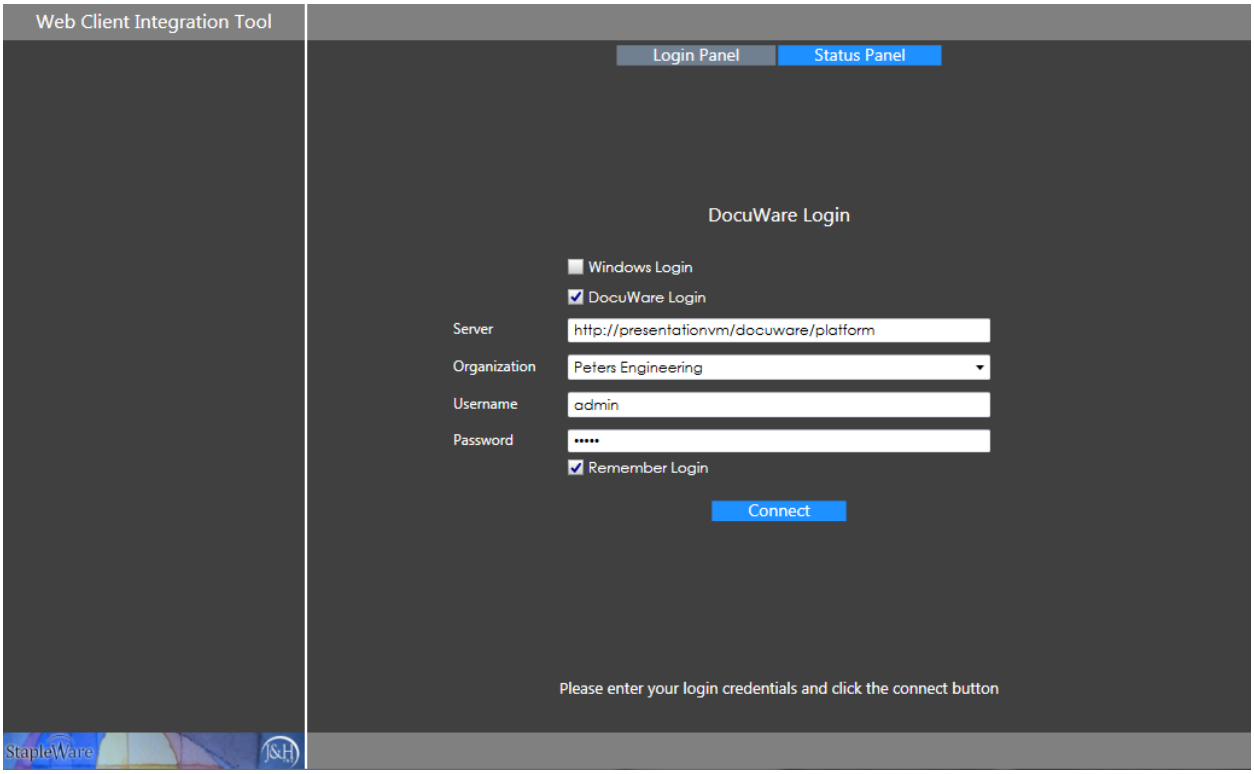
Web Client Integration Tool can use any text on the screen to search for and display a document result list in the DocuWare Web Client. In the following screenshots a company name has been selected in a third party application. Once the assigned hotkey is pressed (ALT + F1) a result list of documents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



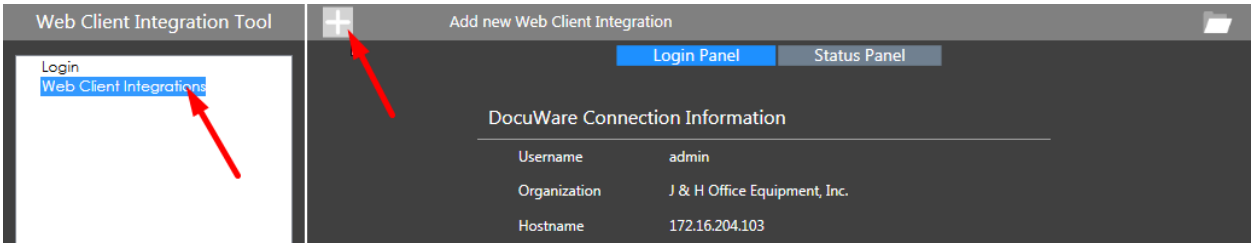


Starting Web Client Integration Tool

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'.

