



SoftRobot Platform Functional Specification

v 1.2

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1. Definitions

The definitions of objects in this document and the SoftRobot Platform itself are described in the following section.

”**Licensee**” means a business customer to SoftRobot that is granted a software as a service license to the SoftRobot Platform. “**Workspace**” means a legal entity and a customer to SoftRobot AB using the SoftRobot Platform. “**Collection**” means a container for a number of Workflows within. “**Workflow**” means a process that consists of a number of Columns. “**Column**” means an individual step within a process. “**SoftRobot**” means the person(s) that setup, designs and configures the Workspace, the non-predesigned Collections and the Workflows. “**Owner**” means the person(s) that has access to all settings, files and user administration within a Workspace and who can add predefined Collections to the Workspace. “**Member**” means the person(s) that has access to all Settings and Items within a specified no. of Collections within a Workspace. “**Approver**” means the person(s) that has access to a specified no. of Items within a specified no. Collections, Workflows and Columns within a Workspace. “**Uploader**” means the person(s) that only has Upload access to a specified no. of Collections and Workflows within a Workspace. “**User**” is a person or group of persons with an account linked to an email address and assigned to any type of role in the SoftRobot Platform. “**Workflow View**” means the Workflow process overview consisting of a number of Columns (steps). “**Item**” means the digital file being uploaded to, processed in or exported from the SoftRobot Platform and represented as draggable blocks within the Workflow View. “**Raw Data**” means unstructured data in the form of documents or document content. ”**Middleware**” means custom software developed by SoftRobot outside of SoftRobot Platform for the purpose of enabling Integration(s) when the Licensee’s systems cannot interoperate with SoftRobot Platform directly through the API. “**Field**” means a categorised type of value being predicted by the SoftRobot Platform and put in to a dedicated textbox meant explicitly for this value. “**Shared**” means that the model data being used in order to predict a Document Data, Field Data or Domain Data value is shared with other Licensees of the SoftRobot Platform and that the processed Items are contributing to this model data. “**Item View**” means the administrative view of a file currently being handled in the SoftRobot Platform. “**Archive**” means the last Column (step) in a Workflow where Items never move from except when deleted. “**Workflow Session**” means the period time an item spends within the Workflow until it reaches the Archive. “**Notification Method**” means the method to deliver the notification to participate in a Workflow Session for a no. of specified Items. “**Settings View**” means the administrative user interface in the SoftRobot Platform for the purpose of configuring a specific part of the service, i.e. the Workspace, Collection, Workflow and Column as well as the user interface for the purpose of adding, removing or modifying the Users within a specific Workspace. “**Accounting Flow**” means the part(s) of the SoftRobot Platform user interface specific to the Accounting Domain.

1.1 Standard Data Item

A Standard Data Item is defined as a:

- Digital file containing/carrying textual content and in any of the following formats and file extensions:
 - PDF version 1.5 and higher (including PDF/A-2 and higher)
 - JPG/JPEG (minimum 300 dpi)
 - PNG (minimum 300 dpi)
 - TIF/TIFF (minimum 300 dpi)
- Containing data labelled and/or classified as an item listed in sections 1.1.1 or 1.1.2.
- The Item shall have textual content and be divided into pages representing a physical size of A2, A3, A4 or A5.
- The textual content in the file shall be *fully legible* in the above size formats
- The amount of textual content shall cover no less than 25% of the page if it is a 1-page Item

1.1.1 Document Data

Document Data is defined in the SoftRobot Platform as predictions of the following actual document classes based on the textual content of the Item:

- **Supplier invoice**
- **Customer invoice**
- **Credit invoice**
- **Cashier report**
- **Receipts**
- **Payroll documents**

With the following prerequisites applied on the Item and its contents in order to be counted as Document Data:

- The textual content shall be in English or Swedish language
- Licensee contributes to and utilizes the Shared Document Data in the SoftRobot Platform or else, has been trained with minimum 2 000 Items per custom Document Data class, supplied by the Licensee with the type of Document Data that are to be delivered by the SoftRobot Platform.

1.1.2 Field Data

Field Data is defined in the SoftRobot Platform as predictions of the following actual textual data values extracted from the Item:

- **Total (amount)***
- **VAT (amount)***
- **Due date***
- **Invoice/issue date***
- **Invoice number***
- **OCR**
- **Bankgiro**
- **Plusgiro**
- **IBAN**
- **Currency (3 letter code)***

With the following prerequisites applied on the Item and its contents in order to be counted as Field Data:

- The textual content shall be in English or Swedish language
- The value that is predicted must be explicitly stated on the item itself
- The format of the Field Data on the Item and its validations is according to regulated, and if applicable – international, standards for this type of textual content in its original Raw Data format
- Feedbacked (training) data is according the SoftRobot Platform API standard (via Middleware or not)
- Licensee contributes to and utilizes the Shared Field Data in the SoftRobot Platform or else, has been trained with minimum 5 000 Items, supplied by the Licensee with the type of Field Data that are to be delivered by the SoftRobot Platform.
- All the abovementioned Field Data that has built in validations on its predicted value, such as checksum digit and logical tests (such as invoice/issue date \leq Due date, VAT (amount) $<$ Total (amount)) must validate thus having its *valid* parameter set to **true** and the above listed Field Data that is marked with an asterisk (Total (amount), VAT (amount), Due date, Invoice/issue date, Invoice number and Currency (3 letter code)) must be present in the Raw Data. This in turn makes the entire Item's *state* parameter being set to **interpreted**.

1.1.3 Domain Data

Domain Data is defined in the SoftRobot Platform as predictions of the following actual labels based on the textual content of the Item:

- **Account number (4-digit account code)**
- **Debit or Credit (amount)**
- **Cost Center**
- **Project**

With the following prerequisites applied on the Item and its contents in order to be counted as Domain Data:

- The textual content shall be in English or Swedish language
- Licensee contributes to and utilizes the Shared Domain Data in the SoftRobot Platform or else, has been trained with minimum 5 000 Items per custom Domain Data category, supplied by the Licensee with the type of Domain Data that are to be delivered by the SoftRobot Platform.

2. Architecture hierarchy

The architectural hierarchy of Aiida is divided into 4 entities.

2.1 Workspace

The highest entity which represents a customer. In cases where there are Users needing access to multiple workspaces there is a feature to switch between workspaces in the Workspace selector under the User icon.

