



KWizCom Corporation



# iMUSH

**Information Management Utilities for SharePoint**

# Scanning Feature

User Guide

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## INTRODUCTION

### GENERAL

This document provides all the information needed to install, evaluate and deploy this KWizCom product:

- Introduction
- Installation Guide
- Administrator Guide
- FAQ

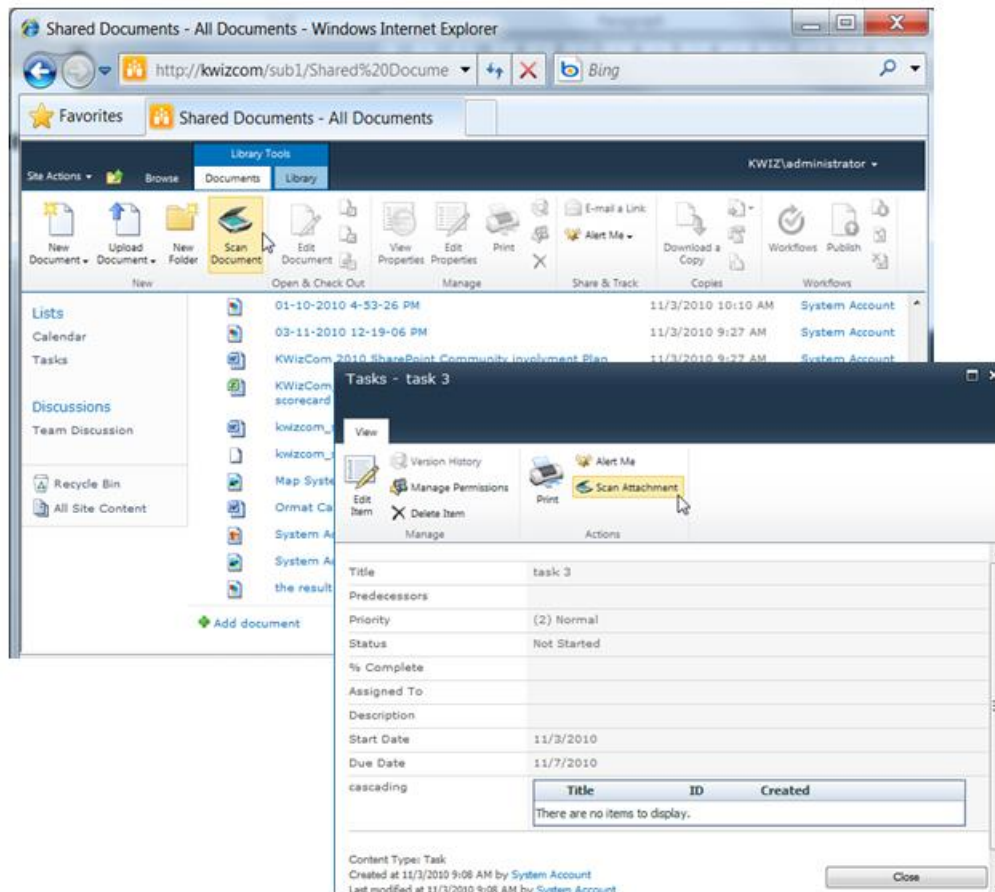
## PRODUCT OVERVIEW

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 | SharePoint 2007/2010/2013 /2016 |
|---|---------------------|---------------------------------|
| 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   | √                   |                                 |

