PaperFlow™

Installation and Getting Started Guide

Version 82.0

DIGITECH
SYSTEMS

Digitech Systems, LLC.
8400 E. Crescent Parkway, Suite 500
Greenwood Village, CO 80111
Phone (303) 493-6900 Toll Free (866) 374-3569
www.digitechsystems.com

CONTENTS

This page was intentionally inserted without content.

CHAPTER 1

Introduction

Welcome

Welcome to the *PaperFlow Installation and Getting Started Guide*. This guide will walk you through the installation process and the minimum set up needed to get started with PaperFlow.

This guide is written for IT professionals who are familiar with software installations and configurations. Additionally, users of this installation guide should be familiar with the Microsoft® Windows operating system and basic database administration.

Getting Product Support

Digitech Systems, LLC. takes great pride in providing software that is simple to use, feature-rich, and flexible in architecture and integration capabilities. If you experience any difficulty, please contact us toll free at (877) 374-3569 or direct at (402) 484-7777 to experience our legendary customer service. Additionally, you may contact us at support@digitechsystems.com. Our technical support staff is available to serve you between the hours of 8:00 AM and 6:00 PM Central Time.

Digitech Systems' product features and enhancements are driven by you, our customer. If you have an idea for a future product feature or enhancement, please send an e-mail to dev@digitechsystems.com.

In addition to our legendary technical support staff, we also offer the following resources to help you answer questions and resolve issues.

- **MyDSI** - MyDSI is an interactive tool for all Digitech Systems customers. Log in to MyDSI at http://mydsi.digitechsystems.com to download product updates, license purchased software, view support contract renewals, and check the status of your software support cases and requests.
- **User Forums** - Log in to the User Forums at http://forums.digitechsystems.com to exchange answers and ideas with other users in our moderated community.
- **Knowledge Base** - Log in to search our extensive Knowledge Base at http://k-b.digitechsystems.com for articles on all Digitech Systems products.
- **Documentation** - For documentation describing the use and features of PaperFlow, refer to the *PaperFlow User Guide*. To access the online help and manuals from the application, click the **Help** menu.

System Requirements

This content describes the minimum software and hardware requirements for PaperFlow.

Minimum Software Requirements

The following table shows the minimum software requirements for PaperFlow and its optional components.

Software	Version
Operating Systems (Client)	Windows® 7, 8, 8.1, and 10 (32- and 64-bit operating systems are supported)
Microsoft® .NET Framework	Version 4.7 or later
Windows Installer	Version 4.5 or later

Minimum Hardware Requirements

Most enterprise software is capable of operating on a basic hardware configuration that includes a current processor and 4 GB of memory for desktops and 8 GB of memory for servers. Due to new features and enhancements, PaperFlow requires a minimum of 3 GB of RAM to function. However, each organization and their intended use of PaperFlow are unique. The intended workload, (including the maximum number of users, and the quantity and types of operations performed within a specific periodicity, etc.) coupled with security and redundancy requirements will dictate the hardware requirements for each implementation.

PaperFlow has the distinct capability to scale both up and out. You can configure most of the functions performed by PaperFlow to take advantage of powerful hardware configurations, such as those with many processor cores and hundreds of GB of memory (scaling up). Additionally, PaperFlow can spread its processing requirements across numerous computers (scaling out).

PaperFlow products are designed and tested for specific operating systems, not hardware environments. Numerous customers successfully run PaperFlow in virtual environments, including VMware® and Microsoft® Hyper-V. While this technology has matured over the years, issues have occurred with common software (other than PaperFlow) not operating properly or efficiently because of the virtual environment. In the cases that Digitech Systems' Technical Support has witnessed, the issue was with the virtual environment, not our software.

If our technical support believes that the hardware environment (including virtual environments) is contributing to an operational or performance issue, they may request that you ensure the issue exists in a different (or non-virtual) environment.

If you intend to use a virtual environment for your PaperFlow implementation, carefully consider the implications of running in a shared environment. Remember, you are not just sharing processors and memory. You are also sharing network and disk resources with the other virtual environments on the same hardware.

Supported Scanners

PaperFlow supports more than 300 ISIS-compatible scanners. If you need additional scanner drivers, please contact Digitech Systems' Technical Support at support@digitechsystems.com or by phone at (877) 374-3569. If the driver is available, our support personnel will help you get it.

Alternatively, PaperFlow also supports the use of TWAIN scanners. The use of TWAIN scanners is generally intended for extremely low-volume scanners, as ISIS drivers are available for most scanners on the market.

Terms You Should Know

This section contains definitions for terms that are used throughout the documentation and online help. Knowing this terminology will help you use the product and its documentation more effectively.

Batch

A batch is a collection of documents and their associated index name-value pairs and statistics that are moved as a logical unit of work through a job.

Default Batch Path

The Default Batch Path is the local storage directory where PaperFlow stores all captured images.

Detail Sets

Detail sets expand the capabilities of standard index fields because they define "many-to-one" relationships, which allow multiple sets of field data to reference a single document. In a many-to-one relationship, an index field contains a value that references another field or set of fields that contain unique values.

Document

A document is the equivalent of a file folder within a filing cabinet. A document holds all of the pages for a given set of index values.

Image

An image is a visual representation of a picture or graphic, such as an electronic file with the extension bmp, jpg, or tiff.

Index

An index is a value that users apply to a document for reference and retrieval.

Job

A job is a defined process comprised of one or more job steps through which batches are processed. At a minimum, each job must contain a start step. Each job is unique by name within an entity.

N O T E

All active PaperFlow jobs must match the same version of PaperFlow in which they will be used. When you upgrade PaperFlow to a new version, the application and all active PaperFlow jobs are upgraded to the new version. Therefore, only use jobs that come from the same version of PaperFlow that you are using.

On the Fly Processing

Image processing, barcode reading, and zonal OCR can be executed while you scan documents. You can change the order in which these tasks are executed; however, image processing must be executed first or last.

Page

One or more images (files with extensions bmp, jpg, or tiff) comprise a single page within a document. For example, a page can include the originally captured image and a manipulated version of the image after noise removal.

PaperFlow NOW!

PaperFlow NOW! is installed as a separate application in conjunction with PaperFlow. You can use PaperFlow NOW! to quickly scan and convert images to fulltext PDF, image-only PDF, or multi-page TIFF files. PaperFlow NOW! offers both a standard graphical user interface and a command line interface.

