



PaperStream Integration

For PaperStream Capture Pro
All Integrations User Manual

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Introduction

This manual will describe how to install and use PaperStream Integration software. Uninstallation steps are also described.

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.

What is PaperStream Integration Software?

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

How to Install PaperStream Integration Software

This section describes how to install PaperStream Integration. The installer is downloaded as a single, self-extracting exe file. Administrative privileges are required for installation.

Installation

Save the PaperStreamIntegrationWin.exe self-extracting installer file (this file may have a slightly different name if it was built primarily for a specific destination) to a folder on the machine where you will install. Right-click on this exe and choose 'Run as administrator'. If it does not run with administrator privileges, an error message will be displayed, and the installer will not continue.

The self-extracting exe will extract the installation package into a folder called 'EasyNXConnectWin'. The installation package consists of a main setup program which will be automatically run after the extraction.

The first screen shows if PaperStream Capture is found; if not, an error will be displayed.

A link to the End User License Agreement (EULA) and a link to this installation manual are also shown. Continuing the installation implies that the user accepts the EULA.

The installation is very quick (a couple of minutes). If the installation fails for any reason, an error is displayed and a link to the installer log is displayed.

Once the installation is complete, a list of available destinations is shown for the user to select the ones they want to enable.

An option to launch the configuration application is also shown (on by default). Please review the manuals for General Settings and each destination integration for configuration details.

How to Uninstall PaperStream Integration Software

The PaperStream Integration system can be uninstalled from the Programs and Features dialog in the Windows Control Panel. Select PaperStream Integration Configurator and uninstall it.

PaperStream Integration creates a background service to perform periodic maintenance (removing released documents and log files based on user configured retention time). You may be asked to close the service prior to uninstallation. If the service cannot be automatically closed, you may be asked to close it manually.

Also, a dialog will pop up asking if the database and old log files and folders should be removed prior to uninstallation. If you plan to reinstall the software on this machine, do not check the options. If not, check the options.

The uninstaller will remove all the installed files.

PaperStream Integration Configurator

This application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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 Settings page in the PaperStream Integration Configurator. These settings apply to all applicable integrations. This is the first page that is displayed when the Configurator application is launched.

The configurator application consists of multiple pages:

Settings – the general settings page.

Integrations – a page with the list of currently selected integrations with settings for each integration.

License – a page that displays the currently activated license along with controls to activate/deactivate the license.

Exceptions – a page that displays scanned batches that were not released because of an error during the release process.

OCR Settings – a page that has the settings to enable an external OCR engine to extract text data from the scanned documents and embed them into searchable PDF output.

Individual user manuals are available to describe the above pages, and the settings contained within them. For integrations, each integration’s settings are explained in a separate manual. Click on the Help button on the left bottom of the main Configurator application window to view the help for each section.

Cleanup Settings

Remove log files older than – this setting specifies how long log files should be kept in the system. The range is 0 to 14 days. The default is 10. If this value is set to 0, log files are removed immediately after each integration releases documents. Otherwise, a maintenance service removes older log files periodically.

Delete released documents after – this setting specifies how long documents are kept after they are released. Unselecting the option keeps the documents in the system even after they are released. If this value is set to 0, documents are deleted immediately after they are released by the integrations. Otherwise, older documents are deleted by a maintenance service that runs periodically. The default is 10 days. It is recommended that this option be turned on.

Note: The integration system attempts to delete documents immediately after they are released to a destination. But occasionally, a document can be locked by a destination system and the deletion may fail. In this case, the maintenance service will be able to delete the document later. The maintenance service looks for old documents to delete every hour.

SMTP Settings

These settings are used to send any outbound email from the PaperStream Integration system. Outbound email is sent in various cases, such as from email and fax integrations.

Server address – this is the address of the outbound SMTP server. Any SMTP server that can be accessed from this server can be specified. For example, smtp.gmail.com

Port – the port number to be used for the SMTP server. The default is 25 but this varies depending on the SMTP server. For example, for Gmail, port 587 is used.

Requires SSL – if the SMTP server requires secure transmission, this must be enabled. Most SMTP servers require this flag to be set.

Sender name – This is the display name for the sender of email. Many SMTP servers require that the sender's name match the name of the user logging into the system. Enter a sender name or the user's login for the email system here.

Username and Password fields – SMTP servers require a user to log into the server in order to send email. Enter a username and password to log into the SMTP server.

Lock Settings

An administrator can lock the entire configurator so an unauthorized end user cannot make inadvertent changes to the settings. Provide a password in the Lock Password field to lock this application.

If locked, when the configurator is launched, the user is asked to enter the password before the configurator will show.

The password can be reset by clicking on the Reset button.

There are no character restrictions for the password; however, the password can at most be 15 characters long.

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

PaperStream Integration License Configuration

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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 License page in the PaperStream Integration Configurator. These settings apply to all applicable integrations. This is the third page that is displayed when the Configurator application is launched.

PaperStream Integration Configurator uses the license used by PaperStream Capture Pro.

The license page will display the license information obtained from PaperStream Capture Pro on this page.

If PaperStream Capture Pro is used in evaluation mode, that information will be shown here.

If PaperStream Capture Pro is unlicensed, a corresponding message will be displayed here. The configuration application can be used without a proper license, but the integrations will fail to upload documents.

To use the integrations, please obtain a PaperStream Capture Pro license and activate it within PaperStream Capture’s Administrator Tool.

PaperStream Integration Exception Handling

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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 Exceptions page in the PaperStream Integration Configurator. These settings apply to all applicable integrations. This is the fourth page that is displayed when the Configurator application is launched.

NOTE: All PaperStream Integration modules produce log files. The configurator application stores its log files under C:\Program Files\PFU\EasyNXConnectWin\Logs\EasyNXConnectWinConfigurator.

**Each integration stores log files under:
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.

When a scanned batch of documents are released to one of the integration applications, that application communicates with the destination to send those documents to that destination. However, communication or the upload of the documents can fail for a variety of reasons (incorrect authentication, network problems, etc.).

When such a failure occurs, the batch of documents is sent to the exception handler. The exception handler displays a list of failed batches in the Exceptions page, with the name of the batch along with the date and time when the exception occurred.

Clicking on View Details will open another window where additional details about the failed batch and the reason for the exception are shown.

The user can retry uploading the batch (assuming any problems have been fixed or remove the batch to retry scanning again).

