

# PaperVision<sup>®</sup> Tools Installation and Getting<sup>®</sup> Started Guide

Version 84.0



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# CHAPTER 1

## Introduction

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# Welcome

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

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 Microsoft Office products.

## System Requirements

PaperVision Tools lets you add documents to PaperVision Enterprise directly from certain Microsoft Office products. PaperVision Tools supports adding documents from Microsoft Word, Excel, PowerPoint, and Outlook.



### **I M P O R T A N T**

This version of PaperVision Tools supports only Microsoft Office version 2013 or 2016. It does not support Microsoft Office 365. If you are using earlier versions of Microsoft Office (2007 or 2010), use version 77 of PaperVision Tools, as installing this version will remove the toolbar for PaperVision Tools from the Microsoft Office products.

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The following table shows the minimum software requirements for PaperVision Tools.

| Software          | Version              |
|-------------------|----------------------|
| Operating Systems | Windows® 7 or later  |
| Microsoft® Office | Version 2013 or 2016 |

# Get Product Support

Digitech Systems 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](mailto: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](mailto: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://kb.digitechsystems.com> for articles on all Digitech Systems products.
- **Documentation** - You can access the *PaperVision Tools Installation and Getting Started Guide* in the software by clicking **Options**, then **Help**, and then **User Guide**. For documentation describing the use and features of PaperVision Enterprise, refer to the *PaperVision Enterprise Administration Guide* and the *PaperVision Enterprise User Guide*. To access the online help and manuals from the PaperVision Enterprise software, click the **Help** menu.

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# CHAPTER 2

## PaperVision Tools Installation

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## Installation and Configuration Wizard

The installation and setup of PaperVision Tools 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. Additionally, the **Skip** button is available on certain screens if specific components have already been configured in previous versions of the software.

## Install PaperVision Tools

Before you install PaperVision Tools on your computer you must be designated as an administrator to install any of the PaperVision Tools setup types.

### To install PaperVision Tools



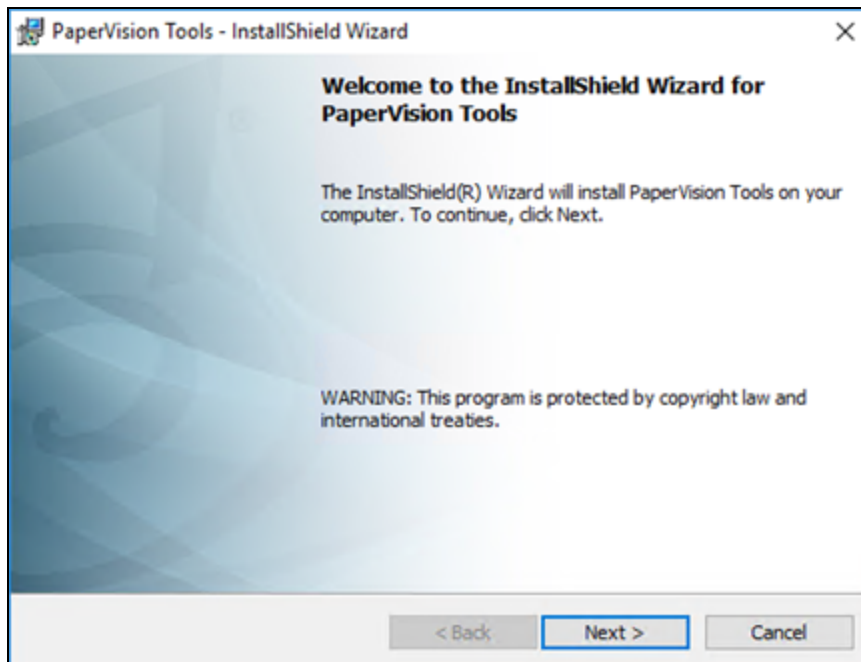
#### I M P O R T A N T

Install PaperVision Tools using administrative privileges.