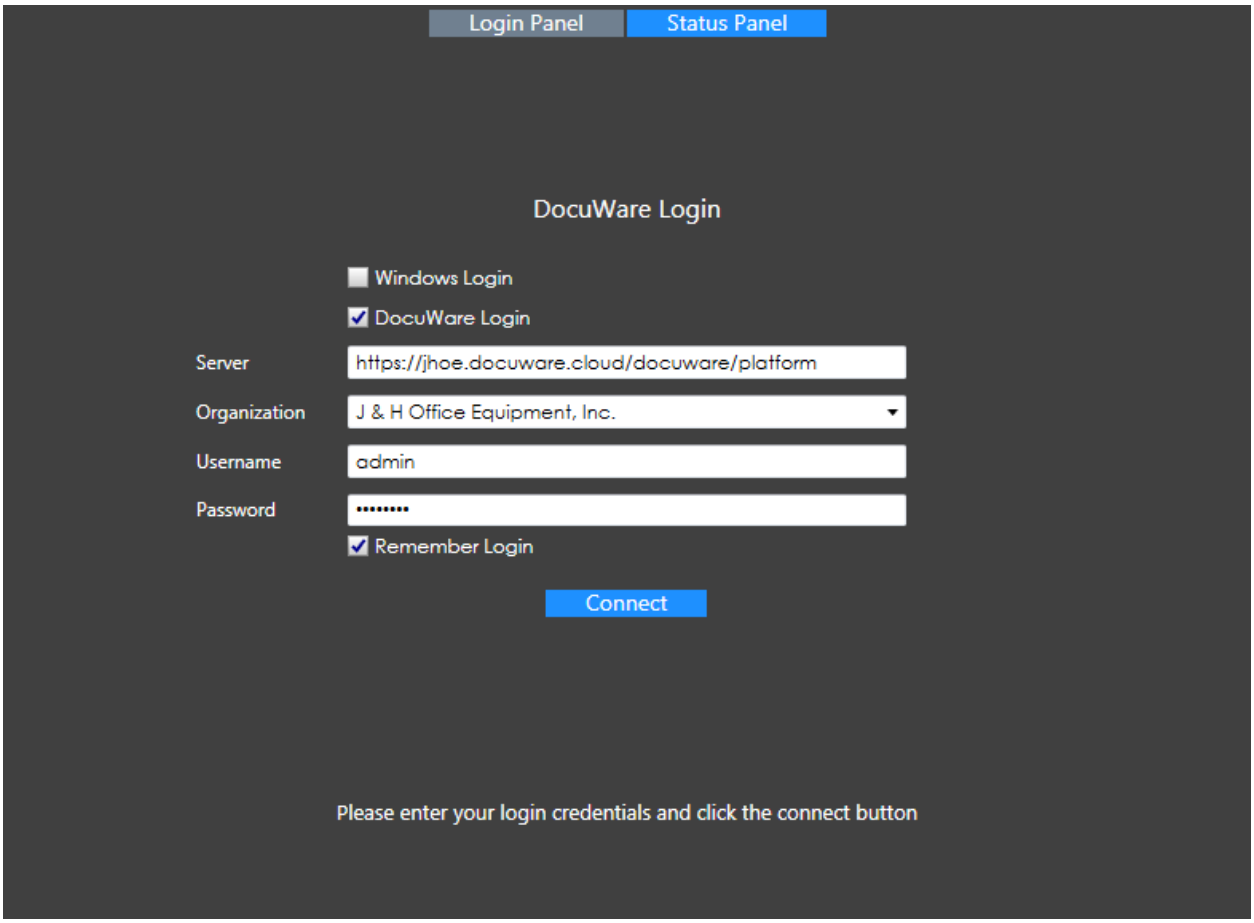


From the menu tree you can configure Web Client Integrations. To create an integration either select the menu item and click the '+' button or right click the menu item and select the 'Add Integration' popup.



Connecting to DocuWare Cloud

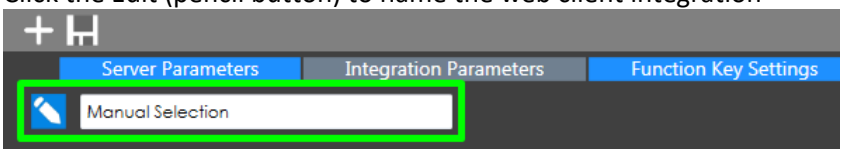
Web Client Integration Tool works with DocuWare Cloud. Enter the DocuWare Cloud server URL, Organization, and DocuWare Cloud login credentials, then click 'Connect'. These credentials are the same as the credentials for the DocuWare Cloud Web Client.



