

Autoform DM Web Doc Import - Version 10.0

Alex Clemons - 2024-01-09 - Comments (0) - Autoform DM General Information

Autoform DM

Document Import

The Document Import tool is a highly flexible and streamlined web-based application for the ad hoc indexing and importing of documents into Autoform DM.

Video Tutorial

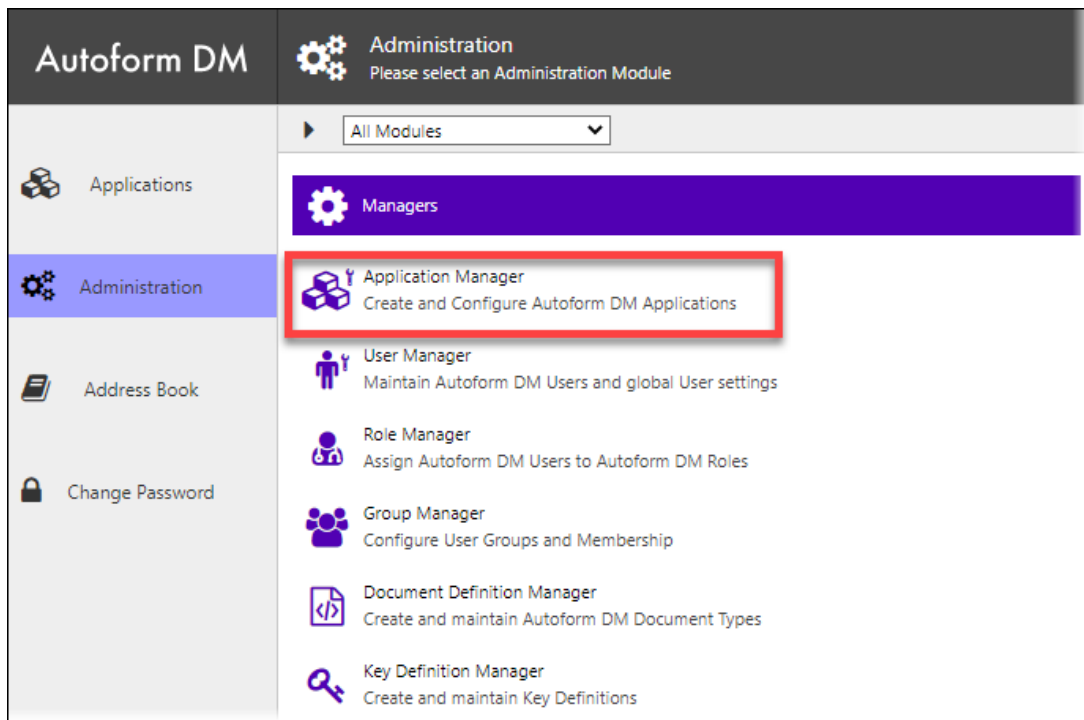
Learn how to set up and use the feature with the help of our video tutorial. Click the **Watch Video** button below:



To set up and use the tool, follow these steps:

A Document Definition should already be created with Key Definitions bound to it.

1. Open Autoform DM, select the **Administration** button and click **Application Manager**.



2. Select **New Application** and then select the **Document Import (V2)** checkbox.

The screenshot shows the 'New Application - Basic Details' configuration screen. The left sidebar lists 'Basic Details', 'File Types', 'Import Keys', 'Group Access', 'User Access', and 'App. Manager'. The main area is titled 'New Application - Basic Details' and prompts the user to 'Please configure a name and description for this Application'. The 'Application Type' section has four options: 'Document Search' (unchecked), 'Document Import (V2)' (checked and highlighted with a red box), 'Static SQL Search' (unchecked), and 'Static SQL Import' (unchecked). The 'Label' section has a text input field containing 'Invoice Import'. The 'Name' section has a text input field containing 'invoice-import'. The 'Description' section has a text area containing 'import invoices with key data'. The 'Show application on home screen' checkbox is checked. The 'Document Definition' section has a dropdown menu showing 'Account Statement'. At the bottom, there are 'Cancel' and 'Next' buttons.

3. Enter a label that will also produce a unique name.

4. Add a description in the **Description** field for the application and ensure the **Show application on home screen** checkbox is selected.

5. Click the **Document Definition** dropdown and select a definition that should be associated with this application.

6. Click **Next**.

File Types

Here you should list file extensions that can be imported, separated by commas (eg .pdf,.xml,.pcl).

