



Documentation for Invoice capture

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Invoice capture

Invoice Capture is a web application to manage invoices (PDF documents) in OpenKM. It helps to sent and received invoices related to a company and, eventually, catalog automatically.

License



Invoice capture is licensed under the terms of the [EULA - OpenKM End User License Agreement](#) as published by OpenKM Knowledge Management System S.L.

This program is distributed WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the [EULA - OpenKM End User License Agreement](#) for more details.

Invoice Capture compatibility

Application version	OpenKM Compatibility		Status
	Professional	Community	
Invoice capture 3	Version 8.1.5 and upper	Not compatible	Active
Invoice capture 2	Version 7.1.18 and upper	Not compatible	Deprecated
Invoice capture 1	Version 7.1.13 to 7.1.17	Not compatible	Deprecated

Invoice capture 3

Invoice Capture compatibility

Application version	OpenKM Compatibility		Status
	Professional	Community	
3.0	Version 8.1.5 and upper	Not compatible	Active

Requirements 3.x



Invoice Capture is distributed as a war file.

- Java version 11
- Standalone Tomcat or standard OpenKM within Tomcat
- OpenKM administration access to:
 - Automation
 - Database query
 - Languages
 - Metadata
 - Be able to create folders (Import node)
- Configure the **invoice-capture.properties** file to get working with your OpenKM.

Installation 3.x

Steps to install and configure the *Invoice Capture* application in OpenKM v8.1:



In case you want to install Invoice Capture on a different server than OpenKM, you need to create the database:

```
CREATE USER 'invoice'@'%' IDENTIFIED BY 'openkm';
CREATE DATABASE invoice DEFAULT CHARACTER SET utf8 DEFAULT COLLATE utf8_bin;
GRANT ALL ON invoice.* TO 'invoice'@'%' WITH GRANT OPTION;
```

Otherwise, you have to use the same database used for OpenKM.

- Stop Tomcat
- Download the application from OpenKM download center
- Place the **invoice.war** file into \$TOMCAT_HOME/webapps
- Place the **invoice-plugins.jar** file into \$TOMCAT_HOME/plugins
- This application needs to share the database with OpenKM, so you don't need to create a new one
- Create the configuration file **\$TOMCAT_HOME/invoice-capture.properties** (this is a sample configuration that need to be adapted to the target environment)

```
# Database
spring.datasource.driver-class-name=com.mysql.cj.jdbc.Driver
spring.datasource.url=jdbc:mysql://localhost:3306/okmdb?useUnicode=true&characterEncoding=utf8
spring.datasource.username=openkm
spring.datasource.password=openkm
spring.jpa.hibernate.ddl-auto=create
spring.jpa.properties.hibernate.dialect=org.hibernate.dialect.MySQL57InnoDBDialect

# OpenKM
openkm.url=http://localhost:8080/openkm
openkm.url.preview=http://server.ip:8080/openkm

# OpenKM admin user
admin.user=invoice
admin.password=s3cr3t0

# Preview
preview.download.url=http://server.ip:8080/invoice/download

# OpenKM folder
standard.import.node=bb381ac2-f3f6-42b4-8df6-fbd0e87054ce
advanced.import.node=76d1c3c7-d085-47ec-a153-c146e63ee9d9
root.destination.folder.path=/okm:root/invoice

# Available languages
languages=en-GB,es-ES
default.language=es-ES

# Logos
app.logo=http://server.ip:8080/openkm/logo/login
app.logo.login=http://server.ip:8080/openkm/logo/login

# Filter companies list in the search view based in documents of the companies previously
```

```
filter.companies.by.user.upload.documents=false
```

The **openkm.url** configuration property family is also important because Invoice Capture will use this user to interact with your OpenKM instance. So, configure a user with enough permissions. This user should already exist in OpenKM.

The **standard.import.node** and **advanced.import.node** properties need to be valid UUIDs of existing folders on your OpenKM. These folders are used to upload the invoice documents.

The folder defined in **root.destination.folder** is created automatically in the root of your OpenKM's Taxonomy on the first invoice cataloged.

- Start Tomcat
- Edit the configuration file `$TOMCAT_HOME/invoice-capture.properties` and modify the value of this property to **"update"**, this property should look like this:

```
spring.jpa.hibernate.ddl-auto=update
```

- Log into OpenKM and follow the user guide documentation of Invoice Capture.



In case of problems, please check the `$TOMCAT_HOME/logs/invoice-capture.log`

- Once the application is configured you can log to <http://server.ip:8080/invoice> with the default administrator:
 - **User:** admin
 - **Password:** admin
- Remember to change this default password!!

User guide 3.x

Invoice Capture is a web application to manage invoices - usually PDF documents - in OpenKM. It helps in sending and reception of invoices related to a company and eventually, catalog automatically.



