PaperVision®.com

Getting Started Guide

Version 85.0

PAPERVISION®.com

Any Document. Anywhere. Anytime.®

DIGITECH SYSTEMS

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CONTENTS

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CHAPTER 1

Introduction

Welcome

Welcome to PaperVision®.com. This powerful product provides:

- A way to effectively and securely manage, retrieve, and store information.
- Robust searching features for document retrieval.
- The ability to print and save documents, and send them via email.
- Document security features.
- Version control for documents.
- Multiple options for document viewing.
- Flexibility in architecture and integration options.
- Many other options not listed here.

IMPORTANT

The specific features available to you are based on the level of access you have purchased.

System Requirements

The following table shows the minimum system requirements for PaperVision.

Component	Requirement
Internet Browser	Internet Explorer® 11 (PaperVision Viewer and Browser-Based Viewer) Mozilla Firefox® latest version (PaperVisionViewer and Browser-Based Viewer) Google Chrome™ latest version (PaperVision Viewer and Browser-Based Viewer) Safari® on iPad devices and Macs latest version (Browser-Based Viewer)
Screen Resolution	SVGA Monitor (1024 x 768 or higher recommended)

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, please contact us toll free at (833) 374-3569 to experience our legendary customer service. Additionally, you may contact us at pvsupport@papervision.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.

- **Training Videos** - Visit our YouTube channel to view training videos for PaperVision.com at https://www.youtube.com/playlist?list=PLgibup9lBPIAPGm0aMm5YEN3W1Mi1Ovvu.
- **Knowledge Base** - Log in to search our extensive Knowledge Base at http://k-b.digitechsystems.com for helpful articles on all Digitech Systems products.
- **Documentation** - For documentation describing the use and features of PaperVision.com, refer to the PaperVision.com product guides. To access the online help and manuals from the Paper-Vision.com software, click the **Help** menu.

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CHAPTER 2

Get Started

Configure PaperVision.com

This document outlines the procedures you can follow to quickly configure PaperVision.com and add users and documents. The general sequence you will follow is listed below.

1. Log in to PaperVision.com. See "Log In" below for more information.
2. Create new users. See "Create a New User" on page 14 for more information.
3. Create a project. See "Create a Project" on page 18 for more information.
4. Configure index fields for the project. See "Configure Index Fields" on page 19 for more information.
5. Add documents to a project. See "Add Documents to a Project" on page 24 for more information.
6. Search for documents. See "Search for Documents" on page 28 for more information.
7. (Optional) Install the PaperVision.com Client. See "Install the PaperVision Client" on page 32 for more information.

Keep in mind that the features available to you, and the number of users and projects you can add, depend on the level of access you have purchased. Contact Digitech support at (833) 374-3569 for information on changing your level of access.

Log In

When you log in to PaperVision.com, the system authenticates your access based on the user name and password you provide.

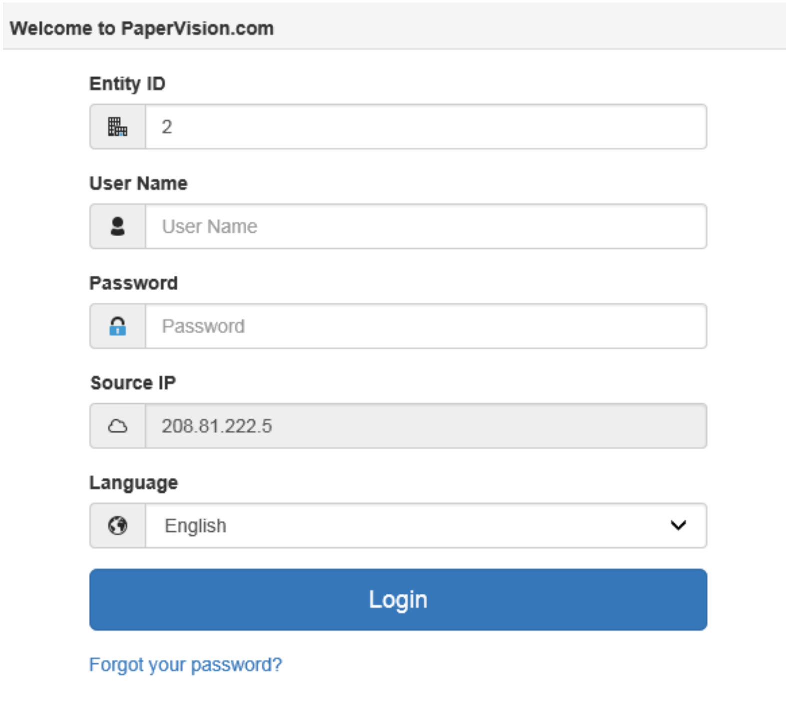
Before you can log in to PaperVision.com, you must first receive the following information from Digitech Systems:

- The URL to access PaperVision.com
- Your user name and password
- Your entity ID

To log in

1. Start your web browser.
2. In the Address bar, type the URL provided to access PaperVision.com: **https://login.papervision.com**.

3. The **Welcome to PaperVision.com** dialog box appears.



4. (Optional) On some devices, you have the option to use either a touch screen, or a mouse (or track pad). Click the option that describes how you will interact with the device.
5. In the **Entity ID** box, type your entity ID.
6. In the **User Name** box, type your user name.
7. In the **Password** box, type your password.
8. From the **Language** list, select the appropriate language.
9. Click **Login**.

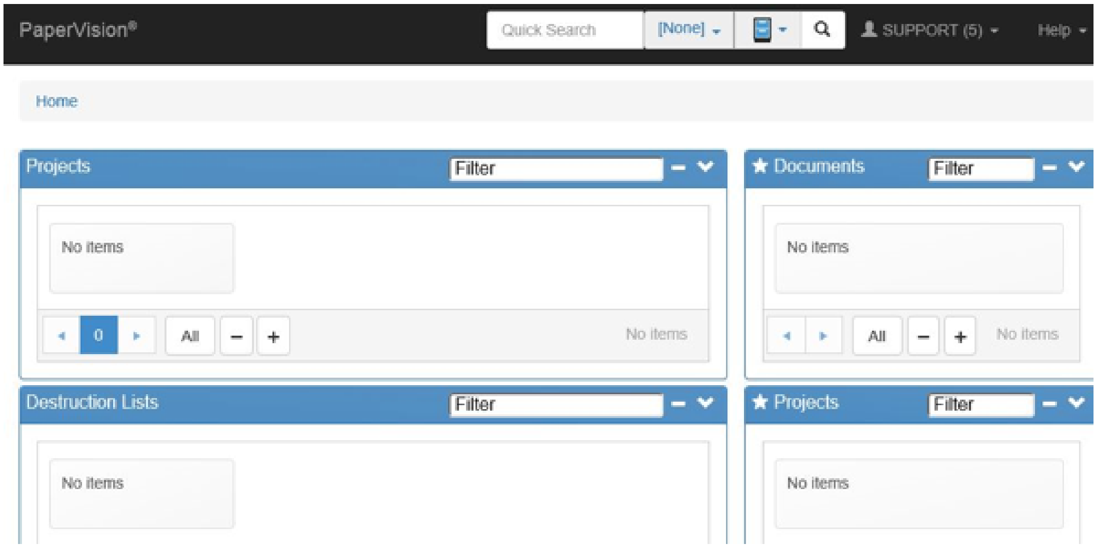
   By clicking **Login**, you acknowledge that you accept the terms of the Digitech Systems acceptable use policy.

NOTE

If your session times out and you log in again, the application retains the most recent page you accessed. The amount of time before your session times out depends on the setting the administrator assigned.

Main Window Overview

After you have logged in to PaperVision, the main window appears.



Click **Help** at any time to open the help files for more detailed information, and to learn more about the features available in the main window.

Log Out

We recommend that you log out from PaperVision each time you are finished with your session.

To log out

- On the title bar, click the down arrow by your user name, and then click **Logout**. Click **Yes** on the confirmation message.