This page was intentionally inserted without content.

CHAPTER 2

Installation Information

Important Installation Prerequisites

Before you install PaperFlow you must:

- Determine what installation configuration you want to use.

IMPORTANT

The following items impact the performance and functionality of PaperFlow. Read this information before installing PaperFlow.

- If real-time anti-virus software will scan the same files to which PaperFlow will write information, the overall performance of PaperFlow may be adversely affected.

- PaperFlow must be installed using administrative privileges.

Using the Installation and Setup Wizard

The installation and setup of PaperFlow requires that you follow the instructions on every screen. You can click the **Back** or **Next** buttons to move backward and forward through the screens. You can click the **Cancel** button to exit and close the Installation or Setup Wizard.

Installing PaperFlow

Before installing PaperFlow, review and complete the "Important Installation Prerequisites" above. The following instructions describe a full installation of PaperFlow.

To install PaperFlow

1. From the PaperFlow installation DVD, open the **PaperFlow.exe** file.

   After a few moments, the **Welcome to the InstallShield Wizard for PaperFlow** dialog box appears.

NOTE

If Microsoft Report Viewer version 2012 is not installed, an installation window appears. This version must be installed before you can view any PaperFlow reports.
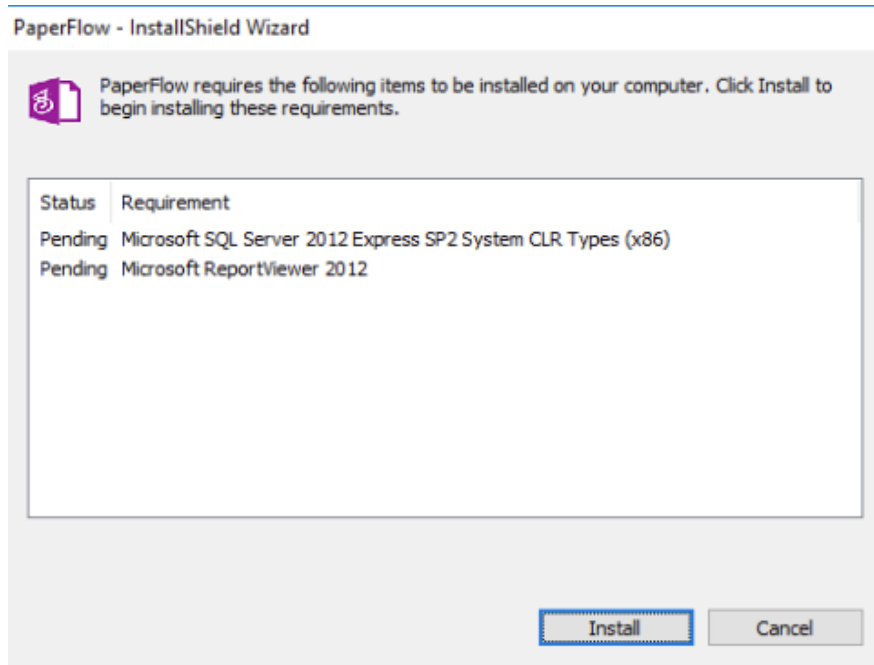
Follow the installation prompts to install the Microsoft SQL Server extension and Microsoft Report Viewer 2012, and then continue with the PaperFlow installation.

2. Click **Next** to open the **License Agreement** dialog box.

3. If you accept the terms of the End-User License Agreement, click **I accept the terms in the license agreement**. If you decline the terms, the installation will terminate.

N O T E

To print a hard copy of the End-User License Agreement, click **Print**.

---

4. Click **Next** to open the **Customer Information** dialog box, and type the following information.

   - Type the user name in the **User Name** box.

   - Type the user organization in the **Organization** box.

   - Click **Anyone who uses this computer (all users)** to allow any user who logs into the computer access to PaperFlow.

   - Click **Only for me (owner)** to allow only the user name of the person installing the application, access to PaperFlow.
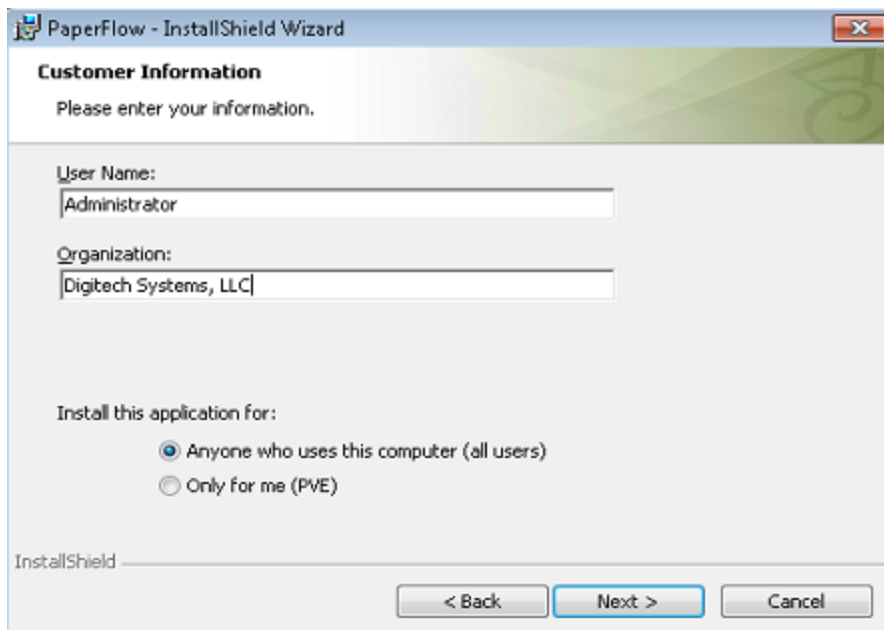
5. Click **Next** to open the **Setup Type** dialog box.
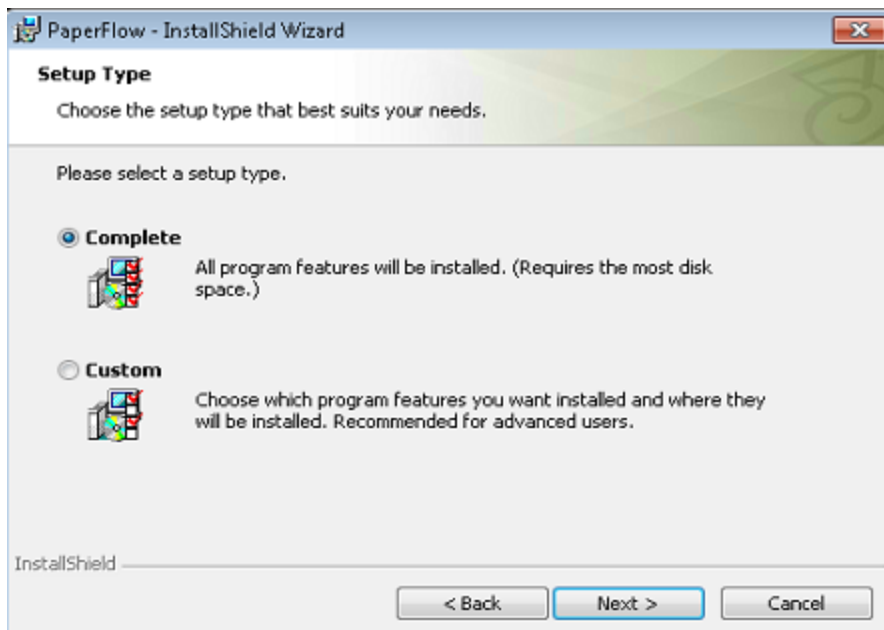
6. Click one of the listed setup types. A description of each setup type follows, but this document describes the steps only for the **Complete** setup type.