2.2 Collection

The second highest entity which represents a number of (a collection of) Workflows, this entity can either be a folder for the workflows within and not have any practical function or it can represent a client/company that is handled by the Workspace and its users. The classifier feature of the SoftRobot Platform automatically classifies any Standard Data Items that get imported/uploaded directly to the Collection and puts the Item in the corresponding Workflow which represents a number of potential classes the classifier might classify the Item as.

2.3 Workflow

The third highest entity which represents an actual process within the Collection. Within the Workflow the user can access the Items within the process and manage the files in each step (Column) of the process. By clicking on an item in the Workflow viewer the Item View for the specific Item opens up.

2.4 Column

The lowest entity represents an individual step in the process of handling an Item that all together makes up for the complete Workflow. Each Column applies a specific event to the Items when they first enter the column, these can be events like, but are not limited to events like “Export the Item”, “Interpret the Item”, “Archive the Item”.

3. Feature index

The SoftRobot Platform supports an Item handling process where a Document Data classification, Field Data interpretation and a Domain Data specific task is being performed, accessible via the cloud (web app) and in a mobile app. All features are not supported on all platforms. The following is a list of all functional features of the SoftRobot Platform on each platform. All features are described in more detail in the following sections of this document with the mobile app version in a separate dedicated section.

3.1 Designing the Workspace (SoftRobot)

These are features related to defining the Workspace design. Only available through the API as a SoftRobot User.

No.	Feature	Mobile app	Web app	API
4.1	Naming the Workspace			v
4.2	Selecting the data storage			v

3.2 Designing the Collections (SoftRobot)

These are features related to defining the Collections design. Only available through the API as a SoftRobot User.

No.	Feature	Mobile app	Web app	API
5.1	Naming the Collection			v
5.2	Classification of Items into Workflows			v

3.3 Designing the Workflows (SoftRobot)

These are features related to defining the Workflows design. Only available through the API as a SoftRobot User.

No.	Feature	Mobile app	Web app	API
6.1	Placing the Columns			v
6.2	Placing the Fields			v
6.2.1	Addition of non-Standard Data Fields			v
6.2.2	Toggling Field Data validation			v

3.4 Settings (Owner)

These are features related to the Settings menu.

No.	Feature	Mobile app	Web app	API
7.1	Toggling Autopilot		v	v
7.2	Create a Column		v	v
7.3	Remove a Column		v	v
7.4	Delete a Workflow		v	v
7.5	Delete a Collection		v	v

3.5 Add predesigned Collections and Workflows (Owner)

These are features related to adding predesigned Collections and Workflows to the Workspace. All the following features are based on displaying a graphical user interface to the User, therefore they are not applicable to the API.

No.	Feature	Mobile app	Web app	API
8.1	Adding and removing a Standard Accounting Collection		v	N/A
8.1.1	Guide – step 1: setting up the Organization and its name		v	N/A
8.1.2	Guide – step 2: setting up the ERP integration		v	N/A
8.1.3	Guide – step 3: synchronize ERP with the SoftRobot Platform		v	N/A

3.6 Administer Approval Columns (Owner)

This is how the Approval Columns can be administered and configured. All the following features are based on displaying a graphical user interface to the User, therefore they are not applicable to the API.

No.	Feature	Mobile app	Web app	API
9.1	Displaying the Flows overview		v	N/A
9.1.1	Connecting Users and Column in the Flows overview		v	N/A

3.7 Initiate Workflow processing (Owner & Member & Approver & Uploader)

These are the different methods to upload/import Items to the SoftRobot Platform.

No.	Feature	Mobile app	Web app	API
10.1	Using the Collection entity as a classifier initiator	v	v	v
10.2	Input of Items via e-mail	N/A	N/A	N/A
10.3	Input of Items via upload button in the user interface		v	
10.4	Input of Items via the mobile app	v	N/A	N/A
10.5	Input of Items via the API			v

3.8 Administer/Modify the Workflow execution (Owner & Member)

These are features for managing the Workflow execution.

No.	Feature	Mobile app	Web app	API
11.1	Navigating the Workspace viewer		v	
11.2.1	Counter (badges) on the Collections and Workflows and Notification Method		v	
11.3.1	Upload Item	v	v	
11.3.2	Email icon		v	
11.3.3	User icon		v	
11.4.1	The Control/Kontroll/Inbox Column functionality		v	v
11.4.2	The Export Column functionality		v	v
11.4.3	The Approval/Attest Column functionality	v	v	v
11.4.4	The Archive/Bokfört Column		v	v
11.4.5	The Select items functionality		v	v
11.5.1	Delete Item		v	v
11.5.2	Retry Item		v	v
11.5.3	Inspect Log		v	v

11.5.4	Download Item		v	v
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3.9 Item Viewer management (Owner & Member & Approver)

These are features for Item Viewer administration.

No.	Feature	Mobile app	Web app	API
12.1	Field Data visualization		v	v
12.2.1	Accounting Flow section		v	v
12.3	Page section functionality	v	v	v
12.4.1	Edit Field Data (Save) button		v	v
12.4.2	Moving Item forward or backward		v	v
12.4.3	Approval: Approve button	v	v	v
12.4.4	Approval: Forward button	v	v	v
12.4.5	Approval: Reject button	v	v	v
12.5.1	Zoom in and out on the Item	v	v	
12.5.2	Toggle the extracted fields		v	v
12.5.3	Toggle the active extracted fields	v	v	v
12.5.4	Download Items		v	v
12.6	Commenting on Items	v	v	v

3.10 User administration (Owner)

These are features for User administration.

No.	Feature	Mobile app	Web app	API
13.1	Invite User button		v	v
13.1.1	Setting the User email		v	v
13.1.2	Setting the User login method		v	v
13.1.3	Assign role(s)		v	v
13.2	Modify an existing User		v	v
13.3.1	Setting User role		v	v

13.3.2	Setting User role: Member		v	v
13.3.3	Setting User role: Approver		v	v
13.3.4	Setting User role: Uploader		v	v

4. Designing the Workspace (SoftRobot)

Setting up the Workspace is the first practical step when setting up a new Licensee in the SoftRobot Platform. This needs to be done before setting up and configuring the rest of the content within the Workspace.

4.1 Naming the Workspace

Choosing a name for the Workspace that will be visible in the top left corner in the Workspace viewer, Workflow View and the Workspace selector. This name can be chosen freely as each entity is also represented by a unique identifier within the service.

