



***Document Tray Import***  
***Quick Start Guide***  
**Platform Services Version**

All rights reserved  
J&H, Inc. 2021

Big Sky Systems, Inc.  
PO Box 4401  
Bozeman, MT 59772  
406-223-5463  
tom@bigskysystems.biz

***Document Tray Import***  
Program updated by Brandon Strong  
Quick Start Guide updated on 1/24/2021

## Contents

Page	Description
3	Preface
3	What is Document Tray Import?
3	Licensing
3	Installation
5	Starting Document Tray Import
6	Connecting to DocuWare Cloud
7	Import Job Configuration – File Cabinet
11	Import Job Configuration – Folder



## **Document Tray Import Quick Start Guide**

### **Preface**

This manual describes basic information to use the Document Tray Import module.

### **What is Document Tray Import?**

This suite of software products enhances the functionality of the DocuWare Integrated Document Management system. Document Tray Import is a service that automatically imports documents from a DocuWare document tray to a DocuWare file cabinet. Documents are imported based on the confidence rating (red, yellow, or green) of Intelligent Indexed fields in the document tray. Document Tray Import also supports exporting documents from a DocuWare document tray to a local file system.

### **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.

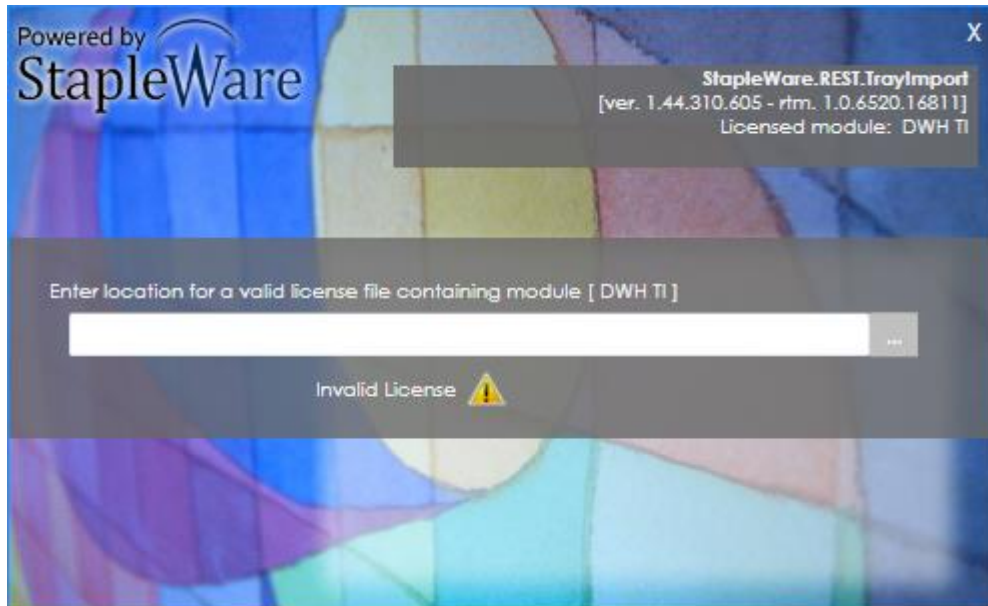
### **Installation**

Download Document Tray Import from the StapleWare website at [www.stapleware.com](http://www.stapleware.com). Open the **Document Tray Import Service.zip** or Document Tray Import Service.zip setup utility. Double-click the **InstallTrayImport\_v.\*.exe** 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***