Web Client Integration Configuration – Manual Select

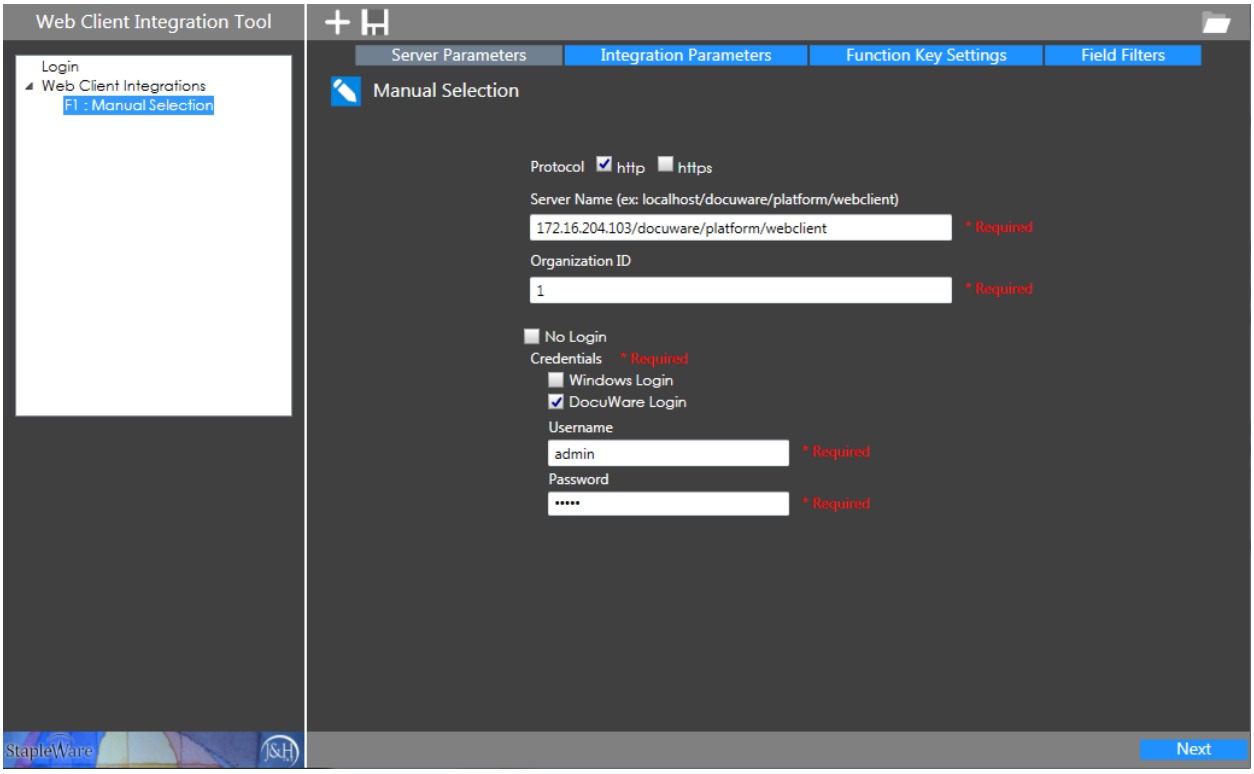
Setup

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

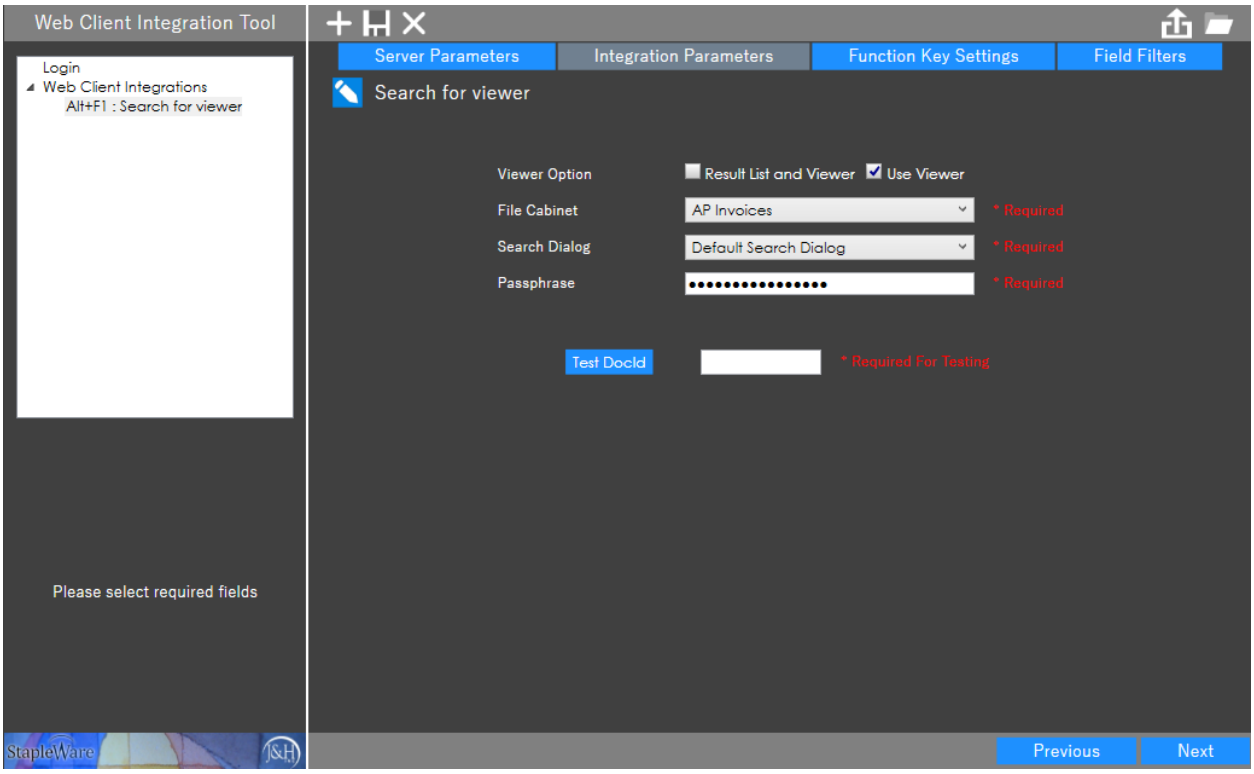
1) **Protocol** – Choose HTTP or HTTPS protocol for the integration link
2) **Server Name** – URI for the DocuWare Web Client (the DocuWare server URL)
3) **Organization ID** – The ID number of your organization
4) **Credentials** – Select Windows Login for NTLM authentication and DocuWare Login to enter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



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'.
9) **Passphrase** – Enter in a passphrase for encrypting the URL. Reference page 17 for help on where to find the passphrase.