4.2 Selecting the data storage

There is a possibility to select a specific data storage for the Workspace thus making all the Items and model data that gets uploaded to and produced in and this Workspace reside on this supplier's servers.

Below is a list of the possible cloud storage suppliers currently available in the SoftRobot Platform:

Name of cloud supplier	Country where the servers are located
Google Cloud Platform	Finland (EU) for databases & "Multiple regions in EU" for files
Elastx	Sweden (EU)

5. Designing the Collections (SoftRobot)

The Collection setup is a necessary step in setting up a usable Workspace. Minimum one Collection is necessary in order to hold a Workflow which in turn contains the actual process mapped out in a number of Columns.

There is a modular way of setting up and configuring new Collections within the SoftRobot Platform. See section 8 for a description of this.

5.1 Naming the Collection

Choosing a name for the Collection that will be visible on the folder that represents the Collection itself. The Collection folder contains the Workflows that are represented by the folders under the Collection folder.

If the Collection is of a predesigned Collection setup the naming of the Collection can be locked to a specific name that is defined in its design.

5.2 Classification of Items into Workflows

A selectable feature on the Collection is the classification. By uploading (sending) an Item to the Collection instead of a Workflow directly the Collection applies classification on the Item, thus classifying the Item into one of the possible Document Data types the Collection has been designed to utilize when classifying.

6. Designing the Workflows (SoftRobot)

The Workflow setup is the key in creating an Item handling process in the SoftRobot Platform. The Workflow design and its steps, represented in the Columns, describes how the Items that get into the Workflow, get handled. At its core are the possible Field Data and Domain Data that can be configured individually in each Workflow independent of the Collection it resides in.

6.1 Place Columns

The Columns make up for the individual steps in the Workflow process and each type of Column adds one action that takes place upon the Item.

Each Column can be named individually, but they all belong to a specific type that decides what kind of unique features they have. The following Column types are available when designing the Workflow process and they are further described in section 11.4.

- Inbox (a.k.a. Kontroll/Control)
- Approval (a.k.a. Attest)
- Export
- Archive (a.k.a. Bokfört)

6.2 Place Fields

The Fields are an integral part of the Workflow configuration as they make up for what Field Data and sometimes, Domain Data that can be predicted from the Items Raw Data.

There is no limit on how many individual Fields and Field Data the SoftRobot Platform can predict values for altho only the ones mentioned in section 1.1.2 are the ones the SoftRobot Platform have pre trained and have warranties for.

The Fields have a number of configurations that are made on them, those are listed below.

6.2.1 Non-Standard Data Items

Additions of non-Standard Data Items can be done at any time and when doing so the newly created Data Item (Field in this case) will not utilize a pre trained model in order to make predictions on its value unless this has been done beforehand. This means that a non-Standard Data Item will produce lower than average results on prediction performance unless a pre-training has taken place.

When setting up a new non-Standard Data Item in case it's a new Field the content has to be specified in order to specify how the storage should be formatted. The regular data types are applicable here.

6.2.2 Field Data validation

Usually the values that are predicted in the Fields have some kind of way of being validated, either via the format, its content or any eventual built in checksum(s). This validation is connected to the specific Field Data.

7. Settings (Owner)

The Settings view is reachable from the User icon in the upper right corner. The User remains in this Settings view until the X symbol in the top right corner is clicked, then the view goes back to the regular View for the entity currently highlighted in the Workspace explorer to the left. As long as the user remains in Settings mode the User can enter into different entities in the Workspace explorer, displaying the Settings for the Workspace, Collection, Workflow and Column, respectively.



7.1 Autopilot

The Autopilot feature allows the SoftRobot Platform to automatically move validated (green circle) Items further along in the workflow, from the beginning (left) to the end (right).



If toggled on and the Item validates in the Inbox/Control/Kontroll Column the Item will be moved to the next step in the Workflow after the current Columns actions has taken place. Note that if the Item is in a Workflow where a manual User approval must happen before it can move further then the Autopilot won't be able to move the Item along in the Workspace until this type of Column has passed.



The icon with the two ii:s are put on a Collection or Workspace that has the Autopilot toggled on.

7.2 Create Column

In the Workflow Settings the Create Column button is visible. When clicked the dialogue window shows up asking the User what kind of Column they would like to add to the Workflow.

The screenshot shows a 'Create Column' dialog box with the following fields:

- Name:** A text input field.
- Type:** A dropdown menu.
- Position:** A dropdown menu.
- CREATE:** A blue button at the bottom.

- **Name:** Can be selected freely
- **Type:** Two different types of Columns are available; Approval/Attest and Archive/Bokfört
- **Position:** Lets the User select where in the Workflow this Column should reside

7.3 Remove Column

Remove Column is a feature available under the Column Settings by highlighting a specific Column in the left screen side Workspace explorer, under Collection and under Workspace.

7.4 Delete Workflow

Delete Workflow is a feature found in the Workflow Settings view in the lower right corner. This feature lets you remove an entire Workflow from within the SoftRobot Platform.

7.4 Delete Collection

Delete Collection is a feature found in the Collection Settings view on the right side of the screen. This feature lets you remove an entire Collection from within the SoftRobot Platform.

8. Add pre designed Collections and Workflows (Owner)

As an Owner in the Workspace you can manually add new Collections that is pre designed in such a way they have a predefined setup regarding both the Collection design and the Workflow design, which Workflows that are included and the Field Data and possible Domain Data that should be predicted on the Item.

8.1 Standard Accounting Collection

Adding and removing a Standard Accounting Collection can be done by clicking on the button “+ Add Standard Collection” in the Workspace explorer on the left side of the screen.

Clicking this button open up a 3-step guide to add a predefined Collection design.

8.1.1 Guide – step 1: Type of Standard Collection

First up in the Guide is to choose which type of Standard Collection we’re about to add. Currently only the Accounting domain is available.

8.1.2 Guide – step 2: Organization number, its name and ERP integration

Next step is set up of the Collection itself, which starts with giving the SoftRobot Platform the organization number of the Client Company and also selecting a Name for the Collection, as default the Company’s formal name is suggested. The last part of this step is setting up which ERP system the SoftRobot Platform shall integrate with. Currently only an integration to the ERP Fortnox is available.