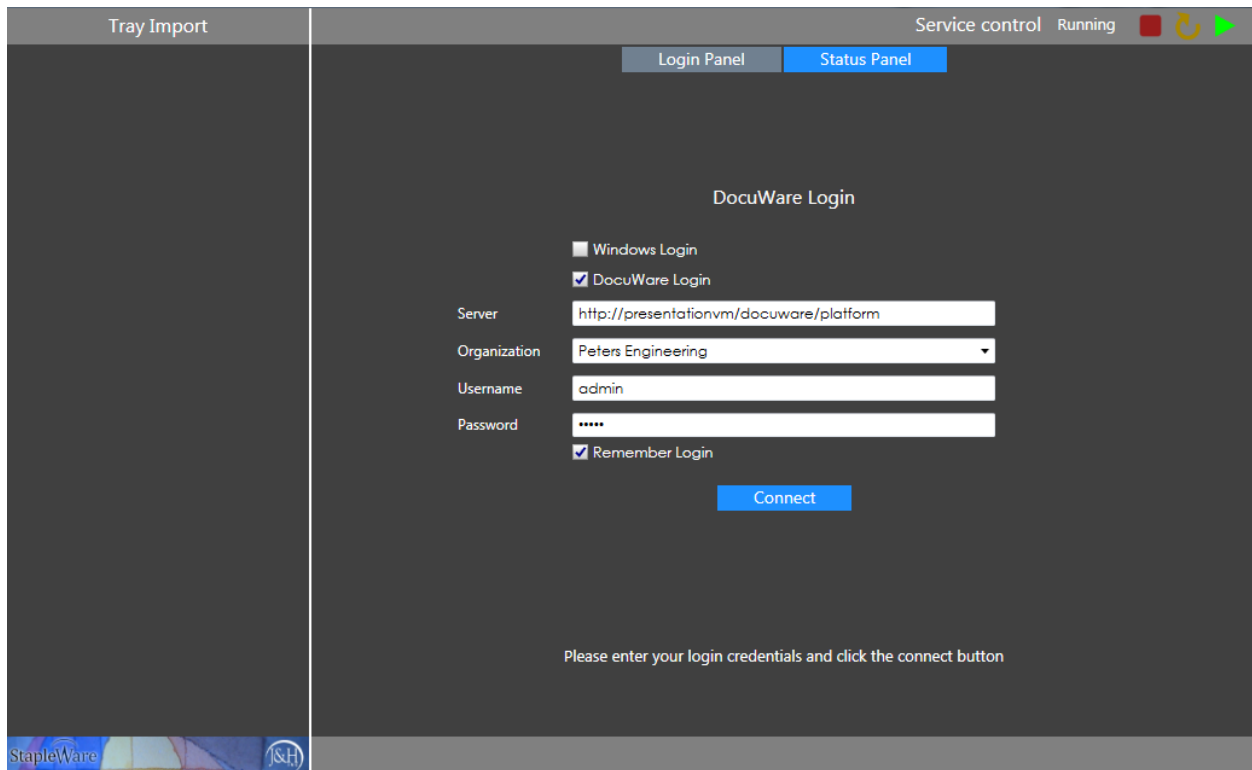
If you are starting Document Tray Import for the first time the following message will appear when Document Tray Import is started.



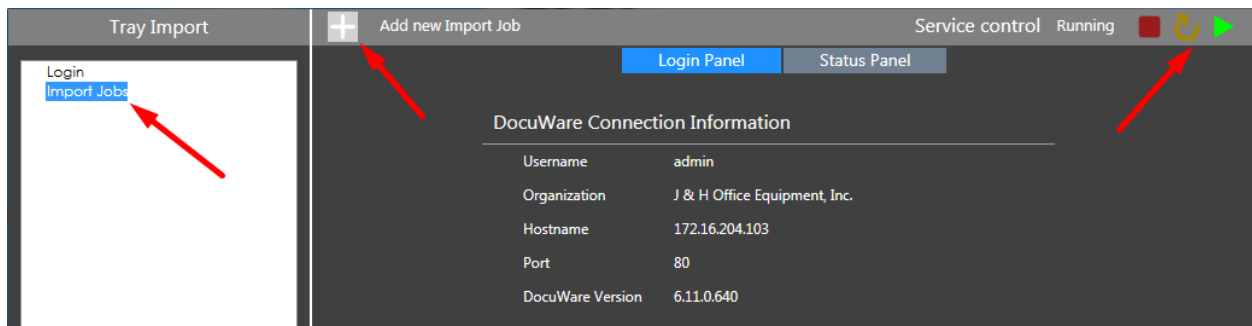
Click the browse button to select the correct license file from Windows Explorer.

## Starting Document Tray Import

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



The Document Tray Import 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. To create a configuration either select the menu item and click the '+' button or right click the menu item and select 'New Import Job'.



## Connecting to DocuWare Cloud

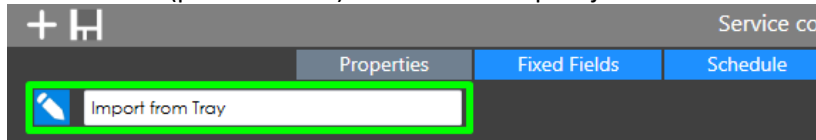
Document Tray Import works with DocuWare Cloud. Enter the DocuWare Cloud server URL, Organization, and DocuWare Cloud login credentials, then click 'Connect'. These credentials are the same as the credentials for the DocuWare Cloud Web Client.