Currently are available English and Spanish translations, but can be easily translated to other languages.

Metadata used by catalog

Application use metadata in combination with Automation to automatically catalog invoices.

Can create different types of documents - invoices, delivery notes, etc - by creating different groups of metadata that are dynamically loaded in the entry data form.

Some of the metadata fields by default are:

- Company Tax number (required)
- Company name (required)
- Company internal code (not required)
- Invoice number (not required)
- Invoice status (possible values: sent, received, etc)
- Date (required)
- User
- VAT
- Total cost

The invoices are cataloged into OpenKM by default with the following folder structure: `/okm:root/{root.destination.folder}/{tax number}/{year}/{month}` where **{tax number}**, **{year}** and **{month}** corresponds with metadata field values.

The *root.destination.folder* is set in the file named *invoice-capture.properties*, here you set the name of the folder directly.

Configuration preliminaries

The roles used by the application are :

- **ROLE_ADMIN**
- **ROLE_STANDARD**
- **ROLE_ADVANCED**

Create missing roles

Go to the OpenKM Administration > Authentication > Roles

- **ROLE_STANDARD**
- **ROLE_ADVANCED**



Use a user with ROLE_ADMIN to:

- Create companies.
- Create users.
- Assign users to the companies

A company can have multiple users, but a user only belongs to one company.

Create automation

Go to the OpenKM Administration > Automation and register automation for cataloging documents.

You have to create 5 automation in post mode:

Automation create

Go to OpenKM administration, select the option automation and new rule, fill the name "**Invoice catalog standard add**", select **metadata group**", and check the box "Active".

Go to OpenKM administration, select the option automation and new rule, fill with name "**Invoice catalog advanced add**", select **metadata group**" and check the box "Active".

Go to OpenKM administration, select the option automation and new rule, fill the name "**Invoice catalog standard set**", select **metadata group**", check the box "Active" and select post.

Go to OpenKM administration, select the option automation and new rule, fill with name "**Invoice catalog advanced set**", select **metadata group**" and check the box "Active".

Go to OpenKM administration, select the option automation and new rule, fill with the name "**Invoice upload**", select the even **create**" and check the box "Active".



In the file **invoice-capture.properties** (found in Tomcat's folder) you define the uuids for both folders created in OpenKM:

standard.import.node = bb381ac2-f3f6-42b4-8df6-fbd0e87054ce

advanced.import.node = 76d1c3c7-d085-47ec-a153-c146e63ee9d9



The value of the UUID of the nodes depend on your OpenKM instance.

Register metadata

Go to the OpenKM **Administration** > **Metadata** and register the below metadata definition

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE property-groups PUBLIC "-//OpenKM//DTD Property Groups 3.9//EN"
"http://www.openkm.com/dtd/property-groups-3.9.dtd">
<property-groups>

<property-group label="Document type" name="okg:invoice_doc_type">
  <select label="Type" name="okp:invoice_doc_type.type" type="simple" optionsQuery=
</property-group>

