

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

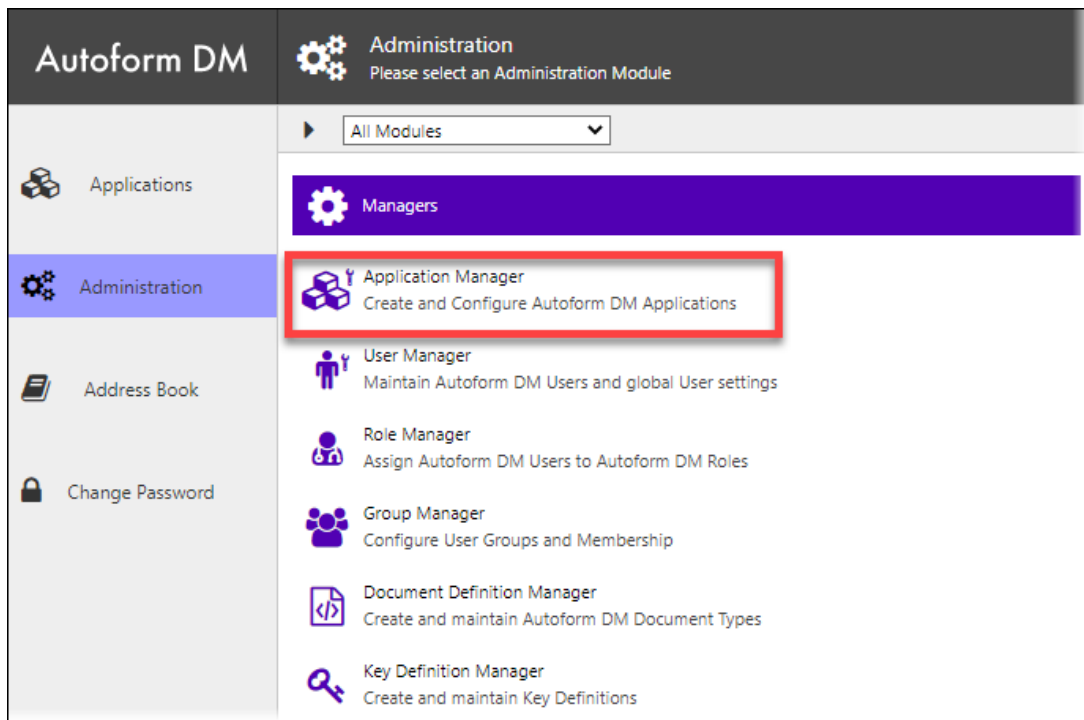
Learn how to set up and use the feature with the help of our video tutorial. Click the **Watch Video** button below:



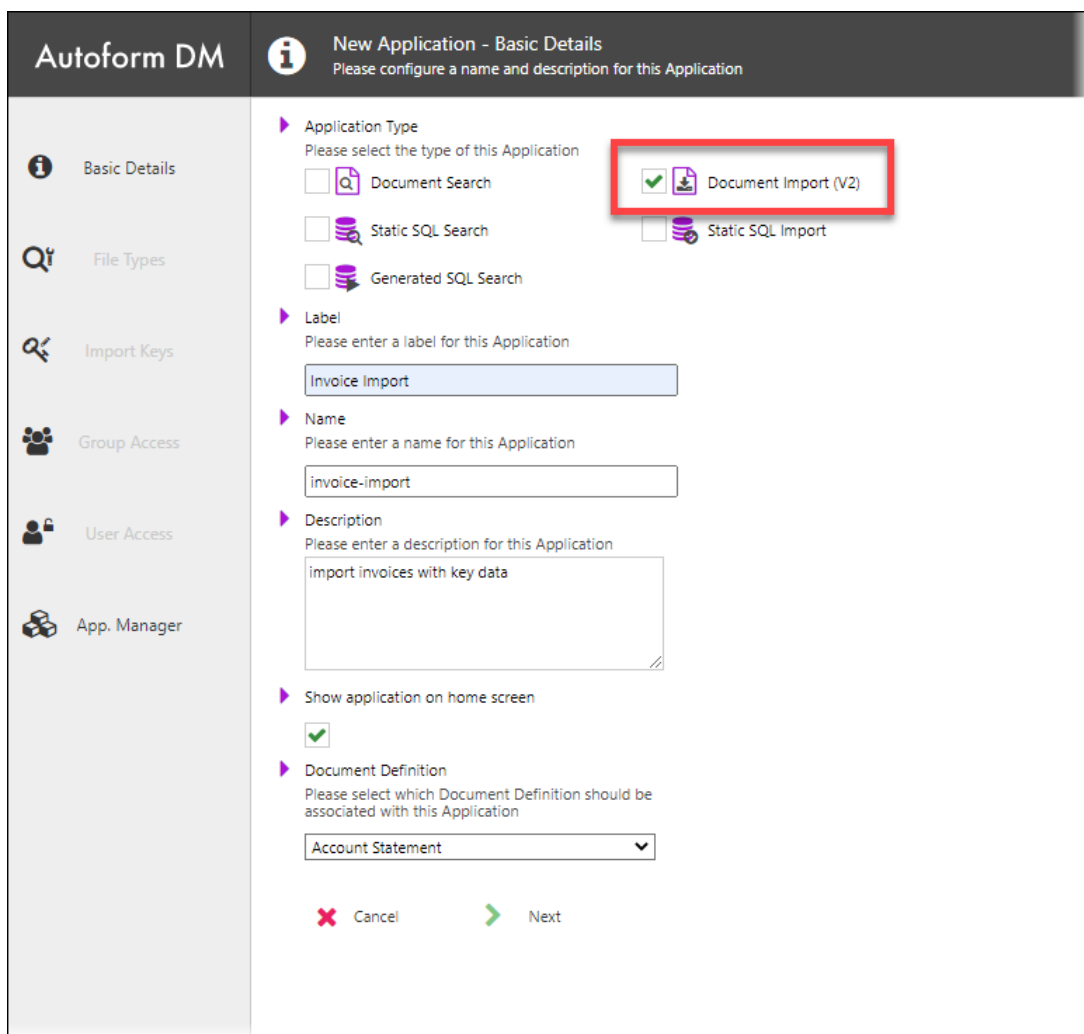
To set up and use the tool, follow these steps:

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.



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.

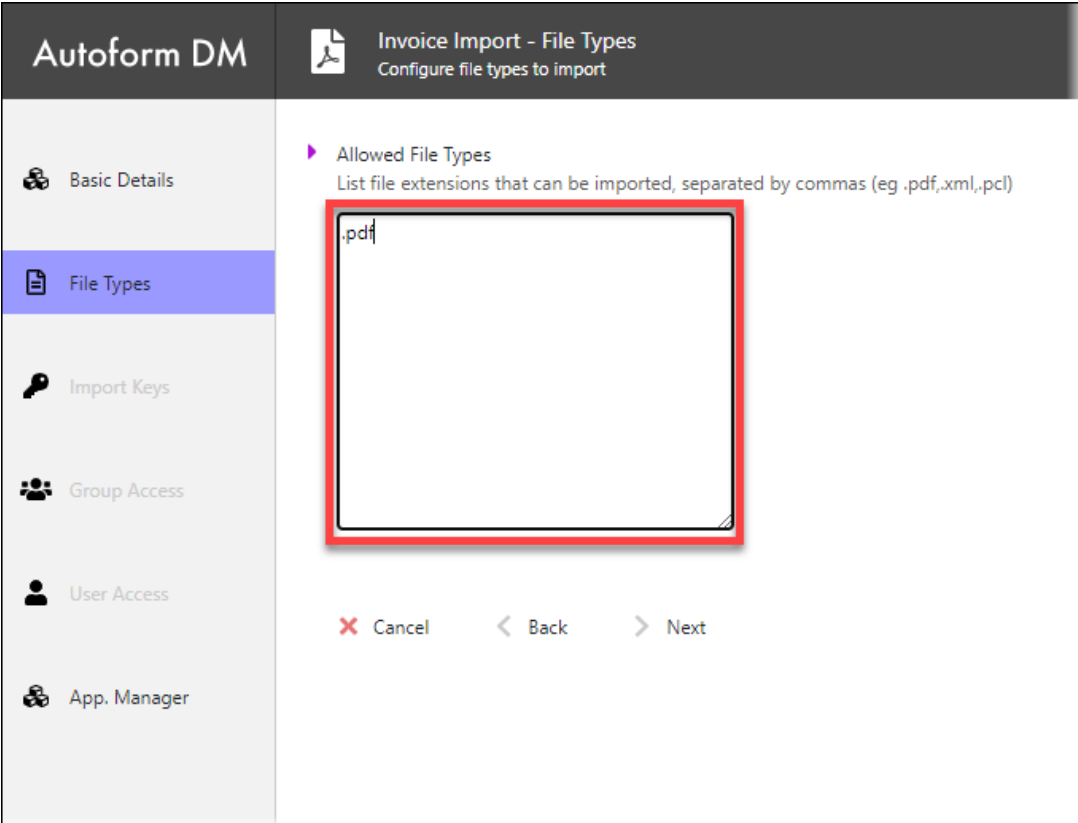
5. Click the **Document Definition** dropdown and select a definition that should be associated with this application.