The exception details window shows the parameters that are passed to the integration application by PaperStream Capture Pro. The user can modify these parameters here (see the appropriate integration manual for a description of the parameters for that integration).

On the main exceptions page, the Refresh button can be used to refresh the list of failed batches.

The Remove All Batches button removes all failed batches. Note: this removal is permanent. The documents in the batch are deleted permanently.

PaperStream Integration for Amazon AWS S3 Settings

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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 Amazon AWS S3 Settings page in the PaperStream Integration Configurator. This is an integration settings page that is displayed when the Configurator application is launched, the Integrations page is chosen, and the Amazon S3 Integration is chosen from the dropdown.

The PaperStream Amazon Integration can export scanned documents to an Amazon AWS S3 storage bucket, under a subfolder.

In order to use this integration, an AWS S3 access key id and a secret key are required. To get this, a user must log into their AWS S3 account and create an Access Key ID/Secret Key pair from the Security Credentials page. Please note this information as it may not be displayed once generated. Enter that information here.

Once the access key id and secret key values are entered, click on the Refresh button next to the Default Regions dropdown to get a list of all supported Amazon AWS regions. Select a default region to use to upload documents.

Once the region is selected, the buckets associated with the account are displayed in the bucket's dropdown. Select a default bucket to use to upload documents.

Finally, documents can be uploaded to a specific folder path under a bucket or to the top-level folder. Select Home Folder for the root folder or specify a path (in the form /folder/subfolder/... format). If this folder path does not exist on AWS S3, it will be created at the time of document upload.

Save the settings.

You can click on the Test Integration button to test the upload process. A document called Test Connector.pdf will be uploaded to the default bucket in the default region to the selected folder. Verify that this process works before proceeding further.

If there is a problem uploading, the test integration 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 buckets to PaperStream Capture Pro profiles.

When you click on Map Profiles, a list of all buckets in the selected region will be shown on the left. A list of all the current profiles within PaperStream Capture Pro (except for ScanSnap mode profiles) will be shown 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 PaperStream Integration Configurator's Map Profiles window. Now you should be able to see profiles.

Select a profile as a template (to copy settings from).

Then select one or more AWS buckets for which you want to create PaperStream Capture Pro Profiles. Note: At this time, only buckets can be used destinations to create profiles. The subfolders within buckets are not shown here. The default folder specified for AWS in the integration settings is used as the default folder. This can be changed in the PaperStream Capture Pro profile editor. Also, see the command line options below.

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.

The system creates a PaperStream Capture Pro profile with an abbreviated code for the selected destination (AWS for Amazon AWS S3) and the name of each selected bucket. 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.

Now you can open PaperStream Capture Pro and launch the newly created profiles.

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 Amazon AWS S3.

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: PaperStream integrations, 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.

-t="<target folder path>" – specify the actual target folder path in place of <target folder path>

-s="<region>" – specify the region if different from the default in <region> (s stands for site, used with many integrations)

-r="<bucket name>" – for a bucket different from the default bucket, specify here replacing <bucket name> (r stands for repository, used with many integrations)

“-f” – include the batch folder if one is specified when uploading.

“-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

PaperStream Integration for Azure Blob Storage Settings

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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 Azure Blob Storage settings page in the PaperStream Integration Configurator application. This is an integration settings page that is displayed when the application is launched, the integrations link is clicked, and the Azure Blob Storage is chosen from the integrations dropdown.

The integration can export the scanned documents to Azure Blob Storage folder.

To use this integration,

Once the Azure Blob Storage integration settings are shown, you will see Storage Account Name, Container Name, Access Type and input field to enter the access information (Connection String/Access Type/Shared Access Signature). These settings are required for authenticating the user and accessing the appropriate Storage container to upload documents.

Storage Account Name, Container Name and access information (Connection String/Access Type/Shared Access Signature) can be obtained by logging in to the Azure Portal using your Azure account.

Default Folder option is not mandatory. If specified, the folder will be created on the Storage container (if not exists) and file will be uploaded to this folder. If not specified, the file will be uploaded directly under the specified storage container.

Save the settings.

You can click on the Test Integration button to test the upload process. A document called Test Connector.pdf will be uploaded to the to the root or selected folder based on the selected settings. Verify that this process works before proceeding further.

If there is a problem uploading, the test integration 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 buckets to PaperStream Capture Pro profiles.

When you click on Map Profiles, a list of all folders from the authenticated user’s account will be shown on the left. A list of all the current profiles within PaperStream Capture Pro (except for ScanSnap mode profiles) will be shown 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 PaperStream Integration Configurator’s Map Profiles window. Now you should be able to see profiles.

Select a profile as a template (to copy settings from).

Then select one or more Azure Blob Storage containers for which you want to create PaperStream Capture Pro Profiles.

Finally, click on Create Profile(s).

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.

The system creates a PaperStream Capture Pro profile with an abbreviated code for the selected destination (AZB) and the name of each selected folder. 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.

Now you can open PaperStream Capture Pro and launch the newly created profiles.

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 Azure Blob Storage Integration.

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: PaperStream integrations, 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.

-an="<name of the storage account>"

-ct="<name of the container under the specified storage account>"

-t="<target folder path>" – specify the actual target folder path in place of <target folder path>

“-f” – include the batch folder if one is specified when uploading.

“-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

PaperStream Integration for Azure File Share Settings

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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 Azure File Share settings page in the PaperStream Integration Configurator application. This is an integration settings page that is displayed when the application is launched, the integrations link is clicked, and the Azure File Share is chosen from the integrations dropdown.

The integration can export the scanned documents to Azure File Share folder.

To use this integration,

Once the Azure File Share integration settings are shown, you will see Storage Account Name, File Share Name, Access Type and input field to enter the access information (Connection String/Access Type/Shared Access Signature). These settings are required for authenticating the user and accessing the appropriate File share to upload documents.

Storage Account Name, File Share Name and access information (Connection String/Access Type/Shared Access Signature) can be obtained by logging in to the Azure Portal using your Azure account.

Default Folder option is not mandatory. If specified, the folder will be created on the File share (if it does not exist) and the file will be uploaded to this folder. If not specified, the file will be uploaded directly under the specified file share.

Save the settings.

You can click on the Test Integration button to test the upload process. A document called Test Connector.pdf will be uploaded to the to the root or selected folder based on the selected settings. Verify that this process works before proceeding further.

If there is a problem uploading, the test integration 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 buckets to PaperStream Capture Pro profiles.