\* Not available in the SP2007 version

## INSTALLATION GUIDE

### SOFTWARE REQUIREMENTS

#### SERVER REQUIREMENTS

- SharePoint 2007 / WSS 3.0 or
- SharePoint Server/Foundation 2010/2013/2016

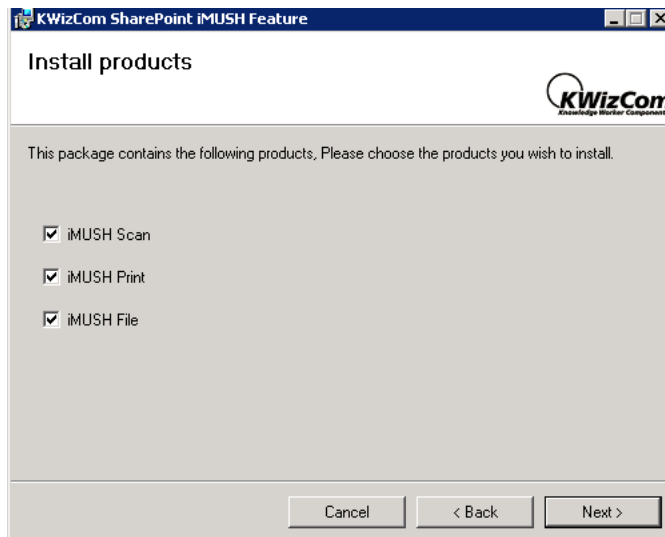
#### CLIENT REQUIREMENTS

- Windows 8+
- Microsoft Internet Explorer 9+, Mozilla Firefox (Latest version), Google Chrome (Latest version), Safari (Latest version).

### INSTALLATION PROCEDURE

#### SHAREPOINT 2007

1. Log in using SharePoint administrator account to your SharePoint front-end server.
2. Download the product's latest evaluation version from KWizCom's internet web site. This evaluation version is fully functional for 30 days. Further details about product activation can be found in the Administrator guide (next section).
3. Unzip the product's zip file on your SharePoint server.
4. Double-click the .msi file in order to begin the web installation.
5. The installation includes all the products which are part of the iMUSH suite:



Please select only the products that you wish to install and click “Next”.

6. When the installation process is complete it will recycle all application pools automatically.

---

## SHAREPOINT 2010/2013/2016

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.

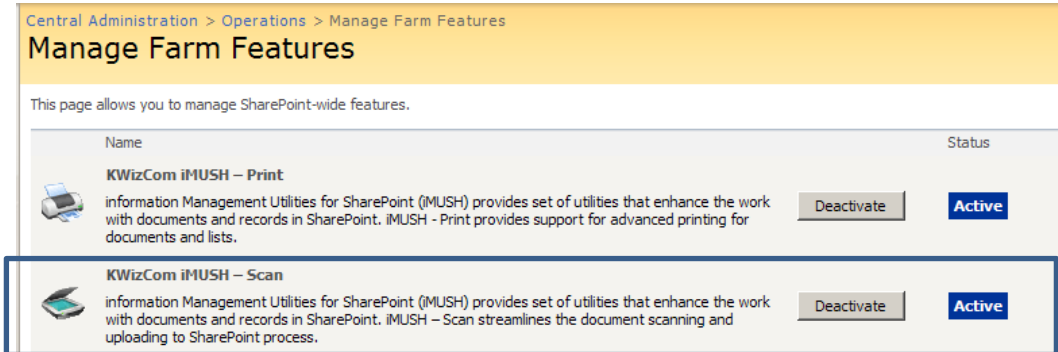
**Note:** The KWizCom Web Installer will automatically offer you to upgrade other existing KWizCom products on your farm, in case you have old versions installed. You can check which products you wish to update at this time.

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 (3<sup>rd</sup> 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 2007





1. After completing the installation, you will see a new KWizCom entry in Windows **Start -> All Programs -> KWizCom-> KWizCom iMUSH**
2. The installation adds all iMUSH features to the farm level and to site collection level. By default the Farm level features are active, enabling you to start using this feature immediately:



3. In case you wish this feature to be available only in a specific site collection, disable the farm feature, and enable the site collection feature.

### SHAREPOINT 2010/2013

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

|   |  |          |
|---|--|----------|
|  | <b>KWizCom iMUSH – Files</b><br>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. | Activate |
|  | <b>KWizCom iMUSH – Print</b><br>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.      | Activate |
|  | <b>KWizCom iMUSH – Scan</b><br>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. | Activate |
|  | <b>KWizCom SharePoint iMUSH settings</b><br>Activate this feature to get a site level and list level settings for iMUSH scan, print and files features.  | Activate |

2. When end-user tried for the 1<sup>st</sup> time to scan by clicking the “Scan” button in the ribbon, he will be prompted to install 2 executables:
  - a. KWizCom Client Agent
  - b. KWizCom Scan Agent

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, user should allow the 1-time installation of those executables.

