



KWizCom Corporation



iMUSH

Information Management Utilities for SharePoint

Scanning Feature

User Guide

CONTENTS

Contents	2
Product Overview.....	3
Why did we build it?	4
Key Features.....	4
Installation Guide	5
Software Requirements	5
Server Requirements.....	5
Client Requirements.....	5
Installation Procedure.....	5
SharePoint 2013-2019.....	5
post Installation.....	6
SharePoint 2013-2019.....	6
Un-Installation Procedure	7
SharePoint 2013-2019.....	7
Administration Guide	8
Configuring general scanning settings	8
General	8
Scanning Files	11
KWizCom Scan Client	15
Application Programming Interface (API)	16
Client-side API	16

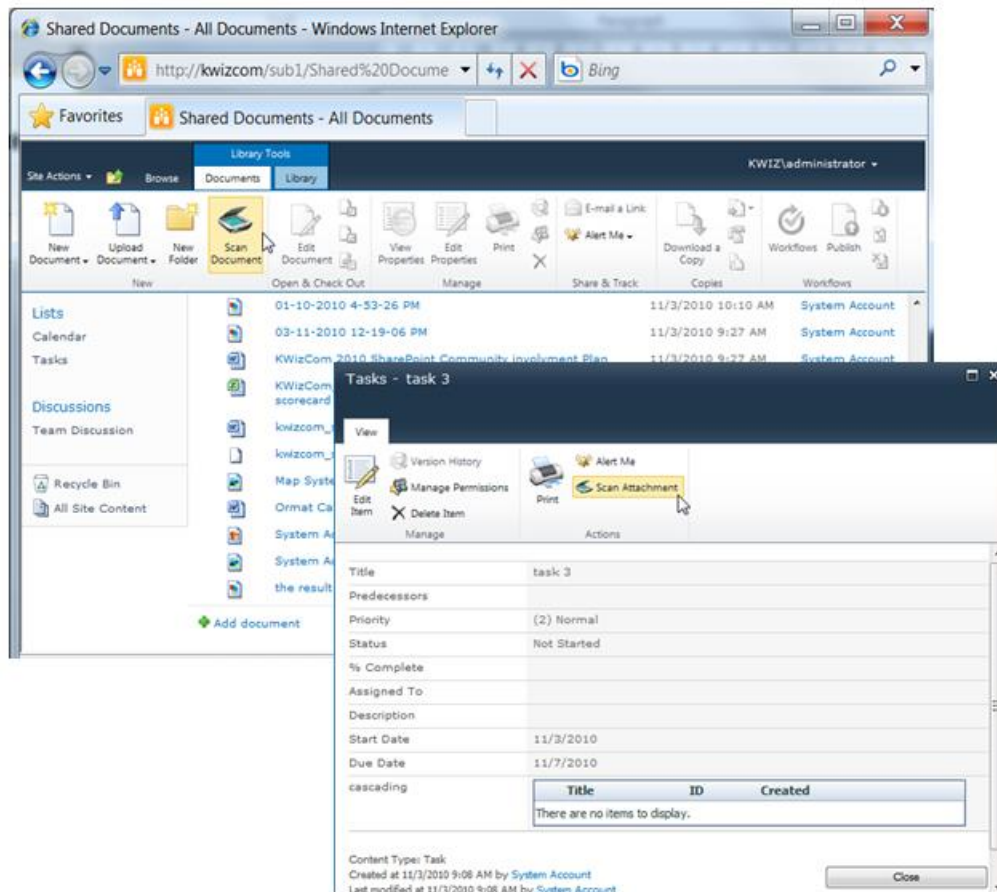
PRODUCT OVERVIEW

iMUSH Scanning Feature is part of the [iMUSH Bundle](#)

Scan and upload documents to SharePoint – the easy way!

With *iMUSH - Scan* You can easily scan papers into single or multiple documents, define property-values and upload the scanned documents – all in a single click!

Without leaving your SharePoint interface, you can easily scan documents into a library, or attach them to a list item, by using well integrated scanning menus:



WHY DID WE BUILD IT?