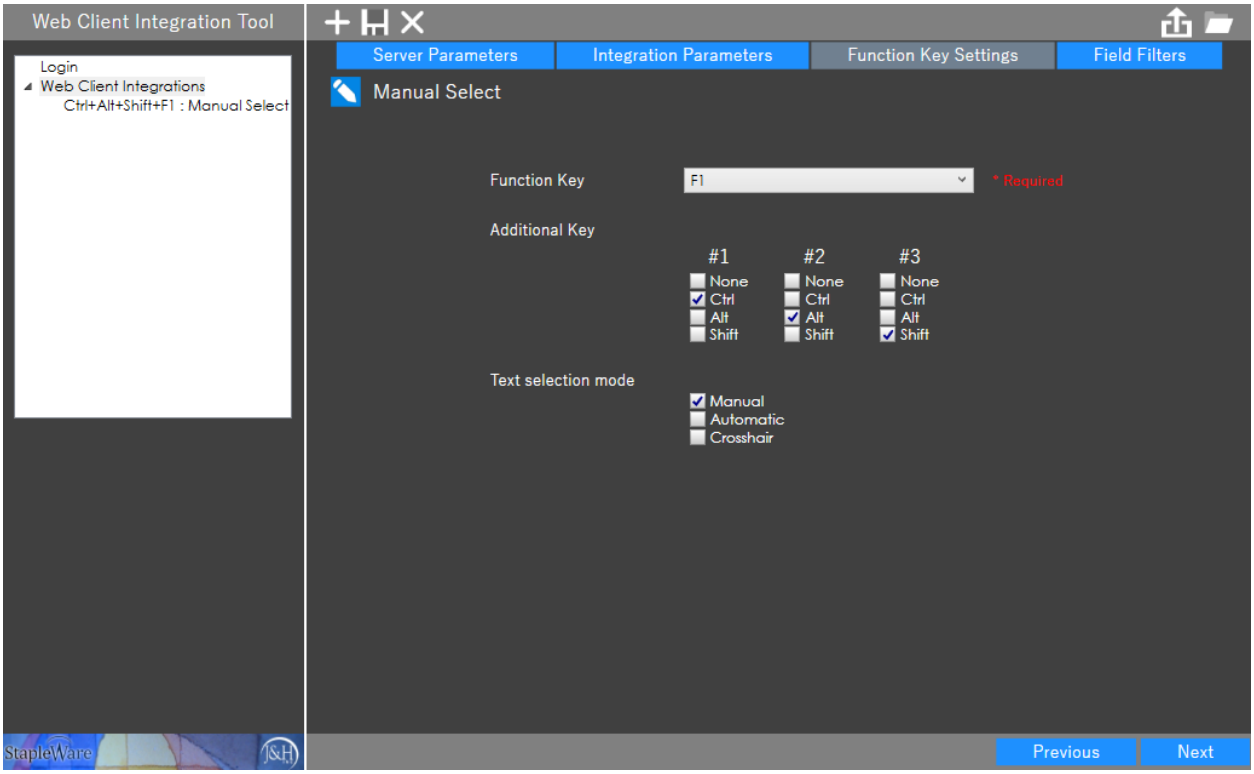


Click 'Next' to move to the 'Function Key Settings' tab.

Function Key Settings

10) **Function Key** – Assign a function key (F1 – F12,0-9,A-Z) to use as hotkey for executing the integration.
11) **Additional Key** – Assign an additional key(s) to be pressed in combination with the Function Key for executing the integration.
12) **Text selection mode** – Define how text will be read from the screen:
    a. **Manual** – Manually select text with the mouse cursor

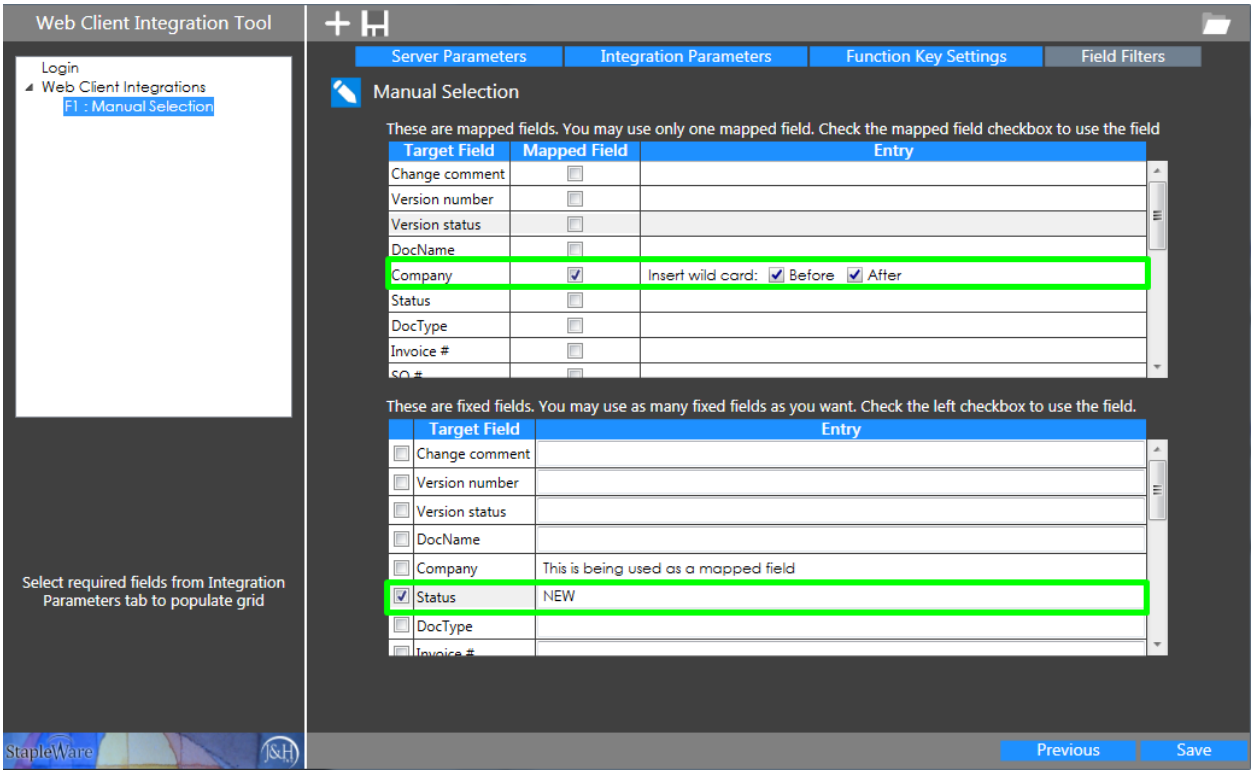
b. **Automatic** – Place mouse cursor in front of text. The integration will automatically select the text to the right of the mouse cursor.
c. **Crosshair** – OCR text from the screen using a crosshair selection tool and dragging a box around the text to select it. NOTE: Use this option if the third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



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

Field Filters

13) **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.
14) **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.