- Selecting **Complete** installs all components of PaperFlow, including PaperFlow NOW!

- Selecting **Custom** (recommended only for advanced users) lets you select the individual components to install. When you select this option, and then click **Next**, the **Custom Setup**

dialog box appears. In this dialog box, you can select a component, and its description and memory requirements appear in the **Feature Description** area on the right.

![note icon] **N O T E**

When performing a custom installation, you can change the default installation location for the selected component by clicking **Change**, and then selecting a new destination folder.

To leave a component out of the installation, click the arrow to the left of the component, and then select **This feature will not be available**.

Click the arrow to the left of the component to access the following options:

This feature will be installed on local hard drive.

**This feature, and all subfeatures, will be installed on local hard drive.**

Both of these options will install the necessary components for a custom installation on the local hard drive.

---

6. After selecting **Complete**, click **Next** to open the **Ready to Install the Program** dialog box.
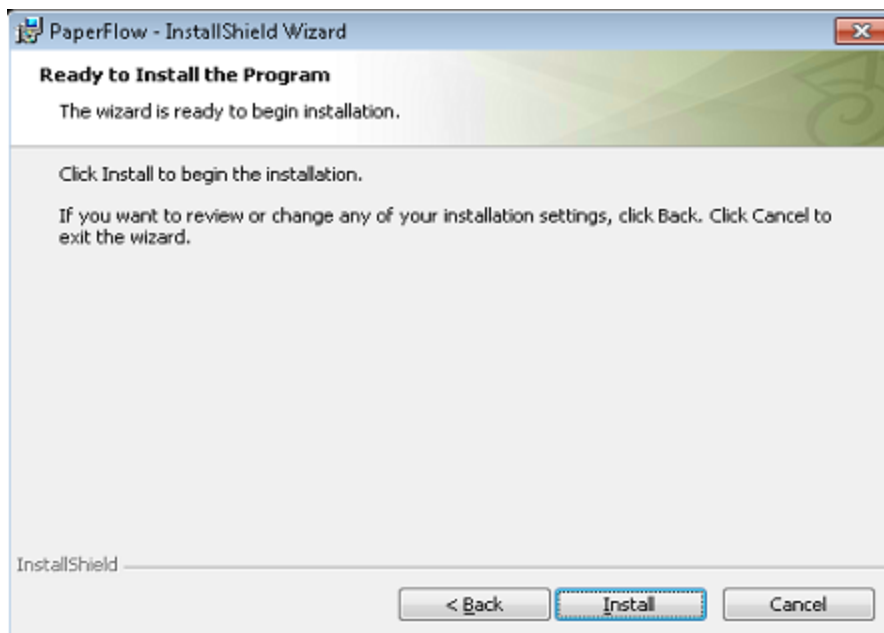
7. Click **Install**. A progress bar appears, and then the **InstallShield Wizard Completed** dialog box appears.
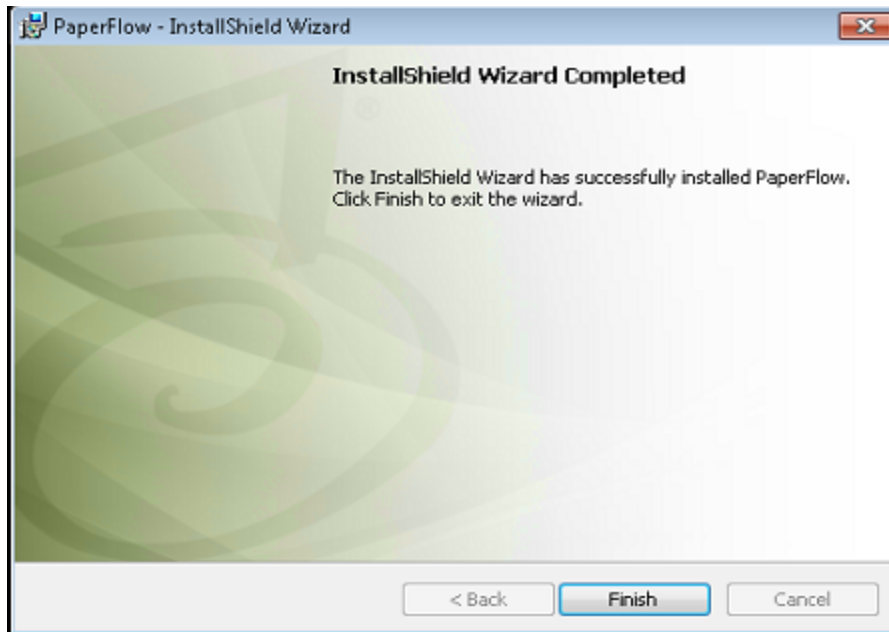
8. Click **Finish** to complete the installation process.

Uninstalling PaperFlow

You can use this procedure to remove PaperFlow and PaperFlow NOW! from your computer. However, user-generated data, such as license data, processed files, and images will remain intact.