CHAPTER 3

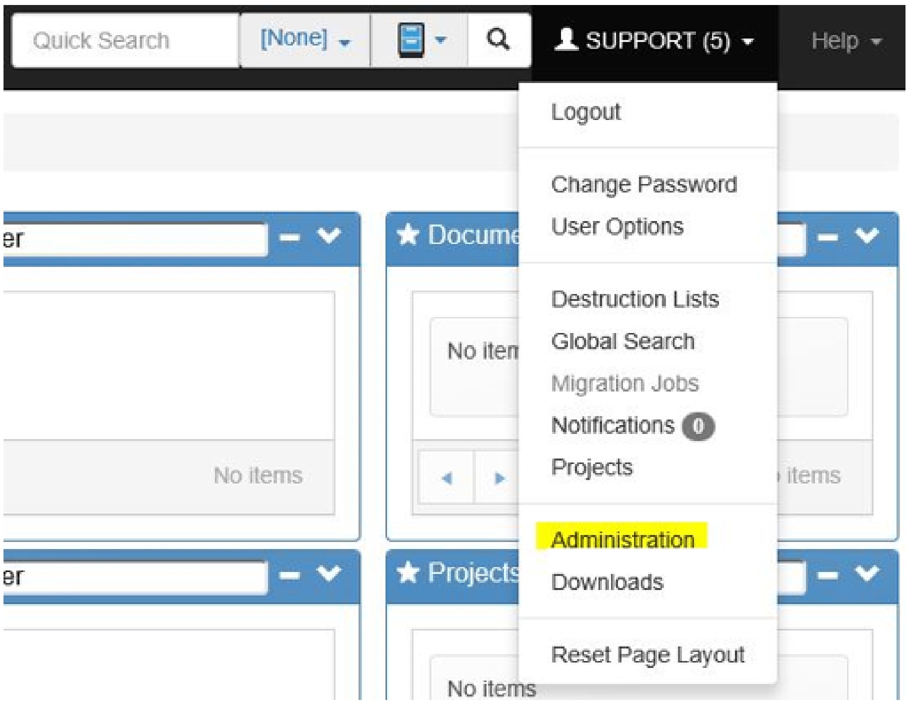
System Users

Create a New User

After you have logged in to PaperVision.com for the first time, the next configuration step is to create new users. The number of users you can create depends on the level of access you have purchased.

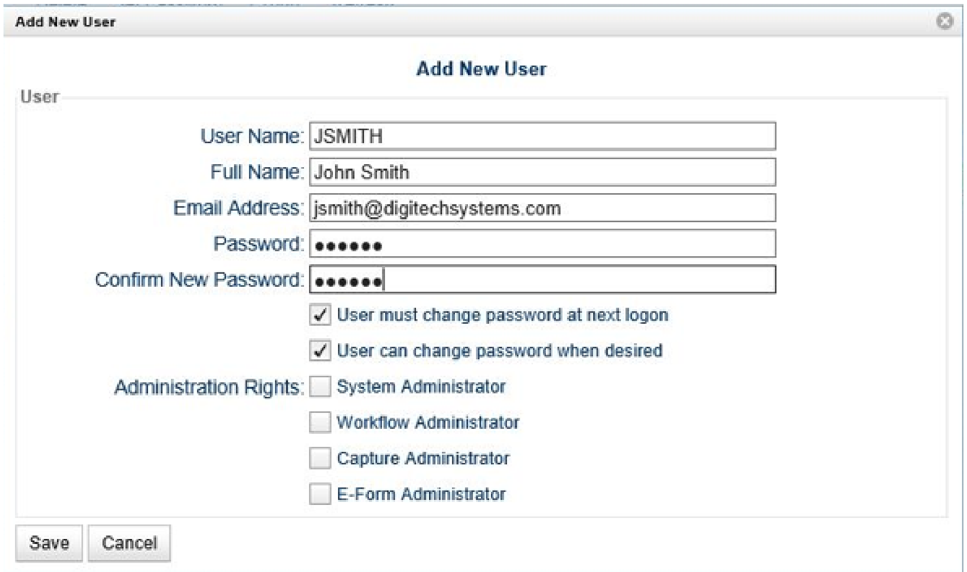
To create a new user

1. Log in to PaperVision.com. See "Log In" on page 10 if you need help.
2. On the title bar on the main window, click the down arrow next to your user name.
3. Click **Administration** to open the **PaperVision.com Administration Console**.