</property-groups>
```

Standard mode



User works in **standard mode** when is a member of **ROLE_STANDARD**.

A user with this role is assigned TO one company, and he is able to catalog invoices just for this company.

In the Standard mode, users are able to **catalog invoices** and **search for invoices** by its company assigned, document type, year and month.

Catalog invoices with metadata

1. Click on **STEP 1** option located at the **top left menu**
2. Add invoices from your local disk by clicking on **Add files** button, and upload them by clicking on *the Upload* button for each one (or clicking on *the Upload all* button).
3. Once you have uploaded the invoices, click on *the STEP 2* option at the **top left menu**.
4. Set invoice metadata for each uploaded invoice in the previous step. To confirm the changes click on the **Add** button.

This button will be enabled when the form is fully completed.



In the metadata form, the field *Company name* is the company assigned to this user.

Search for invoices

1. Click on the **SEARCH** option on the **top-right menu**.
2. Fill in the year and month fields then click on the **Search** button.
3. A list of invoices filtered by the companies of the user, document type, year and month will be shown.



A row in a table with fields *Type*, *Name*, *Size*, *Author*, *Date*, *Tax number*, *VAT*, and *Total* is shown for each invoice.

In each row, you can see a **Download** button to download the invoice.

Advanced mode



User works in advanced **mode** when is **member of ROLE_ADVANCED**.

A user with this role can catalog invoices for the company assigned to the user.

In the advanced mode, users are able to **catalog invoices** and **search for invoices** by companies (providers), document type, year and month.

Catalog invoices with metadata

Same as explained above for Standard mode.



In the metadata form, the field *Company name* is a **list** of companies **created by an admin user**.

Search for invoices

Same as explained above for Standard mode.

Admin mode



User works in **admin mode** when is **member of ROLE_ADMIN**.

By default, the app contains an admin user named *admin*.

In the Admin mode users are able to **catalog invoices**, **manage companies**, **manage users**, and **search for invoices** by year and month.

Companies management

1. Click on the **COMPANY** option on the **top-right menu**.
2. Fill in the required fields: **Tax number** and **Name**, and **optionally Internal code** to create a new company and finally click on **Add** button.
3. In the list of companies you can edit or delete companies, by clicking on the **Edit** button or **Delete** button respectively.

Users management

1. Click on the **USERS** option on the **top-right menu**.
2. Fill in the required fields: **Id**, **Password**, and **Name**, assign a **role**, and **optionally** assign a **company** to create a new user and finally click on **Add** button.
3. In the list of users you can edit or delete users, by clicking on the **Edit** button or **Delete** button respectively.

Changelog 3.x

Invoice Capture v2

v3.0

- Release: 2023-10-03
 - Java 11 required
 - Tomcat 9.x required
-

Migration guide 3.x

- [Migration from v2.11 to v3.0](#)

Migration from v2.11 to v3.0

- Update **Java version 1.8 to version 11**
- Update **tomcat 8.x to tomcat 9.x** (keep the **invoice.properties** configuration file in the %TOMCAT_HOME)
- Stop Tomcat and replace the WAR
- Replace the **invoice.war** archive at **\$TOMCAT_HOME/webapps**
- Start Tomcat again

Invoice capture 2

Invoice Capture compatibility

Application version	OpenKM Compatibility		Status
	Professional	Community	
2.11	Version 7.1.40 and upper	Not compatible	Deprecated
2.10	Version 7.1.34 to 7.1.39	Not compatible	Deprecated
2.9	Version 7.1.34	Not compatible	Deprecated
2.8	Version 7.1.33	Not compatible	Deprecated
2.7	Version 7.1.33	Not compatible	Deprecated
2.6	Version 7.1.28 to 7.1.32	Not compatible	Deprecated
2.5	Version 7.1.27	Not compatible	Deprecated
2.4	Version 7.1.24 to 7.1.26	Not compatible	Deprecated
2.3	Version 7.1.23	Not compatible	Deprecated
2.2	Version 7.1.22	Not compatible	Deprecated
2.1	Version 7.1.21	Not compatible	Deprecated
2.0	Version 7.1.18 to 7.1.20	Not compatible	Deprecated

Requirements 2.x



Invoice Capture is distributed as a war file.

- Java version 1.8
- Standalone Tomcat or standard OpenKM within Tomcat
- OpenKM administration access to:
 - Automation
 - Database query
 - Languages
 - Metadata
 - Be able to create folders (Import node)
- Configure the **invoice-capture.properties** file to get working with your OpenKM.

Installation 2.x

Steps to install and configure the *Invoice Capture* application in OpenKM v7.1:



In case you want to install Invoice Capture in a different server than OpenKM, you need to create the database:

```
CREATE USER 'invoice'@'%' IDENTIFIED BY 'openkm';
CREATE DATABASE invoice DEFAULT CHARACTER SET utf8 DEFAULT COLLATE utf8_bin;
GRANT ALL ON invoice.* TO 'invoice'@'%' WITH GRANT OPTION;
```

Otherwise you have to use the same database used for OpenKM.

- Stop Tomcat
- Download the application from OpenKM download center
- Place the **invoice.war** file into \$TOMCAT_HOME/webapps
- Place the **invoice-plugins.jar** file into \$TOMCAT_HOME/plugins
- This application needs to share the database with OpenKM, so you don't need to create a new one
- Create the configuration file **\$TOMCAT_HOME/invoice-capture.properties** (this is a sample configuration which needs to be adapted to the target environment)

```
# Database
spring.datasource.driver-class-name=com.mysql.cj.jdbc.Driver
spring.datasource.url=jdbc:mysql://localhost:3306/okmdb?useUnicode=true&characterEncoding=utf8
spring.datasource.username=openkm
spring.datasource.password=openkm
spring.jpa.hibernate.ddl-auto=create
spring.jpa.properties.hibernate.dialect=org.hibernate.dialect.MySQL57InnoDBDialect

# OpenKM
openkm.url=http://localhost:8080/openkm
openkm.url.preview=http://server.ip:8080/openkm

# OpenKM admin user
admin.user=invoice
admin.password=s3cr3t0

# Preview
preview.download.url=http://server.ip:8080/invoice/download

# OpenKM folder
standard.import.node=bb381ac2-f3f6-42b4-8df6-fbd0e87054ce
advanced.import.node=76d1c3c7-d085-47ec-a153-c146e63ee9d9
root.destination.folder.path=/okm:root/invoice