To uninstall PaperFlow

1. From the **Start** menu, open the **Windows Control Panel**.

2. Select **Programs and Features**.

3. Select **PaperFlow** from the list, and then click **Uninstall**.

This page was intentionally inserted without content.

CHAPTER 3

Getting Started

Licensing PaperFlow

Before you can log in to PaperFlow, you must add a license. PaperFlow provides unlimited use licenses, and click licenses. Click licenses contain information regarding the number of clicks you have purchased, the number of clicks used, and the number of clicks remaining. Clicks are consumed when you process, scan, or import a page or image. The following license types are available as either unlimited use licenses, or click licenses.

- PaperFlow Pro license provides all PaperFlow and PaperFlow NOW! functionality, including barcode scanning and OCR processing.

- PaperFlow Lite License provides all PaperFlow and PaperFlow NOW! functionality, but does not include barcode scanning or OCR processing.

- PaperFlow Choice (OCR) license provides all PaperFlow and PaperFlow NOW! functionality and OCR processing.

- PaperFlow Choice (Barcode) license provides all PaperFlow and PaperFlow NOW! functionality and barcode scanning.

Demonstration License

A demonstration license is also available for PaperFlow. The Watermark Demo license includes all PaperFlow and PaperFlow NOW! features and functionality. Please contact Digitech Systems' Technical Support to get the appropriate demonstration license key.

The Watermark Demo license writes a watermark on all images that are scanned or imported into PaperFlow for the entire duration of the batch process.
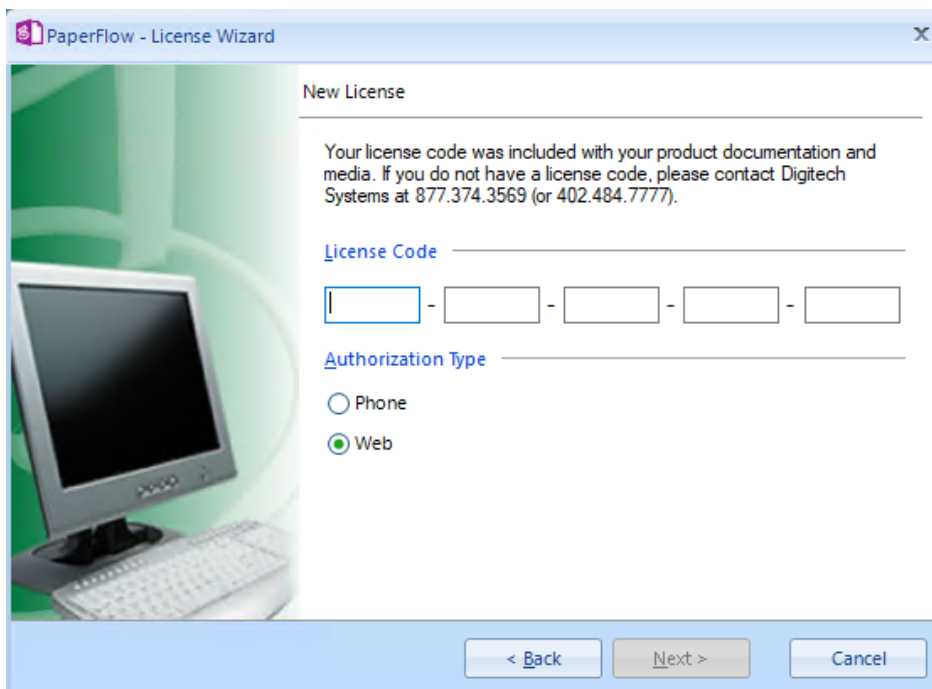
⚠ **C A U T I O N**

Removing the watermark is a violation of the PaperFlow End User License Agreement (EULA).

To add a license

1. After you have installed PaperFlow, double-click the PaperFlow icon on your desktop to open the **PaperFlow - License Wizard**.

2. Click **Next** to open the **New License** dialog box.

3. In the **License Code**.boxes, type the license code that was included with your product documentation and media.

4. Do one of the following:

   • Click **Web Authorization** to get the license key online.

   • Click **Phone Authorization**, and then follow the instructions on the **Obtain Authorization Code** dialog box.

N O T E

You must provide the serial number and identifier before the license key will be given to you.

---

5. In the **Obtain Authorization Code** dialog box, type the authorization code.

6. Click **Next**, and then click **Finish** to exit the license wizard and start PaperFlow.

N O T E

Clicking **Next** in the **Obtain Authorization Code** dialog box activates the license.

Creating Jobs and Batches

After you have added and activated a PaperFlow license, you must create a new job and batch from which you can scan, import, and index documents. A job is a process comprised of one or more manual or automated tasks (such as scanning, indexing, and exporting) through which batches are processed. A batch is a collection of documents and their associated index name-value pairs that are moved as a logical unit of work through a job. Each batch has a unique name. In the Welcome page, the **New Batch Wizard** will guide you through the creation of new jobs and batches.

This content describes how to create a new batch from the Welcome window. Alternatively, you can open the **New Batch Wizard** by clicking the **PaperFlow** button, and then clicking **New Batch**.
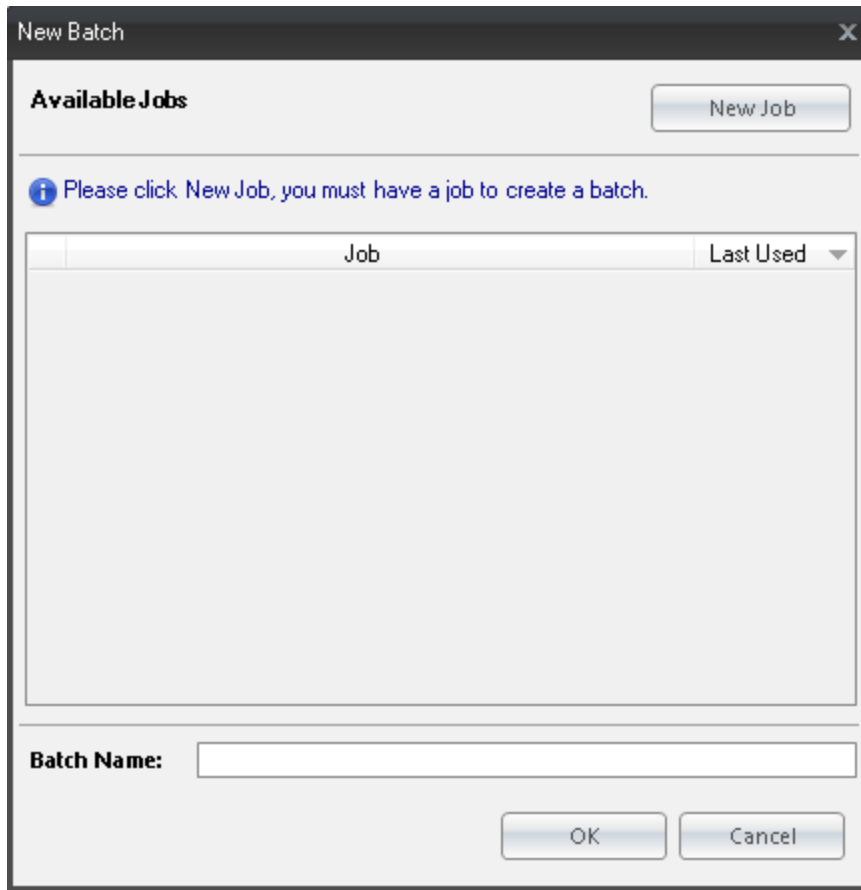