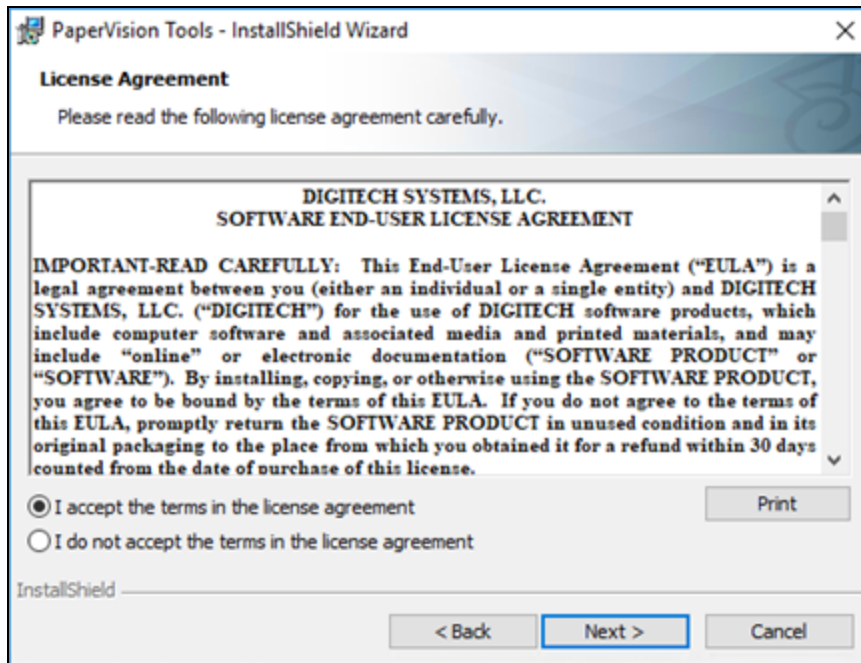
---

1. Run **PaperVision Tools.exe**.

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



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



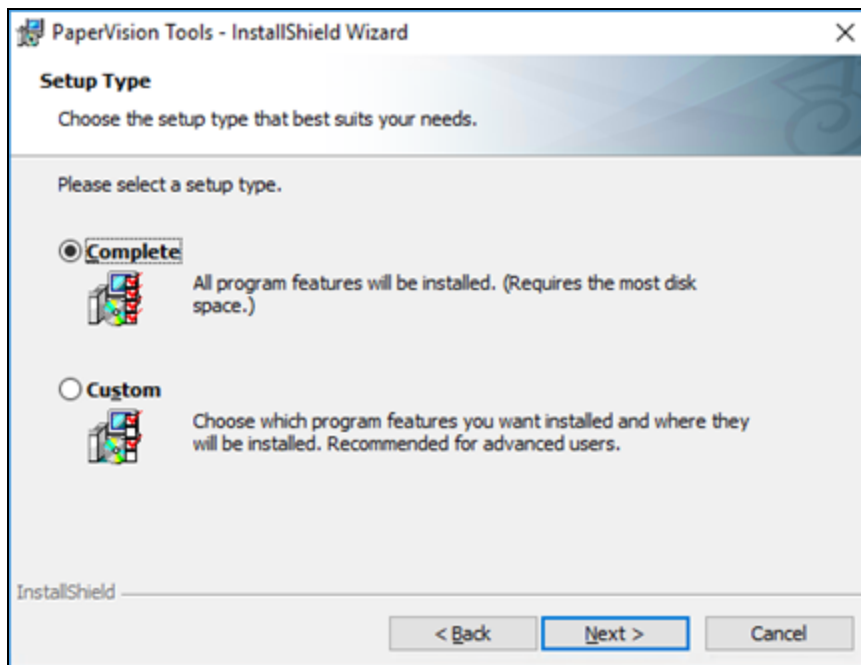
3. To accept the terms of the End-User License Agreement, select **I accept the terms in the license agreement**. If you decline the terms, the installation will terminate.

**N O T E**

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

---

- Click **Next** to open the **Setup Type** dialog box.



- 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 **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.



**N O T E**

When performing a custom installation, you cannot change the default installation location for the **OfficeTool** and **OutlookTool** components, as they will not function properly.