When you click on Map Profiles, a list of all folders from the authenticated user's account will be shown on the left. A list of all the current profiles within PaperStream Capture Pro (except for ScanSnap mode profiles) will be shown 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 PaperStream Integration Configurator's Map Profiles window. Now you should be able to see profiles.

Select a profile as a template (to copy settings from).

Then select one or more Azure File Shares for which you want to create PaperStream Capture Pro Profiles.

Finally, click on Create Profile(s).

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.

The system creates a PaperStream Capture Pro profile with an abbreviated code for the selected destination (AZB) and the name of each selected folder. 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.

Now you can open PaperStream Capture Pro and launch the newly created profiles.

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 Azure File Share Integration.

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: PaperStream integrations, 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.

-an="<name of the storage account>"

-fs="<name of the file share that is present under the specified storage account>"

-t="<target folder path>" – specify the actual target folder path in place of <target folder path>

“-f” – include the batch folder if one is specified when uploading.

“-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

PaperStream Integration for Box Settings

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

This section describes the Box page in the PaperStream Integration Configurator. This is an integration settings page that is displayed when the Configurator application is launched, the integrations page is chosen, and the Box integration is chosen from the dropdown.

PaperStream Box Integration can export scanned documents to a Box folder.

This integration uses OAuth to authenticate a user with Box.com and uses Box’s APIs to upload documents to the user’s folders using their OAuth authentication.

To authenticate with Box.com, PaperStream Integration’s own Application ID and Secret have been specified here along with a pre-registered redirect URL. All that the user needs to do is click on the Authenticate button to log into the Box system and allow this app to upload documents to their folders on their behalf. Once authenticated, the login expiration will display. If the user does not upload documents to their Box account using this application before that date, they will need to re-login. As long as the user keeps uploading documents, the login expiration date will get extended.

If the user wishes to change the app id and secret, they can replace them with their own. They can copy the redirect URL from this application and register it with Box.com.

By default, any document uploaded with no folder specified will go to the user’s home folder (root folder). A specific folder path (in the form /folder/subfolder ...) can be specified as the default location. Folder locations can also be specified as a parameter in the PaperStream Capture Pro profile (see the parameters section below).

Save the settings after authentication.

You can click on the Test Integration button to test the upload process. A document called Test Connector.pdf will be uploaded to the folder specified in the integration settings. Verify that this process works before proceeding further.

If there is a problem uploading, the test integration 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 folder paths to PaperStream Capture Pro profiles.

When you click on Map Profiles, a list of all folders accessible to the logged in user will be shown on the left. A list of all the current profiles within PaperStream Capture Pro (except for ScanSnap mode profiles) will be shown 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 PaperStream Integration Configurator's Map Profiles window. Now you should be able to see profiles.

Select a profile as a template (to copy settings from).

Then select one or more folder paths for which you want to create PaperStream Capture Pro Profiles.

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.

The system creates a PaperStream Capture Pro profile with prefix of BOX and the name of each selected folder name. 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.

Now you can open PaperStream Capture Pro and launch the newly created profiles. Profiles can be edited from within PaperStream Capture Pro to make changes to various profile settings.

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 Box.

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: PaperStream integrations, 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.

`-t="<target folder path>"` – specify the actual target folder path name in place of <target folder path>

`"-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

PaperStream Integration for Docuware Settings

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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 Docuware page in the PaperStream Integration Configurator. This is an integration settings page that is displayed when the Configurator application is launched, the integrations page is chosen and the Docuware integration is chosen from the dropdown.

The PaperStream Docuware Integration can export scanned documents to a Docuware tray or cabinet.

In order to use this integration, a Docuware server (on-premise or cloud) URL, along with a username, password for that user and the organization name must be specified. Enter that information here. A default tray or cabinet can be specified as well, particularly to test the integration from within the configurator.

Save the settings.

You can click on the Test Integration button to test the upload process. A document called Test Connector.pdf will be uploaded to the tray or cabinet specified. Verify that this process works before proceeding further.

If there is a problem uploading, the test integration 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 trays or cabinets to PaperStream Capture Pro profiles.

When you click on Map Profiles, a list of all trays/cabinets accessible to the username specified will be shown on the left. A list of all the current profiles within PaperStream Capture Pro (except for ScanSnap mode profiles) will be shown 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 PaperStream Integration Configurator’s Map Profiles window. Now you should be able to see profiles.

Select a profile as a template (to copy settings from).

Then select one or more trays/cabinets for which you want to create PaperStream Capture Pro Profiles.

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.

The system creates a PaperStream Capture Pro profile with an abbreviated code for the selected destination (DW for Docuware) and the name of each selected tray/cabinet. 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.

Now you can open PaperStream Capture Pro and launch the newly created profiles.

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 Docuware.

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: PaperStream integrations, 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.

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

-s="<server>" – specify the server URL if different from the default in <server>

-o="<organization name>" – for an organization different from the default organization, specify here replacing <organization name>

“-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

PaperStream Integration for DropBox Settings

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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 DropBox page in the PaperStream Integration Configurator. This is an integration settings page that is displayed when the Configurator application is launched, the integrations page is chosen and the DropBox integration is chosen from the dropdown.

The PaperStream DropBox Integration can export scanned documents to a DropBox folder.

This integration uses OAuth to authenticate a user with DropBox.com and uses DropBox’s APIs to upload documents to the user’s folders using their OAuth authentication.

To authenticate with DropBox.com, PaperStream Integration’s own Application ID and Secret have been specified here along with a pre-registered redirect URL. All that the user needs to do is click on the Authenticate button to log into the DropBox system and allow this app to upload documents to their folders on their behalf. Once authenticated, the login expiration will display. If the user does not upload documents to their DropBox account using this application before that date, they will need to re-login. As long as the user keeps uploading documents, the login expiration date will get extended.

If the user wishes to change the app id and secret, they can replace them with their own. They can copy the redirect URL from this application and register it with DropBox.

By default, any document uploaded with no folder specified will go to the user’s home folder (root folder). A specific folder path (in the form /folder/subfolder ...) can be specified as the default location. Folder locations can also be specified as a parameter in the PaperStream Capture Pro profile (see the parameters section below).

Save the settings after authentication.

You can click on the Test Integration button to test the upload process. A document called Test Connector.pdf will be uploaded to the folder specified in the integration settings. Verify that this process works before proceeding further.

If there is a problem uploading, the test integration 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 folder paths to PaperStream Capture Pro profiles.