## UN-INSTALLATION PROCEDURE

### SHAREPOINT 2007

1. Log in using SharePoint administrator account to your SharePoint front-end server.
2. Go to Control Panel and double-click **Add or Remove Programs**.
3. Select product entry and click **Remove** button.
4. Click **Yes** to approve the removal of the component.
5. Once the product was un-installed, close the **Add or Remove Programs** screen.

### SHAREPOINT 2010/2013

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

## ADMINISTRATION GUIDE

This section describes all administration activities related to KWizCom File Controller feature, including: product activation, localization and configuration and customization.

### PRODUCT ACTIVATION

KWizCom products are available for evaluation prior to purchase.


This way you can try our products and verify that they indeed meet your needs. Each evaluation version contains all features of the component's production version. The only difference between the versions is that the evaluation version is time-limited and will operate for a period of one month.

Once you decide to purchase a KWizCom product you will need to **order** and then to **activate** the product. The steps that need to be taken next are listed below.

#### SharePoint 2007

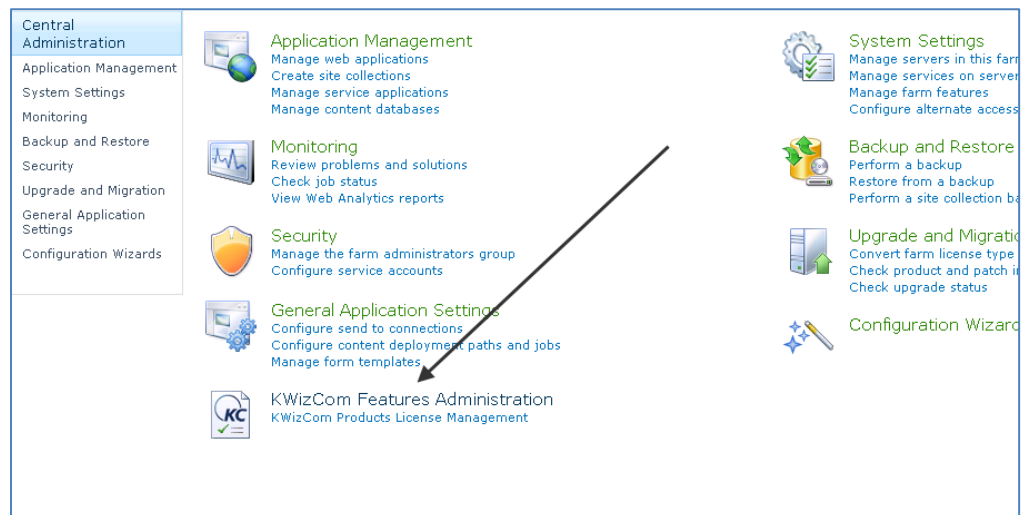
1. Order the product on the KWizCom website – [www.KWizCom.com](http://www.KWizCom.com), or contact our sales team at [sales@kwizcom.com](mailto:sales@kwizcom.com).
2. After the order was made, activate your installed evaluation version through the Product Activation Request page on KWizCom's web site: <http://www.kwizcom.com/ProductReg>. You will have to copy your *Product Code* (you will see the product code on the "About" product page):



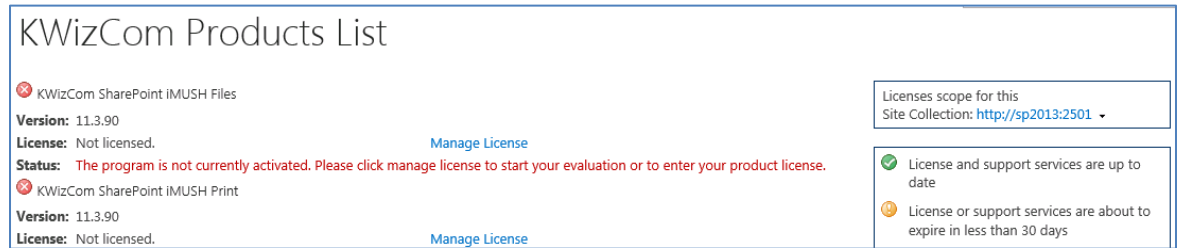
3. Get the product activation key – this key will be sent to you by email once your order is processed.
4. Activate your installed evaluation version -  
click **Start -> All Programs -> KWizCom -> [product name] ->  Activate [product]**