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.



The screenshot displays the 'Autoform DM' interface for configuring file types for an 'Invoice Import' application. The left sidebar shows navigation options: Basic Details, File Types (highlighted), Import Keys, Group Access, User Access, and App. Manager. The main content area is titled 'Invoice Import - File Types' and 'Configure file types to import'. It features a section for 'Allowed File Types' with a text input field containing '.pdf'. Below the input field are buttons for 'Cancel', 'Back', and 'Next'.

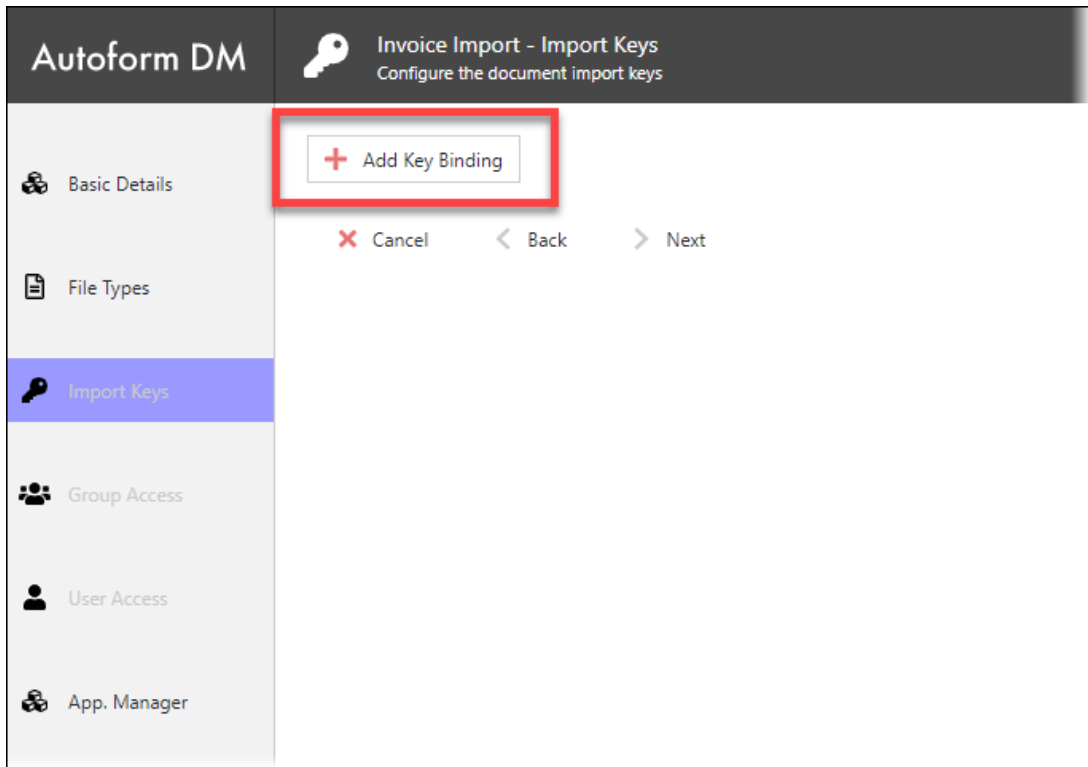
2. Click **Next**.