8.1.3 Guide – step 3: Synchronization

The last step of the Add Standard Collection guide is the synchronization between the ERP and the SoftRobot Platform. During this synchronization all the Client specific data needed in order to make as correct Field Data and Domain Data predictions as possible are being fetched.

9. Administer Approval Columns (Owner)

The Approval type of Column has its own Settings in such a way that these Columns may contain several Users that might be needing to manually approve the Items that enter the Column. The process of visualizing and configuring these types of columns are described in the section.

9.1 Flows overview

The Flows overview are shown by entering the Settings while highlighting a Workspace in the Workspace explorer to the left of the screen.

This subsection of the Workflow Settings shows how an Item entering a Approval Column in a Workflow can move within the number of Approval Columns that might be included in a Workflow.

There is no limit on how many Approval Columns or Approver roles an Owner can add to a Workflow.

The way of adding and removing an Approval Columns or Approver roles to the Workspace and the specific Workflow are described in section 7.2, 7.3 and 13.3.

Note that only Approver Roles assigned to the specific Collection will be showing up in the Flows overview, no Member or Owner roles will show up here automatically. If a User currently assigned to an Owner, Member or Uploader Role needs to be in the Approval process, then that Role needs to be explicitly assigned to this User as well. A User can have multiple Roles within a Collection. Members and Owners will always have access to the Items within these Approval Columns as they are also supposed to be able to administer the complete Workflow, even though they are not part of the formal Approval process.

9.1.1 Connecting Users and Columns in the Flows overview

The route the Item takes while passing these Approval Columns are decided by how the Columns and any eventual Approvers are connected by the lines and dots in the Flow overview.

The Owner modifies the flow of the Item by dragging a new path from one dot to another either on the Column name header or next to a specific User. By selecting the left side dot Column in an Approval Column this means that all Users in that Column will have the option to handle (Reject and Forward) all Items currently in that Column. By connecting and selecting a specific User in the Column the Item will be sendable, manually or automatically via the Autopilot, only to a connected User. Note that multiple specific Users are possible to select as receivers in the Columns. Other, not specifically connected Users residing in a Column where a specified receiver has been chosen will only be able to receive an Item if a specific User that received it originally from the previous Column, has forwarded an Item to them.

Likewise, if the Column header is connected from the right-side dot to the following Column's header dot on the left side all Approvers in the left Column will have the option to send (Approve) the Items to the following Column.

For the example Flow visualized in the above section 9.1 the setup represents the following:

- From the Kontroll Column the Items are sent to just member@softrobot.io.
- member@softrobot.io can forward/send the Item to the other Approvers in the same Column (demobolaget4attest1@softrobot.io and attest@softrobot.io) for Commenting and feedback.
- demobolaget4attest1@softrobot.io and attest@softrobot.io can only send the Item to other Users in the Column.
- Only member@softrobot.io can send the Item forward in the Workflow to the next Column by Approving the Item.

More on this feature in section 12.4.3, 12.4.4 and 12.4.5.

10. Initiate Workflow processing (Owner & Member & Approver & Uploader)

This section describes all the possible ways to initiate a Workflow processing action by Uploading or sending in (a) file(s) to the SoftRobot Platform.

10.1 Optional classification

By Uploading the Item to the Collection instead of a Workflow the classification feature of the Collection is automatically induced upon the Item. The classification feature of the Collection entity will predict which of the Document Data classes the Item belongs to. The type of classes that are being used are specified during the design of the Collection and also represented by the underlying Workflows and the classification feature will utilize these when doing its predictions.

Any Items uploaded to the Collection entity will because of this feature never stay at a Collection but always move into one of the underlying Workflow folders.

This feature is briefly described in section 11.3.1 as well.

10.2 Email

Input of Items via mail is a common way of receiving and importing new Items into the SoftRobot Platform. This is usable in order to send in Items both to the Collection and the Workflow entity. The e-mail addresses are created at the beginning when the Collections and Workflows get designed for the first time in the Workspace and are visible when hovering over the Mail icon in the top right corner of the Workflow View.

This feature is further described in section 11.3.2.

Usually these mail addresses are either used directly and given out to senders of material to the Workspace but another common way for Licensees is to have this same kind of setup on a “Collection” level on their own side and using their own mail servers as a proxy that then just forwarding any incoming e-mail directly to its corresponding Collection, or Workspace, entity.

The SoftRobot Platform will treat all attachments in the incoming emails, that is a Standard Data Item, as new Items being uploaded, with some filtering (in order not to consider any obvious signature logos as possible Items). 1 to N no. of Items are allowed in one single email (no fixed limit) but note that all attachments will be considered individual Items when uploaded via e-mail.

10.3 Upload via SoftRobot Platform interface

An efficient and commonly used way of uploading an Item that is located on a folder you have direct access to is to use the Upload feature directly in the SoftRobot Platform interface. A User can either click on the Upload button and get a standard file picker dialogue where the local and connected directories are listed and the files selectable. Or a User can just drag-n-drop (a) file(s) directly on to the Upload button and the Item(s) will be Uploaded to the currently highlighted Collection or Workflow in the Workspace explorer to the left on the screen.

This feature is further described in section 11.3.1.

Keep in mind that the current limit of the number of files per Upload via this feature (and the API) is 20 Items. If any more than 20 Items are selected and either dragged into the button or picked in the file picker dialogue window only the first 20 Items will be uploaded.

10.4 Mobile App upload

Another very efficient way of uploading physical material is by taking a photo of the Item that needs to be processed by the SoftRobot Platform with the Mobile App. For instance, receipts or physical papers that need to be handled efficiently and before they get lost.

This feature is further described in section 14.3.1.

10.5 API

Below section is a part of a quick reference guide for using the API to upload Items to the SoftRobot Platform. For the complete interactive API documentation see section 15.

10.5.1 Authentication

POST [/authenticate/client](#)

The response from successful authentication (status code 200) will return an authorization token. This token needs to be passed in the header ('authorization') for all other calls to the webservice.

10.5.2 Upload a file

POST [/items](#)

10.5.3 Poll Item to determine when values have been predicted

GET [/items/{item_id}](#)

Check the "state" key. If an item has the state...

- "interpreted", it's valid and the values are ready to be used.
- "incomplete" then the document is interpreted but not all fields are valid. For more detailed information, look at the values "valid" state to see exate what field(s) was wrong.
- "error" that means that some error happened so the document could not be interpreted
- "processing" means that the interpretation is not yet finished.