You can change the default installation location for the other components 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:

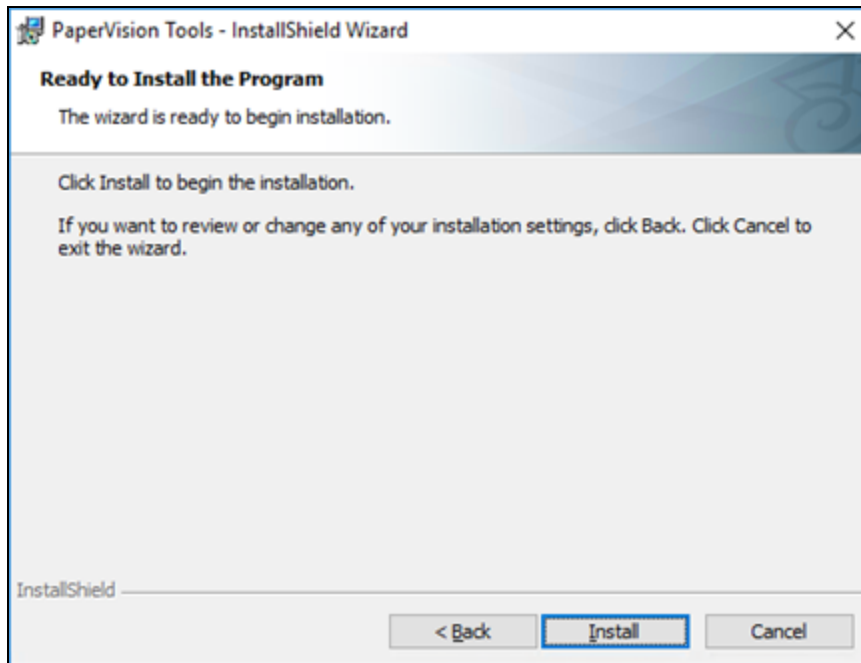
**This feature will be installed on local hard drive.**

