



PaperStream Integration

For PaperStream Capture Pro Laserfiche Integration User Manual

Overview

This guide describes how to configure an integration from PaperStream Capture Pro or Pro Premium to Laserfiche.

Note: Whenever PaperStream Capture Pro is referred in this document, it refers to PaperStream Capture 4.x Pro or PaperStream Capture 5.0 Pro or PaperStream Capture 5.0 Pro Premium.

Once configured, documents and associated meta-data can be exported from PaperStream Capture Pro to Laserfiche destinations (template/folder combinations).

It is assumed that the user has already installed and activated PaperStream Capture Pro and verified that it can scan (or import) with supported Ricoh scanners.

Installation

The user should have received a download link for the PaperStream Integration for Laserfiche installer for Windows. This is a self-extracting executable.

Download and run the self-extracting executable as an administrator (right click and Run as Administrator).

The installer should extract the contents of the executable and show an installation dialog.

The installation dialog will inform the user about any previous version of the n system installed on the client machine. In most cases, the existing installation should be automatically upgraded. If an uninstallation or old software is required, the installer will inform the user.

If uninstallation is required, the user should uninstall any old software as per the installation instructions and then install the new version.

The installer should automatically detect the existence of PaperStream Capture Pro and if it is not present, inform the user about it as well. Any other prerequisites are determined, and any missing requirements are pointed out by the installer.

After all prerequisites have been verified, the installer will install the integration software.

Accept the defaults to complete the installation.

At the end of the installation, a screen with a list of integrations included will be shown. The Laserfiche integration will be shown selected. Leave it selected and complete the installation.

Following installation, a configuration screen will be displayed.

Configuration

The configuration application can be launched from the start menu by selecting PaperStream Integration Configurator.

The configuration application can be used to configure each integration included (and selected) in the package. In addition, there are general settings as described below.

General Settings

Log files are created under \ProgramData\PFU\EasyNXConnectWin\ConnectorLogs (for integrations) and \Program Files\PFU\EasyNXConnectWin\Logs (for the configurator). These log files are created once per calendar day. New log files are added every day when the integrations or the configurator are used.

Automatic cleanup of log files can be set up in the general settings section. The default is to delete logs older than 10 days. It is recommended that this setting is kept so if there is a problem, the log files can be used to identify and fix the problem.

Released documents are marked as processed and cleaned up after they are uploaded to the selected destination. The default retention period is 10 days. However, this value should be changed according to the user organization's retention policy. Setting this value to 0 will delete documents immediately after they are uploaded.

Note: It is possible that when documents are uploaded using the destination's API/SDK that they are kept 'locked' during the upload process. Hence, the integration may fail to delete the documents immediately. In such cases, a background service called 'PaperStream Integration Maintenance Service' will check every hour for any documents pending to be deleted and delete them.

Lock Settings

The configuration program requires administrative access. However, an administrator can lock all the settings using a password so the settings cannot be changed inadvertently. If a lock password is specified, the password must be entered to launch and edit the settings in the configuration application. If the password is set to an empty value, it is considered as removed.

Integrations

The integrations panel is where an administrator will set up an integration's key configuration parameters.

If the integration package includes multiple integrations, use the dropdown box to select the integration to configure and enter appropriate settings below.

Note: In this user guide, only the Laserfiche integration related settings will be described. For other integrations (that can be added using the Add/Remove Integrations button), please refer to the User Manual for each of the integrations.

Laserfiche Integration

In the settings screen, for AUTHORIZATION_TYPE dropdown of CLOUD_ACCESS_KEY:

This is meant for use with Laserfiche Cloud.

Because the repository will be accessed programmatically, a Service Principal Key and an Access Key must be provided.

These can be generated from the repository administration screen under the Developer Console within the Laserfiche Administration console. Please consult with your Laserfiche representative to generate the correct OAuth 2.0 keys.

Once the SERVICE_PRINCIPAL_KEY and the ACCESS_KEY have been generated and entered here, enter the Repository ID. This is shown on the Repository Overview page in the Laserfiche Repository Administration console.

Note: The Laserfiche Cloud integration use can be used to connect to only one repository at a time.

For AUTHORIZATION_TYPE dropdown of API_SERVER_USERNAME_PASSWORD:

This is meant for use with a Laserfiche on-premise server.

Because the repository will be accessed programmatically, the Laserfiche Server Protocol, Laserfiche Server IP or hostname, username and password must be provided.