In the API response from the SoftRobot Platform there's a flag that is set to either Interpreted or Incomplete. *Interpreted* meaning the Item has been handled without error and the Field Data has been validated according to the standard validations applied in the SoftRobot Platform. *Incomplete* meaning the Item has been handled without error and the Field Data has not been validated according to the standard validations or is missing Field Data deemed necessary by the SoftRobot Platform, this corresponds to the yellow Not Validated Item symbol described in section 11.4.1.

10.5.4 Get Item values

GET [/items/{item_id}](#)

Use field_id to identify what field the value belongs to. Key "value" contains the formatted value.

11. Administer/Modify the Workflow execution (Owner & Member)

In order to administer and handle the Workflow process the overall view when not inside a specific Item or in the Workspace viewer described below, you're in a view where individual workflows can be handled. The below section will describe all separate parts of the Workspace Administration process and the features therein.

11.1 Workspace viewer

The Workspace Viewer is accessible by clicking on the top left corner where the Workspace name is.

The Workspace Viewer is a feature to further improve the supervision of *all* the Items the current User has access to and facilitate a quick overview of the entire Workspace. If the User wants to focus on a specific Collection, Workflow or Column then that type is possible in drop-down filter selectors.

Most of the categories (column headers) in the Workspace Viewer are sortable in ascending and descending order.

The following sortable categories exist:

- Status [validated (green circle), not validated (yellow circle with exclamation mark inside it), error (red circle with exclamation mark inside it)]
- Name [the Items name in the SoftRobot Platform when it got uploaded]
- Uploaded [the initial timestamp when the Item got Uploaded to the SoftRobot Platform]
- Collection [which Collection the Item resides in]
- Workflow [which Workflow the Item resides in]
- Column [which Column the Item resides in]
- Miscellaneous [any available Item information]

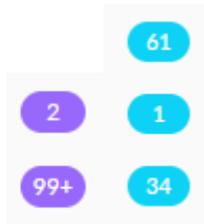
11.2 Workspace explorer section

In the leftmost section of the screen there is always, unless entering an Item when the Item Viewer covers it, a Workspace explorer showcasing all the Collections and, an explorer view where multiple Collections and Workflows can be visible if the Collection folder is expanded.

Note that you only have access to the Collections you actually are assigned to and thus allowed to see if you're a Member. Likewise, for Approvers and Uploaders. An Owner sees all the Collection (and Workflows) his Workspace has.

11.2.1 Counters (badges) and Notification Method

Next to the Collection and Workflow folders in the Workspace explorer on the leftmost side of the screen there are Counters available for the Users that have access to the respective Collection and Workflow. The Counters sum up all the number of Items the User currently has residing in the leftmost *Column* in the specific Workflow or as in the Collection case, the number of Items the User currently has residing in the leftmost Columns in *all the Workflows* within the Collection.



11.3 Top menu section

The top menu consists of a number of buttons or menu choices, all of which are described in this section.



11.3.1 Upload Item

The Upload button will be visible if the User is highlighting a single Collection or Workflow in the Workspace explorer on the left side of the screen.

Clicking the Upload button opens up a classic file picker native to the OS of choice. In the file picker one can select 1 to 20 files as a time. If more than 20 files are selected and uploaded at the same time, 20 Items will be uploaded as the SoftRobot Platform has a limit on the number of simultaneous uploads.

Another possible way to Upload Items efficiently is to just drag-n-drop your files directly to the Upload button and they will be Uploaded to the appropriate Workflow or Collection.

Remember that when uploading Items Directly to the Collection the SoftRobot Platform will automatically try and classify the Item into one of the underlying Workflows. If uploaded directly to a specific Workflow then the Item will start with entering the first Column in the selected Workflow directly.

11.3.2 Email address

All Collections and Workflows in the SoftRobot Platform each have individual email addresses for uploading Items via mail. These email addresses are constructed with the syntax of:

`<workspace>.<collection>@aiida.io` or `<workspace>.<collection>.<workflow>@aiida.io`

When hovering over the mail icon the specific email address will show up in a tooltip and when clicking on the mail icon the specific email address will get copied.

11.3.3 User icon

The User icon holds numerous clickable links that open up in a drop-down menu.

- **Change Workspace** Opens up the Workspace selector where all the Workspaces the Current User has access to are listed
- **Settings** Open up the Settings view for each respective entity (Collection, Workflow and Column) and its contents are further described in section 7
- **Log Out** Logs out the User (ends the session) and returns the User to the Login screen

11.4 Workflow process (Columns) overview section

The different Column types decides what kind of unique features/functionality they have. That functionality is described further in this section's subsections and in general terms in this list:

Column type	Explanation
Inbox/Kontroll/Control	The initial Column in each Workflow applies the Field Data and Domain Data functionality and tries to predict the values that the Workflow design has stated it should
Approval	A Column type for when the Item needs to go thru a manual approval process, can be utilized in a way where there are several Approval Columns after each other and where several Users can be involved in a vertical dimension as well, thus sending an Item to different Users whilst remaining in the same Column
Export	A Column for exporting the Item together with any collected Document, Field and Domain Data acquired during the earlier steps/Columns in the Workflow
Archive	This type of Column is always the last Column in a Workflow meaning the Items shall remain and not be moved from this column unless they get deleted (manually or automatically as configured in the Workflow design)

11.4.1 The Inbox Column

The first type Column that the Items enter into when getting into a Workflow. This Column applies any Field Data and Domain Data features/predictions as well as any validations on them. After this Column has applied its actions and the light blue circular icon stops moving the Item ends up in one of three Statuses:

Status icon	Explanation
-------------	-------------

	Validated Item, nothing stops it from being transferred, either manually or by the Autopilot to the next Column in the Workflow
	Non Validated Item where something doesn't add up or where something has failed to be predicted, need manual supervision in order to be transferred correctly to the next Column in the Workflow
	Erroneous Item where something has gone wrong, usually the Item cannot be properly opened/read or the file is damaged

At this step all the necessary data is trying to be predicted/gathered in order for the SoftRobot Platform to apply more actions to the Item and push it further to the end of the process.

11.4.2 The Export Column functionality

Upon arriving at the Export Column, the Item's Document Data, Field Data and Domain Data (depending on how the Workflows settings) is getting exported to a preset destination. This can either be an integrated delivery destination, an FTP destination or a destination chosen by the Licensee.