### SharePoint 2010/2013/2016

1. Order the product on the KWizCom website – [www.KWizCom.com](http://www.KWizCom.com), or contact our sales team at [sales@kwizcom.com](mailto:sales@kwizcom.com).
2. After the order was made, you can activate your installed evaluation version. Activation is done by the following steps:
  - a. Open SharePoint Central Admin. On the main “Central Administration” page, you will see the “KWizCom Features Administration” icon:



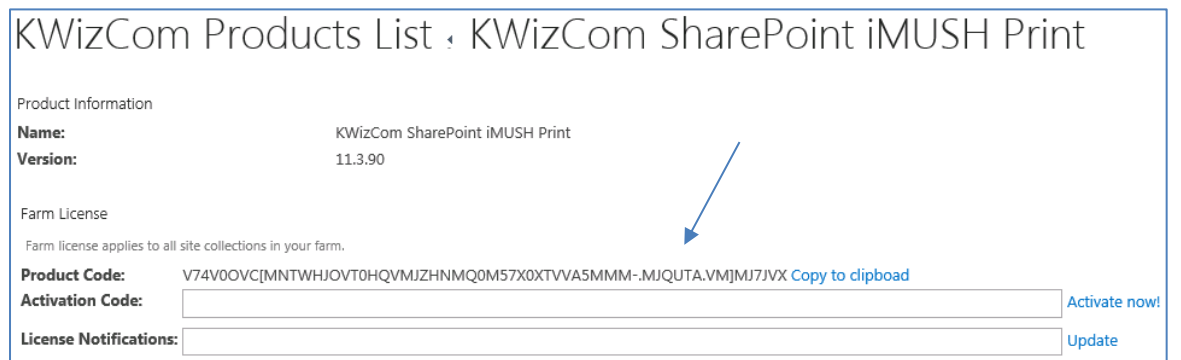
- b. Click the KWizCom Features Administration icon. You will be redirected to a page that allows you to manage all your installed KWizCom products’ licenses:



- c. Click the “Manage License” link next to the product that you wish to activate. You will be redirected to that product’s license management page:



- d. Click on the “Request product code and start your evaluation now” link, A product code will be generated and displayed as in the following screenshot:



- e. Copy the product code.
- f. Browse the *Product Activation Request* page on KWizCom’s web site: <http://www.kwizcom.com/support/product-activation/>.

### Product Activation Request

In order to deactivate a product please [click here](#).

This Product Activation Form is used to get your product activation key after you have purchased the product.

Please fill out the following form. Once we get your product activation request, a product activation key will be sent to you by email, along with the activation process description.

\*Customer Name:

\*E-mail address:

\*Share-It Order/Invoice Number:

\*Product Code:

\*License Type:

Copy your *Product Code* into the “Product Code” field, and after you fill-out all other form fields, click “Send Activation Request button.

- g. Once your order is confirmed, you will receive the Activation Code for your product by email.
- h. Copy the activation code into the “Activation Code” field in the product’s license management page and click “Activate now!” link.

