


PaperStream Capture Pro Box Connector 4

User's Guide

How to Use This Manual

The following shows the tips for using this manual.

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- In this manual, you can use the Search tool of Adobe® Acrobat® or Adobe® Reader®. For details, refer to the Help of Adobe® Acrobat® or Adobe® Reader®.
- Use the [Page Up] key to return to the previous page, and the [Page Down]key to go to the next page.
- Click the text that is in blue or the text in the Contents (the text where the cursor of the mouse changes to the shape (such as ) indicating that a page is linked to it) to go to the linked page.

Introduction

Thank you for using PaperStream Capture Pro Box Connector 4 (referred to as the "Box Connector" hereinafter).

Box Connector is an application that is used to link PaperStream Capture Pro with Box. This manual contains an overview of Box Connector and explains how to install it, how to use it, and how to troubleshoot problems.

For details about the PaperStream Capture Pro functions, refer to the PaperStream Capture User's Guide.

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Conventions

Abbreviations Used in This Manual

The operating systems and products in this manual are indicated as follows.

Name	Indication
Windows® 10 Home (32-bit/64-bit)	Windows 10
Windows® 10 Pro (32-bit/64-bit)	
Windows® 10 Enterprise (32-bit/64-bit)	
Windows® 10 Education (32-bit/64-bit)	
Windows Server® 2016 Standard (64-bit)	Windows Server 2016
Windows Server® 2019 Standard (64-bit)	Windows Server 2019
Windows Server® 2022 Standard (64-bit)	Windows Server 2022
Windows® 11 Home (64-bit)	Windows 11
Windows® 11 Pro (64-bit)	
Windows® 11 Enterprise (64-bit)	
Windows® 11 Education (64-bit)	
Windows 10, Windows Server 2016, Windows Server 2019, Windows Server 2022, or Windows 11	Windows
Microsoft® Word	Word
Microsoft® Excel®	Excel
Microsoft® PowerPoint®	PowerPoint

Arrow Symbols in This Manual

Right-arrow symbols (→) are used to separate icons or menu options you should select in succession.

Example: Click [Start] menu → [Control Panel].

Screen Examples in This Manual

Microsoft product screenshots are reprinted with permission from Microsoft Corporation.

The screen examples in this manual are subject to change without notice in the interest of product development.

The actual windows and operations may differ depending on the operating system. If the actual screen differs from the screen examples in this manual, operate by following the actual displayed screen.

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Before Using Box Connector

This section provides an overview of Box Connector and describes the installation instructions.

Overview

Box Connector is an application that is used to link PaperStream Capture Pro with Box. With Box Connector, images scanned with the scanner from PaperStream Capture Pro can be saved in the Box folder, which allows you to use the simple and secure file collaboration service provided by Box.

Installation

The download package for Box Connector contains the following files:

- UG_EN.pdf (this manual)
- PSCBCx.x.x.exe (x.x.x varies depending on the version.)

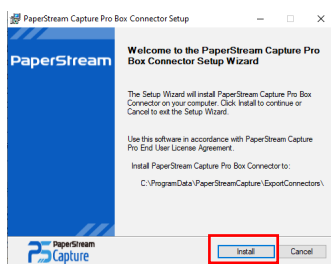
Installation Instructions

Install Box Connector in the following procedure.

Start the procedure after exiting PaperStream Capture Pro.

1. Run PSCBCx.x.x.exe.
2. If the [User Account Control] window appears, click the [OK] button.
3. In the language selection window, select a language for the product to install and click the [OK] button.

In the [PaperStream Capture Pro Box Connector Setup], click the [Install] button.



⇒ Installation starts.

4. Click the [Finish] button.

If you have a previous version of Box Connector installed, you will be asked to uninstall the previous version before installing this version.

ATTENTION

If a message appears, indicating that the installation may not have completed successfully, ignore the message by clicking the [Cancel] button.