Import Keys

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

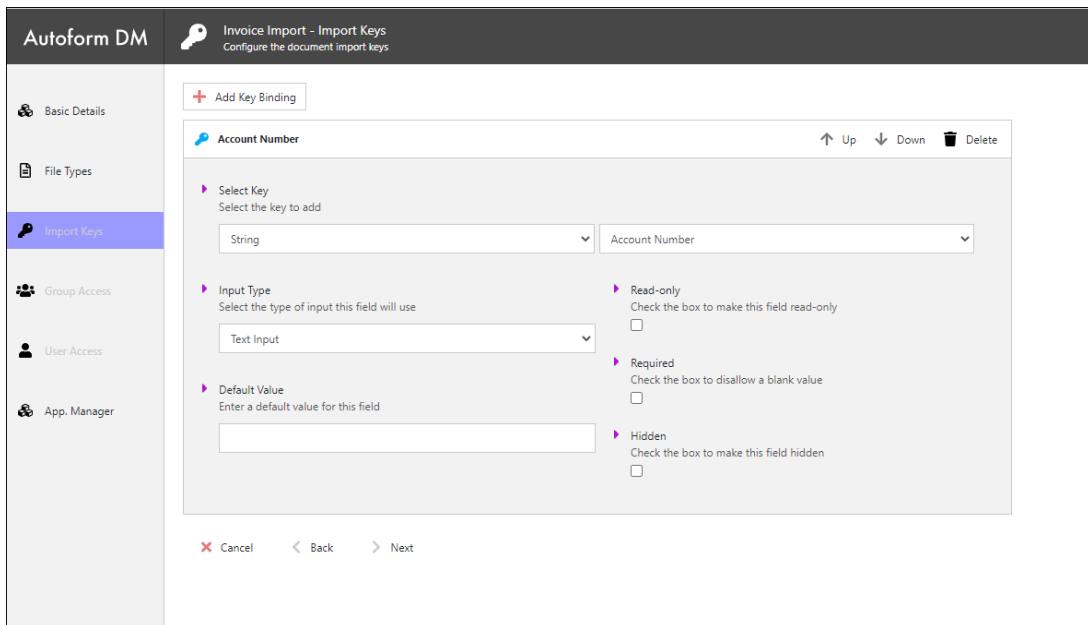
New keys are automatically populated with the keys assigned to the Document Definition, however, if you do not require all keys to be imported you can edit which keys are shown in the list.