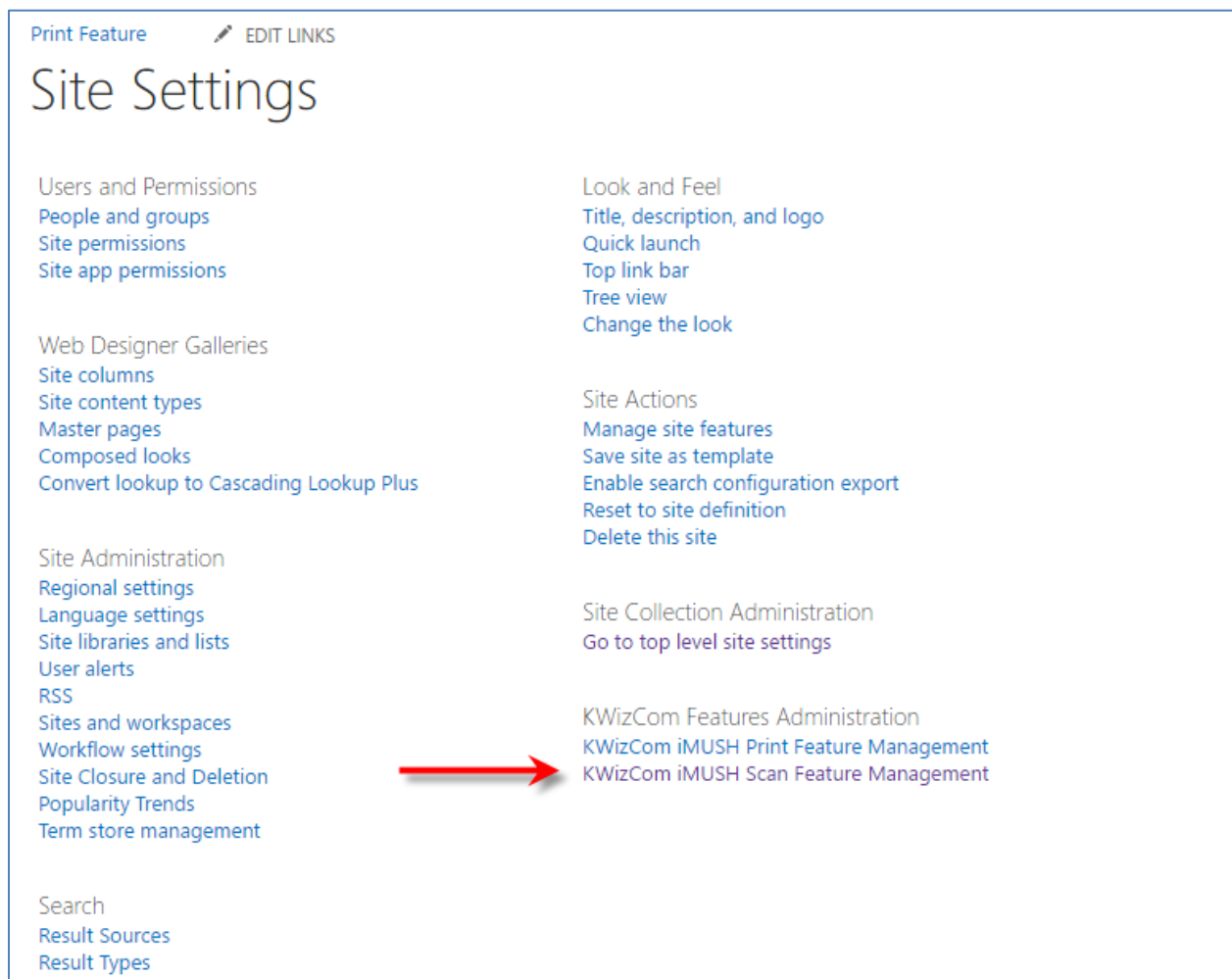
**That’s it! Your product is now fully activated.**

## CONFIGURING GENERAL SCANNING SETTINGS


### GENERAL

As an administrator, you can configure various scanning settings in a site or in a list/library level. By default, 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 various configuration categories. A red arrow points to the 'KWizCom iMUSH Scan Feature Management' link under the 'KWizCom Features Administration' section.

- 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
- 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**
- Search
  - Result Sources
  - Result Types

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 the scanner window (showing scanning options) to be displayed whenever a user scans a document.<br><br>By default this property is unchecked to enable faster scan operation. |
| Allow users to perform multi-document scan | To add a new mobile page, fill its name in the textbox and click the 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. |
|----------------------------|---|

