



Integration Suite for PaperStream Capture
TotalAgility™ Integration Settings User Manual

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Introduction

This manual will describe the TotalAgility Settings page in the Integration Suite for PaperStream Capture Configurator application and how the connector works.

NOTE: It is assumed that the reader of this document has a previous understanding of how the PaperStream Capture Pro software works. This document assumes that PaperStream Capture Pro software is installed on the Windows PC, with a Ricoh fi series scanner connected to it, and scanning from that scanner into PaperStream Capture Pro is functional. It is also assumed that the Integration Suite for PaperStream Capture has been installed on the same Windows PC.

What is Integration Suite for PaperStream Capture Software?

The Integration Suite for PaperStream Capture software is a set of integrations that help a user to upload documents scanned with PaperStream Capture Pro to supported destinations (such as email, TotalAgility, Laserfiche, AWS S3 storage, Microsoft OneDrive, Box, DropBox, etc.). The settings to be configured for each such integration are described in their respective manuals.

TotalAgility Integration Settings

The configuration application can be launched from the Start Menu by selecting the menu “Integration Suite for PaperStream Capture Configurator” under All Apps. A shortcut has been created for this application on the desktop but we also recommend that you pin it to the Start Menu.

This section describes the TotalAgility page in the Integration Suite for PaperStream Capture Settings Configurator. This is an integration settings page that is displayed when the Configurator application is launched, the integrations page is chosen and the TotalAgility Integration is chosen from the dropdown. If you do not see TotalAgility listed in the dropdown in the Integrations page, select Add/Remove and select TotalAgility in the listed integrations.

The Integration Suite for PaperStream Capture for TotalAgility can export scanned documents to a TotalAgility workflow process.

To use this integration, a TotalAgility server URL, along with a username, and password to access that server must be specified. Enter that information in the TotalAgility settings page in the boxes provided for those settings. TotalAgility can be set up to use a Windows (Active Directory) based login information or a local login information setup within TotalAgility. Depending on how it is setup in your organization, choose the Local or Windows Login Type and set the username and password values. Both can be set up and saved but the selected one will be used.

Please note that the server URL must end with “TotalAgility/Services/SDK/” to indicate the use of the TotalAgility API (for example, <https://TAServer/TotalAgility/Services/SDK/>).

Also, note that the username and password information is stored on the local PC and is not shared with other PCs.

Save the settings.

You can click on the Test Integration button to test the upload process. The Test button will display a dialog where you can choose a specific process (the categories of processes are displayed in a tree-view at the top; once a category is selected, the processes for that category are shown in the dropdown below). A document called Test Connector.pdf will be uploaded to the specified process. Verify that this flow works before proceeding further. During the test process, no process variables (other than a few dummy values) are transferred. So, select a process where no process variables are required.



If there is a problem uploading, the test connector batch will be sent to the Exceptions page where more details are shown. Also, a log is generated under \ProgramData\PFU\EasyNXConnectWin\ConnectorLogs under a folder with the current integration's name. Find the latest log and open it to see the reason for the upload error.

The Map Profiles button can be used to map specific TotalAgility processes to PaperStream Capture Pro profiles.

When you click on Map Profiles, a list of all the current profiles within PaperStream Capture Pro (except for ScanSnap mode profiles) will be shown on the left. A list of all processes (across all categories) accessible to the username specified in the settings will be shown under a dropdown on the right.

If you do not see any PaperStream Capture Pro profiles on the right, open PaperStream Capture Pro, and enable the display of the sample profiles. Close PaperStream Capture Pro. Refresh the profile list on the right within Integration Suite for PaperStream Capture Configurator's Map Profiles window. Now you should be able to see profiles.

Select a PaperStream Capture Pro profile as a template (to copy settings from). Note that you can only select 'Page' based profiles. Form-based profiles cannot be mapped and must be mapped from within PaperStream Capture Pro.

Any fields defined for the PaperStream Capture Profile are listed in a list view below on the left-hand side.

Then select a TotalAgility process for which you want to create a PaperStream Capture Pro Profile.

Below the TotalAgility process dropdown window, a list of all the process variables for the selected TotalAgility process are shown. Any required variable is already selected and not un-selectable. Select the variables that you want mapped to the newly created profile. The variables will be mapped to PaperStream Capture Profile fields with the same name and as close to the actual type of the variable.

Finally, click on Create Profiles.

The system may ask to close PaperStream Capture Pro (if open, including the background application visible through the system tray) or offer to close them. Please note that if the system closes these applications, they are terminated without saving any in-progress work. So, save any unsaved work before continuing with the profile creation operation.

The system will also inform you about any process variables that have similar names in the PaperStream Capture profile but with mismatched types. The system will reset the types if continued.

The system creates a PaperStream Capture Pro profile with an abbreviated code for the selected destination (TA for TotalAgility) and the name of the selected TotalAgility process. If there was another profile with the same name, a suffix number is added to make this profile name unique. The output filename is also modified to include the abbreviated integration code and the unique profile name. The selected process variables are mapped to appropriate fields within the newly created PaperStream Capture profile.

Now you can open PaperStream Capture Pro and launch the newly created profile. When the profile is launched, documents will be ingested first. Any data from the ingested documents is extracted and displayed on the indexing screen to the user. The user can validate the index values and release the documents. The documents will be uploaded one at a time to the selected TotalAgility process and any mapping variables will be uploaded as process variables.

NOTE: Always save all changes to prevent any inadvertent loss of settings.

**NOTE: Log files for integration behavior at runtime can be found at
C:\ProgramData\PFU\EasyNXConnectWin\ConnectorLogs**

These log files have details about the flow of the integration process and show information that can be used to fix problems.



Profile Parameters

The following parameters can be specified in the PaperStream Capture Pro profiles for TotalAgility.

To add the parameters, open PaperStream Capture Pro, click on Configure Jobs, right click and edit the profile of interest, select Destination, and select the Options button on top (note: for Integration Suite for PaperStream Capture, the Other App. Option must be selected).

Note: All parameters must have the specified syntax below including the double quotes (if any).

Note: Please leave the %i parameter specified as it is. This is required for the integration to function correctly.

-proc="<TotalAgility process name>" – specify the actual target tray or cabinet name in place of <target tray or cabinet>

-c="<category name>" – specify a category; default is All; if a category is chosen, the process must be from that category

"-i" – include the index file in xml format.

"-ij" – include the index file in JSON format.

"-ocr" – perform OCR.

"-z" – zip the entire batch of documents into one zip file, the zip file will be named the same as the index file output by PaperStream Capture Pro

NOTE: TotalAgility™ is a registered trademark of Tungsten Automation Corporation.