4. On the left pane, if necessary, expand **Entity ID *X* Properties**, and then expand **General Security**.
5. Click **System Users**.

6. On the toolbar, click **Add User** to open the **Add New User** dialog box.



7. In the **Add New User** dialog box, in the **User Name** box, type the name that will be used to log in.
8. (Optional) In the **Full Name** box, type the user's full name. (The user's full name is referenced in some reports.)
9. (Optional) In the **Email Address** box, type the user's email address that will receive system notifications (if configured to do so).
10. In the **Password** box, type the initial password the user will use to log in.
11. In the **Confirm Password** box, type the user's password again to confirm it.

N O T E

We recommend that you never leave a password set to a blank value, as it can pose a security risk.

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12. To force the user to change the password the next time they log in, select **User must change password at next login**.
13. To allow the user to change the password at any time, select **User can change password when desired**.
14. In the **Administration Rights** area, select the appropriate user type. To create a regular user, clear all of the check boxes. You can specify the following user types.
    - **System Administrator** - When you select this check box, the user can configure all administrative settings for the entity and has access to all functionality in all projects.

NOTE

If you select System Administrator, the other user types are automatically assigned to the user.

- **Workflow Administrator** - When you select this check box, the user can design and configure workflows within the entity. They can configure workflow definitions for any project and view workflow history and workflow status reports, but they have no access to documents or functions in any projects unless a system administrator explicitly grants them access. If they have access to view documents within a project, workflow administrators can create workflow instances for a particular document and view its workflow status.
- **Capture Adminstrator** - When you select this check box, the user can configure jobs in the PaperVision Capture product. This setting is not used in PaperVision.com, and Capture administrators have no administrative capabilities in PaperVision.com.
- **E-Form Administrator** - When you select this check box, the user can create E-Forms in PaperVision.com.

15. Click **Save** to save the user.
16. Repeat this procedure to create the users you need for your organization.

System Users

You must create a user account for each person who uses PaperVision.com. You can view a list of users that exist for your entity.

To view system users

1. Log in to PaperVision.com. See "Log In" on page 10 if you need help.
2. On the title bar on the main window, click the down arrow next to your user name.
3. Click **Administration** to open the **PaperVision.com Administration Console**.
4. On the left pane, if necessary, expand **Entity ID *X* Properties**, and then expand **General Security**.
5. Click **System Users**.

   The right pane shows a list of system users.

2 System Users Found

Select All

User Name	Full Name	Email	Type
JSMITH	John Smith	jsmith@digitechsystems.com	User
BJONES	Bob Jones	bjones@digitechsystems.com	User,System Administrator

CHAPTER 4

Project Configuration

Project Configuration Overview

A project is a logical grouping of documents based on a common indexing schema. For example, ABC Company has three projects: Human Resources, Accounts Payable, and Sales.

- The Human Resources project contains employee records and health insurance information.
- The Accounts Payable project contains billing, purchase order, and invoice information.
- The Sales project contains prospect and client information.