# Available languages
languages=en-GB,es-ES
default.language=es-ES

# Logos
app.logo=http://server.ip:8080/openkm/logo/login
app.logo.login=http://server.ip:8080/openkm/logo/login

# Filter companies list in the search view based in documents of the companies previously
```

```
filter.companies.by.user.upload.documents=false
```

The **openkm.url** configuration property family is also important because Invoice Capture will use this user to interact with your OpenKM instance. So, configure an user with enough permissions. This user should already exists in OpenKM.

The **standard.import.node** and **advanced.import.node** properties need to be valid uuids of existing folders on your OpenKM. These folders are used to upload the invoice documents.

The folder defined in **root.destination.folder** is created automatically in the root of your OpenKM's Taxonomy on the first invoice catalogued.

- Start Tomcat
- Edit the configuration file **\$TOMCAT_HOME/invoice-capture.properties** and modify the value of this property to **"update"**, this property should looks like this:

```
spring.jpa.hibernate.ddl-auto=update
```

- Log into OpenKM and follow the user guide documentation of Invoice Capture.



In case of problems, please check the [\\$TOMCAT_HOME/logs/invoice-capture.log](#)

- Once the application is configured you can log to <http://server.ip:8080/invoice> with the default administrator:
 - **User:** admin
 - **Password:** admin
- Remember to change this default password!!

User guide 2.x

Invoice Capture is a web application to manage invoices - usually PDF documents - in OpenKM. It helps in sending and reception of invoices related to a company and eventually, catalog automatically.



Currently are available English and Spanish translations, but can be easily translated to other languages.

Metadata used by catalog

Application use metadata in combination with Automation to automatically catalog invoices.

Can create different types of documents - invoices, delivery notes, etc - by creating different groups of metadata that are dynamically loaded in the entry data form.

Some of the metadata fields by default are:

- Company Tax number (required)
- Company name (required)
- Company internal code (not required)
- Invoice number (not required)
- Invoice status (possible values: sent, received, etc)
- Date (required)
- User
- VAT
- Total cost

The invoices are cataloged into OpenKM by default with the following folder structure: `/okm:root/{root.destination.folder}/{tax number}/{year}/{month}` where **{tax number}**, **{year}** and **{month}** corresponds with metadata field values.

The *root.destination.folder* is set in the file named *invoice-capture.properties*, here you set the name of the folder directly.

Configuration preliminaries

The roles used by the application are :

- **ROLE_ADMIN**
- **ROLE_STANDARD**
- **ROLE_ADVANCED**

Create missing roles

Go to the OpenKM Administration > Authentication > Roles

- **ROLE_STANDARD**
- **ROLE_ADVANCED**



Use a user with ROLE_ADMIN to:

- Create companies.
- Create users.
- Assign users to the companies

A company can have multiple users, but a user only belongs to one company.

Create automation

Go to the OpenKM Administration > Automation and register automation for cataloging documents.

You have to create 5 automation in post mode:

Automation create

Go to OpenKM administration, select the option automation and new rule, fill the name "**Invoice catalog standard add**", select **metadata group**", and check the box "Active".

Go to OpenKM administration, select the option automation and new rule, fill with name "**Invoice catalog advanced add**", select **metadata group**" and check the box "Active".

Go to OpenKM administration, select the option automation and new rule, fill the name "**Invoice catalog standard set**", select **metadata group**", check the box "Active" and select post.

Go to OpenKM administration, select the option automation and new rule, fill with name "**Invoice catalog advanced set**", select **metadata group**" and check the box "Active".

Go to OpenKM administration, select the option automation and new rule, fill with the name "**Invoice upload**", select the even **create**" and check the box "Active".



In the file **invoice-capture.properties** (found in Tomcat's folder) you define the uuids for both folders created in OpenKM:

standard.import.node = bb381ac2-f3f6-42b4-8df6-fbd0e87054ce

advanced.import.node = 76d1c3c7-d085-47ec-a153-c146e63ee9d9



The value of the UUID of the nodes depend on your OpenKM instance.

Register metadata

Go to the **OpenKM Administration** > **Metadata** and register the below metadata definition

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE property-groups PUBLIC "-//OpenKM//DTD Property Groups 3.9//EN"
"http://www.openkm.com/dtd/property-groups-3.9.dtd">
<property-groups>

<property-group label="Document type" name="okg:invoice_doc_type">
  <select label="Type" name="okp:invoice_doc_type.type" type="simple" optionsQuery=
</property-group>

</property-groups>
```

Standard mode



User works in **standard mode** when is a member of **ROLE_STANDARD**.

A user with this role is assigned TO one company, and he is able to catalog invoices just for this company.

In the Standard mode, users are able to **catalog invoices** and **search for invoices** by its company assigned, document type, year and month.

