PaperVision Enterprise Epson Plug-In

Installation and Getting Started Guide

Version 1.0

DIGITECH SYSTEMS

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CHAPTER 1

Introduction

Welcome

Welcome to the *PaperVision Enterprise Epson Plug-In Installation and Getting Started* guide. The PaperVision Enterprise Epson Plug-In integrates into Epson's Document Capture Pro user interface, giving you the configuration settings and options you need to scan documents directly into existing projects in ImageSilo, PaperVision.com, or PaperVision Enterprise. This guide will walk you through the installation process and the configuration necessary to upload documents into your existing projects.

> **N O T E**
>
> This document describes the procedures you can follow to install and configure the PaperVision Enterprise Epson Plug-In. If you need help using Epson's Document Capture Pro, or configuring a scanner, please see the Document Capture Pro help file and documentation.

Get Product Support

Digitech Systems takes great pride in providing software that is simple to use, feature-rich, and flexible in architecture and integration capabilities. If you experience any difficulty with a PaperVision product, please contact us toll free at (877) 374-3569 or direct at (402) 484-7777 to experience our legendary customer service. Additionally, you may contact us at support@digitechsystems.com. Our technical support staff is available to serve you between the hours of 8:00 AM and 6:00 PM Central Time.

Digitech Systems' product features and enhancements are driven by you, our customer. If you have an idea for a future product feature or enhancement, please send an e-mail to dev@digitechsystems.com.

In addition to our legendary technical support staff, we also offer the following resources to help you answer questions and resolve issues.

- **MyDSI** - MyDSI is an interactive tool for all Digitech Systems customers. Log in to MyDSI at http://mydsi.digitechsystems.com to download product updates, license purchased software, view support contract renewals, and check the status of your software support cases and requests.
- **User Forums** - Log in to the User Forums at http://forums.digitechsystems.com to exchange answers and ideas with other users in our moderated community.
- **Knowledge Base** - Log in to search our extensive Knowledge Base at http://k-b.digitechsystems.com for articles on all Digitech Systems products.
- **Documentation** - For documentation describing the use and features of PaperVision Enterprise, ImageSilo, or PaperVision.com, refer to the appropriate PaperVision documentation.

System Requirements

You must have the following installed prior to using the PaperVision Enterprise Epson Plug-In:

- The appropriate TWAIN drivers for your operating system
- Epson's Document Capture Pro
- At least one existing project in PaperVision Enterprise, PaperVision.com, or ImageSilo, as well as one user with read/write access to the project

CHAPTER 2

PaperVision Enterprise Epson Plug-In Installation

Installation Wizard

The installation and setup of the PaperVision Enterprise Epson Plug-In requires that you follow the instructions on every screen. You can click the **Back** or **Next** buttons to move backward and forward through the screens. You can click the **Cancel** button to exit and close the Installation or Setup Wizard.

Install the PaperVision Enterprise Epson Plug-In

Before installing the PaperVision Enterprise Epson Plug-In, make sure you have reviewed the system requirements, see "System Requirements" on page 6 for more information.