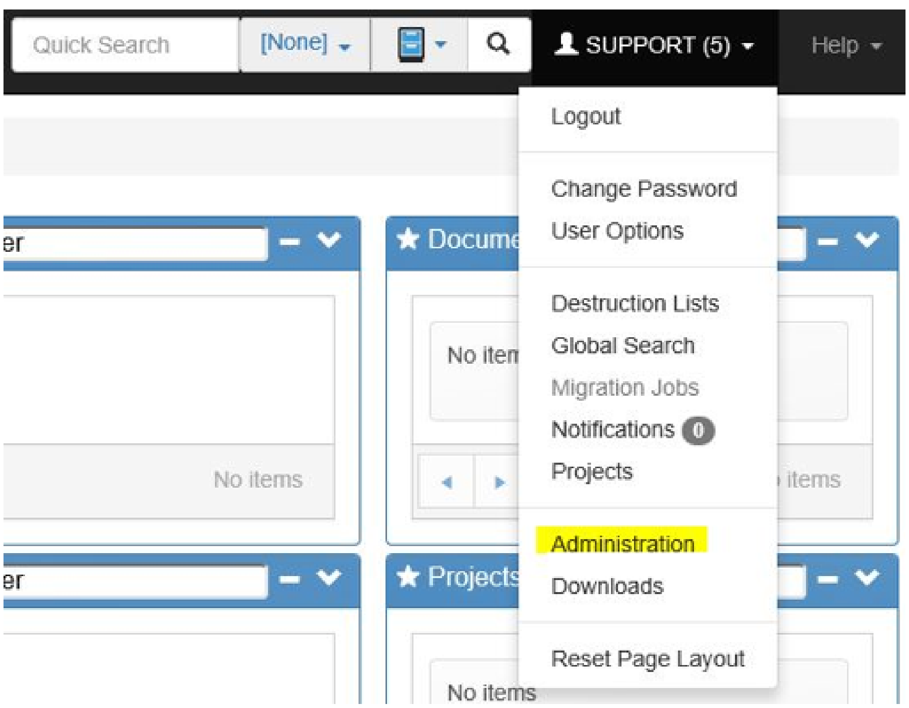
Each of these projects is a separate logical grouping within the ABC Company entity and requires different index criteria. Project names must be unique within an entity. The number of projects you can create is determined by the level of access you have purchased. Projects support up to 200 named index fields per document.

Create a Project

You will store and organize your documents by projects. As part of your initial PaperVision.com configuration, you must create at least one project.

To create a project

1. Log in to PaperVision.com. See "Log In" on page 10 if you need help.
2. On the title bar on the main window, click the down arrow next to your user name.
3. Click **Administration** to open the **PaperVision.com Administration Console**.



4. On the left pane, if necessary, expand **Entity ID *X* Properties**, and then expand **General Security**.

5. Click **Projects**.

   A list of projects appears on the right pane. Because you have not yet created any projects, this pane is empty.

6. On the toolbar, click **Add** to open the **New Project** dialog box.
7. In the **Project Name** box, type the name of the new project. For this example, type **Accounts Payable**.
8. Click **Save**.

   The new project now appears on the right pane.

Configure Index Fields

Document index fields contain values that let you identify key elements of documents within a project. You then use these index field values to search for and retrieve documents in PaperVision.com. When you enter an index value to perform a search for a document, the application compares the value you entered against your database tables and retrieves documents that meet your specific criteria.

Once you have created a project, you must then add index fields to the project. After an index field is created, it is added to all of the documents in the project.

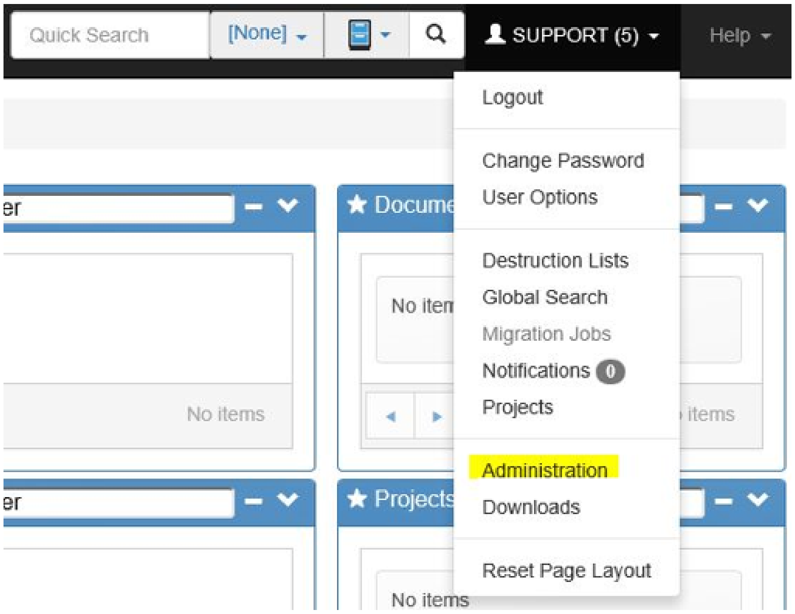
For our example, we will create three new index fields for the Accounts Payable project we just created.