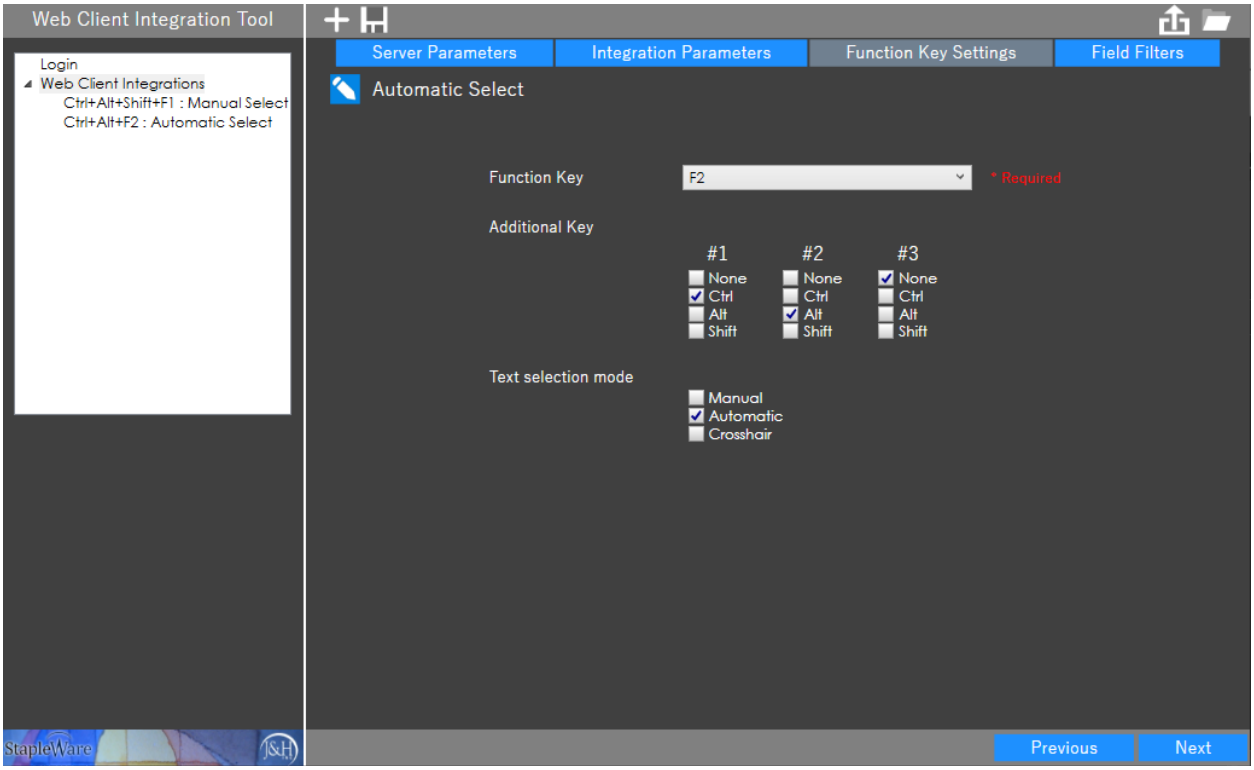
Click the ‘Save’ button to save the Web Client Integration

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



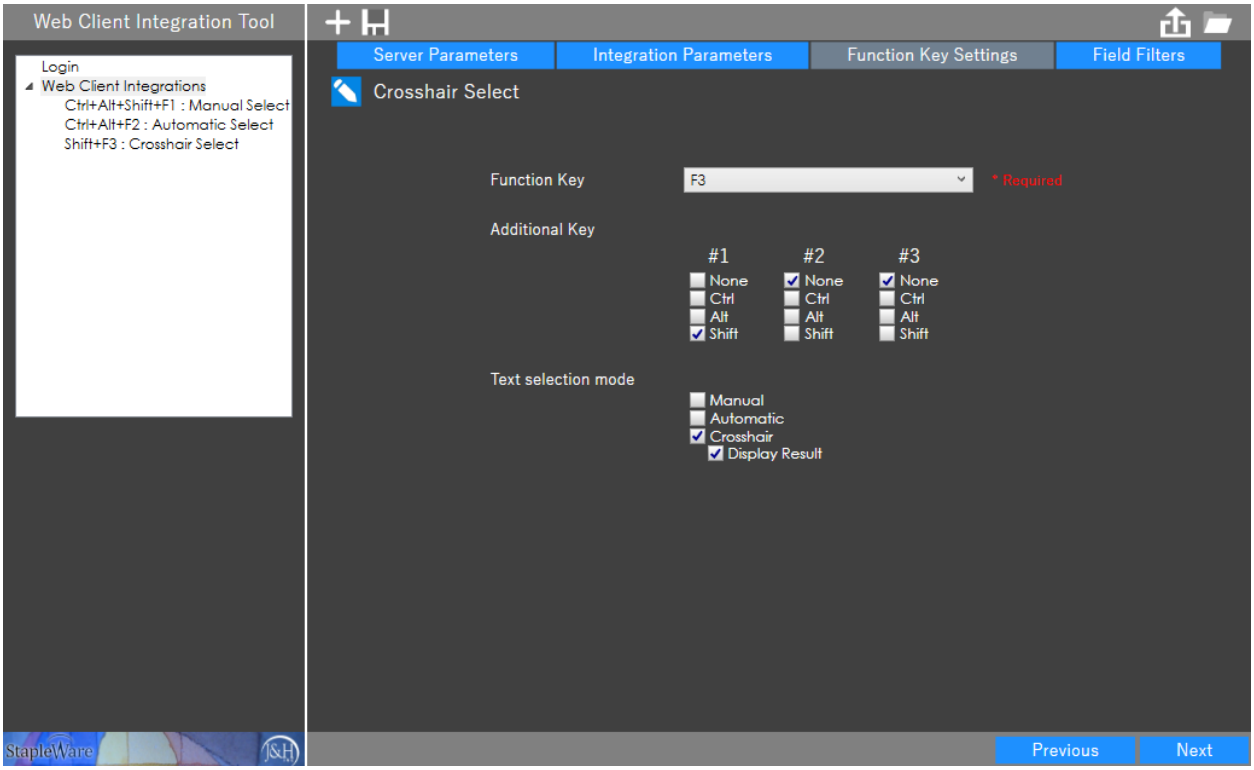
Click ‘Next’ then ‘Save’ to save the Web Client Integration