N O T E

All active PaperFlow jobs must match the same version of PaperFlow in which they will be used. When you upgrade PaperFlow to a new version, the application and all active PaperFlow jobs are upgraded to the new version. Therefore, only use jobs that come from the same version of PaperFlow that you are using.

To create a new job

1. On the welcome screen, click **New Batch** to open the **New Batch** dialog box.
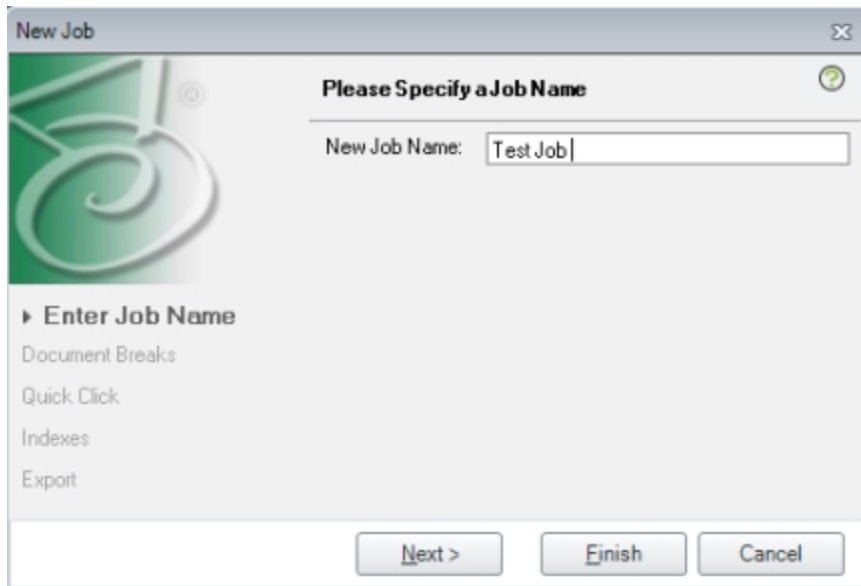

2. Click **New Job**. In the **New Job Name** box, type the name of the job, and then do one of the following:

   - Click **Finish** to create the new job.

   - Click **Next** to open the **Document Breaks** dialog box.

   N O T E

   At any time, you can click **Back** to return to the previous dialog box.

---

3. In the **Document Breaks** dialog box, specify how you want a document break identified. Select from the following options and then click **Next** to open the **Quick Click Indexing** dialog box, or click **Finish**.

- **None** - No document breaks will exist in the job.

- **Blank Page** - A document break is inserted when a blank page of the specified size is recognized. In the **Page Size (KBytes)** box, type the size a page must be to initiate a document break. Select **Delete Break Page** if you want the blank page deleted after the job is run.

- **Number of Pages** - A document break is inserted after a specified number of scanned pages. In the **Number of Pages** box, type the number of scanned pages, after which you want a document break inserted.

- **Barcode** - A document break is inserted wherever a barcode is scanned. Click **Next** to configure the barcode zone. See "To draw a zone" on page 32 for instructions on configuring a barcode.

- **OCR** - A document break is inserted wherever specified text is found. Click **Next** to configure

the OCR zone. See "To draw a zone" on page 32 for instructions on configuring a barcode.
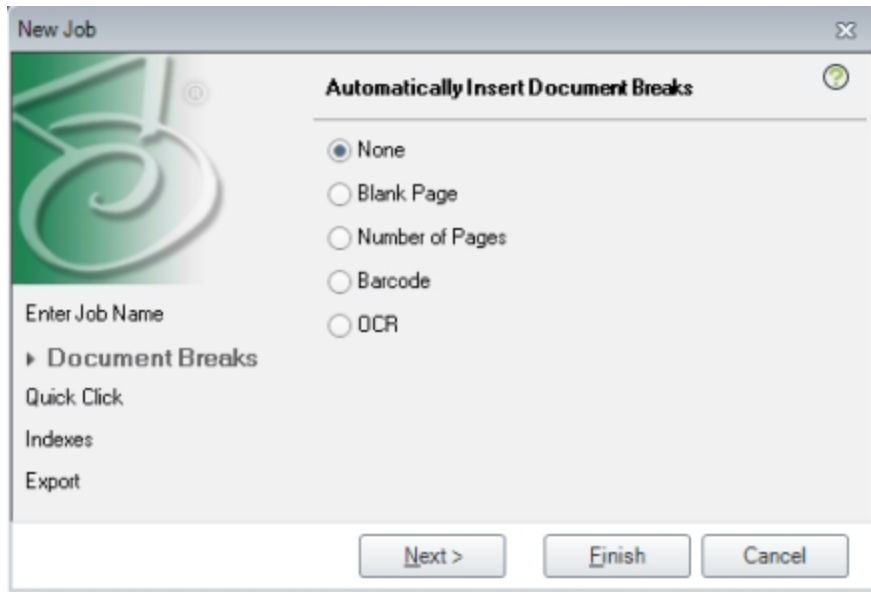

4. In the **Quick Click Indexing** dialog box, select **Enable Quick Click Indexing** to turn on Quick Click Indexing. Select one of the following options, and then click **Next** to open the **Specify Job Index Fields** dialog box, or click **Finish**.