- **Company Name** - Text field
- **Invoice Number** - Number field
- **Amount** - Currency field

To add indexes to a project

1. Log in to PaperVision.com. See "Log In" on page 10 if you need help.
2. On the title bar on the main window, click the down arrow next to your user name.

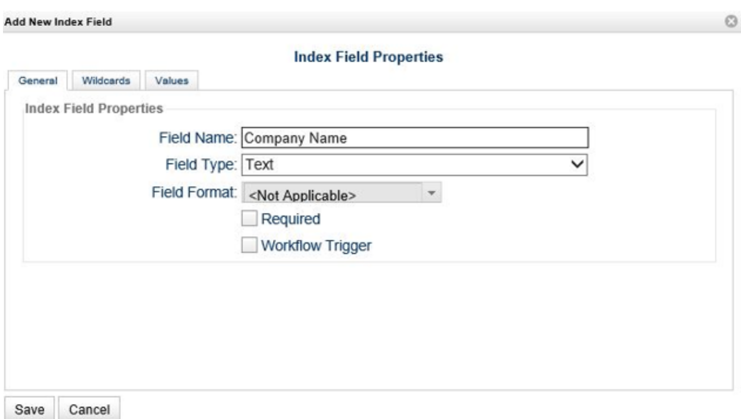
3. Click **Administration** to open the **PaperVision.com Administration Console**.



4. On the left pane, if necessary, expand **Entity ID *X* Properties**, and then expand **General Security**.
5. Click **Projects**.

   A list of projects appears on the right pane. Select the **Accounts Payable** project you created in the previous example.
6. The first index field we will create is Company Name.

   On the toolbar, click **Add** to open the **Add New Index Field** dialog box.
7. On the **General** tab, in the **Field Name** box, type **Company Name**.
8. From the **Field Type** list, select **Text**. This field type stores up to 255 characters of text. Click **Save**.



9. The next index field we will create is Invoice Number.

   On the toolbar, click **Add** to open the **Add New Index Field** dialog box.

10. On the **General** tab, in the **Field Name** box, type **Invoice Number**.
11. From the **Field Type** list, select **Number**. This field type stores whole-number values between -2,147,483,648 and 2,147,483,647. Click **Save**.
12. The last index field we will create is Amount.

    On the toolbar, click **Add** to open the **Add New Index Field** dialog box.
13. On the **General** tab, in the **Field Name** box, type **Amount**.
14. From the **Field Type** list, select **Currency**.
15. From the **Field Format** list, select **$0.00**, and then click **Save**.
16. The three index fields you created now appear on the right pane.

Project Accounts Payable: 3 Document Index Fields Found

Select All

Field Name	Field Type	Field Format
Company Name	Text	<Not Applicable>
Invoice Number	Number	<Not Applicable>
Amount	Currency	Currency

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CHAPTER 5

Add Documents

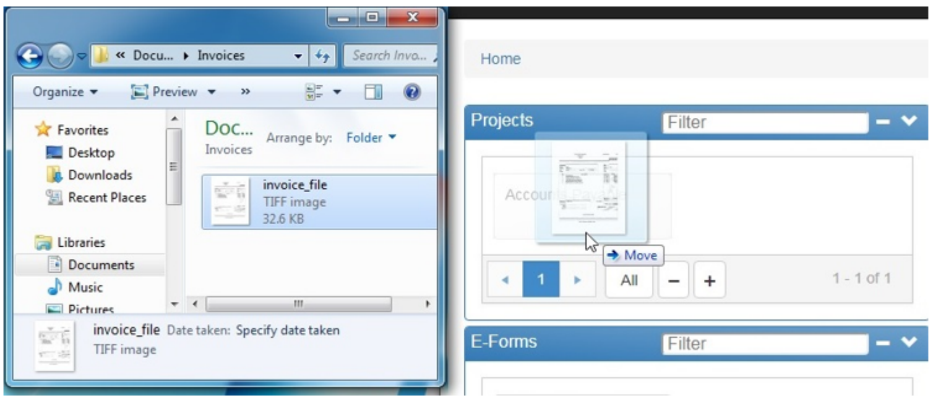
Add Documents to a Project

Documents contain the individual pages or images for a given set of index values. With PaperVision.com you can quickly and easily upload and index documents by simply dragging and dropping files into a project.