To install the PaperVision Enterprise Epson Plug-In

1. From the location where you downloaded the PaperVision Enterprise Epson Plug-In, run **EpsonPlugin.exe**.

   After a few moments, the **Welcome to the InstallShield Wizard for Epson Plugin** dialog box appears.
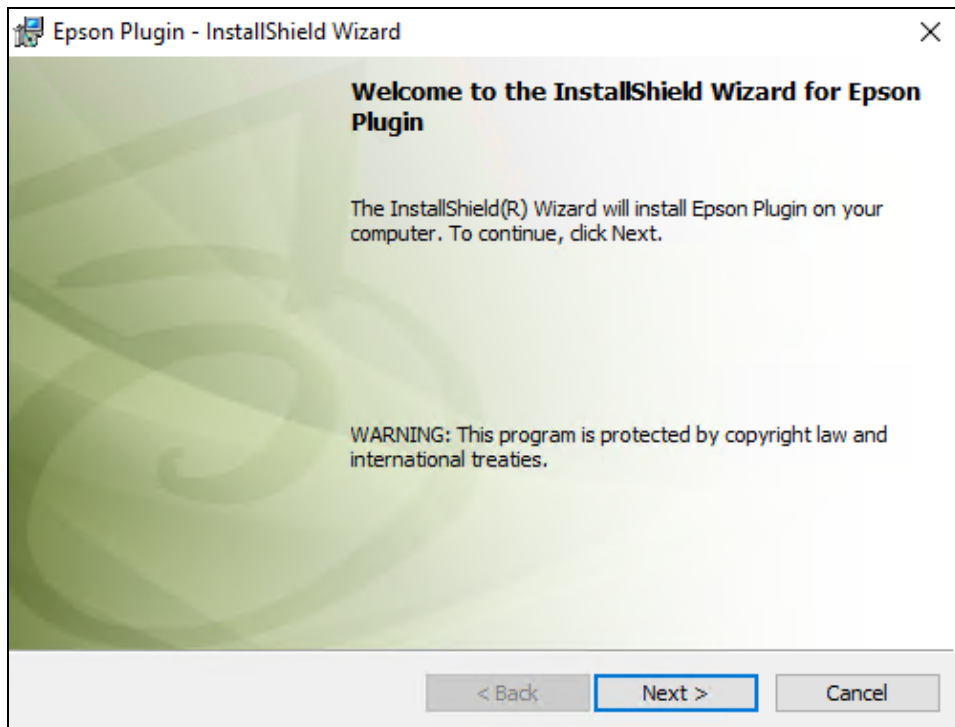
2. Click **Next** to open the **License Agreement** dialog box.
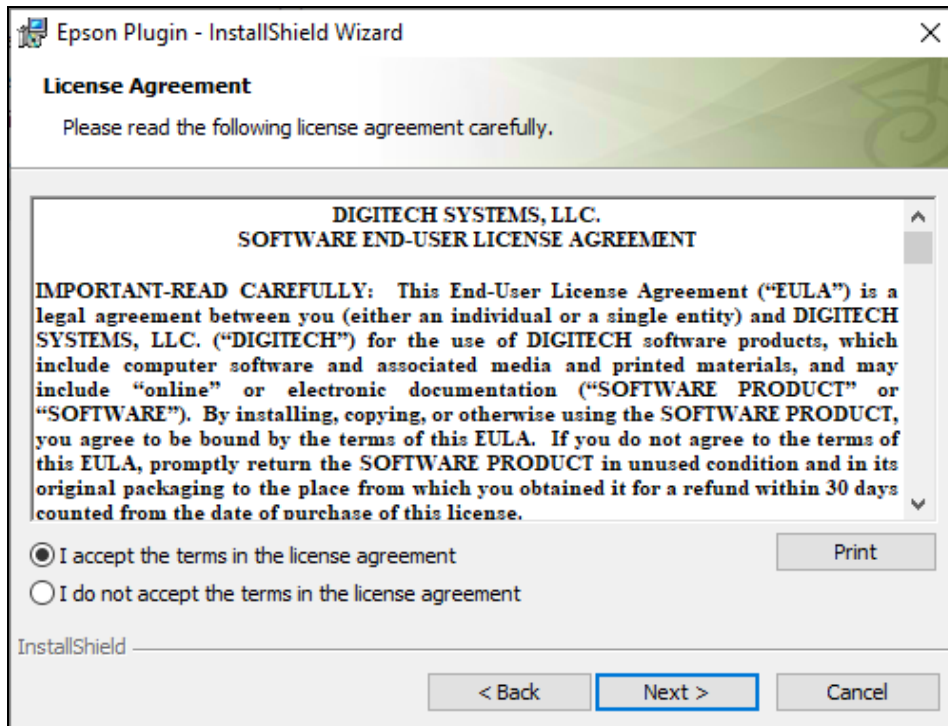
3. To accept the terms of the End-User License Agreement, select **I accept the terms in the license agreement**. If you decline the terms, the installation will terminate.