    *   **Default Configuration** - Select this option if you want the focus to automatically move to the next index field after a word is selected for the current index field.

    *   **Advanced Configuration** - Select this option if you want to specify when the Quick Click engine will stop on an index field. You can configure this in the **Job Indexes** dialog box.

    *   **Page Range** - Select this option to limit Quick Click data to certain pages. Do one of the following:

        *   Type the page number for which you want to generate Quick Click data.

        *   Type the page range for which you want to generate Quick Click data.

        *   Leave blank to generate Quick Click data for all pages.
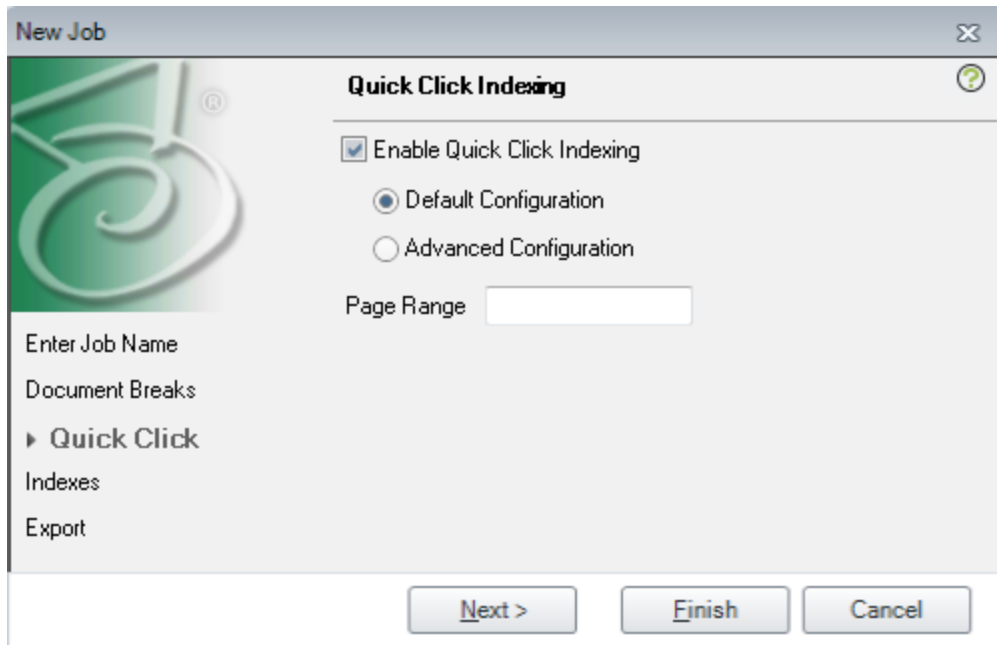
5. In the **Specify Job Index Fields** dialog box, you can add, edit, and remove indexes and detail fields. You can also configure quick click indexing.
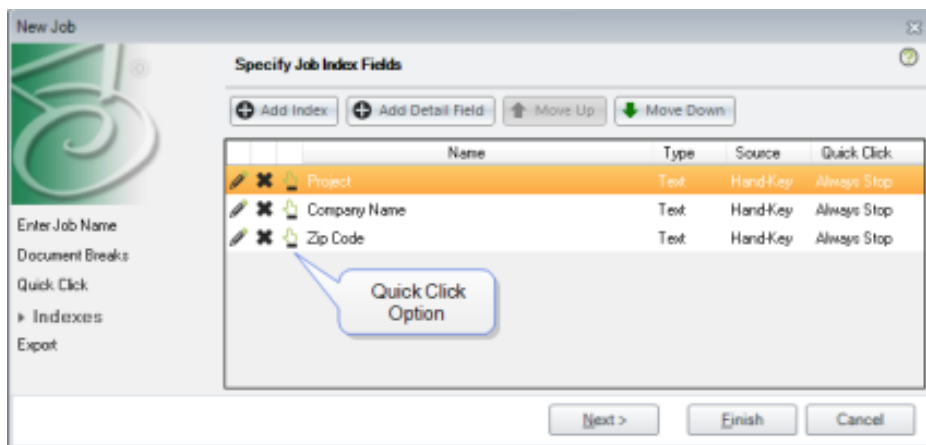
6. Click **Add Index** to open the **Add New Index Field** dialog box.
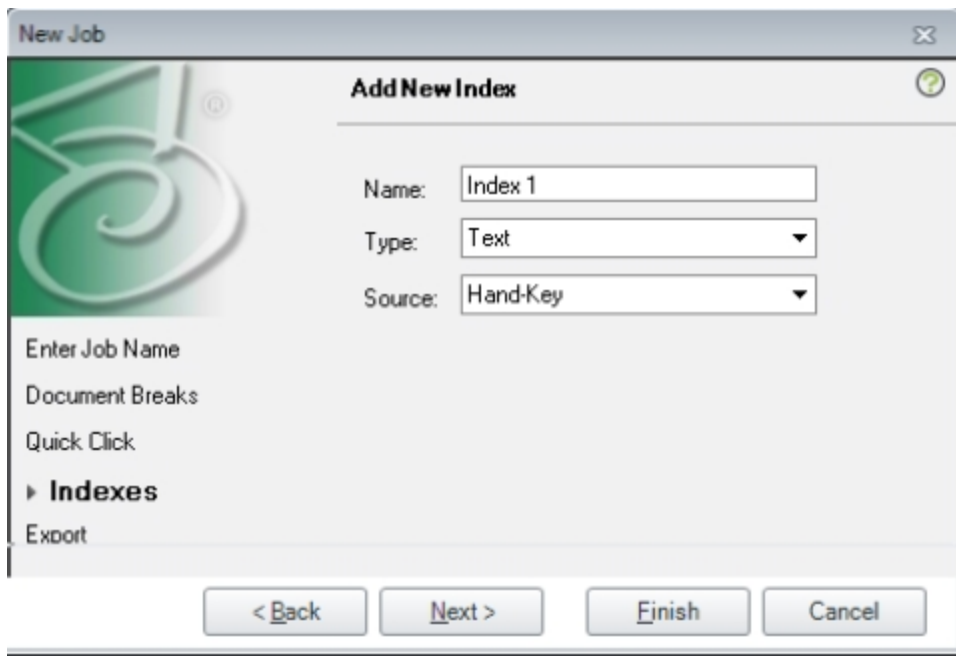
7. Type the name of the index in the **Name** box.