Many organizations which already decided on moving to paperless information management still find themselves having to manage large amounts of papers on a daily basis.

Scanning documents and uploading them to SharePoint is a process that takes a lot of time (scan to local folder, upload each scanned document and tag it), thus making it very difficult to store information originated from papers, into SharePoint.

iMUSH-Scan solves the SharePoint scanning issue by adding the missing “Scan” menus for libraries and lists, and by enabling batch scanning and tagging of documents – all in a single click!

KEY FEATURES

Feature	iMUSH-Scan standard
Seamlessly integrated with SharePoint User Interface	✓
Cross-browser and cross-operating system (uses Java to interface with the local scanner instead of explorer-only ActiveX)	✓
Supports TWAIN and WIA scanners (local or network)	✓
Output file format: TIFF, JPEG, GIF, BMP, PDF, PNG	✓
Enables batch paper scanning to produce multiple documents (create a separate document for each scanned page)	✓
Enables uploading documents to libraries / attaching scanned documents to list items	✓
Enable preview scanned file before saving it to SharePoint	✓
Enable saving a local copy of the scanned file/s	✓
Enable zipping a scanned file before uploading it to SharePoint	✓
Does NOT require MS Office installation or scanning utilities	✓
Batch document properties update in a single operation	✓
Enables using tokens for auto-naming of scanned files	✓

INSTALLATION GUIDE

SOFTWARE REQUIREMENTS

SERVER REQUIREMENTS

- SharePoint 2013-2019

CLIENT REQUIREMENTS

- Windows 10+
- Microsoft Internet Explorer, Microsoft Edge, Mozilla Firefox, Google Chrome - Latest versions

INSTALLATION PROCEDURE

SHAREPOINT 2013-2019

1. Log in as SharePoint administrator account to your SharePoint front-end server.
2. Browse the product's page on KWizCom's website and click the "Go" link under the "Install using our Web Installer" section.

This will start the KWizCom web installer.

Note: The KWizCom Web Installer will automatically offer you to upgrade other existing KWizCom products on your farm, in case you have old versions installed. You can check which products you wish to update at this time.

3. In case you prefer just to download the relevant .wsp packages and manually deploy them, then in the web installer UI check the "Download only" option (3rd page in the installer's wizard). When the installer finishes you will be able to go to the installer's folder on your server, and install the KWizCom packages by simply running the "SP-WSPInstaller" PowerShell script.
4. At the end of the installation process, you should see all packages deployed in the **Central Admin >System settings>Manage Farm Solutions** page, and the KWizCom SharePoint Foundation package should be deployed also in the Central Admin's web application.

POST INSTALLATION

SHAREPOINT 2013-2019

1. After you have successfully deployed the required iMUSH product/s,
The following features will be activated on farm level: (You can disable them on farm level and activate them only for the desired site collections):
 - a. KWizCom iMUSH – Scan
 - b. KWizCom SharePoint iMUSH settings

	KWizCom iMUSH – Files information Management Utilities for SharePoint (iMUSH) provides set of utilities that enhance the work with documents and records in SharePoint. iMUSH - Files provides support for advanced file function for documents and lists.	<input type="button" value="Activate"/>
	KWizCom iMUSH – Print information Management Utilities for SharePoint (iMUSH) provides set of utilities that enhance the work with documents and records in SharePoint. iMUSH - Print provides support for advanced printing for documents and lists.	<input type="button" value="Activate"/>
	KWizCom iMUSH – Scan information Management Utilities for SharePoint (iMUSH) provides set of utilities that enhance the work with documents and records in SharePoint. iMUSH - Scan streamlines the document scanning and uploading to SharePoint process.	<input type="button" value="Activate"/>
	KWizCom SharePoint iMUSH settings Activate this feature to get a site level and list level settings for iMUSH scan, print and files features.	<input type="button" value="Activate"/>

2. When you click the “Scan” ribbon button for the 1st time, you will be prompted to install 2 executables:
 - a. KWizCom Client Agent
 - b. KWizCom Scan Client

These two executables enable the scanning feature to interact with the desktop: communicate with the connected scanners, save scanned files locally, zip them if required (according to settings), and upload the scanned files to SharePoint libraries/lists.