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

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4. Click **Next** to open the **Destination Folder** dialog box.
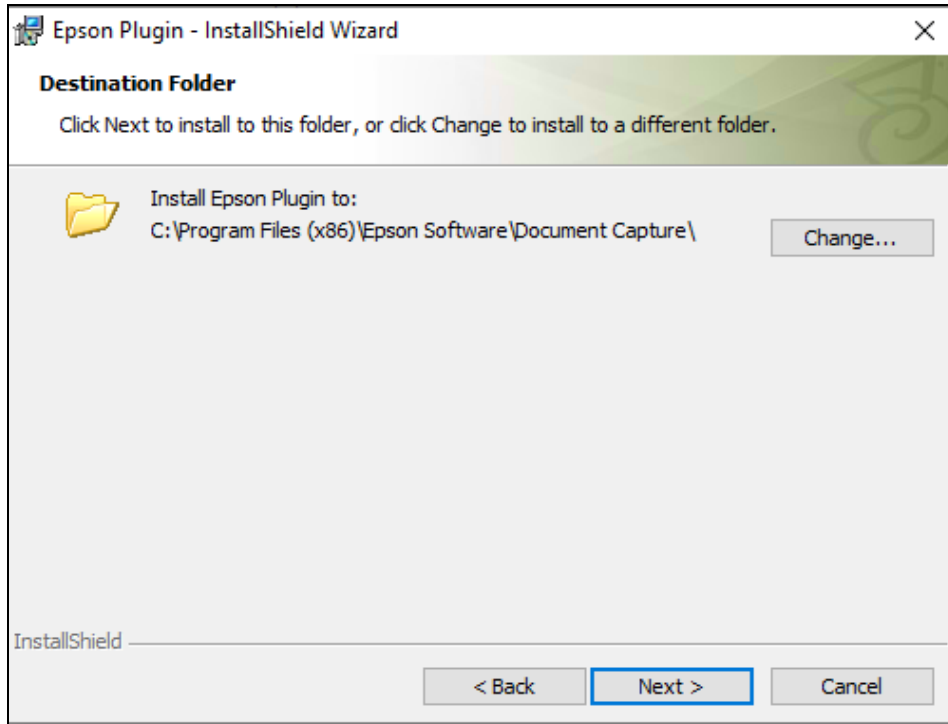
5. Do one of the following:

- To install the PaperVision Enterprise Epson Plug-In in the default location, click **Next** to open the **Ready to Install the Program** dialog box.

- To install the PaperVision Enterprise Epson Plug-In in a different folder, click **Change** to open the **Change Current Destination Folder** dialog box. Specify the destination folder you want to use by browsing to the folder, or typing the location in the **Folder name** box.
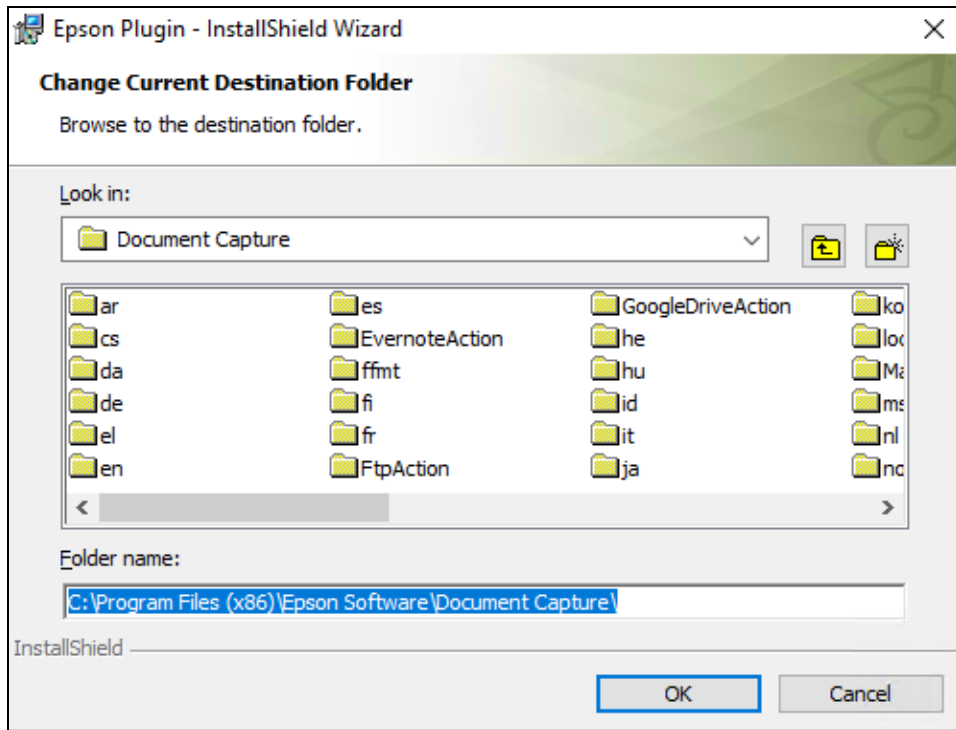
Click **Ok**, and then click **Next** to open the **Ready to Install the Program** dialog box.