Catalog invoices with metadata

1. Click on **STEP 1** option located at the **top left menu**
2. Add invoices from your local disk by clicking on **Add files** button, and upload them by clicking on *the Upload* button for each one (or clicking on *the Upload all* button).
3. Once you have uploaded the invoices, click on *the STEP 2* option at the **top left menu**.
4. Set invoice metadata for each uploaded invoice in the previous step. To confirm the changes click on the **Add** button.

This button will be enabled when the form is fully completed.



In the metadata form, the field *Company name* is the company assigned to this user.

Search for invoices

1. Click on the **SEARCH** option on the **top-right menu**.
2. Fill in the year and month fields then click on the **Search** button.
3. A list of invoices filtered by the companies of the user, document type, year and month will be shown.



A row in a table with fields *Type*, *Name*, *Size*, *Author*, *Date*, *Tax number*, *VAT*, and *Total* is shown for each invoice.

In each row, you can see a **Download** button to download the invoice.

Advanced mode



User works in advanced **mode** when is **member of ROLE_ADVANCED**.

A user with this role can catalog invoices for the company assigned to the user.

In the advanced mode, users are able to **catalog invoices** and **search for invoices** by companies (providers), document type, year and month.

Catalog invoices with metadata

Same as explained above for Standard mode.



In the metadata form, the field *Company name* is a **list** of companies **created by an admin user**.

Search for invoices

Same as explained above for Standard mode.

Admin mode



User works in **admin mode** when is **member of ROLE_ADMIN**.

By default, the app contains an admin user named *admin*.

In the Admin mode users are able to **catalog invoices**, **manage companies**, **manage users**, and **search for invoices** by year and month.

Companies management

1. Click on the **COMPANY** option on the **top-right menu**.
2. Fill in the required fields: **Tax number** and **Name**, and **optionally Internal code** to create a new company and finally click on **Add** button.
3. In the list of companies you can edit or delete companies, by clicking on the **Edit** button or **Delete** button respectively.

Users management

1. Click on the **USERS** option on the **top-right menu**.
2. Fill in the required fields: **Id**, **Password**, and **Name**, assign a **role**, and **optionally** assign a **company** to create a new user and finally click on **Add** button.
3. In the list of users you can edit or delete users, by clicking on the **Edit** button or **Delete** button respectively.

Changelog 2.x

Invoice Capture v2

v2.11

- Release: 2023-08-03
- Compatibility with OpenKM v7.1.40
- Improvement the user now can delete the document from the user interface.
- Fixed issue with users members of ROLE_ADMIN must get access to all the companies list.

v2.10

- Release: 2022-10-07
- Compatibility with OpenKM v7.1.34
- Added configuration parameter **filter.companies.by.user.upload.documents** in the invoice-capture.properties file that force to do searches only for the companies that previously added documents.

v2.9

- Release: 2022-09-15
- Compatibility with OpenKM v7.1.34
- Updated library dependency for SDK for JAVA to version 3.24

v2.8

- Release: 2022-08-17
- Compatibility with OpenKM v7.1.33
- New REST method to get user
- Added optional field email in the user management
- Fixed REST issue with infinite loop getting user list (because the relation between user and companies)

v2.7

- Release: 2022-08-3
- Compatibility with OpenKM v7.1.33
- The configuration parameter **root.destination.folder** has been renamed to **root.destination.folder.path**
- The value of the **root.destination.folder.path** must contains **full OpenKM path** (take as a sample /okm:root/invoice-module)
- Improvement: multitenancy supported
 - Invoice REST API created.

- Plugins use invoice REST API for queries.
- Added plugin named "**OptionDocumentTypeList**"
- Updated metadata definition, now the value of field named "**okp:invoice_doc_type.type**" use the plugin with className "**com.openkm.plugin.form.values.OptionDocumentTypeList**"
- Deprecated: Plugin named "**CompanyRestPlugin**" has been removed.
- Bug solved: related to performance.
- Remarkable performance improved.
- Now you can put the field "Total" in a negative number.
- Bug solved: does not allow creating/updating users with role ROLE_ADMIN.
- Bug solved: does not allow editing/creating users when they have the role of advanced.
- A new "Sharing" check box was added in the user management screen (user creation and editing) to indicate if the user has this functionality to share documents, and it would apply to both roles, ROLE_ADVANCED AND ROLE_STANDARD, so also just in case you could be interested in sharing documents between standard users and having greater flexibility, by default it would be false for all users.

v2.6

- Release: 2021-11-10
- Compatibility with OpenKM v7.1.28
- Bug: Error creating new companies
- Improvement: now also you can catalog invoices from OpenKM when assigning the metadata
- Improvement: now in the metadata you can use the property Tax number as Suggestbox, so you can search companies from OpenKM using this field.