8. Click **Type**, and then click the down arrow to select one of the following options:

   - **Boolean** - Selecting this option causes the index to store Boolean values such as yes/no, on/off, and true/false. When you select this option and click **Next**, you can specify a format for the index.

   - **Currency** - Selecting this option causes the index to store currency (monetary) values. When you select this option, the Index Type property is automatically set to format the index value like this: $1,234.56.

   - **Date** - Selecting this option causes the index to store date/time values ranging from 12:00:00 midnight, January 1, 1753, through, 11:59;59, December 31, 9999. When you select this option and click **Next**, you can configure the date/time format. This index type supports date range searches.

   - **Double Number** - Selecting this option causes the index to store numbers that require decimal places, or exceed the limitations of a Number field. When you select this option and click **Next**, you can configure the double number index format.

   - **Long Text** - Selecting this option causes the index to store textual data that exceeds 255 characters (up to approximately 64,000 characters in total). Because this type of field does not use database indexes, consider using the **Text(900)** field type if possible. Using the **Long Text** field type in projects that contain huge volumes of documents can degrade search performance.

   - **Number** - Selecting this option causes the index to store whole-number values between 2,147,483,648 and 2,147,483,647. This index type supports hyphens or dashes at the beginning of the number to indicate a negative value, but it does not support hyphens or dashes

within the number, such as dashes within a social security number (555-55-5555). This index excludes these dashes from the number.

- **Text** - Selecting this option causes the index to store textual data up to 255 characters in length. This type of index is the most common.

- **Text(900)** - Selecting this option causes the index to store textual data up to 900 characters in length.

> **N O T E**
>
> Migration databases support only 255 characters, so any data that has been assigned this field type will be truncated during migration.


> **N O T E**
>
> Microsoft® Server™ supports maximum row sizes of 8060 characters. If the length of the combined index field (excluding long-text fields) data for a document exceeds 8060 characters, SQL Server cannot support it, and the system displays an alert.
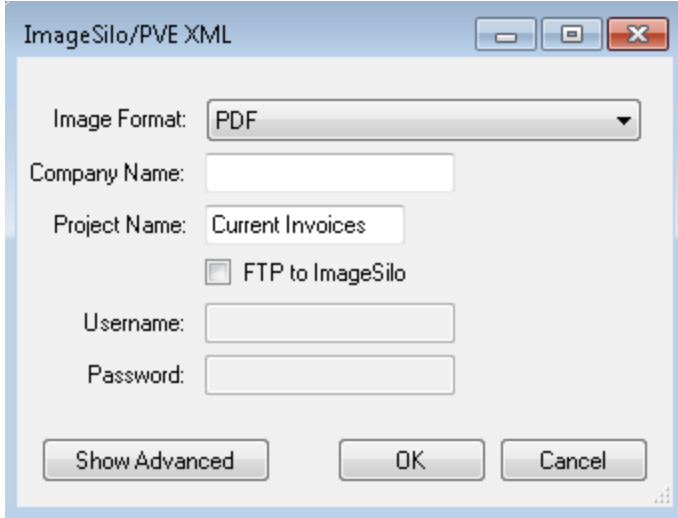
---

9. Click **Source**, and then click the down arrow to select one of the following options:

- **Hand-Key** - Select this option if you want to enter index values manually.

- **Barcode** - Select this option if you want to capture index values from a barcode in the document. If you select this option and then click **Next**, you can then configure the barcode zone. See "To draw a zone" on page 32 for more information on drawing zones.

- **OCR** - Select this option if you want to capture index values from an OCR zone in the document. If you select this option and then click **Next**, you can then configure the OCR zone. See "To draw a zone" on page 32 for more information on drawing zones.

10. Repeat steps 6 through 9 to add as many index fields as you need.

11. Optionally, click **Add Detail Field** to open the **Add Detail Field** dialog box. Detail fields are configured the same as index fields. Follow steps 6 through 9 to configure as many detail fields as you need.

12. If you selected **Advanced Quick Click** in the **Quick Click Indexing** dialog box, the Quick Click button appears in the index row. You can configure Quick Click indexing for each index field. Click **Advanced Quick Click Indexing Configuration**, select one of the following, and then click **Next.**

- **Always Stop** - Select this option if you want PaperFlow to stop on this index field whether it is populated or not.

- **Stop If Empty** - Select this option if you want PaperFlow to stop on this index field only when it is empty.

- **Stop If Populated** - Select this option if you want PaperFlow to stop on this index field only when it is populated.

- **Never Stop** - Select this option if you want PaperFlow to bypass this index field.

13. To edit an index, select the field and then do one of the following:

    * Click **Edit Index** to return to the **Add Index** dialog box.
    * Click **Delete Index** to remove the index field.

14. To edit a detail field, select the field and then do one of the following:

    * Click **Edit Detail Field** to return to the **Add Detail Field** dialog box.
    * Click **Delete Detail Field** to remove the detail field.

15. Once you have finished adding and configuring index and detail fields, click **Next** to open the **Configure Exports** dialog box, or click **Finish**.
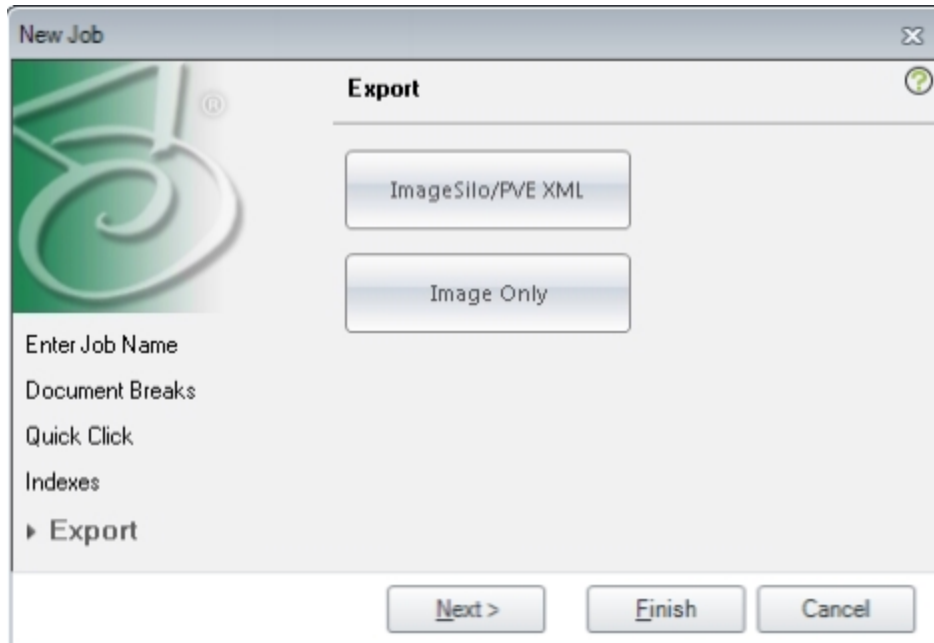

16. In the **Configure Exports Dialog** box, you can select the export type to which this job will be associated. Do one of the following, and then click **OK**.