The Items stays in the Export Column if it's the last Column in the Workflow or if it's in a Workflow that uses a delivery method thru an integrated system to the SoftRobot Platform and has an Archive Column. In the latter case the Item is automatically moved to the next (Archive) Column thru the synchronization between the SoftRobot Platform and the integrated system after the Item gets moved from the original delivery destination meanwhile fetching any eventual changes on the Item.

11.4.3 The Approval/Attest Column functionality

The Approval Column lets the Users *manually* approve the Items. This approval design configuration is further described in section 9, Administer Approval Columns. Several Users might be involved in the Approval process. Items arriving in an Approval Column must stay there until they are manually Approved by the amount of Users stated in the Approval flow and then moved (Approved) to the next Column.

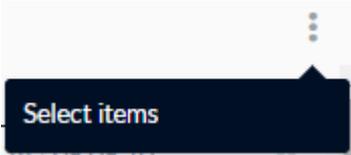
11.4.4 The Archive/Bokfört Column

This Column represents the last Column in the Workflow process. Items are not supposed to move further from this Column although they can be moved manually via drag-n-drop if necessary, but

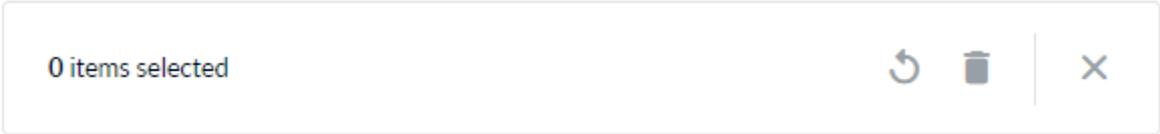
not from the usual Item Viewer. The Items remain here until deleted manually or automatically by the Workflow's configuration.

11.4.5 The Select items functionality

The Select items feature that is reachable by clicking on the three dots on the top/header of any Column in the Workflow you gain access to a fast way of selecting multiple items at once and then performing the same task on all of the select Items.

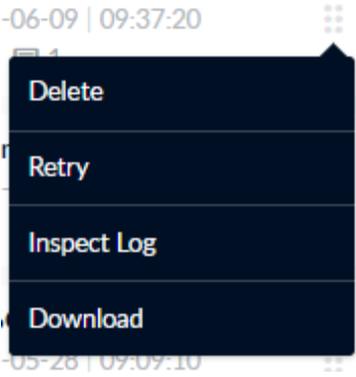


The tasks that currently are available to perform on a mass selection of Items are Retry (the circular arrow icon) and Delete (the trash bin icon), described in section 11.5.2 and 11.5.1 respectively.



11.5 Item drop down menu

As a User with access to Items in a Workflow you can click on the small dots on the right to the item in order to find a drop-down menu with several choices of action to take on the specific Item. These are described in detail in this section.



11.5.1 Delete

The option to Delete an Item anywhere in the Workflow process as available to a User with access to an Item.

The Deletion feature will remove the specific Item but not before the User has confirmed the deletion by showing a Dialogue window making sure the User actually wanted to remove this specific Item.

11.5.2 Retry

Any Retry Item clicks tries to redo the current Columns action/feature on the specific Item. If successful, any previous error states will change, and any validations will retry in order for the Item to then validate and if applicable move the Item further in the process.

11.5.3 Inspect Log

The Inspect Log button opens up a dialogue window containing the public log the specific Item. This log lists all major events that has happened on the Item, whilst being in the SoftRobot Platform, up until the moment of Log opening. The log contains the following data:

- Name The user or process that initiated the event (the name “Internal” is used for actions that are automatically performed by the SoftRobot Platform)
- Message The actual event message gotten from the code in the SoftRobot Platform or any integrated service
- Time A timestamp on when the event took place on the Item

This log data can be useful in order to identify any errors occurred on the Item. After correcting those, if possible (e.g correcting a badly formatted input value), the “Retry” button can be used in order to see if the error state is fixed.

11.5.4 Download

When clicking the Download Item button, the Item and any acquired Document, Field and Domain Data gets zipped and downloaded in the browser for the User to handle manually on their hard drives. The zip file is automatically downloaded to the Standard Downloads-folder on the User’s system.

12. Item viewer management (Owner & Member & Approver)

The Item viewer opens up when clicking on an Item. It consists of two major sections, the Data section to the left on the screen, containing all the Field and eventual Domain Data, and the viewer section itself where the visual representation of the Item is presented.

The viewer section is interactive in such a way the User can click and click-and-drag on the visuals in order to fetch Raw Data into highlighted Fields in the Data section. The Data section contains all the Field Data and Domain Data which is clickable as well and accepts textual data input from the keystrokes as well.

12.1 Field section

In the Field section of the Item viewer all the Field Data values from the Item is displayed. The SoftRobot Platform will try and populate all the Fields that are included in the Workflow. The User can highlight any of the Fields by clicking on it and then move further down the list of Fields by pressing the TAB key.

Whilst highlighting a Field the User can manually put in new data into the Field by using the keyboard or by clicking or click-and-drag on the representation of the Item in the viewer. By doing so the User overwrite the predicted Field Data value thus *supervising* the learning process. If the Field Data value the User currently highlights contains a predicted value found on the Item, a pink colored rectangle will showcase its geographical position on the Item in the viewer.

Organisationsnummer 556356-5612
Leverantörsnamn MECA Sweden AB
Bankgiro 5318-1277
Plusgiro
Momsregnummer SE556356561201
IBAN SE3650000000051181020255
Valuta SEK
Fakturadatum 2019-06-30
Förfallodatum 2019-08-14
Totalt 8308.00
Moms 1661.50
Fakturanummer 11771457
OCR 1177145701

12.2 Domain section

The Domain section on the left side of the screen visualizes any Domain specific predictions that the SoftRobot Platform have made. The Accounting Flow or Accounting AI being the first Domain specific one.