6. On the **Ready to Install the Program** dialog box, click **Install**.
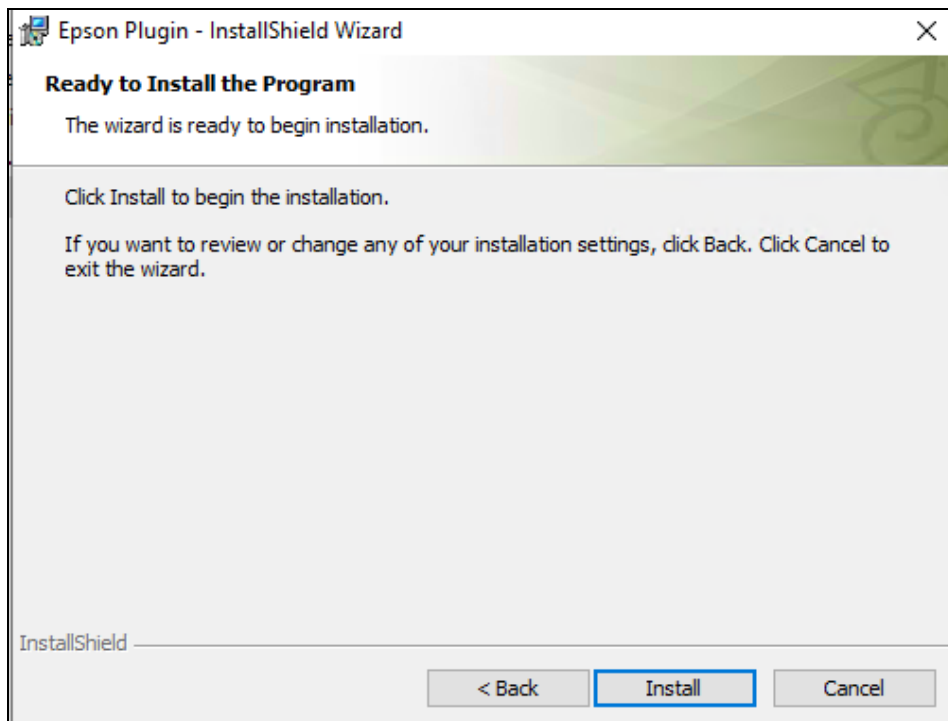
A progress bar may appear during installation.

7. After the PaperVision Enterprise Epson Plug-In is successfully installed, the **InstallShield Wizard Completed** dialog box appears.
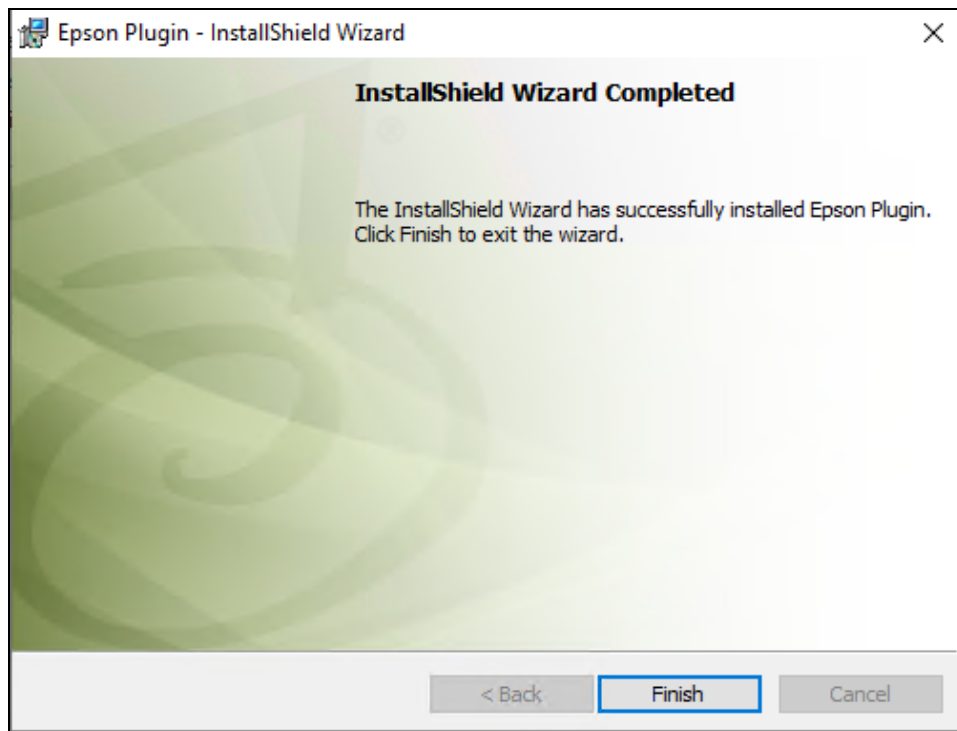
8. Click **Finish** to complete the installation process.