When prompt, you should allow the 1-time installation of these two executables.

UN-INSTALLATION PROCEDURE

SHAREPOINT 2013-2019

1. Retract and remove the solution using SharePoint central admin or by using stsadm/powershell command line.

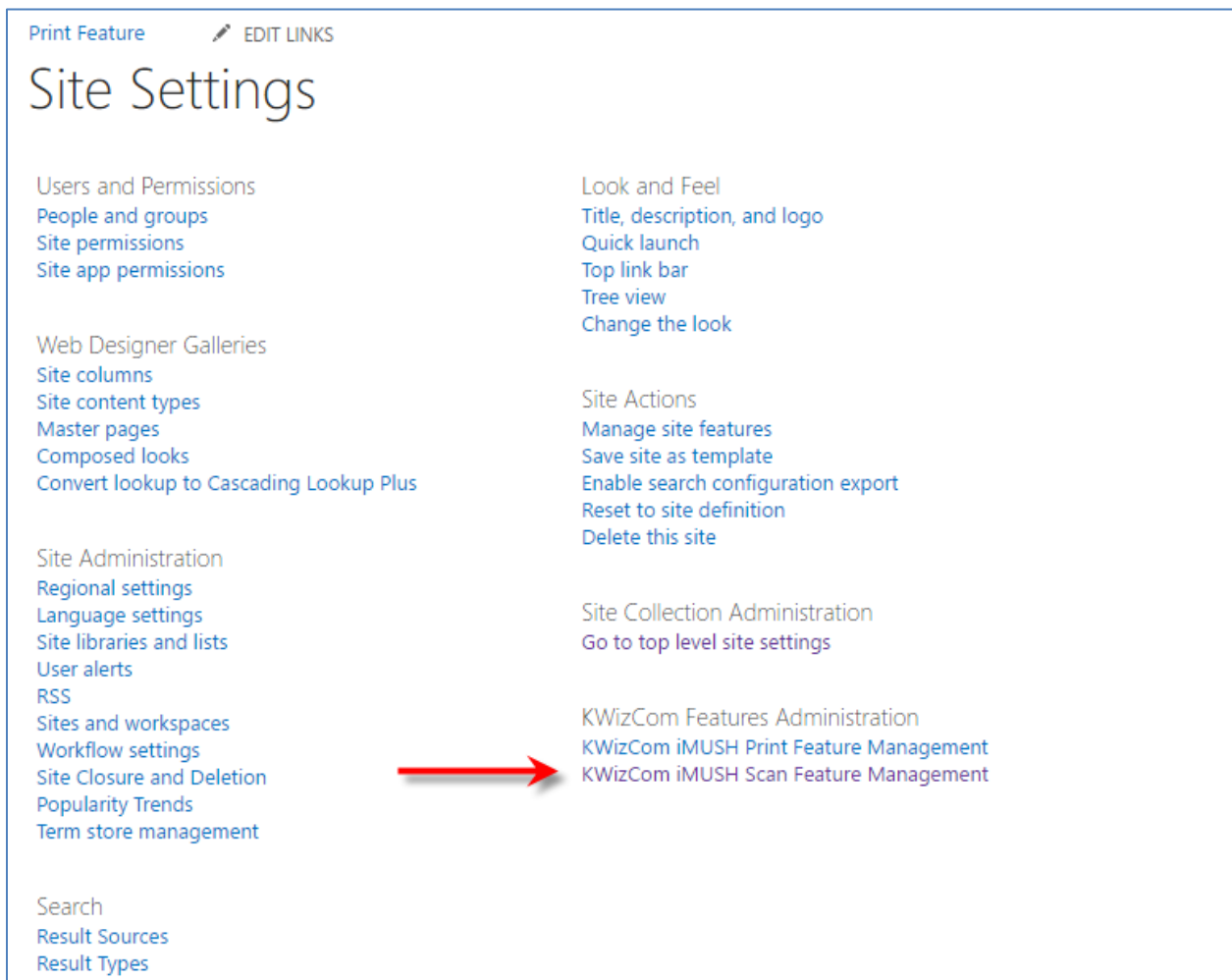
ADMINISTRATION GUIDE

CONFIGURING GENERAL SCANNING SETTINGS


GENERAL

As an administrator, you can configure various scanning settings in a site level. All lists & libraries in a site inherit their scanning settings from the site.