When you click on Map Profiles, a list of all folders accessible to the logged in user will be shown on the left. A list of all the current profiles within PaperStream Capture Pro (except for ScanSnap mode profiles) will be shown 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 PaperStream Integration Configurator's Map Profiles window. Now you should be able to see profiles.

Select a profile as a template (to copy settings from).

Then select one or more folder paths for which you want to create PaperStream Capture Pro Profiles.

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.

The system creates a PaperStream Capture Pro profile with prefix of DROPBOX and the name of each selected folder name. 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.

Now you can open PaperStream Capture Pro and launch the newly created profiles. Profiles can be edited from within PaperStream Capture Pro to make changes to various profile settings.

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 DropBox.

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: PaperStream integrations, 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.

`-t="<target folder path>"` – specify the actual target folder path name in place of <target folder path>

`"-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

PaperStream Integration for Email Settings

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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 Email page in the PaperStream Integration Configurator. This is an integration settings page that is displayed when the Configurator application is launched, the integrations page is chosen, and the Email integration is chosen from the dropdown.

The PaperStream Email Integration can email scanned documents to one or more email addresses.

In order to use this integration, an SMTP server should be specified to send email out on the Settings page of the PaperStream Integration Configurator. Along with the server, the port to be used, if SSL is required, the name of the sender, the username and password required to authenticate to this server should all be specified. Save the settings after entering.

On the email integration page, a default subject, body and default email addresses can be specified. These are optional fields. For multiple email addresses, separate them with a ; (semicolon).

Save the settings.

You can click on the Test Integration button to test the upload process. A document called Test Connector.pdf will be uploaded to the email address(es) specified in the default email address field in the integration configuration settings. Verify that this process works before proceeding further.

If there is a problem uploading, the test integration 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 email addresses to PaperStream Capture Pro profiles.

In the Map Profiles dialog, you can import a list of email addresses as targets by clicking on the Import Target button and import a text file with a .txt extension that has the email information in a specific format. Each line in this file should have a target name (like the name of a person or a group), a separator (comma or tab) and the email address for that target. Here is an example:

Dr Phil, drphil@someemail.com

Dr Jenkins drjenkins@someemail.com

The left-hand side of the Map Profiles dialog will show the target names. The right-hand side of the Map Profiles dialog will show the current PaperStream Capture profiles.

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 PaperStream Integration Configurator’s Map Profiles window. Now you should be able to see profiles.

Select a profile as a template (to copy settings from).

Then select one or more targets for which you want to create PaperStream Capture Pro Profiles.

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.

The system creates a PaperStream Capture Pro profile with an abbreviated code for the selected destination (EML for Email) and the name of each selected target. 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.

Now you can open PaperStream Capture Pro and launch the newly created profiles.

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 email.

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: PaperStream integrations, 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.

-t="<target email>" – specify the actual target email addresses in place of <target email>. Separate multiple email addresses with semicolons

-s="<email server>" – specify the SMTP email server URL if different from the default in <email server>. If a port is required for this email server, specify it at the end of the server's name after a colon (:), like smtp.gmail.com:587

-u="<username>" – specify the username for login if different from the default in <username>

-p="<password>" – specify the user password if different from the default in <password>

"-ssl" – specify this option if ssl is required.

"-nossl" – specify this option if ssl is not required; default is it is not required.

"-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

PaperStream Integration for Fax Settings

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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 Fax page in the PaperStream Integration Configurator. This is an integration settings page that is displayed when the Configurator application is launched, the integrations page is chosen, and the Fax integration is chosen from the dropdown.

The PaperStream Fax Integration can send scanned documents to one or more fax addresses. The fax integration uses the email integration and requires a fax service that can forward email to fax numbers. Such a service should be subscribed to by the user of the integration. They should have a valid account at the fax service provider with the username and password specified in the SMTP settings on the Settings page.

In order to use this integration, an SMTP server should be specified to send email out on the Settings page of the PaperStream Integration Configurator. Along with the server, the port to be used, if SSL is required, the name of the sender, the username and password required to authenticate to this server should all be specified. Save the settings after entering.

On the Fax integration page, a domain name should be specified to attach a fax number (for example, if the fax number is 1234567890 and the domain name is sendfax.com, an email will be sent to 1234567890@sendfax.com and the provider at sendfax.com will send the attached documents to that fax number).

For the fax sender name, either the sender’s name in the SMTP settings can be used or a name can be specified here. Please note that some outbound email servers require the sender’s name to match the login name.

A cover text message can be provided if required.

Finally, a test fax number can be specified; this is only required if the Test Integration function is going to be used.

Save the settings.

You can click on the Test Integration button to test the upload process. A document called Test Connector.pdf will be uploaded to the Fax number(s) (if multiple, separate by semicolon) specified in the default Fax address field in the integration configuration settings. Verify that this process works before proceeding further.

If there is a problem uploading, the test integration 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 Fax numbers to PaperStream Capture Pro profiles.

In the Map Profiles dialog, you can import a list of Fax numbers as targets by clicking on the Import Target button and import a text file with a .txt extension that has the Fax information in a specific format. Each line in this file should have a target name (like the name of a person or a group), a separator (comma or tab) and the Fax number for that target. Here is an example:

Dr Phil, [1234567890](#)

Dr Jenkins [7890123456](#)

The left-hand side of the Map Profiles dialog will show the target names. The right-hand side of the Map Profiles dialog will show the current PaperStream Capture profiles.

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 PaperStream Integration Configurator's Map Profiles window. Now you should be able to see profiles.

Select a profile as a template (to copy settings from).

Then select one or more targets for which you want to create PaperStream Capture Pro Profiles.

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.

The system creates a PaperStream Capture Pro profile with a code for the selected destination (FAX) and the name of each selected target. 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.

Now you can open PaperStream Capture Pro and launch the newly created profiles.

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 Fax.

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: PaperStream integrations, 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.

-t="<target fax>" – specify the actual target fax numbers in place of <target fax>. Separate multiple fax numbers with semicolons

-s="<Fax server>" – specify the SMTP Fax server URL if different from the default in <Fax server>. If a port is required for this Fax server, specify it at the end of the server's name after a colon (:), like smtp.gmail.com:587

-u="<username>" – specify the username for login if different from the default in <username>

-p="<password>" – specify the user password if different from the default in <password>

"-ssl" – specify this option if ssl is required.

"-nossl" – specify this option if ssl is not required; default is it is not required.