The screenshot shows a 'DocuWare Login' form. At the top, there are two tabs: 'Login Panel' (selected) and 'Status Panel'. The form title is 'DocuWare Login'. Below the title are two checkboxes: 'Windows Login' (unchecked) and 'DocuWare Login' (checked). The form fields are: 'Server' with the value 'https://jhoec.docuware.cloud/docuware/platform'; 'Organization' with a dropdown menu showing 'J & H Office Equipment, Inc.'; 'Username' with the value 'admin'; and 'Password' with a masked field '\*\*\*\*\*'. Below the password field is a 'Remember Login' checkbox (checked). A blue 'Connect' button is centered below the form. At the bottom of the form area, there is a message: 'Please enter your login credentials and click the connect button'.

## Import Job Configuration – File Cabinet

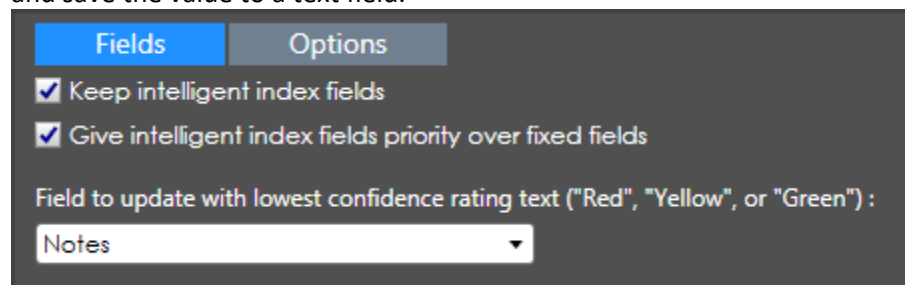
### Setup

- 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

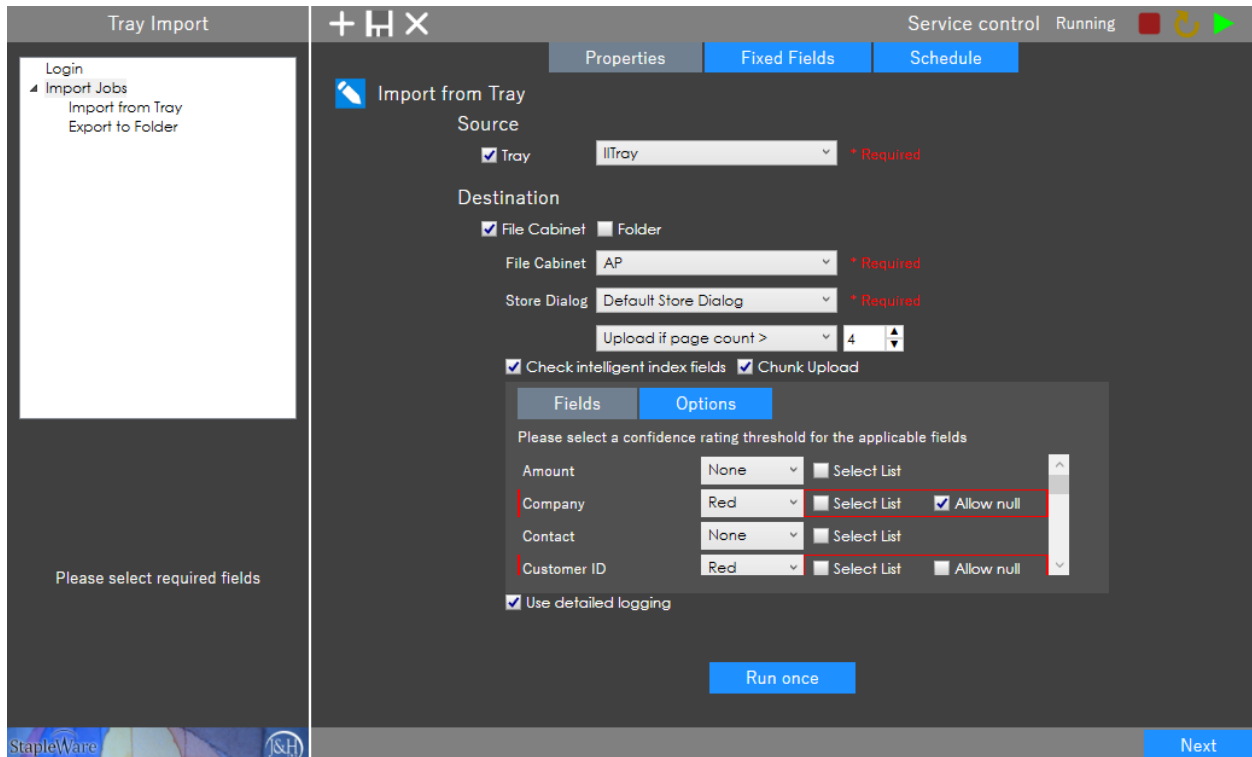


### Properties

- 3) **Source** – Select the correct DocuWare document tray to monitor for documents to import
- 4) **Destination** – Select 'File Cabinet' to import the documents into a DocuWare file cabinet. Select 'Folder' to export the documents to a local or network folder path.
- 5) **Chunk Upload** – Check to chunk upload documents. This will make Tray Import function faster than non-chunk uploading