12.2.1. Accounting Flow section

The Accounting Flow Domain Data specific part of the user interface is located in the lower left section of the Item Viewer screen. This contains the Domain specific user interface boxes that includes the following:

Domain specific UI	Explanation
Accrual account, Start date, End date	A way of setting the accrual account together with its start and end date, not currently predicted
Account number and its name	This is the account number being predicted based on the textual content of the Item
Cost Center	The predicted Cost Center for the specific account prediction
Transactional info	An empty text box if the User want to add something as a note on the specific account set
Project	The predicted Project for the specific account prediction
Debit and Credit	The interpreted amounts on for the specific account prediction

12.3 Page section

The page section functionality on the bottom of the Item viewer includes the following:

- Leftmost icon: Jump to the first page in the Item
- Second to left icon: Go to the previous page
- Listing of the current page and the total amount of pages in the Item
- Second to right icon: Go to the next page
- Rightmost icon: Jump to the last page in the Item

12.4 Button section

The button section is referring to the bottom left corner of the Item Viewer where there are several types of buttons visible and that changes depending on which Column the Item currently is residing in.

12.4.1 Save button



The Save button functions as such as it enters all the values currently in each respective Field into a stored state such as if the Item Viewer is exited and then re-entered the values presented in each Field is from this stored state. When clicked, any validations available on the Field Data is re-run, thus the State of the Item can change from yellow (not Validated) to green (Validated) and the opposite if the values in the Fields are changed between Save button clicks.

12.4.2 Moving Item forward or backward

The way an Item is moving forward or backward in the Workflow can be manually handled by the Users. Either via a drag-n-drop in the Workflow viewer or in the Item Viewers buttons in the lower left corner of the screen.

A step forward to the following Column in the Workflow is usually represented by a green button with an arrow pointing to the right and the following Column's name on it.



A step backwards, to the previous Column in the Workflow is usually represented by a red button with an arrow pointing to the left and the previous Column's name on it.



12.4.3 Approval: Approve button

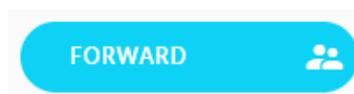
The buttons available in the Approval Columns differ somewhat from the buttons in the non-Approval Column. The principles of moving an Item forward or backward in the Workflow is the same although with different lingo.

A step when an Approver actually Approves the Item hence stating that it's *correct* and moving it forward in the Workflow process is represented by a green button with the text Approve on it.



12.4.4 Approval: Forward button

A step where the Item is moved to another User in the *same* Column in the Workflow is usually represented by a blue button with an icon symbolizing multiple persons.



When moving an Item “vertically” in the Column to another User, placing a comment on the Item is strongly recommended and the User will get a dialogue window where a comment can easily be put in. Comments are further described in section 12.6.

12.4.5 Approval: Reject button

The buttons available in the Approval Columns differ somewhat from the buttons in the non-Approval Column. The principles of moving an Item forward or backward in the Workflow is the same although with different lingo.

A step when an Approver Rejects the Item hence stating that it's *incorrect* and moving it backward in the Workflow process is represented by a red button with the text Reject on it.



When moving an Item backwards, placing a comment on the Item is strongly recommended and the User will get a dialogue window where a comment can easily be put in. Comments are further described in section 12.6.

12.5 Toolbar

The Toolbar is a feature for the User of the user interface visible as a black vertical rectangle located in the viewer section of the screen and on the right side of any Item currently being displayed there. It contains a number of features represented by icons on the Toolbar and are described in the following sections.

12.5.1 Zoom in and out on the Item

The zoom function increases or decreases the size of the Item represented in the viewer section. Each click on either symbol (+) or (-) increase or decrease the size with 25% respectively.



12.5.2 Toggle the extracted fields

This button on the Toolbar lets the user see the Raw Data that the SoftRobot Platform use in order to do its predictions. What the light blue text boxes that show up when clicking on this button contain is exactly what the SoftRobot Platform sees when it looks at the Item and makes its predictions.



12.5.3 Toggle the active extracted fields

This button on the Toolbar highlights the values populated in the Field Data on the left side of the screen, on the Item itself in the viewer section. Visually showing the geographical location of where the predicted value was fetched. Toggling this feature usually helps when you manually are Supervising the Items that get interpreted.



12.5.4 Download Item

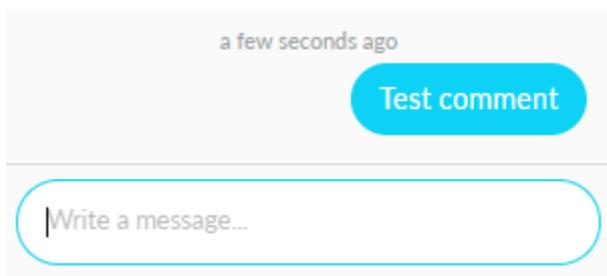
The download feature collects and downloads the current open Item in the Item Viewer together with any eventual metadata that might have been predicted during its time in the Workflow. These two things, the Item itself and any eventual metadata are zipped into an archive and then downloaded directly to the Users default destination for Downloaded files.



12.6 Comments

Commenting on Items is a feature that makes it easy for Users to exchange important metadata to the Items being handled. Especially in communications between an accountant and her client or between Users in an (and between) Approval Column(s).

Any comments added to the Item in the SoftRobot Platform will be delivered to any integrated system in an Export if made possible by the receiving system , as this dialogue can be important if any questions arise on an historic Item that was processed and discussed previously.



13. User administration (Owner)

This section describes the User administration/Management in the Workspace.

If assigned an Owner role the User can enter the User administration by opening up the Settings view and clicking on the Workspace name (or vice versa). The main features available in this Settings view are described in the following sections. One can also mention that there is a search field where a User can filter the current Workspace User list which is quite handy when the User list is very long.

13.1 Invite User



Clicking the Invite User button opens up a dialogue window where new Users can be invited; set an email, set a login method and assign any roles to this new User.

Invite User ×

You can invite a new or existing AIIDA user here. Just fill in the e-mail address, the login method you want them to use, and roles you want the user to have.

E-mail

Login Method

The roles manages which part of your workspace the user can access. Click on a role to move it between "assigned" and "inactive".

Assigned Roles

Inactive Roles

Role	Access Permissions
Owner	
Role	Access Permissions
Member	Skatt
Role	Access Permissions
Member	Personalhandlingar

13.1.1 Email

The first step to invite a new User is to set an email where the login credentials will arrive and to where the SoftRobot Platform can send Notifications when applicable.

13.1.2 Login method

The next step is setting the User login method which can be either BankID or Email & Password. BankID is a Swedish-only two factor authentication method.

13.1.3 Assign role(s)

The next step is choosing what role(s) the new User should have. See section 13.3 for more information about this.