-fd="<fax-domain>" – specify the domain to be used to email if different from the default in <fax-domain>

-fct="<fax-cover-text>" – specify the cover text to be used to fax if different from the default in <fax-cover-text>

PaperStream Integration for Folder Settings

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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 Folder page in the PaperStream Integration Configurator. This is an integration settings page that is displayed when the Configurator application is launched, the integrations page is chosen, and the Folder integration is chosen from the dropdown.

The PaperStream Folder Integration can export scanned documents to a local or network folder.

In the folder settings page, a few settings can be chosen as default.

If the ‘Determine folder path automatically’ option is chosen, scanned documents are saved to the user’s local folder (\Users\\Documents\scans).

If the ‘User Folder Under Path’ option is chosen, documents are placed under the specified folder, under a subfolder named after the current user.

If ‘Entered Here’ is chosen, documents are placed under the specified folder.

If authentication may be required to access the folders, the default is to ‘Use Current User Credentials’. ‘Use Following Credentials’ may be specified with a specific username and password.

Save the settings.

You can click on the Test Integration button to test the upload process. A document called Test Connector.pdf will be uploaded to the folder location specified. Verify that this process works before proceeding further.

If there is a problem uploading, the test integration 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 folders to PaperStream Capture Pro profiles.

In the Map Profiles dialog, select the Import Targets button. This will open a folder browser dialog. Select a root folder. The subfolders under this root folder will show as a list on the left. The current PaperStream Capture Pro profiles will be shown in the list box 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 PaperStream Integration Configurator’s Map Profiles window. Now you should be able to see profiles.

Select a profile as a template (to copy settings from).

Then select one or more folders from the left for which you want to create PaperStream Capture Pro Profiles.

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.

The system creates a PaperStream Capture Pro profile with an abbreviated code for the selected destination (FLD for Folder) and the name of each selected folder. 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.

Now you can open PaperStream Capture Pro and launch the newly created profiles.

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 Folder.

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: PaperStream integrations, 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.

-t="<target folder>" – specify the actual target folder path in place of <target folder>

“-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

PaperStream Integration for FTP Settings

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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 FTP page in the PaperStream Integration Configurator. This is an integration settings page that is displayed when the Configurator application is launched, the integrations page is chosen, and the FTP integration is chosen from the dropdown.

PaperStream FTP Integration can export scanned documents to an FTP site. Currently, standard FTP and SFTP protocols are supported.

In the FTP settings page, a few settings can be chosen as default.

In the FTP Server text box, specify the URL or IP address of the FTP site followed by the port number to use to access that FTP site.

Specify the FTP protocol (FTP or SFTP).

If authentication may be required to access the FTP site, specify a username and password.

Save the settings.

You can click on the Test Integration button to test the upload process. A document called Test Connector.pdf will be uploaded to the FTP location specified. Verify that this process works before proceeding further.

If there is a problem uploading, the test integration 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 FTP folders to PaperStream Capture Pro profiles.

In the Map Profiles dialog, the folders within the specified FTP site are shown on the left. The current PaperStream Capture Pro profiles will be shown in the list box 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 PaperStream Integration Configurator’s Map Profiles window. Now you should be able to see profiles.

Select a profile as a template (to copy settings from).

Then select one or more FTP folders from the left for which you want to create PaperStream Capture Pro Profiles.

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.

The system creates a PaperStream Capture Pro profile with an abbreviated code for the selected destination (FTP) and the name of each selected FTP. 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.

Now you can open PaperStream Capture Pro and launch the newly created profiles.

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 FTP.

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: PaperStream integrations, 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.

-s="<FTP Server>" – specify the actual target FTP server URL or IP address in place of <FTP Server>. Specify the protocol up front as ftp:// or sftp://. Specify the port number at the end after a colon (like ftp://11.12.13.14:21)

-u="<username>" – specify the actual username in place of <username>

-p="<password>" – specify the actual user password in place of <password>

-t="<target folder path>" – specify the actual target FTP folder path in place of <target folder path>

“-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

PaperStream Integration for OneDrive for Business Settings

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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.

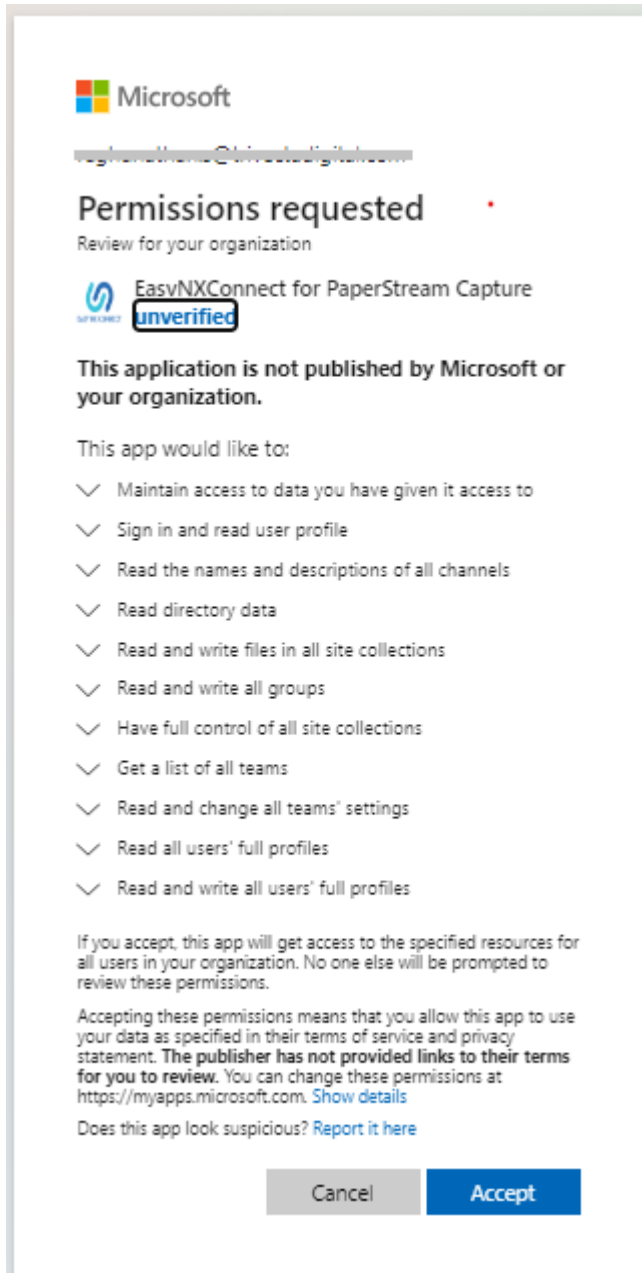
This section describes the OneDrive for Business settings page in the PaperStream Integration Configurator application. This is an integration settings page that is displayed when the application is launched, the integrations link is clicked, and the OneDrive for Business integration is chosen from the integrations dropdown.