Uninstall the previous version and then run PSCBCx.x.x.exe again to restart the installation process. For details about the uninstallation instructions, refer to "[Uninstallation Instructions](#)".

Uninstallation Instructions

Uninstall Box Connector in the following procedure.

1. Display the [Control Panel] window.
 - For Windows 10/Windows Server 2016/Windows Server 2019/Windows Server 2022
Click [Start] menu → [Windows System] → [Control Panel].
 - For Windows 11
Click [Start] menu → [All apps] → [Windows Tools] and double-click [Control Panel].
2. Click [Uninstall a program].
 - ⇒ The [Programs and Features] window appears with a list of currently installed software programs.
3. To uninstall this version of Box Connector, click [PaperStream Capture Pro Box Connector].
To uninstall a previous version of Box Connector, click [PSC Box Connector].
4. Click the [Uninstall] button or the [Uninstall/Change] button.
5. If a confirmation window for the uninstallation appears, click the [OK] button or the [Yes] button.
 - ⇒ The program is uninstalled.

ATTENTION

Uninstalling PaperStream Capture Pro does not uninstall Box Connector. When you uninstall PaperStream Capture Pro, be sure to uninstall Box Connector too.

How to Use Box Connector

Box Connector is easy to use. Just create a job for Box, scan a document by using the job, edit the data extraction definitions as necessary, and output the extracted data. This section describes how to use Box Connector, such as creating a job for Box, and using the job to scan a document.

ATTENTION

- When you use the Box Enterprise plan for Business to sync the PaperStream Capture Pro data extraction field with the Box metadata template, you can add PaperStream Capture Pro extracted data to a Box document as context.
Doing so allows you to manage and search for files and folders easily.
For details about how to sync the data extraction definitions, refer to "[Creating a New Job for Box](#)".
- Each time you access Box to perform operations such as creating/editing a job for Box or uploading data to Box storage, you will be asked to log in with your Box account.
Once you save your login account information, you will not be required to enter your login account information each time you access Box.
For information on how to save your login account information, refer to "[Creating a New Job for Box](#)".

Creating a Job for Box

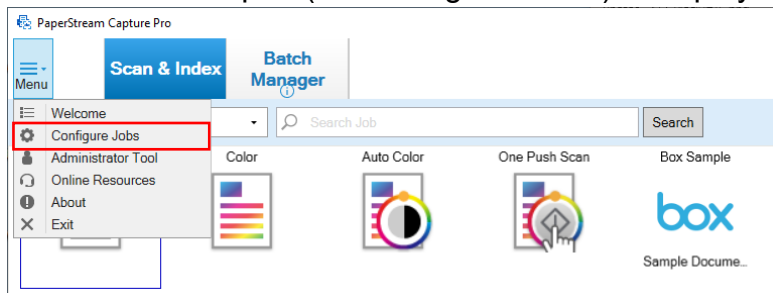
Editing the Sample Job for Box

Box Connector comes with the sample job for Box. You need to edit this job to use the scanner connected to your computer.

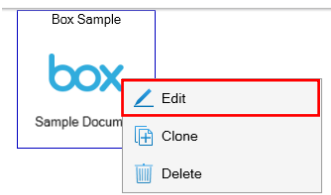
ATTENTION

Changing the scanner may fail in certain conditions. In such a case, follow the instructions under "[Creating a New Job for Box](#)" to create a new job.