v2.5

- Release: 2021-09-23
- Compatibility with OpenKM v7.1.27
- Bug: It is not taking the default language established in the application properties
- Some other minor bugs were fixed.
- Improvement: Now the performance in the search of invoices has been considerably improved
- Improvement: Sort alphabetically the listing of companies in the cataloging form
- Improvement: logs have been improved

v2.4

- Release: 2021-07-15
- Compatibility with OpenKM v7.1.24

v2.3

- Release: 2021-06-17
- Fix relative logo issue

v2.2

- Release: 2021-05-05
- Now we can search by document type (Invoice, Delivery note, etc)
- Multiple bugs fixed

v2.1

- Release: 2021-04-08
- Code improvements
- UI improvements
- New functionality for ROLE_ADVANCED to catalog invoices from any vendor
- Multiple bugs fixed
- Bug: Notifications are not sent to the users when the catalog folder is subscribed
- Bug: On search functionality just search by OR
- Bug: a provider can see the invoices to be cataloged from the rest of the providers

v2.0

- Release: 2021-01-11
 - Bugs resolved
 - The old version functionality was removed and cleaned.
-

Migration guide 2.x

- [Migration from v2.10 to v2.11](#)
- [Migration from v2.9 to v2.10](#)
- [Migration from v2.8 to v2.9](#)
- [Migration from v2.7 to v2.8](#)
- [Migration from v2.6 to v2.7](#)

Migration from v2.10 to v2.11

- Execute the next SQL Script at Administration > Tools > Database Query

```
INSERT INTO OKM_TRANSLATION (TR_MODULE, TR_KEY, TR_TEXT, TR_LANGUAGE) VALUES ('invoice',  
INSERT INTO OKM_TRANSLATION (TR_MODULE, TR_KEY, TR_TEXT, TR_LANGUAGE) VALUES ('invoice'
```

- Stop Tomcat and replace the WAR
- Replace the *invoice.war* archive at ***\$TOMCAT_HOME/webapps***
- Start Tomcat again

Migration from v2.9 to v2.10

- Stop Tomcat and replace the WAR
- Replace the *invoice.war* archive at *\$TOMCAT_HOME/webapps*
- Replace the *invoice-plugins.jar* archive at *\$TOMCAT_HOME/plugins*
- Start Tomcat again

Migration from v2.8 to v2.9

- Stop Tomcat and replace the WAR
- Replace the *invoice.war* archive at *\$TOMCAT_HOME/webapps*
- Replace the *invoice-plugins.jar* archive at *\$TOMCAT_HOME/plugins*
- Start Tomcat again

Migration from v2.7 to v2.8

- Stop Tomcat and replace the WAR
- Replace the *invoice.war* archive at *\$TOMCAT_HOME/webapps*
- Replace the *invoice-plugins.jar* archive at *\$TOMCAT_HOME/plugins*
- Start Tomcat again

Migration from v2.6 to v2.7

- Go to OpenKM Administration > Utilities > Database query and execute (usually invoice URL is `http://localhost:8080/invoice`, if have another, update with yours):

```
insert into OKM_CONFIG (CFG_KEY, CFG_TYPE, CFG_VALUE) values ('invoice.url','str
```

- Edit the *invoice-capture.properties* file and rename this configuration property:
 - *root.destination.folder* to *root.destination.folder.path*
- Set the value of the mentioned property *root.destination.folder.path* with a valid OpenKM path, for example:
 - */okm:root/invoice-module*
- Stop Tomcat and replace the WAR
- Replace the *invoice.war* archive at *\$TOMCAT_HOME/webapps*
- Replace the *invoice-plugins.jar* archive at *\$TOMCAT_HOME/plugins*
- Start Tomcat again
- Update the metadata definition of the metadata group named "**okg:invoice_doc_type**":

```
<!-- TYPE DOCUMENT -->
<property-group label="Document type" name="okg:invoice_doc_type">
  <select label="Type" name="okp:invoice_doc_type.type" type="simple"
    className="com.openkm.plugin.form.values.OptionDocumentTypeList"/>
</property-group>
```

Invoice capture 1

Invoice Capture compatibility

Application version	OpenKM Compatibility		Status
	Professional	Community	
1.2	Version 7.1.16 to 7.1.17	Not compatible	Deprecated
1.1	Version 7.1.14 to 7.1.16	Not compatible	Deprecated
1.0	Version 7.1.13	Not compatible	Deprecated

Requirements 1.x



Invoice Capture is distributed as a war file.

- Java version 1.8
- Standalone Tomcat or standard OpenKM within Tomcat
- OpenKM administration access to:
 - Automation
 - Database query
 - Languages
 - Metadata
 - Be able to create folders (Import node)
- Configure the **invoice-capture.properties** file to get working with your OpenKM.