The integration can export the scanned documents to a OneDrive folder.

To use this integration,

Once the OneDrive for Business Integration settings are shown, you will see Application ID, Secret and User Principal Name. It is recommended not to change the Application ID and Secret values. Enter the user’s principal name (This can be obtained from the Organization’s Azure Portal), which will be a username that is used to login to the OneDrive for Business account. These settings are required for authenticating the user and uploading the documents to a OneDrive folder.

To authenticate the user, click on the “Grant Admin Consent” button, which will open a new popup window, in which Microsoft’s authentication (login) page will be shown. In this page, enter the account credentials and after successful authentication allow access to the resources by clicking on “Accept” button.



Once the process is completed the user will be authenticated and the Token expires on date will be displayed on the application.

For the authentication process to be successful, please use a user's account that has administrative privileges. For permissions and roles, check the organization's Azure Portal.

Finally, documents can be uploaded to a specific folder path under the top-level folder. Select User's Home Folder for the root folder or select Specific Folder to specify a path (in the *folder/subfolder/...* format). If this folder path does not exist, it will be created at the time of document upload.

Save the settings.

You can click on the Test Integration button to test the upload process. A document called Test Connector.pdf will be uploaded to the to the root or selected folder based on the selected settings. Verify that this process works before proceeding further.

If there is a problem uploading, the test integration 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 buckets to PaperStream Capture Pro profiles.

When you click on Map Profiles, a list of all folders from the authenticated user's account will be shown on the left. A list of all the current profiles within PaperStream Capture Pro (except for ScanSnap mode profiles) will be shown 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 PaperStream Integration Configurator's Map Profiles window. Now you should be able to see profiles.

Select a profile as a template (to copy settings from).

Then select one or more folders for which you want to create PaperStream Capture Pro Profiles. To view the subfolders under a folder, click on the + icon before the folder name.

Finally, click on Create Profile(s).

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.

The system creates a PaperStream Capture Pro profile with an abbreviated code for the selected destination (ODB) and the name of each selected folder. 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.

Now you can open PaperStream Capture Pro and launch the newly created profiles.

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 OneDrive.

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: PaperStream integrations, 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.

`-t=<target folder path>` – specify the actual target folder path in place of <target folder path>

`“-f”` – include the batch folder if one is specified when uploading.

`“-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

PaperStream Integration for SharePoint Online Settings

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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.

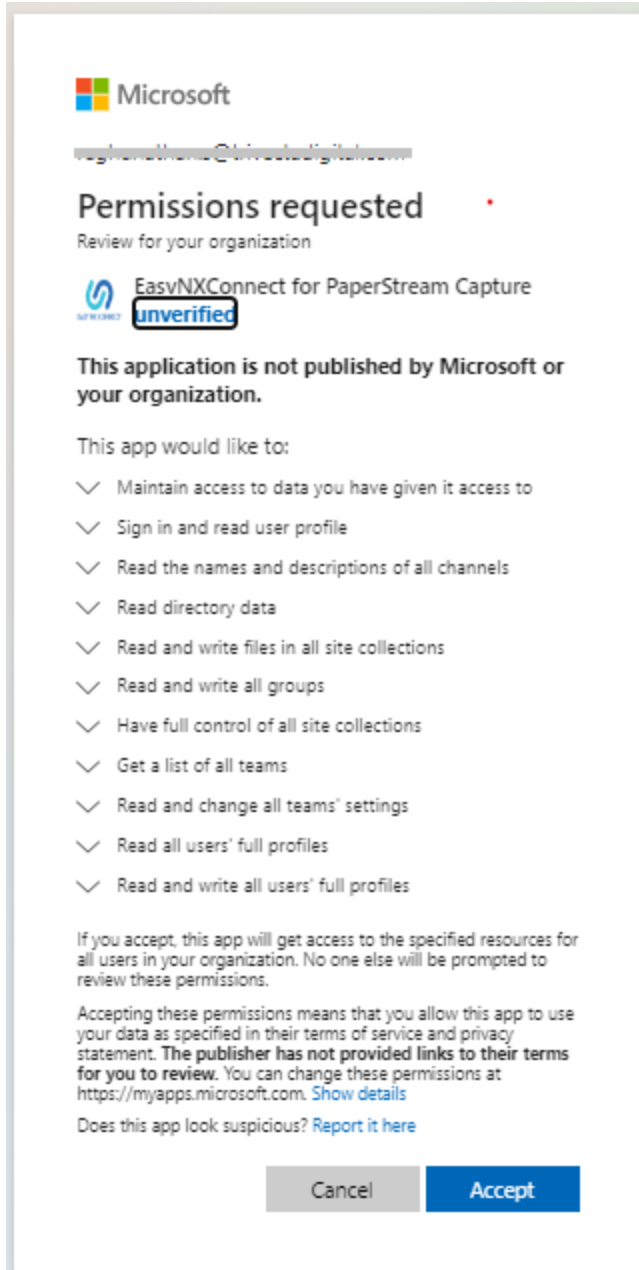
This section describes the SharePoint settings page in the PaperStream Integration Configurator application. This is an integration settings page that is displayed when the application is launched, the integrations link is clicked, and the SharePoint integration is chosen from the integrations dropdown.

The integration can export the scanned documents to a folder under a document library in a specific SharePoint site.

To use this integration,

Once the SharePoint Integration settings are shown, you will see Application ID and Secret. It is recommended not to change the Application ID and Secret values. These settings are required for authenticating the user and uploading the documents to a folder under a document library in a SharePoint site.

To authenticate the user, click on the “Grant Admin Consent” button, which will open a new popup window, in which Microsoft’s authentication (login) page will be shown. In this page, enter the account credentials and after successful authentication allow access to the resources by clicking on “Accept” button.



Once the process is completed the user will be authenticated and the Token expires on date will be displayed on the application.

For the authentication process to be successful, please use a user's account that has administrative privileges. For permissions and roles, check the organization's Azure Portal.