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



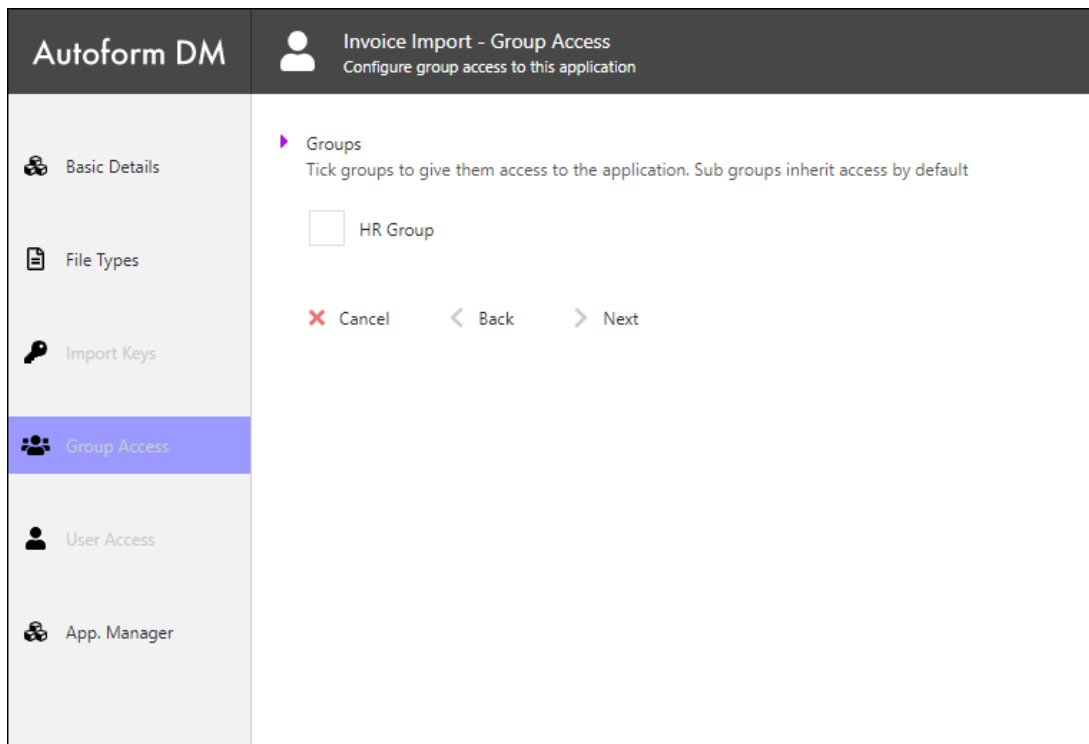
Within each key you can select the **Input Type** of either Text or a Dropdown list, whether the user can edit the key, whether a value is required before saving the document, a default value and also whether the key is visible to the user.

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



Group Access

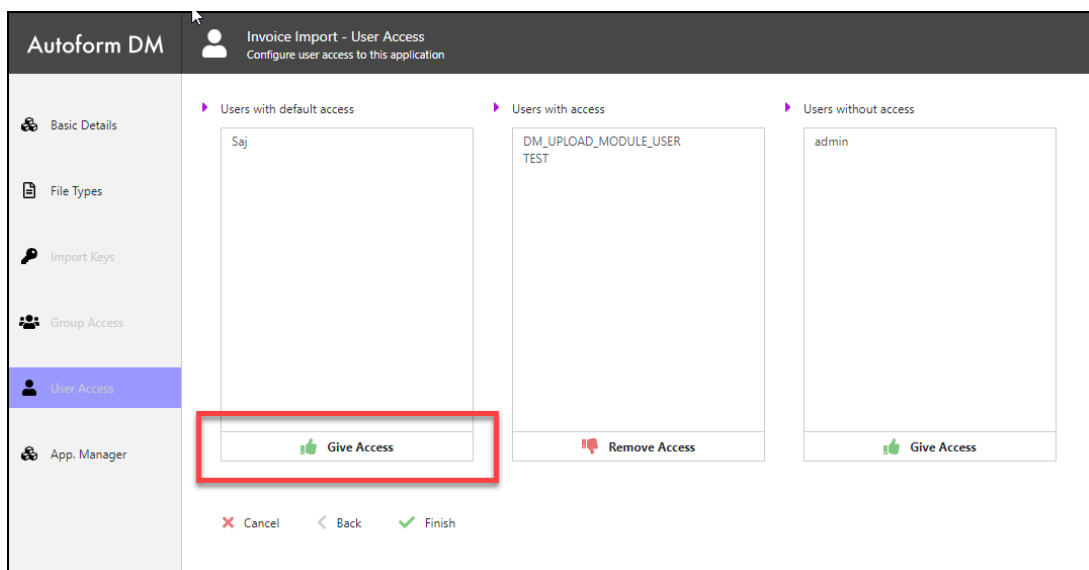
Select the group(s) you wish to give access to the application and then click **Next**.



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**.