CHAPTER 3

Getting Started

Introduction

This content only describes the procedures specific to configuring Document Capture Pro to scan directly to ImageSilo, PaperVision.com, or PaperVision Enterprise. For help working with Document Capture Pro, setting up jobs, or configuring an Epson scanner, please see the Document Capture Pro help file and documentation.

Configure Document Capture Pro

You can configure Document Capture Pro to upload documents directly to an existing project. This document provides the procedures you can use to configure a new job, edit an existing job, or duplicate an existing job (including the default **Scan to PDF** job in the **Simple View**). Please refer to the Document Capture Pro documentation for instructions to perform these procedures using the **Standard View**.

To add a new job

1. Launch Document Capture Pro.

2. On the **Document Capture Pro** window, click **Job Settings** to open the **Job List**. Document Capture Pro includes the default job, **Scan to PDF**. The properties of any selected job appear on the **Job Summary** pane.

3. On the toolbar, click **New Job** to open the **Job Settings** window. By default, the **Scan Settings** dialog box appears on the right pane.

4. Type the name of the job in the **Job Name** box.

5. On the **Scan Settings** dialog box, select the appropriate settings for your job. Refer to the Document Capture Pro documentation for help with these settings.

6. Once you have configured the **Scan Settings**, click **Save** on the left pane, or click **Next** to open the **Save Settings** dialog box.

7. On the **Save Settings** dialog box, you can configure the file naming convention, file type, and specify the location where the images are saved. After you have selected the file type, click **Option** to specify the compression level and properties specific to the selected image type. The available options depend on the file type you selected. For example, to save black & white images using standard Group IV compression, select **TIFF** from the **File Type** list, then click **Option**, and then select **CCITT Group4** from the **B&W** list.

> **N O T E**
>
> The PaperVision Enterprise Epson Plug-In does not support the following file types: DOCX, XLSX, or PPTX.

8. Once you have configured the **Save Settings**, click **Send** on the left pane, or click **Next** to open the **Destination Settings** dialog box.

9. On the **Destination Settings** dialog box, you can configure the settings for the destination you choose. Click the down arrow in the **Destination** box, and then select: **ImageSilo**, **PaperVision.com**, or **PVE** from the list. Specify the following:

   * **URL** - Type the URL for the PaperVision Enterprise installation, for example: **http://server-name**. (This setting is only available for the PVE destination.)

- **Entity ID** - Type the Entity ID of the entity that contains the project where you want to store the documents.

- **Username** - Type the user name for the user with read/write access to the project.

- **Password** - Type the password for the user you entered.

- **Source IP** - Displays the IP address of the machine from which you are adding documents.

10. Click **Test Connection** to verify your connection settings. A green check mark appears if the connection was successful.

11. Click **OK** to save your configuration and return to the **Job List** pane.

12. (Optional) See the Document Capture Pro documentation for help configuring the **Button Assignment** button on the toolbar.

13. Repeat this procedure to create as many new jobs as you need. You can create up to 30 jobs.

14. (Optional) On the toolbar, click **Import Job** to import a job configuration that was created on another computer.

15. (Optional) On the toolbar, click **Export Job** to export a job configuration for use on another computer.

16. (Optional) You can select a job on the **Job List**, and then click **Up** or **Down** on the toolbar to change the order of jobs on the list.

To edit an existing job

1. On the **Document Capture Pro** window, click **Job Settings** to open the **Job List**. The properties of any selected job appear on the **Job Summary** pane.

2. Select the job from the **Job List** that you want to edit, and then click **Edit** on the toolbar to open the **Job Settings** window.