Finally, documents can be uploaded to a specific folder path under the top-level folder. Select User's Home Folder for the root folder or select Specific Folder to specify a path (in the *folder/subfolder/...* format). If this folder path does not exist, it will be created at the time of document upload. The folder will be created under the "Document Library" in the SharePoint site.

Save the settings.

You can click on the Test Integration button to test the upload process. A document called Test Connector.pdf will be uploaded to the to the root or selected folder based on the settings. Verify that this process works before proceeding further.

If there is a problem uploading, the test integration 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.

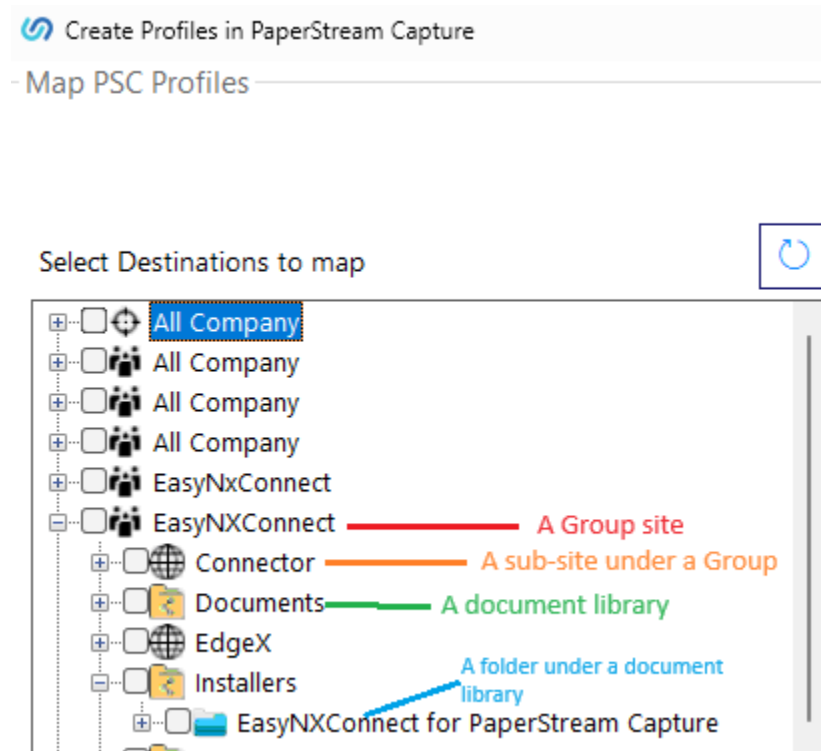
The Map Profiles button can be used to map specific buckets to PaperStream Capture Pro profiles.

When you click on Map Profiles, a list of all folders from the authenticated user's account will be shown on the left. A list of all the current profiles within PaperStream Capture Pro (except for ScanSnap mode profiles) will be shown 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 PaperStream Integration Configurator's Map Profiles window. Now you should be able to see profiles.

Select a profile as a template (to copy settings from).

For SharePoint, the targets will be displayed like a tree structure. Top level elements are the SharePoint site, under which the Document Libraries and sub-sites will be displayed. If a document library is expanded, then the folders under that document library will be displayed.



User can create a profile to

- 1) Upload a file to a specific folder under a document library – To do this, expand the document library and select a folder node.
- 2) Upload a file directly under the document library – To do this expand a site and select a document library.
- 3) Upload a file directly under the default document library (Documents) of a site. To do this, select a select site.

Finally, click on Create Profile(s).

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.

The system creates a PaperStream Capture Pro profile with an abbreviated code for the selected destination (ODB) and the name of each selected folder. 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.

Now you can open PaperStream Capture Pro and launch the newly created profiles.

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 SharePoint.

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: PaperStream integrations, 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.

-site="<name of the SharePoint site>" – NOTE: Here use the actual site name instead of the display name. If it is a Team Site or Comm site or a Group Site, then specify the site like this "**sites**/**<site name>**" and the user must have enough permissions to access the site.

-lib="<name of the document library>" - NOTE: the document library must exist under the site specified in the -site parameter and the user must have enough permission to read-write to this document library.

-t="<target folder path>" – specify the actual target folder path in place of <target folder path>

“-f” – include the batch folder if one is specified when uploading.

“-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

PaperStream Integration for Teams Settings

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration 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.

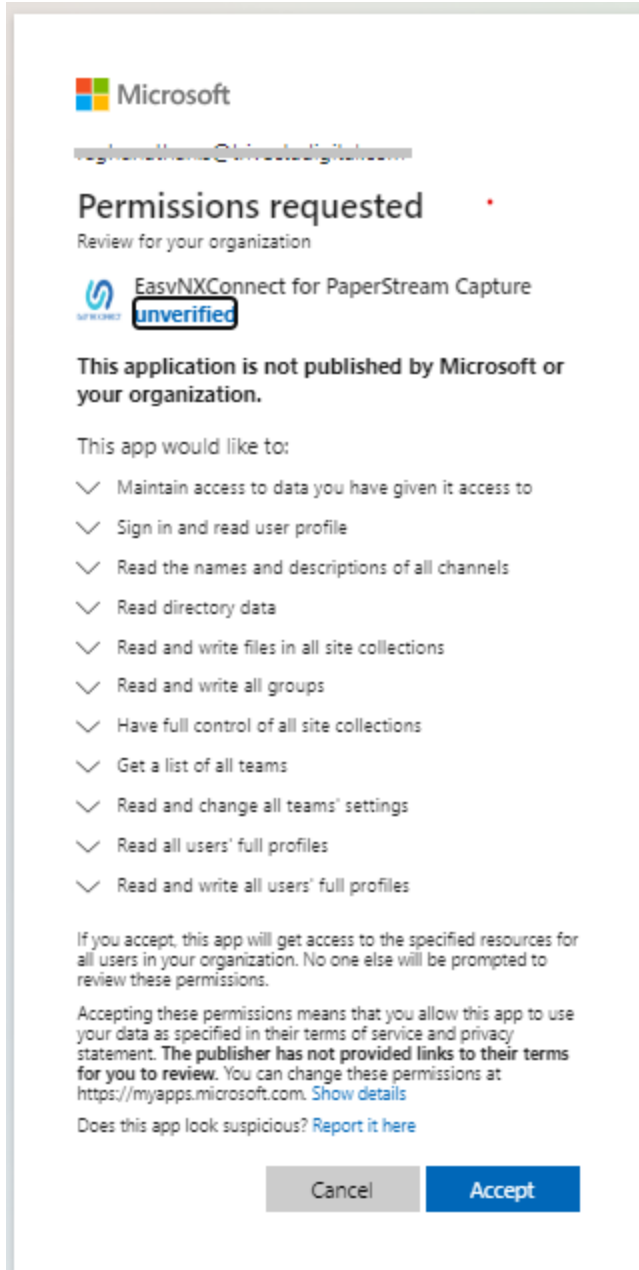
This section describes the Teams settings page in the PaperStream Integration Configurator application. This is an integration settings page that is displayed when the application is launched, the integrations link is clicked, and the Teams integration is chosen from the integrations dropdown.