Installation 1.x

Steps to install and configure the *Invoice Capture* application in OpenKM v7.1:



In case you want to install Invoice Capture in a different server than OpenKM, you need to create the database:

```
CREATE USER 'invoice'@'%' IDENTIFIED BY 'openkm';
CREATE DATABASE invoice DEFAULT CHARACTER SET utf8 DEFAULT COLLATE utf8_bin;
GRANT ALL ON invoice.* TO 'invoice'@'%' WITH GRANT OPTION;
```

Otherwise you have to use the same database used for OpenKM.

- Stop Tomcat
- Download the application from OpenKM download center
- Place the **invoice.war** file into \$TOMCAT_HOME/webapps
- Place the **invoice-plugins.jar** file into \$TOMCAT_HOME/plugins
- This application needs to share the database with OpenKM, so you don't need to create a new one
- Create the configuration file **\$TOMCAT_HOME/invoice-capture.properties** (this is a sample configuration which needs to be adapted to the target environment)

```
# Database
spring.datasource.driver-class-name=com.mysql.cj.jdbc.Driver
spring.datasource.url=jdbc:mysql://localhost:3306/okmdb?useUnicode=true&characterEncoding=utf8
spring.datasource.username=openkm
spring.datasource.password=openkm
spring.jpa.hibernate.ddl-auto=create
spring.jpa.properties.hibernate.dialect=org.hibernate.dialect.MySQL57InnoDBDialect

# OpenKM
openkm.url=http://localhost:8080/openkm
openkm.url.preview=http://server.ip:8080/openkm

# OpenKM admin user
admin.user=invoice
admin.password=s3cr3t0

# Preview
preview.download.url=http://server.ip:8080/invoice/download

# OpenKM folder
standard.import.node=bb381ac2-f3f6-42b4-8df6-fbd0e87054ce
advanced.import.node=76d1c3c7-d085-47ec-a153-c146e63ee9d9
root.destination.folder.path=/okm:root/invoice

# Available languages
languages=en-GB,es-ES
default.language=es-ES

# Logos
app.logo=http://server.ip:8080/openkm/logo/login
app.logo.login=http://server.ip:8080/openkm/logo/login

# Filter companies list in the search view based in documents of the companies previously
```

```
filter.companies.by.user.upload.documents=false
```

The **openkm.url** configuration property family is also important because Invoice Capture will use this user to interact with your OpenKM instance. So, configure an user with enough permissions. This user should already exists in OpenKM.

The **standard.import.node** and **advanced.import.node** properties need to be valid uuids of existing folders on your OpenKM. These folders are used to upload the invoice documents.

The folder defined in **root.destination.folder** is created automatically in the root of your OpenKM's Taxonomy on the first invoice catalogued.

- Start Tomcat
- Edit the configuration file **\$TOMCAT_HOME/invoice-capture.properties** and modify the value of this property to **"update"**, this property should looks like this:

```
spring.jpa.hibernate.ddl-auto=update
```

- Log into OpenKM and follow the user guide documentation of Invoice Capture.



In case of problems, please check the [\\$TOMCAT_HOME/logs/invoice-capture.log](#)

- Once the application is configured you can log to <http://server.ip:8080/invoice> with the default administrator:
 - **User:** admin
 - **Password:** admin
- Remember to change this default password!!

User guide 1.x

Invoice Capture is a web application to manage invoices - usually PDF documents - in OpenKM. It helps in sending and reception of invoices related to a company and eventually, catalog automatically.



Currently are available English and Spanish translations, but can be easily translated to other languages.

Metadata used by catalog

Application use metadata in combination with Automation to automatically catalog invoices.

Can create different types of documents - invoices, delivery notes, etc - by creating different groups of metadata that are dynamically loaded in the entry data form.

Some of the metadata fields by default are:

- Company Tax number (required)
- Company name (required)
- Company internal code (not required)
- Invoice number (not required)
- Invoice status (possible values: sent, received, etc)
- Date (required)
- User
- VAT
- Total cost

The invoices are cataloged into OpenKM by default with the following folder structure: `/okm:root/{root.destination.folder}/{tax number}/{year}/{month}` where **{tax number}**, **{year}** and **{month}** corresponds with metadata field values.

The *root.destination.folder* is set in the file named *invoice-capture.properties*, here you set the name of the folder directly.

Configuration preliminaries

The roles used by the application are :

- **ROLE_ADMIN**
- **ROLE_STANDARD**
- **ROLE_ADVANCED**

Create missing roles

Go to the OpenKM Administration > Authentication > Roles

- **ROLE_STANDARD**
- **ROLE_ADVANCED**



Use a user with ROLE_ADMIN to:

- Create companies.
- Create users.
- Assign users to the companies

A company can have multiple users, but a user only belongs to one company.