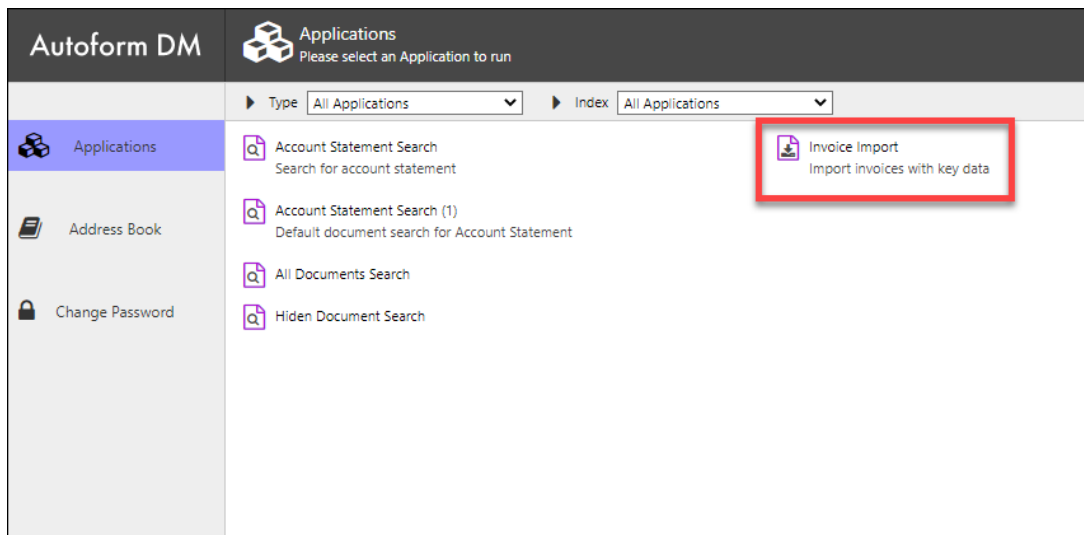
Once the Import is saved it is now accessible to users.

Using the application

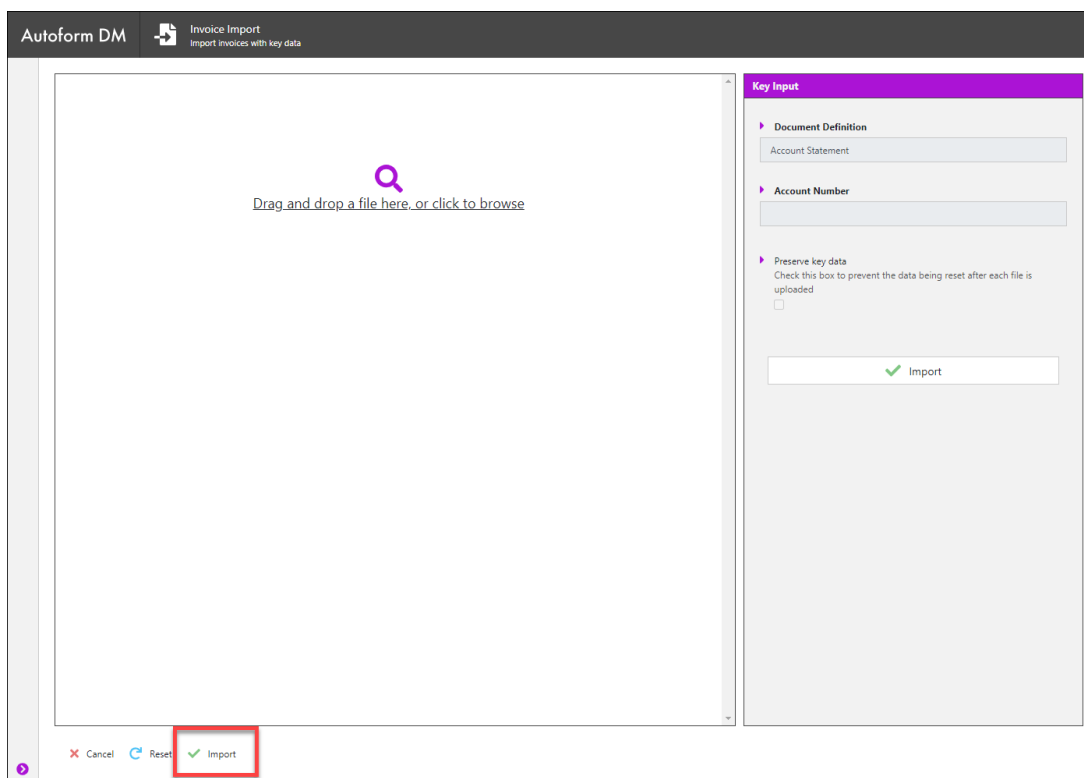
The user needs to sign into Autoform DM and follow these steps:

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.