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.

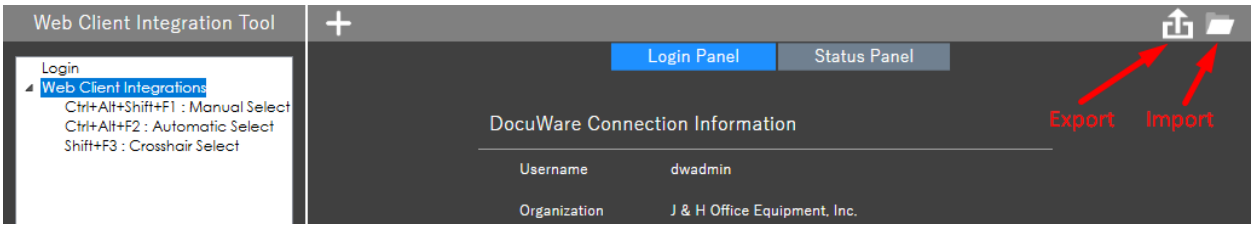


Click ‘Next’ then ‘Save’ to save the Web Client Integration

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

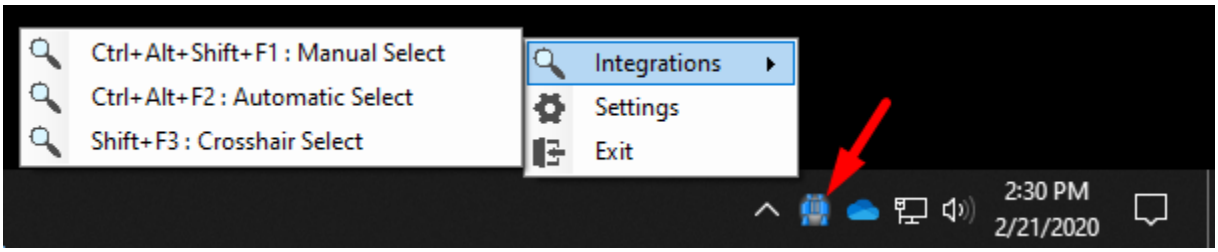
Closing the Dialog

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.

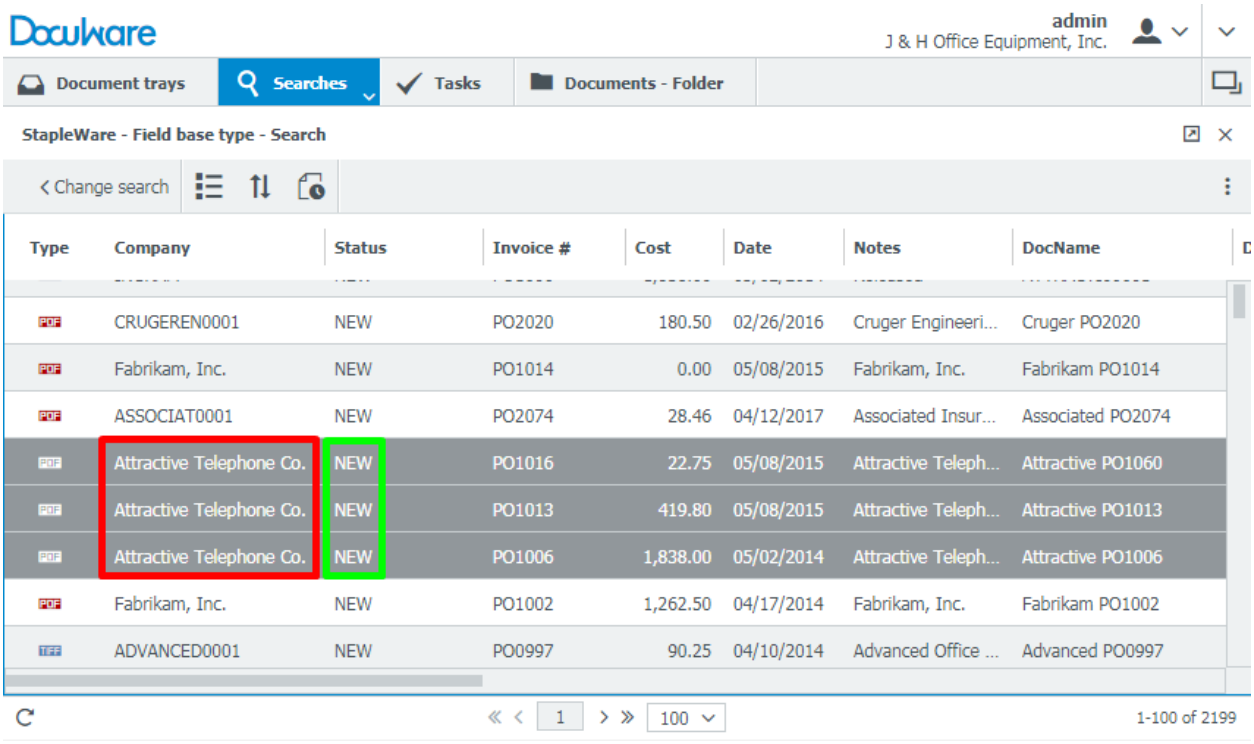
1) **Exit** – Completely close Web Client Integration Tool. Integrations will be inactive until Web Client Integration Tool is started again.
2) **Settings** – Open the configuration dialog.
3) **Integrations** – Execute an integration by clicking on the name of the Integration in the sub menu.