1. In the **Allowed File Types** box, enter a file type.

2. Click **Next**.

Import Keys

The Import Keys screen allows for specific keys to be used in conjunction with the Document Import.

New keys are automatically populated with the keys assigned to the Document Definition, however, if you do not require all keys to be imported you can edit which keys are shown in the list.

To add a key binding, click the **Add Key Binding** button.

Autoform DM Invoice Import - Import Keys
Configure the document import keys

+ Add Key Binding

Cancel Back Next

Basic Details

File Types

Import Keys

Group Access

User Access

App. Manager

Within each key you can select the **Input Type** of either Text or a Dropdown list, whether the user can edit the key, whether a value is required before saving the document, a default value and also whether the key is visible to the user.

Once you have made your preferences, click **Next**.

Autoform DM Invoice Import - Import Keys
Configure the document import keys

+ Add Key Binding

Account Number Up Down Delete

Select Key
Select the key to add
String Account Number

Input Type
Select the type of input this field will use
Text Input

Default Value
Enter a default value for this field

Read-only
Check the box to make this field read-only

Required
Check the box to disallow a blank value

Hidden
Check the box to make this field hidden

Cancel Back Next

Basic Details

File Types

Import Keys

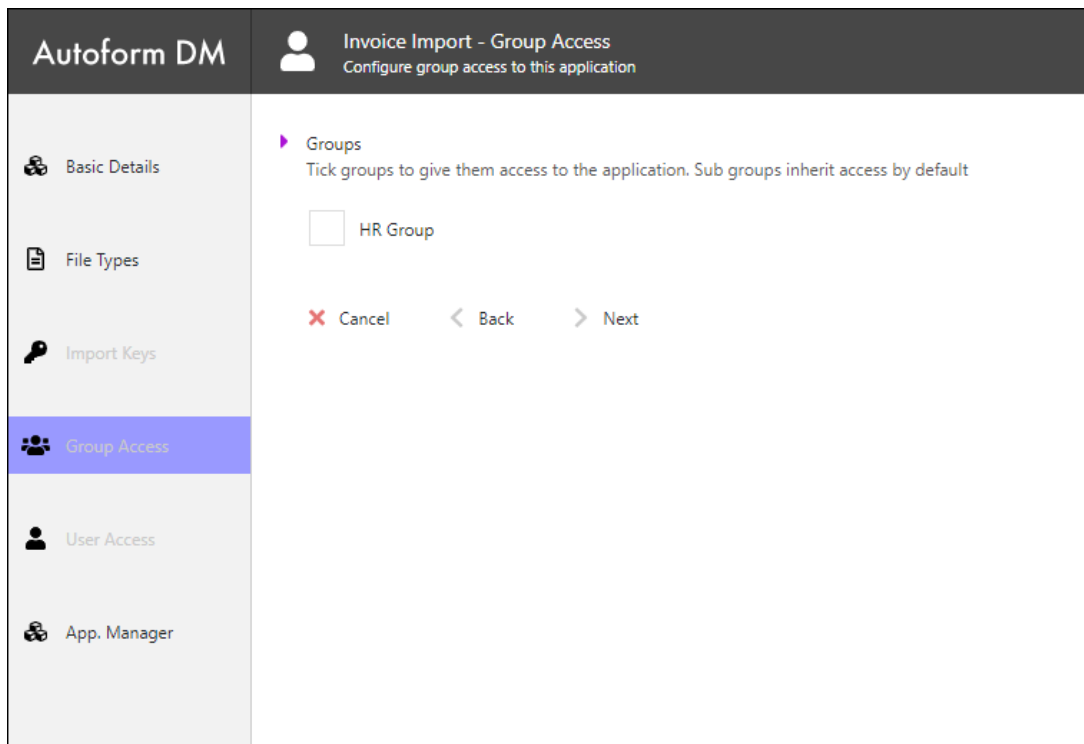
Group Access

User Access

App. Manager

Group Access

Select the group(s) you wish to give access to the application and then click **Next**.