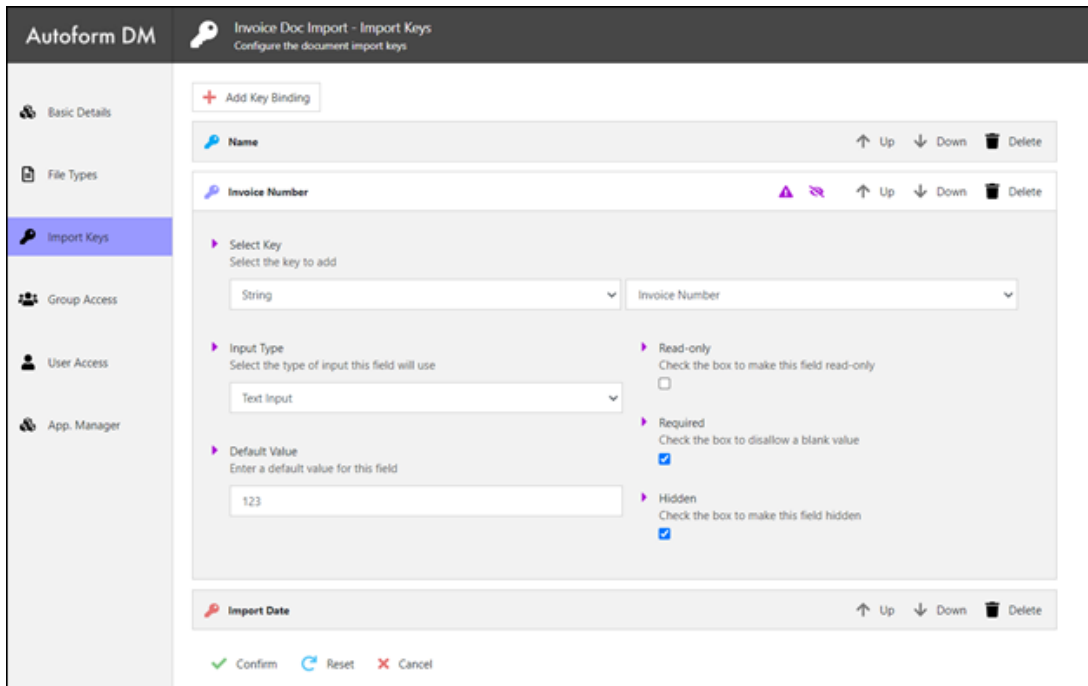
The format of these URLs is:

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

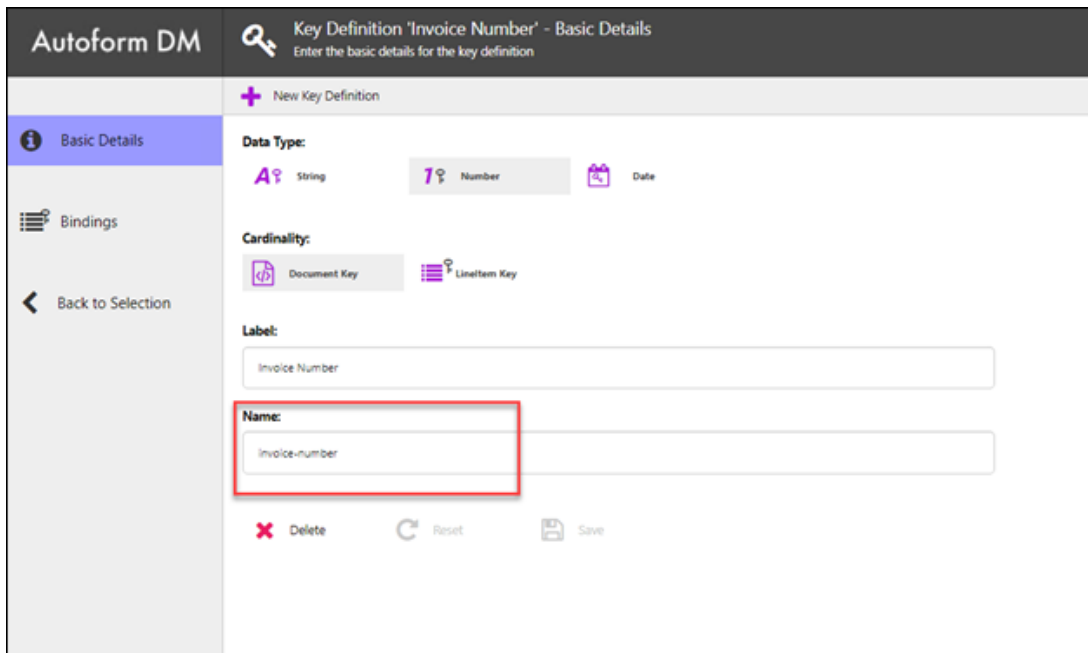
The *IMPORT-NAME* value is found in the “Name” field on the Import:

The screenshot shows the 'Invoice Doc Import - Basic Details' form in the Autoform DM interface. The left sidebar contains navigation options: Basic Details (selected), File Types, Import Keys, Group Access, User Access, and App. Manager. The main content area has a dark header with the title 'Invoice Doc Import - Basic Details' and a subtitle 'Select an Autoform DM application'. Below the header, there are three sections: 'Label' with a text input field containing 'Invoice Doc Import'; 'Name' with a text input field containing 'invoice-doc-import', which is highlighted with a red rectangular box; and 'Description' with a large text area.

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



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



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:

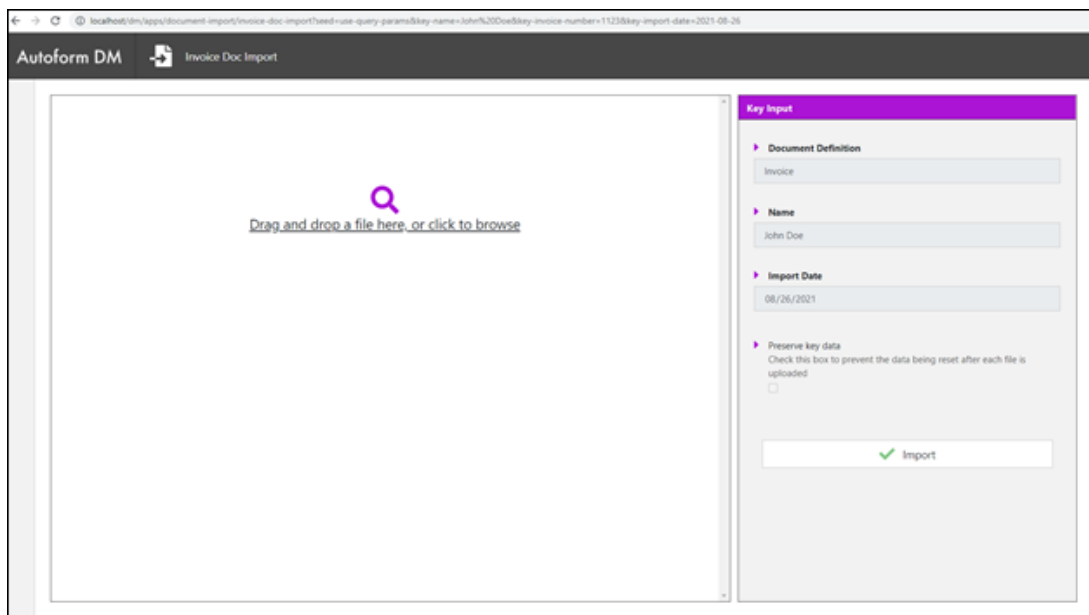
String Key – name

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 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](#)