- 6) **Page Count** – Check the number of pages before uploading. If page count doesn't match the specified criteria then the document will be skipped
- 7) **Check intelligent index fields** – Evaluate Intelligent Index field confidence rating to decide if the documents should be imported
  - a. Select a confidence rating for the intelligent index fields that need to be validated. Fields with a defined confidence rating will pass the confidence criteria if the defined confidence rating is met. Check the 'Allow null' checkbox to allow the field to be empty. Fields that have a confidence rating of 'None' will not be validated.
  - b. **Options**
    - i. **Keep intelligent index fields** – Uses all intelligently indexed fields to index documents that are stored into the file cabinet
    - ii. **Give intelligent index fields priority over fixed fields** – The Intelligent Index field will overwrite a fixed entry for the field.
    - iii. **Field to update with the lowest confidence rating** – Take the lowest confidence rating (Red, Yellow, or Green) from all Intelligent Index fields for each document and save the value to a text field.



- 8) **Use detailed logging** – Add extra detail to the log file.

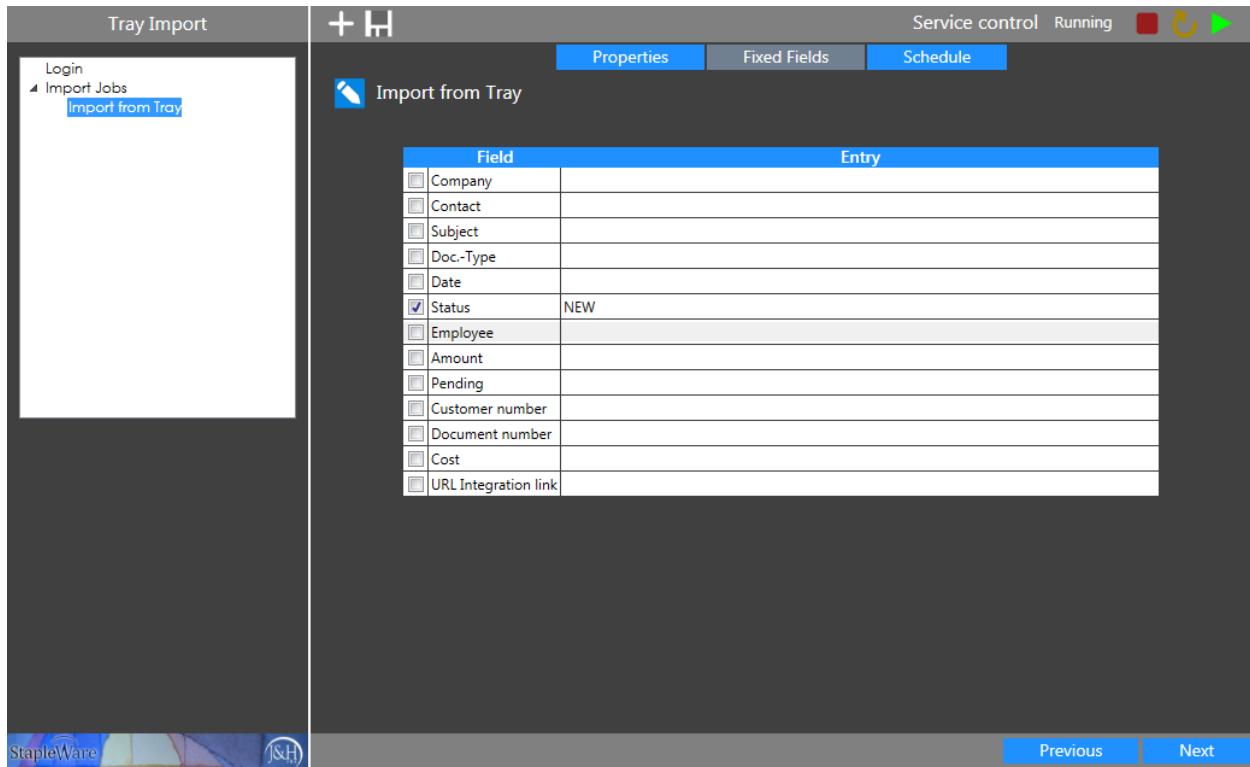


Click 'Next' to move to the 'Fixed Fields' tab.