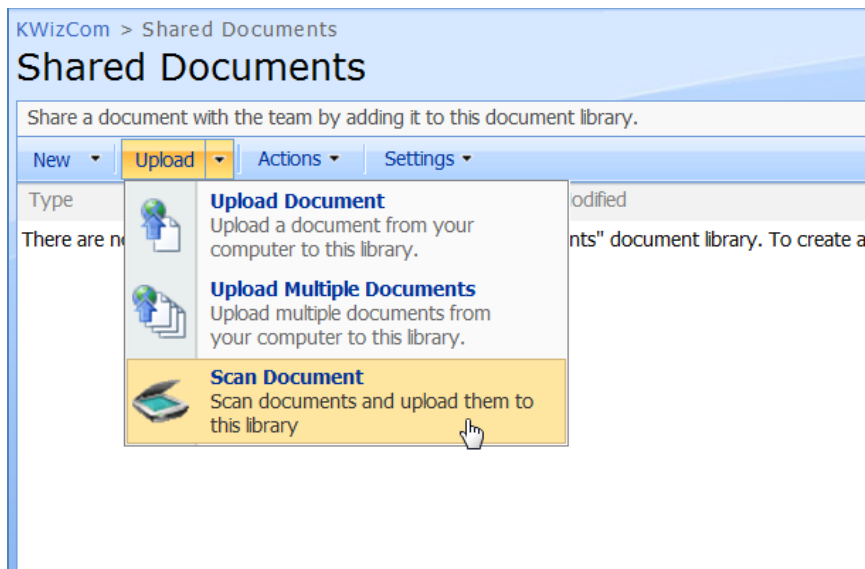
---

## SCANNING FILES

Well..this is the easy part.

### In SharePoint 2007

In order to scan and upload a file/s to a document library, simply click the “Scan Document” menu, below the “Upload” menu:



If you want to attach a scanned file to a list item, simply click the “Scan Attachment” menu in the list-item’s View page:

KWizCom > Tasks > Approve TTK milestone

## Tasks: Approve TTK milestone

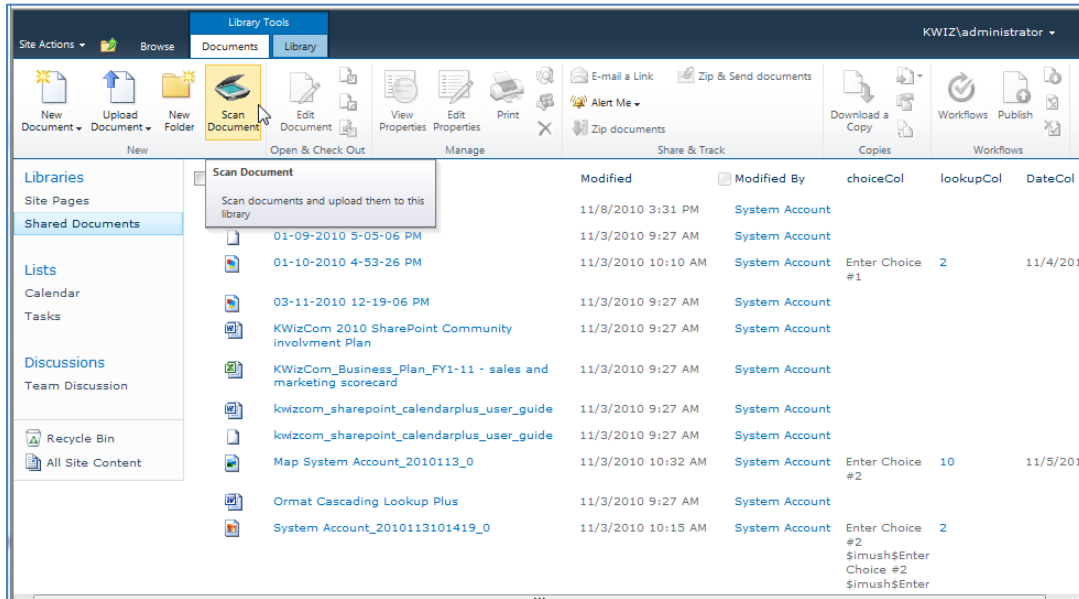
|  |  |  |  |  |

|                    |                       |
|--------------------|-----------------------|
| <b>Title</b>       | Approve TTK milestone |
| <b>Priority</b>    | (2) Normal            |
| <b>Status</b>      | Not Started           |
| <b>% Complete</b>  |                       |
| <b>Assigned To</b> |                       |
| <b>Description</b> |                       |
| <b>Start Date</b>  | 4/19/2010             |
| <b>Due Date</b>    | 4/21/2010             |