Autoform DM Invoice Import - Group Access
Configure group access to this application

Groups
Tick groups to give them access to the application. Sub groups inherit access by default

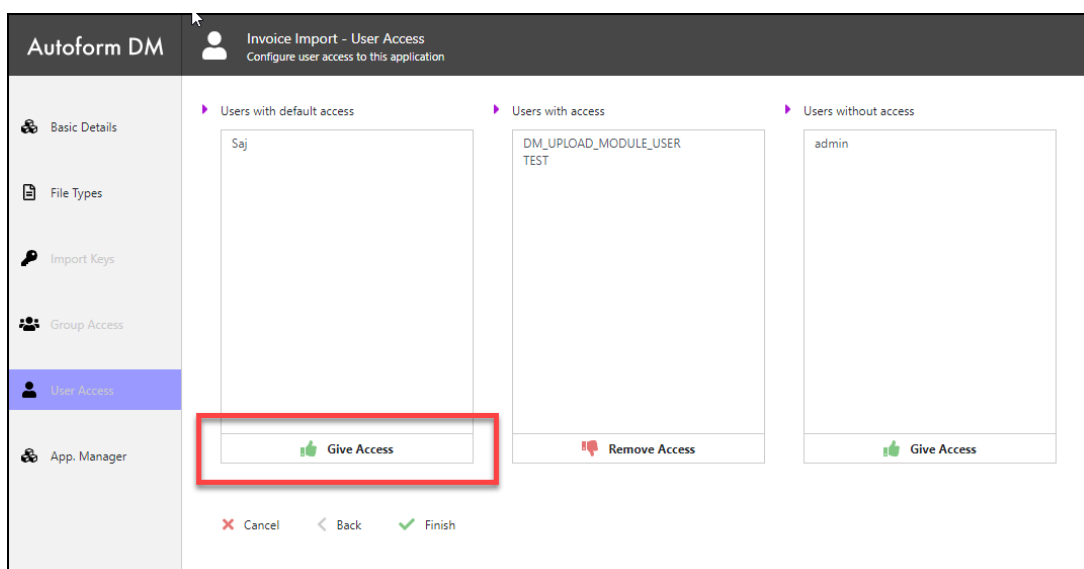
☐ HR Group

✖ Cancel < Back > Next

User Access

This page allows you to configure user access to the application.

Use the hand icons to give or remove access and then click **Finish**.



Autoform DM Invoice Import - User Access
Configure user access to this application

Users with default access

Saj

Users with access

DM_UPLOAD_MODULE_USER TEST

Users without access

admin

Give Access Remove Access Give Access

✖ Cancel < Back ✓ Finish

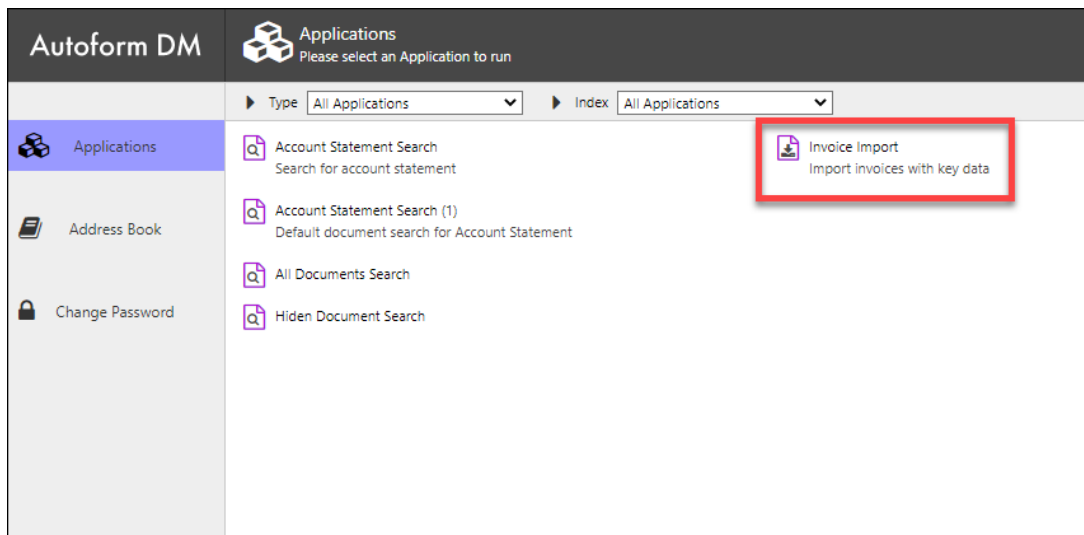
Once the Import is saved it is now accessible to users.