The integration can export the scanned documents to a folder under a Channel in a specific Teams site.

To use this integration,

Once the Teams Integration settings are shown, you will see Application ID, Secret and User Principal Name. It is recommended not to change the Application ID and Secret values. These settings are required for authenticating the user and uploading the documents to a folder under a Channel in a Teams site. To obtain the User Principal Name check in the organization’s Azure Portal.

To authenticate the user, click on the “Grant Admin Consent” button, which will open a new popup window, in which Microsoft’s authentication (login) page will be shown. In this page, enter the account credentials and after successful authentication allow access to the resources by clicking on “Accept” button.



Once the process is completed the user will be authenticated and the Token expires on date will be displayed on the application.

For the authentication process to be successful, please use a user's account that has administrative privileges. For permissions and roles, check the organization's Azure Portal.

Finally, documents can be uploaded to a specific folder path under the top-level folder. Select User's Home Folder for the root folder or select Specific Folder to specify a path (in the *folder/subfolder/...* format). If this folder path does not exist, it will be created at the time of document upload. The folder will be created under the Channel on the Teams site.

Save the settings.

You can click on the Test Integration button to test the upload process. A document called Test Connector.pdf will be uploaded to the to the root or selected folder based on the settings. Verify that this process works before proceeding further.

If there is a problem uploading, the test integration 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.

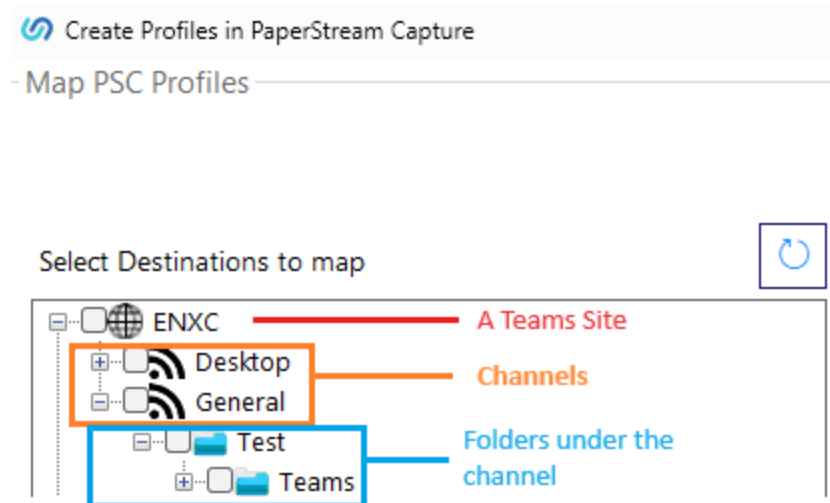
The Map Profiles button can be used to map specific buckets to PaperStream Capture Pro profiles.

When you click on Map Profiles, a list of all folders from the authenticated user's account will be shown on the left. A list of all the current profiles within PaperStream Capture Pro (except for ScanSnap mode profiles) will be shown 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 PaperStream Integration Configurator's Map Profiles window. Now you should be able to see profiles.

Select a profile as a template (to copy settings from).

For Teams, the targets will be displayed like a tree structure. Top level elements are the Teams site, under which the Channels are displayed. When a channel node is expanded, the folders under that channel will be displayed.



User can create a profile to

- 1) Upload a file to a specific folder under a channel – To do this, expand the channel node and select a folder.
- 2) Upload a file directly under the channel – To do this expand a site and select a channel.
- 3) Upload a file directly under the default channel (General) of a site – To do this, select a select site.

Finally, click on Create Profile(s).

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.

The system creates a PaperStream Capture Pro profile with an abbreviated code for the selected destination (ODB) and the name of each selected folder. 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.

Now you can open PaperStream Capture Pro and launch the newly created profiles.

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 Teams.

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: PaperStream integrations, 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.

-site="sites/<Teams site name>" – NOTE: Here use the actual site name instead of the display name. Please make sure that the authenticated user has enough permission to access the specified site.

-ch="<name of the channel>" - NOTE: the channel must exist under the site specified in the -site parameter. Please make sure that the authenticated user has enough permission to read-write to this channel.

-t="<target folder path>" – specify the actual target folder path in place of <target folder path>

“-f” – include the batch folder if one is specified when uploading.

“-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

PaperStream Integration OCR Settings

The configuration application can be launched from the Start Menu by selecting the menu “PaperStream Integration Configurator” under All Apps. We recommend that you create a shortcut for this application on the desktop and pin it to the Start Menu.

This section describes the OCR Settings page in the PaperStream Integration Configurator. These settings apply to all applicable integrations. This is the last page that is displayed when the Configurator application is launched.

PaperStream Integration is designed to integrate with an external OCR engine that can process the scanned documents and extract the text data from them. PaperStream Integration will retrieve the text data and create searchable PDFs from the original scanned images and the extracted text data. Finally, any integration can be set up to upload the searchable PDFs and the associated text data to the destination. The data can be uploaded in XML or JSON format.

Note: OCR is not included with PaperStream Integration. Only integration is included. The user must have a separate subscription to the OCR engine that they want to use.

Select the OCR engine to use for extracting text. Currently this is limited to the Microsoft Azure Cognitive Services engine.

For Microsoft OCR, the end user must enter their OCR subscription account information. Enter the region where the Microsoft OCR subscription is registered (using other regions will work but may incur some additional cost). Then enter the subscription key below.

Finally, click on Add OCR to Profiles. This will pop up a dialog showing all the currently available profiles. Select the ones to which you wish to add OCR. This will enable OCR for the selected profiles. When those profiles are used, the documents will have the text extracted and stored as searchable PDFs.

Note: PDFs should be the output format for the searchable PDF generation to work. Also, if the subscription key is incorrect, the OCR processing will fail. OCR can only be added to profiles that use the PaperStream Integration system.

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