In Site Settings page, click the “KWizCom iMUSH Scan Feature Management” link:



The screenshot shows the 'Site Settings' page with a grid of categories and links. A red arrow points to the 'KWizCom iMUSH Scan Feature Management' link under the 'KWizCom Features Administration' category.

- Print Feature  EDIT LINKS
- Site Settings
- Users and Permissions
 - People and groups
 - Site permissions
 - Site app permissions
- Web Designer Galleries
 - Site columns
 - Site content types
 - Master pages
 - Composed looks
 - Convert lookup to Cascading Lookup Plus
- Site Administration
 - Regional settings
 - Language settings
 - Site libraries and lists
 - User alerts
 - RSS
 - Sites and workspaces
 - Workflow settings
 - Site Closure and Deletion
 - Popularity Trends
 - Term store management
- Search
 - Result Sources
 - Result Types
- Look and Feel
 - Title, description, and logo
 - Quick launch
 - Top link bar
 - Tree view
 - Change the look
- Site Actions
 - Manage site features
 - Save site as template
 - Enable search configuration export
 - Reset to site definition
 - Delete this site
- Site Collection Administration
 - Go to top level site settings
- KWizCom Features Administration
 - KWizCom iMUSH Print Feature Management**
 - KWizCom iMUSH Scan Feature Management

Once you click that link, you’ll be redirected to the iMUSH Scanning Settings page:

Print Feature ✎ EDIT LINKS

iMUSH Settings ?

Scan Settings

Use this section to define global scan settings that will apply to all lists and libraries in the current site collection.

Auto-generate file name

Auto-generated file name format:

The auto-generated file name of the scanned document may include the following tokens:

- [Date]- current date
- [Time]- current time
- [User]- current user
- [ScanCnt]- scanning counter

Overwrite existing document(s)

Show scanner dialog

Check this property if you want the scanner dialog to show on every scan operation.

Allow users to perform multi-document scan

Check this property if you want to enable users to scan multi-page documents.

Default scan output format:

Compress files bigger than **MB before upload**

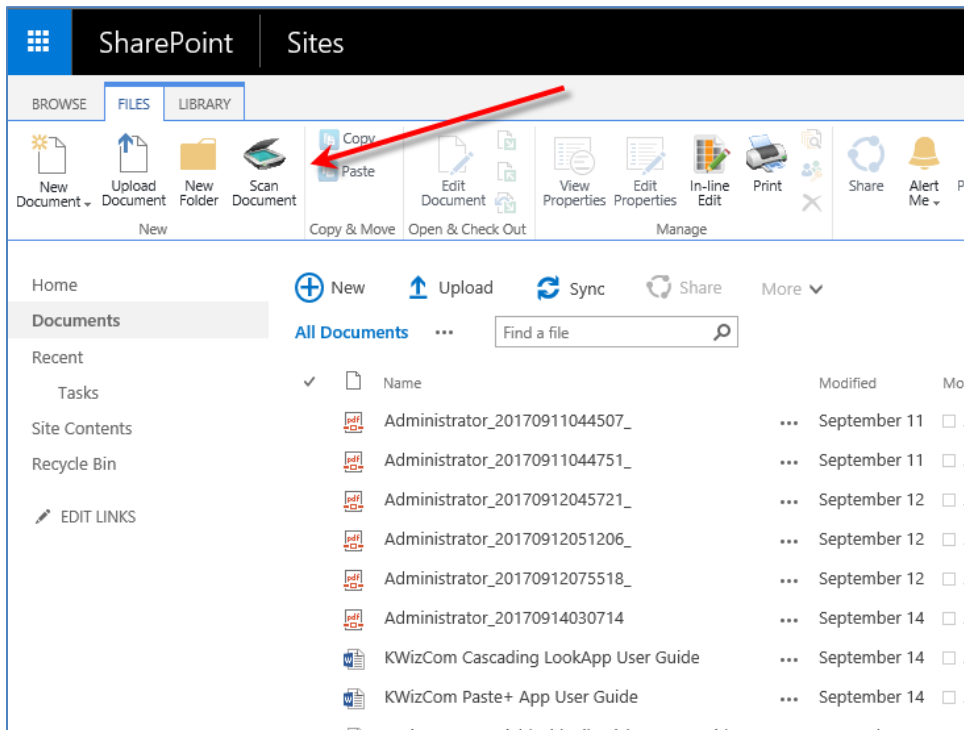
The following table describes the page’s various properties:

Property	Description
Auto-generate file name	By using this property you can define a default value for scanned documents. You can use some dynamic tokens: [Date], [Time], [User] and [ScanCnt] that can be included as part of the scanned file name.
Overwrite existing documents	Check this property if you wish to overwrite an existing document with the same name as the file you’re scanning.
Show scanner dialog	Check this property if you wish to display the Scan settings dialog to end-users when they click “Scan”. This allow end-users to configure various scan settings according to their preferences. Uncheck this property if you want end-users to have a quick scan, i.e: when end-users click “Scan” no settings dialog will be displayed, scan will be done according to the default library/list settings instead.
Allow users to perform multi-document scan	Check this option if you wish to enable users to perform bulk-scan operation which produces a separate document per each scanned page.
Default scan output format	Define the default scan output format (TIFF, JPEG, PDF etc.)

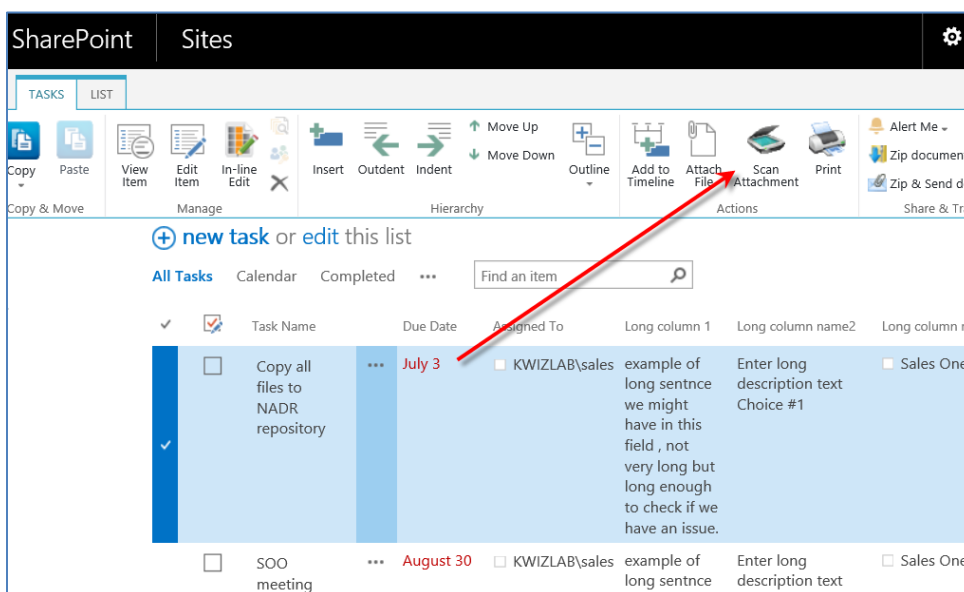
Compress files bigger than	Check this property and fill out the minimum file size, which any scanned file bigger than this size will be zipped before saved to SharePoint.
----------------------------	---