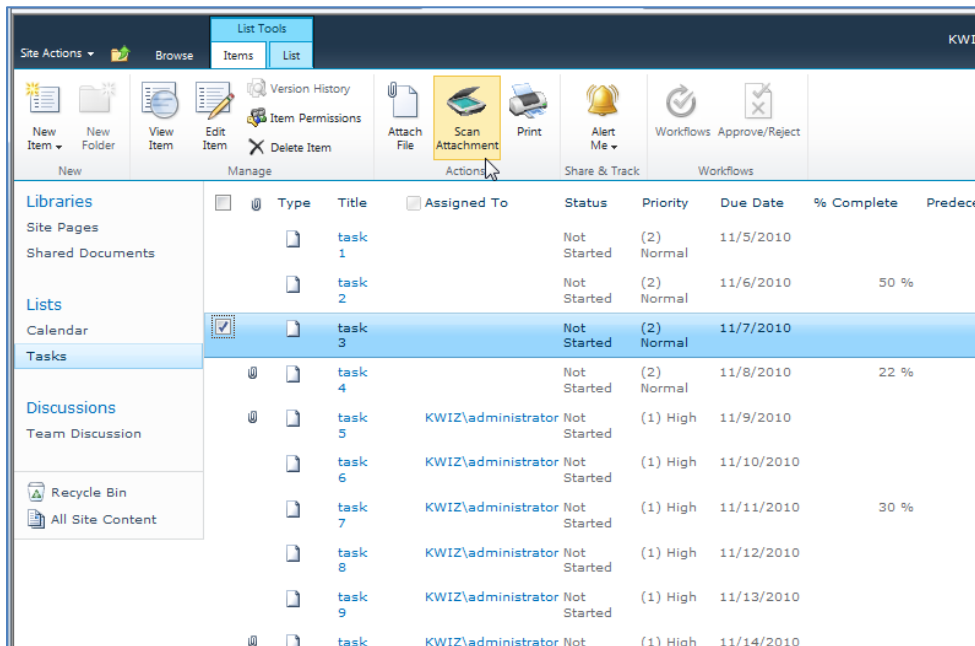
Created at 4/19/2010 10:46 AM by System Account  
Last modified at 4/19/2010 10:46 AM by System Account

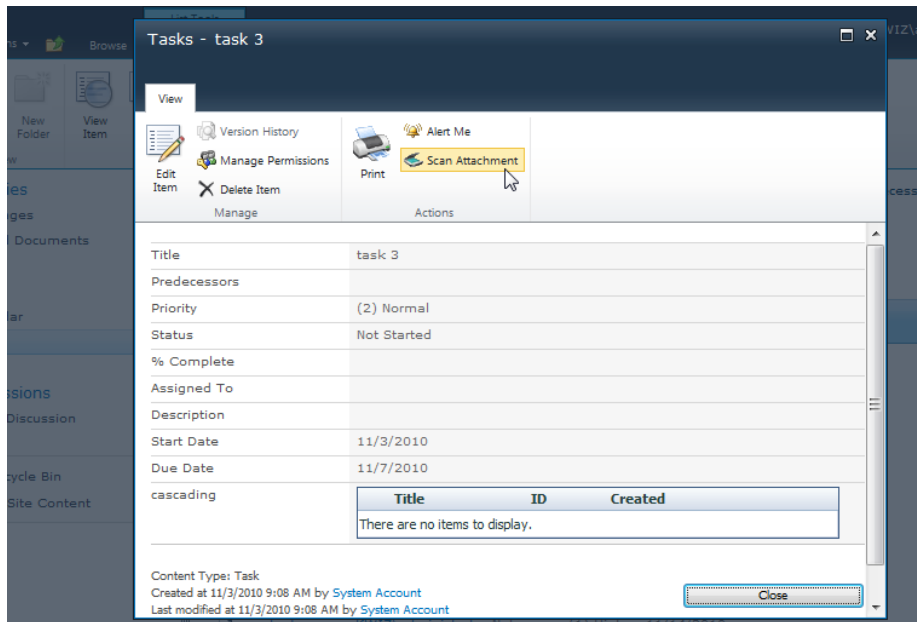
**In SharePoint 2010/2013/2016**

In SharePoint 2010/2013/2016 you have the Scan menu available in the ribbon:

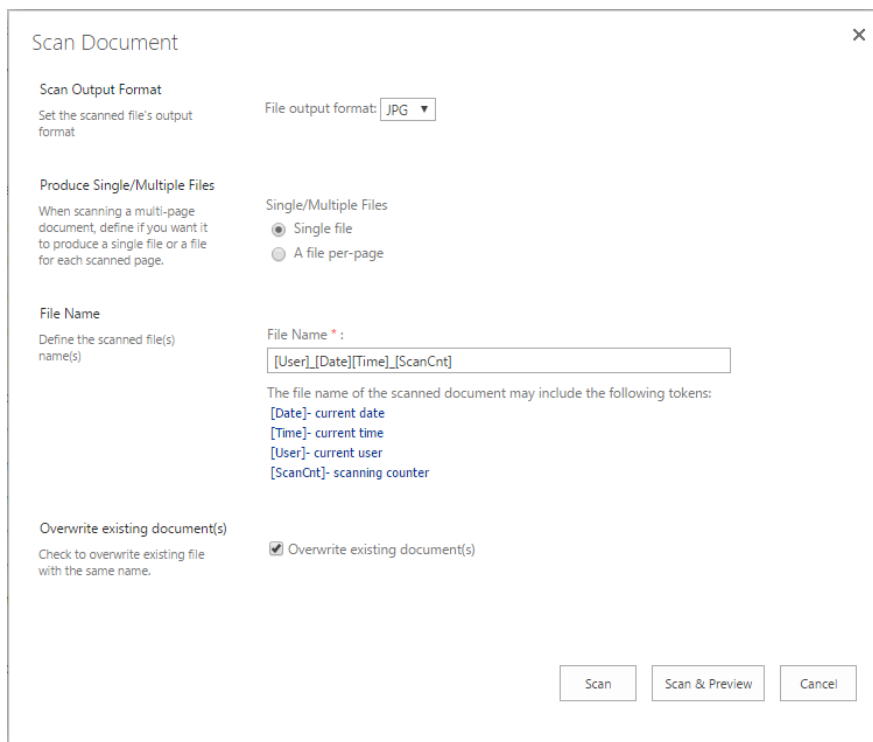


And same when you view/edit a list item – Scan menus appear in the view pages and in the item’s edit/view pages:





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



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

User can then choose to click between “Scan” to scan and upload the scanned file or “Scan & Preview” to open the Scan client that allows the user to preview the scanned file before uploading it to SharePoint.

## 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);}});'/>
```

## FAQ

### WHAT IS “iMUSH”?

iMUSH – Information Management Utilities for SharePoint.

iMUSH is a package of utilities, mostly used by offices working mainly with documents. It includes the following utilities: Scan, Print, File and Report.

Each one of the utilities is licensed and sold separately. Customers ordering the complete iMUSH bundle benefit from KWizCom’s bundle discounts.

### WHAT DOES iMUSH-SCAN DO?

iMUSH-Scan enables users to scan, tag and store the scanned documents in SharePoint, in a single click.

This includes both single document and multi-document scanning.

### DOES iMUSH REQUIRE MS OFFICE INSTALLATION ON THE CLIENT/SERVER?

No. iMUSH-Scan doesn’t require any MS Office installation.

### CAN I USE iMUSH WITH BROWSERS OTHER THAN MICROSOFT INTERNET EXPLORER?

Yes!

Since iMUSH-Scan uses Java to interface with the local scanner, you can use iMUSH-Scan with additional browsers such as Firefox, Google Chrome and Safari.

You can also use iMUSH-Scan with non-windows client operating systems (as long as they are supported by SharePoint).

### WITH WHICH SHAREPOINT VERSIONS CAN I USE THIS FEATURE?

KWizCom’s iMUSH printing feature works in SharePoint 2007/WSS 3.0 and SharePoint 2010/2013/2016 server/foundation.