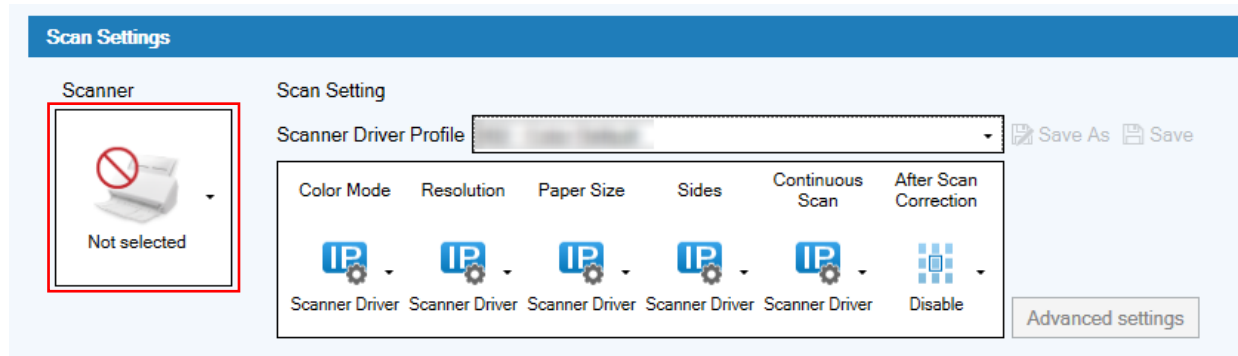
Run PaperStream Capture Pro and select [Configure Jobs] from the menu. A job called "Box Sample" (see the figure below) is displayed.



Edit the job (right-click the job icon and click [Edit] in the menu displayed).




In the [Scan] tab, select the correct scanner in the [Scanner] drop-down list.



If you have purchased and enabled the import option, you can use PaperStream IP Import to import images.

For details about how to sync the data extraction definitions of a job with the Box metadata template, refer to "[Creating a New Job for Box](#)".

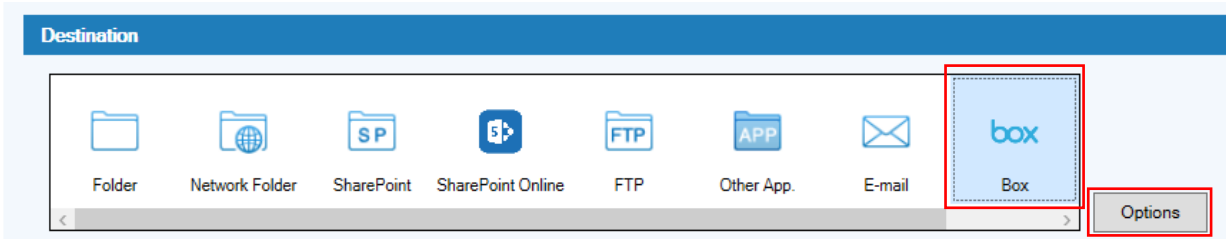
Creating a New Job for Box

To create a new job, click  at the top of the job configuration window.

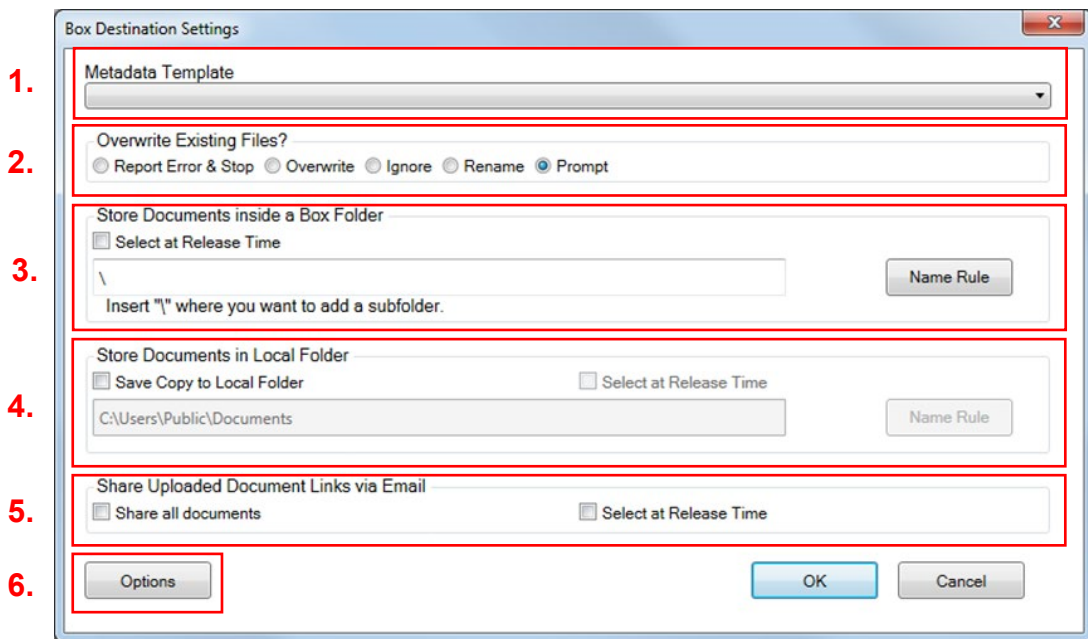
In the [Job Information] tab, specify [Job Name] and [Description] (optional), select an icon, and specify [Batch Name] (a batch name can be used as extracted data later if necessary).