3. On the **Job Settings** window, you can edit any of the settings as needed. See "To add a new job" on the previous page for information on **Scan**, **Save**, and **Send** configuration options.

4. After you have edited the job, click **OK** to save your changes.

To duplicate an existing job

1. On the **Document Capture Pro** window, click **Job Settings** to open the **Job List**. The properties of any selected job appear on the **Job Summary** pane.

2. Select the job from the **Job List** that you want to duplicate, and then click **Duplicate** on the toolbar to open the **Job Settings** window.

3. In the **Job Name** box, type the name you want to use for the duplicate job.

4. You can edit any of the job settings as needed. See "To add a new job" on the previous page for information on **Scan**, **Save**, and **Send** configuration options.

5. Click **OK** to save your changes.

To delete an existing job

1. On the **Document Capture Pro** window, click **Job Settings** to open the **Job List**. The properties of any selected job appear on the **Job Summary** pane.

2. Select the job from the **Job List** that you want to delete, and then click **Delete**. (You must have at least one job remaining on the **Job List**.)

N O T E

When you click **Delete**, the job is deleted immediately. There is no confirmation dialog box.

Upload Documents

Once you have successfully configured Document Capture Pro to scan directly to ImageSilo, PaperVision.com, or PaperVision Enterprise, you can use the following procedure to upload documents to your existing project.

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This procedure outlines the steps necessary to upload documents while using the **Simple View** in Document Capture Pro. See the Document Capture Pro documentation for information using the **Standard View**.

To upload documents to a project

1. Open Document Capture Pro and select the configured scanner. Make sure your document is loaded in the scanner input tray.

2. On the **Job** pane, click the job you want to use, or optionally, click the button on the scanner that you configured. The pages you loaded are then scanned, and the **Upload** window opens.

3. On the **Upload** window, you can view the scanned documents. Thumbnails appear on the left pane, and the selected page appears in the center pane. You have the following options when viewing the document:

   - On the toolbar, click **Zoom In** to increase the size of the document.

   - On the toolbar, click **Zoom Out** to decrease the size of the document.

   - On the toolbar, click **Fit Width** to display documents at the width of the center pane.

   - On the toolbar, click **Fit Height** to display documents at the height of the center pane.

   - On the toolbar, click **Fit Page** to display documents so that the entire page appears in the center pane.

   - On the toolbar, click **Next Page**, or **Previous Page** to navigate through the pages of a document.

4. On the **Upload** window, select the project from the **Upload to Project** list to which you want to add documents. Only projects for which you have read/write access appear on the list.

5. (Optional) If you want to add the document to a folder, do the following:

   - Next to the **Folder** box, click the ellipsis button.

   - In the **Choose Folder** dialog box, do one of the following:

     - Click the folder to which you want to add the document.

     - To create a new folder, select the appropriate parent folder, click **New Folder**, type the name of the new folder, and then click **OK**.

6. A list of indexes assigned to the project you selected appears on the right pane. Only index fields for which you have read/write access are displayed.

7. Type the appropriate index value for each index that you want associated with the document.

8. (Optional) Click **Cancel** to discard the document without uploading it to a project.

9. Click **Start Upload** to upload the document to the project.

10. Click **OK**, and then click **Close** to complete the upload process. (Some confirmation windows may not be present if you have configured the job to use a specific button.)

Logging

Logging for the PaperVision Enterprise Epson Plug-In is available in the **PVCom.log** file located in the **Documents** folder. You can change the logging level, the log file name, and choose whether the log file is appended with new log entries as they are written or to overwrite existing logs with new logs.

To change logging options

1. Open the **Document Capture** folder located at: **C:\Program Files (x86)\Epson Software\Document Capture**.

2. Double-click the **PVCom.cfg** file. If you are prompted to do so, open the file with Microsoft Notepad.

3. You can change the following options as needed:

    *   **LoggingLevel** - Specifies the logging level: **Critical** (the default setting), **Error**, **Information**, or **Verbose**.

    *   **LogFileName** - To change the name of the log file that is created, highlight **PVCom.log**, and replace it with the file name you want to use.

    *   **AppendLog** - Specifies whether new logs append to the existing log file, or overwrite the log file with new log entries. Do one of the following:

        -   Type **true** to append the existing log file (default setting).

        -   Type **false** to overwrite existing logs with new log entries.

4. On the toolbar, click **File**, and then select **Save**.

5. Close Microsoft Notepad.