Using the application

The user needs to sign into Autoform DM and follow these steps:

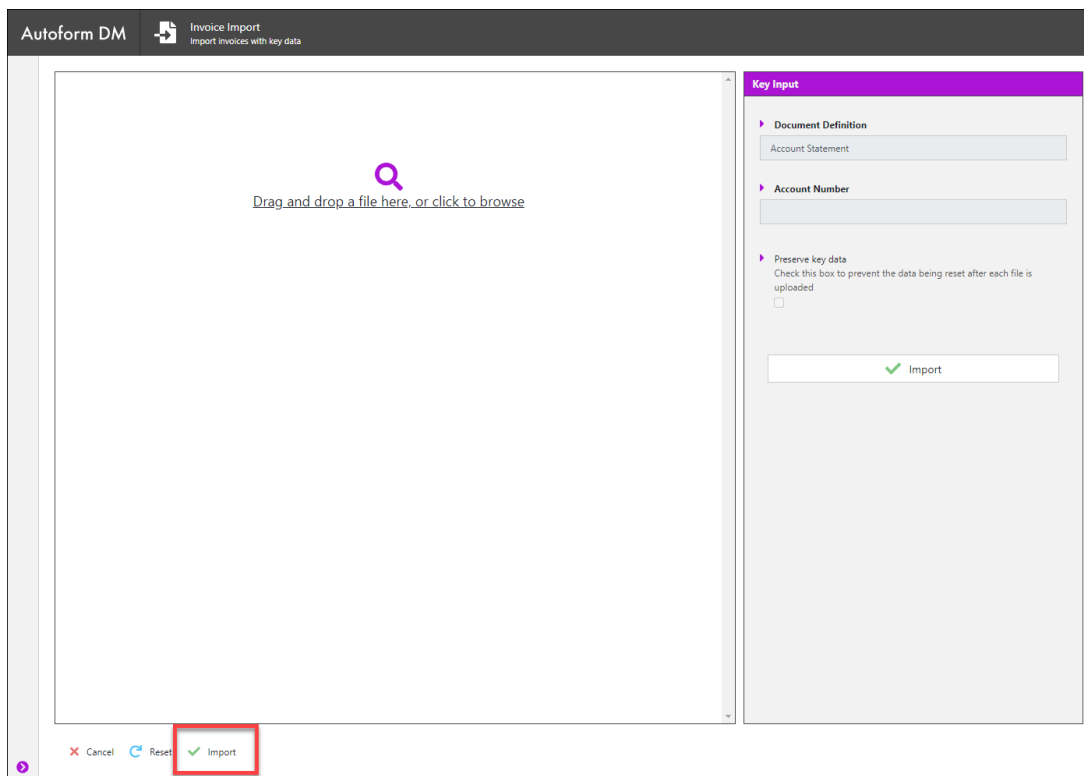
1. Click the **Administration** button and select **Applications**.

The newly created application is in the list:



2. Select the application to display the *Import* screen.

3. Here users can drag and drop files or import files using the **Import** button to navigate to a file.



4. Once the file is uploaded the user can then enter the key data that was assigned to the import, and click Import to import the document. This can be repeated as many times as needed.

Opening via URL

As well as opening the Web Doc Import via the Autoform DM front end, users can create a link to open the Import directly as well as pass some parameters to pre-fill some of the fields.

The format of these URLs is:

`http://SERVERNAME:PORT/dm/apps/document-import/IMPORT-NAME?seed=use-query-params&key-KEY-NAME=KEY-VALUE&key-KEY-NAME=KEY-VALUE`

The *IMPORT-NAME* value is found in the “Name” field on the Import:

The screenshot shows the 'Invoice Doc Import - Basic Details' form in the Autoform DM application. The left sidebar contains navigation links: Basic Details (selected), File Types, Import Keys, Group Access, User Access, and App. Manager. The main content area has three sections: 'Label' with a text input containing 'Invoice Doc Import', 'Name' with a text input containing 'invoice-doc-import' (highlighted by a red box), and 'Description' with a large text area.