● Click **ImageSilo/PVE XML** and configure the following settings.

- On the **Image Format** list, select one of the following formats.

  - **PDF** - Identifies the source files as PDF files.
  - **Original** - Identifies the source files as their original format.
  - **Tiff Single page** - Identifies the source files as single page TIFF files.
  - **Tiff Multiple pages** - Identifies the source files as multi-page TIFF files.

- **Company Name** - Optionally, type a company name.
- **Project Name** - Optionally, type a project name.
- **FTP to Image Silo** - Select this option to send the images to Image Silo, and then complete the following:

  - **Username** - Type the username associated with the Image Silo
    FTP account.
  - **Password** - Type the password associated with the Image Silo
    FTP account.

- **Show Advanced** - Select this option to use the advanced export features. For more information, see the Export Definitions section in Chapter 7 of the *PaperFlow User Guide*.

- Click **Image Only** and configure the following settings.
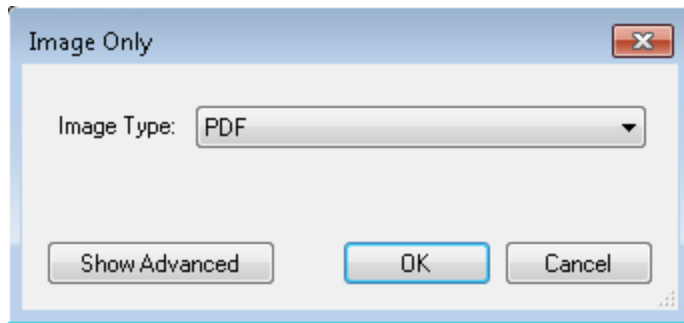
Image Only			x
Image Type:	PDF		▼
Show Advanced		OK	Cancel

- - On the **Image Format** list, select one of the following formats.

    - - **PDF** - Identifies the source files as PDF files.
    - - **Original** - Identifies the source files as their original format.
    - - **Tiff Single page** - Identifies the source files as single page TIFF files.
    - - **Tiff Multiple pages** - Identifies the source files as multi-page TIFF files.

  - - **Show Advanced** - Select this option to use the advanced export features. For more information, see the Export Definitions section in Chapter 7 of the *PaperFlow User Guide*.

17. Click **Finish** to save your configuration.

Drawing Zones

You can use zones to extract OCR data, or to read information from barcodes. You can then configure these zones to create page breaks, or populate index and detail fields.

To draw a zone

The following procedure is the same for drawing barcodes zones and OCR zones.

1. From the **Automatically Insert Documents Breaks** dialog box, or the **Source** list on the **Add New Index Field** dialog box, Select **Barcode**, or **OCR** and then click **Next** to open the **Please Select Image** window.
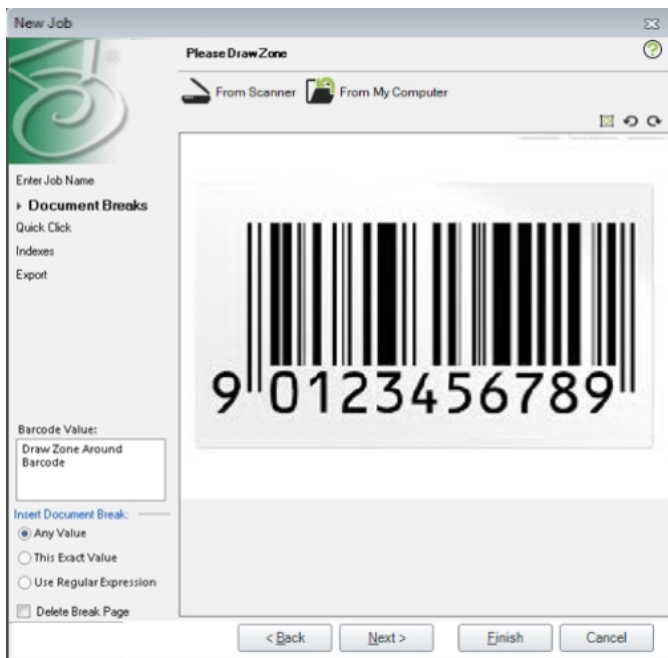
2. Select the image you want to use to configure the zone using one of the following methods.

   - Drag and drop the image onto the workspace.

   - Click **From My Computer** and then browse to the image you want to use, and then click **Open**.

   - Click **From Scanner** to scan an image and then click **OK**. For more information on configuring a scanner, see the Scanner Settings section in Chapter 3 of the *PaperFlow Users Guide*.

3. Place the cursor on a corner of the barcode or the zone you want to draw, press the left mouse button, and draw a zone. The barcode or OCR value appears on the left.

4. (For document breaks only) Select one of the following **Insert Document Break** options.

   - **Any Value** - The system will use any value within the selected region to perform a document break.

   - **This Exact Value** - A document break will only be initiated when this specific value is found in the barcode or OCR zone.

- **Use Regular Expression** - Select this option to use a Regular Expression for the document break.

5. (For document breaks only) Select **Delete Break Page** to delete the break page after the document is scanned.

6. Click **Next** when you are finished configuring the zone.

PaperFlow NOW!

To launch PaperFlow NOW!, double-click the PaperFlow NOW! icon located on your desktop. The PaperFlow NOW! page will appear, where you can configure the scanner, scan pages, and output images. For more information on the settings and operations available in the PaperFlow NOW! application, press the F1 key, or see Chapter 8 in the accompanying *PaperFlow User Guide*.

N O T E

PaperFlow NOW! and PaperFlow cannot be run simultaneously on the same machine.