In the [Scan] tab, select a scanner, scan settings as well as other settings.

In the [Destination] tab, select the Box icon (see the figure below). You may have to scroll down to display the icon.



Click the [Options] button to display the [Box Destination Settings] window. If you create a job for Box for the first time, you will be asked to log in to Box with your Box account. When you log in to Box successfully, the [Box Destination Settings] window appears (see the figure below).



1. Metadata Template

The [Metadata Template] drop-down list shows metadata templates that you defined in Box and marked as visible. If there is no defined metadata template, the [Metadata Template] drop-down list shows nothing.

You will be asked whether to sync the settings in this window and the settings of your job with the Box metadata template when you close the [Box Destination Settings] window.

Syncing them removes fields that are defined as the data extraction fields for the job that you are currently editing and adds the same data extraction fields as the ones that are defined in the Box metadata template. If you have not selected a metadata template, fields that are defined as the data extraction fields for the job are removed.

2. Overwrite Existing Files?

This can be used to specify an action to take if a file that you are uploading exists in the Box folder already. The default is [Prompt], which displays a window asking you whether to overwrite a file, rename a file, or exit with an error.

3. Store Documents inside a Box Folder

A save destination folder in the Box folder can be selected in the [Box Destination Settings] window now or when outputting data. To select a folder, click the [Name Rule] button and select [Browse] from the displayed list. A window for browsing appears, showing all the folders you have created in the Box folder in a tree format. Select a folder from the folder tree as a save destination folder. You can create new subfolders in this window if necessary. A data extraction name can be selected from the list that is displayed by clicking the [Name Rule] button. You can select a data extraction name from all (displayable) data extraction names that are associated with the metadata template that is selected from the [Metadata Template] drop-down list. You can create subfolders based on the extracted data value by adding a data extraction name to a folder name.

For example, if you specify the following, the upload destination becomes "test\Alabama\".

- Data extraction field name (= PaperStream Capture Pro field name)
State
- Value
Alabama
- Save destination folder in the Box folder
\test\

Use "\" as a delimiter for a subfolder.

4. Store Documents in Local Folder

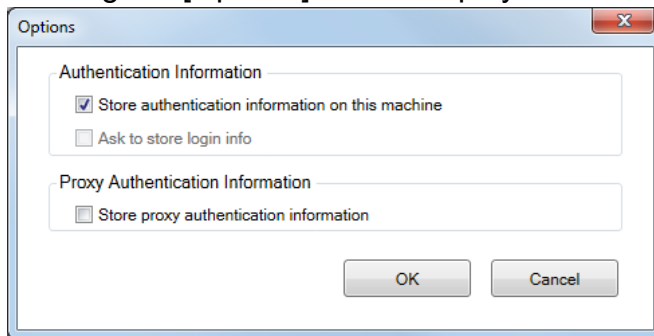
A copy of an image that was uploaded to the Box folder can also be saved in a local folder. A save destination folder can be selected in the [Box Destination Settings] window now or when outputting data. The way to specify a local folder is the same as the way to specify a save destination folder in the Box folder.