Please consult with your Laserfiche administrator to obtain these settings.

Once the Laserfiche Server Protocol, Laserfiche Server IP or hostname, username and password are entered here, enter the default Repository ID. This is shown on the Repositories view in the Laserfiche Repository Administration console.

Save the changes by clicking on the Save button at the bottom of the page.

PaperStream Capture Profiles

A PaperStream Capture profile can be created to upload scanned documents and meta-data directly into a specific Laserfiche folder for a specific Laserfiche template.

There are two ways to create PaperStream Capture profiles to export to Laserfiche destinations. These are described below.

Mapping Profiles from the Configurator

Click on the Map Profiles button within the configurator (the required Laserfiche settings must be entered for this to work).

If the settings mentioned above are entered correctly, the system will automatically connect to the Laserfiche repository and retrieve all the templates and folders defined.

For Laserfiche on-premise, select a Laserfiche repository.

To create a PaperStream Capture profile, select an existing profile from the dropdown on the top left-hand side. This profile will be used to clone a new profile for Laserfiche destinations.

Then, select a Laserfiche template from the dropdown menu on the top right side.

Finally, select a folder where you want documents stored from the folder tree on the right side. Expand any folder with a plus in front of it to reveal any subfolders under it.

Once the above three entities are selected, click on the Map to Profile button.

Note: If PaperStream Capture or any of its background processes are running, the system will inform the user and close those processes. Make sure any unsaved data within PaperStream Capture is saved.

A new PaperStream Capture Pro profile will be created with a prefix of LF_ (for Laserfiche Cloud) or a prefix of LFO_ (for Laserfiche on-premise) followed by the template name and the folder name. (Spaces in the names will be replaced with _.)

Note: PaperStream Capture has two types of profiles – form-based, or page-based. Form based profiles involve automatic form recognition and automatic zonal data extraction. Currently, only page-based profiles can be cloned for Laserfiche destinations. For form-based profiles, use the manual profile creation approach mentioned below.

After the profile is created, select the Laserfiche index fields that need to be mapped to the PaperStream Capture Pro profile.

The required index fields for the selected template are marked and cannot be unselected.

Once the fields are selected, click on the Map Fields button.

The system will go through the selected Laserfiche fields and any existing PaperStream Capture Pro fields and compare them. It will inform the user if any fields exist in PaperStream Capture Pro that match the Laserfiche fields, if any fields that match partially or if new fields need to be created.

Once the user decides to go ahead with the field creation, the system will create fields in PaperStream Capture Pro as follows:

- The PaperStream Capture Pro fields will have the exact name as the Laserfiche fields. This is how they are matched with each other
- The PaperStream Capture Pro field types will be matched as closely with the Laserfiche field types as possible. Currently, the following type matching is performed:
 - o Strings in Laserfiche are mapped to Text fields in PaperStream Capture; any length limitation in Laserfiche is copied to PaperStream Capture.
 - o Integer (or Short Integer) in Laserfiche is mapped to Number with zero decimal places in PaperStream Capture; the maximum value for an integer is set to 64,999.
 - o Long Integer in Laserfiche is also mapped to Number with zero decimal places in PaperStream Capture; the maximum value for a long integer is set to 3,999,999,999.
 - o Number in Laserfiche is mapped to Number with automatic decimal places in PaperStream Capture; the maximum value for an integer is set to 1E+16.
 - Note: Only the General format for number is currently supported. Other number formats are not mapped – percent, scientific, currency and custom.
 - o Also note: Explicit numeric constraints are currently not mapped. For example, if a numeric value was constrained to have between 1 and 3 digits, that information is not mapped to PaperStream Capture Pro currently. This will be implemented in a subsequent release.
 - o Date, Time and Date/Time types in Laserfiche are all mapped to Date/Time in PaperStream Capture Pro.
 - o List in Laserfiche is mapped to Choice List in PaperStream Capture Pro and the list values are mapped over.
 - Note: Blank entries and multiple values are currently not supported
 - The sort order specified in Laserfiche is used in PaperStream Capture Pro
 - o Data format in Laserfiche is not mapped

All fields are mapped as Manual Entry fields in PaperStream Capture Pro. The user must then go to PaperStream Capture Pro to appropriately modify the field recognition methods.

The user can click on Close to complete the mapping operation and return to the Configuration screen.