13.2 Modify User

In order to modify an already existing User *the pen icon* in the User list in the Setting view should be clicked.



member@softrobot.io ×

Add and remove user roles here. Keep in mind that if you remove all the roles for a user, the user will no longer have access to your workspace and will need a new invitation. It's thus usually best to add the new roles before removing any existing ones.

Assigned Roles

Role Member	Access Permissions Demobolaget 1 AB
Role Member	Access Permissions Demobolaget 2 AB
Role Approver	Access Permissions Demobolaget 3 AB / Leverantörsfakturor / Attest Demobolaget 3 AB / Kreditfakturor / Attest
Role Approver	Access Permissions Demobolaget 4 AB / Leverantörsfakturor / Attest Demobolaget 4 AB / Kreditfakturor / Attest
Role Approver	Access Permissions Demobolaget 4 AB / Leverantörsfakturor / Attest 2 Demobolaget 4 AB / Kreditfakturor / Attest 2
Role Approver	Access Permissions Demobolaget 5 AB / Leverantörsfakturor / Attest Demobolaget 5 AB / Kreditfakturor / Attest

In order to add a specific Role to a User you click on any of the unassigned Roles that are available, the Role then gets moved up to the Assigned Roles section and by doing that the User now has that Role (as well as any previous ones).

In order to remove a specific Role to a User you perform the opposite manoeuvre and click on any of the Roles listed under Assigned Roles and by doing that the User no longer has that specific Role.

13.3 Roles

The third step in the process to invite a new User is to assign a minimum one Role that is available in the SoftRobot Platform. There's no fixed max number of Roles that can be assigned to a User but a User can only have one identical Role in a Collection at a time (but several different types of Roles Assigned in one Collection). All roles have the ability to Upload Items (see sections 10.3 and 11.3.1) to the Collection they are assigned to.

The possible roles that are assignable to a User are described in more detail below.

13.3.1 Owner

The *Owner* in a Collection can access the Settings thus administer the Users and the Flows. An Owner also has automatic access to all Collections, Workflows and Items in a Workspace.

This Role is meant for Administrators of a Workspace.

13.3.2 Member

The *Member* in a Collection can only access the Collections that they have been assigned and in those Collections all the Workflows and Items.

This Role is meant for the regular Users of a Workspace.

13.3.3 Approver

The *Approver* in a Collection can only access the Approval Columns in the Collections (and Workflows) that they have been assigned to.

This Role is meant for the clients of a SoftRobot Licensee.

13.3.4 Uploader

The *Uploader* in a Collection can only Upload Items to the Collections and Workflows they have been assigned to and won't have any access to any of the Items currently in the SoftRobot Platform.

This Role is meant for the colleagues of the Owners and Members that only are supposed to contribute with uploading of new Items to specific Collections.

14. Mobile app

A Mobile App version of the SoftRobot Platform is available to all Licensees and their clients and facilitates an efficient way of both communicating and receiving new Items from both the colleagues at the Licensee but also their clients.

14.1 Installing the app

The Mobile App of the SoftRobot Platform is available for Android and iOS users. For download of respective versions you enter either Google Play (if Android based phone) or App Store (if iOS based phone) and search for *Aiida* as that's the current name of the Mobile App.

Enter your store credentials and begin to download and install the free-to-download Mobile App version of the SoftRobot Platform.

14.2 Login

The login methods available in the Mobile App are the same as in the Cloud version of the SoftRobot Platform. The User must utilize the login method chosen by the inviter. The User switches between the different login methods by clicking on the "SIGN IN USING BANKID" and the "BACK" button.

14.3 Features

- The first screen that welcomes the User is the "Select workspace" screen, if the User has access (a role) in multiple Workspaces. A User can only be logged in to one Workspace at a time.
- A Workflow view is the next screen that is displayed. In this Workflow view an Owner, Member or Approver will see the Items that they currently have access to in the Approval Columns, if any.
- In the top right corner of the Workspace view there is a hamburger menu where the alternatives to switch between workspaces "Change workspace" and a "Log out" is shown.
- When clicking on an Item displayed in the Workflows listed the Item view will be exposed. The Item can be zoomed in and out by using the pinching manoeuvre with two fingers. For the Approval process itself see section 14.3.2.

14.3.1 Take photos and uploading

The feature to take photos of physical Raw Data in order to upload them into the SoftRobot Platform is reachable from the Workflow viewer by clicking on the small plus sign (+) at the bottom

of the screen. After clicking on this button the camera will be activated and the possibility to take several photos after each other.

After having taken the needed photos of the physical Raw Data the right arrow icon will take you to the second to last step in this process. In this step you can decide whether the photos should be uploaded “As separate documents” or “As a single Document”. If uploaded as separate documents each photo will be uploaded to the SoftRobot Platform as individual Items. If uploaded as a single document all photos will be joined into a single Item which has multiple pages. The then User selects which Collection and, optional, which Workflow the Item should be uploaded to.

14.3.2 Approving and commenting

As noted in section 14.3, when clicking on an Item in the Workflow view that is in the Approval column the Item view will be exposed, aside from the abovementioned practical features in this view the other features in here are the ones related to the Approving Items.

- If the User has a role in the SoftRobot platform that is allowed to Approve or Deny an item (see section 9.1.1. for further reading on this topic) the User sees a red stop icon in the lower left corner and a green “OK” icon in the bottom right. The red stop icon symbolizes a Deny and the green “OK” symbol symbolizes the Approving action.
- Above the red Deny is a blue icon that is used in the cases when you either want to or need to send the item to another Approval User in the Column. If the User doesn’t have any Approving rights or can be the original receiver of the Item this is the only available feature on the Item itself. See the section 9.1. for more info regarding the configuration of the Approving Flows.
- Commenting on an Item is strongly preferred when sending it to other Users within the same Column (when forwarding an Item), this to describe the issue and why you seek help from another User in the same Column. The Mobile App will suggest to the User to add a comment to the Item before sending it to other Users within the same Column. All comments added to the Item are shown when clicking on the top right corner icon, the talking bulb.
- Small text box in the bottom of the Item view stating [which page that is shown currently / [total no. of pages in on the Item].

15. Integrations

The Softrobot Platform has a number of currently active Integrations to other software in order either Import Raw Data or Export Items that have been processed by the service. The current list of active Integrations are:

- [Fortnox](#)

16. Interactive API Documentation

<https://api.aiida.io>