5. Share Uploaded Document Links via Email

By sending a URL image via an e-mail, you can share the uploaded image with other users. This function uses your default email client. If you do not have an e-mail client, this function will not work.

6. [Options] Button

Clicking the [Options] button displays the window below.



In the [Options] window, you can specify whether to save your login account information for BOX on your computer and whether to be asked to save the login account information after logging in.

You can select an option to save your login account information on your computer if you do not want to enter this information each time you access Box. If you are using a shared computer, do not save your login account information. To delete the saved login account information, clear the [Store authentication information on this machine] check box and click the [OK] button.

Scanning Using a Job for Box

To scan with a job for Box that you created, click the job in the [Scan & Index] window or the [Scan] window.

Indexing and Outputting Data

When data extraction is defined in the job, enter a value in the data extraction field after a scan, click the [Complete Batch] button, and then output the batch to the Box folder. A progress window shows the output progress.

Troubleshooting

This section explains how to troubleshoot problems that occur during the installation and operations.

How to Troubleshoot Problems That Occur during the Installation

Installation Cannot Be Completed

- If PaperStream Capture Pro 2.5 or later is not installed, the installation of Box Connector will not complete. Update PaperStream Capture Pro that you are using before installing this application.
- If PaperStream Capture or one of its background processes is running, the installation of Box Connector will not complete. For some of the background processes associated with PaperStream Capture Pro, you are asked to terminate the background processes and install the application again. If you cannot terminate the processes, you will need to terminate them using the Windows Task Manager or restart your computer before installing the application again.

Sample Job for Box Is Not Imported

When Box Connector is installed, the sample job for Box is created. The sample job for Box may not be created in the job list for PaperStream Capture Pro. Even if this occurs, you can still use Box Connector. In such a case, refer to "[Creating a New Job for Box](#)" and create a job for Box.

Error Occurs during Installation

If an error occurs during installation, check the error message displayed and take actions accordingly.

If the problem persists, uninstall Box Connector, restart your computer, and reinstall Box Connector. For details about the uninstallation instructions, refer to "[Uninstallation Instructions](#)".

How to Troubleshoot Problems That Occur during the Operations

Box Metadata Template Has Been Changed

When the Box metadata template is changed and then synced with the job again, the values in the additional settings such as the [Field Attributes] or [Field Rules] setting in the data extraction definitions for the job are overwritten with the values in the Box metadata template settings.

Manually change the values that have been overwritten in the data extraction definitions for the job if necessary.

Large Number Values Are Not Saved Correctly in Box

This is due to a limitation in the Box API that converts numbers to a floating point format. This format can accept numbers up to 16,777,215 correctly but any number larger than that is rounded off to fit the floating point number format. Save all fields that require larger values as strings. Number fields are automatically restricted to a maximum of 16,777,215. If the user changes this restriction, the number in Box may be rounded off and may be incorrect.

Uploading a File That Is Large in Size Takes Time

Note that uploading a file that is large in size may be time consuming depending on the network. This can result in a network timeout as well.

Saving a Temporary File Locally Fails

In the following cases, saving a file in a local work folder may fail.

- The pathname of a file goes over the limit of 255 characters set by Windows
- The file or folder contains invalid characters in the name or has an access restriction

This error occurs when data extraction field values are used in file or folder names.

Word/Excel/PowerPoint Files Are Not Uploaded

Configure the output settings for Word/Excel/PowerPoint files in the [Output] tab in the [PaperStream Capture Pro Administrator Tool] Window. Click the [Settings for ABBYY FineReader for ScanSnap] button to display the [ABBYY FineReader for ScanSnap x.x Settings] window ("x.x" indicates the version). Clear the [Open recognized documents] check box in the [General settings] tab.

Notes

Box offers Personal plans and Business plans for you to use.

This Box Connector supports all plans. However, whether Box Connector supports metadata and metadata templates varies depending on the Box plans.

For more information, contact Box Inc. (<https://www.box.com/>).