**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.

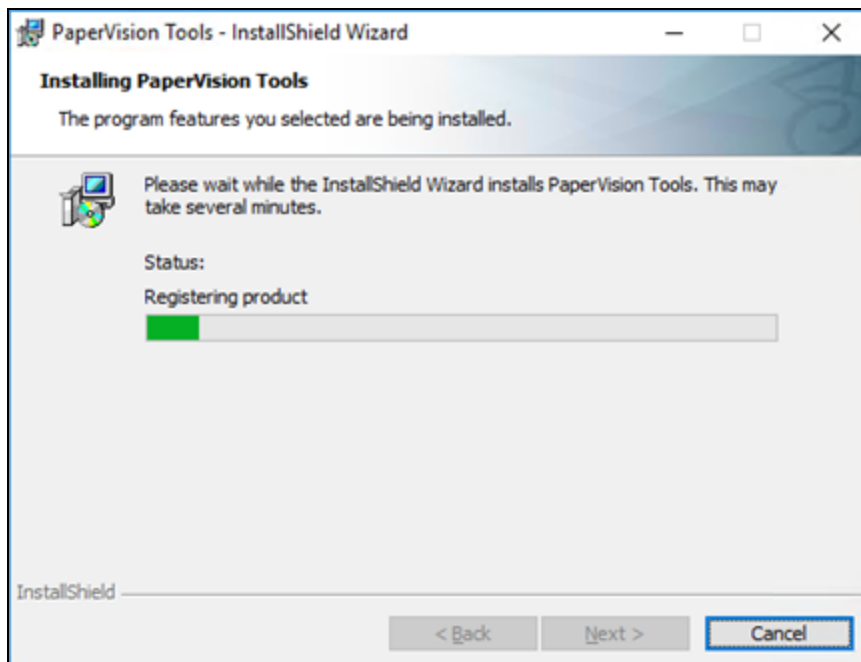
---

6. After selecting **Complete**, click **Next** to open the **Ready to Install the Program** dialog box.

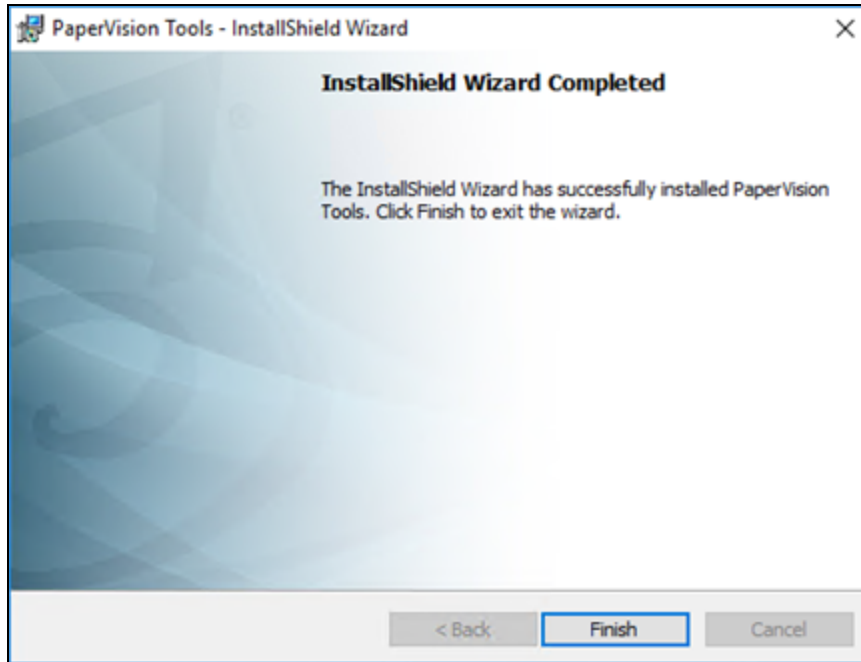


7. Click **Install**.

A progress bar appears on the **Installing PaperVision Tools** dialog box.



After PaperVision Tools is successfully installed, the **InstallShield Wizard Completed** screen appears.



8. Click **Finish**.

## Uninstall PaperVision Tools

The following procedure removes PaperVision Tools from the system. However, user-generated data, including processed files, databases, images, and so on, will remain intact.

### To uninstall PaperVision Tools

1. Open the Windows **Control Panel**.
2. Under **Programs**, click **Uninstall a program**.
3. From the list of programs, select **PaperVision Tools**, and then click **Uninstall**.

# CHAPTER 3

## Get Started in PaperVision Tools

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## Configure Options

After PaperVision Tools has been successfully installed, you must specify connection and appearance options from one of the supported Microsoft® Office products. PaperVision Tools supports Microsoft Word, Excel, PowerPoint, and Outlook.

### To configure options

1. In the supported Microsoft Office product, (for example, Word) click the **Add-ins** ribbon.
2. In the **Custom Toolbars** group, click **Options**.
3. In the **Connection** area, in the **Server URL** box, type or select the address for the PaperVision Enterprise server.
4. If you connect through the Authentication Gateway, select **Use Authentication Gateway**, and then in the **Gateway URL** box, type or select the Authentication Gateway address.
5. (Optional) To ensure that your connection is working, click **Test Connection**.
6. In the **Login Screen** area, select or clear the **Display Entity ID** check box to specify whether the login screen displays the entity ID.



#### NOTE

The **Display Entity ID** check box is selected by default. When connecting to ImageSilo, leave this option selected.

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7. In the **Add Documents Screen** area, you can set the following options:
  - **Remember Last Used Project** - When selected, each time a document is added, it will go to the project that was last selected.
  - **Logout After Adding Documents** - When selected, after a document is added, the user is automatically logged out. Each time a user logs in to PaperVision Tools, it consumes a PaperVision Enterprise user license. If this option is cleared, unless you log out on the **Add-Ins** ribbon, the user license is still held even after you close the Microsoft Office product. The PaperVision Enterprise user license remains in use until either PaperVision Enterprise runs the **Session/Grant Cleanup** operation or the specified **Max Session Idle Time** setting is reached, and the user is automatically logged out. (Both of these options are configured in the PaperVision Enterprise Administration Console under **System Settings**.)
8. In the **Display** list, select an option to specify how the PaperVision Tools menu and toolbar appear in Microsoft Office products.
9. In the **Button Style** list, select an option to specify the appearance of buttons on the toolbar.
10. Click **Save**.