### Fixed Fields

- 9) Select the checkbox next to the field to enable it for fixed entry
- 10) Type in the fixed entry value in the Entry text box for the field



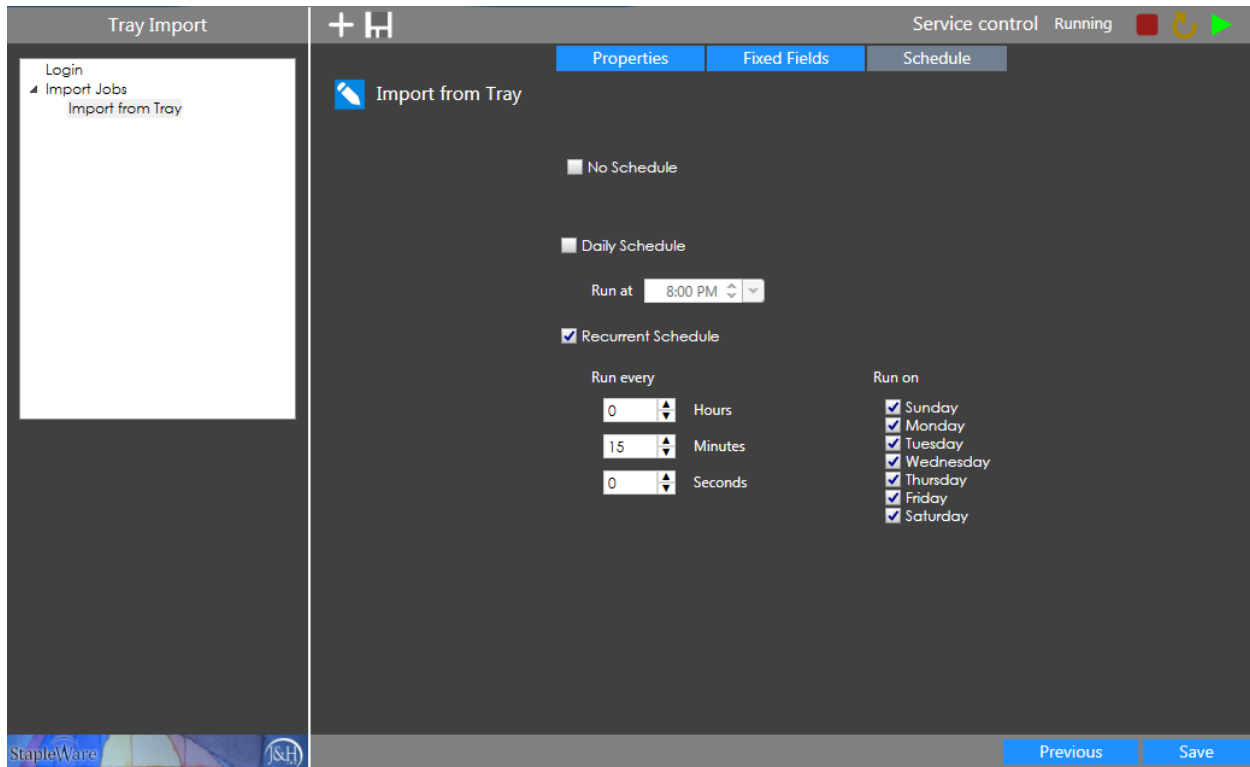


Click 'Next' to move to the 'Schedule' tab.

## Schedule

This tab is used to schedule the job to run automatically according to a defined schedule

- 11) **No schedule** – The job is not active.
- 12) **Use daily scheduler** – The job will run once every day at the specified time.
- 13) **Use recurrent scheduler** – The job will run on the specified days at the specified time interval.



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

## Import Job Configuration – Folder

Import Job configurations can export documents from a DocuWare document tray to a local or network folder path.

### Properties

Check the 'Folder' checkbox to export documents to a folder, then browse to the export folder path. Intelligent Index and Fixed Entries are not retained for a folder export, however, Intelligent Index fields can still be validated for the correct confidence rating before exporting.

Tray Import

Service control Running

Properties Schedule

Import from Folder

Source

Tray

StapleWare Tray \* Required

Destination

File Cabinet  Folder

StapleWare \* Required

Check intelligent index fields

Fields

Please select a confidence rating threshold for the applicable fields

Field	Confidence Rating	Allow null
DocName	Red	<input checked="" type="checkbox"/>
Company	Green	<input type="checkbox"/>
Status	Yellow	<input checked="" type="checkbox"/>
DocType	Green	<input type="checkbox"/>

C:\Document Repository ... \* Required

General Options

Use detailed logging

Run once

Next

Click 'Next' to configure the Job Schedule, then click 'Save'.