SCANNING FILES

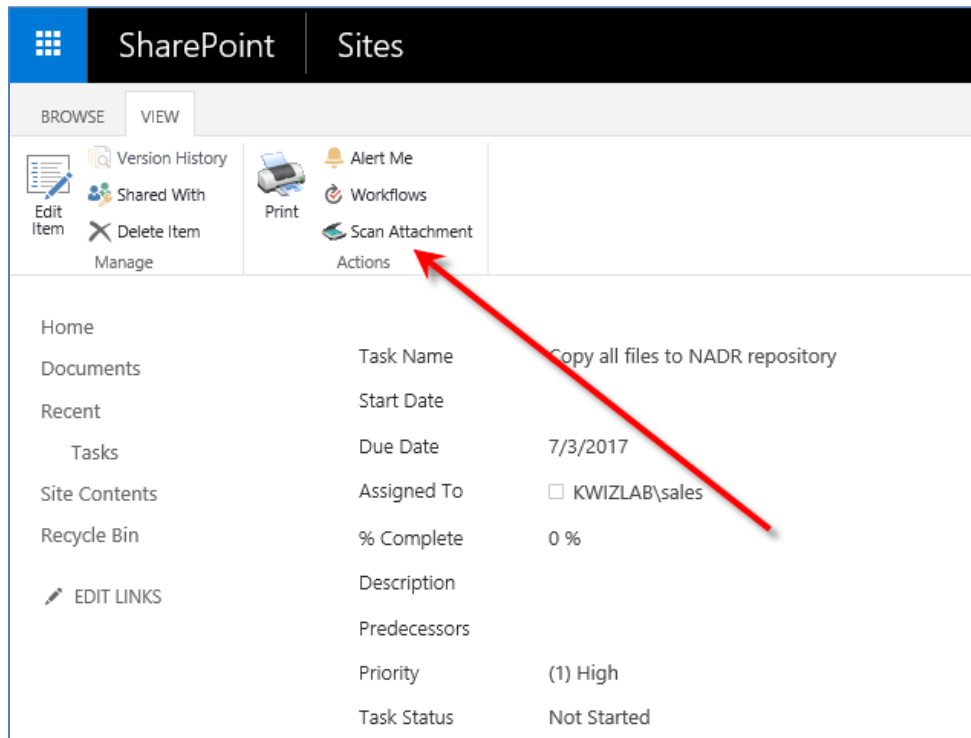
In SharePoint 2013-2019 library views you have the Scan menu available in the ribbon:



For lists – in the list view when selecting an item:



And in the list item edit/view pages:



When clicking the “Scan” button (and “Show scanner dialog” property checked), user will see the following scanner dialog:

Scan Document

Scan Output Format
Set the scanned file's output format

File output format: PDF

Produce Single/Multiple Files
When scanning a multi-page document, define if you want it to produce a single file or a file for each scanned page.

Single/Multiple Files

Single file
 A file per-page

File Name
Define the scanned file(s) name(s)

File Name * :
[User][Date][Time]

The file name of the scanned document may include the following tokens:
[Date]- current date
[Time]- current time
[User]- current user

Overwrite existing document(s)
Check to overwrite existing file with the same name.

Overwrite existing document(s)

Scanner Profile: virtual scanner [Create new profile](#)

Scan Scan & Preview Cancel

These options enable the user to configure the scan settings:

- File format
- Scan all pages as a single file, or produce a file per-page
- Configure file name pattern by using various supported tokens
- Overwrite existing document with the same name
- Select Scanner profile.

IMPORTANT: 1st time you use iMUSH-Scan you will have to create a scanner profile by clicking [this link](#).

User can then choose between clicking “Scan” and clicking “Scan & Preview”.

“Scan” will activate the scanner and upload the result document/s to your library/list item.

“Scan & Preview” will open the [Scan client](#) that allows the you to preview the scanned file and perform additional actions before uploading it to SharePoint (See details about the Scan Client in the next section).