The *KEY-NAME* values need to be keys that are bound to the Import:

Autoform DM Invoice Doc Import - Import Keys
Configure the document import keys

Basic Details

File Types

Import Keys

Group Access

User Access

App. Manager

Import Keys

Invoice Number

Select Key
Select the key to add

String Invoice Number

Input Type
Select the type of input this field will use

Text Input

Default Value
Enter a default value for this field

123

Read-only
Check the box to make this field read-only

☐

Required
Check the box to disallow a blank value

☒

Hidden
Check the box to make this field hidden

☒

Import Date

Confirm Reset Cancel

The *Name* value can be picked up from the Key Definitions screen:

Autoform DM Key Definition 'Invoice Number' - Basic Details
Enter the basic details for the key definition

New Key Definition

Basic Details

Bindings

Back to Selection

Data Type:

String Number Date

Cardinality:

Document Key LineItem Key

Label:

Invoice Number

Name:

invoice-number

Delete Reset Save

Date keys can also be used in the URL with the dates using the format 'yyyy-mm-dd'.

If multiple keys are needed, they can be added by using the **&** symbol to separate them.

Using the above import called "invoice-doc-import" with three keys:

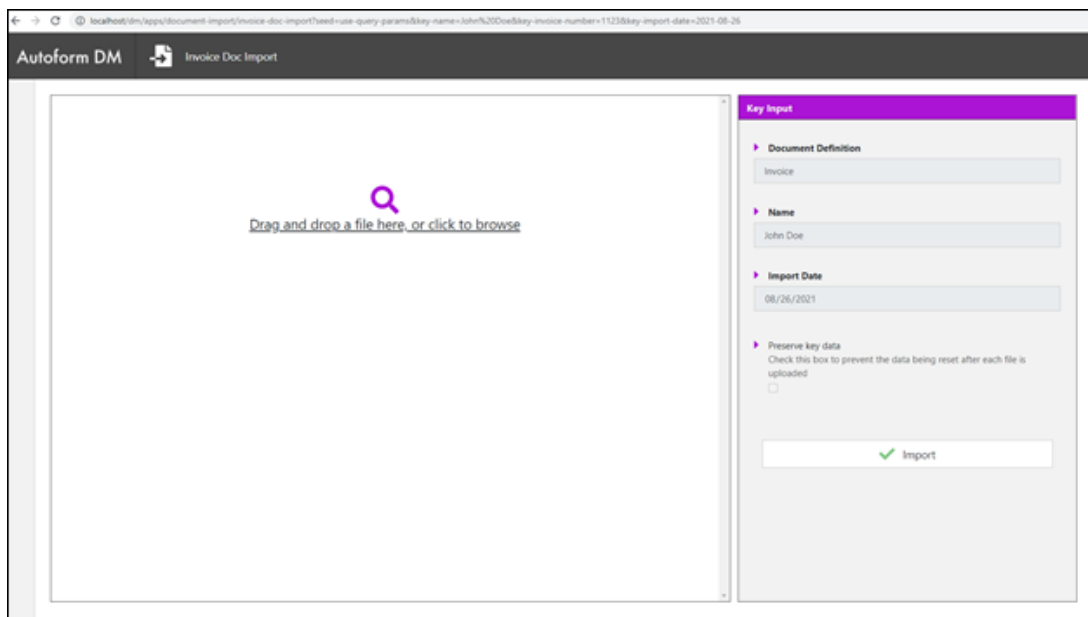
String Key - name

Number Key - invoice-number

Date Key - import-date

the following URL can be constructed:

<http://localhost:80/dm/apps/document-import/invoice-doc-import?seed=use-query-params&key-name=John%20Doe&key-invoice-number=1123&key-import-date=2021-08-26>



The screenshot shows a web application interface for document import. The main area is a large white box with a magnifying glass icon and the text "Drag and drop a file here, or click to browse". To the right is a sidebar titled "Key Input" with a purple header. It contains three sections: "Document Definition" with a text input field containing "Invoice"; "Name" with a text input field containing "John Doe"; and "Import Date" with a text input field containing "08/26/2021". Below these is a "Preserve key data" section with a checkbox and the text "Check this box to prevent the data being reset after each file is uploaded". At the bottom of the sidebar is a green "Import" button with a checkmark icon.

The values in the URL are automatically pre-filled in the Import.

Additional Information

- In this case, the key *invoice-number* is a hidden key that will import with the value into the URL.
- If a Default Value was set, this will overwrite the values passed via the URL.
- Spaces and other special symbols will need to be encoded to be passed into a URL.

Related Content

- [Video: How to use the Document Import tool](#)