## Log In and Out

You must log in to PaperVision Tools for menu commands and toolbar buttons to become available for use. When you log in, the system authenticates your access based on the user name and password you provide. If your site uses multiple entities, you will also need to provide the correct entity ID.

Before you can log in to PaperVision Tools, you must get the following items from your administrator:

- Your user name and password
- Your entity ID (if required)



### N O T E

Each time you log in to PaperVision Tools, it consumes a PaperVision Enterprise user license. If you do not log out, then the user license is held even after you close the Microsoft Office product. You can set your configuration to automatically log you out after adding documents. (See "Configure Options" on the previous page for instructions.)

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### To log in

1. In the Microsoft Office product, click the **Add-ins** tab.
2. In the **Custom Toolbars** group, click **Login/Logout**.
3. If necessary, in the **Entity ID** box, type the ID number for the entity.
4. In the **User Name** box, type your user name.
5. In the **Password** box, type your password.
6. In the **Caching of Login Credentials** area, select an option to specify how your login credentials are handled for future sessions.
7. Click **OK**.

When you are logged in, a red circle appears on the **Login/Logout** command.

### To log out

1. In the Microsoft Office product, click the **Add-ins** tab.
2. In the **Custom Toolbars** group, click **Login/Logout**.
3. Click **Yes** to confirm the log out operation.

## Add Documents

PaperVision Tools lets you add documents to PaperVision Enterprise directly from Microsoft® Word, Excel, PowerPoint, and Outlook. In addition, you can add documents, using a drag-and-drop operation, and by right clicking on a file to access a menu command. Each method is described in the following procedures.



### NOTE

Before you can add documents, you must be logged in to PaperVision Tools. See "To log in" on the previous page for instructions.

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### To add documents from a Microsoft Office product

1. In the supported Microsoft Office product, click the **Add-ins** tab.
2. In the **Custom Toolbars** group, click **Add**.
3. In the **Project** list, select the project where you want the document added.
4. In the **Document Index Fields** area, in the **Index Value** column, type a value for the corresponding index.
5. To place the document in a folder under the project, click the ellipses button next to the **Folder** box, and then in the **Choose Folder** dialog box, do one of the following:
  - In the **Folder** area, click the folder and then click **OK**.
  - To add a folder, click **New Folder**, type a name for the folder, and then click **OK**.
6. To close, and then delete the local copy of the document after it is added, select **Close and Delete Local Copy**.
7. Click **Save**.

### To add documents via a drag-and-drop operation

1. Select the document(s) to add. (To select multiple documents, hold down the Ctrl key.)
2. Using a drag-and-drop operation, place the document(s) on the **Send to PaperVision** icon.
3. When the **Add Documents** dialog box appears, in the **Project** list, select the project where you want the document(s) added.
4. In the **Document Index Fields** area, in the **Index Value** column, type a value for the corresponding index.



### NOTE

If you add multiple documents, all of them will be indexed with the same information.

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5. To place the document(s) in a folder under the project, click the ellipses button next to the **Folder** box, and then in the **Choose Folder** dialog box, do one of the following:
  - In the **Folder** area, click the folder, and then click **OK**.
  - To add a folder, click **New Folder**, type a name for the folder, and then click **OK**.

6. To delete the local copy of the document after it is added, select **Delete Local Copy**.
7. Click **Save**.

#### To add documents by right-clicking

1. Right-click the document you want to add.
2. Point to **Send to**, and then click **PaperVision Enterprise**.
3. When the **Add Documents** dialog box appears, in the **Project** list, select the project where you want the document added.
4. In the **Document Index Fields** area, in the **Index Value** column, type a value for the corresponding index.
5. To place the document in a folder under the project, click the ellipses button next to the **Folder** box, and then in the **Choose Folder** dialog box, do one of the following:
  - In the **Folder** area, click the folder, and then click **OK**.
  - To add a folder, click **New Folder**, type a name for the folder, and then click **OK**.
6. To delete the local copy of the document after it is added to, select **Delete Local Copy**.
7. Click **Save**.