Create automation

Go to the OpenKM Administration > Automation and register automation for cataloging documents.

You have to create 5 automation in post mode:

Automation create

Go to OpenKM administration, select the option automation and new rule, fill the name "**Invoice catalog standard add**", select **metadata group**", and check the box "Active".

Go to OpenKM administration, select the option automation and new rule, fill with name "**Invoice catalog advanced add**", select **metadata group**" and check the box "Active".

Go to OpenKM administration, select the option automation and new rule, fill the name "**Invoice catalog standard set**", select **metadata group**", check the box "Active" and select post.

Go to OpenKM administration, select the option automation and new rule, fill with name "**Invoice catalog advanced set**", select **metadata group**" and check the box "Active".

Go to OpenKM administration, select the option automation and new rule, fill with the name "**Invoice upload**", select the even **create**" and check the box "Active".



In the file **invoice-capture.properties** (found in Tomcat's folder) you define the uuids for both folders created in OpenKM:

standard.import.node = bb381ac2-f3f6-42b4-8df6-fbd0e87054ce

advanced.import.node = 76d1c3c7-d085-47ec-a153-c146e63ee9d9



The value of the UUID of the nodes depend on your OpenKM instance.

Register metadata

Go to the **OpenKM Administration** > **Metadata** and register the below metadata definition

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE property-groups PUBLIC "-//OpenKM//DTD Property Groups 3.9//EN"
"http://www.openkm.com/dtd/property-groups-3.9.dtd">
<property-groups>

<property-group label="Document type" name="okg:invoice_doc_type">
  <select label="Type" name="okp:invoice_doc_type.type" type="simple" optionsQuery=
</property-group>

</property-groups>
```

Standard mode



User works in **standard mode** when is a member of **ROLE_STANDARD**.

A user with this role is assigned TO one company, and he is able to catalog invoices just for this company.

In the Standard mode, users are able to **catalog invoices** and **search for invoices** by its company assigned, document type, year and month.

Catalog invoices with metadata

1. Click on **STEP 1** option located at the **top left menu**
2. Add invoices from your local disk by clicking on **Add files** button, and upload them by clicking on *the Upload* button for each one (or clicking on *the Upload all* button).
3. Once you have uploaded the invoices, click on *the STEP 2* option at the **top left menu**.
4. Set invoice metadata for each uploaded invoice in the previous step. To confirm the changes click on the **Add** button.

This button will be enabled when the form is fully completed.



In the metadata form, the field *Company name* is the company assigned to this user.

Search for invoices

1. Click on the **SEARCH** option on the **top-right menu**.
2. Fill in the year and month fields then click on the **Search** button.
3. A list of invoices filtered by the companies of the user, document type, year and month will be shown.



A row in a table with fields *Type, Name, Size, Author, Date, Tax number, VAT, and Total* is shown for each invoice.

In each row, you can see a **Download** button to download the invoice.

Advanced mode



User works in advanced **mode** when is **member of ROLE_ADVANCED**.

A user with this role can catalog invoices for the company assigned to the user.

In the advanced mode, users are able to **catalog invoices** and **search for invoices** by companies (providers), document type, year and month.

Catalog invoices with metadata

Same as explained above for Standard mode.



In the metadata form, the field *Company name* is a **list** of companies **created by an admin user**.

Search for invoices

Same as explained above for Standard mode.

Admin mode



User works in **admin mode** when is **member of ROLE_ADMIN**.

By default, the app contains an admin user named *admin*.

In the Admin mode users are able to **catalog invoices**, **manage companies**, **manage users**, and **search for invoices** by year and month.

Companies management

1. Click on the **COMPANY** option on the **top-right menu**.
2. Fill in the required fields: **Tax number** and **Name**, and **optionally Internal code** to create a new company and finally click on **Add** button.
3. In the list of companies you can edit or delete companies, by clicking on the **Edit** button or **Delete** button respectively.

Users management

1. Click on the **USERS** option on the **top-right menu**.
2. Fill in the required fields: **Id**, **Password**, and **Name**, assign a **role**, and **optionally** assign a **company** to create a new user and finally click on **Add** button.
3. In the list of users you can edit or delete users, by clicking on the **Edit** button or **Delete** button respectively.

Changelog 1.x

Invoice Capture v1

v1.2

- Released 2020-11-05
- Code improvements
- Bugs resolved
- Now the logos of the application are taken from OpenKM

v1.1

- Released 2020-07-24
- Some translations corrected
- Code improvements
- Usability improvements
 - Bootstrap-select component added

v1.0

- Released 2020-07-17
- Compatibility with OpenKM 7.14