Mapping Profiles Manually in PaperStream Capture Pro

To manually create profiles in PaperStream Capture Pro, do the following:

- Launch PaperStream Capture Pro
- Click on Configure Jobs
- Clone an existing profile or create a new profile
 - o Note: Profiles named 'One Push Scan' . 'Compatible with ScanSnap Manager' or any cloned from those profiles are not suitable for Laserfiche export
- The only settings that are relevant to Laserfiche export are as follows. All other settings can be set to whatever the user wishes.
 - o Under Destination:

- Select Other App.
 - Select Options
 - For the Application Path:
 - For Laserfiche Cloud usage, browse to C:\ProgramData\PFU\EasyNXConnectWin\ExportConnectors and choose EasyNXConnect.LFConnector.exe (note, select the application, not the config file)
 - For Laserfiche on-premise server, browse to C:\ProgramData\PFU\EasyNXConnectWin\ExportConnectors and choose EasyNXConnect.LFOnPremConnector.exe (note, select the application, not the config file)
 - For Parameters, replace any existing parameters with the following:
%i -t="<path of the Laserfiche folder where documents will be exported>" -TN="<name of the Laserfiche template>"
- For the path, use the following format: /<top folder>/<subfolder1>/<subfolder2>
- For Laserfiche on-premise server a -repo="<name of Laserfiche repository>" parameter can be specified. If this parameter is not specified, the default repository id value from the configuration will be used.
- For the Work Folder, browse to a folder of your choice where documents will be stored temporarily. Do not choose Desktop or the root level folder.
- Click OK to save the options
 - Select the output file type
 - Note: single page TIFFs and single page PDFs are okay if each one is a separate document. A document with multiple individual files is not supported for export to Laserfiche
 - Name the output file so it has a unique name. It is recommended that the output includes a unique prefix and a suffix like the Document Counter or Date/Time when scanning is done.
 - Select 'Output Index Information;' this is required for the integration to work.
 - Select XML as the output index file format
 - Select the 'One file per batch' option
 - Select 'Overwrite if a file exists'
 - Click on Save to save the changes
- Under Data Extraction (if you need to export meta-data to Laserfiche)
 - Create fields with the same name as the fields in Laserfiche (the field names must match exactly)

- Set up the field type to match the Laserfiche field type
 - Note: An exact match is not possible. Use the following guidelines
 - Integers, Long Integers and Numbers should be mapped to Numbers
 - Date, Time, Date/Time should be mapped to Date and Time
 - For List, choose the 'Type' dropdown at the top to select Choice List and use the Setup button to set the values to match those in Laserfiche
- Where applicable, enter the field length and value limitations to match those in Laserfiche
 - Note: Integers in Laserfiche have a max value of 64,999. Long integers are limited to 3,999,999,999 and general numbers are limited to 1E+16.
- All values entered in PaperStream Capture are uploaded as strings by the integration and Laserfiche will perform the appropriate conversions. Any errors in conversions will be reported back in the Integration exception screen.
- Save the field definitions
 - Save the job definition

Now, you should be able to use this job to scan and upload documents and meta-data to Laserfiche.

A pop-up on the bottom right (tray) will indicate if the document upload has been successful or not.

Also, log files are produced under

\\ProgramData\PFU\EasyNXConnectWin\ConnectorLogs\EasyNXLaserFicheConnector by date of operation. These are text files. Refer to the text file to identify any reported errors.

License

The Laserfiche integration requires a PaperStream Capture Pro license to function. If a valid PaperStream Capture Pro license is present, the License panel in the configurator will inform the user that that license is being used for the connection operation. The integration may work in evaluation mode for up to 30 days without a PaperStream Capture Pro license. After that, any uploads will fail with a license error.

Exceptions

When a Laserfiche upload fails, the failed batch is sent to Exception.

The Exceptions screen shows all the failed batches. Click on View Details to view the reasons for the failure.

If a batch failed to upload because of bad parameters (template incorrect or folder incorrect) or if there was a network failure, these issues can be corrected, and the batch can be retried for upload from within the Exception screen.

If the batch failed for other reasons where a re-scan is required, the exception batch can be deleted.

Optional Settings

The optional settings are not relevant to the Laserfiche integration. The only setting that can be used is the use of Microsoft OCR (Azure Vision based OCR) to extract text from scanned images and to create searchable PDFs.

The user must have their own Azure Vision subscription-id to enable the Microsoft OCR engine.