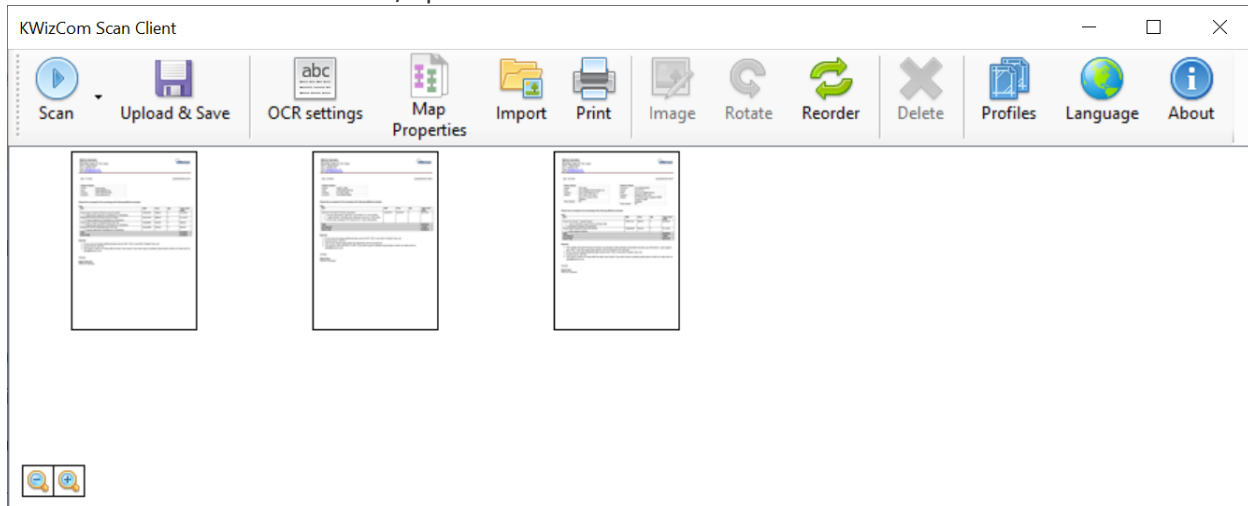
KWIZCOM SCAN CLIENT

Part of KWizCom Scan feature is the *Scan Client* software. This utility is installed on every end-user's desktop when clicking the "Scan" ribbon button for the 1st time.

So how does it work?

When end-user clicks the "Scan" toolbar button in the SharePoint library, the scanner will start scanning your papers, and a file/s will be created locally on your desktop.

You will then see the created file/s preview in the Scan Client window:



To save the created file/s in your SharePoint library/list item simply click the "Upload & Save" button. The Scan Client also includes OCR and Zonal-OCR features, which enable property value extraction from the scanned papers. More details are available in the [KWizCom Scan Client online documentation](#).

APPLICATION PROGRAMMING INTERFACE (API)

This section describes the iMUSH-Scan programming interface which enables programmers to activate iMUSH-Scan by using their code.

CLIENT-SIDE API

iMUSH-Scan includes a client-side javascript API. By using this API you can scan documents, upload them and fill-out their properties.

The API format is:

```
iMush.StartScan({scanMode:silent,targetLibrary:"Shared Documents",
presetValues:{Title:"Test",Status:"In Progress"}}).then(... customer code ...);
```

Where:

- **scanMode** parameter has several options:
 - silent – don't ask the user anything (use target library's settings), show only scan progress indicator. When scan is completed the file is uploaded to the target library.
 - normal – show iMUSH-Scan settings page. This enables the user setup all the settings and also preview the scanned file if he wants.
 - preview – don't show the iMUSH-Settings page, show only scan progress indicator. After scan completes – show a preview of the scanned file before uploading.
- **TargetLibrary** = [Name or Full Url of library] (upload documents to this library). Name would look for library in current site, while full URL will upload to that specific folder (so, will support sub folders).
- **PresetValues**=[JSON formatted key/value] (a collection of values to set to the scanned document that will be saved to the matching document properties)

Example:

The following html code renders a button that when clicked calls iMUSH-Scan in "silent" mode, the result file is uploaded to "Shared Documents" library in the current site, and updates the document's properties.

```
<input type="button" value="Scan Silent"
onclick='KWizCom.iMUSH.Scan.StartScan({scanMode:"silent",targetLibrary:"Share
d Documents", presetValues:{Title:"Test",Status:"In Progress"}, success:
function(res){alert(res.data);}, canceled:
function(data){alert("canceled");}, error:
function(err){alert(err.message);}});'/>
```