In this example, we have already added users, created an Accounts Payable project, and defined three index fields for the project. The next step is to add documents to the project and index those documents.

To add documents to a project

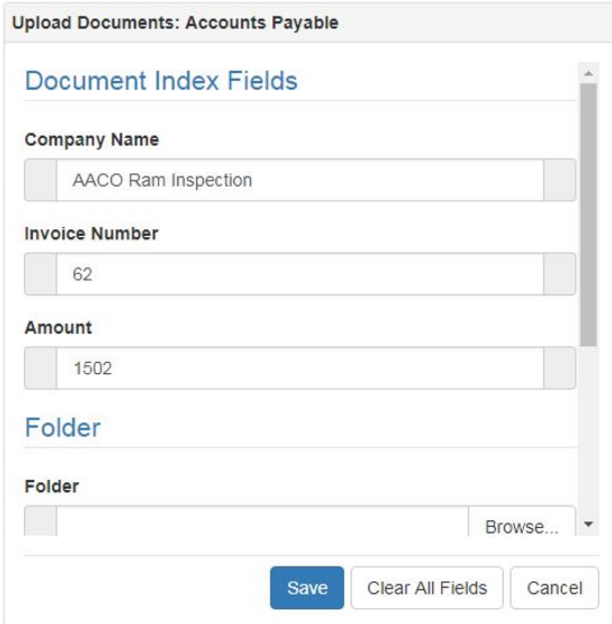
1. Log in to PaperVision.com. See "Log In" on page 10 if you need help.
2. On the main window, make sure you can see the **Accounts Payable** project on the **Projects** pane.
3. Locate the file you want to add to the project, and drag it to the **Accounts Payable** project.



4. When you drag the document to the project, the **Document Index Fields** dialog box appears.

   For this example, type the following information in the **Documents Index Fields** dialog box.

   - **Company Name - AACO Ram Inspection**
   - **Invoice Number - 62**
   - **Amount - 1502**



5. Click **Save** to upload the document to the project. A message appears confirming that the document was uploaded successfully.

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CHAPTER 6

Documents Searches

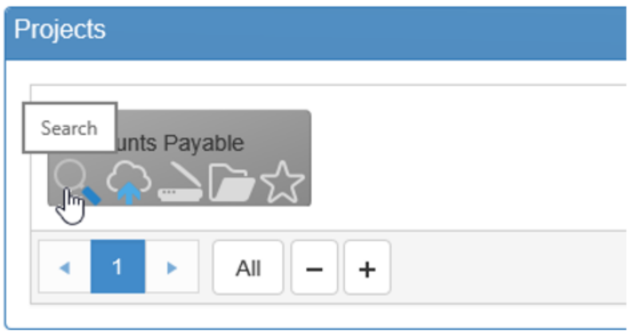
Search for Documents

With the comprehensive search capabilities in PaperVision.com, you can perform searches ranging from detailed criteria for specific index values, to broad document searches in a single project or across multiple projects. See the *PaperVision.com User Guide* for detailed instructions on performing document searches.

In our example, we will search for the document we added to the Accounts Payable project.

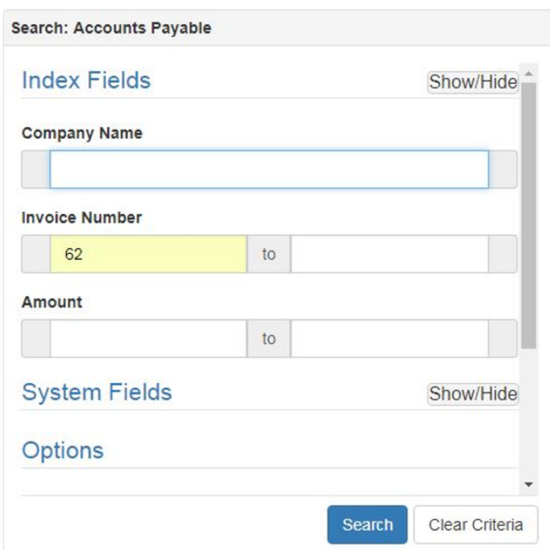
To search for a document

1. Log in to PaperVision.com. See "Log In" on page 10 if you need help.
2. On the main window, on the **Projects** pane, rest the pointer on **Accounts Payable**, and then click **Search**.