Example

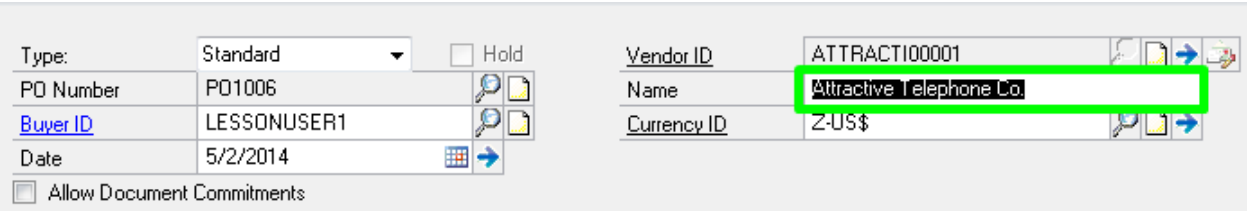
DocuWare Web Client View

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



Manual Selection

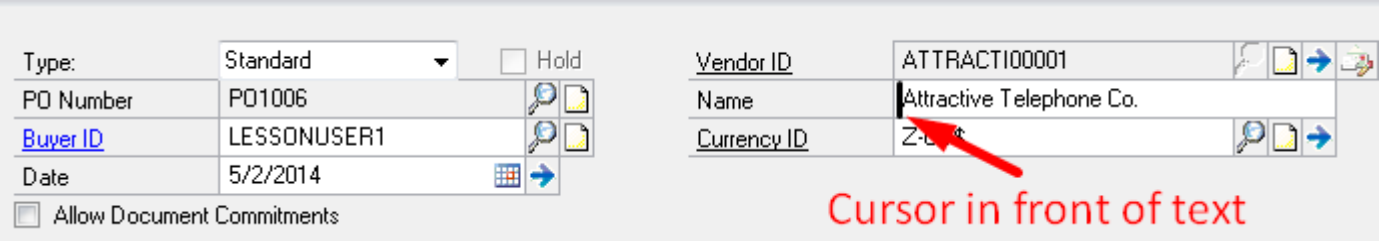
Text is manually selected in a third party application by the user. When the assigned Function Keys are pressed, the search for the documents is executed.



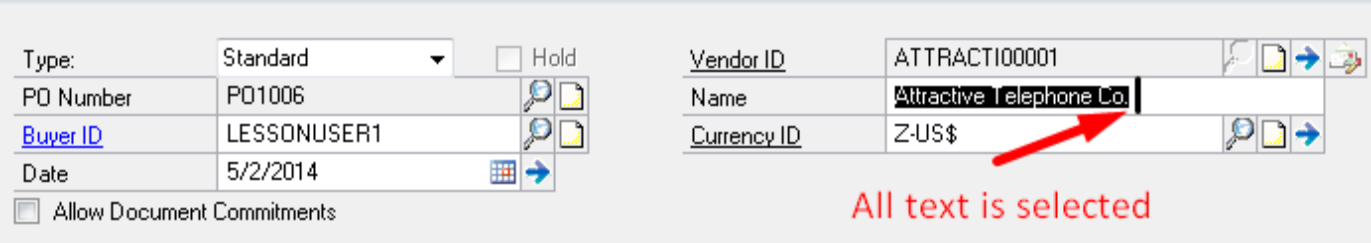
Automatic Selection

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:



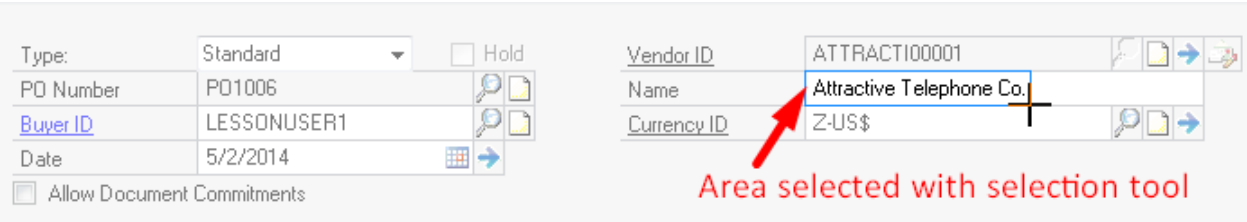
After Hotkey:



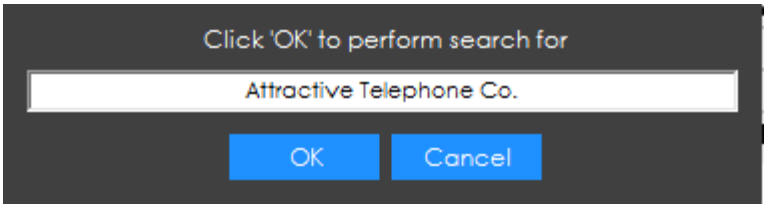
Crosshair (OCR) Selection

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:



After Area Selected:



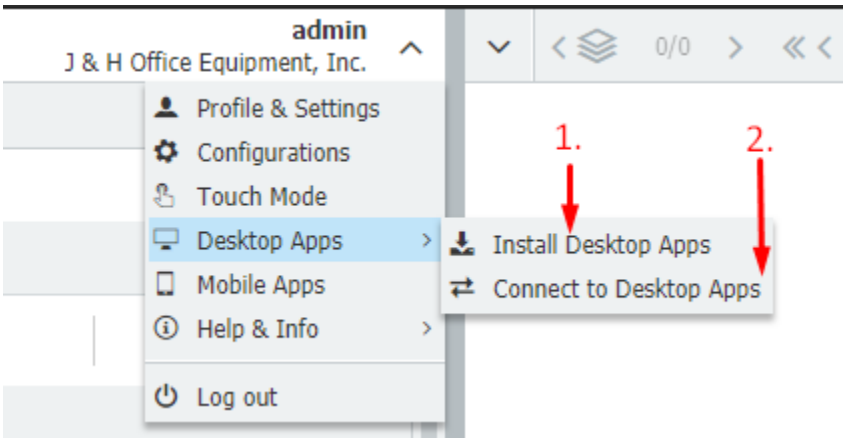
Passphrase

Explanation

DocuWare requires the query portion of the integration URLs to be encrypted with the organization passphrase. This change is required by DocuWare for DW 7.0 and up. As a result, the passphrase is also required for configuring Web Client Integration Tool.

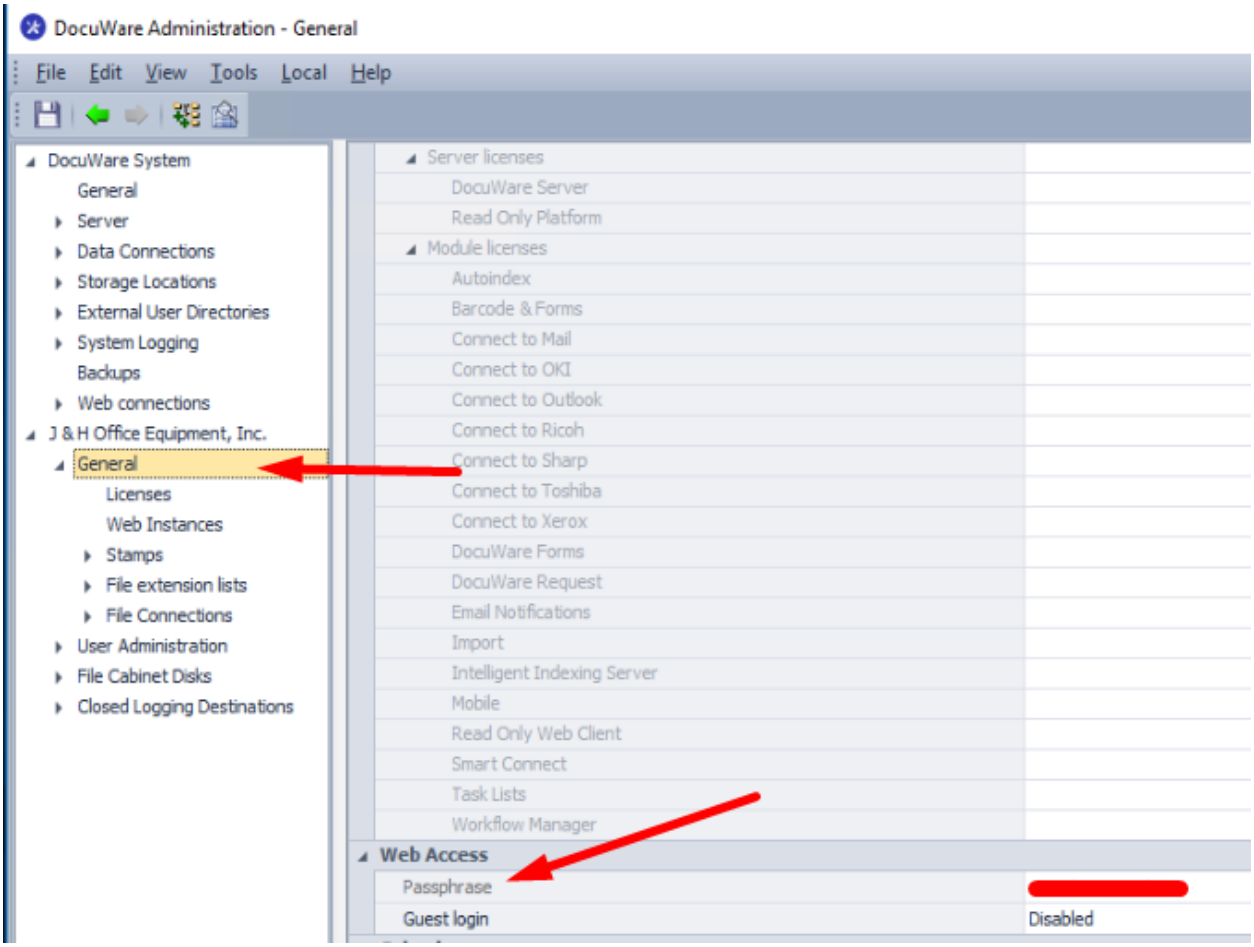
DocuWare Administration Desktop Tool Download

The passphrase is in the administration desktop tool. The Desktop Apps installer installs the administration desktop tool. The DocuWare Desktop Apps installer download link is the DocuWare web client. Click on the 'Install Desktop Apps' menu item to download the installer and click 'Connect to Desktop Apps' to connect the administration tool once it's installed.



Find the Passphrase

Open the administration desktop tool, click on Organization->General, and scroll down to the passphrase box. Copy and paste this passphrase into the Web Client Integration Tool.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Connect to Sharp
Connect to Toshiba
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