## Version Control Options

If your administrator has assigned you permission to do so, from PaperVision Enterprise you can open documents in their native applications. After the document is checked out, it automatically opens in the application where it was created. If the document was created in a Microsoft Office product, when it opens, the **Check In**, **Undo Check Out**, and **View Checked Out** commands on the **Add-ins** tab are available. The following procedures describe how to use each command.

#### To check in documents

1. In the Microsoft Office product, click the **Add-ins** ribbon.
2. In the group, click **Check In**.
3. In the **Changes Made** area, select one of the following:
  - **New Version (Major)** - Select this option to increment the version by a whole number. For example, version 1.002 becomes version 2.000. Selecting this option indicates that substantial changes occurred.
  - **New Revision (Minor)** - Select this option to increment the minor version of the document. For example, version 1.002 becomes version 1.003. Selecting this option indicates that minor changes occurred.
4. To close the document, and then delete the local copy of the document after it is added, select **Close and Delete Local Copy**.
5. (Optional) In the **Comments** box, type any notes you want to make about the changes.  
The comments you type appear in the **Comments** column when the revision history is viewed for the document.
6. Click **Save**.

### To undo a document check out



#### CAUTION

When you undo a document check out, any changes made while the document was checked out are not submitted.

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1. In the Microsoft Office product, click the **Add-ins** ribbon.
2. In the **Custom Toolbars** group, click **Undo Check Out**.
3. To close the document, and then delete the local copy of the document after it is added, select **Close and Delete Local Copy**.
4. Click **OK**.

### To view checked out documents

1. In the Microsoft Office product, click the **Add-ins** ribbon.
2. In the **Custom Toolbars** group, click **View Checked Out**.
3. In the **Checked Out Documents** dialog box, a listing of documents you have checked out appears and shows for each item the:
  - Project for the document
  - Path where the document is located
  - Name of the user that has the document checked out
  - Date and time the document was checked out



#### NOTE

If you are logged in as an administrator, you can view the documents that are checked out for all users. To do so, in the **Checked Out Documents** dialog box, click the **Actions** menu, and then point to **Show Documents Checked Out To**. In the list that appears, select the user you want to view. In addition, administrators can undo document check outs for all users.

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### To view the revision history of a document

1. In the Microsoft Office product, click the **Add-ins** ribbon.
2. In the **Custom Toolbars** group, click **View Checked Out**.
3. In the **Checked Out Documents** dialog box, select the document, and then do one of the following:
  - Click the **Actions** menu, and then click **History**.
  - Right-click the selected item, and then click **History**.

## Print Options

PaperVision Tools offers a virtual printer option that converts printable documents into standard image formats while preserving the original document and its layout. Converted images retain all information from the original document so you can easily view the document and send it to PaperVision Enterprise. This feature supports document conversions to several formats, including: BMP, GIF, JPEG, JPEG2000, PDF, TIFF, and PNG. You can specify the image format in the **Printer Properties**.



### NOTE

Before you can print documents to PaperVision Enterprise, you must be logged in to PaperVision Tools. (See "To log in" on page 17 for instructions.) In addition, connectivity options must already be specified. If the **Options** dialog box appears when you try to print documents to PaperVision Enterprise, see "Configure Options" on page 16 for information about the options.

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### To print to PaperVision Enterprise

1. Open the document in its native application.
2. On the **File** menu, click **Print** to open the **Print** pane or dialog box.
3. From the **Printer** list, select one of the following virtual printer modes:
  - **PaperVision (Black & White)** - This mode prints to monochrome TIFF, BMP, GIF, PDF, and PNG files at a faster printing speed.
  - **PaperVision (Color)** - This mode prints to monochrome, 256, grayscale, and true color files at a slower printing speed.
4. Specify any other printing preferences and properties, and then click **Print**.
5. When the **Add Documents** dialog box appears, in the **Project** list, select the project where you want the document printed.
6. In the **Document Index Fields** area, in the **Index Value** column, type a value for the corresponding index.
7. To place the document in a folder under the project, click the ellipses button next to the **Folder** box, and then in the **Choose Folder** dialog box, do one of the following:
  - In the **Folder** area, click the folder, and then click **OK**.
  - To add a folder, click **New Folder**, type a name for the folder, and then click **OK**.
8. Click **Save**.