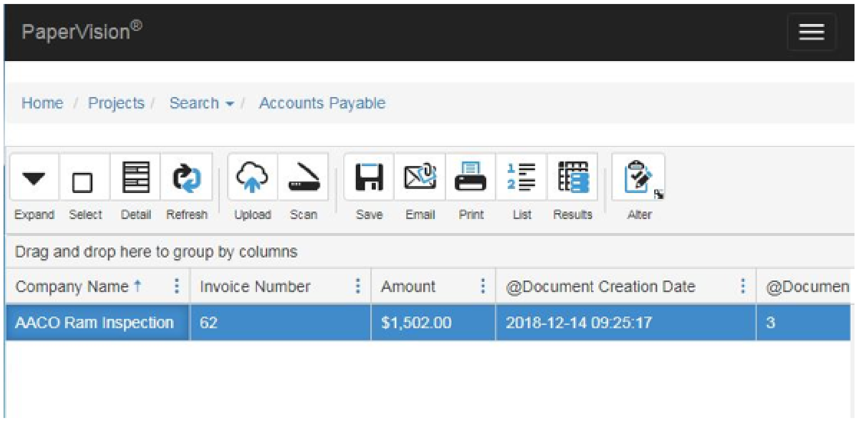


3. In this example, we can search for the document we indexed and added to the project earlier.

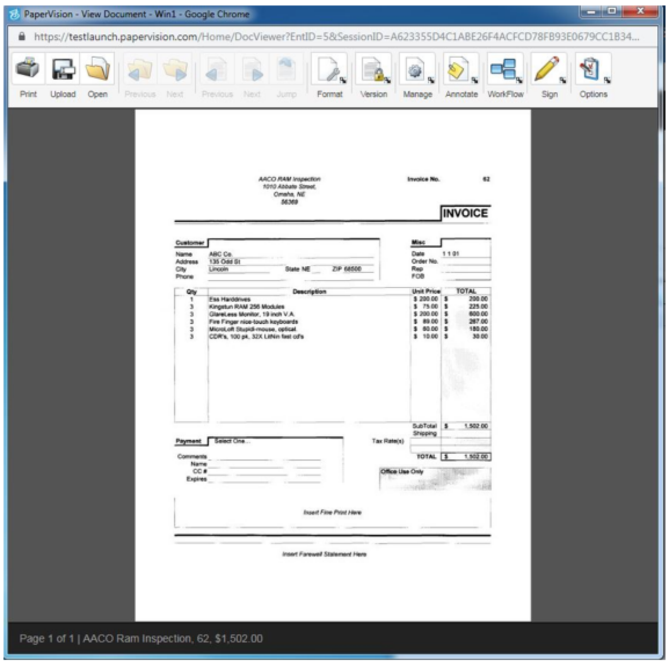
   On the **Search** dialog box, in the **Invoice Number** box, type **62**.



4. Click **Search**, and all the documents that match your search criteria appear in a document list.



5. Double-click the document in the list to open the document in a viewer.



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CHAPTER 7

PaperVision Client

Install the PaperVision Client

To use PaperVision.com's advanced features, such as E-Forms and Workflow, you must install the PaperVision Client.

If you have questions or would like more information regarding the PaperVision Client, please contact PaperVision.com support at pvsupport@papervision.com, or by phone at (833)-375-3569.

To install the PaperVision Client

1. Log in to PaperVision.com. See "Log In" on page 10 if you need help.
2. On the title bar on the main window, click the down arrow next to your user name.
3. Click **Downloads** to open the **Downloads** window.
4. Select **PaperVision Client**, and then click **Download**.
5. When prompted, select whether you want to run or save the application.
6. If you saved the application, after the download is complete, run the executable file.
7. On the **InstallShield Wizard** window, click **Next**.
8. Select **I accept the terms in the license agreement**, and then click **Next**.
9. Click **Install** to begin the installation.
10. After you are notified that the software is installed, click **Finish**.